Regional EU Transition Exposure Dashboards

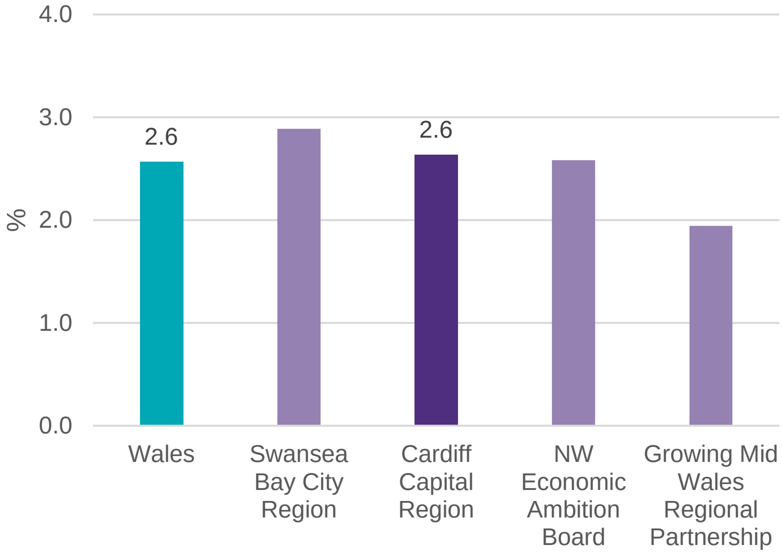
Cardiff Capital Region

2020 update

Cardiff Capital Region. People

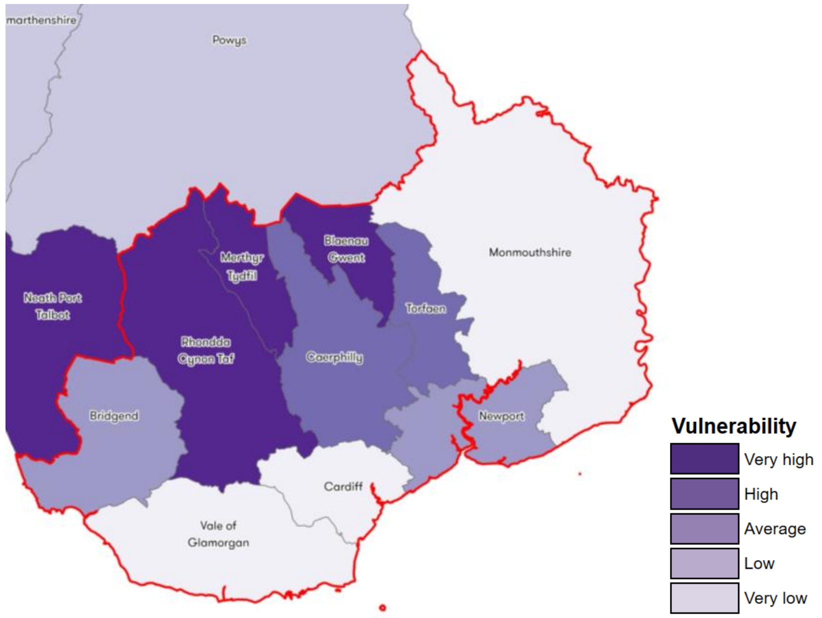
EU residents – Regional

Proportion of population that are non-UK EU born residents



Community Vulnerability Index

Vulnerability Index score



Skills

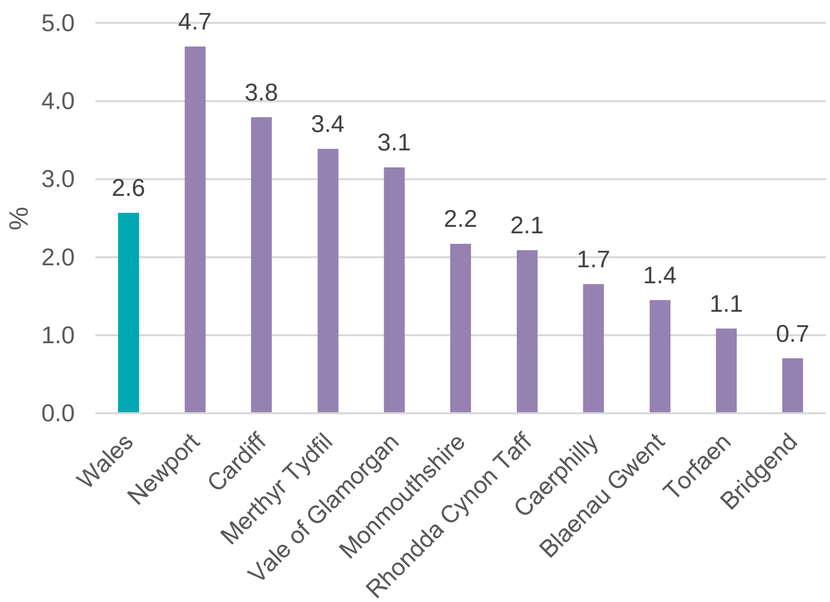
"Those with fewer formal qualifications, are more likely to be employed in the most exposed industries"
Institute of Fiscal Studies, 2018

No qualifications
8.6%
Wales: 8.5%
UK: 7.9%

NVQ 1
11.6%
Wales: 11.2%
UK: 9.9%

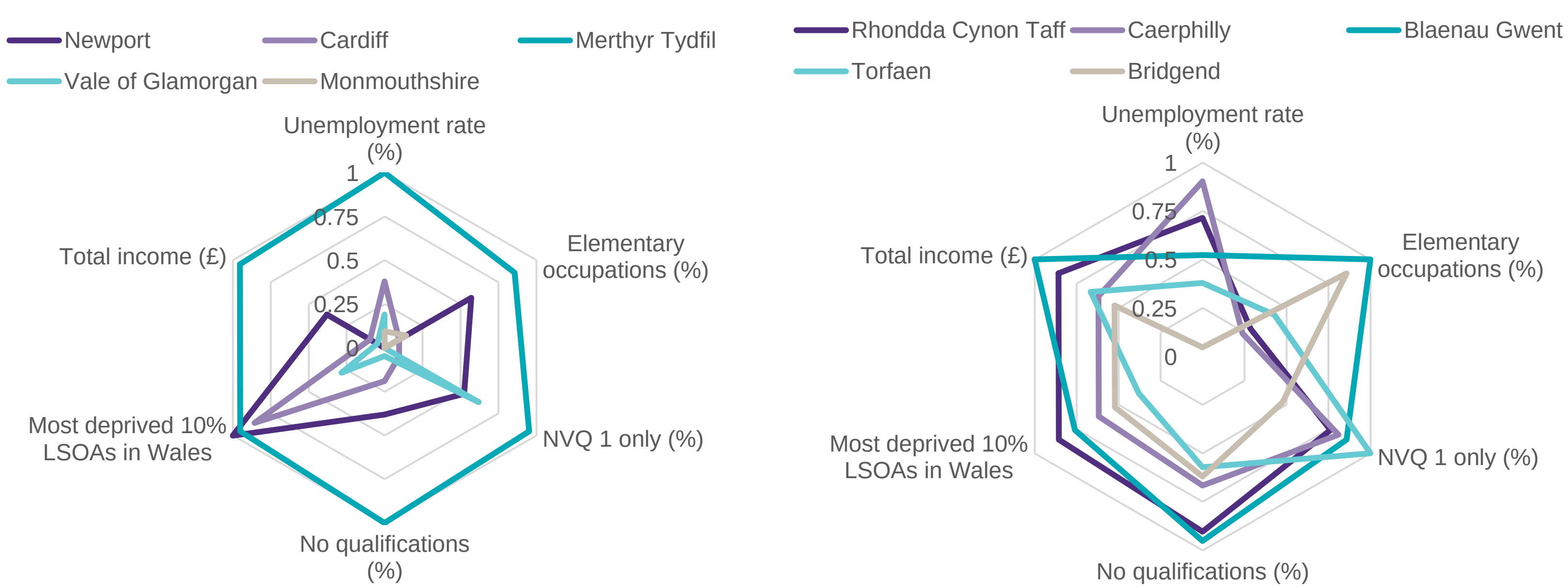
EU residents – Local authorities

Proportion of population that are non-UK EU born residents



Community Vulnerability Index Profile

Larger the shape, the higher the vulnerability (0.5 line = National median)



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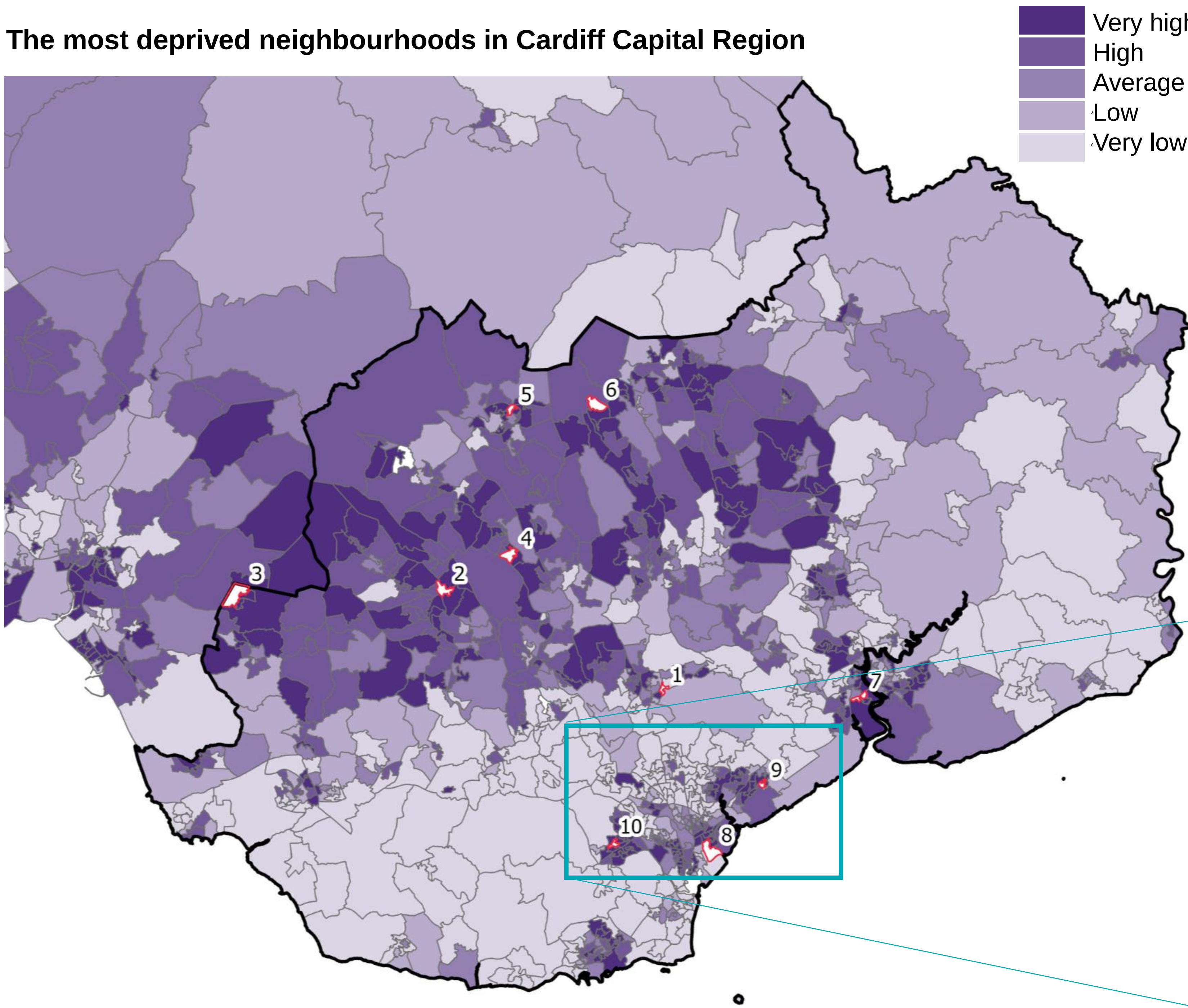
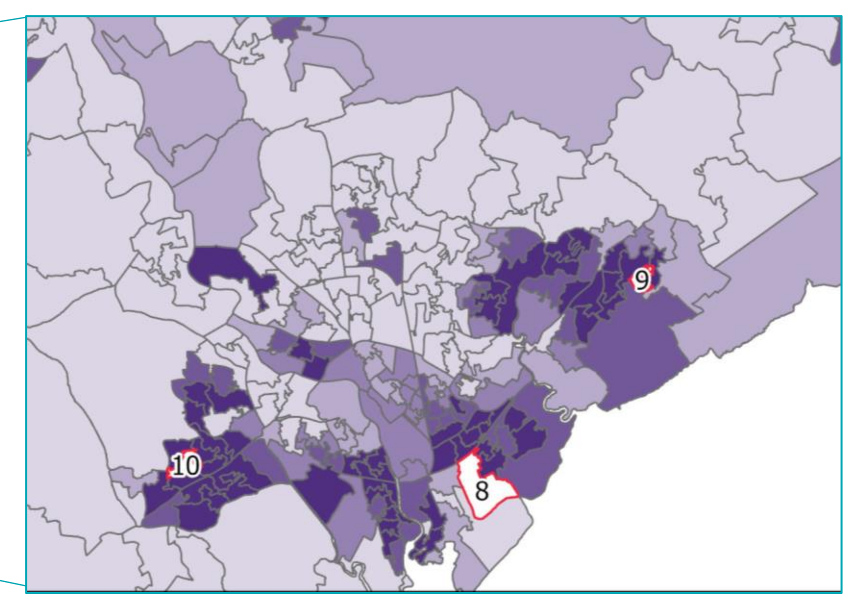
Cardiff Capital Region. People

The most deprived neighbourhoods in Cardiff Capital Region





Top 10 most deprived neighbourhoods

Rank	LSOA name	Local authority	WIMD rank (out of 1,909)
1	St. James 3	Caerphilly	3
2	Tylorstown 1	Rhondda Cynon Taf	4
3	Caerau (Bridgend) 1	Bridgend	5
4	Penrhiwceiber 1	Rhondda Cynon Taf	6
5	Penydarren 1	Merthyr Tydfil	7
6	Twyn Carno 1	Caerphilly	8
7	Pillgwenlly 4	Newport	10
8	Splott 6	Cardiff	12
9	Trowbridge 8	Cardiff	13
10	Ely 5	Cardiff	14

1= most deprived

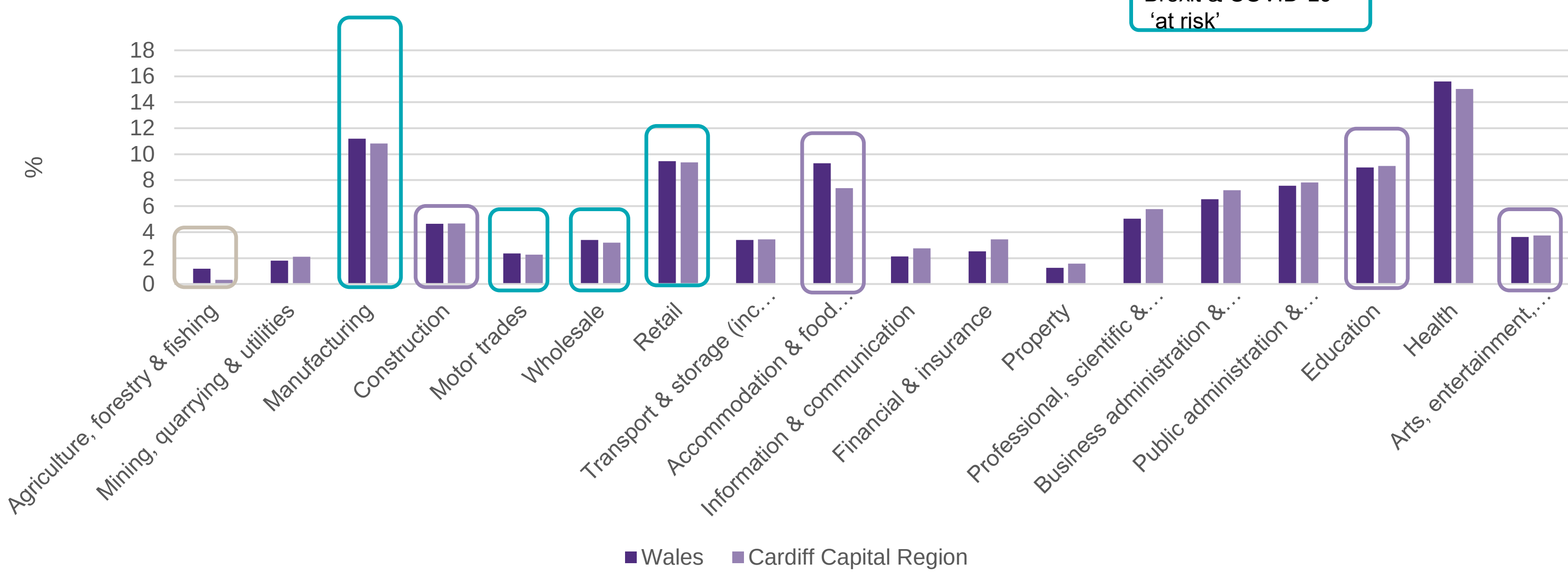
Cardiff Capital Region. Economy

Brexit 'at risk'

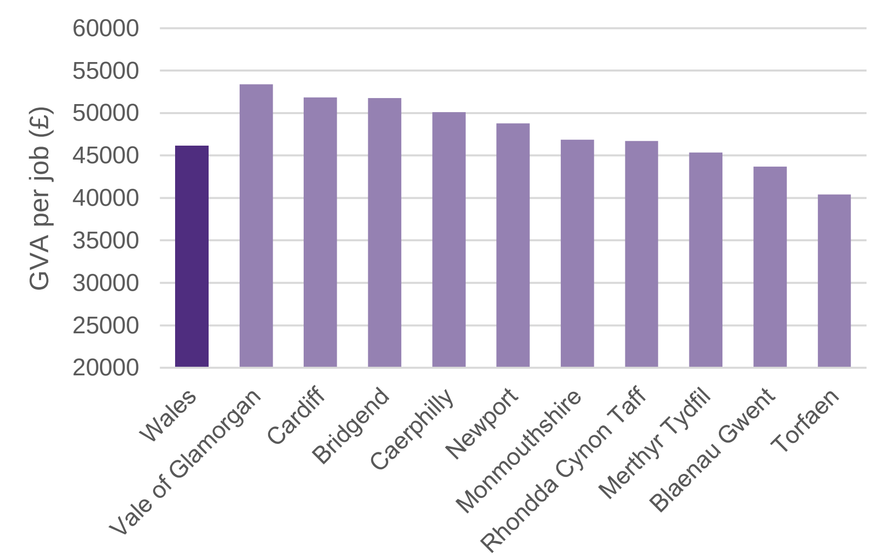
COVID-19 'at risk'

Brexit & COVID-19 'at risk'

Proportion of employment by broad Industrial Sector

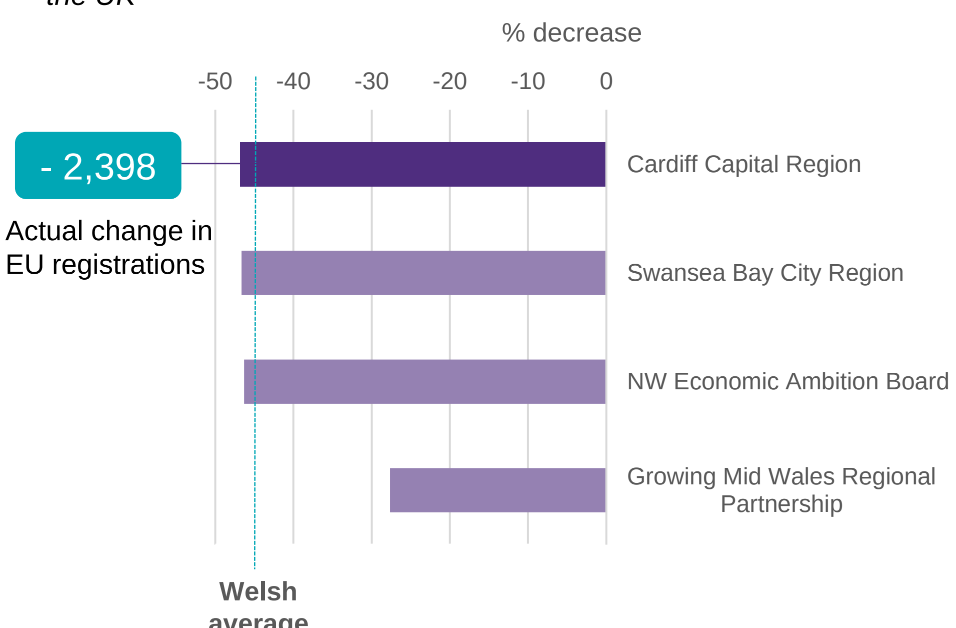


Gross Value Added per job – Local authorities



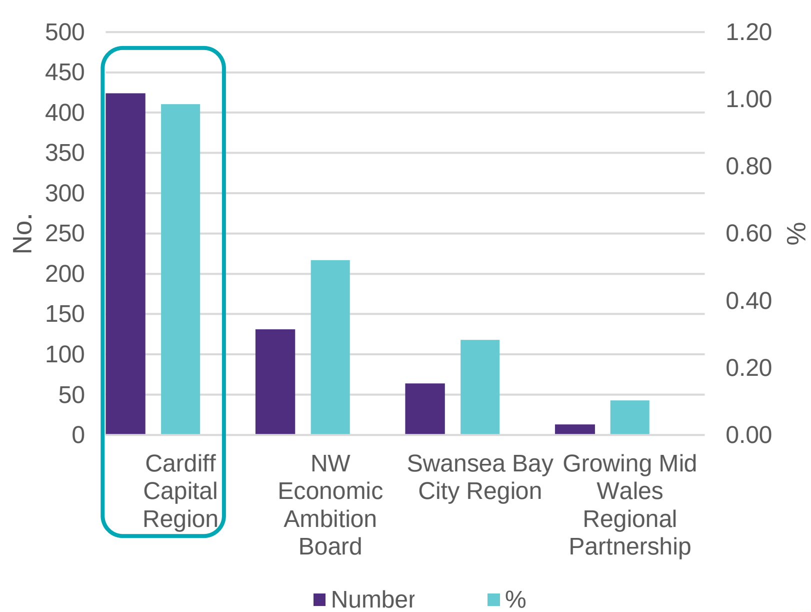
National Insurance Number (NINo) registrations

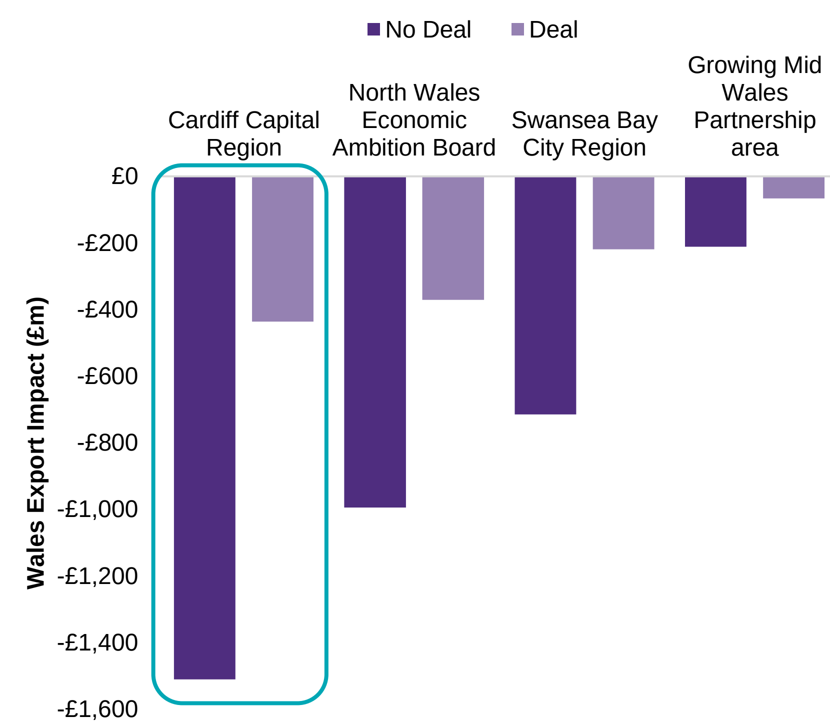
47% reduction in EU registrations between 2016 and 2020 across the UK



Foreign owned businesses

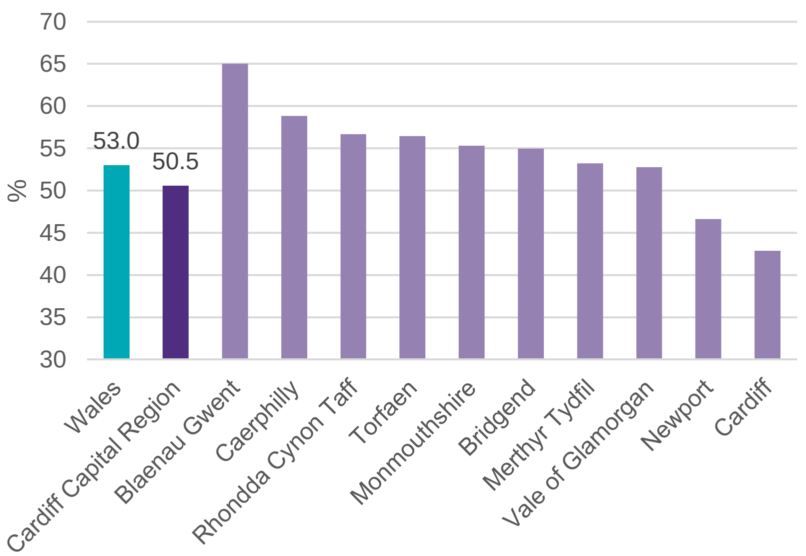
Expressed as a count and proportion of all businesses



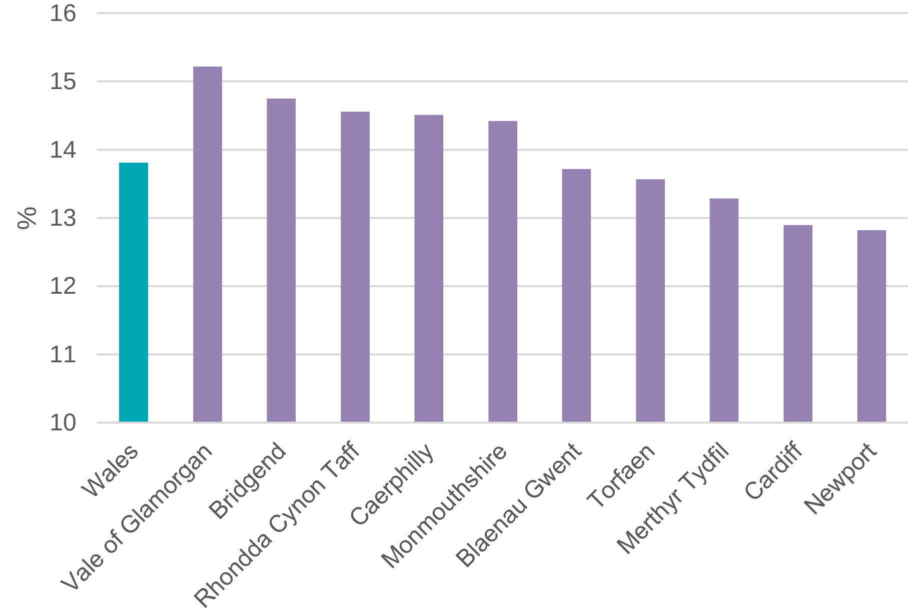


Cardiff Capital Region. COVID-19

Percentage of employment in COVID-19 'at risk' sectors



Estimated decline in total annual GVA resulting from COVID-19

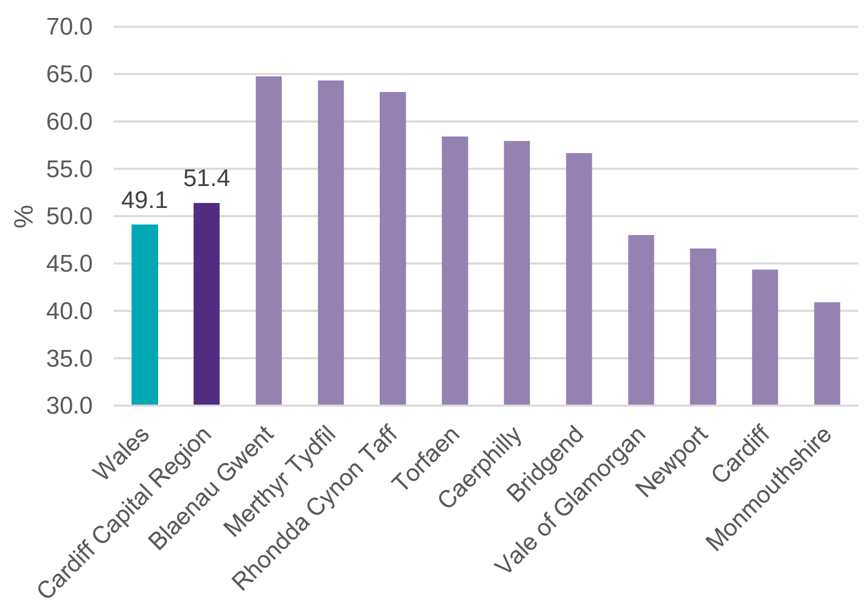


Government support take-up rate

Coronavirus Job Retention Scheme
Cardiff Capital Region: 30%
Wales: 31%
UK: 32%

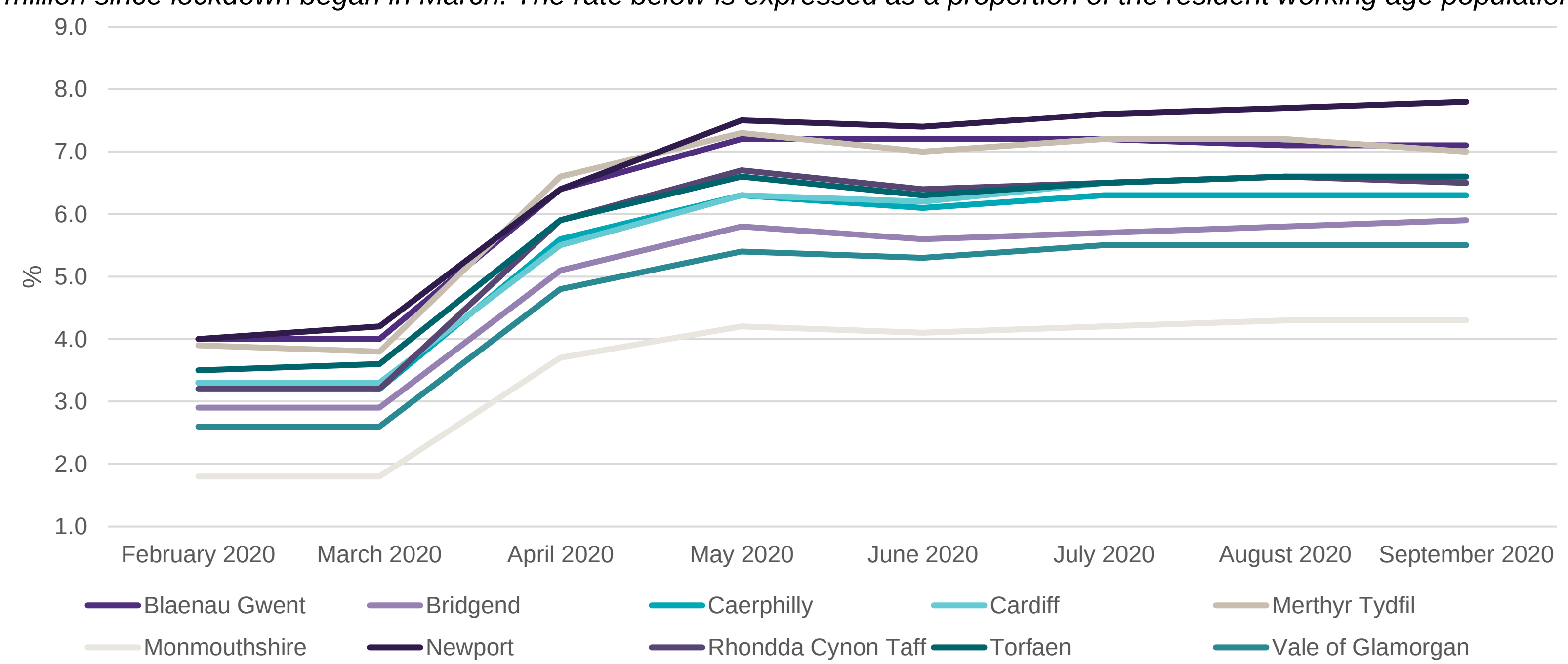
Self-Employment Income Support Scheme
Cardiff Capital Region: 79%
Wales: 78%
UK: 77%

Percentage of businesses in COVID-19 'at risk' sectors



Claimant rate (Feb 2020 to Sept 2020)

The number of people claiming unemployment related benefits in the UK reached 2.7 million in September, an increase of 1.5 million since lockdown began in March. The rate below is expressed as a proportion of the resident working age population.



  | Regional EU transition Exposure Dashboards | Data sources included from page 6 | Final

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Cardiff Capital Region. Summary

Key findings

- Compared to the other three regions, Cardiff Capital Region has an average proportion of population who were born in the EU, at 2.6%, which is the same as the Welsh average.
- Within the region, Newport and Cardiff have the highest proportion of population born in the EU, at 4.7% and 3.8% respectively, whilst the lowest level is in Bridgend (0.7%).
- Across the region there are very varying levels of vulnerability to the EU transition, with local authorities ranking in the top and bottom 20% on our Community Vulnerability Index. Merthyr Tydfil has the highest score on our Vulnerability Index, with notably high levels of deprivation and a high proportion of population with no formal qualifications.
- By comparison, Cardiff, Vale of Glamorgan and Monmouthshire have much lower levels of vulnerability to the EU transition.
- The deprivation map shows that the most deprived neighbourhoods are scattered across the region, with the top 10 LSOA's falling in six of the local authorities within the region. The most deprived LSOA in the region is in Caerphilly, and is also the third most deprived in all of Wales.
- Cardiff Capital Region has seen the greatest proportional decline in EU NINO registrations between 2016 and 2020, reducing by 46.8% (equivalent to 2,398 less registrations).
- Cardiff Capital Region is estimated to see the largest export impact as a result of the EU transition, in both a 'deal' and 'no deal' scenario.
- Overall the region has a low percentage of employment in COVID-19 'at risk' sectors compared to the Welsh average, although in some of the authorities the figure is much higher, such as Blaenau Gwent and Caerphilly.
- As would be expected, all local authorities within the region have seen an increase in claimant count rate since the start of the pandemic but some areas have experienced a greater increase than others, such as Newport.

Data sources

Indicator	Output	Why include?	Source
EU born residents	Bar chart shows proportion of residents that are born in the EU compared to other authorities in the region and the Welsh average.	EU migrants form a crucial part of the economy. In order to understand the potential impacts of changes in migration, it is important to have an overview of what proportion of the current population is made up of EU born residents.	ONS, Population of the UK by country of birth and nationality (Dec 2019)
No qualifications, NVQ 1 only	Factoid showing the proportion of working age residents with no qualifications and the proportion of working age residents qualified to NVQ 1 only.	A study by the Institute of Fiscal Studies found that those with fewer formal qualifications are more likely to be employed in the most exposed industries.	Annual Population Survey (Dec 2019)
Local level deprivation	Thematic map showing the overall Welsh Index of Multiple Deprivation. The top 10 most deprived areas in the region are highlighted in red on the map and listed in the accompanying table.	Deprivation provides an indication of the relative deprivation of small areas. Areas that already have higher levels of deprivation could be more vulnerable to the impacts of Brexit.	Welsh Index of Multiple Deprivation (2019)
Community Vulnerability Index	Spider chart shows how the local authorities with a region perform on individual measures, relative to the national median.	Our 'Community Vulnerability Index' takes into account factors which are most likely to impact on a place's ability to adapt in a post-Brexit world, including unemployment, low skills, low level occupations, no qualifications, income and deprivation. NB: Income has been inversed in the spider chart so that a point towards the outer edge of chart indicates lower income levels.	Annual Population Survey (June 2020, Dec 2019); Survey of Personal Incomes (2018); Welsh Index of Multiple Deprivation (2019);
National Insurance Number (NINo) registrations	Bar chart to see how the number of new registrations has changed between referendum and now.	NINo numbers are often used an indicator for the number of migrants moving into a geographical area for work. This is an important consideration given the contribution that EU workers make to the economy.	NINo registrations to adult overseas nationals entering the UK by Region / Local Authority and world region - registrations year to June 2020, DWP (June 2020)
Employment sectors	Bar chart showing proportional employment in different sectors. Bars are highlighted to show if the sector is recognised as 'at risk' in relation to either Brexit or COVID-19, or both.	Some employment sectors are more vulnerable to the impacts of Brexit and COVID-19, therefore it is important to understand which sectors are most prominent and whether any of these are high risk.	Business Register and Employment Survey (2019)
Foreign Owned businesses	Bar chart showing the total number and proportion of businesses that are foreign owned.	High dependence on foreign owned businesses could pose a risk as there is uncertainty as whether some of these businesses will remain within the UK or relocate.	FAME, Bureau Van Djik (2019)
GVA per filled job	Bar chart showing GVA per job for each local authority within the region, compared to the Welsh average.	GVA per filled job provides a direct comparison between the level of economic output and the direct labour input of those who produced that output. The level of productivity is useful to consider as it is a current weakness in the UK economy and may be further hindered post-Brexit.	Nominal (smoothed) GVA (B) per filled job (£); Local Authority District (2018)
Trade impacts	Bar charting showing the total Export Annualised Impact in a Deal and No deal scenario by Welsh NUTS 3 Regions (£m), NUTS 3 Regions		HMRC & Grant Thornton Analysis. Note: The data doesn't include the impact on WA BTTA, WA Energy exports & WA Other

Data sources (cont.)

Indicator	Output	Why include?	Source
Employment in 'at risk' sectors	Bar chart showing percentage of employment in 'at risk' sectors compared to the Welsh average.	The sectoral make-up of areas will have a strong influence on the economic impacts of COVID-19. For example areas with a high proportion of the workforce employed in accommodation and food services will be more heavily impacted than area with high levels of professional and technical workers. .	GT calculation based on: Business Register and Employment Survey (2019)
Businesses in 'at risk' sectors	Bar chart showing percentage of businesses t in 'at risk' sectors compared to the Welsh average.	The sectoral make-up of areas will have a strong influence on the economic impacts of COVID-19. For example areas with a high proportion of the workforce employed in accommodation and food services will be more heavily impacted than area with high levels of professional and technical workers.	GT calculation based on: UK Business counts (2020)
Estimated decline in total annual GVA resulting from COVID-19	Factoid showing estimated percentage reduction in annual GVA under Covid-19 scenario. The modelled GVA data is based on OBR output losses by sector in 2nd quarter of 2020. A higher figure indicates greater vulnerability.	The level of productivity is useful to consider as it is a current weakness in the UK economy and may be further hindered post-Brexit. The economic productivity of sectors will vary between areas and therefore it is important to consider the knock on impacts of COVID-19 on GVA alongside employment risks.	GT calculation based on: ONS, Regional gross value added (balanced) local authority by NUTS 1 region: UKL Wales (2018) and OBR output losses table
Coronavirus Job Retention Scheme (CJRS) take up rate	Factoid showing take up rate relative to Welsh and UK average.	Certain sectors have been more heavily impacted by COVID-19 than others and as a result a high level of employees have had to be put on furlough. This measure therefore gives an indication of the immediate impacts that COVID-19 is having on local areas.	ONS, Coronavirus Job Retention Scheme (CJRS) Statistics: August 2020
Self-Employment Income Support Scheme (SEISS) take up rate	Factoid showing take up rate relative to Welsh and UK average.	Research has shown that self-employed people are more at risk to the economic impacts of COVID-19. This new dataset gives an early indication of the level of self-employed people in an area who are requiring support.	ONS, Self-Employment Income Support Scheme (SEISS) Statistics: August 2020
Claimant count rate	Line chart showing the change in claimant count rate for all local authorities within the region.	Claimant count data is a timely dataset that can be used to see how COVID-19 is impacting unemployment levels in different areas.	Claimant count (Sept 2020)