



The Cardiff Economy and Labour Market

April 2017 – March 2018

(Produced June 2018)



Gweithio dros Gaerdydd, gweithio gyda'n gilydd
Working for Cardiff, working together



“Delivering effective research and consultation and first class research and information services”

Cardiff Research Centre delivers key research, information and multimedia services for Cardiff Council and other key organisations in Cardiff and Wales.

Core services include:

- Collection, analysis and interpretation of primary survey data.
- Analysis and interpretation of a wide range of secondary demographic and socio-economic statistical data.
- Specialised studies on a wide range of topics including social, economic and demographic subjects.
- Quantitative and qualitative research and consultation projects.
- Management Cardiff Citizens’ Panel.
- Focus Group and meeting facilitation.
- Advice and support on all aspects of research and consultation.
- GIS mapping services
- Professional multimedia support in relation to presentations, conferences, meetings, graphic design services and internet development.

For further information please contact

Cardiff Research Centre

☎ 029 2087 3217

✉ research@cardiff.gov.uk

✉ consultation@cardiff.gov.uk



#gweithiogydangilydd
#workingtogether



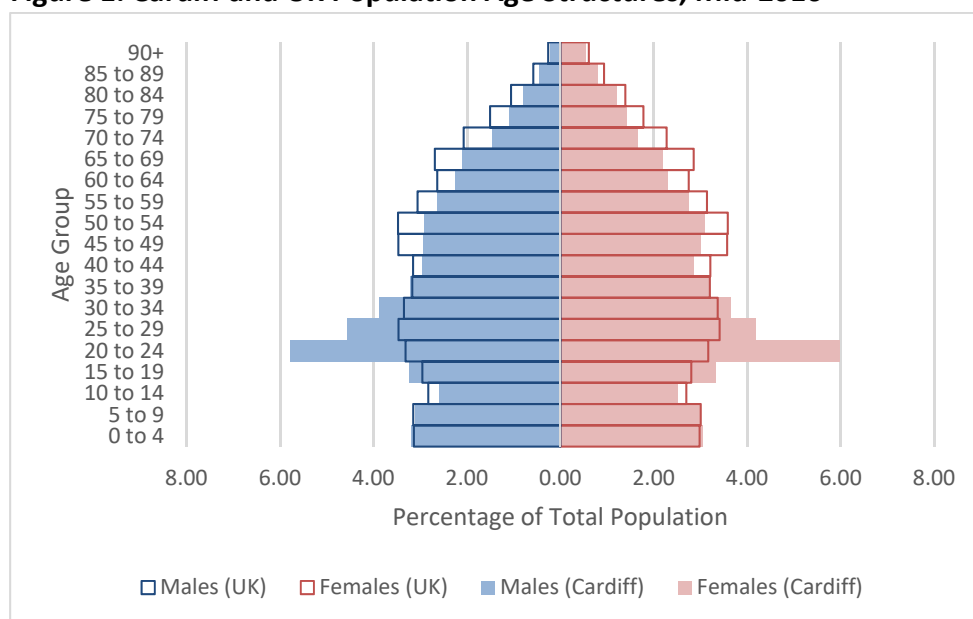
CONTENTS

| | Page |
|---|-------------|
| Population | 4 |
| Visitor Numbers | 5 |
| Commuting | 6 |
| Qualifications (Aged 16-64) | 7 |
| Earnings | 10 |
| Gross Disposable Household Income Per Head | 12 |
| House Prices | 13 |
| Housing Affordability | 14 |
| Gross Value Added (GVA) | 15 |
| Productivity | 18 |
| Employment Rate (Aged 16-64) | 20 |
| Private v Public Sector Employment | 21 |
| Full-Time v Part-Time Employees | 22 |
| Employment by Broad Industrial Sector | 23 |
| Employment in Welsh Government Priority Sectors | 25 |
| Occupation | 26 |
| Major Employers | 27 |
| Fast Growth 50 | 30 |
| Enterprises | 31 |
| Jobs Density | 33 |
| Economic Activity Rate (Aged 16-64) | 34 |
| Reasons for Economic Inactivity (Aged 16-64) | 35 |
| Unemployment Rate (Aged 16+) | 36 |
| Claimant Count (Aged 16-64) | 37 |
| Claimant Count (Aged 18-24) | 39 |

POPULATION

Cardiff has a population of 361,200, according to the mid-2016 population estimate, including 244,300 aged 16-64. Compared with the UK as a whole, Cardiff has a greater proportion of its population aged 15 to 34, but a smaller percentage aged 40+ (see Figure 1). By 2036, Cardiff's population is projected to increase by 20% to 433,400, including 273,700 aged 16 to 64, making it the fastest growing core city.

Figure 1: Cardiff and UK Population Age Structures, Mid-2016



Source: Cardiff Research Centre/ONS

The Cardiff City Region consists of the ten local authority areas of Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taf, Torfaen, and Vale of Glamorgan. According to mid-2016 population estimates, it has a population of 1.52 million, including 960,000 aged 16 to 64 (see Table 1).

Table 1: City Region Population Estimates, Mid-2016

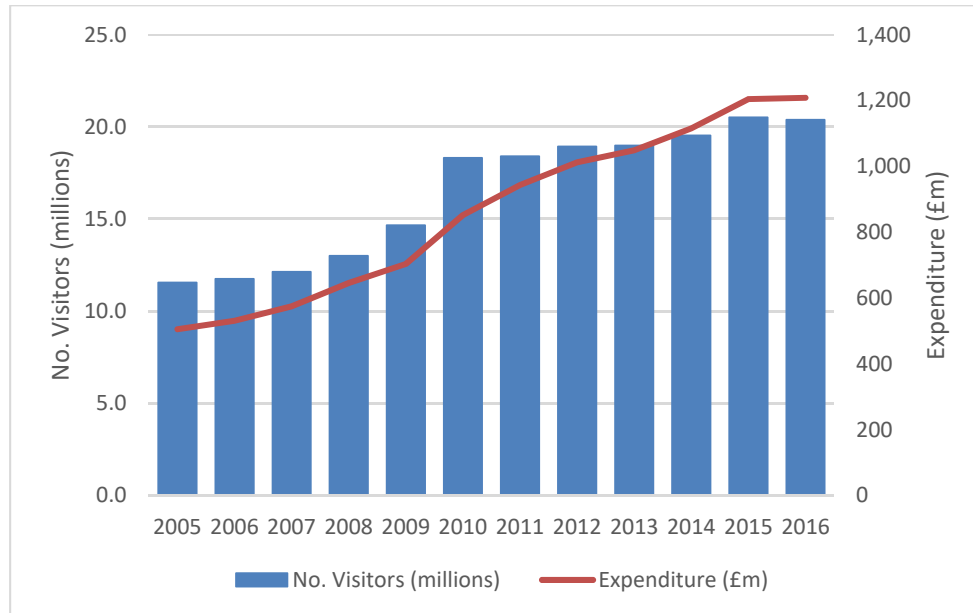
| City Region | Population mid-2016 (millions) |
|--------------------|--------------------------------|
| Greater London | 8.77 |
| West Midlands | 2.87 |
| Greater Manchester | 2.78 |
| West Yorkshire | 2.30 |
| North East | 1.97 |
| Glasgow | 1.82 |
| Liverpool | 1.54 |
| CARDIFF | 1.52 |
| Sheffield | 1.39 |
| Edinburgh | 1.36 |
| Bristol | 1.13 |

Source: ONS

VISITOR NUMBERS

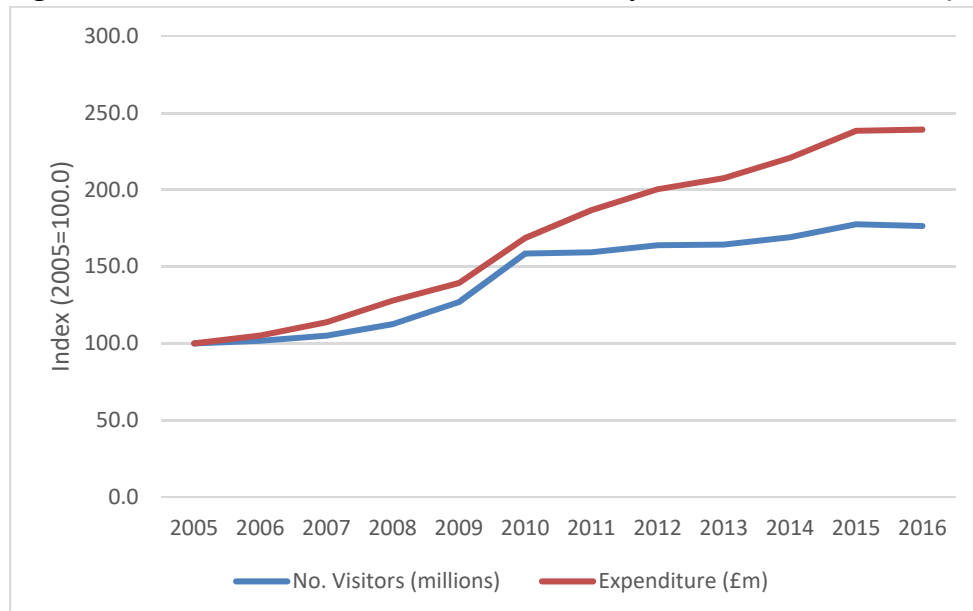
In 2016, more than 20 million people visited Cardiff with an economic impact of £1.2bn. Between 2005 and 2016, both the number of visitors to Cardiff and their expenditure in the city has followed an upward trend (see Figure 2). However, expenditure has increased at a faster rate – indicating that per capita spending has grown over the period (see Figure 3).

Figure 2: No. Visitors to Cardiff and Expenditure for Cardiff, 2005 – 2016



Source: STEAM

Figure 3: Index of No. Visitors to Cardiff and Expenditure, 2005 – 2016 (2005=100.0)

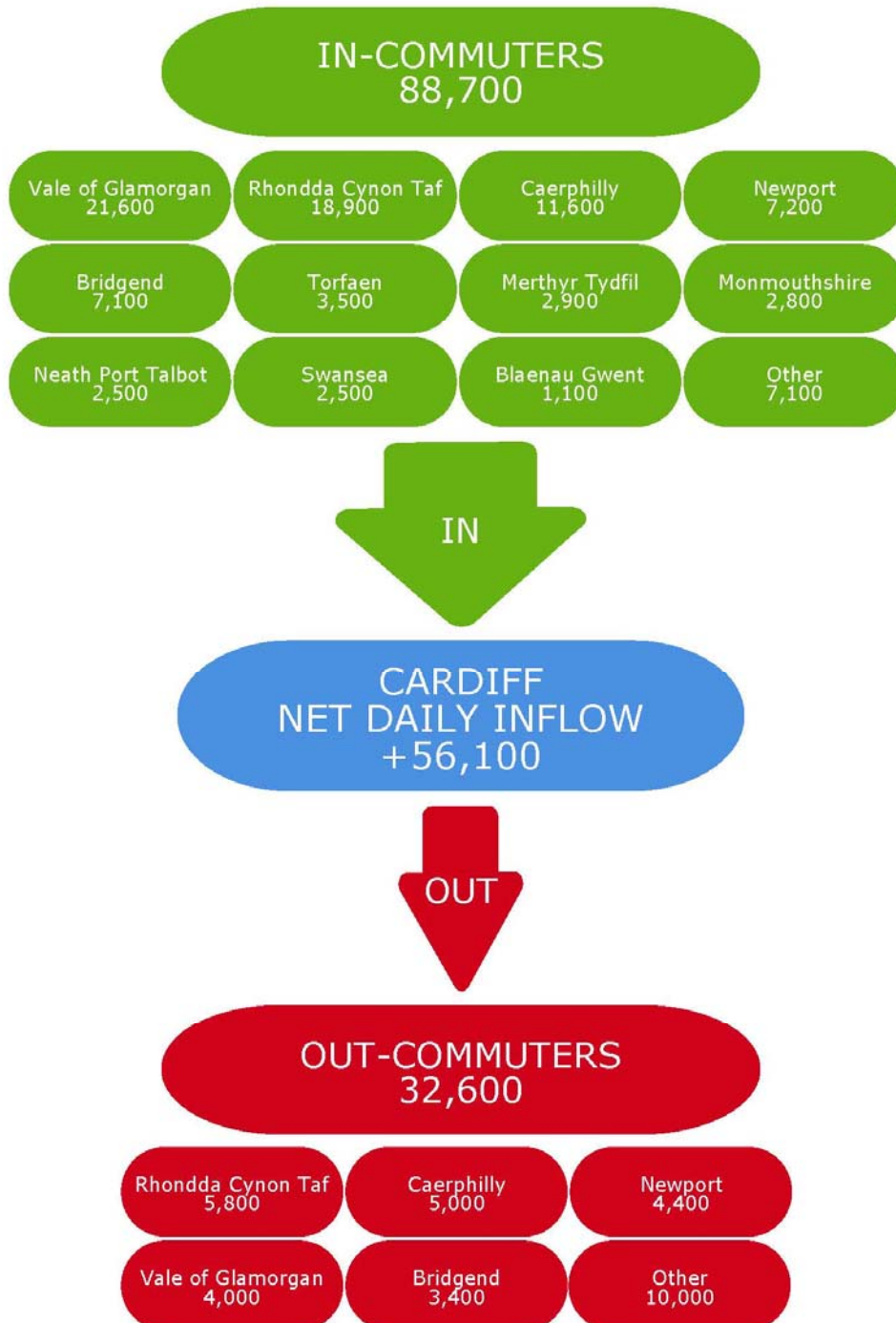


Source: STEAM

COMMUTING

Around 90,000 people commute into Cardiff each day with the city receiving a net daily inflow of 56,100 people (see Figure 4).

Figure 4: Cardiff's Commuting Pattern, 2017



Source: Welsh Government

QUALIFICATIONS (AGED 16-64)

Almost half (48.0%) of Cardiff's population aged 16 to 64 are qualified to NVQ4+, significantly above the comparative figures for Wales (35.1%) and the UK (38.4%). In addition, only one-in-fifteen (6.6%) have no qualifications. These figures compare well with other major cities (see Table 2).

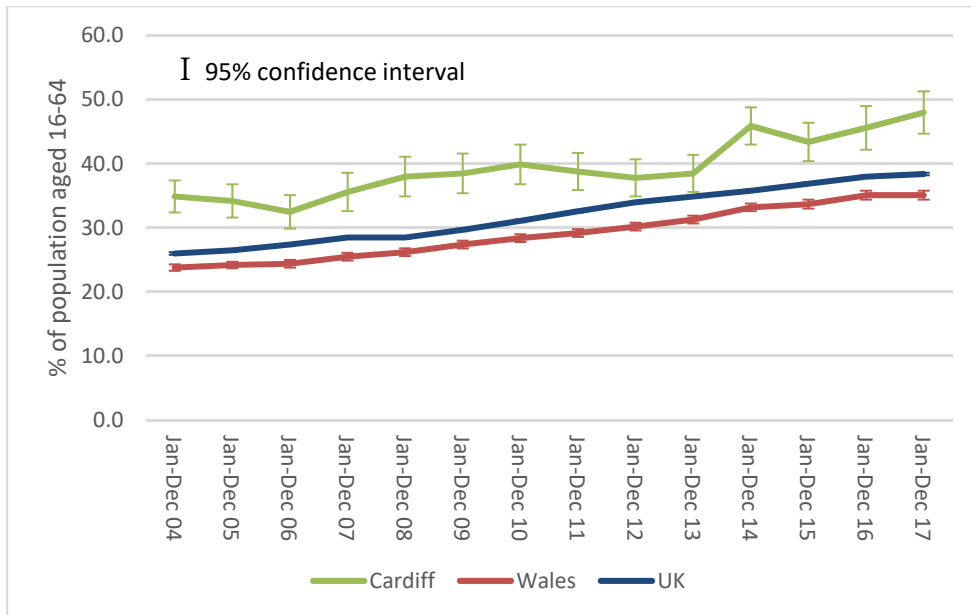
Table 2: Qualifications (Aged 16 to 64), Jan – Dec 2017

| Area | NVQ4+ | NVQ3 only | Trade Apprenticeships | NVQ2 only | NVQ1 only | Other Qualifications (NVQ) | No Qualifications (NVQ) |
|---------------------|-------------|-------------|-----------------------|-------------|------------|----------------------------|-------------------------|
| Edinburgh, City of | 57.8 | 10.8 | 5.3 | 8.7 | 7.1 | 7.2 | 3.2 |
| Bristol, City of | 54.2 | 15.0 | 2.1 | 10.7 | 8.2 | 4.6 | 5.1 |
| CARDIFF | 48.0 | 17.4 | 1.7 | 14.9 | 7.0 | 4.4 | 6.6 |
| Glasgow City | 46.3 | 11.8 | 2.5 | 12.4 | 7.4 | 7.1 | 12.4 |
| Sheffield | 41.7 | 15.5 | 3.1 | 15.6 | 10.6 | 5.0 | 8.5 |
| Manchester | 39.9 | 17.0 | 3.3 | 12.5 | 9.5 | 6.6 | 11.1 |
| Newcastle upon Tyne | 37.3 | 22.5 | 2.4 | 15.2 | 7.7 | 5.9 | 9.0 |
| Leeds | 36.4 | 17.2 | 3.1 | 15.3 | 10.9 | 6.0 | 11.2 |
| Liverpool | 35.0 | 15.9 | 2.5 | 18.3 | 10.4 | 4.7 | 13.1 |
| Birmingham | 31.4 | 18.4 | 1.2 | 14.4 | 11.2 | 10.8 | 12.6 |
| Nottingham | 30.1 | 21.4 | 2.8 | 14.2 | 9.6 | 8.9 | 12.9 |
| Wales | 35.1 | 17.8 | 3.4 | 17.9 | 11.2 | 6.0 | 8.7 |
| United Kingdom | 38.4 | 17.0 | 3.2 | 16.0 | 10.7 | 6.8 | 8.0 |

Source: Annual Population Survey, ONS

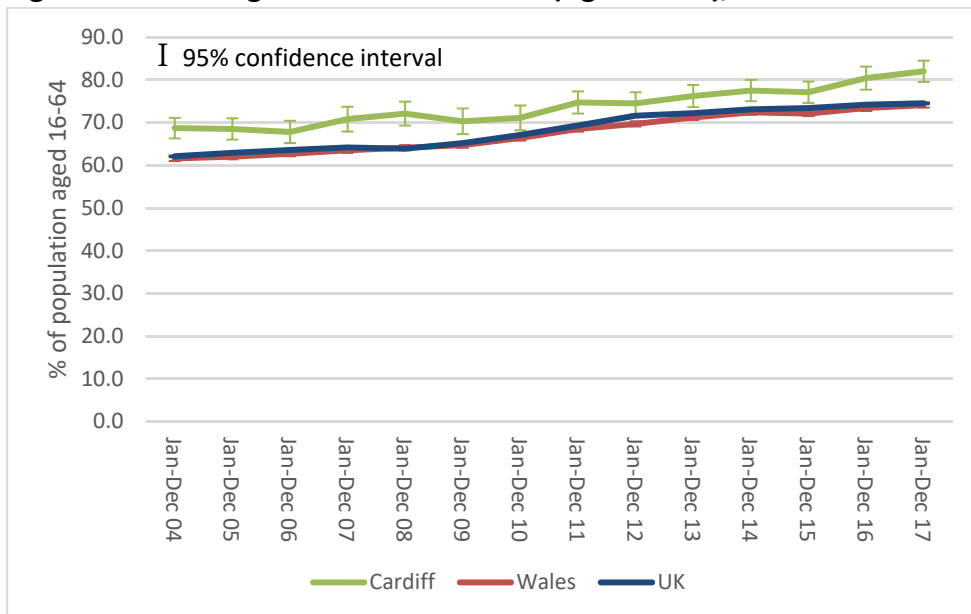
Since 2004, the qualification levels of the Cardiff population aged 16 to 64 have improved and compared favourably with those of Wales and the UK. The proportions qualified to NVQ4+ (Figure 5) and NVQ2+ (Figure 6) have increased over the period, while the percentage with no qualifications (Figure 7) has declined.

Figure 5: Percentage Qualified to NVQ4+ (Aged 16-64), Jan-Dec 2004 to Jan-Dec 2017



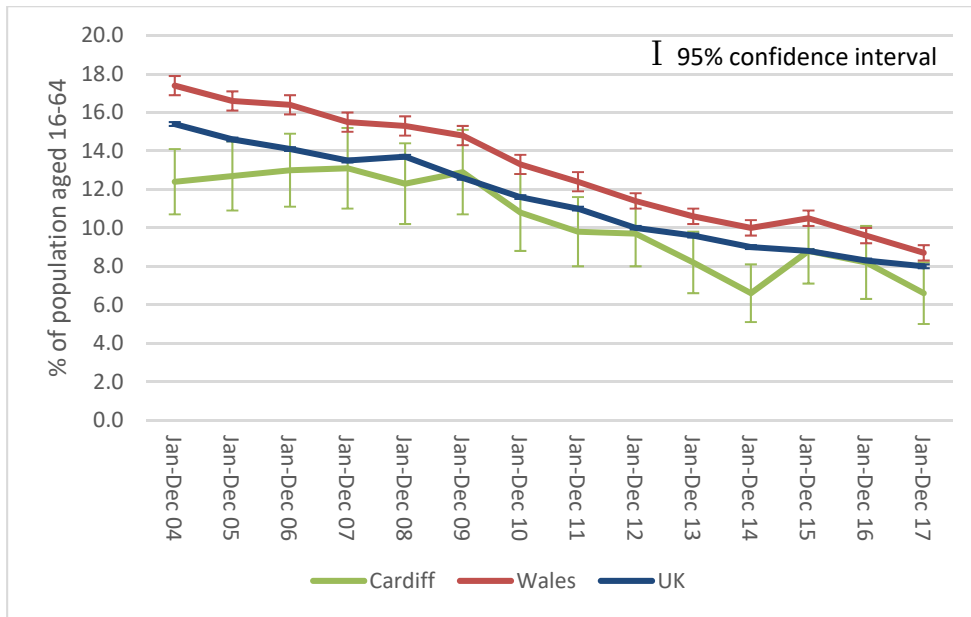
Source: Annual Population Survey, ONS

Figure 6: Percentage Qualified to NVQ2+ (Aged 16-64), Jan-Dec 2004 to Jan-Dec 2017



Source: Annual Population Survey, ONS

Figure 7: Percentage with No Qualifications (Aged 16-64), Jan-Dec 2004 to Jan-Dec 2017



Source: Annual Population Survey, ONS

EARNINGS

RESIDENT ANALYSIS

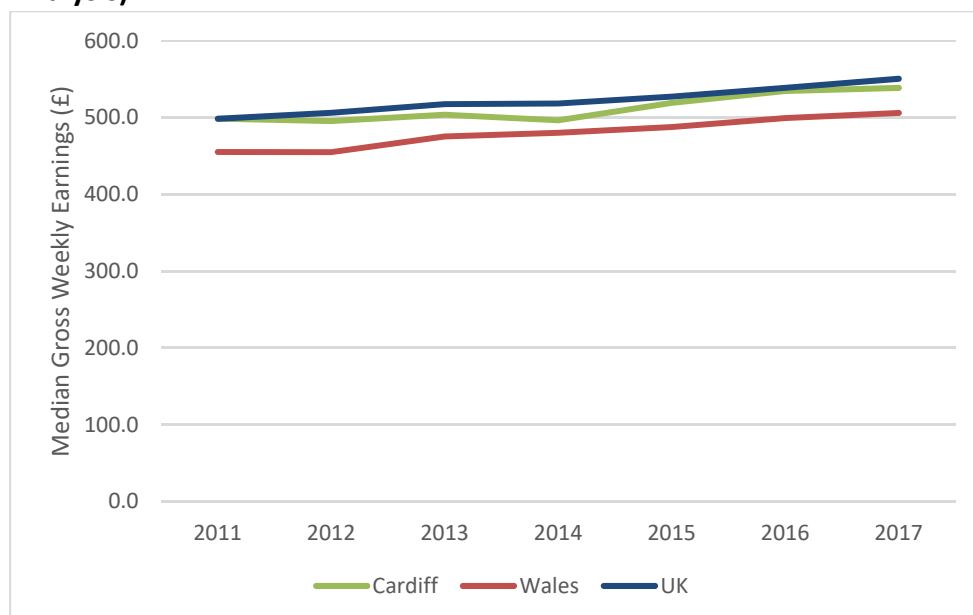
In 2017, the median gross weekly earnings of Cardiff residents working full-time were £538.5; up 0.8% on the previous year. This exceeded the earnings of most other major cities although, as has been the case since 2012, it was below the UK average (see Table 3 and Figure 8).

Table 3: Median Gross Weekly Earnings of Full-Time Workers, 2017 (Resident Analysis)

| Area | Earnings (£) | Annual Percentage Change (%) |
|---------------------|--------------|------------------------------|
| Edinburgh, City of | 583.8 | 4.3 |
| Bristol, City of | 539.9 | 3.0 |
| CARDIFF | 538.5 | 0.8 |
| Leeds | 536.6 | 1.6 |
| Newcastle upon Tyne | 532.5 | 4.6 |
| Sheffield | 524.0 | 3.9 |
| Birmingham | 523.0 | 5.7 |
| Glasgow City | 519.7 | -0.5 |
| Liverpool | 509.2 | 2.5 |
| Manchester | 479.1 | 1.6 |
| Nottingham | 450.6 | 0.5 |
| Wales | 505.9 | 1.3 |
| United Kingdom | 550.4 | 2.2 |

Source: Annual Survey of Hours and Earnings, ONS (provisional data for 2017)

Figure 8: Median Gross Weekly Earnings of Full-Time Workers, 2011-2017 (Resident Analysis)



Source: Annual Survey of Hours and Earnings, ONS (provisional data for 2017)

WORKPLACE ANALYSIS

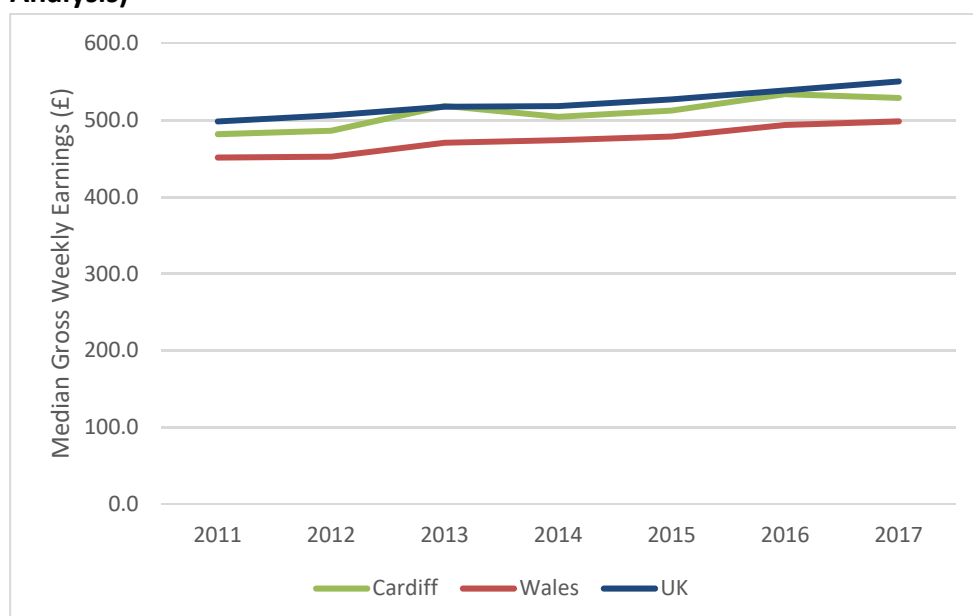
The gross weekly earnings of full-time workers working in Cardiff was £528.8 in 2017. In contrast to the resident analysis, this compared poorly with other major cities and was the only core city to see earnings fall since the previous year (see Table 4). In addition, it has predominantly been below the UK figure since 2011, with the gap between the two increasing over the year (see Figure 9).

Table 4: Median Gross Weekly Earnings of Full-Time Workers, 2017 (Workplace Analysis)

| Area | Earnings (£) | Annual Percentage Change (%) |
|---------------------|--------------|------------------------------|
| Edinburgh, City of | 598.5 | 5.1 |
| Manchester | 570.8 | 4.3 |
| Glasgow City | 560.8 | 2.6 |
| Newcastle upon Tyne | 554.2 | 6.8 |
| Birmingham | 549.4 | 1.0 |
| Bristol, City of | 545.3 | 1.6 |
| Leeds | 543.4 | 2.2 |
| Liverpool | 530.7 | 2.3 |
| CARDIFF | 528.8 | -0.9 |
| Sheffield | 526.6 | 2.9 |
| Nottingham | 494.8 | 3.1 |
| Wales | 498.4 | 1.0 |
| United Kingdom | 550.4 | 2.2 |

Source: Annual Survey of Hours and Earnings, ONS (provisional data for 2017)

Figure 9: Median Gross Weekly Earnings of Full-Time Workers, 2011-2017 (Workplace Analysis)



Source: Annual Survey of Hours and Earnings, ONS (provisional data for 2017)

GROSS DISPOSABLE HOUSEHOLD INCOME PER HEAD

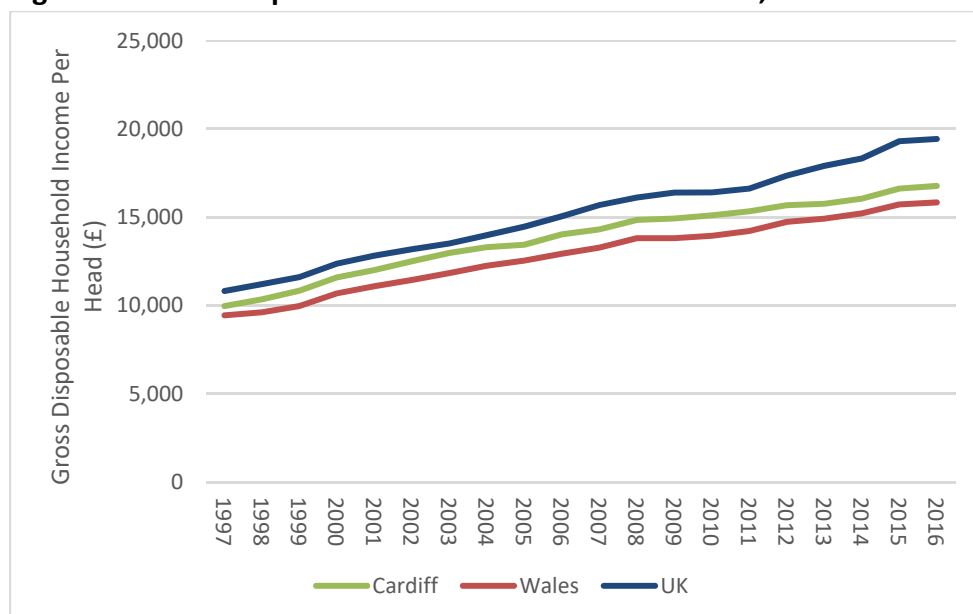
In 2016, Cardiff's gross disposable household income per head (£16,769) compared fairly well with other major cities (see Table 5). Since 1997, it has followed an upward trend and has consistently been above that of Wales. However, it has remained below the UK figure with the gap increasing over time (see Figure 10).

Table 5: Gross Disposable Household Income (GDHI) Per Head, 2016

| Area | GDHI Per Head (£) |
|---------------------|-------------------|
| Edinburgh, City of | 21,837 |
| Bristol, City of | 17,633 |
| Leeds | 16,814 |
| CARDIFF | 16,769 |
| Newcastle upon Tyne | 16,180 |
| Glasgow City | 15,311 |
| Sheffield | 15,057 |
| Liverpool | 14,538 |
| Birmingham | 14,093 |
| Manchester | 13,184 |
| Nottingham | 12,232 |
| Wales | 15,835 |
| United Kingdom | 19,432 |

Source: ONS (2016 figures are provisional)

Figure 10: Gross Disposable Household Income Per Head, 1997-2016



Source: ONS (2016 figures are provisional)

HOUSE PRICES

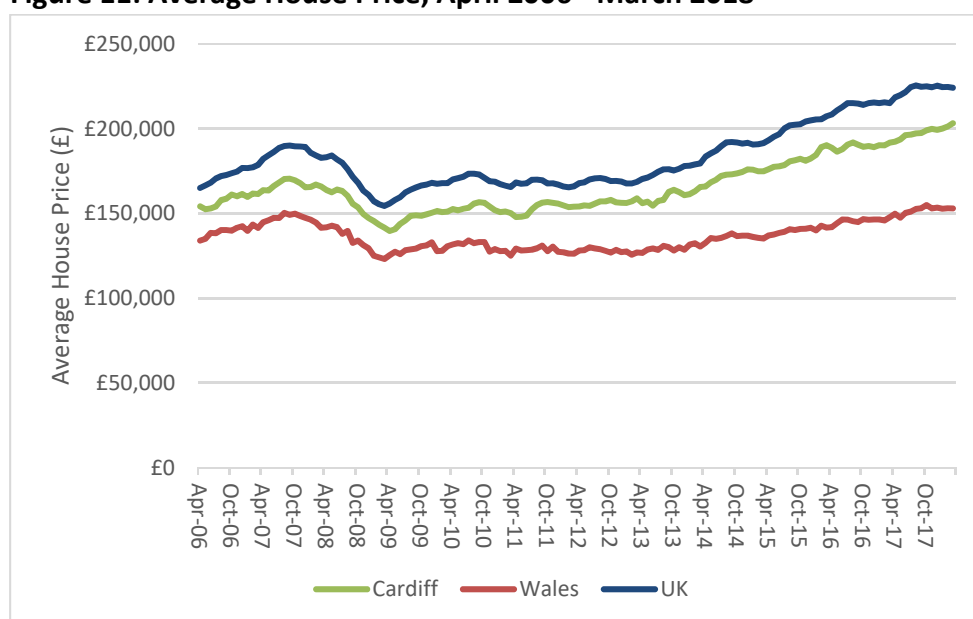
Cardiff's average house price in March 2018 (£203,219) was one of the highest amongst the UK's major cities (see Table 6), with its annual growth rate also exceeding the national average (5.98%). It has consistently been below the figure for the UK as a whole since April 2006 (see Figure 11). However, despite this, in March 2018, Cardiff had a higher average price than the UK for the majority of the property types, with the only exception being flats/maisonettes.

Table 6: Average House Price by Property Type, March 2018

| Area | All Property Types | | Detached | | Semi Detached | | Terraced | | Flat/ Maisonette | |
|---------------------|--------------------|-----------------|----------------|-----------------|----------------|-----------------|----------------|-----------------|------------------|-----------------|
| | Ave Price (£) | Annual % Change | Ave Price (£) | Annual % Change | Ave Price (£) | Annual % Change | Ave Price (£) | Annual % Change | Ave Price (£) | Annual % Change |
| City of Bristol | 273,393 | 4.90 | 506,051 | 5.27 | 327,822 | 6.06 | 276,918 | 5.41 | 222,845 | 3.63 |
| City of Edinburgh | 252,992 | 12.51 | 526,685 | 13.87 | 329,589 | 14.01 | 266,270 | 14.15 | 199,063 | 11.80 |
| CARDIFF | 203,219 | 5.98 | 379,722 | 6.43 | 231,123 | 6.84 | 190,643 | 6.32 | 143,084 | 4.38 |
| Birmingham | 177,643 | 6.39 | 335,479 | 6.75 | 198,189 | 6.84 | 158,760 | 6.65 | 131,090 | 5.13 |
| Leeds | 176,960 | 5.08 | 320,276 | 5.34 | 186,702 | 5.72 | 144,012 | 5.09 | 127,402 | 3.52 |
| Manchester | 169,598 | 5.94 | 300,636 | 6.41 | 204,849 | 6.97 | 155,702 | 6.43 | 152,960 | 4.78 |
| Newcastle upon Tyne | 158,758 | 5.00 | 301,282 | 5.46 | 179,908 | 5.63 | 153,385 | 5.69 | 113,175 | 3.30 |
| Sheffield | 157,617 | 6.04 | 273,316 | 6.10 | 169,407 | 6.60 | 135,197 | 6.20 | 109,350 | 4.52 |
| Liverpool | 134,245 | 12.54 | 257,975 | 13.34 | 160,583 | 13.61 | 114,488 | 12.48 | 109,910 | 11.05 |
| City of Nottingham | 132,618 | 4.14 | 223,022 | 3.92 | 144,157 | 4.69 | 112,113 | 4.41 | 105,753 | 2.78 |
| City of Glasgow | 124,032 | 7.72 | 299,450 | 9.09 | 169,272 | 9.27 | 144,792 | 9.04 | 107,755 | 7.14 |
| Wales | 152,999 | 3.52 | 234,077 | 4.32 | 146,545 | 3.56 | 117,210 | 2.87 | 110,764 | 3.06 |
| United Kingdom | 224,144 | 4.22 | 342,722 | 5.28 | 210,283 | 4.59 | 180,941 | 4.60 | 200,157 | 1.99 |

Source: House Price Index, Land Registry

Figure 11: Average House Price, April 2006 - March 2018



Source: House Price Index, Land Registry

HOUSING AFFORDABILITY

In 2017, Cardiff (6.67) had the second highest housing affordability ratio (i.e. median house price to median residence-based earnings) of the major cities in England & Wales, behind only Bristol, suggesting that it is one of the least affordable cities to live in (see Table 7). However, it was below the comparative figure for England & Wales (7.77), as has predominantly been the case since 2002, with the gap also increasing in recent years (see Figure 12).

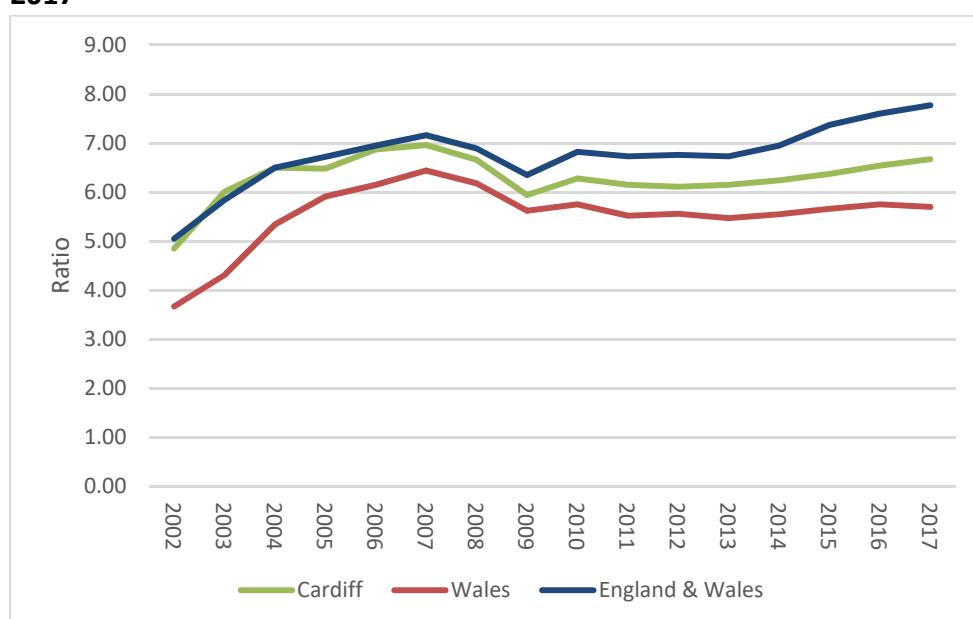
Table 7: Housing Affordability (Ratio of House Price to Residence-Based Earnings), 2017

| Area | Median House Price, Year ending Sep 17 (£) | Median Gross Annual Earnings, 2017 (£) | Ratio of Median House Price to Median Gross Annual Earnings |
|---------------------|--|--|---|
| Bristol, City of | 255,000 | 27,980 | 9.11 |
| CARDIFF | 185,000 | 27,739 | 6.67 |
| Manchester | 160,000 | 25,000 | 6.40 |
| Leeds | 168,000 | 27,834 | 6.04 |
| Birmingham | 161,000 | 26,686 | 6.03 |
| Newcastle upon Tyne | 155,998 | 26,655 | 5.85 |
| Sheffield | 150,000 | 26,952 | 5.57 |
| Nottingham | 130,000 | 23,503 | 5.53 |
| Liverpool | 124,000 | 25,863 | 4.79 |
| Wales | 150,000 | 26,327 | 5.70 |
| England & Wales | 225,000 | 28,952 | 7.77 |

Source: ONS

NB: House price data are taken from ONS House Price Statistics for Small Areas for the year ending September. Earnings data are taken from the Annual Survey of Hours and Earnings and are estimates of gross residence-based individual full-time annual earnings where available.

Figure 12: Housing Affordability (Ratio of House Price to Residence-Based Earnings), 2002-2017



Source: ONS

GROSS VALUE ADDED (GVA)

In 2016, Cardiff (£9,933m) accounted for 17% of the total gross value added (GVA) for Wales, with its GVA growing at a faster rate (5.7%) than both Wales and the UK over the year (see Table 8). In terms of GVA per head, Cardiff (£27,480) was only a mid-table performer across the major cities, with the figure for Edinburgh over 40% higher at £39,321, although its rate of growth over the year again compared favourably with the other areas (see Table 9).

Table 8: Gross Value Added (Balanced) (£million), 2016

| Area | 2016 | Annual % Change |
|---------------------|---------------|-----------------|
| Birmingham | £25,720 | 4.3 |
| Leeds | £21,951 | 2.2 |
| Glasgow City | £20,371 | 3.5 |
| City of Edinburgh | £19,942 | 4.6 |
| Manchester | £18,172 | 5.4 |
| Bristol, City of | £14,313 | 4.7 |
| Sheffield | £11,433 | 1.4 |
| Liverpool | £11,334 | 0.6 |
| CARDIFF | £9,933 | 5.7 |
| Nottingham | £8,911 | 4.4 |
| Newcastle upon Tyne | £7,802 | 2.1 |
| Wales | £59,585 | 4.0 |
| United Kingdom | £1,747,647 | 3.7 |

Source: ONS (2016 figures are provisional)

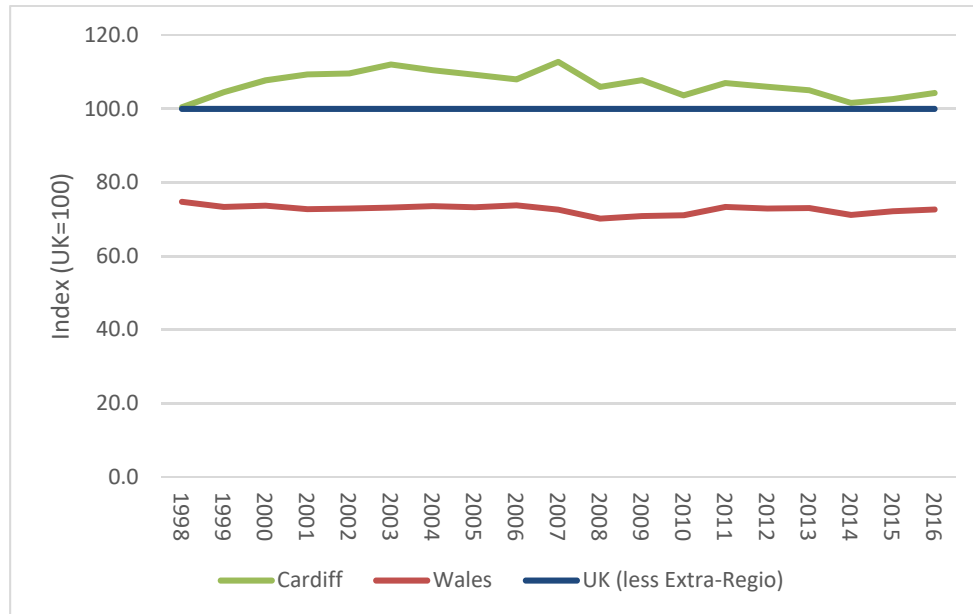
Table 9: Gross Value Added (Balanced) Per Head of Population (£), 2016

| Area | 2016 | Annual % Change |
|---------------------|----------------|-----------------|
| City of Edinburgh | £39,321 | 2.9 |
| Manchester | £33,573 | 3.2 |
| Glasgow City | £33,120 | 2.0 |
| Bristol, City of | £31,513 | 3.6 |
| Leeds | £28,079 | 1.2 |
| CARDIFF | £27,480 | 4.5 |
| Nottingham | £27,393 | 2.3 |
| Newcastle upon Tyne | £26,317 | 0.8 |
| Liverpool | £23,389 | -0.6 |
| Birmingham | £22,871 | 3.0 |
| Sheffield | £19,870 | 0.4 |
| Wales | £19,140 | 3.5 |
| United Kingdom | £26,621 | 2.9 |

Source: ONS (2016 figures are provisional)

Figure 13 shows that Cardiff's GVA per head has consistently exceeded the UK average since 1998. Although the gap gradually declined following a 2007-peak, in recent years it has again diverged away from the national figure.

Figure 13: GVA Per Head (Balanced) Index, 1998-2016 (UK = 100)



Source: ONS (2016 figures are provisional)

NB. UK figure is for United Kingdom less Extra-Regio.

GVA by industry for 2016 can be seen in Table 10. This shows that Public administration; education; health is the greatest contributor to Cardiff GVA, accounting for over a quarter (28.3%) of the total.

Compared to other major UK cities, a relatively high proportion of Cardiff's GVA comes from Agriculture, mining, electricity, gas, water & waste (5.2%) and Financial & insurance activities (11.7%). Conversely, the contributions of Distribution; transport; accommodation & food (13.3%), Information & communication (4.4%), and Real estate activities (10.3%) are comparatively low in the city.

Table 10: Gross Value Added (Balanced) by Industry (£million), 2016

| Industry (SIC07) | CARDIFF | | Birmingham (%) | Bristol, City of (%) | City of Edinburgh (%) | Glasgow City (%) | Leeds (%) | Liverpool (%) | Manchester (%) | Newcastle upon Tyne (%) | Nottingham (%) | Sheffield (%) | Wales (%) | United Kingdom (%) |
|---|--------------|------|----------------|----------------------|-----------------------|------------------|-----------|---------------|----------------|-------------------------|----------------|---------------|-----------|--------------------|
| | No. | % | | | | | | | | | | | | |
| Agriculture, mining, electricity, gas, water & waste (ABDE) | 516 | 5.2 | 2.1 | 2.9 | 3.2 | 4.6 | 3.6 | 1.2 | 0.7 | 1.3 | 4.9 | 1.9 | 4.7 | 4.5 |
| Manufacturing (C) | 666 | 6.7 | 11.1 | 5.2 | 3.0 | 6.6 | 8.1 | 6.0 | 4.3 | 6.5 | 5.6 | 10.7 | 18.0 | 10.1 |
| Construction (F) | 420 | 4.2 | 5.0 | 5.0 | 2.6 | 5.0 | 5.8 | 4.1 | 2.9 | 4.5 | 3.9 | 5.3 | 5.9 | 6.2 |
| Distribution; transport; accommodation & food (GHI) | 1,323 | 13.3 | 16.8 | 17.7 | 16.3 | 14.6 | 16.6 | 20.4 | 20.3 | 17.3 | 20.6 | 17.8 | 16.1 | 18.4 |
| Information & communication (J) | 434 | 4.4 | 3.9 | 5.8 | 5.2 | 6.7 | 6.2 | 6.1 | 6.5 | 6.3 | 6.7 | 5.7 | 2.8 | 6.1 |
| Financial & insurance activities (K) | 1,167 | 11.7 | 8.9 | 9.4 | 20.3 | 8.5 | 9.3 | 6.1 | 10.3 | 7.0 | 2.6 | 5.2 | 4.3 | 6.6 |
| Real estate activities (L) | 1,025 | 10.3 | 11.2 | 10.7 | 11.4 | 12.9 | 11.6 | 12.5 | 11.3 | 10.8 | 8.4 | 11.1 | 12.2 | 13.9 |
| Professional & administrative services (MN) | 1,173 | 11.8 | 12.6 | 16.5 | 12.2 | 12.7 | 14.9 | 10.0 | 16.8 | 9.9 | 15.1 | 9.8 | 7.0 | 12.3 |
| Public administration; education; health (OPQ) | 2,811 | 28.3 | 24.1 | 23.6 | 22.1 | 24.4 | 20.4 | 29.8 | 22.9 | 30.0 | 28.9 | 29.5 | 25.3 | 17.7 |
| Recreation, other services & household activities (RST) | 398 | 4.0 | 4.5 | 3.2 | 3.8 | 4.0 | 3.5 | 3.9 | 4.1 | 6.4 | 3.4 | 3.1 | 3.6 | 4.2 |
| Agriculture, mining, electricity, gas, water & waste (ABDE) | 516 | 5.2 | 2.1 | 2.9 | 3.2 | 4.6 | 3.6 | 1.2 | 0.7 | 1.3 | 4.9 | 1.9 | 4.7 | 4.5 |
| Total GVA (£m) | 9,333 | | 25,720 | 14,313 | 19,942 | 20,371 | 21,951 | 11,334 | 18,172 | 7,802 | 8,911 | 11,433 | 59,585 | 1,747,647 |

Source: ONS (Figures are provisional).

PRODUCTIVITY

In 2016, the GVA per hour worked was £28.8 for Cardiff and Vale of Glamorgan. This was only 88.5% of the UK figure and made it a mid-level performer across the major UK NUTS3 areas (see Table 11). GVA per filled job (£45,157) for 2016 compared even less favourably with it only exceeding the Nottingham, Sheffield, and Tyneside regions, and was just 85.8% of the UK figure.

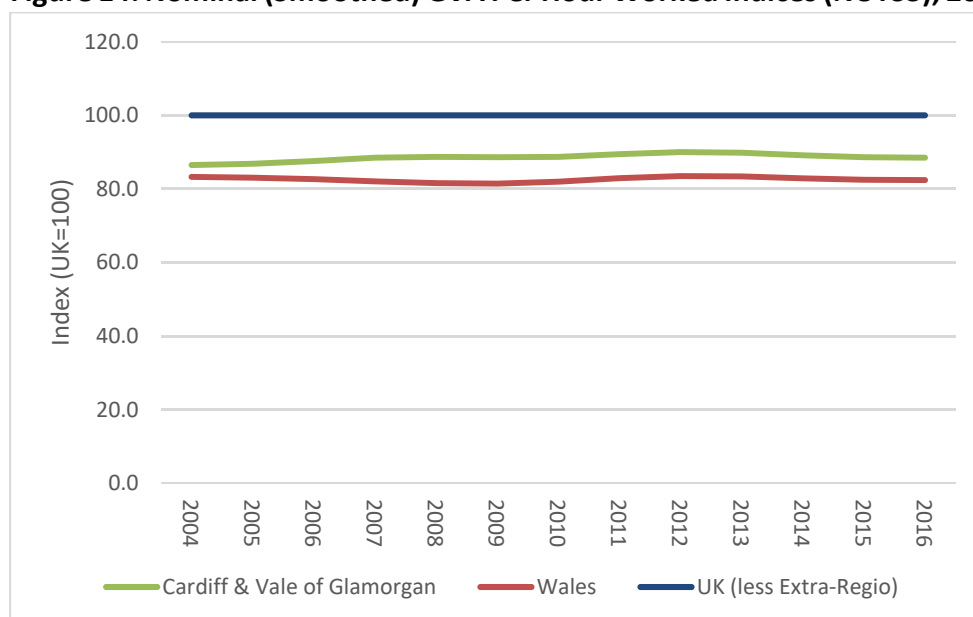
Table 11: Nominal (Smoothed) GVA Per Hour Worked and Per Filled Job (NUTS 3), 2016

| Region (NUTS3) | GVA Per Hour Worked | | GVA Per Filled Job | |
|--|---------------------|----------------|--------------------|----------------|
| | £ | Index (UK=100) | £ | Index (UK=100) |
| Birmingham | 28.1 | 86.3 | 46,777 | 88.9 |
| Bristol, City of | 31.0 | 95.1 | 49,652 | 94.4 |
| CARDIFF & VALE OF GLAMORGAN | 28.8 | 88.5 | 45,157 | 85.8 |
| Edinburgh, City of | 36.6 | 112.3 | 58,704 | 111.6 |
| Glasgow City | 30.5 | 93.6 | 48,156 | 91.5 |
| Leeds | 29.0 | 88.9 | 47,293 | 89.9 |
| Liverpool | 28.3 | 86.9 | 45,201 | 85.9 |
| Manchester | 28.2 | 86.5 | 46,026 | 87.5 |
| Nottingham | 23.9 | 73.4 | 38,193 | 72.6 |
| Sheffield | 26.9 | 82.4 | 41,991 | 79.8 |
| Tyneside | 28.2 | 86.5 | 44,435 | 84.4 |
| Wales | 26.9 | 82.4 | 42,322 | 80.4 |
| United Kingdom (less Extra-Regio) | 32.6 | 100.0 | 52,626 | 100.0 |

Source: ONS

NB: Data are nominal (i.e. not adjusted for inflation) and smoothed using a weighted 5-year moving average.

Figure 14: Nominal (Smoothed) GVA Per Hour Worked Indices (NUTS3), 2004-2016 (UK=100)

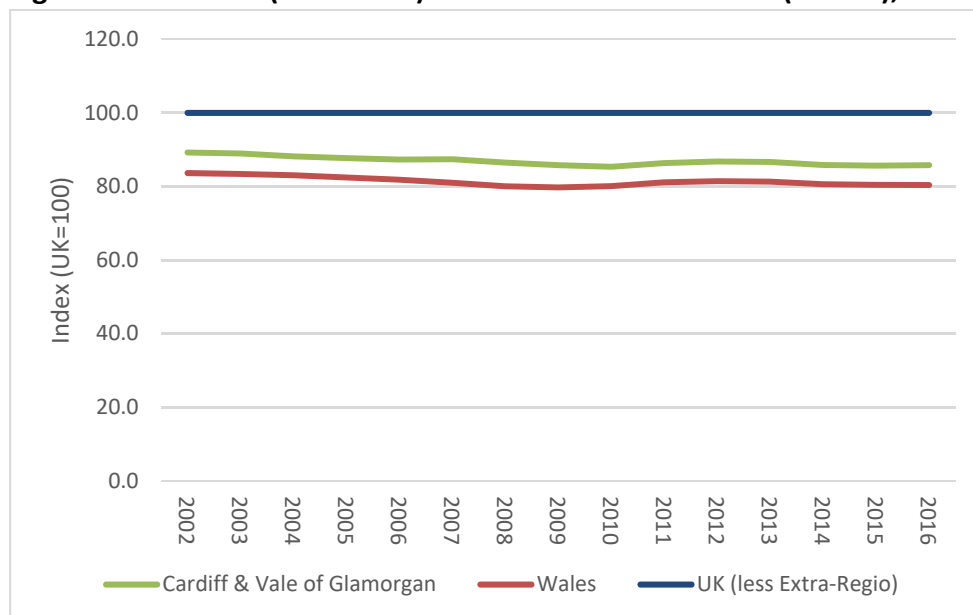


Source: ONS

NB: Data are nominal (i.e. not adjusted for inflation) and smoothed using a weighted 5-year moving average.

Figures 14 and 15 show that both GVA per hour worked and GVA per filled job for Cardiff and Vale of Glamorgan have consistently compared poorly against the equivalent UK figures, although they have performed better than Wales as a whole.

Figure 15: Nominal (Smoothed) GVA Per Filled Job Indices (NUTS3), 2002-2016 (UK=100)



Source: ONS

NB: Data are nominal (i.e. not adjusted for inflation) and smoothed using a weighted 5-year moving average.

Information at the city region level indicates that Cardiff's city region also performs poorly. In 2016, GVA per hour worked was just 86.5% of the UK figure, while GVA per job filled (84.8% of the UK figure) only exceeded Sheffield City Region (see Table 12).

Table 12: GVA Per Hour Worked and Per Filled Job Indices – City Regions, 2016 (UK=100)

| City Region | GVA Per Hour Worked Index (UK=100) | GVA Per Job Filled Index (UK=100) |
|-------------------------------|------------------------------------|-----------------------------------|
| Aberdeen | 111.4 | 116.7 |
| Cambridgeshire & Peterborough | 96.7 | 95.5 |
| CARDIFF | 88.4 | 84.8 |
| Edinburgh | 104.5 | 102.8 |
| Glasgow | 95.1 | 92.7 |
| Greater Manchester | 89.8 | 89.2 |
| Liverpool City Region | 92.1 | 90.6 |
| London | 133.7 | 141.8 |
| North East | 87.6 | 85.6 |
| Sheffield City Region | 80.8 | 78.7 |
| Tees Valley | 91.1 | 88.2 |
| West Midlands | 86.8 | 88.1 |
| West of England | 102.1 | 99.8 |
| West Yorkshire | 86.8 | 86.0 |

Source: ONS

EMPLOYMENT RATE (AGED 16-64)

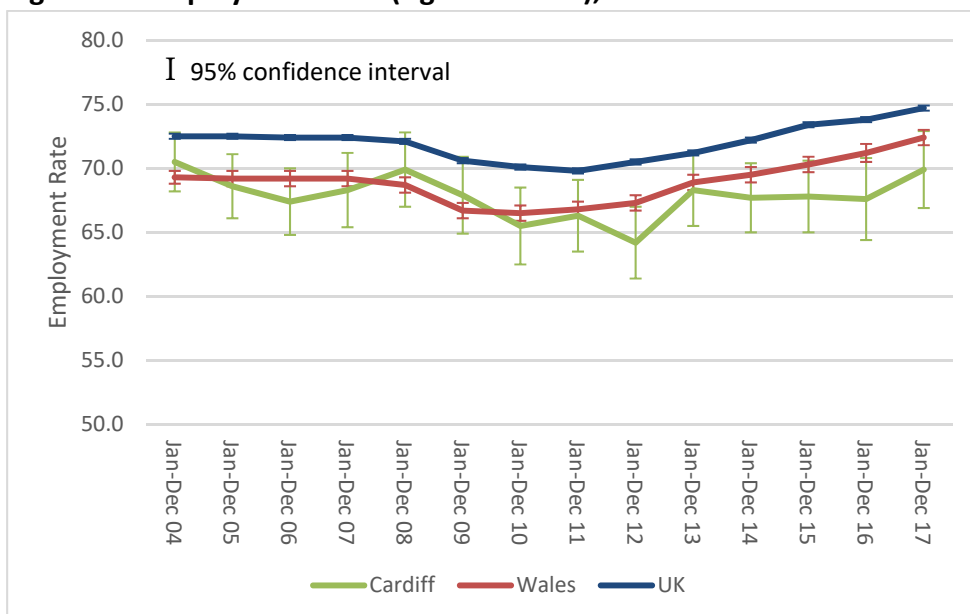
Over two-thirds (69.9%) of Cardiff's population aged 16-64 are in employment; the fifth highest rate amongst the core cities and Edinburgh (see Table 13). However, it has consistently compared poorly with the UK figure and in recent years has also been below that of Wales (see Figure 16), although this can be partly explained by the large student population in the city.

Table 13: Employment Rate (Aged 16 to 64), Jan – Dec 2017

| Area | Employment Rate (%) |
|---------------------|---------------------|
| Bristol, City of | 78.2 |
| Leeds | 76.6 |
| Edinburgh, City of | 75.7 |
| Sheffield | 70.7 |
| CARDIFF | 69.9 |
| Manchester | 67.5 |
| Liverpool | 67.1 |
| Newcastle upon Tyne | 66.6 |
| Glasgow City | 66.0 |
| Birmingham | 63.6 |
| Nottingham | 57.4 |
| Wales | 72.4 |
| United Kingdom | 74.7 |

Source: Annual Population Survey, ONS

Figure 16: Employment Rate (Aged 16 to 64), Jan-Dec 2004 to Jan-Dec 2017



Source: Annual Population Survey, ONS

PRIVATE V PUBLIC SECTOR EMPLOYMENT

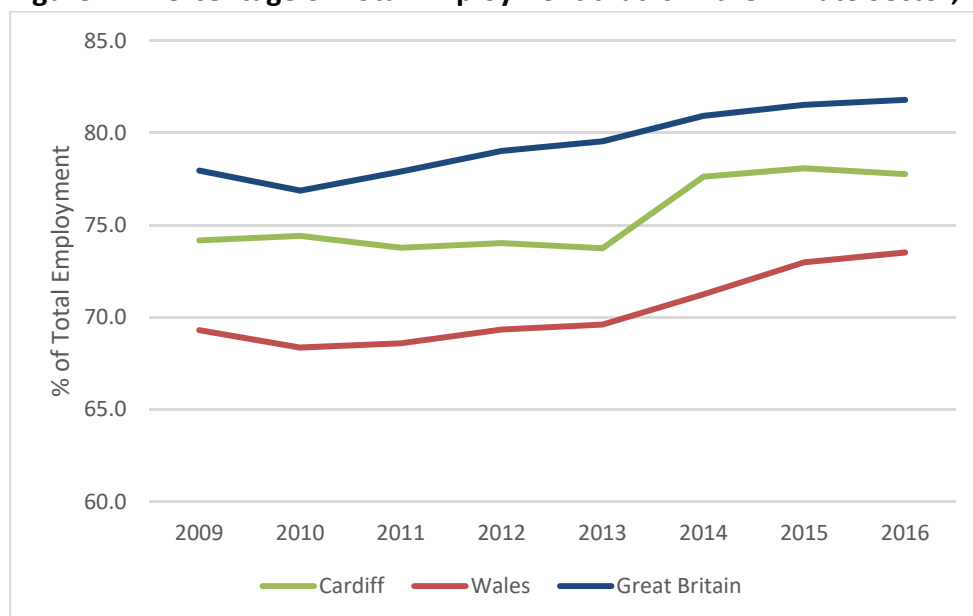
In 2016, more than three-quarters (77.8%) of employment in Cardiff was in the private sector (see Table 14). As has been the case since 2009 (see Figure 17), this exceeded the figure for Wales (73.5%) but was below that of Great Britain (81.8%).

Table 14: Private v Public Sector Employment, 2016

| Area | % Private Sector | % Public Sector |
|---------------------|------------------|-----------------|
| Leeds | 82.6 | 17.4 |
| Manchester | 82.6 | 17.4 |
| Nottingham | 82.1 | 17.9 |
| Bristol, City of | 81.9 | 18.1 |
| Sheffield | 79.8 | 20.2 |
| CARDIFF | 77.8 | 22.2 |
| Glasgow City | 77.6 | 22.4 |
| Birmingham | 77.5 | 22.5 |
| Edinburgh, City of | 77.5 | 22.5 |
| Liverpool | 75.7 | 24.3 |
| Newcastle upon Tyne | 74.7 | 25.3 |
| Wales | 73.5 | 26.5 |
| Great Britain | 81.8 | 18.2 |

Source: Business Register & Employment Survey, ONS

Figure 17: Percentage of Total Employment that is in the Private Sector, 2009-2016



Source: Business Register & Employment Survey, ONS

NB. Figures for 2009 to 2014 exclude units registered for PAYE only

FULL-TIME V PART-TIME EMPLOYEES

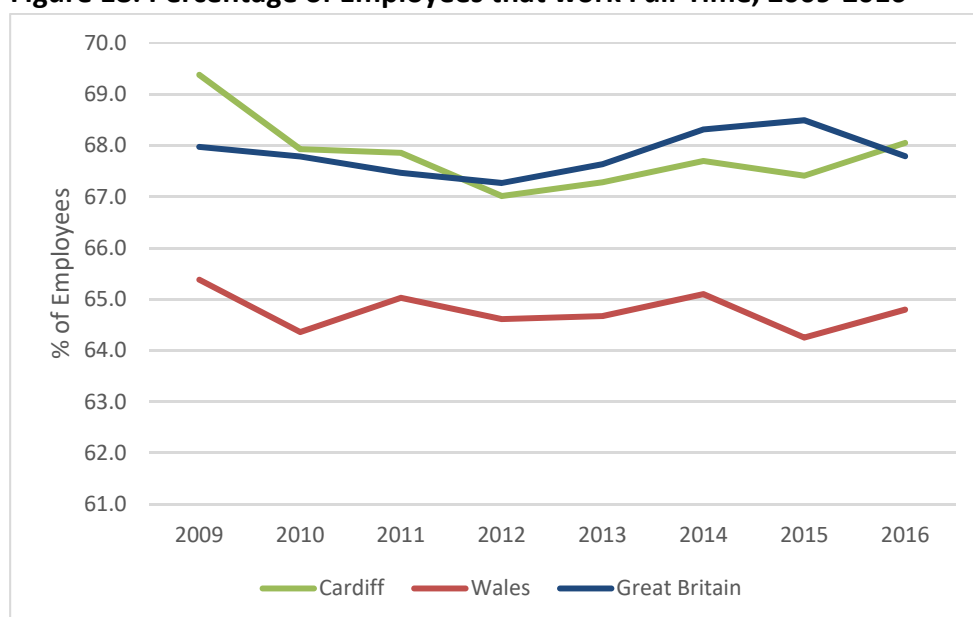
Over two-thirds (68.1%) of Cardiff's employees worked full-time in 2016 (see Table 15). Figure 18 shows that this proportion has increased in recent years. This followed a post-recession decline from 2009 to 2012, which caused the Cardiff figure to fall below that of Great Britain, where it remained until 2016. However, it has consistently exceeded the proportion for Wales.

Table 15: Full-Time v Part-Time Employees, 2016

| Area | % Full-Time | % Part-Time |
|---------------------|-------------|-------------|
| Manchester | 69.9 | 30.1 |
| Leeds | 69.7 | 30.3 |
| Birmingham | 69.3 | 30.7 |
| Edinburgh, City of | 68.8 | 31.2 |
| Bristol, City of | 68.5 | 31.5 |
| CARDIFF | 68.1 | 31.9 |
| Nottingham | 67.1 | 32.9 |
| Glasgow City | 66.8 | 33.2 |
| Newcastle upon Tyne | 66.2 | 33.8 |
| Sheffield | 64.9 | 35.1 |
| Liverpool | 63.9 | 36.1 |
| Wales | 64.8 | 35.2 |
| Great Britain | 67.8 | 32.2 |

Source: Business Register & Employment Survey, ONS

Figure 18: Percentage of Employees that work Full-Time, 2009-2016



Source: Business Register & Employment Survey, ONS

NB. Figures for 2009 to 2014 exclude units registered for PAYE only

EMPLOYMENT BY BROAD INDUSTRIAL SECTOR

In 2016, there were 211,000 people in employment in Cardiff with the Health (14.2%), Education (10.4%), Business administration & support services (10.4%), and Retail (10.0%) industrial sectors each accounting for at least a tenth of this (see Table 16).

Compared to other major UK cities, Cardiff had a relatively high proportion working in Mining, quarrying & utilities (2.1%), Retail (10.0%), Public administration & defence (7.1%), and Financial & insurance (5.7%).

In contrast, Cardiff had a comparatively low proportion working in the Transport & storage (2.4%), and Professional, scientific & technical (6.6%) sectors.

Table 16: Employment by Broad Industrial Sector, 2016

| Industry (SIC 2007) | CARDIFF | | Birmingham (%) | Bristol, City of (%) | Edinburgh, City of (%) | Glasgow City (%) | Leeds (%) | Liverpool (%) | Manchester (%) | Newcastle upon Tyne (%) | Nottingham (%) | Sheffield (%) | Wales (%) | Great Britain (%) |
|--|------------|------|----------------|----------------------|------------------------|------------------|-----------|---------------|----------------|-------------------------|----------------|---------------|-----------|-------------------|
| | No. | % | | | | | | | | | | | | |
| Agriculture, forestry & fishing (A)* | 600 | 0.3 | 0.0 | 0.0 | 0.1 | 0.0 | 0.1 | 0.0 | 0.0 | 0.1 | 0.0 | 0.1 | 4.5 | 1.6 |
| Mining, quarrying & utilities (B,D,E) | 4,500 | 2.1 | 0.5 | 0.9 | 1.0 | 1.2 | 1.8 | 0.5 | 0.3 | 0.1 | 1.8 | 0.7 | 1.5 | 1.2 |
| Manufacturing (C) | 9,000 | 4.3 | 7.5 | 4.2 | 2.4 | 4.3 | 5.9 | 4.1 | 3.4 | 4.4 | 4.5 | 7.7 | 10.8 | 7.9 |
| Construction (F) | 8,000 | 3.8 | 3.1 | 4.2 | 2.7 | 4.0 | 4.7 | 2.4 | 2.1 | 2.2 | 2.7 | 3.8 | 5.5 | 4.7 |
| Motor trades (Part G) | 3,000 | 1.4 | 1.5 | 2.3 | 1.0 | 1.4 | 1.6 | 0.9 | 0.4 | 1.4 | 1.1 | 1.9 | 1.8 | 1.8 |
| Wholesale (Part G) | 6,000 | 2.8 | 4.1 | 4.5 | 1.8 | 2.4 | 4.1 | 2.8 | 2.6 | 1.4 | 2.7 | 4.6 | 2.9 | 3.9 |
| Retail (Part G) | 21,000 | 10.0 | 8.9 | 7.9 | 8.4 | 8.3 | 7.2 | 9.3 | 9.2 | 8.8 | 11.2 | 10.0 | 9.9 | 9.5 |
| Transport & storage (inc postal) (H) | 5,000 | 2.4 | 4.6 | 4.5 | 3.3 | 3.1 | 4.5 | 6.1 | 7.1 | 3.8 | 2.7 | 3.5 | 2.8 | 4.8 |
| Accommodation & food services (I) | 17,000 | 8.1 | 6.4 | 6.0 | 9.0 | 6.7 | 5.6 | 9.8 | 8.9 | 9.3 | 5.8 | 5.8 | 8.8 | 7.4 |
| Information & communication (J) | 8,000 | 3.8 | 2.5 | 4.9 | 5.1 | 4.3 | 4.7 | 2.4 | 3.7 | 4.9 | 4.0 | 3.5 | 2.3 | 4.1 |
| Financial & insurance (K) | 12,000 | 5.7 | 4.3 | 6.8 | 10.8 | 5.5 | 5.2 | 4.1 | 5.5 | 3.3 | 1.8 | 3.5 | 2.1 | 3.5 |
| Property (L) | 4,000 | 1.9 | 1.7 | 1.7 | 1.8 | 2.1 | 1.6 | 1.8 | 2.4 | 2.2 | 1.3 | 1.3 | 1.5 | 1.7 |
| Professional, scientific & technical (M) | 14,000 | 6.6 | 9.3 | 10.2 | 9.3 | 7.8 | 10.8 | 7.7 | 13.1 | 7.7 | 6.3 | 7.7 | 4.1 | 8.7 |
| Business administration & support services (N) | 22,000 | 10.4 | 8.5 | 9.8 | 7.2 | 12.8 | 12.4 | 7.3 | 11.8 | 7.1 | 22.4 | 8.1 | 6.4 | 8.8 |
| Public administration & defence (O) | 15,000 | 7.1 | 4.8 | 3.8 | 6.0 | 5.2 | 3.2 | 6.5 | 3.9 | 8.8 | 4.9 | 5.0 | 6.4 | 4.2 |
| Education (P) | 22,000 | 10.4 | 11.0 | 9.4 | 9.0 | 7.4 | 9.0 | 10.2 | 10.0 | 11.0 | 9.9 | 12.7 | 9.5 | 8.6 |
| Health (Q) | 30,000 | 14.2 | 16.2 | 15.5 | 15.0 | 18.1 | 12.6 | 18.3 | 12.1 | 17.0 | 13.5 | 16.2 | 15.3 | 13.0 |
| Arts, entertainment, recreation & other services (R,S,T,U) | 10,000 | 4.7 | 4.8 | 3.8 | 6.0 | 4.8 | 4.7 | 5.3 | 3.4 | 6.6 | 3.1 | 4.2 | 4.0 | 4.6 |
| Total no. in employment (thousands)* | 211 | | 517 | 265 | 334 | 421 | 443 | 246 | 381 | 182 | 223 | 260 | 1,332 | 30,305 |

Source: Business Register & Employment Survey (Open Access), Nomis, ONS

* These figures for local authorities and Wales exclude farm agriculture (SIC subclass 01000).

EMPLOYMENT IN WELSH GOVERNMENT PRIORITY SECTORS

Three-fifths (60.3%) of Cardiff's local units and almost half (47.9%) of those in employment in the city are in one of Welsh Government's priority sectors (see Table 17). Financial and Professional Services (19.0% of total employment) is by far the largest of these in Cardiff with it accounting for almost a third of the sector's total employment in Wales. Creative Industries (7.1%) are also more prevalent in the city, with Cardiff again responsible for around a third of Wales's total employment in the sector.

In contrast, Cardiff is poorly represented by the Advanced materials/manufacturing priority sector. It accounts for only 2.5% of total employment in the city compared with 6.2% for Wales.

Table 17: Employment by Welsh Government Priority Sector, 2016

| Priority Sector | Local Units | | | | Employment (thousands) | | | |
|------------------------------------|---------------|--------------|----------------|--------------|------------------------|--------------|----------------|--------------|
| | CARDIFF | | Wales | | CARDIFF | | Wales | |
| | No. | % | No. | % | No. | % | No. | % |
| Advanced materials / manufacturing | 245 | 1.7 | 3,135 | 2.6 | 5.6 | 2.5 | 83.9 | 6.2 |
| Construction | 1,395 | 9.7 | 13,955 | 11.4 | 13.9 | 6.1 | 110.5 | 8.2 |
| Creative industries | 1,300 | 9.0 | 5,820 | 4.8 | 16.1 | 7.1 | 48.6 | 3.6 |
| Energy & environment | 2,150 | 14.9 | 18,250 | 14.9 | 25.3 | 11.2 | 155.8 | 11.6 |
| Food & Farming | 70 | 0.5 | 14,205 | 11.6 | 1.6 | 0.7 | 50.6 | 3.8 |
| Financial & professional services | 4,525 | 31.4 | 24,370 | 19.9 | 43.1 | 19.0 | 136.8 | 10.2 |
| ICT | 700 | 4.9 | 3,890 | 3.2 | 5.6 | 2.5 | 26.6 | 2.0 |
| Life sciences | 70 | 0.5 | 355 | 0.3 | 3.4 | 1.5 | 17.2 | 1.3 |
| Tourism | 1,570 | 10.9 | 13,690 | 11.2 | 21.3 | 9.4 | 131.2 | 9.8 |
| <i>In A Priority Sector</i> | 8,695 | 60.3 | 75,310 | 61.5 | 108.6 | 47.9 | 604.1 | 45.0 |
| <i>Not In A Sector</i> | 5,730 | 39.7 | 47,090 | 38.5 | 118.3 | 52.1 | 738.6 | 55.0 |
| Total | 14,425 | 100.0 | 122,400 | 100.0 | 226.9 | 100.0 | 1,342.6 | 100.0 |

Source: Welsh Government

NB. Local units are individual sites of an enterprise.

The priority sector totals will not equal the sum of the individual priority sectors as there is overlap between several sectors.

OCCUPATION

More than a quarter of Cardiff residents that are in employment work in Professional occupations (26.4%), exceeding the equivalent proportions for both Wales and the UK (see Table 18). This is also the case for the Associate professional & technical; Administrative & secretarial; and Sales & customer service occupations.

Compared with other major UK cities, Cardiff has a relatively high proportion of Administrative & secretarial occupations (13.0%), Associate professional & technical (18.7%), and Professional occupations (26.4%). In contrast, it has a comparatively low percentage of Skilled trades occupations (5.8%), Caring, leisure & other service occupations (7.0%), Elementary occupations (8.7%), Managers, directors & senior officials (7.4%), and Process, plant & machine operatives (4.0%).

Table 18: Occupation of those in Employment, Jan – Dec 2017

| Occupation (SOC 2010) | CARDIFF | | Birmingham (%) | Bristol, City of (%) | Edinburgh, City of (%) | Glasgow City (%) | Leeds (%) |
|---|---------------|----------------|-------------------------|----------------------|------------------------|------------------|--------------------|
| | No. | % | | | | | |
| Managers, directors & senior officials | 12,800 | 7.4 | 9.5 | 9.4 | 7.1 | 8.5 | 9.0 |
| Professional occupations | 45,800 | 26.4 | 19.2 | 28.9 | 32.0 | 24.1 | 21.5 |
| Associate prof & tech occupations | 32,400 | 18.7 | 13.0 | 19.8 | 17.1 | 15.3 | 13.2 |
| Administrative & secretarial occupations | 22,600 | 13.0 | 10.1 | 8.3 | 10.3 | 9.3 | 9.3 |
| Skilled trades occupations | 10,100 | 5.8 | 8.9 | 6.6 | 6.6 | 7.7 | 10.9 |
| Caring, leisure & other service occupations | 12,100 | 7.0 | 8.2 | 8.1 | 6.4 | 8.8 | 10.3 |
| Sales & customer service occupations | 14,700 | 8.5 | 8.1 | 6.7 | 8.1 | 7.4 | 8.6 |
| Process, plant & machine operatives | 7,000 | 4.0 | 8.7 | 3.4 | 2.2 | 4.9 | 5.3 |
| Elementary occupations | 15,100 | 8.7 | 13.5 | 8.5 | 9.5 | 13.4 | 11.3 |
| Occupation (SOC 2010) | Liverpool (%) | Manchester (%) | Newcastle upon Tyne (%) | Nottingham (%) | Sheffield (%) | Wales (%) | United Kingdom (%) |
| Managers, directors & senior officials | 9.4 | 6.5 | 7.9 | 7.7 | 9.2 | 9.2 | 10.8 |
| Professional occupations | 21.6 | 19.6 | 24.5 | 17.3 | 24.6 | 18.1 | 20.2 |
| Associate prof & tech occupations | 15.0 | 13.7 | 10.4 | 14.2 | 12.6 | 12.8 | 14.3 |
| Administrative & secretarial occupations | 8.4 | 9.4 | 10.8 | 10.3 | 9.9 | 10.7 | 10.4 |
| Skilled trades occupations | 8.3 | 9.0 | 9.7 | 8.6 | 9.9 | 11.8 | 10.4 |
| Caring, leisure & other service occupations | 9.3 | 12.3 | 9.1 | 9.7 | 8.8 | 10.0 | 9.1 |
| Sales & customer service occupations | 7.8 | 9.5 | 8.9 | 6.6 | 8.6 | 8.0 | 7.5 |
| Process, plant & machine operatives | 6.3 | 5.2 | 4.3 | 9.4 | 4.7 | 7.4 | 6.4 |
| Elementary occupations | 13.3 | 14.4 | 13.9 | 16.0 | 11.3 | 11.5 | 10.5 |

Source: Annual Population Survey, ONS

MAJOR EMPLOYERS

Details of Cardiff companies that feature in Wales Online's Top 300 largest companies for 2017 can be seen in Table 19.

Table 19: Cardiff Companies Featuring in Wales Online's Top 300 Largest Companies, 2017

| Rank | Company | Activity | Latest Turnover | No. Employees |
|------|---|--|-----------------|---------------|
| 2 | Admiral Group Plc | Non-life insurance | £2,580m | 8,598 |
| 3 | GE Aircraft Engine Services Ltd | Manufacture of air and spacecraft and related machinery | £2,364m | 1,205 |
| 11 | Celsa (UK) Holdings Ltd | Manufacture of basic iron and steel and of ferro-alloys | £436m | 1,240 |
| 18 | Motonovo Finance | Provider of a range of financial services through motor dealers across the UK | £321m | 667 |
| 20 | Finsbury Food Group Plc | Manufacture of bread; manufacture of fresh pastry goods and cakes | £314m | 3,162 |
| 22 | Arriva Trains Wales/Trenau Arriva Cymru Ltd | Passenger rail transport, interurban | £279m | 2,123 |
| 24 | Western Power Distribution Ltd | Distribution of electricity | £251m | 1,037 |
| 28 | Principality Building Society | Building society | £229m | 1,134 |
| 29 | Panasonic Manufacturing U.K. Ltd. | Manufacture of computers and peripheral equipment | £228m | 384 |
| 35 | GMAC UK Plc | Other financial service activities, except insurance and pension funding, (not including security dealing on own account and factoring) n.e.c. | £197m | 469 |
| 48 | SA Brain & Co | Public houses and bars | £135m | 2,437 |
| 50 | IQE Plc | Manufacture of electronic components | £133m | 475 |
| 56 | Hodge Ltd | Banks | £117m | 130 |
| 65 | Wellington B Ltd | Other business support service activities n.e.c. | £103m | 234 |
| 73 | Shaw Healthcare (Group) Ltd | Residential nursing care activities | £93m | 3,460 |
| 83 | PCI Penn UK Holdco Ltd | Manufacture of basic pharmaceutical products | £82m | 734 |
| 85 | CMC UK Ltd | Wholesale of metals and metal ores | £82m | 37 |
| 92 | Welsh Rugby Union | Activities of sport clubs | £75m | 240 |
| 94 | Virtusa UK Ltd | Computer consultancy activities | £75m | 115 |
| 99 | Monument Chemicals UK Ltd | Manufacture of other inorganic basic chemicals | £71m | 102 |

| Rank | Company | Activity | Latest Turnover | No. Employees |
|------|--|--|-----------------|---------------|
| 101 | Castleoak Holdings Ltd | Construction of commercial buildings | £70m | 165 |
| 103 | Penarth Commercial Properties (Holdings) Ltd | Sawmilling and planing of wood | £69m | 237 |
| 107 | Global Foods Ltd | Wholesale of wine, beer, spirits and other alcoholic beverages | £66m | 109 |
| 110 | Royal Voluntary Service | Retail sale in non-specialised stores with food, beverages or tobacco predominating | £64m | 1,283 |
| 112 | Target Group Ltd | Business and domestic software development | £64m | 849 |
| 114 | Rightcares Property Co Ltd | Development of building projects | £62m | 9 |
| 119 | Abbey Garages (Cardiff) Ltd | Sale of new cars and light motor vehicles | £58m | 134 |
| 121 | Carter Lauren Construction (Holdings) Ltd | Activities of construction holding companies | £57m | 91 |
| 122 | Orangebox Group Ltd | Manufacture of office and shop furniture | £56m | 406 |
| 124 | BBI Group Holding Ltd | Manufacture of other chemical products n.e.c. | £56m | 469 |
| 134 | Borley Engineering Services Ltd | Plumbing, heat and air-conditioning installation | £51m | 107 |
| 138 | Euro Commercials (South Wales) Ltd | Sale of new cars and light motor vehicles | £50m | 171 |
| 144 | Webex Communications UK, Ltd | Other telecommunications activities | £48m | Not stated |
| 150 | Inver Energy (UK) Ltd | Wholesale of petroleum and petroleum products | £46m | 7 |
| 155 | Madison CF UK Ltd | Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors | £44m | 92 |
| 159 | Modus Services (Holdings) Ltd | Other building completion and finishing | £44m | Not stated |
| 164 | H & B Supplies Ltd | Wholesale of perfume and cosmetics | £43m | 40 |
| 170 | WJEC CBAC Ltd | Technical and vocational secondary education | £41m | 415 |
| 171 | Hugh James | Legal activities | £41m | 715 |
| 173 | Gyrus Medical Ltd | Manufacture of medical and dental instruments and supplies | £41m | 205 |
| 179 | R & M Williams (Holdings) Ltd | Other building completion and finishing | £40m | 308 |
| 181 | The Number UK Ltd | Other telecommunications activities | £40m | 43 |

| Rank | Company | Activity | Latest Turnover | No. Employees |
|------|--|--|-----------------|---------------|
| 185 | Pak Mecca Meats Ltd | Wholesale of meat and meat products | £39m | 84 |
| 187 | Nemo Personal Finance Ltd | Other financial service activities, except insurance and pension funding, (not including security dealing on own account and factoring) n.e.c. | £39m | 72 |
| 193 | Amerisur Resources Plc | Extraction of crude petroleum | £38m | 76 |
| 199 | Rhys Davies & Sons Ltd | Freight transport by road | £38m | 420 |
| 202 | Ludlow Street Healthcare Group Ltd | Activities of head offices | £37m | 914 |
| 223 | Moondance Foundation | Other financial service activities, except insurance and pension funding, (not including security dealing on own account and factoring) n.e.c. | £34m | Not stated |
| 225 | Scansource Video Communication Ltd | Non-specialised wholesale trade | £34m | 59 |
| 232 | Cardiff City Football Club (Holdings) Ltd | Operation of sports facilities | £33m | 186 |
| 239 | Romtech Ltd | Manufacture of other fabricated metal products n.e.c. | £33m | 85 |
| 252 | Andersonbrecon (UK) Ltd | Packaging activities | £32m | 360 |
| 262 | Cardiff City Transport Services Ltd | Urban, suburban or metropolitan area passenger land transport other than railway transportation by underground, metro and similar systems | £31m | 672 |
| 263 | Castle Leisure Ltd | Gambling and betting activities | £31m | 670 |
| 280 | Career Choices Dewis Gyrfa Ltd | Other professional, scientific and technical activities (not including environmental consultancy or quantity surveying) n.e.c. | £28m | 621 |
| 286 | Suzuki Financial Services Ltd | Other financial service activities, except insurance and pension funding, (not including security dealing on own account and factoring) n.e.c. | £28m | 10 |
| 294 | The Wales Community Rehabilitation Company Ltd | Justice and judicial activities | £27m | 561 |
| 300 | Volcke Aerosol Connection Plc | Other manufacturing n.e.c. | £27m | 125 |

Source: Wales Top 300, Wales Online

<https://www.walesonline.co.uk/business/business-news/wales-top-300-2017-largest-14025999>

FAST GROWTH 50

The annual Fast Growth 50 looks at the fastest growing businesses in Wales. Details of Cardiff companies that feature in the list for 2017 are shown in Table 20.

Table 20: Fast Growth 50 Companies Based in Cardiff, 2017

| Rank | Company | Activity | % Growth 2014-2016 |
|------|---------------------------|--|--------------------|
| 10 | Amber Energy | Energy solutions | 211.1% |
| 11 | Intelligent Loans | Specialist mortgage products | 204.7% |
| 12 | S3 Advertising | Full-service national advertising agency | 202.4% |
| 14 | Coup Media | Social media agency and social data analytics | 200.6% |
| 17 | Compare My Move | Online comparison service for removal services | 171.4% |
| 19 | Oprema | Distributor of CCTV | 169.1% |
| 20 | CP Hire | Construction equipment rental | 160.9% |
| 23 | Bect Building Contractors | Civil engineering | 149.7% |
| 25 | DVS | National distributor of electronic video security products | 131.7% |
| 30 | Spartan Motor Factors | Automotive parts and accessories supplier | 117.0% |
| 31 | Specialist Mortgage Group | Specialist mortgage brokers | 115.1% |
| 32 | Activequote | Comparison site and broker | 110.8% |
| 37 | Wild Creations | Bespoke builds and installations | 105.2% |
| 38 | Spectrum Internet | Internet service provider | 105.0% |
| 41 | Sure Chill | Cooling technology | 96.6% |
| 43 | Yolk Recruitment | Recruitment services | 96.1% |
| 46 | React Support Services | Private specialist housing provider | 87.4% |
| 48 | Welsh Power Group | Power plant developer and operator | 84.9% |

Source: Fast Growth 50

ENTERPRISES

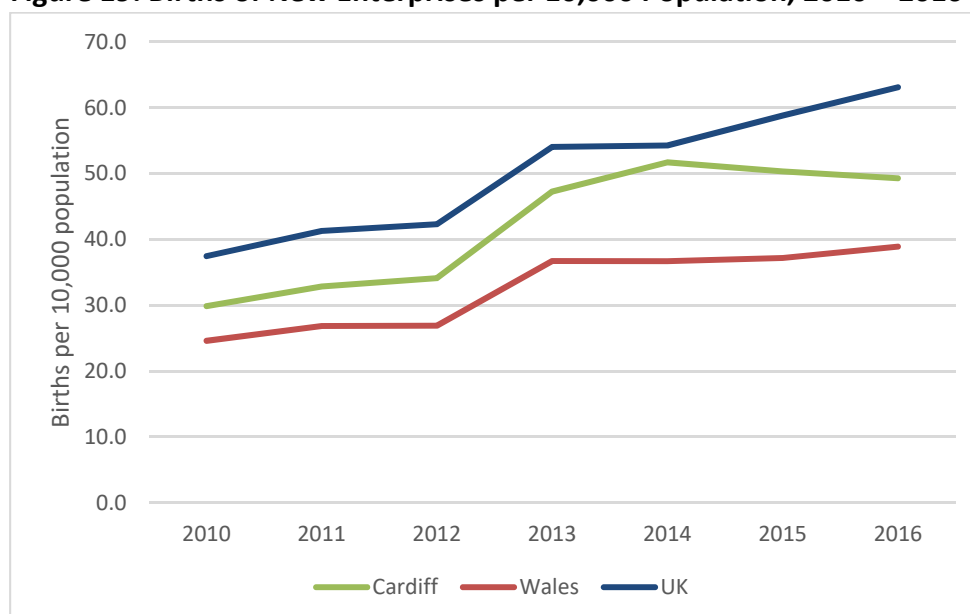
In 2016, there were 1,780 new enterprises in Cardiff, equating to 49.3 births per 10,000 residents (see Table 21). Although this exceeded the rate for Wales (38.9 per 10,000), it was below the UK average (63.1 per 10,000) as well as many of the major cities, in particular Manchester (119.1 per 10,000). Figure 19 shows that the number of new enterprises per 10,000 residents in Cardiff has consistently been below the UK rate and, in contrast to the national figure, has declined since 2014.

Table 21: Births of New Enterprises, 2016

| Area | Births of New Enterprises | Population (Mid-2016) | Births per 10,000 Population |
|---------------------|---------------------------|-----------------------|------------------------------|
| Manchester | 6,445 | 541,319 | 119.1 |
| Birmingham | 9,200 | 1,128,077 | 81.6 |
| Bristol, City of | 2,920 | 455,966 | 64.0 |
| Leeds | 4,820 | 781,087 | 61.7 |
| Edinburgh, City of | 2,915 | 507,170 | 57.5 |
| Liverpool | 2,670 | 487,605 | 54.8 |
| Glasgow City | 3,290 | 615,070 | 53.5 |
| CARDIFF | 1,780 | 361,168 | 49.3 |
| Nottingham | 1,480 | 324,779 | 45.6 |
| Sheffield | 2,525 | 574,050 | 44.0 |
| Newcastle upon Tyne | 1,265 | 293,713 | 43.1 |
| Wales | 12,115 | 3,113,150 | 38.9 |
| United Kingdom | 414,355 | 65,648,054 | 63.1 |

Source: Business Demography/Mid-Year Population Estimates, ONS

Figure 19: Births of New Enterprises per 10,000 Population, 2010 – 2016



Source: Business Demography/Mid-Year Population Estimates, ONS

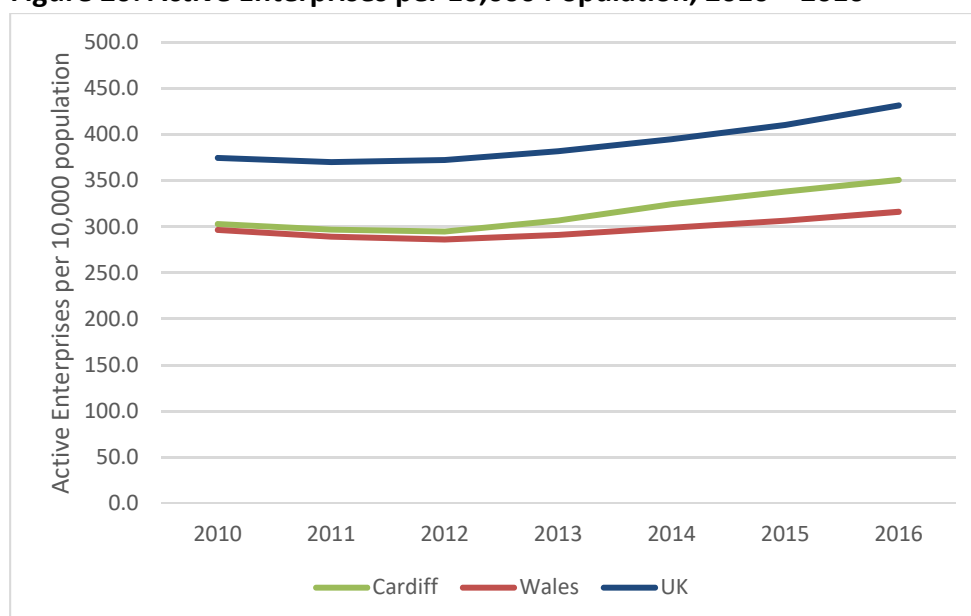
Cardiff had 12,670 active enterprises in 2016, representing a rate of 350.8 per 10,000 residents (see Table 22). As had been the case since 2010, this exceeded the figure for Wales but was below that of the UK (see Figure 20), despite an increase in recent years. Its 2016 rate was also less than that of several other major UK cities including Manchester (476.2 per 10,000).

Table 22: Active Enterprises, 2016

| Area | Active Enterprises | Population (Mid-2016) | Active Enterprises per 10,000 Population |
|---------------------|--------------------|-----------------------|--|
| Manchester | 25,780 | 541,319 | 476.2 |
| Bristol, City of | 20,305 | 455,966 | 445.3 |
| Leeds | 32,405 | 781,087 | 414.9 |
| Edinburgh, City of | 21,040 | 507,170 | 414.9 |
| Birmingham | 42,640 | 1,128,077 | 378.0 |
| CARDIFF | 12,670 | 361,168 | 350.8 |
| Glasgow City | 21,365 | 615,070 | 347.4 |
| Sheffield | 17,890 | 574,050 | 311.6 |
| Liverpool | 15,180 | 487,605 | 311.3 |
| Newcastle upon Tyne | 9,110 | 293,713 | 310.2 |
| Nottingham | 10,005 | 324,779 | 308.1 |
| Wales | 98,445 | 3,113,150 | 316.2 |
| United Kingdom | 2,833,965 | 65,648,054 | 431.7 |

Source: Business Demography/Mid-Year Population Estimates, ONS

Figure 20: Active Enterprises per 10,000 Population, 2010 – 2016



Source: Business Demography/Mid-Year Population Estimates, ONS

JOBS DENSITY

Jobs density is defined as the total number of filled jobs in an area (by residents and workers that commute into the area) divided by the resident population aged 16 to 64 in that area. Total jobs includes employees, self-employed, government-supported trainees and HM Forces.

In 2016, Cardiff's jobs density was 0.93 (i.e. 0.93 jobs for every resident aged 16 to 64) – see Table 23. This was below the figure for many of the major UK cities but exceeded those of both Wales (0.76) and the UK (0.84).

Table 23: Jobs Density, 2016

| Area | Jobs Density |
|---------------------|--------------|
| Manchester | 1.11 |
| Nottingham | 1.09 |
| Glasgow City | 1.05 |
| Edinburgh, City of | 1.02 |
| Newcastle upon Tyne | 0.98 |
| Bristol, City of | 0.97 |
| Leeds | 0.96 |
| CARDIFF | 0.93 |
| Liverpool | 0.82 |
| Birmingham | 0.79 |
| Sheffield | 0.76 |
| Wales | 0.76 |
| United Kingdom | 0.84 |

Source: Nomis

ECONOMIC ACTIVITY RATE (AGED 16-64)

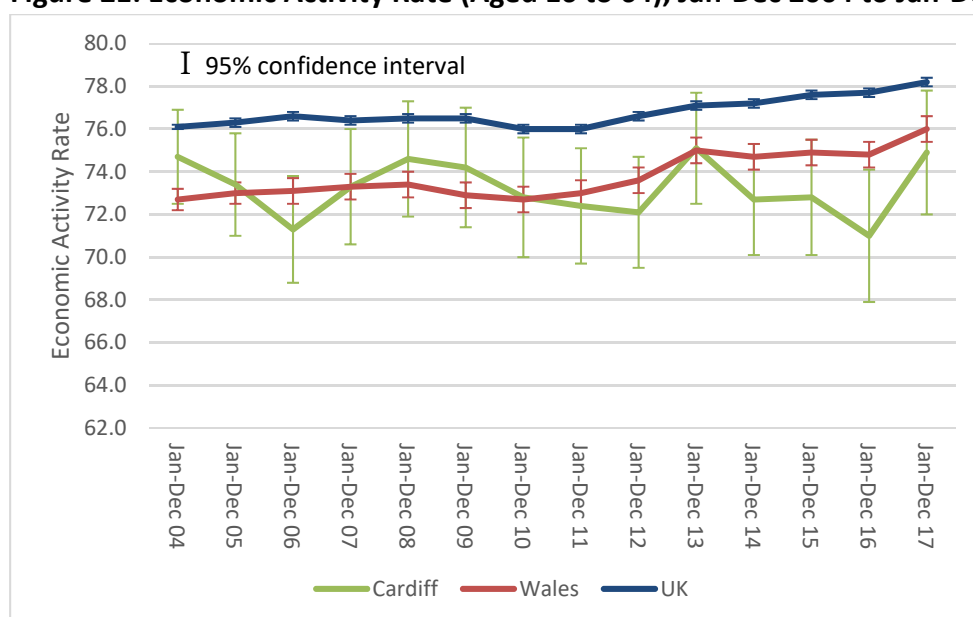
Cardiff's economic activity rate for those aged 16-64 (74.9%) is exceeded by both Wales and the UK (see Table 24) and has consistently been below the UK rate since 2004 (see Figure 21). Although this can be partly attributed to the city's large student population, many of these will be active in the labour market. In addition, Cardiff's rate compares poorly with several other major UK cities where student numbers would also be high.

Table 24: Economic Activity Rate (Aged 16 to 64), Jan – Dec 2017

| Area | Economic Activity Rate (%) |
|---------------------|----------------------------|
| Bristol, City of | 81.8 |
| Leeds | 80.1 |
| Edinburgh, City of | 77.6 |
| Sheffield | 75.6 |
| CARDIFF | 74.9 |
| Manchester | 72.0 |
| Liverpool | 71.3 |
| Newcastle upon Tyne | 71.1 |
| Glasgow City | 70.0 |
| Birmingham | 69.4 |
| Nottingham | 62.4 |
| Wales | 76.0 |
| United Kingdom | 78.2 |

Source: Annual Population Survey, ONS

Figure 21: Economic Activity Rate (Aged 16 to 64), Jan-Dec 2004 to Jan-Dec 2017



Source: Annual Population Survey, ONS

REASONS FOR ECONOMIC INACTIVITY (AGED 16-64)

The reasons for Cardiff's population aged 16 to 64 being economically inactive can be seen in Table 25. This shows that over two-fifths (44.3%) are inactive because they are students; one of the highest proportions across the UK's major cities and significantly above the equivalent figures for Wales (27.1%) and the UK (27.1%).

Table 25: Reasons for Economic Inactivity (Aged 16 to 64), Jan – Dec 2017

| Area | % of Economically Inactive Population Aged 16-64: | | | | |
|---------------------|---|---------------------------|----------------|------------|--------------|
| | Student | Looking After Family/Home | Long-Term Sick | Retired | Other Reason |
| Newcastle upon Tyne | 46.6 | 15.6 | 17.7 | 9.6 | 10.5 |
| Nottingham | 44.6 | 17.7 | 25.2 | 4.0 | 8.5 |
| CARDIFF | 44.3 | 16.2 | 23.0 | 8.1 | 8.4 |
| Edinburgh, City of | 42.0 | 10.6 | 15.9 | 14.5 | 17.0 |
| Birmingham | 39.6 | 27.9 | 16.7 | 5.1 | 10.7 |
| Bristol, City of | 36.2 | 19.1 | 23.0 | 8.9 | 12.8 |
| Manchester | 35.1 | 23.3 | 22.5 | 4.1 | 15.0 |
| Glasgow City | 33.2 | 18.3 | 29.2 | 7.4 | 11.9 |
| Sheffield | 30.8 | 25.4 | 24.3 | 9.1 | 10.4 |
| Leeds | 28.0 | 27.4 | 17.4 | 13.9 | 13.3 |
| Liverpool | 26.8 | 23.8 | 31.1 | 6.7 | 11.5 |
| Wales | 27.1 | 19.3 | 27.8 | 14.3 | 11.4 |
| United Kingdom | 27.1 | 24.4 | 22.3 | 13.1 | 13.1 |

Source: Annual Population Survey, ONS

UNEMPLOYMENT RATE (AGED 16+)

Cardiff's unemployment rate for those aged 16+ (6.1%) is one of the highest across the core city network (see Table 26). Although it experienced a sizeable decrease between 2012 and 2016, Cardiff has also consistently exceeded the figures of both the Wales and Great Britain since 2004, and saw its rate increase over the past year (see Figure 22).

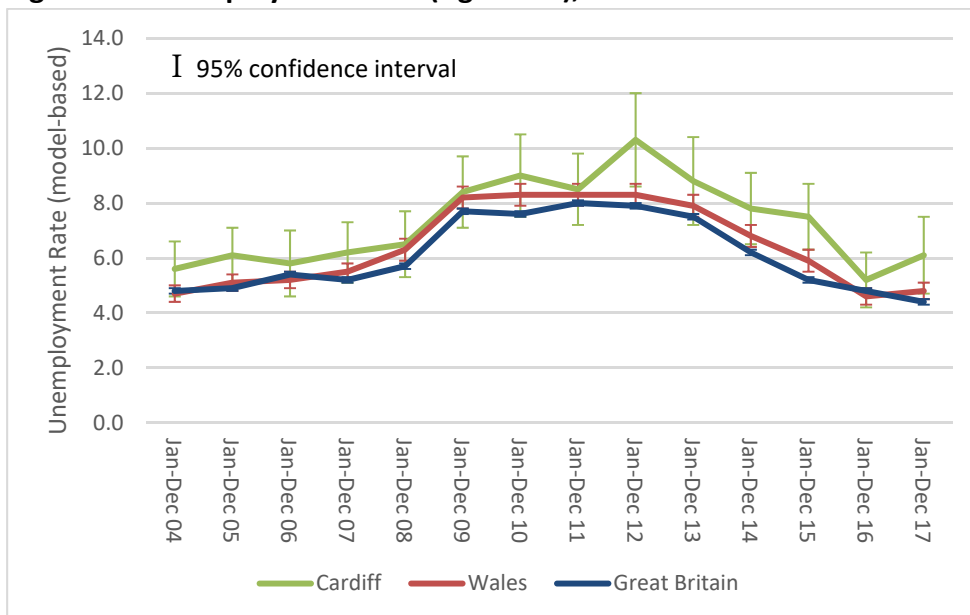
Table 26: Unemployment Rate (Aged 16+), Jan – Dec 2017

| Area | Unemployment Rate (Aged 16+) |
|---------------------|------------------------------|
| Nottingham | 8.3 |
| Birmingham | 8.1 |
| Newcastle upon Tyne | 6.9 |
| CARDIFF | 6.1 |
| Sheffield | 6.0 |
| Liverpool | 5.9 |
| Manchester | 5.6 |
| Glasgow City | 5.6 |
| Leeds | 4.7 |
| Bristol, City of | 4.0 |
| Edinburgh, City of | 3.2 |
| Wales | 4.8 |
| Great Britain | 4.4 |

Source: Annual Population Survey, ONS

NB. Local authority rates are model-based

Figure 22: Unemployment Rate (Aged 16+), Jan-Dec 2004 to Jan-Dec 2017



Source: Annual Population Survey, ONS

NB. Cardiff rate is model-based

CLAIMANT COUNT (AGED 16-64)

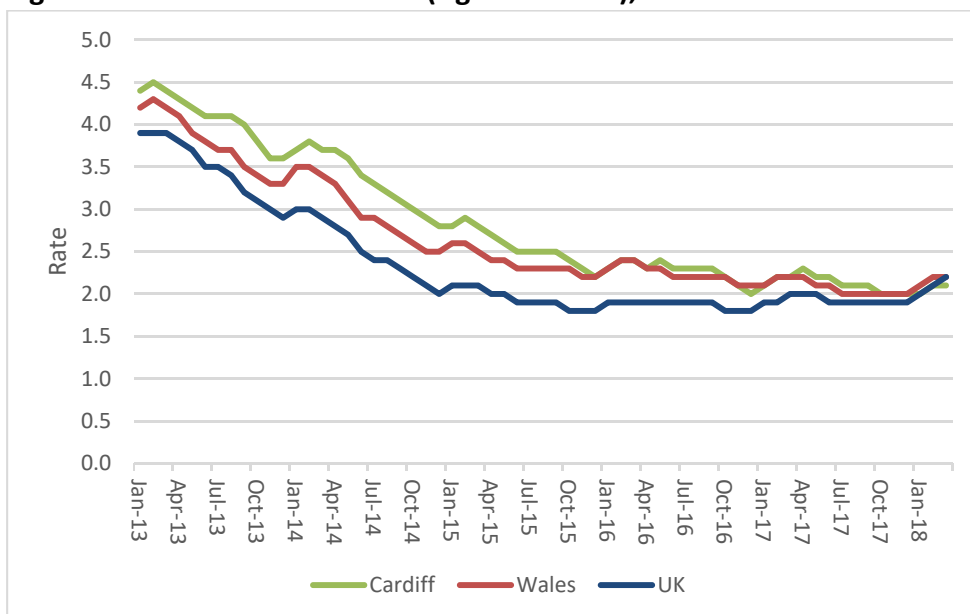
In March 2018, Cardiff (2.1%) had one of the lowest claimant count rates for those aged 16 to 64 across the core city network (see Table 27). It was also below both the Wales and UK rates for the first time since the beginning of 2013 (see Figure 23).

Table 27: Claimant Count Rate (Aged 16 to 64), March 2018

| Area | Claimant Count Rate (%) |
|---------------------|-------------------------|
| Birmingham | 4.7 |
| Newcastle upon Tyne | 4.1 |
| Liverpool | 3.6 |
| Nottingham | 3.4 |
| Glasgow City | 3.3 |
| Manchester | 3.0 |
| Sheffield | 2.5 |
| Leeds | 2.3 |
| CARDIFF | 2.1 |
| Bristol, City of | 1.8 |
| Edinburgh, City of | 1.4 |
| Wales | 2.2 |
| United Kingdom | 2.2 |

Source: Claimant Count, Nomis

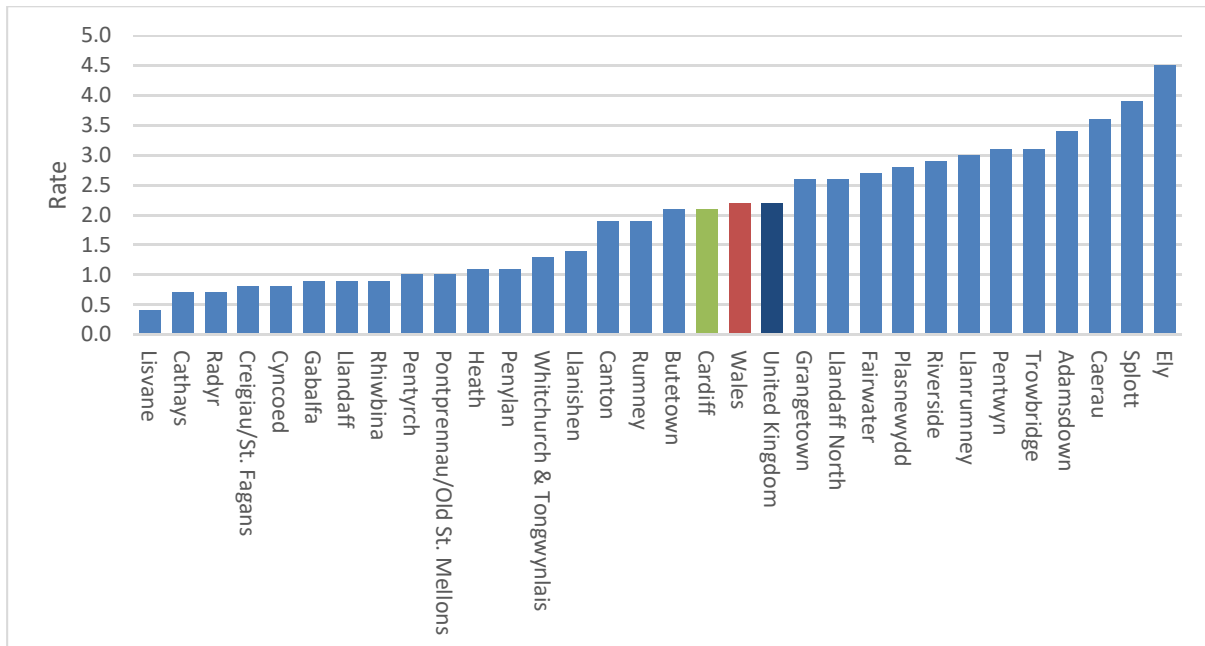
Figure 23: Claimant Count Rate (Aged 16 to 64), Jan 2013 – Mar 2018



Source: Claimant Count, Nomis

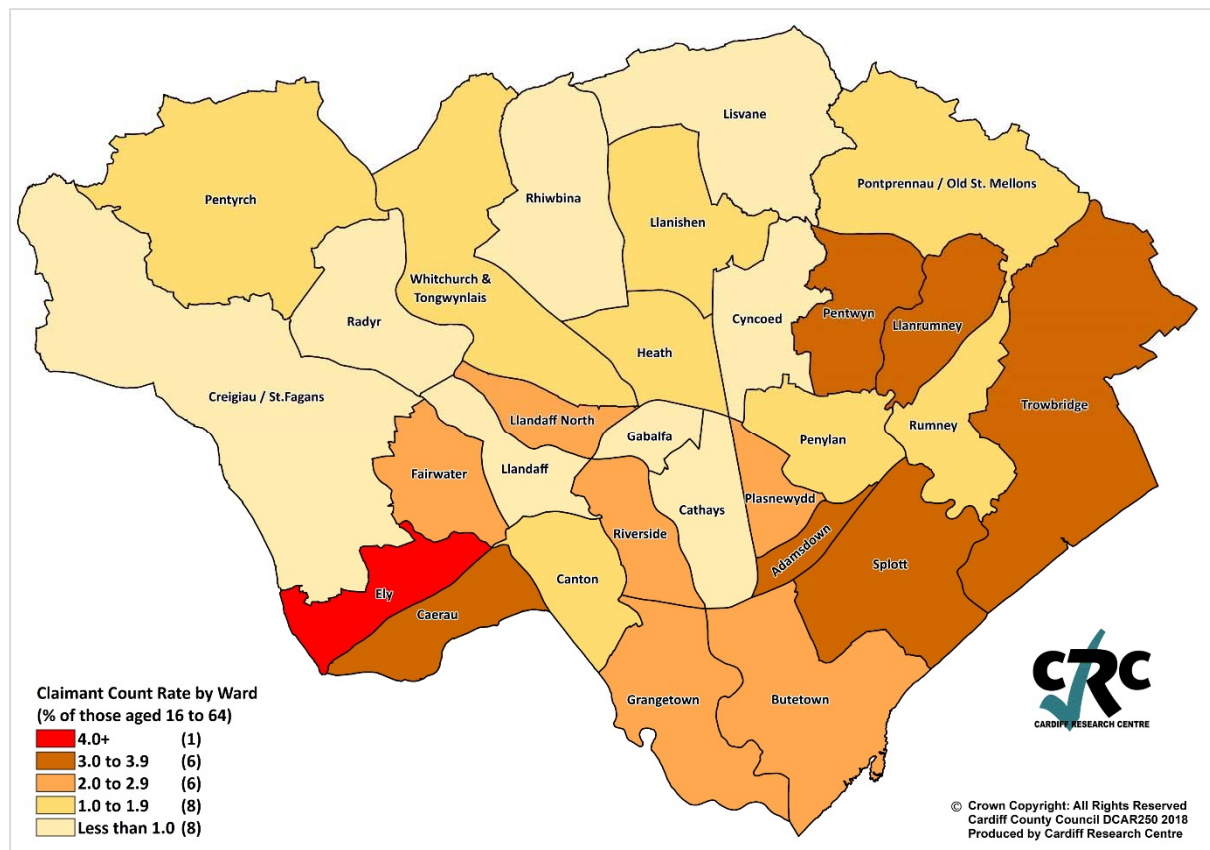
The disparities in the claimant count rate across Cardiff's wards, where in March 2018 it ranged from 0.4% in Lisvane to 4.5% in Ely, can be seen in Figures 24 and 25.

Figure 24: Claimant Count Rate (Aged 16 to 64) in Cardiff by Ward, March 2018



Source: Claimant Count, Nomis

Figure 25: Map of Claimant Count Rate (Aged 16 to 64) in Cardiff by Ward, March 2018



Source: Claimant Count, Nomis/Cardiff Council

CLAIMANT COUNT (AGED 18-24)

Cardiff's claimant count rate for those aged 18 to 24 (1.9%) is again one of the lowest across the core cities (see Table 28). It also compares favourably with the Wales and UK rates, although, in contrast to those aged 16 to 64, it has consistently been below them since January 2013 (see Figure 26).

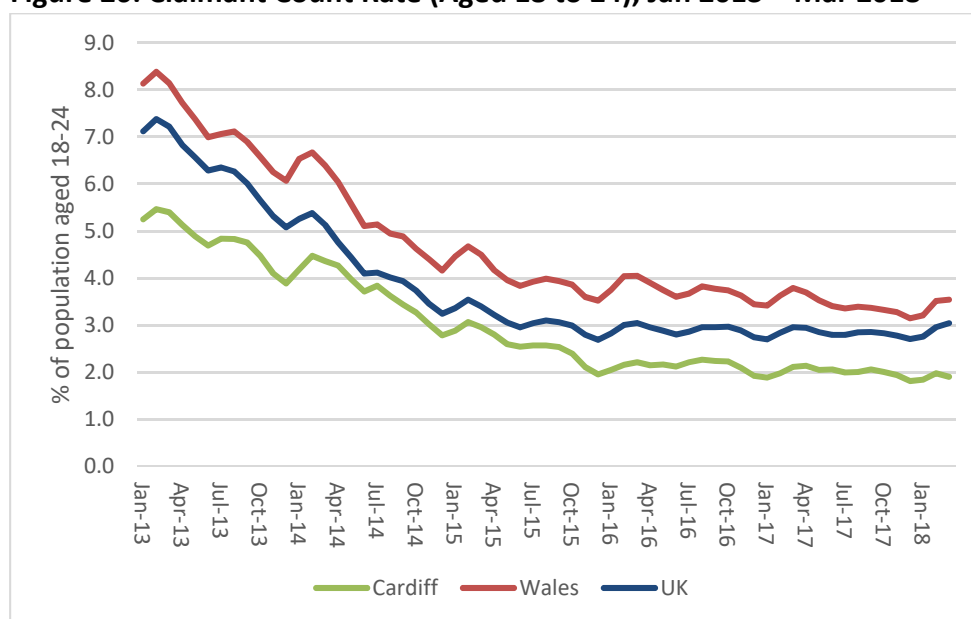
Table 28: Claimant Count Rate (Aged 18 to 24), March 2018

| Area | No. Claimants (18-24) | Population Aged 18-24 (Mid-2016) | Rate |
|---------------------|-----------------------|----------------------------------|------------|
| Birmingham | 6,455 | 140,822 | 4.6 |
| Glasgow City | 2,620 | 71,701 | 3.7 |
| Liverpool | 2,175 | 69,297 | 3.1 |
| Newcastle upon Tyne | 1,505 | 50,963 | 3.0 |
| Manchester | 2,180 | 87,386 | 2.5 |
| Nottingham | 1,605 | 65,681 | 2.4 |
| Sheffield | 2,000 | 82,872 | 2.4 |
| Leeds | 2,415 | 104,907 | 2.3 |
| CARDIFF | 1,050 | 55,161 | 1.9 |
| Bristol, City of | 980 | 62,060 | 1.6 |
| Edinburgh, City of | 820 | 57,860 | 1.4 |
| Wales | 10,235 | 288,845 | 3.5 |
| UK | 177,230 | 5,828,999 | 3.0 |

Source: Claimant Count, Nomis/Mid-Year Population Estimates, ONS

NB. Claimant numbers have are rounded to the nearest five.

Figure 26: Claimant Count Rate (Aged 18 to 24), Jan 2013 – Mar 2018



Source: Claimant Count, Nomis/Mid-Year Population Estimates, ONS