Summary statistics for Welsh economic regions: Wales

30 May 2019
SFR 37/2019

Statistical data is used widely to support regional planning across Wales. This series of releases brings together in one place key data on the economy, population and infrastructure in Wales to meet user needs for data on the three Welsh economic regions (North Wales, Mid and South West Wales, and South East Wales).

The aim of this release is to provide context to the individual regional releases and to highlight differences that exist between the three regions for the nine topics in question.

Although this release is split into chapters, it is important to remember that there is interaction between the various topics and when using the information for planning the data should be put into context.

Differences between parts of Wales can often be down to the demographic or socio-economic characteristics of a region. For example, levels of economic activity are influenced more by qualification levels than where a person lives. An older, less economically active, population in an area will influence levels of economic output per head.

Demographic trends vary across Wales in terms of age distribution and natural change, leading to differences in future population and housing trends across and within the regions.

Geographical context is also important, for example in considering data on infrastructure, either physical or digital. The interconnectedness with the rest of the UK means our economic performance is closely linked to UK and global trends, and in many border areas commuting levels will impact on some measures of economic output.

About this release
This release is one of four statistical outputs providing statistics for Wales and each of the three regions as defined in the Economic Action Plan, for nine key themes. Together these releases have been prepared to inform regional planning, supporting the National Infrastructure Commission for Wales, the National Development Framework and the Economic Action Plan.

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In 2017, Wales was home to **over 3,125,000 residents**. Almost half of these were concentrated in South East Wales, which represents only 14 per cent of Wales’ land area.

The most populated authority in Wales is, by some way, Cardiff, with an estimated 363,000 residents in 2017, representing nearly 24 per cent of the population of its region, South East Wales. This region also included the authority with the smallest population in Wales, Merthyr Tydfil, with a population of around 60,000.

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1. StatsWales: Population estimates by local authority and year
In 2017, Wales had an average population density\(^2\) of 150.7 persons per square kilometre; this is a 4.0 per cent increase since 2007. South East Wales had by far the highest population density of the three regions, at 542.6 persons per square kilometre. This can largely be attributed to Cardiff, which was the most densely populated authority in Wales at 2,574.6 persons per square kilometre. The region also saw the most growth in population density over the last decade, up 5.4 per cent on 2007.

Mid and South West Wales was the least densely populated of the three regions, with only 76.8 persons to each square kilometre. 4 of the 5 most sparsely populated authorities in Wales were in this region. This was also the region with the least densely populated local authority in Wales, which was Powys, at 25.6 persons per square kilometre. The lowest rate of change in population density in the 2007-2017 period was in North Wales, at 2.5 per cent.

\(^2\) StatsWales: Population density (persons per square kilometre) by local authority and year
Welsh Government analysis of 2011 Census data (unpublished) shows that while there are fairly even numbers of people living in each category of settlement in Wales (as defined by population), the distribution of these different categories of settlements across Wales is not even.

As well as the settlement's population, the National Statistics rural-urban classification considers whether settlements are situated in a “less sparse” or “sparsest” context. The distribution of Welsh settlements falling under these two categories is shown on the map.

At a regional level, the highest number and proportion of the population living in less sparse settlements with 25,000 or more residents was in South East Wales. Mid & South West Wales had the highest number and proportion of residents living in settlements classified "sparsest".

Background information on this work can be found in the Best fit of Lower Super Output Layers to built up areas\(^3\) and in the Rural Wales: definitions and how to choose them\(^4\) releases.

\(^3\) [Welsh Government: Best fit of Lower Super Output Layers to built up areas](#)

\(^4\) [Welsh Government: Rural Wales: definitions and how to choose them](#)
Wales as a whole has an ageing population\textsuperscript{5}. Between 1997 and 2017, the proportion of the population aged 65 and over\textsuperscript{6} has increased from 17 per cent to 21 per cent, while the proportion of the population aged 15 and under has fallen from 21 per cent to 18 per cent. Of the three regions, South East Wales has the most even population distribution across its age groups. Across Wales, for each year of age between 18 and 30, there are more males than females. However, males are outnumbered by females at each age after the age of 40.
Wales’ population grew\(^7\) by 8.0 per cent in the period 1997-2017. This was lower than in England and in Northern Ireland, but higher than in Scotland. When considering the 2007-2017 period, however, the percentage change in population in Wales was the lowest in the UK, at 4.0 per cent.

Within Wales, the South East Wales region saw the largest population growth between 1997 and 2017, at 9.1 per cent. The lowest was North Wales, at 6.3 per cent. Over the 2007-2017 period, Cardiff’s population grew more than any other local authority in Wales (10.5 per cent). Ceredigion’s population, however, contracted by 3.0 per cent over the same period. This was the greatest population contraction in Wales.

\(^7\) StatsWales: Population estimates by local authority and year
Figure 6: Components of population change in Wales over time

Source: Mid-year population estimates, Office for National Statistics

Data showing components of population change\(^8\) across Wales shows that more population change is attributable to net migration and other changes than to natural change (births and deaths). Since 1991, net migration and other changes have been strictly positive, while natural change has fluctuated between positive and negative effects. Looking at local authorities, Vale of Glamorgan saw the largest net change in population due to migration and other changes during the 2016-17 period, while Newport saw the largest overall net change in population over the same period. Population change due to net migration and other changes was positive in all authorities during this period, except in Ceredigion. Cardiff was the local authority with the highest level of natural change in 2016-17, while 14 of the 22 authorities experienced negative natural change, meaning deaths were higher than births. The highest level of negative natural change was in Conwy.

\(^8\) StatsWales: Components of population change, by local authority and component
Across Wales\(^9\), the population is projected to increase by 2.7 per cent over the 2018-2028 period, and 3.6 per cent over the 2018-2038 period. Local authority population\(^{10}\) projections indicate that South East Wales should experience the greatest percentage population growth by 2028, with Mid and South West Wales projected to grow the least.

Figures quoted are based on the principal population projections. However, a number of variant projections are also produced which provide other future scenarios based on alternative assumptions of future fertility, mortality, and migration. These do not represent upper or lower bounds, but do illustrate what the population could look like if, for example, fertility were to become lower than assumed for the principal projection.

Further information on 2014-based local authority population projection variants can be found accompanying the Local authority population projections release\(^{11}\).

Further information on 2016-based national population projection variants can be found on the ONS website\(^{12}\).

Please note that these 2016-based national\(^{13}\) and 2014-based local authority projections\(^{14}\) are based on past data, and should not be viewed as a forecast.

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\(^9\) StatsWales: National population projections (2016-based)
\(^{10}\) StatsWales: Population projections by local authority and year (2014-based)
\(^{11}\) Welsh Government: Local authority population projections
\(^{12}\) ONS: National Population Projections: 2016-based statistical bulletin
\(^{13}\) StatsWales: Population projections by year and age (2016-based)
\(^{14}\) StatsWales: Population projections by local authority and year (2014-based)
The population of adults aged 65 and over in Wales is projected to grow at a higher rate than the total population over the next ten years, with a projected 763,900 persons aged 65 and over by 2028. This is an increase of 17.0 per cent on the projected figure for 2018. By 2038, this figure is projected to increase to 866,600, an increase of 32.8 per cent on the projected figure for 2018. This data is based on the national 2016-based projections, and should not be viewed as a forecast.


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15 Projections for Welsh regions are based on 2014 projections; projections for all other regions are based on 2016 projections
16 Nomis, ONS
17 StatsWales: Population projections by year and age (2016-based)
Figure 9: Percentage change in projected population of persons aged 65 and over, by local authority, 2018-2038 (based on 2014 projections)

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

2014-based projections\footnote{StatsWales: Population projections by local authority and year (2014-based)} for local authorities in Wales show that in each authority, the population of adults aged 65 and over is projected to grow at a higher rate than the total population by 2038. Looking at local authorities in Wales, the projected growth rate is highest in Cardiff and Monmouthshire.
According to census data, there were 562,016 Welsh-speakers aged three and over in Wales in 2011. 27 per cent of Welsh speakers were based in South East Wales, 36 per cent in North Wales, and 37 per cent in Mid & South West Wales. However, the distribution of Welsh speakers across the regions was less even when considered as a proportion of the population (Figure 10).

The census is the key source of information about the number of people who can speak Welsh. The National Survey for Wales (NSW) and the Annual Population Survey (APS) also collect information about Welsh speaking ability and frequency of use (the NSW only collects information for those aged 16 or over while the APS collects information for those aged three and over like the census). Estimates of Welsh language ability from household surveys are historically higher than those produced by the census and it is not known exactly why this is the case. It's likely that differences in how these surveys and the census are carried out affect the estimates. More information can be found in a blog post by the Chief Statistician discussing Welsh language data.

Data from the Annual Population Survey shows that in the year ending June 2018, an estimated 29.3 per cent of people aged three and over across Wales reported being able to speak Welsh. This represented an increase of approximately 3.5 percentage points on the data for the year ending June 2008. The local authority with the highest proportion of Welsh speakers was Gwynedd, where around 76.4 per cent of residents aged three and over reported being able to speak Welsh in 2018.

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19 StatsWales: Welsh speakers by local authority, gender and detailed age groups, 2011 census
20 Chief Statistician’s update: a discussion about the Welsh language data from the Annual Population Survey
21 StatsWales: Annual Population Survey estimates of persons aged 3 and over who say they can speak Welsh by local authority and measure
In 2016-17, there were nearly 137,500 enrolments on Higher Education (HE) courses in Wales. Almost half of all enrolments were in South East Wales. Cardiff University saw the highest number of HE enrolments, representing almost 25 per cent of total enrolments. North Wales was the region with the lowest number of enrolments for HE courses in its institutions (19,850 enrolments). Please note that percentages have been calculated from published rounded figures.\footnote{StatsWales: Student enrolments in Wales by institution, level and mode of study}
Health

Figure 12: Healthy life expectancy in Wales as a proportion of life expectancy, by gender, 2015-17

Source: Health state life expectancies, UK Statistical bulletins, Office for National Statistics

Life expectancy is a measure of how long, on average, people can expect to live using estimates of the population and the number of deaths. Healthy life expectancy estimates the number of years spent in very good or good general health.

ONS data\(^{23}\) shows that across Wales, females born in 2015-17 were expected on average to live almost 4 years longer than males. For females the figure is 82.2 years, for males it is 78.3 years. The gender gap narrows when considering healthy life expectancy in Wales, with females and males spending on average 75.4 per cent and 78.4 per cent of their respective life expectancies in good health.

Life expectancy figures for Wales were lower than the UK averages over this period (82.9 years for females and 79.2 years for males).

Monmouthshire had the highest life expectancy in Wales for males (80.3 years), and Ceredigion and Powys jointly had the highest female life expectancy (84.2 years). Ceredigion also had the highest male healthy life expectancy (67.4 years), while this was highest for females in Powys (68.9 years). Blaenau Gwent was the authority with the lowest life expectancy and healthy life expectancy for both males and females across Wales. Healthy life expectancy was below 60 years in 6 local authorities for men, all of which were in South East Wales, and 6 local authorities for women, of which 4 were in South East Wales, and 2 were in Mid & South West Wales. The range of the percentage of life expectancy in good health across all authorities was 14.1 percentage points for females and 13.9 percentage points for males.

\(^{23}\) ONS: Health state life expectancies, UK: 2015 to 2017
Figure 13: Adults aged 16 and over showing 0 or 1 healthy behaviours, by local authority, 2016-17 and 2017-18* (age standardised)

*The 2016-17 and 2017-18 periods have been combined for data quality purposes

Source: National Survey for Wales

Across Wales, 10 per cent of adults aged 16 or over showed 0 or 1 healthy lifestyle behaviours\textsuperscript{24,25}. There was no significant difference between the 3 regions in the proportion of adults aged 16 or over reporting low levels of healthy lifestyle behaviours. When considering this data at local authority level, Merthyr Tydfil and Caerphilly both had 16 per cent of adults aged 16 or over showing 0 or 1 healthy behaviours during this period, the highest proportion in Wales. Ceredigion, Monmouthshire and Powys all had the lowest proportion at 7 per cent.

Across Wales, 71 per cent of adults aged 16 and over reported they were in good or very good general health in 2016-17 and 2017-18 combined. This proportion was highest in North Wales (74 per cent). Breaking the data down by local authority, at 77 per cent, Gwynedd has the highest level of self-reported good or very good general health whilst Blaenau Gwent had the lowest proportion, at 64 per cent.

\textsuperscript{24} where healthy behaviours are not smoking, average weekly alcohol consumption 14 units or lower, eating at least 5 portions fruit & veg the previous day, having a healthy body mass index, and being physically active at least 150 minutes the previous week

\textsuperscript{25} National Survey for Wales: population health
Employment

<table>
<thead>
<tr>
<th>Employment rate (population aged 16-64)</th>
<th>Unemployment rate (population aged 16 and over)</th>
<th>Economic inactivity rate (population aged 16-64)</th>
</tr>
</thead>
<tbody>
<tr>
<td>72.6%</td>
<td>4.8%</td>
<td>20.0%</td>
</tr>
</tbody>
</table>

Source: Annual Population Survey, data for year ending 30 June 2018

Figure 14: Employment rate in Wales, 1999-2018

Notes

Data for 1999 to 2004 is year ending 28 February. Data from 2005 onwards for the year ending 30 June.

Source: Annual Population Survey

The employment level is the total number of people (aged 16+) that are in employment and the employment rate\(^{26}\) is the percentage of the population (aged 16-64) that is in employment. In Wales in the year ending 30 June 2018, the employment rate was 72.6 per cent, with an employment level of around 1.45 million people. This rate increased by 3.2 percentage points since 2008 and has grown faster than the UK rate since 2001, although it is still lower than the UK rate of 74.9 per cent. At a regional level, Mid & South West Wales and South East Wales fell below both the UK and the Welsh employment rates, while North Wales exceeded both.

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\(^{26}\) StatsWales: Employment rate by Welsh local area, year and gender
The unemployment level is the total number of people who are unemployed and the unemployment rate\textsuperscript{27} is the percentage of the economically active population who are unemployed (using the International Labour Organisation’s (ILO) definition of unemployment). In Wales, for the year ending 30 June 2018, the unemployment rate was 4.8 per cent, corresponding to an unemployment level of 72,300 persons. This rate was down 0.7 percentage points on the unemployment rate ten years previously, but is higher than the UK unemployment rate of 4.2 per cent. The highest unemployment rate was in South East Wales, and the lowest in North Wales.

The economic inactivity rate\textsuperscript{28} is the percentage of the population who are not working and not seeking nor available to work. Economically inactive people include people looking after the family and / or home, retirees and people with a sickness or disability. Across Wales, the economic inactivity rate among 16-64 year-olds (excluding students) was 20.0 per cent, which corresponds to an economic inactivity level of 347,100 people. This rate was down 3.4 percentage points on ten years previously. The economic inactivity rate for Wales and all three Welsh regions is higher than the UK equivalent, which is was 17.8 per cent for the year ending 30 June 2018.

More information on regional economic statistics can be found in the Welsh Government’s regional economic and labour market profiles\textsuperscript{29}.

**Figure 15: Workplace employment by region, 2017**

![Source: Annual Population Survey, Office for National Statistics; Business Register Employment Survey (BRES), Office for National Statistics](image)

Across Wales, almost half of workplace employment (or total jobs)\textsuperscript{30} are based in South East Wales, though it also has the greatest range of workplace employment levels, including the local authorities with both the highest and the lowest numbers of jobs in Wales.

Across Wales, over 50 per cent of jobs fell under 2 broad sectors\textsuperscript{31}: Public administration, defence, education and health; and Wholesale, retail, transport, hotels and food. Real estate activities represented the smallest sector across Wales.

\textsuperscript{27}StatsWales: ILO unemployment rates by Welsh local areas and year
\textsuperscript{28}StatsWales: Economic inactivity rates (excluding students) by Welsh local area and year
\textsuperscript{29}Welsh Government: Regional economic and labour market profiles
\textsuperscript{30}StatsWales: Workplace employment by Welsh local areas and broad industry
\textsuperscript{31}StatsWales: Workplace employment by Welsh local areas and broad industry
The fastest-growing sectors between 2007 and 2017 were Professional, scientific and technical services, administrative and support duties; and Information and Communication. These sectors held the top 2 positions for employment growth both as a count and as a percentage change between 2007 and 2017. The smallest of the sectors across Wales, real estate activities, saw the third largest increase in employment between 2007 and 2017, in percentage terms.

**Inter-Departmental Business Register (IDBR) data**[^32] shows that in 2018, across Wales, the vast majority of enterprises had fewer than 10 employees. Around 65 per cent of large enterprises fell under 2 sectors: Wholesale, retail, transport, hotels, food and communication; and Financial and business services. The sector with the highest proportion of enterprises in the micro size-band was Agriculture.

[^32]: StatsWales: Enterprises by industry (SIC2007), size-band and area
Figure 17: Change in local authority population due to people commuting in and out for work, 2017

Source: Annual Population Survey, Office for National Statistics

For Wales as a whole, there was a net worker population change of -52,500 workers, indicating that more people commute out of Wales than in.

The net worker population change was negative in 15 of the 22 local authorities, meaning that in these authorities, more people commute out of the authority to go to work than commute in from other authorities. This includes commuting across the Welsh border into areas such as Bristol, Shropshire, Herefordshire, and Cheshire West and Chester, among others. The 3 most highly populated authorities in Wales were also those with the highest net levels of worker population change.

All three Welsh regions include at least 2 local authorities with more workers commuting in than out, though this data does not show exactly where these workers have commuted from. Please note that figures, including data for the regions have been calculated from published rounded figures.

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33 StatsWales: Commuting patterns in Wales by Welsh local authority
34 StatsWales: Detailed commuting patterns by Welsh local authority and measure
Figure 18: Average distance travelled to work (km) by workers aged 16-74 in 2011, by local authority of residence

Source: National Census data, Office for National Statistics

*Census data* shows that on average, working residents aged 16-74 in Isle of Anglesey travelled further than workers of any other local authority in Wales to get to work. Cardiff workers, on average, had the shortest commutes in Wales in terms of distance.

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35 ONS: 2011 Census Analysis, Distance Travelled to Work
Between 2008 and 2017, the proportion of adults aged 18-64 across Wales with no qualifications has decreased from 15.2 per cent to 8.7 per cent. A decrease was seen in each of the local authorities in Wales, except in Flintshire, which saw an increase of 2 percentage points. Meanwhile, the proportion of those qualified to NQF level 2 or above has increased from 68.9 per cent to 78.5 per cent. The greatest change was in Caerphilly, which saw an increase of 15.6 percentage points. In 2017, 37.5 per cent of people in Wales had achieved some form of higher education-level qualification (NQF level 4 or above). Most of these were qualified to NQF levels 4-6, and this was the grouping with the highest proportion of the population in it for the 2017 period.

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36 **StatsWales: Highest qualification level of working age adults by region and local authority**
Transport

Figure 20: Transport Infrastructure in Wales

Source: Ordnance Survey

There are three motorways in Wales; these are the A48(M), M4 and the M48.

Total freight traffic\textsuperscript{37} at ports in Wales fell by 3.6 per cent in 2017 to 51.6 million tonnes (Mt), its lowest level since comparable records began in 1976. The three most important ports in Wales meet specialised shipping needs:

- Milford Haven handles mainly crude oil, oil products and liquefied natural gas
- Port Talbot imports iron ore and coal mostly for the adjacent steelworks
- Holyhead is the main port for freight and sea passenger transport with the Irish Republic.

\textsuperscript{37} Welsh Government: Sea transport (2017)
Census data from 2011\textsuperscript{38} shows that of Welsh residents aged 16-74 in employment (1.36 million persons), 74.7 per cent travelled to work by car, van, motorcycle, scooter or moped. Only 6.6 per cent (90,000 persons) commuted by train, bus, minibus or coach in the same period. Meanwhile, 12.1 per cent (165,000 persons) travelled to work on foot or by bicycle. This pattern was broadly the same across all three Welsh regions, with the exception of slightly higher proportional use of trains, buses, minibuses and coaches in South East Wales.

Figure 21: Frequency of walking for active travel purposes among adults aged 16+ in Wales (a), (b)

\begin{figure}
\centering
\includegraphics[width=\textwidth]{figure21}
\caption{Frequency of walking for active travel purposes among adults aged 16+ in Wales (a), (b)}
\end{figure}

(a) The National Survey was not carried out in 2015-16

(b) The survey question changed in 2017-18 and the walking time was increased from 5 minutes to 10 minutes. This means that it is not possible to draw any comparisons with previous years.

Source: National Survey for Wales

Data from the National Survey for Wales\textsuperscript{39} shows that across Wales in 2017-18, 58 per cent of adults walked more than once a week for active travel purposes\textsuperscript{40}, and 6 per cent of all adults aged 16 and over cycled at least once a week for active travel purposes. Residents of urban areas were shown to be more likely to walk regularly than those living in rural areas, with 47 per cent of residents of urban areas walking at least three times a week, compared with 33 per cent of those from rural areas. This could be due to residents of urban areas having more destinations within walking distance than those living in rural areas.

\begin{footnotesize}
\textsuperscript{38} Nomis, ONS: Method of travel to work (Table QS701EW) \\
\textsuperscript{39} Welsh Government: Active Travel: walking and cycling (April 2017 to March 2018) \\
\textsuperscript{40} "Active Travel" is walking or cycling as a means of transport; that is walking or cycling in order to get to a particular destination such as work, the shops or to visit friends. It does not cover walking or cycling done purely for pleasure, for health reasons or for training.
\end{footnotesize}
Meanwhile, active travel data\textsuperscript{41} taken from the 2016-17 National Survey for Wales shows that 45 per cent of children travelled to primary school either by walking or by bike, compared to 34 per cent of children travelling to secondary school. However, although primary school pupils were more likely than secondary school pupils to walk or cycle to school, they were also more likely to travel to school by car. This was due to a much higher proportion of secondary school children using a school bus relative to primary school children.

Figure 22: 20 busiest rail stations in Wales by station entries/exits, 2016-17

Source: WG analysis of estimates of station usage from the Office of Rail and Road

Welsh rail station use is concentrated around commuter lines to Cardiff; 15 of the 20 busiest rail stations in Wales\textsuperscript{42} by station entries/exits in 2016-17 were in South East Wales. More than half were on the Valleys Network line, accounting for 18 per cent of total station entries/exits in Wales during this period (this excludes entries/exits for Cardiff Central and Cardiff Queen Street Stations). Cardiff Central alone accounted for 24 per cent of all station entries/exits in Wales in 2016-17.

\textsuperscript{41} Welsh Government: Active Travel: walking and cycling (April 2016 to March 2017)
\textsuperscript{42} Welsh Government: Rail station usage (April 2016 to March 2017)
Across Wales, there were 51.7 million rail station entries/exits in 2016-17, accounting for 1.8 per cent of the UK total. Wales’ rail station usage grew by 1.3 per cent in 2016-17 relative to the previous year, this continued a positive trend in rail station entries/exits since the beginning of the data series in 2004-05).

Looking at the longer term, data from the Office of Rail and Road\textsuperscript{43} shows that the number of train journeys made in Wales increased by 45.4 per cent between the 2006-07 and 2016-17 periods. The majority of this increase was in journeys starting and/or finishing in South East Wales.

\textsuperscript{43} StatsWales: Rail passenger journeys by Local Authority and year
Environment

Figure 24: Heritage Coast and Special Protection Areas in Wales

Source: Natural Resources Wales

Heritage Coasts were set up to protect coastlines from insensitive developments. They occupy about a third of the Welsh coastline, 500 km (300 miles).

There are 21 Special Protection Areas (SPAs) entirely or partially located in Wales. These exist to conserve the habitats of rare or vulnerable bird species (of which there are 48 in the UK), as well as some migratory species which visit Welsh shores regularly.

44 Lle: Heritage Coasts
45 Lle: Special Protection Areas (SPA)
Wales is home to 3 National Parks: Snowdonia; Brecon Beacons; and Pembrokeshire Coast. 5 areas have also been designated Areas of Outstanding Natural Beauty (AONBs): Gower; part of the Wye Valley; the Clwydian Range and Dee Valley; Anglesey; and Llyn Peninsula. There are also 1,063 Sites of Special Scientific Interest (SSSIs) in Wales.

Source: Natural Resources Wales
Air pollution levels are gradually decreasing in Wales, with the average observed nitrogen dioxide concentration in Wales decreasing from 14 µg/m³ in 2007 to 9 µg/m³ in 2017. This varied across Wales. Overall, more populous local authorities had higher observed concentrations of nitrogen dioxide than less populous authorities. Cardiff had the highest concentration (17 µg/m³), with the lowest observed concentration of 4 µg/m³ in Ceredigion and Powys. Newport observed the greatest change in nitrogen dioxide concentrations between 2007 and 2017, decreasing by 8 µg/m³ over this period.

Renewable energy generation capacity has been increasing across Wales in recent years, with a capacity of 3,683 megawatts (MW) of low-carbon energy in 2017 through over 67,000 projects. 41 per cent of this capacity was in Mid and South West Wales, 21 per cent in South East Wales, and 18 per cent in North Wales. The remaining 20 per cent was offshore or at an unknown location. 87 per cent of low-carbon energy projects in Wales were for solar energy (photovoltaic or thermal).

Source: Air Concentration, Department for Environment, Food and Rural Affairs; Small area population estimates (SAPE), Office for National Statistics; Geographical information, Welsh Government

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49 StatsWales: Air Quality Indicators, by Local Authority
50 StatsWales: Low Carbon Energy Generation by Local Authority and Technology
51 (r) This paragraph was revised on 23/08/2019
Since 2012-13, household reuse, recycling and composting rates have been increasing in Wales, while the percentage of municipal waste sent to landfill has been decreasing. However, 2017-18 data was not consistent with these two trends.

In 2017-18, the amount of local authority municipal waste that was reused, recycled or composted\textsuperscript{52} was 63 per cent in Wales. This was 10 percentage points higher than in 2012-13, despite a fall between 2016-17 and 2017-18.

Meanwhile, the amount of local authority municipal waste sent to landfill\textsuperscript{53} was 11 per cent in Wales. This was more than in 2016-17, but the trend shows a decrease relative to the 41 per cent rate recorded in 2012-13, the earliest year for which directly comparable data is available.

\textsuperscript{52} StatsWales: Annual reuse/recycling/composting rates by local authority

\textsuperscript{53} StatsWales: Annual management of waste by management method
In 2017-18, the average person in Wales generated 184kg of residual household waste (waste generated that is not included in separate recycling or composting collection rounds), compared to 217kg in 2012-13. This represents a decrease of 15.2 per cent.

Source: WasteDataFlow, Natural Resources Wales

54 StatsWales: Annual residual household waste produced per person (kilograms) by local authority
Prosperity

Figure 29: GVA per head in Wales and the UK (£), 1998 - 2017

*The UK total excluding any elements of household income that cannot be assigned to specific regions, i.e. elements that are extra-regio. It is the total of the English regions, Wales, Scotland and Northern Ireland and is the most appropriate aggregation.

Source: Regional Accounts, Office for National Statistics

Gross Value Added (GVA) per head for 2017 and Gross Disposable Household Income (GDHI) for 2016 show that both measures increased relative to the previous year, continuing the longer term trend, yet remain lower than the UK values.

GVA per head is a useful way of comparing regions of different sizes. It is not, however, a measure of regional productivity.

It should be noted that regional GVA figures are subject to limitations, as they can be affected by the impact of factors such as commuting between regions, and differences between regions in demography and types of employment. Further information on this can be found in the following ONS blog post. In addition, note that the regional figures are apportioned from national totals based on regional indicators. The regional indicators, which include administrative and survey data, are regarded as the most appropriate sources, but may result in imperfect regional allocations.

In 2017, GVA per head in Wales was £19,899. This was a 2.7 per cent increase compared with 2016, and a 74.1 per cent increase on 1999. In 2017, South East Wales had the highest GVA per head of the Welsh regions. In Mid & South West Wales the GVA per head was lower than elsewhere in Wales and almost £10,000 per head below the UK level for the same period.

55 Data included is the balanced approach for GVA
56 StatsWales: Gross Value Added by measure, Welsh economic region and year
57 StatsWales: Gross Disposable Household income by measure, Welsh economic region and year
58 National Statistical, ONS: Mind the gap: why the UK might not be the most regionally unequal country
GDHI is an estimate of the amount of money that households have available for spending or saving. In Wales, GDHI per head was £15,835 in 2016, up 0.7 per cent on the previous year, and 58.8 per cent higher than in 1999. The highest level of GDHI per head during 2016 was in North Wales, and the lowest was in Mid & South West Wales. This was also the case in 1999.

In 2018, the medium gross weekly earnings of full-time employees across Wales were £509.00. This was an increase of £10.70 relative to 2017, but remained £60 lower than the UK median value. Comparing the regional data, the median wage in South East Wales in 2018 was £520.00 which was higher than both Mid & South West Wales (£501.90) and North Wales (£498.80).

ONS estimates indicate that in 2018, 26.0 per cent of employees in Wales were earning below the living wage (£8.75 in 2018, as defined by the Living Wage Foundation). The estimate for the UK was 22.8 per cent. The highest proportion of employees earning below the living wage was in Conwy (35.3 per cent), and the lowest proportion was in Caerphilly (20.5 per cent). Please note that these local authority estimates vary in quality, mainly reflecting the size of the samples.

ONS research indicates that in the tax year ending 2016, 40.8 per cent of households in Wales had an income of £15,000 or lower when taking into account PAYE and benefits. Using the same measures, 13.8 per cent of household incomes were above £30,000. In England, the equivalent rates for these income groups were 38.7 per cent and 18.8 per cent respectively. These reports are published as outputs from research into a different methodology to that currently used in the production of income statistics. These outputs must not be interpreted as an indicator of poverty or living standards.

Across Wales, 17.4 per cent of pupils aged 5-15 were eligible to receive free school meals in 2017/18, up 0.4 percentage points on 2007/08. This ranged from 18.6 per cent in South East Wales to 15.4 per cent in North Wales. However, North Wales saw the greatest increase in eligibility over the previous ten years.

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59 StatsWales: Average (median) gross weekly earnings by Welsh local areas and year (£)
60 ONS: Annual Survey of Hours and Earnings (ASHE) - Estimates of the number and proportion of employee jobs with hourly pay below the living wage, by work geography, local authority and parliamentary constituency, UK, April 2017 and April 2018
61 ONS: Research Outputs: Income from Pay As You Earn (PAYE) and benefits for tax year ending 2016
Welsh Index of Multiple Deprivation

The Welsh Index of Multiple Deprivation (WIMD)\(^{62}\) is the Welsh Government’s official measure of relative deprivation for small areas in Wales. It is designed to identify those small areas where there are the highest concentrations of several different types of deprivation. Deprivation is the lack of access to opportunities and resources which we might expect in our society. This can be in terms of material goods or the ability of an individual to participate in the normal social life of the community.

There are 1909 Lower Super Output Layers (LSOAs) in Wales. Of these, 49 per cent are in South East Wales, 29 per cent are in Mid and South West Wales, and 22 per cent are in North Wales.

Considering the 191 most deprived LSOAs across all of Wales in 2014 – i.e. the 10 per cent most deprived, 66 per cent are in South East Wales, 21 per cent are in Mid and South East Wales, and 12 per cent are in North Wales.

In WIMD 2014, there were pockets of high relative deprivation in the South Wales valleys and large cities, and in some North Wales coastal and border towns.

Please note that WIMD is due to be updated in November 2019, including an online tool providing further statistical breakdowns by Welsh economic region.
Enterprises

Welsh enterprises had a high birth rate and a low death rate relative to the rest of the UK in 2017. There were 14,120 enterprise births\textsuperscript{63} in Wales in 2017, giving it an enterprise birth rate of 13.7 per cent of total enterprise stock, the third highest rate of the twelve UK countries and regions. The UK birth rate was 13.1 per cent. There were 10,725 business deaths in Wales in 2017 which is a rate of 10.4 per cent of enterprise stock. This was the second lowest rate amongst the twelve UK countries and regions (with London having the highest at 14.2 per cent). The UK death rate was 12.2 per cent.

Figure 30: Survival rates of Welsh businesses founded in 2012 (2017 data)

![Survival rates of Welsh businesses founded in 2012](image)

Source: Business Demography, Office for National Statistics

Of businesses started in Wales in 2012, 92.3 per cent survived their first year\textsuperscript{64}, 60.4 per cent were still in business after 3 years, and 44.0 per cent were still operating after 5 years. The data indicates that Ceredigion was the local authority with the highest proportion of businesses surviving the first five years (52.8 per cent). Whereas, Blaenau Gwent had one of the highest survival rates in Wales for the first year (96.0 per cent), and yet the lowest five-year survival rate in Wales (36.0 per cent).

\textsuperscript{63} StatsWales: Business births, deaths and active enterprises by variable, area and industry (SIC 2007)

\textsuperscript{64} StatsWales: Business Survival Rates by area and survival year
Digital Infrastructure

Figure 31: Percentage of homes and businesses with superfast or ultrafast broadband availability by local authority, September 2018

Source: Connected Nations Report, the Office of Communications

In September 2018, Wales was broadly in line with the rest of the UK in terms of access to a superfast broadband speed (30Mbit/s or higher), with an access rate of 93 per cent of premises (homes and businesses), compared to 94 per cent across the UK. For Wales, this was a 4 percentage point increase on 2017 data. However, Wales had the lowest take-up in any of the UK nations, with 38 per cent of Welsh premises using these services.

29 per cent of Welsh homes and businesses were able to access an ultrafast fixed broadband speed in September 2018. This was an increase of 19 percentage points on 2017, yet remained lower than the UK rate of 49 per cent.

65 Ofcom: Connected Nations 2018
Access to full fibre services\textsuperscript{66} in Welsh homes and businesses was 7 per cent in September 2018, this was 1 percentage point higher than the UK level. Full-fibre broadband uses fibre-optic cables to connect homes and businesses to the street cabinet, replacing copper connections. Full-fibre connections provide a better and more reliable service that can deliver speeds of up to one gigabit per second.

Across Wales’ local authorities, average download speeds ranged from 24.5 Mbit/s in Powys to 61.0 Mbit/s in Cardiff. From a regional perspective, South East Wales and Mid & South West Wales saw large disparities in average download speeds across its local authorities. Authorities with more densely populated cities, such as Cardiff, Swansea and Newport, experienced higher average download speeds than those authorities with a lower population density. Meanwhile, North Wales had the smallest range in average download speeds across local authorities, with all six of its local authorities having average download speeds between 28.8 Mbit/s and 30.5 Mbit/s.

\textsuperscript{66} Ofcom: Building a full-fibre future
Across Wales, 48,000 homes and businesses (3 per cent) did not meet the Universal Service Obligation minimum in September 2018, meaning that they were unable to access a download speed of 10Mbit/s and an upload speed of 1Mbit/s. This was 1 percentage point above the UK level. There is less access to a decent broadband service in rural areas: 13 per cent of rural premises in Wales cannot access such a connection, compared to 1 per cent of urban premises.

Source: Connected Nations Report, the Office of Communications
Mobile coverage is improving in Wales, but coverage from all four network operators remains lower than the UK figure.

Ofcom data shows that 69 per cent of indoor premises (homes and businesses) in Wales had 4G coverage from all four operators in September 2018, compared to 45 per cent in June 2017. The UK level was 77 per cent. 10 per cent of Wales’ geographic area was not covered by any operator, this was equivalent to the UK rate.
Data on telephone call services shows that 88 per cent of indoor premises in Wales were covered by all four operators in September 2018. This was up 8 percentage points relative to June 2017, but remained 4 percentage points lower than the UK rate. 5 per cent of Wales’ geographic area was not covered by any operator in September 2018, down from 9 per cent in June 2018, and matching the UK rate.
Housing

Both the total number of dwellings and the number of estimated private sector dwellings in Wales have grown steadily over the last 10 years. During this period, the total number of dwellings in Wales\(^67\) has increased by 6 per cent to an estimated 1.4 million dwellings at 31 March 2017.

Private rental is becoming more common in Wales, with 14 per cent of all dwellings in Wales privately rented in 2017. This goes some way to explaining the growth in the number of dwellings in the private sector, which accounted for 84 per cent of all dwellings in 2017. The percentage of dwellings which are owner occupied has fallen over recent years. However, they continue to represent the majority of all dwellings in Wales, accounting for 70 per cent of dwellings in 2017.

\(^67\) StatsWales: Dwelling stock estimates by local authority and tenure
Across Wales, 6,663 new dwellings were completed over the 2017-2018 period. This is 23 per cent fewer than 10 years previously and 21 per cent fewer than 20 years previously. For the 2017-18 period, 56 per cent of new dwellings were completed in South East Wales. The highest number of new dwellings completed in Wales was in Newport (856, or 13 per cent) and the lowest was in Blaenau Gwent (50, or 1 per cent).

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68 The figures provided by local authorities and the National House-Building Council (NHBC) are from records kept for building control purposes. It is sometimes difficult for building control officers to identify whether a dwelling is being built for a Registered Social Landlord (RSL) or for a private developer, which may lead to an under-count of RSL new house building and an over-count for the private sector.

69 StatsWales: New dwellings completed by area, dwelling type and number of bedrooms
Figure 37: Average dwelling prices in Wales over time by dwelling type

Source: UK House Price Index, HM Land Registry

Data from the December 2018 UK House Price Index\textsuperscript{70, 71} shows that in September 2018 the average house price in Wales was £161,100, an increase of almost £28,500, or 21.5 per cent over a ten year period. At a local authority level, both the highest and lowest average house prices could be found in South East Wales, in Monmouthshire (£268,000) and Blaenau Gwent (£89,000) respectively.

2014-based household projections\textsuperscript{72} show that by 2028, there could be around 484,800 one-person households in Wales, an 11 per cent increase on the projected level for 2018. By 2039, the projected number of one-person households is over 528,100, with 49 per cent of these in South East Wales. The projected average household size in 2028 ranges from 2.11 in Powys in Mid & South West Wales to 2.36 in Merthyr Tydfil in South East Wales. The projected average household size for Wales in 2028 is 2.21 persons, decreasing to 2.17 by 2039. It should be noted that these data are projections based on past trends, and should not be treated as forecasts.

\textsuperscript{70} Land Registry: UK House Price Index
\textsuperscript{71} As of the December 2018 publication of the UK House Price Index (UK HPI). The UK HPI is a mix-adjusted index, which mean it is weighted to reflect the actual mix of properties sold in the previous year. The UK HPI is published monthly. All figures in the UK HPI are liable to revisions for up to 12 months.
\textsuperscript{72} StatsWales: Household projections by local authority, household type and year
Figure 38: Average annual estimates of additional housing need (Wales)

Source: Estimates of housing need in Wales at a national and regional level (2018-based)

Estimates of housing need\(^{73}\) show that for the first 5-year period (2018/19-2022/23), between 7,200 and 9,700 additional housing units are required annually in Wales (with a central estimate\(^{74}\) of 8,300). Under the central estimates, 56 per cent of the additional housing units are estimated to be needed in South East Wales. For the third period (2028/29-2032/33), the range of estimates falls to between 2,900 and 7,200 (with a central estimate of 5,200) and by the mid to late 2030s (2033/34-2037/38), the central estimate is 3,100 additional housing units. This reflects a slowdown in the projected household growth from the 2014-based household projections. Please note that housing need estimates by tenure (market and affordable) at the regional level will shortly be published on our website\(^{75}\).

Local authorities estimated that 345 persons were sleeping rough\(^{76}\) across Wales in the 2 weeks between 16\(^{th}\) and 29\(^{th}\) October 2017. This is an increase of 10 per cent (32 persons) compared with the exercise carried out in October 2016. Almost half (49 per cent) of these were located in South East Wales, and over a quarter (27 per cent) were located in Cardiff.

\(^{73}\) Welsh Government: Housing need and demand (2018-based)

\(^{74}\) Based on 2014-based household projections

\(^{75}\) Welsh Government: Housing need and demand

\(^{76}\) StatsWales: Rough Sleepers by local authority
Wales is home to 3 UNESCO world heritage sites: the Castles and Town Walls of Edward I in Gwynedd (Caernarfon, Conwy, Beaumaris and Harlech), as well as Pontcysyllte aqueduct and canal, are based in North Wales, while Blaenavon industrial landscape is situated in South East Wales.

In the six months from January to June 2018, there were 4.6 million overnight trips to Wales by GB residents, an increase on the year before of 7.6 per cent. During this period the expenditure in Wales was £817 million. 2017 data shows that 9.0 million overnight visits were made in Wales, amounting to 31.0 million nights in total. This was a little over 10 per cent of the total number of nights spent in Great Britain. The expenditure on these trips was £1.6 billion, 6.9 per cent of the GB total. These Wales figures have been decreasing since 2015.

Source: Cadw

77 Welsh Government: Wales tourism performance: January to June 2018
78 Welsh Government: Great Britain Tourism Survey (2017)
During the first six months of 2018 there were 430,000 trips taken in Wales by international visitors with an expenditure of £167 million. This was a decrease in the volume of trips by international visitors to Wales compared to the same period in 2017, but there was a similar fall across the UK as a whole, and overall expenditure in Wales increased.

In 2017, there were 1.8 billion Tourism Day Visits (TDVs) in Great Britain, of which 100 million (6 per cent) were in Wales. Within Wales, fewer TDVs were reported in 2017 than in 2011, though the number has fluctuated over this period. The total expenditure from TDVs in Wales in 2017 was over £4.3 billion, 7 per cent of the GB total. There was an increase in the volume of TDVs taken in Wales during the first six months of 2018 with 46.7 million trips taken and an expenditure of £1.9 billion.

In 2017, TDVs in Wales were more likely than those taken in England to involve outdoor leisure activities or to be described as general days out to explore an area. They were also much more likely to include a visit to the seaside/coast than other UK nations, and far less likely to include a trip to a city or large town.

In 2017, 26 per cent of Tourism Day Visits to Wales were made by people from outside Wales.

The 2017 Wales Tourism Accommodation Occupancy Survey shows that average hotel bed and room occupancy rates for 2017 were 51 per cent and 67 per cent respectively, a slight increase of 1 percentage point on bed occupancy rates against the previous year, with room occupancy remaining in line with the previous two years. However, in general, the annual average occupancy rates in the hotel sector continue to remain at their highest levels in both measures of occupancy during the last 10 years. The seasonality of occupancy rates for hotels in Wales continued to be evident in 2017. The average room occupancy rate rose from 48 per cent in January to a peak of 79 per cent in August before falling to 53 per cent in December.

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79 Great Britain Day Visits Survey (2017)
80 Welsh Government: Wales tourism accommodation occupancy surveys (2017)
81 Room occupancy is the number of bedrooms occupied over a given period as a proportion of total available bedrooms. Bed occupancy is the number of beds occupied over a given period as a proportion of total available beds.
Key quality information

Relevance
This publication is a compendium of key statistics on nine different topics. As such, it brings together data that is already in the public domain at different geographical levels (e.g. Wales, local authority level). Where possible and appropriate, data has been made available at regional level to offer further context on regional differences that may exist in Wales. More information on specific data sources can be found within the individual releases, referenced in the footnotes.

This publication was initially prepared to support policy teams in Welsh Government in preparing and drafting the new National Development Framework. However, we anticipate that the scope of the usefulness of this publication is further-reaching. It is anticipated that this publication will be used by Welsh Government, local authorities, other public bodies with a regional interest, and the general public, to (i) gain an overview of data collected for Wales and its local authorities and regions on each of the subject areas and (ii) understand differences that may exist between the Welsh regions. Users with a specific interest in one or more of the topics in this report can find a wider range of statistics and data on StatsWales.

Accuracy
The statistics included within this release are taken from official statistics sources, though not all of these have been classified as National Statistics. More information about official statistics and National Statistics can be found on the UK Statistics Authority website. Information about the quality of each of the data sources used can be found within the individual releases, referenced in the footnotes, or within the quality reports that accompany these releases.

Due to the high number of sources included in this publication and the time taken to compile it, more recent data has been published for some sources. This data was known to be the most recently available as at 11/01/2019, though revisions made to data sources, such as the Annual Population Survey (APS) and the Wales tourism performance: January to June 2018 release have been accounted for. Current data is accessible through the links to sources included in the footnotes.

We do not intend to regularly update this report. However, in future, data will be made available on StatsWales and in dashboards, and will be updated as new data is published, ensuring that users are always provided with the latest data.

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82 Welsh Government: National Development Framework
83 StatsWales website
84 UK Statistics Authority: types of official statistics
**Timeliness and punctuality**

This publication has been prepared to fit in with the timing of the drafting and publication of the National Development Framework. Due to the high number of sources included in this publication and the time taken to compile it, more recent data has been published for some sources. This data was known to be the most recently available as at 11/01/2019.

**Accessibility and clarity**

Users may access all data included in this release using the links included in the footnotes. The majority of the data underlying the report, including much more detailed breakdowns, are available on StatsWales and through the StatsWales open data services. Quality information and metadata for each of these sources is also available through these links.

This publication is currently available in printable PDF format, but in future, data will be made available as interactive online reports to maximise impact and efficiency using the Welsh Government open data services.

**Comparability and coherence**

Where different datasets have been used to discuss the same topic (for example in the section on statistics relating to the Welsh language), an explanation is offered as to the strengths and limitations of each of the sources, and the coherence between them, with further information provided in the sources and links. Where data is not comparable over time (for example in the chart on statistics relating to Active Travel), an explanation is offered as to why this is not the case.

Where possible, National Statistics have been used to ensure the data is of high quality and is consistent with statistics on the topics that may be used or other purposes. Further information on the comparability and coherence of each of the sources is available in the sources linked in the footnotes.

**Well-being of Future Generations Act (WFG)**

The Well-being of Future Generations Act 2015 is about improving the social, economic, environmental and cultural well-being of Wales. The Act puts in place seven well-being goals for Wales. These are for a more equal, prosperous, resilient, healthier and globally responsible Wales, with cohesive communities and a vibrant culture and thriving Welsh language. Under section (10)(1) of the Act, the Welsh Ministers must (a) publish indicators (“national indicators”) that must be applied for the purpose of measuring progress towards the achievement of the Well-being goals, and (b) lay a copy of the national indicators before the National Assembly.

Information on the indicators, along with narratives for each of the well-being goals and associated technical information is available in the Well-being of Wales report.


The statistics included in this release could also provide supporting narrative to the national indicators and be used by public services boards in relation to their local well-being assessments and local well-being plans.
Further details
The document is available at: https://gov.wales/summary-statistics-economic-regions-2019

Other related links
National Development Framework

Next update
This publication is a one-off release and will not be updated. However, future data will be made available in dashboard format and will be updated as new data becomes available.

We want your feedback
We welcome any feedback on any aspect of these statistics which can be provided by email to Stats.Info.desk@gov.wales.

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