Sheffield Hallam University

Seaside Towns in Wales: A 'benchmarking' Study

BEATTY, Christina <http://orcid.org/0000-0003-0943-9979>, FOTHERGILL, Steve and WILSON, Ian <http://orcid.org/0000-0001-8813-3382>

Published version

BEATTY, Christina, FOTHERGILL, Steve and WILSON, Ian (2009). Seaside Towns in Wales: A 'benchmarking' Study. Technical Report. Sheffield Hallam University.

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SEASIDE TOWNS IN WALES:
A 'benchmarking' study

Christina Beatty, Steve Fothergill and Ian Wilson

Centre for Regional Economic and Social Research
Sheffield Hallam University

Report to Visit Wales

The findings in this report are the sole responsibility of the authors and do not necessarily represent the views of Visit Wales or the Welsh Assembly Government

November 2009

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Summary

This report provides a new information base on seaside towns in Wales. It presents a range of statistical evidence on socio-economic conditions and compares the figures with averages for Wales as a whole. The report is directly comparable to two recently completed studies for seaside towns in England and, where possible, makes comparisons between seaside towns in Wales and those in England.

The report is the first of two outputs from new research funded by Visit Wales. The second output, anticipated shortly, is the inclusion of Welsh seaside towns alongside their English counterparts in a study measuring the scale, location and trends in the seaside tourist industry.

The report focuses on 'seaside towns' or 'resorts' – that is, places where seaside tourism is an important part of the local economy – rather than on all places along the coast. The statistics cover 17 seaside towns in Wales with a population ranging from around 1,500 to 66,000. The towns are accurately defined, generally by their built-up area, sometimes bringing together adjacent towns in the same urban area.

The main body of the report is organised into 13 sections, each dealing with a particular topic such as population, benefits or earnings. The key findings are:

Population

- Welsh seaside towns have a combined population of just under 220,000, or just over 7 per cent of the population of Wales as a whole.

- Since 2001 their total population has been growing slightly faster than the average for Wales, though not all seaside towns have shared in this growth.

- The share of the population over state pension age is well above the average for Wales (25 per cent compared to 21 per cent).

- Overall, the proportion of Welsh speakers is close to average but there are big differences between the towns in the West and North West, on the one hand, and North East and South on the other.

Employment, skills and qualifications

- Prior to the recession, employment was growing in Welsh seaside towns – up by 5 per cent in total between 2003/04 and 2006/07.

- Distribution, hotels and restaurants – the main sector where tourist jobs are concentrated – account for 35 per cent of employee jobs in Welsh seaside towns, compared to 23 per cent across Wales as a whole.

- The employment rate is below the average for Wales (68 per cent compared to 71 per cent in 2008) but there are big variations between individual towns.

- Skill levels and occupational mix are broadly comparable to Wales as a whole, though with variation between towns.

Benefits and seasonal unemployment

- The share of adults of working age claiming the three main benefits for the non-employed is above the Wales average – 16.5 per cent compared to 15.6 in November 2008 – and well ahead of the comparable averages for England (13.8 in larger seaside towns, 13.0 in smaller).

- Incapacity benefit claimants are by far the largest group of non-employed working age benefit claimants in Welsh seaside towns.

- There is seasonal unemployment in Welsh seaside towns, but on average the claimant unemployment rate across the towns varies by only 0.4 percentage points between summer and winter.

- A sub-set of smaller seaside towns are more badly affected by seasonal unemployment (eg Barmouth, Pwllheli, New Quay and Tenby)

Earnings and business stock

- Average earnings for both men and women in the districts containing seaside towns are often substantially below the Wales average.

- In relation to population, the stock of VAT registered businesses is high in a number of districts containing seaside towns, but the rate of new registrations is much the same as for Wales as a whole.

Migrant workers

- The districts containing seaside towns have attracted neither greatly more, nor greatly fewer, migrant workers than the average for Wales.

Economic output

- Gross Value Added (GVA) per head in the sub-regions containing seaside towns is almost always below the Wales average.

Housing

- Seaside towns as a whole have a pattern of housing tenure that differs a little from the average for Wales – a below share of households in social housing and higher levels of private renting.

- Housing overcrowding in Welsh seaside towns is generally not widespread.

- But an above average share of households lack key amenities, notably central heating.

Deprivation

- In terms of overall deprivation rankings, seaside towns are split fairly evenly between those above and below the average for Wales.

- This rather mixed pattern is replicated in most of the individual domains within the Indices of Deprivation.

The report concludes that, taking account of a range of evidence, on average Welsh seaside towns are not especially disadvantaged or deprived relative to the rest of Wales.

This conclusion differs from that for England, where seaside towns have been identified as on average more disadvantaged than England as a whole. A crucial difference is that the average for Wales is dragged down by extensive social and economic disadvantage in places such as the Valleys.

In fact, on a substantial range of indicators seaside towns in Wales appear more disadvantaged, on average, than their counterparts in England. The important exception is the trend in employment and benefit numbers, which suggests that prior to the recession Welsh seaside towns were narrowing the gap.

Also, on many indicators there is considerable variation between Welsh seaside towns, with some faring markedly better than others and in quite a number of cases better than Wales as a whole.

On ‘economic’ data the four largest seaside towns in Wales can be placed in the following order (from worst to best) in terms of the strength of their local economy: Rhyl/Prestatyn, Barry, Llandudno/Colwyn Bay/Conwy, Porthcawl.

The same data suggest that, in terms of their local economy, the smaller seaside towns in Wales can be ranked in the following order (again from worst to best): Rhosneigr, Fishguard, Barmouth, Tywyn, Pwllheli, Aberaeron, New Quay, Tenby, Criccieth, Porthmadog, Abersoch, Benllech, Saundersfoot.

1. SCOPE OF THE REPORT

Objectives

The purpose of this report is to provide a new information base on seaside towns in Wales. The report presents a range of statistical evidence on socio-economic conditions in seaside towns, and compares the figures with averages for Wales as a whole.

The report is intended to be directly comparable to two similar, recently completed studies for seaside towns in England[1]. Drawing on this earlier work, the report also includes, where possible, comparisons between seaside towns in Wales and those in England.

The present report is the first of two outputs from new research funded by Visit Wales. The second output, anticipated shortly, is the inclusion of Welsh seaside towns alongside their English counterparts in a study measuring the scale, location and trends in the seaside tourist industry.

The present report covers the key socio-economic issues for which data is reasonably readily available and places information for Welsh seaside towns on the same basis as that which is already available for English seaside towns. The report is not intended, however, to provide a comprehensive digest of all the statistics that might conceivably be assembled for the towns.

Geographical coverage

Like the two English studies, the present report covers 'seaside towns' rather than all places along the coast. What coastal towns all share is an exposure to the sea – which is relevant to issues such as erosion, flood protection and pollution – but in other respects they differ enormously. Some are major industrial and commercial centres on the coast – Cardiff is in this category - very different in character from holiday resorts such as Llandudno, Rhyl or Tenby.

'Seaside towns' (or 'seaside resorts' – these terms are much more interchangeable) are a more clearly identifiable group of places. Because of their history of tourism, and in most cases the continuing significance of this sector, they tend to share a number of features that distinguish them from other places along the coast or inland. This includes a specialist tourist infrastructure (promenades, piers, parks etc), holiday accommodation (hotels, boarding houses, caravan sites) and a distinctive resort character that is often reflected in the built environment. Moreover, while some

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[1] C Beatty, S Fothergill and I Wilson (2008) *England's Seaside Towns: a benchmarking study*, CLG, London.
C Beatty, S Fothergill and I Wilson (2009) *England's Smaller Seaside Towns: a benchmarking study*, report to DEFRA, CRC and CLG.

resorts have fared better than others, they have all to a greater or lesser extent faced challenges arising from the changing structure of the UK holiday trade.

The present benchmarking study therefore covers *seaside towns*, not everywhere along the coast.

There are nevertheless practical problems in accurately identifying and defining seaside towns, especially as there is no hard-and-fast dividing line between these and other towns along the coast. The present study combines two groups of places.

The first are the principal seaside resorts in Wales identified in the 2003 report *The Seaside Economy*[2], which is widely recognised as the starting point for much contemporary research on seaside towns. The *Seaside Economy* report identified 43 principal seaside towns around the coast of Britain, each with a population of at least 10,000, of which four are in Wales:

Barry
Llandudno/Colwyn Bay/Conwy
Porthcawl
Rhyl/Prestatyn

Two of the four are in practice amalgams of neighbouring towns that make up a largely continuous built-up urban area. *The Seaside Economy* report adopted this approach because in labour market terms it does not make sense to disentangle their component parts: jobs in Llandudno, for example, will often be held by residents of Conwy and Colwyn Bay, and retail spending will often spill over from one part of the area to another. The present report retains this approach[3].

The second group of towns covered by the study are 13 smaller seaside towns, each with a population below 10,000, identified specifically for the present report:

Aberaeron
Abersoch
Barmouth
Benllech
Criccieth
Fishguard
New Quay
Porthmadog
Pwellheli
Rhosneigr
Saundersfoot
Tenby
Tywyn

In identifying this list of smaller seaside towns, the research team was guided by a range of information, notably the *AA Book of the Seaside*[4], which though somewhat

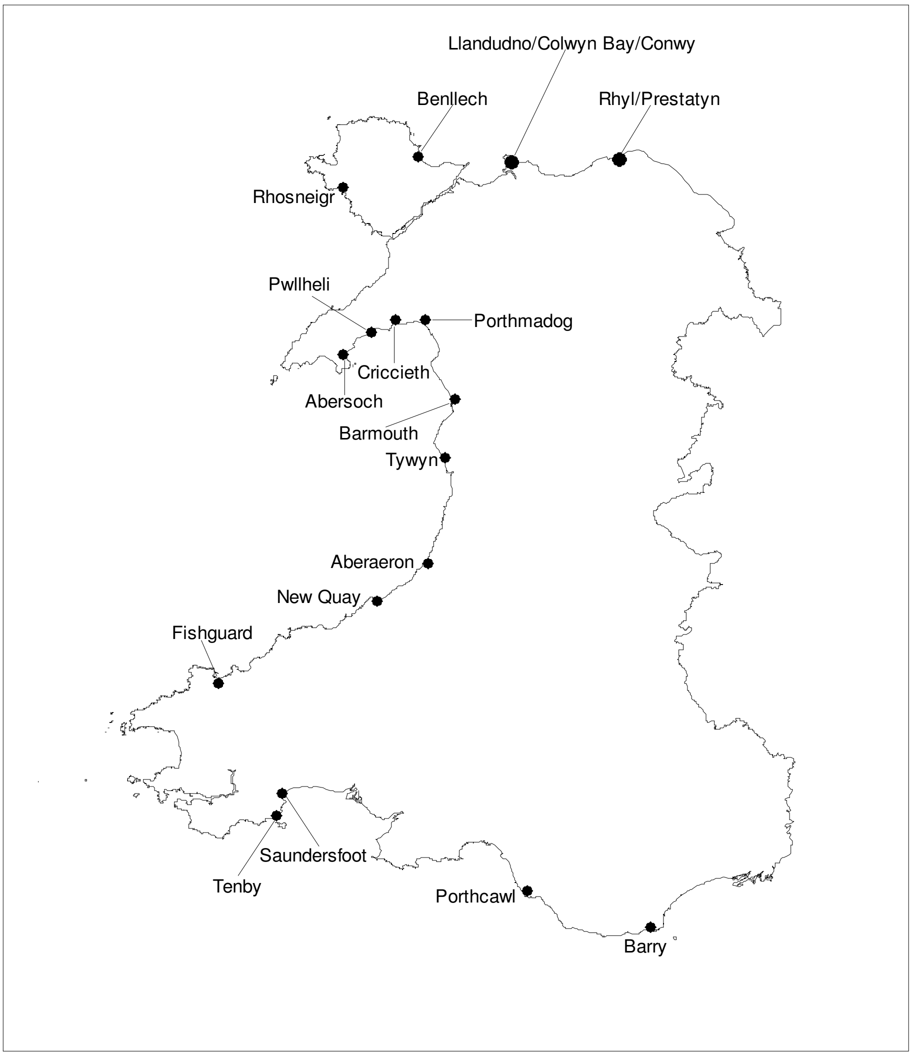
[2]C Beatty and S Fothergill (2003) *The Seaside Economy*, final report of the seaside towns research project, CRESR, Sheffield Hallam University.
[3] Disentangling the component parts of Llandudno/Colwyn Bay/Conwy and of Rhyl/Prestatyn would make sense for some indicators and is technically possible, but was beyond the scope of the present study. The approach adopted here also maintains comparability with the equivalent studies of English seaside towns.
[4] Automobile Association (1972) *AA Book of the Seaside*, Drive Publications, London.

dated provides an unrivalled, consistent and detailed description of virtually everywhere along the coastline of Great Britain. The mapping exercise was also informed by careful scrutiny of Ordnance Survey maps of the coastline and by first-hand knowledge.

In all, 17 Welsh seaside towns are therefore included in the present study. The location of the towns is shown in Figure 1.

For each seaside town covered in the present report, the boundaries of the built-up urban area are accurately defined at Lower Super Output Area (LSOA) level. LSOAs are standard statistical units below ward level, and the smallest unit for which a reasonable range of contemporary socio-economic data is available[5]. A typical LSOA covers around 1,500 residents. This effectively sets a lower size threshold below which smaller seaside towns cannot be separately identified for statistical purposes. The present study therefore covers seaside towns with a population of at least 1,500[6].

Figure 1: Welsh Seaside Towns



[5] The only figures for smaller units are Output Area data from the 2001 Census of Population.
[6] The precise lower size cut-off depends on LSOA boundaries. New Quay actually falls just below the 1,500 threshold but can be included because of the way that LSOA boundaries are drawn.

The 17 towns included here will account for the majority of the seaside tourist industry in Wales. Additional seaside tourism will be found in places below the 1,500 population cut-off and in some urban areas along the coast (for example Aberavon in Port Talbot). In addition to the 17 towns covered in the present report, the forthcoming study of seaside tourism includes The Mumbles (part of Swansea), Aberystwyth (first and foremost a commercial and university town rather than a resort), and Borth, Harlech and St David's (not themselves 'seaside resorts' but meriting inclusion because of local camping and caravan parks).

Presentation of data

In most of the tables in the report, the statistics are presented in the following order:

- *Welsh seaside towns*
  (The average for the 17 towns)

- *Wales*
  (The equivalent average for the whole of Wales)

- *England's principal seaside towns*[7]
  (The average for English seaside towns with a population of at least 10,000)

- *England's smaller seaside towns*[8]
  (The average for English seaside towns with a population between 1,500 and 10,000)

- *England*
  (The equivalent average for the whole of England)

- *Figures for each of the 17 Welsh seaside towns*

[7] These are, in descending order of size: Greater Bournemouth, Greater Brighton, Greater Blackpool, Greater Worthing, Southend-on-Sea, Isle of Wight, Torbay, Hastings/Bexhill, Thanet, Eastbourne, Southport, Weston-super-Mare, Whitstable/Herne Bay, Lowestoft, Folkestone/Hythe, Great Yarmouth, Clacton, Scarborough, Weymouth, Morecambe/Heysham, Bognor Regis, Bridlington, Whitley Bay, Exmouth, Dawlish/Teignmouth, Deal, Newquay, Penzance, Falmouth, Skegness, Burnham-on-Sea, Sidmouth, Whitby, Minehead, Ilfracombe, St Ives, Swanage.

[8] These are, in descending order of size: Mablethorpe, Sherringham, Hornsea, Bude, Cromer, Withernsea, Seaton, West Mersea, Filey, Amble, Dymchurch/St Mary's Bay, Saltburn by the Sea, Dartmouth, East Wittering, Budleigh Salterton, Sutton-on-Sea, Hunstanton, Grange over Sands, Westward Ho, Looe, Padstow, Watchet, Lyme Regis, Chapel St Leonards, Aldeburgh, Silloth, Wells next the Sea, Perranporth, Mundesley, Arnside, Seahouses, Mevagissey, Lynton/Lynmouth, Fowey, Salcombe, Portreath, Southwold.

3. STATISTICAL EVIDENCE

3.1 Population

Table 1 shows the population of each of the 17 Welsh seaside towns in 2007 (the most recent year for which figures are currently available).

Table 2 shows the population change in these towns between 2001 and 2007. The figures are the ONS mid-year population estimates and can be subject to error and revision.

Table 3 shows the age structure of the seaside town population in 2007, differentiating between three groups – the under 16s, those of working age, and those over state pension age (60 for women, 65 for men).

Key points

- The 17 Welsh seaside towns covered by this report have a combined population of just under 220,000. This represents 7.3 per cent of the total population of Wales of just under 3 million.

- Welsh seaside towns vary a lot in size. The largest (Llandudno/ Colwyn Bay, Conwy) accounts for 30 per cent of the total population. The four largest seaside towns account for 80 per cent. The remaining 13, all with a population below 10,000, account for just 20 per cent.

- Welsh seaside towns have a growing population. Over the 2001-07 period their population grew by 3 per cent – the same as in England's seaside towns but slightly faster than the 2 per cent population growth in Wales as a whole.

- Not all Welsh seaside towns have shared in population growth since 2001. Six mainly smaller seaside towns have experienced a modest decline in population, but the absolute numbers are small. Also, since the figures for 2007 are estimates they may be subject to revision at a later date, notably as a result of the 2011 Census.

- Barry accounts for almost half the estimated growth in seaside town population in Wales between 2001 and 2007 – a reflection perhaps of the town's role as a commuter settlement for Cardiff.

- The seaside town population in Wales is skewed towards older age groups. The share of the population over state pension age is 4 percentage points higher than the average for Wales (25 per cent compared to 21 per cent). Seaside towns in Wales share this feature with their counterparts in England.

- The share of the population of working age in seaside towns is correspondingly lower – 56 per cent compared to 60 per cent for Wales as a whole.

- Barry is a notable exception – its population structure is actually slightly younger than the average for Wales as a whole, a reflection again, perhaps, of the town's relationship to Cardiff.

Table 1: Population, 2007

	Population
Welsh seaside towns	**218,800**
Wales	**2,980,000**
English principal seaside towns	2,895,800
English smaller seaside towns	169,800
England	51,092,000
Llandudno/Colwyn Bay/Conwy	66,500
Barry	50,500
Rhyl/Prestatyn	45,200
Porthcawl	15,700
Tenby	6,400
Pwllheli	5,300
Fishguard	5,100
Porthmadog	3,500
Benllech	3,500
Tywyn	3,300
Saundersfoot	2,800
Barmouth	2,500
Rhosneigr	2,200
Criccieth	1,800
Abersoch	1,700
Aberaeron	1,500
New Quay	1,300

Source: ONS mid-year population estimates

Table 2: Population growth, 2001-2007

	no.	**%**
Welsh seaside towns	**5,590**	**3**
Wales	**69,800**	**2**
English principal seaside towns	70,750	3
English smaller seaside towns	5,160	3
England	1,642,300	3
New Quay	140	13
Barry	2,620	5
Rhyl/Prestatyn	1,850	4
Barmouth	80	3
Benllech	80	2
Llandudno/Colwyn Bay/Conwy	1,280	2
Tywyn	50	1
Fishguard	50	1
Porthmadog	20	1
Pwllheli	30	1
Saundersfoot	-10	0
Criccieth	-20	-1
Porthcawl	-160	-1
Tenby	-110	-2
Rhosneigr	-70	-3
Aberaeron	-50	-4
Abersoch	-180	-10

Source: ONS mid-year population estimates

Table 3: Age distribution of population, 2007
(ranked by share of population aged 60/65+)

	% of total population		
	0-15	**16-59/64**	**60/65+**
Welsh seaside towns	**18**	**56**	**25**
Wales	**19**	**60**	**21**
English principal seaside towns	17	58	25
English smaller seaside towns	14	52	34
England	19	62	19
Abersoch	13	48	39
Benllech	13	51	36
Aberaeron	14	51	36
Tywyn	15	50	35
Criccieth	16	51	33
Saundersfoot	15	53	31
Porthcawl	15	54	30
Rhosneigr	15	55	30
Porthmadog	17	54	29
New Quay	16	55	29
Tenby	16	55	29
Fishguard	19	53	28
Llandudno/Colwyn Bay/Conwy	17	55	27
Rhyl/Prestatyn	19	56	25
Pwllheli	18	57	25
Barmouth	16	60	24
Barry	22	61	18

Source: ONS mid-year population estimates

3.2 Language

Table 4 shows the share of residents aged 3+ who speak Welsh. This is of course a variable for which there is no relevant comparison with England. The figures are from the 2001 Census, and though this is now some while ago the basic geography is unlikely to have changed very much.

Key points

- Only fractionally more residents of seaside towns speak Welsh than is the case across Wales as a whole – 23 per cent compared to 21 per cent in the whole of Wales.
- There are however large and predictable differences. The seaside towns in the west and north west of Wales have a much higher proportion of Welsh speakers than those along the south coast and north east Wales.
- All the smaller seaside towns in Wales, with the exception of Saundersfoot and Tenby in the south, have a very substantial proportion of Welsh speakers.

Table 4: Welsh speaking residents, 2001

	%
Pwllheli	79
Porthmadog	75
Criccieth	65
Aberaeron	64
Rhosneigr	58
Abersoch	51
Benllech	49
New Quay	48
Barmouth	44
Tywyn	40
Fishguard	37
Llandudno/Colwyn Bay/Conwy	24
Rhyl/Prestatyn	16
Tenby	11
Barry	11
Saundersfoot	10
Porthcawl	10
Welsh seaside towns	**23**
Wales	**21**

Source: Census of Population

3.3 Employment

Table 5 shows the employment in seaside towns in 2006. Two figures are presented here. The first is the number of employee jobs recorded by the government's Annual Business Inquiry (ABI). The second is an estimate of the total number of people in work in the towns, adding in the self-employed excluded from the ABI and deducting 'double jobbing' (where employees are counted more than once by the ABI). To derive these estimates the 2006 ABI figures have been adjusted upwards by the ratio between the number of self-employed and employees in each town, from the 2001 Census of Population, and downwards by the proportion of double-jobbers from Labour Force Survey data for GB for 2001.

Table 6 shows the change in the number of employee jobs in each town between 2003-04 and 2006-07. In the case of the smaller seaside towns, data is not available at a sufficiently fine scale to allow comparison with earlier years. In addition, the ABI data for small areas can show erratic fluctuations from year to year, which to some extent reflect sampling errors. To help offset these fluctuations, the employment figures here are based on a comparison between two-year averages. Nevertheless, the figures for a number of smaller seaside towns, notably New Quay and Aberaeron, show unusually large percentage increases in employment that must be treated with caution. The large percentage fall in employment recorded in Tywyn may likewise be a statistical aberration. The figures for Welsh seaside towns as a whole will be more reliable, with errors in the data for individual small towns tending to cancel out.

Table 7 shows the structure of employment in 2007, from the ABI. Employment is broken down into eight sectors[9] and the figures refer to the jobs located in the towns, not those held by residents, which will differ because of commuting. The figures are ranked by the share of employment in 'distribution, hotels and restaurants'. This is the sector where many tourist-related jobs are concentrated and the ranking of the towns therefore offers a rough guide to the extent to which local employment depends on tourism.

Key points

- In all, more than 80,000 jobs are located in Welsh seaside towns.
- The three largest seaside towns account for around 70 per cent of the total.
- Over this period, employment in Welsh seaside towns grew fractionally faster than the average for Wales and somewhat faster than in England's principal seaside towns.
- There are apparently large differences in employment trends between individual towns, but bearing in mind the sampling errors in the ABI it would be wrong to place too much emphasis on some of the figures.

[9] Agriculture and fishing, and energy and water, have been merged in these tables. There is little employment recorded in either of these groups in seaside towns.

- The share of jobs in distribution, hotels and restaurants is markedly higher in Welsh seaside towns than in Wales as a whole - 35 per cent (representing around 29,000 jobs) compared to an average of 23 per cent.

- The proportion of jobs in distribution, hotels and restaurants in smaller seaside towns is generally higher than in their larger counterparts. This is a feature that is evident in England as well as Wales, and is a reflection of the greater dependence of smaller seaside towns on the tourist sector.

- Manufacturing and banking, finance, insurance and business services are poorly represented in most Welsh seaside towns.

Table 5: Employment, 2007

	Employee jobs	Estimated total employment
Welsh seaside towns	**71,600**	**82,000**
Wales	**1,186,600**	**1,317,000**
English principal seaside towns	1,081,900	1,232,000
English smaller seaside towns	45,000	56,000
England	23,004,900	25,456,000
Llandudno/Colwyn Bay/Conwy	26,000	29,900
Rhyl/Prestatyn	12,700	14,100
Barry	13,000	13,700
Porthcawl	4,000	4,600
Tenby	3,200	4,100
Pwllheli	2,600	3,000
Porthmadog	2,300	2,800
Fishguard	1,700	2,100
Aberaeron	1,500	1,900
Tywyn	900	1,200
Barmouth	700	1,000
Saundersfoot	700	900
Abersoch	600	800
Criccieth	500	700
Benllech	500	600
New Quay	400	500
Rhosneigr	200	300

Sources: Annual Business Inquiry, Census of Population, authors' estimates

Table 6: Growth in employment, 2003/04 to 2006/07

	no.	%
Welsh seaside towns	**3,300**	**5**
Wales	**45,900**	**4**
English principal seaside towns	20,400	2
English smaller seaside towns	2,100	5
England	471,500	2
New Quay	140	55
Aberaeron	380	36
Saundersfoot	140	25
Tenby	580	22
Porthcawl	700	22
Abersoch	90	17
Benllech	60	15
Fishguard	190	13
Rhosneigr	30	12
Barry	1,220	10
Porthmadog	120	6
Criccieth	20	3
Rhyl/Prestatyn	270	2
Barmouth	-10	-1
Llandudno/Colwyn Bay/Conwy	-450	-2
Pwllheli	-80	-3
Tywyn	-160	-15

Source: Annual Business Inquiry

Table 7: Employment by sector, 2007
(ranked by share in Distribution, hotels and restaurants)

	% of all employee jobs							
	Agri., energy	**Manufact.**	**Construc.**	**Dist., hotels rests.**	**Trans & comm.**	**Banking etc**	**Public admin etc**	**Other services**
Welsh seaside towns	**1**	**6**	**5**	**35**	**4**	**10**	**33**	**6**
Wales	**2**	**14**	**5**	**23**	**4**	**14**	**33**	**5**
English Principal Seaside	1	7	4	29	4	17	33	6
English Small Seaside Towns	1	7	5	41	3	10	27	6
England	1	11	5	23	6	22	26	5
New Quay	2	5	1	68	1	3	16	4
Barmouth	0	2	3	61	2	7	18	5
Saundersfoot	0	0	4	52	2	13	21	7
Abersoch	0	3	9	51	4	7	20	5
Benllech	1	4	9	51	2	8	17	8
Tenby	0	3	3	50	3	6	23	10
Porthmadog	1	5	4	49	3	10	18	11
Criccieth	0	2	7	43	1	22	18	6
Pwllheli	1	13	4	41	4	9	21	8
Porthcawl	1	2	3	39	2	15	29	8
Rhosneigr	1	4	14	38	0	13	23	6
Llandudno Colywyn Bay Conwy	1	3	4	38	4	11	35	5
Fishguard	0	2	5	30	18	9	28	7
Rhyl and Prestatyn	0	5	6	30	3	12	36	8
Tywyn	0	18	4	29	7	5	31	6
Aberaeron	0	2	2	26	0	5	62	3
Barry	0	16	7	24	5	7	36	4

Source: Annual Business Inquiry

3.4 Economic status

Table 8 shows the share of the working age population in employment (including self-employment). The figures for each seaside town are estimates based on the employment rate in the town in the 2001 Census, adjusted by the percentage point change between 2001 and 2008 in the relevant local authority district from the Labour Force Survey (LFS). The figures for Wales as a whole (and for England as a whole) are directly from the LFS.

The remaining working age population in each district will be either unemployed or economically inactive. The LFS data is insufficiently reliable at the local scale to allow either of these categories to be separately identified.

Table 9 shows the occupational breakdown of residents in employment in 2001, from the Census. The figures here are grouped into four broad categories and ranked according to the share in managerial and professional occupations. The LFS data for local areas is insufficiently robust to allow these figures to be reliably up-dated.

Key points

- The average employment rate in Welsh seaside towns is below the Wales average – 68 per cent compared to 71 per cent. The average employment rate in Wales, in turn, is below the equivalent figure for England (74 per cent).

- On average, seaside towns in Wales have a lower employment rate than seaside towns in England.

- There is substantial variation in the estimated employment rate between seaside towns – from 73 per cent in Tenby and Porthmadog to just 61 per cent in Aberaeron. Among the larger seaside towns, Llandudno/Colwyn Bay/Conwy (71 per cent) has a markedly higher employment rate than Rhyl/Prestatyn (63 per cent).

- The occupational structure in Welsh seaside towns is very similar to Wales as a whole, and to English seaside resorts.

- There is however variation between individual towns. A number of smaller seaside towns in West Wales have a notably higher proportion of managers and professionals than, for example, Barry or Rhyl/Prestatyn.

Table 8: Estimated employment rate, 2008

	% of working age
Welsh seaside towns	**68**
Wales	**71**
English principal seaside towns	72
English smaller seaside towns	70
England	74
Tenby	73
Porthmadog	73
Tywyn	72
Llandudno/Colwyn Bay/Conwy	71
Barry	70
Fishguard	69
Pwllheli	68
Criccieth	68
Abersoch	66
Saundersfoot	66
Porthcawl	66
Benllech	65
Barmouth	65
Rhosneigr	64
Rhyl/Prestatyn	63
New Quay	62
Aberaeron	61

Source: Census of Population, Labour Force Survey, ONS mid-year population estimates

Table 9: Occupation of residents in employment, 2001
(ranked by share of managers and professionals)

	% of workforce			
	Managers and professional	**Other white collar**	**Skilled manual**	**Other manual**
Welsh seaside towns	**23**	**24**	**13**	**40**
Wales	**23**	**25**	**13**	**39**
English principal seaside towns	24	26	12	37
English smaller seaside towns	24	21	16	39
England	26	27	12	35
Abersoch	34	24	16	27
Aberaeron	33	24	15	28
New Quay	33	20	16	32
Porthcawl	32	27	11	30
Criccieth	31	16	18	35
Tenby	29	19	15	37
Benllech	28	26	18	28
Saundersfoot	28	19	18	35
Barmouth	26	12	17	44
Llandudno/Colwyn Bay/Conwy	25	22	13	40
Porthmadog	24	21	15	39
Rhosneigr	23	22	19	36
Tywyn	21	13	18	47
Pwllheli	20	20	17	43
Rhyl/Prestatyn	19	23	13	44
Fishguard	19	20	16	45
Barry	19	28	13	40

Source: Census of Population

3.5 Skills and qualifications

Table 10 shows the highest qualifications of the working age population. These figures are taken from the 2001 Census. The Labour Force Survey data for small areas is insufficiently robust to allow reliable up-dating. The qualifications are grouped into standard 'levels':

Level 4/5	Degree or equivalent
Level 3	A levels, NVQ level 3 or equivalent
Level 2	5 O levels or good GCSEs, NVQ level 2 or equivalent
Level 1	Less than 5 O levels, good GCSEs or equivalent, NVQ level 1

Key points

- Across Welsh seaside towns as a whole, the level of qualifications of the workforce is not fundamentally different to the Welsh average.

- Qualification levels in Welsh seaside towns as a whole also differ little from the average in English seaside towns.

- A number of Welsh seaside towns – including Barry and Rhyl/Prestatyn among the larger places – do however have a notably low proportion of workers with high-level qualifications.

Table 10: Highest qualifications of working age population, 2001 (ranked by share with Level 4/5)

	as % of working age					
	No qualifications	**Level 1**	**Level 2**	**Level 3**	**Level 4/5**	**Other**
Welsh seaside towns	**26**	**19**	**24**	**7**	**16**	**8**
Wales	**27**	**18**	**22**	**8**	**18**	**7**
English principal seaside towns	23	21	23	9	17	7
English smaller seaside towns	26	20	22	7	15	9
England	23	19	21	9	21	7
Porthcawl	22	17	22	8	24	8
New Quay	18	18	27	6	24	7
Aberaeron	21	14	23	10	23	8
Abersoch	24	15	26	7	21	7
Benllech	21	16	24	8	21	9
Tenby	23	19	24	8	19	7
Saundersfoot	24	19	24	7	19	8
Criccieth	23	17	29	6	19	8
Llandudno/Colwyn Bay/Conwy	24	18	24	8	18	7
Porthmadog	25	19	25	6	17	8
Pwllheli	27	18	25	7	17	6
Rhosneigr	28	19	22	7	16	8
Fishguard	27	19	25	6	16	8
Barmouth	28	19	25	7	13	8
Barry	28	20	23	7	13	9
Rhyl/Prestatyn	29	21	24	6	12	8
Tywyn	30	19	26	5	12	8

Source: Census of Population

3.5 Benefits

Table 11 shows the percentage of the working age population claiming each of the three main benefits for the non-employed – Jobseeker's Allowance (JSA)[10], Income Support (IS) paid to lone parents[11], and Incapacity Benefit / Severe Disablement Allowance (IB/SDA)[12]. These three benefits are mutually exclusive (ie an individual claimant cannot receive more than one at the same time) so there is no double-counting. Seaside towns are ranked by the total claimant rate of the three benefits.

These benefit figures, which are for November 2008[13], mostly exclude the impact of recession. The main impact of recession across Britain as a whole has so far been to increase JSA claimant numbers.

Table 12 shows the percentage point change in the claimant rate of each of these three working-age benefits between August 1999 and November 2008. The seaside towns are ranked by the percentage point increase/decrease.

Table 13 shows the share of persons over state pension age (60 for women, 65 for men) claiming pension credits. Although take-up of pension credits is less than comprehensive, this is a useful guide to the distribution of pensioners living on low incomes.

Table 14 shows the share of households claiming Housing Benefit and/or Council tax Benefit. The figures here are from a one-off dataset compiled at LSOA level for August 2005. Since both benefits are means-tested, this is a good indicator of low-income households.

Key points

- Across Welsh seaside towns as a whole the share of working age adults claiming the three main benefits for the non-employed (16.5 per cent) is above the average for Wales (15.6 per cent), which in turn is above the averages for English seaside towns and for England as a whole (just 11.4 per cent).

- Incapacity claimants are by far the largest group of non-employed working age claimants. In Welsh seaside towns they account for more than one-in-ten of all adults aged between 16 and state pension age.

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[10] Because of the way records are held the figures for JSA claimants differ very marginally from the claimant count unemployment figures.

[11] In October 2009 Income Support was restricted to lone parents with a youngest child below the age of 10 (from 12 previously, and 16 to October 2008). The threshold is being lowered again to 7 in October 2010. This will lower Income Support numbers.

[12] The IB/SDA figures include claimants who fail to qualify for IB itself because of a poor National Insurance (NI) record and instead mostly receive IS with a disability premium. The Department for Work and Pensions (DWP) counts these as IB claimants and includes them in the headline figures. Severe Disablement Allowance is an incapacity benefit that is closed to new claimants. In October 2008, Employment and Support Allowance replaced IB for new claimants. The change is too recent to be reflected here.

[13] At the time of writing, November 2008 was the most recent date for which fully comparable data for small areas was available.

- The very high incapacity benefit claimant rate in Welsh seaside towns is actually no higher than in Wales as a whole – but it is worth bearing in mind that Wales has the highest IB claimant rate of any GB region.

- There are important variations between seaside towns. The overall claimant rate in Rhyl/Prestatyn is more than double the rate in small seaside towns such as Criccieth, Saundersfoot and Abersoch.

- In Welsh seaside towns as a whole the share of working age residents claiming the three main non-employed benefits fell by just over 2 percentage points between 1999 and 2008 – a little less than in Wales as a whole, but more than in English seaside towns.

- All Welsh seaside towns have shared in this reduction in claimant numbers, but the scale of the reduction has varied considerably.

- Around a quarter of seaside town residents over 60/65 draw on pension credits – much the same as the average for Wales – but there are important differences between individual towns.

- Rhyl/Prestatyn and Barry have particularly high Pension Credit claimant rates – both around 30 per cent.

- The share of households claiming Housing Benefit and/or Council Tax Benefit is close to the average for Wales, but Rhyl/Prestatyn and Barry again stand out as having a high proportion of disadvantaged households.

Table 11: Working age claimant rates, November 2008 (ranked by total)

	as % of working age			
	JSA	IS as lone parent	IB/SDA	Total
Welsh seaside towns	**3.7**	**2.2**	**10.5**	**16.5**
Wales	**3.1**	**2.0**	**10.5**	**15.6**
English principal seaside towns	3.1	2.1	8.5	13.8
English smaller seaside towns	2.9	1.5	8.7	13.0
England	2.8	2.0	6.6	11.4
Rhyl/Prestatyn	4.9	2.7	13.3	21.0
Barry	4.4	3.0	10.7	18.0
Rhosneigr	4.5	1.2	11.5	17.2
Fishguard	3.0	2.6	11.1	16.6
Porthcawl	2.4	1.2	11.3	14.8
Llandudno/Colwyn Bay/Conwy	3.3	1.9	9.5	14.7
Barmouth	5.0	1.7	7.9	14.5
Tywyn	2.2	1.9	9.3	13.3
Pwllheli	2.3	1.5	9.4	13.3
Aberaeron	1.4	0.7	10.8	12.8
New Quay	2.2	1.4	8.7	12.3
Tenby	1.8	1.5	8.3	11.7
Porthmadog	2.9	0.5	7.4	10.8
Benllech	2.5	0.8	7.0	10.4
Abersoch	1.8	0.6	7.3	9.7
Saundersfoot	2.0	0.7	6.7	9.4
Criccieth	2.7	0.5	6.0	9.2

Source: DWP

Table 12: Change in working age claimant rates, August 1999-November 2008 (ranked by total)

	as % of working age			
	JSA	**IS as lone parent**	**IB/SDA**	**Total**
Welsh seaside towns	**-0.1**	**-1.0**	**-1.0**	**-2.1**
Wales	**-0.4**	**-0.8**	**-2.0**	**-3.2**
English principal seaside towns	-0.7	0.4	-0.7	0.0
English smaller seaside towns	-0.6	0.0	-1.0	0.0
England	-0.3	-0.5	-0.2	-1.0
Barry	0.6	-1.5	0.7	-0.3
Rhyl/Prestatyn	0.8	-0.9	-1.1	-1.2
Porthmadog	-1.3	-0.5	0.0	-1.8
Fishguard	-0.9	0.2	-1.5	-2.2
Llandudno/Colwyn Bay/Conwy	-0.4	-0.7	-1.1	-2.2
Tywyn	-2.5	-0.3	0.0	-2.8
New Quay	0.0	-0.7	-2.2	-2.9
Pwllheli	-1.0	-0.3	-2.0	-3.3
Barmouth	-0.3	-1.7	-2.0	-4.0
Tenby	-2.0	-1.1	-1.5	-4.6
Saundersfoot	-0.3	-1.3	-3.0	-4.7
Aberaeron	-2.0	-0.7	-2.0	-4.7
Criccieth	-1.6	-1.1	-2.2	-4.9
Porthcawl	-0.7	-0.9	-3.8	-5.4
Abersoch	0.0	-0.6	-4.9	-5.5
Benllech	-2.0	-0.6	-4.8	-7.3
Rhosneigr	-2.0	-2.0	-3.3	-7.4

Source: DWP

Table 13: Pension Credits claimant rate, November 2008

	% of persons aged over 60/65
Welsh seaside towns	**25.6**
Wales	**26.1**
English principal seaside towns	23.8
English smaller seaside towns	20.3
England	23.7
Rhyl/Prestatyn	31.8
Barry	29.7
Pwllheli	28.1
Tywyn	26.9
Barmouth	26.1
Rhosneigr	25.7
Tenby	25.0
Llandudno/Colwyn Bay/Conwy	23.0
Fishguard	22.0
Porthmadog	21.1
Porthcawl	20.8
New Quay	20.6
Abersoch	19.9
Aberaeron	19.3
Saundersfoot	17.9
Benllech	16.6
Criccieth	15.8

Sources: DWP, ONS

Table 14: Households claiming Housing Benefit and/or Council Tax Benefit, August 2005

	%
Welsh seaside towns	**25**
Wales	**24**
English smaller seaside towns	22
English principal seaside towns	24
England	22
Rhyl/Prestatyn	31
Barry	29
Barmouth	27
Rhosneigr	25
Pwllheli	23
Tywyn	23
Llandudno/Colwyn Bay/Conwy	22
Fishguard	22
Porthcawl	21
New Quay	21
Tenby	21
Abersoch	19
Aberaeron	18
Saundersfoot	17
Benllech	17
Criccieth	14
Porthmadog	13

Source: DWP, Census

3.6 Seasonal unemployment

Table 15 shows the average annual fluctuation in the claimant unemployment rate[14] between January and July in each seaside town, over the period 2005-08[15]. The towns are ranked according to the scale of the seasonal fluctuation.

Key points

- There is a seasonal cycle in claimant unemployment in Welsh seaside towns but on average this is not large – just 0.4 percentage points.

- Several smaller seaside towns do however experience substantially larger seasonal fluctuation in employment. This is something that also characterises smaller seaside towns in England, and no doubt reflects the greater dependence of their local economy on seasonal tourism.

- The Llandudno/Colwyn Bay/Conwy area shows the smallest seasonal fluctuations in claimant unemployment.

[14] Using the 2007 working age population as the denominator.
[15] Data on claimant unemployment is available for 2009 but the sharp rise in the first half of the year, associated with the impact of recession, distorts the measurement of seasonal fluctuations.

Table 15: Average seasonal fluctuation in claimant unemployment, 2005-2008

	Percentage points
Welsh seaside towns	**0.4**
Wales	**0.1**
English principal seaside towns	0.3
English smaller seaside towns	0.7
England	0.0
Barmouth	1.6
Pwllheli	1.5
New Quay	1.4
Tenby	1.4
Criccieth	1.1
Abersoch	1.0
Saundersfoot	0.8
Tywyn	0.8
Aberaeron	0.7
Porthmadog	0.7
Rhosneigr	0.7
Porthcawl	0.5
Fishguard	0.5
Rhyl/Prestatyn	0.3
Barry	0.3
Benllech	0.2
Llandudno/Colwyn Bay/Conwy	0.1

Sources: DWP, ONS

3.7 Earnings

Table 16 provides a guide to the median hourly earnings of men and women in Welsh seaside towns in 2008.

In the absence of finer-grain data, these figures are for the district containing the seaside town and they refer to the earnings of residents, not the jobs located in the town. Commuting flows mean that the earnings from employment in the town itself will in some cases differ substantially. District-level figures nevertheless provide a good guide to earnings in the wider local labour market.

Key points

- Hourly earnings in the districts covering Welsh seaside towns are on average only a little below the average for Wales, for both men and women.
- The average for Welsh seaside towns is however inflated by the figures for the Vale of Glamorgan, which covers Barry, where commuters to Cardiff boost average earnings levels.
- Putting aside Barry, only one other seaside town – Porthcawl – is in a district where male earnings are above the Wales average.
- The vast majority of seaside towns in Wales are located in districts where earnings are below the average for Wales, sometime substantially.
- Additionally, earnings in Wales are below the average in England.

Table 16: Median hourly earnings, 2008 (district data)

	Male		Female
Welsh seaside towns	**11.06**	**Welsh seaside towns**	**8.55**
Wales	**11.11**	**Wales**	**8.66**
English principal seaside	11.38	English principal seaside	8.75
English smaller seaside	10.78	English smaller seaside	8.18
England	12.29	England	9.35
Barry	13.20	Barry	9.32
Porthcawl	11.83	Rhosneigr	8.56
Rhosneigr	11.04	Benllech	8.56
Benllech	11.04	Llandudno/Colwyn/Conwy	8.55
Rhyl/Prestatyn	10.53	New Quay	8.34
Llandudno/Colwyn/Conwy	10.27	Aberaeron	8.34
Pwllheli	9.89	Pwllheli	8.32
Abersoch	9.89	Abersoch	8.32
Tywyn	9.89	Tywyn	8.32
Barmouth	9.89	Barmouth	8.32
Porthmadog	9.89	Porthmadog	8.32
Criccieth	9.89	Criccieth	8.32
New Quay	9.76	Porthcawl	8.16
Aberaeron	9.76	Rhyl/Prestatyn	8.06
Saundersfoot	9.31	Saundersfoot	7.70
Tenby	9.31	Tenby	7.70
Fishguard	9.31	Fishguard	7.70

NB: Figures refer to districts covering seaside towns
Source: Annual Survey of Hours and Earnings

3.8 Business stock

Table 17 shows the number of VAT registered businesses (per 10,000 residents) in the districts covering seaside towns in 2007 and the number of new VAT registrations (again per 10,000 residents) in that year.

These are indicators of the scale of entrepreneurial activity. The figures exclude very small businesses below the VAT threshold. The nature of some of the businesses serving the seaside tourist industry (small B&Bs, kiosks etc) would suggest that these excluded businesses below the VAT threshold may be quite numerous in seaside towns. Some towns may be affected more than others by this exclusion.

Since the figures are for districts, they offer a guide to the local business environment rather than an accurate picture for the towns themselves.

Key points

- In relation to population, the stock of VAT registered businesses in the districts covering Welsh seaside towns is a little above the average for Wales, though slightly below the average for England.

- There are sizeable variations within Wales. Most smaller seaside towns are in districts with a high business stock (in relation to population), a pattern also found in England.

- The rate of new VAT registrations in the districts covering Welsh seaside towns is the same as the average for Wales, but distinctly lower than the equivalent figure for English seaside towns.

- Although there are differences in the rate of new VAT registrations, all bar a few towns fall into a fairly narrow range.

Table 17: VAT registered businesses, 2007 (district data) (ranked by stock per 10,000 residents)

	Stock of VAT registered businesses per 10,000 residents	New VAT registrations in 2007 per 10,000 residents
Welsh seaside towns	**326**	**23**
Wales	**293**	**23**
English principal seaside towns	305	29
English smaller seaside towns	396	29
England	340	35
New Quay	508	24
Aberaeron	508	24
Saundersfoot	450	27
Tenby	450	27
Fishguard	450	27
Pwllheli	421	25
Abersoch	421	25
Tywyn	421	25
Barmouth	421	25
Porthmadog	421	25
Criccieth	421	25
Llandudno/Colwyn Bay/Conwy	340	22
Rhosneigr	336	22
Benllech	336	22
Rhyl/Prestatyn	329	25
Barry	255	22
Porthcawl	226	21

NB: Figures refer to districts covering seaside towns
Source: DBERR

3.9 Migrant workers

Table 18 shows the total number of new National Insurance registrations by non-UK nationals in 2005/6, 2006/7 and 2007/8 in each of the districts that cover Welsh seaside towns. The table also expresses these numbers as a percentage of the working age population[16] in the district.

These figures record where migrant workers were living at the time they first registered. They do not necessarily reflect where they are still living, or even whether they remain in the UK. At the present time, however, they are the only systematic local figures available on migrant workers.

Ward-level figures are not available to allow the seaside towns themselves to be distinguished and it is likely that the distribution of migrant workers within each district will be skewed to the places where appropriate accommodation and jobs are readily available. Seaside towns are often able to offer this accommodation, for example in sub-divided former boarding houses and on caravan sites. The seaside tourist economy is also likely to be a prime employer of migrant workers, for example in hotels and catering, bearing in mind the low-wage and often temporary nature of this work. It is therefore likely that where a seaside town forms only a small part of a district the figure will understate the number of migrant workers relative to the seaside town's working age population.

Key points

- In terms of migrant workers, a number of the districts covering Welsh seaside towns are close to the average for Wales, but all are well behind the average for England.

- In relation to working age population, the far west of Wales (Pembrokeshire, Ceredigion and Gwynedd in this table) has attracted rather more migrant workers than the other districts covering seaside towns.

[16] 2007 data

Table 18: New NI registrations by non-UK nationals, 2005/06 to 2007/08 (ranked by % of local working age population)

LA (Seaside towns)	no.	as % working age
Pembrokeshire (Fishguard, Saundersfoot, Tenby)	2,050	3.1
Ceredigion (Aberaeron, New Quay)	1,450	3.0
Gwynedd (Abersoch, Barmouth, Criccieth, Porthmadog, Pwllheli, Tywyn)	2,060	3.0
Conwy (Llandudno/Colwyn Bay/Conwy)	1,440	2.3
Denbighshire (Rhyl/Prestatyn)	1,210	2.2
Bridgend (Porthcawl)	1,400	1.7
Isle of Anglesey (Benllech, Rhosneigr)	560	1.4
Vale of Glamorgan (Barry)	950	1.3
Wales	**49,710**	**2.8**
England	**1,824,350**	**5.7**

Source: DWP, ONS

3.10 Economic output

Table 19 shows Gross Value Added (GVA) per head.

The figures here refer to the NUT 3 region[17] covering each seaside town, rather than the town itself, and all cover a consideraby larger area. NUTS 3 is the lowest level for which this data is produced.

GVA is a measure of the economic output of an area. In so far as some of the output of the tourist industry falls within the 'black economy', and therefore goes unrecorded, and in so far as omissions of this type are more widespread in seaside towns than in the rest of the country, the figures will understate the GVA of areas covering seaside towns.

The GVA figures presented here are expressed in relation to the resident population. Commuting has the effect of boosting the recorded GVA per head in areas with net in-commuting and lowering the recorded GVA per head in areas with net out-commuting. In addition, a large retired population – a feature of virtually all seaside towns – lowers GVA per head relative to other areas.

Key points

- GVA per head in the parts of Wales containing seaside towns is almost always below the average for Wales, which in turn is well behind the average for England.
- The exception is Barry, which is part of the NUTS 3 region that also includes Cardiff.
- On average, GVA per head in the parts of Wales containing seaside towns is lower than in the areas covering English seaside towns.

[17] NUTS 3 regions are part of a standard EU-wide classification. Wales is divided into 12 NUTS 3 regions, which are individual unitary authorities or groups of neighbouring authorities.

Table 19: GVA per head in local NUT3 region, 2006

	Wales = 100
Welsh seaside towns	**96**
Wales	**100**
English principal seaside towns	111
English smaller seaside towns	100
England	136
Barry	141
Pwllheli	91
Abersoch	91
Tywyn	91
Barmouth	91
Porthmadog	91
Criccieth	91
Porthcawl	87
Saundersfoot	82
Tenby	82
Fishguard	82
New Quay	82
Aberaeron	82
Llandudno/Colwyn Bay/Conwy	81
Rhyl/Prestatyn	81
Rhosneigr	74
Benllech	74

Source: ONS

3.11 Housing

Table 20 shows the housing tenure in seaside towns, from the 2001 Census. These are the most up-to-date local figures available.

Table 21 shows the share of households living in overcrowded conditions, again from the 2001 Census. The measure of overcrowding used here is the official standard: the figures are the share of households with an ‘occupancy rating of minus 1 or less’, where the occupancy rating is based on a comparison between the number of rooms and the size and age composition of the household.

Table 22 shows the share of households lacking key amenities – defined as sole use of a bathroom/shower and toilet or central heating. The figures are again from the 2001 Census.

Key points

- Overall, Welsh seaside towns have a pattern of housing tenure that differs only marginally from the average for Wales – a somewhat below-average share in social rented accommodation (ie council or housing association) and an above-average share in the private rented sector.

- This is a pattern of housing tenure that Welsh seaside resorts share with their counterparts in England, though not quite to the same extent.

- There are differences between individual towns. Three – Benllech, Porthcawl and Saundersfoot - stand out as having very little social housing; Barry and Pwllheli have substantially more.

- The share of households in seaside towns living in overcrowded conditions is low and not a great deal different, overall, from the average for Wales.

- The proportion of households lacking key amenities (13 per cent) is rather larger, and further from the average for Wales (8 per cent) or indeed for English seaside towns. In practice, these figures are greatly influenced by the lack of central heating.

- In terms of lack of key amenities, there are big differences between individual seaside towns in Wales. A number of smaller places on the west and north west coast record particularly high figures.

Table 20: Housing tenure, 2001
(ranked by owner occupation rate)

	% of households		
	Owner-occupied	**Social rented**	**Private rented**
Welsh seaside towns	**72**	**14**	**14**
Wales	**71**	**18**	**11**
English principal seaside towns	72	12	16
English smaller seaside towns	74	12	14
England	69	19	12
Benllech	83	4	13
Porthcawl	82	6	12
Abersoch	75	11	14
Rhyl/Prestatyn	73	12	15
Fishguard	73	15	12
Saundersfoot	72	9	19
Llandudno/Colwyn Bay/Conwy	72	13	16
Porthmadog	71	15	14
Criccieth	71	12	17
Barry	71	20	9
Tywyn	68	14	18
New Quay	67	13	20
Rhosneigr	66	14	19
Tenby	65	16	19
Aberaeron	65	16	19
Pwllheli	59	22	19
Barmouth	57	18	25

Source: Census of Population

Table 21: Overcrowded households, 2001

	% of households
Welsh seaside towns	**5**
Wales	**4**
English principal seaside towns	7
English smaller seaside towns	4
England	7
Tenby	7
Barmouth	6
Rhyl/Prestatyn	5
Porthmadog	5
Fishguard	5
Pwllheli	5
Llandudno/Colwyn Bay/Conwy	5
Tywyn	5
Barry	4
Aberaeron	4
Saundersfoot	4
Porthcawl	3
Criccieth	3
New Quay	3
Abersoch	3
Benllech	2
Rhosneigr	2

Source: Census of Population

Table 22: Households lacking key amenities, 2001

	% of households
Welsh seaside towns	**13**
Wales	**8**
English principal seaside towns	11
English smaller seaside towns	9
England	9
Pwllheli	28
Barmouth	26
Tywyn	21
Rhosneigr	21
Abersoch	21
Porthmadog	19
Criccieth	18
Fishguard	18
New Quay	16
Llandudno/Colywyn Bay/Conwy	15
Rhyl/Prestatyn	15
Saundersfoot	13
Tenby	12
Aberaeron	11
Benllech	9
Barry	7
Porthcawl	4

Source: Census of Population

3.12 Deprivation

Table 23 shows the average rank of the Lower Super Output Areas (LSOAs) in each seaside town on the overall Welsh Indices of Deprivation for 2008. Since in detail the English and Welsh indices are compiled differently, no comparable figures for England can be presented here.

Tables 24 to 31 show the same information for each of the seven domains of the Welsh Indices of Deprivation 2008:

- Income
- Employment
- Health
- Education
- Access to services
- Housing
- Physical environment
- Community safety

A low number indicates high deprivation; a high number indicates lower deprivation. The average ranking of each town is a population-weighted average of the ranking of each constituent LSOA[18].

There are 1,896 LSOAs across England as a whole. Accordingly, an average ranking below 948 indicates that a town has an above average level of deprivation.

Because of the averaging process across deprived and more prosperous LSOAs within a town, very high or very low average rankings are on the whole unlikely.

Key points

OVERALL RANKING

- 8 of the 17 seaside towns have deprivation worse than the average for Wales (ie a ranking below 948).

- Two of the larger seaside towns – Rhyl/Prestatyn and Barry – are among those with deprivation above the Welsh average.

INCOME DEPRIVATION

- 9 of the 17 seaside towns have income deprivation worse than the average for Wales (ie a ranking below 948).

- Rhyl/Prestatyn and Barry occupy two of the four top spots.

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[18] This proven method has previously been deployed on several occasions by CRESR, including in the equivalent benchmarking studies covering English seaside towns.

EMPLOYMENT DEPRIVATION

- 5 of the 17 seaside towns have employment deprivation worse than the average for Wales (ie a ranking below 948).
- Rhyl/Prestatyn emerges particularly badly on this indicator.

HEALTH

- 4 of the 17 seaside towns have greater health deprivation than the average for Wales, including Rhyl/Prestatyn and Barry.
- Broadly, however, few Welsh seaside towns score especially badly (ie have a low average rank) on this indicator, and quite a number score relatively well – an indication that health problems in Wales are mainly concentrated in other areas such as the Valleys.

EDUCATION

- 5 of the 17 seaside towns have greater education and skills deprivation than the average for Wales.
- On this indicator, Rhyl/Prestatyn and Barry are again seaside towns that fare badly.

ACCESS TO SERVICES

- 8 of the 17 seaside towns are worse than the Welsh average on this indicator of access to services.
- The most disadvantaged seaside towns in this respect are, not surprisingly, the smaller and more remote towns in West Wales.
- This is not an indicator on which some of the seaside towns that display features of economic deprivation (eg Rhyl/Prestatyn) fare especially badly.

HOUSING

- All except two seaside towns in Wales (Benllech and Porthcawl) record worse deprivation than the average for Wales on this housing indicator.
- Bearing in mind the statistics that contribute to this indicator, the suspicion must be that it is strongly influenced by households lacking key amenities (Table 22 earlier), which in turn mostly reflects a lack of central heating. The reasons why a significant proportion of households in seaside towns in West Wales (in particular) lack central heating are unclear, but this is a feature these places share with seaside towns in the far South West of England[19].

[19] C Beatty, S Fothergill and I Wilson (2008) op. cit.

PHYSICAL ENVIRONMENT

- Only 5 of the 17 seaside towns fare badly (ie worse than the average for Wales) on this particular indicator.

- Several seaside towns fare very well indeed, including the LSOA covering New Quay which, at 1896, ranks as having the very best physical environment (on this indicator at least) anywhere in Wales.

COMMUNITY SAFETY

- 10 of the 17 seaside towns fare worse than the average for Wales on this indicator

- However, the detailed scores suggest that, compared to the rest of Wales, none of the seaside towns are severely affected by crime and disorder and a number of smaller towns in West Wales score well.

Table 23: Average overall deprivation ranking of LSOAs, 2008

	Average rank
Rhosneigr	692
Rhyl/Prestatyn	731
Barmouth	813
Barry	844
Pwllheli	870
Tywyn	926
Abersoch	934
Fishguard	944
Llandudno/Colwyn Bay/Conwy	1,049
Tenby	1,126
Porthmadog	1,174
Porthcawl	1,186
New Quay	1,204
Aberaeron	1,367
Saundersfoot	1,390
Benllech	1,482
Criccieth	1,486

Source: Welsh Indices of Deprivation

Table 24: Average ranking of LSOAs on income deprivation domain, 2008

	Average rank
Barmouth	643
Rhyl/Prestatyn	649
Rhosneigr	736
Barry	776
Tywyn	786
Fishguard	817
Pwllheli	847
Llandudno/Colwyn Bay/Conwy	915
Tenby	935
Porthcawl	1,041
Aberaeron	1,071
Abersoch	1,101
New Quay	1,142
Porthmadog	1,145
Benllech	1,161
Criccieth	1,176
Saundersfoot	1,179

Source: Welsh Indices of Deprivation

Table 25: Average ranking of LSOAs on employment deprivation domain, 2008

	Average rank
Rhyl/Prestatyn	708
Rhosneigr	709
Fishguard	819
Barry	854
Porthcawl	928
Tywyn	955
Barmouth	996
Aberaeron	1,006
Llandudno/Colwyn Bay/Conwy	1,018
Pwllheli	1,042
Tenby	1,150
New Quay	1,200
Benllech	1,288
Criccieth	1,340
Porthmadog	1,344
Saundersfoot	1,352
Abersoch	1,406

Source: Welsh Indices of Deprivation

Table 26: Average ranking of LSOAs on health domain, 2008

	Average rank
Tywyn	815
Rhyl/Prestatyn	858
Barry	909
Tenby	932
Barmouth	954
Abersoch	955
Porthcawl	983
Rhosneigr	1,041
Llandudno/Colwyn Bay/Conwy	1,058
Fishguard	1,075
Pwllheli	1,149
New Quay	1,160
Saundersfoot	1,188
Porthmadog	1,257
Criccieth	1,444
Benllech	1,505
Aberaeron	1,510

Source: Welsh Indices of Deprivation

Table 27: Average ranking of LSOAs on education domain, 2008

	Average rank
Rhyl/Prestatyn	613
Fishguard	790
Barry	809
Rhosneigr	842
Barmouth	880
Pwllheli	961
Tywyn	1,140
New Quay	1,153
Llandudno/Colwyn Bay/Conwy	1,160
Criccieth	1,183
Porthmadog	1,189
Aberaeron	1,247
Tenby	1,343
Saundersfoot	1,366
Abersoch	1,391
Porthcawl	1,525
Benllech	1,553

Source: Welsh Indices of Deprivation

Table 28: Average ranking of LSOAs on access to services domain, 2008

	Average rank
Abersoch	45
Rhosneigr	264
Benllech	408
New Quay	659
Saundersfoot	669
Porthcawl	793
Pwllheli	927
Criccieth	940
Llandudno/Colwyn Bay/Conwy	956
Tenby	965
Fishguard	1,054
Tywyn	1,064
Rhyl/Prestatyn	1,140
Porthmadog	1,155
Barmouth	1,166
Barry	1,185
Aberaeron	1,683

Source: Welsh Indices of Deprivation

Table 29: Average ranking of LSOAs on housing domain, 2008

	Average rank
Pwllheli	155
Barmouth	168
Porthmadog	305
New Quay	307
Rhosneigr	309
Tywyn	316
Abersoch	370
Tenby	413
Criccieth	456
Rhyl/Prestatyn	516
Fishguard	583
Saundersfoot	648
Aberaeron	693
Llandudno/Colwyn Bay/Conwy	718
Barry	899
Benllech	1,135
Porthcawl	1,357

Source: Welsh Indices of Deprivation

Table 30: Average ranking of LSOAs on physical environment domain, 2008

	Average rank
Porthmadog	279
Aberaeron	541
Pwllheli	558
Tywyn	852
Barry	898
Rhyl/Prestatyn	1,135
Abersoch	1,139
Llandudno/Colwyn Bay/Conwy	1,253
Rhosneigr	1,354
Barmouth	1,365
Tenby	1,497
Criccieth	1,544
Porthcawl	1,678
Fishguard	1,784
Benllech	1,857
Saundersfoot	1,876
New Quay	1,896

Source: Welsh Indices of Deprivation

Table 31: Average ranking of LSOAs on community safety domain; 2008

	Average rank
Barry	611
New Quay	628
Barmouth	663
Rhosneigr	686
Tenby	748
Rhyl/Prestatyn	765
Fishguard	800
Porthmadog	801
Llandudno/Colwyn Bay/Conwy	810
Pwllheli	939
Saundersfoot	1,028
Porthcawl	1,122
Abersoch	1,170
Tywyn	1,184
Aberaeron	1,327
Benllech	1,463
Criccieth	1,604

Source: Welsh Indices of Deprivation

4. ASSESSMENT

The social and economic conditions in a locality tend to be complex and multi-dimensional, making it hard for any single indicator to encapsulate the full range or extent of disadvantage. This applies to Welsh seaside towns as much as anywhere else. Their standing relative to the rest of Wales, and in comparison to English seaside towns, is nevertheless of considerable interest.

Just how disadvantaged are Welsh seaside towns?

The report includes nearly 30 indicators on which the average for Welsh seaside towns can be compared with the average for Wales as a whole.

The indicators do not present a consistent picture. On the one hand, there are five important indicators on which, on average, Welsh seaside towns emerge as more disadvantaged than Wales as a whole. These are:

- Employment rate
- Working-age benefit claimant rate
- Seasonal unemployment
- Earnings
- Housing lacking key amenities

But there are substantially more indicators on which the average for Welsh seaside towns is not far from the average for Wales as a whole. In a handful of cases, Welsh seaside towns are better than average.

This makes it hard to conclude that, taken as a whole, Welsh seaside towns are especially disadvantaged or deprived relative to the rest of Wales. The overall ranking of the towns within the Welsh Indices of Deprivation (Table 22 earlier) offers confirmation: around half the seaside towns are better than average and around half are worse.

This conclusion for Wales differs from that for England, where seaside towns have been identified as on average rather more disadvantaged than England as a whole[20]. A crucial factor here, of course, is that on a wide range of indicators Wales as a whole is more disadvantaged than England. In particular, many averages for Wales are dragged down by the substantial area of economic and social disadvantage in the Valleys. This tends to mask the extent of disadvantage in places such as seaside towns.

[20] C Beatty, S Fothergill and I Wilson (2008) op. cit, and C Beatty, S Fothergill and I Wilson (2009) op.cit.

How do Welsh seaside towns compare with their English counterparts?

Most of the indicators in the report also allow comparisons between seaside towns in England and Wales. These underline the limitations of comparisons that are purely internal to Wales.

On quite a number of indicators, the average for Welsh seaside towns is *worse* than for English seaside towns. These include:

- Employment rate
- Clamant unemployment rate
- Incapacity benefit claimant rate
- Overall working-age claimant rate
- Pension credit claimant rate
- Housing Benefit / Council Tax Benefit claimant rate
- Earnings
- New VAT registrations
- GVA per head in sub-region
- Housing lacking key amenities

The dimension in which Welsh seaside towns appear to out-perform their English counterparts is in terms of recent economic trends: employment growth in Welsh seaside towns has been a little faster, and working-age benefit claimant rates have fallen more quickly.

On balance, a reasonable conclusion would be that on average Welsh seaside towns are somewhat more disadvantaged than seaside towns in England, though possibly beginning to catch up.

The variation between towns

A key feature that emerges from the data is the *diversity* between individual seaside towns. The averages mask big differences between places. On just about all indicators, there are substantial numbers of seaside towns both above and below the average for Wales as a whole.

The Welsh Indices of Deprivation offer the best composite guide to the degree of disadvantage in individual towns. In particular, three domains within the Indices – income, employment, and education – together offer a reasonable guide to the more 'economic' dimension of disadvantage[21].

The four largest seaside towns, which together account for 80 per cent of the population, are worth considering at separately. On the basis of the three 'economic' indicators from the indices of deprivation, a clear ranking emerges **from worst to best**:

[21] Education is a useful 'economic' indicator in so far as qualifications, skills and training influence job opportunities and productivity at work.

1. Rhyl/Prestatyn
2. Barry
3. Llandudno/Colwyn Bay/Conwy
4. Porthcawl

In other words, among these four Rhyl/Prestatyn has the weakest local economy and Porthcawl the strongest. This is a judgment based on figures for the overall local economy, not the strength of just the local tourist sector[22]. Moreover, in so far as economic well-being partly reflect residents' opportunities for commuting, the proximity to other towns will play a part – a relevant factor for Barry (near Cardiff) and Porthcawl (near Bridgend) in particular.

This ranking of the four larger Welsh seaside towns is probably consistent with informed perceptions.

The remaining 13 Welsh seaside towns, all with a population below 10,000, can be ranked in the same way. Their average ranking on the income, employment and education domains places them in the following order, again **from worst to best**:

1. Rhosneigr
2. Fishguard
3. Barmouth
4. Tywyn
5. Pwllheli
6. Aberaeron

7= New Quay
7= Tenby
9= Criccieth
9= Porthmadog
11= Abersoch
11= Benllech
13. Saundersfoot

It would be wrong to place too much emphasis on lists of this sort, based on just a handful of indicators. More generally, within most seaside towns there are likely to be pockets of acute deprivation that are not reflected in average statistics for the town as a whole. The lists do however offer a useful insight into the relative economic well-being of the towns.

[22] The ranking is consistent across the three economic domains with the exception that Porthcawl and Llandudno/Colwyn Bay/Conwy swap places on the employment deprivation domain.