Cardiff East Park and Ride, Llanrumney
Environmental Statement
Chapter 7: Socio-Economics

Iceni Projects Limited on
behalf of Curtis Hall Ltd

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7. SOCIO-ECONOMICS

Introduction

7.1 This chapter of the ES has been prepared by Iceni Projects Limited presents an assessment of the likely significant effects of the Proposed Development with respect to Socio-Economics. Mitigation measures are identified, where appropriate, to avoid, reduce or offset any significant adverse effects identified and/or enhance likely beneficial effects. Taking into account the mitigation measures, the nature and significance of the likely residual effects are reported

7.2 This chapter is supported by the following technical appendix:

- **Appendix 7.1**: Health Impact Assessment.

Competence

7.1 For a summary of the competence of the authors of this chapter, please refer to **Appendix 1.4**.

Legislation and Policy Context

Legislation Context

7.2 There is no legislation which is directly applicable to the assessment of socio-economic effects.

7.3 The following paragraphs provide a summary of key socio-economic policy objectives in Welsh national and local Cardiff planning policy. A comprehensive review of all relevant policies is set out in the accompanying Planning Statement.

National Planning Policy

Planning Policy Wales (2024)[i]

7.4 Planning Policy Wales (PPW) sets out the land use planning policies and principles for Wales and alongside a series of Technical Advice Notes provides the national planning policy framework for Wales.

7.5 The primary objective of the PPW is to ensure that the planning system contributes towards the delivery of sustainable development and improves the social, economic, environmental, and cultural well-being of Wales. Figure 4 identifies 'Key Planning Principles' which include sustainably growing the economy, making best use of resources (including land), facilitating accessible and healthy environments, creating and sustaining communities and maximizing environmental protection and minimizing impact.

7.6 Paragraph 2.26 sets out how to assess the sustainable benefits of development:

"Planning authorities should ensure that social, economic, environmental and cultural benefits are considered in the decision-making process and assessed in accordance with the five ways of working to ensure a balanced assessment is carried out to implement the Well-being of Future Generations Act and the Sustainable Development Principle."

7.7 The key economic considerations in the assessment process are listed as follows:

- The number and types of long-term jobs expected to be created or retained;
- Whether, and how far, the development will help redress economic disadvantage or support regeneration priorities, for example by enhancing local employment opportunities or upgrading the environment;
- The contribution the development would make to achieving wider strategies, for example the growth or regeneration of certain areas;
- The contribution this economic activity will have to wider policy goals;
- How the proposal would support the achievement of a more prosperous, low carbon, innovative and resource-efficient Wales.

7.8 PPW emphasises the importance of infrastructure in maintaining Wales's economic well-being. It recognises the need for digital connectivity in a modern economy. Paragraph 5.21 states:

"Affordable, secure electronic communications infrastructure is essential to people and businesses. The availability and exchange of information afforded by telecommunications ensures people are connected to important services, their communities and the wider world and is essential for long term prosperity. Fast, reliable connections are essential to meet the needs of businesses and other organisations, and to those at home accessing digital services and working. Greater numbers of individuals working from home are a growing trend and planning authorities should consider the implications of this when preparing their development plans."

Future Wales: The National Plan 2040 (2021)[ii]

7.9 Future Wales: The National Plan 2040 sets out the national development framework and spatial strategy for Wales which will act as a guiding framework for where large-scale change and nationally important developments will be focused over the next 20 years. It sets the strategy for addressing key national priorities through the planning system, including sustaining and developing a vibrant economy, achieving decarbonisation and climate resilience, developing strong ecosystems and improving the health and well-being of our communities.

7.10 Future Wales constitutes the national tier of the 3-tier planning system, with the preparation of Strategic Development Plans required in all four regions, filtering down to local development plans

at the local authority level. Policy 33: Cardiff, Newport and the Valleys will be the main focus for growth and investment in the South-East region. Strategic and Local Development Plans should recognise the National Growth Area as the focus for strategic economic and housing growth; essential services and facilities; advanced manufacturing; transport and digital infrastructure Inequalities in the four regions will be addressed by building stronger links between public services, communities and business.

7.11 The plan emphasises the importance of digital connectivity as a driver or economic growth and social inclusion. The economic action plan 'supports infrastructure development, including transport, energy and digital communications'.

Prosperity for All the National Strategy (2017)[iii]

7.12 Welsh Government through its National Strategy aims to build a Wales that is prosperous and secure, healthy and active, ambitious and learning, and united and connected. It focuses on four key themes: Prosperous and Secure, Healthy and Active, Ambitious and Learning, and United and Connected.

7.13 Through the Prosperous and Secure Theme, the Welsh Government aims to "break down the barriers many faces to getting a job, and create the right environment for businesses to grow and thrive". The Healthy and Active theme highlights the need to "deliver an integrated public transport network which supports our aim to enable people to travel more actively, by combining different types of transport with walking and cycling".

UK Industrial Strategy (2025)[iv]

7.14 The recently published strategy applying to England Scotland, Wales and Northern Ireland has a central aim of increasing business investment and grow the industries of the future in the UK. Within the first chapter 'Ease, speed and long-term stability for business' it states:

"Infrastructure provides the foundations high-growth sectors need to innovate, grow and compete globally. Digital infrastructure is crucial for almost every aspect of doing business and will underpin the AI revolution."

7.15 Specific to Wales, the strategy the strength of South Wales's semiconductor industry, noting it as a growth driving sector, and pledges investments in Welsh innovation and infrastructure to ensure greater connectivity, attract private capital and retain talent. Semiconductors are crucial to data centre operations, enabling processing, memory and data transfer. While within the chapter 'Digital and Technologies' it defines a key aim to:

"Unlock the potential of Digital and Technology clusters, concentrated in cities across the UK, including Glasgow and Edinburgh; Cardiff, Birmingham, Bristol, Oxford, and London."

7.16 Actions that accompany that aim include financial support for innovation and investing in R&D and scale-up infrastructure.

The Government of Wales Technical Advice Note 'TAN' 23 – Economic Development (2014)

7.17 Paragraph 1.2.5 states *"local planning authorities should recognise market signals and have regard to the need to guide economic development to the most appropriate locations, rather than prevent or discourage such development".*

7.18 Paragraph 2.1.1 states that planning should seek 'win-win' outcomes whereby economic objectives are not necessarily in conflict with environmental and social objectives. However, paragraph 2.1.2 also states that, where economic development would cause environmental or social harm which cannot be fully mitigated, careful consideration of the economic benefits will be necessary.

Local Planning Policy

Cardiff Capital Region Industrial and Economic Plan (2019)[v]

7.19 The Industrial and Economic Plan sets out the priorities facing the region over the next 20 years and aims to be flexible to adapt to new challenges. It indicates that the region performs relatively poorly in terms of economic productivity and competitiveness when compared to other UK regions. The Plan recognises that infrastructure is a key priority in boosting productivity and prosperity including employment spaces to meet the needs of businesses. It also outlines the need to target the most deprived communities by supporting regenerative growth.

Cardiff Capital Region City Deal Strategic Business Plan Wider Investment Fund 2021-2026 (2017)[vi]

7.20 The five-year City Deal Strategic Business Plan sets out the current understanding of what is required to achieve Cardiff City Region's long-term objectives, including details of how the Wider Investment Fund will be used over the next five years, whilst forming the basis of a more detailed regional strategic economic growth plan and strategy. Its vision of "A Prosperous Capital City-Region for Wales" is underpinned by three Regional Strategic Objectives:

- Prosperity and Opportunity – Building the capacity of individuals, households, the public sector and businesses to meet challenges and grasp opportunity creating a more productive economy.
- Inclusion and Equality – A vibrant and sustainable economy which contributes to the well-being and quality of life of the people and communities in the region now and in the future.
- Identity, Culture, Community and Sustainability – Forging a clear identity and strong reputation as a City-Region for trade, innovation, and quality of life.

7.21 The Prosperity and Opportunity priority identifies the need to nurture the economic environment by providing the right infrastructure and supporting all businesses to become more productive such as by enhancing the business climate.

Cardiff Local Development Plan (2016)[vii]

7.22 The Cardiff Local Development Plan sets out the priorities and commitments for Cardiff until 2026. The overall vision for the Plan is that Cardiff will be "a world-class European capital city with an exceptional quality of life and at the heart of a thriving city-region".

7.23 One of the seven cross-cutting themes of the plan is a thriving and prosperous economy. To achieve this the plan aims to create an environment that develops, attracts and retains skilled workers, businesses and entrepreneurs in Cardiff. It also seeks to provide the level of urban design infrastructure and connectivity required to make Cardiff a great place to work and do business.

7.24 The Site is not allocated meaning Policy EC7 of the LDP applies. Policy EC7 states that "proposals for employment use (B Use Class) on unallocated sites will be permitted provided that:

- The proposal cannot reasonably be accommodated on existing employment land;
- The site falls within the settlement boundary and has no specific policy designation;
- The use is compatible with uses in the surrounding area;
- The proposal is well related to the primary highway network and accessible to sustainable modes of transport.

7.25 The Site falls within the settlement boundary and has no specific land use policy designation or allocation. Therefore, the Proposed Development meets the second criterion.

Cardiff Draft City Recovery and Renewal Strategy (2021)[viii]

7.26 The draft strategy provides Cardiff City Council's initial response to the Covid-19 pandemic, outlining the initial actions needed to help the city economy recover alongside the longer-term priorities for renewal.

7.27 Priorities within the strategy include the need to support existing businesses to grow and become more productive, and making Cardiff fully accessible to all ages, and people with disabilities underpinned by a fully integrated transport system.

Assessment Methodology and Significance Criteria

7.28 This section presents the methodology used to assess the potential effects of the Proposed Development in relation to Socio-Economics.

Consultation

7.29 An EIA Scoping Report was submitted to Cardiff Council (CC) on 7th December 2022 relating to the previous development proposals on Site. The Scoping Response confirmed EIA was required on 17th

December. No comments were made about the proposed scope of the socio-economic chapter. On this basis, the assessment has been completed in line with the Scoping Report.

7.30 This ES will be standalone from the 2022 ES associated with the previous development proposals on Site. Given the similarities in the development build and on account of the fact that CC already has an understanding of the likely significant environmental effects due to the 2022 ES approach is not to submit a new EIA Scoping Request.

Study Area and Scope

Study Area

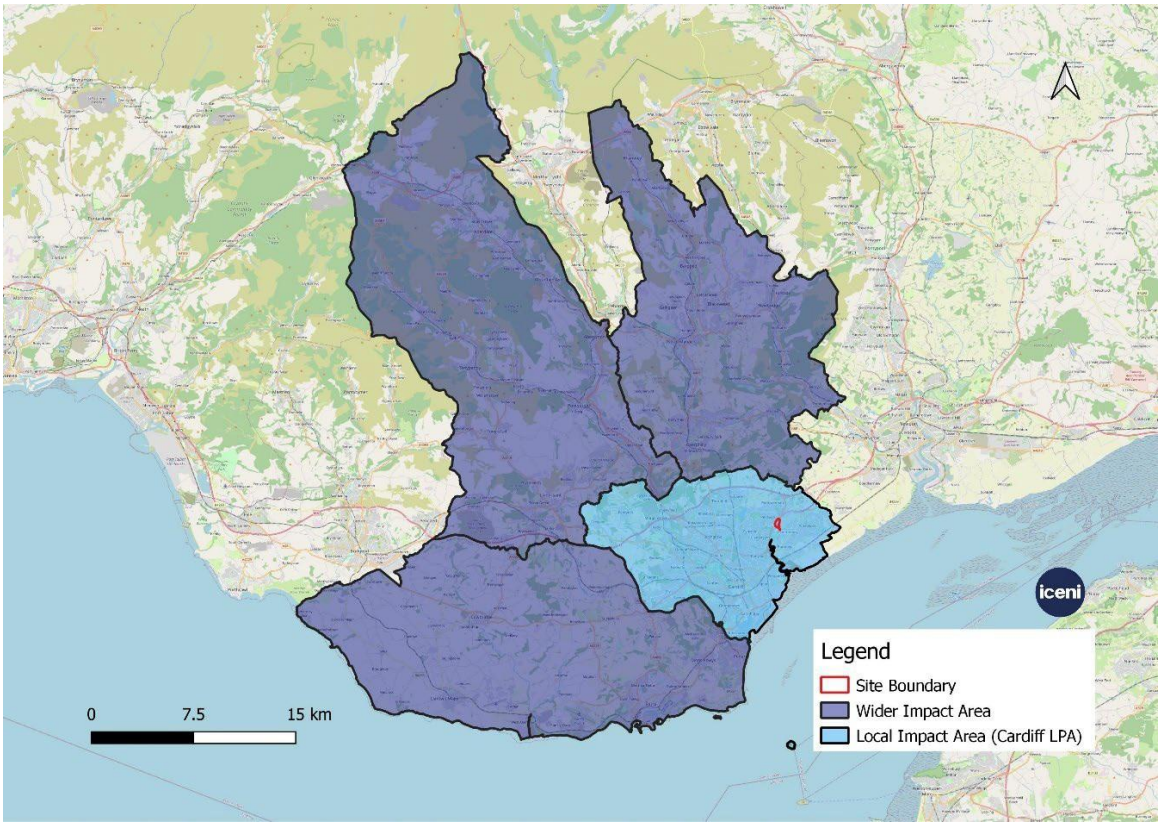
7.31 It is important when assessing the socio-economic effects, that the geographical scope of the assessment is clearly understood. Given the nature, scale and location of the Proposed Development, the Cardiff City Council boundary has been identified as an appropriate Local Impact Area. A Wider Impact Area has also been proposed, this includes the Local Authorities of The Vale of Glamorgan, Rhondda Cynon Taf, and Caerphilly. The Wider Impact Area has been established by analysing commuting pattern data (Census, 2011) of people who work in Cardiff. In total, people that originate their commute in these local authorities combined with Cardiff, represent 84.6% of people that work in Cardiff.

7.32 The site is located within the Lower Super Output Area (LSOA) Pentwyn 3, where data from the Indices of Multiple Deprivation is applied to assess local socio-economic conditions

7.33 The extent of this impact area may be varied for some receptors following best practices or the availability of data. Where this is the case, this will be highlighted within the ES chapter. Indirect or multiplier effects of the Proposed Development, for example concerning the wider economy, will also be considered. A map of the proposed Impact Areas is shown in **Figure 7.1** below.

7.34 The data used for the baseline reflects the current position at the time of completing the HIA (November 2025), therefore the most recently published data for each receptor assessed has been used.

Figure 7.1 Local and Wider Impact Area Map



Scope

7.35 The following aspects are not considered in the ES because potential effects on these receptors are not likely to be significant:

- Housing provision;
- Green infrastructure;
- Education;
- Effects to recreational and community facilities;
- Health facilities

Assessment Methodology

Impact Areas

7.36 There is no statutory definition or Government guidance relating to the assessment of socio-economic effects. Therefore, the evaluation of the effects of the Proposed Development is based on an estimate of the magnitude of the effect and the importance of the identified receptor. The location of the effects and their likely duration are considered where possible. However, in instances where effects cannot be quantified or measured. The assessment is based on qualitative factors.

Significance Criteria

7.37 The scale attributed to each effect has been determined based on the sensitivity of the receptor and magnitude of impact arising as a result of the Proposed Development. Professional judgement and experience have been drawn upon to assess the scale and significance.

Receptors and Receptor Sensitivity

7.38 The sensitivity of each receptor was evaluated as being high, medium, low or negligible based on a review of the baseline position of each receptor and its performance against benchmark areas. The receptors and the definition of sensitivity of a receptor (high, medium, low) is based on a scale set out in **Table 7.1**.

Table 7.1 Receptor Sensitivity Description

Value (Sensitivity)	Description
High	The economic or social infrastructure receptors are operating at full capacity with no surplus capacity for additional demand arising from additional residents. A receptor may also be considered highly sensitive if identified as a priority in national, regional or local strategies or policies.
Medium	The economic or social infrastructure receptors are operating at near capacity levels with limited surplus capacity for additional demand arising from additional residents.
Low	The economic or social infrastructure are operating below capacity with excess surplus capacity.
Very Low	Receptors of limited or no importance.

Magnitude of Impact

7.39 The magnitude of impact to a receptor has been determined by considering the estimated deviation from baseline conditions both before, and, if required, after mitigation. The scale used for determining the magnitude of an impact has been based on **Table 7.2**.

Table 7.2 Magnitude of Impact Description

Impact Magnitude	Description
High	The Proposed Development could be expected to have substantial effects (by extent, duration, or magnitude) of more than local significance on the key elements/features of the baseline conditions, including the population profile, levels of employment, levels of deprivation and facility provision.
Medium	Where the Proposed Development could be expected to have notable effects on the key elements/features of the baseline conditions, including the population profile, levels of employment, levels of deprivation and facility provision.

Low	Where the Proposed Development could be expected to have slight, short or localised effects on the key elements/features of the baseline conditions, including the population profile, levels of employment, levels of deprivation, and facility provision.
Very Low	Where the Proposed Development could be expected to result in very little/no distinguishable change from the baseline conditions including the population profile, levels of employment, levels of deprivation, and facility provision.

Assessing Significance

7.40 **Table 7.3** provide a matrix for determining the significance of an effect based on the sensitivity of the receptor and the magnitude of impact.

Table 7.3 Significance of Effect Matrix

Receptor Sensitivity	Magnitude of Impact			
	High	Medium	Low	Very Low
High	Major Beneficial / Adverse	Major Beneficial / Adverse	Moderate Beneficial / Adverse	Minor Beneficial / Adverse
Medium	Major Beneficial / Adverse	Moderate Beneficial / Adverse	Minor Beneficial / Adverse	Negligible
Low	Moderate Beneficial / Adverse	Minor Beneficial / Adverse	Negligible	Negligible
Very Low	Minor Beneficial / Adverse	Negligible	Negligible	Negligible

7.41 Effects classified as major or moderate are considered 'significant'. Effects classified as minor or negligible in scale are considered 'not significant'.

Limitations and Assumptions

7.42 To inform the assessment, secondary data sources have been used throughout. These include the Office of National Statistics (ONS), Stats Wales, and the Welsh Index of Multiple Deprivation (WIMD). While the latest available data has been used, it should be noted that many data sources are frequently updated and could be subject to change since the time of drafting this EIA Chapter or during the planning application process. Sources are referenced.

7.43 The end user(s) of the Proposed Development is currently not known. However, given the nature of the development as a data centre, with associated energy centre, it is assumed that the scheme will fall principally within classes B8 and E(g) of the Town and Country Planning (Use Class) order 1987.

Health Impact Assessment Methodology

7.44 To support the socio-economic chapter a Health Impact Assessment (HIA) is provided in **Appendix 7.1.** There is no prescribed methodology for assessing the health impacts of development proposals however, the methodology applied within this assessment draws on best practice approaches and examples. The following documents helped devise the assessment methodology;

- **Wales HIA Checklist (A Practical Guide)-** this tool, published by the Wales HIA Support Unit, is designed to assess the likely health impact of development plans and proposals including planning frameworks and masterplans for large areas, regeneration and estate renewal programmes and outline and detailed planning applications;
- **Health in Environmental Impact Assessment, A Primer for a Proportionate Approach (2017)-** this document, published by the Institute of Environmental Management and Assessment (IEMA) provides guidance and recommendations for considering the population and human health.

7.45 The full methodology is outlined in the Health Impact Assessment.

Baseline Conditions

Establishing Baseline Conditions

7.46 This section draws upon data published by established sources such as the ONS, the Higher Education Statistics Agency (HESA), the Welsh Index of Multiple Deprivation (WIMD), Public Health Wales and info base Cymru, a data repository supported by Data Cymru.

Baseline Conditions

7.47 This section will include a description of the environment as it currently stands. The baseline position will be taken as the current conditions on the application site, taking account of the planning designations and assuming that all existing land uses in the surrounding area beyond the site remain.

7.48 This section establishes the existing demographic profile, economic context and local labour market characteristics, and level of deprivation in the Local Impact Area. The Wider Impact Area and Wales are used as comparator locations where appropriate.

Demographic Profile

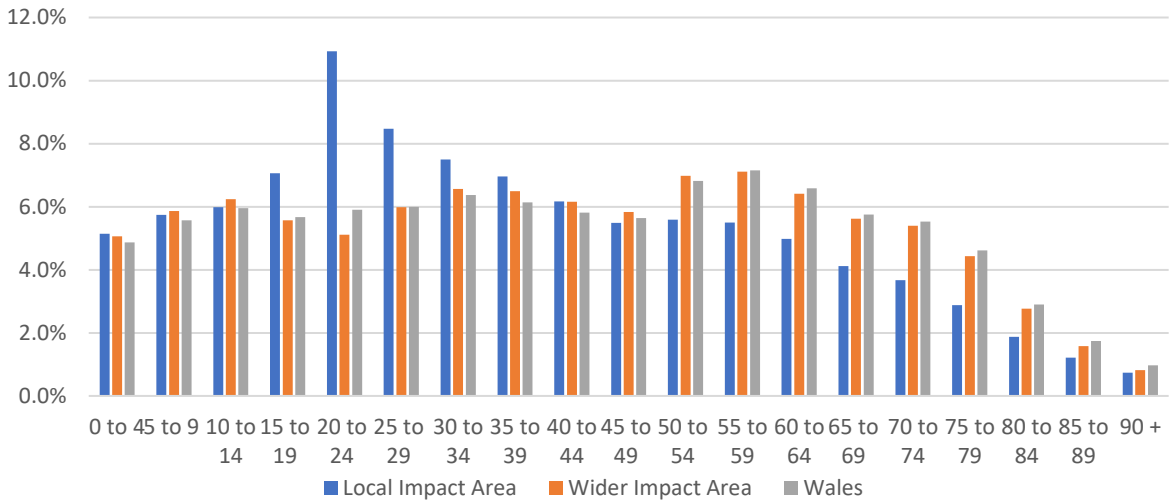
7.49 Mid-year population estimates for 2022 show that the population of Cardiff is around 274,035 people.

Ages

7.50 **Figure 7.2** provides a comparison of the population age structure in the Local Impact Area, Wider Impact Area and Wales. Cardiff has a relatively young population with a significantly higher proportion of the population aged 20 to 34 (26.9%) compared with the Wider Impact Area (17.7%) and Wales (18.3%). There is a noticeable peak in the 20-29 years cohort, which may in part be owing

to the large student population in the city. Conversely, the Local Impact Area has a smaller proportion of the population aged 45 and over (36.0%) when compared with the Wider Impact Area (47.0%) and Wales (47.7%).

Figure 7.2 Age Profile of the Local Impact Area, Wider Impact Area and Wales[ix]



Source: ONS mid-year population estimates 2022

Working-age Population

7.51 The Local Impact Area has a slightly higher proportion of the population classified as working age (16-64 years) (67.5%) when compared with the Wider Impact Area (61.0%) and Wales as a whole (60.9%).

Economic Indicators

Labour Supply

7.52 **Table 7.4** reports the ONS annual population survey figures for the labour supply from April 2024 to March 2025. Within the Local Impact Area, there are more people economically active (77.2%) when compared to the Wider Impact Area (74.1%) and Wales (76.1%). There is a higher proportion of people who are unemployed in the Local Impact Area (5.1%) than in both the Wider Impact Area (3.0%), and Wales as a whole (3.6%).

Table 7.4 Employment and Unemployment, Year throughout March 2025

	Local Impact Area	Wider Impact Area	Wales
Economically Active	77.20%	74.10%	76.10%
In Employment	73.20%	71.90%	73.40%
Employees	67.20%	66.00%	65.20%
Self Employed	6.00%	5.80%	7.80%

Unemployment	5.10%	3.00%	3.60%

Source: ONS Annual Population Survey, 2024/25

Median Annual Wage

7.53 In 2024, the median average weekly pay for residents in Cardiff was £693.40 for full-time employees (FTE) in Cardiff. This is marginally higher than the Welsh average which was £684.4 per week (per FTE)[x].

7.54 For comparison, in the same year, the workplace-based earnings in Cardiff were marginally higher at £697.70 per week (per FTE) when compared to the national average at £674.50.

Qualifications

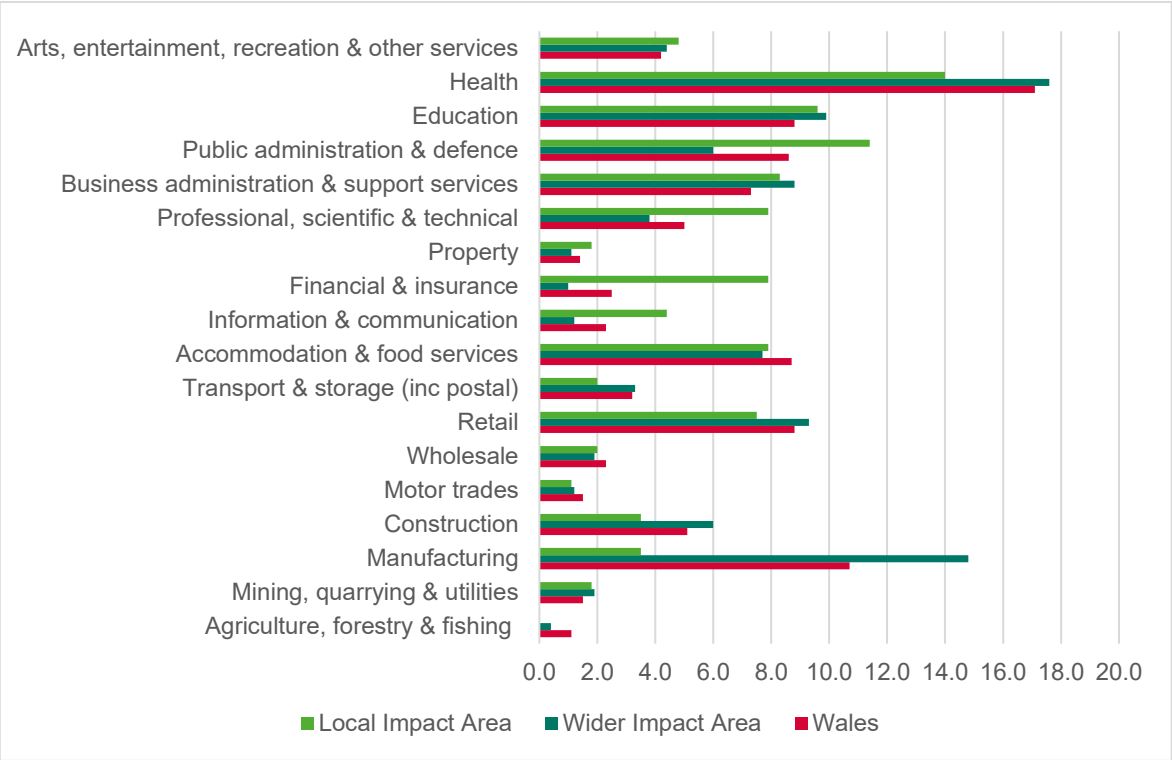
7.55 APS data[xi] shows that nationally 44.0% of Welsh residents have RQF4 qualifications or higher. This falls to 39.6% for the Wider Impact Area but is much higher (54.4%) in the Local Impact Area. RQF4 qualifications are equivalent to the first year of a bachelors degree. The high level of qualification attainment in the Local Impact Area is likely to be linked to the prevalence of higher education institutions, as four universities are located in Cardiff.

7.56 19.9% of Welsh residents have no formal qualifications compared to 22.1% in the Wider Impact Area and only 16.3% in the Local Impact Area.

Industries

7.57 The Business Register Employment Survey (BRES)[xii] (2023), provides data on the proportion of an area's Industry Employment Sectors. As shown in **Figure 7.3**, in the Local Impact Area, the highest proportion of people work in Health sector (14.0%) followed by Public Administration and Defence sector (11.4%) and Education sector (9.6%). Conversely, the agriculture sector (<0.1%), Motor Trades sector (1.1%), Mining, Quarrying and Utilities sector (1.8%) and Property sector (1.8%), have the lowest employment rate in the Local Impact Area.

Figure 7.3 Proportion of Industry Employment Sector, 2023



Source: BRES, 2023

Cardiff Data Centre Economy

7.58 Cardiff plays a central and strategic role in Wales's digital economy, acting as both a technology hub and a policy leader in digital transformation. It is home to a growing tech economy, including fintech, cybersecurity and a growing number of AI startups. The economic and innovation benefits resulting from the cluster of digital firms in Cardiff are known as agglomeration effects. These can be summarised as:

- **Talent concentration and knowledge spillovers**: High student numbers in Cardiff combined with colocation of startups, scaleups, and research centres like the Digital Transformation Innovation Institute ensure a steady stream of talented graduates as well as opportunities for collaboration and innovation[xiii].
- **Network density**: Proximity to other high growth sectors supported by the Cardiff Capital Region's Cluster Development Programme enables shared infrastructure. This lowers operational costs and increases opportunities for partnerships[xiv].
- **Infrastructure Synergies**: Cardiff's investment in full-fibre broadband and 5G creates a digitally connected environment that is both beneficial to data centre operations[xv], and which additional data centres contribute to.
- **Labour market efficiencies**: Concentration of tech talent enables firms to hire more efficiently, while workers benefit from career progression within the same geographic area, increasing industry retention and productivity.

- **Innovation and Investment Attraction**: The existence of Cardiff's digital hub attracts venture capital, government funding and international partnerships that further grow its presence[xvi].

7.59 Cardiff's universities, especially Cardiff University and Cardiff Metropolitan University, are a driving force in developing the district into a digital hub. In the 2023/24 academic year 11,445 students enrolled across Cardiff University, Cardiff and Vale College and Cardiff Metropolitan University[xvii], while across Wales, 12,125 students have enrolled in mathematical science, computing and engineering higher education courses[xviii]. This demonstrates Cardiff's large pool of emerging talent available to potentially work in new data centre developments.

7.60 Key infrastructure such as the UK SuperGrid plays a pivitol role in data centre growth in Cardiff through providing access to direct high voltage energy supply at 400kV, one of the highest capacity connections available in the UK. This ensures stable, scalable and uninterrupted power. The SuperGrid connection allows data centres to draw from 100% renewable energy sources, supporting sustainability goals and reducing carbon footprints.

7.61 The combination of a large talent pool, existing digital infrastructure and a large and growing customer base of firms requiring high performance computing, cloud hosting and colocation services make Cardiff an ideal location for data centre development.

7.62 While data centres have low operational job numbers, their services facilitate growth in jobs in the wider economy as:

- The digital sector grows as a portion of all industry in both Cardiff and the UK
- Non digital sector roles rely increasingly on the services of data centres

7.63 As such, data centres represent critical physical infrastructure enabling the UK to remain internationally competitive.

Deprivation

7.64 The Welsh Indices of Multiple Deprivation (IMD) provides a ranking of neighbourhoods (LSOAs) to compare levels of deprivation across the country. To calculate the rank of an area , eight domains – income, employment, education, health, access to services, community safety, the physical environment and housing – are measured to produce an overall relative measure of deprivation.

7.65 The Site falls within the 12th most deprived LSOAs out of a total of 214 LSOAs in Cardiff and amongst the 10% most deprived LSOAs in Wales.

7.66 **Table 7.5** below breaks down the eight domains that make up the IMD for the Proposed Development's Site LSOA according to the overall rank and decile[xix]. Overall, the area performs poorly for most indicators

apart from access to services (4th decile). The Site is located in an area that is extremely deprived in terms of income, employment, health, education, community safety and physical environment.

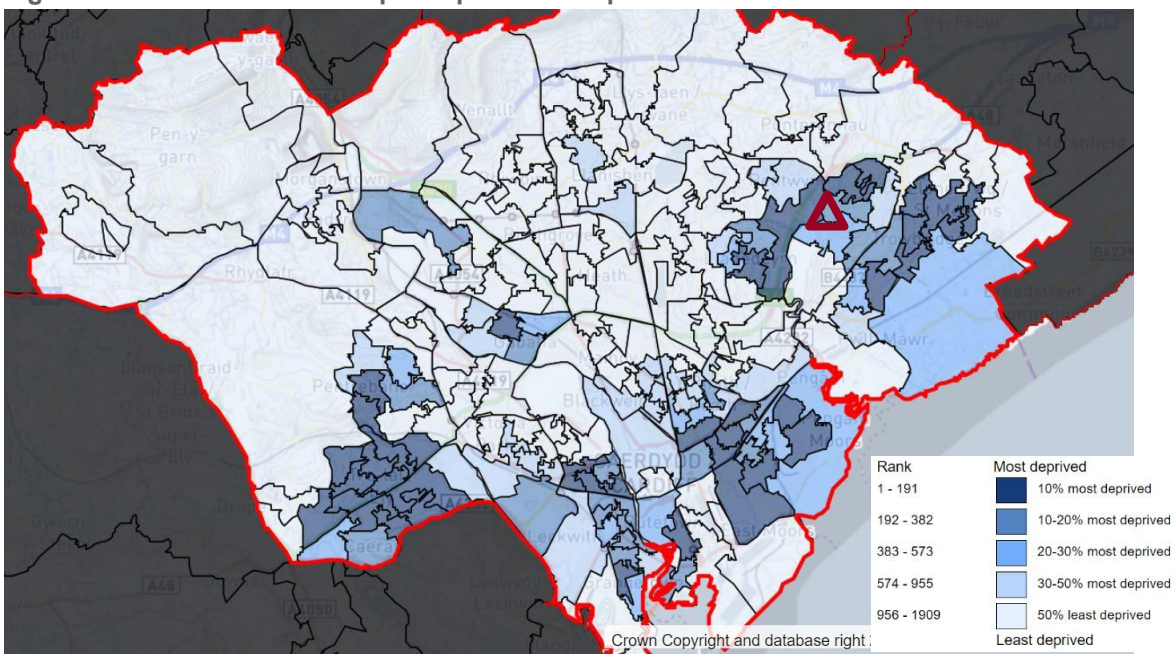
Table 7.5 Welsh Index of Multiple Deprivation, 2019 for LSOA Pentwyn 3

Domain	Rank (Out of 1,909 LSOAs)	Decile (where 1 is the most deprived and 10 is the least deprived)
Income	31	1st
Employment	168	1st
Health	97	1st
Education	124	1st
Access to Services	717	4th
Community Safety	89	1st
Physical Environment	129	1st
Housing	499	3rd
Overall	63	1st

Source: Welsh Index of Multiple Deprivation, 2019

7.67 **Figure 7.4** maps the Welsh Index of Multiple Deprivation ranks for LSOAs across Cardiff. The LSOA in which the site lies ranks in the 10% most employment deprived in Wales. In the surrounding area (including Pentwyn, Llanrumney and Llanedeyrn but also slightly further east) many LSOAs demonstrate high levels of deprivation.

Figure 7.4 Welsh Index of Multiple Deprivation Map – Cardiff



Source: WIMD, 2019. The site is marked by a red triangle.

Socio-economic Classification

7.68 Based on the Area Classification for Output Areas data[xx], the population of the Site and surroundings are classified as comprising primarily "Multicultural Metropolitans". Multicultural Metropolitans are typically classified as having the following traits:

- The population of this supergroup live in larger urban conurbations in the transitional areas between urban centres and suburbia;
- They will tend to live in terraces housing that is rented, both private and social;
- The group has a higher ethnic mix, but a below-average number of UK and Irish-born residents. As a result, households are less likely to speak English or Welsh as their main language;
- Residents are likely to be below retirement age. There is likely to be an above-average number of families with children who attend school or college, or who are currently too young to do so;
- The level of qualifications is just under the national average with rates of unemployment being above the national average. Residents who are employed are more likely to work in the transport and administrative-related industries; and
- Public transport is the most likely method for individuals to get to and from work since households are less likely to have multiple motor vehicles to them.

Health Profile

7.69 A more detailed health profile is presented in the Health Impact Assessment in **Appendix 7.1**. However, below is a high-level analysis of key health statistics provided by data from Public Health Wales that compares the health of the residents in Cardiff with trends across Wales across a range of indicators:

- Life expectancy at birth in Cardiff is 78.1 for males and 82.3 for females, which is slightly higher than the national averages (77.9 for males and 81.8 for females)[xxi]
- The proportion of children aged 4 and 5 who are considered obese in Wales increased from 11.3% in 2012/13 to 12.4% in 2019/20 but has since decreased to 11.4% in 2022/23[xxii]. The rate for Cardiff and Vale University Health Board is lower at 9.3%, the lowest rate of all health seven health boards across Wales.
- The general fertility rate (live births per 1,000 women aged 15 to 44) is 54.6[xxiii] in Cardiff.
- When compared with the other seven health board providers in Wales, Cardiff and the Vale ranked 4th for the number of emergency admissions as a proportion of total admissions for all causes at all ages. In terms of waiting times, it had the second lowest mean waiting time[xxiv].
- The proportion of people who reported having a long-term illness or disability that limits their day-to-day activities in Cardiff is 18.6%, which is lower than in Wales where it is 21.6% of people[xxv].

- Cardiff has the lowest crude rate of lung cancer patients in Wales at 50.7 per 100,000 of the population, while the age standardised rate stands at 76.7. It has the lowest crude rate for all cancers in Wales as of 2021.

Receptors

7.70 The following receptors in **Table 7.6** have been identified as being subject to potentially significant socio- economic effects associated with the construction and operation of the Proposed Development.

Table 7.6 Existing and Future Sensitive Receptors

Receptor		Indicators	Sensitivity
Economy	The size, profile and value of the local economy.	Economic output (measured by GVA), business rates, employment, industry mix.	Low
	People in employment or seeking employment.	Labour supply, education and skills, economic activity	Medium
Communities	Socio-economic profile	Deprivation levels	High

Future Baseline

7.71 The future baseline conditions help to identify any changes anticipated in the baseline conditions in the absence of the Development.

Population Growth

Table 7.7 Population Projections for Cardiff

Projected Year	Total	Aged 0 to 15	Aged 16 to 64	Aged 65+
2022	368,090	67,883	246,392	53,815
2027	374,379	65,479	250,499	58,401
2032	380,800	63,204	254,216	63,380
2037	385,070	63,548	254,725	66,797
2042	388,195	65,021	254,958	68,216
CAGR (%) 2022 - 2042	0.27%	-0.22%	0.17%	1.19%

Source: Stats Wales, Population projections by local authority and year

7.72 Population growth in Cardiff is expected to be positive overall up to 2042. Growth is driven by the 65+ age bracket with an average growth rate of 1.19% per annum (**Table 7.7**). The working-age population is expected to register slower growth (0.17%) while the 0-15 age group is expected to see a slight decline in population growth (-0.22%).

7.73 The higher population growth in the 65+ age bracket suggests pressure in the future upon public services, particularly health services, and potential issues in filling vacancies and replacing capabilities and skill levels, as well as volume levels, within the current workforce.

Assessment of Effects (Construction and Operational)

7.74 This section considers the socio-economic effects associated with the Proposed Development during the construction and operational phases. Effects are considered for both the Local Impact Area and the Wider Impact Area. The Proposed Development is expected to have a capacity ranging from 120MW to 150MW upon completion. Accordingly, we have presented the anticipated impacts as a range, with the lower bound reflecting estimates based on a 120MW capacity and the upper bound representing projections for a 150MW capacity.

Environmental Design and Management

7.75 No embedded mitigation measures have been taken into account when preparing the assessment,

Effects During Construction

7.76 The capital construction cost of the Proposed Development will range between £1,108.6m and £1,385.8m. This has been derived from Savills data on construction cost per MW output[xxvi], ONS currency conversion rates[xxvii] and ONS produced construction price output indices[xxviii].

7.77 It will represent a significant injection of private sector investment within Cardiff in the short term which in turn will support direct and indirect employment as well as generate economic output. It is expected that the redevelopment of the Site will take approximately 18 months, with construction taking place over 2026 and 2027. The Proposed Development is expected to be operational by 2028.

Direct Employment

7.78 To estimate the number of construction jobs likely to be supported during the build phase, data from existing UK data centre developments has been drawn on and supplemented by professional experience working with developers to assess the economic impact of similar past projects. While those undertaking the construction of data centres are typically paid between 10% to 20% higher than their counterparts working on traditional commercial construction projects[xxix] the substantial infrastructure and IT equipment costs associated with data centre construction result in labour accounting for a smaller share of overall investment compared to most other industrial projects. Regarding the Proposed Development, an estimated 404 – 505 direct construction jobs will be created throughout the construction period. This is the equivalent of 202 – 253 jobs per year of construction.

7.79 The number of construction workers on-site at any one time will vary as the development phases progress.

7.80 Construction workers tend to be mobile, therefore it is more appropriate to consider the impact across the Wider Impact Area. The estimated level of employment over the construction period represents a 5% increase in the number of construction jobs in Cardiff.

Indirect and Induced Employment

7.81 In terms of construction employment, the level of displacement is the number of the 404 – 505 direct jobs that would be supported elsewhere in the study area if the Proposed Development did not take place. Labour resources are finite and therefore labour requirements can lead to a reduction in employment elsewhere. However, construction labour tends to be highly mobile and flexible meaning levels of displacement tend to be lower than for employment in general. On this basis, it is considered appropriate to apply a low discount for displacement (1025%) for Wales in line with HCA guidance.

7.82 The level of leakage is the proportion of jobs which are taken by those who are not residents in Cardiff. Data from the Office for National Statistics suggests that 59% of local jobs are taken by residents in Cardiff. As a result, 41% of local jobs are expected to be taken by residents outside of the Local Impact Area.

7.83 To deduce the indirect employment effect a multiplier has been applied in line with evidence specific to data centre development. A report published in November 2024[xxx] by TechUK found that for every job supported by the construction of data centres, between 1.4 and 3.1 jobs are created elsewhere in the economy. We take the midpoint of this range to estimate indirect and induced jobs supported. This multiplier has been applied to both Wales and Cardiff as local specific information is unavailable for data centre construction.

7.84 Applying the additionality assumptions to the estimated direct construction jobs it is estimated that the Proposed Development is likely to support a further 682 – 852 indirect jobs across Wales during the construction period and 483 - 501 jobs indirect jobs in Cardiff.

Table 7.7 Summary of Construction Employment Direct and Indirect

	Cardiff		Wales	
	lower bound	upper bound	lower bound	upper bound
Gross Direct Employment	404	505	404	505
Displacement	10%	10%	25%	25%
Leakage	41%	41%	0%	0%
Multiplier	3.25	3.25	3.25	3.25
Net Additional Employment	483	501	682	852
Per Year	242	603	341	426

Total Employment over construction period (direct and indirect/induced)	**646**	**1,006**	**1,086**	**1,357**

Source: Iceni Analysis, 2025

7.85 The direct and indirect employment generated during the construction phase is assessed as having a **short-term, temporary and minor beneficial** effect across the Local and Wider Impact Areas.

Economic Value Added

7.86 The contribution of construction work to the economy can be measured by Gross Value Added (GVA). GVA is a measure of the contribution to GDP made by an individual producer, industry, sector or in this case development. The average GVA in the Welsh construction industry is £51,287[xxxi] per worker.

7.87 Applying this to the direct construction employment impact of the Proposed Development results in a direct GVA of over £20.7 million - £25.9 million over the build period.

7.88 The indirect GVA generated from the construction of the Proposed Development is derived using a multiplier from the 2024 TechUK report which states that from their research, a range of between 1.29 and 1.97 was observed. We use the midpoint of this range (1.63) to calculate indirect GVA effects over the construction period of £13.1 million to £16.3 million. Combining both direct and indirect GVA generated over the construction period gives a GVA effect of £33.8 million to £42.2 million.

7.89 The GVA generated during the construction phase of the Proposed Development is assessed as having a **short-term, temporary, minor beneficial effect** (not significant) across the Local and Wider Impact areas.

Effects Once the Proposed Development is Operational

7.90 It is estimated that the build-out period of the Proposed Development will be 18 months (or 2 years) post-planning. Therefore, it can be expected the Proposed Development will be fully operational in 2028.

Operational Employment

7.91 The precise number of jobs that will be supported will depend on the MW capacity of the Proposed Development once operational as well as the number of tenants anticipated as co-location facilities tend to create a larger number of on-site roles than data centres with only one tenant. In addition, AI data centres require more roles in maintenance and management than in data centres that are not heavily AI focused. Based on both professional experience working with developers on similar

projects and case study research, it is estimated the number of direct jobs created in association with the Proposed Development will be between 100 – 125 roles.

Indirect Employment

7.92 In 2024, TechUK found that for every job created by data centre operations, between 1.4 and 2.5 jobs are created elsewhere in the economy. We take the midpoint of this range to represent the multiplier for indirect and induced jobs created from the on-site roles. This gives between 195 and 244 indirect and induced jobs created through the supply chain and in the local service economy.

7.93 The employment generated during the operational phase of the Proposed Development is assessed as having a **long-term, permanent, minor beneficial effect** (not significant) across the Local and Wider Impact areas.

Economic Value Added

7.94 The GVA of a newly built data centre is calculated using findings from the 2018 digital reality report, uprated for both digital sector inflation and GVA growth in the digital subsector which data centres fall into (information and communication), and scaled for the MW capacity of the Proposed Development. As such the resulting range for total GVA generated by the Proposed Development is estimated to reach between £668.9 million and £700 million.

7.95 Using data published by DCMS[xxxii] and Digital Reality[xxxiii] and ONS[xxxiv], Iceni Projects have estimated that the GVA per data centre job in Wales is £106,794. Given the range of 100 – 125 roles created directly on site, this equates to £10.7 million to £13.3 million in direct operational GVA.

7.96 The most recently published ONS data on GVA by geography and industry[xxxv], and workforce jobs by geography and industry[xxxvi] show that across all industries, the average GVA per worker in Wales is £55,179. Given the range of indirect and induced jobs created by the Proposed Development(195 – 244), this will generate between £10.8 million and £13.4 million in Indirect GVA. This results in between £21.4 million and £26.8 million in combined direct and indirect GVA.

7.97 Given the total GVA of the newly built data centre noted in paragraph 7.87, the remaining £647.5 million - £673.1 million GVA once productivity from direct, indirect and induced jobs are subtracted is expected to pertain to data enabled jobs. These are roles that depend upon the computing power, storage, and connectivity that data centres provide. While digital sector roles are becoming increasingly important to build the UK's international competitiveness, the sectors and industries which rely on the services of data centre activities is expanding rapidly, with most service sector roles quickly adopting productivity enhancing technology.

7.98 The data enabled roles supported through the Proposed Development are likely to be spread across the UK. As such, we use a UK wide figure for GVA per worker in the digital sector (£86,274) to

estimate the number of data enabled roles created. This figure has been calculated using DCMS data on jobs and GVA across all digital sector subsectors.

7.99 Dividing the data enabled GVA generated by the data centre (£647.5 million - £673.1 million) by the UK wide GVA per worker in the digital sector, gives a range of 7,505 - 7,803 data enabled roles. Given the current spread of digital sector roles across the UK according to DCMS jobs and GVA data, 3% of these will be located in Wales. This equates to 216 jobs and £19.8 million in GVA effect.

7.100 **Table 7.8** below provides a breakdown of these operational effects.

Table 7.8 Summary of Operational Effects

	lower bound	upper bound
MW Capacity	120	150
GVA generated from the newly built data centre £	668,908,364	699,977,840
Direct jobs	100	125
Direct GVA £	10,679,440	13,349,300
Indirect and induced jobs	195	244
Indirect GVA £	10,759,905	13,449,881
Data enabled jobs (UK)	7,505	7,803
Data enabled jobs (Wales)	216	225
Data enabled GVA (UK) £	647,469,019	673,178,659
Data enabled GVA (Wales) £	19,759,934	20,544,560

Source: Iceni Analysis, 2025

Deprivation

7.101 The Site falls within an LSOA that experiences the highest levels of deprivation for Wales. Income, Employment, Health, Education, Access to Services, Community Safety and Physical Environment are all ranked in the lowest domain of deprivation for Wales (see **Table 7.5**).

7.102 When focusing on the Employment and Income domains of deprivation, the Site and surrounding area show a particularly high percentage of residents in receipt of employment and income-related benefits and tax credits. In the three LSOAs surrounding the site, there were 190 claimants as of September. This highlights the need for the employment opportunities that the Proposed Development provides of which a proportion will be entry-level roles making them accessible to a wide range of skills levels.

7.103 The Proposed Development will also include a new bridge link to the residential community that is located behind the Site. The inclusion of this new infrastructure with a shared cycleway and footpath will help to promote active travel to the Site. Doing so improves the overall health, access to services and physical environment of the Site. The inclusion of street lighting will also improve the community

safety surrounding the Site. Such measures will again improve the overall deprivation rank of the Site

7.104 Overall, the Proposed Development will provide employment opportunities, and access to services and improvements to the local environment which will assist in addressing the root causes of deprivation that the Site and the surrounding area currently experience. Therefore, the impact of the Proposed Development on deprivation levels will have a permanent, **moderate beneficial effect** in the Local Impact Area and **a permanent, minor beneficial effect in the Wider Impact Area**.

Mitigation Measures

7.105 The Proposed Development is expected to result in a range of beneficial outcomes, specifically in terms of generating employment and economic output during both the construction and operational phases. The mitigation measures detailed below have been proposed to enhance the beneficial impacts identified.

Mitigation During Construction

7.106 The construction employment opportunities to be created by the Proposed Development are expected to lead to short-term, temporary moderate beneficial effects. However, several measures or initiatives could be considered to maximise the local benefits of the scheme. Examples of such measures may include: providing full and fair employment opportunities, training and education opportunity for residents; encouraging procurement opportunities for local businesses to source products and services locally where possible and practical; and, establishing links with local businesses to offer training and employment opportunities via work experience and apprenticeship schemes. These measures would be subject to discussions with Cardiff Council and other relevant bodies and could be explored as part of planning conditions for the application.

Mitigation Once the Proposed Development is Operational

7.107 No adverse effects have been identified following assessment once the Proposed Development is operational and therefore no further mitigation measures are required.

7.108 The operation employment opportunities created by the Proposed Development could also be enhanced by local employment initiatives. Examples include apprenticeship schemes or working with engaging with ‘hard to reach’ groups.

Residual Effects and Monitoring

7.109 Residual effects are those which would remain once any proposed mitigation measures are implemented. The residual effects arising from the Proposed Development are summarised in **Table 7.9** below.

Table 7.9 Summary of Residual Effects

Effect	Receptor (Sensitivity)	Nature of Effect and Geographic Scale	Magnitude of Impact*	Classification of Effect (Statement of Significance BEFORE mitigation)	Mitigation and Monitoring	Residual Effect
Construction Effects						
Increase in employment	Existing construction employment/labour market (Medium)	Short Term Temporary Local and Wider Impact Areas	Minor	Minor Beneficial (Not Significant)	None is required although could be enhanced through the use of local businesses and offering local training/employment initiatives	Minor Beneficial (Not Significant)
Increase in GVA	Local economy (Low)	Short Term Temporary across Local and Wider Impact Areas	Moderate	Minor Beneficial (Not Significant)	None required	Minor Beneficial (Not Significant)
Operational Effects						
Increase in employment	Local labour market (Medium)	Permanent in the Local and Wider Impact Area, as well as National	Minor	Minor Beneficial (Not Significant)	None required	Minor Beneficial (Not Significant)
Increase in GVA	Local economy (Low)	Permanent in the Local Impact Area and Wider Impact Area, as well as National	Minor	Moderate Beneficial (Not Significant)	None required	Moderate Beneficial (Not Significant)

Deprivation	Existing levels of deprivation (High)	Permanent across the Local and Wider Impact Area	Minor to Minor to Moderate	Moderate to Minor Beneficial (Significant)	None required	Minor to Minor to Moderate Beneficial (Significant)

Notes: * incorporating environmental design and management, ** incorporating mitigation and monitoring measures

7.110 No monitoring is proposed to monitor the socio-economic effects of the Proposed Development.

Likely Significant Environmental Effects

7.111 No significant adverse socio-economic effects have been identified.

Summary and Conclusions

7.112 This Chapter has been prepared to assess the likely socio-economic effects of the proposed redevelopment of the existing Cardiff Park and Ride East, Pentwyn to provide a data centre of between 120 MW and 150 MW capacity. The duration, magnitude and receptor sensitivity have been considered in determining the construction and operational effects. The boundary of Cardiff City Council has been identified as an appropriate Local Impact Area, with comparisons to a Wider Impact Area which also includes the local authority areas of The Vale of Glamorgan, Rhondda Cynon Taf, and Caerphilly as a reflection of the primary travel to work area.

7.113 This socio-economic assessment has been prepared to identify any potential effects on the Local and Wider Impact Areas in terms of social infrastructure and local economy arising from the Proposed Development. Where an effect is identified, mitigation measures have been recommended to alleviate any adverse effects or enhance or secure a beneficial effect.

7.114 The assessment is based on the Illustrative Masterplan which shows that the development will provide a bridge across the Rhymney River and improved pedestrian and cycle routes. The development will aid the development of Cardiff as a data centre hub, benefitting from tech industry clustering around the M4 corridor, which, in turn benefits the local economy.

7.115 The construction phase is expected to result in beneficial effects in the short term from the substantial injection of capital into the Cardiff economy and associated employment generated.

7.116 In terms of the operational phase, the Proposed Development is assessed as having a beneficial effect with regards to digital infrastructure, supporting the development of local and UK wide digital industries, with well remunerated on-site roles.

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