

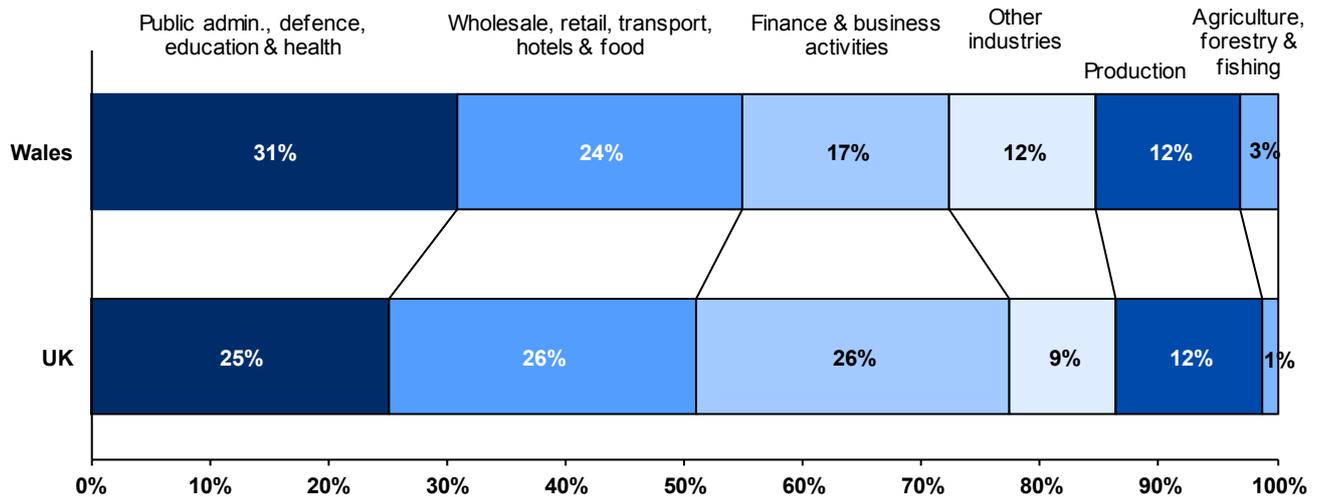
SB 100/2015

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## Workplace employment by industry in Wales, 2001 to 2014

This statistical bulletin uses a range of data sources to estimate workplace employment, or total jobs, by industry sector for UK, Wales and local areas within Wales up to the year ending December 2014.

**Chart 1: Share of workplace employment by industry, Wales and the UK, 2014**



### Key Points

Comparing workplace employment in Wales in 2014 with earlier years:

- By 2014 workplace employment had increased to 1.397 million, this is the highest level since the series began.
- Between 2013 and 2014 total workplace employment increased by 31 thousand, or 2 per cent; the corresponding UK figure also increased by 2 per cent (table 1).

Chart 1 above shows that compared to the UK:

- employment in Wales was proportionately higher in agriculture, forestry & fishing sector; public administration, defence, education & health sector (which is *not* the same as the public sector); and the other industries sector;
- the proportion of employment was equal in the production sector; and
- employment in Wales was a lower proportion in the wholesale, retail, transport, hotels & food sector and the finance & business activities sector.

There was substantial variation between industries within local authorities in Wales (table 4):

- in the production sector, employment varied from 4 per cent in Conwy to 29 per cent in Flintshire;
- in public administration, defence, education & health sector, employment varied from 17 per cent of the total in Flintshire to 37 per cent Denbighshire (chart 8 and table 4).

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## INTRODUCTION

This statistical bulletin shows the distribution and trends of workplace employment by industry in the UK, Wales, and areas within Wales between 2001 and 2014. It shows the impact of the recession across the UK during 2008 and 2009 and the subsequent recovery up to the end of 2014.

These were the only official estimates of total employment by industry in Wales, i.e. including employees and the self-employed, until July 2010 when the ONS released improved workforce jobs estimates. These improved estimates include workforce jobs by industry (rather than employee jobs by industry). A comparison between this Welsh Government workplace employment publication and ONS' workforce jobs series is given in the 'Key quality information: coherence with other sources' section on page 19.

This bulletin remains the only official source of workplace employment by industry and local authority in Wales.

Throughout the bulletin the symbol “-” indicates that the figure is between 0 and 500 (or 0 and -500). This is used to differentiate between a low number and a true zero as figures are rounded to the nearest 1,000.

The industrial sectors 'Public administration, education & health' overlap, but should **not** be regarded as identical to the public sector. This is because these industry sectors include private sector education and health (and social services) and don't include public sector activity in other industrial sectors (e.g. finance). The official estimates of public sector employment can be found at: <http://www.ons.gov.uk/ons/rel/pse/public-sector-employment/index.html>

## METHODOLOGY AND SOURCES

Reference should be made to the following background notes and key quality information which start on page 17 when interpreting these estimates:

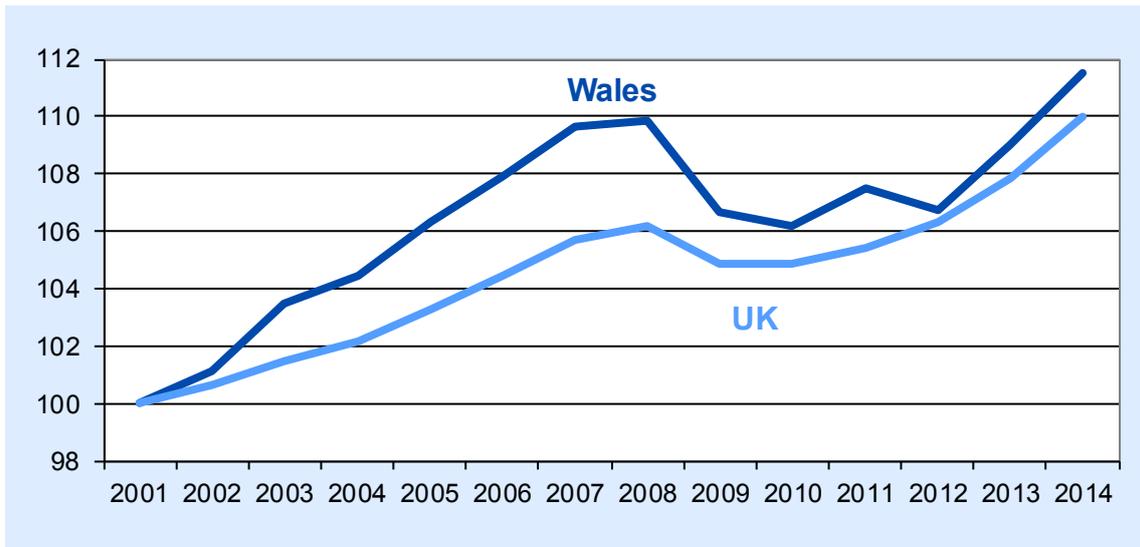
- |                 |   |
|-----------------|---|
| Notes 8 and 9   | for details of the differences between the UK estimates presented here and ONS workforce jobs estimates |
| Note 11         | for details of the methodology used in deriving these estimates   |
| Note 13         | describes the differences in these estimates and other estimates of employment and workforce jobs       |
| Notes 14 and 15 | for details of the coverage of these estimates  |

These workplace employment estimates are derived using data from the following three sources:

- Employee jobs data, together with self-employed jobs and government supported trainees data from the Annual Population Survey (APS);
- Business Register and Employment Survey (BRES);
- Welsh Agricultural Census.

## SECTION 1: WORKPLACE EMPLOYMENT FOR WALES AND THE UK

**Chart 2: Workplace employment between 2001 and 2014, Wales and the UK<sup>1</sup> (2001=100) (r)**



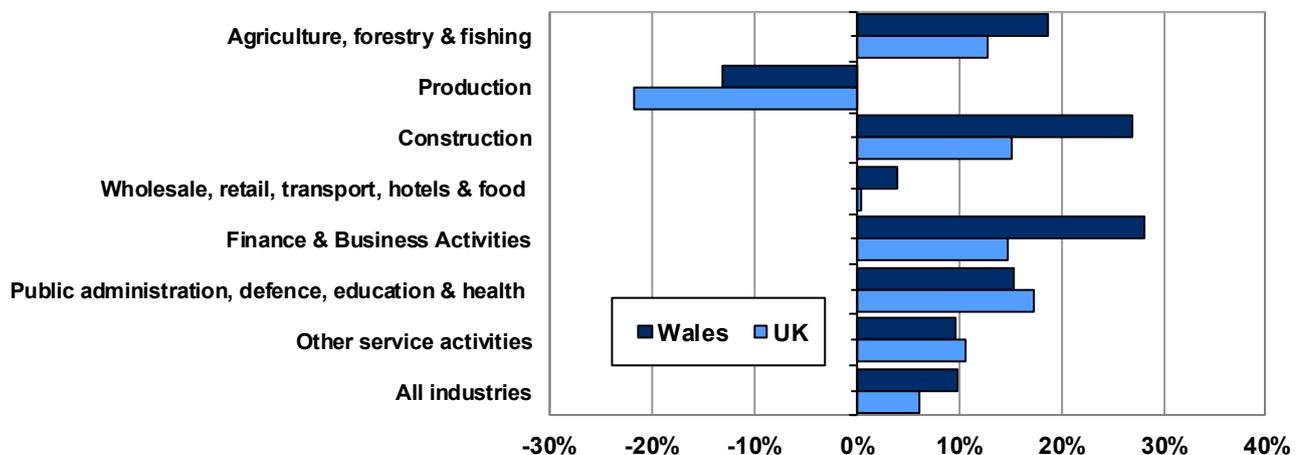
1. See background notes 8 and 9 for details of the differences between the UK estimates presented here and ONS workforce jobs estimates. Also see background note 11 for details of the methodology used in deriving these estimates and notes 14 and 15 for details of the coverage of these estimates.

(r) 2006-2013 data has been revised since the previous publication following the reweighting of the APS.

- Between 2001 and 2008, Wales saw greater growth in workplace employment compared to the UK, growing by 10 per cent over the seven years compared with 6 per cent for the UK.
- With the onset of recession between 2008 and 2010, Wales saw greater falls relative to the UK; falling 3 per cent over the two years compared with 1 per cent for the UK.
- Between 2010 and 2014 workplace employment in Wales and the UK have grown in broadly at the same rate, with 5 per cent growth for both Wales and the UK over these four years.

Chart 2 above shows that the changes in workplace employment fell into three distinct periods: an overall growth in jobs between 2001 and 2008; recession and a fall in jobs between 2008 and 2010; then a period of recovery from 2010 onwards. Each period was associated with a different pattern of changes in workplace employment by broad industry sector. These patterns over the three periods are shown in charts 3 to 5.

**Chart 3: Percentage change in workplace employment by industry between 2001 and 2008 (r)**

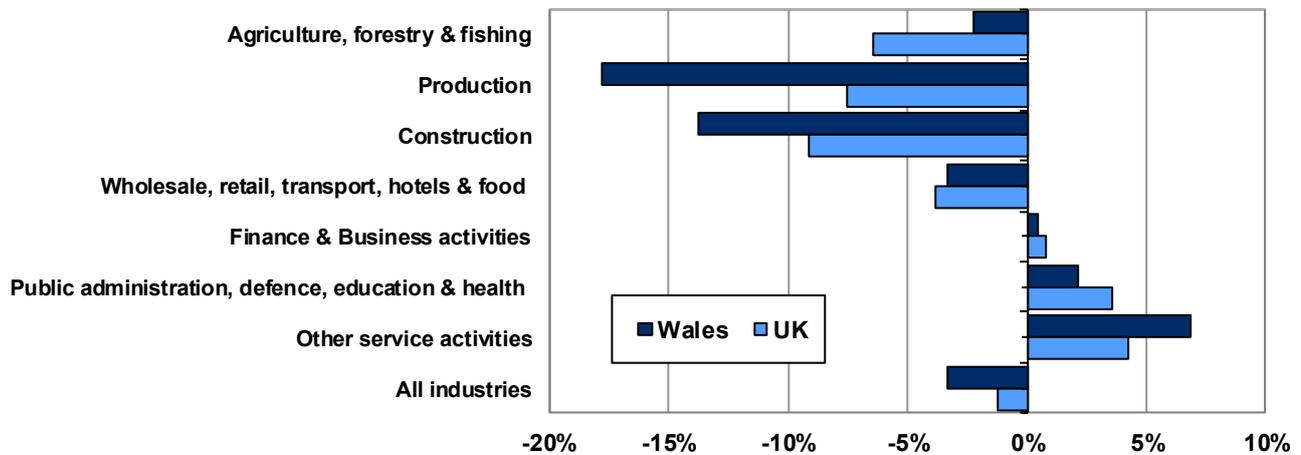


(r) 2006-2013 data has been revised since the previous publication.

**Between 2001 and 2008:**

- In both Wales and the UK there were increases in employment in 6 of the 7 industry sectors with a fall in the remaining sector (production) which fell by 13 per cent in Wales and by 22 per cent in the UK.
- The finance & business activities sector had the largest percentage increase in employment in Wales (up 28 per cent), followed by the construction sector (up 27 per cent). These 2 industry sectors also grew in the UK, both up 15 per cent; although the public administration, defence, education & health sector (which is *not* the same as the public sector) had the largest percentage increase (17 per cent) in the UK.
- Of the 6 sectors showing an increase in employment, 68 per cent of the increase in Wales and 79 per cent of the increase in the UK was accounted for by the public administration, defence, education & health and the finance & business activities sectors.

**Chart 4: Percentage change in workplace employment by industry between 2008 and 2010 (r)**

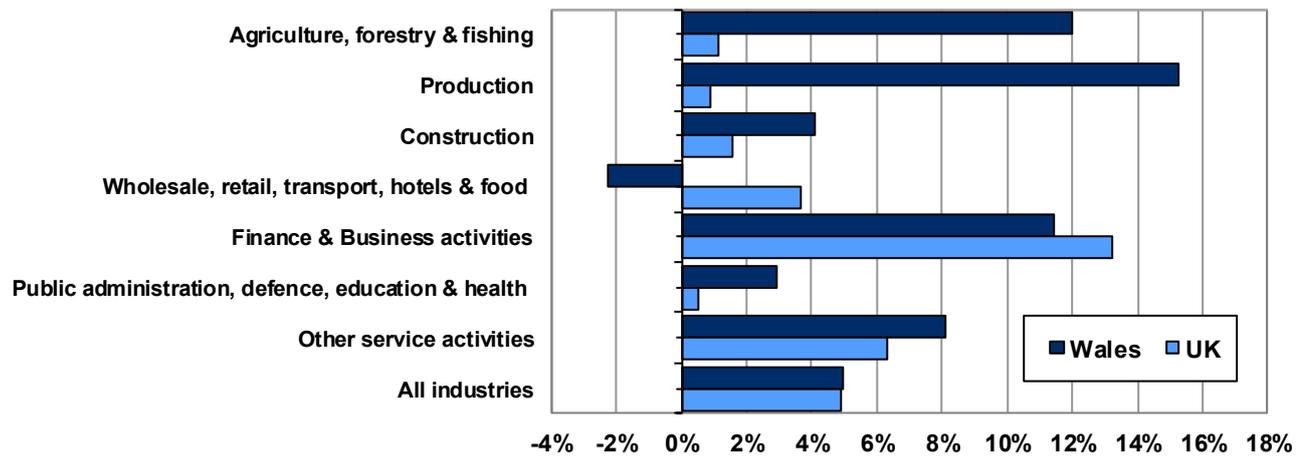


(r) 2006-2013 data has been revised since the previous publication.

**Between 2008 and 2010:**

- In both Wales and the UK there were falls in employment in 4 of the 7 industry sectors and increases in 3 sectors.
- In Wales the production sector had the largest fall in employment (down 32 thousand, or 18 per cent) followed by the construction sector (down 15 thousand, or 14 per cent) with these 2 sectors accounting for 79 per cent of the total fall. These same 2 sectors accounted for 56 per cent of the fall in the UK.
- Of the 3 sectors employment increased, the other service activities sector had the largest percentage increase in both Wales and the UK (up 7 per cent and up 4 per cent respectively).

**Chart 5: Percentage change in workplace employment by industry between 2010 and 2014**



(r) 2006-2013 data has been revised since the previous publication.

**Between 2010 and 2014:**

- In Wales there have been increases in employment in 6 of the 7 industry sectors and a fall in the wholesale, retail, transport, hotels & food sector. In the UK there were increases in all 7 sectors.
- The production sector had the largest percentage increase in employment in Wales (up 15 per cent) followed by the agriculture, forestry & fishing sector (up 12 per cent).
- In the UK the largest percentage increases were in the finance & business activities sector (up 13 per cent) and the other service activities sector (up 6 per cent).

**Table 1: Workplace employment by industry for Wales and the UK<sup>1, (r)</sup>**

Area and industry	Numbers in thousands						
	2001	2013	2014	Change in latest levels since: <sup>(2)</sup>		Percentage change in latest since: <sup>(2)</sup>	
				2001	2013	2001	2013
<b>Wales:</b>							
Agriculture, forestry & fishing	33	37	43	10	6	30%	16%
Mining & quarrying	3	2	2	-1	-	-34%	-1%
Manufacturing	193	143	153	-40	10	-21%	7%
Electricity, gas, steam & air conditioning	5	7	7	2	-	42%	3%
Water supply; sewerage, waste management & remediation activities	8	12	11	2	-2	29%	-13%
Construction	85	89	97	12	8	14%	9%
Wholesale & retail trade; repair of motor vehicles & motorcycles	210	201	194	-16	-7	-8%	-4%
Transportation & storage	49	47	48	-	1	-1%	2%
Accommodation & food service activities	84	97	94	10	-3	12%	-3%
Information & communication	25	27	36	11	9	44%	33%
Financial & insurance activities	26	32	32	6	-	24%	-
Real estate activities	12	18	22	10	4	90%	23%
Professional, scientific & technical activities	43	73	65	22	-8	50%	-11%
Administrative & support service activities	64	77	88	25	11	39%	14%
Public administration & defence; compulsory social security	74	90	87	13	-2	18%	-3%
Education	114	133	134	20	2	18%	1%
Human health & social work activities	167	205	209	43	4	26%	2%
Arts, entertainment & recreation	30	41	39	9	-2	32%	-5%
Other industries	29	35	35	6	-	21%	-
<b>All industries</b>	<b>1,253</b>	<b>1,366</b>	<b>1,397</b>	<b>144</b>	<b>31</b>	<b>11%</b>	<b>2%</b>
<b>United Kingdom:</b>							
Agriculture, forestry & fishing	388	371	415	26	44	7%	12%
Mining & quarrying	72	65	69	-3	4	-4%	6%
Manufacturing	3,519	2,437	2,449	-1,070	12	-30%	-
Electricity, gas, steam & air conditioning	109	116	116	6	-	6%	-
Water supply; sewerage, waste management & remediation activities	153	186	182	29	-4	19%	-2%
Construction	1,955	2,027	2,077	122	51	6%	3%
Wholesale & retail trade; repair of motor vehicles & motorcycles	4,925	4,571	4,619	-307	47	-6%	1%
Transportation & storage	1,406	1,420	1,460	54	39	4%	3%
Accommodation & food service activities	1,756	1,987	2,026	270	39	15%	2%
Information & communication	1,173	1,275	1,325	152	51	13%	4%
Financial & insurance activities	1,025	1,059	1,069	44	10	4%	1%
Real estate activities	418	516	519	101	3	24%	1%
Professional, scientific & technical activities	1,713	2,626	2,757	1,044	131	61%	5%
Administrative & support service activities	2,027	2,509	2,655	628	145	31%	6%
Public administration & defence; compulsory social security	1,336	1,306	1,270	-66	-36	-5%	-3%
Education	2,217	2,719	2,732	515	12	23%	-
Human health & social work activities	2,932	3,892	3,922	989	30	34%	1%
Arts, entertainment & recreation	752	891	911	159	20	21%	2%
Other industries	704	857	873	169	16	24%	2%
<b>All industries</b>	<b>28,580</b>	<b>30,827</b>	<b>31,443</b>	<b>2,863</b>	<b>616</b>	<b>10%</b>	<b>2%</b>

Source: Annual Population Survey, Business Register and Employment Survey and Welsh Agricultural Census

1. See background notes 8 and 9 for details of the differences between the UK estimates presented here and ONS workforce jobs estimates. Also see note 11 for details of the methodology used in deriving these estimates and notes 14 and 15 for details of the coverage of these estimates. The full series can be found at:

<https://stats.wales.gov.uk/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Employment/Jobs/Whole-Workforce>

2. Data on levels is rounded to the nearest thousand; changes are based on unrounded data, then rounded to the nearest thousand, so may not sum.

(r) 2006-2013 data has been revised since the previous publication.

**Table 1 shows that:**

**Between 2001 and 2014:**

- Workplace employment in Wales increased by 11 per cent, with 15 of the 19 industry sectors increasing, 3 industry sectors decreasing and one with little change. Workplace employment in the UK increased by 10 per cent, with increases in 15 of the 19 industry sectors and decreases in 4 industry sectors. Of the 3 industry sectors which fell in Wales, all 3 also fell in the UK.
- In Wales, the human health & social work activities sector had the largest absolute increase (up 43 thousand, or 26 per cent) followed by the administrative & support service activities sector (up 25 thousand, or 39 per cent) and the professional, scientific & technical activities sector (up 22 thousand or 50 per cent). The largest absolute falls were in the manufacturing sector (down 40 thousand or 21 per cent) and the wholesale & retail trade; repair of motor vehicles & motorcycles sector (down 16 thousand or 8 per cent).
- In the UK the professional, scientific & technical activities sector had the largest absolute increase (up 1,044 thousand or 61 per cent) followed by human health and social work activities sector (up 989 thousand or 34 per cent). The largest absolute fall was in the manufacturing sector (down 1,070 thousand or 30 per cent).
- The largest differences in the percentage change over this period between Wales was in the real estate activities sector which increased by 90 per cent. In the UK professional, scientific & technical activities had the largest difference, an increase of 61 per cent.

**Between 2013 and 2014:**

- Workplace employment in Wales increased by 31 thousand or 2 per cent, with increases in 10 of the 19 industry sectors, decreases in 7 sectors, while 2 were little changed. In the UK workplace employment increased by 616 thousand or 2 per cent, with increases in 14 of the 19 industry sectors, decreases in 2 sectors, while 3 sectors were little changed.
- The largest absolute increase in the number of jobs in Wales was in the administrative & support service activities sector (up 11,000, or 14 per cent) followed by the manufacturing sector (up 10,000, or 7 per cent). The professional, scientific & technical activities had the largest absolute fall, down 8,000 or 11 per cent, followed by and the wholesale & retail trade; repair of motor vehicles & motorcycles sector which has a fall of 7,000 or 4 per cent respectively.
- The administrative & support service activities sector also the largest absolute increase in the number of jobs in the UK (up 145,000, or 6 per cent) followed by the professional, scientific & technical activities sector (up 131,000, or 5 per cent). The sector with the largest absolute fall across the UK was the public administration & defence; compulsory social services sector (which is *not* the same as the public sector), down 36,000 or 3 per cent.

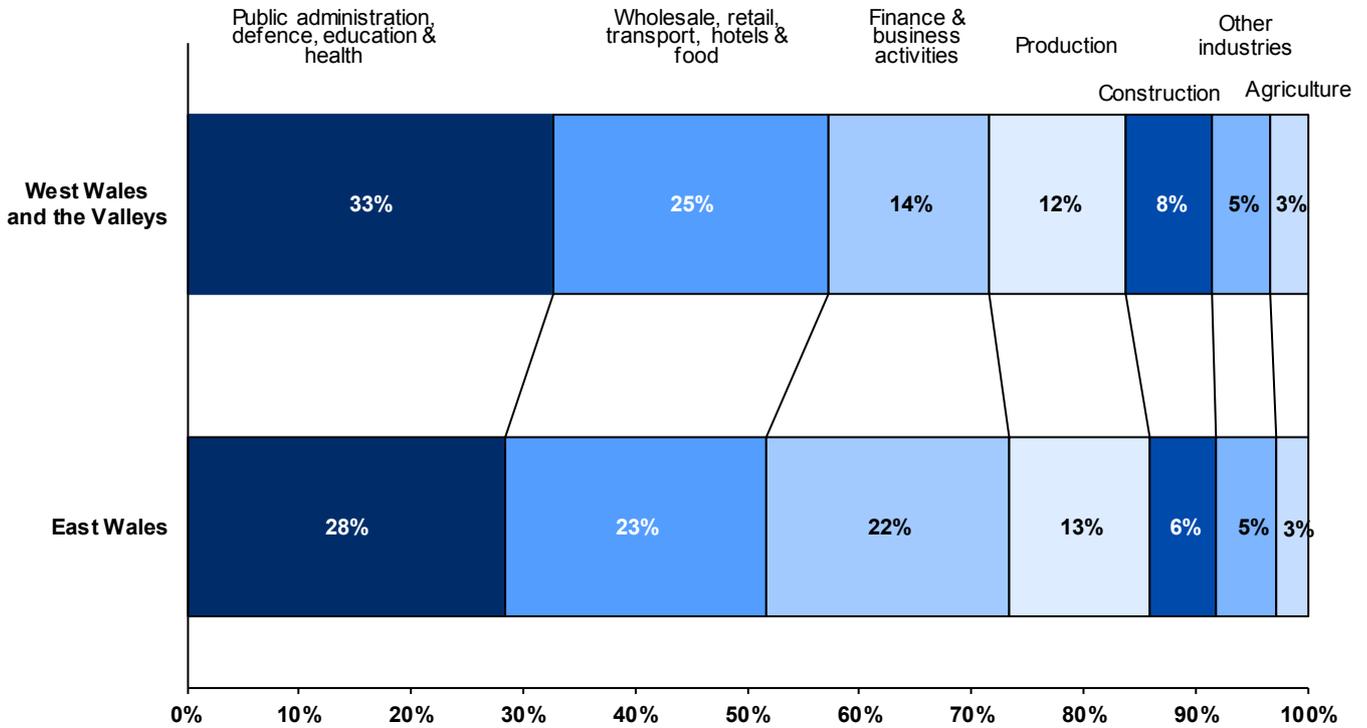
**In 2014:**

- In Wales the human health & social work activities sector (which includes the private sector) was the largest industry sector in terms of workplace employment. The human health & social work activities sector had overtaken the manufacturing sector in 2004 to become the second biggest sector in Wales between 2004 and 2010, in 2011 it overtook the wholesale & retail trade; repair of motor vehicles & motorcycles sector to become the largest sector in Wales.
- The wholesale & retail trade; repair of motor vehicles & motorcycles sector was the second largest sector in Wales followed by the manufacturing sector, the education sector and the construction sector. These top 5 industry sectors accounted for over half of the total jobs in Wales (56 per cent).
- In the UK the wholesale & retail trade; repair of motor vehicles & motorcycles sector remains the largest sector followed by the human health & social work activities sector, the professional, scientific & technical activities, the education sector and the administrative & support service activities sector. These top 5 industry sectors accounted for over half of the total jobs in the UK (53 per cent).

## SECTION 2: WORKPLACE EMPLOYMENT FOR WELSH NUTS2 AREAS

Chart 6 below shows the shares of workplace employment by industry groupings for the two NUTS2 areas of Wales, please see background note 6 on page 16.

**Chart 6: Share of workplace employment by industry for Welsh NUTS2 areas, 2014<sup>1</sup>**



1. See background note 6 for the definition of the NUTS2 areas in Wales. Also see note 11 for details of the methodology used in deriving these estimates and notes 14 and 15 for details of the coverage of these estimates.

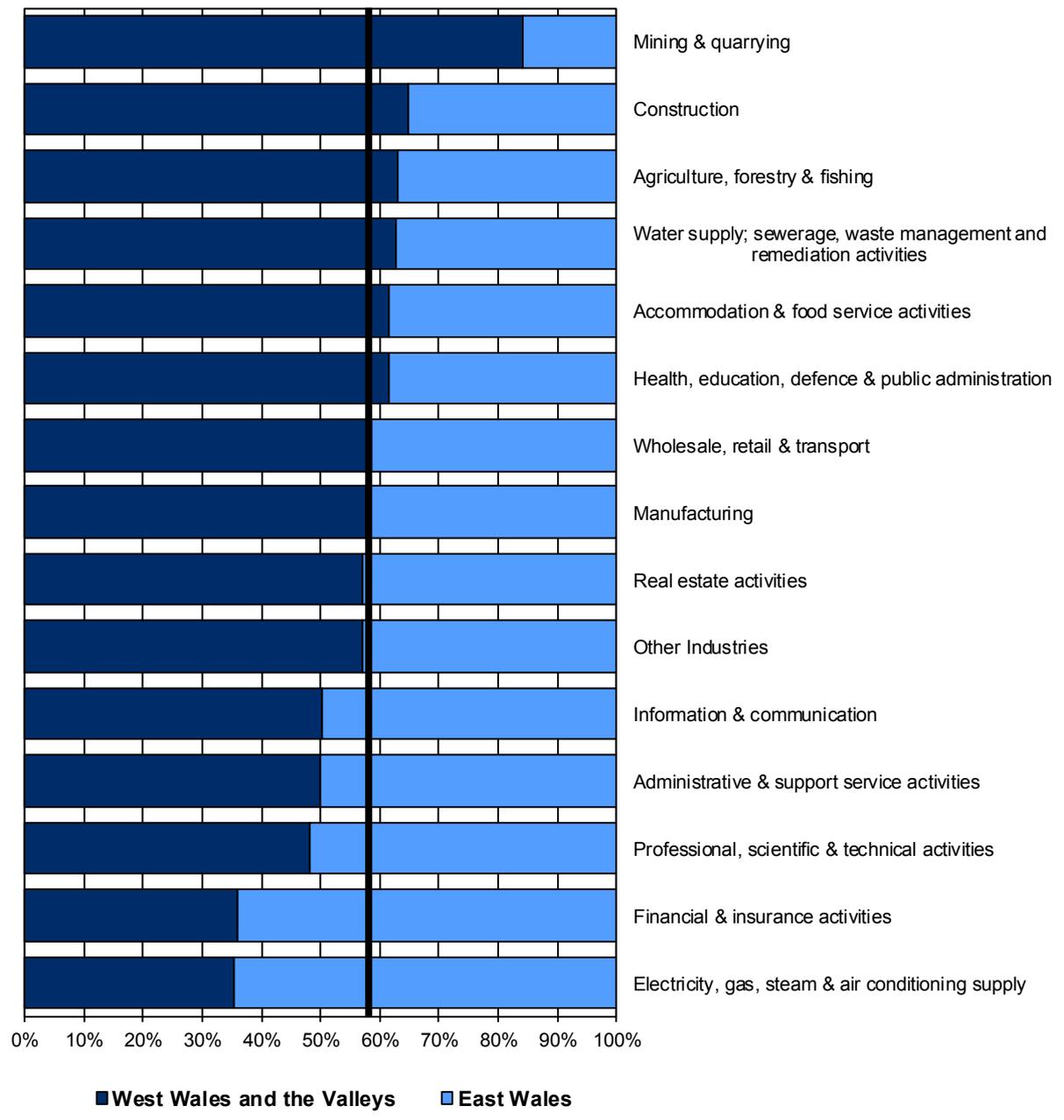
- In 2014, West Wales and the Valleys had a larger share of jobs in 3 of the 7 industry groupings, namely the public administration, defence, education, & health sector (which is *not* the same as the public sector); the wholesale, retail, transport, hotels & food sector; and the construction sector.
- East Wales had a larger share of jobs in 2 industry groupings, namely the finance & business activities sector and the production sector.
- The share was equal in the remaining 2 industry groupings; the other industries sector and the agriculture sector.

An alternative and more detailed analysis of the differences between workplace employment in the different industry sectors and NUTS2 areas of Wales is given in chart 7 below.

This chart looks at the share of jobs in each sector in 2014, located in the two NUTS2 areas of Wales. The line on the chart represents the share of total Welsh workplace employment in West Wales and the Valleys (58 per cent) and so reflects the all-industries average. Shares in excess of this line indicate industries that are more represented in West Wales and the Valleys than East Wales, and vice versa.

The chart shows significant variation by industry, ranging from 84 per cent of jobs in the mining & quarrying sector being located in West Wales and the Valleys, compared with just 35 per cent of jobs in the electricity, gas, steam and air conditioning supply sector.

**Chart 7: Share of workplace employment by Welsh NUTS2 areas and industry sector, 2014<sup>1</sup>**



1. See background note 6 for the definition of the NUTS2 areas in Wales. Also see note 11 for details of the methodology used in deriving these estimates and notes 14 and 15 for details of the coverage of these estimates.

**Table 2: Workplace employment by industry and Welsh NUTS2 areas<sup>1, (r)</sup>**

Area and industry	Numbers in thousands						
				Change in latest levels since: <sup>(2)</sup>		Percentage change in latest since: <sup>(2)</sup>	
	2001	2013	2014	2001	2013	2001	2013
<b>West Wales and the Valleys:</b>							
Agriculture, forestry & fishing	22	23	27	5	4	24%	15%
Mining & quarrying	2	2	2	-	-	-14%	1%
Manufacturing	114	82	88	-26	6	-23%	7%
Electricity, gas, steam & air conditioning supply	2	3	3	1	-	43%	3%
Water supply; sewerage, waste management & remediation activities	5	8	7	2	-1	39%	-15%
Construction	53	55	63	10	8	19%	14%
Wholesale & retail trade; repair of motor vehicles & motorcycles	128	118	115	-13	-3	-10%	-3%
Transportation & storage	27	26	27	-	-	1%	2%
Accommodation & food service activities	53	60	58	5	-1	9%	-2%
Information & communication	11	13	18	7	5	65%	38%
Financial & insurance activities	10	13	12	2	-2	16%	-12%
Real estate activities	6	10	13	6	2	105%	24%
Professional, scientific & technical activities	22	35	31	9	-4	39%	-11%
Administrative & support service activities	33	40	44	11	4	35%	9%
Public administration & defence; compulsory social security	45	54	54	9	-	20%	-1%
Education	71	82	84	13	2	19%	2%
Human health & social work activities	99	123	128	29	5	29%	4%
Arts, entertainment & recreation	17	25	21	4	-3	23%	-14%
Other industries	16	21	21	4	-	27%	-
<b>All industries</b>	<b>736</b>	<b>793</b>	<b>814</b>	<b>79</b>	<b>21</b>	<b>11%</b>	<b>3%</b>
<b>East Wales:</b>							
Agriculture, forestry & fishing	11	13	16	5	2	41%	18%
Mining & quarrying	1	-	-	-1	-	-71%	-11%
Manufacturing	79	60	65	-14	4	-18%	7%
Electricity, gas, steam & air conditioning supply	3	5	5	1	-	42%	3%
Water supply; sewerage, waste management & remediation activities	3	4	4	-	-	14%	-10%
Construction	32	34	34	2	-	5%	1%
Wholesale & retail trade; repair of motor vehicles & motorcycles	82	83	79	-3	-4	-4%	-5%
Transportation & storage	22	21	21	-1	1	-3%	3%
Accommodation & food service activities	31	38	36	6	-1	18%	-4%
Information & communication	14	14	18	4	4	28%	27%
Financial & insurance activities	16	19	21	5	2	28%	8%
Real estate activities	6	8	10	4	2	72%	23%
Professional, scientific & technical activities	21	38	33	13	-4	62%	-11%
Administrative & support service activities	31	37	44	13	7	43%	19%
Public administration & defence; compulsory social security	29	35	34	4	-2	14%	-5%
Education	44	51	50	7	-	15%	-
Human health & social work activities	67	82	81	14	-1	20%	-2%
Arts, entertainment & recreation	12	16	17	5	1	44%	7%
Other industries	12	14	14	2	-	15%	1%
<b>All industries</b>	<b>517</b>	<b>573</b>	<b>582</b>	<b>65</b>	<b>9</b>	<b>13%</b>	<b>2%</b>

Source: Annual Population Survey, Business Register and Employment Survey and Welsh Agricultural Census

1. See background note 6 for the definition of the NUTS2 areas, note 11 for details of the methodology used and notes 14 and 15 for details of the coverage of these estimates. The full series can be found at: <https://stats.wales.gov.uk/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Employment/Jobs/Whole-Workforce>

2. Data on levels is rounded to the nearest thousand; changes are based on unrounded data, then rounded to the nearest thousand, so may not sum.

(r) 2006-2013 data has been revised since the previous publication.

### **Between 2001 and 2014:**

- Both of the Welsh NUTS2 areas had increases in workplace employment with West Wales and the Valleys having a larger absolute increase, up 79 thousand (11 per cent) compared to a 65 thousand increase (13 per cent) for East Wales
- West Wales and the Valleys had increases in workplace employment in 16 of the 19 industry sectors, with the remaining 3 sectors having falls. East Wales had increases in 15 of the 19 industry sectors and falls in the remaining 4 sectors.
- In West Wales and the Valleys the human health & social work activities sector had the largest absolute increase (up 29,000, or 29 per cent) followed by the education sector (up 13 thousand or 19 per cent) and the administrative & support service activities sector (up 11 thousand or 35 per cent).
- In East Wales the human health & social work activities sector also had the largest absolute increase (up 14,000, or 20 per cent) followed by the professional, scientific & technical activities sector (up 13,000, or 62 per cent) and the administrative & support service activities sector (up 13,000 or 43 per cent).
- The manufacturing sector had the largest fall in both of the Welsh NUTS 2 areas, falling by 26 thousand (or 23 per cent) in West Wales and the Valleys and down 14 thousand (or 18 per cent) in East Wales.
- When looking at the percentage differences in the changes over this period, in West Wales and the Valleys workplace employment in real estate activities increased by the largest amount (105 per cent).
- Similarly in East Wales the largest percentage increase in workplace employment was in real estate activities, with a 72 per cent increase.

### **Between 2013 and 2014:**

- Workplace employment increased by 21,000 or 3 per cent in West Wales and the Valleys, whilst East Wales had a 9,000 or 2 per cent increase.
- Workplace employment increased in 11 of the 19 industry sectors in West Wales and the Valleys, 7 sectors had falls in and 1 sector remained little changed.
- Similarly, in East Wales, 11 of the 19 industry sectors increased, 7 sectors had falls and 1 sector was unchanged.
- The construction sector had the largest absolute increases in West Wales and the Valleys (up 8 thousand or 14 per cent) followed by the manufacturing sector (up 6 thousand or 7 per cent). The largest absolute fall was in the professional, scientific & technical activities sector (down 4 thousand or 11 per cent).
- In East Wales the largest absolute increase was in the administrative & support service activities sector (up 7 thousand or 19 per cent) followed by the manufacturing sector (up 4 thousand or 7 per cent) and the information & communication sector (up 4 thousand or 27 per cent). The largest absolute falls were in the professional, scientific & technical activities sector (down 4 thousand or 11 per cent) and the wholesale & retail trade; repair of motor vehicles & motorcycles sector (down 4 thousand or 5 per cent).
- In West Wales and the Valleys, 9 of the 19 industry sectors had increases both over 2001 and over 2013 whilst the wholesale & retail trade; repair of motor vehicles & motorcycles sector was the only industry sector to experience a fall both since 2001 and since 2013.
- Also in East Wales, 9 of the 19 industry sectors had increases both over 2001 and over 2013 (6 of these industry sectors also increasing over both periods in West Wales and the Valleys too). Of the remaining 10 industry sectors, 2 sectors had falls both over 2001 and over 2013.

## SECTION 3: WORKPLACE EMPLOYMENT FOR WELSH LOCAL AUTHORITIES

**Table 3: Workplace employment by Welsh local authority<sup>1, (r)</sup>**

Local authority areas	Numbers in thousands						
				Change in latest levels since: <sup>(2)</sup>		Percentage change in latest since: <sup>(2)</sup>	
	2001	2013	2014	2001	2013	2001	2013
<b>West Wales and the Valleys</b>	<b>736</b>	<b>793</b>	<b>814</b>	<b>79</b>	<b>21</b>	<b>11%</b>	<b>3%</b>
Isle of Anglesey	25	25	25	-	-	-1%	1%
Gwynedd	57	62	64	6	2	11%	3%
Conwy	42	45	44	3	-1	6%	-1%
Denbighshire	41	42	41	-	-1	-	-3%
Ceredigion	36	36	37	1	1	3%	4%
Pembrokeshire	49	56	54	5	-2	10%	-3%
Carmarthenshire	66	75	84	18	9	27%	12%
Swansea	107	118	124	17	6	16%	5%
Neath Port Talbot	43	47	51	7	3	17%	7%
Bridgend	56	68	63	7	-5	12%	-7%
Rhondda Cynon Taf	76	76	85	9	9	12%	12%
Merthyr Tydfil	22	24	25	3	-	13%	2%
Caerphilly	56	61	58	2	-3	4%	-5%
Blaenau Gwent	23	21	23	-1	2	-2%	8%
Torfaen	35	37	37	2	-	4%	-1%
<b>East Wales</b>	<b>517</b>	<b>573</b>	<b>582</b>	<b>65</b>	<b>9</b>	<b>13%</b>	<b>2%</b>
Flintshire	56	60	64	8	4	15%	7%
Wrexham	64	66	68	3	2	5%	2%
Powys	56	63	65	9	2	16%	2%
Vale of Glamorgan	41	39	41	-	1	-	3%
Cardiff	183	225	223	40	-2	22%	-1%
Monmouthshire	43	46	45	2	-1	5%	-2%
Newport	74	73	77	3	4	4%	5%
<i>North Wales</i>	286	300	306	20	6	7%	2%
<i>Mid Wales</i>	92	99	102	10	3	11%	3%
<i>South West Wales</i>	266	296	313	47	17	18%	6%
<i>South East Wales</i>	609	671	675	66	5	11%	1%
<b>Wales</b>	<b>1,253</b>	<b>1,366</b>	<b>1,397</b>	<b>144</b>	<b>31</b>	<b>11%</b>	<b>2%</b>
<b>United Kingdom</b>	<b>28,580</b>	<b>30,827</b>	<b>31,443</b>	<b>2,863</b>	<b>616</b>	<b>10%</b>	<b>2%</b>

Source: Annual Population Survey, Business Register and Employment Survey and Welsh Agricultural Census

1. See background notes 8 and 9 for details of the differences between the UK estimates presented here and ONS workforce jobs estimates. Also see background note 6 for the definition of the NUTS2 areas in Wales, note 11 for details of the methodology used in deriving these estimates and notes 14 and 15 for details of the coverage of these estimates. The full series can be found at: <https://stats.wales.gov.uk/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Employment/Jobs/Whole-Workforce>

2. Data on levels is rounded to the nearest thousand; changes are based on unrounded data, then rounded to the nearest thousand, so may not sum.

(r) 2006-2013 data has been revised since the previous publication.

### Between 2001 and 2014:

- Within Wales workplace employment increased in 18 of the 22 Welsh local authorities with Cardiff having the largest absolute increase in jobs (up 40 thousand or 22 per cent) followed by Carmarthenshire (up 18 thousand, or 27 per cent) and Swansea (up 17 thousand, or 16 per cent).
- Of the remaining 4 local authorities, both the Isle of Anglesey and Blaenau Gwent, experienced falls whilst the remaining 2 authorities, Denbighshire and the Vale of Glamorgan were little changed.
- All of the 4 economic regions in Wales had increases with South East Wales having the largest absolute increase (up 66 thousand, or 11 per cent) followed by South West Wales (up 47 thousand, or

18 per cent), North Wales (up 20 thousand, or 7 per cent) and Mid Wales (up 10 thousand, or 11 per cent).

#### **Between 2013 and 2014:**

- Workplace employment increased in 12 of the 22 Welsh local authorities with Carmarthenshire and Rhondda Cynon Taf having the largest absolute increase in jobs (both up 9 thousand).
- Of the remaining local authorities, 7 had falls in workplace employment and 3 were little changed. Bridgend and Caerphilly had the largest absolute falls, down 5 thousand (7 per cent) and down 3 thousand (5 per cent) respectively.
- All of the 4 Welsh economic regions had increases over the year, with South West Wales having the largest absolute increase (up 17 thousand, or 6 per cent), followed by North Wales (up 6 thousand or, 2 per cent), South East Wales (up 5 thousand, or 1 per cent) and Mid Wales (up 3 thousand, or 3 per cent).

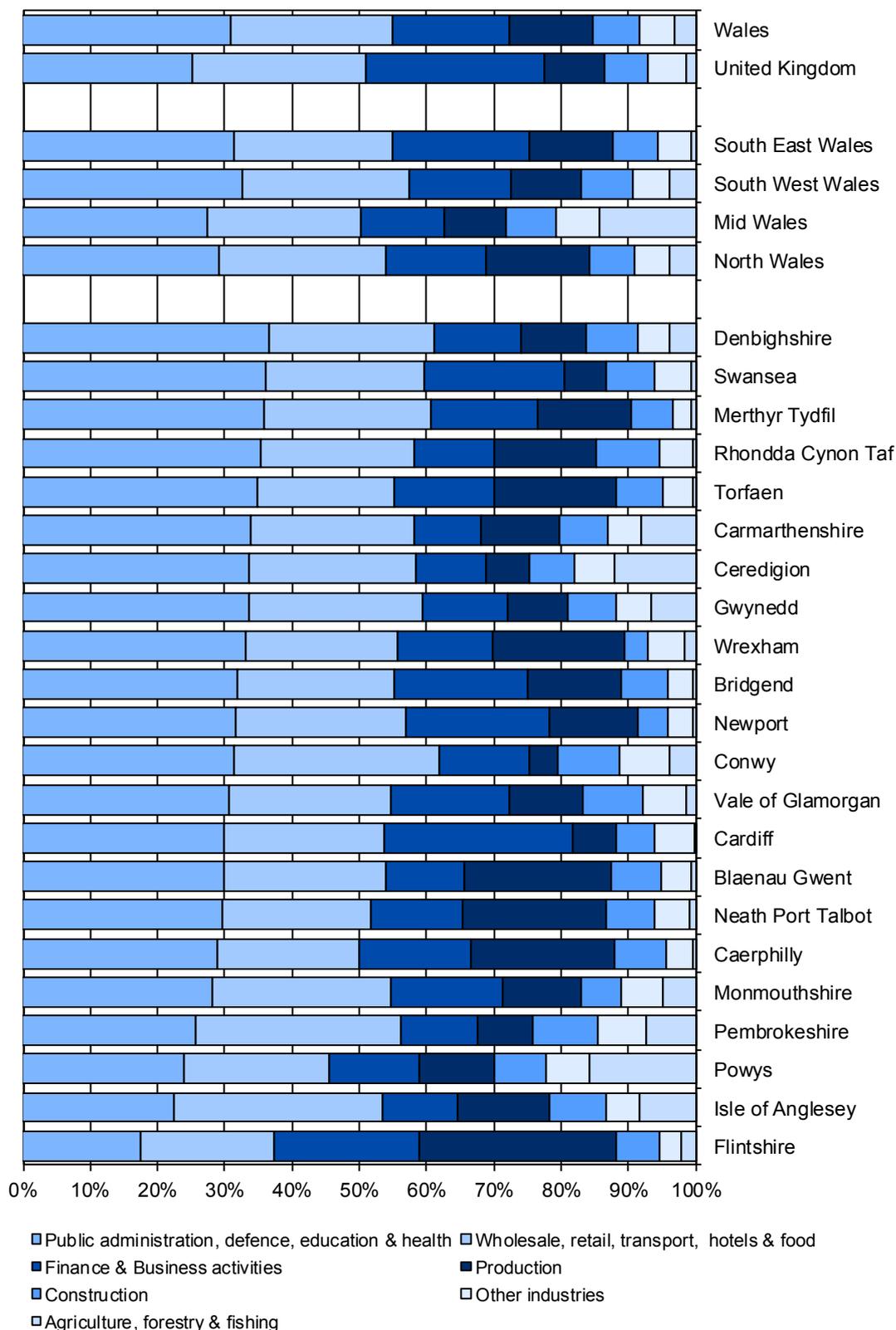
There are clear differences in the profile of jobs in the different local authority areas, with higher proportions of jobs in the agriculture sector in the more rural areas, and higher proportions of jobs in the production and construction and service sectors in the more urban areas.

This is shown in chart 8 over the page, which illustrates the shares of workplace employment in each of the 7 broad industry sectors for each of the Welsh local authority areas in 2014. Table 4, which follows chart 8, gives the numbers of jobs used to produce chart 8.

#### **In 2014:**

- At 37 per cent Denbighshire had the highest share of workplace employment in the public administration, defence, education & health sector (which is *not* the same as the public sector), followed by Swansea and Merthyr Tydfil (both 36 per cent). Flintshire had the lowest share (17 per cent). For Wales the share was 31 per cent; the UK share was 25 per cent.
- The Isle of Anglesey, Pembrokeshire and Conwy had the highest shares of workplace employment in the wholesale, retail, transport, hotels & food sector, all at 31 per cent. Whilst Torfaen and Flintshire had the lowest share (both 20 per cent). For Wales the share was 24 per cent; the UK share was 26 per cent.
- Cardiff had the highest share of workplace employment in the finance & business activities (28 per cent), followed by Flintshire (22 per cent). Ceredigion and Carmarthenshire had the lowest share (both at 10 per cent). For Wales the share was 17 per cent; the UK share was 26 per cent.
- Flintshire had the highest share of workplace employment in the production sector at 29 per cent followed by Blaenau Gwent (22 per cent). Conwy had the lowest share (4 per cent). For both Wales and the UK, the share was 12 per cent.
- Pembrokeshire had the highest share of workplace employment in the construction sector at 10 per cent, whilst Wrexham had the lowest share (3 per cent). For both Wales and the UK, the share was 7 per cent.
- Conwy had the highest share of workplace employment in the other service activities sector at 8 per cent, whilst Flintshire and Merthyr Tydfil had the lowest share (both 3 per cent). For Wales the share was 5 per cent; the UK share was 6 per cent.
- Powys had the highest share of workplace employment in the agriculture, forestry & fishing sector at 16 per cent, followed by Ceredigion at 12 per cent. This is in contrast with Cardiff, Newport, Rhondda Cynon Taf, Bridgend, Caerphilly and Torfaen which all had a share of 0 per cent. For Wales the share was 3 per cent; the UK share was 1 per cent.

**Chart 8: Percentage of workplace employment by industry and Welsh local authority, 2014<sup>1</sup>**



1. See background notes 8 and 9 for details of the differences between the UK estimates presented here and ONS workforce jobs estimates. Also see note 11 for details of the methodology used in deriving these estimates and notes 14 and 15 for details of the coverage of these estimates.

**Table 4: Workplace employment by industry and Welsh local authority 2014<sup>1</sup>**

*Numbers in thousands*

Local authority area	Agriculture, forestry & fishing	Production	Construction	Wholesale, retail, transport, hotels & food	Information & communication	Financial & insurance activities	Real estate activities	Professional, scientific and technical activities; administrative & support service activities	Public administration, defence, education & health	Other service activities	<b>All industries</b>
	<b>West Wales and the Valleys</b>	<b>27</b>	<b>99</b>	<b>63</b>	<b>200</b>	<b>18</b>	<b>12</b>	<b>13</b>	<b>75</b>	<b>266</b>	<b>42</b>
Isle of Anglesey	2	3	2	8	-	-	-	2	6	1	25
Gwynedd	4	6	5	16	2	1	1	4	21	3	64
Conwy	2	2	4	14	1	1	1	4	14	3	44
Denbighshire	2	4	3	10	1	-	1	3	15	2	41
Ceredigion	4	2	3	9	-	-	1	3	13	2	37
Pembrokeshire	4	5	5	17	1	-	1	4	14	4	54
Carmarthenshire	7	10	6	21	1	1	1	6	28	4	84
Swansea	1	8	9	29	4	4	2	15	45	7	124
Neath Port Talbot	-	11	4	11	1	-	1	4	15	3	51
Bridgend	-	9	4	15	2	1	1	9	20	2	63
Rhondda Cynon Taf	-	13	8	19	1	1	1	7	30	4	85
Merthyr Tydfil	-	3	2	6	1	-	-	2	9	1	25
Caerphilly	-	12	4	12	1	1	1	7	17	2	58
Blaenau Gwent	-	5	2	5	-	-	-	2	7	1	23
Torfaen	-	7	3	8	1	-	1	3	13	2	37
<b>East Wales</b>	<b>16</b>	<b>74</b>	<b>34</b>	<b>136</b>	<b>18</b>	<b>21</b>	<b>10</b>	<b>77</b>	<b>165</b>	<b>32</b>	<b>582</b>
Flintshire	1	19	4	13	2	1	1	10	11	2	64
Wrexham	1	13	2	15	2	1	-	7	22	4	68
Powys	10	7	5	14	1	-	1	6	16	4	65
Vale of Glamorgan	1	4	4	10	1	-	1	5	12	3	41
Cardiff	-	14	13	53	8	15	3	36	67	13	223
Monmouthshire	2	5	3	12	1	1	1	4	13	3	45
Newport	-	10	3	19	3	3	2	9	24	3	77
<i>North Wales</i>	12	47	20	76	8	4	4	30	90	15	306
<i>Mid Wales</i>	15	10	8	23	2	1	2	9	28	6	102
<i>South West Wales</i>	12	33	24	78	7	6	5	29	102	17	313
<i>South East Wales</i>	4	83	45	160	19	22	11	85	211	34	675
<b>Wales</b>	<b>43</b>	<b>173</b>	<b>97</b>	<b>337</b>	<b>36</b>	<b>32</b>	<b>22</b>	<b>153</b>	<b>431</b>	<b>73</b>	<b>1,397</b>
<b>United Kingdom</b>	<b>415</b>	<b>2,816</b>	<b>2,077</b>	<b>8,104</b>	<b>1,325</b>	<b>1,069</b>	<b>519</b>	<b>5,412</b>	<b>7,923</b>	<b>1,784</b>	<b>31,443</b>

Source: Annual Population Survey, Business Register and Employment Survey and Welsh Agricultural Census

1. See background notes 8 and 9 for details of the differences between the UK estimates presented here and ONS workforce jobs estimates. Also see background note 5 for the definition of the NUTS2 areas in Wales, note 11 for details of the methodology used in deriving these estimates and notes 14 and 15 for details of the coverage of these estimates. The full series can be found at: <https://stats.wales.gov.uk/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Employment/Jobs/Whole-Workforce>

## NOTES

### Revisions and planned changes to the bulletin

#### *This year's bulletin:*

The Office for National Statistics (ONS) have reweighted the Annual Population Survey (APS) to take account of population data from the 2011 Census. Therefore, data for 2006-2013 has been revised in this bulletin.

#### *Next year's bulletin:*

There are no planned changes.

### Background

1. The main purpose of this bulletin is to provide workplace employment estimates, or estimates of total jobs, for Wales and its sub-regions, disaggregated by broad industry grouping. As well as this, the data in this bulletin also allows estimates of productivity to be produced as the industrial split is consistent with that of the regional accounts.
2. The Business Register and Employment Survey (BRES – formerly the Annual Business Inquiry (ABI)) conducted by the ONS has long provided the means for disaggregation of *employee* jobs into industry groupings and detailed geographical breakdowns. However, BRES is more suited to cross-sectional analysis than it is for comparisons over time, and it covers employee jobs and working proprietors only.
3. Like both BRES and the previous bulletins, this bulletin also allows for analysis at a sub-Wales level, down to local authority level. Thus, this bulletin provides estimates of total jobs over time by both industry and local authority in Wales, and therefore represents an improvement over BRES in analysing the labour market from an industrial perspective.
4. In deriving estimates of workplace employment by industry for Wales and its sub-regions, this bulletin makes use of a number of data sources, predominantly the APS (previously the Local Labour Force Survey or LLFS), and also BRES and the Welsh Agricultural Census.
5. The Welsh sub-regional breakdowns of the data given in this bulletin are at NUTS2 and local authority levels. Nomenclature of Units for Territorial Statistics (NUTS) is an EU hierarchical geographic breakdown of member states. NUTS1 defines the regions of UK (of which Wales is one), whilst NUTS4 defines local authorities, with NUTS2 and NUTS3 representing successive hierarchical aggregations of local authorities. Within Wales, there are 2 NUTS2 areas, namely 'West Wales and the Valleys' and 'East Wales', the former being the area of Wales currently eligible for Convergence funding from the European Union. The local authorities which make-up the two NUTS2 areas in Wales are shown in tables 3 or 4.
6. The industry breakdown applied to the data is based on the Standard Industrial Classification (SIC) 2007. As the sub-Wales detail is increased, greater aggregation of the industry detail is performed, to ensure that the data presented are robust. The industry sectors used for Wales data are relatively detailed and self-explanatory, whilst at the local authority level, there are ten broad industry sectors, which cover agriculture, forestry and fishing (section A), production (sections B, C, D and E), construction (section F), Wholesale, retail, transport, hotels and food (sections G, H and I), Information and communication (section J), financial and insurance activities (section K), real estate activities (section L), professional, scientific and technical activities; administrative and support service activities (sections M and N) and public administration, defence, education and health (sections O, P and Q) and other service activities (sections R to U). Industry detail shown for the NUTS2 areas is at the same level of detail as that shown at the Wales level. As noted in SB 70/2011 "Workplace employment by industry in Wales, 2001 to 2009", the back series of data prior to 2008 has been converted to SIC 2007 from SIC 2003; <http://gov.wales/statistics-and-research/workplace-employment-industry/>
7. The UK estimates of workplace employment by industry within this bulletin have been derived in the same way as the estimates for Wales and its sub-regions *purely* to provide a consistent

comparator for the Wales estimates of jobs by industry. This means that they differ from the estimates of workforce jobs by industry in the UK and Wales as published by the ONS, which are derived from a different methodology, based mainly on employer sources.

8. Therefore, the UK estimates should not be used for any purpose other than to provide a comparison with the estimates for Wales presented here. The ONS' estimates of UK workforce jobs can be found in table 5 of the latest ONS UK labour market release:  
<http://www.ons.gov.uk/ons/publications/all-releases.html?definition=tcm:77-21589>  
and should be used in preference to the UK estimates given here unless making comparisons with the estimates for Wales presented here.
9. The data given in this bulletin are rounded independently to the nearest thousand jobs and so the totals given may not add to the sum of their constituent parts.

### **Key quality information: methodology**

10. The methodology used to derive workplace employment by industry for Wales and its sub-regions (and also the comparable UK estimates) can be listed as a series of distinct steps, as set out below.
  - Data for the numbers of first and second employee jobs by Welsh local authority of workplace, and for the UK as a whole, are extracted from the annual LLFS/APS datasets for 2001 onwards. These are added together to give total employee jobs by Welsh local authority of workplace and for the UK as a whole.
  - For each area, the employee jobs totals derived above are broken down into industry sections by pro-rating the totals using industry level data for each area from BRES (ABI prior to 2009). [Note that although agriculture data at a Wales level are complete within the BRES dataset, agriculture data at a local authority level are not. Thus figures from the Welsh Agricultural Census for each year have been used to apportion the Wales agriculture data between Welsh local authorities to derive a complete BRES dataset by industry and local authority.]
  - The NUTS2 totals and Wales totals for employee jobs by industry within the data are derived by summing up the estimates for the relevant local authorities.
  - Data for the numbers of first and second self-employed jobs by industry and Welsh local authority of workplace (and for the UK as a whole) are extracted from the annual LLFS/APS datasets for 2001 onwards. These are added together to give total self-employed jobs by industry and Welsh local authority of workplace (and for the UK as a whole).
  - Again the NUTS2 totals and Wales totals for self-employed jobs by industry within the data are derived by summing up the estimates for the relevant local authorities.
  - Finally, the small number of government supported trainee figures are extracted from the annual LLFS/APS datasets for 2001 onwards for each area and apportioned between industries according to the estimates of employee jobs plus self-employment jobs by industry for each area. These estimates of government supported trainees are then added to the figures for employee jobs by industry and self-employment jobs by industry to give workplace employment by industry for each area represented in the data.
11. In summary, the methodology is based on results from the annual LLFS/APS to provide estimates of all jobs in the economy, broken down by local area in Wales, with mainly BRES data (ABI data prior to 2009) used to break down the employee element of these data by industry. This is consistent with Recommendation 1 in the National Statistics Quality Review of Employment and Jobs Statistics (NSQR Series Report No.44: <http://www.ons.gov.uk/ons/guide-method/method-quality/quality/quality-reviews/theme/labour-market/nsqr-44/nsqr-series-report-no-44--review-of-employment-and-jobs-statistics-.pdf>, published by ONS in January 2006, which sets out the appropriate sources to be used in measuring the structure of different aspects of the UK workforce.

## Key quality information: coherence with other sources

### i) Headline estimates of employment

12. There are four main reasons why the workplace employment data published here and the headline measure of persons in employment differ (the headline measure for Wales can be found in the latest ONS labour market release for Wales at <http://www.ons.gov.uk/ons/rel/subnational-labour/regional-labour-market-statistics/index.html>). These reasons are set out below.

- The data in this bulletin are measured on a workplace basis, that is, the data shows a count of jobs in workplaces located in each area, whereas the headline measure of employment is a count of employed residents in each area. A key difference between a count of jobs on a workplace basis in a given area and a count of employed residents of that area is the effect of commuting between areas. It is estimated that in 2014 around 83,700 Welsh residents work in jobs located outside Wales, and around 52,100 non-Welsh residents work in jobs located inside Wales. Thus Wales is a net exporter of employment, and there are many similar flows between the different local authorities within Wales.
- As some employed residents have more than one job, the headline measure of employment will be lower than the count of jobs. There were around 62,000 second jobs in Wales and around 1.2 million second jobs across the UK as a whole in 2014.
- The LLFS/APS data used in this bulletin are taken from the annual LLFS/APS datasets. For Wales, these are made up of the relevant quarterly Labour Force Survey datasets (from which the headline measure is taken), plus additional annual samples of households which allow for much more detailed analysis within Wales than would be available from the quarterly datasets alone. The analysis in this bulletin would not be possible without reference to these annual datasets. There are some small differences between estimates derived from the annual datasets and the quarterly datasets probably arising from their different wave structures. Nevertheless, the annual datasets are internally consistent and consistent over time so that comparisons drawn between the different domains within the data are appropriate.
- The headline measure of persons in employment includes around 8,300 unpaid family workers in the APS for 2014 across Wales and around 119,000 across the UK. These are not recorded when counting workplace employment.

### ii) Workforce jobs estimates

The workforce jobs series by the ONS includes a full breakdown by industry (on SIC 2007) The workforce jobs series continues to only provide industry data at a Wales level, so this bulletin remains the only official source of jobs by industry and local authority for Wales.

- The ONS produce quarterly estimates of workforce jobs by industry (which can be found in the labour market regional bulletin, tables 4 and 5). These estimates are based on employer's surveys and have self employment added to them based on the Labour Force Survey (LFS) plus HM Forces and Government Support Trainees. These estimates are not available by industry below a Wales level and due to the methodology used show different levels than the estimates in this bulletin. More information on the methodology can be found here: <http://www.ons.gov.uk/ons/guide-method/method-quality/quality/quality-information/labour-market/summary-quality-report-for-workforce-jobs.pdf>



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**Table A – Comparison of workplace employment (WPE) to workforce jobs (WFJ), 2014**

*Thousands and Per cent*

	Workplace Employment (000s)	Workforce Jobs (000s)	Difference WFJ- WPE (000s)	% Total difference (WFJ-WPE) as % of WFJ
	Welsh Government	ONS		
<b>Wales</b>				
Employees	1,173.6	1,209.0	35.5	2.9
Self-employed	212.9	205.3	-7.6	-3.7
Government-supported trainees	10.2	4.1	-6.1	-148.8
HM Forces	..	2.7	2.7	100.0
<i>Total</i>	<i>1,396.6</i>	<i>1,421.2</i>	<i>24.6</i>	<i>1.7</i>
<b>UK</b>				
Employees	26,372.4	28,642.3	2,270.0	7.9
Self-employed	4,954.8	4,516.9	-437.9	-9.7
Government-supported trainees	116.2	19.8	-96.4	-486.9
HM Forces	..	163.9	163.9	100.0
<i>Total</i>	<i>31,443.4</i>	<i>33,342.9</i>	<i>1,899.5</i>	<i>5.7</i>

.. Not Applicable

- The key differences between the workforce jobs by industry series and the workplace employment series can be explained through differences in the underlying data sources and the methodology used. For example for self employment the workplace employment series uses the Annual Population Survey, whilst the workforce jobs series uses the Labour Force Survey. There is a difference between these two sources which could be accounted for by sampling variability.
- The largest difference between the two data sources is in the employees' component. Whilst the estimates in this bulletin are constrained to the APS totals, the Workforce jobs series are not. The ONS publish in their labour market overview a table comparing workforce jobs to the Labour Force Survey investigating the differences between the two sources. This explains the differences in the employee components above and can be found here: <http://www.ons.gov.uk/ons/publications/all-releases.html?definition=tcm:77-21589>
- The above link highlights the differences between the LFS and workforce jobs series at a UK level. The ONS identifies 30 reasons why this occurs, including sampling variability and timing of the datasets. Other key points to note are that:
  - The workforce jobs series has some issues with double-counting due to over-reporting of self-employment.
  - Workforce jobs data contains HM Forces data whilst the LFS only contains armed forces employee jobs living in private households.
  - The LFS only captures those with first and second jobs, excluding those with third and subsequent employee jobs.
  - The LFS contains information on unpaid family workers, and a greater number of government-supported trainees than the workforce jobs data.
- The ONS also publish total jobs in their jobs density estimates (which can be found in the labour market regional bulletin, table 12). These estimates differ from those shown in this bulletin as they are based on the same methodology as the quarterly estimates of workforce jobs and include HM Forces.

**Table B – Comparison of workforce jobs (WFJ) workplace employment (WPE), by industry, 2014**

	<i>Thousands</i>			
	Total	Employee Jobs	Self Employed	Government Supported Trainees
A:Agriculture, forestry and fishing	-3.6	-0.2	-3.3	-0.1
B:Mining and quarrying	-0.2	-0.1	-0.1	0.0
C:Manufacturing	3.1	4.6	-0.6	-0.9
D:Electricity, gas, steam and air conditioning supply	-0.3	-0.8	0.6	-0.1
E:Water supply; sewerage, waste management and remediation activities	1.5	1.7	-0.1	-0.1
F:Construction	2.1	-1.0	3.5	-0.4
G:Wholesale and retail trade; repair of motor vehicles and motorcycles	16.6	21.9	-4.7	-0.6
H:Transportation and storage	0.3	-2.1	2.7	-0.3
I:Accommodation and food service activities	0.8	2.2	-0.9	-0.6
J:Information and communication	-7.3	-5.5	-1.6	-0.2
K:Financial and insurance activities	0.0	-0.5	0.7	-0.2
L:Real estate activities	-0.5	1.2	-1.6	-0.1
M:Professional, scientific and technical activities	-0.4	3.5	-3.5	-0.3
N:Administrative and support service activities	-0.2	-3.3	3.6	-0.5
O:Public administration and defence; compulsory social security	1.0	0.2	-1.3	-0.6
P:Education	7.4	6.9	1.1	-0.7
Q:Human health and social work activities	3.6	3.8	0.3	-0.5
R:Arts, entertainment and recreation	-2.5	0.9	-3.2	-0.1
STU: Other industries	3.0	2.1	0.8	0.1
<b>Total</b>	<b>24.6</b>	<b>35.5</b>	<b>-7.6</b>	<b>-6.1</b>

*A larger figure shows that workforce jobs estimates by the ONS are higher than workplace employment estimates by the WG. This table excludes HM Forces (which would fall under section O).*

### Key quality information: coverage and accuracy

13. As the APS is a survey of only private households, any jobs held by residents of communal establishments will be excluded. The main impact of this is that HM forces jobs where the job-holders are usually resident on a base or ship will be excluded, although forces jobs where the job-holders live in private households will be included. It is not possible to identify whether HM forces personnel live on bases or ships from the data readily available from the Ministry of Defence.
14. Although second jobs are covered by the estimates in this bulletin, no account is taken of third and any subsequent jobs that an individual may hold, as no such information is available from the APS.
15. The estimates of workplace employment jobs published here are generated from a number of sources, so it is difficult to calculate direct measures of the quality of the estimates. However, given that the results are heavily based on the annual APS datasets, which themselves are derived from a sample of approximately 18,000 people of working age across Wales, with a minimum of around 600 people aged 16-64 in most local authorities in Wales, then it is reasonable to conclude that the estimates presented here are fit for purpose in analysing the industrial structure of the workplace employment across Wales and its sub-regions.

### Accessing the data

16. All the data given in this bulletin can be found on StatsWales, via the following link <https://statswales.wales.gov.uk/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Employment/Jobs/Whole-Workforce>