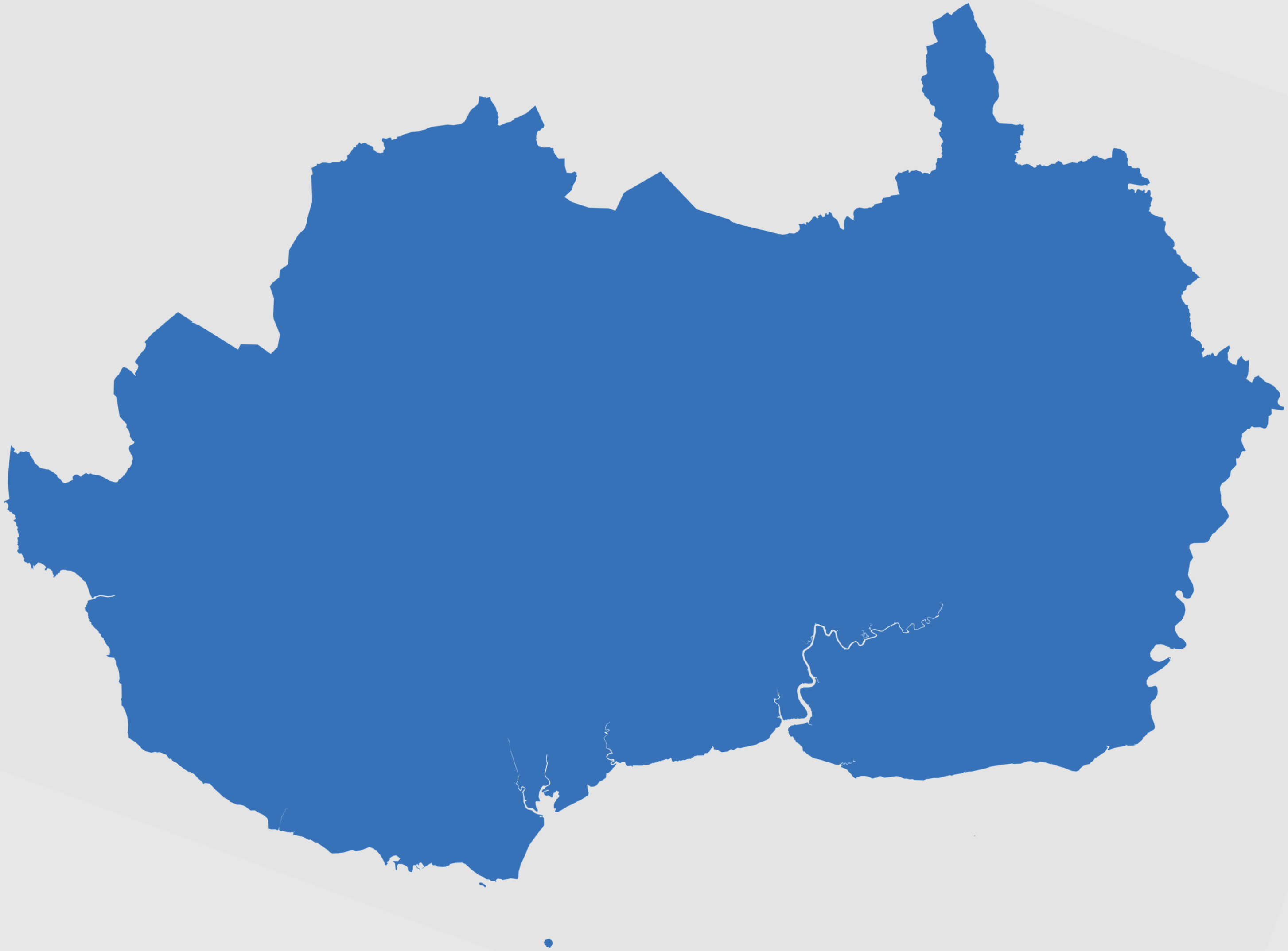
CARDIFF CAPITAL REGION



STATE OF THE CITY REGION

City Region Exchange

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February 2017

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FOREWORD

Prof. Gillian Bristow
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Cardiff University's City Region Exchange is delighted to present this 'State of the City Region' report for the Cardiff Capital Region. This is the first report of its kind and has been produced in an effort to bring together in one place the latest economic, social and environmental data on the city region. We have tried to use accessible and interesting graphics, and to provide some accompanying commentary on key trends and patterns. Our key motivation in producing this report is to demonstrate the sort of data and information that is currently available on the economic health and wellbeing of the Cardiff Capital Region. This data will be important as key decision-makers seek to benchmark and monitor the impact of the City Deal, its associated strategy and range of new initiatives. It is our hope that this report will therefore prompt a wider discussion and debate about the sort of data and information that might need to be regularly collected and analysed to inform ongoing developments in the Cardiff Capital Region, as well as about the appropriate means and mechanisms for doing this. In short, this could provide a template for a regular, perhaps annual, independent health check for key decision-makers and stakeholders in the Cardiff Capital Region.

There is considerable scope for further discussion and debate about the sorts of information that will be useful as the City Deal is implemented and the city region develops. The work we've undertaken for this report suggests that at present, many of the key data sets for the region are somewhat piecemeal. Certainly, there is scope for greater development in terms of indicators which will help us better understand how effectively the city region works as a functional, interdependent economic area, including, for example, how the labour market functions, how businesses are connected across the city region, and the economic role played by the region's different towns and communities. Similarly, there is much greater scope for thinking whether, and how effectively, existing data for the city region maps onto the requirements of the Wellbeing of Future Generations Act.

What this report does reinforce is the very varied economic and social geography of the Cardiff Capital Region, and the scale of both the opportunities and the challenge facing those charged with finding ways to grow and spread economic opportunities in a truly transformative way. We hope that this report will also contribute to the important task of thinking and acting city-regionally that is going to be so crucial to the success and sustainability of the city-region agenda in south east Wales.

As such, we welcome your thoughts and suggestions on this report and how it might be developed and taken forward into the future. Please contact us and join in the debate!

POPULATION AND HOUSING

Figure 1: Percentage change in population (2001-2015)

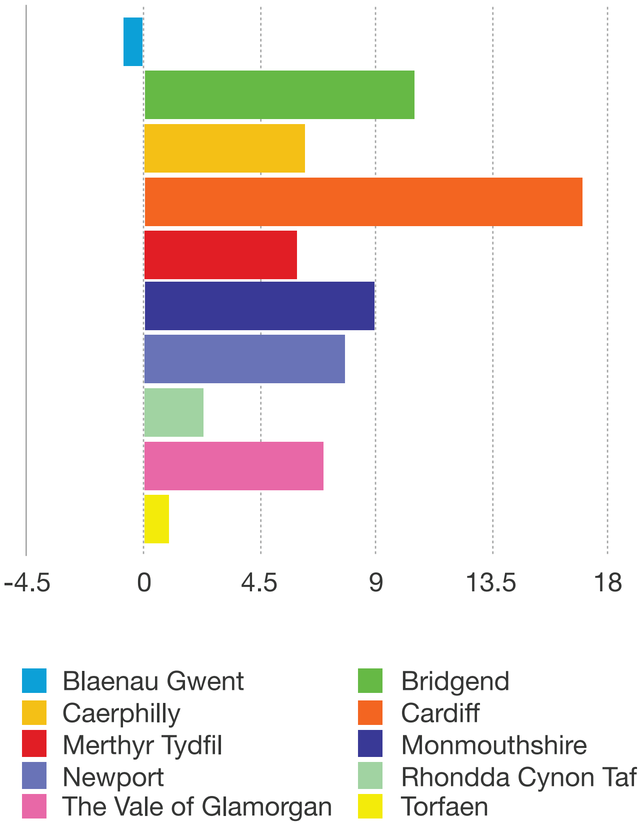
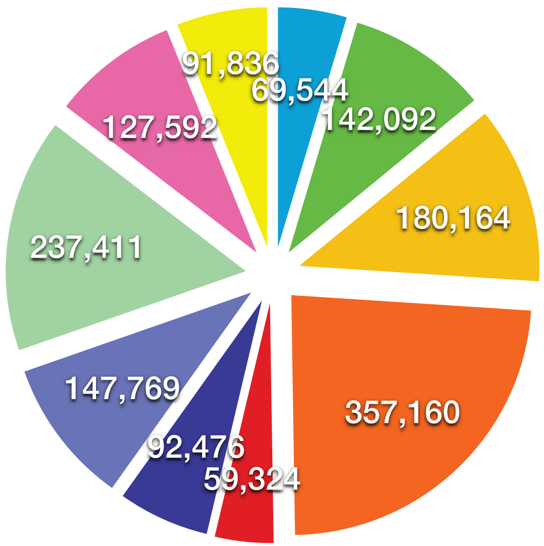


Figure 2: Population (2015)



- Within the Cardiff Capital Region there have been variable levels of population growth since 2001, with Cardiff rising 17.0% and Blaenau Gwent slightly declining by 0.7%.
- While Cardiff remains the largest authority in the Cardiff Capital Region, unlike most other city regions in the UK a number of other authorities make up a large portion of the population, including Rhondda Cynon Taf, Caerphilly, Newport, and Bridgend.
- Distinctive for its countryside the city region has a mix of heavily urbanised and rural areas, with Monmouthshire having a particularly rural population.

Figure 3: Built up area of Cardiff Capital Region

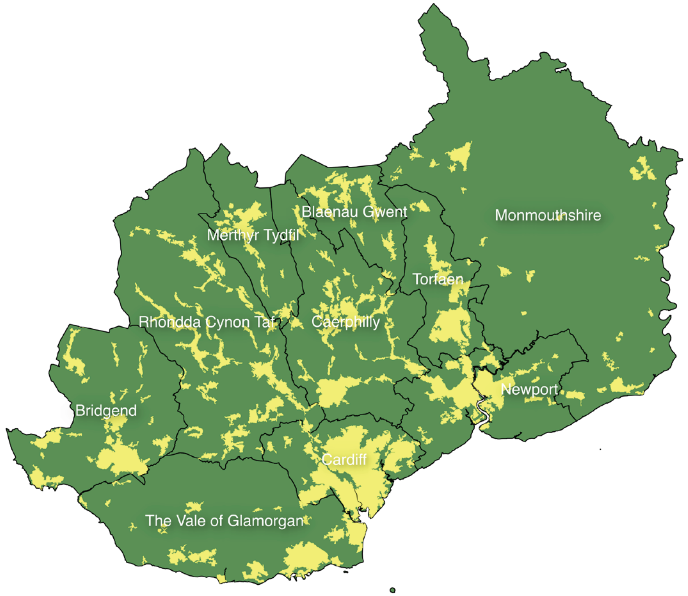


Figure 4: Percentage of population that is rural (2011)

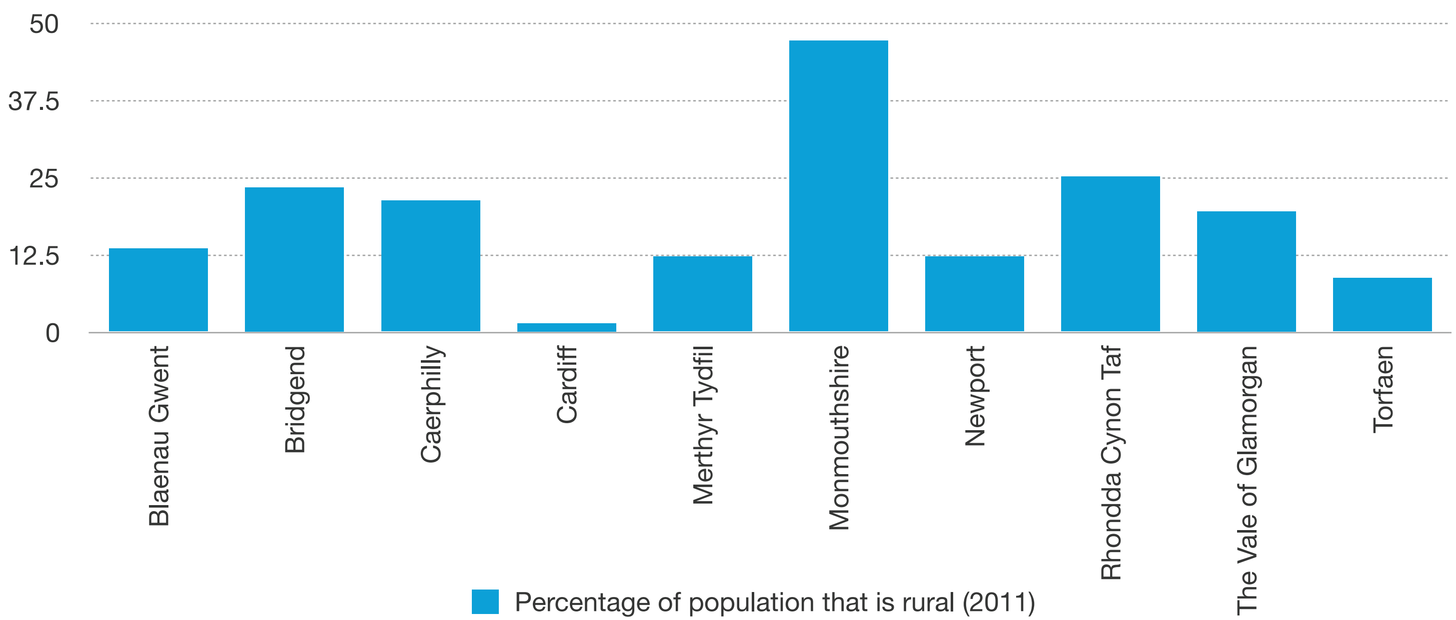


Figure 5: Projected population change (principal projections), mid-2015 to mid-2025

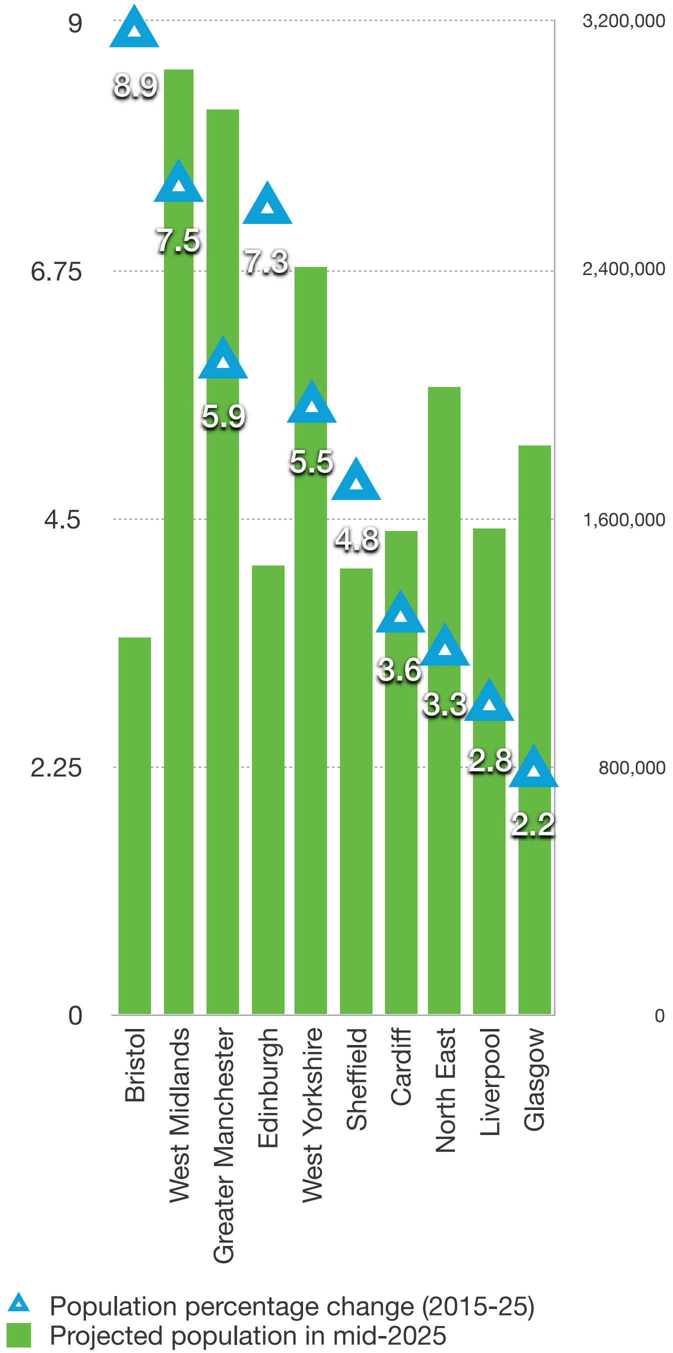


Figure 6: City region age profile

18% of Cardiff Capital Region residents are 65 years old or older

compared to

12% Greater London

16% Greater Manchester

17% Bristol City Region

- A key threat to the productivity of the Cardiff Capital Region is the high percentage of residents who are 65 years or older, one of the highest in the UK.
- Population projections to mid-2025 also highlight the decline in the working age population for the city region, with a stagnating (-0.01%) 16-44 year olds population and decline of 1.8% for 45-64 year olds.
- Population projections for UK city regions suggest the Cardiff Capital Region will see relatively low levels of growth to mid-2025 at 3.6% compared to other city regions such as Bristol (8.9%). The total population of the city region is however projected to rise to 1,558,000, making it comparable to Liverpool city region.

Figure 7: Percentage change in population (principal projections), mid-2015 to mid-2025, by broad age group

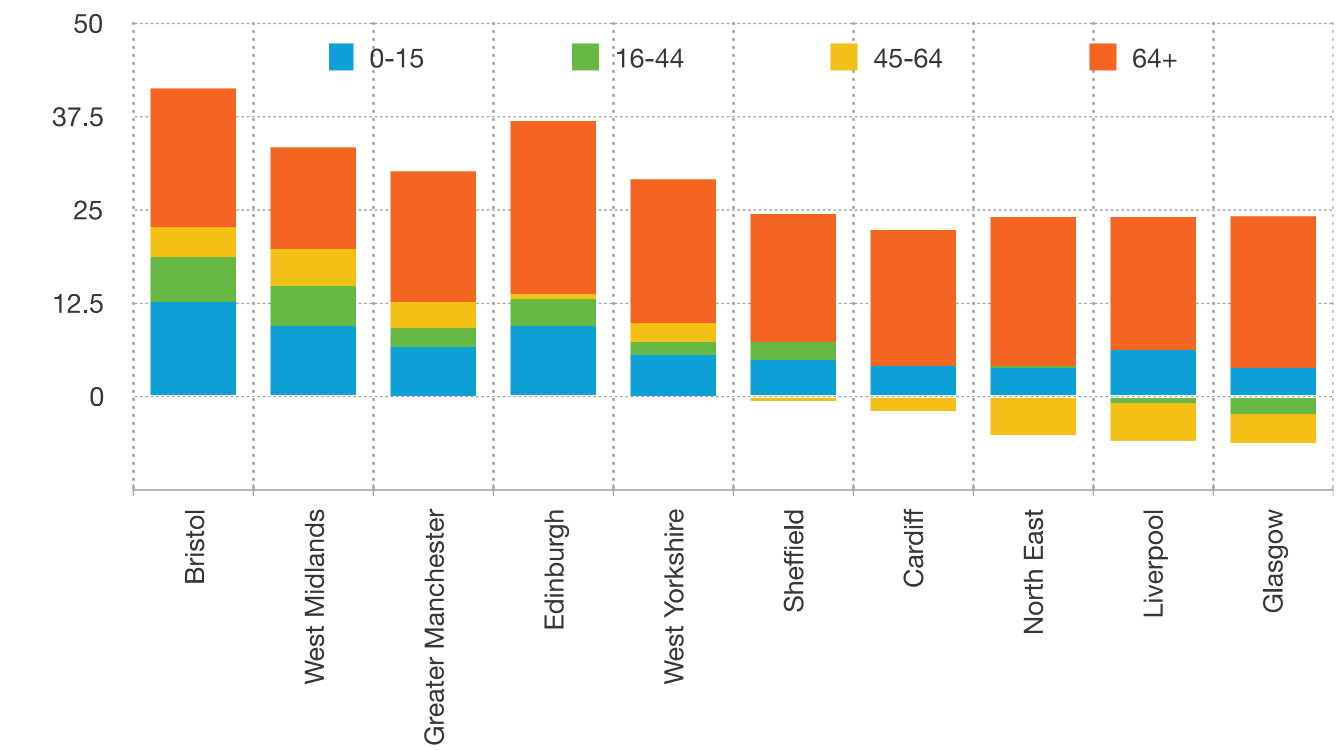


Figure 8: City region migration profile

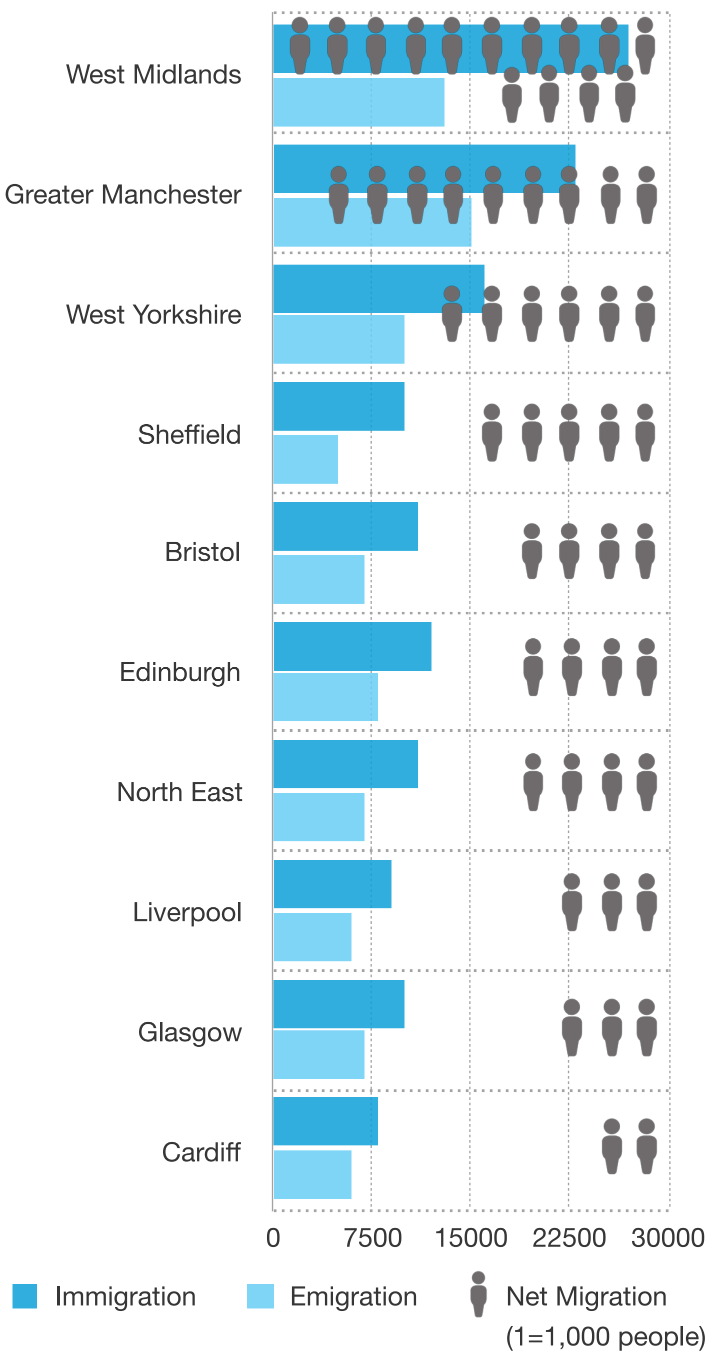


Figure 9: City region population growth

City region	Population mid-2011	Population mid-2015	Growth	% growth
Greater London	8,204,000	8,674,000	469,000	5.7%
Bristol	1,070,000	1,119,000	49,000	4.5%
West Midlands	2,740,000	2,834,000	94,000	3.4%
Greater Manchester	2,685,000	2,756,000	71,000	2.6%
Edinburgh	1,316,000	1,350,000	34,000	2.6%
West Yorkshire	2,227,000	2,282,000	54,000	2.4%
Sheffield	1,344,000	1,375,000	31,000	2.3%
Cardiff	1,482,000	1,505,000	24,000	1.6%
North East	1,933,000	1,957,000	24,000	1.2%
Liverpool	1,506,000	1,525,000	18,000	1.2%
Glasgow	1,787,000	1,804,000	17,000	1.0%
City regions	26,295,000	27,180,000	885,000	3.4%
City regions not London	18,091,000	18,506,000	415,000	2.3%
Rest of the UK	36,990,000	37,930,000	940,000	2.5%
UK	63,285,000	65,110,000	1,825,000	2.9%

*Note: Numbers may not add up due to rounding

- The Cardiff Capital Region exhibits low levels of migration compared to other city regions in the UK.
- Over the past four years the city region's population has grown by 24,000 people. However at 1.6% this is much lower than many other city regions, with only the North-East, Liverpool, and Glasgow being comparatively lower.
- While the region has a high level of young people, this can be partly attributed to the number of universities in the city region.

Figure 10: Cardiff Capital Region population pyramid by age (2015)

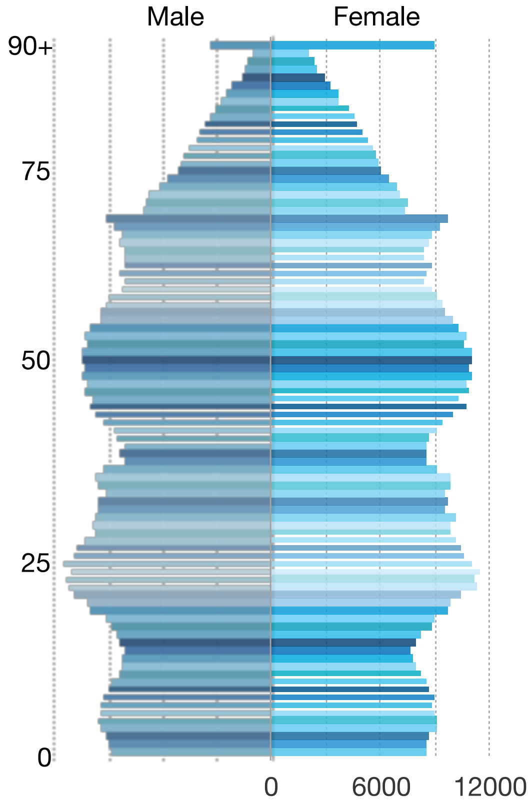


Figure 11: Difference between workday and resident population (2011)

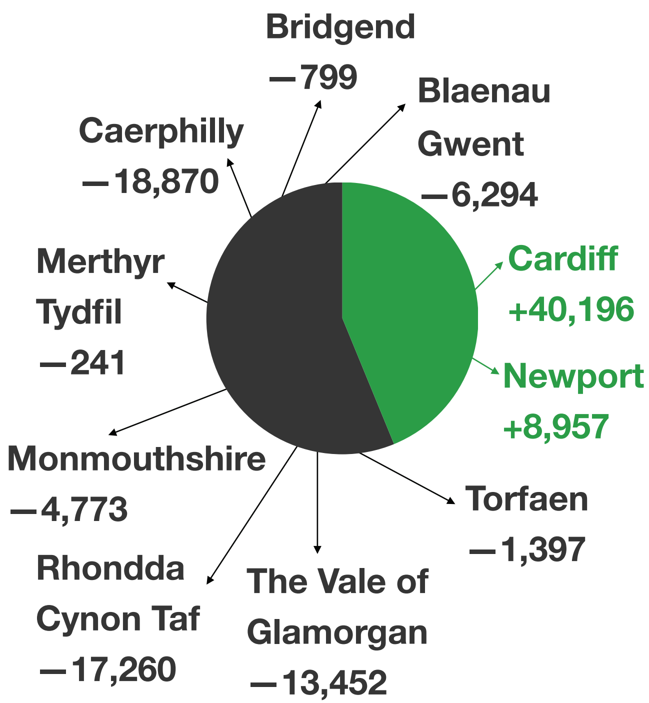
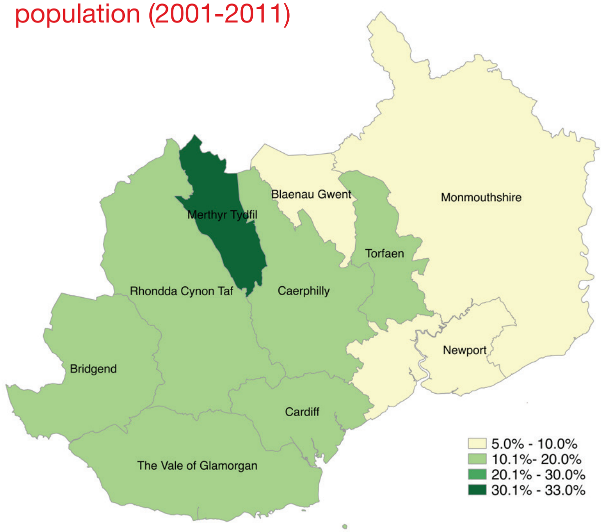


Figure 12: Percentage change in workplace population (2001-2011)



- Compared to resident population, workday population helps to indicate where major employment areas are located. The only two areas of the Cardiff Capital Region that saw a net increase in population during the day due to workers were Cardiff and Newport in the 2011 census.
- Merthyr Tydfil, however, saw strong growth in its workday population between 2001-2011, rising 33% compared to Blaenau Gwent, Monmouthshire and Newport which saw more modest increases of 5.0%, 9.6% and 5.2% respectively.
- Population projections for the unitary authorities in the city region show high levels of growth for Cardiff to the year 2036 and slight declines in population for Merthyr Tydfil and Blaenau Gwent.

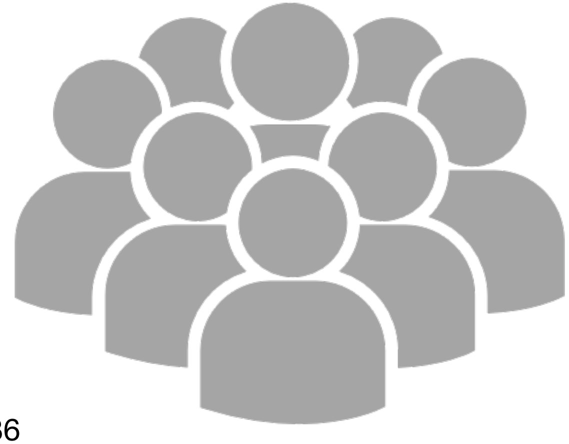


Figure 13: 2014-based unitary authority population projections (2016, 2026, 2036)

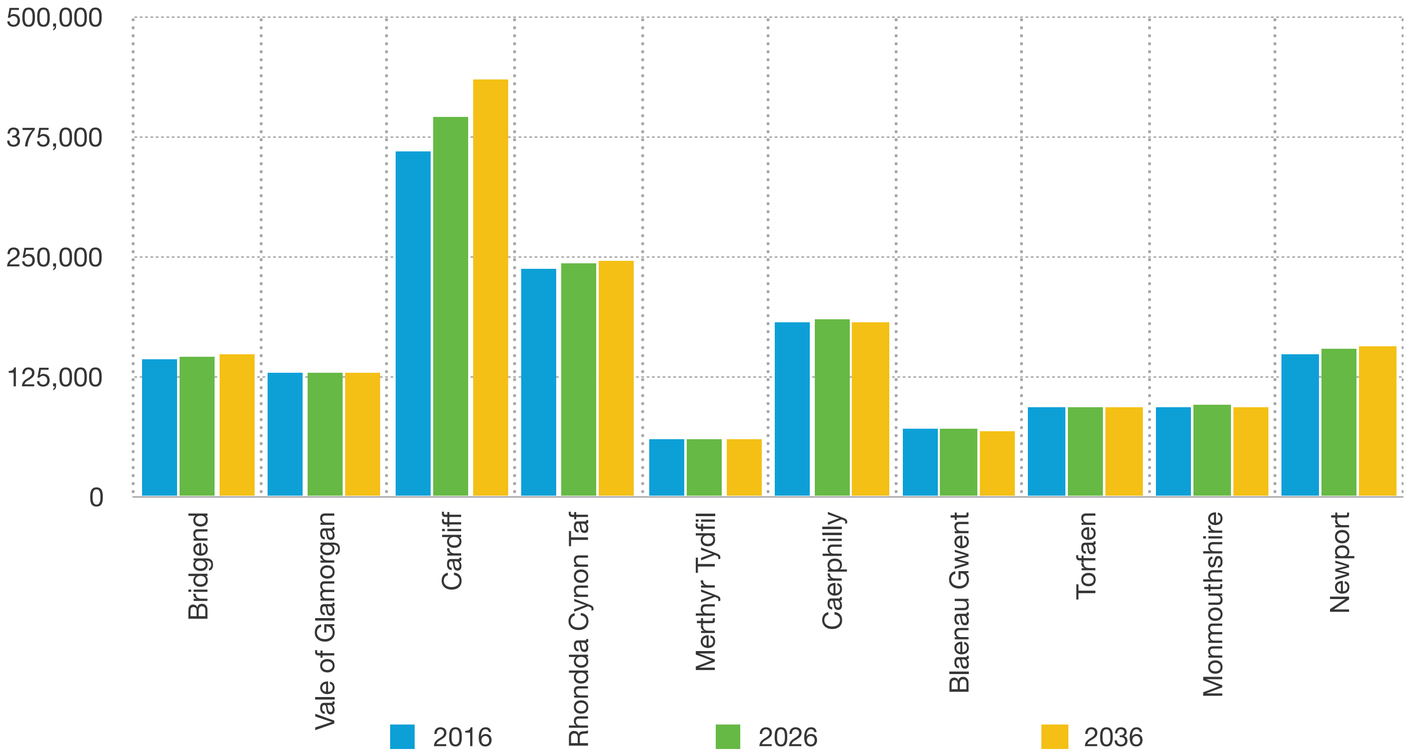


Figure 14: Average population density (persons/ hectares)

Unitary Authority	2001	2011	Change
Blaenau Gwent	6.44	6.40	-0.04
Bridgend	5.13	5.60	0.47
Caerphilly	6.11	6.40	0.29
Cardiff	21.76	24.70	2.94
Merthyr Tydfil	5.06	5.30	0.24
Monmouthshire	1.00	1.10	0.10
Newport	7.19	7.60	0.41
Rhondda Cynon Taff	5.47	5.50	0.03
The Vale of Glamorgan	3.60	3.80	0.20
Torfaen	7.24	7.20	-0.04

- Increases in density between 2001 and 2011 have been rather modest apart from a strong increase in Cardiff to 24.7 persons/hectare.
- There is considerable variation in homelessness throughout the city region. Some authorities such as Newport, Blaenau Gwent, and Monmouthshire have seen sharp increases between 2001/02 and 2014/15.
- House prices are relatively lower in some parts of the city region than others. However the price for a home has sharply risen between 2001 and 2016 within the city region, ranging from 100% to 200%, apart from flats which have seen more variable increases depending on the area.

Figure 16: Median house price paid (All house types, first quarter, 2016)

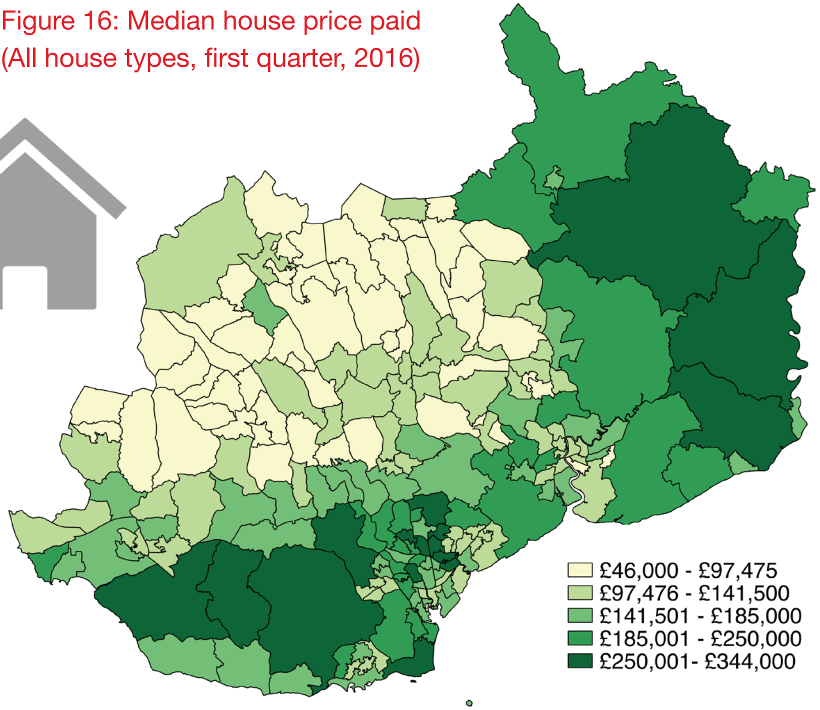
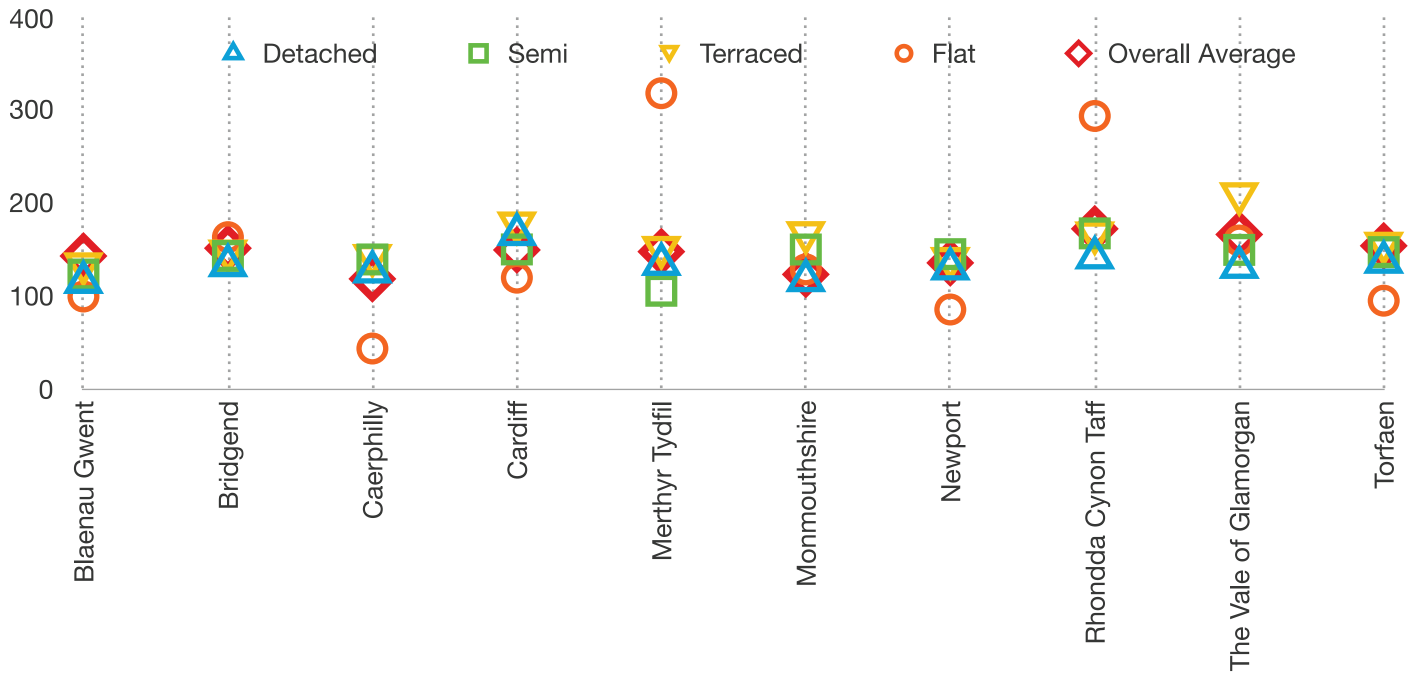


Figure 15: Households accepted as eligible, unintentionally homeless and in priority need

Unitary Authority	2001/02	2014/15	Change
Blaenau Gwent	75	145	93.3%
Bridgend	595	215	-63.9%
Caerphilly	335	260	-22.4%
Cardiff	655	820	25.2%
Merthyr Tydfil	110	35	-68.2%
Monmouthshire	60	110	83.3%
Newport	70	320	357.1%
Rhondda Cynon Taf	480	195	-59.4%
The Vale of Glamorgan	160	235	46.9%
Torfaen	280	120	-57.1%

Figure 17: Percentage change in average house price paid by type of house (Q1 2001- Q1 2016)



ECONOMIC PROSPERITY

Figure 18: Change in GVA per Hour Index - Smoothed (UK=100) (numbers may not add due to rounding)

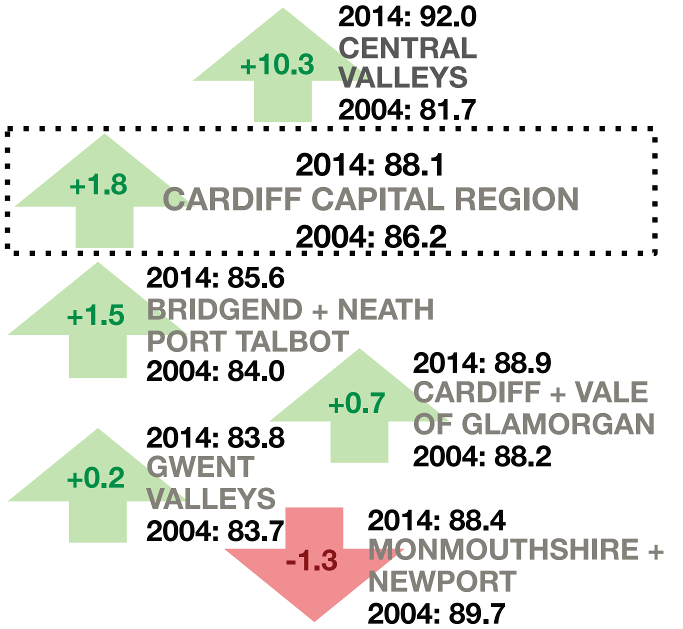
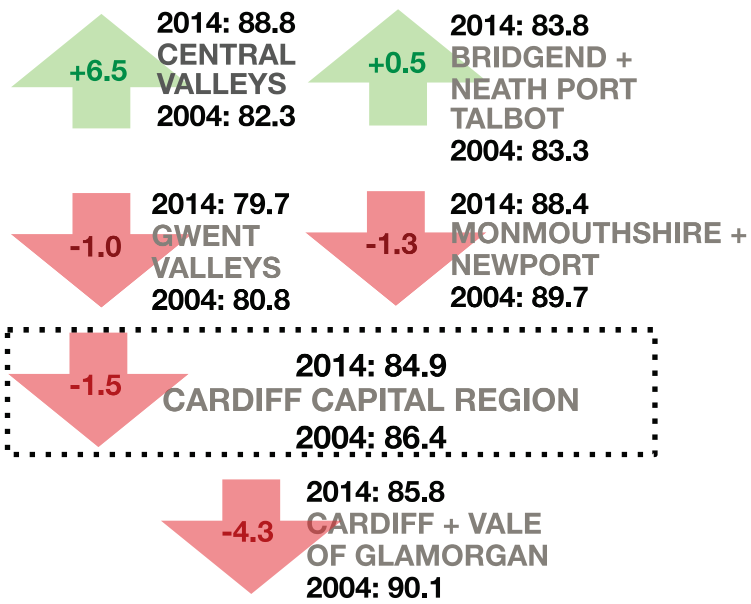
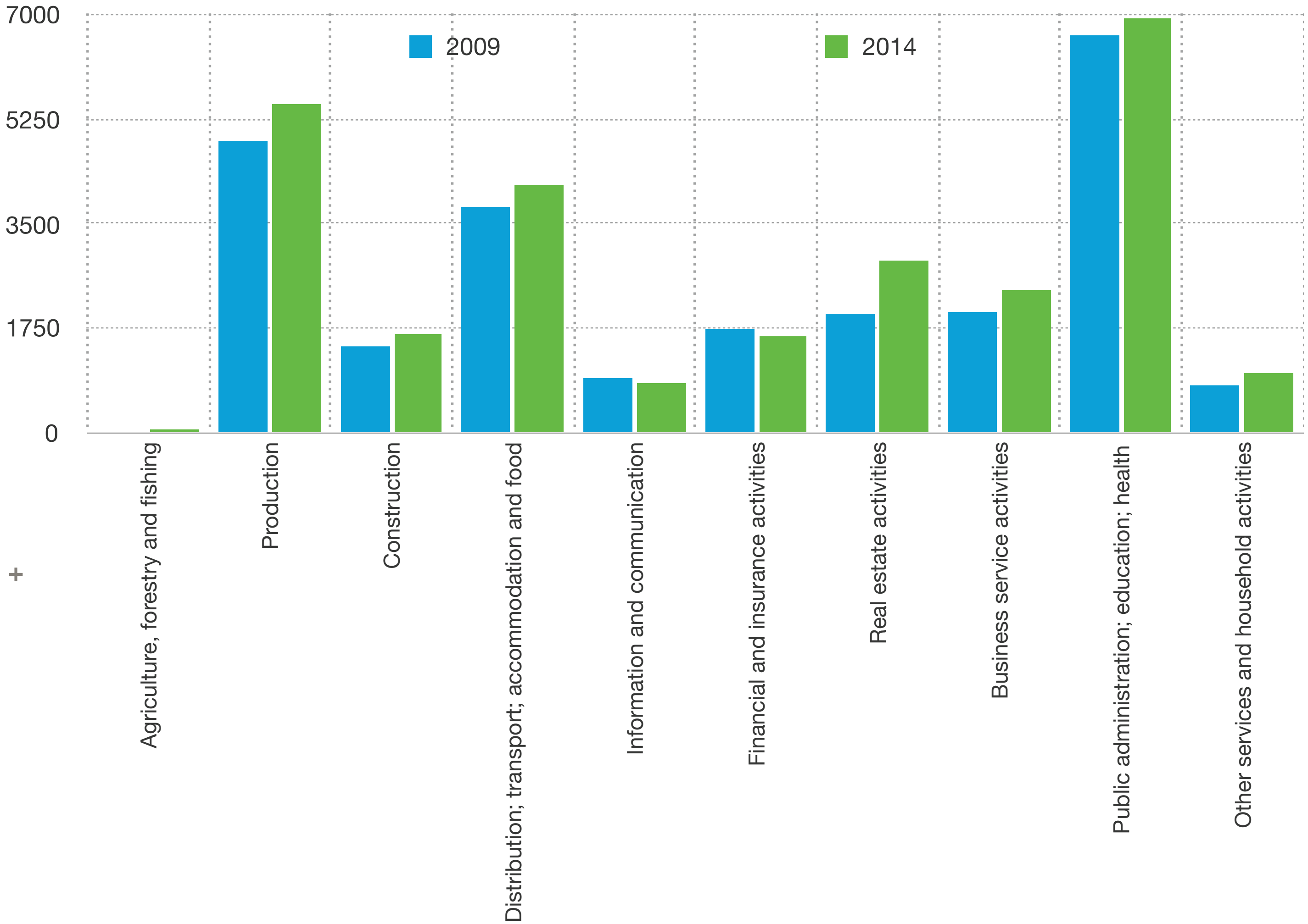


Figure 19: GVA per Job Filled - Smoothed (UK=100) (numbers may not add due to rounding)



- The gross value added (GVA) per hour index shows a slight rise for the Cardiff Capital Region as a whole between 2004 and 2014. The Central Valleys area witnessed the strongest increase (81.7 to 92.0) while the greatest decline was in Monmouthshire and Newport (89.7 to 88.4).
- In terms of GVA per job filled there has been an overall decline in the index for the city region of 1.5 between 2004 and 2014. Within the Cardiff Capital Region, Cardiff and the Vale of Glamorgan saw the greatest decline (90.1 to 85.8).
- Productivity - measured by GVA by industry - has improved across most sectors between 2009 and 2014. Productivity has fallen in the information and communication, and financial and insurance activities.

Figure 20: Gross Value Added (Income Approach) by SIC07 industry at current basic prices for Cardiff Capital Region (2009-2014)



- Between 2004 and 2015 the unemployment rate throughout the city region has generally increased, particularly in Bridgend (+3.4) and Blaenau Gwent (+2.3). A decline was however seen in The Vale of Glamorgan (-1.0).
- The unemployment rate across the authorities of the city region was highly variable in 2015, from a low of 3.3% in Monmouthshire to a high of 9.5% in Blaenau Gwent.
- Those claiming job seekers allowance and universal credit were largely concentrated in the more urban parts of the Cardiff Capital Region authorities.

Figure 22: Unemployment rate (Jan 2015)

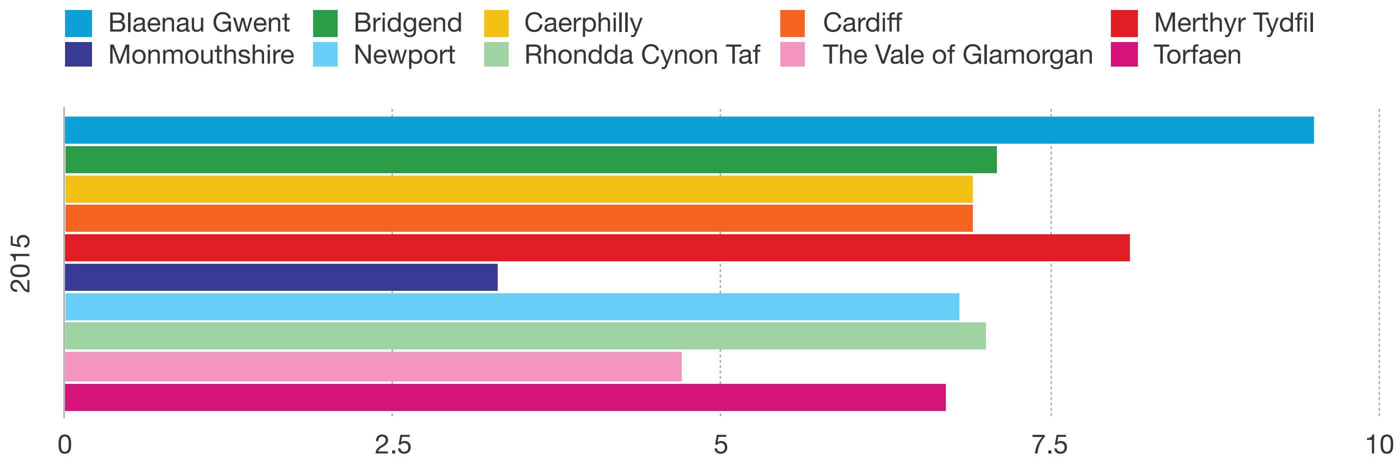


Figure 21: Percentage point change in unemployment rate (Jan 2004-Dec 2004 to Jan 2015-Jan 2015)

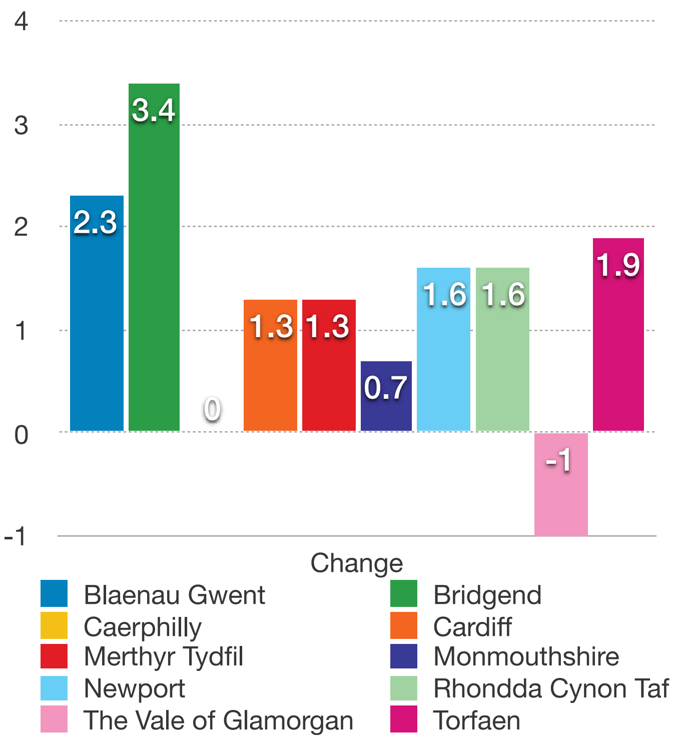
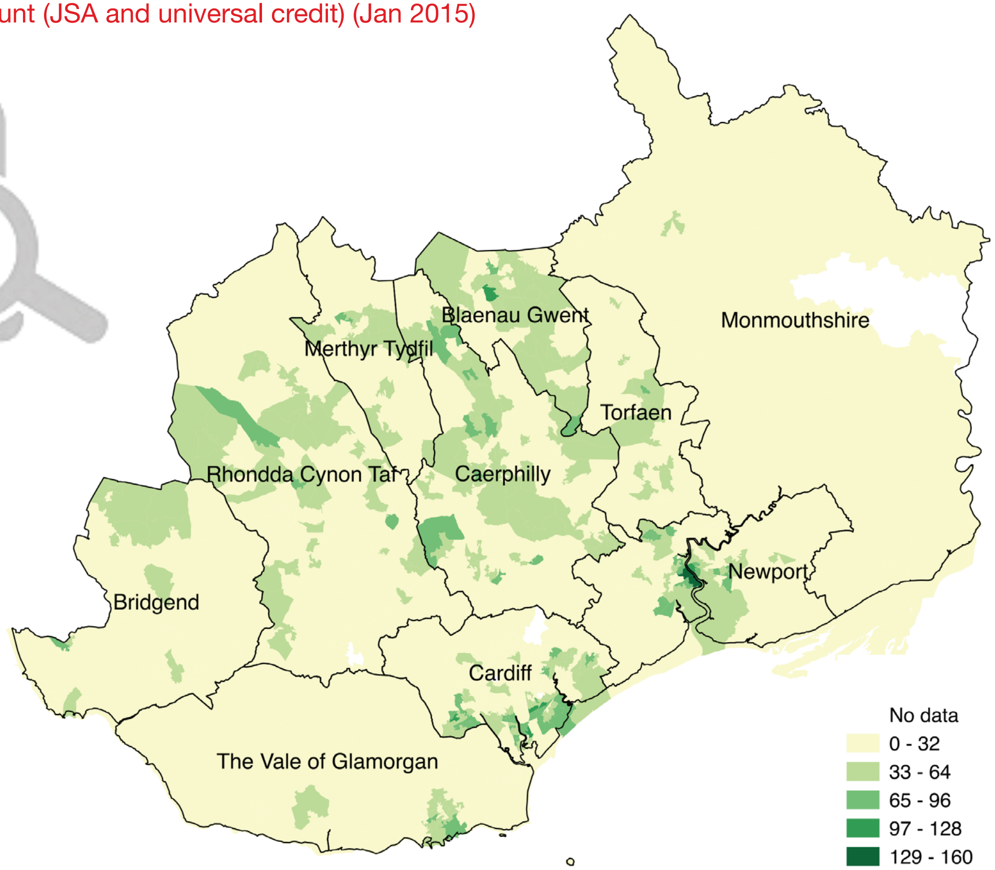


Figure 23: Claimant count (JSA and universal credit) (Jan 2015)



- The nature of employment has markedly changed within the Cardiff Capital Region between 2004 and 2015, with sharp declines seen in manufacturing and, more modest, increases in the banking, finance, and insurance sector.
- Based on defined occupation there have also been strong increases in the associate, professional, and technical fields in Blaenau Gwent, Newport, and Rhondda Cynon Taf. Apart from in Merthyr Tydfil there have generally been declines in the process, plant and machine operatives fields.
- Public administration, education, and health dominate as the key industry in all authorities, comprising around 30% of the total.

Figure 24: Percentage point change in all persons employed in two industries (Jan 2004-Dec 2004 to Jan 2015-Jan 2015)

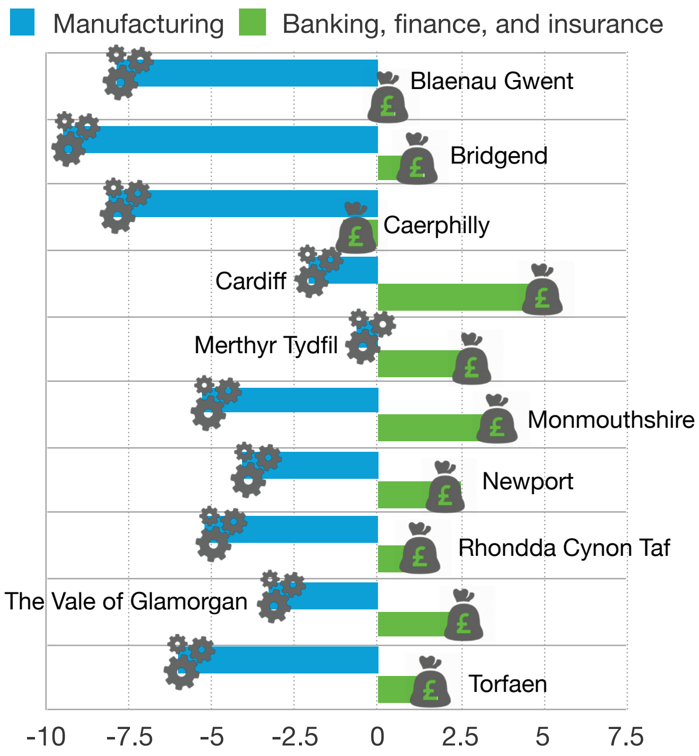


Figure 25: Change in percentage of total persons employed by occupation (Jan 2004-Dec 2004 to Jan 2015-Dec 2015)

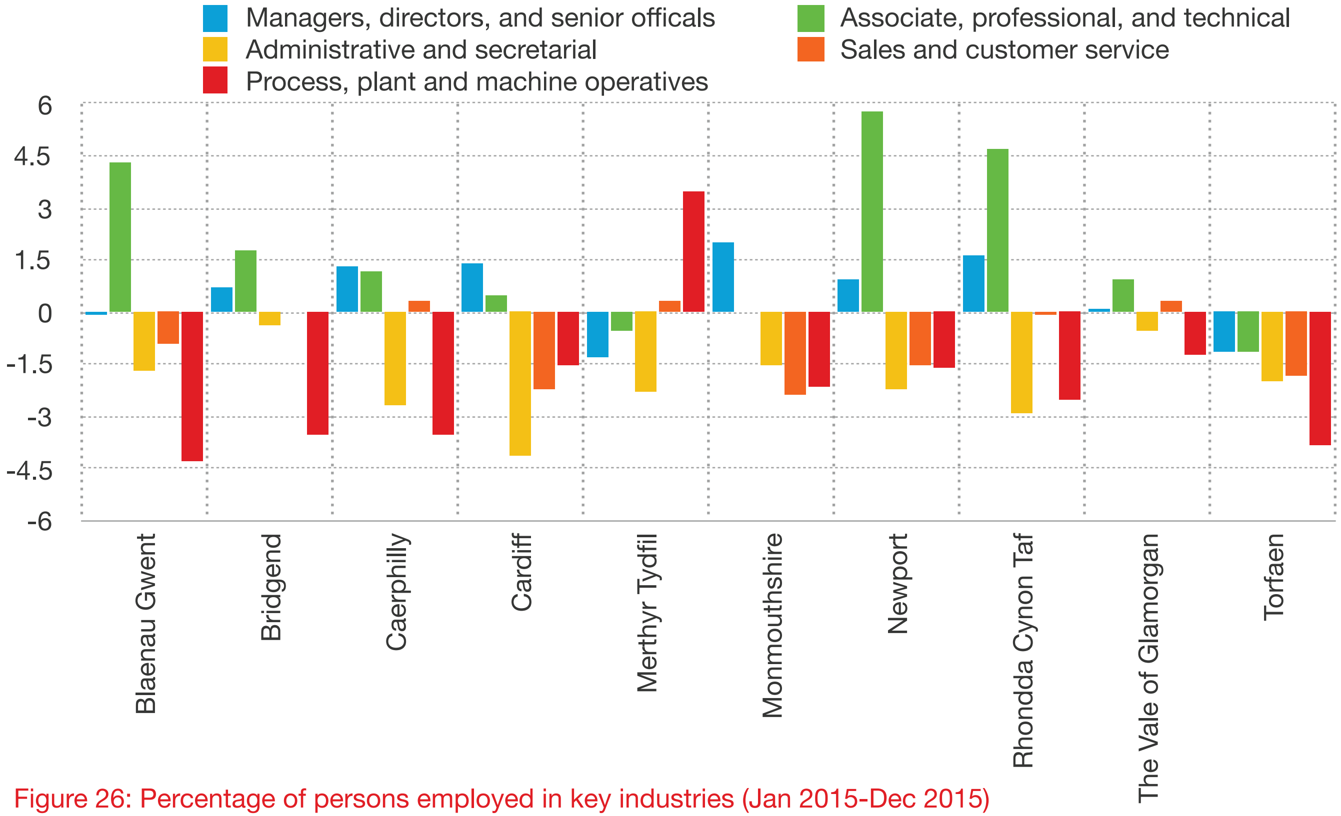
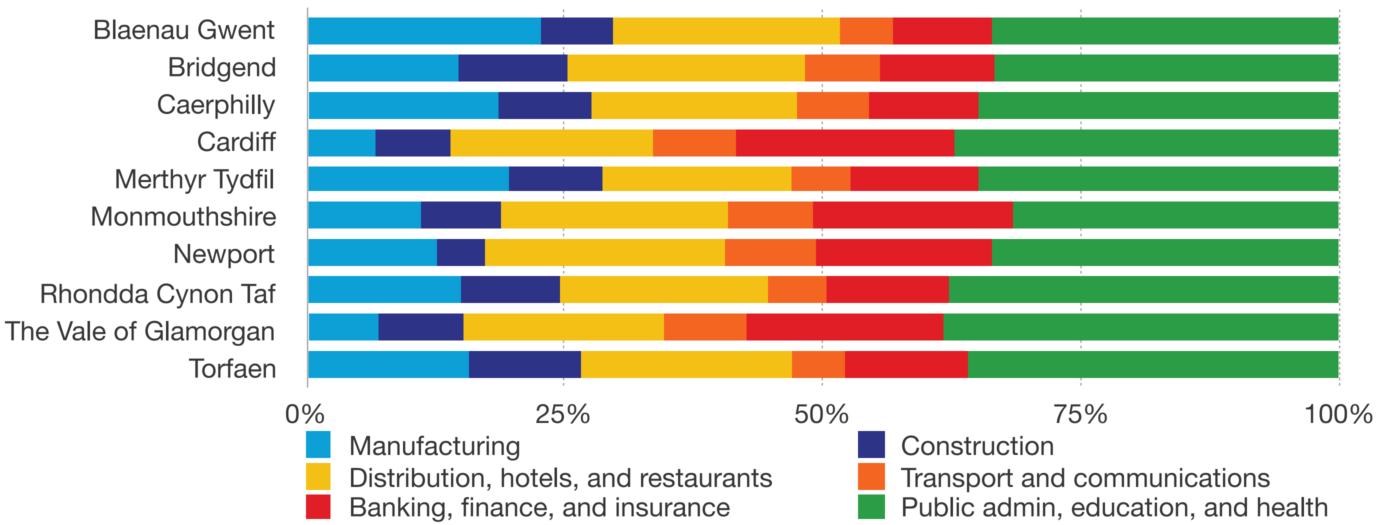


Figure 26: Percentage of persons employed in key industries (Jan 2015-Dec 2015)



- The economic activity rate in all authorities in the city region apart from Cardiff has improved between 2004 and 2015.
- Those unemployed with health conditions or illnesses varied from a low of 3.3% in Monmouthshire to a high of 7.9% in Blaenau Gwent.
- Between 2000 and 2014, the change in the number of jobs in each unitary authority saw the greatest increase of 26.3% in Merthyr Tydfil (+5,000 jobs) and largest decline in Blaenau Gwent of 8.7% (-2,000 jobs).
- Cardiff saw the greatest increase in the absolute number of jobs during the period at 29,000.

Figure 27: Economic activity rate - aged 16-64 (Jan 2004-Dec 2004 to Jan 2015-Dec 2015)

Unitary Authority	Rate (2004)	Rate (2015)	% pt chg (2004-2015)
Blaenau Gwent	67.3	71.7	4.4
Bridgend	74.4	77.4	3.0
Caerphilly	67.4	72.7	5.3
Cardiff	74.7	72.9	-1.8
Merthyr Tydfil	64.4	71.7	7.3
Monmouthshire	76.5	80.7	4.2
Newport	71.5	73.9	2.4
Rhondda Cynon Taf	70.6	74.9	4.3
The Vale of Glamorgan	76.1	77.1	1.0
Torfaen	72.2	76.3	4.1

Figure 28: Percentage change in total number of jobs (2000-2014)

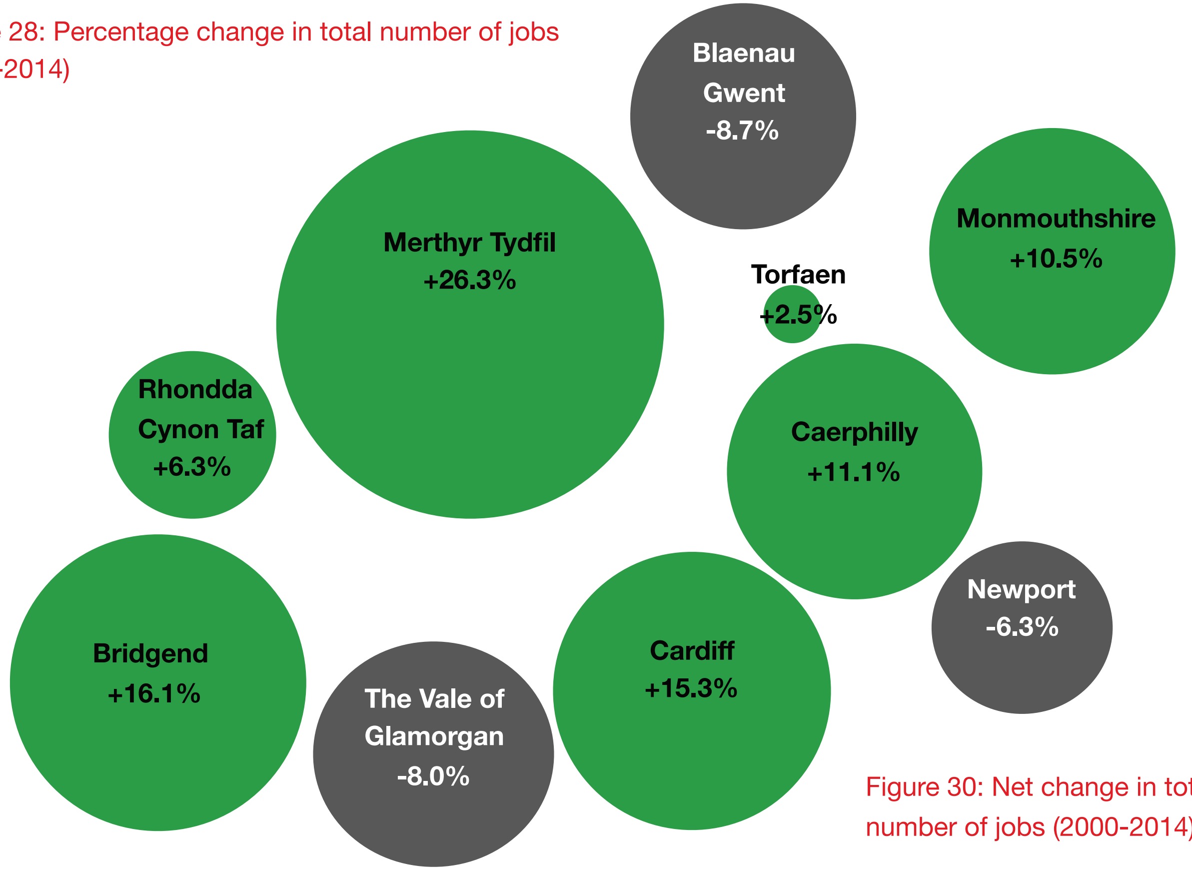


Figure 29: Percentage unemployed with health conditions or illnesses lasting more than 12 months (Jan 2015-Dec 2015)

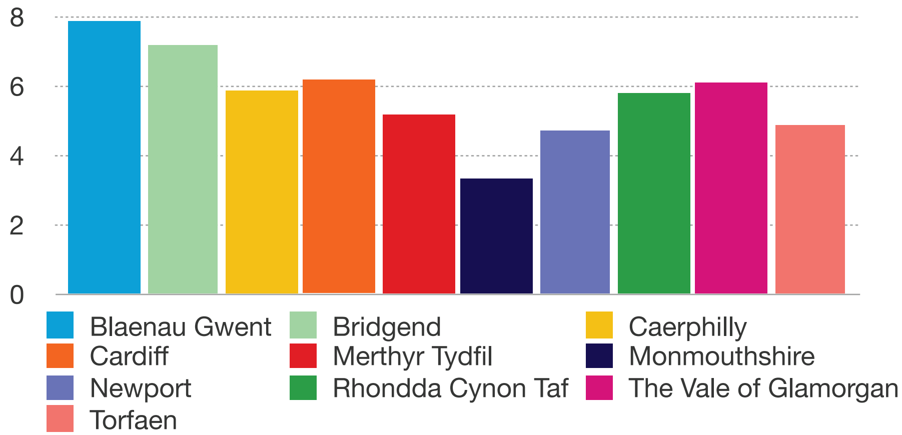
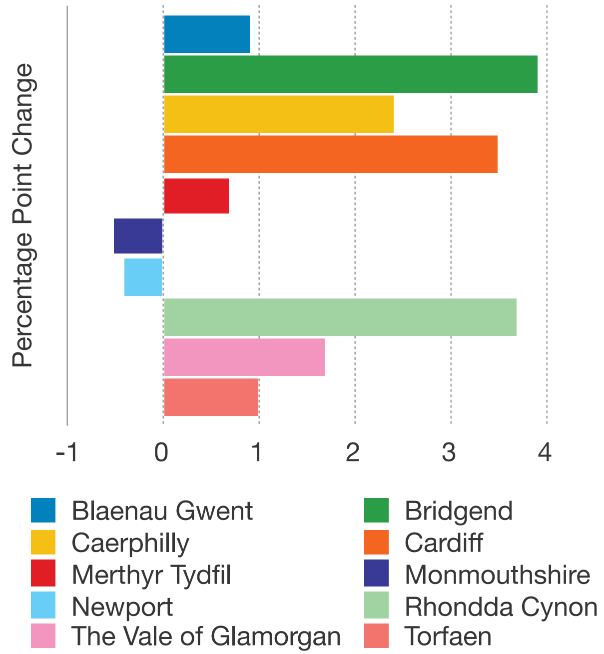


Figure 30: Net change in total number of jobs (2000-2014)

Unitary Authority	Change
Blaenau Gwent	-2,000
Bridgend	9,000
Caerphilly	6,000
Cardiff	29,000
Merthyr Tydfil	5,000
Monmouthshire	4,000
Newport	-5,000
Rhondda Cynon Taf	5,000
The Vale of Glamorgan	-4,000
Torfaen	1,000

Figure 31: Percentage point change in all persons employed in the private sector (Jan 2004-Dec 2004 to Jan 2015-Jan 2015)



- Private sector employment has increased between 2004 and 2015 in the majority of authorities within the city region, growing the most in Bridgend (+3.9%) and Rhondda Cynon Taf (+3.7%).
- There has been a net rise in public sector jobs over the same period of 0.5% and 0.4% in Monmouthshire and Newport.
- The likelihood of company failure, as measured by QuiScore, highlights geographic variation in company health across the city region.
- New enterprises increased between 2009 and 2015 in all local authorities while most saw declines in the number of enterprises that failed, apart from Merthyr Tydfil and Blaenau Gwent.
- The value of outstanding small-medium enterprise loans was largely concentrated within the coastal local authorities of the city region.

Figure 32: Average QuiScore for companies with headquarters in the Cardiff Capital Region by postcode (2015)

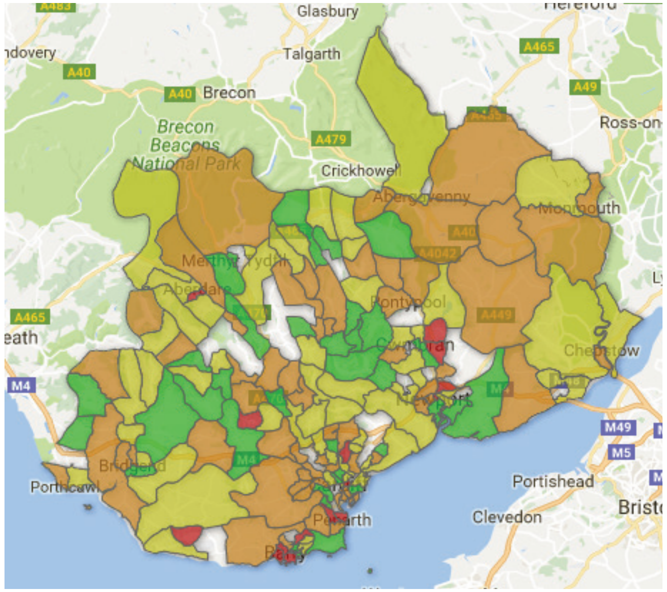


Figure 34: Value of SME lending outstanding at end-June 2013, by postcode

£ Over £1.5 trillion in outstanding SME loans in the Cardiff Capital Region

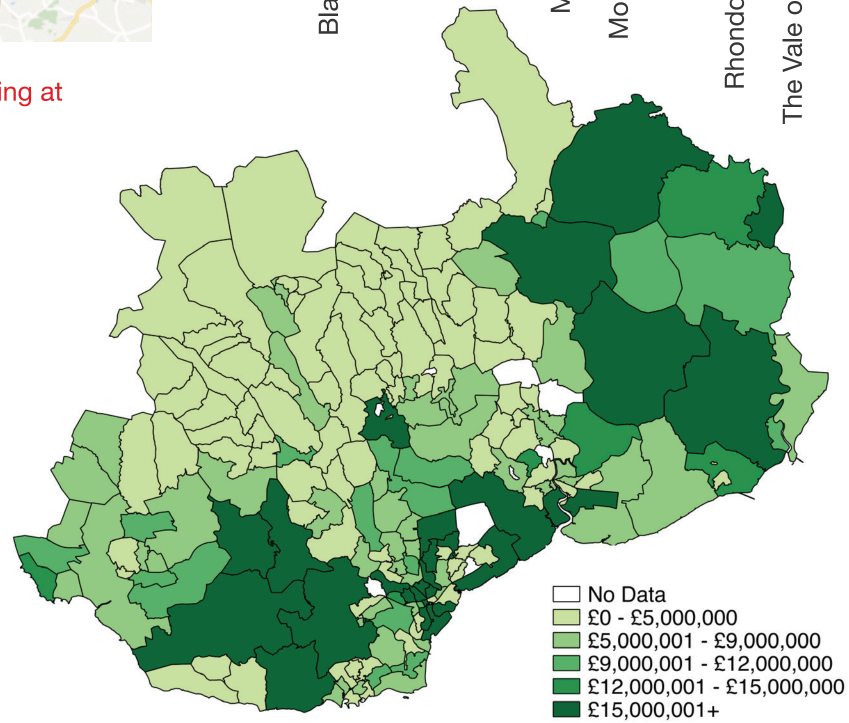
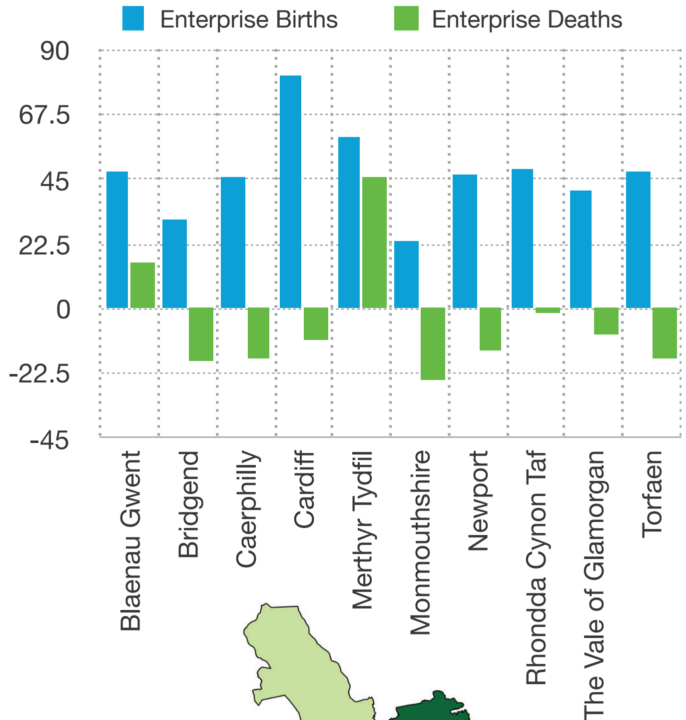
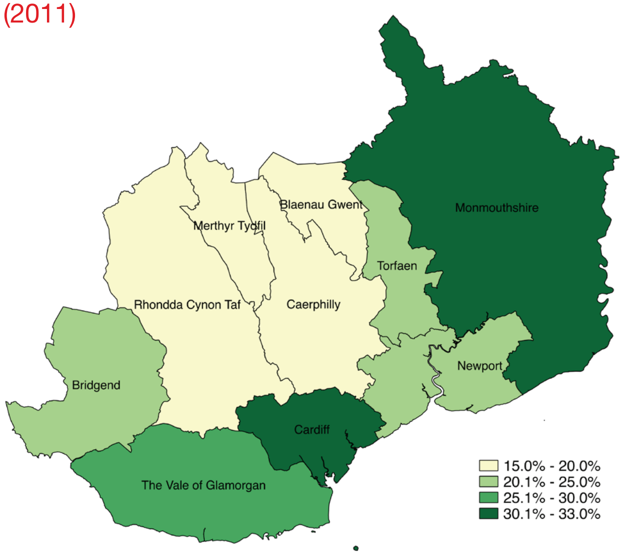


Figure 33: Percentage change in count of births and deaths of enterprises (2009-2015)



SKILLS AND INNOVATION

Figure 35: Percentage of usual residents aged 16 and over with Level 4 qualifications and above (2011)



- Percentage of the population with qualifications at level 4 ranges considerably in the Cardiff Capital Region, with highs of over 30% in Cardiff and Monmouthshire and lows of less than 20% in Rhondda Cynon Taf, Caerphilly, Merthyr Tydfil, and Blaenau Gwent.
- Over 25% of the population has either a Level 2 or Level 3 qualification in the city region.
- There have been declines in the number of people with no qualifications, with Merthyr Tydfil seeing the largest percentage point decline of 12.4% between 2004 and 2015.
- Blaenau Gwent still has high levels of persons with no qualifications at 19.0% compared to Monmouthshire (6.2%).

Figure 36: Percentage of usual residents aged 16 and over with Level 2 or 3 qualifications (2011)

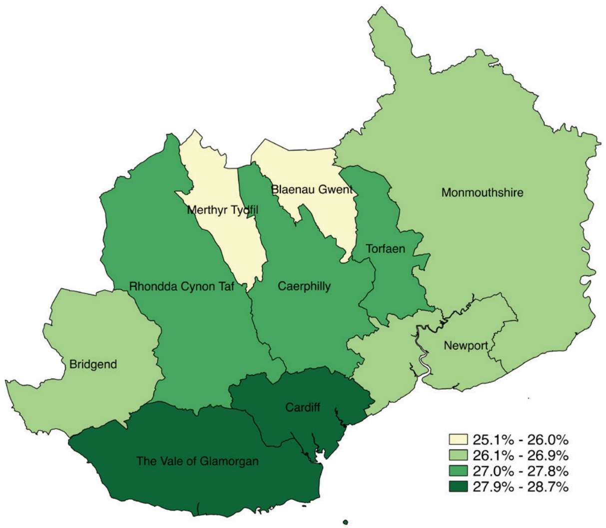


Figure 37: Percentage point change persons with no qualifications (NVQ) - aged 16-64 (Jan 2004-Dec 2004 to Jan 2014-Dec 2015

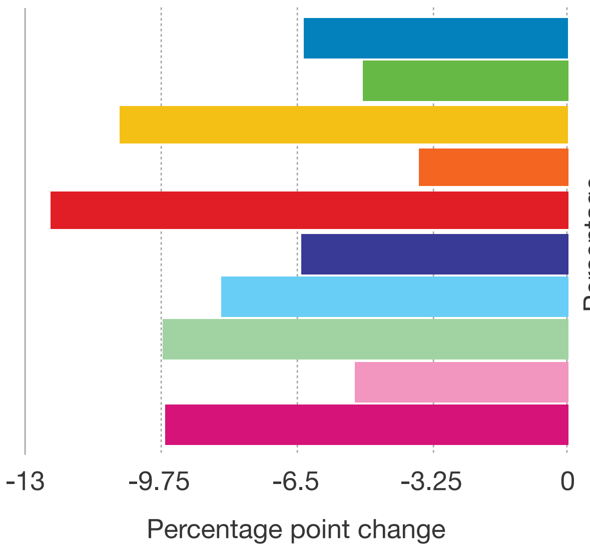


Figure 38: Percentage of persons with no qualifications (NVQ) - aged 16-64 (Jan 2014-Dec 2015)

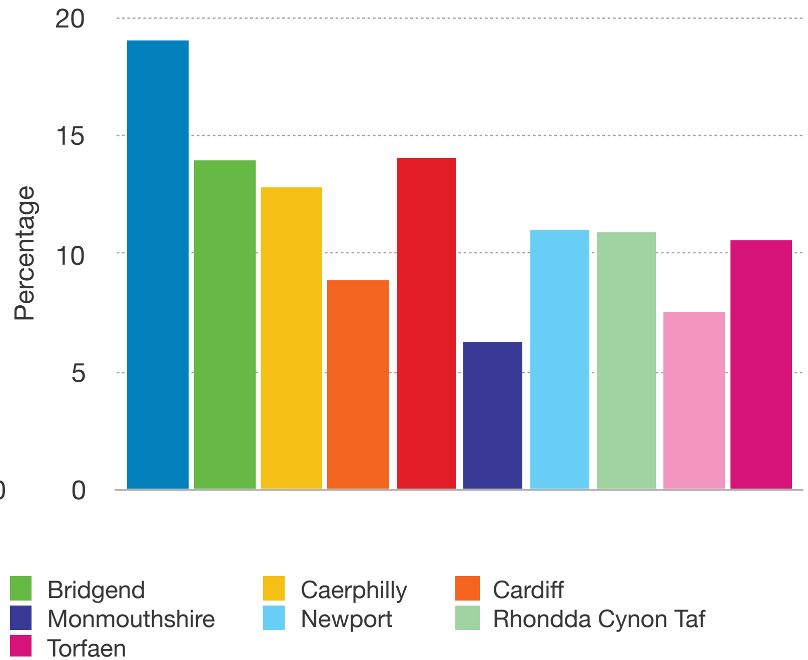


Figure 39: Percentage of enterprises in Cardiff Capital Region engaged in innovation activity (2015)

	CCR Total
Innovation active	51.8%
Technological innovation	
Product innovator	18.6%
Process innovator	10.9%
Non-Technological innovation	
New business practices for organising procedures	22.6%
New methods of organising work responsibilities	15.4%
New methods of organising external relationships	6.4%
Changes to marketing concepts and strategies	17.5%

Figure 40: Percentage of enterprises engaging in each innovation activity (2015)

	CCR Total
Internal R&D	18.3%
Acquisition of external R&D	4.2%
Advanced machinery and equipment	9.9%
Computer hardware	23.7%
Computer software	25.6%
Acquisition of existing knowledge	3.5%
Training for innovative activities	12.2%
All forms of design	14.9%
Changes to product or service design	7.0%
Market research	8.2%
Changes to marketing methods	7.0%
Launch advertising	4.5%

- Over half of enterprises in the Cardiff Capital Region are considered to be innovation active. However only 18.6% are technological product innovators compared to 22.6% who are non-technological innovators in the area of new business practices for organising procedures.
- The largest share of innovation activity is in computer software (25.6%) and computer hardware (23.7%).
- While London dominates in the UK, younger commuters employed full-time in manager, director and senior official, professional and associate professional and technical occupations are also drawn to the Cardiff Capital Region.

Figure 41: UK younger professional, scientific and technical and finance commuters (2011) based on www.commute-flow.net classification

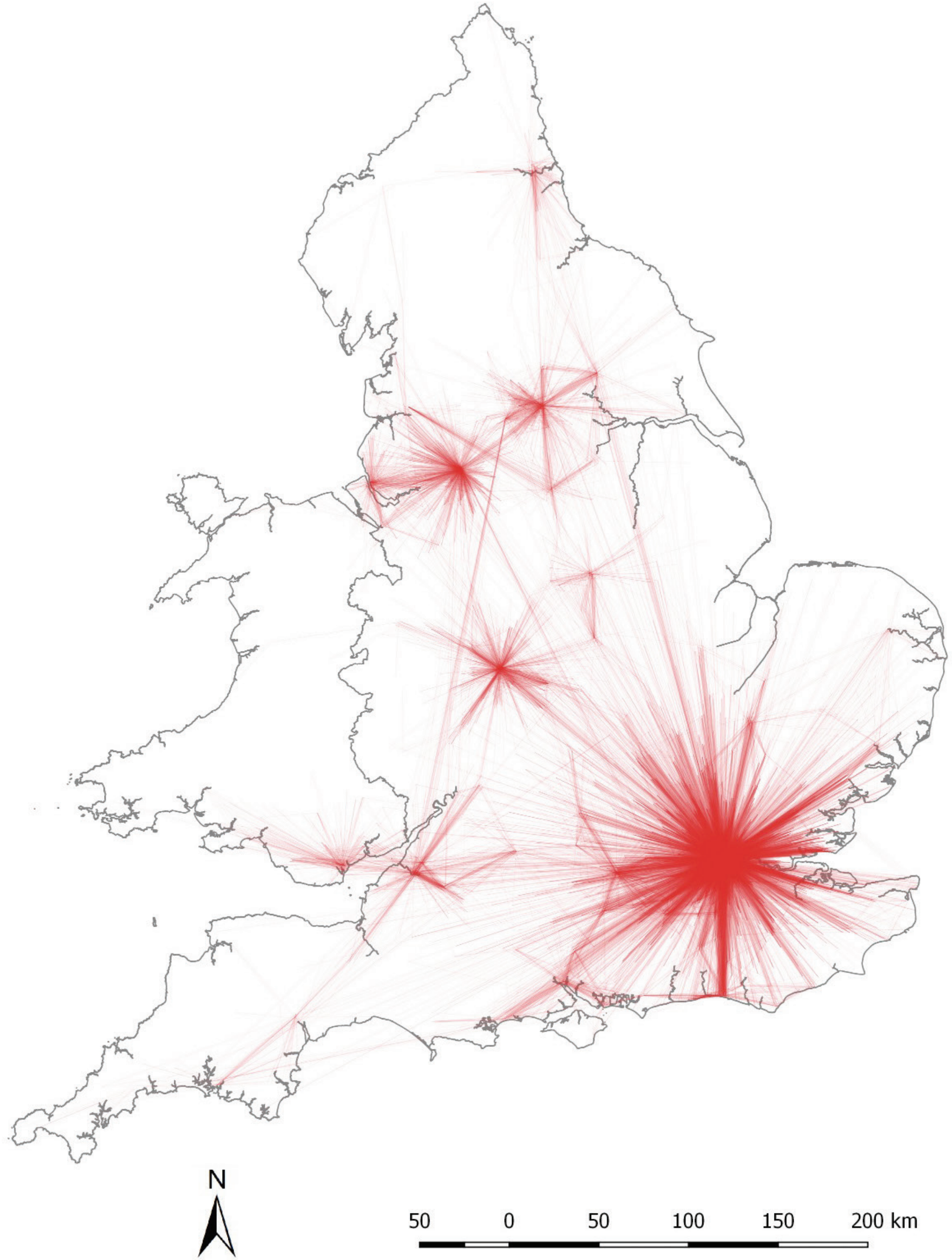


Figure 42: UK fixed broadband performance (Nov 2015)

28.9 Mbit/s Average UK broadband speed

- While the average UK broadband speed is 28.9 Mbit/s, most authorities in the city region only reach about half that average speed.
- Only Cardiff exceeds the UK average with 30.2 Mbit/s within the city region, with Newport just below it at 27.8 Mbit/s.
- Merthyr Tydfil's average broadband speed is particularly low at 8.3 Mbit/s. This is likely due to a very low level of super fast broadband availability in Merthyr Tydfil at 18.0% compared to Cardiff, Newport, and Blaenau Gwent which have over 80% availability.

Figure 43: Average broadband download speed (Mbit/s) (June - July 2014)

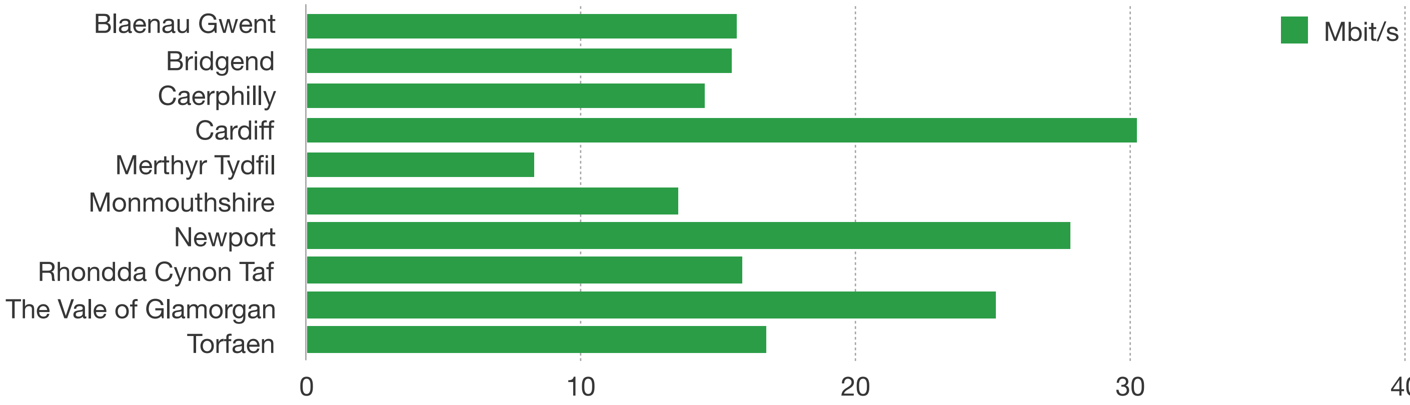
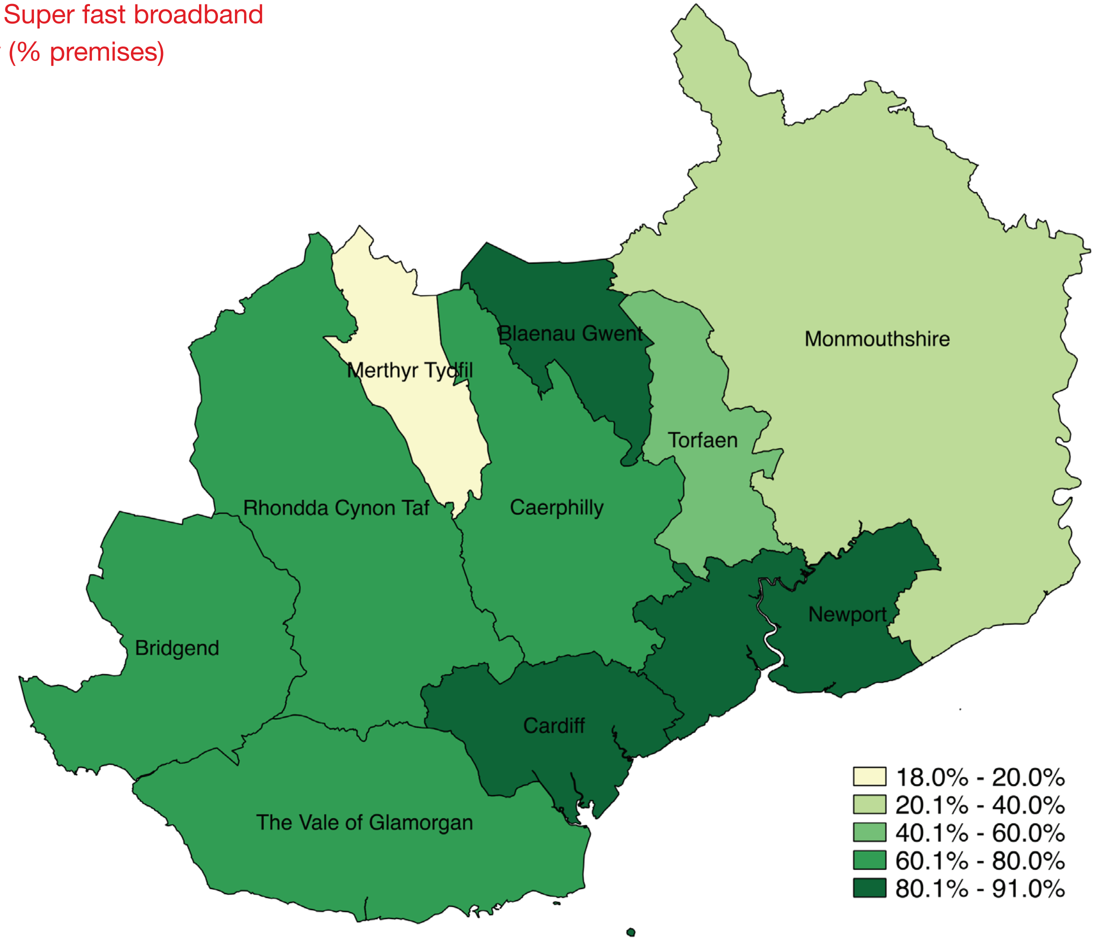


Figure 44: Super fast broadband availability (% premises)



WEALTH AND DEPRIVATION

- Only three unitary authorities exceed the Cardiff Capital Region's median hourly gross pay of full time workers of £12.30/hr based on workplace.
- Comparing workplace wages and resident wages, Monmouthshire and The Vale of Glamorgan have particularly high differences, with residential annual gross wages for full time workers being £6,785 and £3,354 higher, respectively, than for those that work there.
- 130,000 employee jobs in the city region were paid below the Living Wage in 2015.
- Between 2008 and 2015, Blaenau Gwent saw strong wage growth for both workplace and residence pay, while The Vale of Glamorgan was the only authority to see declines.

Figure 45: Median hourly gross pay of full time workers by workplace (2015)

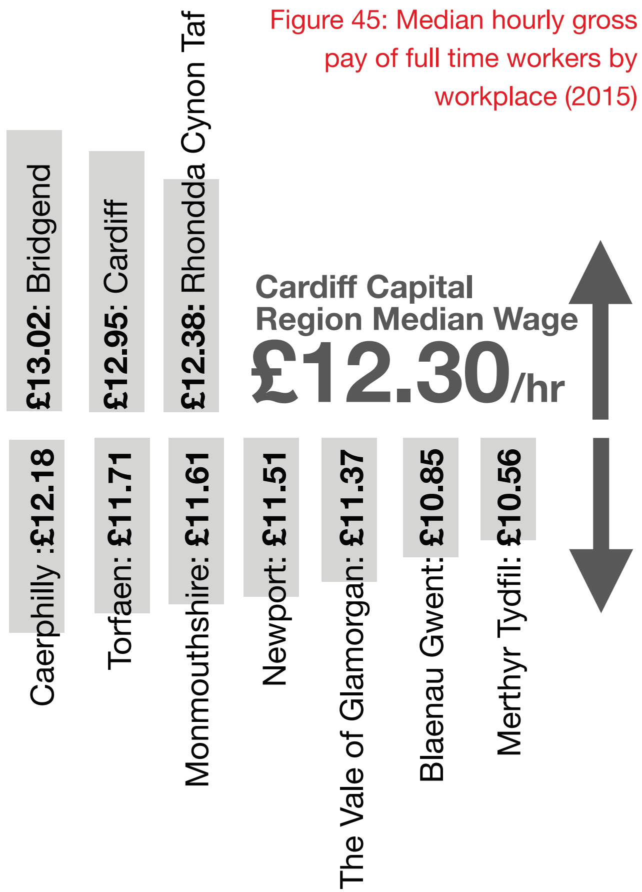


Figure 46: Median annual gross pay of full time workers by location (2015)

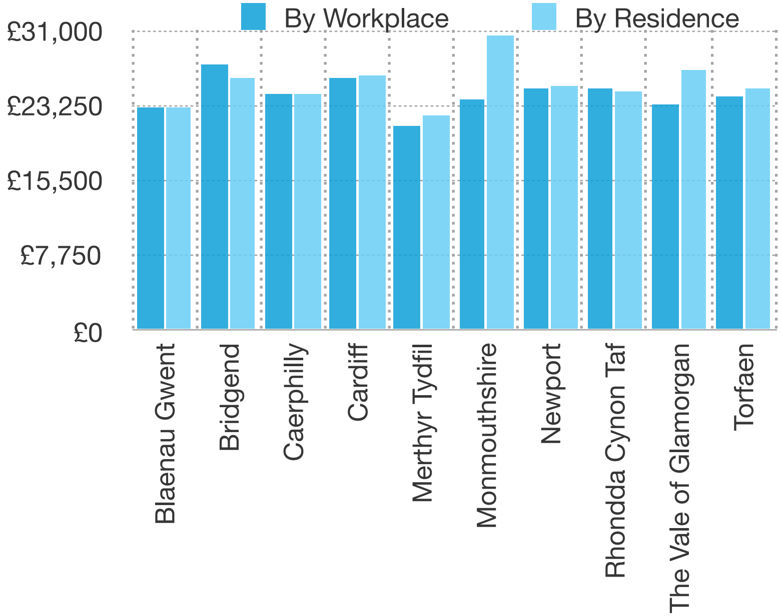
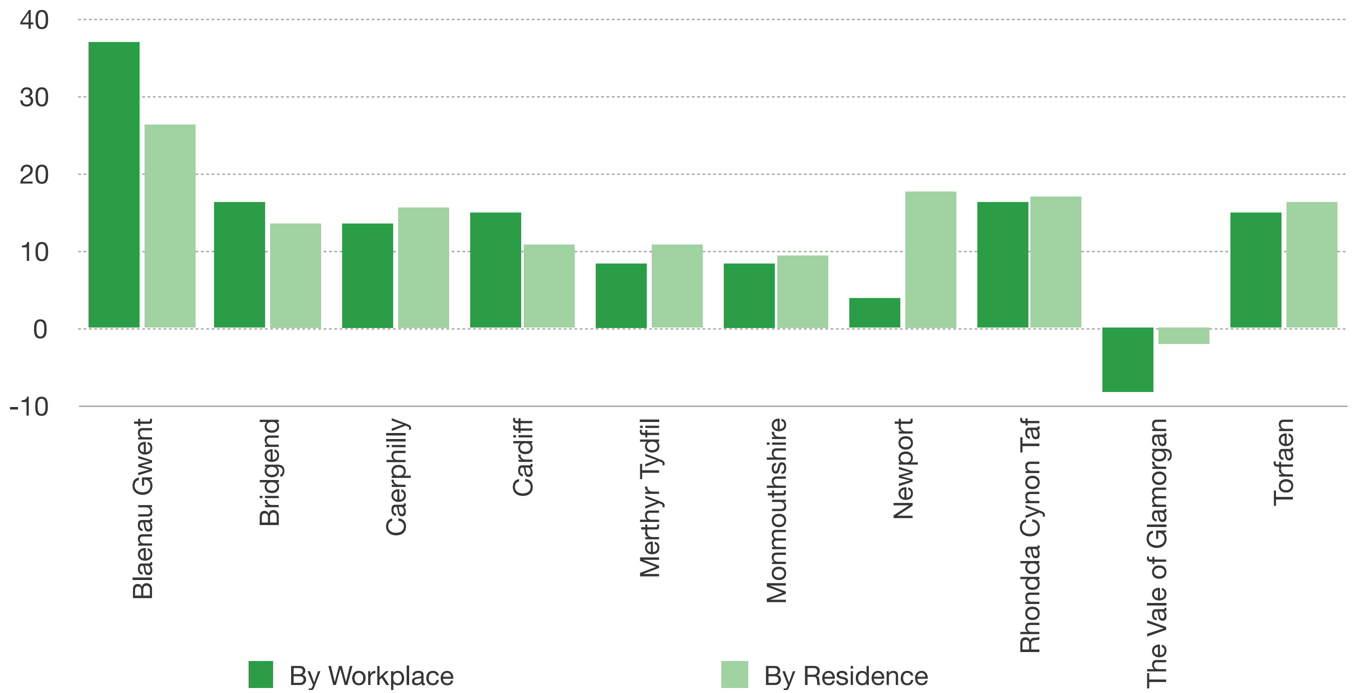


Figure 47: Employee jobs paid below the Living Wage (2015)

Unitary Authority	Number	%
Blaenau Gwent	5,000	25.3
Bridgend	11,000	20.9
Caerphilly	10,000	21.9
Cardiff	37,000	20.2
Merthyr Tydfil	6,000	26.4
Monmouthshire	10,000	26.6
Newport	17,000	25.6
Rhondda Cynon Taf	19,000	26.8
Torfaen	8,000	28.1
Vale of Glamorgan	7,000	23.3

Figure 48: Percentage change in median annual gross pay of full time workers by location (2008-2015)



- Crude mortality rates within the Cardiff Capital Region show high levels of variation, from 11.2 per 1,000 people in Blaenau Gwent to 7.7 per 1,000 people in Cardiff.
- The difference is even more stark when looking at infant mortality rates, where highs of 6.7 per 1,000 live births are reported in Merthyr Tydfil compared to 1.4 per 1,000 live births in Caerphilly.
- Of the 20% most deprived communities identified in the Welsh Index of Multiple Deprivation a majority are located within the city region.

Figure 49: Mortality rates (2014)

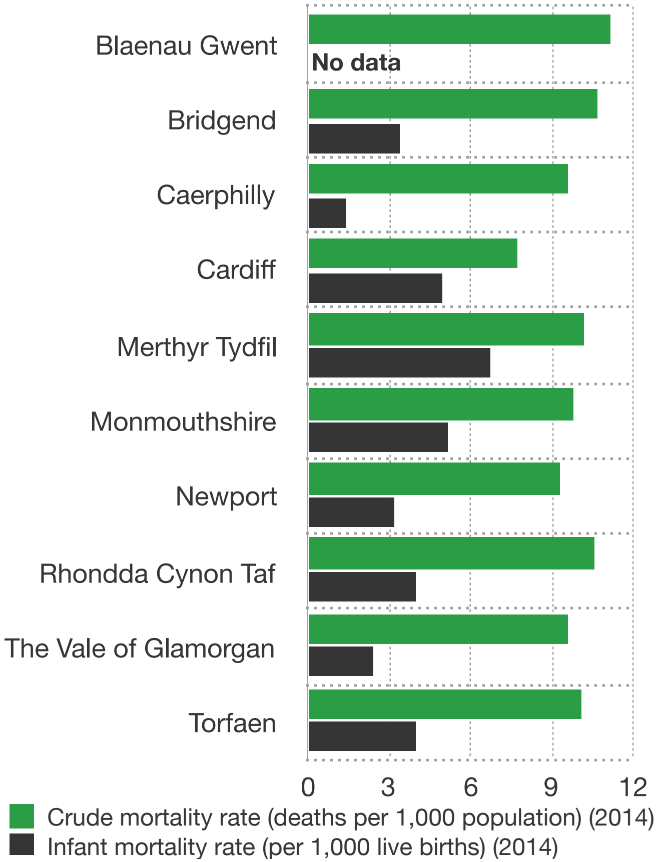
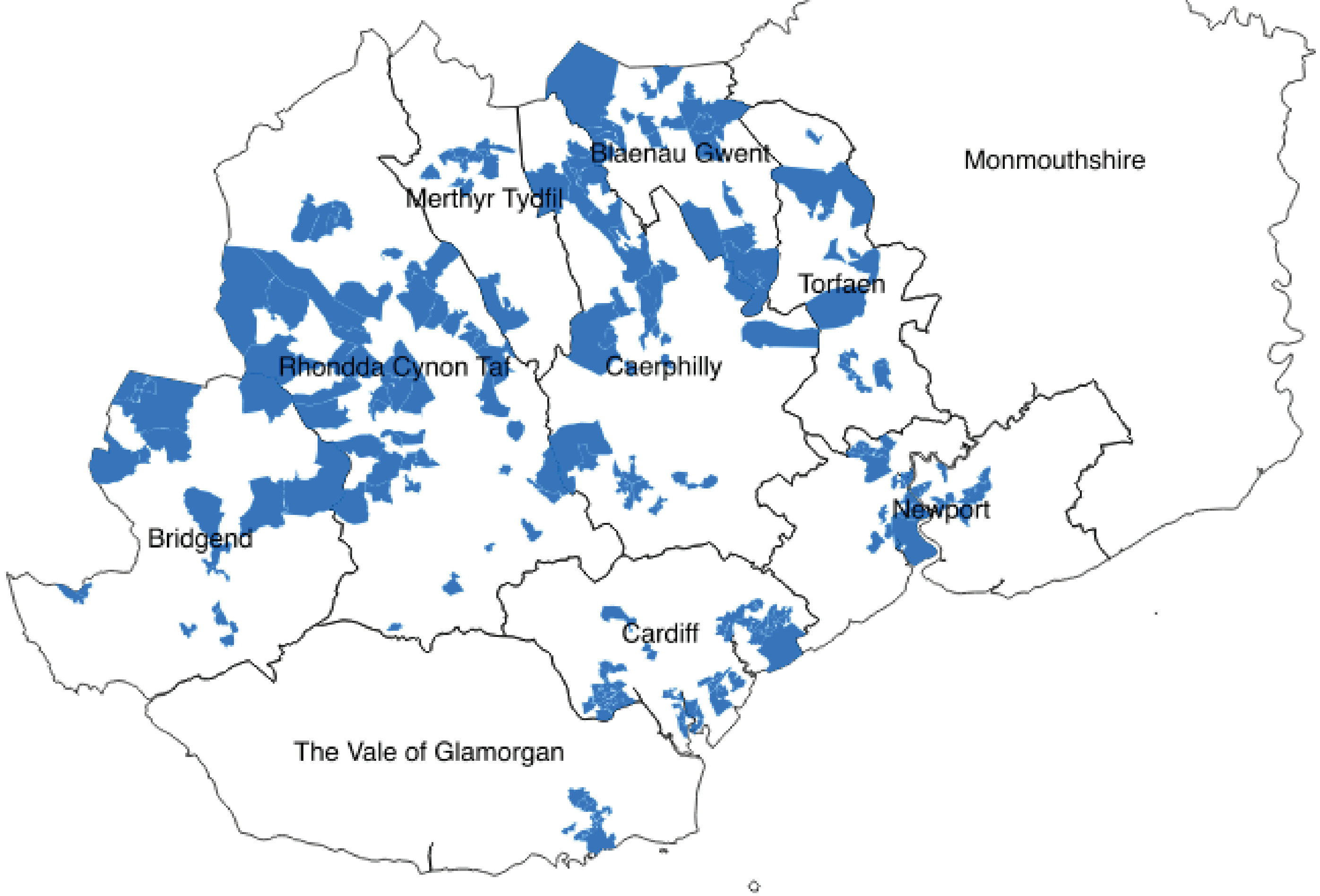


Figure 50: 20% most deprived communities in Wales (showing CCR only) (2014)

65% of the most deprived communities in Wales are in the Cardiff Capital Region



- Half of the authorities within the city region have seen strong improvements in the percentage of pupils eligible for free school meals, with Merthyr Tydfil seeing a 24.1% reduction between 2005/06 and 2015/16. The other half have seen increases, with The Vale of Glamorgan (+10.2%) and Cardiff (+8.9%) seeing the greatest increases.
- The debt burden measured through the value of personal loans is quite variable throughout the Cardiff Capital Region, with particularly low levels seen in parts of Cardiff and Monmouthshire.
- Council tax levels are also variable and but will be impacted by the range of house prices in each authority.

Figure 51: Percentage change in pupils eligible for free school meals (2005/06-2015/16)

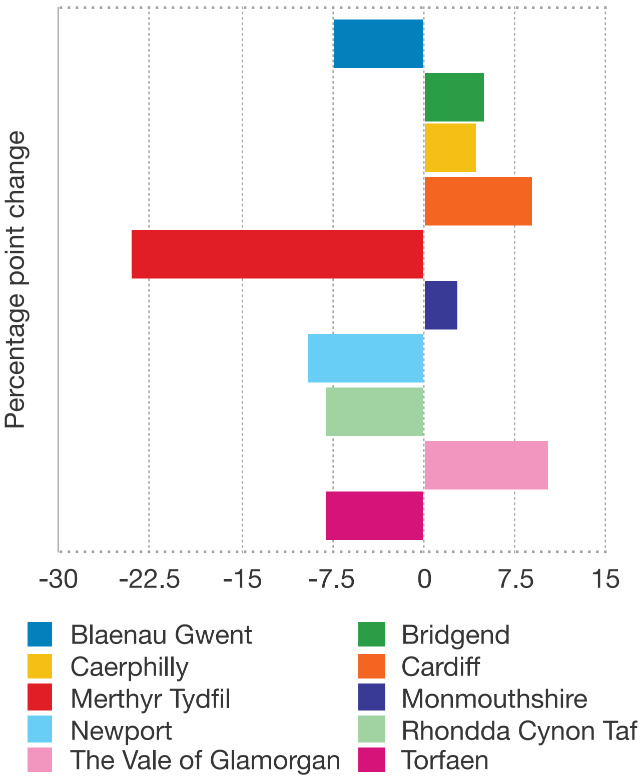


Figure 52: Value of personal loans outstanding in Great Britain (end-June 2013)

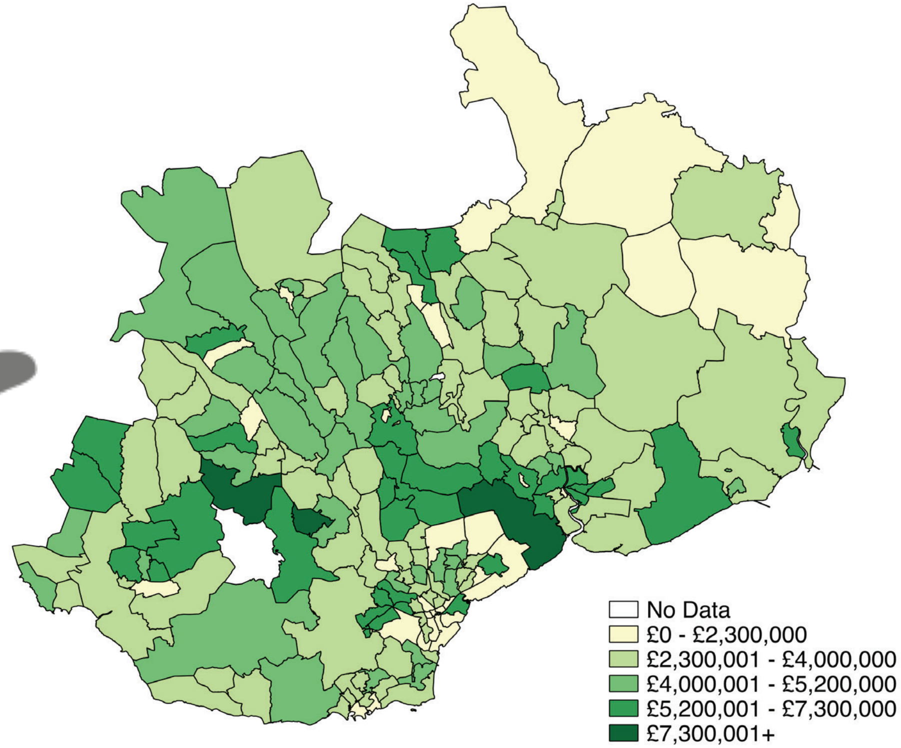
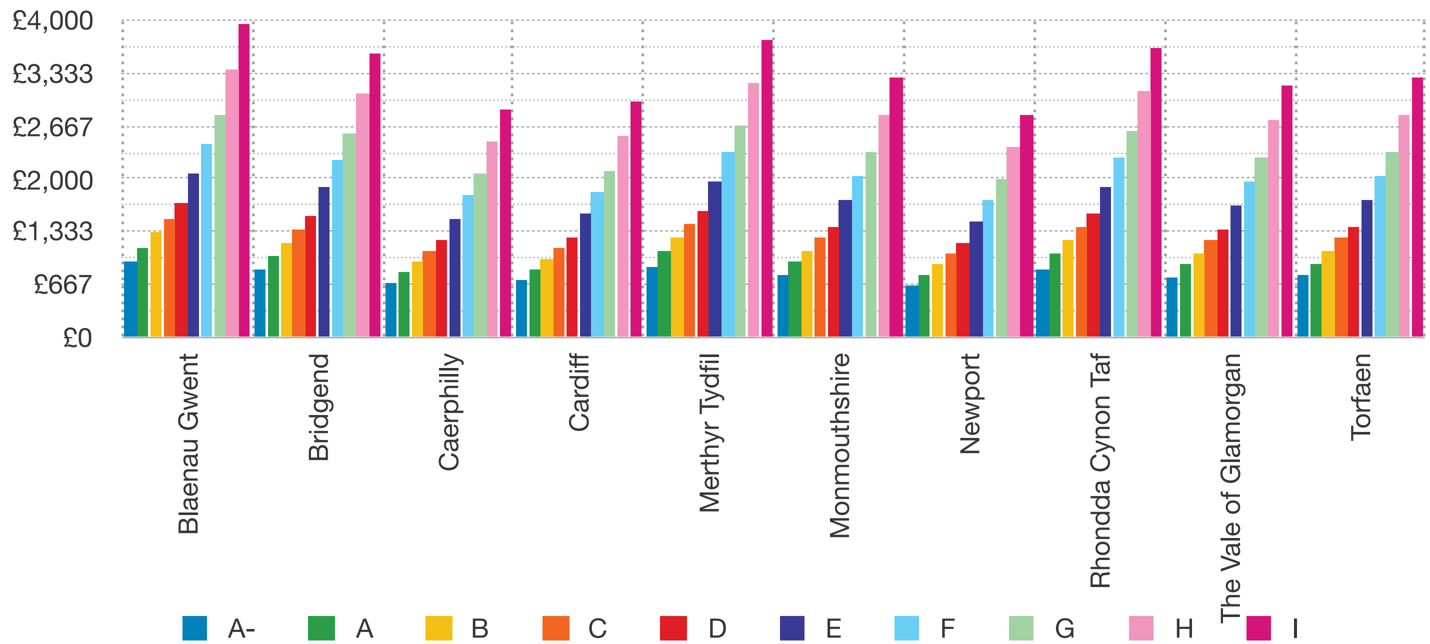


Figure 53: Council tax levels by billing authority and band (£) (2016/17)



HEALTH AND WELL-BEING

Figure 54: Percentage point change of adults who reported being obese (2007/08-2014/15)

Unitary Authority	Change
Blaenau Gwent	-1
Bridgend	2
Caerphilly	4
Cardiff	1
Merthyr Tydfil	7
Monmouthshire	2
Newport	1
Rhondda Cynon Taf	1
The Vale of Glamorgan	2
Torfaen	2

Figure 55: Percentage of adults who reported being obese (2014/15)

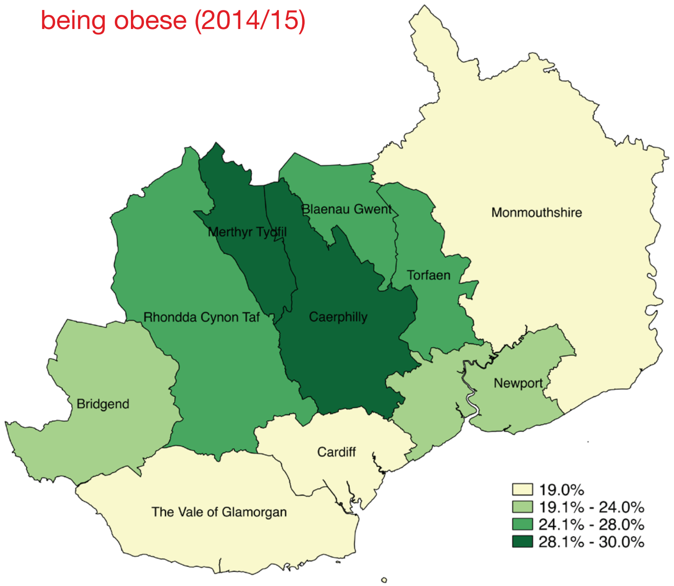
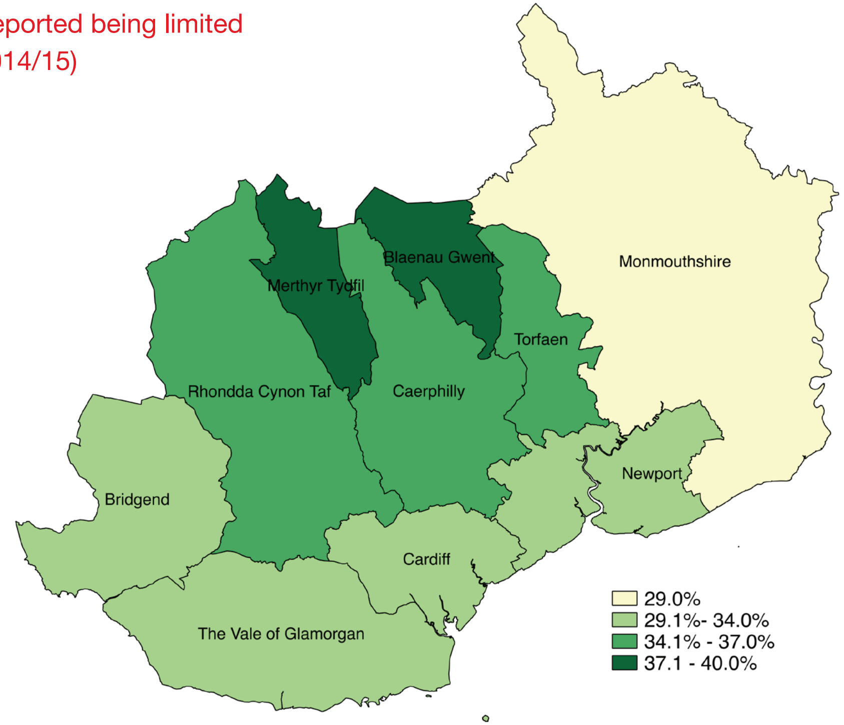
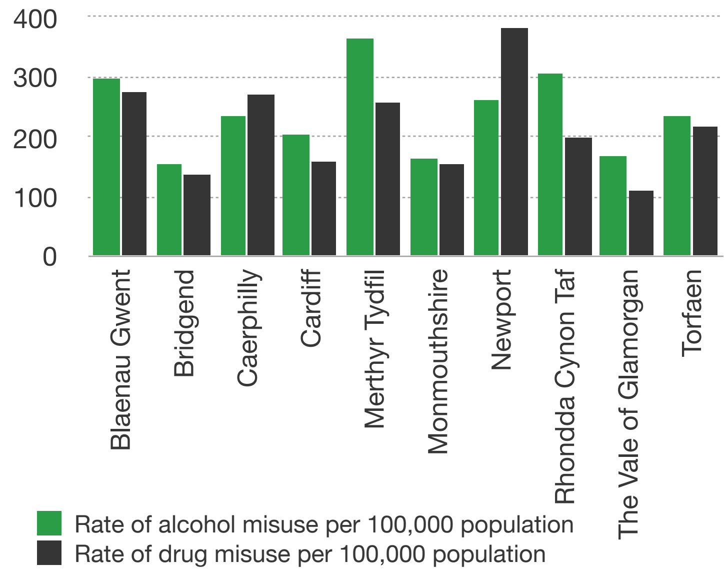


Figure 56: Percentage of adults who reported being limited at all by a health problem/disability (2014/15)



- Obesity rates have risen between 2007/08 and 2014/15 in every authority apart from Blaenau Gwent, with a particularly high increase seen in Merthyr Tydfil (+7%).
- Obesity rates remain high in Merthyr Tydfil and Caerphilly at over 28.1%, with lows of 19.0% seen in The Vale of Glamorgan, Cardiff, and Monmouthshire.
- Those who reported being limited by a health problem or disability are particularly high in Merthyr Tydfil and Blaenau Gwent.
- Rates of alcohol misuse are the highest in Merthyr Tydfil at 362 per 100,000 persons while drug misuse is highest in Newport at 380 per 100,000 persons.

Figure 57: Rate of substance misuse per 100,000 population (2015/16)



- Criminal offences have declined from quite high rates between 2003-04 to 2015-16, with Newport seeing the greatest decline (66.1 fewer offences per 1,000).
- Crime rates vary considerably across authorities in the city region, with theft rates the highest in Cardiff at 45.7 per 1,000 persons to lows of 15.4 in Bridgend.
- Rates of public order offences per 1,000 persons were highest in Merthyr Tydfil (6.4) and Cardiff (6.0).

Figure 58: Rate of all criminal offences per 1,000 population

Unitary Authority	2003-04	2015-16	Change
Blaenau Gwent	107.4	68.6	-38.8
Bridgend	93.9	45.3	-48.6
Caerphilly	93.6	56.6	-37.0
Cardiff	152.0	91.8	-60.3
Merthyr Tydfil	129.2	82.4	-46.9
Monmouthshire	72.5	44.6	-27.9
Newport	152.4	86.4	-66.1
Rhondda Cynon Taf	85.8	59.5	-26.3
The Vale of Glamorgan	87.6	51.7	-35.9
Torfaen	94.0	65.3	-28.7

*Note: Numbers may not add up due to rounding

Figure 59: Rate of more frequent crimes (2015/16)

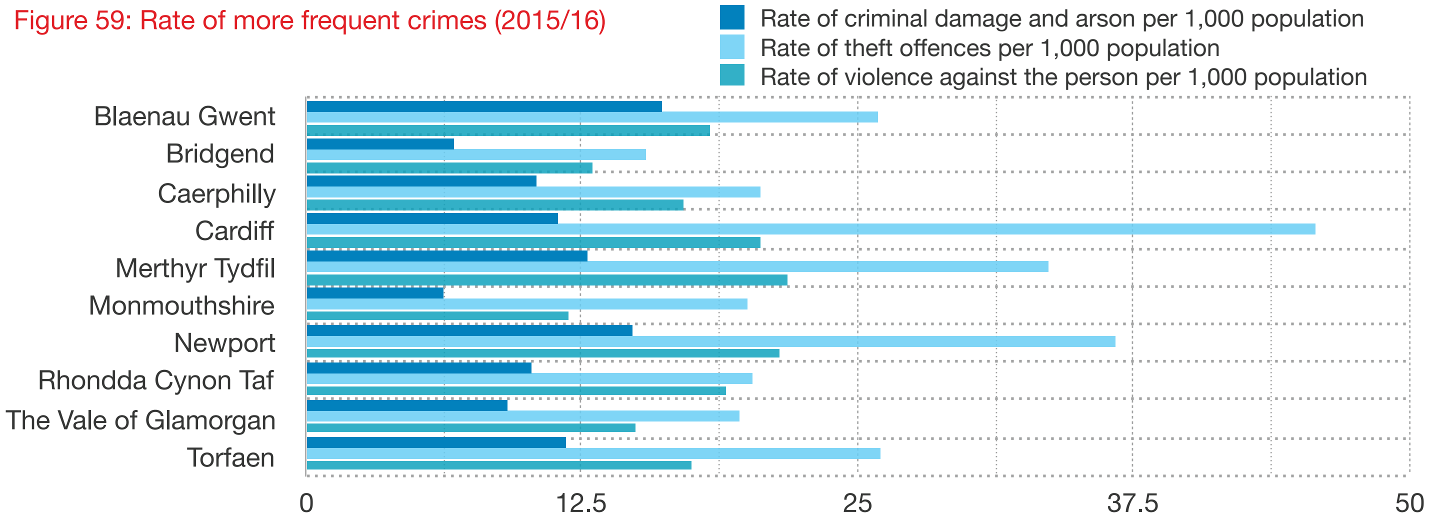


Figure 60: Rate of less frequent crimes (2015/16)

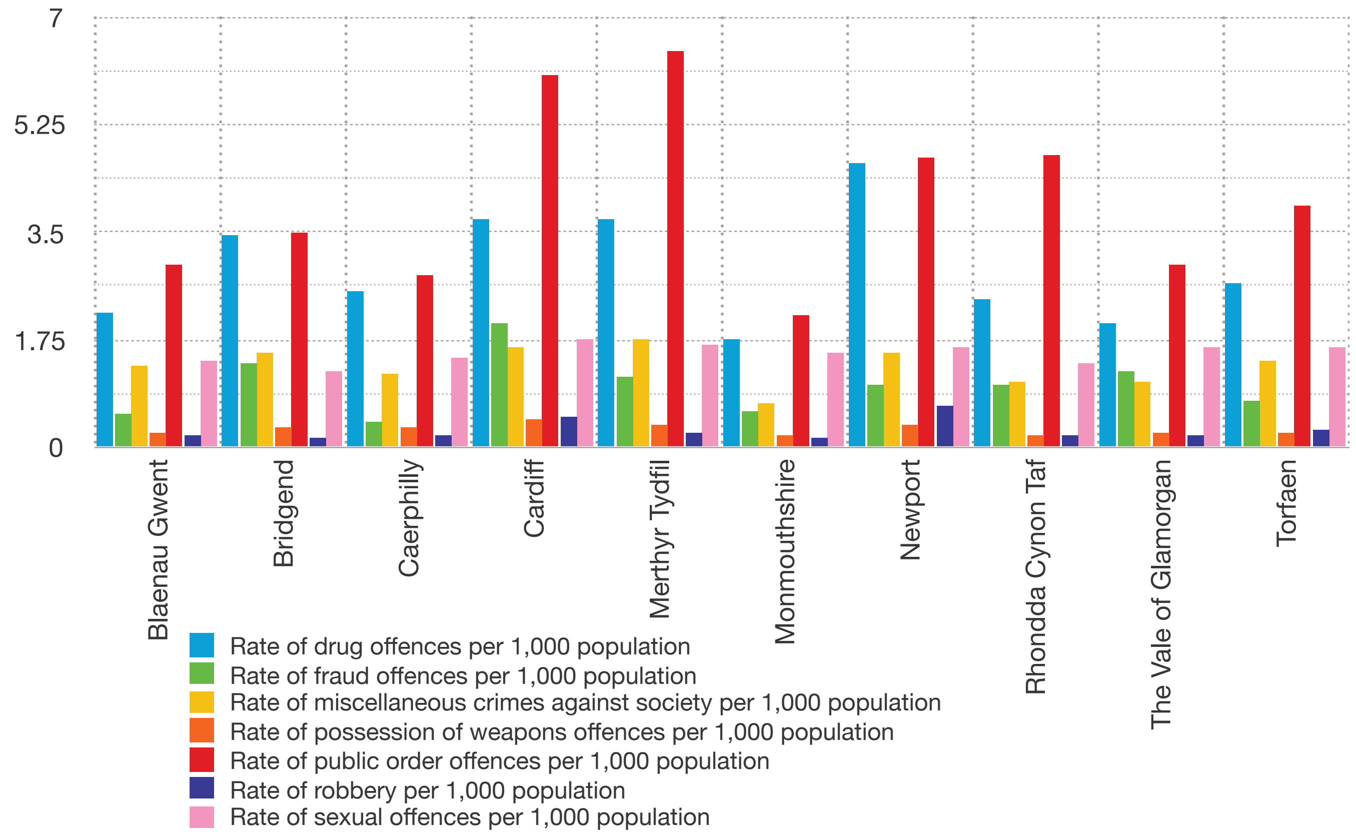


Figure 61: Estimates of personal well-being for the Cardiff Capital Region (April 2015 - March 2016)

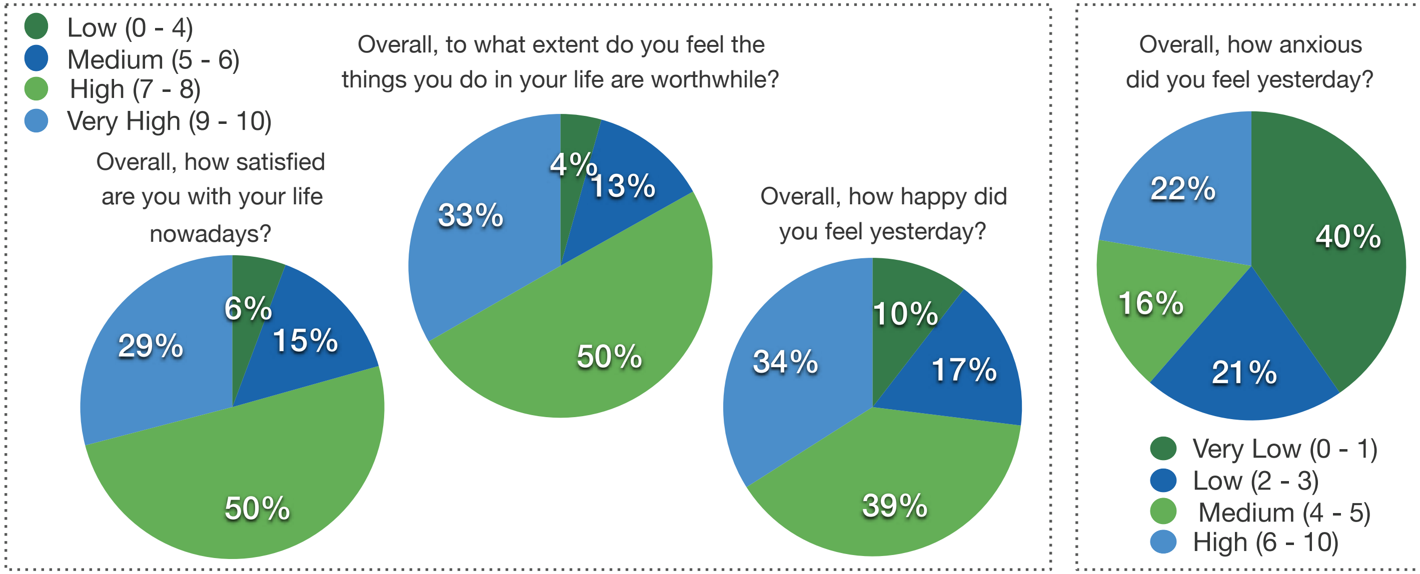
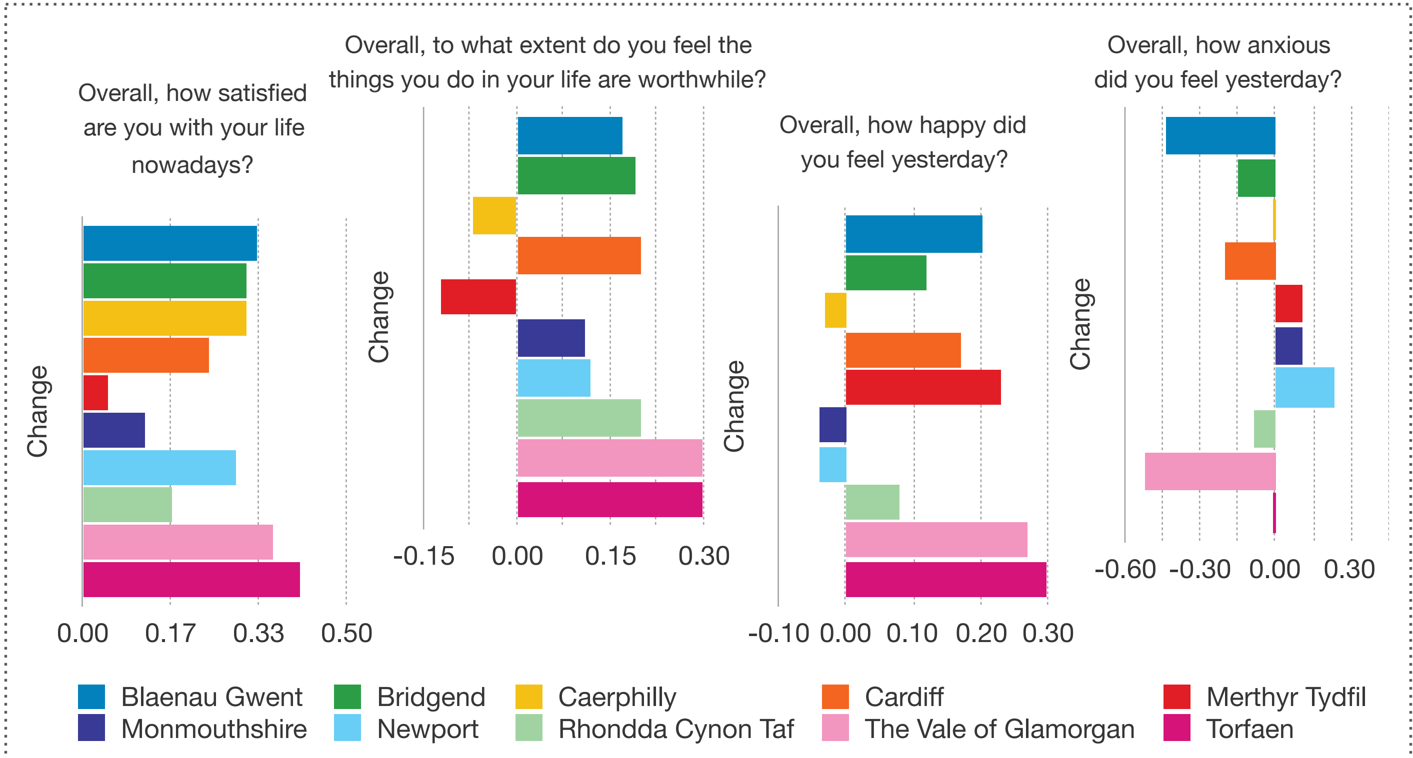


Figure 62: Rate change in LA average rating of personal well-being (2011/12 - 2015/16)



- Personal well-being levels in the Cardiff Capital Region are quite high, with 79% of people saying they had high or very high levels of satisfaction with their lives, 83% saying they had high or very high feelings that what they do is worthwhile, and 73% saying they had high or very high feelings of happiness.
- 61% of people also reported very low or low levels of anxiety.
- Since 2011/12 improvements in life satisfaction were seen in all authorities within the Cardiff Capital Region, while change on the other measures was more variable depending on the authority.

ENVIRONMENT AND BUILT HERITAGE

Figure 63: Heritage coast and Special Protection Areas

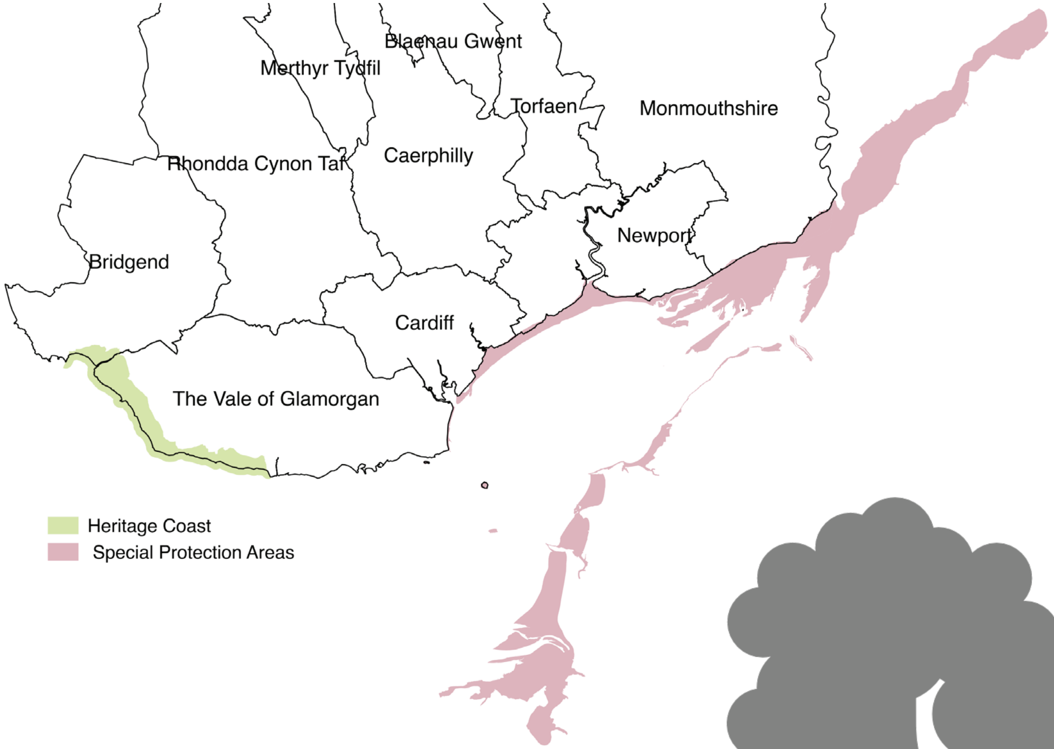
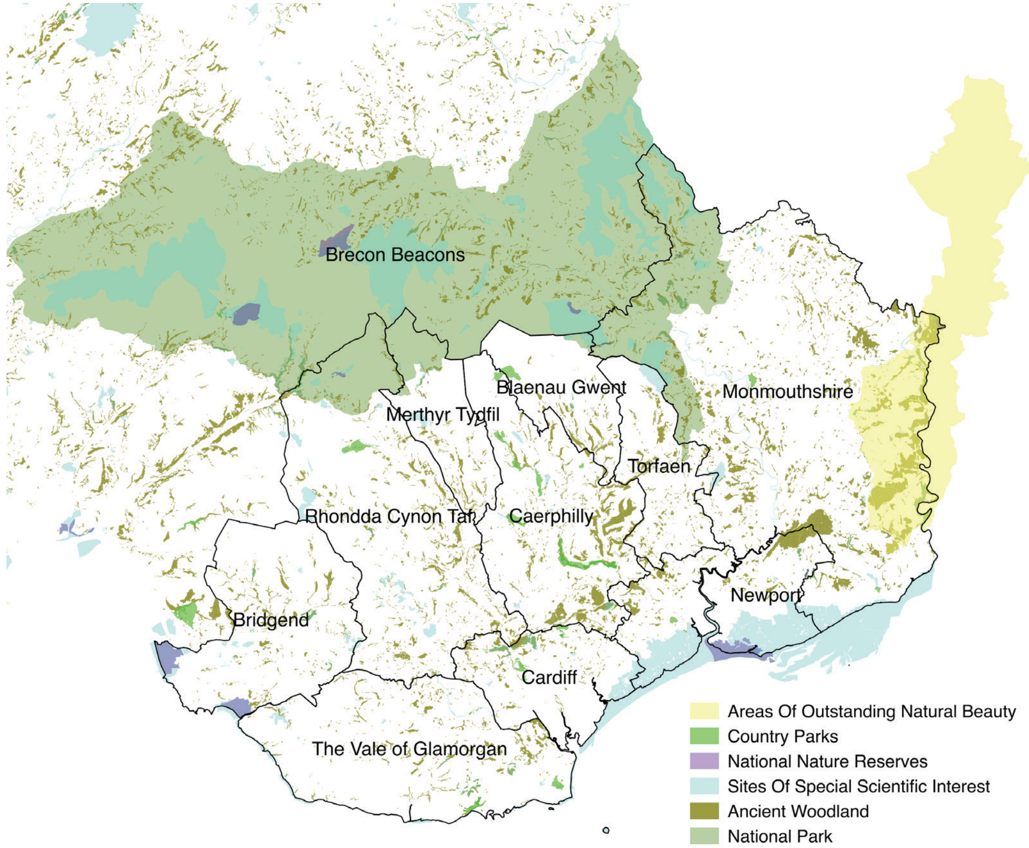


Figure 64: Designated natural environment sites



- The Cardiff Capital Region is rich in areas of natural scientific interest and beauty. It benefits from its proximity to the Brecon Beacons National Park, part of which is located within its boundaries.
- In 2015 the Brecon Beacons National Park contributed £238.93 million in economic impact from tourism.

Figure 65: Brecon Beacons National Park visitor and economic data (2015)

Total visitor days (millions)	**5.05**	**Number of staying visitors (millions)**	**0.33**
% change on 2014	5.00%	% change on 2014	11.50%
Staying visitor days (millions)	**1.24**	**Number of day visitors (millions)**	**3.82**
% change on 2014	13.20%	% change on 2014	2.60%
Total visitor numbers (millions)	**4.15**	**Total economic impact of tourism £M**	**238.93**
% change on 2014	3.30%	Percentage change on 2014	7.80%

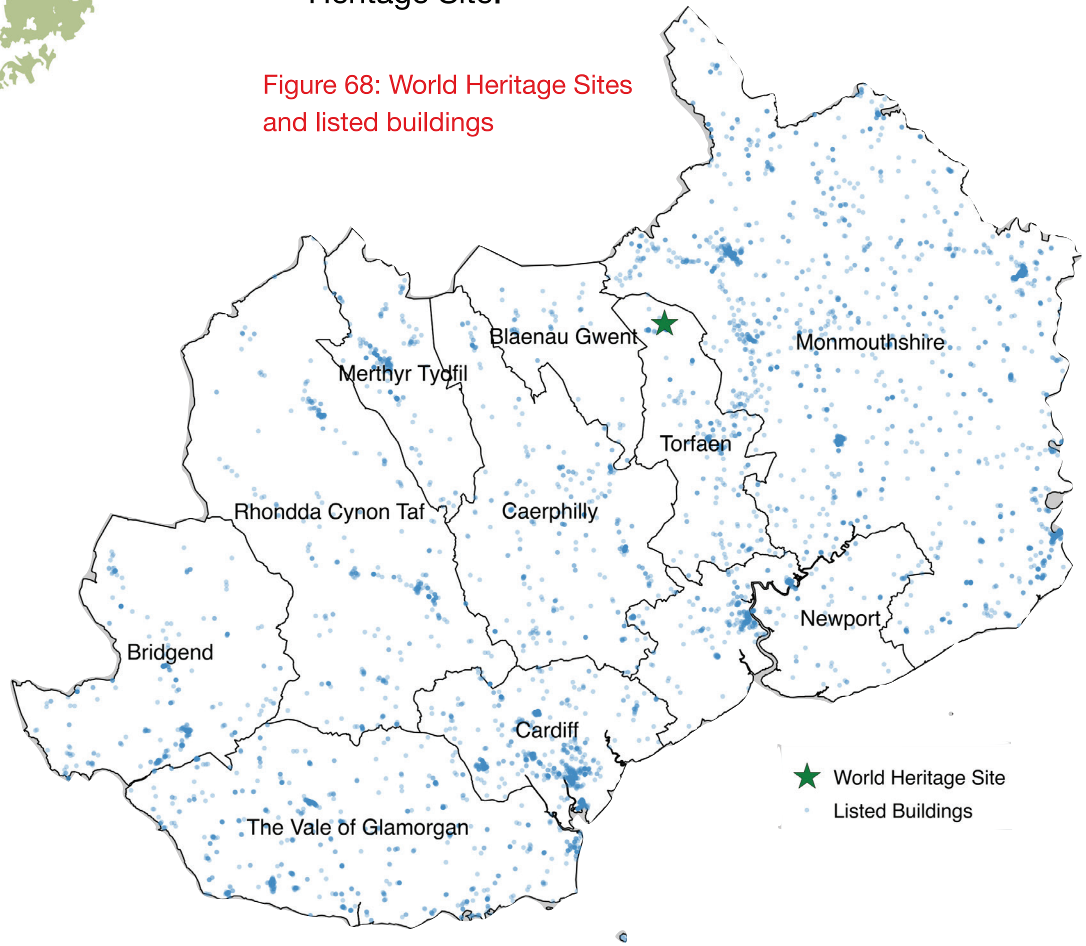
Figure 66: Woodland regions

Figure 67: Ratio of carbon dioxide emissions to GVA at current prices (2005-2012)

Area	2005	2012	% Change
Monmouthshire and Newport	690	473	-31.4
Gwent Valleys	662	446	-32.6
Central Valleys	611	417	-31.8
Cardiff and Vale of Glamorgan	482	324	-32.8
Bridgend and Neath Port Talbot	2553	1566	-38.7

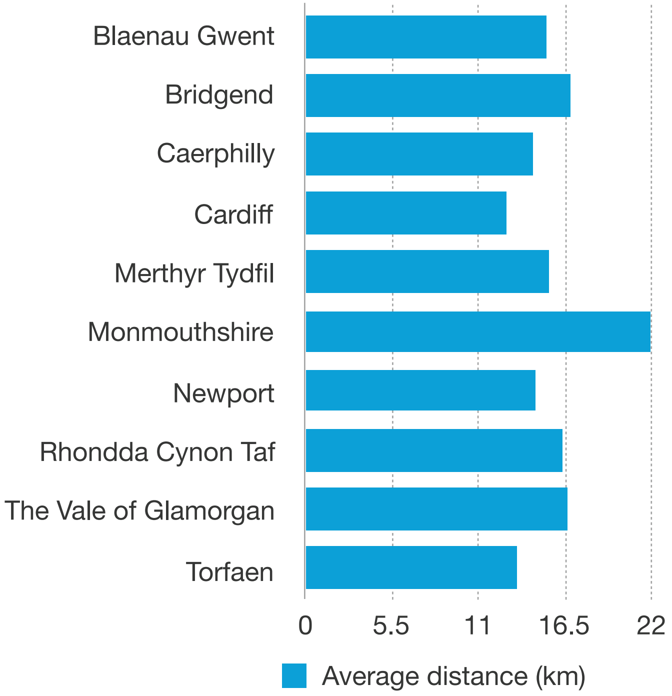
- The geography of the city region provides for a wide range of woodland regions that residents can access for leisure purposes.
- There has been a decline of over 30% in the ratio of carbon dioxide emissions to GVA between 2005 and 2012 in all parts of the city region.
- The Cardiff Capital Region contains 6,070 listed buildings located across all ten unitary authorities and the Blaenavon Industrial Landscape UNESCO World Heritage Site.

Figure 68: World Heritage Sites and listed buildings



TRANSPORTATION AND INFRASTRUCTURE

Figure 69: Average distance travelled to work, residents aged 16-74 (2011)



- Commuters in the Cardiff Capital Region on average travel over 12km to work, with the longest journeys being those originating in Monmouthshire (21.9km)
- There are several identifiable commuting areas within the city region, focused on a number of urban centres.
- The commuter belt to Cardiff city centre stretches across South Wales and to Bristol. While diverse, it is predominately composed of persons with a higher than average propensity to travel to work by bus, train, bike and on foot, those who work in consumer services, as well as public administration, defence, taxation and social security fields, and to a lesser extent finance.

Figure 70: Commuting flows (net origin-destination) (2011)

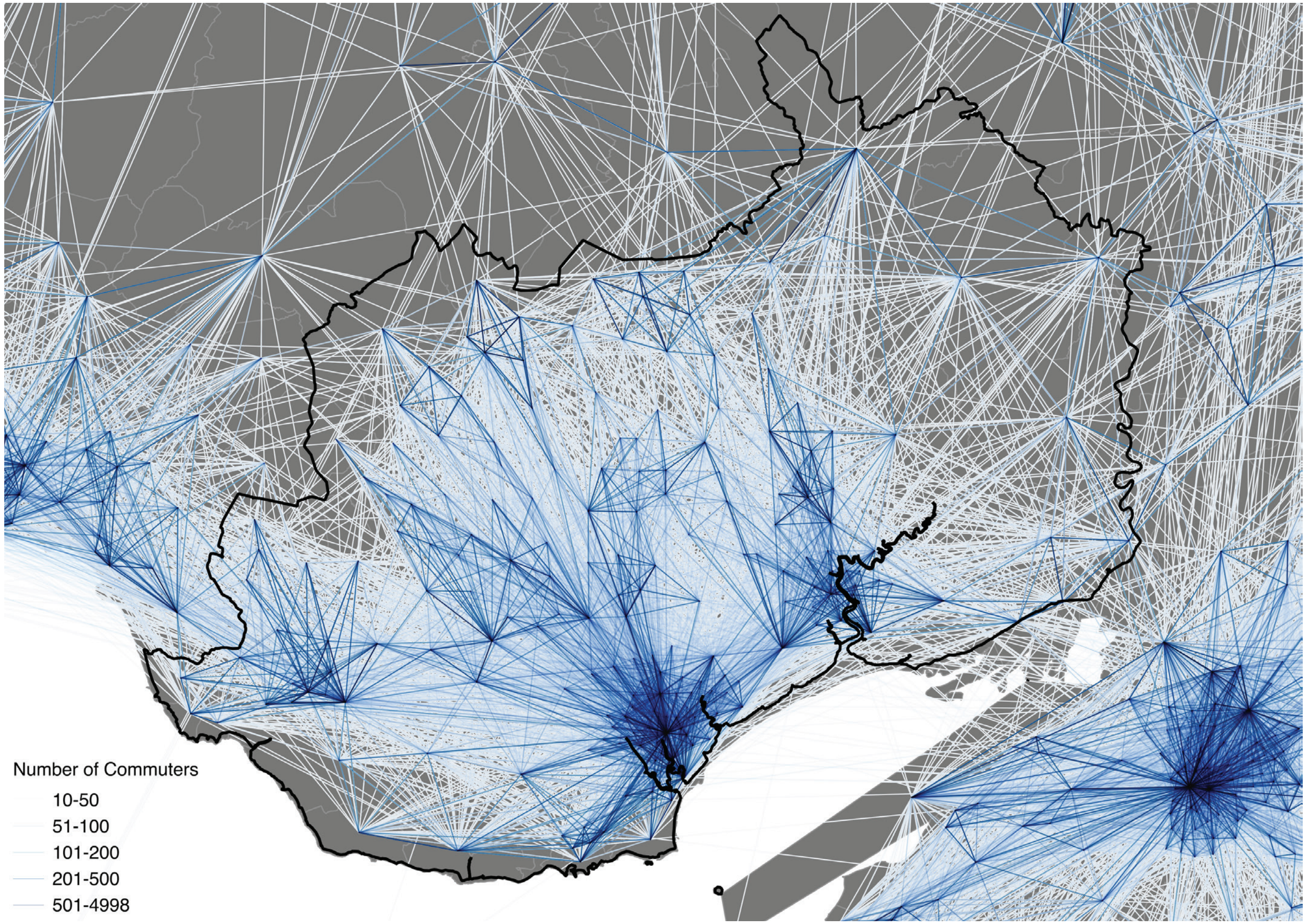


Figure 71: Dominant commuting types to Cardiff city centre (2011) based on www.commute-flow.net classification

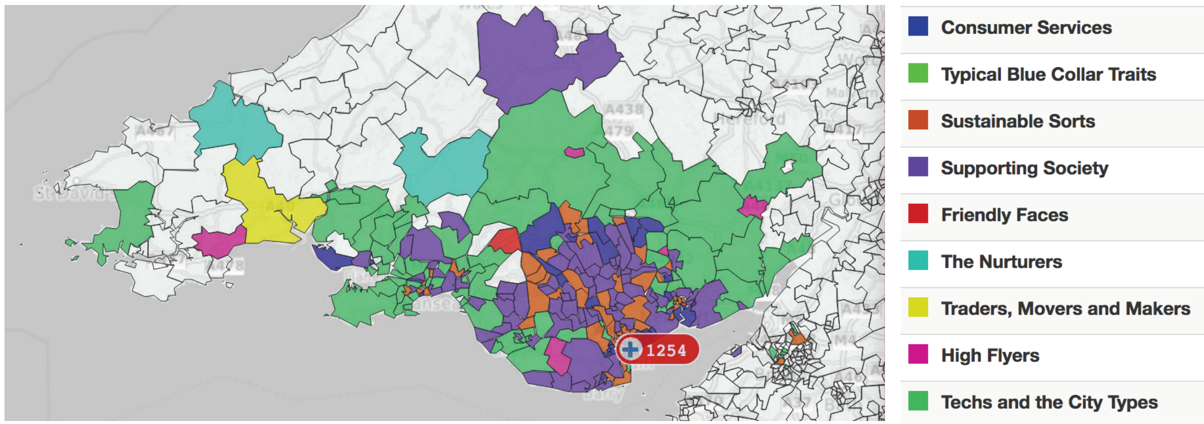
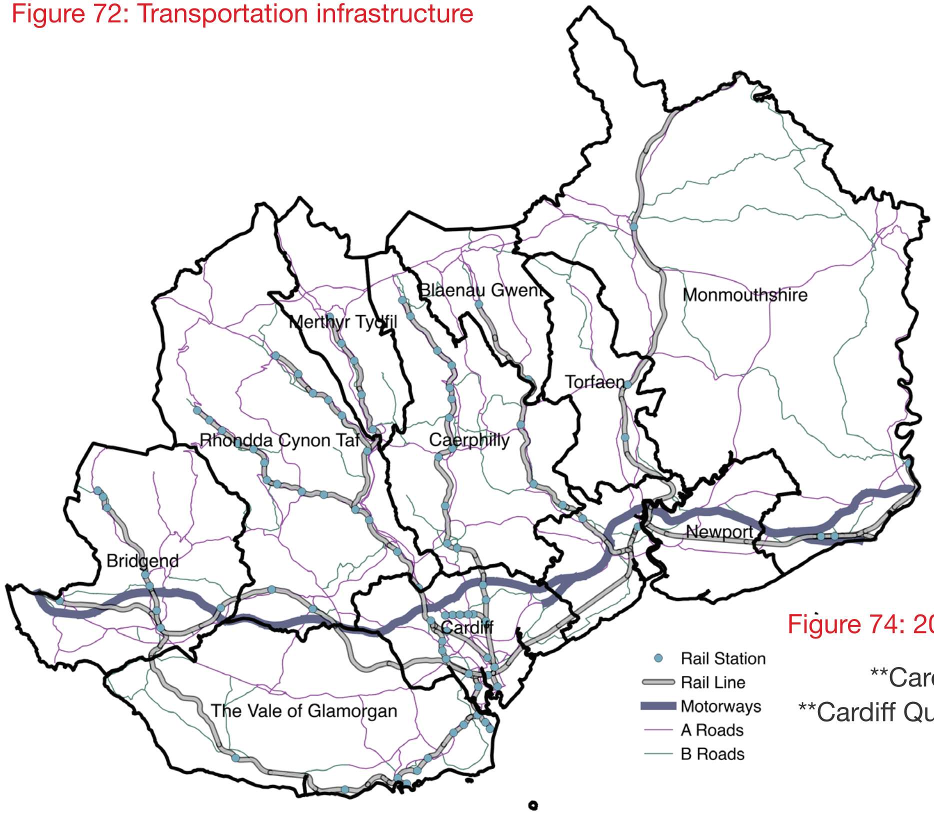


Figure 72: Transportation infrastructure



- Rail usage has increased in all authorities from 2002/03 and 2012/13, with the largest increase being accounted for by the re-opening of the Ebbw Vale line in 2008. Bridgend also saw a strong rise in rail passenger journeys.
- Despite the increases in rail travel, the dominant mode of transport to work in the city region remains the car with over 70% of residents in half of the authorities choosing to drive to work.
- The top three busiest stations in Wales are in the Cardiff Capital Region, as well as 15 of the top 20.

Figure 73: Method of travel to work, all usual residents aged 16 to 74 (2011)

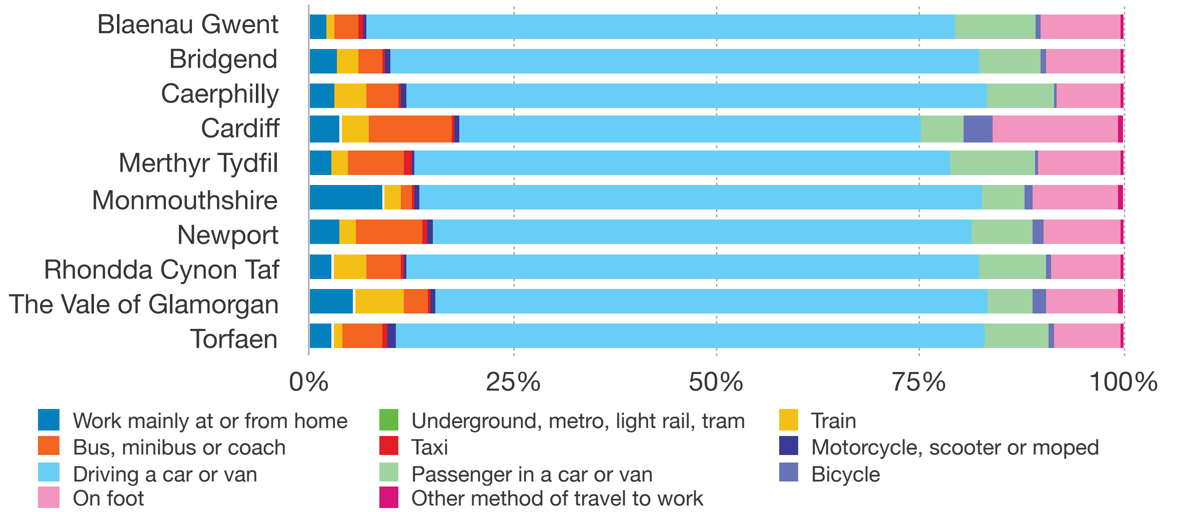


Figure 74: 20 busiest stations in Wales by station entries/exits (2014-2015)

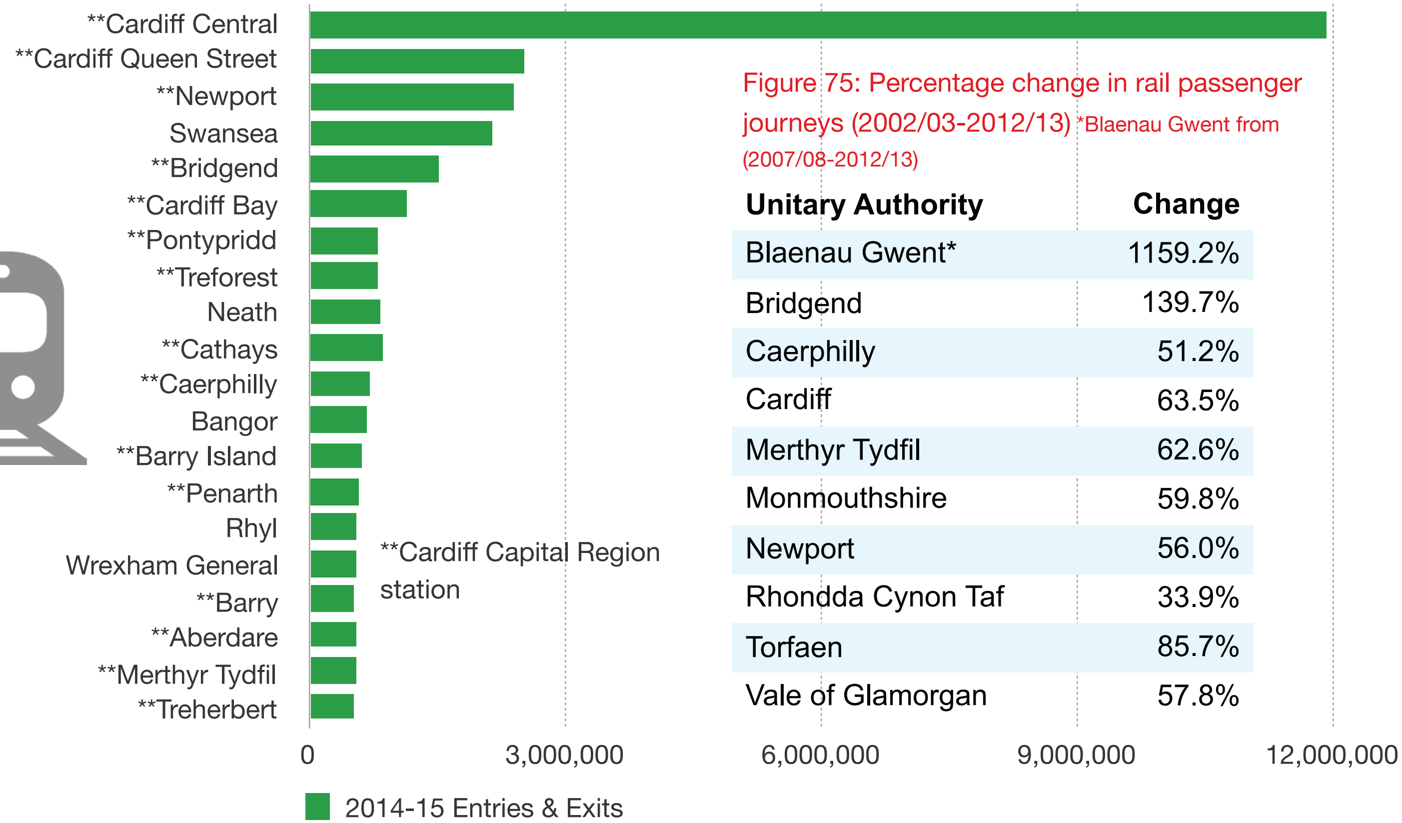
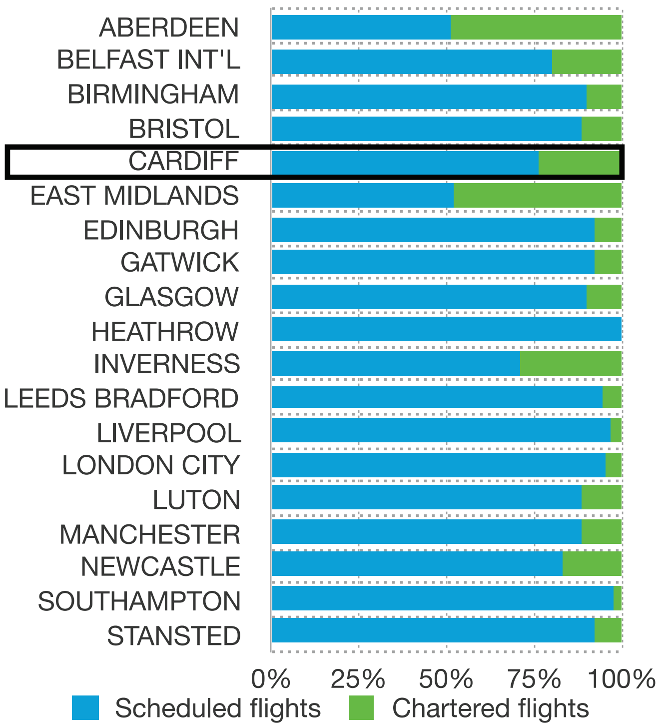


Figure 75: Percentage change in rail passenger journeys (2002/03-2012/13) *Blaenau Gwent from (2007/08-2012/13)

Unitary Authority	Change
Blaenau Gwent*	1159.2%
Bridgend	139.7%
Caerphilly	51.2%
Cardiff	63.5%
Merthyr Tydfil	62.6%
Monmouthshire	59.8%
Newport	56.0%
Rhondda Cynon Taf	33.9%
Torfaen	85.7%
Vale of Glamorgan	57.8%

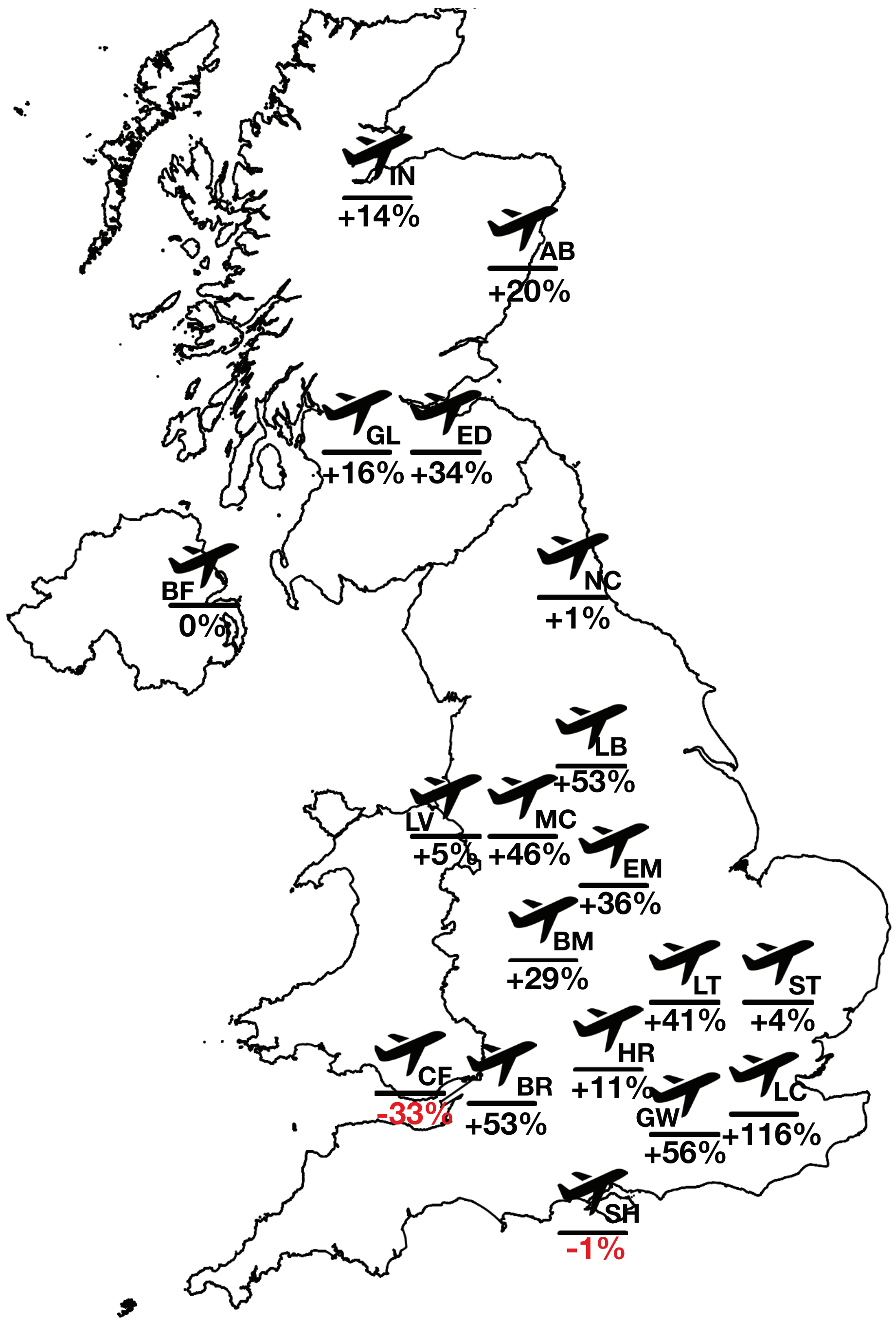
Figure 76: Air transport movements, scheduled vs chartered flights (2015)



- Cardiff Airport has a much higher mix of scheduled to chartered flights than most other major airports in the UK. Scheduled flights are often used as an indicator of business travel use. Only 76% of all flights out of Cardiff Airport in 2015 were scheduled flights compared to most other major UK airports which typically have over 88% of flights as scheduled, such as Bristol Airport.
- Cardiff Airport was one of the only major airports in the UK to see a decline in passenger numbers on scheduled flights between 2005 and 2015. However this pattern has begun to reverse in recent years.

Figure 77: Percentage change in terminal passengers from scheduled flights (2005-2015)

More than 290,000 fewer passengers flew on scheduled flights from Cardiff Airport in 2015 compared to 2005



- Between 2005 and 2015 all ports in and around the Cardiff Capital Region, apart from Newport, saw declines in the volume of freight carried.
- The greatest decline during this period was at Sharpness (-54%) in Gloucestershire and Neath (-53%) in Neath Port Talbot.
- Total goods lifted in Wales for domestic or international haulage also declined within Wales, with the greatest percentage declines being exports to outside the UK (-30.4%) and the greatest absolute declines being within Wales (-16,302 thousand tonnes).

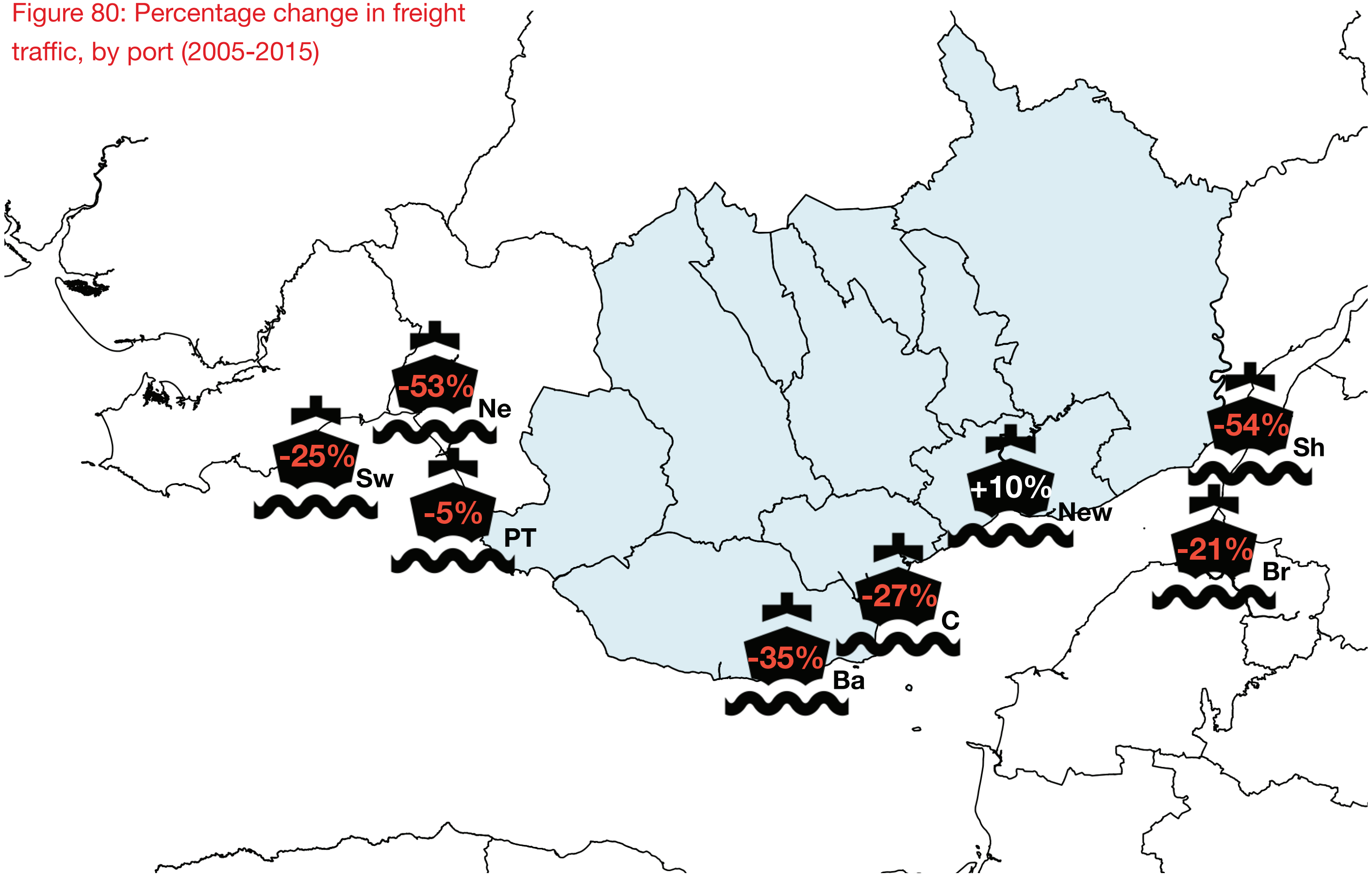
Figure 78: Change in freight traffic, by port, in thousands of tonnes (2005-2015)

Port	2005	2015	Change
Barry	318	207	-111
Bristol	11206	8877	-2329
Cardiff	2450	1791	-659
Neath	406	192	-214
Newport	959	1055	96
Port Talbot	8573	8113	-460
Sharpness	130	60	-70
Swansea	695	518	-177

Figure 79: Change in goods lifted in Wales for domestic or international haulage, by origin and destination, in thousand tonnes (2003-2013)

Year	Within Wales	To Wales from rest of UK	From Wales to rest of UK	Imports from outside the UK	Exports to outside the UK
2003	59,201	26,458	27,908	367	570
2013	42,899	23,348	23,832	269	397
Absolute Change	-16,302	-3,110	-4,076	-98	-173
Percentage Change	-27.5	-11.8	-14.6	-26.7	-30.4

Figure 80: Percentage change in freight traffic, by port (2005-2015)



SOURCES

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Figure 2: Welsh Government: Population estimates by local authority and year, 2016

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Figure 4: ONS: Census of population, 2011

Figure 5: ONS: National population projections, 2014-based, ONS: Subnational population projections for England, 2014-based, Welsh Government: Local authority population projections for Wales, 2014-based, NRS: Population projections for Scottish areas, 2012-based

Figure 6: ONS: National population projections, 2014-based, ONS: Subnational population projections for England, 2014-based, Welsh Government: Local authority population projections for Wales, 2014-based, NRS: Population projections for Scottish areas, 2012-based

Figure 7: ONS: National population projections, 2014-based, ONS: Subnational population projections for England, 2014-based, Welsh Government: Local authority population projections for Wales, 2014-based, NRS: Population projections for Scottish areas, 2012-based

Figure 8: ONS population estimates (incorporating NRS and NISRA estimates)

Figure 9: ONS population estimates (incorporating NRS and NISRA estimates)

Figure 10: ONS population estimates - local authority based by single year of age, 2015

Figure 11: ONS: Census of population, 2011

Figure 12: ONS: Census of population, 2001 and 2011

Figure 13: 2014-based projections for local authorities in Wales, Welsh Government

Figure 14: ONS: Census of population, 2001 and 2011

Figure 15: Homelessness data collection, Welsh Government

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Figure 18: ONS: Subregional Productivity, 2015

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Figure 19: ONS: Subregional Productivity, 2015

Figure 20: ONS: Regional Gross Value Added (Income Approach) reference tables, 2015

Figure 21: ONS: Annual Population Survey, 2016

Figure 22: ONS: Annual Population Survey, 2016

Figure 23: ONS: Claimant Count by Sex and Age, 2016

Figure 24: ONS: Annual Population Survey, 2016

Figure 25: ONS: Annual Population Survey, 2016

Figure 26: ONS: Annual Population Survey, 2016

Figure 27: ONS: Annual Population Survey, 2016

Figure 28: ONS: Jobs Density, 2016

Figure 29: ONS: Annual Population Survey, 2016

Figure 30: ONS: Jobs Density, 2016

Figure 31: ONS: Annual Population Survey, 2016

Figure 32: FAME database, Bureau van Dijk and Jordans, 2015 with Google Maps compiled by Anthony Soroka, Cardiff Business School, Cardiff University.

Figure 33: ONS: Business Demography, 2014

Figure 34: British Bankers' Association: SME lending by postcode, 2013

Figure 35: ONS: Census of population, 2011

Figure 36: ONS: Census of population, 2011

Figure 37: ONS: Annual Population Survey, 2016

Figure 38: ONS: Annual Population Survey, 2016

Figure 39: ONS: UK Innovation Survey, 2015 with tables produced by the ONS Sub-National Economic Policy Branch, Public Policy Division

Figure 40: ONS: UK Innovation Survey, 2015 with tables produced by the ONS Sub-National Economic Policy Branch, Public Policy Division

SOURCES

Figure 41: Commute-flow typology developed by Manchester Urban Institute, University of Manchester using Census of population 2011 data: Open Government License, All maps contain National Statistics data © Crown copyright and database right 2012 & contain Ordnance Survey data © Crown copyright and database right 2012

Figure 42: Ofcom: UK home broadband performance, November 2015 - chart data

Figure 43: Ofcom: UK fixed-line broadband performance, November 2014 - The performance of fixed-line broadband provided to UK residential consumers - chart data

Figure 44: Ofcom: UK fixed-line broadband performance, November 2014 - The performance of fixed-line broadband provided to UK residential consumers - chart data

Figure 45: ONS: Annual Survey of Hours and Earnings, 2016

Figure 46: ONS: Annual Survey of Hours and Earnings, 2016

Figure 47: Bevan Foundation: Fair Pay: A Living Wage Cardiff Capital Region, 2016, p. 5

Figure 48: ONS: Annual Survey of Hours and Earnings, 2016

Figure 49: ONS: Mortality Statistics: Deaths Registered by Area of Usual Residence, 2014 Registrations

Figure 50: Welsh Government: Welsh Index of Multiple Deprivation, 2014

Figure 51: Welsh Government: Pupils eligible for free school meals by local authority, region and year

Figure 52: British Bankers' Association: Unsecured personal loans by postcode, 2013

Figure 53: Welsh Government: Council tax levels by billing authority and band (£) (2016/17)

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Figure 56: Welsh Government: Welsh Health Survey, % of adults who reported being limited at all by a health problem/disability, 2005-2015

Figure 57: Welsh Government: Welsh Health Survey, Rate of substance misuse per 100,000 population, 2005-2015

Figure 58: Crime Survey for England and Wales, Rate of all criminal offences per 1,000 population, 2015

Figure 59: Crime Survey for England and Wales, 2015

Figure 60: Crime Survey for England and Wales, 2015

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Figure 61: ONS: Annual Population Survey, 2016

Figure 62: ONS: Annual Population Survey, 2016

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