



CARDIFF

OUR COMPETITIVE CAPITAL



A CAPITAL CITY ON A HUMAN SCALE



“

Some capital cities have lost their way.

They grow, but do they progress?

And how do they measure success?

Above all, capital cities should meet the needs of their people.

So, we measure success in human terms.

You will feel part of our capital.

A capital where you belong.

A capital you can get around quickly and safely.

A capital that gives you more time to enjoy with friends.

A capital more green than grey.

A capital with more sky than skyscrapers.

A capital that doesn't cost the earth.

Businesses will feel at home.

Visitors will quickly get to know the city,

and Cardiffians will want to get to know you.

Cardiff is a capital to enjoy, to succeed

in and to feel human in.

”



CARDIFF WELCOMES YOU

“

One of the most
competitive
cities in the UK

”

“

A world-class environment for business

”

Cardiff is a city transformed, and we are a city that is primed for investment.

On a number of measures we are the fastest growing city in the UK.

With well over half of the population aged under 35, Cardiff is a young and vibrant city whose population is predicted to grow by over 20% over the next two decades.

We have one of the most skilled workforces in the country, and we regularly top the quality of life league tables.

On top of this we have over 20 million annual visitors attracted to a city that has hosted some of the biggest events in the world, including Champions League Final, when the city put on a mesmerizing show for a global audience of over 1 billion.

Our capital city is home to world-class universities, cultural institutions and creative start-ups; major companies, entrepreneurs and innovators who are up there with the best in the world.

The city's recent development has seen internationally competitive clusters emerge in the financial, creative, life sciences and advanced manufacturing sectors, with some of the UK's leading businesses in these sectors calling Cardiff home.

And as a capital city, business also has the Welsh Government on their doorstep, as well as a host of national organisations and HQs to support their activities.

Cardiff is also benefitting from continued investment in our infrastructure. The regeneration of Central Square and surrounding area that has the potential to support up to 30,000 jobs, whilst the £1bn investment in a new South Wales Metro will see more frequent, more reliable and faster trains accessing nearly 100 stations across a network that has Cardiff as its core. This critical infrastructure has put Cardiff at the forefront of UK cities as an investment location.

In short, Cardiff is a great place to work, a great place to visit and a great place to invest.

Our success has been built on the Team Cardiff approach, where the public and private sector come together to support the city's development. We have a reputation for delivering big projects on time, and on budget, and we will continue to work in partnership to deliver our aspirations for our city's economy.



**Cllr Huw Thomas,
Leader,
Cardiff Council**

WE'RE WELL CONNECTED

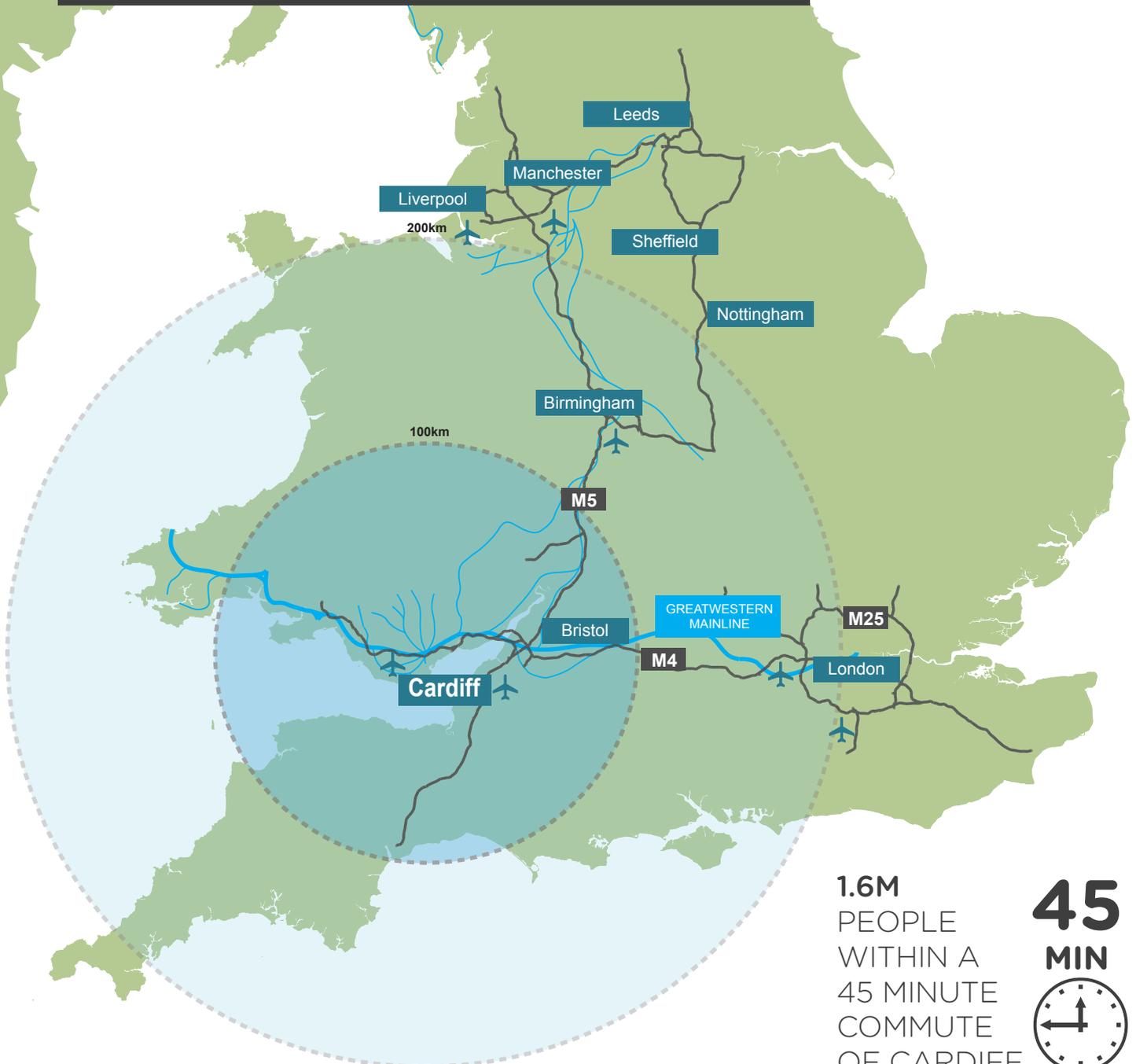
“

An excellent
location for
business

”

“ Closest Capital City to London ”

Less than two hours from London, with excellent transport and digital infrastructure, Cardiff is one of Europe's best connected and most competitive destinations.



1.6M
PEOPLE
WITHIN A
45 MINUTE
COMMUTE
OF CARDIFF



“ Over 50 direct flights and more than 900 connections from Cardiff Airport ”

CARDIFF IS ONE OF THE MOST CONNECTED UK CITIES

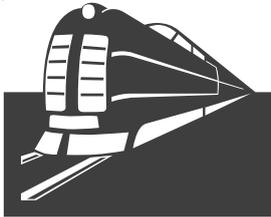


98.43% OF HOMES AND BUSINESSES HAVE ACCESS TO SUPERFAST BROADBAND

SOURCE: THINK BROADBAND

CARDIFF TO LONDON IN **105 MINUTES** POST-ELECTRIFICATION

SOURCE: GWR



4 INTERNATIONAL AIRPORTS WITHIN 140 MINUTES DRIVETIME



THE PORT OF CARDIFF CONTRIBUTES **£121 MILLION** TO THE LOCAL ECONOMY EACH YEAR

SOURCE: ASSOCIATED BRITISH PORTS



Road

Cardiff is located on the M4 motorway, linking the city to London, southern England and other cities in South Wales. Typically Heathrow Airport is easily reached in around two hours. The M50 / M5 motorways link Cardiff to the Midlands and the North of England with Birmingham just two hours away.

Rail

Cardiff has excellent train connections to the rest of the UK. Cardiff Central Station has direct twice-hourly services to central London with journey times of 1hr 45 minutes post-electrification in 2019.

Cardiff has one of the largest urban rail networks in the UK outside London, with 89 rail stations linking the city to its Capital Region. The network is currently being upgraded with £1.bn of investment to electrify rail infrastructure across South Wales bringing the Capital Region even closer. More than half of the total population of Wales will be able to commute by rail to Cardiff city centre in less than an hour.

The city also has a Eurofreight terminal and is the main rail freight depot in Wales for European and world markets.

	By Road (theaa.com)	By Rail (thetrainline.com)
Central London	144 miles 2hrs 26 mins	1hr 45 post electrification 48 trains per day
Birmingham	112 miles 2hrs	2hrs 72 trains per day
Bristol	41 miles 55 mins	48 mins 72 trains per day
Manchester	183 miles 3hrs 26mins	3hrs 10mins 48 trains per day

Air

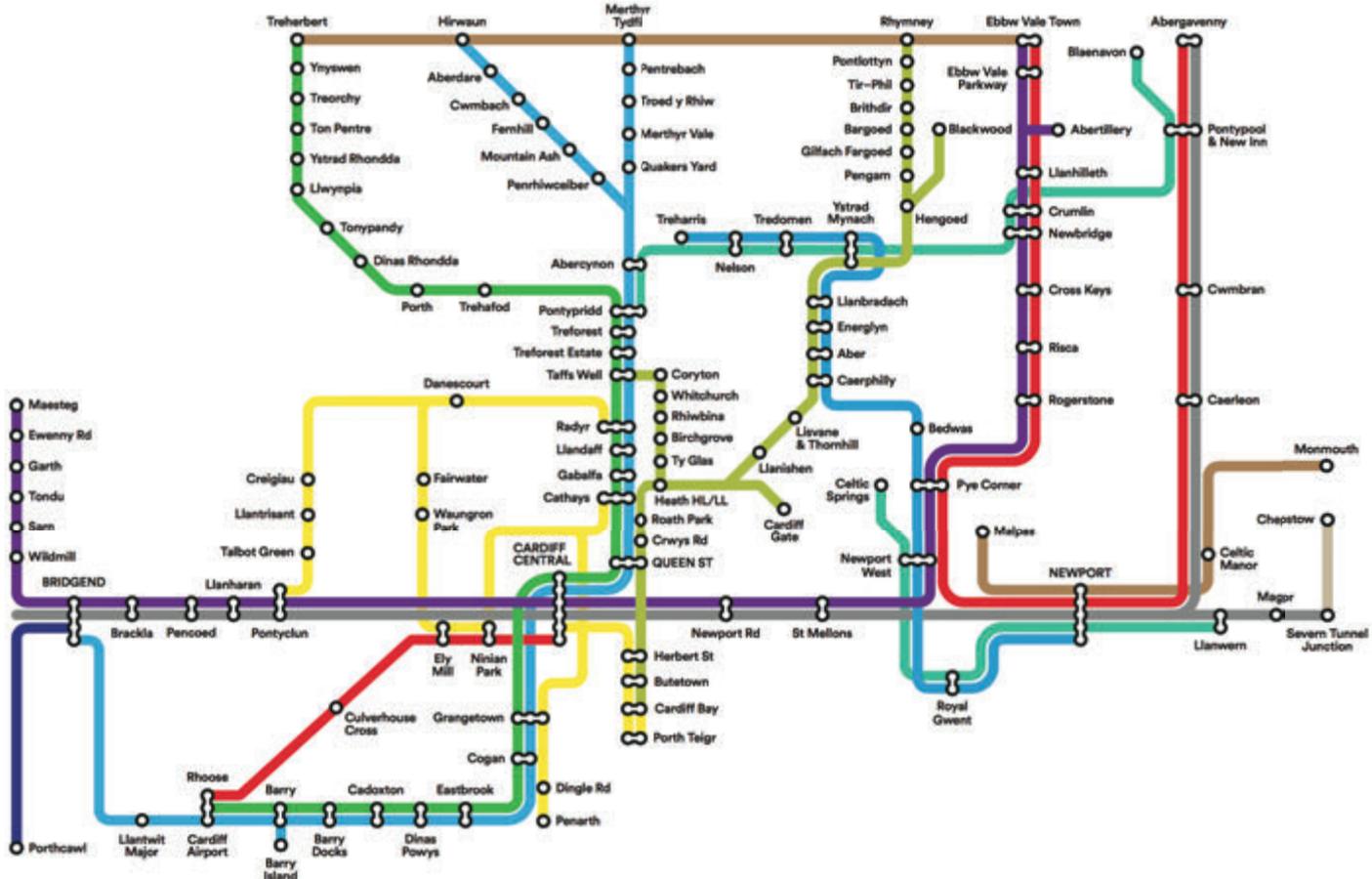
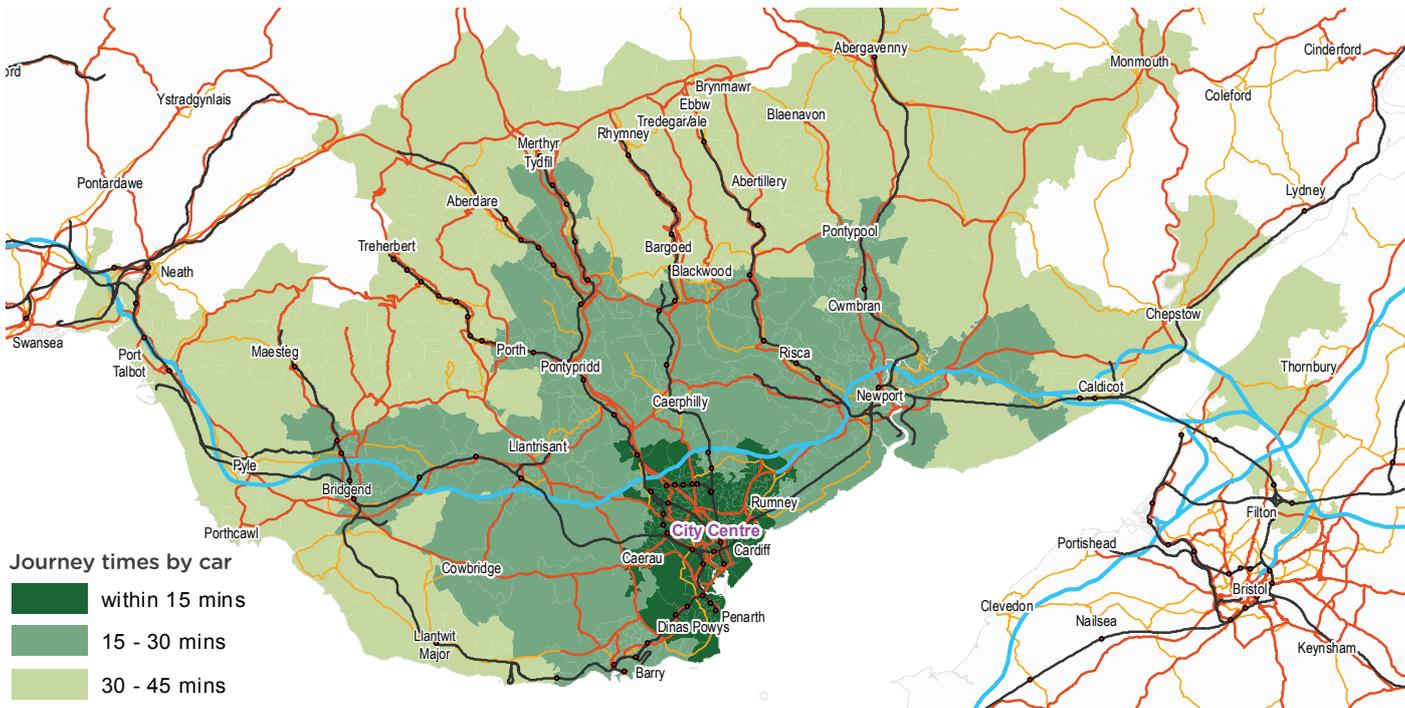
Cardiff Airport, just 12 miles from the city centre, has over 50 direct flights to cities across the UK, Europe and to Doha, with more than 900 connections to destinations across the globe through regular scheduled flights via Schiphol.

Within a 140 minute drive time are Bristol, Birmingham and Heathrow Airports, all within easy reach.



Port of Cardiff

The Port of Cardiff has expertise in the handling of containers, steel, forest products, and bulk cargoes. With good connections to the rail network, and within easy reach of the M4 motorway, the port handles around 1.7 million tonnes annually, supplying customers with specialist storage solutions and dedicated handling equipment.



“ £1 billion investment underway to improve the Metro network ”

OUR CAPITAL DIFFERENCE

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One of the fastest growing cities in the UK, with faster job growth than any of the Core Cities

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CARDIFF IS RANKED TOP UK CORE CITY FOR INVESTOR APPEAL

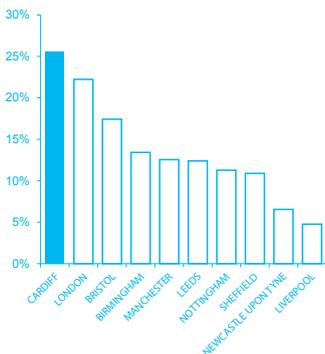
SOURCE: COLLIERS INTERNATIONAL SEARCH FOR VALUE & REGIONAL RELATIVITY. WINTER 2017



We're one of the UK's strongest performing cities



20 YEAR PROJECTED POPULATION GROWTH 2014 - 2034



SOURCE: WELSH GOVERNMENT

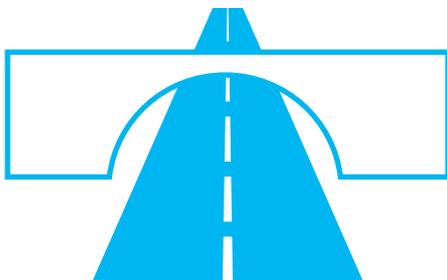
As a capital city, Cardiff is the commercial, cultural and retail centre for Wales and the focal point for business activity.

Projected to be the fastest growing of the ten UK Core Cities over the next two decades, the city's growth is supported by its graduate workforce, accessibility, leading universities and competitive cost for salaries and property.

Companies investing in Cardiff benefit from the wider Capital Region with its population of 1.5 million which is projected to grow by more than 20% over the next 20 years.

Cardiff is a diverse, talented and youthful city, with over 70,000 students across the city's three universities. 57% of our workforce is qualified to degree level (NVQ 4+) making us one of Britain's smartest cities.

£3.5 BILLION INVESTMENT IN CAPITAL REGION



Our city is home to world-class sporting and cultural institutions and has a growing reputation as a first class destination for leisure, culture, retail and business, hosting the 2017 UEFA Champions League Final, Rugby World Cup, FA Cup Finals, IAAF World Marathon, Volvo Ocean Race, Ashes test matches and a NATO Summit.

Befitting a capital city, Cardiff is filled with all the facilities, institutions and opportunities that you would expect.

As the home of the Welsh Government, investors in the city are able to benefit from unprecedented access to national and city government leaders and a 'Team Cardiff' approach, meaning quick decisions can be made to support investment and development.

To top it all, Cardiff is a capital city that offers a lifestyle which allows its residents to enjoy life to the full. Whatever you are looking for, we think you'll find it in our beautiful city!

20+



MILLION

VISITORS ANNUALLY TO CARDIFF SPENDING £1 BILLION

SOURCE: DELOITTE 2017

BEST QUALITY OF LIFE OF ANY UK CORE CITY

SOURCE: EUROPEAN COMMISSION QUALITY OF LIFE IN EUROPEAN CITIES 2015

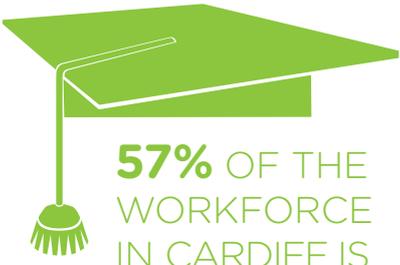


CARDIFF'S GOT TALENT!

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A workforce with exceptionally high education levels and low labour costs

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57% OF THE WORKFORCE IN CARDIFF IS QUALIFIED TO DEGREE LEVEL (NVQ4+) SOURCE: NOMIS 2018

“70,000 students studying in Cardiff”

To compete well in today’s global economy a business needs a highly skilled, adaptable and dependable workforce. In our city you will find a youthful workforce with diverse skills, talent, motivation and loyalty.

With 69% of the population of Cardiff of working age, and access to almost one million people of working age within the city’s Capital Region, our workforce scores highly on a number of key indicators – education levels are exceptionally high, labour costs are significantly lower than many other UK core cities and our workforce is distinctly younger than the UK average with a much higher percentage of workers between the age of 20-34.

52% OF THE WORKFORCE ARE EMPLOYED IN PROFESSIONAL, TECHNICAL OR MANAGERIAL OCCUPATIONS



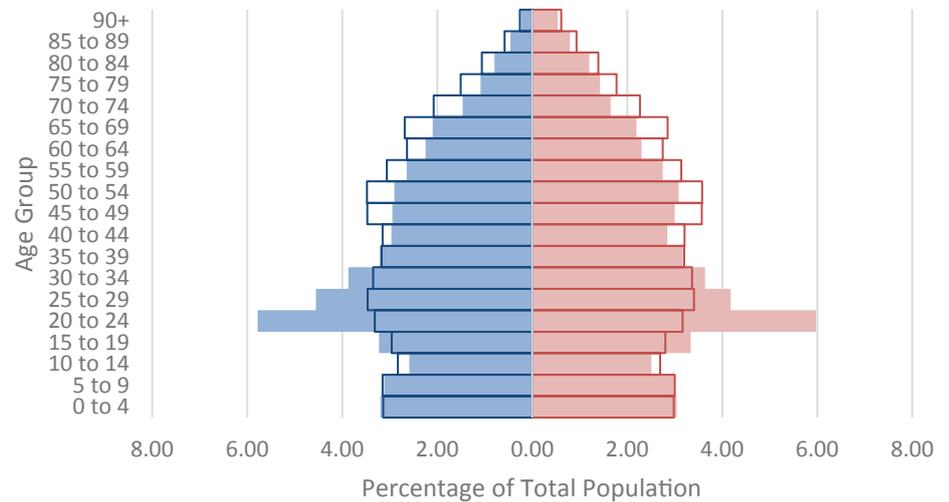
SOURCE: NOMIS ANNUAL POPULATION SURVEY 2017

RANKED HIGHEST UK CORE CITY IN THE GLOBAL TALENT COMPETITIVENESS INDEX 2018



SOURCE: INSEAD

Cardiff Population Pyramid 2016



■ Males (UK) ■ Females (UK) ■ Males (Cardiff) ■ Females (Cardiff)

Source: ONS Revised mid-year population estimates 2016

69% OF THE POPULATION OF CARDIFF ARE OF WORKING AGE



SOURCE: NOMIS

Cardiff benefits from one of the greatest proportions of graduates in the workforce of any UK city with 57% of the workforce having a qualification at NVQ4+ or above, and more than a third of the city’s graduates choose to stay and work in Wales in the long term.

Job satisfaction is also high with Cardiff ranked in the top 10 of happiest employees in the UK with staff who are very or completely fulfilled in their jobs (LinkedIn Work Satisfaction Survey 2016). In comparison with South East England, Cardiff workers benefit from greater purchasing power with a lower cost of living, lower house prices and rents.

35% OF GRADUATES ARE STILL IN WALES 10 YEARS AFTER GRADUATION



SOURCE: CARDIFF UNIVERSITY

For more than 200 years Cardiff has welcomed workers from across the globe. Today the city is home to over a hundred different nationalities, with a broad range of language skills. Cardiff is also a popular destination for international students, with over a quarter of the city’s students hailing from outside the UK, and companies based in the Capital Region have a good experience of recruiting workers with a range of language skills. The 2011 census shows that in addition to English and Welsh, residents of Cardiff consider a number of other languages to be their main language:

- French, Spanish, Polish and other European languages: 8,700
- Arabic and other Asian languages: 16,000

(Source: NOMIS Labour Market Profile 2017)

OUR CITY WORKS HARD

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Multi-talented, multi-lingual,
young, enthusiastic and
future-focused

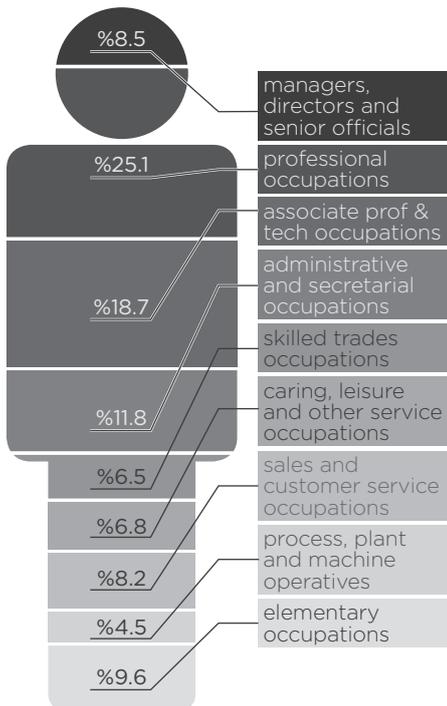
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“ Deep talent pool ”

IN 2016 CARDIFF ENJOYED A **HIGHER RATE OF GROWTH** IN GVA PER HEAD THAN THE REST OF THE UK - 5.7% COMPARED TO 3.7%

SOURCE: ONS DEC 2017

MAJOR OCCUPATION SECTORS



SOURCE: ONS ANNUAL POPULATION SURVEY 2018

MORE THAN **32,000** ENTERPRISES BASED IN CARDIFF

SOURCE: WELSH GOVERNMENT 2018



Cardiff's diverse economy is among the most competitive of the UK Core Cities. The heavy industry of the past has given way to flourishing service and knowledge-driven sectors and the city has developed a well-earned reputation for having a deep talent pool strongly supported by the city's three universities.

Today, around 211,000 people are employed in Cardiff and over 630,000 in the wider Capital Region. The key sectors in the city with both significant clusters of activity and capacity for growth include:

- Financial and Business Services
- Creative and Digital Industries
- Life Sciences
- Advanced Manufacturing

Our economy is demonstrating strong performance across a number of headline indicators, with jobs growth up, unemployment down, visitor numbers up and growth in the number of new companies created.

In 2016, Cardiff accounted for 17% of the total gross value added (GVA) for Wales, with its GVA growing at a faster rate (5.7%) than both Wales and the UK over the year (see below). In terms of GVA per head, Cardiff (£27,480) was a mid-table performer in comparison with the other UK core cities, although its rate of growth over the year was again the highest.

UK Core Cities Gross Value Added (Balanced) (£million), 2016

Area	2016	Annual % Change
CARDIFF	£9,933	5.7
Manchester	£18,172	5.4
Bristol, City of	£14,313	4.7
Nottingham	£8,911	4.4
Birmingham	£25,720	4.3
United Kingdom	£1,747,647	3.7
Glasgow City	£20,371	3.5
Leeds	£21,951	2.2
Newcastle upon Tyne	£7,802	2.1
Sheffield	£11,433	1.4
Liverpool	£11,334	0.6

Source: ONS (2016 figures are provisional)

Invest in Cardiff is also addressing the future skills needs of the local economy through a ground-breaking collaboration between employers, learning providers and young people called 'The Cardiff Commitment'.

Employment by Sector 2016

	Cardiff	Capital Region
Primary industries and utilities	5,000	13,000
Manufacturing	9,000	71,000
Construction	8,000	33,000
Wholesale and retail	29,000	96,000
Transport & storage (inc postal)	5,000	18,000
Accommodation & food services	17,000	47,000
Finance, business and communication	60,000	126,000
Public administration, education and health	67,000	203,000
Arts, entertainment, recreation & other services	11,000	25,000

Source: NOMIS Business Register and Employment Survey 2016

FINANCIAL AND PROFESSIONAL SERVICES

“

Over 1 in 4
of the city's
workforce are
employed in
the sector

”

WHO'S HERE?

Active Quote

Admiral

Atradius

Blake Morgan

Conduit Global

Creditsafe

Delio

Deloitte

Equiniti

Eversheds Sutherland

Firstsource

Gambit

Geldards

Grant Thornton

Handelsbanken

Hugh James

Julian Hodge Bank

KPMG

Legal & General

Lloyds Banking Group

Metro Bank

Motonovo Finance

Monzo

Principality

PwC

SSE

Target Group

Thomas Carroll

Wealthify

Zurich

- Financial and insurance activities, real estate and business services now account for £3.5 billion of output
- Across Wales more than 153,000 people work in the financial and professional services sector, and this number is set to grow to 200,000 by 2021
- Cardiff has the best penetration of superfast broadband of UK Core Cities, boosted by an Internet Exchange in the heart of the city

53,000
EMPLOYED IN
FINANCIAL AND
PROFESSIONAL
SERVICES



SOURCE: WELSH GOVT 2014

FINANCIAL AND
PROFESSIONAL
SERVICES
ACCOUNT FOR
£3.5 BILLION
OF OUTPUT



SOURCE: ONS 2016

NO. 1 UK
CORE CITY AS
AN **OFFICE**
LOCATION

SOURCE: PROPERTY WEEK HOT 100
UK OFFICE 2018

£ **11.7%** OF TOTAL
GVA COMES FROM
FINANCE AND
INSURANCE

SOURCE: ONS 2016

With headquarters of a number of leading financial and fintech services in the city, Cardiff has emerged as a key location for finance businesses.

In comparison with the UK's other Core Cities, a broad range of businesses within the financial services sector are represented in Cardiff. Welsh government research states that Cardiff is the preferred location for contact and shared service centres in the UK and the city has a growing reputation in outsourced HR, legal and other corporate services. The flourishing financial sector has an increasing number of insurance and pension companies making Cardiff their home. Employment in insurance is significantly above the UK average, with the proportion of people employed in life insurance seven times greater than the UK average.

Ranked in the world's top 100 for Business and Economics, Cardiff Business School has a close relationship with businesses in the city, including its collaboration with Legal & General, which has led to Cardiff developing the largest cluster of medical underwriters in the UK. The Business School has also collaborated with OSTC to develop a Cardiff Trading Room.

A number of globally recognised financial services companies, some of the UK's biggest accountancy firms as well as home-grown companies have expanded their operation in Cardiff over recent years. Amongst these is Admiral which launched in Cardiff in 1993 with 57 staff and no customers. Now it has a turnover of more than £1 billion, employs 10,000 people in eight countries and has over 6 million customers worldwide. Admiral's growth was supported by higher education in the city that not only provides a steady stream of skilled graduates, but also works closely with business to design and shape future courses for the sector.

Cardiff also has a growing reputation as an alternative FinTech capital to London, recognised as an exemplar for financial aggregator site technology. The sector is supported by the Welsh Financial Services Graduate Programme, a collaborative two year full-time programme of work, training and academic study unique to Wales designed to develop an elite talent pool. The programme is backed by leading financial services employers including Admiral, Atradius, Hodge Bank, Development Bank of Wales, Principality Building Society, Legal & General and Motonovo.

Other initiatives set up to support the FinTech sector include the National Cyber Security Academy, an innovative project to develop the next generation of cyber security experts established by the University of South Wales and Welsh Government, and Cardiff University's National Software Academy which aims to address the national shortage of skilled programming and software engineering graduates in partnership with Welsh Government and industry leaders.

“

Cardiff is one of the UK's largest financial and professional services sectors outside of London

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CREATIVE AND DIGITAL INDUSTRIES

“

Central Square in the city centre is the new destination for the creative sector

”

WHO'S HERE?

Avanti Media

Bad Wolf

Bait Studio

Bang Post Production

BBC Cymru Wales

Boom Cymru TV

Box UK

Cardiff Theatrical Services

Celf Creative

Cloth Cat Animation

Coup Media

Curve Media

Ffilm Cymru Wales

Fiction Factory

Gorilla

ITV

Milk VFX

Orchard Media

Pinewood Studio Wales

Plimsoll Productions

Rant Media

Rondo Media

S4C

Sequence

Tidy Productions

Vox Pictures

Wildflame Productions UK

- Cardiff is one of the UK's fastest growing creative sectors outside of London
- Around a third of all Welsh creative industry jobs are based in Cardiff
- 3000 creative businesses in Cardiff
- Home to triple Emmy Award production Sherlock as well as leading BBC prime time production Doctor Who and Casualty
- 98.43% penetration of superfast broadband boosted by an Internet Exchange in the heart of the city
- The creative industry sector is the fastest growing sector in Wales with employment increasing 58% between 2005 and 2018
- Renowned universities with 7,000 creative industries graduates each year in subjects including animation, visual effects, digital and mobile technology development, fashion and fine art
- Contributes over £1bn of GVA to the city's economy each year
- High-end TV, film and animation projects can qualify for UK tax credits, worth up to 20% of their spend in the UK. A number of cross-sector finance and support services provided by Welsh Government are also available.

Cardiff's fast-growing creative sector is young, savvy and connected. The city is nurturing a creative community that is embracing new technologies and digital innovation, making it one of the largest and most successful creative sectors outside London. We are pioneers in co-locating creative and technical skills which has led to Cardiff becoming the hub of Wales' creative industries sector with particular strengths in broadcasting, TV and film production. A significant concentration of creative companies are attracted to Cardiff due to the presence of major broadcasters such as the BBC, ITV, S4C, supported by the city's academic excellence.

We are one of the UK's leading centres for screen production, as well as being the UK's first Music City. Pinewood Studios Wales are based in Cardiff, adding to the city's established studios including the BBC Drama Village. Located in Cardiff Bay, the 170,000 sqft facility, including nine studios equivalent in length to three football pitches is the purpose-built home of flagship BBC dramas Sherlock, Casualty and Doctor Who.

Companies such as Bad Wolf, founded to create ambitious and imaginative drama for the UK, USA and global TV markets, epitomise our production base. Bad Wolf have secured a pipeline of TV productions including an adaptation of Philip Pullman's fantasy trilogy His Dark Materials, filmed at their new 250,000 sq ft Wolf Studios Wales facility.

BBC Wales has invested in a new Foster & Partners designed regional headquarters at Central Square. The statement building is the centrepiece of a new destination for the creative sector in the heart of the city centre. Cardiff University's new School of Journalism has already moved into new accommodation immediately next to the new BBC HQ.

As well as being a prime location for major players in the creative sector, Cardiff is also home to a growing creative start-up community that has been increasing in size and confidence. The city benefits from a rapidly growing network of artist studios, creative hubs and co-working spaces, from the newly developed Gloworks in the heart of Cardiff Bay, Tramshed Tech, Rabble Studio and Indycube as well as space in the city's established Cardiff Business Technology Centre.

With a high level of digital connectivity and infrastructure, the city's creative base is bold, innovative, and experimental making Cardiff one of the most dynamic creative cities in Britain.

MORE THAN

15,000

PEOPLE
EMPLOYED
IN CREATIVE
INDUSTRIES IN
CARDIFF

SOURCE: NOMIS BRES 2017



“

The success of the Cardiff creative cluster is about connectivity, both hard and soft

”

Source: Bazalgette Independent review of the Creative Industries 2017



CREATIVE
INDUSTRY IN
CARDIFF BENEFIT
FROM ALMOST
500,000 SQ FT
OF INCUBATION
SPACE

LIFE SCIENCES

“

One of the most competitive clusters in the UK

”



WHO'S HERE?

Alesi Surgical

Authentic World

BBI Solutions

Biocatalysts

Biological Preparation

CatSci

Cellesce

Creo Medical

Diurnal

EKF Diagnostics

Flexicare

GE Healthcare

Genesis Biosciences

Gyrus Medical

Huntleigh Healthcare

Indoor Biotechnologies

Jellagen Pty

MedaPhor

Medidata

Midatech Pharma

Momentum Bioscience

Ortho Clinical
Diagnostics

Oxford Pharmagenesis

Pelican Healthcare

Pharmaron UK

Synexus

TrakCel

Verona Pharma

- The Cardiff Capital Region is home to one of the world's top five world diagnostic companies Ortho Clinical Diagnostics, the £4 million Welsh Wound Innovation Centre, ReNeuron, the first company to carry out clinical trials of stem cells in stroke patients and leading European specialist pharmaceutical company Norgine.
- Cardiff University is the base for Sir Martin Evans, Nobel Prize Winner for discovery of embryonic stem cells, and has an MRC Centre for Neuropsychiatric Genetics and Brain Imaging Research Centre (CUBRIC)

With AI and cognitive technologies accelerating ever forwards, the fast-moving Life Sciences sector in the Cardiff Capital Region is diverse, research-driven and categorised by global enterprises including Norgine, Biomet, GE Healthcare and Convatec.

Life and health sciences employ 17,000 people in Cardiff working in areas such as eHealth, pharmaceutical services, regenerative medicine and medical technology. A greater proportion of people are employed in Cardiff in the manufacture of irradiation, electromedical and electrotherapeutic equipment, medical and dental instruments, supplies and pharmaceutical preparations than the UK average.

The sector is well supported by the region's universities which are home to world leading research expertise with a strong commercial outlook. Research expertise in the Life Sciences across Wales is brought together by the Life Sciences Research Network led by Cardiff University. The Network has supported a broad range of therapeutic activities in collaboration with more than 300 research partners from industry, charities, the NHS and other international universities.

As well as facilities such as the Cardiff Medicentre (a medical technology incubator on the site of University Hospital Wales), there has also been a significant investment in Life Sciences Hub Wales, based in Cardiff Bay, which is a nerve centre for academic and healthcare organisations, business, expert advisers, clinical and funding organisations. The Hub seeks to stimulate interaction, innovation, networking and collaboration, making the link between ideas and commercialisation a reality and providing a commercially driven resource for the sector.

The life sciences sector in Cardiff also benefits from the advice, support and business opportunities offered to members of MediWales. The network promotes collaboration within the life science and health technology community and facilitates access to global trade opportunities, and to clinical expertise. Through its LifeScience Academy, MediWales connects companies with students and graduates who have the skillset they require and runs training courses to enhance key skills within the sector.

Financial support from the unique Wales Life Sciences Investment Fund may be available to qualifying companies.

17,000
EMPLOYED IN
LIFE SCIENCES

SOURCE: NOMIS BRES 2016



£100
MILLION
RESEARCH
CONTRACTS
WON BY
CARDIFF
UNIVERSITY

“

Cardiff's three universities supply talented scientists and provide access to academic expertise

”

ADVANCED MANUFACTURING

“

A broad and
forward-looking
sector

”

WHO'S HERE?

Airbus

AerFin

Aston Martin

BCB International

British Airways

Celsa

Doncasters

Dow Corning

Elmatic

GE Aviation

General Dynamics

Harris Pye

Harlech Industrial
Doors

HDM Tubes

IQE

Newport Wafer Fab

Panasonic

Pavecost Manufacturing

Philtronics

Renishaw

RSR Diagnostics

Royal Mint

Sony UK Technology
Centre

SPTS Technologies

Tema Engineering

Ultrawave

UTS Group

Zeon Chemicals

- Wales' Advanced Materials and Manufacturing productivity is 20% higher than the UK average (Source: ONS)
- Dedicated aerospace Enterprise Zone at St. Athan and Cardiff Airport
- 40 hectare manufacturing Enterprise Zone in the Capital Region at Ebbw Vale
- World-renowned reputation for aircraft MRO (Maintenance, Repair and Overhaul), with over 20% of the UK's market
- Manufacturing in the Cardiff Capital Region accounts for £5.3 billion of output (Source: ONS 2016)



70,000 EMPLOYED
IN MANUFACTURING
IN CARDIFF CAPITAL
REGION

SOURCE: ONS BUSINESS REGISTER
AND EMPLOYMENT SURVEY 2016

Cardiff has a thriving advanced manufacturing sector, supported by links to higher education and a skilled workforce in manufacturing techniques. Specialisms range from electronics, to state of the art steel production at Europe's most efficient Electric Arc Furnace at Celsa Steel UK. Around 9,000 people are employed in advanced manufacturing in Cardiff, with many more employed in supporting sectors (Source: NOMIS BRES 2016).

The sector is also supported by the city's universities, which have close links with business and the commercialisation of research. The Centre for Advanced Manufacturing Systems at Cardiff (CAMSAC) is one example, a research centre set up to build directly on Cardiff's existing strong reputation for internationally leading manufacturing related research. CAMSAC bridges both engineering and business disciplines and works closely with businesses to develop new manufacturing concepts, drawing on funding from the Welsh Government, the EPSRC, the Technology Strategy Board, the European Union and industry.

Across Cardiff Capital Region there is also a wide range of expertise in sectors including aerospace and defence, with businesses such as GE Aviation, British Airways, Airbus Defence & Security, BAE Systems, and General Dynamics having a presence in South East Wales. Other sectors with a significant presence include the automotive sector, where there is a particular focus on low carbon research, with business and academia working together, such as Cardiff University's Institute of Energy collaboration with Ricardo and Qinetiq on alternative fuels and technologies.

The city is also home to advanced technology manufacturers such as IQE, who manufacture and supply bespoke compound semiconductor wafers to the major chip manufacturing companies. IQE is unique in being able to supply wafers using all of the leading crystal growth technology platforms. Building on the strength of IQE, a state-of-the-art facility has been established in the Cardiff Capital Region to support the development of the Compound Semiconductor industry cluster in the area.

In comparison with the UK's Core Cities, Cardiff has a broad range of businesses within advanced manufacturing. A greater proportion of people are employed in Cardiff Capital Region in a range of manufacturing sectors than the UK average, from electronic appliances to construction materials.

BUSINESS READY
INFRASTRUCTURE



AT CARDIFF
AIRPORT &
ST ATHAN
ENTERPRISE
ZONE

1200

UNDERGRADUATES
ENROLLED ON
ENGINEERING
COURSES AT
CARDIFF UNIVERSITY



“

Expertise in aerospace,
semi-conductor wafers
and the automotive
sectors

”

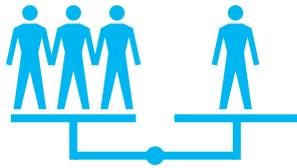
WE'RE VERY COMPETITIVE

“

Skilled and talented workforce with competitive graduate salaries

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HIGHLY COMPETITIVE STAFF COSTS



INVESTMENT MARKET 2017

STRONGEST YEAR ON RECORD WITH INVESTMENT VOLUMES REACHING

£474.5m

SOURCE: ALDER KING MARKET MONITOR 2018



Annual Office Cost per person

CARDIFF	£5,205
Bristol	£5,800
Thames Valley	£5,885
Leeds	£5,905
Edinburgh	£6,365
Birmingham	£6,625
Manchester	£6,870
London	£14,540

SOURCE: TECH NATION 2018

Cost of Living of UK Cities against London

City	Total	Housing
Manchester	-35%	-43%
CARDIFF	-41%	-46%
Sheffield	-42%	-43%
Leeds	-36%	-42%
Glasgow	-36%	-46%
Bristol	-23%	-11%
Birmingham	-32%	-34%

SOURCE: EXPATISAN COST OF LIVING 2018

Graduate salaries by City

London	£32,500
Newcastle	£32,500
Glasgow	£28,000
Edinburgh	£27,000
Bristol	£26,703
Manchester	£25,000
Birmingham	£25,000
Leeds	£25,000
CARDIFF	£25,000
Nottingham	£23,000

SOURCE: TOTAL JOBS 2018

Starting or locating a business in Cardiff can give clear cost advantages with low operating costs in comparison with other major UK cities. Add to this the security of a large and skilled workforce and Cardiff becomes an extremely attractive proposition.

Property

The last decade has seen the city centre transformed with a steady supply of high quality office and retail development. Significant new developments include 3 & 4 Capital Quarter with the new BBC HQ at the heart of the prestigious Central Square development.

Commercial property costs in Cardiff are highly competitive and around 40% of that in London. City centre grade A rents are among the lowest of the Core Cities at £25 psf.

PRIME INDUSTRIAL RENTS (PSF)

DEC 2017 (CUSHMAN AND WAKEFIELD)



CITY CENTRE GRADE A RENTS (PSF)

DEC 2017 (CUSHMAN AND WAKEFIELD)



Cardiff also has an ample supply of cost-effective co-working and incubator units, ideal for those working within the creative or technology sectors. These include Cardiff Business Technology Centre, Tramshed tech, Tec Marina, Eagle Lab, Indycube and Welsh Ice.

Salaries

Staff salaries in Cardiff are highly competitive.

Average salaries are amongst the lowest when compared to other major cities across the UK with the average (median) full-time weekly wage being £21.60 below the UK average (Source: Welsh Government). Graduate salaries are also extremely competitive, with a steady supply of skilled and talented workers supporting businesses across the city.

Financial Assistance

Cardiff is well placed to attract a wide range of grant aid and financial assistance with a range of incentives and support available for businesses looking to start up or locate in the city.

Investment projects can potentially attract capital investment / job creation incentives.

While we know that grant aid and financial support are not key reasons for a company choosing a vibrant location like Cardiff, the availability of grant can help reduce the risks of an investment and potentially improve returns.

Alongside competitive salaries the availability of a grant package can provide a very competitive offer for businesses looking for a long term sustainable location.



WE'RE A CITY OF UNIVERSITIES

“

Cardiff universities are recognised
for their world leading research

”

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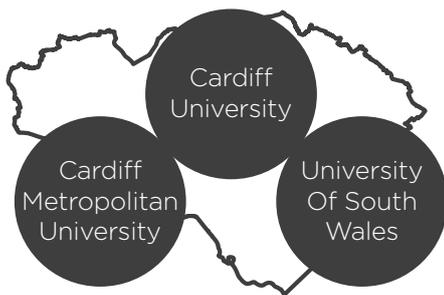
Three business schools and three law schools established in the city

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75,000 STUDENTS IN THE WIDER CAPITAL REGION



THREE UNIVERSITIES BASED IN CARDIFF



Cardiff is home to around 70,000 students studying at three universities: Cardiff University, Cardiff Metropolitan University and the University of South Wales which between them offer three business schools and three law schools. The city's universities attract talent from around the world, with 1 in 4 students being international students.

Cardiff University

Cardiff University is a member of the Russell Group of leading research universities and has a strong reputation for the quality of its teaching and research. 31,500 students, including more than 4,000 from over 100 countries outside the UK, help to create a vibrant, cosmopolitan community.

The university is ranked top 5 UK University for research quality and impact in the most recent Research Excellence Framework (REF 2014) with 87% of research assessed as world-leading or internationally excellent. The School of Engineering is ranked no.1 in the UK for research impact (REF 2014) and has developed strong links with industry.

Cardiff Business School is one of only 11 in the UK to be both accredited by the Association to Advance Collegiate Schools of Business (AACSB) and be a member of the Russell Group. It is the world's first Public Value Business School, committed to delivering social and economic improvement.

Cardiff Metropolitan University is a growing university with business and management as a key strength. Its career-orientated courses make graduates popular with employers.

Cardiff Metropolitan's specialisms are focused around its five schools, namely Cardiff School of Management, Cardiff School of Art & Design, Cardiff School of Education, Cardiff School of Health Sciences, and Cardiff School of Sport. In addition, the National Centre for Product Design and Development Research (PDR) provides expertise in design and innovation, offering support to manufacturing businesses.

In the recent Research Excellence Framework results, Cardiff Metropolitan University was ranked as the highest post-1992 'modern' university, with 80% of the University's overall quality profile rated as world-leading or internationally excellent.

The University of South Wales is one of the largest universities in the UK with 17,000 undergraduates and is renowned for its partnership with major employers in the region.

The university has established a Centre for Financial and Professional Services in Cardiff, working with the Welsh Government to meet the city's demand for skills in the growing financial and professional services sector.

With specialisms in the creative industries, sustainable energy, and mobile communications, many lecturers at the University of South Wales are producing research which is contributing to advances within their field of expertise. The latest Research Excellence Framework results rated half of the university's research as either world-leading or internationally excellent.

“

Cardiff universities produce more Financial & Professional Services graduates per capita than any other major city in the UK

”

WE ♥ CARDIFF

“

A city with a quality
of life you'll enjoy

”





Cardiff Capital Region has it all – vibrant city life, stunning coastline and awesome mountains



Quality of life is one of the big competitive advantages of Cardiff. It is consistently recognised as one of the best cities to live in by residents, and in the 2016 EU Quality of Life in European Cities survey Cardiff was voted the number 1 UK Core City for quality of life.

The survey also ranked Cardiff as:

- Top UK city for cultural facilities
- Top UK city in terms of quality of public space and top 10 in Europe, with more green space per person than any other UK core city
- Top UK city for retail, and 5th best in Europe
- 2nd best UK city for sports facilities

A superbly located city of attractions, sport, culture and entertainment.

However you like to spend your leisure time you will find what you're looking for in Cardiff and its Capital Region.

Sports fans are very well served. Home to the Principality Stadium (Europe's largest indoor arena with a retractable roof and a capacity of 75,000) Cardiff is also the place where major sporting events take place such as the UEFA 2017 Champions League Final, international rugby, Ashes cricket and world heavyweight title fights.

If outdoor pursuits are your passion, South Wales offers the whole range of activities from first class golf courses to wakeboarding, climbing, power kiting and coasteering, all in some of the most beautiful heritage coastline and national parkland to be found in the UK.

Lovers of the arts enjoy Cardiff's rich and varied cultural life. Cardiff Bay's Millennium Centre has established itself as a world-class venue and the city is home to national institutions with international reputations including the Welsh National Opera, the BBC National Orchestra of Wales and the National Museum Cardiff which houses one of the finest collections of Impressionist paintings in Europe as well as hosting major touring exhibitions.

Cardiff is also a city that loves to party! Festival season includes numerous events including the Cardiff Summer Festival, Cardiff Comedy Festival, the International Food and Drink Festival, Pride Cymru Big Weekend, Sŵn Festival, the Festival of Voice, the National Eisteddfod of Wales as well as the famous Hay Festival in mid Wales.

Nightlife in Cardiff is everything you would expect of a capital city with hundreds of restaurants, bars and clubs catering to every taste. The city has also become a venue that the world's leading performers want to play and has recently hosted Beyoncé, the Rolling Stones, Ed Sheeran and Coldplay.

Simply put, people love living in Cardiff – a city which makes it easy to find a great work/life balance.

MORE GREEN SPACE PER PERSON THAN ANY OTHER UK CORE CITY



97% OF CARDIFF RESIDENTS ARE SATISFIED TO LIVE IN CARDIFF

SOURCE: EUROPEAN COMMISSION QUALITY OF LIFE IN EUROPEAN CITIES 2015



Compact, multicultural Cardiff dances to its own beat, with abundant cultural and historical sights, independent businesses and a friendly atmosphere.

Source: Lonely Planet



1ST CLASS
SPORTS AND ENTERTAINMENT VENUES



WHY CARDIFF?

“

Location, skills, lifestyle,
support – Cardiff is the wise
choice for business

”



Natasha Hale

Chief Operating Officer
Bad Wolf



Independent scripted
Film and TV production
company

“ You can’t get a better group of staff! Jane Tranter, Bad Wolf’s founder, has worked all over the world, and she said it’s similar to the attitudes in New York. The staff you get in Cardiff are so enthusiastic for hard work, so willing to work that actually they’re some of the best crews in the world. There’s an enthusiasm in Cardiff to work hard, get on well and do a really good job and I think it’s that enthusiasm that we’ve found at Bad Wolf.

We have brought in a lot of people from overseas who have to come and live here while productions are filming and I think the thing that those people really love about Cardiff is the quality of life, the clean air, the fact that you can walk everywhere, the magnificent parks, and the fact that you are always quite near London and Heathrow.

”



Gareth Powell

Chief Operating Officer
BBC Wales



The world’s leading public
service broadcaster

“ The number of people working in the creative sector in Wales has doubled over the last ten years and Cardiff has been very much at the centre of that growth. Outside of London, Cardiff has seen the biggest growth in digital production and content creation, so it’s a major player. Cardiff is a national hub for creative and digital production with national broadcasters, a host of independent production companies and facilities houses, and an ever strengthening and growing freelance community. I think the future is very promising for the creative industries in Cardiff.

We’ve invested in our new HQ in Central Square and that’s been the trigger for a wider regeneration around that central part of Cardiff delivering around £1.1 billion of added economic value and 1900 jobs. To be at the heart of the creative industries in this part of Cardiff is a fantastic opportunity for us to be closer to our partners and more accessible to the public.

”



Nia Thomas

Managing Director
Boom Cymru

boomcymru

TV production company, producing innovative youth, children's, drama and factual entertainment programmes for BBC, ITV, S4C and Channel 5

“ Cardiff is an incredibly creative city. We're fast coming up behind London as a creative powerhouse and we're very excited to be in the centre of that. The presence of the three broadcasters in Cardiff made it possible for us to grow and we're excited about the possibilities of future growth.

People come here, they like it and stay. A number of people are coming from Bristol and London and settling in Cardiff. They're loving the city's vibe. Over half the population here is under 35 years old, which makes it a very young and vibrant city. We've got fantastic amenities here. The centre of Cardiff is a wonderful place to be, everything is close together and we absolutely adore being here.

”



Jamie Beer

Recruitment Manager
CELSA UK



Manufacturers of reinforcement steel and other steel long products

“ Celsa is the largest producer of reinforcement steel in the UK and one of the largest manufacturers of other steel long products. From our facilities in Cardiff we produce around 1.2 million tonnes of finished product each year from recycled steel, supplying mainly the UK and Irish markets. Cardiff's strategic location is highly beneficial to us. Located close to the Port and positioned on the M4 corridor we have excellent access to key suppliers and markets.

We also have access to a large, diverse and skilled labour pool within South Wales, with high quality graduates, particularly within finance and engineering.

One of the best things about working and living in Cardiff for me is the fact that it is a metropolitan city with great cultural events, and lots of opportunity here for families and young people alike.

”



Wayne Harvey

Senior Partner

Deloitte

Deloitte.

Global financial and professional services expertise

“ We’ve expanded rapidly in Cardiff over the last five years and now employ just over a thousand people in four different locations in the city. Cardiff was put forward, along with other cities both in the UK and overseas, as the potential location for our delivery centre. The case for Cardiff was very strong and we were very pleased with the support we received from the Council, and the Welsh Government, which helped us bring the delivery centre to the city in 2015. It’s now home to numerous support and client service teams specialising in a range of services, including multi-lingual research, international tax administration, data analytics and robotic software development.

Cardiff’s particularly good for recruitment – the workforce is diverse and there’s a large population of students. We’ve recruited people with good business language skills as we work with UK and overseas clients. This has resulted in over 50 languages being spoken across our business in Cardiff, which puts us in a unique position in our firm’s global network and has gained us a great reputation internationally.

”



Mike Cooper

Site Leader

GE Healthcare



Delivering breakthroughs in R&D and biopharmaceutical manufacturing

“ Cardiff has all the benefits being in a capital city brings but at the same time it’s not a very big city so you can get around it quickly.

We’re located adjacent to the M4 and benefit from good transport links for our materials coming in and also for our finished goods to get to a global audience.

We’ve also got close links with the universities and the schools, and great links with the government as well so if we ever need to discuss something we’re able to connect with them very quickly.

Our workforce is a fantastic asset. Many of our staff have worked for us for a long time and if we have to get a job out the door we know that we can rely on them to do it. They will always go the extra mile for us!

”



Richard Moss
Managing Director
Gorilla



Full service post-production house specialising in broadcast media and film

“ We did set up companies in London but we’ve always come back to Cardiff and this is now our main headquarters. Cardiff has a thriving media community now. I’ve got the right talent and team here, the quality of the workforce is excellent. There’s also great universities locally so new entrants are of a very high calibre.

I love living in Cardiff. I can cycle into work, I’ve got countryside on my doorstep. I can get to the beaches, get to the mountains. Cardiff has everything! You’ve got the lifestyle and the convenience and you’re not travelling all the time. It’s pretty easy to get across the city in a short amount of time and I just love it here.

”



Peter Cashin
Managing Director
Huntleigh Healthcare



Providing innovative solutions in vascular care, foetal and patient monitoring

“ We’ve been active in Cardiff for thirty years as a high-tech medical company. We’ve recently decided to increase our new product developments and the group of companies decided that Cardiff would be the area where they would want to invest. The reason for that is we have a very good local infrastructure of universities, medical facilities and general infrastructure in the city to support the business going forward.

As a life science company the quality of the workforce is paramount for us. The people that we employ in this region are of a very high calibre, both technically and intellectually, and of a very high skill level for manual tasks. We’re very pleased with the workforce in the Cardiff area.

”



Dr Andrew Mearns Spragg

Founder and Chief Scientific Officer
Jellagen



Med-Tech business manufacturing next generation collagen products

“ Jellagen was founded in Pembrokeshire in 2013 to exploit jellyfish as a next generation collagen source offering advantages in today’s search for new medical innovations in regenerative and tissue engineering medicine.

As the company grew we needed to think about employment, facilities, and manufacturing and that all meant that Cardiff was the most logical next step. Our facility here is great - the price per sq ft along with the rates are reasonably good, everything about the place was a blank canvas. We are now planning and building for success and have expanded into the unit next door.

I think there’s a fantastic opportunity for life science in Cardiff. We’ve got great universities in the region doing some brilliant science, so purely on an academic level, I think there is a huge opportunity that Wales should be very proud of.

”



Claire Edington

Head of Customer Client Operations for LGIM and Cardiff Location Director
Legal & General



Multinational Financial Services Company

“ Legal & General has a number of locations across the UK but the Cardiff location is quite unique. The enthusiasm of the staff, the skill set that we’ve got here and also the loyalty to the brand and loyalty to each other makes Cardiff an exceptional site. The quality of the workforce is excellent and I think sometimes we’re spoilt for choice.

Having three universities here on our doorstep is a huge advantage and the skills and expertise they bring is really strong. We’ve got great skills right across the spectrum for financial services in finance, customer service, and marketing - we can find all the skills we require! It’s not just about skills though, it’s also about capabilities and attitude and certainly here in Cardiff the attitude of the staff that we recruit is second to none.

”



Stuart Gall

CEO
MedaPhor



Developing intelligent
ultrasound software and
simulation platforms

“ Being located in Cardiff gives us all the advantages of access to the Heath medical school with its doctors and patients, the university and its high quality research, funding from IP Group and the Development Bank of Wales, the Medicentre, plus the large start-up support network and infrastructure that’s been so successfully established here.

The Invest in Cardiff team at Cardiff Council has been really supportive of us. In the early days when we were looking to raise money to commercialise our product and take it to market, Cardiff Council invested in our business and their funding support helped us to bring our product to market and that was a massive support for us. They’re always looking for ways they can support us, both in terms of networking and finding areas where they or the Welsh Government can help us. We couldn’t be more appreciative of the support they have given us over the years.

”



Dr Mark Waring

Site Director
Pharmaron



Providing a specialist R&D
service for the life sciences
industry

“ We’re a multi-national chemistry company providing specialist services to help drug discovery with sites in China, North America and in the UK including Cardiff.

We’ve got a fantastic workforce here. We’ve got young people graduating from local universities coming into the business who are extremely enthusiastic and we’ve had some really great successes recruiting locally, as well as from all over the UK and Europe.

We’ve been well supported by Cardiff Council who assisted us in establishing our site and making valuable contacts. We’ve also established good business networks for our particular field and that helps us enormously.

”



David Jackson

Chairman
SciTech



Design, Engineering,
Construction and Validation
Services

“ We’re a specialist engineering company that deals with the life science industries from consultancy through design and engineering. We’re based primarily in the South East of England with an office in Antwerp, but with many clients in Wales and the South West, we recently opened an office in Cardiff.

Cardiff Council’s Invest in Cardiff team were very supportive, showed us lots of buildings and facilities in Cardiff where we could potentially locate and we chose a site very close to the M4. The quality of the workforce we’ve found to date is excellent and the Cardiff region is great for leisure, shopping and work!

”



Mark Thomas

Creative Director
Celf Creative



Full service creative agency

“ Just 7hrs from the east coast of the US and 3-4hrs from Europe, Cardiff is one of the best locations from a business point of view. As a full service creative agency we collaborate with global clients, ambitious start-ups and large multi-national organisations. Specialising in creative strategy, brand identity and communication, advertising, packaging, websites and web applications, digital media and animation, for us Cardiff is ideal as the city has great transport links which are providing gateways to new business opportunities.

There’s great ambition for growth in Cardiff at the moment. Take a look at the skyline and the number of construction cranes you can see in the city, it’s evident that Cardiff is on a new growth curve.

From both a business and a personal point of view, Cardiff is a great city to be part of.

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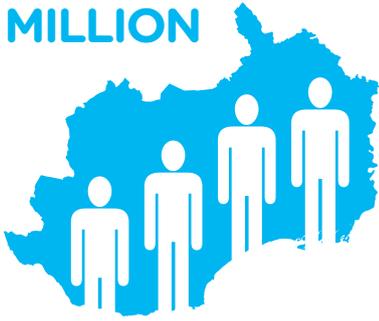
“ Put Cardiff on your shortlist. Our city has a lot to offer you! ”

LET US HELP YOU GROW

Our experienced inward investment team can assist you with your plans to do business in Cardiff by providing a single point of contact for all your queries about our city. We will ensure you are offered the very best the region has to offer.

CARDIFF CAPITAL REGION POPULATION

1.5 MILLION



BUSINESS FRIENDLY DEVOLVED GOVERNMENT



CARDIFF IS RANKED TOP UK CORE CITY FOR INVESTOR APPEAL

SOURCE: COLLIER'S INTERNATIONAL
SEARCH FOR VALUE & REGIONAL
RELATIVITY, WINTER 2017



We will work with you to make your move to the city as stress free as possible by offering you a bespoke business support package which could include:

- A dedicated inward investment account manager assigned to you throughout the process and beyond offering continued aftercare to help you first establish and then grow your business in Cardiff
- Bespoke in-depth research including cost comparisons and benchmarking against other investment propositions to support your business case
- Conducting your property search, providing introductions to our commercial property partners and advising on costs and potential locations
- Advice and assistance with identifying financial support
- Free support with recruitment and training from our expert Into Work team
- Organisation of familiarisation visits for key staff
- Introductions to local business networks, R&D centres and Universities
- Access to relevant local authority statutory services such as planning and business rates

Access to finance

As parts of Cardiff benefit from Assisted Area status discretionary financial support is potentially available for businesses, depending on location within the city and the size of business i.e. the number of staff employed.

A number of financial institutions in Cardiff, including Development Bank of Wales offer commercial finance in the form of loans from £1,000 - £5 million, equity investment from £50,000 to £5 million for established businesses, equity investment for early stage and mature technology-based businesses, co-investment alongside banks, crowd funders, grants, investors and other lenders.

All funding is discretionary and negotiable with no automatic entitlement to financial assistance.

Property Search

Attractive rental packages and rent-free periods are an integral part of the financial and support package available to investors in Cardiff.

Unlike most cities in the UK, Cardiff has both high quality sites and Grade A office space in the ownership of the private and public sector. This includes commercial offices and land in the city centre and Enterprise Zone as well as at city edge locations such as Cardiff Gate and St Mellons. Cardiff Council also has a portfolio of technology/incubation units which can be made available to investors requiring short term accommodation prior to occupying long term premises.

Post Investment Support

Cardiff prides itself in looking after its investors. Supported by the Welsh Government, the Invest in Cardiff team provides ongoing support to our existing businesses. Every investor has a dedicated account manager who will ensure you continue to have access to financial support schemes, business networks and relevant University departments in order to ensure your investment in Cardiff remains successful.

“

We have the knowledge and the skills to help your business prosper in Cardiff

”



Cardiff Castle

Invest in Cardiff is Cardiff Council's free and impartial inward investment service

For further information, please contact

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 Invest in Cardiff

 Invest in Cardiff

Disclaimer:

The purpose of this guide is to provide information to help recipients make their own judgements about making business decisions as to whether to invest or operate in Cardiff. The guide's contents were believed, at the time it was prepared, to be reliable, but no representations or warranties, express or implied, are made or given by Cardiff Council as to the accuracy of the guide, its completeness or suitability for any purpose. In particular, none of the guide's contents should be construed as advice or solicitation to purchase or sell securities, commodities or any other forms of financial instrument. No liability is accepted by Cardiff Council for any loss or damage, whether consequential or otherwise, which may arise out of or in connection with this guide.







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