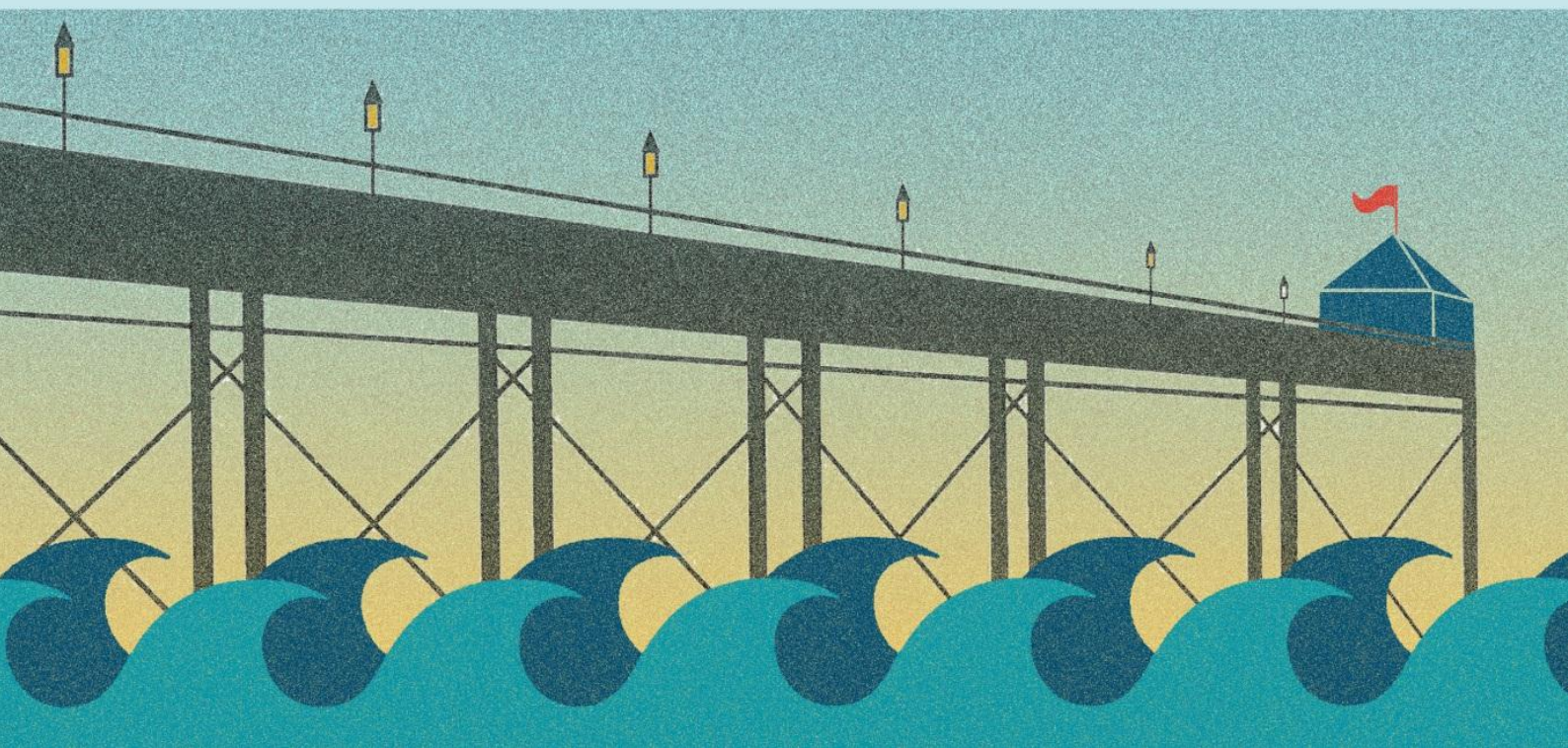


Seaside Towns in the Age of Austerity

*Recent trends in employment in seaside
tourism in England and Wales*

Christina Beatty
Steve Fothergill
Tony Gore



SEASIDE TOWNS IN THE AGE OF AUSTERITY

Recent trends in employment in seaside tourism
in England and Wales

Christina Beatty, Steve Fothergill and Tony Gore

**Centre for Regional Economic and Social Research
Sheffield Hallam University**

July 2014

Acknowledgement

This research was commissioned by British Destinations, the UK-wide association of local authorities and tourism bodies, with financial contributions from Visit Wales (Welsh Government) and the British Amusement Catering Trade Association. The research has also been undertaken with the support of the Department for Communities and Local Government. The authors are particularly grateful to Peter Hampson, Chief Executive of British Destinations, for his unstinting support for this work.

The report's findings are entirely the responsibility of the Sheffield Hallam research team.

Contents

Summary

Purpose of the report

The impact of austerity

Measuring the scale of tourism

Geographical coverage

Principal seaside towns

Smaller seaside towns

Other seaside destinations

Holiday parks

Overall coverage and omissions

Statistical methods

Comparator towns

Adjusting for 'central place' effects

Employment data

Seasonality

How reliable?

Employment in seaside tourism – new estimates

National overview

Employment by resort

Dependence on tourism

Growth and decline

Employment by sector

Employment by region

Assessment

Comparisons with other industries

The wider local economic impact

Implications of the findings

Appendix A: Location of seaside towns

Appendix B: Comparator towns

Appendix C: Seaside tourism jobs by sector by town

British Destinations



britishdestinations.net

Supported by



Visit Wales
Croeso Cymru

Cyngor Bwrdeistref Sirol



Portsmouth
the great waterfront city



Adur & Worthing
councils

Tendring
District Council



Blackpool Council

Summary

The impact of economic austerity on Britain's seaside tourist industry has so far been very unclear. This report updates previous estimates of the employment supported by seaside tourism to cover the years since 2008. The report provides figures for 121 individual resorts around the coast of England and Wales.

The job figures are all rooted in official published statistics. At the core of the estimates, employment levels in key sectors, such as shops, hotels and restaurants, in seaside towns are compared with employment levels in other towns where there is little significant tourism. This is a proven method that generates plausible results.

The new estimate is that in the places and sectors covered by the report, 212,000 jobs were directly supported by seaside tourism in 2010-12. This is an 'average year-round' figure and represents an increase of 5,000 on the figure for 2006-08. The seaside tourist industry has, it seems, weathered the post-2008 economic downturn relatively well and even sustained the modest growth that was evident before the recession.

But locational shifts have also been underway. Brighton's tourist economy appears to be going from strength to strength but Blackpool, in contrast, appears to have lost significant numbers of tourist-related jobs. The figures suggest there is growth in several South Coast resorts and in many smaller resorts in the South West. These trends are unlikely to be explained by austerity alone.

The seaside tourist industry remains a large employer – bigger than the motor industry, aerospace or pharmaceuticals for example, and comparable to telecommunications. Adding in all the jobs indirectly supported by the industry, through the supply chain and multiplier effects, could push the figure as high as 600,000.

The report concludes that the survival of a large seaside tourist industry should be good news, not just for most seaside towns but also for UK plc. The challenge now is to ensure that the industry delivers its full potential in the coming years.

SEASIDE TOWNS IN THE AGE OF AUSTERITY

Purpose of the report

This report provides new estimates of the number of jobs supported by seaside tourism in England and Wales.

In a report published in 2010¹, the present authors provided the first reliable estimates of employment supported by seaside tourism in each of more than a hundred individual resorts around the English and Welsh coastline. The report confirmed that employment in the industry remains substantial and had grown over the preceding decade. The effect was to dispel popular myths about the terminal decline of the British seaside tourist industry. However, the figures in the report all stopped at 2008.

The financial crisis of 2008 ushered in a new 'age of austerity'. Initially there was a deep recession, then a long period of stuttering economic growth. By 2014 the UK economy was growing again but overall output has still not returned to pre-recession levels. Average earnings are lower in real terms, unemployment is higher, welfare benefits have been cut, and public spending has been squeezed. The impact on UK seaside tourism has so far been profoundly unclear.

The role of the present report is therefore to up-date the previous estimates of seaside tourism employment to cover the post-2008 era.

The impact of austerity

The ways in which the age of austerity has impacted on the UK seaside tourist industry are far from clear.

In theory, lower incomes mean that households have less to spend on discretionary activities. Indeed, because items such as food and housing are generally regarded as the first claim on people's budgets it is likely that when incomes are squeezed, spending on leisure and tourism will fall especially steeply. This potentially spells very bad news for the British seaside tourist industry.

¹ C Beatty, S Fothergill, T Gore and I Wilson (2010) *The Seaside Tourist Industry in England and Wales: employment, economic output, location and trends*, CRESR, Sheffield Hallam University. Report commissioned by the British Resorts and Destinations Association (now British Destinations) and its member authorities and partners.

But the real world is more complex. Many people may be deeply reluctant to spend less on holidays or travel. Capital purchases such as new cars or furniture may be deferred instead. Additionally, the impact of austerity has not fallen evenly on all groups. Households with mortgages have actually benefited substantially from low interest rates, and pensions have been protected by inflation up-rating. Young adults (hit hard by unemployment) and benefit claimants (including the working poor) have arguably been the two groups facing the biggest squeeze on their incomes.

Furthermore, the new age of austerity may have actually made British seaside resorts a more attractive destination. Foreign holidays have usually been seen as a prime competitor to the British seaside, so lower incomes may mean that households still go on holiday but opt for UK destinations instead. Added to this, since 2008 the shift in the exchange rate between sterling and the euro has made a number of foreign destinations – notably Spain, Portugal, France, Italy and Greece – substantially more expensive.

The press has talked a great deal about the rise of the ‘staycation’ – holidaying in Britain rather than abroad – but without much hard evidence to support the assertion. In reality, the net impact of austerity on British seaside tourism has so far been very unclear.

Measuring the scale of tourism

Counting the number of jobs supported by seaside tourism is not straightforward. As the 2010 report explained, the problem from a statistical point of view is that the seaside tourist industry is unlike any other. Industries such as steel, aerospace, motor vehicle manufacturing or even banking are made up of businesses and workplaces that can fairly easily be identified and counted. They constitute specific categories in official statistics and trends in their employment and output can be monitored.

The seaside tourist industry is different. The jobs it supports are spread across a range of sectors – hotels, shops, restaurants, cafes, bars and attractions. The trouble is that jobs in many of these sectors are supported by local consumer spending as well as by tourism. Disentangling the impact of one from the other, and quantifying the impact of tourism, is not easy.

Visitor surveys have been the traditional approach to solving this problem. There is no single model, but visitor surveys typically assemble information on a sample of individuals’ travel patterns and spending, which are then grossed-up for the population as a whole to generate statistics on numbers and spending. This approach tends to be very costly – large-scale surveys are not cheap – and national surveys struggle to generate reliable statistics for individual places. Survey-based estimates are further complicated by the fact that although overnight stays are currently monitored on an annual basis, the national data on day trips – which are hugely important in some resorts – is assembled far more infrequently. Local surveys attempt to circumvent some of the problems but differences in methods result in statistics that are rarely comparable between places or through time, let alone comprehensive in coverage.

The approach adopted here, first deployed in the 2010 report, is radically different. Instead of trying to estimate the *input* to seaside economies in terms of tourist numbers or tourist spend, it counts the *output* in terms of jobs supported by seaside tourism. This approach is based on published official statistics that are available for all parts of the country.

The figures that the approach is able to generate are: **comprehensive**, in that they cover just about all the places where seaside tourism is a significant component of the local economy; **consistent**, in that they provide figures for each individual seaside resort on a comparable basis; and **comparable through time**, in that they allow trends to be monitored nationally and locally. It might also be added that, in comparison to large-scale visitor surveys, the approach deployed in the present report is remarkably **cost effective**.

The core of the approach involves comparisons between seaside resorts and towns with little or no tourism. All towns have jobs in sectors such as shops, restaurants and hotels, but seaside resorts have more than others because of tourist spending. In essence, the approach adopted here measures *the additional jobs in seaside resorts that are attributable to tourism*.

All towns also receive visitors. These include trips to family and friends, business travellers, contractors from outside the area and visitors attending specific events, such as football matches or concerts. These days, most large towns can also boast at least one tourist attraction that draws in visitors from elsewhere. Some of the visitors support jobs in hotels, and more generally visitors add to consumer spending and thereby support jobs in shops, restaurants and so on.

As in the 2010 report, the way in which seaside tourism is measured here includes all the jobs in tourism-related sectors in seaside resorts that cannot be attributed either to local consumer spending or to the background level of visitors found in even some of the least-visited towns around the country. It also includes the tourism jobs supported by day-trippers as well as by overnight visitors.

Therefore if a seaside resort attracts more retail spending because shoppers prefer to shop there, the additional employment in retailing is counted as tourism jobs. Likewise, if a seaside resort draws in the conference trade to a greater extent than other places, the additional jobs also count as tourism jobs. And, if seaside resorts draw in more night-clubbers, hen parties or stag nights than elsewhere, the additional jobs supported again count as tourism jobs. 'Seaside tourism' has always been a lot more than just family holidays on the beach.

The core of the approach, to repeat, is to measure the additional jobs in seaside towns that are attributable to tourism. This is done primarily by comparing employment levels in seaside towns against levels in comparable towns around the country where there is little or no significant tourism.

Geographical coverage

The report covers 121 places around the coast of England and Wales. These are listed in Table 1 and can be divided into four broad categories.

Principal seaside towns

The list of principal seaside towns in has its origins in a 2003 report, *The Seaside Economy*². The same group of towns (in England) was the basis of a 2008 study commissioned by the Department for Communities and Local Government³. Appendix A shows their location. The 41 principal seaside towns in England and Wales have a combined population (in 2011) of just under 3.2m.

The principal seaside towns are all places with a population of at least 10,000⁴ where tourism is a significant component of the local economy. These seaside towns (or 'resorts') are a distinctive group of places. Because of their history of tourism they tend to share a number of characteristics that distinguish them from other industrial or commercial centres along the coast or inland. This includes a specialist tourist infrastructure (promenades, piers, parks etc.), holiday accommodation (hotels, guest houses, caravan sites) and a distinctive resort character that is often reflected in the built environment.

There is no hard-and-fast dividing line between seaside towns/resorts and other places along the coast. At the time of the *Seaside Economy* report, the British Resorts Association⁵ was consulted in drawing up the list of principal seaside towns but the final decisions were those of the research team. The list covers nearly all the places most famously associated with the British seaside tourist industry, from very large resorts such as Blackpool, Brighton and Bournemouth through to smaller places such as Whitby, Newquay and St Ives.

All the principal seaside towns are accurately defined in terms of their built-up urban area, using LSOA⁶ boundaries. What this means is that the seaside town is often defined more tightly than the local authority district of which it forms part. In a small number of other cases the built-up urban area spills out beyond local authority boundaries – Bournemouth, Brighton, Blackpool and Worthing are cases in point, and to denote this the title 'Greater' is attached to each of these towns. 'Greater Bournemouth' includes Christchurch and Poole. 'Greater Brighton' includes Shoreham as well as Hove. 'Greater Blackpool' includes Lytham St Anne's and Fleetwood. 'Greater Worthing' includes Littlehampton.

There are other instances where neighbouring towns have been added together to produce more meaningful units. This reflects the focus of the *Seaside Economy* report on labour markets, which tend to operate across relatively broad areas. Thus Margate, Broadstairs

² C Beatty and S Fothergill (2003) *The Seaside Economy*, CRESR, Sheffield Hallam University.

³ C Beatty, S Fothergill and I Wilson (2008) *England's Seaside Towns: a benchmarking study*, CLG, London.

⁴ Swanage has slipped below this threshold since the list was first drawn up.

⁵ Now British Destinations

⁶ Lower Super Output Areas (LSOAs) are local statistical units each with a typical population of around 1,500.

Table 1: Population of seaside towns, 2011

| | no. | | no. | | no. |
|--------------------------------|---------|-------------------------------|--------|----------------------|--------|
| Principal seaside towns | | | | | |
| Greater Bournemouth | 371,000 | Amble | 6,600 | Harwich | 20,100 |
| Greater Brighton | 307,200 | Filey | 6,500 | Tynemouth | 19,700 |
| Greater Blackpool | 262,500 | Tenby | 6,400 | Aberystwyth | 19,000 |
| Greater Worthing | 199,400 | Dymchurch/St Marys | 6,300 | Hayling Island | 17,400 |
| Southend-on-Sea | 173,700 | Saltburn-by-the-sea | 6,000 | Mumbles | 16,600 |
| Isle of Wight | 138,300 | Dartmouth | 5,600 | Frinton/Walton | 15,700 |
| Hastings/Bexhill | 133,400 | Fishguard | 5,400 | Lymington | 15,400 |
| Torbay | 131,000 | Pwllheli | 5,400 | Seaburn | 12,900 |
| Thanet | 127,400 | Watchet | 4,900 | Selsey | 10,700 |
| Eastbourne | 99,400 | Budleigh Salterton | 4,600 | | |
| Southport | 90,400 | East Wittering | 4,600 | Holiday parks | |
| Weston-super-Mare | 76,100 | Sutton | 4,400 | Kessingland | 5,100 |
| Whitstable/Herne Bay | 71,500 | Grange-over-sands | 4,100 | Hemsby | 4,400 |
| Llandudno/Colwyn/Conwy | 68,900 | Looe | 4,100 | Camber | 3,100 |
| Folkestone/Hythe | 65,900 | Hunstanton | 4,000 | Greatstone | 3,100 |
| Great Yarmouth | 62,000 | Westward Ho | 3,900 | Hopton | 2,600 |
| Lowestoft | 61,900 | Lyme Regis | 3,700 | Ingoldmells | 2,400 |
| Scarborough | 56,800 | Padstow | 3,700 | Brean | 2,200 |
| Clacton | 55,300 | Porthmadog | 3,500 | Borth | 2,100 |
| Weymouth | 52,300 | Benllech | 3,400 | Harlech | 2,000 |
| Barry | 51,500 | Silloth | 3,300 | St. Davids | 1,800 |
| Morecambe/Heysham | 48,400 | Tywyn | 3,300 | Sand Bay | 1,700 |
| Bognor Regis | 43,600 | Aldeburgh | 3,200 | Primrose Valley | 1,600 |
| Rhyl/Prestatyn | 42,900 | Chapel St Leonards | 3,100 | Skipsea | 1,600 |
| Whitley Bay | 40,800 | Mundesley | 2,800 | Cayton Bay | 1,500 |
| Bridlington | 38,800 | Seahouses | 2,800 | | |
| Exmouth | 34,400 | Arnside | 2,600 | | |
| Dawlish/Teignmouth | 30,400 | Perranporth | 2,600 | | |
| Deal | 30,100 | Saundersfoot | 2,600 | | |
| Newquay | 23,700 | Wells-next-the-sea | 2,600 | | |
| Falmouth | 21,800 | Barmouth | 2,500 | | |
| Burnham | 21,200 | Rhosneigr | 2,400 | | |
| Penzance | 21,000 | Mevagissey | 2,300 | | |
| Skegness | 19,600 | Abersoch | 1,800 | | |
| Porthcawl | 16,000 | Criccieth | 1,800 | | |
| Sidmouth | 13,700 | Lynton/Lynmouth | 1,600 | | |
| Whitby | 13,200 | Salcombe | 1,600 | | |
| Minehead | 12,000 | Fowey | 1,500 | | |
| St Ives | 11,800 | Aberaeron | 1,400 | | |
| Ilfracombe | 11,500 | Portreath | 1,300 | | |
| Swanage | 9,600 | New Quay | 1,100 | | |
| | | Southwold | 1,100 | | |
| Smaller seaside towns | | | | | |
| Sheringham | 8,400 | Other s/s destinations | | | |
| Mablethorpe | 8,200 | New Brighton | 60,800 | | |
| Hornsea | 8,100 | South Shields | 53,800 | | |
| Bude | 8,000 | Isle of Sheppey | 40,300 | | |
| Cromer | 7,700 | Redcar | 33,200 | | |
| Withernsea | 7,400 | Cleethorpes | 30,100 | | |
| West Mersea | 7,200 | Southsea | 29,800 | | |
| Seaton | 7,100 | Felixstowe | 26,500 | | |

Source: Census of Population

and Ramsgate, as well as the two smaller towns of Birchington and Westgate on Sea, are all added together as 'Thanet'. Hastings and Bexhill are included as a single town, as well as Llandudno, Colwyn Bay and Conwy in Wales. The whole of the Isle of Wight is included as one 'town', partly because seaside tourism is widely spread throughout the island and partly because its separation from the mainland accentuates the extent to which it functions as a discrete labour market.

Smaller seaside towns

The list of smaller seaside towns has its origins in two other studies. The first is report covering England's smaller seaside towns⁷ and the second a similar exercise for seaside towns in Wales⁸. Both involved the accurate identification and mapping of seaside towns/resorts with a population of less than 10,000. Appendix A again shows their location. The 50 smaller seaside towns in England and Wales have a combined population (in 2011) of 210,000.

Whilst few smaller coastal towns and villages are devoid of tourism, there are still a number of smaller places around the coast that are essentially industrial or residential settlements rather than resorts. Former mining villages along the Durham coast, such as Easington, Blackhall and Horden, are examples excluded from this list. The research team was guided by a range of information, notably the *AA Book of the Seaside*⁹, which though somewhat dated provides an unrivalled, consistent and detailed description of virtually everywhere along the coastline of Great Britain.

For each smaller seaside town, the boundaries are accurately defined at LSOA level. The use of LSOAs as the building block effectively sets a lower size threshold of around 1,500 people below which smaller seaside towns cannot be separately identified for statistical purposes. This allows the inclusion of places such as Hunstanton, Wells, Sheringham and Cromer along the Norfolk coast, and Salcombe, Fowey, Padstow and Bude in Devon and Cornwall but has the effect of excluding a number of smaller places where tourism is prominent - examples along the Yorkshire coast include Staithes, Sandsend and Robin Hood's Bay.

Other seaside destinations

The other seaside destinations covered in the report are a mixed group of places. A number are sub-parts of larger urban areas. Cleethorpes, which is an integral part of Grimsby, is the most prominent example. Others include Seaburn within Sunderland, Southsea within Portsmouth and Mumbles within Swansea. This category also includes a number of essentially industrial or commercial towns where seaside tourism is an additional component of the local economy – Felixstowe and Harwich are examples. The list also includes a major

⁷ C Beatty, S Fothergill and I Wilson (2011) *England's Smaller Seaside Towns: a 'benchmarking' study*, CLG, London.

⁸ C Beatty, S Fothergill and I Wilson (2010) *Seaside Towns in Wales: a 'benchmarking' study*, report to Visit Wales

⁹ Automobile Association (1972) *AA Book of the Seaside*, Drive Publications, London.

yachting centre (Lymington) and residential areas with significant holiday/caravan parks (for example Hayling Island, Selsey and the Isle of Sheppey).

The 16 'other seaside destinations', shown in Appendix A, have a combined population (in 2011) of 420,000. The identification of these other seaside destinations was again guided by the *AA Book of the Seaside*. Each has been accurately mapped at LSOA level.

Holiday parks

The final category of places included in the study are described here as 'holiday parks'. In practice this is a wider group of places than just holiday camps, including a number of places where there is a concentration of camping and caravan sites. The 14 holiday parks, shown in Appendix A, have a combined population (in 2011) of 35,000.

The holiday parks are all in essentially rural coastal locations. They mostly comprise individual LSOAs. Decisions on inclusion were informed by scrutiny of fine-grain local maps. This category of seaside places is not intended to be a comprehensive list of holiday park locations, many of which fall within the boundaries of the other seaside towns covered in this report. Thus the large holiday camp at Ingoldmells, near Skegness in Lincolnshire, is listed separately, but the equivalent large holiday camp near Minehead in Somerset falls within the boundary of the town.

Overall coverage and omissions

The 121 places covered by the present study have a combined population of just over 3.8m. This varies from more than a third of a million in Greater Bournemouth to less than 2,000 in a number of smaller seaside towns.

These 121 places provide coverage of the seaside tourist industry in England and Wales that is only marginally short of comprehensive. The omissions are:

- *Very small seaside towns, below the 1,500 population threshold.* There may be 50-100 of these, with a particular concentration in South West England, and in practice they may be proportionally more dependent on tourism and/or holiday homes than larger seaside towns but their diminutive size means that even in total they are unlikely to account for many tourism jobs.
- *More isolated camping and caravan sites.* These are quite numerous – few areas along the coast are completely bereft of sites. However, other than the jobs on the sites themselves, much of the employment supported by the associated tourist spending may be in the seaside towns covered in the report.
- *Tourist-related businesses along the coast between the main resorts.* This will include pubs, cafes, shops, hotels and guest houses in more isolated locations, for

example near secluded coves and along coastal footpaths. Some specific seaside tourist attractions (for example at Land's End) also come into this category.

- *'Seaside' elements of some industrial or commercial towns.* The present study does not cover absolutely all towns along the coast or on estuaries. Additional places such as Dover, Liverpool, Hull and Plymouth do have further small numbers of seaside tourism jobs, especially if 'maritime heritage' is included.
- *The inland spend of seaside tourists.* For visitors who stay for several days in a seaside resort, particularly those with a car, nearby inland tourist attractions can be an important part of the holiday experience. The approach deployed in the report measures only the jobs supported by seaside tourism in the seaside towns themselves.

Statistical methods

Comparator towns

The core of the approach to the measurement of tourism involves comparisons between seaside towns and other towns with little or no significant tourism. There are several hundred towns of varying size and function across England and Wales as a whole. As in the 2010 report, the places excluded as possible comparators were:

- *London*, because it is a major tourist destination in its own right
- *London's immediate commuting hinterland*, because the scale of this commuting is likely to have a major distorting effect on the distribution of consumer spending (and thereby jobs) across the region
- *Major regional cities* (e.g. Birmingham, Manchester, Bristol, Liverpool, Nottingham etc.) partly on the basis that they are larger than seaside towns and partly because they too pull in significant numbers of tourists and visitors
- *Inland tourist destinations* (e.g. York, Cambridge, Chester, Cheltenham, Stratford on Avon)
- *Towns in or near National Parks*, because they are likely to have employment levels boosted by tourist spending

Filtering out these places leaves 168 towns across England and Wales, listed in Appendix B, each with a population of 10,000 or more, as potential comparators. To be comparable with the seaside towns, the built-up area of each of the comparator towns is also accurately mapped at LSOA level.

For smaller seaside towns (those with a population below 10,000) a slightly different approach has been adopted. As in the 2010 report, 25 towns of similar size on or near the coast, also listed in Appendix B, are used as comparators. This approach responds to the very much larger number of small towns up and down the country and better reflects the impact of a coastal location. The small comparator towns are again all accurately identified and mapped at LSOA level.

Adjusting for 'central place' effects

A major complication in making comparisons between seaside towns and other places is the extent to which different towns function as a 'central place'. This refers to the extent to which towns function as service centres for their hinterland and operates most clearly in the context of retailing but also a wide range of other services. In a nutshell, in relation to their population some places have more service jobs than others because they pull in more consumer spending from elsewhere. This matters because each seaside town needs to be compared against towns that function as a central place to a similar extent.

Other things being equal, larger towns tend to function more as central places than smaller towns. However, what matters most is the size of the town in relation to the size of its hinterland: the bigger the hinterland (in population terms) in relation to the town, the greater the extent to which a town functions as a central place. The distances between towns matter too – a town located close to a major city is unlikely to function as much of a central place. By its very nature, a coastal location is also likely to reduce the extent to which a town functions as a central place because half the town's potential hinterland is in effect missing.

To enable meaningful comparison, the 41 principal seaside towns, 16 other seaside destinations and 168 comparator towns have each been allocated to one of six categories on the basis of the extent to which they function as a central place:

- A: Large hinterland in relation to population
- B: Significant spending pull from surrounding areas
- C: Largely self-contained, with some pull from neighbouring areas
- D: Modest loss of spending to neighbouring town(s)
- E: Major loss of spending to neighbouring town(s)
- F: Sub-area of bigger built-up area

The descriptions are indicative. The important point is the continuum, and the need to compare like-with-like.

The allocation of places to categories (see Appendix B) is taken from the 2010 report. The allocation of comparator towns is based on the total number of jobs¹⁰ per 10,000 residents¹¹ in retailing and hotels/restaurants. The allocation of seaside towns is based on their size relative to their hinterland and their proximity to competing service centres. First-hand knowledge of the towns and their surrounding areas also informed the allocation.

¹⁰ In 2005-07, from the Annual Business Inquiry

¹¹ In 2007, from the mid-year population estimates

The vast majority of seaside towns are in categories D and E. This should perhaps not be surprising because the coastal location of all the towns limits the extent of their hinterland and most seaside towns are poorly located in relation to the strategic road network. This means that in the absence of seaside tourism the consumer spending in most seaside towns – in shops, pubs, restaurants, hotels and so on – would be below what might be expected in an inland town of comparable size.

Some examples help clarify the allocation:

- Aberystwyth and Penzance (in category B) are both relatively small towns that serve substantial hinterlands, in Central Wales and West Cornwall respectively
- Greater Bournemouth and Greater Brighton (in category C) are large urban areas but their hinterlands are relatively small in relation to their size and (in the case of Brighton in particular) London exercises a competing pull
- Minehead and Skegness (in category C) are small towns that act as local service centres for rural hinterlands
- Greater Blackpool and Greater Worthing (in category D) face the competing retail pulls of Preston and Brighton respectively
- In category D, Southport is overshadowed by Liverpool, Weston super Mare by Bristol, Redcar by Middlesbrough, and Torbay by both Exeter and Plymouth, though all these seaside towns do have more localised hinterlands
- In category E, several of the seaside towns are close to important regional service centres – Felixstowe and Harwich to Ipswich, Exmouth and Dawlish/Teignmouth to Exeter, Falmouth to Truro, Morecambe/Heysham to Lancaster, Whitley Bay and South Shields to Newcastle
- Thanet (in category E) is surrounded on three sides by the sea, has three lesser town centres (Margate, Ramsgate and Broadstairs) rather than a single large centre to attract trade, and nearby Canterbury acts as the main sub-regional service centre

To estimate the number of jobs supported by seaside tourism, employment in each seaside town is compared with the average (per 10,000 residents) for the comparator towns in its category¹². The effect is that to change the category in which a seaside town is placed would change the estimated number of jobs supported by seaside tourism. The

¹² Comparator towns are not identified here for places in category F, which are sub-parts of bigger urban areas (or, in the cases of Frinton/Walton and Selsey, essentially residential areas close to bigger towns). The comparator in category F has instead been set at two-thirds of the number of jobs per 10,000 residents, in the relevant sectors, in category E comparator towns. Direct comparators are also not identified for 'holiday parks', where all the jobs in the six sectors are counted as being supported by tourism.

comparisons are made sector-by-sector (see below) and the extra jobs in the seaside town, over and above the comparator, are deemed to be supported by tourism¹³.

Employment data

The employment figures used in this report are from the government's Business Register and Employment Survey (BRES). BRES produces estimates of employees in employment for local areas, broken down by sector¹⁴

The jobs directly supported by seaside tourism are likely to be found in six main sectors of the local economy. These are listed in Table 2, which shows the detailed specification of each sector¹⁵. In seaside towns, it is a reasonable assumption that just about all the jobs in two of the six sectors – campsites and short-stay accommodation, and amusement parks and theme parks – will be supported by tourism. The 'benchmarking' approach is therefore not applied to these sectors, but instead all the jobs are attributed to tourism. The other four sectors are more mixed, including jobs supported by tourism as well as by local consumer spending¹⁶. The benchmarking approach is applied to these four sectors¹⁷.

The overwhelming majority of the jobs directly supported by seaside tourism can be expected to be found in these six sectors. The principal estimates presented in this report therefore refer specifically to these sectors.

For clarity, the omissions from the resulting estimates are:

- Directly supported tourist jobs outside the six sectors
- Jobs in other sectors supported through the supply chain
- Wider multiplier effects, for example via the spending of wages earned in the tourist sector

¹³ In a very small number of cases a strict application of the method outlined here identifies implausibly low or negative numbers of jobs supported by tourism in retailing in relation to the estimated numbers supported by tourism in hotels and restaurants. In these cases the number of jobs supported in retailing has been set at 30 per cent of the number supported in hotels and restaurants.

¹⁴ BRES has recently replaced the Annual Business Inquiry (ABI), which provided the employment statistics that were the basis of the 2010 report. Although the changeover from ABI to BRES introduces a discontinuity in employment statistics, the magnitude is unlikely to distort the figures presented here.

¹⁵ The sectors here are defined in terms of the 2007 Standard Industrial Classification (SIC). The figures in the 2010 report were based on the 2003 SIC. The two definitions have been matched as closely as possible to enable comparisons through time.

¹⁶ In Greater Blackpool an adjustment has been made to compensate for the loss of 3,000 jobs at a government office complex, which will have depressed local consumer spending. The adjustment adds 500 to the estimated number of jobs directly supported by seaside tourism.

¹⁷ Separate small adjustments have been made to avoid distortions arising from large port facilities and the national offices of major travel agencies and tour companies.

Table 2: Key sectors covering jobs directly supported by seaside tourism
(Defined in terms of the 2007 Standard Industrial Classification)

RETAIL TRADE

47 Retail trade (excl. 47.3)

HOTELS AND RESTAURANTS

55.1 Hotels and similar accommodation

56 Food and beverage services

CAMPSITES AND SHORT-STAY ACCOMMODATION

55.2 Holiday and other short-stay accommodation

55.3 Campsites, RV parks and trailer parks

55.9 Other accommodation

TRANSPORT

49.32 Taxis

49.39 Other land transport

50.1 Ferries etc.

52.22 Harbours etc.

79 Travel agencies, tour operators and related activities

RECREATION, SPORTING AND CULTURAL ACTIVITY

59.14 Cinemas

90 Creative, arts and entertainment activities (excl. 90.03)

91 Libraries, archives, museums, historic buildings, zoos (excl. 91.012)

92 Gambling and betting activities

93.1 Sports activities (excl. 93.13)

93.29 Other amusement and recreation activities

AMUSEMENT PARKS AND THEME PARKS

93.21 Amusement parks and theme parks

BRES data is based on a sample survey and the resulting employment estimates for local areas can as a result fluctuate a little from year to year. To circumvent the problem, the local figures presented in this report are a three-year average covering 2010-12 (the most recent years for which data is currently available)¹⁸. These estimates are compared with the figures from the 2010 report which covered the three-year period 2006-08. The effect is to up-date the previous estimates of tourism employment by four years, from immediately prior to the 2008 financial crisis to well into the new era of austerity.

To adjust for self-employment, the BRES figures have been revised up by the ratio between total employment (including the self-employed) and employees in each town (by sector, gender and full/part-time) in the 2001 Census of Population. A further flat-rate adjustment has been made for the increase in self-employment across all the seaside and comparator towns between 2001 and 2011.

The BRES data used here does not differentiate between full and part-time employment. It also counts all the individual jobs held by men and women who have more than one job.

¹⁸ A handful of corrections have also been made where the BRES data for specific sectors in specific years and towns is clearly in error.

Seasonality

It has always been known that employment in the seaside tourist economy fluctuates with the seasons, peaking in the summer months and reaching a trough during the winter.

The BRES employment data nominally refers to September each year. What this means is that BRES records employment in seaside towns when it is well below its mid-summer peak. The raw figures therefore need to be revised upwards to adjust for seasonality.

Monthly figures for each town allow seasonal fluctuations in claimant unemployment to be accurately identified. But this is only part of the overall picture. There is a long tradition of seaside businesses employing students over the summer and of employing temporary workers from further afield, including migrant workers from abroad. Some seasonal workers can also be expected to drop out of the labour market altogether over the winter rather than claim benefits. The fluctuations in claimant unemployment therefore provide a *minimum* estimate of the extent of seasonality though they probably provide a reliable guide to the extent to which individual towns are affected.

The approach adopted here, as in the 2010 report, is to add in the whole of the seasonal fluctuation in claimant unemployment in the district covering each seaside town¹⁹ to provide an estimate of *average year-round employment in the tourist sector*²⁰.

This procedure adds 25,000 jobs to the estimated average year-round employment in seaside tourism in England and Wales. Implicitly, if each of these seasonal jobs lasts six months, this method suggests that summer employment in the seaside tourist industry is 50,000 higher than in the winter. If the seasonal jobs on average last only four months, the method suggests that peak employment is 75,000 higher than in winter. As noted in the 2010 report, fluctuations of this magnitude in seaside tourism employment are consistent with data on seasonal fluctuations in total UK employment.

How reliable?

The employment figures presented in this report, like its 2010 predecessor, are *estimates*. Because seaside tourism jobs are spread across several sectors, and because they are often tangled up in the same businesses with jobs supported by local consumer spending, the figures are inevitably a best assessment in the light of the available statistical evidence. Six points are worth noting.

¹⁹ District data is used here because the seasonal unemployed may not live in the seaside town itself, especially in the case of the smallest seaside towns. The resulting estimate of the seasonal fluctuation in seaside tourism employment is capped at 50 per cent of the base-level estimate of tourism employment in order to take account of a small number of cases where the seaside town is only a very small part of a much larger district. Where there is more than one seaside town in a district, the seasonal adjustment is allocated between the towns on the basis of the base-level employment estimates. The seasonal fluctuations are measured over the 2000-07 period, when the fluctuations can be more accurately identified in the absence of strong national trends in overall numbers.

²⁰ In each town, the seasonal employment has been allocated by sector in proportion to the base-level estimates of tourist jobs by sector in the town.

First, the allocation of seaside towns to 'central place' categories has an important impact on the final figures. Moving a seaside town from category D to C, for example, would reduce the estimated employment in seaside tourism by 165 jobs per 10,000 population, or 1,650 jobs for a town of 100,000 people. Lowering a town between categories would boost the estimated employment.

Second, seasonal fluctuations in employment cannot be measured directly. The method used here, based on fluctuations in claimant unemployment, generates estimates that are consistent with national data and takes account of the differences in the extent of seasonality between towns.

Third, the estimates take no account of differences between towns in average incomes. Other things being equal, where incomes are higher, spending will be higher and more jobs will therefore be supported in local retailing and consumer services. Seaside towns can often be low-wage economies, and they nearly all have an above-average proportion of pensioner households. In seaside towns, local consumer spending might therefore support fewer jobs than elsewhere, leading to an under-estimation of the number of jobs supported by tourism. But against this line of argument it is worth noting that most of the comparator towns used here are not themselves especially affluent.

Fourth, there is the role of the 'black economy'. This is, by its very nature, unquantifiable. It might be expected that in an industry such as seaside tourism, where a lot of employment is temporary and many transactions are by cash, cash-in-hand working will be more widespread and employment may go unrecorded. On the other hand, it is not self-evident that the black economy operates on a large scale across Britain as a whole or in seaside towns in particular. In this respect, Britain is arguably more law-abiding, and more tax-paying, than many other countries.

Fifth, given the methods deployed here, some of the estimation errors will tend to cancel out. The figures for tourism employment in individual towns will be less reliable than the figures for regions, and the regional estimates less reliable than for England and Wales as a whole.

Sixth, the estimates do not count all the jobs that involve some contact with tourists, which will in all cases be much larger. In practice, many business and individual employees serve both tourists and local residents. On a day-by-day and even minute-by-minute basis, the same employee in a shop or cafe for example may deal with both tourists and local residents, and it is one of the distinctive characteristics of the seaside tourist industry that, unlike most manufacturing, it does not occur behind factory gates but is instead deeply intertwined with the everyday life and urban fabric of seaside resorts. The estimates here refer to the additional jobs found in seaside towns as a result of their role as tourist destinations. Thus if a business employs ten people rather than five because it serves tourists, only the extra five jobs count as tourism jobs even though all ten employees may have contact with tourists at some stage.

Ultimately, the employment estimates are best judged by their *plausibility*, both in terms of the absolute numbers and comparisons between individual places.

Employment in seaside tourism – new estimates

National overview

The new, overall estimate of ‘average year-round’ employment directly supported by seaside tourism in England and Wales, in the 121 resorts covered by this report, is presented below. This new figure is for the period 2010-12 and is contrasted with the earlier estimate, from the 2010 report, for 2006-08²¹:

| | |
|-----------------|----------------|
| 2010-12: | 212,000 |
| 2006-08: | 207,000 |

The key observation here is that employment in seaside tourism is estimated to be slightly higher now than before the 2008 recession and the onset of the age austerity.

It is important to note that the most recent employment data here is for 2012 and therefore excludes any impact arising from the up-turn in UK economic growth from 2013 onwards.

That the seaside tourist industry in England and Wales appears to have weathered the post-2008 economic downturn relatively well indicates that the downward pressures on the seaside tourist business (such as lower incomes) have in practice been more than offset by other factors (such as the cost of holidays in the eurozone). The estimates provide evidence that there is probably some substance in the much-discussed rise of ‘staycations’.

This small increase in seaside tourism employment – around 0.6 per cent a year over this period – is actually a continuation of a trend identified in the 2010 report, which estimated that between 1998/2000 and 2006/8 tourism employment in the 41 principal seaside towns increased by 14,000, or a little over 1 per cent a year. The 2010 report also speculated that over the same period the increase across all 121 seaside resorts might be around 20,000.

What appears to have happened is that the difficult economic conditions since 2008 have slightly slowed the growth of the British seaside tourist industry but not brought the growth entirely to a halt.

These new figures, taken alongside the employment growth identified in the 2010 report, provide powerful evidence that the British seaside tourist industry is alive and well²². Reports of its death, or at least its terminal decline, seem well wide of the mark.

²¹ The published figure in the 2010 report rounded up the estimate to 210,000.

²² In the present report, estimates of gross value added (GVA) in the seaside tourist industry have not been included alongside employment estimates. This is because the official data on GVA per head, by sector at the regional scale, offers only a poor guide to GVA in the same sectors in seaside towns. Accordingly, the GVA estimates in the 2010 report should be regarded as speculative and insufficiently robust to be repeated here.

Employment by resort

Table 3 shows the estimated average year-round employment in seaside tourism in 2010-12 in each seaside town. Figure 1 presents this data in map form. In Appendix C these headline figures for each town are broken down by sector.

It comes as no surprise that the three largest seaside conurbations – Greater **Blackpool**, Greater **Brighton** and Greater **Bournemouth** – have the largest concentrations of jobs dependent on seaside tourism, with 13-16,000 each. Blackpool remains the capital of bright lights and amusements and continues to have the biggest single concentration of seaside tourism jobs in Britain. Brighton has a major seaside conference industry. Bournemouth has a large holiday trade and a substantial conference trade as well. All are favoured destinations for day trippers and party-goers.

Fourth on the list comes **Torbay** with an estimated 10,300 jobs. Although Torbay has three component parts – Torquay, Brixham and Paignton – the Torbay area as a whole is smaller than the three seaside conurbations above it on the list, with a population of just 131,000. The large number of jobs in seaside tourism in Torbay reflects the area's continuing appeal to visitors and holidaymakers from around the country.

In fifth place, the **Isle of Wight**, with an estimated 7,900 seaside tourism jobs, is a distinctive place in its own right because of its physical separation from the mainland but tourist jobs are actually spread across a number of smaller places including Shanklin, Sandown, Ryde, Cowes and Ventnor.

Newquay and **Great Yarmouth** are also estimated to have more than 5,000 seaside tourist jobs, though probably for somewhat different reasons. Great Yarmouth is a major traditional resort in the mould of Blackpool, though not on the same grand scale. Newquay's concentration of seaside tourist jobs is remarkable for such a small town (pop 24,000) and reflects the town's appeal not only as a family holiday destination but also as the surfing capital of Britain.

The **Llandudno / Colwyn Bay / Conwy** area in North Wales, also with 5,000 jobs, demonstrates that it remains an important magnet for visitors. A further eight towns, including **Southport**, **Eastbourne**, **Weymouth** and **Scarborough**, have an estimated 3-4,000 jobs in the seaside tourist industry.

Further down the list, **Skegness** and the neighbouring holiday park complex at **Ingoldmells** each have just under 3,000 jobs in seaside tourism. Combined, their seaside tourism employment places them on a par with Newquay and Great Yarmouth – a great many jobs for another area with a small resident population (around 22,000).

In all, there are 63 places where employment in seaside tourism is estimated to be at least 1,000. These include some quite small towns such as Whitby, St Ives, Sidmouth, Bude, Hunstanton, Cromer, Dartmouth, Tenby, Porthmadog, Looe, and Padstow.

Table 3: Average year-round employment directly supported by seaside tourism, 2010/12

| | no. of jobs | | no. of jobs | | no. of jobs |
|------------------------|-------------|----------------------|-------------|---------------------|-------------|
| Greater Blackpool | 15,900 | Kessingland | 1,400 | Isle of Sheppey | 500 |
| Greater Brighton | 15,200 | Porthcawl | 1,400 | Perranporth | 500 |
| Greater Bournemouth | 13,300 | Redcar | 1,300 | Wells-next-the-sea | 500 |
| Torbay | 10,300 | Hayling Island | 1,300 | Barmouth | 500 |
| Isle of Wight | 7,900 | Hunstanton | 1,300 | Saundersfoot | 500 |
| Newquay | 5,900 | Lymington | 1,200 | Sand Bay | 400 |
| Great Yarmouth | 5,400 | Aberystwyth | 1,200 | Skipsea | 400 |
| Llandudno/Colwyn/Conwy | 5,000 | Mumbles | 1,200 | Filey | 400 |
| Southport | 4,400 | Cromer | 1,200 | Saltburn-by-the-sea | 400 |
| Eastbourne | 4,000 | Porthmadog | 1,200 | Seaton | 400 |
| Weymouth | 3,900 | Hopton | 1,100 | Westward Ho | 400 |
| Scarborough | 3,800 | Ilfracombe | 1,100 | Aberaeron | 400 |
| Thanet | 3,800 | Swanage | 1,100 | Fishguard | 400 |
| Cleethorpes | 3,200 | Whitley Bay | 1,100 | Borth | 300 |
| Hastings/Bexhill | 3,200 | Looe | 1,100 | Amble | 300 |
| Southend-on-Sea | 3,000 | Lyme Regis | 1,100 | Chapel St Leonards | 300 |
| Weston-super-Mare | 2,900 | Felixstowe | 1,000 | Mevagissey | 300 |
| Ingoldmells | 2,800 | New Brighton | 1,000 | Portreath | 300 |
| Skegness | 2,800 | Seaburn | 1,000 | Silloth | 300 |
| St Ives | 2,800 | Burnham | 1,000 | New Quay | 300 |
| Southsea | 2,600 | Salcombe | 1,000 | Greatstone | 200 |
| Falmouth | 2,600 | Whitstable/Herne Bay | 900 | Harlech | 200 |
| Minehead | 2,500 | Aldeburgh | 900 | Deal | 200 |
| Bognor Regis | 2,300 | Mablethorpe | 900 | Arnside | 200 |
| Bridlington | 2,300 | Camber | 800 | Budleigh Salterton | 200 |
| Morecambe/Heysham | 2,200 | Hemsby | 800 | East Wittering | 200 |
| Folkestone/Hythe | 2,100 | Frinton/Walton | 800 | West Mersea | 200 |
| Clacton | 2,100 | Southwold | 800 | Withernsea | 200 |
| Tenby | 2,000 | Pwllheli | 800 | Benllech | 200 |
| Whitby | 1,900 | Primrose Valley | 700 | Criccieth | 200 |
| Dawlish/Teignmouth | 1,900 | Selsey | 700 | Tywyn | 200 |
| Exmouth | 1,900 | Tynemouth | 700 | Barry | 100 |
| Sidmouth | 1,900 | St. Davids | 700 | Dymchurch/St Marys | 100 |
| South Shields | 1,800 | Fowey | 700 | Sutton | 100 |
| Greater Worthing | 1,700 | Lynton/Lynmouth | 700 | Mundesley | * |
| Lowestoft | 1,700 | Cayton Bay | 600 | Rhosneigr | * |
| Bude | 1,700 | Grange-over-sands | 600 | Watchet | * |
| Penzance | 1,600 | Hornsea | 600 | | |
| Rhyl/Prestatyn | 1,600 | Seahouses | 600 | | |
| Padstow | 1,600 | Sheringham | 600 | | |
| Dartmouth | 1,500 | Abersoch | 600 | | |
| Brean | 1,400 | Harwich | 500 | | |

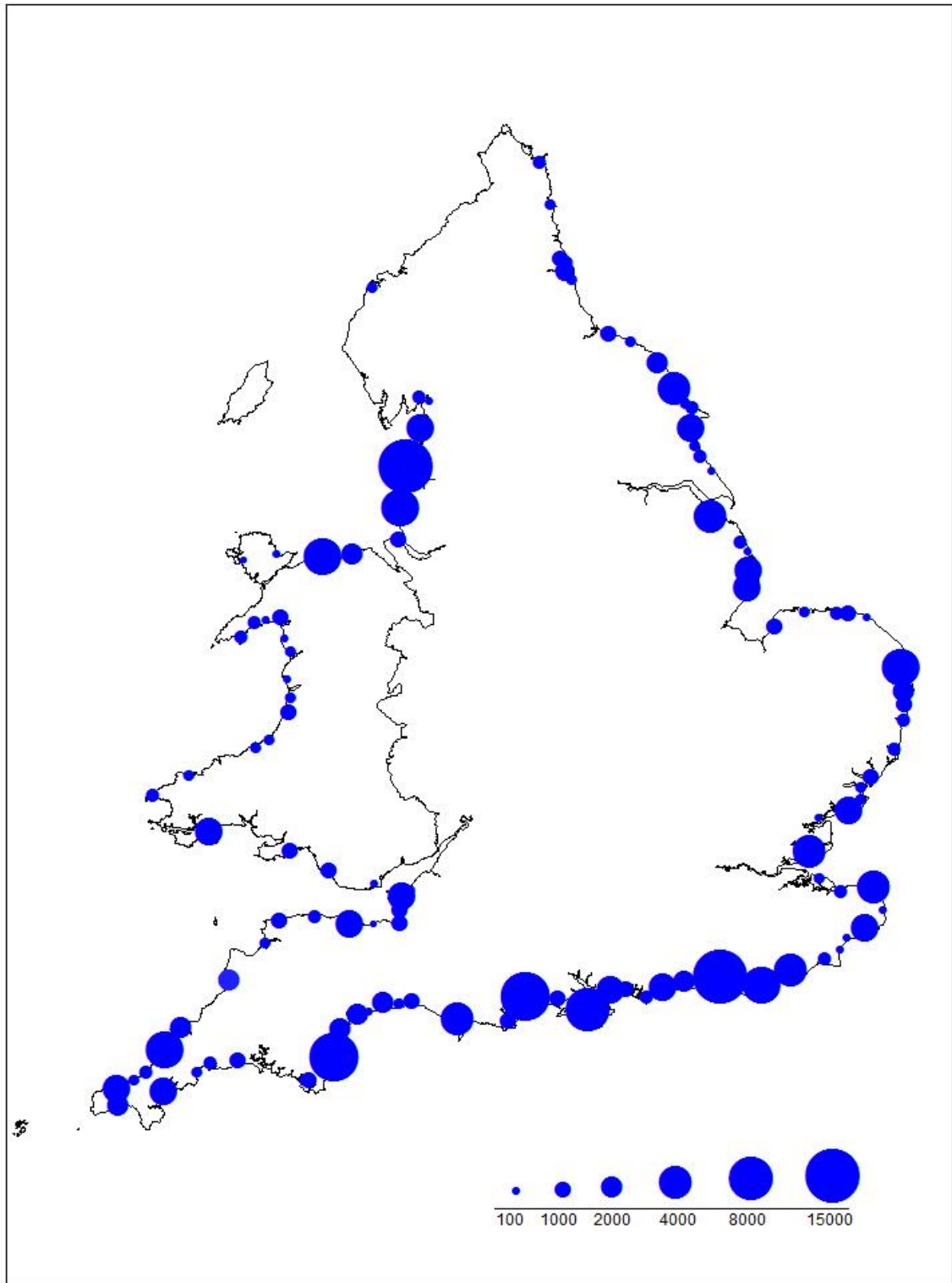
* below 100

Source: Sheffield Hallam estimates based on BRES

BRES data from Office for National Statistics licenced under the Open Government Licence v.2.0

© Crown copyright

Figure 1: Average year-round employment directly supported by seaside tourism, 2010/12,



Source: Sheffield Hallam estimates based on BRES

Dependence on tourism

Table 4 looks at the varying extent to which seaside towns depend on tourism. For each town, this shows the share of all jobs in the town (in all sectors of the economy) estimated to depend directly on seaside tourism²³. In this table the towns are ranked from those with the highest dependence on seaside tourism down to the lowest.

The places with the greatest dependence on seaside tourism are nearly all very small places, in particular the 'holiday parks' where there is little other employment of any kind. Putting aside the special case of the holiday parks, the proportion of jobs dependent on tourism still exceeds 50 per cent in a number of smaller seaside towns such as Salcombe, Fowey and Southwold. In a number of somewhat larger places the proportion is also high – Newquay (48 per cent), St Ives (42 per cent) and Whitby (29 per cent) are examples.

However, in larger resorts the proportion of jobs directly dependent on seaside tourism is generally much lower – just 14 per cent in Blackpool, 9 per cent in Brighton, and 7 per cent in Bournemouth for example. In Torbay the proportion is 16 per cent, in Great Yarmouth 16 per cent, and in Scarborough 13 per cent. These more modest proportions are unsurprising. In all larger towns, whether by the coast or elsewhere, there is generally a wide range employment, including jobs in the public sector in health, education and local government and jobs supported by local consumer spending. So even though tourism may remain critically important to the local economy it does not by itself account for an overwhelming share of employment.

In these larger resorts the significance of tourism is better judged against the size of the local 'economic base' – the share of jobs serving markets outside the town. It is the growth of this economic base that mostly drives the local economy. Tourism, like most manufacturing, is part of a town's economic base. Measuring a town's economic base is not straightforward but it might typically account for 20-40 per cent of local employment. The implication is that in larger resorts, where seaside tourism accounts for 10 per cent or more of all jobs the dependence of the local economy on tourism is quite high, and where the proportion reaches or exceeds 20 per cent the dependence is very high indeed.

At the other end of the spectrum, there are a number of larger resorts where seaside tourism is clearly now only a small element of the local economy. The figures for Southend (4 per cent) and Greater Worthing (2 per cent), for example, illustrate the extent to which an on-going seaside tourist industry now sits alongside much more diverse commercial and residential economies.

²³ For places that are sub-parts of larger urban areas (Seaburn, Cleethorpes, Southsea and Mumbles are examples) the comparisons are with the numbers of jobs located specifically in these places rather than in the wider town of which they form part. In the case of Seaburn for example, the comparison is therefore not with jobs in Sunderland as a whole.

Table 4: Share of total employment in each town directly supported by seaside tourism, 2010/12

| | % | | % | | % |
|--------------------|----|------------------------|----|----------------------|----|
| Brean | 93 | Minehead | 35 | Budleigh Salterton | 14 |
| Ingoldmells | 91 | Grange-over-sands | 34 | West Mersea | 14 |
| Hopton | 85 | Criccieth | 33 | Rhosneigr | 14 |
| Hemsby | 79 | Cromer | 31 | Greater Blackpool | 14 |
| Salcombe | 66 | Mumbles | 30 | Scarborough | 13 |
| Borth | 64 | Whitby | 29 | Lymington | 13 |
| Skipsea | 62 | Southsea | 29 | Isle of Wight | 13 |
| Lynton/Lynmouth | 62 | Arnside | 29 | Rhyl and Prestatyn | 12 |
| Abersoch | 62 | Sidmouth | 28 | Burnham | 12 |
| New Quay | 61 | Swanage | 28 | Aberystwyth | 11 |
| Padstow | 61 | Skegness | 28 | Clacton | 11 |
| Fowey | 60 | Benllech | 27 | Southport | 11 |
| Looe | 59 | Porthcawl | 27 | Morecambe/Heysham | 11 |
| Southwold | 56 | Falmouth | 27 | South Shields | 10 |
| St. Davids | 55 | Pwllheli | 25 | Sutton | 10 |
| Hunstanton | 54 | Hayling Island | 24 | Dymchurch/St Marys | 10 |
| Tenby | 54 | Aberaeron | 23 | Redcar | 10 |
| Seahouses | 53 | Ilfracombe | 23 | Greater Brighton | 9 |
| Chapel St Leonards | 51 | Filey | 21 | Weston-super-Mare | 9 |
| Camber | 51 | Sheringham | 21 | Whitley Bay | 9 |
| Aldeburgh | 50 | East Wittering | 21 | Eastbourne | 9 |
| Saundersfoot | 49 | Weymouth | 20 | Thanet | 9 |
| Newquay | 48 | Hornsea | 20 | Harwich | 8 |
| Barmouth | 48 | Dawlish/Teignmouth | 20 | Lowestoft | 7 |
| Greatstone | 48 | Cayton Bay | 20 | New Brighton | 7 |
| Portreath | 47 | Silloth | 20 | Greater Bournemouth | 7 |
| Primrose Valley | 46 | Saltburn-by-the-sea | 19 | Felixstowe | 6 |
| Mevagissey | 46 | Frinton/Walton | 19 | Hastings/Bexhill | 6 |
| Lyme Regis | 45 | Seaton | 19 | Folkestone/Hythe | 6 |
| Wells-next-the-sea | 45 | Bridlington | 19 | Whitstable/Herne Bay | 4 |
| Kessingland | 44 | Exmouth | 19 | Isle of Sheppey | 4 |
| Dartmouth | 44 | Tynemouth | 18 | Southend-on-Sea | 4 |
| Sand Bay | 43 | Fishguard | 18 | Deal | 3 |
| Porthmadog | 43 | Great Yarmouth | 16 | Mundesley | 3 |
| Harlech | 42 | Amble | 16 | Greater Worthing | 2 |
| St Ives | 42 | Torbay | 16 | Barry | <1 |
| Perranporth | 42 | Tywyn | 15 | Watchet | <1 |
| Seaburn | 37 | Selsey | 15 | | |
| Bude | 37 | Bognor Regis | 15 | | |
| Mablethorpe | 36 | Withernsea | 15 | | |
| Cleethorpes | 35 | Llandudno/Colwyn/Conwy | 14 | | |
| Westward Ho | 35 | Penzance | 14 | | |

Source: Sheffield Hallam estimates based on BRES

BRES data from Office for National Statistics licenced under the Open Government Licence v.2.0

© Crown copyright

Growth and decline

Table 5 shows the change in seaside tourism employment, by town, between 2006-08 and 2010-12. The 2006-08 figures that have been fed into these calculations are taken from the 2010 report²⁴. The 2010-12 figures are the new estimates, presented earlier in Table 3.

It is important to note that the seemingly precise figures presented here are all subject to a margin of error, especially because of fluctuations from year to year in the ABI and BRES employment data (both based on sample surveys) on which all the estimates are ultimately based. In addition there are discontinuities between the two datasets. Small changes in employment in individual towns – much less than say 300 – should not therefore be treated as wholly reliable.

There are nevertheless clear patterns in the data on employment change, and divergent trends between individual resorts.

Two observations at either end of the spectrum dominate the figures on employment change. The first is the very strong growth of tourism employment in **Brighton** – up by an estimated 3,300 in just a handful of years against a dismal national economic backdrop. The precise figure here, as for all the other towns, is subject to a margin of error but growth on this scale is unlikely to be just a statistical aberration. Furthermore, the methods underpinning this estimate automatically deduct any increase in employment in sectors such as shops and restaurants that has arisen from Brighton's rapidly growing population²⁵.

Two factors may explain the strength of Brighton's tourist economy. One is the economic resilience and population growth of its hinterland in South East England, including London which is just an hour away by train. The other is the fashionable and in part culturally alternative niche that Brighton has come to occupy. It has become a 'go-to' destination for shopping, eating, entertainment and the conference trade, for short breaks and for day trips. Its appeal is often to the young, affluent and professional.

The other notable observation is the reduction in seaside tourism employment in **Blackpool** – down by an estimated 3,200 over the same period. Again, though this figure is subject to a margin of error a decline of this magnitude is unlikely to be just a statistical aberration. The fine detail of the employment data suggests that Blackpool's job loss is spread across several sectors of the tourist economy but is particularly marked in hotels and restaurants. Also, just as population growth in Brighton cannot explain away its apparent rise in tourism employment, the estimation methods mean that Blackpool's modest fall in population²⁶ cannot account for the observed decline.

²⁴ The 2006-08 figures for Redcar and Tenby have been revised to be consistent with the later data. There has also been a minor revision to the figure for Greater Blackpool to correct for an error in the ABI data for 2006.

²⁵ Between 2007 and 2011 Greater Brighton's population grew from 284,300 to 307,200, or 8 per cent.

²⁶ Between 2007 and 2011 Greater Blackpool's population fell from 264,600 to 262,500, or just under 1 per cent.

Table 5: Increase in employment directly supported by seaside tourism, 2006/08 to 2010/12

| | no. of jobs | | no. of jobs | | no. of jobs |
|------------------------|-------------|--------------------|-------------|----------------------|-------------|
| Greater Brighton | 3,300 | Seahouses | 100 | Grange-over-sands | -100 |
| Greater Bournemouth | 1,200 | Selsey | 100 | Benllech | -100 |
| Torbay | 1,100 | Lynton/Lynmouth | 100 | Mundesley | -100 |
| Bognor Regis | 800 | Cromer | 100 | Saundersfoot | -100 |
| Eastbourne | 800 | Wells-next-the-sea | 100 | Aberaeron | -100 |
| Cleethorpes | 700 | Redcar | * | Budleigh Salterton | -100 |
| Newquay | 600 | Watchet | * | Mumbles | -100 |
| Weymouth | 500 | Kessingland | * | Barry | -100 |
| Lowestoft | 500 | Abersoch | * | Harwich | -100 |
| Minehead | 500 | Aldeburgh | * | Greater Worthing | -100 |
| Weston-super-Mare | 500 | Rhosneigr | * | Saltburn-by-the-sea | -100 |
| Sidmouth | 400 | Arnside | * | Felixstowe | -100 |
| Burnham | 400 | Fowey | * | Seaburn | -100 |
| Llandudno/Colwyn/Conwy | 400 | Greatstone | * | South Shields | -100 |
| Folkestone/Hythe | 400 | Looe | * | Fishguard | -200 |
| Dartmouth | 300 | Skipsea | * | Isle of Sheppey | -200 |
| Exmouth | 300 | Aberystwyth | * | Penzance | -200 |
| Hopton | 300 | Frinton/Walton | * | Great Yarmouth | -200 |
| Padstow | 300 | Hastings/Bexhill | * | Porthmadog | -200 |
| Ingoldmells | 300 | Hunstanton | * | Ilfracombe | -200 |
| Lymington | 300 | East Wittering | * | Sheringham | -200 |
| Brean | 300 | Isle of Wight | * | Withernsea | -300 |
| St Ives | 200 | Sutton | * | Southsea | -300 |
| Falmouth | 200 | Silloth | * | Rhyl/Prestatyn | -300 |
| Salcombe | 200 | Dymchurch/St Marys | * | Deal | -400 |
| Swanage | 200 | Skegness | * | Whitley Bay | -400 |
| Westward Ho | 200 | Sand Bay | * | Southend-on-Sea | -400 |
| Southwold | 200 | Porthcawl | * | Whitstable/Herne Bay | -400 |
| Clacton | 200 | Pwllheli | * | Scarborough | -500 |
| Camber | 200 | New Quay | * | New Brighton | -500 |
| Dawlish/Teignmouth | 100 | Filey | * | Southport | -900 |
| Lyme Regis | 100 | Perranporth | * | Thanet | -1,000 |
| Hayling Island | 100 | Seaton | * | Greater Blackpool | -3,200 |
| Bude | 100 | Tenby | * | | |
| Hornsea | 100 | Tywyn | -100 | | |
| Morecambe/Heysham | 100 | Hemsby | -100 | | |
| Tynemouth | 100 | Whitby | -100 | | |
| Mablethorpe | 100 | Harlech | -100 | | |
| Amble | 100 | Borth | -100 | | |
| Portreath | 100 | St. Davids | -100 | | |
| West Mersea | 100 | Mevagissey | -100 | | |
| Chapel St Leonards | 100 | Criccieth | -100 | | |
| Primrose Valley | 100 | Barmouth | -100 | | |
| Bridlington | 100 | Cayton Bay | -100 | | |

* below 100

Source: Sheffield Hallam estimates based on BRES

BRES data from Office for National Statistics licenced under the Open Government Licence v.2.0

© Crown copyright

The reduction in tourism employment in Greater Blackpool is consistent with a range of socio-economic data that has been emerging for Blackpool in recent years. Blackpool borough, at the heart of the conurbation, has for example one of the highest working-age benefit claimant rates in Britain. The causes of Blackpool's job loss are however less clear.

It seems likely that one cause is the opposite of the factors that have kept Brighton so buoyant. Blackpool has traditionally drawn on visitors from the industrial North and, further afield, from the Glasgow area. These are places where incomes have been squeezed. Even within the North, Blackpool's core markets have often been the older and less well-off (squeezed by austerity) and young adults in search of 'a good time' (squeezed by unemployment). The scale of the job loss in Blackpool does however seem too large to be explained by austerity alone.

Blackpool's significant job loss in 'hotels and restaurants' almost certainly reflects a shift from traditional B&Bs to hotel chains which employ fewer staff per visitor. Blackpool used to major in family-run guest houses but in recent times these have been dwindling rapidly in number. This assessment is certainly consistent with Blackpool Council's view that visitor numbers – though not necessarily visitor spend – have held up reasonably well.

There is therefore no reason to assume that the job losses in Blackpool over this particular period will necessarily continue, especially at the same pace. If Blackpool's tourist industry can adapt it still has a future and the sheer scale and pull of Blackpool's vast tourist infrastructure suggests that something substantial will survive.

Other parts of the North that appear to be losing out on a lesser scale include Scarborough, Whitley Bay, New Brighton (in the Wirral) and, not too far away in North Wales, the Rhyl/Prestatyn area.

In addition to Brighton, a number of significant resorts along the south coast – Bournemouth, Torbay, Bognor Regis and Eastbourne – have experienced solid employment growth in tourism, in part perhaps on the back of the prosperity of southern England. The Thanet area in Kent (Margate, Ramsgate and Broadstairs) has bucked this trend, registering a 1,000 reduction in tourism jobs to add to what is widely recognised to be major job losses in earlier years, whilst Deal, Whitstable/Herne Bay and (just across the Thames estuary) Southend also appear to have shed tourism jobs, suggesting that locational trends are more complex than a simple North-South divide.

Looking more closely the fashionable status of a number of smaller resorts, particularly in the South West, is reflected in employment trends with solid if unspectacular increases in for example Newquay (600), Minehead (500), Sidmouth (400), Exmouth (300), Dartmouth (300), Padstow (300) St Ives (200), Swanage (200) and Salcombe (200). The consistency of this trend once more suggests that it is more than a statistical aberration. All these are destinations often favoured by the affluent middle class.

Employment by sector

For England and Wales as a whole, Table 6 shows the number of jobs supported by seaside tourism broken down by sector.

Hotels and restaurants account for the largest number – almost 100,000. The retail trade accounts for a further 56,000. Both these figures are the *extra jobs* in seaside towns supported by tourism, not the headline number of jobs in either sector which, as noted earlier, will include jobs supported by local consumer spending.

Table 6: Breakdown by sector of average year-round employment directly supported by seaside tourism, England and Wales

| | 2006/08 | 2010/12 |
|-------------------------------|----------------|----------------|
| Hotels and restaurants | 99,000 | 99,000 |
| Retail trade | 55,000 | 56,000 |
| Campsites & short-stay accom. | 28,000 | 31,000 |
| Recreation, sport, culture | 16,000 | 16,000 |
| Amusement parks | 5,000 | 5,000 |
| Transport | 5,000 | 5,000 |
| Total | 207,000 | 212,000 |

All numbers rounded to nearest 1,000, so totals may not sum

Source: Sheffield Hallam estimates based on BRES

BRES data from Office for National Statistics licenced under the Open Government Licence v.2.0

© Crown copyright

The number of jobs in ‘amusement parks’ – 5,000 – should be treated with caution. This is the official figure for employment in this sector in these towns and, given the methods followed here, has not been subject to significant adjustment or estimation. However, the BRES data for individual resorts suggests that there are inconsistencies in the official figures in the allocation of businesses between the ‘amusement’ and ‘recreation’ industries. This is hardly surprising. The figures in Appendix C, for individual resorts, therefore merge these two categories. The figure in Table 6 for employment in amusement parks should be regarded as a *minimum estimate*, with many seaside amusement arcades actually placed in the ‘recreation’ category.

Since 2006/8, campsites and other short-stay accommodation have provided the main source of net employment growth. Across England and Wales as a whole, seaside tourism employment in the other sectors has remained broadly stable.

Employment by region

Table 7 shows the change in seaside tourism employment by region.

The figures in the 2010 report indicated that the South West of England accounted for the largest number of jobs. In the years after 2008 the South West has consolidated this lead, adding a further 7,000 jobs – an increase of more than 10 per cent. As the figures for individual resorts (in Table 5) showed earlier, this growth has been spread around quite a number of destinations.

The South East too has experienced growth in seaside tourism employment, but this particular figure is dominated by the expansion in Brighton. The big loser has been the North West of England, where 4,000 jobs in seaside tourism have disappeared. Most of these are in Blackpool but there have been important job losses in Southport as well.

Table 7: Breakdown by region of average year-round employment directly supported by seaside tourism

| | 2006/08 | 2010/12 |
|----------------------|---------|---------|
| South West | 61,000 | 68,000 |
| South East | 46,000 | 49,000 |
| North West | 29,000 | 25,000 |
| East of England | 23,000 | 23,000 |
| Wales | 20,000 | 19,000 |
| Yorkshire and Humber | 14,000 | 14,000 |
| North East | 7,000 | 7,000 |
| East Midlands | 6,000 | 7,000 |
| England and Wales | 207,000 | 212,000 |

All numbers rounded to nearest 1,000, so totals may not sum

Source: Sheffield Hallam estimates based on BRES

BRES data from Office for National Statistics licenced under the Open Government Licence v.2.0

© Crown copyright

It should not escape notice that, putting aside the North West, the number of seaside tourism jobs in every region is estimated to have either increased or been broadly stable. This is a highly positive achievement when set against the extremely unfavourable national economic background over this period. Indeed, given the margin of error in all the estimates, little weight should be attached to the very small job loss in Wales (an estimated 1,000) especially as it is at variance with more positive data on tourism in Wales as a whole²⁷.

²⁷ Visit Wales notes that the number of tourism related jobs in Wales as a whole increased by 6,000 according to BRES data for 2008-2012, and Cardiff Business School has estimated an increase of 13 per cent in Welsh tourism employment between 2007 and 2011.

Assessment

Comparisons with other industries

Table 8 compares the estimated employment in the seaside tourist industry with employment in a number of other important industries. The seaside tourism figures are the new estimates for England and Wales. The figures for the other industries are for Great Britain as a whole but exclude the self-employed.

Table 8: Employment in selected industries, 2012

| | no. of jobs |
|-------------------------------|----------------|
| Computer software | 502,000 |
| Higher education | 450,000 |
| Insurance & pension companies | 310,000 |
| SEASIDE TOURISM | 212,000 |
| Telecommunications | 193,000 |
| Publishing | 142,000 |
| Motor industry | 129,000 |
| Radio, television, film | 117,000 |
| Advertising | 112,000 |
| Aerospace | 83,000 |
| Air transport | 75,000 |
| Railways | 52,000 |
| Pharmaceuticals | 41,000 |
| Steel industry | 31,000 |
| Coalmining | 7,000 |
| Fishing | 4,000 |

Seaside tourism figures are for England and Wales 2010-12; other figures are for GB

Sources: BRES and Sheffield Hallam estimates

BRES data from Office for National Statistics licenced under the Open Government Licence v.2.0

© Crown copyright

The important point to note is that, at an estimated 212,000, employment in the seaside tourist industry is comparable to employment in a number of major industries and greater than in several others. Employment in seaside tourism is broadly comparable to employment in telecommunications, for example, and greater than in the motor industry, aerospace, pharmaceuticals or steel.

Of course, in so far as the seaside tourist industry has a disproportionate share of part-time and low-wage jobs, these comparisons are flattering to the industry. In terms of the industry's contribution to national output it would not rank quite so highly. Even allowing for this factor, however, the comparisons show that seaside tourism is unquestionably a major industry in its own right.

The wider local economic impact

The estimates presented in this report concern the number of jobs *directly supported* by seaside tourism. More specifically, they are estimates of the number of jobs located in the resorts themselves in six specific sectors of the local economy. This does not, however, provide a fully comprehensive view of the impact of seaside tourism on local economies.

Table 9 repeats the speculative calculations on the wider impact first included in the 2010 report. The first line shows the 212,000 jobs estimated here to be supported directly by seaside tourism.

Table 9: Speculative estimates of the wider impact of seaside tourism on employment, England and Wales, 2012

| | no. of jobs |
|---|--------------------|
| Directly supported by seaside tourism | 212,000 |
| 'Missing' places | 20,000 |
| 'Missing' sectors | 10,000 |
| Supported by inland spend of seaside tourists | 10,000 |
| | <hr/> |
| DIRECT JOBS | 250,000 |
| Jobs in supply chain | 50,000 |
| | <hr/> |
| DIRECT + SUPPLY CHAIN JOBS | 300,000 |
| Multiplier effects | 300,000 |
| | <hr/> |
| DIRECT + INDIRECT JOBS | 600,000 |

Source: Sheffield Hallam estimates

To this headline total, the tourism jobs in the seaside locations not covered by the report need to be added. These are the very smallest seaside towns and villages (sub-1,500 population), isolated camping and caravan sites, other isolated tourist business along the coast, and the seaside tourism jobs in towns like Dover, Liverpool, Hull and Plymouth that are not covered by the report. These 'missing places' are individually unlikely to account for many seaside tourism jobs. Collectively, however, they may be a more important part of the jigsaw – 20,000 additional jobs might be a reasonable estimate, with a particular concentration in the far South West, where the coastline is very long and there are numerous small coastal settlements. These jobs are shown in the second line of the table.

Then there are the 'missing sectors' – those other parts of the local economy where jobs are likely to be supported directly by seaside tourism. A careful scrutiny of the fine detail of the government's Standard Industrial Classification suggests that these missing sectors are unlikely to be extensive but they will for example include jobs in local rail and bus services

supported by tourism (including Blackpool's famous seaside trams), in some health spas, in foreign language schools (which might be seen as a distinctive branch of seaside tourism in some South Coast towns in particular) and even in launderettes. A figure of 10,000 seems appropriate here.

The inland spend of seaside tourists also supports jobs, especially in places like Cornwall, Devon and North Yorkshire where inland tourist attractions (e.g. the Eden Project, North York Moors Railway, stately homes) can be an integral part of the seaside holiday package. In the light of the number of jobs estimated to be directly supported in the seaside towns themselves, a figure of 10,000 jobs may be appropriate here.

Adding in these other directly supported jobs brings the new total to around 250,000.

Then there are the jobs in the seaside towns that are indirectly supported by seaside tourism through the local supply chain. These are likely to be multiple and varied. The sale of ice cream to tourists, for example, may support a manufacturing facility in the town, and more generally wholesalers will support the local tourist-related retail trade. Hotels will draw on local laundry services, food and drink suppliers, tradesmen, banks and accountants. Parts of the building trade will directly serve tourist businesses. Within the public sector, policing, refuse collection and health services will to some extent need to be boosted to cope with visitor numbers. It is very difficult to put a reliable order of magnitude on these linkages and there is no hard data on which to base a judgement but a supply chain multiplier of 1.2 might not be unreasonable, in which case a further 50,000 jobs might be attributable to seaside tourism.

Finally, there are the wider multiplier effects. Beyond supply chain linkages, multipliers operate through a number of channels. One is through the spending of wages earned in the tourist sector, which supports further jobs in local consumer services. The more important effect is through migration: job opportunities attract residents, and the 200,000-plus jobs supported by seaside tourism mean that the population of seaside towns is a great deal higher than would otherwise be the case. Additional residents bring additional spending. In turn, key public sector funding formulas are driven by population numbers, so a higher population leads to more jobs in schools, hospitals and local government, and the wages of public sector workers support further jobs in local consumer services. In the modern economy these wider multiplier effects are substantial, not least because consumer services and the public sector now comprise such a large component of local economies. Once again there is no hard data on which to base a judgement. A multiplier of 2.0 might not be unreasonable, in which case a further 300,000 jobs in or around seaside towns would be supported indirectly by seaside tourism.

The speculative nature of these calculations must be emphasised. They do however suggest that the total number of jobs supported directly and indirectly by seaside tourism, in and around the seaside towns of England and Wales, could be as large as 600,000. This is far in excess of the directly supported jobs alone. Similar multiplier calculations could nonetheless be applied to other industries that underpin local economies, so there is nothing unique about seaside tourism in this regard.

There is yet another factor that probably applies more to seaside towns than other places. This is that seaside towns attract additional residents because people like to live there. Some of these are residents who commute to jobs elsewhere (a popular model in the South East of England). Others are in-migrant retirees. It is the character of the seaside towns themselves, which includes their role as tourist destinations, that often influences these choices. These in-migrants then underpin further jobs in local services. In so far as some of these migration flows can be attributed to the pull of a seaside tourist destination, the influence of tourism on the seaside economy might therefore be said to be still larger.

Taking this argument to its logical conclusion it could be argued that the only reason why some seaside towns exist at all is because of seaside tourism. It is certainly true that quite a number – Southport and Bournemouth are examples – were originally developed purely for seaside tourism rather than from a pre-existing coastal settlement. Following this logic, it could be argued that the *whole* of the employment in some of these places should be attributed to tourism.

This would however be a distortion. Over the years, other sectors have grown up alongside tourism so that the economies of the towns are no longer wholly dependent on this one sector alone. These days there are universities and colleges, hospitals, government offices, manufacturing firms and countless service sector businesses that support local jobs independently of seaside tourism. If the seaside tourism industry were to completely disappear overnight the towns themselves (and all their other employers) would not simply disappear, in the same way that mining communities did not vanish when their coalmines closed. There would be a painful period of downward adjustment that would leave seaside towns smaller in terms of jobs, population and incomes, but the towns themselves and a substantial proportion of the jobs within them would survive.

What the estimates presented in this report show is the extent to which jobs in seaside towns remain *directly dependent on seaside tourism*. What needs to be kept in mind is that in all the towns there will in addition be a further large tranche of jobs, difficult to determine in size, that depends *indirectly* on seaside tourism.

To illustrate this point, Table 10 presents calculations for the nine largest seaside towns/areas, each with a population of more than 100,000. These assume the same ratio of jobs supported in 'missing sectors', in the supply chain and by multiplier effects as in the national calculations earlier. It makes sense to apply these ratios only in the largest seaside towns. In smaller towns, and especially in the very smallest places, the supply chain linkages and multiplier effects are more likely to spill out into neighbouring areas and beyond.

Table 10: Speculative estimates of the wider impact of seaside tourism on employment, 2012 (Seaside towns/areas with population of 100,000+)

| | Jobs dependent on seaside tourism | | Direct & indirect as % of all jobs in town/area |
|---------------------|-----------------------------------|-------------------|---|
| | Direct | Direct & indirect | |
| Greater Blackpool | 15,900 | 40,000 | 35 |
| Greater Brighton | 15,200 | 38,000 | 23 |
| Greater Bournemouth | 13,300 | 33,000 | 18 |
| Torbay | 10,300 | 26,000 | 40 |
| Isle of Wight | 7,900 | 20,000 | 33 |
| Thanet | 3,800 | 10,000 | 23 |
| Hastings/Bexhill | 3,200 | 8,000 | 15 |
| Southend-on-Sea | 3,000 | 7,000 | 10 |
| Greater Worthing | 1,700 | 4,000 | 5 |

Source: Sheffield Hallam estimates

These local calculations are once again speculative but they perhaps begin to illustrate the full extent to which local economies depend on seaside tourism. In Greater Blackpool for example, the total number of jobs dependent on seaside tourism, directly or indirectly, may be of the order of 40,000. In Greater Brighton the number is 38,000, in Greater Bournemouth 33,000 and in Torbay 26,000. As a proportion of all jobs in the local economy the dependence on tourism also rises – in Greater Blackpool’s case, for example, to some 35 per cent. The remaining jobs in the local economy will be supported by income streams entirely unrelated to tourism – pensions, benefits, commuters’ incomes and non-tourist businesses selling goods and services outside the area.

The calculations for these larger seaside towns also illustrate the point that size alone (in terms of population) is not a very good guide to the significance of the tourism sector to the local economy. Whereas Blackpool, Torbay and the Isle of Wight all depend heavily on tourism, the economies of Southend and Worthing are clearly supported by a much wider range of income streams (including of course commuters into London) and markedly less dependent on tourism. These are differences which will be obvious to anyone with first-hand knowledge of the towns.

Implications of the findings

In recent years the view has become widespread that the British seaside tourist industry is in terminal decline. Since the rise of cheap air travel, the story goes, the British holidaymaker has turned his or her back on seaside resorts at home in favour of sunnier destinations further afield. This is consigning British seaside resorts to the scrap heap of history, it is usually assumed. This view is deeply entrenched in the media and is the starting point for so much political and cultural discussion about seaside towns and the issues they face.

Those who know Britain's seaside resorts have long been aware that this simplistic view is far from accurate. Our 2010 report did much to dispel the conventional wisdom, demonstrating that the seaside tourist industry in England and Wales remained very large, and in employment terms was actually tending to grow rather than decline. What the evidence presented in this new report shows is that despite the backdrop of economic austerity since 2008 the British seaside tourist industry remains very much alive and well. It has weathered the economic storm and, handled appropriately, should have a viable long term future too.

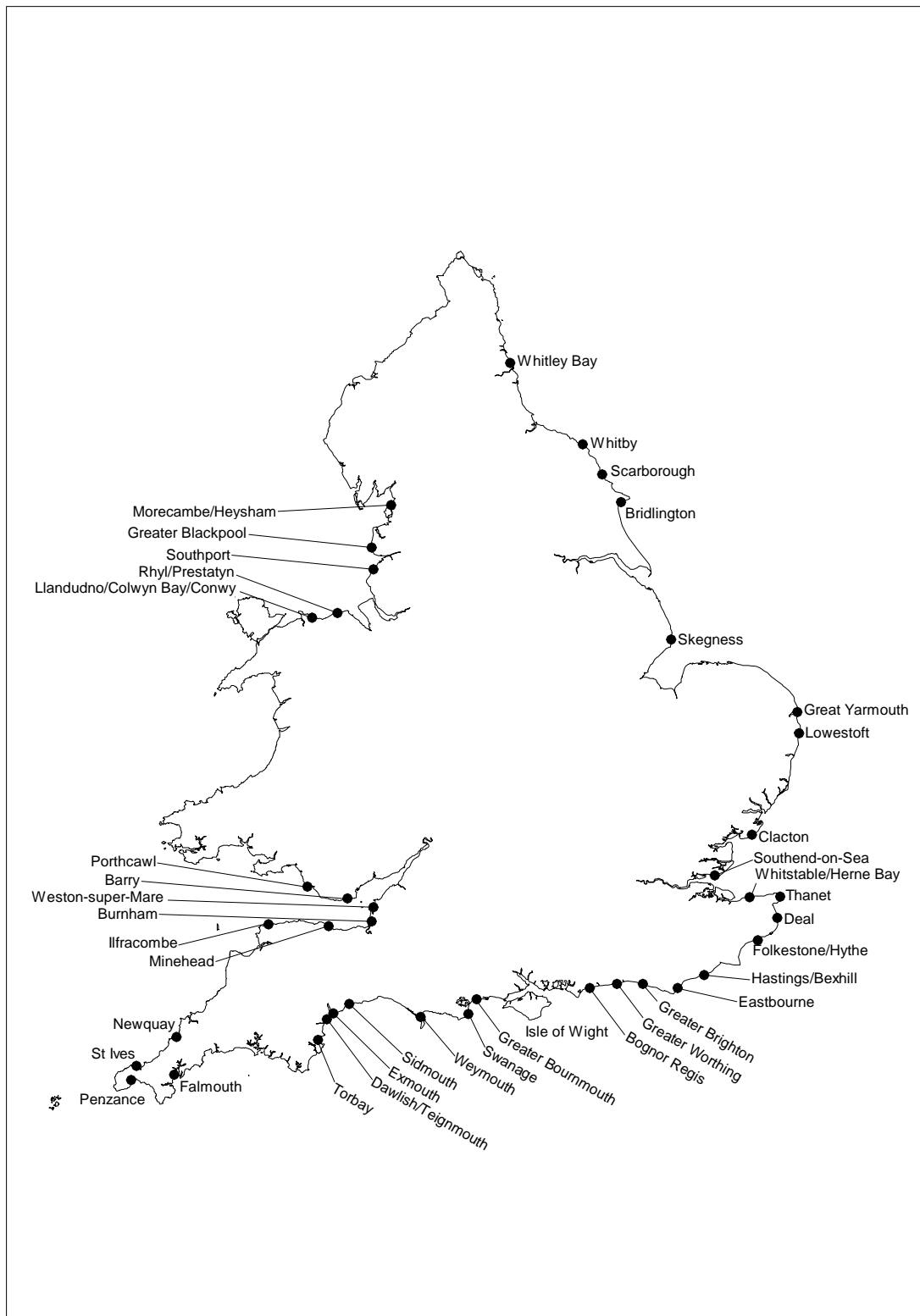
But this general conclusion, applicable to England and Wales as a whole, cannot be applied to all destinations. Buried in the detail there is clear evidence of important locational shifts. Blackpool – still Britain's premier seaside resort – has been shedding tourism jobs. Conversely, Brighton and the coastal towns of the South West seem to be advancing from strength to strength.

The locational shifts since 2008 are unlikely to be driven just by austerity – they are simply too large to be explained in these terms alone. Longer-term trends seem to be at work, though there is no reason to suppose that a linear continuation of recent trends is inevitable. The bucket and spade holidays of the 1950s and 60s, often the same week every year to the same place, are disappearing and unlikely ever to return. The market has become more sophisticated, more fragmented, and more diverse – but it is also shifting to different places.

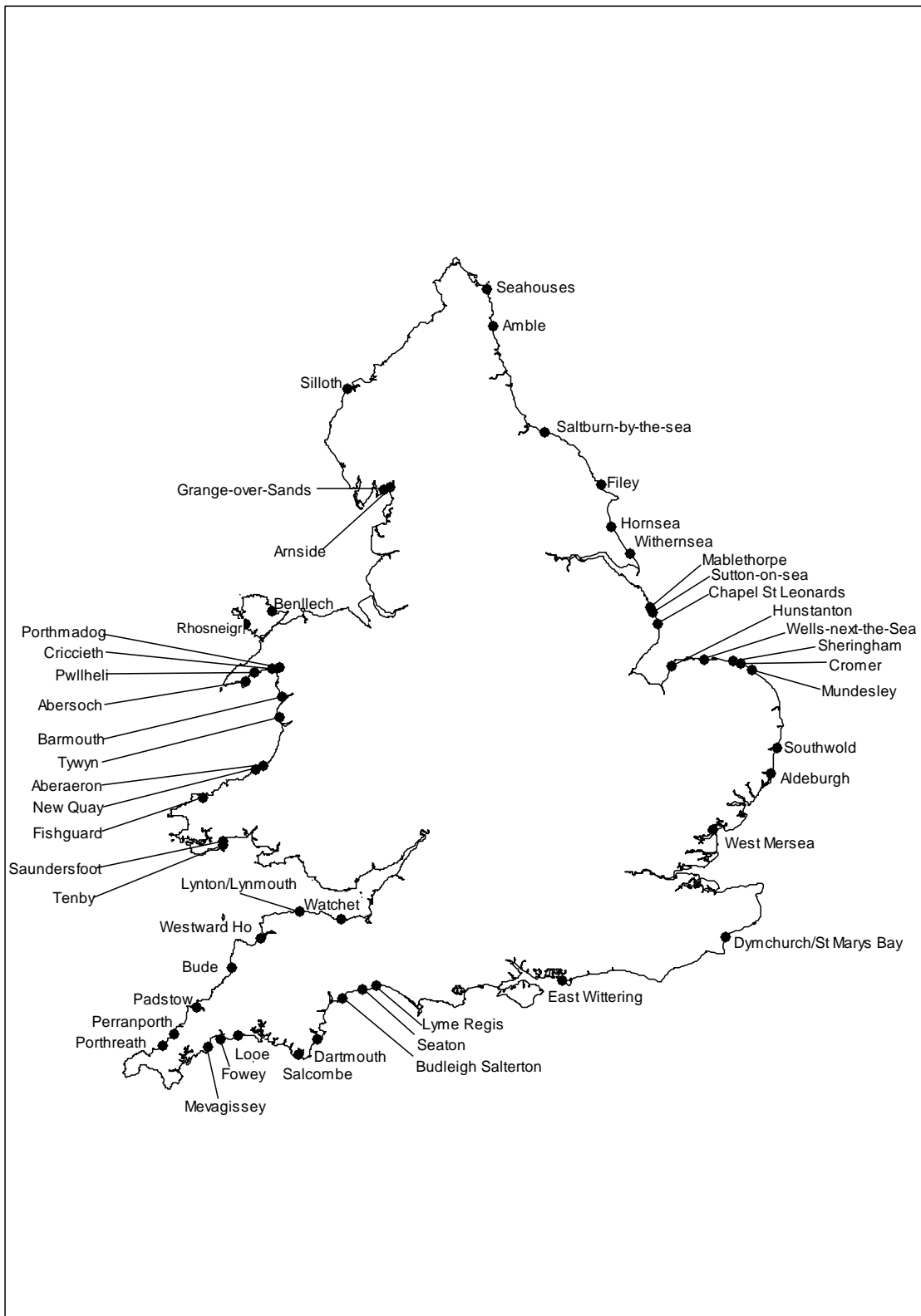
That a large seaside tourist industry has survived and adapted should be good news, not just for most seaside towns but also for UK plc. The challenge is now to ensure that the industry delivers its full potential in the coming years.

Appendix A: Location of seaside towns

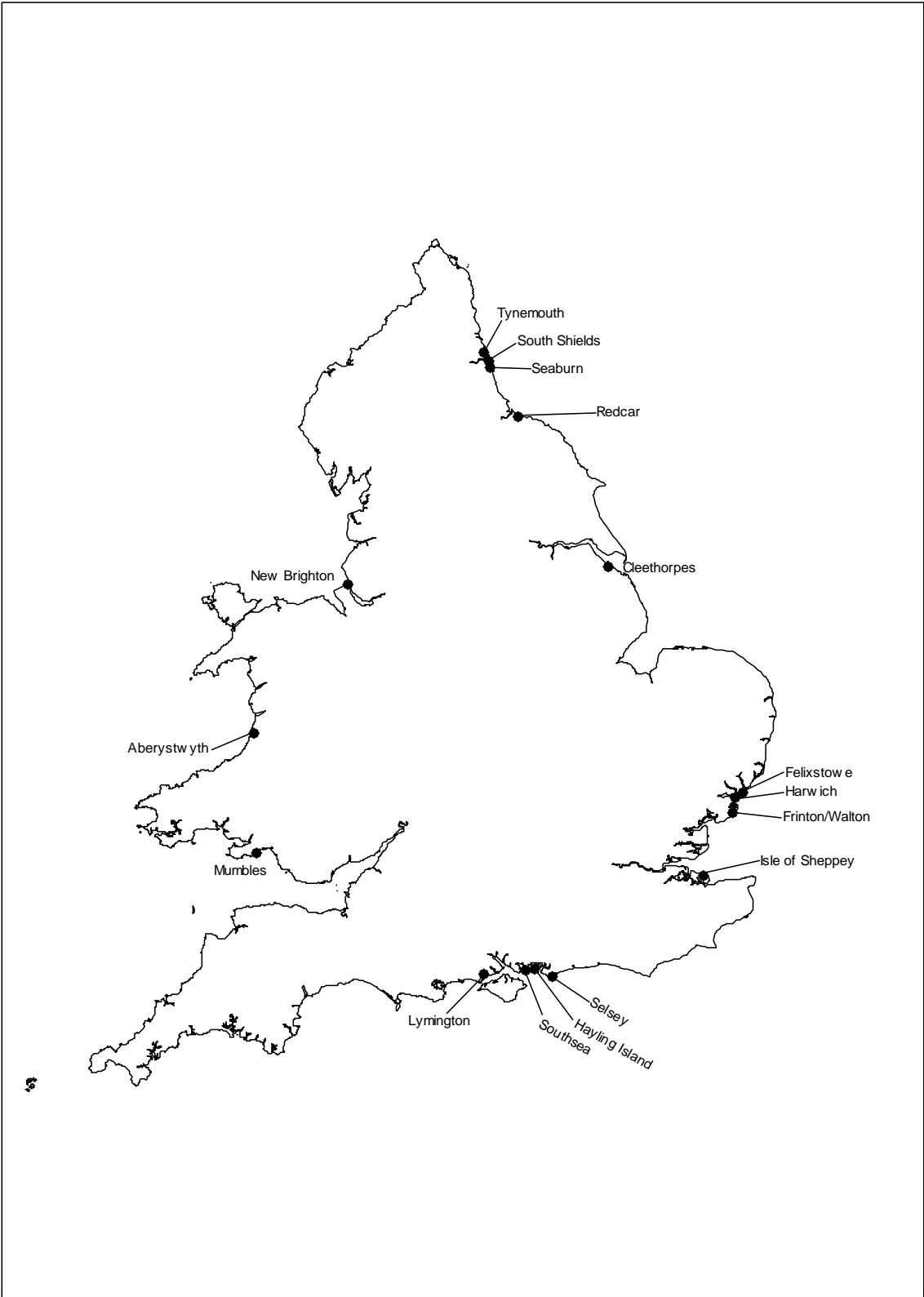
Principal seaside towns



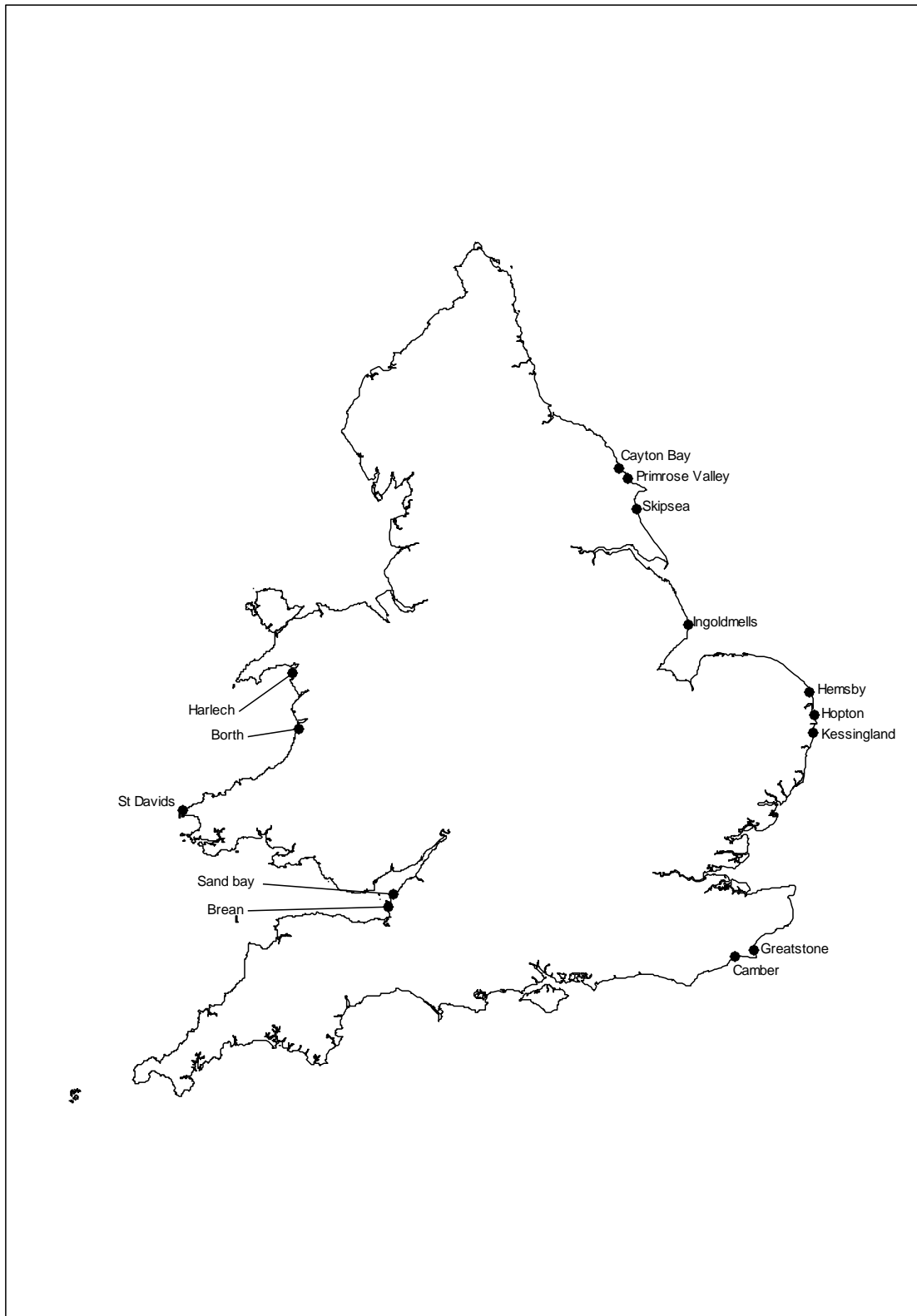
Smaller seaside towns



Other seaside destinations



Holiday parks



Appendix B: Comparator towns

CATEGORY A: *Large hinterland in relation to population*

Seaside towns: None

Comparator towns

| | | | | | |
|-----------|-----------|------------|----------------|------------|-------------|
| Ashford | Boston | Bridgnorth | Bury St Edm'ds | Carmarthen | Chelmsford |
| Devizis | Doncaster | Evesham | Harlow | Lichfield | Llantrisant |
| Maidstone | Northwich | Oakham | Oswestry | Preston | Swansea |
| Swindon | Taunton | Wakefield | Wigan | Yeovil | |

CATEGORY B: *Significant spending pull from surrounding areas*

Seaside towns

Aberystwyth Penzance

Comparator towns

| | | | | | |
|----------------|----------------|------------|------------|---------------|--------------|
| Andover | Aylesbury | Banbury | Barnsley | Basingstoke | Bedford |
| Bicester | Bishops S'ford | Braintree | Bridgend | Brighouse | Chesterfield |
| Chorley | Colchester | Crewe | Cwmbran | Darlington | Gloucester |
| Grantham | Gt Harwood | Huntingdon | Kettering | Kidderminster | Llanelli |
| Middlewich | Milton Keynes | Morpeth | Newark | Newbury | Northampton |
| Peterborough | Petersfield | Royston | Scunthorpe | Sleaford | Spalding |
| Stafford | Stevenage | Stone | Stroud | Sudbury | Tiverton |
| T'bridge Wells | Warrington | Whitchurch | Whitehaven | Wisbech | Worksop |

CATEGORY C: *Largely self-contained with some pull from neighbouring areas*

Seaside towns

Gtr B'mouth Gtr Brighton Lymington L'd/Conway/CB Minehead Scarborough
Skegness

Comparator towns

| | | | | | |
|--------------|-----------------|--------------|----------------|--------------|----------------|
| Accrington | Alton | Barrow | Bishop A'land | Buckingham | Burton on T |
| Caerphilly | Chard | Chippenham | Dereham | E Grinstead | Ebbw Vale |
| Gainsborough | Halifax | Hinckley | Hitchin | Huddersfield | Hull |
| Loughborough | Lutterworth | Macclesfield | Market H'boro | Melksham | Melton Mowbray |
| Newport (W) | Plymouth | Port Talbot | Redditch | Retford | Rugby |
| Selby | St Ives (Hunts) | Stoke on T | Stowmarket | Tamworth | Teesside |
| Thetford | Tonbridge | Uckfield | Wellingborough | Wrexham | |

CATEGORY D: *Modest loss of spending power to neighbouring town(s)*

Seaside towns

Eastbourne Folkestone/Hy Gt Yarmouth Gtr Blackpool Gtr Worthing Isle of Wight
Lowestoft Redcar Southend Southport Torbay Weston-s-M
Weymouth Whitby

Comparator towns

| | | | | | |
|--------------|-----------|-------------|----------------|----------------|------------|
| Aldershot | Ashington | Biggleswade | Blackburn | Blyth | Bromsgrove |
| Burnley | Cannock | Congleton | Consett | Corby | Coventry |
| Crediton | Daventry | Droitwich | Hartlepool | Horsham | Keighley |
| Leigh | Luton | Mansfield | Market Drayton | Merthyr Tydfil | Neath |
| Nelson/Colne | Ormskirk | Pontypridd | Sittingbourne | Skelmersdale | Spennymoor |
| St Neots | Wantage | Widnes | Winsford | | |

CATEGORY E: *Major loss of spending to neighbouring town(s)*

Seaside towns

| | | | | | |
|----------------|---------------|---------------|-------------|---------|------------------|
| Barry | Bognor Regis | Bridlington | Burnham | Clacton | Dawlish/T'mth |
| Deal | Exmouth | Falmouth | Felixstowe | Harwich | Hastings/Bexhill |
| Hayling Island | Ilfracombe | I of Sheppey | Morecambe/H | Newquay | Porthcawl |
| Rhyl/Prestatyn | Sidmouth | South Shields | St Ives | Swanage | Thanet |
| Whitley Bay | Whitstable/HB | | | | |

Comparator towns

| | | | | | |
|-------------|-----------------|-----------|-----------|-------------|---------|
| Aberdare | Brackley | Brynawr | Calne | Cramlington | Crook |
| Crowborough | Ellesmere Port | Faversham | Haverhill | Maesteg | March |
| Neston | Newton Aycliffe | Nuneaton | Peterlee | Rugeley | Runcorn |
| Rushden | Seaham | Sildon | Shepshed | | |

CATEGORY F: *Sub-areas of bigger built-up areas*

Seaside towns

| | | | | | |
|-------------|----------------|--------------|---------|---------|--------|
| Cleethorpes | Frinton/Walton | New Brighton | Mumbles | Seaburn | Selsey |
| Southsea | Tynemouth | | | | |

Comparator towns

Comparator set at two-thirds of the number of jobs per 10,000 residents, in the relevant sectors, in category E comparator towns

SMALLER SEASIDE TOWNS

Seaside towns

| | | | | | |
|---------------|--------------|----------------|---------------|------------|-----------------|
| Aberaeron | Abersoch | Aldeburgh | Amble | Arnside | Barmouth |
| Benllech | Bude | Budleigh S'ton | Chapel St Len | Criccieth | Cromer |
| Dartmouth | Dymchurch/SM | E Wittering | Filey | Fishguard | Fowey |
| Grange-over-S | Hornsea | Hunstanton | Looe | Lyme Regis | Lynton/Lynmouth |
| Mablethorpe | Mevagissey | Mundesley | New Quay | Padstow | Perranporth |
| Porthmadog | Portreath | Pwllheli | Rhosneigr | Salcombe | Saltburn |
| Saundersfoot | Seahouses | Seaton | Sheringham | Silloth | Southwold |
| Sutton | Tenby | Tywyn | Watchet | Wells | West Mersea |
| Westward Ho | Withernsea | | | | |

Comparator towns

| | | | | | |
|--------------|----------------|--------------|-------------|---------------|--------------|
| Bedlington | Caldicot | Cleator Moor | Dersingham | Easington Col | Egremont |
| Fortuneswell | Freckleton/W | Heacham | Holywell | Hoo St W'brgh | Kidwelly |
| Leiston | Llantwit Major | Loftus | Long Sutton | Lydd | Marske |
| Millom | Newbiggin | Neyland | Preesall | Skelton | Southminster |
| St Just | | | | | |

Source: Sheffield Hallam University

Appendix C: Average year-round employment directly supported by tourism by seaside town by sector, 2010/12

| | Retail | Hotels+Rest. | Transport, Campsites etc. | Recreation, Amusements etc | Total |
|------------------------|--------|--------------|---------------------------------|----------------------------------|--------|
| Greater Blackpool | 2,900 | 9,400 | 500 | 2,800 | 15,900 |
| Greater Brighton | 2,900 | 9,600 | 800 | 2,200 | 15,200 |
| Greater Bournemouth | 2,700 | 8,900 | 1,000 | 600 | 13,300 |
| Torbay | 1,900 | 6,200 | 1,000 | 1,200 | 10,300 |
| Isle of Wight | 1,200 | 3,900 | 1,700 | 1,200 | 7,900 |
| Newquay | 1,200 | 3,600 | 900 | 200 | 5,900 |
| Great Yarmouth | 1,800 | 1,300 | 1,300 | 1,100 | 5,400 |
| Llandudno/Colwyn/Conwy | 900 | 3,100 | 300 | 700 | 5,000 |
| Southport | 1,900 | 1,900 | 400 | 200 | 4,400 |
| Eastbourne | 1,700 | 2,300 | * | * | 4,000 |
| Weymouth | 800 | 2,000 | 700 | 300 | 3,900 |
| Scarborough | 800 | 2,500 | 100 | 400 | 3,800 |
| Thanet | 2,400 | 1,300 | 100 | * | 3,800 |
| Cleethorpes | 400 | 1,500 | 700 | 700 | 3,200 |
| Hastings & Bexhill | 1,500 | 900 | 700 | 100 | 3,200 |
| Southend-on-Sea | 400 | 1,200 | * | 1,400 | 3,000 |
| Weston-Super-Mare | 1,300 | 1,100 | 200 | 400 | 2,900 |
| Skegness | 900 | 900 | 600 | 500 | 2,800 |
| St Ives | 600 | 1,900 | 200 | 200 | 2,800 |
| Ingoldmells | 200 | 400 | 2,000 | 300 | 2,800 |
| Southsea | 600 | 1,300 | * | 600 | 2,600 |
| Falmouth | 600 | 1,700 | 100 | 200 | 2,600 |
| Minehead | 400 | 400 | 1,600 | 100 | 2,500 |
| Bognor Regis | 400 | 300 | 1,600 | * | 2,300 |
| Bridlington | 800 | 900 | 300 | 200 | 2,300 |
| Morecambe/Heysham | 1,200 | 700 | 200 | * | 2,200 |
| Folkestone/Hythe | 800 | 1,200 | 100 | 100 | 2,100 |
| Clacton | 1,500 | 100 | 500 | * | 2,100 |
| Tenby | 500 | 1,000 | 400 | 200 | 2,000 |
| Sidmouth | 800 | 1,100 | 100 | * | 1,900 |
| Exmouth | 300 | 1,000 | 500 | 100 | 1,900 |
| Dawlish/Teignmouth | 200 | 800 | 800 | * | 1,900 |
| Whitby | 500 | 1,100 | 100 | 200 | 1,900 |
| South Shields | 500 | 1,000 | * | 300 | 1,800 |
| Lowestoft | 100 | 300 | 1,200 | 100 | 1,700 |
| Greater Worthing | 400 | 1,200 | 100 | 100 | 1,700 |
| Bude | 900 | 500 | 200 | 100 | 1,700 |
| Rhyl/Prestatyn | 600 | * | 600 | 300 | 1,600 |
| Padstow | 500 | 900 | 100 | 100 | 1,600 |
| Penzance | 300 | 1,000 | 200 | 100 | 1,600 |
| Dartmouth | 600 | 800 | * | 100 | 1,500 |
| Kessingland | 600 | 100 | 500 | 200 | 1,400 |
| Brean | 100 | 200 | 700 | 500 | 1,400 |
| Porthcawl | 200 | 600 | 500 | 100 | 1,400 |
| Hunstanton | 600 | 300 | 300 | 200 | 1,300 |
| Redcar | 800 | 400 | 100 | * | 1,300 |
| Hayling Island | * | 300 | 900 | 100 | 1,300 |
| Lymington | 400 | 400 | 100 | 300 | 1,200 |

| | Retail | Hotels+Rest. | Transport, Campsites etc. | Recreation, Amusements etc | Total |
|----------------------|--------|--------------|---------------------------------|----------------------------------|-------|
| Mumbles | 100 | 1,000 | * | 100 | 1,200 |
| Aberystwyth | 300 | 400 | * | 500 | 1,200 |
| Cromer | 800 | 300 | * | 100 | 1,200 |
| Porthmadog | 600 | 300 | 200 | 100 | 1,200 |
| Ilfracombe | 200 | 600 | 300 | 100 | 1,100 |
| Hopton | 200 | * | 900 | * | 1,100 |
| Swanage | 300 | 500 | 200 | 100 | 1,100 |
| Whitley Bay | 400 | 500 | 100 | * | 1,100 |
| Looe | 400 | 600 | * | * | 1,100 |
| Lyme Regis | 300 | 600 | 100 | 100 | 1,100 |
| New Brighton | 300 | 500 | * | 100 | 1,000 |
| Burnham | 500 | 100 | 400 | 100 | 1,000 |
| Salcombe | 300 | 500 | 100 | 100 | 1,000 |
| Felixstowe | 400 | 100 | 300 | 200 | 1,000 |
| Seaburn | 500 | 500 | * | * | 1,000 |
| Whitstable/Herne Bay | 300 | 400 | 200 | * | 900 |
| Aldeburgh | 200 | 600 | * | 100 | 900 |
| Mablethorpe | 300 | 100 | 400 | 100 | 900 |
| Camber | 100 | 100 | 600 | 100 | 800 |
| Hemsby | 100 | 200 | 300 | 200 | 800 |
| Southwold | 300 | 300 | * | 100 | 800 |
| Frinton/Walton | 400 | 100 | 100 | 100 | 800 |
| Pwllheli | 600 | 100 | 100 | * | 800 |
| Primrose Valley | 100 | * | 600 | 100 | 700 |
| Fowey | 200 | 400 | 100 | * | 700 |
| Selsey | * | 200 | 500 | * | 700 |
| Lynton/Lynmouth | * | 400 | 300 | * | 700 |
| St. Davids | 200 | 300 | 100 | 100 | 700 |
| Tynemouth | * | 600 | * | * | 700 |
| Grange-over-sands | 100 | 400 | 100 | * | 600 |
| Seahouses | 100 | 400 | 200 | * | 600 |
| Sheringham | 200 | 100 | * | 200 | 600 |
| Hornsea | 300 | 100 | 100 | 100 | 600 |
| Abersoch | 100 | 300 | 100 | * | 600 |
| Cayton Bay | * | 100 | 400 | * | 600 |
| Isle of Sheppey | * | * | 500 | * | 500 |
| Wells-next-the-sea | 100 | 300 | * | 100 | 500 |
| Harwich | * | 100 | 300 | * | 500 |
| Perranporth | 200 | 300 | * | * | 500 |
| Saundersfoot | 100 | 300 | 100 | * | 500 |
| Barmouth | 300 | 200 | * | * | 500 |
| Aberaeron | 100 | 200 | * | * | 400 |
| Saltburn-by-the-sea | 100 | 200 | * | * | 400 |
| Skipsea | * | * | 300 | * | 400 |
| Seaton | 300 | 100 | * | * | 400 |
| Filey | 100 | 200 | 100 | * | 400 |
| Westward Ho | 100 | 100 | 100 | * | 400 |
| Fishguard | 100 | 100 | 100 | * | 400 |
| Sand Bay | * | 100 | 300 | * | 400 |
| Mevagissey | 100 | 200 | * | * | 300 |

| | Retail | Hotels+Rest | Transport, Campsites etc. | Recreation, Amusements etc | Total |
|--------------------|--------|-------------|---------------------------------|----------------------------------|-------|
| Chapel St Leonards | 100 | 100 | 200 | * | 300 |
| Portreath | 100 | 100 | 100 | * | 300 |
| New Quay | * | 100 | 200 | * | 300 |
| Borth | * | * | 200 | * | 300 |
| Silloth | * | 100 | 200 | * | 300 |
| Amble | * | 100 | 100 | * | 300 |
| Withernsea | * | * | 100 | 100 | 200 |
| Harlech | * | 100 | * | 100 | 200 |
| East Wittering | 200 | 100 | * | * | 200 |
| West Mersea | 200 | * | * | * | 200 |
| Greatstone | * | * | 100 | * | 200 |
| Criccieth | * | 200 | * | * | 200 |
| Arnside | * | * | 200 | * | 200 |
| Deal | * | 100 | * | * | 200 |
| Benllech | * | 100 | 100 | * | 200 |
| Tywyn | 100 | * | * | * | 200 |
| Budleigh Salterton | 100 | * | * | * | 200 |
| Dymchurch/St Marys | * | * | 100 | * | 100 |
| Sutton | * | 100 | * | * | 100 |
| Barry | * | * | 100 | * | 100 |
| Rhosneigr | * | * | * | * | * |
| Mundesley | * | * | * | * | * |
| Watchet | * | * | * | * | * |

* below 100

Source: Sheffield Hallam estimates based on BRES

BRES data from Office for National Statistics licenced under the Open Government Licence v.2.0

© Crown copyright

Sheffield Hallam University
Unit 10, Science Park
City Campus
Howard Street
Sheffield S1 1WB

+44 (0)114 225 3073

e: crsr@shu.ac.uk

w: shu.ac.uk/crsr

ISBN: 978-1-84387-374-7

