

## Summary statistics for Wales, by region: 2020

20 May 2020  
SFR 43/2020

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 four Welsh regions (North Wales, Mid Wales, South West Wales, and South East Wales).

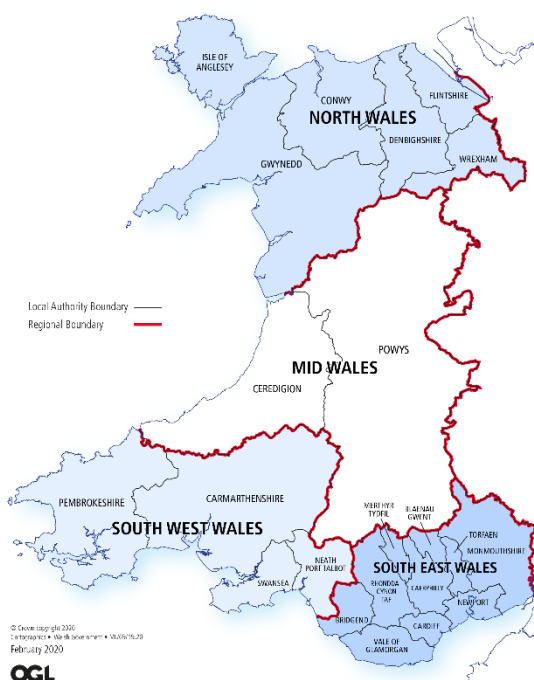
The aim of this release is to provide context to the individual regional releases and to highlight differences that exist between the four regions for the nine topics in question.

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

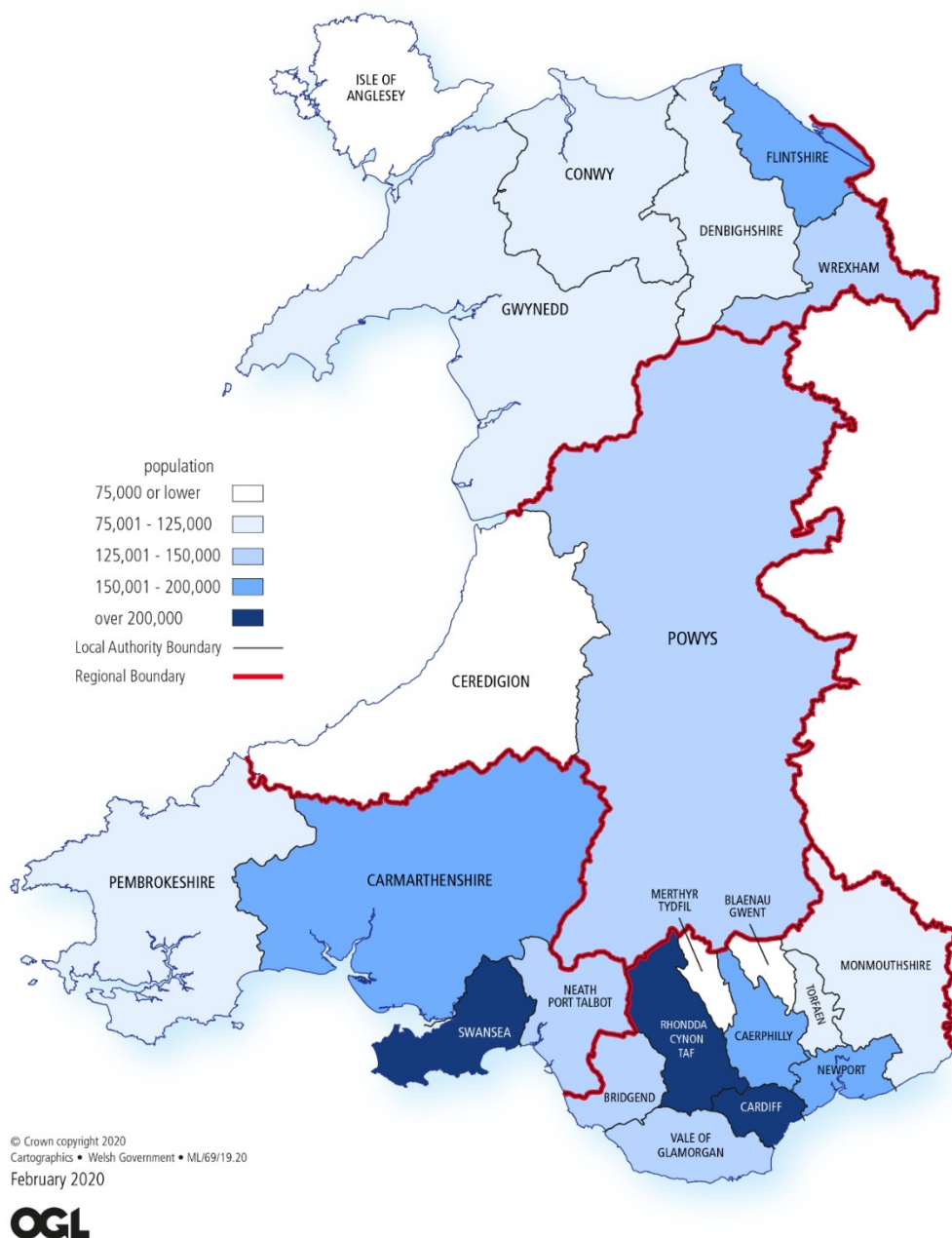
This release is one of five statistical outputs summarising statistics on nine key topics for Wales and four Welsh regions (North Wales, Mid Wales, South West Wales and South East Wales). Together these releases have been prepared to inform regional planning, supporting the National Infrastructure Commission for Wales, the National Development Framework and the Economic Action Plan.

### In this release

Population	2
Health	10
Employment	12
Transport	18
Environment	22
Prosperity	27
Digital Infrastructure	31
Housing	35
Culture & Heritage	37
Quality Information	39

# Population

Figure 1: Population, by local authority, 2018



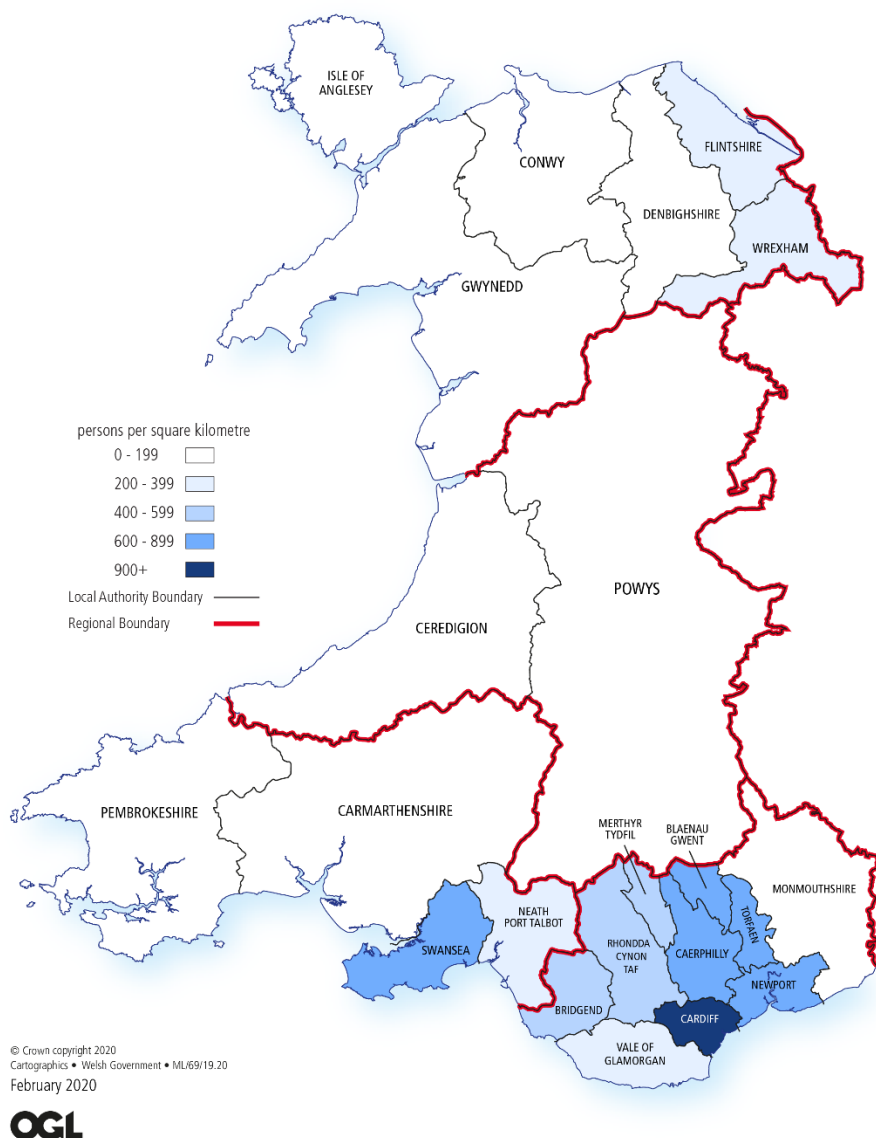
Source: Mid-year population estimates, Office for National Statistics

In 2018, Wales was home to [over 3,138,000 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 364,000 residents in 2018, 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.

Note: These reports were produced ahead of the publication of provisional 2019 mid-year estimates on 6 May 2020.

**Figure 2: Population density (persons per square kilometre), by local authority, 2018**



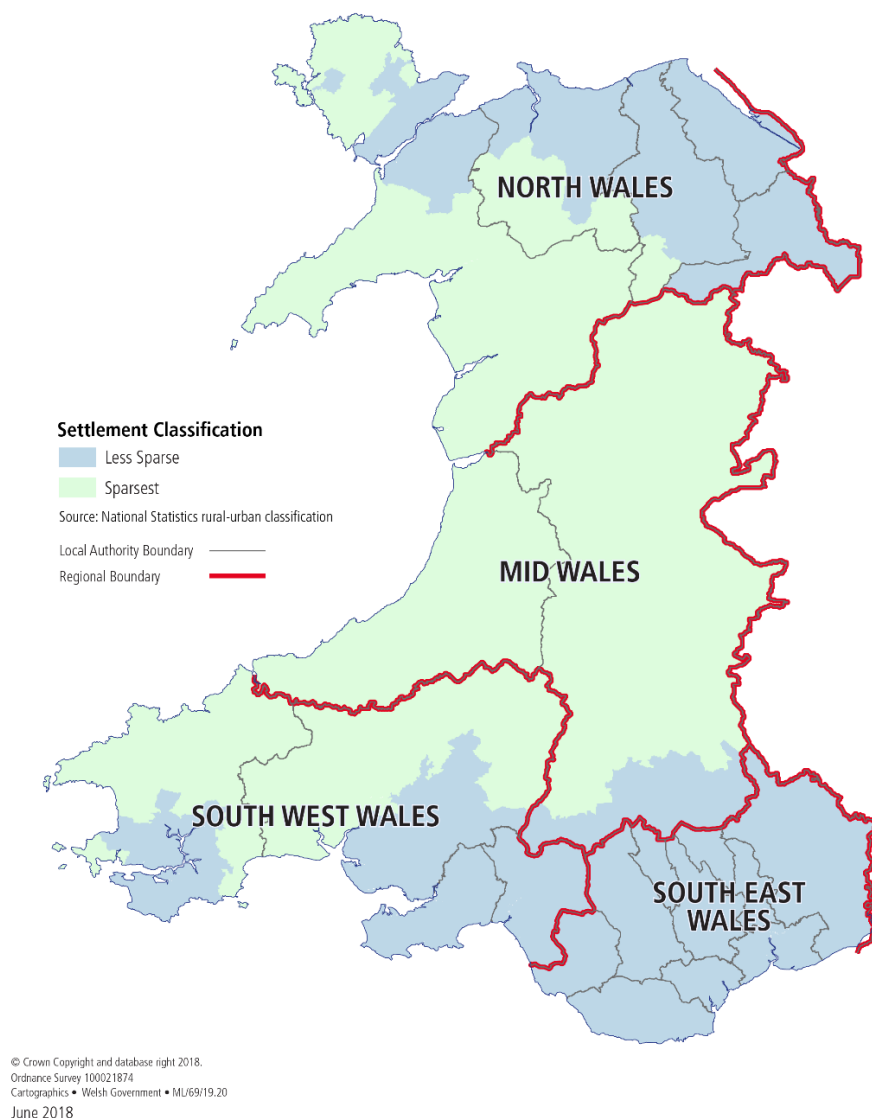
Source: Mid-year population estimates, Office for National Statistics; Standard area measurements, Office for National Statistics

In 2018, Wales had an [average population density](#) of 151.4 persons per square kilometre; this is a 3.6 per cent increase since 2008. South East Wales had by far the highest population density of the four regions, at 545.5 persons per square kilometre. This can largely be attributed to Cardiff, which was the most densely populated authority in Wales at 2,585.2 persons per square kilometre. The region also saw the most growth in population density over the last decade, up 5.1 per cent on 2008.

Mid Wales was the least densely populated of the four regions, with only 29.5 persons to each square kilometre. The region contained the least densely populated local authority in Wales, which was Powys, at 25.6 persons per square kilometre. Mid Wales was the only region with a fall in population density in the 2008-2018 period, at 1.2 per cent.

Note: These reports were produced ahead of the publication of provisional 2019 mid-year estimates on 6 May 2020.

**Figure 3: Settlements in Wales by rural-urban classification, 2011**



Source: 2011 Census, National Statistics

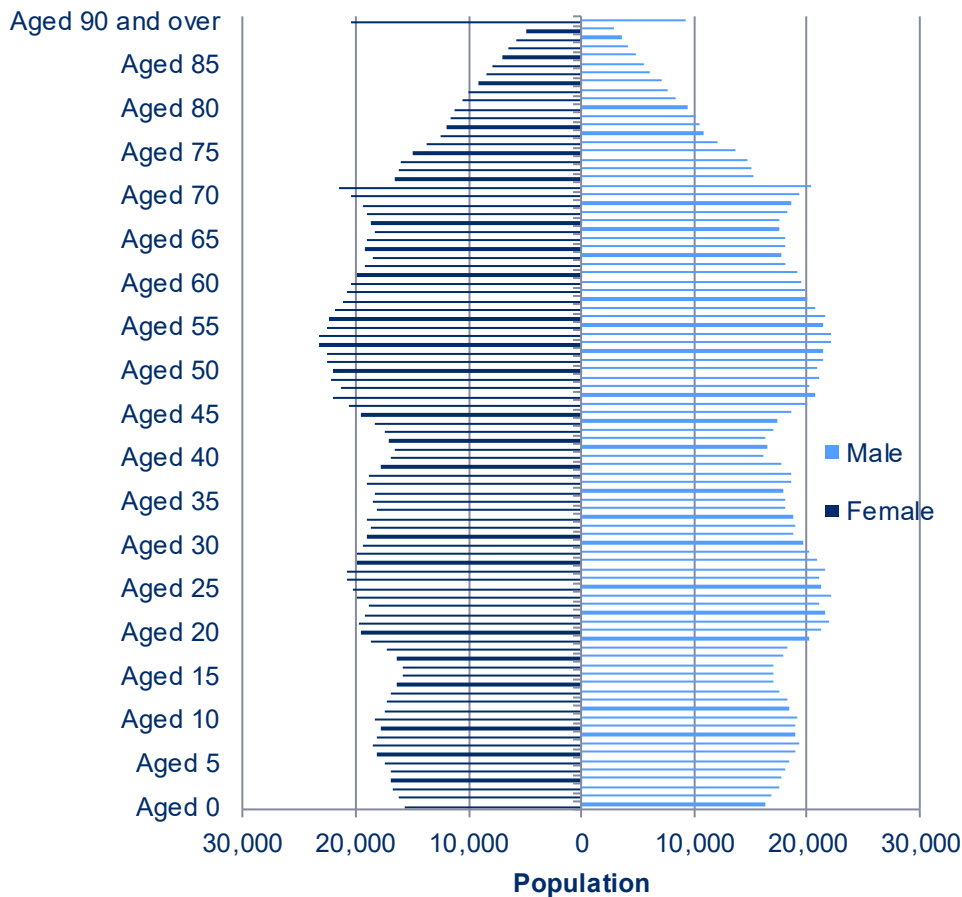
Welsh Government analysis of 2011 Census data (unpublished) shows that while there are fairly even numbers of people living in each category of settlement in Wales (as defined by population), the distribution of these different categories of settlements across Wales is not even.

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 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](#) and in the [Rural Wales: definitions and how to choose them](#) releases.

Note: These reports were produced ahead of the publication of provisional 2019 mid-year estimates on 6 May 2020.

**Figure 4: Population distribution in Wales by age and gender, 2018**

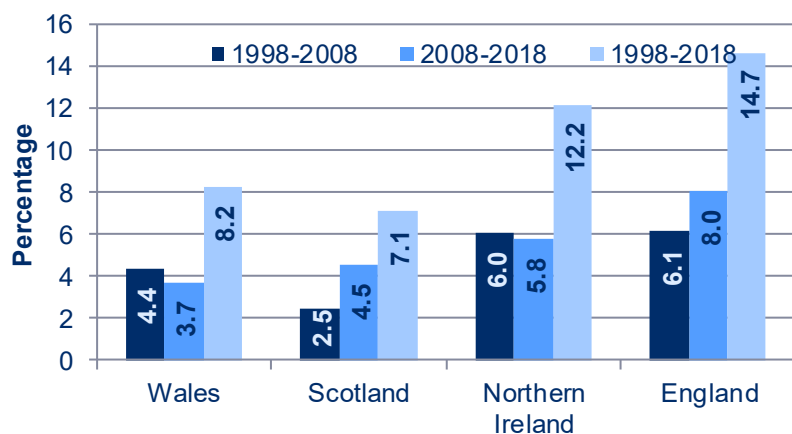


Source: Mid-year population estimates, Office for National Statistics

Wales as a whole has an [ageing population](#). Between 1998 and 2018, the proportion of the population [aged 65 and over](#) has increased from 17.4 per cent to 20.8 per cent, while the proportion of the population aged 15 and under has fallen from 20.6 per cent to 17.9 per cent. Of the four regions, South East Wales has the most even population distribution across its age groups. Across Wales, for each year of age between 0 and 30, there are more males than females. However, males are outnumbered by females at almost every year of age after the age of 30.

Note: These reports were produced ahead of the publication of provisional 2019 mid-year estimates on 6 May 2020.

**Figure 5: Percentage population change by UK country, 1998-2018**



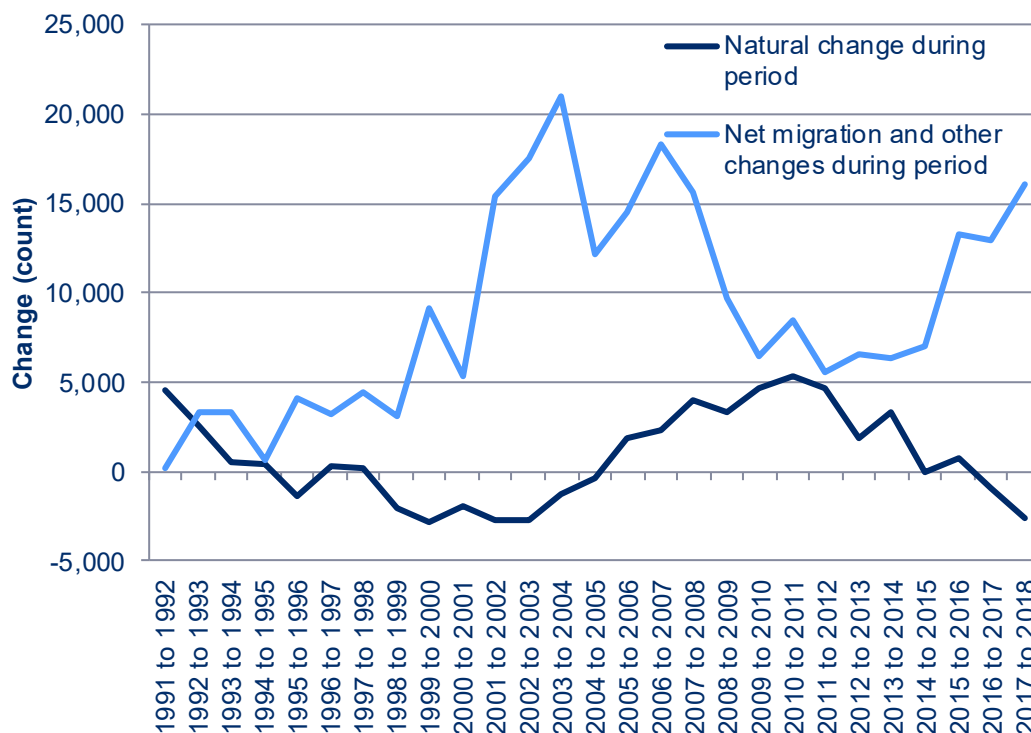
Source: Mid-year population estimates, Office for National Statistics

[Wales' population grew by 8.2 per cent in the period 1998-2018](#). This was lower than in England and in Northern Ireland, but higher than in Scotland. When considering the 2008-2018 period, however, the percentage change in population in Wales was the lowest in the UK, at 3.7 per cent.

Within Wales, the South East Wales region saw the largest population growth between 1998 and 2018, at 9.6 per cent. The lowest was Mid Wales, at 3.8 per cent. Over the 2008-2018 period, Cardiff's population grew more than any other local authority in Wales (9.5 per cent). Ceredigion's population, however, contracted by 2.6 per cent over the same period. This was the greatest population contraction in Wales.

Note: These reports were produced ahead of the publication of provisional 2019 mid-year estimates on 6 May 2020.

**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](#) 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, Carmarthenshire saw the largest net change in population due to migration and other changes during the 2017-18 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. Cardiff was the local authority with the highest level of natural change in 2017-18 while 16 of the 22 authorities experienced negative natural change, meaning deaths were higher than births. The highest level of negative natural change was in Carmarthenshire.

Note: These reports were produced ahead of the publication of provisional 2019 mid-year estimates on 6 May 2020.

**Figure 7: Stated Welsh-speaking ability of persons aged three and over by region, 2011**



Source: 2011 Census, Office for National Statistics

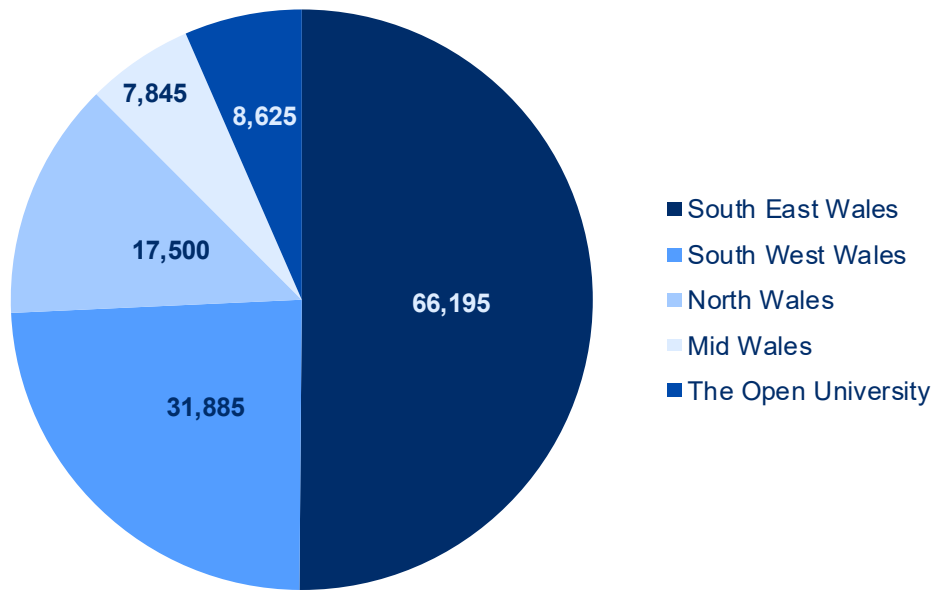
According to [census data](#), there were 562,016 Welsh-speakers aged three and over in Wales in 2011. 27 per cent of Welsh speakers were based in South East Wales, 36 per cent in North Wales, 10 per cent in Mid Wales and 26 per cent in South West Wales. However, the distribution of Welsh speakers across 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 September 2019, an estimated 29.0 per cent of people aged three and over across Wales reported being able to speak Welsh. This represented an increase of approximately 3.4 percentage points on the data for the year ending September 2009. The local authority with the highest proportion of Welsh speakers was Gwynedd, where around 75.6 per cent of residents aged three and over reported being able to speak Welsh in 2019.



**Figure 8: Student enrolments to Higher Education Institutions in Wales by region, 2018-2019**



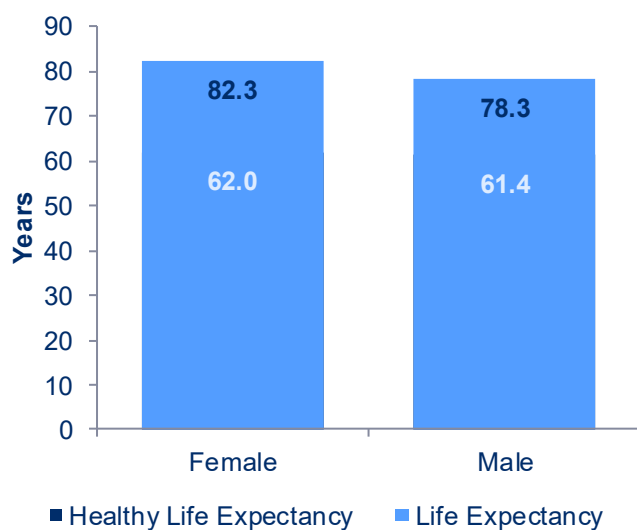
Source: Higher education student record, Higher Education Statistics Agency

In 2018-19, there were 132,210 [enrolments on Higher Education \(HE\) courses](#) in Wales. Half of all enrolments were in South East Wales. Cardiff University saw the highest number of HE enrolments, representing 25.1 per cent of total enrolments. Mid Wales was the region with the lowest number of enrolments for HE courses in its institution as this considered only Aberystwyth University (7,845 enrolments).

In addition to these figures, there are 165 enrolments in NPTC group, but given that this provider is spread across multiple college campuses, it is not possible to split these between South West and Mid Wales. The NPTC group is a further education college which was formed following the merger of Neath Port Talbot College and Coleg Powys on 1 August 2013.

## Health

**Figure 9: Healthy life expectancy in Wales as a proportion of life expectancy, by gender, 2016-18**



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

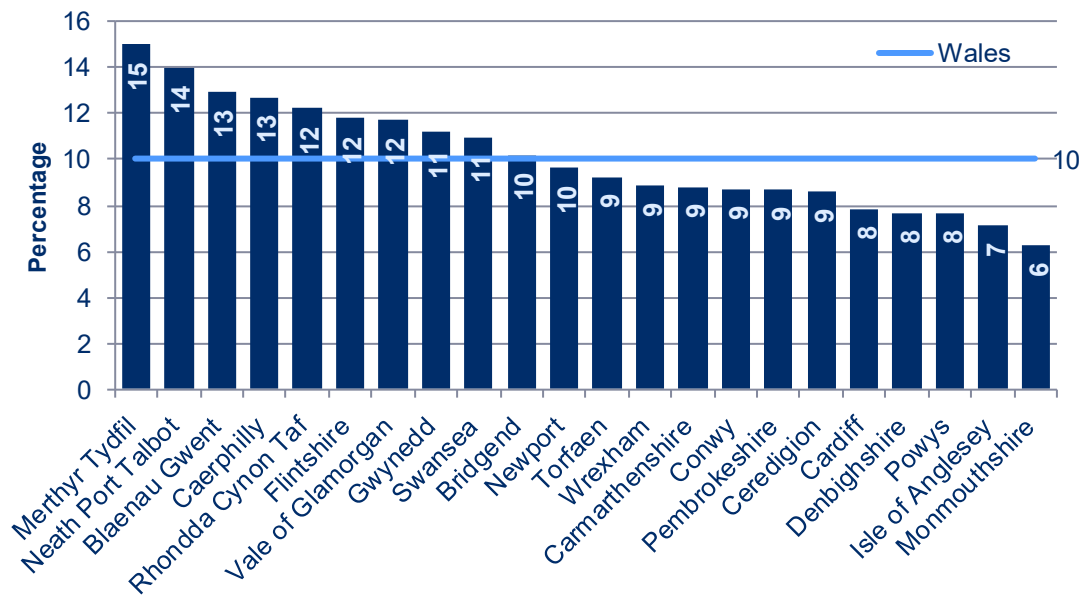
Life expectancy is a measure of how long, on average, people can expect to live using estimates of the population and the number of deaths. Healthy life expectancy estimates the number of years spent in very good or good general health.

[ONS data](#) shows that across Wales, females born in 2016-18 were expected on average to live around 4 years longer than males. For females, life expectancy was 82.3 years, for males it was 78.3 years. The gender gap narrows when considering healthy life expectancy in Wales, with females and males spending on average 62.0 and 61.4 years respectively in good health (that is 75.4 per cent and 78.4 per cent of their respective life expectancies).

Life expectancy figures for Wales were lower than the UK averages over this period (82.9 years for females and 79.3 years for males).

For local authorities in Wales, life expectancy at birth for males was highest in Monmouthshire and lowest in Blaenau Gwent – a difference of 4.5 years. For females, it was highest in Monmouthshire and Ceredigion and lowest in Merthyr Tydfil and Blaenau Gwent, a difference of 3.6 years. Healthy life expectancy at birth for males was highest in Monmouthshire and lowest in Blaenau Gwent – a difference of 10.9 years. For females, it was highest in Powys and lowest in Caerphilly – a difference of 12.5 years.

**Figure 10: Adults with fewer than 2 healthy lifestyle behaviours, by local authority, 2017-18 and 2018-19\* combined (age standardised)**



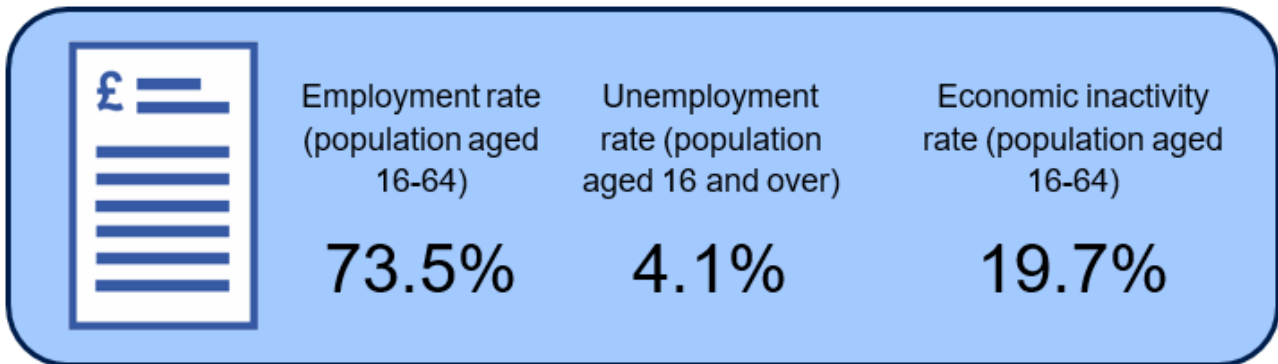
\*The 2017-18 and 2018-19 periods have been combined for data quality purposes

Source: National Survey for Wales

The [5 healthy lifestyle 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.

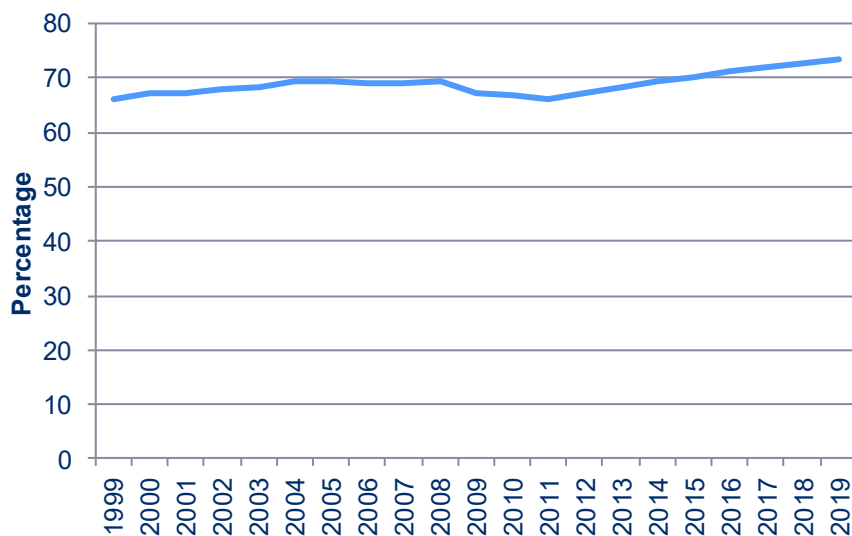
Across Wales in 2017-18 and 2018-19 combined, 10 per cent of adults reported fewer than 2 of the 5 healthy lifestyle behaviours. There was no significant difference between the 4 regions. At local authority level, the figures ranged from 6 per cent in Monmouthshire to 15 per cent in Merthyr Tydfil.

## Employment



Source: Annual Population Survey, Office for National Statistics. Data relates to year ending 30 September 2019

**Figure 11: Employment rate in Wales, 1999-2019**



Notes:

Data for 1999 to 2003 is year ending 28 February. Data for 2004 is year ending 31 December 2004. Data from 2005 onwards is year ending 30 September.

Source: Annual Population Survey

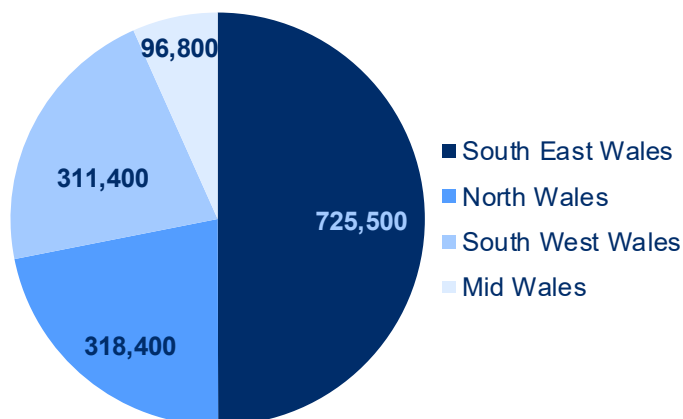
The employment level is the total number of people (aged 16+) that are in employment and the [employment rate](#) is the percentage of the population (aged 16-64) that is in employment. In Wales, in the year ending 30 September 2019, the employment rate was 73.5 per cent, with an employment level of around 1.47 million people. This rate increased by 6.4 percentage points since 2009 and has grown faster than the UK rate since 2001, although it is still lower than the UK rate of 75.6 per cent. At a regional level, Mid Wales, South West Wales and South East Wales had rates below both the UK and the Welsh employment rates, while North Wales exceeded both.

The unemployment level is the total number of people who are unemployed and the [unemployment rate](#) 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 September 2019, the unemployment rate was 4.1 per cent, which is an unemployment level of 63,100 people. This rate was down 4.0 percentage points on the unemployment rate ten years previously, but is higher than the UK unemployment rate of 3.9 per cent. The highest unemployment rate was in South West Wales, and the lowest in Mid Wales.

The [economic inactivity rate](#) 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 19.7 per cent, which corresponds to an economic inactivity level of 342,700 people. This rate was down 3.9 percentage points on ten years previously. The economic inactivity rate for Wales and all four regions is higher than the UK rate, which was 17.4 per cent for the year ending 30 September 2019.

More information on regional economic statistics can be found in the Welsh Government’s [regional economic and labour market profiles](#).

**Figure 12: Workforce employment by region, 2018**

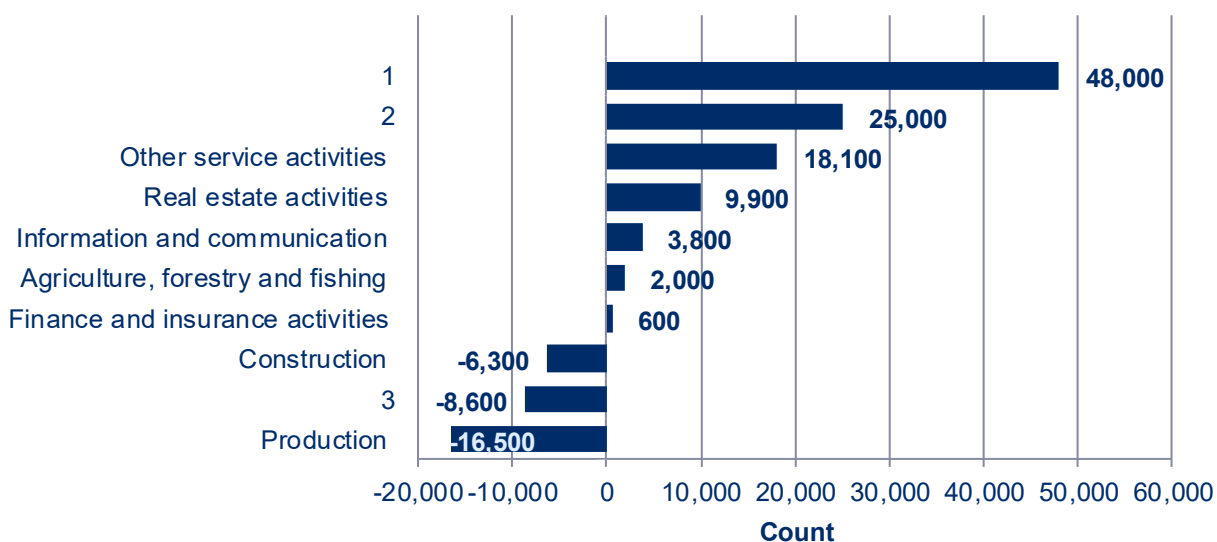


Source: Annual Population Survey, Office for National Statistics; Business Register Employment Survey (BRES), Office for National Statistics

Across Wales, half of [workplace employment \(or total jobs\)](#) 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](#): Public administration, defence, education and health; and Wholesale, retail, transport, hotels and food. Real estate activities represented the smallest sector across Wales.

**Figure 13: Change in workplace employment in Wales by sector (count), 2008-2018**



**Key**

1 Professional, scientific and technical activities; administrative and support service activities

2 Public administration, defence, education and health

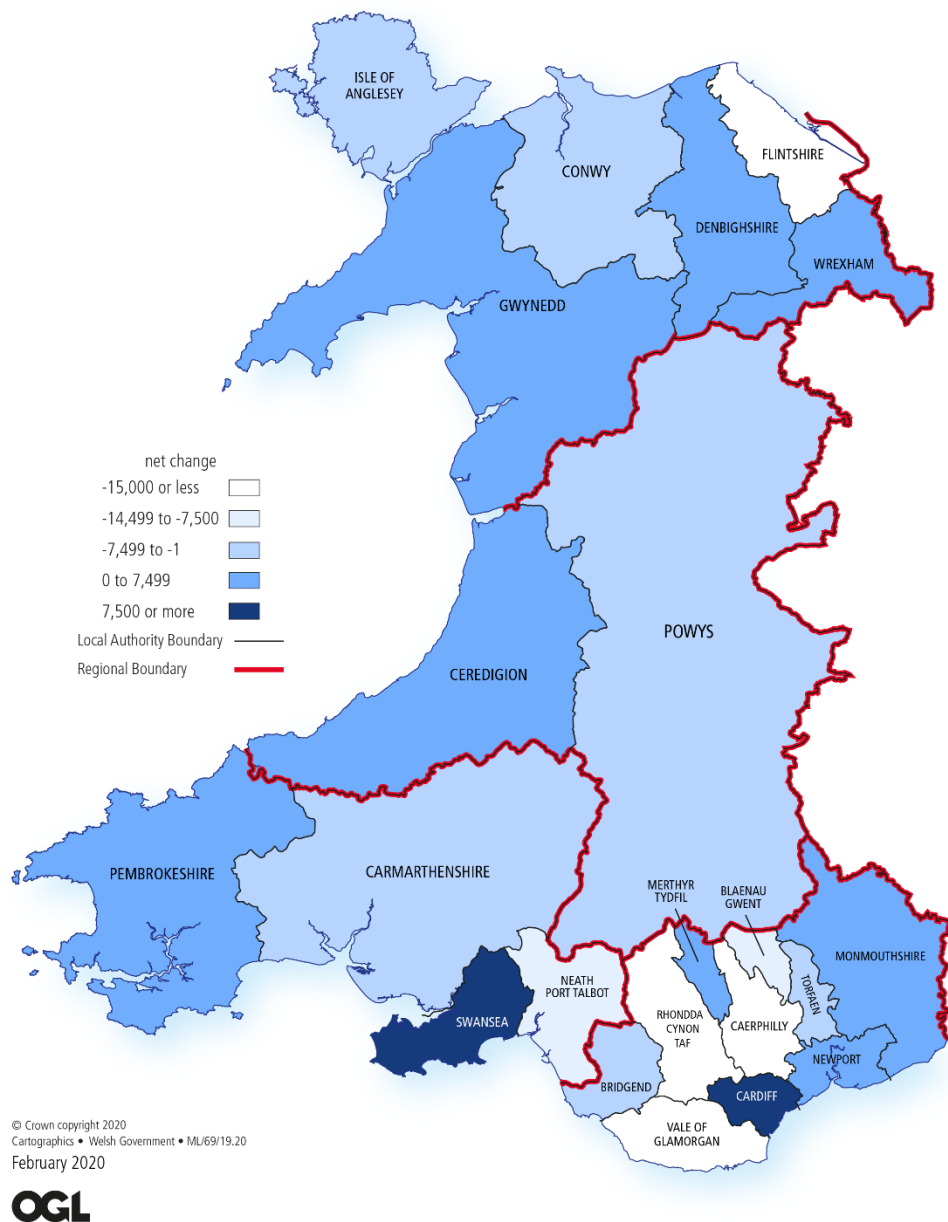
3 Wholesale, retail, transport, hotels and food

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

The fastest-growing sectors between 2008 and 2018 were Professional, scientific and technical services, administrative and support duties; and Public administration, defence, education and health. Professional, scientific and technical services, administrative and support duties held the top position for workplace employment growth as a count between 2008 and 2018. The smallest of the sectors across Wales, real estate activities, saw the largest increase in employment between 2008 and 2018, in percentage terms.

[Size analysis of Welsh businesses data](#) shows that in 2019, across Wales, the vast majority of enterprises had fewer than 10 employees. Around 64 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, Forestry and Fishing.

**Figure 14: Change in local authority population due to people commuting in and out for work, 2018**



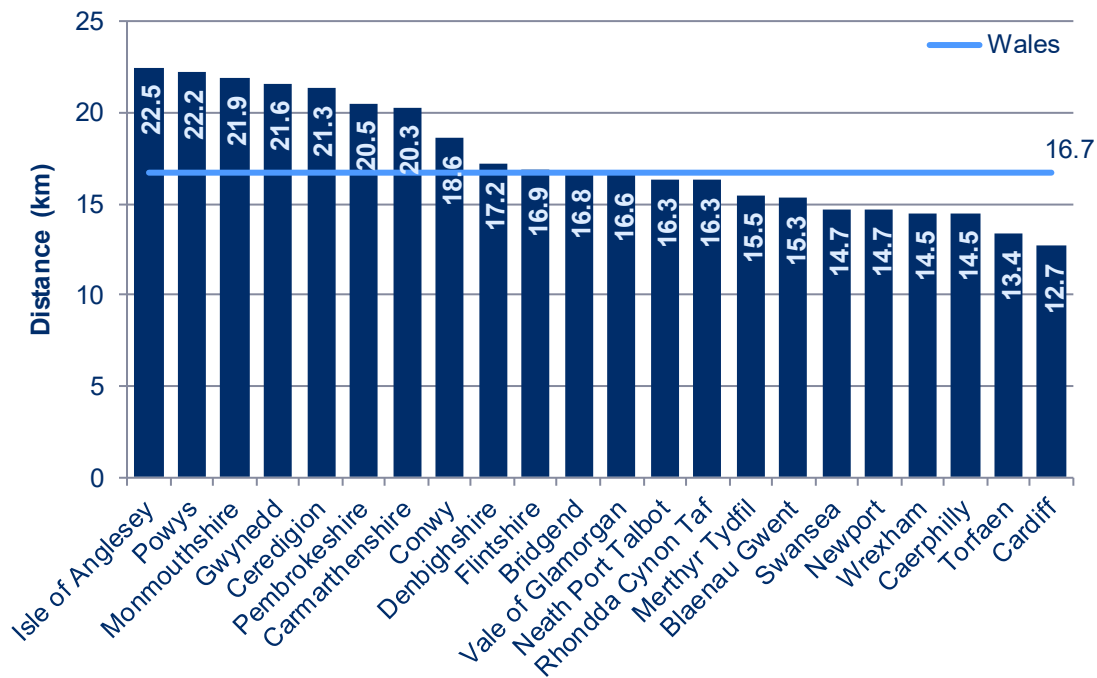
Source: Annual Population Survey, Office for National Statistics

For Wales as a whole, there was a net worker population change of -47,700 workers, indicating that more people commute out of Wales than in.

The [net worker population change](#) was negative in 12 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 2 most highly populated authorities in Wales were also those with the highest net levels of worker population change.

All four Welsh regions include at least 1 local authority 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.

**Figure 15: Average distance travelled to work (km) by workers aged 16-74 in 2011, by local authority of residence**

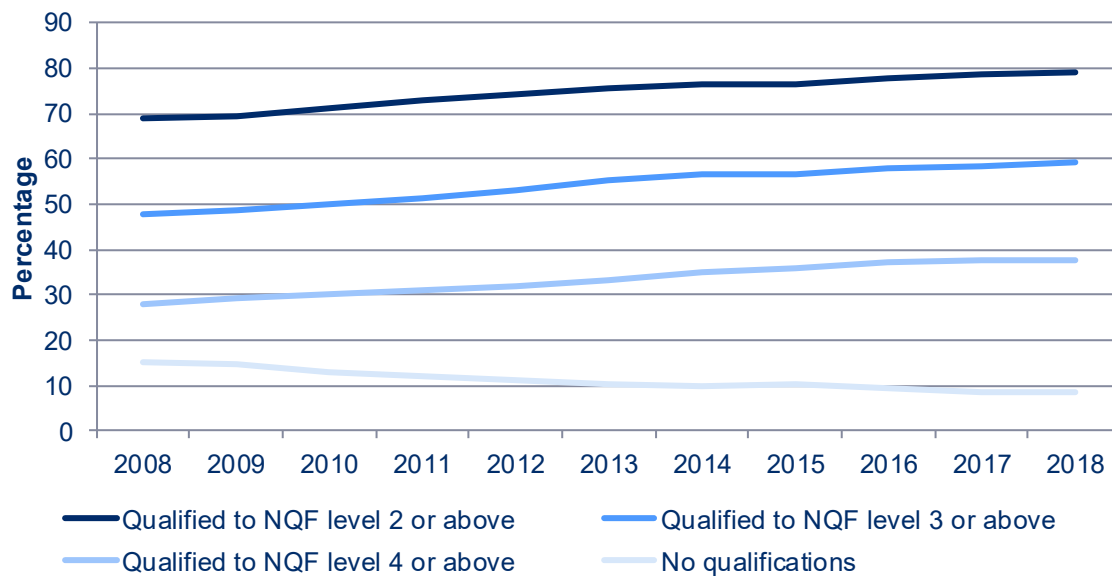


Source: 2011 Census, Office for National Statistics

[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.



**Figure 16: Highest qualification level of adults aged 18-64 in Wales, 2008-2018**



\*All data for year ending 31 December

Source: Annual Population Survey, Office for National Statistics

Between 2008 and 2018, the proportion of adults aged 18-64 across Wales with [no qualifications](#) has decreased from 15.2 per cent to 8.4 per cent. A decrease was seen in each of the local authorities in Wales, except in Flintshire, which saw an increase of one percentage point. Meanwhile, the proportion of those qualified to NQF level 2 or above has increased from 68.9 per cent to 78.9 per cent. The greatest change was in Caerphilly, which saw an increase of 16.5 percentage points. In 2018, 37.8 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 2018 period.

# Transport

Figure 17: Transport infrastructure in Wales



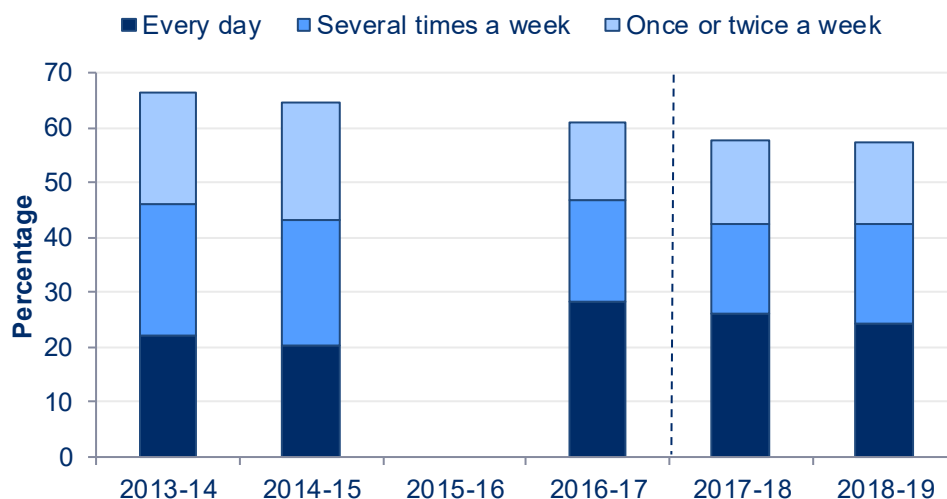
Source: Ordnance Survey

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

[Total freight traffic](#) at ports in Wales fell by 4.8 per cent in 2018 to 49.2 million tonnes (Mt), its lowest level since comparable records began in 1976. The three largest 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.

**Figure 18: Frequency of walking for active travel purposes among adults aged 16+ in Wales (a), (b)**



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

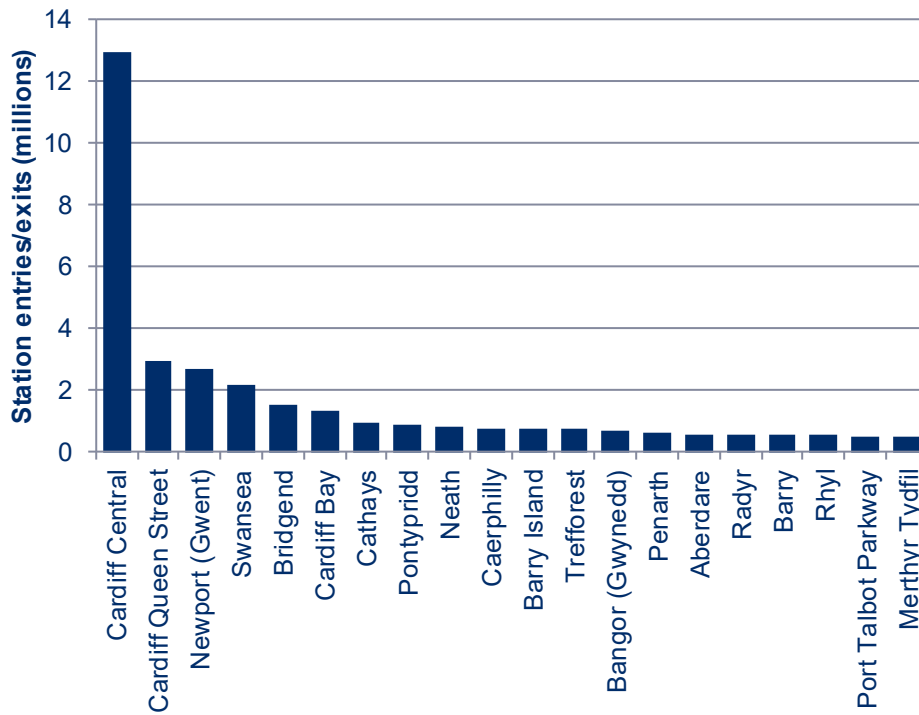
(b) The survey question changed in 2017-18 and the walking time was increased from 5 minutes to 10 minutes. This means that it is not possible to draw any comparisons with previous years.

Source: National Survey for Wales

Data from the [National Survey for Wales](#) shows that across Wales in 2018-19, 57 per cent of adults walked more than once a week for active travel purposes, and 6 per cent of all adults aged 16 and over cycled at least once a week for active travel purposes. 70 per cent of people in urban areas walked for more than 10 minutes as a means of transport at least once a month, compared with 56 per cent of people in rural areas. People in urban areas were also more likely to walk more frequently, with 28 per cent walking every day compared with 17 per cent in rural areas. This could be due to residents of urban areas having more destinations within walking distance than those living in rural areas.

Meanwhile, active travel data taken from the 2018-19 [National Survey for Wales](#) shows that 45 per cent of children travelled to primary school either by walking or by bike, compared to 33 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.

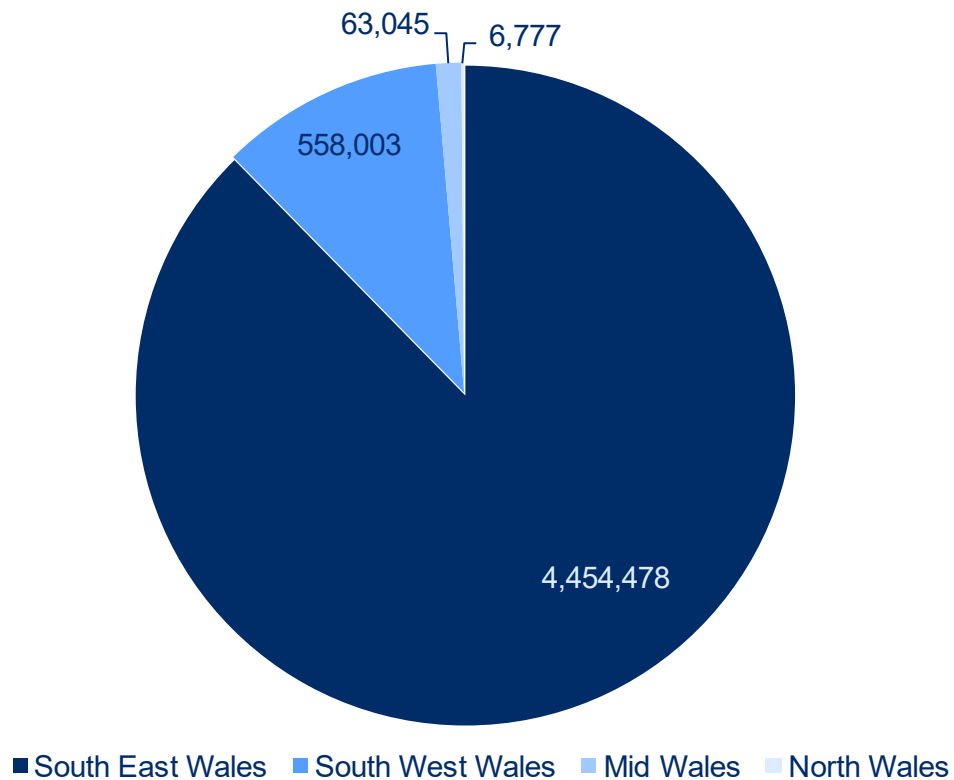
**Figure 19: 20 busiest rail stations in Wales by station entries/exits, 2017-18**



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 by station entries/exits in 2017-18 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 25 per cent of all station entries/exits in Wales in 2017-18.

**Figure 20: Net change in rail journeys by region, 2007-08 to 2017-18**



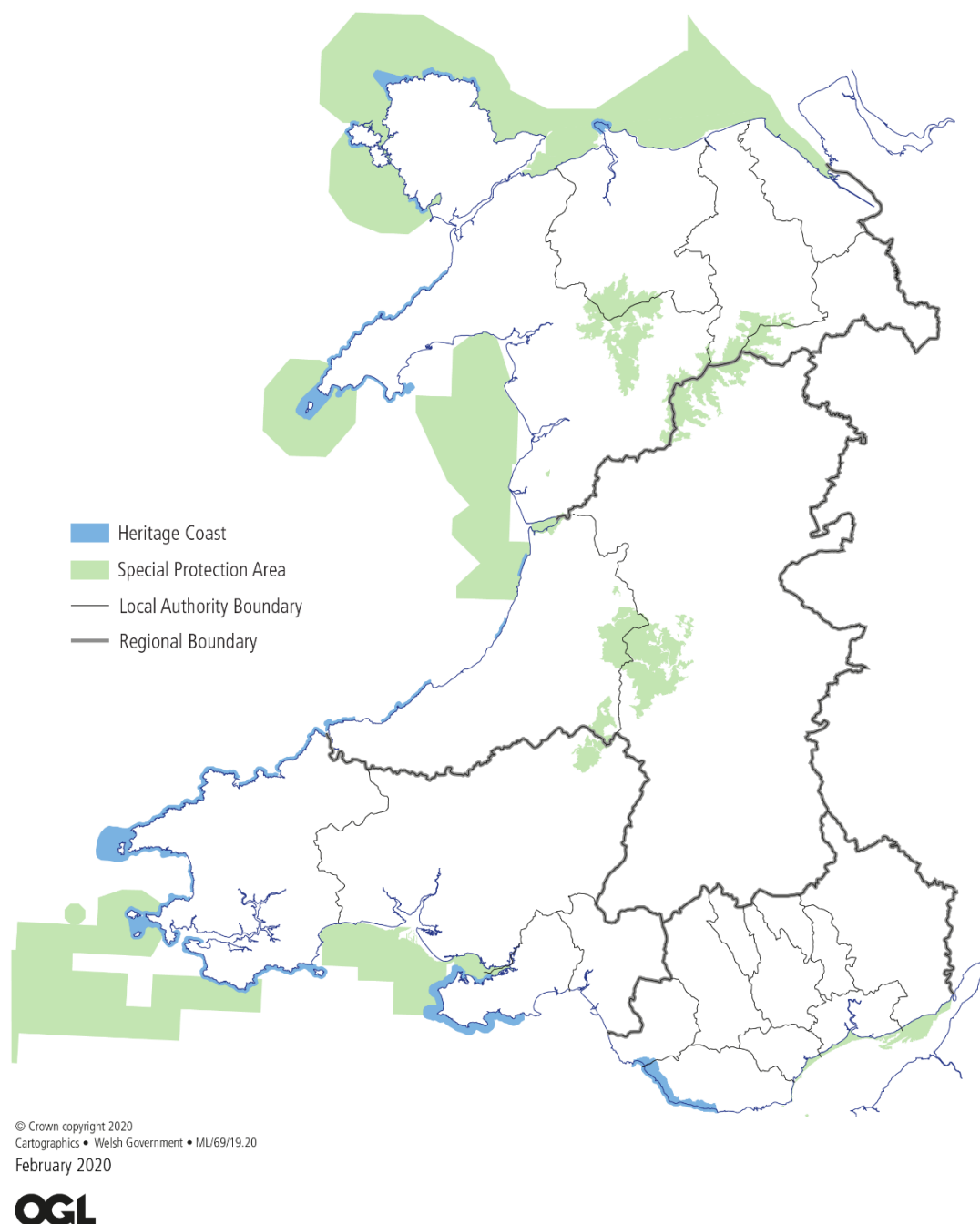
Source: National Rail Trends, Regional User Profiles, Office of Rail and Road

Across Wales, there were 52.5 million rail station entries/exits in 2017-18, accounting for 1.8 per cent of the UK total. Wales' rail station usage grew by 1.7 per cent in 2017-18 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](#) shows that the number of train journeys made in Wales increased by 30.0 per cent between 2007-08 and 2017-18. The majority of this increase was in journeys starting and/or finishing in South East Wales.

## Environment

Figure 21: Heritage Coast and Special Protection Areas in Wales

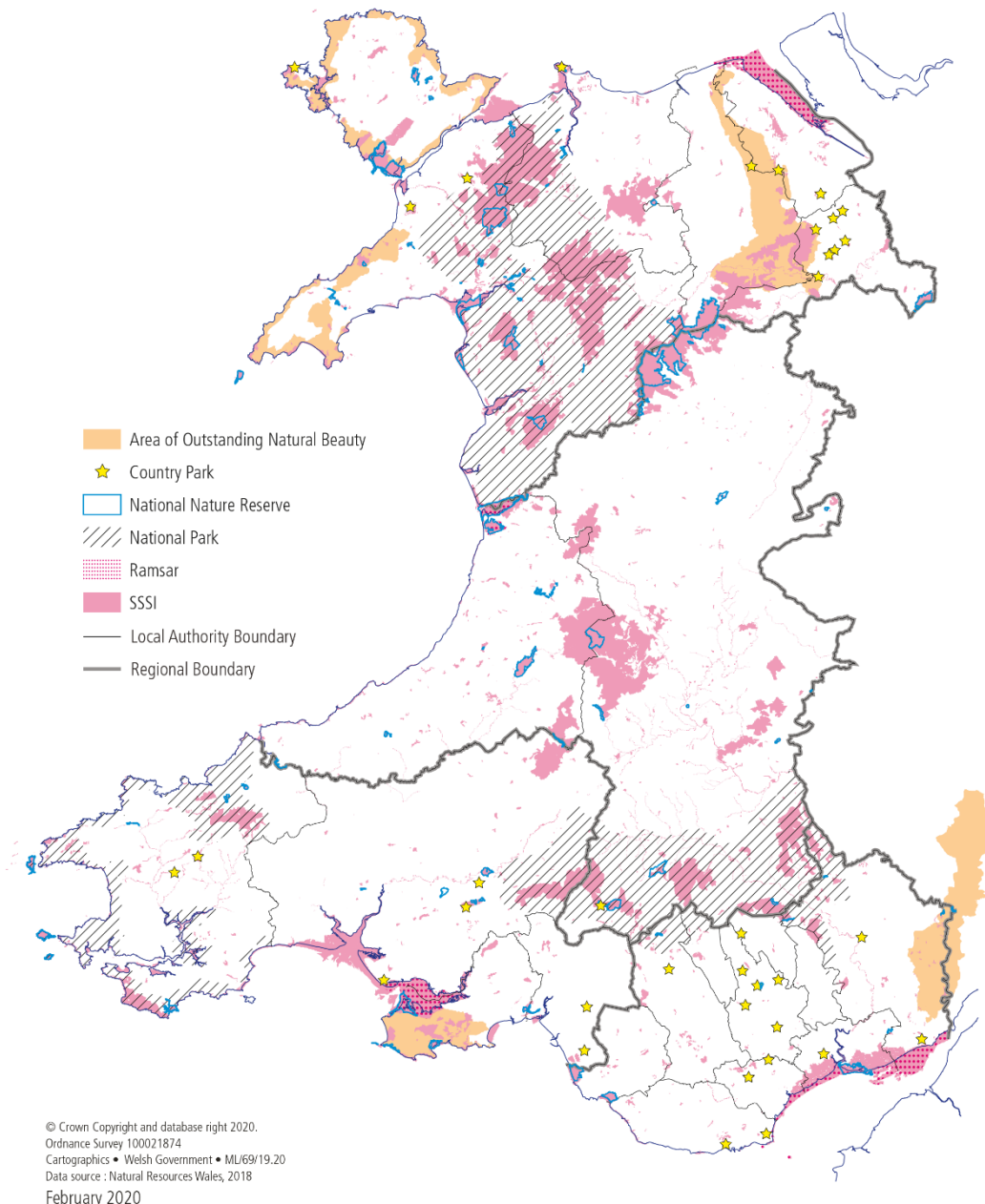


Source: Natural Resources Wales

[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.

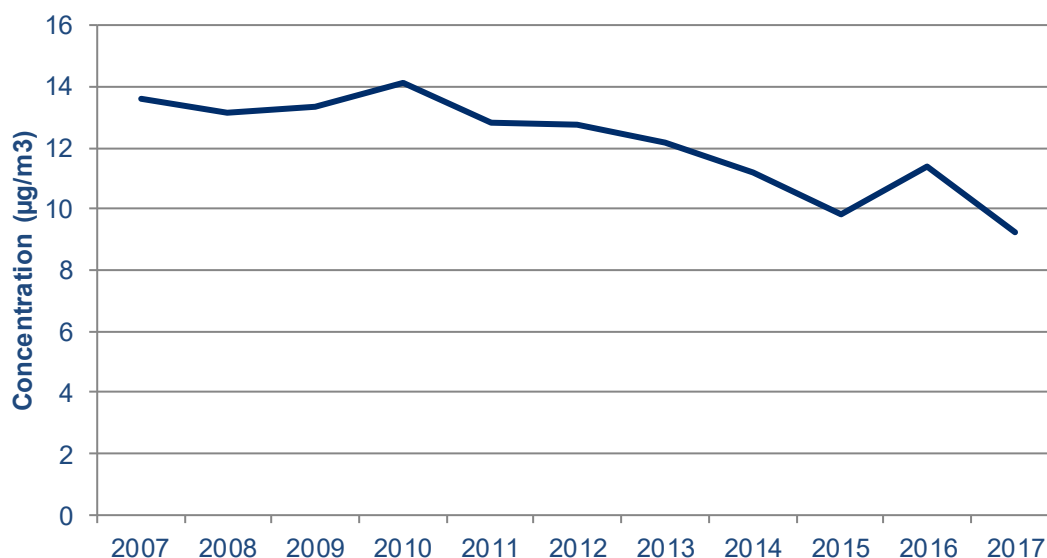
**Figure 22: Designated Natural Environment in Wales**



Source: Natural Resources Wales

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.

**Figure 23: Nitrogen dioxide (NO<sub>2</sub>) concentration in Wales over time**



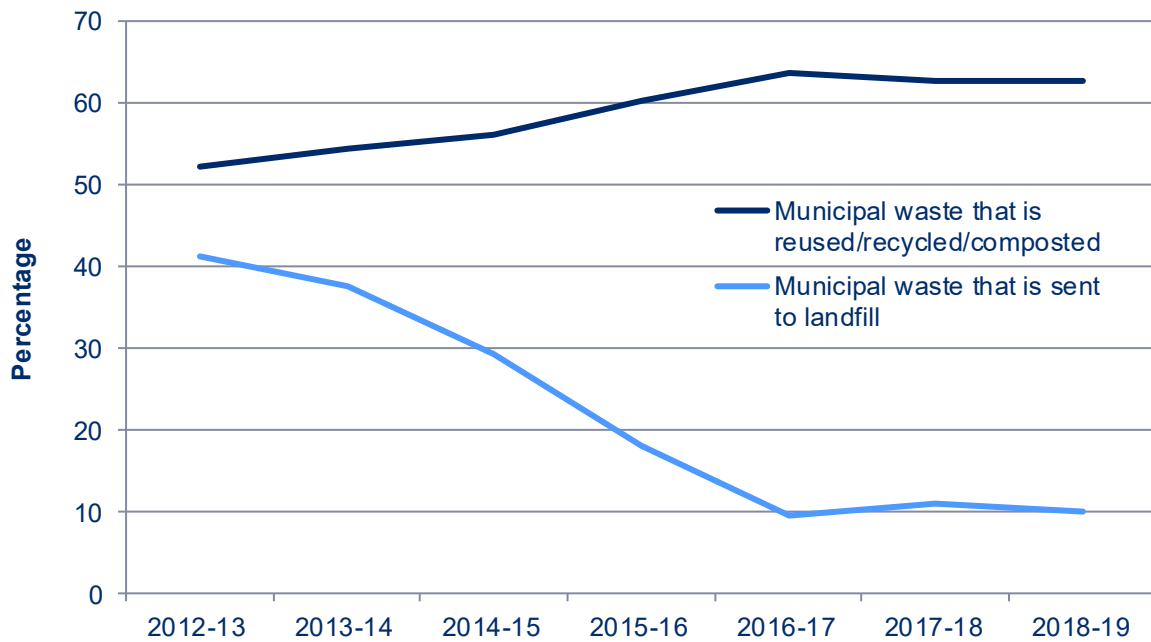
Source: Air Concentration, Department for Environment, Food and Rural Affairs; Small area population estimates (SAPE), Office for National Statistics; Geographical information, Welsh Government

Air pollution levels are gradually decreasing in Wales, with the average observed [nitrogen dioxide concentration](#) in Wales decreasing from 14 µg/m<sup>3</sup> in 2007 to 9 µg/m<sup>3</sup> 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/m<sup>3</sup>), with the lowest observed concentration of 4 µg/m<sup>3</sup> in Ceredigion and Powys. Newport observed the greatest change in nitrogen dioxide concentrations between 2007 and 2017, decreasing by 8 µg/m<sup>3</sup> over this period.

Renewable energy generation capacity has been increasing across Wales in recent years, with a capacity of 3,864 megawatts (MW) of [low-carbon energy](#) in 2018 through over 68,700 projects. 25 per cent of this capacity was in South West Wales, 21 per cent in South East Wales, 18 per cent in North Wales, and 16 per cent in Mid Wales. The remaining 19 per cent was offshore. 86 per cent of low-carbon energy projects in Wales were for solar energy (photovoltaic or thermal).



**Figure 24: Municipal waste treatment in Wales**



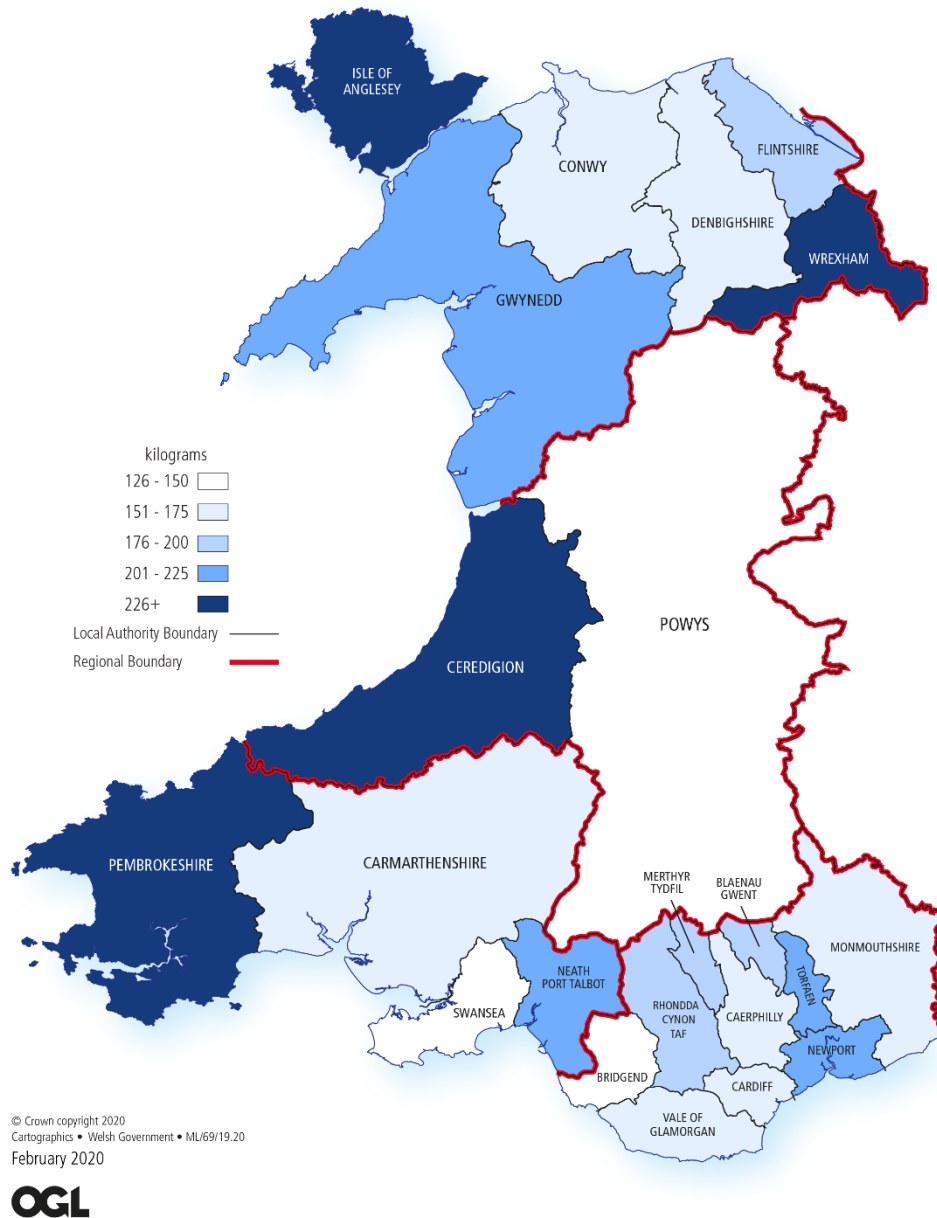
Source: WasteDataFlow, Natural Resources Wales

Between 2012-13 and 2016-17, household reuse, recycling and composting rates increased in Wales, while the percentage of municipal waste sent to landfill decreased. These proportions have remained fairly stable during the last three years.

In 2018-19, the amount of [local authority municipal waste](#) that was reused, recycled or composted was 63 per cent in Wales. This was 11 percentage points higher than in 2012-13.

Meanwhile, the amount of local authority municipal waste sent to [landfill](#) was 10 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.

**Figure 25: Annual residual household waste produced per person (kg), by local authority, 2018-19**

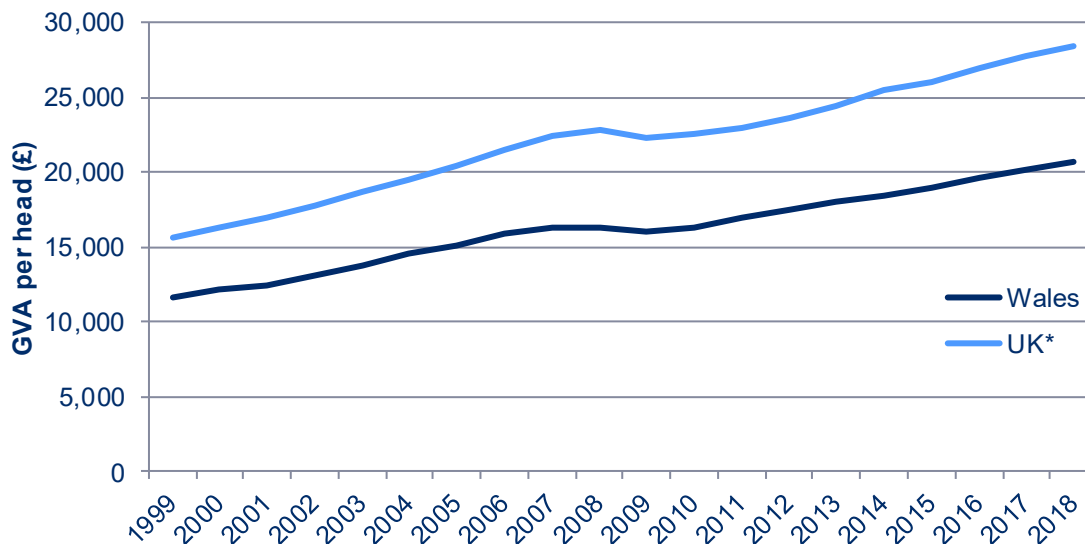


Source: WasteDataFlow, Natural Resources Wales

In 2018-19, the average person in Wales generated 180kg 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 17.1 per cent.

## Prosperity

Figure 26: GVA per head in Wales and the UK (£), 1999-2018



\*The UK total excluding any elements of household income that cannot be assigned to specific regions, i.e. elements that are extra-region. 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 2018 and [Gross Disposable Household Income \(GDHI\)](#) for 2017 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 2018, GVA per head in Wales was £20,738. This was a 2.9 per cent increase compared with 2017, and a 78.9 per cent increase on 1999. In 2018, South East Wales had the highest GVA per head of the Welsh regions and Mid Wales had the lowest GVA per head of the four regions.

GDHI is an estimate of the amount of money that households have available for spending or saving. In Wales, GDHI per head was £15,754 in 2017, up 1.0 per cent on the previous year, and 58.8 per cent higher than in 1999. The highest level of GDHI per head during 2017 was in Mid Wales, and the lowest was in South West Wales.

In 2019, the [median gross weekly earnings](#) of full-time employees across Wales were £535.00. This was an increase of £26.00 on 2018, but remained £49.90 lower than the UK median value. Comparing the regional data, the median wage in South East Wales in 2018 was £543.80 which was higher than South West Wales (£532.20), North Wales (£530.00), and Mid Wales (£505.60).

[ONS estimates](#) indicate that in 2019, 22.6 per cent of employees in Wales were earning below the living wage (£9.00 in 2019, as defined by the Living Wage Foundation). The estimate for the UK was 20.1 per cent. The highest proportion of employees earning below the living wage was in Gwynedd (31.4 per cent), and the lowest proportion was in the Vale of Glamorgan (16.4 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, 18.3 per cent of pupils aged 5-15 were eligible to receive free school meals in 2018/19, up 0.5 percentage points on 2008/09. This ranged from 19.2 per cent in South East Wales to 11.2 per cent in Mid Wales. North Wales saw the greatest increase in eligibility over the previous ten years (1.8 percentage points).

## Welsh Index of Multiple Deprivation

[The Welsh Index of Multiple Deprivation \(WIMD\)](#) 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, 22 per cent are in South West Wales, 7 per cent are in Mid Wales, and 22 per cent are in North Wales.

Considering the 191 most deprived LSOAs across all of Wales in 2019 – i.e. the 10 per cent most deprived, 66 per cent are in South East Wales, 21 per cent are in South West Wales, 1 per cent are in Mid Wales, and 12 per cent are in North Wales.

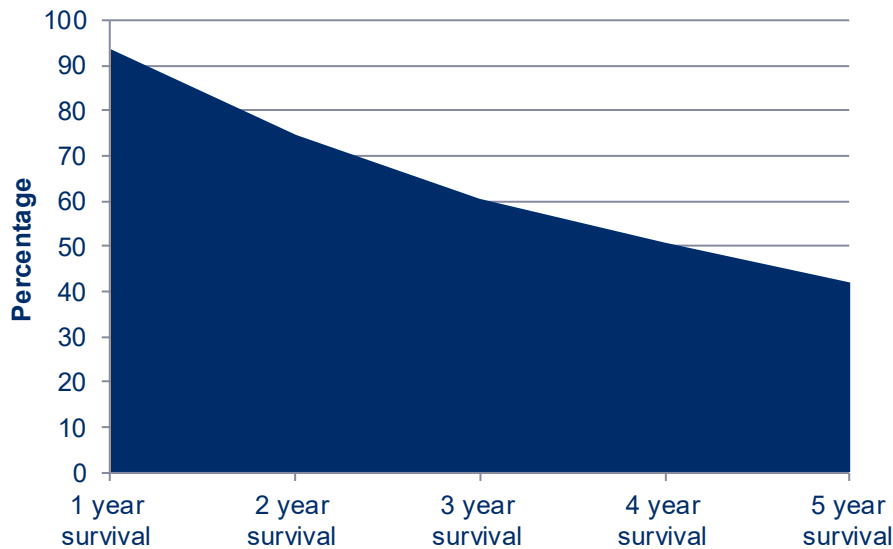
In WIMD 2019, there were pockets of high relative deprivation in the South Wales valleys and large cities, and in some North Wales coastal and border towns.

WIMD was last updated in November 2019, and [the interactive tool](#) provides further statistical breakdowns by Welsh City Region / Growth Deal Area.

## Enterprises

Welsh enterprises had a high birth rate and a low death rate compared to the rest of the UK in 2018. There were 14,045 [enterprise births](#) in Wales in 2018, giving it an enterprise birth rate of 13.3 per cent of total enterprise stock, the joint third highest rate of the twelve UK countries and regions (same as West Midlands). The UK birth rate was 12.9 per cent. There were 10,950 business deaths in Wales in 2018 which is a rate of 10.4 per cent of enterprise stock. This was the fourth lowest rate amongst the twelve UK countries and regions (with the North West of England having the highest at 13.5 per cent). The UK death rate was 11.4 per cent.

**Figure 27: Survival rates of Welsh businesses founded in 2013 (2018 data)**

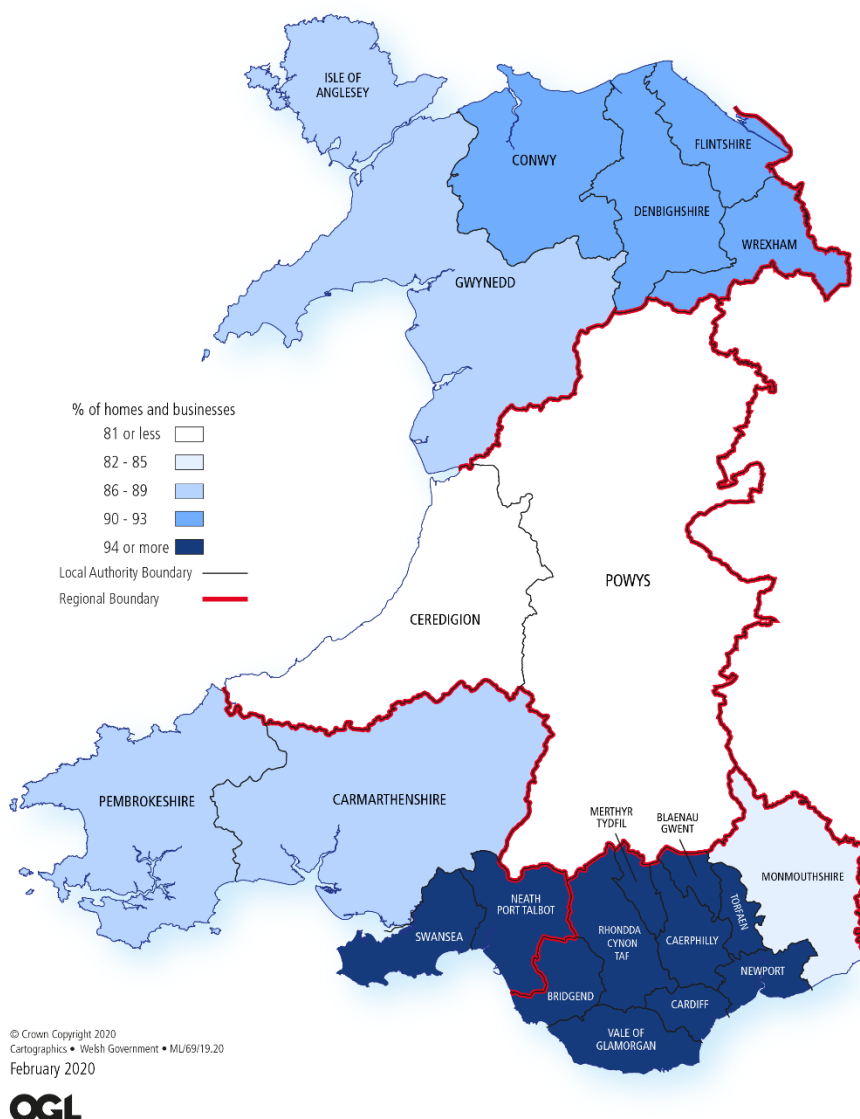


Source: Business Demography, Office for National Statistics

Of businesses started in Wales in 2013, 93.6 per cent [survived their first year](#), 60.6 per cent were still in business after 3 years, and 42.0 per cent were still operating after 5 years. The data indicates that the Isle of Anglesey was the local authority with the highest proportion of businesses surviving the first five years (50.0 per cent) and Merthyr Tydfil had the lowest five-year survival rate in Wales (26.7 per cent).

## Digital Infrastructure

**Figure 28: Percentage of homes and businesses with superfast and ultrafast broadband availability by local authority, September 2019**



Source: Connected Nations Report, the Office of Communications

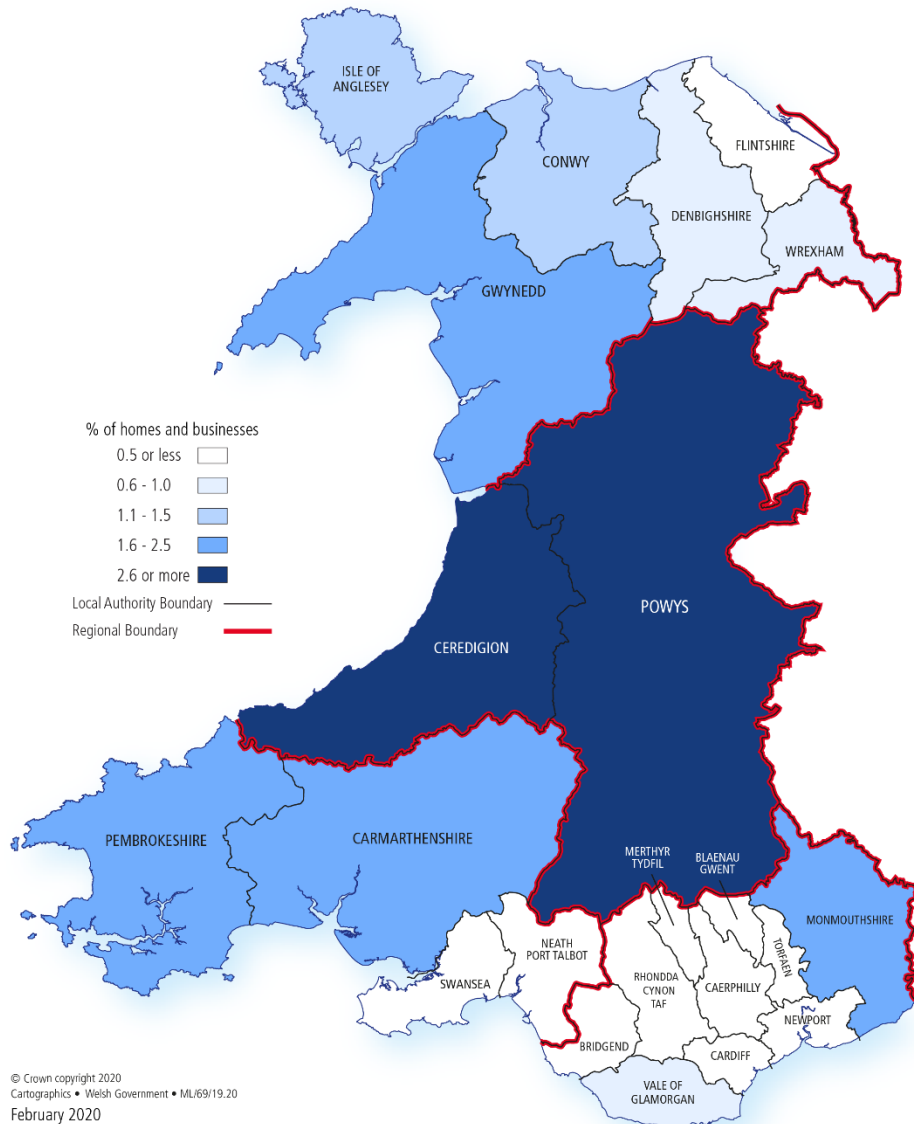
In September 2019, Wales was broadly in line with the rest of the UK in terms of [access to a superfast broadband speed \(30Mbit/s or higher\)](#), with an access rate of 93 per cent of premises (homes and businesses), compared to 94 per cent across the UK. For Wales, this was the same as 2018.

31 per cent of Welsh homes and businesses were able to access an ultrafast fixed broadband speed in September 2019. This was an increase of 2 percentage points on 2018, yet remained lower than the UK rate of 52 per cent.

Access to [full fibre services](#) in Welsh homes and businesses was 11 per cent in September 2019, 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 31.5 Mbit/s in both Mid Wales regions, Powys and Ceredigion to 76.1 Mbit/s in Cardiff. From a regional perspective, South East Wales and 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.

**Figure 29: Percentage of homes and businesses in Wales not meeting the Universal Service Obligation, by local authority, September 2019**



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 February 2020

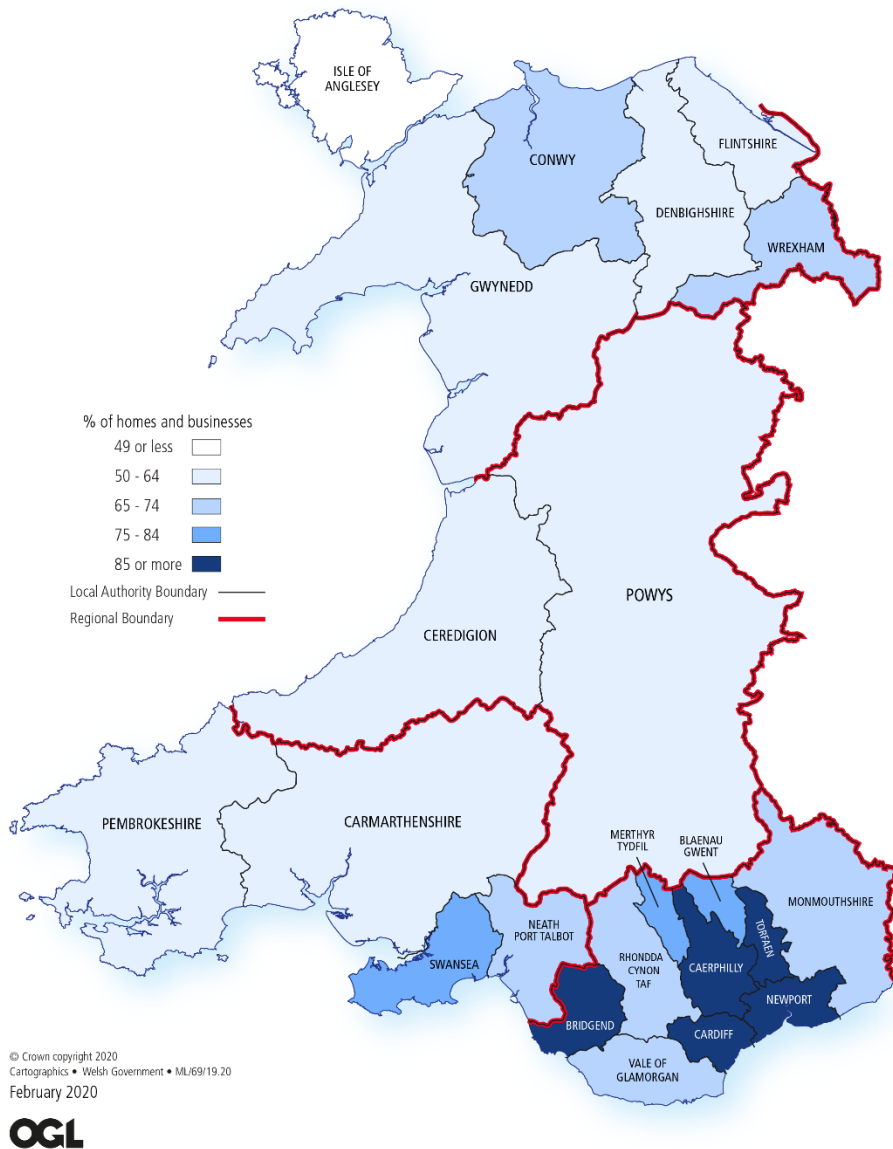


Source: Connected Nations Report, the Office of Communications

Across Wales, 15,600 homes and businesses (1.0 per cent) did not meet the Universal Service Obligation minimum in September 2019, meaning that they were unable to access a download speed of 10Mbit/s and an upload speed of 1Mbit/s. This is lower than last year (48,200 homes and businesses, 3.3 per cent), but is still above the UK level of 0.5 per cent.



**Figure 30: Percentage of homes and businesses in Wales with indoor 4G coverage from all four network providers, by local authority, September 2019**

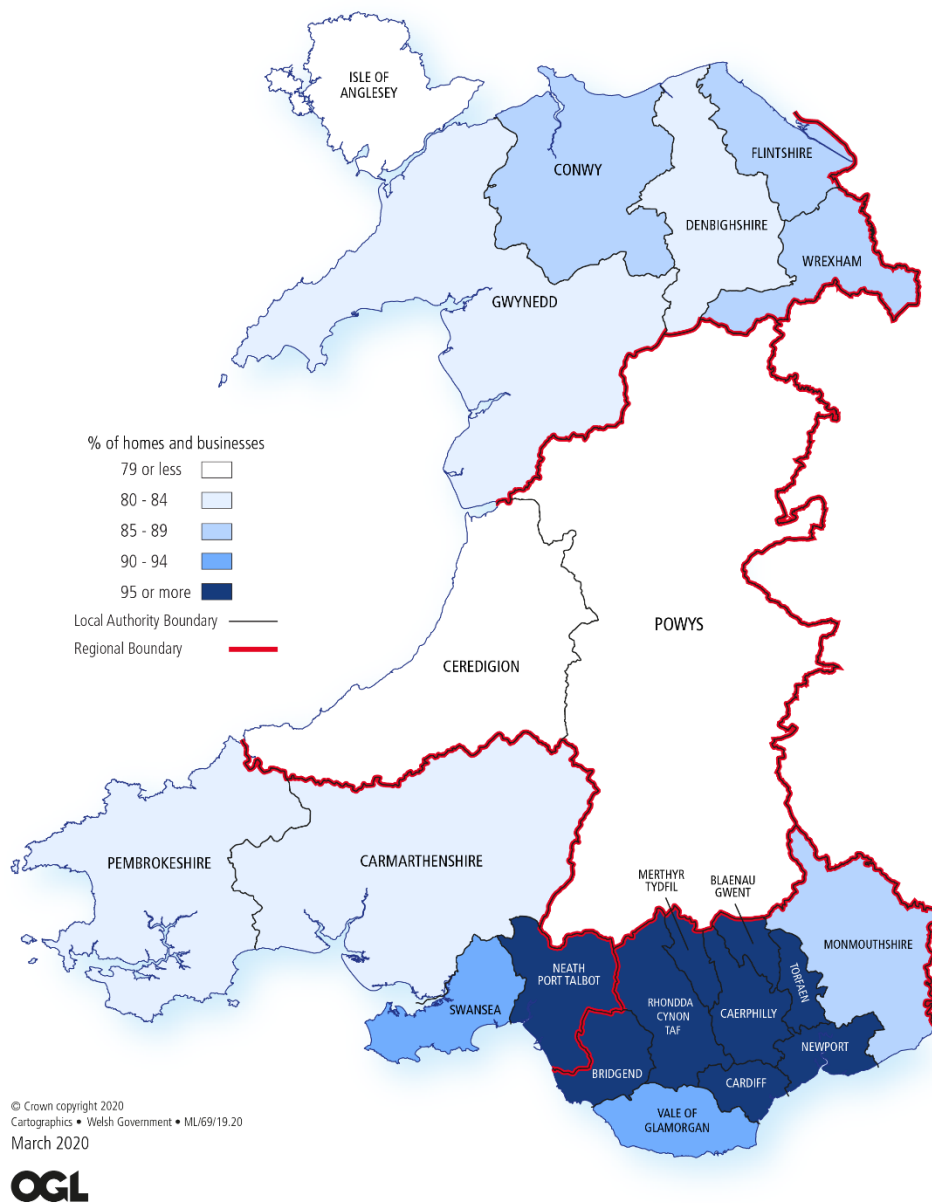


Source: Connected Nations Report, the Office of Communications

Mobile coverage is improving in Wales, but coverage from all four network operators remains lower than the UK figure.

Ofcom data shows that 72 per cent of indoor premises (homes and businesses) in Wales had 4G coverage from all four operators in September 2019, compared to 69 per cent in September 2018. The UK level was 80 per cent. 5 per cent of Wales' geographic area was not covered by any operator, this was higher than the UK rate of 2 per cent.

**Figure 31: Percentage of homes and businesses in Wales with indoor voice call coverage from all four network providers, by local authority, September 2019**



Source: Connected Nations Report, the Office of Communications

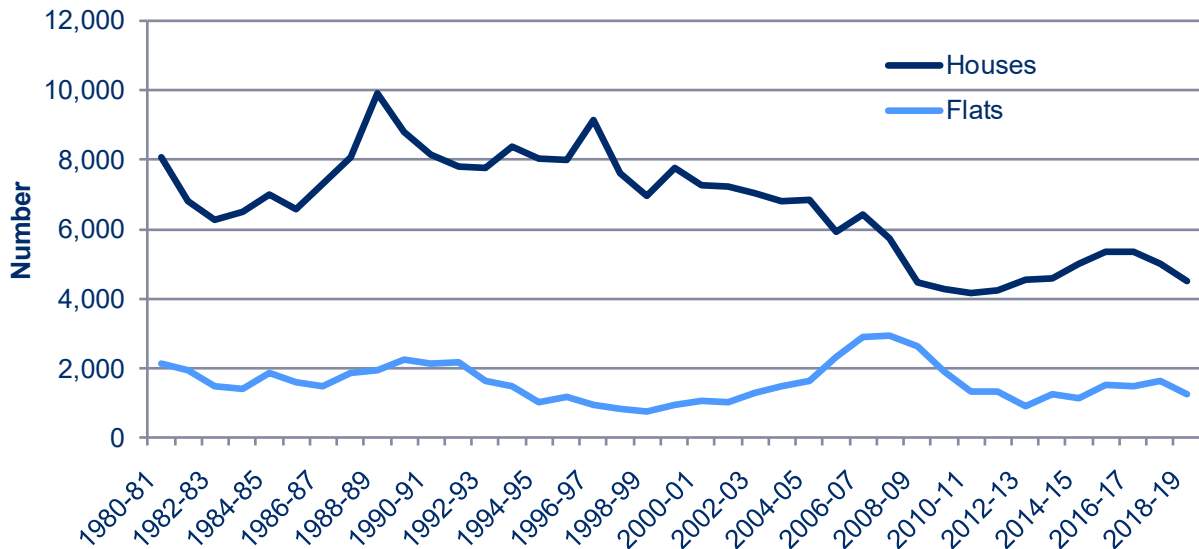
Data on telephone call services shows that 90 per cent of indoor premises in Wales were covered by all four operators in September 2019. This was up 2 percentage points relative to September 2018, but remained 3 percentage points lower than the UK rate. 2 per cent of Wales' geographic area was not covered by any operator in September 2019, this was higher than the UK rate of 1 per cent.

## 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 has increased by 5 per cent to an estimated 1.43 million dwellings at 31 March 2019.

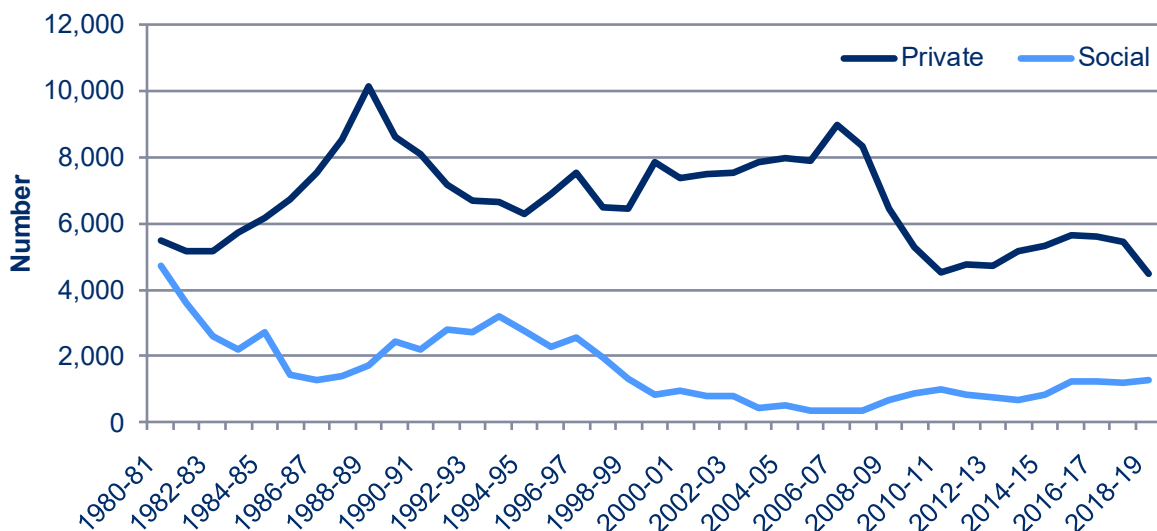
Private rental is becoming more common in Wales, with 15 per cent of all dwellings in Wales privately rented in 2019. Owner occupied dwellings continue to represent the majority of all dwellings in Wales, accounting for 70 per cent of dwellings in 2019.

**Figure 32: Number of new flats and houses in Wales completed over time**



Source: New house building data collection, Welsh Government

**Figure 33: Number of new dwellings completed in Wales over time, by tenure**

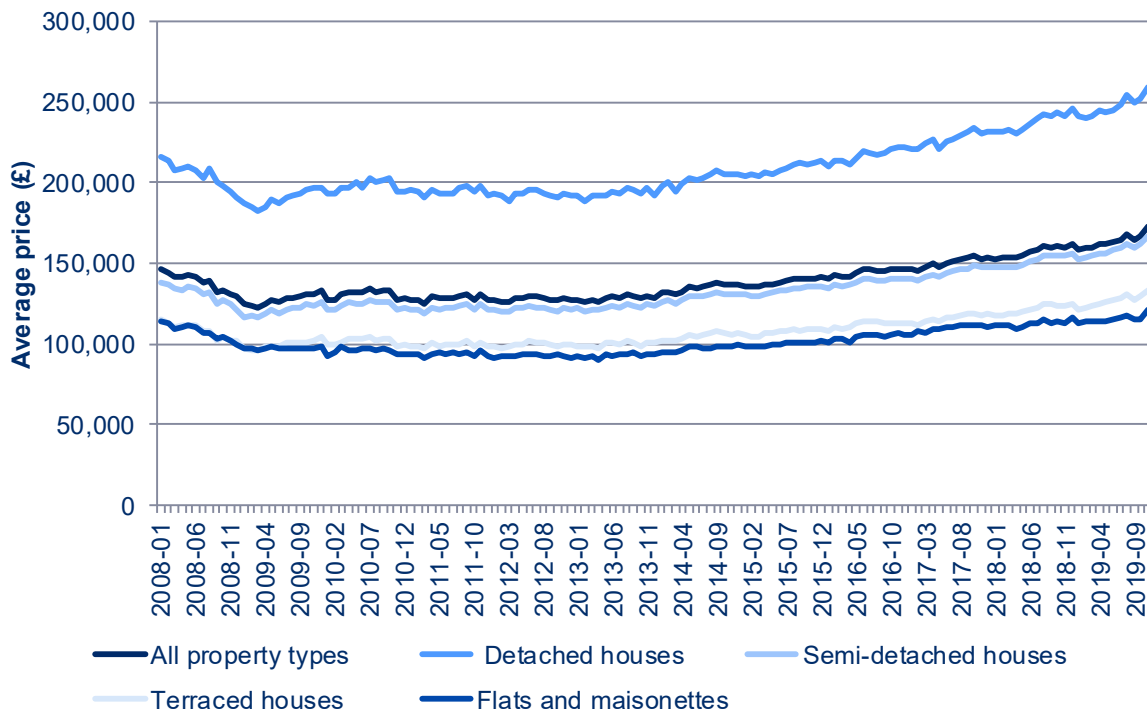


Source: New house building data collection, Welsh Government

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.

Across Wales, 5,777 [new dwellings](#) were completed over the 2018-2019 period. This is 19 per cent fewer than 10 years previously and 25 per cent fewer than 20 years previously. For the 2018-19 period, 55 per cent of new dwellings were completed in South East Wales. Cardiff was the local authority with the highest number of new dwellings completed in Wales (730, or 13 per cent) and Merthyr Tydfil was the lowest (36, or 1 per cent).

**Figure 34: Average dwelling prices in Wales over time by dwelling type**



Source: UK House Price Index, HM Land Registry

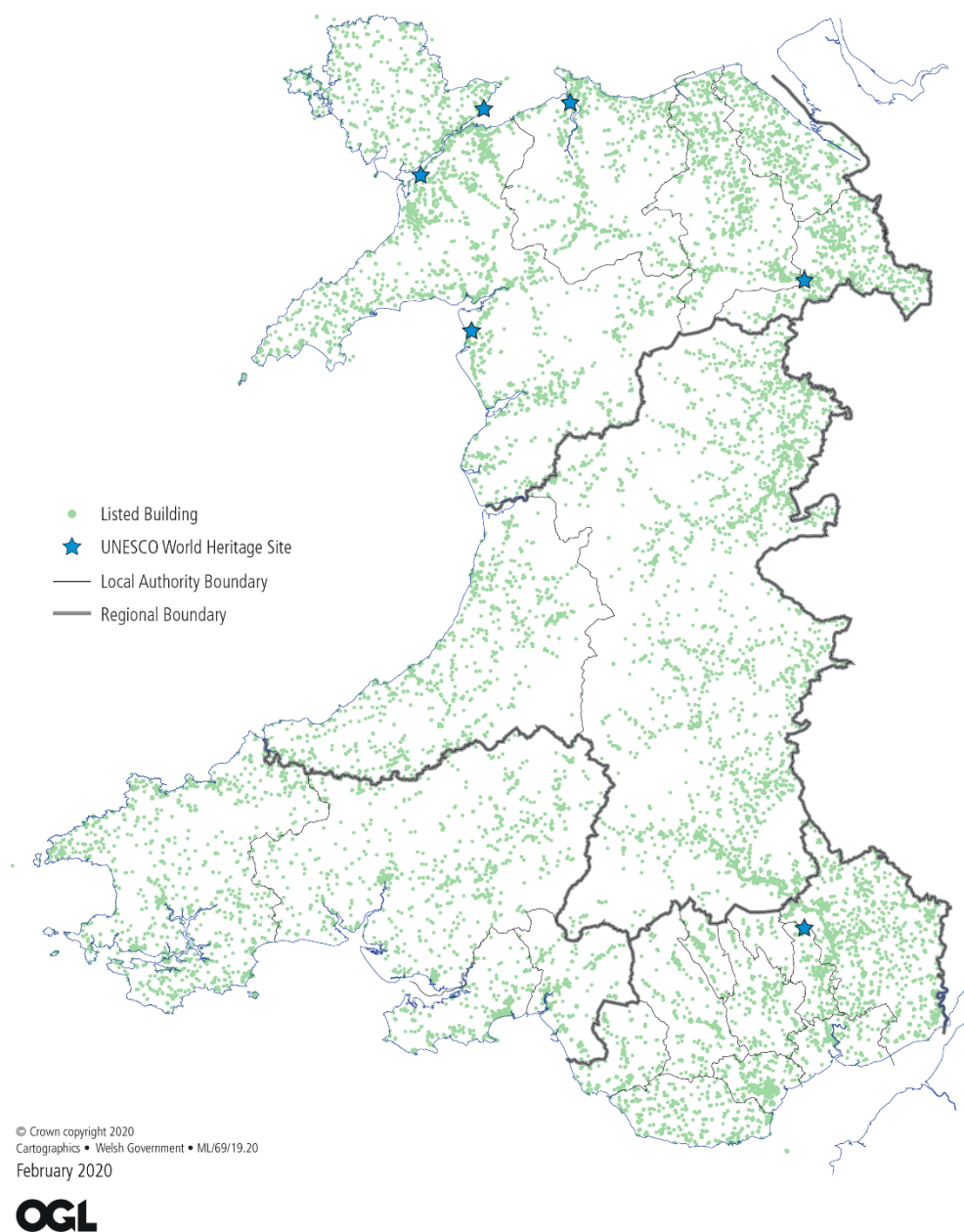
As of the December 2018 publication of the [UK House Price Index \(UK HPI\)](#). The UK HPI is a mix adjusted index, which mean it is weighted to reflect the actual mix of properties sold in the previous year. The UK HPI is published monthly. All figures in the UK HPI are liable to revisions for up to 12 months.

Data from the January 2020 UK House Price Index shows that in September 2019 the average house price in Wales was £165,100, an increase of almost £35,900, or 27.8 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 (£274,300) and Blaenau Gwent (£94,600) respectively.

[Local authorities estimated](#) that 405 persons were sleeping rough across Wales in the 2 weeks between 14th and 27th October 2019. This is an increase of 17 per cent (58 persons) compared with the exercise carried out in October 2018. Over half (54 per cent) of these were located in South East Wales, and nearly a quarter (23 per cent) were located in Cardiff.

## Culture & Heritage

Figure 35: World Heritage Sites & Listed Buildings in Wales



Source: Cadw

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, based in North Wales, while Blaenavon industrial landscape is situated in South East Wales.

In the nine months from [January to September 2019](#), there were 8.5 million overnight trips to Wales by GB residents, an increase on the year before of 4.8 per cent. During this period the expenditure in Wales was £1.7 billion.

[2018 data](#) shows that 10.0 million overnight visits were made in Wales, amounting to 35.6 million nights in total. This was just under 10 per cent of the total number of nights spend in Great Britain.

The expenditure on these trips was £1.9 billion, 7.7 per cent of the GB total. These Wales figures represent an increase compared to 2016 and 2017, but remain below 2015 levels.

During the first nine months of 2019 there were 820,000 trips taken in Wales by international visitors with an expenditure of £358 million. This was an increase in the volume of trips by international visitors to Wales compared to the same period in 2018. International visitor expenditure also increased compared to 2018.

In 2018, there were 1.7 billion [Tourism Day Visits](#) (TDVs) in Great Britain, of which 96 million (6 per cent) were in Wales. Within Wales, fewer TDVs were reported in 2018 than 2017. The total expenditure from TDVs in Wales in 2018 was £4.0 billion, 6 per cent of the GB total. There was a decrease in the volume of TDVs taken in Wales during the first nine months of 2019 with 65.4 million visits and an expenditure of £2.6 billion.

In 2018, TDVs in Wales were more likely than those taken in England to involve visits to friends or family for leisure, outdoor leisure activities, general days out to explore an area, a special public event or a special event of a personal nature. They were also much more likely to include a visit to the seaside/coast than visits to other UK nations, and far less likely to include a trip to a city or large town.

In 2018, 27 per cent of Tourism Day Visits to Wales were made by people from outside Wales.

The [2018 Wales Tourism Accommodation Occupancy Survey](#) shows that the average hotel bed and room occupancy rates for 2018 were 50 per cent and 66 per cent respectively, a slight decrease of 1 percentage point on both bed and room occupancy rates against the previous year. 2018 occupancy rates are broadly on par with the recent five-year trend.

The seasonality of occupancy rates for hotels in Wales continued to be evident in 2018, though January and December 2018 reported strong occupancy growth compared to 2017. The average room occupancy rate rose from 52 per cent in January to a peak of 77 per cent in August before falling to 59 per cent in December.

Note: 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 links to individual releases.

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. The majority of the data was known to be the most recently available as at 30/01/2020. Current data is accessible through the links to sources included in the commentary. Housing need estimates have not been included as the publication of this data which was also scheduled for 20 May has been postponed. On 18 May 2020, ONS stated that they have identified some processing errors affecting the 2018-based national population projections. This mainly affects the flows between England and Wales. The impact of this is major and the data will be revised. Therefore, population and household projections have not been included in these reports.

Although we don't plan to regularly update these reports, they've been updated now to support the continuing development of the National Development Framework following consultation on the draft NDF in autumn 2019. The Mid and South West Wales region has been split into separate regions for Mid Wales and South West Wales to provide more detailed analysis on the key issues and trends in these areas. 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.

## **Timeliness and punctuality**

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. The majority of the data was known to be the most recently available as at 30/01/2020. Housing need estimates have not been included as the publication of this data which was also scheduled for 20 May has been postponed. On 18 May 2020, ONS stated that they have identified some processing errors affecting the 2018-based national population projections. This mainly affects the flows between England and Wales. The impact of this is major and the data will be revised. Therefore, population and household projections have not been included in these reports.

## **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 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. The 46 national indicators were laid in March 2016 and this release includes 7 of the national indicators, namely the percentage of adults who have fewer than two healthy lifestyle indicators; levels of nitrogen dioxide (NO<sub>2</sub>) pollution in the air; the percentage of adults with qualifications at the different levels of the National Qualifications Framework; Gross Disposable Household Income per head; the capacity (in MW) of renewable energy equipment installed; the percentage of people in employment; and the percentage of people who can speak Welsh.



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](#).

As a national indicator under the Act they must be referred to in the analyses of local well-being produced by public services boards when they are analysing the state of economic, social, environmental and cultural well-being in their areas.

Further information on the [Well-being of Future Generations \(Wales\) Act 2015](#).

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-regions-wales-2020>

### **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](mailto:stats.info.desk@gov.wales).

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