

Well-being objective 5: A capital city that works for Wales

Cardiff Assessment of Local Well-being

Nb: This assessment has been carried out using the most recently available data. In many cases this does not capture the full impact of the global COVID-19 pandemic. The pandemic also saw the suspension of collection of some datasets.

This document is available in Welsh / Mae'r ddogfen hon ar gael yn Gymraeg

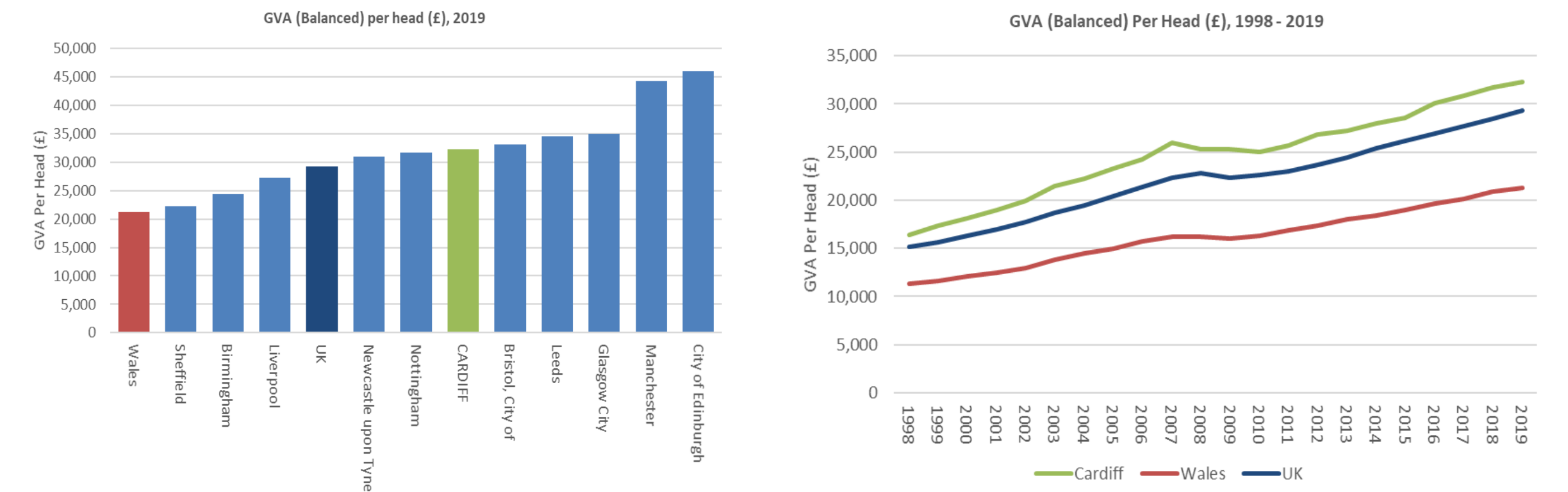
Indicators

1. GVA per head in Cardiff
2. Gross Disposable Household Income per head
3. Percentage of population aged 16-64 qualified to NVQ4+ (degree level or equivalent)
4. Unemployment rate of the economically active population age 16+
 - a) Claimant count rate/Deprivation fifth
 - b) Claimant count/gender and ward
 - c) Ethnicity
5. Percentage of employee jobs with hourly pay below the living wage
6. Median gross weekly earning of full-time workers
 - a) Overview
 - b) Gender
7. Percentage of people living in households in material deprivation
8. Percentage of population aged 16-64 with no qualifications
9. Year 11 and Year 13 school leavers that are not in education, employment or training
 - a) Year 11
 - b) Year 13
10. To what extent do you agree or disagree that Cardiff has a thriving and prosperous economy?
11. Active Enterprises per 10,000 Population
12. Births of New Enterprises per 10,000 Population
 - a) Overview
 - b) Continued
 - c) Net new enterprise creation
13. Number of visitors to Cardiff and expenditure/economic impact per resident
14. How satisfied are you with the quality of public services in Cardiff?
 - a) Overview
 - b) By deprivation fifth
15. Percentage of people attending or participating in arts, culture or heritage activities at least 3 times in a year
16. City centre footfall
17. Funding awarded to arts organisations and individuals (2020-2021)
18. Covid-19 Emergency Funding and Arts Attendance trends
19. Percentage of people participating in sporting activities three or more times a week?
20. Overall numbers of Welsh speakers in Cardiff
21. Percentage of people aged 16+ who can speak Welsh
22. Percentage of people who speak Welsh daily and can speak more than just a few words of Welsh
23. Welsh Language Education in Cardiff
24. Number of people who consider themselves Welsh

1. GVA per head in Cardiff

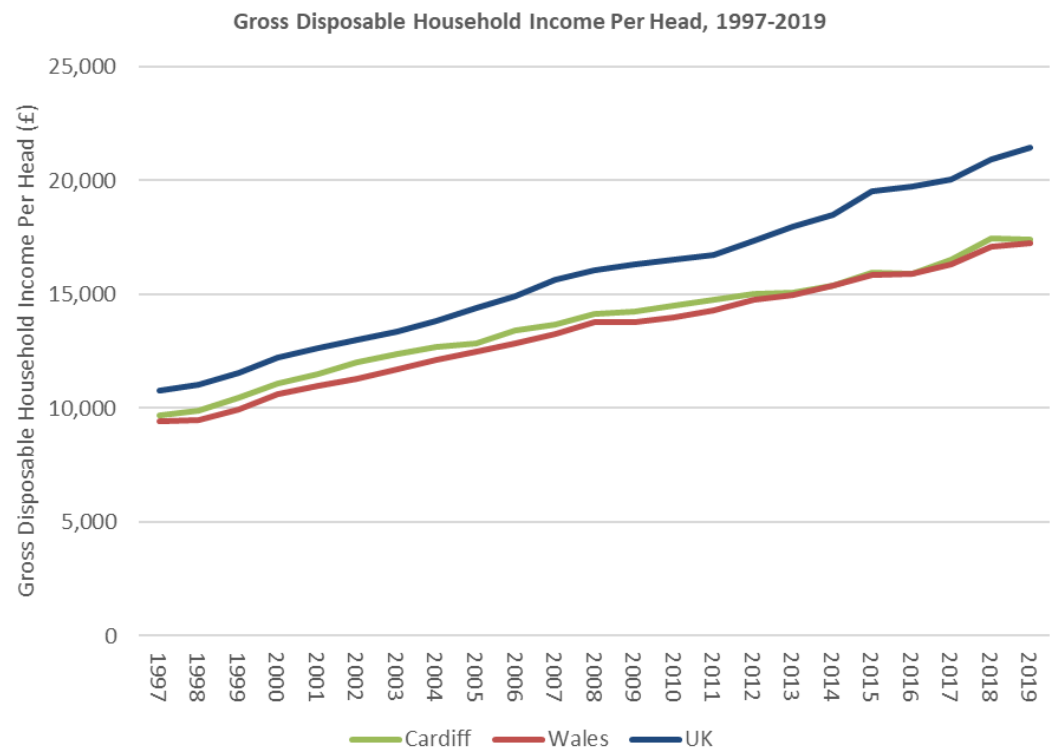
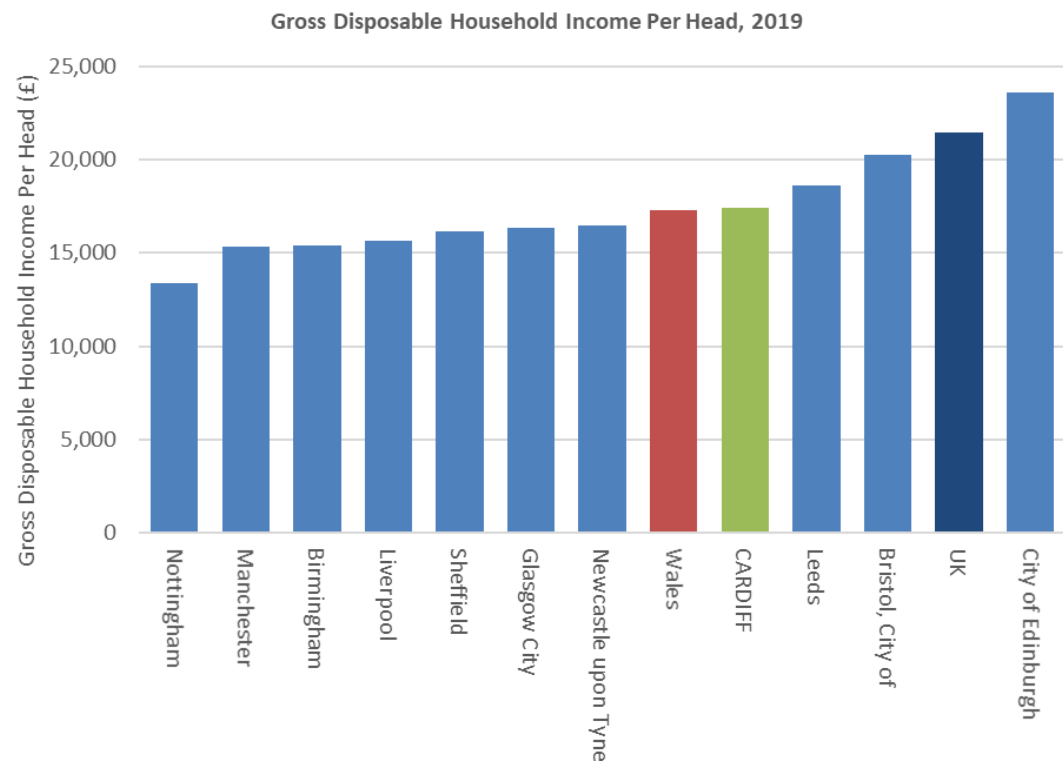
Key Points:

- In 2019, GVA per head in Cardiff stood at £32,333, well above the Welsh average and slightly exceeding the UK average.
- However, the large gap in GVA per head between Cardiff and certain Core Cities, namely Manchester and Edinburgh, reveals that Cardiff needs to make progress in this area.
- Between 2015 and 2019, GVA per head in Cardiff rose by roughly 13% and consistently remained above the Wales and UK averages.



2. Gross Disposable Household Income per head

- Key Points:**
- In 2019, gross disposable household income in Cardiff stood at £17,431, virtually equal to the Welsh average, but significantly lower than the UK average (£21,433) and the level seen in certain Core Cities, namely Bristol and Edinburgh.
 - Between 2016 and 2019, gross disposable household income in Cardiff rose by 9.6%, slightly above the 8.6% increase in the UK average during the same period.
 - Over the last 20 years, gross disposable income in Cardiff has been on a general increasing trajectory, however the rate of increase has decelerated slightly since 2008-09, coinciding with the global financial crisis.

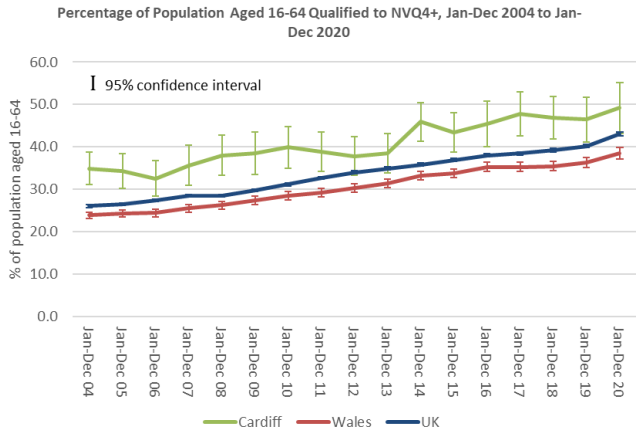
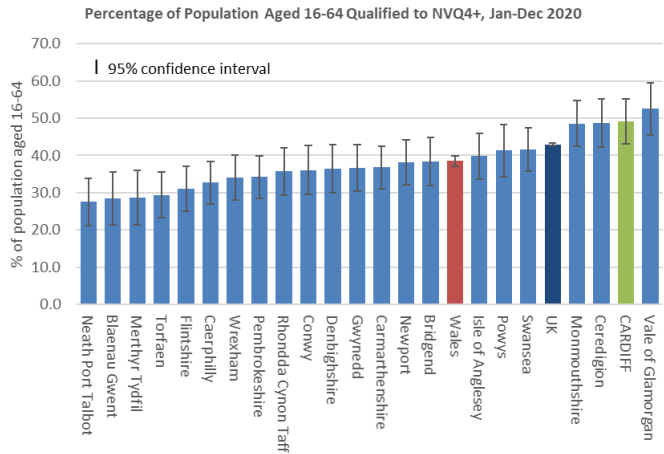
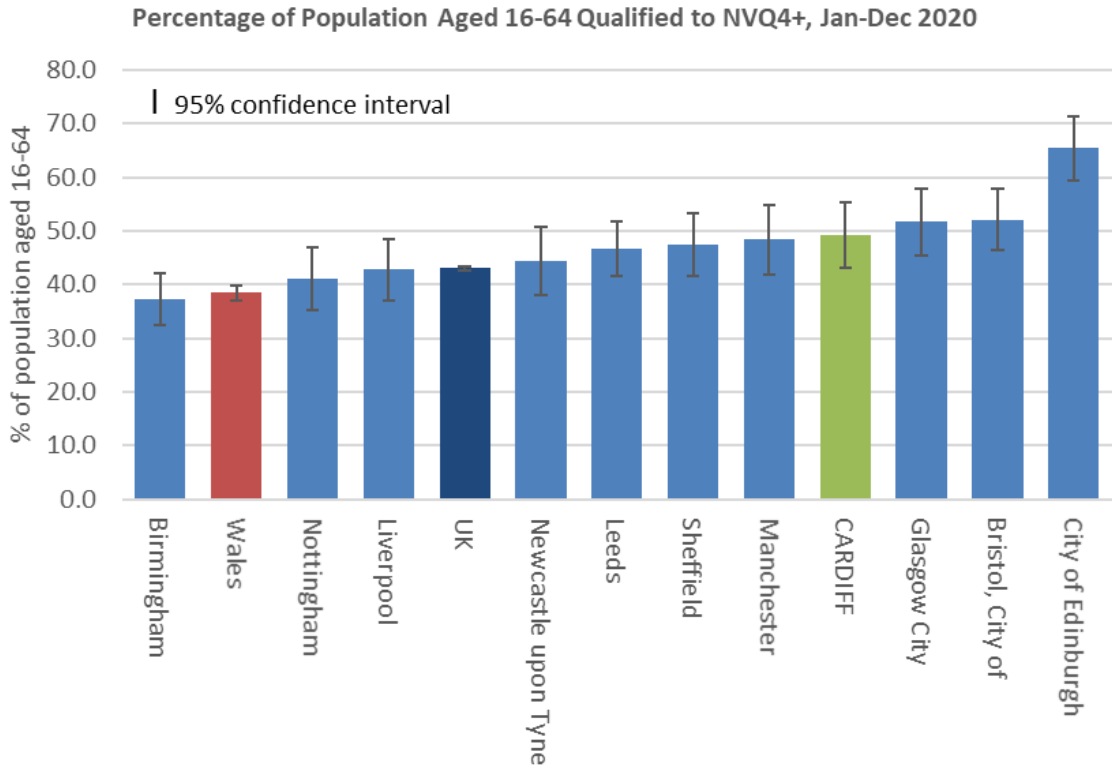


Source: ONS

3. Percentage of population aged 16-64 qualified to NVQ4+ (degree level or equivalent)

Key Points:

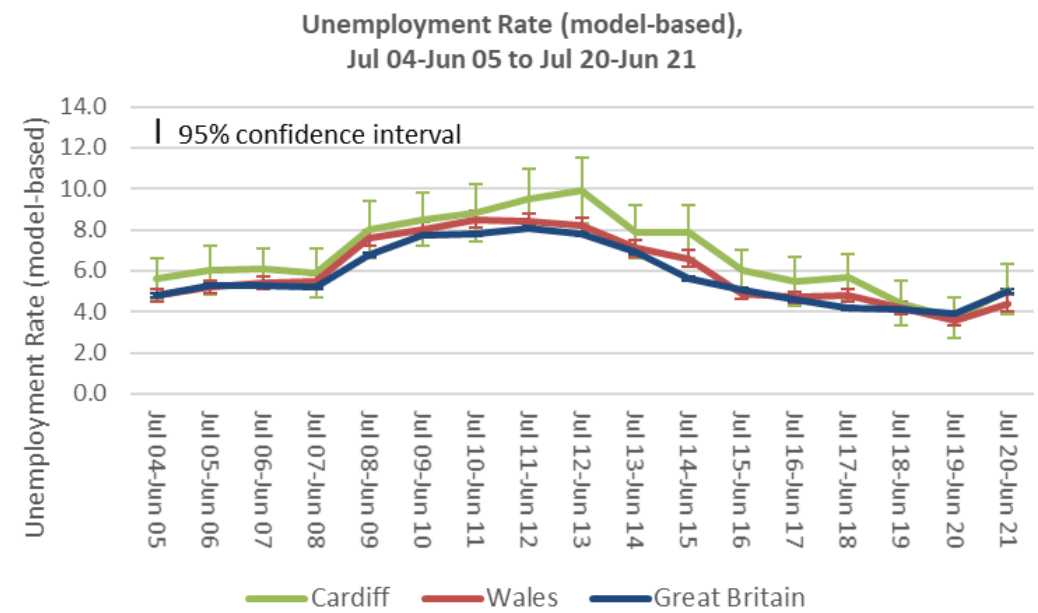
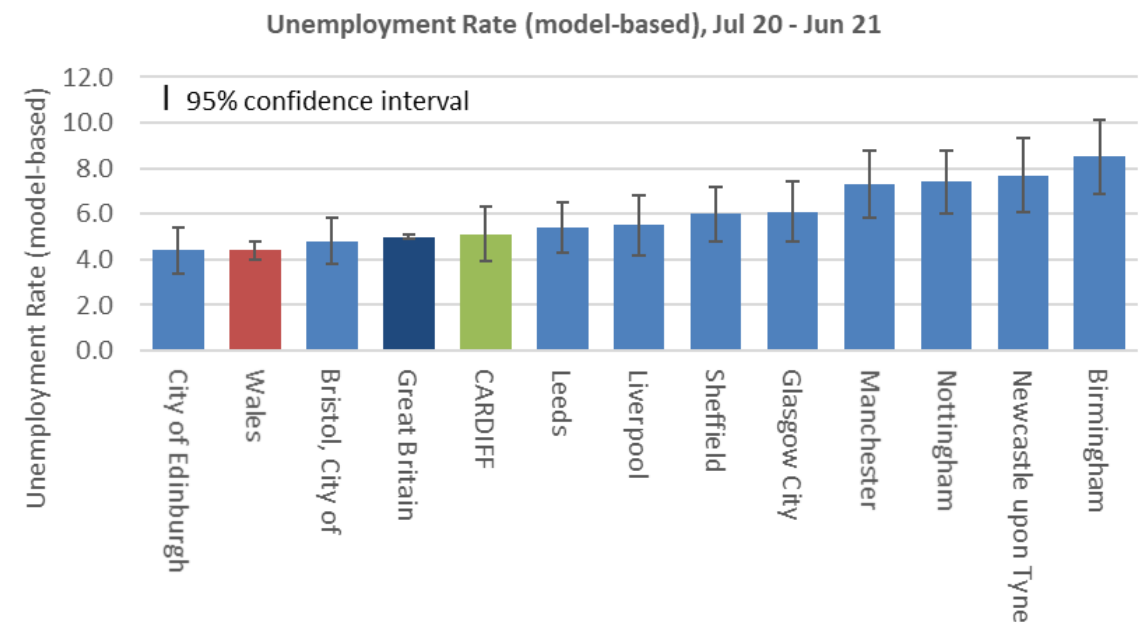
- In 2020, the percentage of Cardiff's adult population qualified to degree level or equivalent stood at just below 50%, comfortably above the Welsh and UK averages, and above the majority of other Core Cities.
- Between 2016 and 2020, this percentage was on a broadly increasing trajectory in Cardiff.
- Since 2004, the percentage of people qualified to degree level in Cardiff has remained consistently above the Wales and UK averages.



4. Unemployment rate of the economically active population age 16+

Key Points:

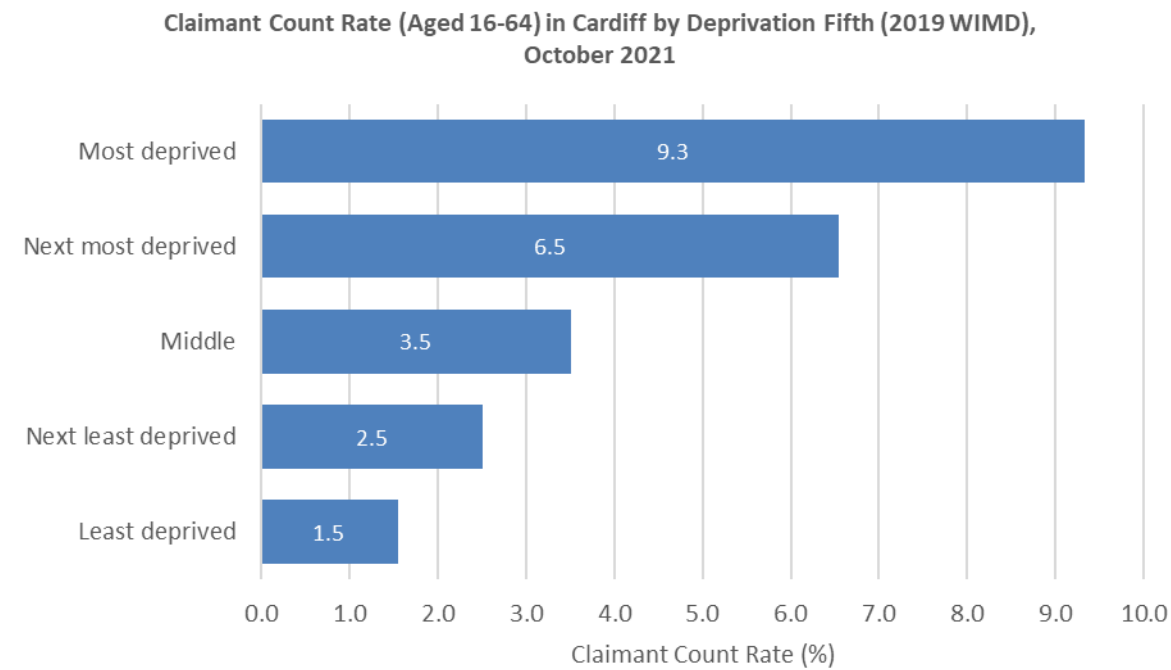
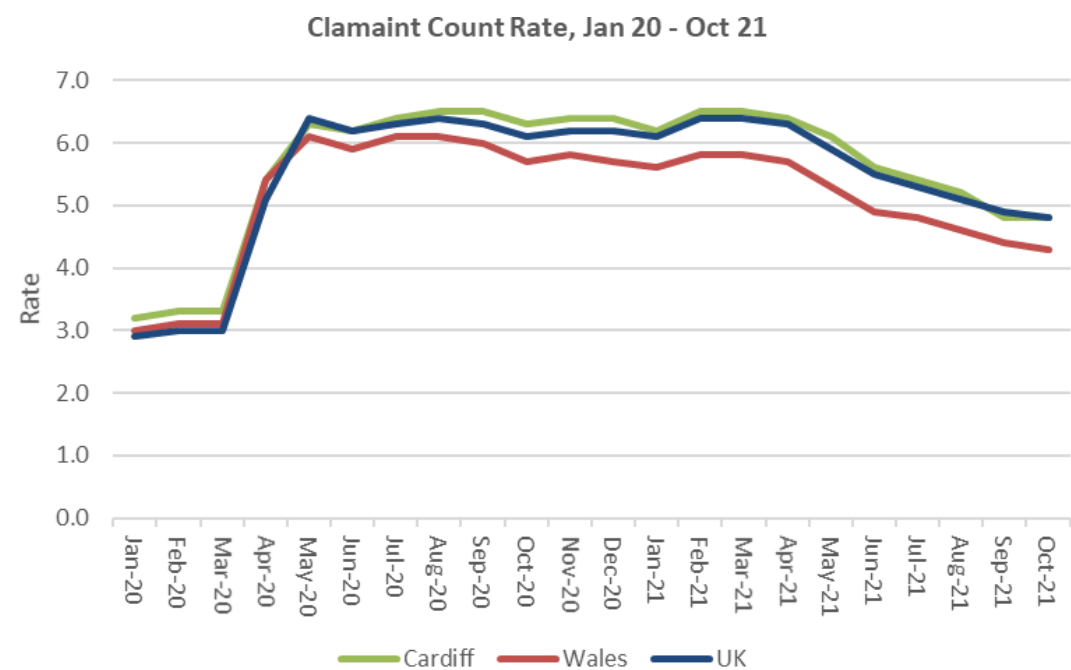
- The unemployment rate in Cardiff for the year ending June 2021 was the third lowest out of the UK's Core Cities (5.1%). However, the rate was above the Wales average and second only to Newport. It was also just above the Great Britain average.
- Since reaching a high of 9.9% for the year ending June 2013, unemployment in Cardiff has seen a general downward trend with the rise in 2021 most likely relating to the impact of Covid-19.
- Since the last Well-being assessment, unemployment has fallen from 6.0% (year ending June 2016) to 5.1%.



Source: Model-based Unemployment, Annual Population Survey

4a. Unemployment rate of the economically active population age 16+ (claimant count rate/deprivation fifth)

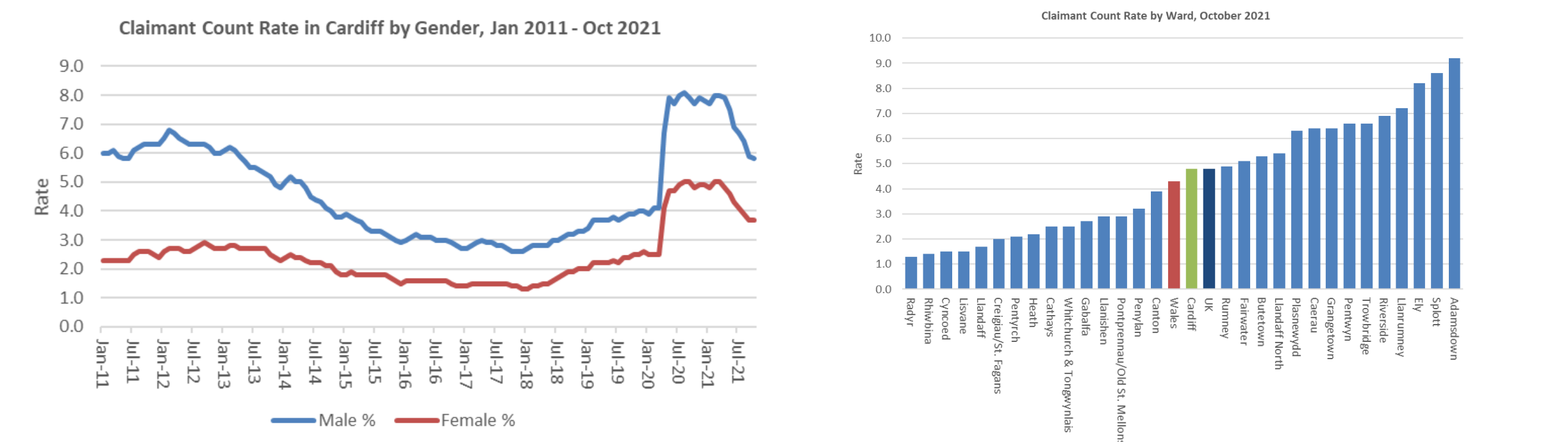
- Key Points:**
 - The pandemic’s impact on unemployment caused the claimant count rate in Cardiff to double in the spring of 2020, although this figure has been on a downward trajectory since May 2021 and now matches the UK average. However, it remains above the pre-pandemic level.
 - Unemployment is not felt evenly across the city, with claimant count rate being 7.8 percentage points higher for the most deprived fifth of the population compared to the least deprived fifth.



Source: Claimant Count/Welsh Index of Multiple Deprivation 2019, Welsh Government/Mid-2020 Population Estimates, ONS

4b. Unemployment rate of the economically active population age 16+ (claimant count/gender and ward)

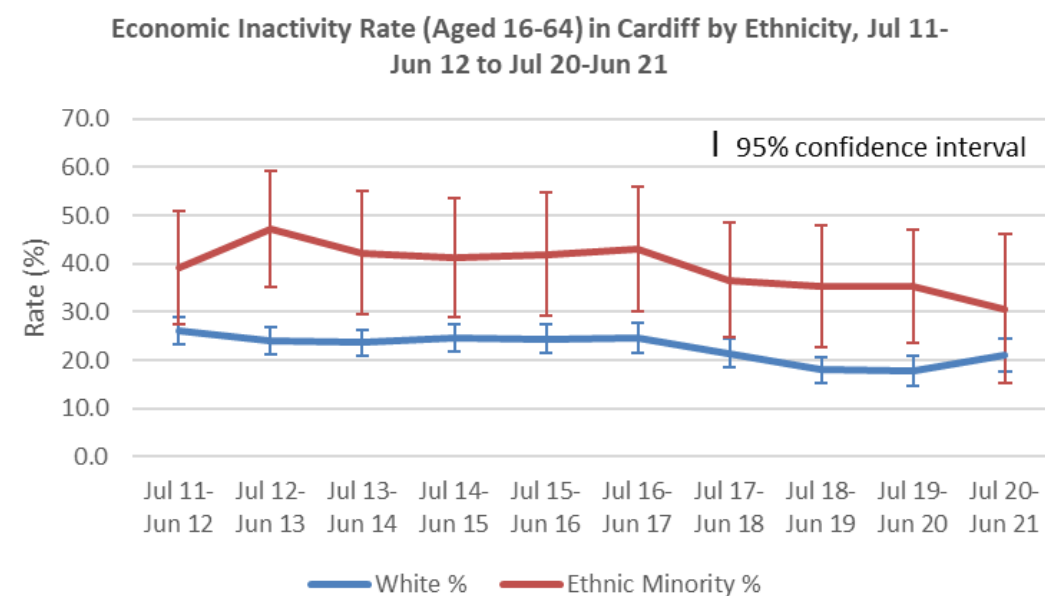
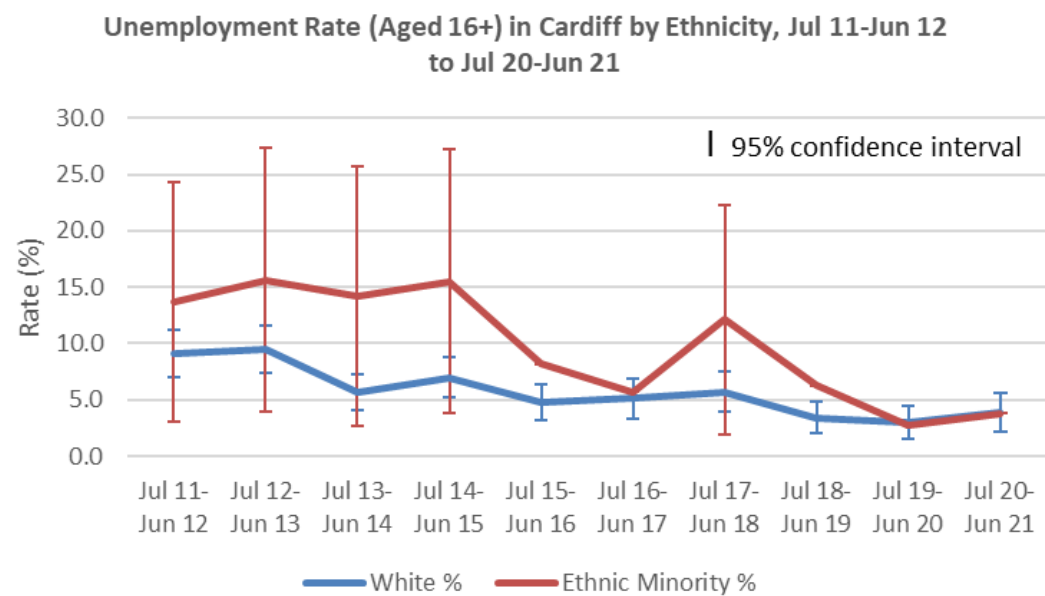
- Key Points:**
- The claimant count rate for men in Cardiff has been consistently and significantly higher than the rate for women over the past decade although this gap had started to narrow from 2012 until the onset of the pandemic, which accounts for the sharp spikes in early 2020.
 - At the time of the last well-being assessment in July 2016, the male and female rate was separated by 1.4 percentage points (3.0% v 1.6%); the latest data from October 2021 reveals this gap is now 2.1 percentage points (5.8% v 3.7%).
 - In October 2021, the claimant count rate in Adamsdown, the Cardiff ward with the highest rate, is roughly 7 times higher than in Radyr, the ward with the lowest rate (9.2% v 1.3%), revealing a persistent problem with spatial inequality in Cardiff.



Source: Claimant Count ONS

4c. Unemployment rate of the economically active population age 16+ (ethnicity)

- Key Points:**
 - The difference in the unemployment rate for ethnic minority and white residents has fluctuated over time but was very similar for the year July 2020 to June 2021. [NB. Ethnic minority rates are unreliable for much of the period due to low sample sizes and so caution should be taken when using these figures]
 - There is a large disparity in the economic inactivity rates of Cardiff’s ethnic minority and white residents, with the ethnic minority population being much more likely to be inactive than their white counterparts. [NB. Ethnic minority figures are subject to large confidence intervals but the difference between the rates is significant for the majority of the period covered]



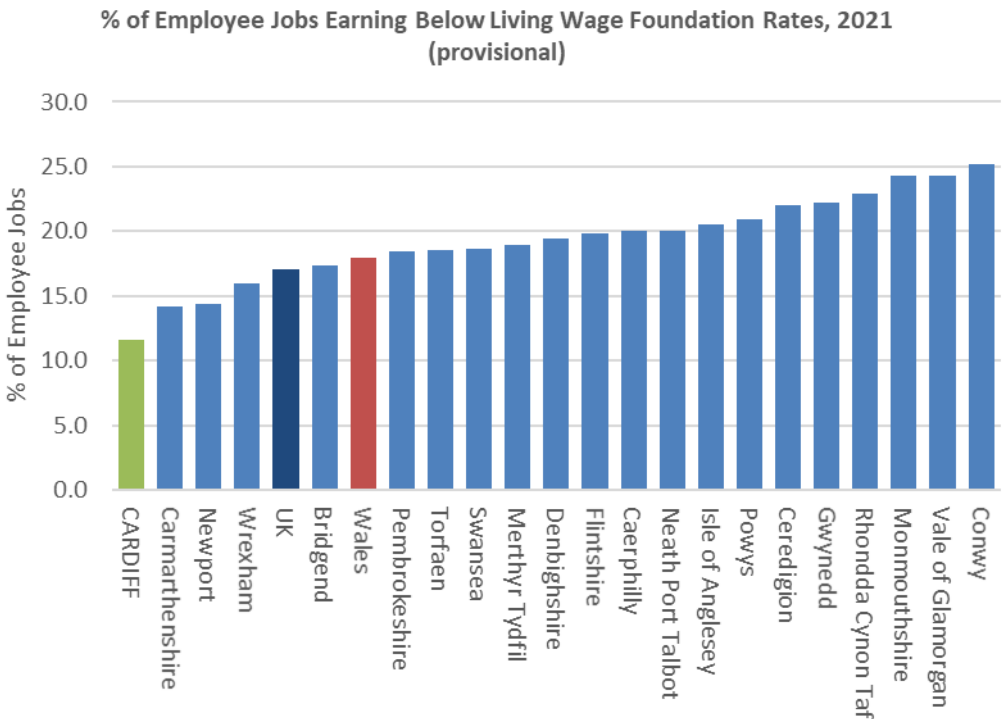
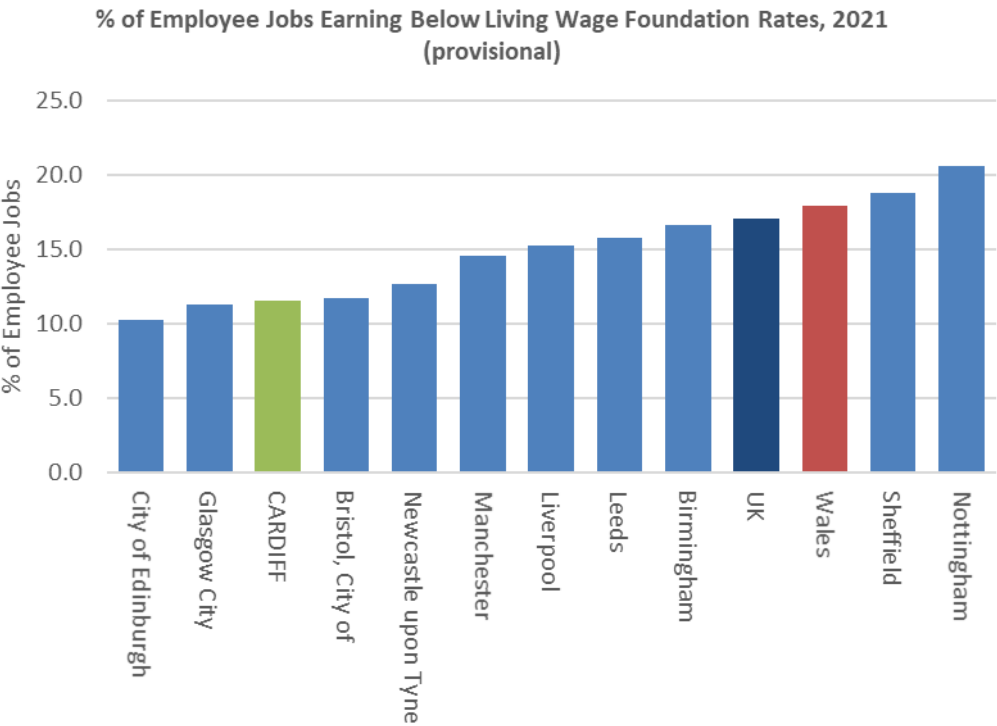
Source: Annual Population Survey

5. Percentage of employee jobs with hourly pay below the living wage

Key Points:

- Provisional results for 2021 show that the percentage of employee jobs with hourly pay below the living wage stood at 11.6%.
- This percentage is significantly below the UK and Wales averages, as well as the majority of other Core Cities and all other local authorities in Wales.
- Between 2020 and 2021, the percentage of employee jobs with hourly pay below the living wage decreased by 2.7 percentage points (14.3% vs 11.6%)
- This data reflects the success of Cardiff’s Real Living Wage movement.

NB: Data based on number and proportion of UK employees earning below the living wage as defined by the Living Wage Foundation

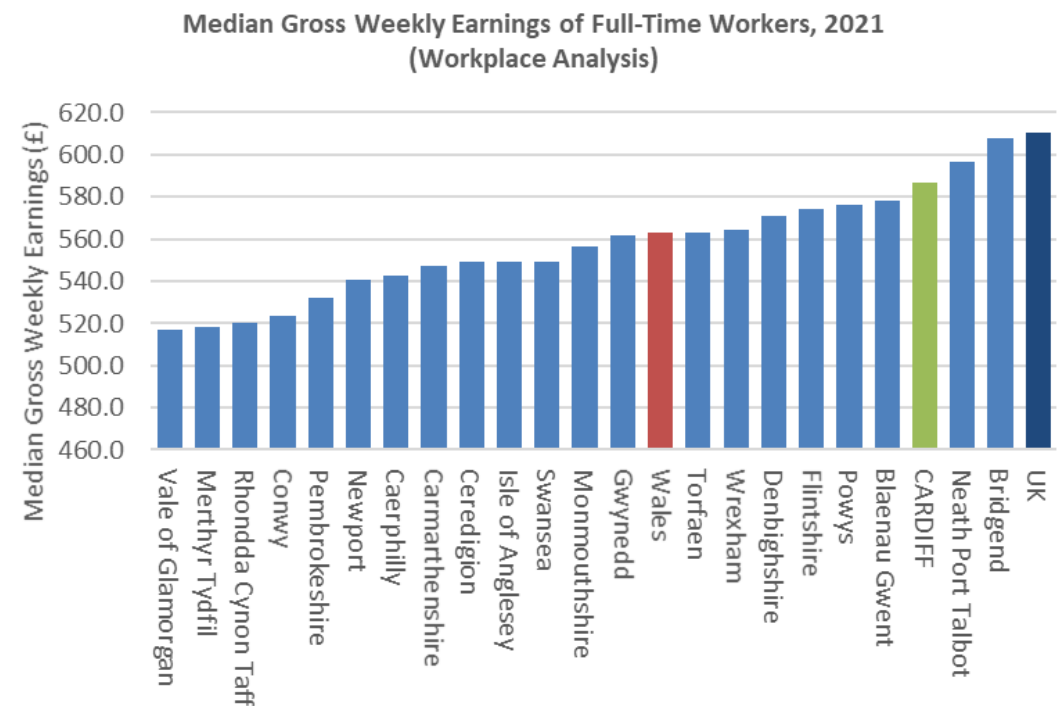
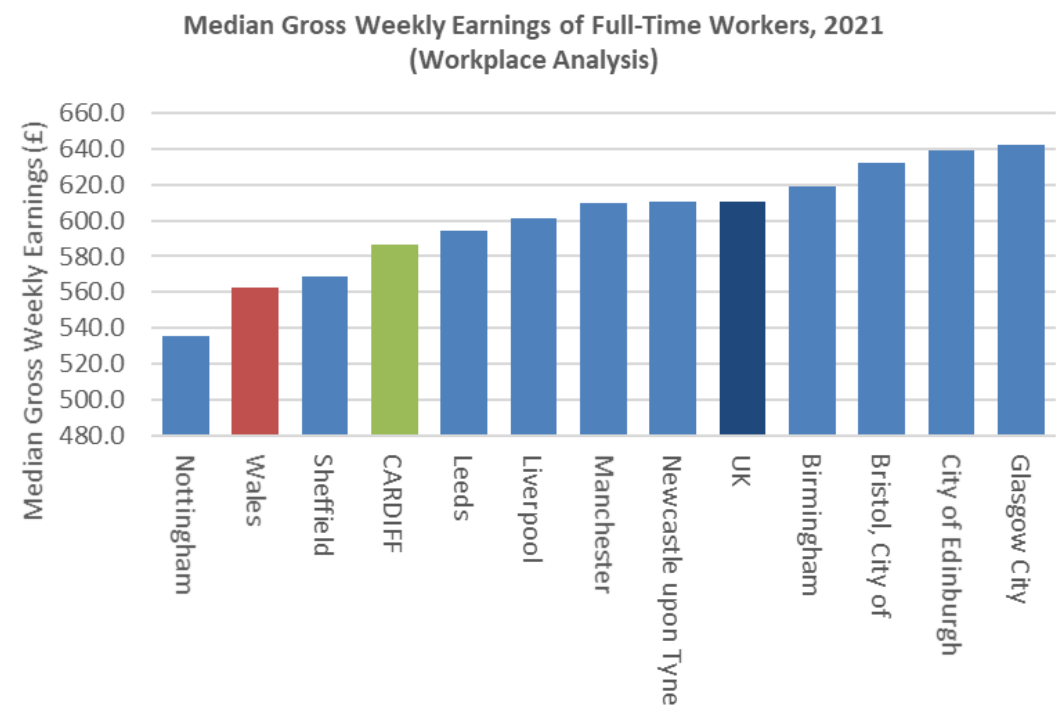


Source: ONS (User-requested data)

6a. Median gross weekly earning of full-time workers

Key Points:

- In 2021, median gross weekly earnings of full-time workers in Cardiff stood at £586.70, the 3rd highest of Welsh Local Authorities, yet falling short of the UK average and nearly all other Core Cities.
- Between 2016 and 2021, median gross weekly earnings in Cardiff increased by 10%, below the rates of increase seen across both Wales (14%) and the UK (13%).

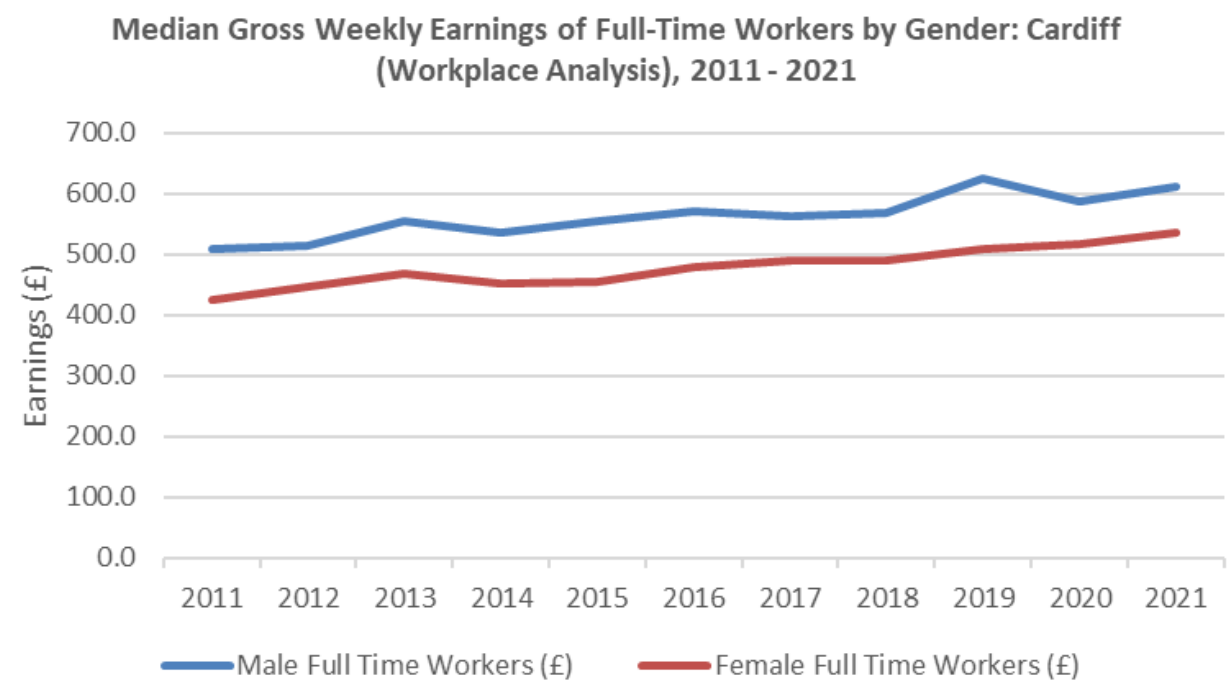


Source: Annual Survey of Hours and Earnings (Workplace Analysis)
NB. 2021 figures are provisional

6b. Median gross weekly earning of full-time workers (by gender)

Key Points:

- In 2021, median gross weekly earnings of women working in Cardiff stood at 87.5% of men's weekly, compared to 83.7% in 2016.
- While this gap remains a major problem, it closed by 3.8 percentage points between 2016 and 2021.
- The narrowing of the divide from 2019 to 2020 came as the result of a drop in men's earnings rather than a significant rise in women's earnings.

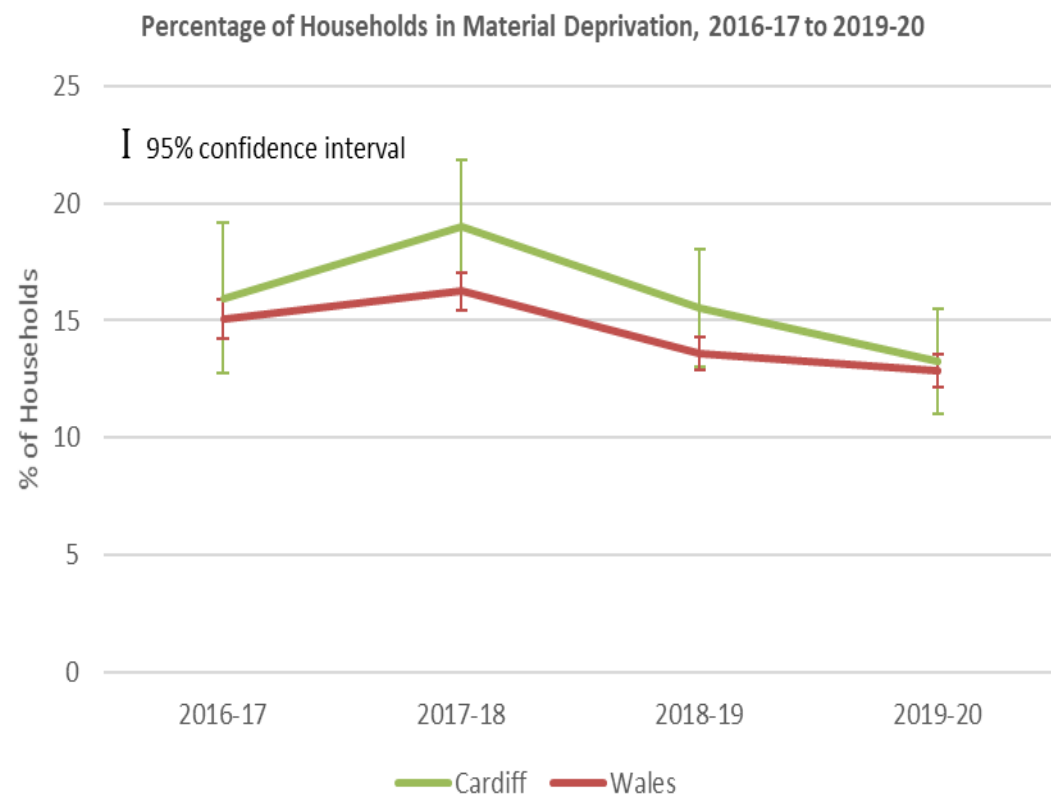
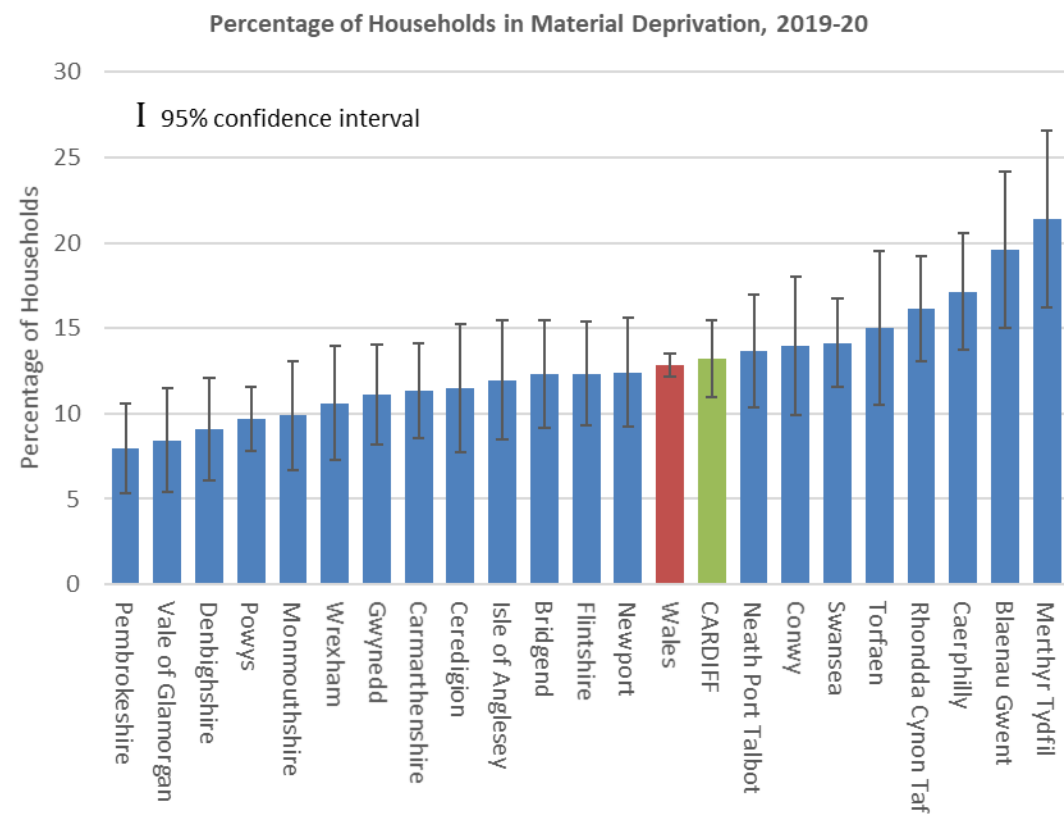


Source: Annual Survey of Hours and Earnings (Workplace Analysis)
NB. 2021 figures are provisional

7. Percentage of people living in households in material deprivation

Key Points:

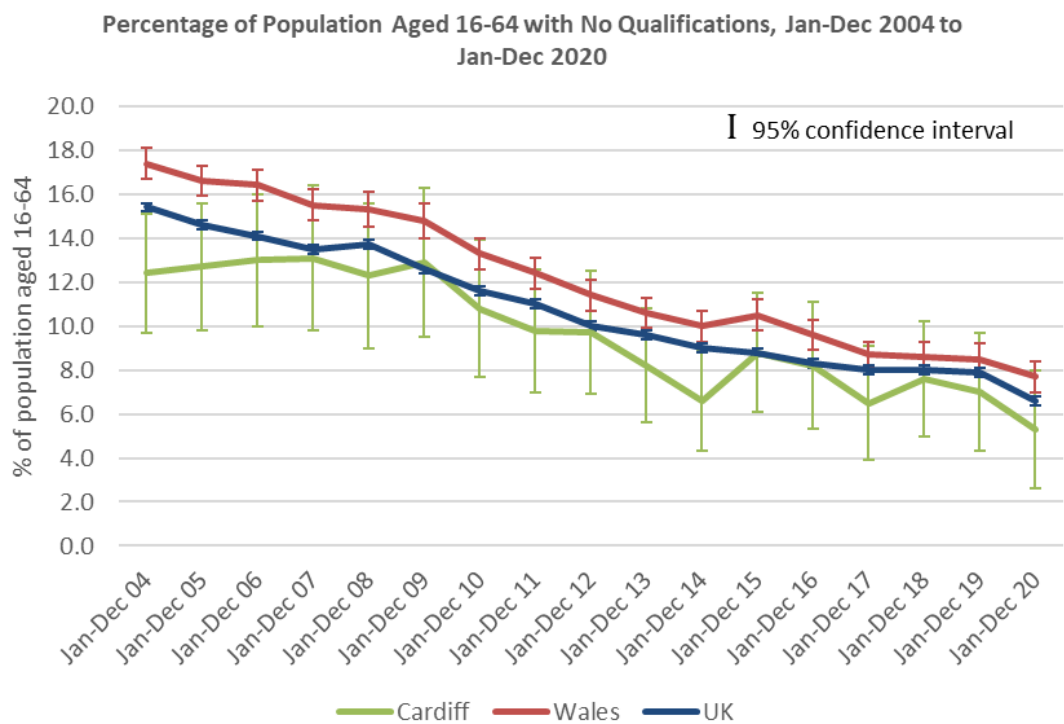
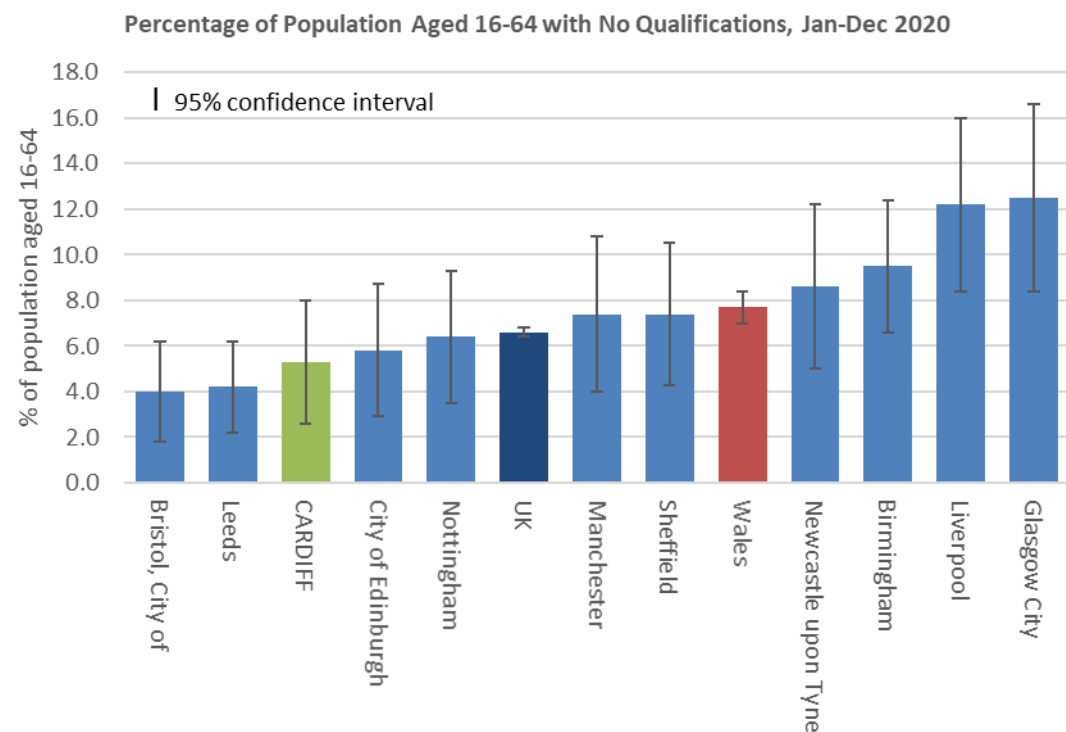
- The percentage of households in Cardiff living in material deprivation sits at 13%, equal to the Welsh average.
- Despite an increase to 19% in 2017/18, this figure has fallen from 16% to 13% between 2016-17 and 2019-20.
- *NB. 2020-21 figures are unavailable due to the pandemic impact on the National Survey*



8. Percentage of population aged 16-64 with no qualifications

Key Points:

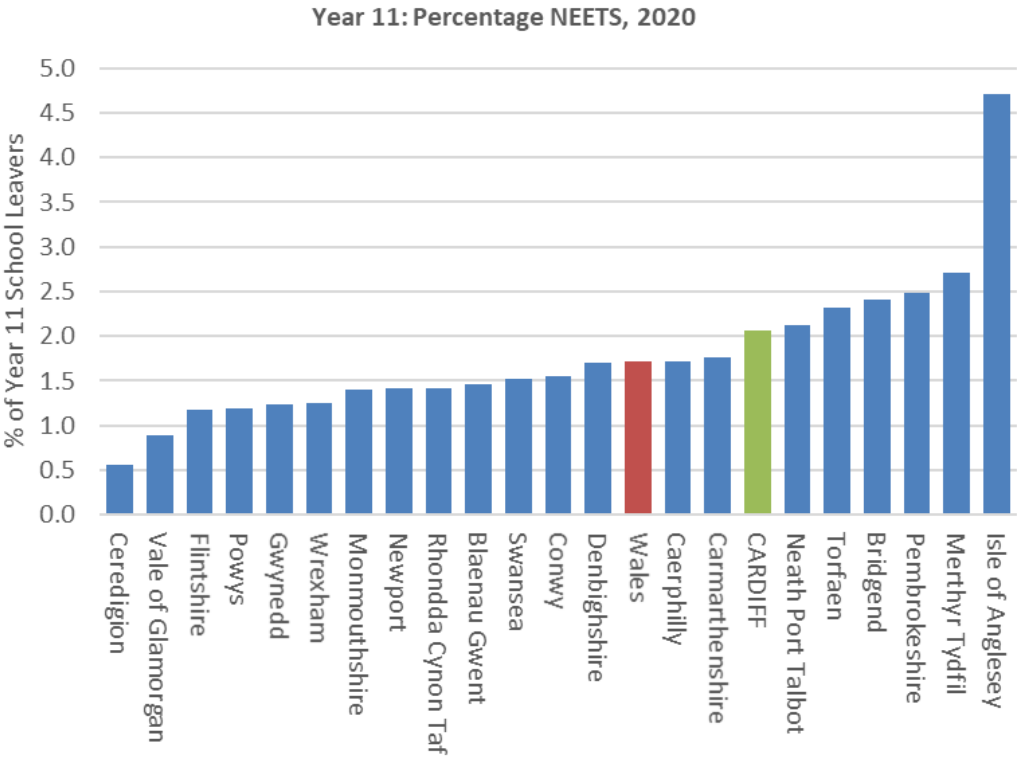
- In 2020, the percentage of Cardiff's adult population with no qualifications stood at just over 5%, below the Welsh and UK averages, as well as the rates seen in most other Core Cities.
- Cardiff has seen a downward trend since 2009. The percentage has come down from 12.9% in 2009 to 5.3% in 2020.



Source: Annual Population Survey

9a. Year 11 school leavers known not to be in Education, Employment or Training (NEET)

- Key Points:**
 - Data no longer comparable to previous years.
 - The percentage of Year 11 school leavers known to be NEET in Cardiff is just above the Wales average.

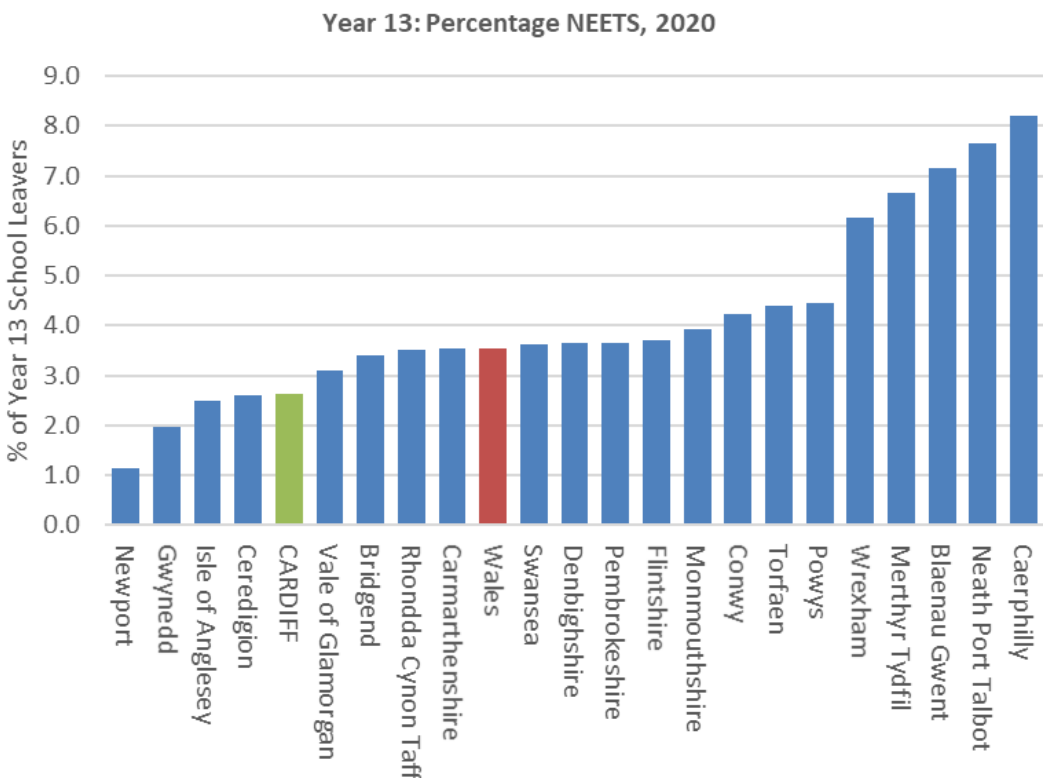


Source: Careers Wales

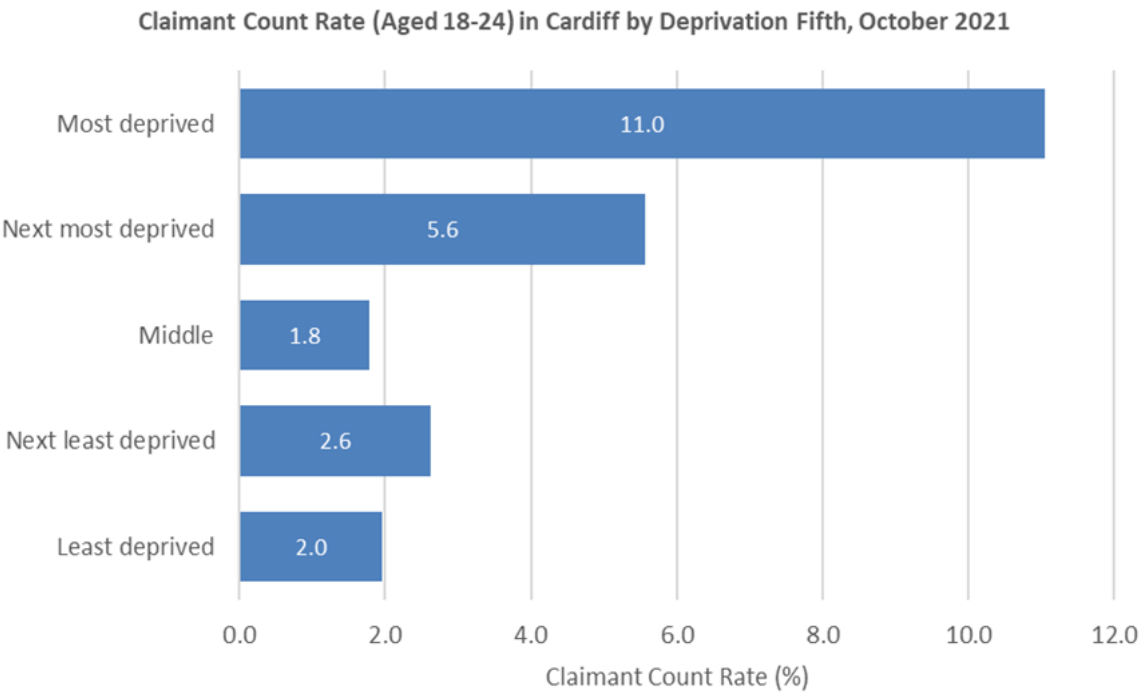
9b. Year 13 school leavers known not to be in Education, Employment or Training (NEET)

Key Points:

- 2020 data no longer comparable to previous years.
- The percentage of Year 13 school leavers known to be NEET is below the Wales average and the joint-4th lowest percentage among Welsh Local Authorities.
- In 2021, the Claimant Count Rate (aged 18-24) in the most deprived communities is over five times that of the least deprived.



Source: Careers Wales

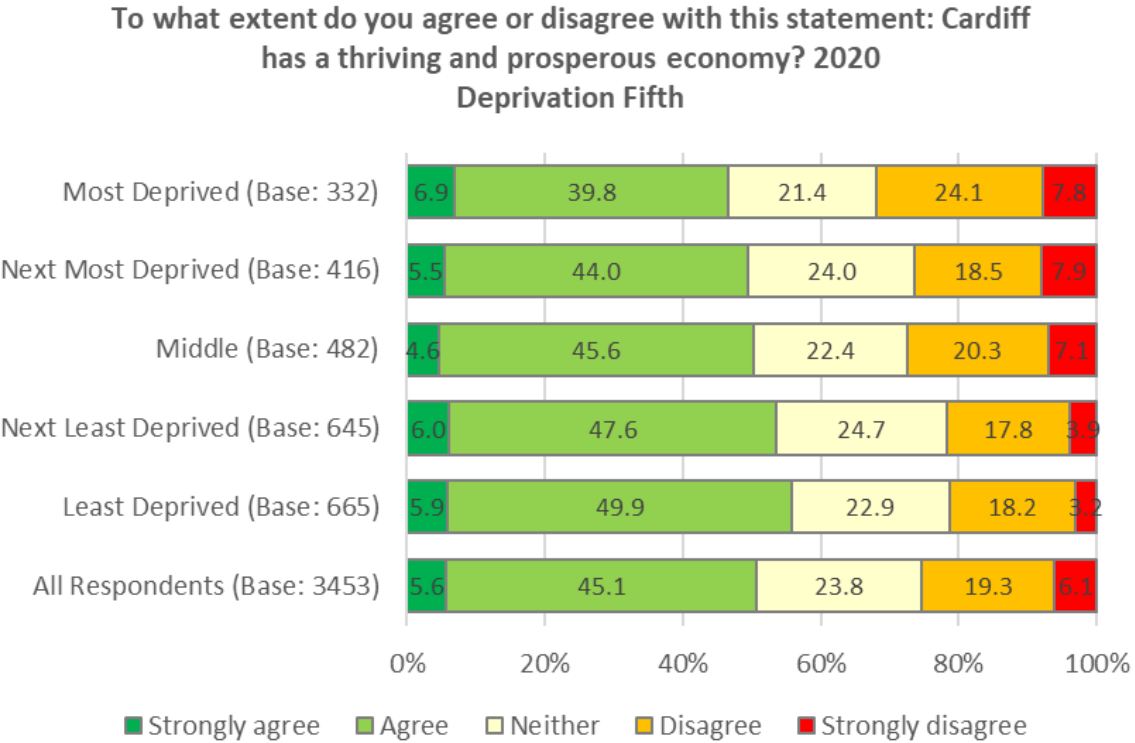
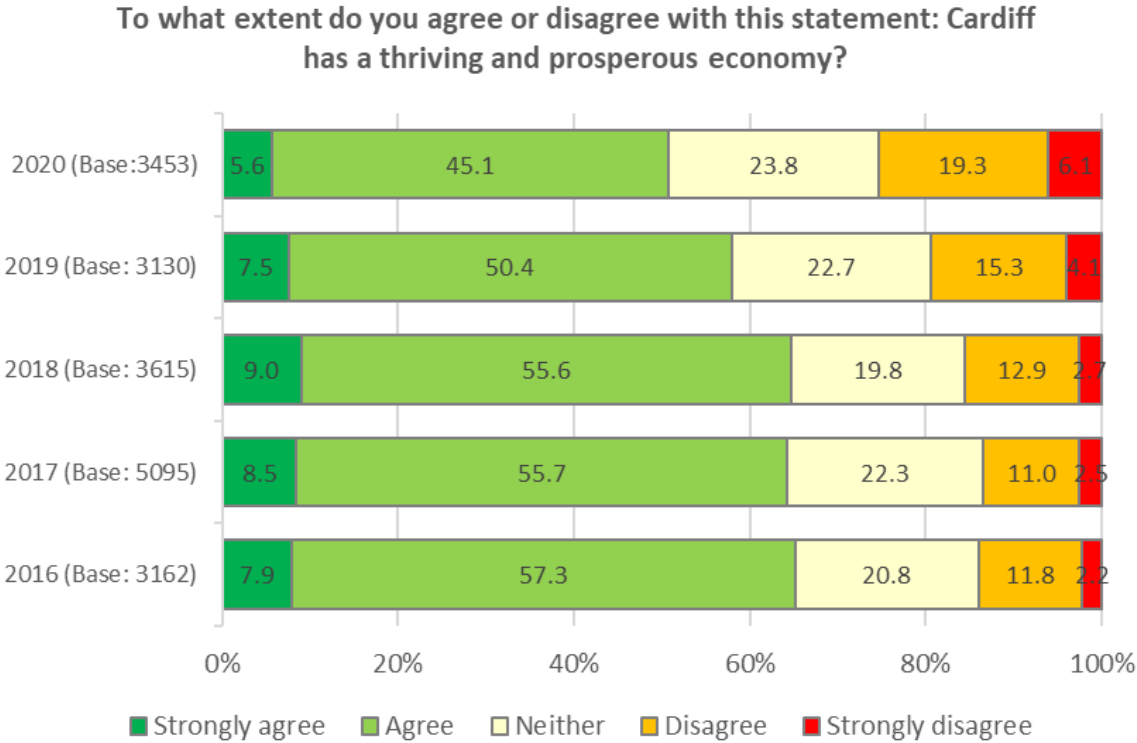


Source: NOMIS – Office of National Statistics

10. To what extent do you agree or disagree that Cardiff has a thriving and prosperous economy?

Key Points:

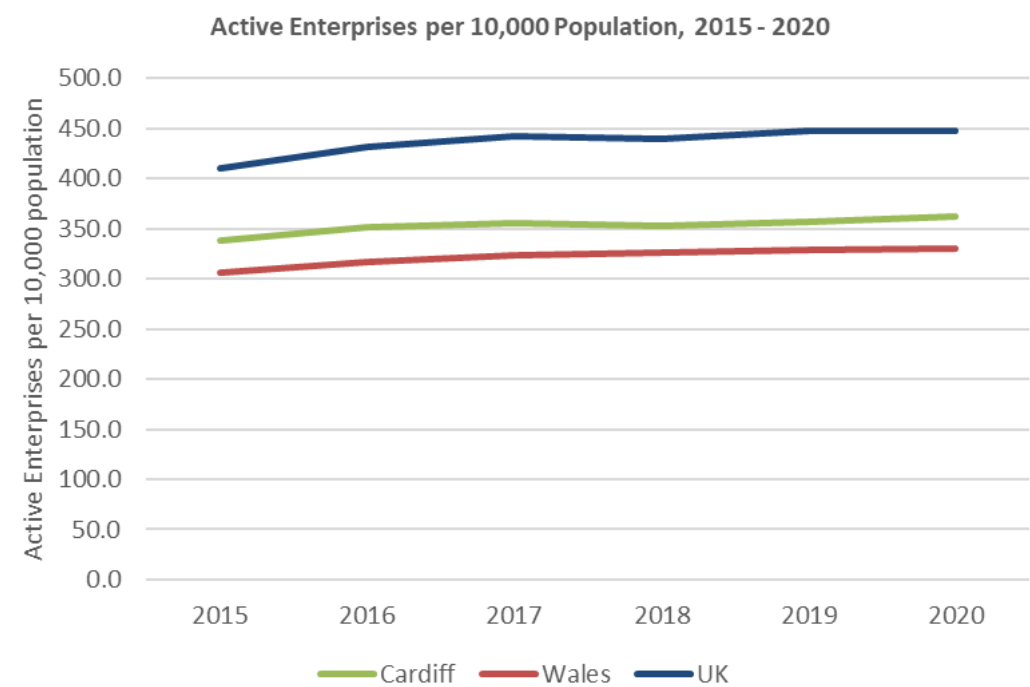
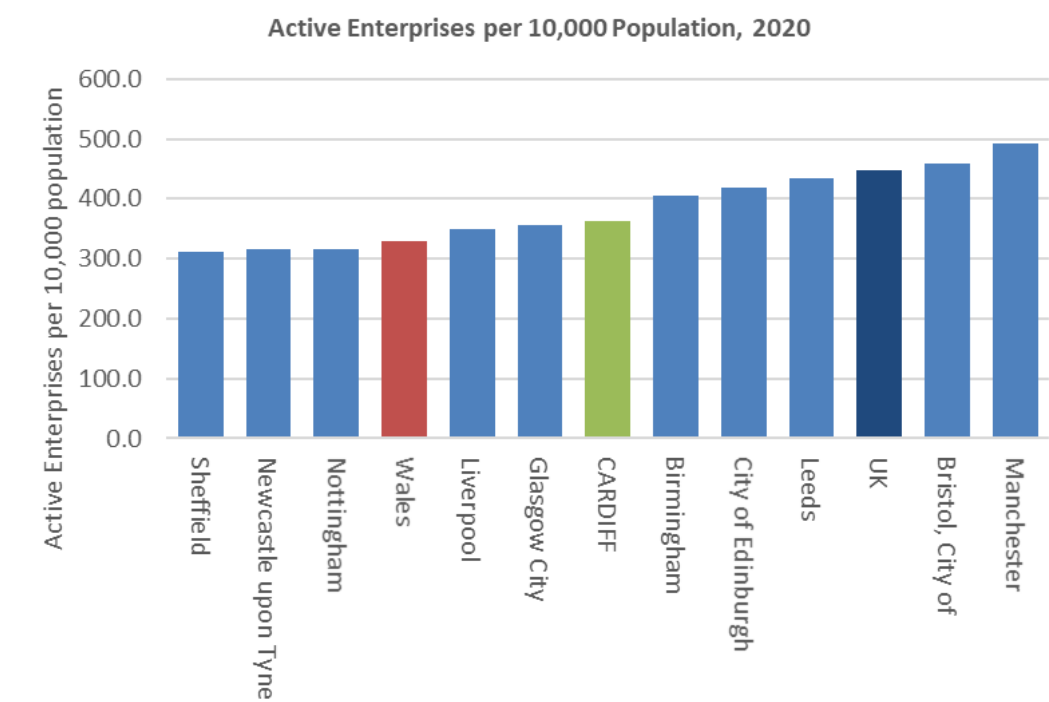
- In 2020, just over 50% of surveyed residents agreed or strongly agreed that Cardiff has a thriving and prosperous economy, representing a significant decrease of roughly 15 percentage points relative to 2016.
- The most deprived fifth of the population is least inclined to agree that Cardiff has a thriving and prosperous economy, and there is a significant gap of almost 10 percentage points between the most and least deprived fifths.



11. Active Enterprises per 10,000 Population

Key Points:

- In 2020, Cardiff had 362.4 active enterprises per 10,000 population, or a total of 13,380 businesses.
- Cardiff exceeds the Welsh average but falls well short of the UK average and that of key competitor Core Cities, namely Bristol and Manchester.
- Between 2015 and 2020, this rate remained broadly stable, with small year-on-year increases for the majority of the period.

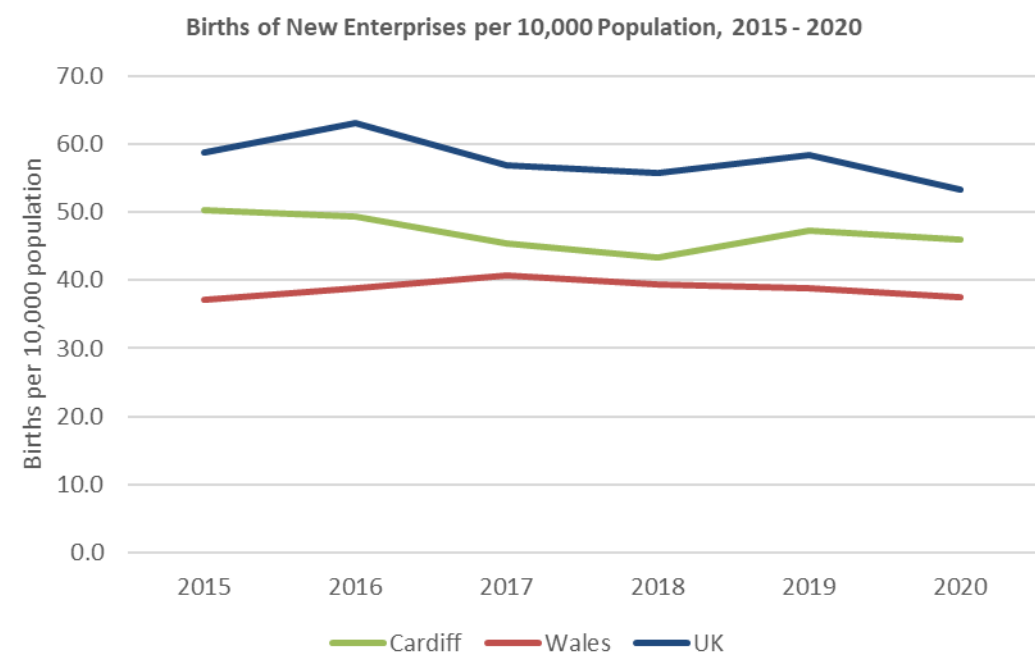
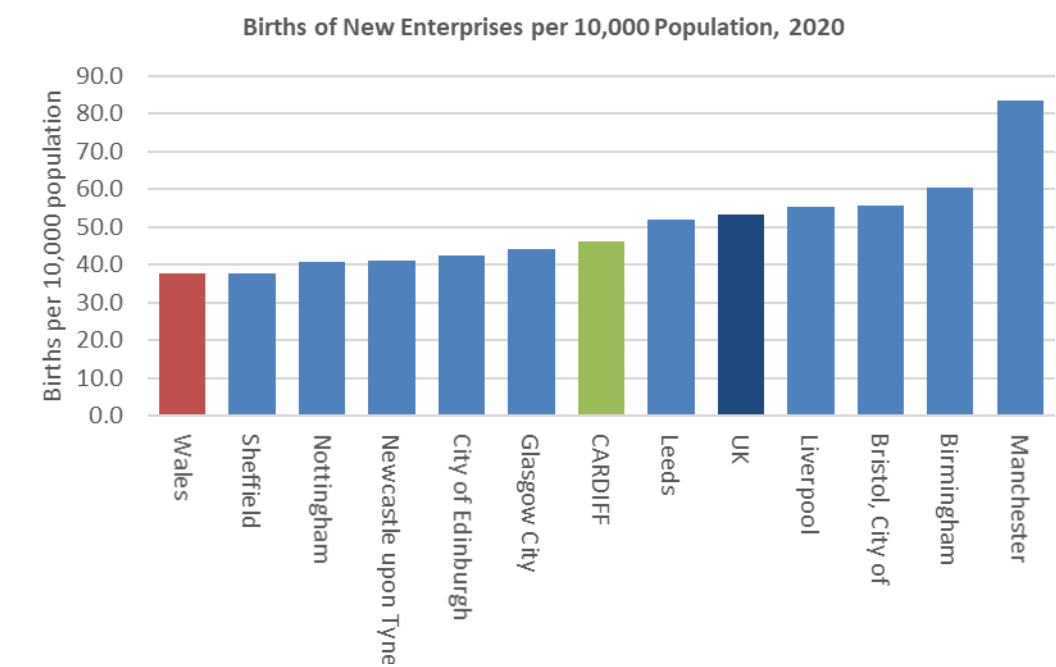


Source: Business Demography, ONS/Mid-Year Population Estimates

12a. Births of New Enterprises per 10,000 Population

Key Points:

- In 2020, 46.0 new enterprises per 10,000 population were created in Cardiff, amounting to 1,700 businesses.
- This rate exceeds the Welsh average, but sits well below the UK average and is mid-ranked amongst Core Cities; the size of the gap between Cardiff and Bristol, Birmingham and Manchester reveals that there is much room for improvement in this area.
- Between 2015 and 2018, the rate of new enterprises in Cardiff was on a downward trajectory. The figure rose by roughly 10% from 2018 to 2019 (1,580 vs 1,735) but fell again in 2020 and, at the end of the period, the rate was below that seen at the time of the last Well-being Assessment (in 2016).

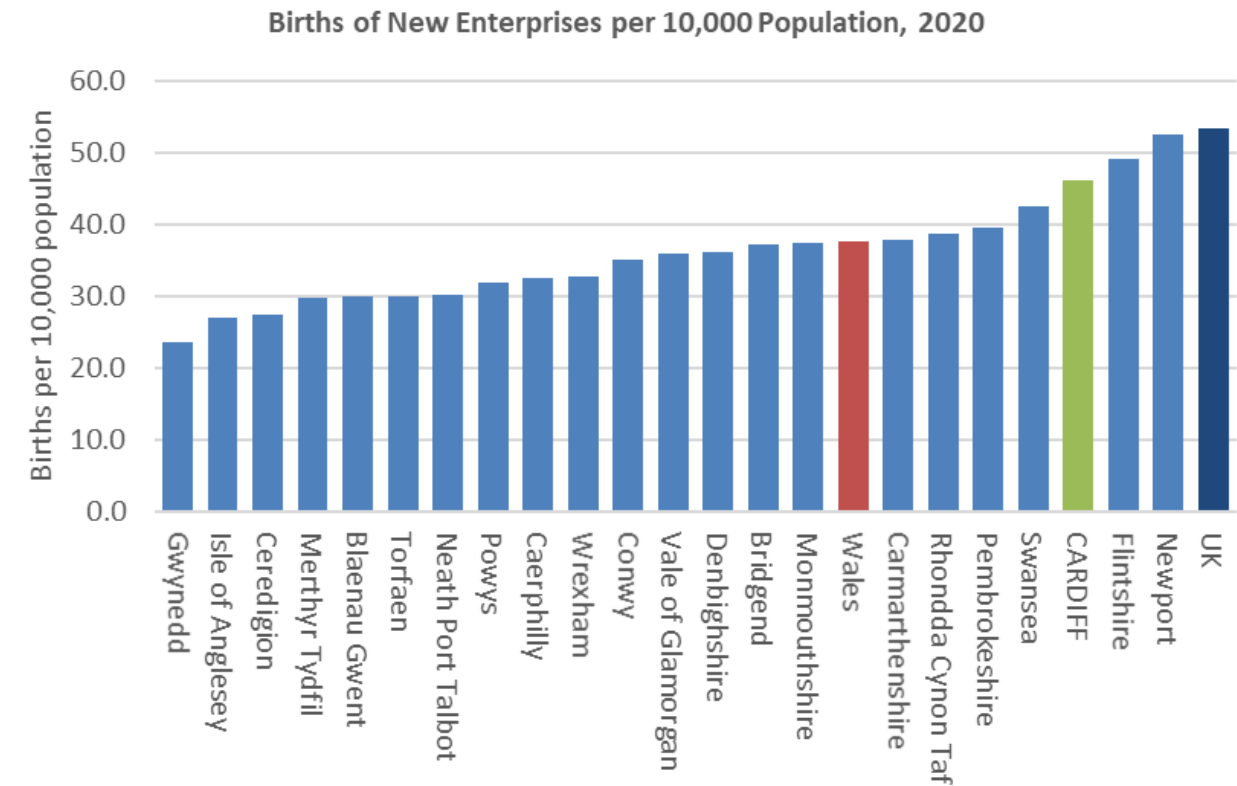


Source: Business Demography, ONS/Mid-Year Population Estimates

12b. Births of new Enterprises per 10,000 Population (cont'd)

Key Points:.

- In 2020, Cardiff placed third in Wales for new enterprise creation relative to population, notably finishing behind Newport and Flintshire.

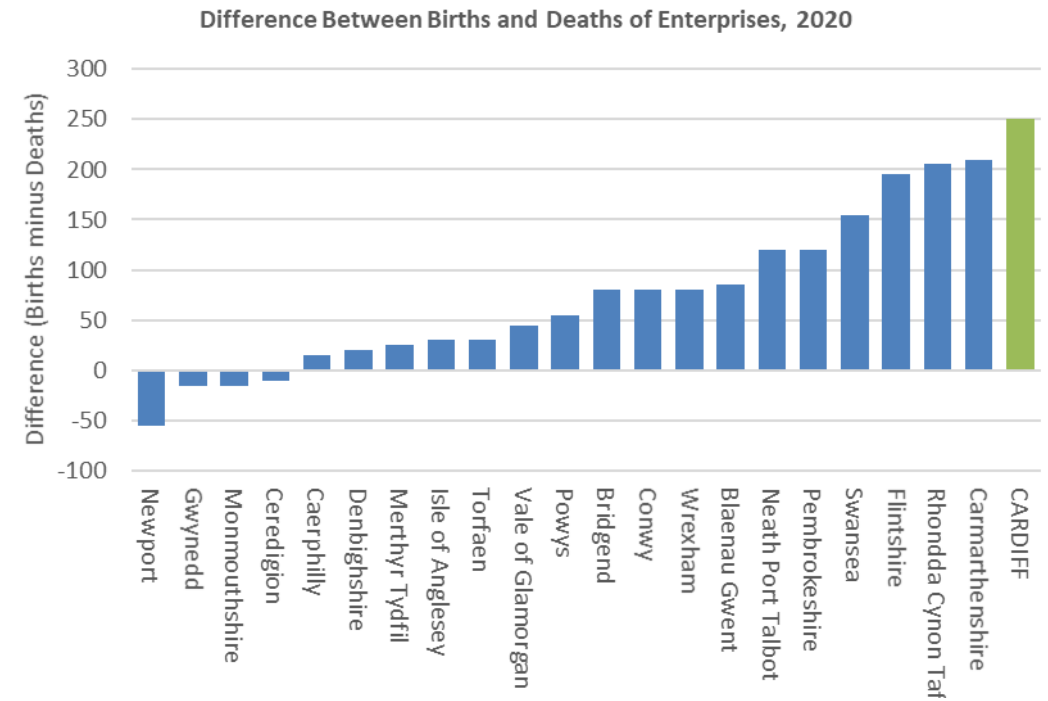
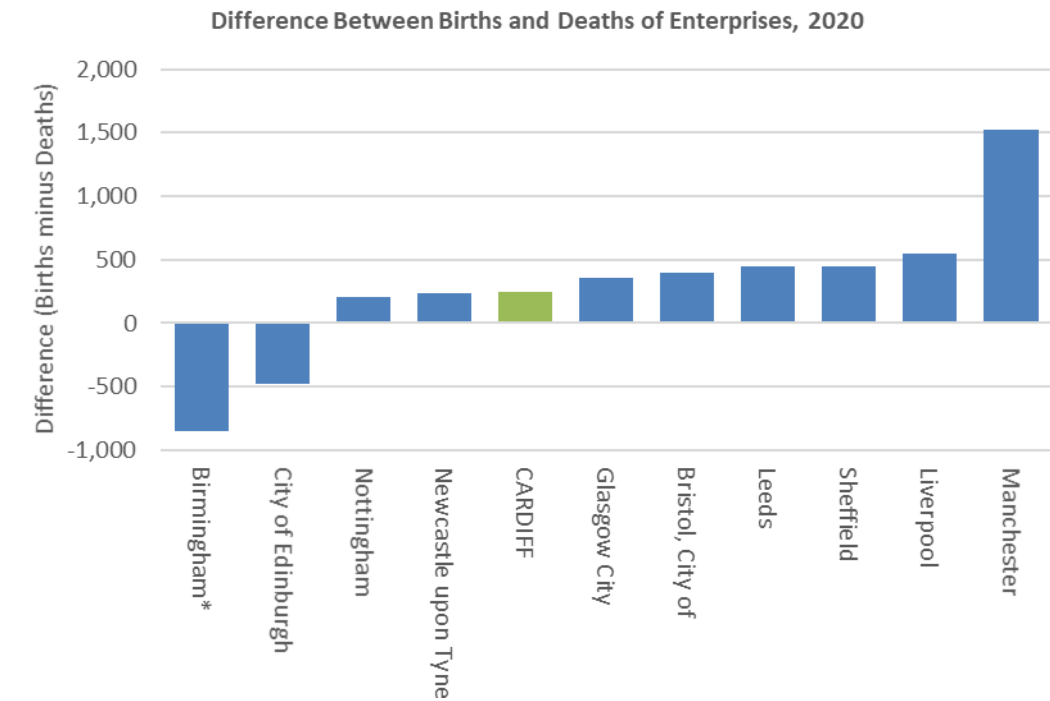


Source: Business Demography, ONS/Mid-Year Population Estimates

12c. Births of new Enterprises per 10,000 Population (net new enterprise creation)

Key Points:.

- In 2020, Cardiff placed seventh out of the Core Cities in net new enterprise creation (births minus deaths), falling significantly behind key competitor cities such as Bristol and Manchester.
- In 2020, Cardiff was the top performing Welsh Local Authority in net new enterprise creation.

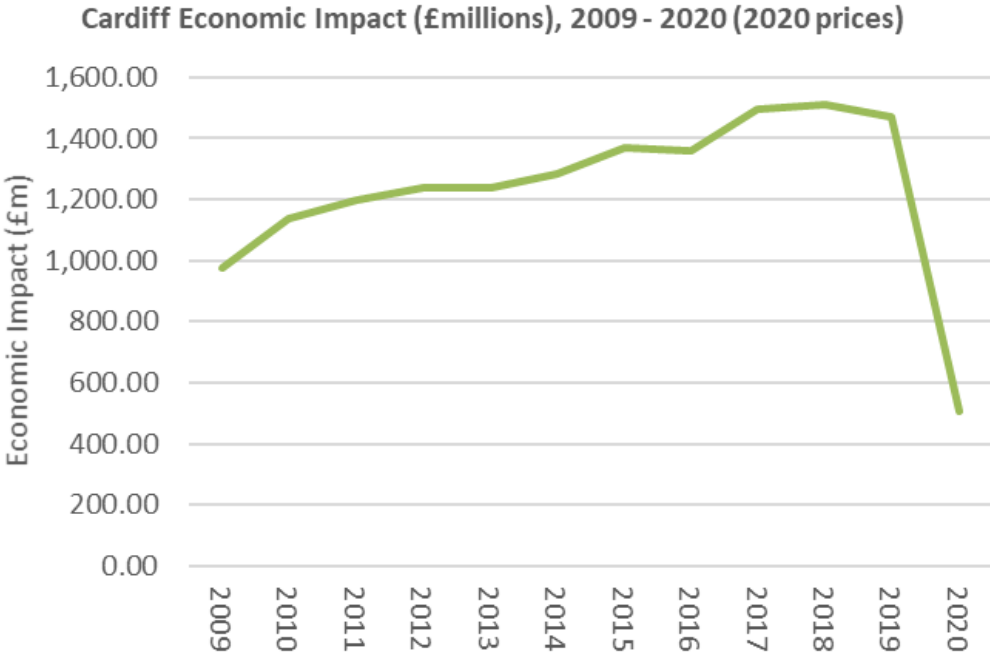
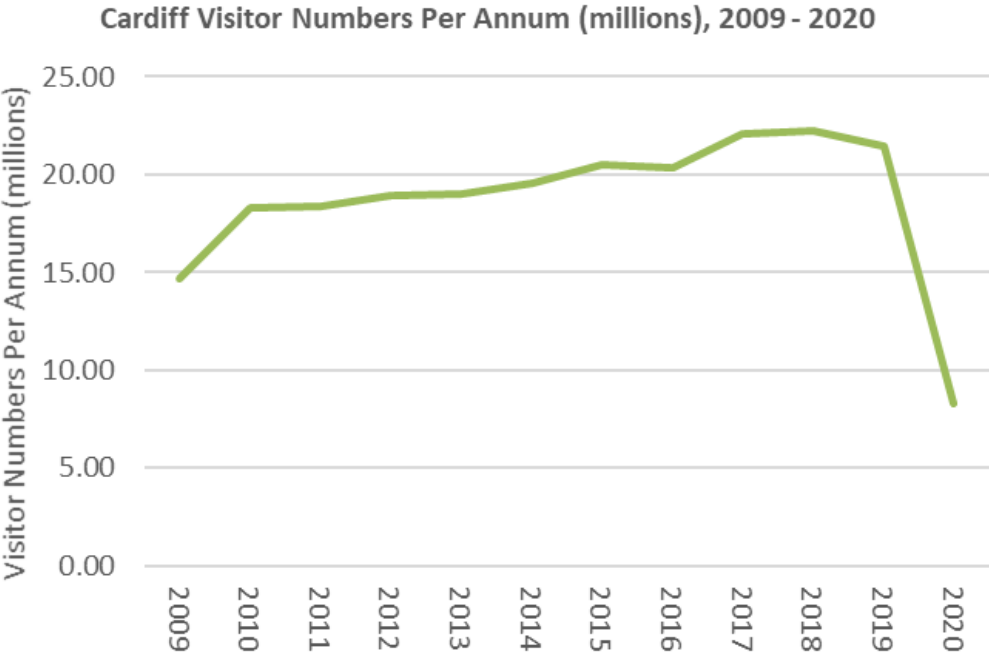


Source: Business Demography, ONS

13. Number of visitors to Cardiff and expenditure/economic impact per resident

Key Points:

- Cardiff visitor numbers fell sharply from 2019 to 2020 due to the Covid-19 pandemic: in 2019, Cardiff received over 21 million visitors, compared to roughly 8.25 million in 2020.
- Consequently, the economic impact of visitors in Cardiff has taken a significant hit, falling by roughly 65% from 2019 to 2020.

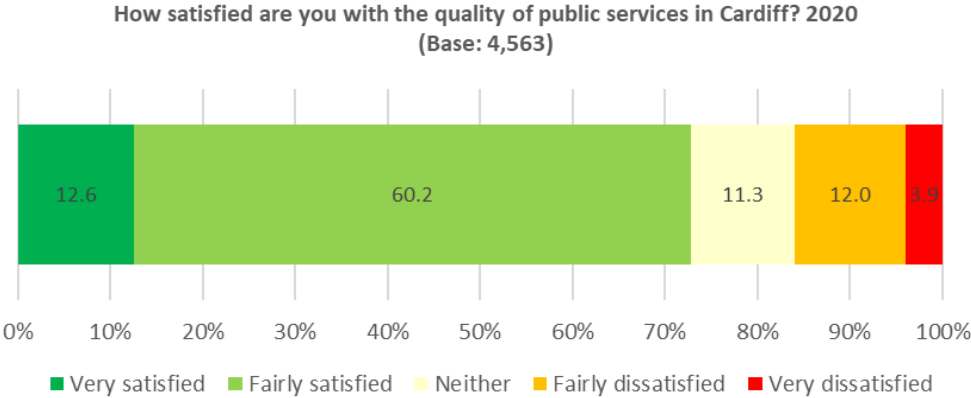


Source: STEAM

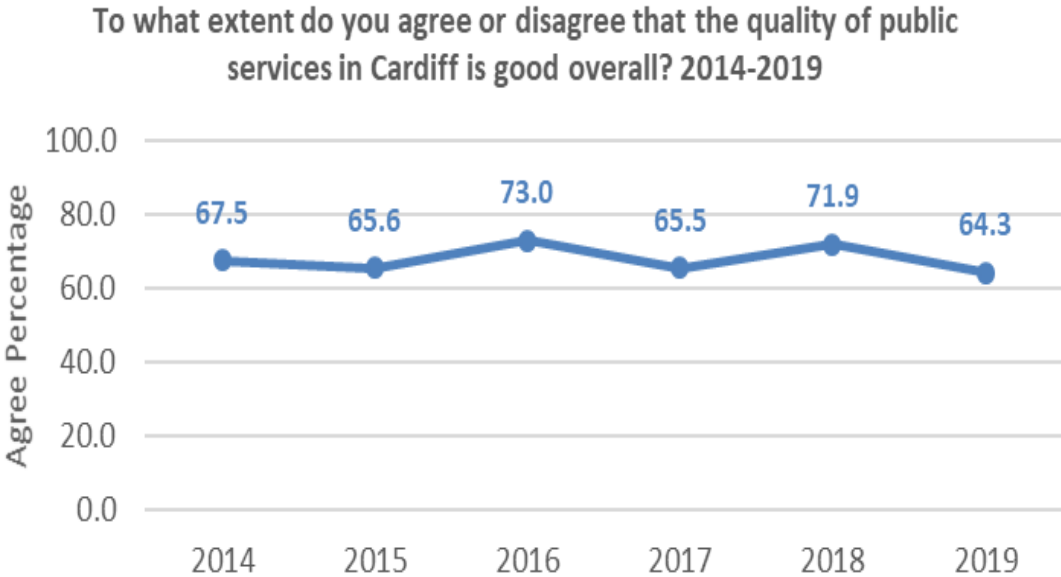
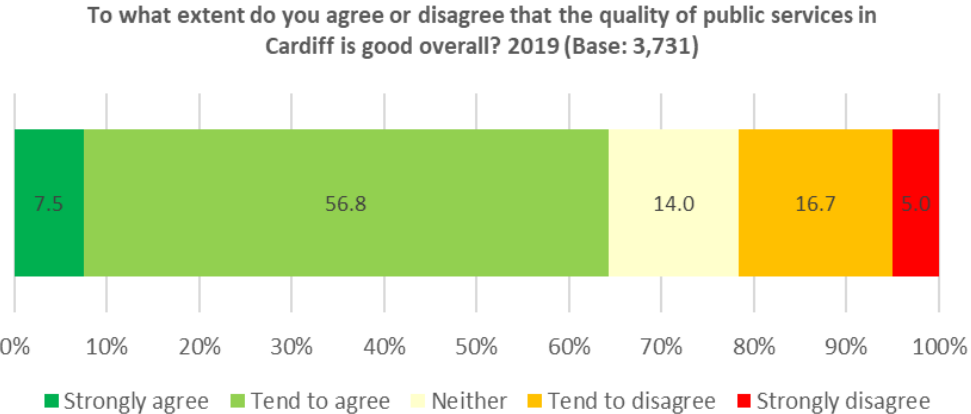
14a. How satisfied are you with the quality of public services in Cardiff?

- Key Points:**
- In 2020, nearly 73% of respondents to Cardiff Council’s Ask Cardiff Survey reported being either very or fairly satisfied with the quality of public services in Cardiff. *[NB. 2020 figures are not directly comparable with previous years due to a change in the wording of the question.]*
 - Between 2014 and 2019 the proportion of respondents that agreed that the quality of public services in Cardiff were good overall remained broadly consistent.
 - Satisfaction in Cardiff’s public services has been maintained despite significant budgetary cuts during this period, which has likely been made possible by the adoption of new and more efficient ways of working, namely the integration of digital technology in the Council’s service delivery.

2020



2019

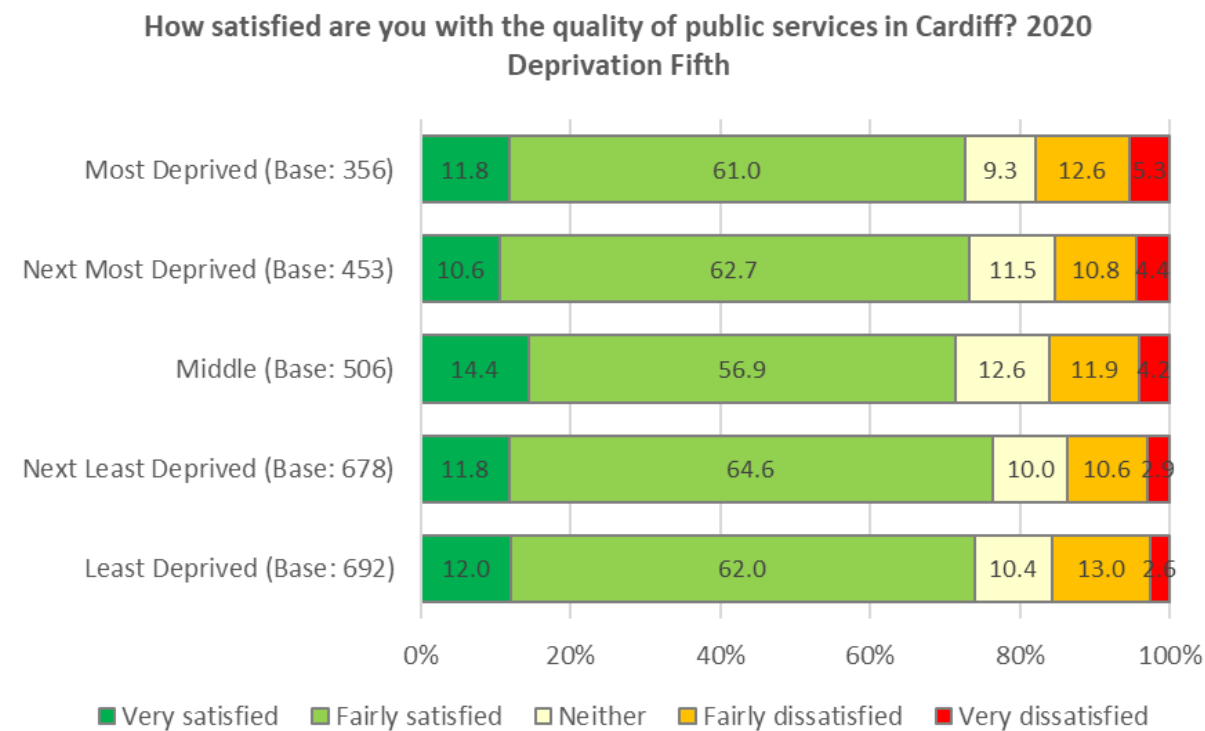


Source: Ask Cardiff Survey, Cardiff Council

14b. How satisfied are you with the quality of public services in Cardiff? (by Deprivation Fifth)

Key Points:

- Satisfaction with the quality of public services in Cardiff is broadly consistent across deprivation fifths, reflecting the Council’s commitment to making good quality services accessible to all communities across the city.
[NB. 2020 figures are not directly comparable with previous years due to a change in wording of the question.]

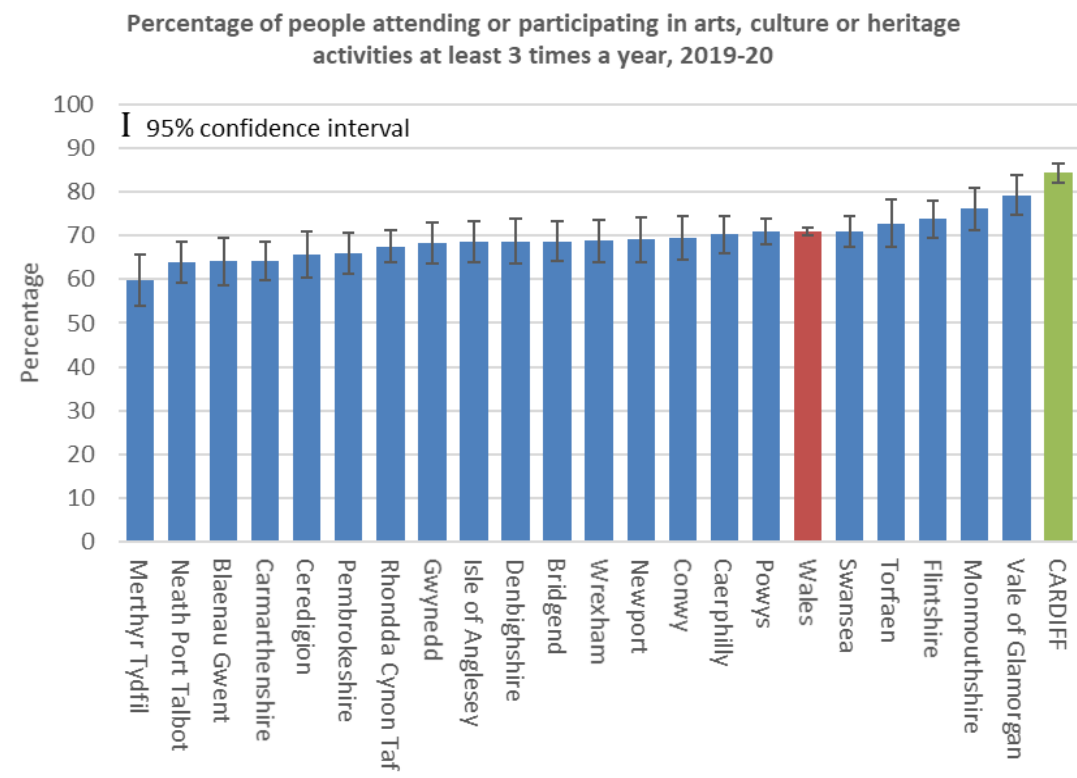


Source: Ask Cardiff Survey, Cardiff Council

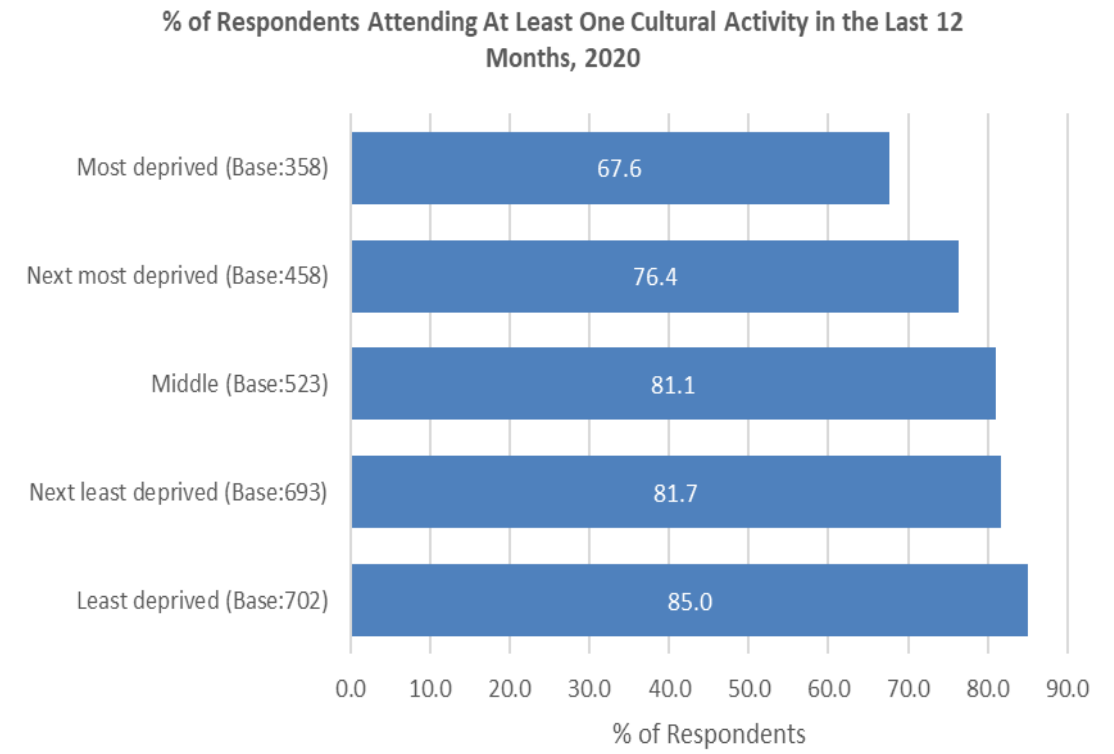
15. Percentage of people attending or participating in arts, culture or heritage activities at least 3 times in a year

Key Points:

- In 2019-20, Cardiff led Wales in the percentage of its residents participating in cultural life, with 84% attending at least three events during the year.
- This rate exceeds the Welsh average by 13 percentage points but is broadly unchanged from 2017-18.
- The most and least deprived fifths of Cardiff’s population are separated by 17.4 percentage points in terms of participation in at least one cultural activity in the past year, with the latter being far more likely to attend a cultural activity.



Source: National Survey for Wales, Welsh Government



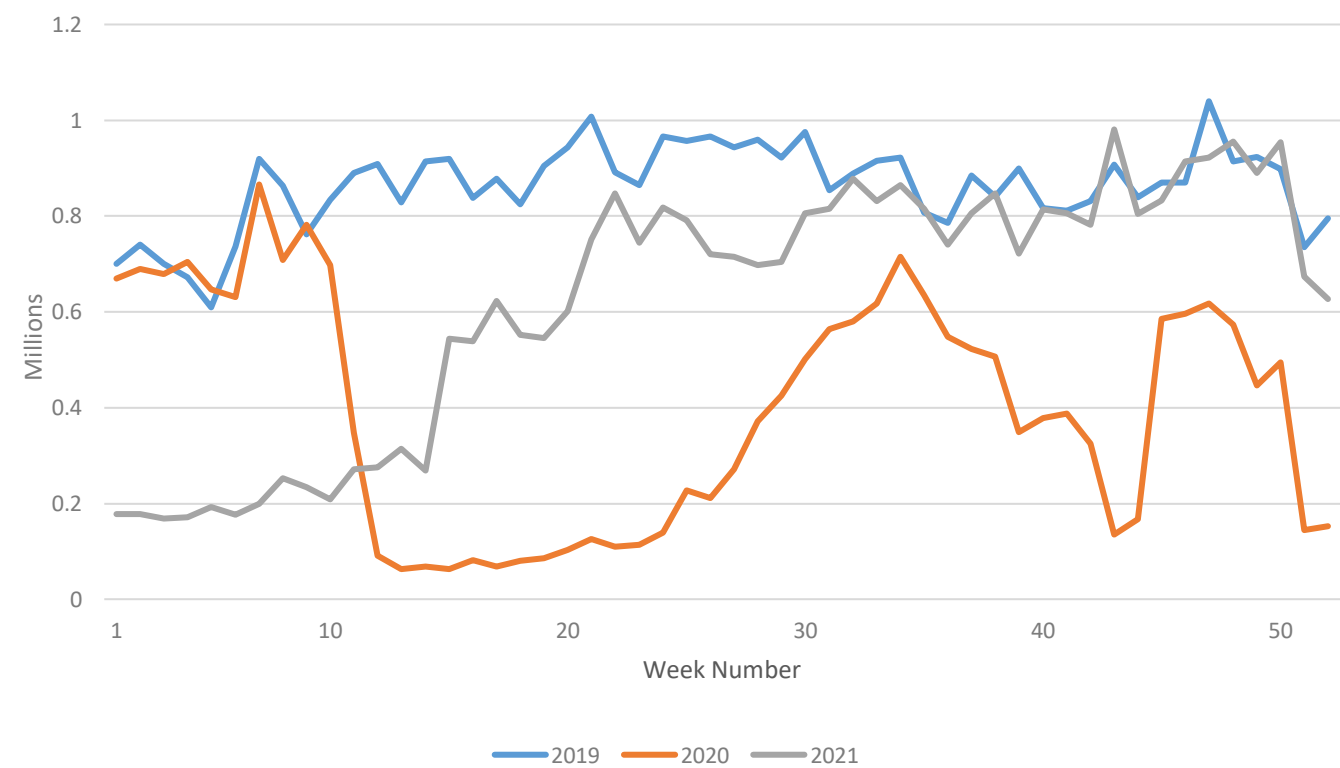
Source: Ask Cardiff Survey, Cardiff Council

16. City centre footfall

Key Points:

- Footfall in Cardiff’s city centre drastically reduced in 2020 as a result of the Covid-19 pandemic. During the summer of 2020, when restrictions were gradually eased to allow the reopening of hospitality with social distancing measures in place, footfall returned to levels just below that of the previous year.
- In 2021, city centre footfall steadily returned to that of pre-pandemic levels.

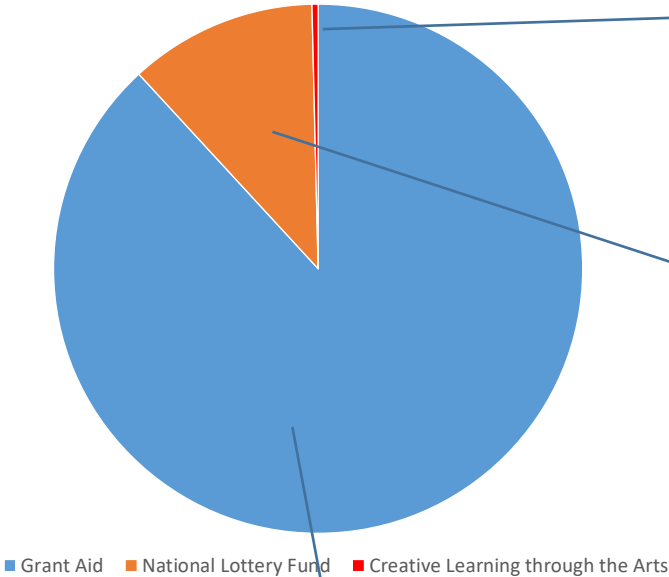
City centre footfall levels



Source: Cardiff Council

17. Funding awarded to arts organisations and individuals (2020-2021)

£31m funding awarded to arts organisations and individuals within the City of Cardiff Council area



Creative Learning through the Arts

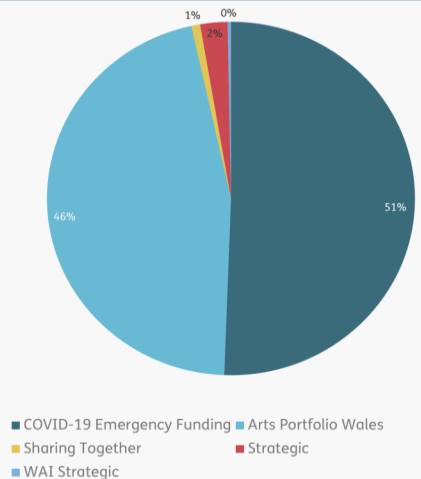
- In 2020-21, **CLTA**, a fund designed to ensure accessibility in learning, and to place creativity at the heart of the curriculum, made up **0.4%** of Cardiff funding (**£116,000**)
- Since 2015, 77.8% of schools in Cardiff engaged with the scheme, investing **£1.3m** in total

National Lottery Fund

- Around one tenth (**£3,579,903**) of all Cardiff funding was National Lottery Funding
- **Connect and Flourish**, a fund intended for the development of collaborative proposals, accounted for one third of Lottery funding (**£1.1m**)
- The second largest funding focus was **Strategic** (aimed at addressing gaps in the sector)

Grant in Aid

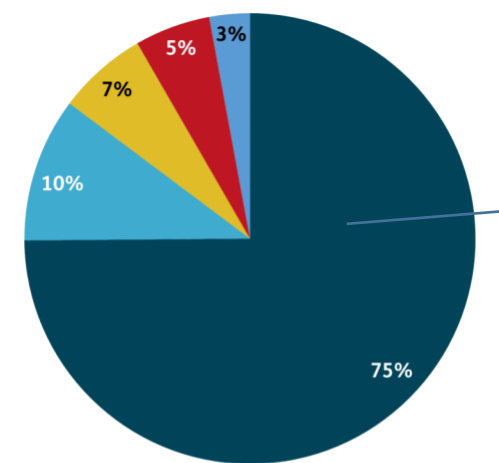
- 88% of Cardiff funding (**£27.5m**) was Grant in Aid
- Around 40% of Grant in Aid (**£11,010,836**) was distributed through 4 Covid-19 emergency funds
- Around 60% (**£16,258,990**) was distributed to Arts Portfolio Wales organisations
- Other Grant in Aid funding was distributed through **Sharing Together** (network-centred funding), **Strategic** (aimed at addressing gaps in the sector) and **Wales Arts International** funds.



18. Covid-19 Emergency Funding and Arts Attendance trends

Covid-19 Emergency Funding

On 30 July 2020, the Welsh Government announced £53 million for a Covid-19 Cultural Recovery Fund. £27.5m of that fund was earmarked for distribution by the Arts Council of Wales. **£12m** of that went to organisations and individuals within Cardiff.



- COVID-19 Cultural Recovery Fund (Revenue)
- COVID-19 Stabilisation Fund for Organisations
- COVID-19 Stabilisation Fund for Individuals
- COVID-19 Cultural Recovery Fund (Capital)
- COVID-19 Urgent Response Fund for Individuals

- 77 individuals and organisations were funded for projects in Wales and beyond
- 75% of emergency funding (£9.1m) was distributed through the **C-19 Cultural Recovery Fund**
- In total, there were **833,546** proposed attendances to **9,376** proposed exhibitions, performances, training sessions and workshop sessions
- **27 freelancers** were awarded funds through the **Arts Resilience fund for Freelancers**

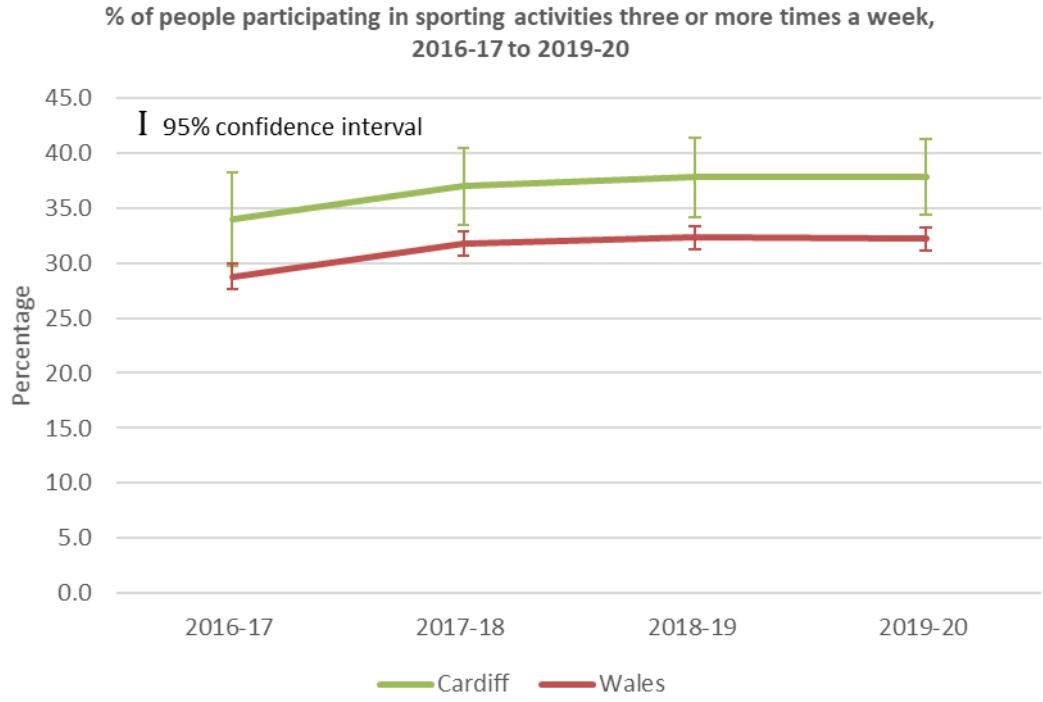
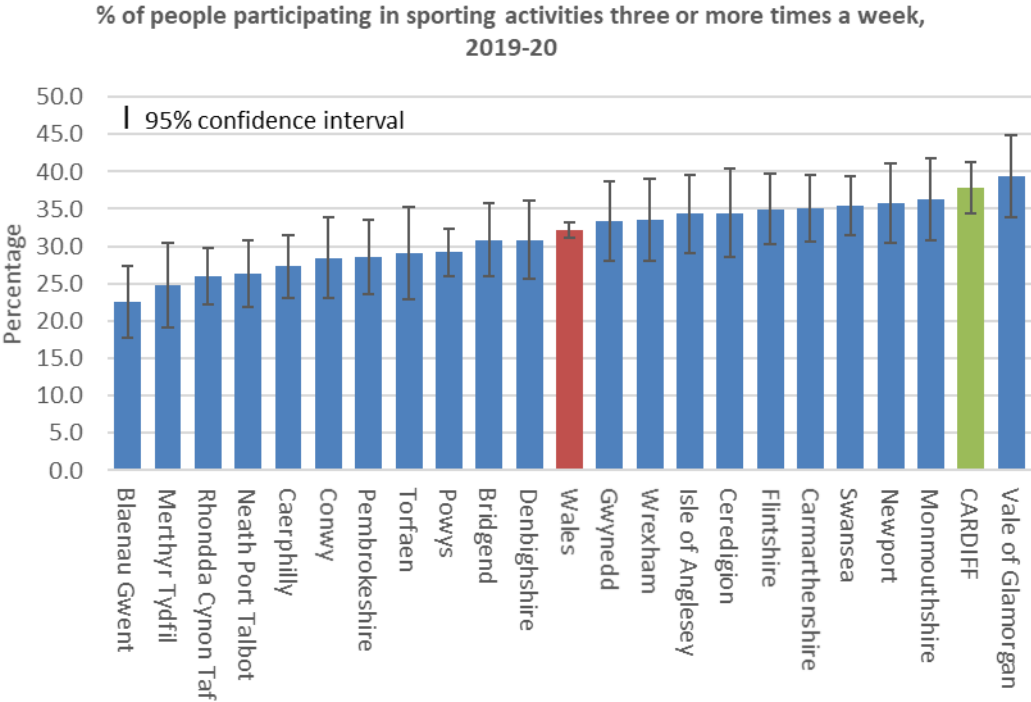
Attendance and Participation

Until 2020, arts attendance in South Central Wales (% attending once a year or more) increased YoY (+6.1% increase in attendance between 2016-2019). **In 2020, attendance dropped to 77%** (down from 89.1% in 2019)

Until 2020, arts participation in South Central Wales (% participating once a year or more) increased YoY (+6.5% between 2016-2019). **In 2020, participation increased to 56.7%** up from 54.5% in 2019.

19. Percentage of people participating in sporting activities three or more times a week

- Key Points:**
- In 2019/20, Cardiff was second in Wales in terms of participation in sporting activities, with 37.8% of residents engaging in sport 3 or more times per week.
 - Between 2016-17 and 2019-20, Cardiff remained consistently above the Welsh average in participation in sporting activities, with the participation rate increasing from 34.0% to 37.8% over the period.
 - *[NB. Welsh Government's National Survey local authority data for 2020/21 will not be available due to the pandemic.]*

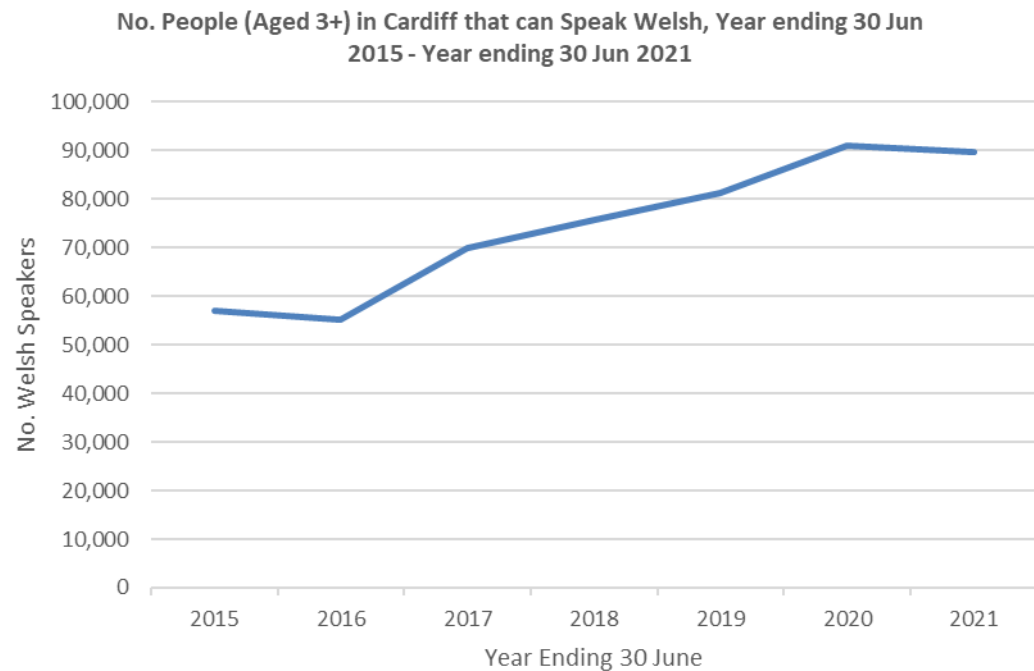
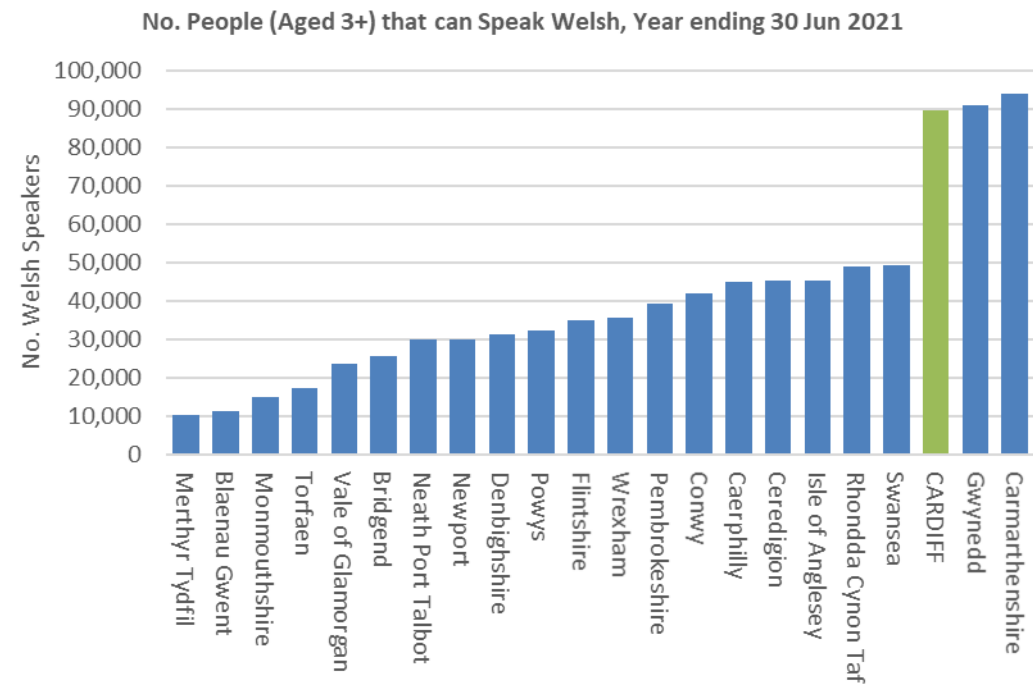


Source: National Survey for Wales, Welsh Government

20. Overall numbers of Welsh speakers in Cardiff

Key Points:

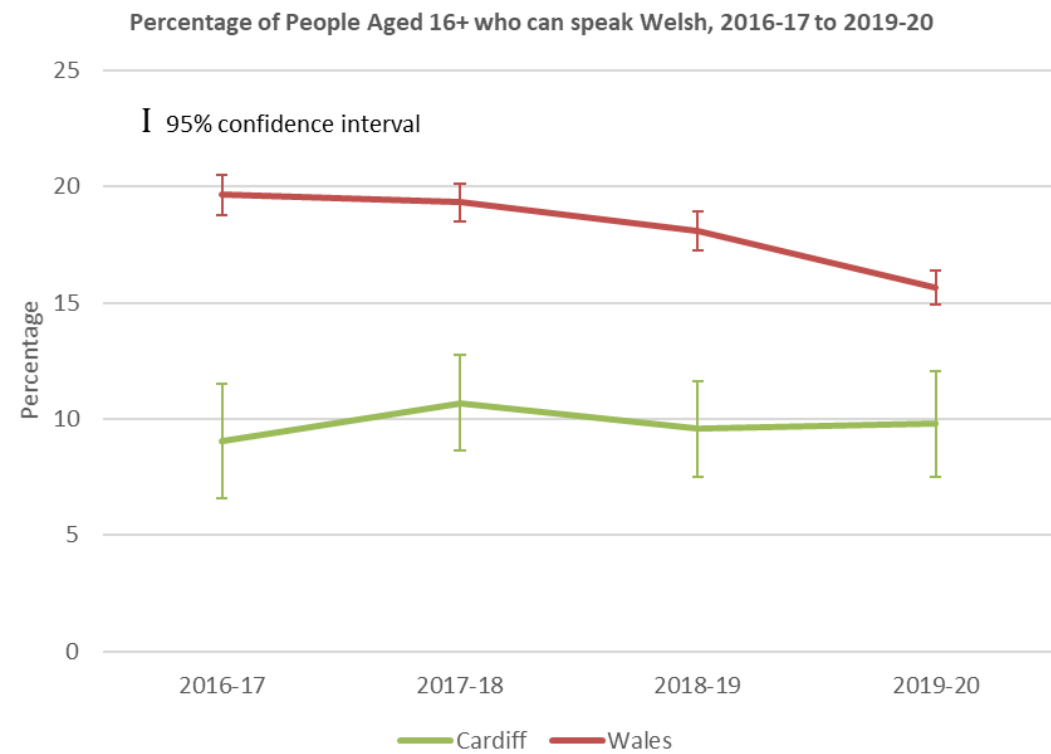
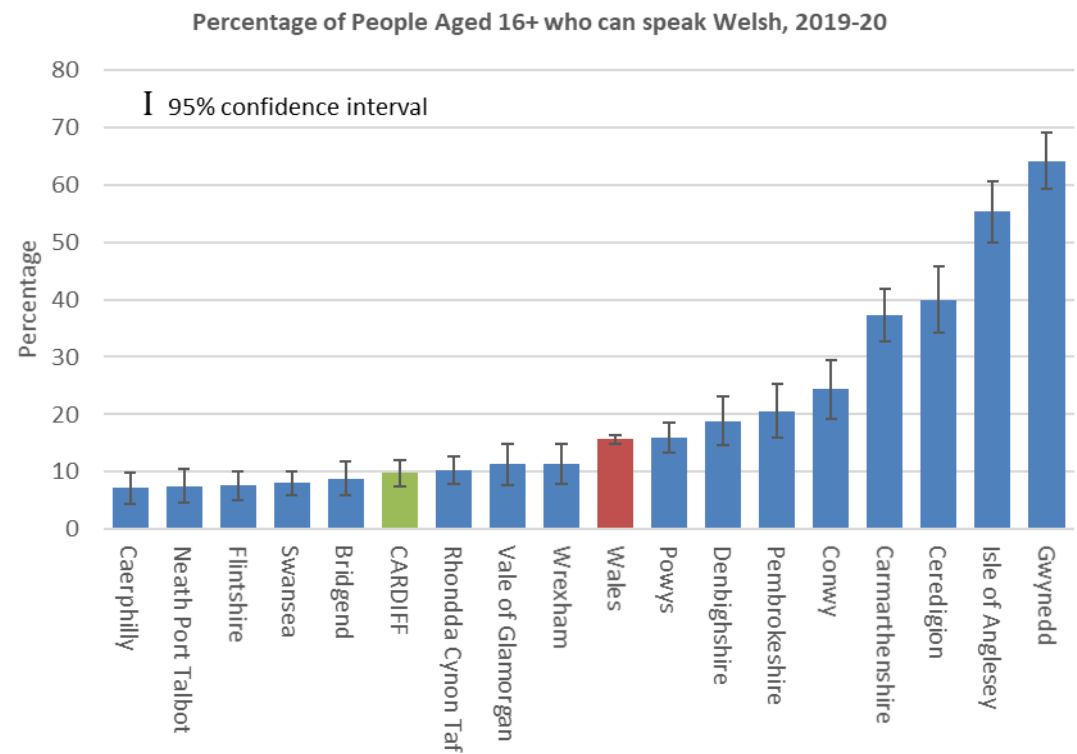
- For the year ending June 2021, there was a total of 89,600 speakers (aged 3 or over) in Cardiff, representing 24.8% of the 3+ population.
- This figure has increased by 34,500 speakers, or roughly 63%, since June 2016; the total percentage of Welsh speakers in Cardiff has risen by 9 percentage points over the same period.
- As in 2016, Cardiff remains third in Wales in total Welsh speakers, behind Gwynedd and Carmarthenshire, but this gap has been narrowed considerably and Cardiff could surpass both in the coming years.
- This significant increase in Welsh speakers is largely attributable to the migration of Welsh speakers from other regions in Wales and the rapid expansion of Welsh language education provision in recent years.



21. Percentage of people aged 16+ who can speak Welsh

Key Points:

- At 10%, the percentage of people aged 16+ in Cardiff who can speak Welsh falls below the Welsh average of 16%.
 - The percentage of Welsh speakers in Cardiff remained relatively static between 2016-17 and 2019-20, rising from 9% to 10% during this period.
 - Welsh Government data from 2019-20 has the percentage of adults (16+) in Cardiff that speak Welsh as 10% but includes a further 4% who report that they have some Welsh language skills, which would increase the overall figure to 14% of Cardiff residents who can speak at least some level of Welsh.
- [NB. Welsh Government's National Survey local authority data for 2020-21 will not be available due to the pandemic.]*



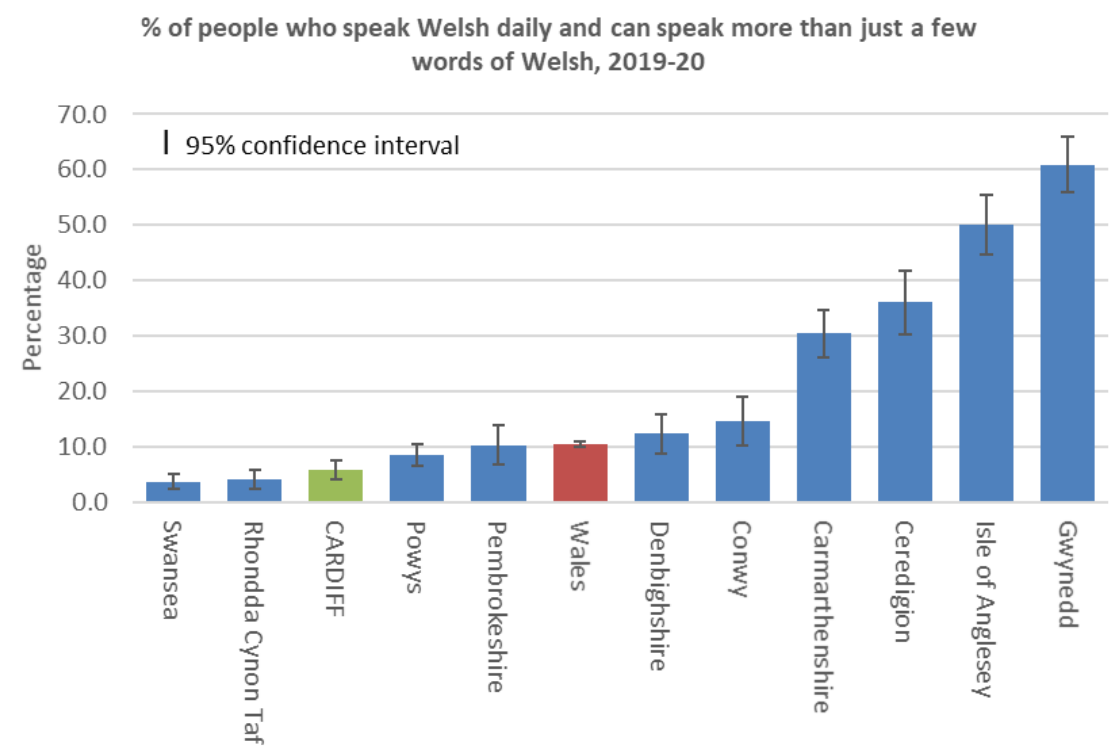
NB. Figures for Blaenau Gwent, Merthyr Tydfil, Monmouthshire, Newport, and Torfaen are not included in the chart as the data is disclosive or not sufficiently robust for publication.

22. Percentage of people who speak Welsh daily and can speak more than just a few words of Welsh

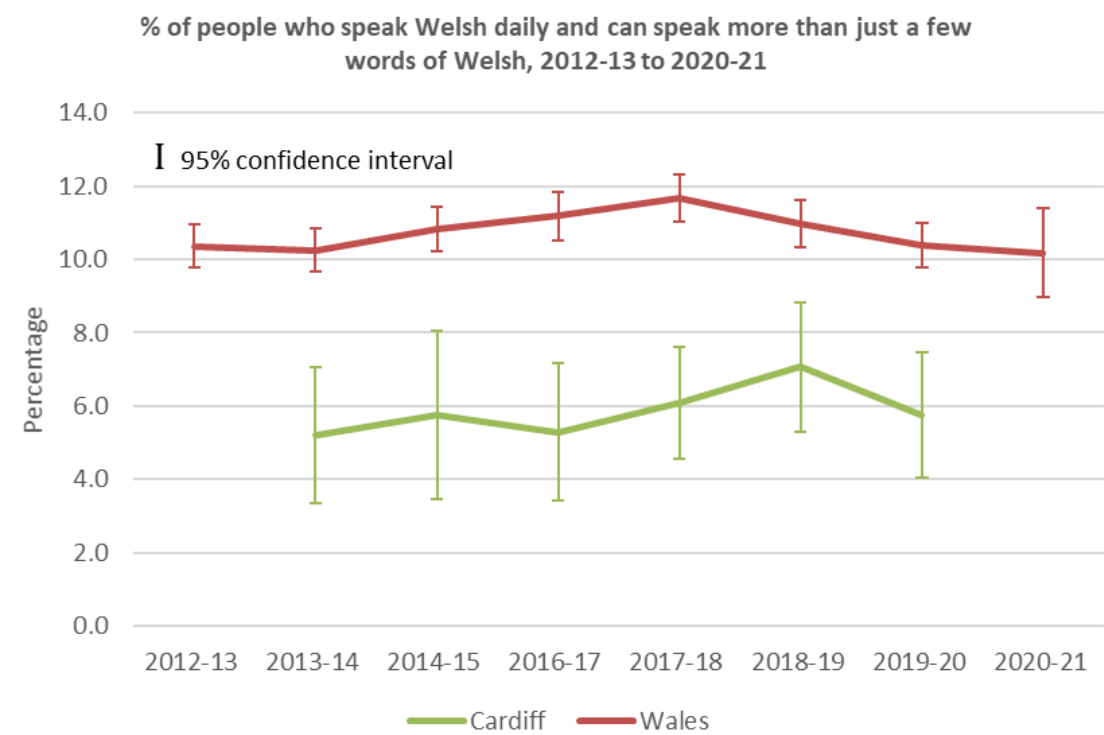
Key Points:

- In 2019-20, Cardiff had one of the lowest percentages of daily and relatively strong Welsh speakers in Wales, at 5.7%, falling well short of the Welsh average of 10.4% and the much higher levels seen in North and West Wales.
- Between 2013-14 and 2019-20, this percentage remained relatively unchanged.

[NB. Local authority data for 2020/21 is available but Cardiff's data is disclosive or not sufficiently robust for publication.]



NB. Figures for several local authorities are not included in the chart as their data is disclosive or not sufficiently robust for publication.

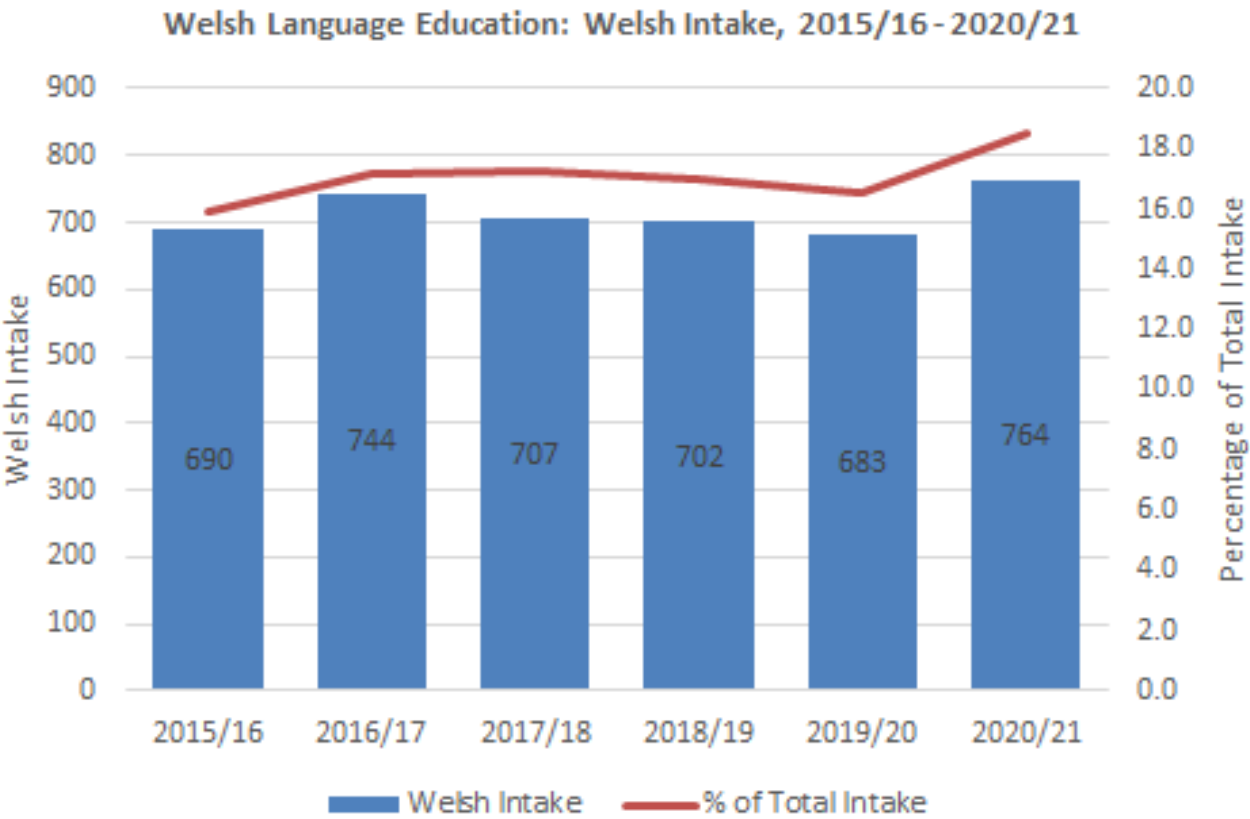


NB. Cardiff figures for 2012-13 and 2020-21 are disclosive or not sufficiently robust for publication

23. Welsh Language Education in Cardiff

Key Points:

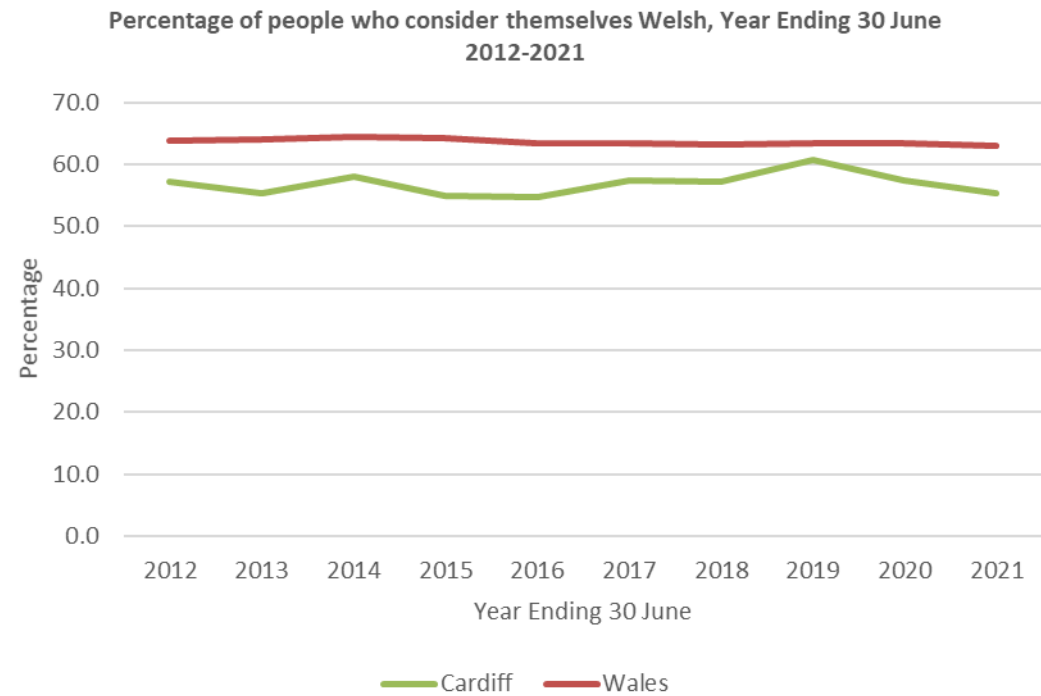
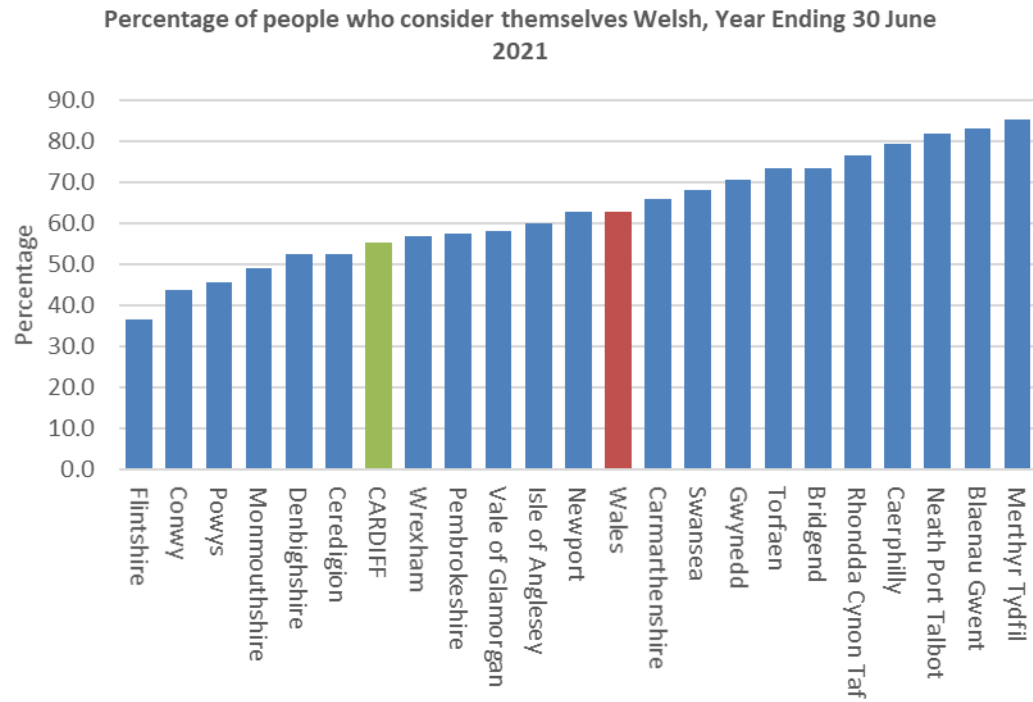
- 764 pupils were allocated Reception places at Welsh-medium primary schools for September 2020, which made up 18.5% of the total intake, compared to 690 pupils making up 15.9% of total intake in 2015/16.
- The 2020 figure represents the highest intake to Welsh-medium primary schools for Cardiff.



Source: Welsh in Education Strategic Plan/ Annual Education Report (Cardiff Council)

24. Percentage of people who consider themselves Welsh

- Key Points:**
- For the year ending June 2021, 55.3% of people in Cardiff considered themselves to be Welsh, well below the figure of 85.5% in Merthyr Tydfil.
 - Cardiff's rate has remained relatively unchanged since 2012 and has consistently been below the Welsh average.



Source: Annual Population Survey/Welsh Government