The Cardiff Business Partnership (CBP) consists of leading employers in the Capital of Wales. Its mission is to represent businesses in the Capital, ensuring that the views of enterprise are at the heart of the development of Cardiff as a competitive global location. The Partnership aims to identify key issues facing the Capital’s economy. Through its members, the Partnership has the unique ability to go beyond advocacy to action.

The Partnership also serves as a resource of expertise and creative thinking for policy makers, media and others concerned with taking forward the Cardiff and Welsh economy. The Partnership seeks to influence policy by presenting the views of leading businesses, sponsoring research, and bringing together experts and leaders in city development.

CBP and Cardiff Council have entered a collaborative arrangement with Cardiff Business School, which will spearhead leading research aimed at helping to improve the competitiveness of Cardiff.

Cardiff Business School is one of the leading business and management schools in the UK. In the most recent UK Government Research Assessment Exercise, it was ranked 4th in the UK for the quality of its research. 70% of the School’s research is considered to be internationally excellent or world leading. Its academics work with leading blue-chip, global businesses such as Tesco, Nestle, Hewlett Packard and Johnson & Johnson, and with international public sector and not-for-profit organisations such as the United Nations, International Labour Organisation and Department for Communities and Local Government. The School educates 2,600 students each year, delivering a broad portfolio of undergraduate, postgraduate and postgraduate research degrees.

ITS MEMBERS INCLUDE:

- ADMIRAL
- BOOMERANG
- FRESHWATER
- GRANT THORNTON
- HUGH JAMES SOLICITORS
- LEGAL & GENERAL
- MEDIA WALES
- PRICEWATERHOUSECOOPERS
- PRINCIPALITY BUILDING SOCIETY
- S A BRAIN & CO.
- TATA
- TESCO

www.cardiffbusinesspartnership.com
The city of Cardiff has a diverse economic base and is a major regional employer, drawing 70,000 people from outside the city to work each day. This survey examined the views of employees within the service sector: the sector employs 167,800 people and is of considerable importance to the Welsh economy. It is therefore constructive to explore the structure of the industry in terms of its employees and attempt to glean insight into their thoughts on work and the city.

This report presents the findings from a research project conducted by Cardiff Business School and Cardiff Business Partnership. The project examined employees’ perceptions of Cardiff as a place to work and asked them what they wanted from the city in the future. Over 640 individuals responded to the survey of which the majority were employees from the Cardiff Business Partnership firms.
INTRODUCTION

As the capital of Wales, Cardiff is seen as the economic powerhouse of the nation. The population of the greater Cardiff area, including the Vale of Glamorgan, grew at around 0.5% pa over the period 2002-09 and is projected to continue to grow at this rate until 2013. Cardiff’s growth has outpaced the rest of Wales and is expected to continue to do so for the next decade. One of the biggest group of respondents came from the financial services sector: in 2011, Cardiff has approximately 30,000 people employed in financial services and thousands more in business services. The businesses of Cardiff have seen a continual demand for labour which has outstripped local supply for many years. This has led to the growth of the Cardiff city region: over 70,000 people commute from the Valleys and further across South Wales to work in Cardiff each day.

This report summarises some key findings from a major survey of employees working in Cardiff. The research and analysis has been conducted by Cardiff Business School in conjunction with Cardiff Business Partnership. The survey is the first to look at how people feel about Cardiff as a place to work.

The primary finding from the research is that people report very positively on their employment and Cardiff as a city. The vast majority of respondents (95%) wanted to continue to work in Cardiff for at least the immediate future and over two-thirds (68%) indicated that they believed their longer-term futures were in Cardiff.

In the following pages we explore these findings in detail. In particular, we will look at what it is that people like about Cardiff and what they want to see the city invest in over the coming years. We also focus on the commuting patterns of respondents and how commuting workers from different parts of south east Wales had different opinions on the city’s future direction and priorities.
The survey examined whether people wanted to continue working in Cardiff, based on their experiences to date. There was an overwhelmingly positive response to this question. 95% of respondents wanted to continue working in Cardiff for at least the immediate future, with 68% saying they wanted to continue for the foreseeable future. The 5% who said that they did not want to keep working in Cardiff were asked their reasons for wanting to leave: personal reasons and better standard of living were the major responses given.
The positive response continues when we consider respondent views on where they would like to be working and for whom in 15 years’ time. Close to half of the respondents would like to be working for their current employer in Cardiff, but in a more senior position, in 15 years’ time. This suggests considerable satisfaction on the part of many employees with both their employer and city of employment.

Respondents commonly reported that they ‘enjoy working with colleagues’ and had an ‘enjoyable working environment’. A number of other features were mentioned, including stimulating work and flexible working arrangements.

Another positive factor for a significant minority was working close to home.

**GETTING TO WORK**

- **Car / Motorcycle**: 51%
- **Train**: 22%
- **Bus**: 16%
- **Cycle**: 8%
- **Walk**: 22%

When examining commuting it seems that car/motorbike is the primary means for getting to work, with over 51% of respondents reporting this type of transport use.

Many of those who took part in the survey (62%) chose more than one method of commuting, with train and walking being the most common combination. More detail on commuting patterns will be presented later in this report.
There was a wide distribution of earnings among the respondents. Although 27% fell into the £15,000 to £20,000 bracket, over 41% of those surveyed earn in excess of £25,000.

The survey was distributed to around 5,000 employees of the member firms of Cardiff Business Partnership. 648 completed questionnaires were returned (response rate of 12.96%). There is a broad split amongst sex and age with a slight skew towards women and respondents aged 24-39. 42% of the sample are under 30 years of age: given that Cardiff has a young population, the sample is thought to be representative.
It is important to understand why people choose Cardiff as a place to work, as this helps to explain what it is about the city that is attractive. One reason for working in Cardiff is that people were born here or have lived here since childhood (32% of respondents) or that they were initially brought to the area by a job (24%).

To explore this further, more detail was requested from respondents: one of the key findings is that people come originally because family or friends are in Cardiff. Many respondents reported that they were not originally from Cardiff but came here when they met their partner (11%).

The positive impact of Cardiff’s higher education institutions is also clear from the data, with more than a tenth of people reporting that they chose to stay on after graduation (13%). People also allude to facilities and the size of the city itself: “The main reason was for a better work/life balance and to be near friends and family.”
WHAT PEOPLE DON’T LIKE

- Better Employment Elsewhere: 32%
- Personal Reasons: 48%
- Cost and Availability of Housing: 6%
- Better Cultural Offer Elsewhere: 21%
- Problems in Commuting: 21%
- Better Leisure Offer Elsewhere: 9%
- Better Standard of Housing Elsewhere: 36%
- Dangerous: 36%
- Parking / Congestion: 48%
- Expensive £££££££: 21%
- City Living: 32%
- Transport: 36%

Reasons you don’t want to keep working in Cardiff.
While the picture painted in the survey is broadly positive, it is important to reflect on the negatives. Although only 5% of those surveyed said they did not want to continue working in Cardiff, it was important to explore the reasons behind their desire to leave. By far the most important motivation for wanting to leave was personal reasons, followed by the perceived better standard of living elsewhere.

More generally, to give a more rounded picture of Cardiff, we also asked all those surveyed what concerns they had about working in the city. The largest area of concern for respondents was congestion, with over half the people (54%) in the survey highlighting this. This appears to refer specifically to the problem of getting in and out of the city to work since only 9% of respondents said that getting around the city outside work was a problem. The other most significant concern was the lack of cleanliness (29%).

When the more detailed, qualitative comments provided by individual respondents were explored, concerns about transport were raised again. Almost 80% of comments were about the problems with transport and infrastructure. Along with congestion, the other major area of concern is parking, with numerous respondents expressing annoyance with the limited parking available and cost of parking in the city centre. A number of respondents thought that buses and trains did not provide effective alternatives to driving, with a typical comment being: "There is no train connections leaving at a suitable time that will get me into work for 9".
The development of Cardiff’s infrastructure must be at the heart of long term economic strategy. Examining the views expressed by those that work and live, and/or commute into the city, means that important development priorities can be identified.

Those surveyed expressed clear views about the issues that need the city’s attention. Public services are cited by over 50% and this is closely followed by transport in general, both in the city and its hinterland. Along with the physical infrastructure, nearly one third of respondents wanted to see investment in parks and green spaces.
Approximately 70,000 people commute into Cardiff to work each day. We undertook a spatial analysis of respondents using data provided on post-codes. Of those surveyed, 57% were from the greater Cardiff area. The remaining respondents come from as far afield as 60 miles away, indicating an extensive travel to work area.
Residential location is a key factor in explaining the methods of transport used to commute. Although car/motorcycle dominated the modes of transport overall, walking or bus was a strong preference for those from Central Cardiff (CF24, CF14, CF11, CF10). Contrary to this, CF23 in central Cardiff saw larger numbers driving to work. Train was the preferred travel option for commuters from the Valleys.

In terms of earnings there are significant differences between respondents according to residential area. Respondents from Central Cardiff reported lower than average earnings with both CF11 and CF14 having around 5% of those surveyed earning less than £10,000 per annum. The only other area surveyed which had a higher percentage of low earners was CF48 (Merthyr Tydfil) with 20%. At the other end of the scale CF62 and CF63 have the highest percentage of respondents earning over £40,000. Over 40% of respondents from Barry (CF63) earned over £40,000.

When looking at what attracted people to Cardiff, there is little difference between areas with the exception of two: the first is CF63, where the standard of living was the most attractive factor in coming to Cardiff, while people living in CF3 indicated that the local environment was the most attractive factor.

Clear geographical patterns also emerge when exploring the factors that concern people about the city. Those from city areas such as CF11 and CF14 have concerns with cleanliness and crime. Almost all areas have some degree of concern with congestion, but it appears that those living right in the city centre (CF23, CF24) feel this the most. This is an interesting finding as it is in these areas where most people walk to work. The other interesting detail is that, out of all areas, the farthest postcode in this selection, CF48 (Merthyr Tydfil), appears to have the least concern with congestion.
AGE OF RESPONDENTS AND RESPONSES

What Does the City Need to Concentrate On?
What Attracted You to Come and Work in Cardiff?
What Do You Dislike the Most About Cardiff?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Most Important</th>
<th>Most Attractive</th>
<th>Dislike the Most</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>Better Environment and Cleaner City</td>
<td>City Nightlife, Pubs, Bars &amp; Restaurants</td>
<td>Lack of Employment Opportunities</td>
</tr>
<tr>
<td>25-39</td>
<td>Making the City Safer</td>
<td>City Nightlife, Pubs, Bars &amp; Restaurants</td>
<td>Congestion</td>
</tr>
<tr>
<td>40-54</td>
<td>Better Digital Communication</td>
<td>Standard of Living</td>
<td>Congestion</td>
</tr>
<tr>
<td>55-64</td>
<td>Making it Easier to Get to Work</td>
<td>Local Environment (Parks, Green Spaces)</td>
<td>Lack of Cleanliness</td>
</tr>
<tr>
<td>65+</td>
<td>Better Environment and Cleaner City</td>
<td>Local Environment (Parks, Green Spaces)</td>
<td>Congestion</td>
</tr>
</tbody>
</table>

Looking at the issues that respondents have with Cardiff broken down by age shows some similar patterns to those that have been presented previously. Congestion is seen as the biggest issue within most age bands. However 18-24 year olds see the lack of employment as being the biggest problem. Only one age group (55-64 year olds) highlighted cleanliness as a major issue. A better environment and a cleaner city was chosen by two age groups. Surprisingly, although to this point congestion and transport have been raised by only one age group as the most important, 55-64 year olds choose making it easier to get to work as the city’s priority.

When examining what attracted people to come and work in Cardiff there appears to be a significant age division. 18 to 39 year olds were attracted by City nightlife, pubs, bars & restaurants whereas 55 to 65+ were attracted by the local environment (Parks, green spaces).
CONCLUSION

This report has examined the findings of the Cardiff Business Partnership Employee Survey. It reveals positive perceptions of the city, with an encouragingly large number of people reporting that they want to continue to work in Cardiff. There is also a strong positive message for employers, with large numbers of employees reporting that their career aspirations are to progress with their current employer.

When examining the evidence in detail interesting patterns emerge. Many of those who responded said it was the job itself that attracted them to Cardiff, not the city. Having said that, many report satisfaction with the city and this is reflected in their future plans.

Although those surveyed report a broadly positive view of working in Cardiff, they do indicate that there are certain issues related to working in the city. Investment in city infrastructure to improve commuting times was raised as important by many of the respondents. Distance does not seem to be the key determinant in the reporting of congestion problems, with the inner city respondents having greater issues with transport than those commuting longer distances. It is important to note one or two areas that have been highlighted as key to the development of the city:

THE ENVIRONMENT: this was particularly important to young respondents who feel that making Cardiff a cleaner and safer city should be a priority.

INFRASTRUCTURE: transport in general is mentioned throughout the report both in the responses to questions and the comments of those surveyed. Of the 470 who responded to the question about the vision for Cardiff in 2020, 80% highlighted transport of some kind as being the area that needs to be developed further.

This report also reveals the extensive travel to work area of Cardiff. People travel from as far as Bristol and Pembrokeshire to work in Cardiff. Cardiff City Council reports that 70,000 people commute to work in Cardiff each day. Cardiff is far more than an employment source for city dwellers but provides jobs for the south east Wales region. The city remains the fastest growing part of the Welsh economy supporting incomes over a very wide area.
ACKNOWLEDGEMENTS

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