

The Cardiff Economy & Labour Market July – December 2015

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Cardiff Research Centre

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Executive Summary

- The total number of Jobseeker's Allowance (JSA) claimants in Cardiff fell by 20.0% from 6,698 in December 2014 to 5,359 in December 2015. This was below the reductions seen in Wales (-22.7%) and the UK (-23.5%). In December 2015, the Cardiff proportion stood at 2.2% compared with 1.9% in Wales and 1.5% in the UK.
- Between December 2014 and December 2015, the number of male JSA claimants in Cardiff decreased by 22.1% from 4,513 to 3,515. Wales and the UK saw larger contractions of 25.8% and 24.2% respectively.
- The number of female JSA claimants in Cardiff fell from 2,185 in December 2014 to 1,844 in December 2015, representing a decline of 15.6%. As with total and male claimants, this was below the decreases seen in Wales (-16.7%) and the UK (-22.3%).
- Cardiff's total and male JSA claimant proportions both exceeded the equivalent figures for Wales and the UK between December 2014 and December 2015. This was also predominantly the case for females, with the only exception being in January 2015 when the Cardiff rate matched that of Wales.
- In December 2015, the total JSA claimant rate varied around twenty-fold across the local authority from 0.3% in Creigiau/St. Fagans to 5.1% in Ely, and compared with 2.2% for Cardiff as a whole.
- All of the twenty-nine wards experienced a reduction in their total number of JSA claimants between December 2014 and December 2015, with Creigiau/St. Fagans (-68.0%) and Cyncoed (-47.5%) seeing the greatest percentage decrease in numbers. In comparison, Cardiff's claimants contracted by 20.0%.
- In December 2015, those aged 25–34 had the highest JSA claimant rate, with 2.7% of the population within this age range claiming JSA, closely followed by those aged 35–44 (2.6%).
- More than half of Cardiff's JSA claimants in December 2015 had been claiming for less than six months (55.7%). However, over a tenth (10.9%) had been claiming for more than three years.
- By far the most sought-after occupation of Cardiff's JSA claimants in December 2015 was Sales & Customer Service Occupations (55.0%), with more than half of the claimants interested in work of this type, while over a sixth were seeking employment in Elementary Occupations (15.4%). As such, around seven-tenths of claimants were looking for work in either of these professions.
- Ethnic minorities comprised 20.0% of the JSA claimants in Cardiff in December 2015 compared with just 14.9% of the population aged 16–64.

- All but one of the ethnic minority sub-groups in Cardiff also accounted for more than their proportional share of claimants, in particular the Black/African/Caribbean/Black British and Other Ethnic Group categories. Their shares of the local authority's JSA claimants were more than double those of the working age population as a whole, with them comprising only 2.2% and 1.9% of the total population aged 16–64 but 6.6% and 4.3% of claimants respectively.
- The only ethnic minority group in Cardiff to have less than their proportional share of JSA claimants was the Asian/Asian British category, as was also the case in both Wales and England & Wales. This accounted for 8.2% of the population aged 16–64 in the local authority but only 5.3% of the claimants.
- According to the October 2014 – September 2015 Annual Population Survey, Cardiff's (model based) ILO unemployment rate was 7.9%. This was the joint-second highest figure out of the local authorities in South East Wales and exceeded the rates of both Wales (6.3%) and Great Britain (5.4%).
- Cardiff's unemployment rate and comparative position has deteriorated since the October 2013 – September 2014 survey, when it had the fourth lowest rate in South East Wales of 7.5%, following an increase of 0.4 percentage points.
- The economic activity rate of the resident population aged 16–64 in Cardiff is 73.7%, according to the October 2014 – September 2015 Annual Population Survey. This is the second lowest rate in South East Wales, and also compares poorly with the figures for both Wales (75.1%) and the UK (77.5%).
- Cardiff's relative position in South East Wales has remained unchanged since the October 2013 – September 2014 survey, when it also had the second lowest economic activity rate in the area. Over the year, its rate increased slightly by 0.1 percentage points; below the expansions in Wales and the UK (both 0.3 percentage points).
- According to the October 2014 – September 2015 Annual Population Survey, over two-fifths (42.6%) of Cardiff's economically inactive population aged 16–64 are inactive due to them being students, while almost a quarter (23.8%) are long-term sick, and around one-in-seven (14.4%) are looking after their family/home.
- Just over a quarter (26.1%) of the economically inactive population in Cardiff want a job, according to the October 2014 – September 2015 Annual Population Survey. This represents a decline of 0.8 percentage points since the October 2013 – September 2014 survey, when this figure stood at 26.9%.
- According to the October 2014 – September 2015 Annual Population Survey, Cardiff has the third lowest employment rate (68.2%) for the resident population aged 16–64 in South East Wales, and is below the comparative figures for both Wales (70.3%) and the UK (73.2%).

- Cardiff's relative position in South East Wales has also worsened since the October 2013 – September 2014 survey, when it had the fifth highest employment rate in the region. It was one of just three local authorities to see a decrease over the year, with its reduction of 0.8 percentage points only comparing favourably with Caerphilly.
- Figures from the Office for National Statistics' 2014 Business Register and Employment Survey show that there were 200,400 persons working in Cardiff, with Health (13.9%) the main employment sector, followed by Retail (10.8%). However, the share employed locally in Manufacturing (4.7%) was significantly below the levels seen in both Wales and Great Britain.
- Only 8 of the 18 sectors in the local authority saw an increase in their workforce over the year, with the greatest expansion occurring in Business Administration & Support Services (3,500 people). This sector also saw the largest growth in the percentage share of total employment (1.7 percentage points), as well as the second greatest percentage rise in employees of 21.4%, behind only the Information & Communication sector (28.8%).
- The greatest numerical and percentage share contractions in Cardiff were in the Professional, Scientific & Technical sector, whose numbers fell by 1,800 and its percentage share of total employment by 1.0 percentage points. It also saw the second largest percentage decline (-11.7%) in terms of the number in employment, behind only Motor Trades (-20.6%).
- Figures from the 2015 Annual Survey of Hours and Earnings show that the resident-based median gross weekly full-time earnings for all workers in Cardiff (£510.20) are 5.3% higher than the Welsh average (£484.40), but 3.3% below the UK figure of £527.70.
- Workplace-based earnings in Cardiff again compare favourably against Wales, while falling below the levels seen across the UK as a whole. The median gross weekly earnings of the total full-time workforce in Cardiff (£499.20) are 5.4% above the Wales figure but 5.4% below that of the UK.
- An estimated 60,800 commute in to Cardiff from the neighbouring local authority areas of the Vale of Glamorgan, Rhondda Cynon Taff, Caerphilly and Newport, while a further 21,000 commute to the city daily from further afield.
- Out-commuting from Cardiff by those residing in the city is less pronounced. It is estimated that there are a total of 33,700 daily out-commuters, including approximately 6,100 who work in Rhondda Cynon Taff, 5,300 in Newport, 3,900 in the Vale of Glamorgan, 2,600 in Caerphilly, and 2,300 in Bridgend.
- In 2013, Cardiff (0.91) had the highest jobs density (defined as the total number of filled jobs in an area divided by the resident population aged 16–64 of that area) of the ten local authorities in South East Wales, a position it also held in 2008, and was above the figures for both Wales (0.72) and the UK (0.79).

- Cardiff and the Vale of Glamorgan accounted for almost a fifth (19.6%) of Wales' total GVA in 2014. In addition, GVA per head (£22,107), calculated by dividing a location's total GVA estimate for a given year by the relevant contemporaneous resident population estimate for that area, exceeded the Wales figure (£17,573), although it was below the UK average (£24,616).
- Between 2009 and 2014 GVA per head increased by 7.1% in Cardiff and the Vale of Glamorgan. In comparison, Wales and the UK saw larger expansions of 13.8% and 15.7%, respectively, over the same period.
- According to the 2014 Business Demography, the number of active enterprises (i.e. businesses that had either turnover or employment at any time during the reference period) in Cardiff had increased by 715 since 2013. There was also a net increase of 12.0% (1,230 enterprises) between 2009 and 2014, despite the number of enterprises falling in 2011.
- The percentage of Cardiff's population aged 16–64 with an NVQ4 or higher (46.0%) is significantly above both the Wales (33.2%) and UK (35.8%) averages. Similarly, Cardiff also has the highest proportion qualified to NVQ3+ (65.8%), NVQ2+ (77.6%) and NVQ1+ (86.8%), as well as with Other Qualifications (6.6%). In addition, the percentage share with No Qualifications is smaller in Cardiff (6.6%) than in Wales (10.0%) and the UK (9.0%). However, the local authority has the smallest proportion with Trade Apprenticeships (2.2%).
- The share of Cardiff's population aged 16–64 qualified to NVQ4 and above has grown substantially (7.6 percentage points) since the January – December 2013 Annual Population Survey, while the proportion with No Qualifications has contracted by 1.6 percentage points. This suggests that Cardiff's working age population has generally become more qualified over the twelve-month period.

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The Cardiff Economy and Labour Market

July – December 2015

1.0 Introduction

1.1 This report uses the most recent statistical data to examine Cardiff's economy and labour market, as well as providing comparisons with the national picture. It includes sections on Jobseeker's Allowance (JSA) claimants, unemployment, economic activity and inactivity, employment, earnings, commuting patterns, Gross Value Added (GVA), active enterprises, qualifications, and industrial and commercial planning permissions.

2.0 Overview of the National & International Economy, July – December 2015

2.1 The UK economy expanded by 0.5% in the fourth quarter of 2015¹, following growth of 0.4% in the previous three months. At the end of the period, GDP was 1.9% higher than in the same quarter of 2014. For 2015 as a whole, GDP grew by 2.2% over 2014; down from 2.9% in the previous year. The Office for Budget Responsibility, formed in May 2010 to make an independent assessment of the public finances ahead of each Budget, forecast the UK economy would expand by 2.4% in both 2015 and 2016 in its November 2015 Economic and Fiscal Outlook report.

2.2 The output of the service sector, which accounts for approximately three-quarters of the UK economy, increased by 0.7% in the three months to December 2015 and by 0.6% in the previous quarter. In contrast, production industries saw output fall by 0.5% in the fourth quarter following growth of 0.1% in the previous three months, while manufacturing was flat in Q4 after declining by 0.4% in Q3. Construction output, meanwhile, contracted by 1.7% in Q3 and 0.4% in Q4.

2.3 According to the International Monetary Fund's January 2016 World Economic Outlook Update report, the world economy expanded by 3.1% in 2015; down from 3.4% in the previous year. However, global growth is expected to strengthen to 3.4% in 2016 and 3.6% in 2017.

2.4 UK interest rates have remained at an all-time low of 0.5% since May 2009, with the Bank of England's programme of monetary stimulus also staying unchanged at £375bn over the six-month period. Similarly, the European Central Bank maintained its rate at a record low of 0.05% between July and December, and at the end of the year cut overnight deposit rates as well as extending its monthly €60bn asset-buying programme by six months to March 2017. In contrast, the US Federal Reserve raised interest rates in December 2015 for the first time since 2006, with an increase of 0.25 percentage points taking the Federal Funds rate to between 0.25% and 0.5%.

¹ Source: Second Estimate of GDP, Q4 (Oct to Dec) 2015 (ONS)

- 2.5 Consumer Price Index annual inflation continued to be below its target rate of 2.0% throughout the six months; ranging from -0.1% to 0.2% over the period. Meanwhile, Retail Price Index inflation, which takes into account mortgage costs, increased from 1.0% in July 2015 to 1.2% in December 2015, despite falling to 0.7% in October (its lowest rate since November 2009).
- 2.6 Information from the Office for National Statistics' (ONS) monthly UK Labour Market publication shows that the employment rate for those aged 16 to 64 in the UK was 74.1% for the three months to December 2015; an increase of 0.9 percentage points over the year and the highest rate since comparable records began in 1971. The number of people in employment, meanwhile, was 31.42 million for the three months ending in December 2015. This represented an increase of 521,000 on the same period a year previously.
- 2.7 The unemployment rate for the three months ending in December 2015 was 5.1%. This denoted a fall of 0.6 percentage points from a year earlier. The number of unemployed people decreased over the year by 172,000 to 1.69 million.
- 2.8 In December 2015, 775,000 people were claiming unemployment related benefits (claimant count), representing a decrease of 106,300 over the year and the lowest figure since June 1975. The economic inactivity rate of the population aged 16 to 64, meanwhile, stood at 21.8% (8.88 million people) for the three months to December 2015; down 0.5 percentage points (-172,000 people) from the same period a year previously and only slightly higher than the record low of 21.7% last recorded for July to September 1990.
- 2.9 For the three months ending in December 2015 the number of job vacancies was 756,000, which corresponded to an increase of 46,000 vacancies over the year and was the highest figure since comparable records began in 2001. Meanwhile, the annual growth rate of regular pay (excluding bonuses) was 2.0%.

JOBSEEKER'S ALLOWANCE (JSA) CLAIMANTS & UNEMPLOYMENT IN CARDIFF

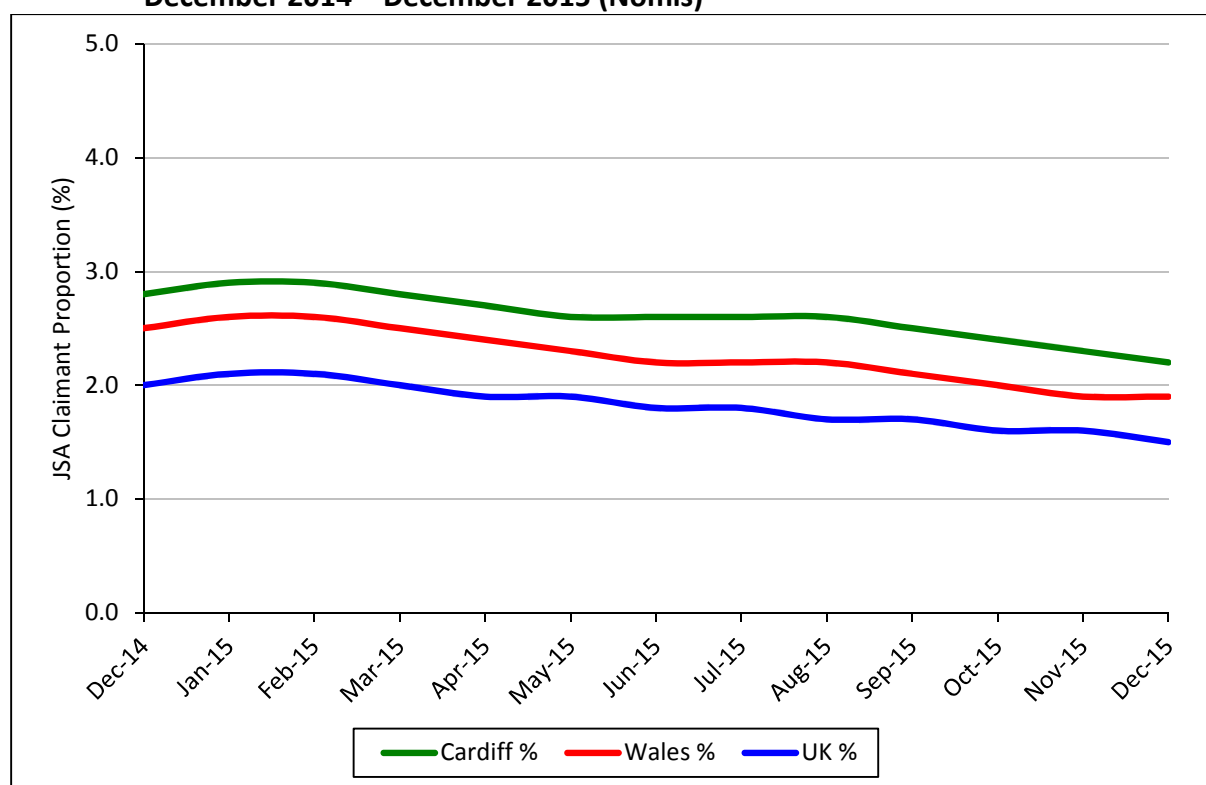
3.0 JSA Claimants (Resident-based)

3.1 The total number of Jobseeker's Allowance (JSA) claimants in Cardiff for December 2014 to December 2015, along with its resident-based proportions² and comparative figures for Wales and the UK, are shown in Table 1 below.

Date	Cardiff		Wales	United Kingdom
	No.	%	%	%
2014 December	6,698	2.8	2.5	2.0
2015 January	6,888	2.9	2.6	2.1
February	6,916	2.9	2.6	2.1
March	6,712	2.8	2.5	2.0
April	6,591	2.7	2.4	1.9
May	6,289	2.6	2.3	1.9
June	6,156	2.6	2.2	1.8
July	6,128	2.6	2.2	1.8
August	6,156	2.6	2.2	1.7
September	6,097	2.5	2.1	1.7
October	5,776	2.4	2.0	1.6
November	5,595	2.3	1.9	1.6
December	5,359	2.2	1.9	1.5

Source: JSA Claimant Count/Nomis

Figure 1: Total Resident-Based JSA Claimant Proportions, December 2014 – December 2015 (Nomis)



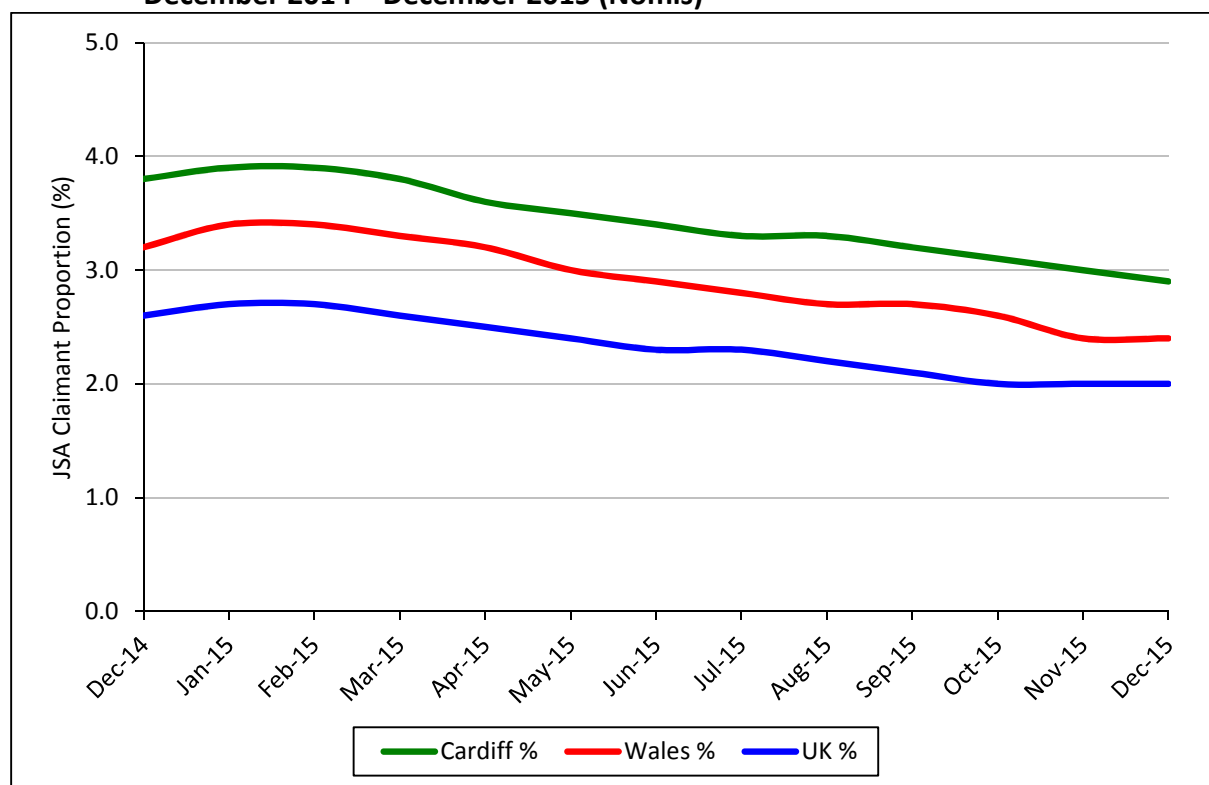
² Local area JSA claimant count figures expressed as a proportion of the resident population aged 16-64.

3.2 The total number of JSA claimants in Cardiff fell by 20.0% from 6,698 in December 2014 to 5,359 in December 2015. This was below the reductions seen in Wales (-22.7%) and the UK (-23.5%). In addition, Cardiff's JSA claimant proportion exceeded both the Wales and UK rates throughout the period (see Figure 1). In December 2015, the Cardiff proportion stood at 2.2% compared with 1.9% in Wales and 1.5% in the UK.

Table 2: Male JSA Claimants (December 2014 – December 2015)					
Date	Cardiff		Wales %	United Kingdom %	
	No.	%			
2014	December	4,513	3.8	3.2	2.6
2015	January	4,662	3.9	3.4	2.7
	February	4,627	3.9	3.4	2.7
	March	4,500	3.8	3.3	2.6
	April	4,360	3.6	3.2	2.5
	May	4,141	3.5	3.0	2.4
	June	4,019	3.4	2.9	2.3
	July	3,941	3.3	2.8	2.3
	August	3,936	3.3	2.7	2.2
	September	3,889	3.2	2.7	2.1
	October	3,716	3.1	2.6	2.0
	November	3,631	3.0	2.4	2.0
	December	3,515	2.9	2.4	2.0

Source: JSA Claimant Count/Nomis

Figure 2: Male Resident-Based JSA Claimant Proportions, December 2014 – December 2015 (Nomis)

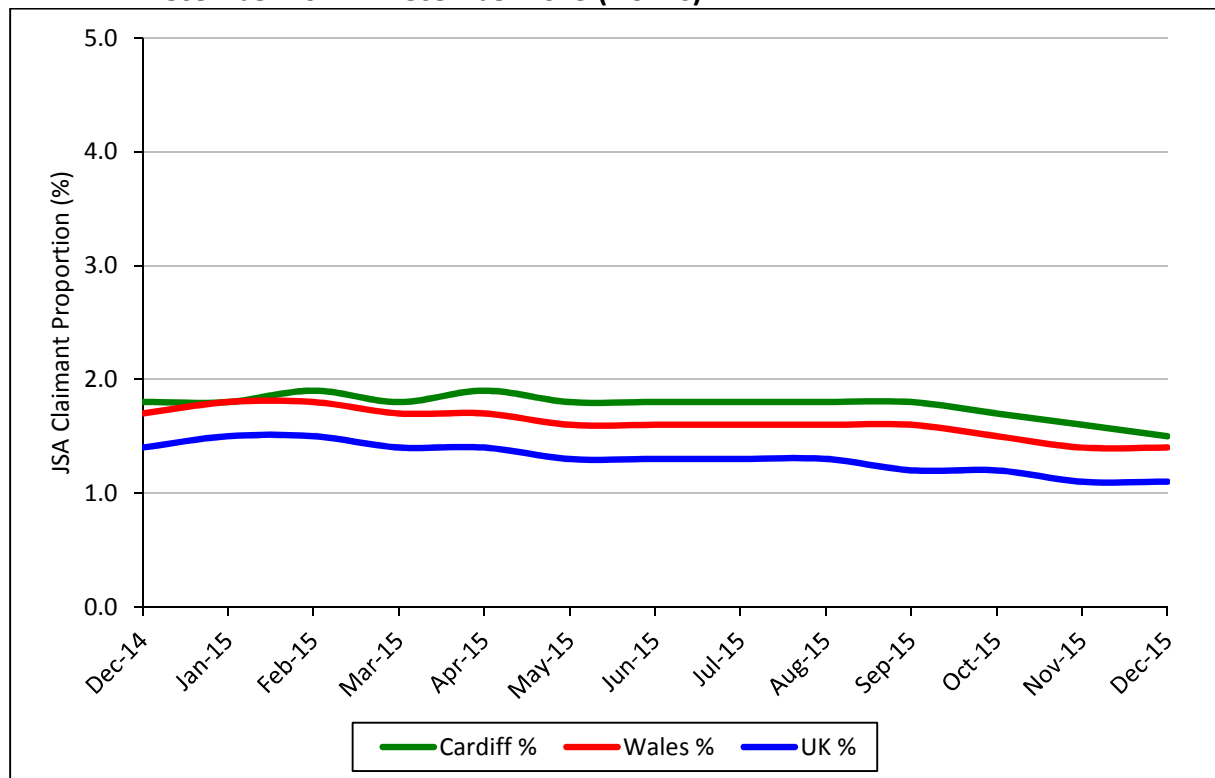


3.3 Between December 2014 and December 2015, the number of male JSA claimants in Cardiff decreased by 22.1% from 4,513 to 3,515, as shown in Table 2. Wales and the UK saw larger contractions of 25.8% and 24.2% respectively, with Cardiff also consistently having the highest rate over the period (see Figure 2). In December 2015, its proportion of 2.9% compared with 2.4% in Wales and 2.0% in the UK.

Date	Cardiff		Wales %	United Kingdom %
	No.	%		
2014 December	2,185	1.8	1.7	1.4
2015 January	2,226	1.8	1.8	1.5
February	2,289	1.9	1.8	1.5
March	2,212	1.8	1.7	1.4
April	2,231	1.9	1.7	1.4
May	2,148	1.8	1.6	1.3
June	2,137	1.8	1.6	1.3
July	2,187	1.8	1.6	1.3
August	2,220	1.8	1.6	1.3
September	2,208	1.8	1.6	1.2
October	2,060	1.7	1.5	1.2
November	1,964	1.6	1.4	1.1
December	1,844	1.5	1.4	1.1

Source: JSA Claimant Count/Nomis

Figure 3: Female Resident-Based JSA Claimant Proportions, December 2014 – December 2015 (Nomis)



3.4 The number of female JSA claimants in Cardiff fell from 2,185 in December 2014 to 1,844 in December 2015 (see Table 3), representing a decline of 15.6%. As with total

and male claimants, this was below the decreases seen in Wales (-16.7%) and the UK (-22.3%). Similarly, with the exception of January 2015 when it matched the Wales rate, Cardiff's JSA claimant proportion was again above those of Wales and the UK over the period, although the difference was less pronounced than for both the total and male claimants (see Figure 3). In December 2015, Cardiff's female proportion was 1.5%, compared with 1.4% for Wales and 1.1% for the UK.

4.0 JSA Claimants by Ward

4.1 The disparities in the resident-based JSA claimant proportions across Cardiff's wards can be seen in Table 4. In December 2015, the total JSA claimant rate varied around twenty-fold across the local authority from 0.3% in Creigiau/St. Fagans to 5.1% in Ely, and compared with 2.2% for Cardiff as a whole.

Ward	Male		Female		Total	
	No.	%	No.	%	No.	%
Adamsdown	267	5.5	119	3.0	386	4.3
Butetown	161	3.0	55	1.4	216	2.3
Caerau	199	5.8	117	3.1	316	4.4
Canton	126	2.5	75	1.5	201	2.0
Cathays	112	1.1	31	0.3	143	0.7
Creigiau/St. Fagans	5	0.3	3	0.2	8	0.3
Cyncoed	32	0.9	10	0.3	42	0.6
Ely	285	7.2	158	3.3	443	5.1
Fairwater	139	3.4	67	1.6	206	2.5
Gabalfa	52	1.6	23	0.6	75	1.0
Grangetown	256	3.4	156	2.3	412	2.9
Heath	42	1.0	21	0.5	63	0.8
Lisvane	9	0.9	5	0.5	14	0.7
Llandaff	35	1.3	17	0.6	52	0.9
Llandaff North	99	3.8	68	2.4	167	3.1
Llanishen	88	1.6	66	1.1	154	1.4
Llanrumney	150	4.5	81	2.2	231	3.3
Pentwyn	202	4.4	126	2.5	328	3.4
Pentyrch	13	1.3	11	1.0	24	1.1
Penylan	65	1.6	33	0.8	98	1.2
Plasnewydd	297	3.8	97	1.4	394	2.7
Pontprennau/Old St. Mellons	44	1.4	25	0.7	69	1.0
Radyr	16	0.8	8	0.4	24	0.6
Rhiwbina	27	0.9	12	0.4	39	0.6
Riverside	205	3.7	86	1.9	291	2.9
Rumney	71	2.7	43	1.5	114	2.1
Splott	238	5.3	136	2.9	374	4.1
Trowbridge	187	3.9	150	2.7	337	3.2
Whitchurch and Tongwynlais	93	1.8	45	0.9	138	1.4
Cardiff	3,515	2.9	1,844	1.5	5,359	2.2

Source: JSA Claimant Count/Nomis

4.2 All of the twenty-nine wards experienced a decrease in their total number of JSA claimants between December 2014 and December 2015, as shown in Table 5. The largest numerical reductions were in Plasnewydd (-118), Riverside (-113) and Ely (-109), although Creigiau/St. Fagans (-68.0%) and Cyncoed (-47.5%) saw the greatest percentage decrease in numbers. In comparison, Cardiff's claimants contracted by 20.0%. Each of the wards also witnessed a fall in their JSA claimant proportions over the period, with Ely (-1.3 percentage points) experiencing the most substantial decline, followed by Riverside (-1.1 percentage points) and Rumney (-1.0 percentage points). The proportion for Cardiff as a whole fell by 0.6 percentage points.

Ward	December 2015		December 2014		Change Dec '14 – Dec '15	
	No.	%	No.	%	No.	% Point
Adamsdown	386	4.3	414	4.7	-28	-0.3
Butetown	216	2.3	278	3.0	-62	-0.7
Caerau	316	4.4	373	5.2	-57	-0.8
Canton	201	2.0	254	2.6	-53	-0.5
Cathays	143	0.7	195	1.0	-52	-0.3
Creigiau/St. Fagans	8	0.3	25	0.8	-17	-0.5
Cyncoed	42	0.6	80	1.1	-38	-0.5
Ely	443	5.1	552	6.4	-109	-1.3
Fairwater	206	2.5	283	3.4	-77	-0.9
Gabalfa	75	1.0	109	1.5	-34	-0.5
Grangetown	412	2.9	501	3.5	-89	-0.6
Heath	63	0.8	97	1.2	-34	-0.4
Lisvane	14	0.7	16	0.8	-2	-0.1
Llandaff	52	0.9	65	1.1	-13	-0.2
Llandaff North	167	3.1	183	3.4	-16	-0.3
Llanishen	154	1.4	165	1.5	-11	-0.1
Llanrumney	231	3.3	277	4.0	-46	-0.7
Pentwyn	328	3.4	380	3.9	-52	-0.5
Pentyrch	24	1.1	33	1.6	-9	-0.4
Penylan	98	1.2	138	1.7	-40	-0.5
Plasnewydd	394	2.7	512	3.5	-118	-0.8
Pontprennau/Old St. Mellons	69	1.0	78	1.2	-9	-0.1
Radyr	24	0.6	30	0.7	-6	-0.1
Rhiwbina	39	0.6	60	1.0	-21	-0.3
Riverside	291	2.9	404	4.0	-113	-1.1
Rumney	114	2.1	167	3.0	-53	-1.0
Splott	374	4.1	439	4.8	-65	-0.7
Trowbridge	337	3.2	422	4.0	-85	-0.8
Whitchurch and Tongwynlais	138	1.4	168	1.6	-30	-0.3
Cardiff	5,359	2.2	6,698	2.8	-1,339	-0.6

Source: JSA Claimant Count/Nomis

5.0 Age and Duration of JSA Claimants

5.1 This section looks at the age of the JSA claimants and the length of time they have been claiming JSA in Cardiff, Wales and the UK. Table 6 displays the age of those claiming JSA in Cardiff, as well as the JSA claimant proportions of the respective age groups. In December 2015, those aged 25–34 had the highest rate, with 2.7% of the population within this age range claiming JSA, closely followed by those aged 35–44 (2.6%). However, this category also saw the greatest percentage point decline (-0.8 percentage points) since December 2014. In terms of the number of claimants, those aged 24 and under (-445) saw the largest contraction, while the 55+ category, which was unchanged, was the only group not to experience a decrease.

Age	December 2015		December 2014		Change Dec '14 – Dec '15	
	No.	%	No.	%	No.	% Point
24 and under	1,050	1.7	1,495	2.4	-445	-0.7
25–34	1,525	2.7	1,955	3.5	-430	-0.8
35–44	1,130	2.6	1,395	3.2	-265	-0.6
45–54	1,060	2.5	1,265	2.9	-205	-0.4
55+	590	1.7	590	1.7	0	0.0
Total JSA Claimants	5,350	2.2	6,695	2.8	-1,345	-0.6

Source: JSA Claimant Count/Nomis/Cardiff Research Centre

NB. Data rounded to nearest 5 (disclosure control).

Proportions have been calculated using the rounded number of JSA claimants and the mid-2014 resident population estimates for the appropriate age group. The populations used for the 24 and under, and 55+ categories are those aged 16–24 and 55–64 respectively. Total JSA Claimants uses the population aged 16–64.

Age	December 2015			Change Dec '14 – Dec '15		
	Cardiff %	Wales %	UK %	Cardiff % Point	Wales % Point	UK % Point
24 and under	1.7	1.9	1.5	-0.7	-1.4	-1.0
25–34	2.7	2.5	1.8	-0.8	-0.8	-0.7
35–44	2.6	1.9	1.5	-0.6	-0.5	-0.5
45–54	2.5	1.8	1.6	-0.4	-0.3	-0.3
55+	1.7	1.3	1.2	0.0	0.0	0.0
Total JSA Claimants	2.2	1.9	1.5	-0.6	-0.5	-0.5

Source: JSA Claimant Count/Nomis/Cardiff Research Centre

NB. Data rounded to nearest 5 (disclosure control).

Proportions have been calculated using the rounded number of JSA claimants and the mid-2014 resident population estimates for the appropriate age group. The populations used for the 24 and under, and 55+ categories are those aged 16–24 and 55–64 respectively. Total JSA Claimants uses the population aged 16–64.

5.2 Cardiff's JSA claimant proportions generally compare poorly with both Wales and the UK (see Table 7). The only age group whose rate does not exceed those of both of the larger geographical regions is the 24 and under category, which is below the

equivalent Wales figure. As in Cardiff, the 55+ age group was the only category not to see a reduction in its JSA claimant proportion in Wales and the UK between December 2014 and December 2015. However, the greatest fall in the rate occurred with those aged 24 and under in both Wales (-1.4 percentage points) and the UK (-1.0 percentage points), as opposed to the 25–34 group in the local authority.

5.3 More than half of Cardiff's JSA claimants in December 2015 had been claiming for less than six months (55.7%), as shown in Table 8. However, over a tenth (10.9%) had been claiming for more than three years. This was also the case in both Wales and the UK (see Table 9).

5.4 Between December 2014 and December 2015, all of the JSA claimant durations saw a fall in numbers in Cardiff, with the greatest decline occurring in those claiming for less than six months (-685 people). Despite this, the category conversely experienced a rise in its percentage share of all JSA claimants (1.0 percentage points), although this was below the increase for the 6–12 months duration (1.5 percentage points).

Duration	December 2015		December 2014		Change Dec '14 – Dec '15	
	No.	%	No.	%	No.	% Point
<6mths	2,980	55.7	3,665	54.7	-685	1.0
6–12mths	810	15.1	910	13.6	-100	1.5
1–2yrs	645	12.1	960	14.3	-315	-2.2
2–3yrs	335	6.3	500	7.4	-165	-1.1
>3yrs	580	10.9	670	10.0	-90	0.9
Total	5,350	100.0	6,695	100.0	-1,345	-

Source: JSA Claimant Count/Nomis

NB. Data rounded to nearest 5 (disclosure control).

Percentages have been rounded and therefore may not total 100%.

Duration	December 2015			Change Dec '14 – Dec '15		
	Cardiff %	Wales %	UK %	Cardiff % Point	Wales % Point	UK % Point
<6mths	55.7	53.8	56.8	1.0	-3.0	-0.1
6–12mths	15.1	16.1	14.9	1.5	3.2	1.5
1–2yrs	12.1	12.3	11.7	-2.2	-0.8	-0.8
2–3yrs	6.3	5.8	5.2	-1.1	-1.0	-1.4
>3yrs	10.9	12.0	11.4	0.9	1.6	0.8
Total	100.0	100.0	100.0	-	-	-

Source: JSA Claimant Count/Nomis

NB. Data rounded to nearest 5 (disclosure control).

Percentages have been rounded and therefore may not total 100%.

5.5 As shown in Table 9, a similar situation could be seen in Wales and the UK, with those claiming for 6–12 months seeing the largest percentage point increases. However, whereas there was a rise in the proportion claiming for less than six months in

Cardiff, Wales (-3.0 percentage points) and the UK (-0.1 percentage points) both saw declines. This was the largest reduction in Wales, whereas those claiming for 2–3 years saw the greatest fall in the UK (-1.4 percentage points). In contrast, the largest contraction in the local authority was for those claiming for 1–2 years (-2.2 percentage points).

6.0 Sought Occupation of JSA Claimants

6.1 The sought occupation of JSA claimants in Cardiff in December 2015 can be seen in Table 10, along with comparable figures for Wales and the UK. By far the most popular category in Cardiff was Sales & Customer Service Occupations (55.0%), with more than half of the claimants interested in work of this type, while over a sixth were seeking employment in Elementary Occupations (15.4%). As such, around seven-tenths of claimants were looking for work in either of these professions. These were also the most sought-after occupations in both Wales and the UK, although Sales & Customer Service Occupations was one of only two categories (the other being Administrative & Secretarial Occupations) that was responsible for a greater share of claimants in Cardiff than in both of the larger geographical regions, as shown in Figure 4 (overleaf).

Sought Occupation (SOC2000)	Cardiff		Wales %	UK %
	No.	%		
Managers and Senior Officials	475	8.9	15.5	8.6
Professional Occupations	40	0.7	0.8	1.1
Associate Professional and Technical Occupations	85	1.6	1.3	2.1
Administrative and Secretarial Occupations	405	7.6	6.0	7.0
Skilled Trades Occupations	150	2.8	3.5	4.3
Personal Service Occupations	125	2.3	2.9	3.0
Sales and Customer Service Occupations	2,945	55.0	47.1	48.1
Process, Plant and Machine Operatives	160	3.0	5.0	4.1
Elementary Occupations	825	15.4	14.3	17.9
Occupation Unknown	140	2.6	3.7	3.8
Total	5,350	100.0	100.0	100.0

Source: JSA Claimant Count/Nomis/Cardiff Research Centre

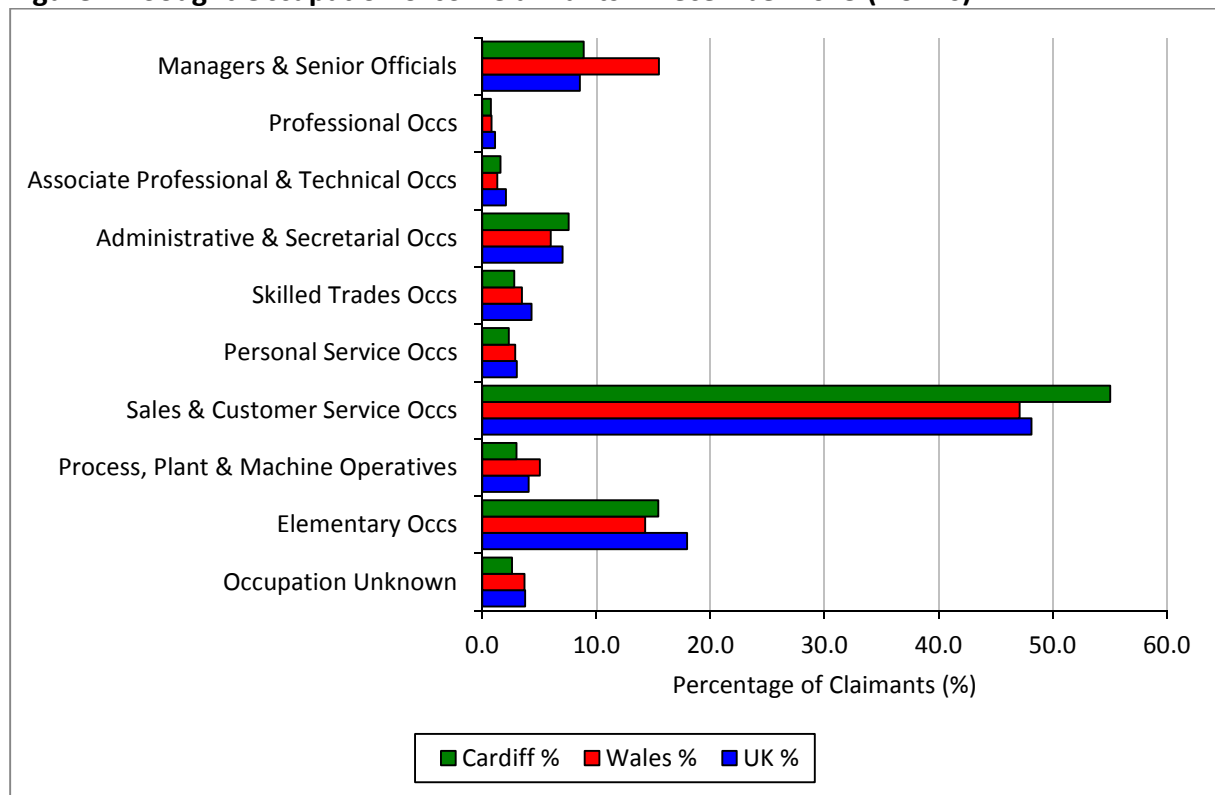
NB. Data rounded to nearest 5 (disclosure control).

Percentages have been calculated using rounded figures and therefore may not total 100%.

6.2 Table 11 shows how the sought occupation of JSA claimants changed between December 2014 and December 2015. The only category in Cardiff to see a growth in numbers over the period was Sales & Customer Service Occupations, while all of the categories (excluding the Occupation Unknown category) in both Wales and the UK contracted in size. However, Sales & Customer Service Occupations saw the largest increase in its proportion of all claimants in Cardiff (13.1 percentage points), Wales (8.1 percentage points) and the UK (8.3 percentage points), despite the overall fall in numbers in the two larger regions. Elementary Occupations, meanwhile, experienced the greatest percentage point fall in its share of total claimants in each of the

areas; -8.6 percentage points in Cardiff, -5.3 percentage points in Wales, and -5.1 percentage points in the UK.

Figure 4: Sought Occupation of JSA Claimants – December 2015 (Nomis)



Sought Occupation (SOC2000)	Cardiff		Wales		UK	
	No.	% Point	No.	% Point	No.	% Point
Managers & Senior Officials	-55	1.0	-275	2.9	-4,845	1.4
Professional Occupations	-50	-0.6	-215	-0.3	-4,605	-0.3
Associate Professional & Technical Occupations	-55	-0.5	-420	-0.6	-10,715	-0.8
Administrative & Secretarial Occupations	-85	0.3	-875	-0.5	-21,390	-1.0
Skilled Trades Occupations	-165	-1.9	-1,175	-1.7	-18,610	-1.3
Personal Service Occupations	-125	-1.4	-860	-1.2	-13,945	-1.0
Sales & Customer Service Occupations	140	13.1	-1,220	8.1	-24,675	8.3
Process, Plant & Machine Operatives	-145	-1.6	-1,510	-2.1	-17,810	-1.2
Elementary Occupations	-785	-8.6	-4,015	-5.3	-76,570	-5.1
Occupation Unknown	-25	0.2	-165	0.5	90	0.9
Total	-1,345	-	-10,725	-	-193,080	-

Source: JSA Claimant Count/Nomis/Cardiff Research Centre

NB. Data rounded to nearest 5 (disclosure control).

Percentages have been calculated using rounded figures and therefore may not total 100%.

7.0 Ethnicity of JSA Claimants

- 7.1 The ethnicity of JSA claimants in Cardiff, Wales and England & Wales in December 2015 can be seen in Table 12, along with comparisons to their respective populations aged 16–64 as a whole. Ethnic minorities comprised 20.0% of the JSA claimants in Cardiff compared with just 14.9% of the population aged 16–64. A similar situation could be seen in England & Wales where 22.6% of claimants belonged to an ethnic minority group compared to 14.4% of the population aged 16–64. However, the difference was less severe in Wales where ethnic minorities accounted for 4.7% of the total population aged 16–64 and 5.3% of claimants.
- 7.2 All but one of the ethnic minority sub-groups in Cardiff also accounted for more than their proportional share of claimants, in particular the Black/African/Caribbean/Black British and Other Ethnic Group categories. Their shares of the local authority’s JSA claimants were more than double those of the working age population as a whole, with them comprising only 2.2% and 1.9% of the total population aged 16–64 but 6.6% and 4.3% of claimants respectively. In comparison, in England & Wales the Black/African/Caribbean/Black British and Other Ethnic Group categories accounted for 9.9% and 2.8% of claimants compared with just 3.4% and 1.1% of the population aged 16–64 respectively.
- 7.3 The only ethnic minority group in Cardiff to have less than their proportional share of JSA claimants was the Asian/Asian British category, as was also the case in both Wales and England & Wales. This accounted for 8.2% of the population aged 16–64 in the local authority but only 5.3% of the claimants. [NB. Please be aware that the population figures are from the 2011 Census and so may not reflect the current breakdown by ethnicity]

Ethnicity	Cardiff			Wales		England & Wales	
	No.	Claimant %	Population Aged 16–64 %	Claimant %	Population Aged 16–64 %	Claimant %	Population Aged 16–64 %
White	4,000	80.0	85.1	94.8	95.3	77.4	85.6
Ethnic Minority:	1,000	20.0	14.9	5.3	4.7	22.6	14.4
Mixed/ Multiple	195	3.9	2.5	1.0	0.9	2.5	1.8
Asian/ Asian British	265	5.3	8.2	1.5	2.6	7.4	8.1
Black/ African/ Caribbean/ Black British	330	6.6	2.2	1.6	0.7	9.9	3.4
Other Ethnic Group	215	4.3	1.9	1.2	0.5	2.8	1.1
Unknown	115	–	–	–	–	–	–
Prefer not to say	235	–	–	–	–	–	–

Source: JSA Claimant Count/Nomis/ONS/Cardiff Research Centre; Population % – 2011 Census

NB. Data rounded to nearest 5 (disclosure control).

Claimant percentages have been calculated from rounded figures and therefore may not total 100%.

Percentage calculations exclude ‘Unknown’ & ‘Prefer not to say’ categories.

Those identifying themselves as Chinese have been included in the Asian/Asian British category as per the 2011 Census classifications.

7.4 Table 13 shows the change in the ethnicity of JSA claimants between December 2014 and December 2015, with all of the groups (excluding the unknown and prefer not to say categories) in each of the areas seeing a fall in numbers over the year. Despite their numbers decreasing, the proportion of claimants belonging to an ethnic minority group grew across Cardiff (0.4 percentage points). This was also the case in both Wales (0.2 percentage points) and England & Wales (1.6 percentage points), and was due to the number of White claimants contracting at a faster rate. Of the ethnic minority groups in Cardiff, the Other Ethnic Group (-0.3 percentage points) was the only one to see a reduction in its percentage share over the year, while none of the ethnic minorities contracted in either Wales or England & Wales. The Black/African/Caribbean/Black British groups had by far the greatest expansion in England & Wales (1.2 percentage points) and was also saw the joint-greatest increase in its share (along with the Mixed/Multiple group) in Cardiff (0.3 percentage points). Meanwhile, in Wales, this category was one of only two ethnic minorities to see its proportion of all JSA claimants change over the year with its increase of 0.1 percentage points matching that of the Asian/Asian British group.

Ethnicity	Cardiff		Wales		England & Wales	
	No.	% Point	No.	% Point	No.	% Point
White	-1,015	-0.4	-9,760	-0.2	-124,640	-1.6
Ethnic Minority:	-225	0.4	-440	0.2	-23,310	1.6
Mixed/ Multiple	-30	0.3	-100	0.0	-3,200	0.1
Asian/ Asian British	-55	0.2	-125	0.1	-9,035	0.3
Black/ African/ Caribbean/ Black British	-65	0.3	-105	0.1	-7,100	1.2
Other Ethnic Group	-70	-0.3	-110	0.0	-3,980	0.0
Unknown	5	–	-95	–	-3,330	–
Prefer not to say	-110	–	-430	–	-11,510	–

Source: JSA Claimant Count/Nomis/Cardiff Research Centre

NB. Data rounded to nearest 5 (disclosure control).

Percentages have been calculated from rounded figures.

Percentage calculations exclude 'Unknown' & 'Prefer not to say' categories.

Those identifying themselves as Chinese have been included in the Asian/Asian British category as per the 2011 Census classifications.

8.0 ILO Unemployment

8.1 ILO (International Labour Organisation) unemployment differs from the JSA claimant count and is defined as, 'those not in employment who have actively sought work in the previous four weeks and are available to start work in the next fortnight, or are out of work and have accepted a job which they are waiting to start in the next fortnight'. In contrast, the JSA claimant count measures only those people who are claiming Jobseeker's Allowance and is always the lower measure because some unemployed people are not entitled to claim benefits, or choose not to do so. Furthermore, the ILO unemployment rate is based on the resident economically

active population whereas the JSA claimant proportion is calculated using the population aged 16–64.

8.2 Table 14 shows the ILO unemployment numbers and rates (expressed as a percentage of the economically active population aged 16 and over) from the October 2014 – September 2015 Annual Population Survey (produced quarterly) for the ten local authorities in South East Wales as well as Wales and Great Britain. Comparative figures for the same period in the previous year are also displayed. According to the October 2014 – September 2015 survey, Cardiff’s (model-based) ILO unemployment rate was 7.9%. This was the joint-second highest figure out of the local authorities in South East Wales and exceeded the rates of both Wales (6.3%) and Great Britain (5.4%).

8.3 Cardiff’s rate and comparative position has deteriorated since the October 2013 – September 2014 survey, when it had the fourth lowest rate in South East Wales of 7.5%, following an increase of 0.4 percentage points. In contrast, all of the other nine local authorities saw their rate decline. Wales and Great Britain also both saw decreases of 0.6 and 1.1 percentage points respectively.

Area	October '14 – September '15 (%)	October '13 – September '14 (%)	Change Oct '13 – Sep '14 to Oct '14 – Sep '15 (% Point)
Blaenau Gwent	9.0	11.1	-2.1
Caerphilly	7.9	8.0	-0.1
Cardiff	7.9	7.5	0.4
Newport	7.6	8.5	-0.9
Rhondda, Cynon, Taff	7.0	7.9	-0.9
Merthyr Tydfil	6.9	8.4	-1.5
Torfaen	6.6	8.6	-2.0
Bridgend	6.3	6.9	-0.6
Vale of Glamorgan	5.6	6.2	-0.6
Monmouthshire	4.1	4.8	-0.7
Wales	6.3	6.9	-0.6
Great Britain	5.4	6.5	-1.1

Source: Annual Population Survey/Nomis

NB. Local Authority Rates are Model-based estimates of unemployment.

ECONOMIC ACTIVITY, EMPLOYMENT & THE LABOUR FORCE IN CARDIFF

9.0 Economic Activity

9.1 According to the October 2014 – September 2015 Annual Population Survey, the economic activity rate of the resident population aged 16–64 in Cardiff is 73.7% (see Table 15). This is the second lowest rate in South East Wales, and also compares poorly with the figures for both Wales (75.1%) and the UK (77.5%).

9.2 Cardiff's relative position in South East Wales has remained unchanged since the October 2013 – September 2014 survey, when it also had the second lowest economic activity rate in the area. Over the year, its rate increased slightly by 0.1 percentage points; below the expansions in Wales and the UK (both 0.3 percentage points).

Area	October '14 – September '15 (%)	October '13 – September '14 (%)	Change Oct '13 – Sep '14 to Oct '14 – Sep '15 (% Point)
Monmouthshire	79.3	79.2	0.1
Vale of Glamorgan	78.1	77.6	0.5
Bridgend	76.3	75.4	0.9
Torfaen	76.1	74.8	1.3
Newport	75.5	74.8	0.7
Rhondda, Cynon, Taff	74.5	75.6	-1.1
Blaenau Gwent	73.8	74.4	-0.6
Merthyr Tydfil	73.8	72.5	1.3
Cardiff	73.7	73.6	0.1
Caerphilly	72.0	74.3	-2.3
Wales	75.1	74.8	0.3
United Kingdom	77.5	77.2	0.3

Source: Annual Population Survey/Nomis

9.3 Cardiff's rate is somewhat lower than would at first be expected and is largely due to the number of full-time students aged 16+ living in the city. However, it is important to remember that not all full-time students are economically inactive as many have part-time employment.

10.0 Economic Inactivity

10.1 The reasons for economic inactivity in Cardiff by the resident population aged 16–64 can be seen in Table 16. According to the October 2014 – September 2015 Annual Population Survey, over two-fifths (42.6%) are inactive due to them being students, while almost a quarter (23.8%) are long-term sick, and around one-in-seven (14.4%) are looking after their family/home. Compared with the October 2013 – September 2014 survey, the largest decrease was seen by those looking after their family/home, both in terms of numbers (-3,400) and its percentage share (-5.4 percentage points) of the total economically inactive population. In contrast, those that are inactive due to long-term sickness experienced the greatest increase of 3,600 people and 6.0 percentage points.

Reason	October '14 – September '15		October '13 – September '14		Change Oct '13 – Sep '14 to Oct '14 – Sep '15	
	No.	%	No.	%	No.	% Point
Student	26,800	42.6	24,200	38.3	2,600	4.3
Looking after family/home	9,100	14.4	12,500	19.8	-3,400	-5.4
Long-term sick	14,900	23.8	11,300	17.8	3,600	6.0
Retired	5,200	8.4	5,800	9.1	-600	-0.7
Other	6,800	10.8	9,400	14.9	-2,600	-4.1
Total	62,700	100.0	63,200	100.0	-500	–

Source: Annual Population Survey/Nomis

NB. Percentages have been rounded and therefore may not total 100%.

'Other' includes Temporary Sick, Discouraged, and Other Reasons.

10.2 Table 17 shows that the proportion of the economically inactive population who are students is much lower in both Wales (25.4%) and the UK (26.2%) than in Cardiff (42.6%). However, it is still the most frequent reason for inactivity in the UK and the second most common reason in Wales, just behind the long-term sick. Compared with the previous year, the retired saw the greatest decline in its share of the inactive population in the UK (-0.8 percentage points), while the 'other' category saw the highest growth of 0.9 percentage points. In Wales, the long-term sick saw the greatest expansion (1.8 percentage points) and those looking after their family/home suffered the largest reduction (-1.2 percentage points), as was also the case in the local authority.

Table 17: Reasons for Economic Inactivity of Resident Population Aged 16–64 (Oct 2013 – Sep 2014 to Oct 2014 – Sep 2015)						
Reason	October '14 – September '15			Change Oct '13 – Sep '14 to Oct '14 – Sep '15		
	Cardiff %	Wales %	UK %	Cardiff % Point	Wales % Point	UK % Point
Student	42.6	25.4	26.2	4.3	-0.4	-0.5
Looking after family/home	14.4	20.6	25.3	-5.4	-1.2	0.1
Long-term sick	23.8	27.8	22.1	6.0	1.8	0.3
Retired	8.4	15.0	13.9	-0.7	-0.1	-0.8
Other	10.8	11.2	12.5	-4.1	-0.2	0.9
Total	100.0	100.0	100.0	-	-	-

Source: Annual Population Survey/Nomis

NB. Percentages have been rounded and therefore may not total 100%.

'Other' includes Temporary Sick, Discouraged, and Other Reasons.

10.3 Just over a quarter (26.1%) of the economically inactive population in Cardiff want a job, according to the October 2014 – September 2015 Annual Population Survey, as shown in Table 18. This represents a decline of 0.8 percentage points since the October 2013 – September 2014 survey, when this figure stood at 26.9%.

Table 18: Economically Inactive in Cardiff: Want a Job v Do Not Want a Job (Oct 2013 – Sep 2014 to Oct 2014 – Sep 2015)						
Economically Inactive	October '14 – September '15		October '13 – September '14		Change Oct '13 – Sep '14 to Oct '14 – Sep '15	
	No.	%	No.	%	No.	% Point
Want a job	16,400	26.1	17,000	26.9	-600	-0.8
Do not want a job	46,400	73.9	46,200	73.1	200	0.8
Total	62,700	100.0	63,200	100.0	-500	-

Source: Annual Population Survey/Nomis

NB. Percentages have been rounded and therefore may not total 100%.

Table 19: Economically Inactive: Want a Job v Do Not Want a Job (Oct 2013 – Sep 2014 to Oct 2014 – Sep 2015)						
Economically Inactive	October '14 – September '15			Change Oct '13 – Sep '14 to Oct '14 – Sep '15		
	Cardiff %	Wales %	UK %	Cardiff % Point	Wales % Point	UK % Point
Want a job	26.1	25.9	24.0	-0.8	-0.1	-0.7
Do not want a job	73.9	74.1	76.0	0.8	0.1	0.7
Total	100.0	100.0	100.0	-	-	-

Source: Annual Population Survey/Nomis

NB. Percentages have been rounded and therefore may not total 100%.

10.4 The proportion of the economically inactive population wanting a job in Cardiff (26.1%) is above the equivalent figures for Wales (25.9%) and the UK (24.0%), as can be seen in Table 19. This was also the case a year previously despite Cardiff's figure suffering the largest percentage point decline over the period; falling by 0.8 percentage points, compared with 0.1 percentage points in Wales and 0.7 percentage points in the UK.

11.0 Employment Rate

11.1 According to the October 2014 – September 2015 Annual Population Survey, Cardiff has the third lowest employment rate (68.2%) for the resident population aged 16–64 in South East Wales (see Table 20), and is below the comparative figures for both Wales (70.3%) and the UK (73.2%).

Area	October '14 – September '15 (%)	October '13 – September '14 (%)	Change Oct '13 – Sep '14 to Oct '14 – Sep '15 (% Point)
Monmouthshire	76.4	74.6	1.8
Vale of Glamorgan	73.4	71.4	2.0
Torfaen	70.8	67.3	3.5
Bridgend	70.4	69.6	0.8
Newport	70.4	68.8	1.6
Merthyr Tydfil	69.0	66.3	2.7
Rhondda, Cynon, Taff	68.9	69.3	-0.4
Cardiff	68.2	69.0	-0.8
Blaenau Gwent	67.0	64.7	2.3
Caerphilly	66.1	68.3	-2.2
Wales	70.3	69.5	0.8
United Kingdom	73.2	72.1	1.1

Source: Annual Population Survey/Nomis

11.2 Cardiff's relative position in South East Wales has also worsened since the October 2013 – September 2014 survey, when it had the fifth highest employment rate in the region. It was one of just three local authorities to see a decrease over the year, with its reduction of 0.8 percentage points only comparing favourably with Caerphilly. Wales and the United Kingdom, meanwhile, saw their rates rise by 0.8 and 1.1 percentage points respectively.

12.0 Employment by Broad Industrial Sector

12.1 Figures from the Office for National Statistics' (ONS) 2014 Business Register and Employment Survey³ (BRES) show that there were 200,400⁴ persons working in Cardiff (see Table 21). Health (13.9%) was the main employment sector and was also the greatest employer in Wales (15.6%) and Great Britain (13.1%). Retail was the second biggest sector in Cardiff (10.8%) and Great Britain (10.0%), as well as the third largest employer in Wales (10.5%). However, the share employed locally in Manufacturing was significantly below the levels seen in the larger regions. It was the second highest employer in Wales (11.5%) and the joint-fifth in Great Britain (8.2%), but only the tenth largest sector in Cardiff (4.7%). In contrast, levels of employment

³ NB. Those who carried out the original collection and analysis of the data bear no responsibility for the further analysis or interpretation.

⁴ This figure is an aggregate from which farm agriculture (SIC subclass 01000) has been excluded.

in the Financial & Insurance sector were much greater within the local authority. In addition, other large disparities can be seen in both the Business Administration & Support Services; and Professional, Scientific & Technical sectors, where employment was much higher in Cardiff than in Wales, as well as Public Administration & Defence, which was more important locally than across Great Britain as a whole.

Industrial Sector (SIC 07)	Cardiff		Wales %	Great Britain %
	No.	%		
Agriculture, Forestry & Fishing*	100	0.0	5.0	1.6
Mining, Quarrying & Utilities	4,200	2.1	1.5	1.2
Manufacturing	9,500	4.7	11.5	8.2
Construction	7,600	3.8	4.7	4.6
Motor Trades	2,400	1.2	1.4	1.8
Wholesale	5,500	2.7	2.4	4.0
Retail	21,600	10.8	10.5	10.0
Transport & Storage (inc postal)	5,900	3.0	3.4	4.4
Accommodation & Food Services	14,000	7.0	7.2	7.1
Information & Communication	6,400	3.2	2.2	4.0
Financial & Insurance	14,000	7.0	2.3	3.6
Property	3,400	1.7	1.5	1.8
Professional, Scientific & Technical	13,800	6.9	4.2	8.2
Business Administration & Support Services	20,100	10.0	6.1	8.5
Public Administration & Defence	15,000	7.5	6.7	4.4
Education	19,300	9.6	9.8	8.9
Health	27,800	13.9	15.6	13.1
Arts, Entertainment, Recreation & Other Services	9,800	4.9	4.2	4.4
Total Employment	200,400	100.0	100.0	100.0

Source: Business Register and Employment Survey/Nomis/ONS/Cardiff Research Centre

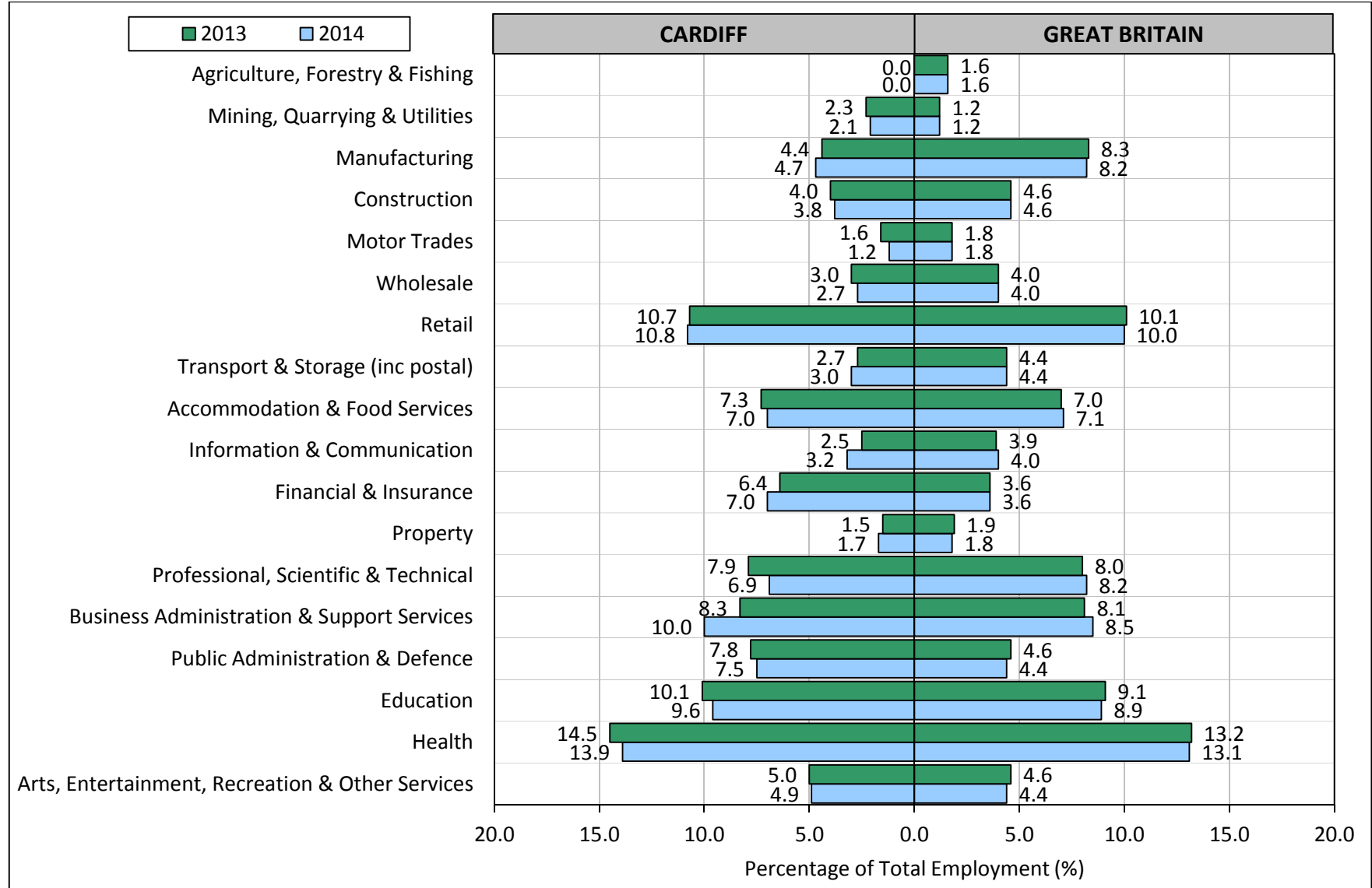
* Cardiff figures exclude farm agriculture (SIC subclass 01000).

NB. Cardiff employment totals rounded to the nearest 100 (disclosure control). Percentages for all regions have been calculated from unrounded figures.

12.2 In Cardiff, total employment increased by 2,000 jobs or 1.0% over the period compared with a rise of 2.7% in Great Britain (see Table 22). Only 8 of the 18 sectors in the local authority saw an increase in their workforce over the year, with the greatest expansion occurring in Business Administration & Support Services (3,500 people). This sector also saw the largest growth in the percentage share of total employment of 1.7 percentage points (see Figure 5, which shows the share of total employment by industrial sector in Cardiff and Great Britain in 2013 and 2014), as well as the second greatest percentage rise in employees of 21.4% – behind only the Information & Communication sector (28.8%)⁵. The number employed in Property, meanwhile, also grew by 15.0%.

⁵ Agriculture, Forestry & Fishing had the largest increase of 196.2% but this has been disregarded due to the very small numbers involved.

Figure 5: Share of Total Employment by Broad Industrial Sector in Cardiff & Great Britain 2013–2014 (BRES, ONS)



12.3 Business Administration & Support Services also experienced the greatest numerical and percentage share (0.4 percentage points) increases in Great Britain, as well as the highest percentage growth in numbers (7.6%); although these are well below the comparative figures for Cardiff. However, in contrast to the large increase in Cardiff, Property (-1.0%) was one of only three sectors in Great Britain to see a fall in numbers, with the others being Public Administration & Defence (-2.1%) and Arts, Entertainment, Recreation & Other Services (-0.2%). Public Administration & Defence; and Arts, Entertainment, Recreation & Other Services; together with Education, also saw the joint-largest decline in the share of total employment of 0.2 percentage points.

12.4 The greatest numerical and percentage share contractions in Cardiff were in the Professional, Scientific & Technical sector, whose numbers fell by 1,800 and its percentage share of total employment by 1.0 percentage points. It also saw the second largest percentage decline (-11.7%) in terms of the number in employment, behind only Motor Trades (-20.6%). In contrast, there were increases of 5.2% and 4.0%, respectively, across Great Britain as a whole. A similar discrepancy, where employment numbers fell in Cardiff despite increasing across Great Britain, can also be seen in several of the other sectors, namely, Mining, Quarrying & Utilities; Construction; Wholesale; Accommodation & Food Services; Education; and Health.

Industrial Sector (SIC 07)	Cardiff		Wales %	Great Britain %
	No.	%		
Agriculture, Forestry & Fishing*	100	196.2	14.9	4.9
Mining, Quarrying & Utilities	-400	-8.1	-8.3	2.1
Manufacturing	800	8.9	5.3	2.2
Construction	-300	-4.3	5.8	3.5
Motor Trades	-600	-20.6	-25.5	4.0
Wholesale	-400	-6.4	-10.7	1.7
Retail	400	2.1	0.6	2.2
Transport & Storage (inc postal)	500	9.4	10.5	3.9
Accommodation & Food Services	-500	-3.5	-2.6	3.4
Information & Communication	1,400	28.8	30.0	5.0
Financial & Insurance	1,400	10.7	-2.1	1.9
Property	500	15.0	18.8	-1.0
Professional, Scientific & Technical	-1,800	-11.7	-12.2	5.2
Business Administration & Support Services	3,500	21.4	15.9	7.6
Public Administration & Defence	-500	-3.3	-2.2	-2.1
Education	-800	-3.9	-0.7	1.0
Health	-1,000	-3.5	1.1	1.9
Arts, Entertainment, Recreation & Other Services	-200	-2.1	2.3	-0.2
Total Employment	2,000	1.0	1.8	2.7

Source: Business Register and Employment Survey/Nomis/ONS/Cardiff Research Centre

* Cardiff figures exclude farm agriculture (SIC subclass 01000).

NB. Cardiff employment totals rounded to the nearest 100 (disclosure control). Percentages for all regions have been calculated from unrounded figures.

13.0 Earnings

- 13.1 The Annual Survey of Hours and Earnings is published annually by ONS and highlights average earnings. The provisional 2015 figures for median gross weekly full-time earnings in Cardiff, Wales and the UK are shown in Tables 23 (resident-based) and 24 (workplace-based), together with their respective annual percentage changes. (NB. These figures do not take into account the number of hours worked on average each week)
- 13.2 The resident-based median gross weekly full-time earnings for all workers in Cardiff (£510.20) are 5.3% higher than the Welsh average (£484.40), but 3.3% below the UK figure of £527.70 (see Table 23). Similarly, on average, Cardiff's full-time females earn more than their Welsh counterparts but less than the UK as a whole. However, male full-time earnings are highest in Cardiff. In terms of annual percentage change, the median pay of total (2.8%) and male (3.1%) full-time workers in Cardiff have both increased over the year, whereas females have suffered a slight decline (-0.3%). In comparison, there were increases across Wales and the UK in each of these categories, although the total and male growth rates were slower than in the local authority.

Full-Time Workforce	Median Gross Weekly Earnings (£)			Annual Percentage Change (%)		
	Cardiff	Wales	United Kingdom	Cardiff	Wales	United Kingdom
All Full-Time Workers:	510.2	484.4	527.7	2.8	0.9	1.8
Male Full-Time	567.9	517.4	567.2	3.1	1.1	1.5
Female Full-Time	440.0	431.1	471.2	-0.3	1.5	2.1

Source: Annual Survey of Hours and Earnings/Nomis/ONS

- 13.3 Workplace-based earnings in Cardiff again compare favourably against Wales, while falling below the levels seen across the UK as a whole (see Table 24). The median gross weekly earnings of the total full-time workforce in Cardiff (£499.20) are 5.4% above the Wales figure but 5.4% below that of the UK. In contrast to the residence-based pay, none of Cardiff's total (-1.0%), male (0.0%), and female (-3.5%) full-time workforces have seen a rise in earnings over the year, whereas these all increased across the UK.

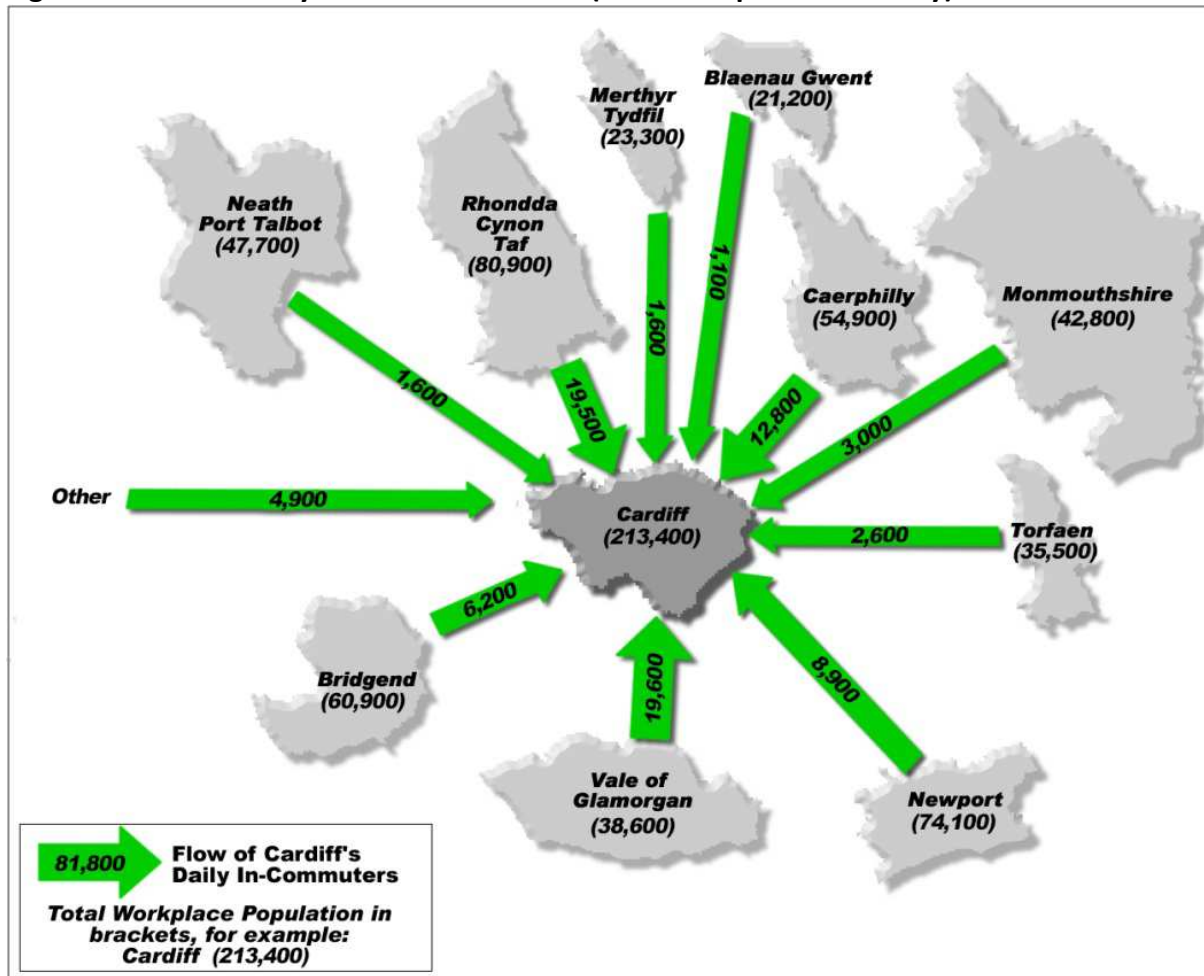
Full-Time Workforce	Median Gross Weekly Earnings (£)			Annual Percentage Change (%)		
	Cardiff	Wales	United Kingdom	Cardiff	Wales	United Kingdom
All Full-Time Workers:	499.2	473.4	527.7	-1.0	-0.1	1.8
Male Full-Time	535.8	508.3	567.2	0.0	1.4	1.5
Female Full-Time	436.9	426.2	471.2	-3.5	1.0	2.1

Source: Annual Survey of Hours and Earnings/Nomis/ONS

14.0 Commuting

14.1 Cardiff has long been a major regional employment centre, due partly to the concentration of administrative centres associated with its capital city status and the greater diversity of employment opportunities resulting from the city's historical economic development. This is closely connected to its advantageous geographical location in Wales as well as transportation infrastructure such as the M4 motorway, the port and intercity rail links with most of the UK's major cities.

Figure 6: Cardiff's Daily In-Commuters 2014 (Annual Population Survey)

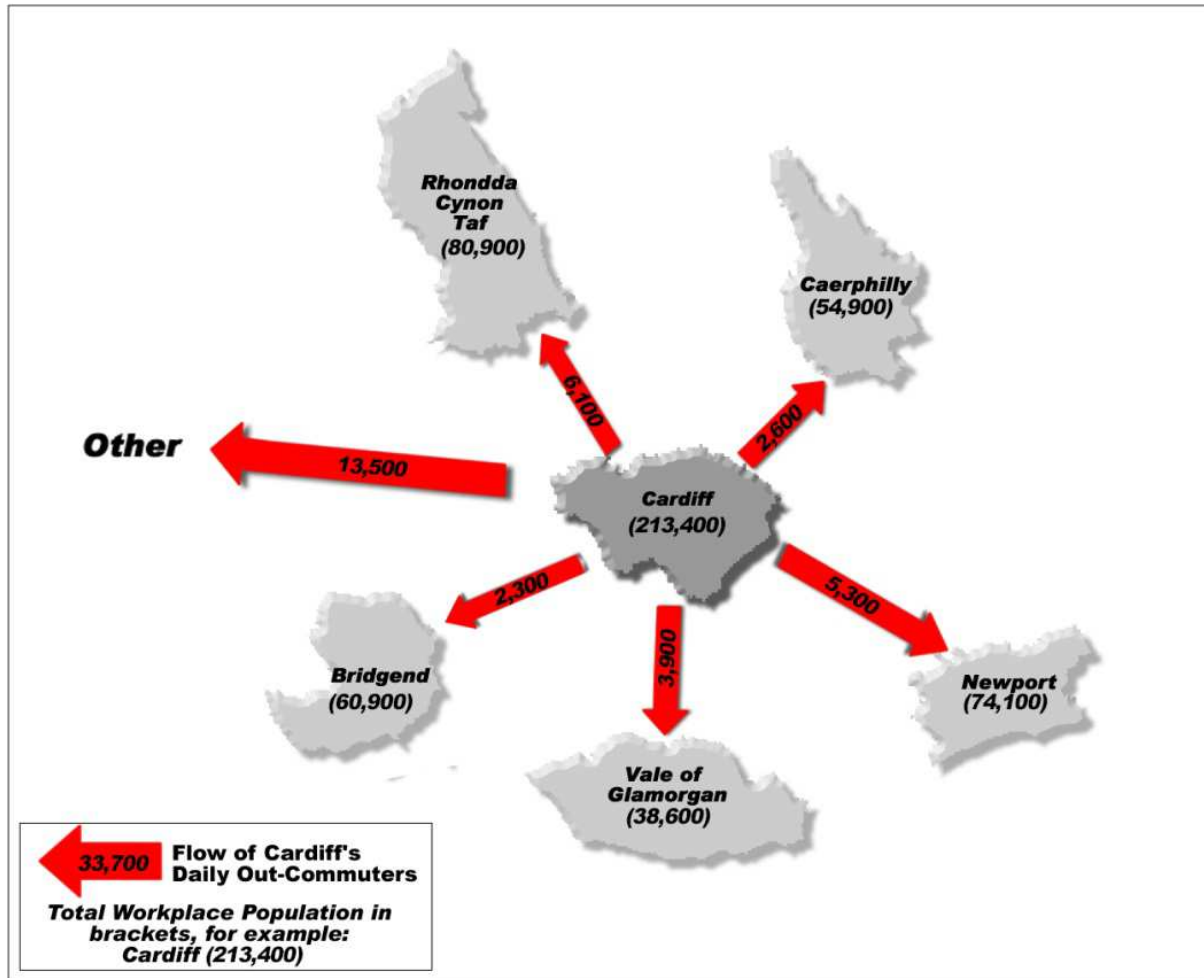


Source: Annual Population Survey/ONS/Welsh Government/StatsWales

NB. All in-commuting data rounded to the nearest 100. Therefore, the sum of the parts may not equal the total.

14.2 The latest statistics available on commuting from the Welsh Government show the large numbers of in-commuters to Cardiff from outside its local authority boundaries. These workplace statistics cover those in employment and are based solely on a person's main job. An estimated 60,800 commute in to Cardiff from the neighbouring local authority areas of the Vale of Glamorgan, Rhondda Cynon Taff, Caerphilly and Newport alone, while a further 21,000 commute to the city daily from further afield. (see Figure 6).

Figure 7: Cardiff's Daily Out-Commuters 2014 (Annual Population Survey)



Source: Annual Population Survey/ONS/Welsh Government/StatsWales

NB. All out-commuting data rounded to the nearest 100. Therefore, the sum of the parts may not equal the total.

14.3 As expected, out-commuting from Cardiff by those residing in the city is less pronounced (see Figure 7). It is estimated that there are a total of 33,700 daily out-commuters, including approximately 6,100 who work in Rhondda Cynon Taff, 5,300 in Newport, 3,900 in the Vale of Glamorgan, 2,600 in Caerphilly, and 2,300 in Bridgend. Cardiff's official Travel-To-Work Area (TTWA) includes a large part of the Vale of Glamorgan and the southern parts of Caerphilly and Rhondda Cynon Taff but is not shown in Figures 6 or 7.

15.0 Jobs Density

15.1 Jobs density is defined as the total number of filled jobs in an area divided by the resident population aged 16–64 of that area. Table 25 shows that, in 2013, Cardiff (0.91) had the highest jobs density of the ten local authorities in South East Wales, a position it also held in 2008, and was above the figures for both Wales (0.72) and the UK (0.79). This gives further evidence to Cardiff being an area of inward-commuting. However, Cardiff was one of five areas in South East Wales to see their jobs density decline over the five-year period. In contrast, there was an increase across Wales as a whole, while the UK saw no change.

Area	2013	2008	Change 2008–2013
Cardiff	0.91	0.93	-0.02
Newport	0.81	0.89	-0.08
Monmouthshire	0.73	0.75	-0.02
Bridgend	0.70	0.70	0.00
Torfaen	0.70	0.67	0.03
Merthyr Tydfil	0.62	0.67	-0.05
Vale of Glamorgan	0.58	0.55	0.03
Rhondda, Cynon, Taff	0.57	0.54	0.03
Caerphilly	0.54	0.52	0.02
Blaenau Gwent	0.47	0.48	-0.01
Wales	0.72	0.70	0.02
United Kingdom	0.79	0.79	0.00

Source: Jobs Density/Nomis

16.0 Gross Value Added

16.1 Gross Value Added (GVA) is used as a key indicator of general economic health and vitality for regions and sub-regions. Unfortunately, there are no official published figures of the total GVA of the Cardiff economy alone and, consequently, no official estimates of the GVA per head. However, ONS do publish figures for Cardiff and the Vale of Glamorgan local authority areas combined. The provisional ONS (Income Approach) figures for 2014 are highlighted in Table 26.

Location	Gross Value Added	Gross Value Added Per Head	GVA per Head Index (UK=100)
Cardiff and the Vale of Glamorgan	£10.655 billion	£22,107	89.8
Wales	£54.336 billion	£17,573	71.4
United Kingdom ⁶	£1,590.113 billion	£24,616	100.0

Source: ONS

⁶ Figures are for United Kingdom less Extra-Regio and statistical discrepancy

- 16.2 In 2014, Cardiff and the Vale of Glamorgan accounted for almost a fifth (19.6%) of Wales' total GVA. In addition, GVA per head (£22,107), calculated by dividing a location's total GVA estimate for a given year by the relevant contemporaneous resident population estimate for that area, exceeded the Wales figure (£17,573), although it was below the UK average (£24,616). A large proportion of the greater Cardiff workforce are net in-commuters which partly accounts for the higher GVA⁷ per head figure for Cardiff and the Vale of Glamorgan than for Wales as a whole.
- 16.3 Between 2009 and 2014 GVA per head increased by 7.1% in Cardiff and the Vale of Glamorgan. In comparison, Wales and the UK saw larger expansions of 13.8% and 15.7%, respectively, over the same period.

17.0 Active Enterprises

- 17.1 According to the 2014 Business Demography, the number of active enterprises (i.e. businesses that had either turnover or employment at any time during the reference period) in Cardiff had increased by 715 since 2013, as shown in Table 27. There was also a net increase of 12.0% (1,230 enterprises) between 2009 and 2014, despite the number of enterprises falling in 2011. Similarly, the UK also experienced a loss in 2011 but an overall expansion from 2009 to 2014 of 8.9%. Wales, meanwhile, saw a much smaller increase of 1.4% between 2009 and 2014, due to it suffering a reduction in the number of active enterprises in three of the last five years.

Date	Cardiff		Wales		UK	
	Enterprises Active During Year	Net Change Over Previous Year	Enterprises Active During Year	Net Change Over Previous Year	Enterprises Active During Year	Net Change Over Previous Year
2009	10,285	–	91,125	–	2,341,900	–
2010	10,340	55	90,435	-690	2,351,425	9,525
2011	10,255	-85	88,590	-1,845	2,342,595	-8,830
2012	10,280	25	87,985	-605	2,372,960	30,365
2013	10,800	520	89,750	1,765	2,448,745	75,785
2014	11,515	715	92,445	2,695	2,550,890	102,145
Change 2009–14	1,230	–	1,320	–	208,990	–
% Change 2009–14	12.0%	–	1.4%	–	8.9%	–

Source: Business Demography/ONS/Cardiff Research Centre

NB. Data rounded to nearest 5 (disclosure control). Percentage change has been calculated using rounded data.

⁷ Typically employee salaries account for between 60% and 65% of GVA.

18.0 Skills and Qualifications

18.1 The highest level of qualification attained by the population aged 16–64 in Cardiff, Wales and the UK, according to the January – December 2014 Annual Population Survey, can be seen in Table 28. The percentage of Cardiff’s population aged 16–64 with an NVQ4 or higher (46.0%) is significantly above both the Wales (33.2%) and UK (35.8%) averages. Similarly, Cardiff also has the highest proportion qualified to NVQ3+ (65.8%)⁸, NVQ2+ (77.6%) and NVQ1+ (86.8%), as well as with Other Qualifications (6.6%). In addition, the percentage share with No Qualifications is smaller in Cardiff (6.6%) than in Wales (10.0%) and the UK (9.0%). However, the local authority has the smallest proportion with Trade Apprenticeships (2.2%).

Highest Qualification	Cardiff		Wales %	UK %
	No.	%		
NVQ4+	109,900	46.0	33.2	35.8
NVQ3	42,200	17.6	18.2	17.2
Trade Apprenticeships	5,200	2.2	3.8	3.5
NVQ2	28,200	11.8	17.4	16.6
NVQ1	22,100	9.3	11.6	11.7
Other Qualifications	15,800	6.6	6.0	6.2
None	15,700	6.6	10.0	9.0
Total	239,000	100.0	100.0	100.0

Source: Annual Population Survey/Nomis

18.2 Cardiff’s position as a centre for higher education with a full-time student population of some 30,000, many of whom remain in Cardiff after graduation to live and work, partly accounts for the high proportion of resident population with NVQ4 and above.

Highest Qualification	Cardiff		Wales		UK	
	No.	% Point	No.	% Point	No.	% Point
NVQ4+	19,200	7.6	36,100	1.9	401,600	0.9
NVQ3	-2,900	-1.5	-7,300	-0.3	95,800	0.2
Trade Apprenticeships	-2,400	-1.0	-2,100	-0.1	-31,200	-0.1
NVQ2	-8,100	-3.6	-3,200	-0.1	-51,300	-0.2
NVQ1	-600	-0.3	-3,400	-0.1	-70,200	-0.2
Other Qualifications	1,500	0.6	-9,200	-0.5	-37,400	-0.1
No Qualifications	-3,600	-1.6	-12,300	-0.6	-243,600	-0.6

Source: Annual Population Survey/Nomis

18.3 The share of Cardiff’s population aged 16–64 qualified to NVQ4 and above has grown substantially (7.6 percentage points) since the January – December 2013 Annual Population Survey, while the proportion with No Qualifications has contracted by 1.6 percentage points (see Table 29). This suggests that Cardiff’s working age population

⁸ Includes Trade Apprenticeships.

has generally become more qualified over the twelve-month period. In comparison, Wales and the UK saw much smaller increases in the percentage share qualified to NVQ 4+ of 1.9 and 0.9 percentage points, respectively, as well as smaller reductions in the proportion with No Qualifications (both -0.6 percentage points).

MAJOR PLANNING PERMISSIONS IN CARDIFF

19.0 Industrial and Commercial Planning Permissions

19.1 A list of the major industrial and commercial planning permissions that were granted in Cardiff between July and December 2015 can be seen in Table 30 below.

Table 30: Major Industrial & Commercial Planning Permissions in Cardiff (July – December 2015)	
INDUSTRY/STORAGE/DISTRIBUTION:	
Application No. 15/01294/MJR Applicant: Castle Waste Services Limited Proposal: THE PROPOSAL IS FOR THE ERECTION OF 2 OFF GALVANISED STEEL PRE-FABRICATED BUILDINGS 14M X 55M AND 7M TALL. THE WORKS WILL IMPROVEMENT TO THE SURFACING OF THE SITE AND WILL ALSO INCLUDE PROVISION OF A BOUNDARY TREATMENT AND. THE BUILDINGS WILL BE USED TO HOUSE EQUIPMENT WHICH IS USED IN THE PRODUCTION OF PRE-CAST CONCRETE PRODUCTS. At: Castle Environmental Ltd, Old Clipper Road, Cardiff Bay, Cardiff, CF10 4LX Decision: Full Planning Permission Decision Date: 04/12/2015	
RETAIL (A1-A3):	
Application No. 14/02405/MJR Applicant: Rightacres Property Company Limited Proposal: DEMOLITION OF MARLAND HOUSE, FULL PLANNING APPLICATION FOR MEDIA CENTRE, GROUND FLOOR RETAIL AND CAFE UNITS (USE CLASSES A1 A2 A3) ROOF-TOP PLANT, SATELLITE DISHES AND PHOTO VOLTAIC PANELS (PLOT 3) BASEMENT CAR PARKING TO PLOTS 2 AND 3, PUBLIC REALM AND LANDSCAPING, AND RELATED INFRASTRUCTURE AND ENGINEERING WORKS. OUTLINE APPLICATION FOR UP TO 14,550SQM GROSS CLASS B1 (A) OFFICE FLOORSPACE (PLOT2) WITH ALL MATTERS RESERVED EXCEPT ACCESS. At: Land to North of Cardiff Central Railway Station Incorporating Cardiff Bus Station, Marland House and Wood Street, Cardiff Decision: Hybrid Application Decision Date: 13/08/2015	

Application No.	14/01338/DCO
Applicant:	Lidl UK GmbH
Proposal:	DEMOLITION OF EXISTING BUILDINGS (INCLUDING SKITTLE ALLEY TO THE REAR OF THE PINEAPPLE INN) AND CONSTRUCTION OF LIDL FOOD STORE WITH ASSOCIATED CAR PARKING, ACCESS AND SERVICING.
At:	James & Jenkins Garages Ltd, 27-37 Station Road, Llandaff North, Cardiff, CF14 2FB
Decision:	Full Planning Permission
Decision Date:	13/11/2015

Source: Development Control, City of Cardiff Council