Arsyllfa **Wledig** Cymru
Wales **Rural** Observatory

SMALL AND MARKET TOWNS IN RURAL WALES AND THEIR HINTERLANDS

Research Report 13

February 2007

Noddir gan Llywodraeth Cynulliad Cymru
Sponsored by Welsh Assembly Government

Cardiff University
Prifysgol Caerdydd

Prifysgol Cymru Aberystwyth 1872 The University of Wales

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CHAPTER ONE: INTRODUCTION

Small and Market Towns in Rural Wales

1.1 Small towns and market towns are a notable feature in the geography of rural Wales. Their significance is extenuated by the concentration of Wales's major urban areas along the north and south coasts and by the relatively low population density of rural Wales. From Llanelli and Cwmbran in the south to the Llandudno-Prestatyn urban area along the North Wales coast extends an area of more than 1.5 million hectares in which there is no urban area with a population of over 20,000 people. This marks out rural Wales as significantly different to rural England, where most rural communities are within easy travelling distance of at least a medium-sized town, and places additional demands on the towns within rural Wales. Thus, larger towns such as Aberystwyth, Bangor, Carmarthen and Haverfordwest fulfill a role as regional or sub-regional centres that in other contexts would normally be associated with towns of 50,000 population or more. Similarly, there are within rural Wales a large number of settlements of fewer than 2,000 residents that have historically been regarded as towns and which continue to act as service centres for their surrounding rural areas.

1.2 Small and market towns should be recognized as a distinctive category in the geographical structure of Wales. Although small and market towns are often 'lost' within broader-brush categorizations of 'rural' and 'urban' areas (especially when these are defined at local authority level), they differ significantly from both. Small and market towns differ from the more extensive urban areas of North East Wales and South Wales and the Valleys in their relative isolation, their enhanced service function compared to population, the spatial compactness of their territories and their interactions with the surrounding rural areas. Yet, they also differ from rural communities in that they can support a larger number of services and amenities, often have a broader economic base and can be large enough to exhibit typically 'urban' physical features and social characteristics. At the same time, small and market towns are inextricably connected to both larger urban areas and rural areas through a tangled web of social and economic flows, networks and interactions.

1.3 However, the small and market towns of rural Wales do not form a homogenous category. As employed in this study, the description 'small or market town' is applied to settlements with populations ranging from fewer than a thousand residents to over fifteen thousand residents. The towns vary significantly in the number and type of services they host, and the extent of the surrounding territory that they serve. They have differing economic structures and population structures. Some have experienced rapid population growth and economic growth in recent years, others have experienced decreases in employment and limited population change. The towns are also the product of different historical trajectories. Many towns included in this study can be correctly identified as 'market towns' in the historical sense, having developed as the economic trading centres for their district; yet others did not historically play this role, but developed as industrial or port towns.

1.4 The objectives of this study were to examine the distinctive characteristics of small and market towns in rural Wales, compared with larger urban and rural areas within the region; and to explore the social and economic interactions between small towns and their neighbouring communities. The research investigates both the 'economic footprint' of small and market towns, examining relations of employment and business transaction to establish degrees of economic integration of towns with surrounding areas; and the 'social footprint', examined in terms of the use of social infrastructure in towns by residents of their hinterlands. As such, the project aims to address issues of whether economic and social investment in small and market towns 'trickles-out' to surrounding communities, and to identify a typology of different models of town-hinterland interaction that might be employed in developing future strategies for regeneration in rural Wales.

1.5 The research has been driven around five key questions:

- How do the social and economic characteristics of small and market towns compare with those of other parts of rural Wales?
- How does recent social and economic investment in small and market towns compare with that elsewhere in rural Wales?
- To what extent are small and market towns integrated with their hinterlands through economic interactions?
- To what extent are small and market towns integrated with their hinterlands through social interactions?
- Is it possible to identify different models of small and market town interaction with their hinterland?

1.6 These questions have been addressed through a two-part research process. Part one of the research has focused on the analysis of secondary data, both at an aggregate level for rural Wales and for a sample set of 44 small and market towns. This analysis has primarily addressed questions 1 and 2, but has also partially addressed questions 3, 4 and 5. Part two of the research involved case studies of five towns and combines further detailed analysis of secondary data with collection and analysis of primary data through surveys and interviews. The case study research is primarily aimed at questions 3 and 4, but also extends the analysis of question 2 and will confirm the provisional answer for question 5 produced from the part one research. More details of this research strategy are given in the methodology section below.

The Policy Significance of Small and Market Towns

1.7 The importance of small and market towns has long been recognized in policy for rural Wales. The economic development strategy pursued by the

Development Board for Rural Wales during the 1970s and 1980s employed a graded hierarchy of market towns to deliver growth pole development across Mid Wales, with Newtown in particular identified as centre for industrial development and expansion and industrial facilities developed in other towns in order to stabilise their local economies (Edwards et al., 2003). Planning policies also tended to identify small and market towns as growth poles – settlements in which economic and residential development was concentrated - although some councils did attempt to encourage more dispersed economic investment and housing growth was often promoted in satellite villages around towns. The rationalisation of public services in rural Wales, particularly following local government re-organisation in 1974, additionally reinforced the service function of small and market towns and acted as a stimulus for growth in those towns that were selected as the administrative centres for the new district and county councils.

1.8 The shift in emphasis in economic development policy during the 1980s and 1990s towards the promotion of endogenous development retreated from the 'growth pole' model but nonetheless remained focused on small and market towns. Many of earliest community regeneration initiatives in rural Wales originated in small towns, for example Antur Teifi in Newcastle Emlyn, and the approach was promoted by the Welsh Development Agency through the establishment of several Rural Action Areas, focused on small and market towns, in the late 1980s (Edwards, 1998; Edwards et al., 2003).

1.9 The emphasis on small and market towns as the pivots of community-led regeneration in rural Wales was reiterated in the 1996 Rural White Paper, *A Working Countryside for Wales* (Welsh Office, 1995), which was followed by the establishment of the Market Town Initiative by the Development Board for Rural Wales in 1996 (Edwards et al., 2000, 2003). The Market Town Initiative had the twin aims of stimulating local social and economic development and of fostering community involvement in the regeneration process. Grants of up to £90,000 of revenue funding over three years were awarded in two tranches to initiatives based in ten towns in Mid Wales. The Market Town Initiative envisaged that development in the towns would benefit the wider rural area in which they were located and several of the partnerships funded included neighbouring rural communities as well as the town itself.

1.10 More recently, small and market towns in Wales have benefited from a range of different initiatives. In some cases these have been directed towards specific towns facing particular economic challenges, notably the regeneration programmes developed for Cardigan, Fishguard and Llanidloes. In other cases small and market towns have benefitted from initiatives that have not necessarily been exclusively focused on small towns. For example, the Small Town and Village Initiative, pioneered by the North Wales region of the Welsh Development Agency (WDA) and subsequently extended across Wales following the amalgamation of DBRW into the WDA in 1999, provided support not only for small towns but also for significant villages and other 'well defined rural areas', and has since been replaced by a more generic community 'tool-kit' approach. Similarly, the Communities First programme run by WAG, meanwhile, has included several small towns among its recipients, but is targeted at deprived wards across rural, urban and small town areas, not at small towns specifically. As such the emphasis in recent policy in Wales has been on integrated programmes from which small and market towns have been able to gain support, rather than on targeting small and market towns as a distinctive and separate type of locality.

1.11 The Wales Spatial Plan provides a new framework within which the significance of small and market towns might be positioned. It acknowledges the role of smaller towns as service centres in two regions, Central Wales and Pembrokeshire, and its propositions and actions for these regions include points specifically relating to small and market towns. In Central Wales it proposes that "the current mosaic and scale of towns needs to be reinforced, enhancing their attractiveness as places in which to live and work creatively, while improving links with surrounding rural communities, building a network of complementary regional and local centres" (WAG 2004, p. 46). As such it recommends that local partners lead a study to "determine future roles, development and investment needs of towns and hubs" (ibid., p 47) and specifically identifies the regeneration of Cardigan as an action point. In Pembrokeshire, the Spatial Plan proposes that "rather than concentrating development on one town, or duplicating activities in a number of areas, the network of towns should offer complementary functions" (ibid., p 57), and identifies actions for Milford Haven, Pembroke, Haverfordwest and Fishguard. However, the Spatial Plan does not ascribe any particular role to small and market towns beyond these regional contexts.

1.12 In the wider context of the United Kingdom, Wales may be argued to have set a lead in placing an emphasis on small and market towns as the focal points for rural regeneration through programmes such as DBRW's Market Town Initiative. Indeed, there is significant evidence of 'borrowing' from Wales in the development of initiatives in England targeted at small and market towns from 2000 onwards. The Rural White Paper for England in 2000 included a chapter dedicated to market towns, noting that "market towns play a critical role in helping rural communities to thrive and in regenerating deprived areas" (DETR/MAFF 2000, p. 74). The chapter continued to outline the contribution of market towns to rural England as foci for economic development and regeneration; centres that meet people's needs for access to a wide range of retail, professional and public services; foci for properly planned and coordinated public transport; and 'distinctive places to live' with a potential to act as centres of cultural activity.

1.13 The principles set out in the 2000 Rural White Paper for England have subsequently been implemented through initiatives by both national and regional agencies. These include the 'Market Town Healthcheck' developed by the Countryside Agency as means by which towns can assess their own needs and those of their hinterlands; as well as Market and Coastal Town Initiatives run by the regional development agencies and funded through the Single Regeneration Budget (Edwards et al., 2003). Additionally, a new organisation, Action for Market Towns, has helped to give small and market towns a distinctive voice in the rural policy arena in England. Although membership of Action for Market Towns is open to towns in Wales, only two Welsh towns are currently members, Abergavenny and Buckley.

1.14 All of these policies, however, reflect a twin rationale for intervention in small and market towns. First, there is the purpose of addressing the particular needs of the small town communities themselves. These may include problems that are arguably symptomatic of the small town condition, including responding to the closure of major employers or the challenges faced by local retailers against competition from larger towns or supermarkets, which may be most appropriately addressed through targeted initiatives. They may also include tackling problems of social exclusion and deprivation that are evident in many small towns, but which are also found in larger urban areas and which may be most appropriately addressed by including small towns within broader programmes. Secondly, there is the purpose of addressing the problems of wider rural areas by taking action in small towns, following the principle that the benefits will 'trickle-out' to surrounding rural communities (Edwards et al., 2003). Hence, policy for small and market towns is premised on a number of assumptions about the nature of small towns and about their interactions with their hinterlands, which this study aims to interrogate.

Previous Research on Small and Market Towns

1.15 The assumption that investment in small and market towns can act as a driver for economic growth in wider rural areas was explored by the 'Dynamic Smaller Towns: Identification of Critical Success Factors' report presented to the Welsh Assembly Government in 2004 (Brown et al., 2004). The research, undertaken by the University of the West of England with Roger Tym and Partners, was commissioned to "identify those factors that have played a causal role in the success of prospering small towns and helped to spread economic opportunities to their surrounding communities and to assess the scope for policies to replicate that success elsewhere" (ibid., para 1.1).

1.16 The research involved an aggregate secondary data analysis of 369 small towns and 55 residual rural areas across England and Wales, focusing on three measures of economic performance: change in unemployment, employment change in sectors outside agriculture, and change in the number of dwellings. A second stage of the study conducted a comparative analysis of secondary data for a sample of 24 case study towns, including eleven towns in Wales, complemented by interviews with key informants in the case study towns.

1.17 This analysis found that employment growth was stronger in the residual rural areas than in the small towns and that falls in unemployment had also been slightly faster in the rural areas. In contrast, it found that housing growth was faster in the small towns than in the residual rural areas. Additionally, the case study analysis revealed there to be a significant variability in the performance of different towns.

1.18 From this analysis, the Dynamic Smaller Towns report concluded that most small towns and rural areas are performing well, but with significant differences between individual towns; that in general rural areas surrounding towns are growing more rapidly than the towns in terms of jobs, but housing growth is greater in the towns; that the prosperity of towns is not simply a function of economic growth, but is affected by housing market processes; and that population growth in the wider district is a key factor, linked to job growth in the residual rural area.

1.19 As such, the report questions the assumption that small towns are the drivers of economic change in their surrounding rural areas. It argues that the question should be reframed in terms of the context of both towns and rural areas, suggesting that economic growth in rural communities can drive population growth in small towns and that variation between towns reflects broader sub-regional factors.

1.20 The Dynamic Smaller Towns report provides a useful foundation for the present study, but we would contend that it raises more questions than it answers about the nature of small town – hinterland interactions. It has also been noted that the delimitation of town areas based on administrative boundaries used in the report excluded some significant employment sites, such as the Llandygai Industrial Estate in Bangor. As such, some of the observed job growth in the surrounding rural areas may have been town-fringe growth.

1.21 The present study builds on the Dynamic Smaller Towns report in three ways. Firstly, in expanding the range of indicators examined, and in particular by analysing employer reach and (in the case studies) supplier base and customer base, we are able to constuct a more detailed picture of economic interactions between a small town, its hinterland and areas further afield. Secondly, in extending the focus of the study to include the social interactions between small towns and their hinterlands, we recognise that the contribution of small towns to rural regeneration is not purely economic. Thirdly, in aiming to propose a typology of small towns we intend to develop understanding of the uneven geographies of small town regeneration.

1.22 In developing our approach we have also been informed by other previous research on small and market towns in Britain. In contrast to countries such as Australia, New Zealand and the United States, research on small towns in Britain has been limited, caught in the gap between the academic fields of urban studies and rural studies. Although small towns have formed the setting for a wide range of social research, particularly within the field of rural geography, few of these studies have explicitly engaged with the specificities of the small town situation. Exceptions include Jones (2002), whose work in North Wales documented small town tensions between 'local' youth and in-migrants; and Edwards et al. (2001 and 2003) who explore the dynamics of partnership working and participation in the DBRW Market Town Initiative and the involvement of neighbouring communities in small town regeneration partnerships.

1.23 Research on the economic interactions between small towns and their rural hinterlands is arguably an even more limited field. However, three previous studies have informed the development of the present study. Firstly, research by Powe and Shaw (2004) has explored the current and future role of market towns in servicing their hinterlands through a case study of Alnwick in Northumberland. They revealed a complex pattern of interactions, with virtually all respondents in the rural hinterland visiting Alnwick for shopping or services during the previous month, but nearly half visiting the regional centres of Newcastle and Gateshead for their main non-food shopping. They identify the presence of a supermarket as the major draw for shoppers to Alnwick and suggest that facilities such as the theatre are more likely to be used by residents from the rural hinterland who are also visiting the town for other purposes, but also identify inadequacies with the quality and range of shopping in the town, difficulties of car parking and limited public transport as key factors for residents in the rural hinterland choosing to travel to other centres for shopping and services. As such, Powe and Shaw conclude that there is a mutual dependence between the town and hinterland residents but that the continuation of the relationship depends on market towns taking advantage of recent demographic trends, particularly by 'clawing back' trade by offering a higher quality shopping environment and by extending the sense of belonging beyond the boundaries of the town.

1.24 Secondly, research carried out by Land Use Consultants with SERRL and Emma Dewlow for the Countryside Agency (LUC 2004) has explored the extent to which market towns function as service centres in rural areas. The research focused on mapping the spatial patterning of service use by both households and businesses in different 'rural situations'. Drawing on existing national data and case studies of eight market towns and their hinterlands, the authors of the study concluded that whilst market towns in general played an important service role for households and businesses, other urban centres also played significant service roles. Consequently, any "notion of a market town as a unified 'service centre' for a notional hinterland appears particularly naive in the light of this research'. In particular, the authors of the report suggested that hinterland residents were significantly less 'attached' to market towns than supposed by current policy.

1.25 The report argued that market towns generally served as key service centres for main food, top up and convenience shopping, but were far less important for other sorts of shopping, with nearby large towns and other urban centres serving as significant 'competing attractions' for the residents of rural hinterlands. However, use of financial and professional services by hinterland residents centred on market towns rather than larger urban centres. Market towns were also important centres for socialising, but less important for other leisure activities. Most rural businesses looked to market towns as the main source of food, office and janitorial supplies and professional services, but looked more to regional and national suppliers for other types of supply and production inputs. For many rural businesses, the local market town provided the majority of their work, but regional and – in particular – national markets were also important. Alongside these general conclusions, the research also emphasised that "the eight case study areas all showed sufficient difference from one another to suggest that classifications of towns should be approached with great care".

1.26 Thirdly, research by Courtney and Errington (1999 and 2000) has examined the spatial pattern of economic transactions between small towns and their hinterlands. By tracing the flows of inputs and outputs for businesses in two case study towns, Kingsbridge in Devon and Olney in Buckinghamshire, they mapped the 'economic footprints' of the towns and calculated the degree of integration of the towns and their hinterlands. These showed that economic transactions between firms, suppliers and households in the towns and their hinterlands were relatively limited, with firms in both towns and both hinterlands sourcing over 80% of their supplies from outside the area. In terms of sales, however, Kingsbridge demonstrated significantly greater integration than Olney, with Kingsbridge and its hinterland accounting for around 30% of sales revenue for firms in the town and 45% of sales revenue for firms in the hinterland, whereas Olney and its hinterland accounted for only 8% of sales revenue for firms in the town, and 3% for firms in the hinterland (Courtney and Errington 1999). This differing integration, Courtney and Errington argue, reflects sectoral differences and hence points towards different strategies for optimum local economic growth. In Kingsbridge, they suggest, local ownership is important and policies that encourage independent service based firms would maximise local income generation, whereas in Olney investment targeted at consumer service firms would produce the greatest return.

1.27 Finally, research by Thomas and Bromley (2002) on the relationship between retailing in Llanelli town centre and out-of-town retailing, should also be noted. Although Llanelli is not a small town as defined in the present study, Thomas and Bromley's research provides useful evidence of the impact on smaller town centres of the expansion of out-of-town shopping centres as well as of the potential for regeneration projects to halt decline and attract back some trade.

Methodology and Data Sources

1.28 The research for this study has employed both primary and secondary data and has been undertaken in two parts, as noted earlier. Part one of the research has primarily involved secondary data analysis and forms the evidence base for chapters two to five of this report. Part two involved case study research in five towns and includes further analysis of secondary data and the collection and analysis of primary data using a telephone questionnaire survey and interviews. The case study research is reported in chapter six.

1.29 The secondary data analysis has involved four scales of analysis as appropriate to the data concerned. Firstly, data available at aggregate local authority level has been used to compare urban, town and fringe, and village and countryside areas across rural Wales (see chapter 2 for further discussion of categories). Secondly, ward level data has been aggregated to compare small town, larger urban and rural areas within local authority areas and across rural Wales. Thirdly, ward level data has also been used to compare the characteristics of the 81 small and market towns listed in appendix A (see also chapter 2). Fourthly, output area data has been employed for a more detailed analysis of a sample of 44 small and market towns (listed in appendix B) and for comparison with their hinterlands.

1.30 Secondary data has been collated from a number of sources including the 2001 Census, the 2004 Counts of Enterprises and Local Units for CAS Wards,[1] the Wales European Funding Office database of awards, and the National Lottery Charities Board database of awards. Details of each of these data sources are given below.

1.31 Data from the 2001 Census has been accessed through the Office of National Statistics Neighbourhood Statistics website for the following indicators and employed in analysis at the spatial scales listed:

- Resident population (output area, ward, local authority)
- Population turnover (ward)
- Mean age (ward)
- Distribution of age structure (output area, ward)
- Workplace population (output area, ward, travel-to-work area)
- Working population (output area, ward, travel-to-work area)
- Distance traveled to work (output area, ward)

1.32 Additionally, population growth has been analysed by comparing resident population data for the 1981, 1991 and 2001 Census at the community scale.

1.33 Data from the 2001 Census published by the Office for National Statistics at a local authority level for the new rural-urban area classifications has also been employed in the analysis of population and employment patterns.

1.34 Analysis of the distribution of businesses in rural Wales has employed data from the 2004 Counts of Enterprises and Local Units for CAS Wards collated by the Office of National Statistics from the Inter-Departmental Business Register. This data relates to VAT registered units only and has been analysed for this study at the ward level including indicators of broad industry group. Data aggregated to local authority level for rural and urban areas by the Office of National Statistics has been used in the analysis of enterprise size.

1.35 Data on ERDF approved grants made under the Objective 1 and Objective 2 programmes in rural Wales has been collated from the database of awards maintained by the Wales European Funding Office (WEFO). This data has been classified by area type (small town/ urban and fringe / rural) on the basis of information contained in the database, defining small towns as listed in appendix A and using the ONS rural-urban classification of wards for all other areas.

1.36 Data on grants received from the National Lottery Charities Board or the Community Fund has been collated from the database of awards maintained by the Community Fund. This data has been classified by area type (small town/ urban and fringe / rural) on the basis of information contained in the database, defining small towns as listed in appendix A and using the ONS rural-urban classification of wards for all other areas. Around 10% of awards

[1] CAS wards are Census Area Statistics wards. In Wales these correspond to unitary authority wards.

could not be assigned to a specific location on the basis of the information available in the database. This database also does not include awards made through the Heritage Lottery Fund, the Millennium Fund or SportsLot.

1.37 Data on the location of supermarkets, hospitals, police stations, FE colleges and secondary schools has been collated from information available on the websites of the supermarket companies, NHS Wales, the police authorities, HERA and the local authorities respectively. Again, the location of these facilities has been classified by area type (small town/ urban and fringe / rural) on the basis of information contained in the database, defining small towns as listed in appendix A and using the ONS rural-urban classification of wards for all other areas. In a few cases the redefined small town boundaries described in appendix B have been used to include facilities that would otherwise have been placed outside the towns concerned.

1.38 The part one research has also employed two sets of primary data collected in earlier research by the Wales Rural Observatory. First, data on migration has been used from a telephone survey of 4,023 households in rural Wales conducted by NOP on behalf of the Observatory between February and March 2004. Further methodological information on this survey can be found in WRO (2004). Second, data on local services provision has been used from a postal questionnaire survey of town and community council clerks undertaken in late 2004. The survey was sent to all 593 councils in rural areas of Wales with a 69% response rate. The responses included 37 from councils that are defined as small or market towns in this study. Further details of this survey can be found in WRO (2005).

CHAPTER 2: DEFINING SMALL AND MARKET TOWNS

Introduction

2.1 There is no standard definition of small and market towns current in use in Britain. Previous studies and public agencies have employed a variety of definitions combining population, land use and function indicators. Small and market towns need to be distinguished both from large villages and from larger urban areas, yet at either extreme they share many characteristics with these other categories. Smaller market towns may have a similar or lower population than many villages but are identifiable the presence of a distinct clustering of commercial services and an established civic infrastructure and tradition. Small and market towns are also morphologically distinctive as stand-alone settlements rather than as a part of a more extensive urban area, and in this way may be distinguished from suburban business districts.

2.2 The Dynamic Smaller Towns report defined ‘smaller towns’ as towns between 1,000 and 30,000 inhabitants that provided a service and employment function for a surrounding rural area (Brown et al., 2004). This population range is broadly consistent with other definitions, although some, such as that employed by the Countryside Agency in England, set a maximum population threshold of 20,000. Furthermore, the low population density of rural Wales means that a number of settlements that have historically performed the function of a market town have significantly lower populations than would normally be expected elsewhere in the country, including several with populations of fewer than 1,000 inhabitants.[2]

2.3 A further problem is encountered in defining the area of a small town for which the population is calculated. The built-up areas of many small towns transcend community council boundaries such that the recorded population for the community may understate the actual size of the town as an urban area. Additionally, many major employment sites, including factories, industrial estates, hospitals, schools and colleges are located on the edge of small towns and may technically lie outside their civic boundaries (see also paragraph 2.9).

Rural-Urban Classifications

2.4 In order to overcome some of these difficulties, we have based our definition of small and market towns in this report on the rural and urban area classifications produced by the Official of National Statistics (ONS), which can be employed at a variety of scales. The ONS classification involved a coding of census output areas (units of adjacent postcodes of approximately 125 households) through a three-stage process. Firstly, output areas were

[2] There is no standard definition of a ‘market town’ and precise population figures are difficult to establish for small built-up areas. However we would suggest that there are nine settlements in rural Wales with a population of less than 1000 that have performed the function of a market town: Tregaron (Ceredigion), Aberdaron, Abersoch (Gwynedd), Newport (Pembrokeshire), Llanfair Caereinion, Llanfyllin, Llanwyrtyd Wells, Montgomery (Powys), and Rhosneigr (Ynys Mon). As Appendix A indicates, most of these towns are located within wards covering a larger area with populations that exceed 1000.

classified as urban or rural according to whether or not the majority of households in the area formed part of a settlement of 10,000 or more inhabitants. Secondly, rural output areas were further categorized as 'town and fringe', 'village', or 'hamlet and isolated dwellings' on the basis of the density of households calculated for 100x100 metre grid squares (Bibby and Shepherd, 2004). Thirdly, the geographical context of an output area was categorized according to population density calculated at scales of 10km, 20km and 30km to produce a 'sparsity score'. An output area was classified as 'sparse' if it fell within the 5% of output areas with the greatest sparsity scores at all three scales. All other output areas were classified as less sparse. This process produces an eight-fold classification of output areas:

- Urban (Sparse)
- Town and Fringe (Sparse)
- Village (Sparse)
- Hamlet and Isolated Dwelling (Sparse)
- Urban (Less Sparse)
- Town and Fringe (Less Sparse)
- Village (Less Sparse)
- Hamlet and Isolated Dwelling (Less Sparse)

2.5 The ONS has also used aggregated output area data to produce equivalent classifications for super output areas, local authority wards and local authorities. This enables data available at a variety of scales to be analyzed according to the rural-urban classification.

Definition of Small and Market Towns in this Study

2.6 Small and market towns are defined for the purposes of this study as those settlements in the nine core rural counties of rural Wales that are made up of wards classified by the ONS as:

- Town and Fringe (both sparse and less sparse)
- Urban (sparse) (in effect Aberystwyth, Carmarthen, Holyhead and Newtown)
- Urban (less sparse) where the settlement is separated from other urban areas by a significant intervening rural area (in effect Abergavenny, Bangor, Caldicot, Chepstow, Haverfordwest and Milford Haven)

Excluding:

- Urban (less sparse) wards that are part of a continguous urban area including two or more distinctive towns (in effect excluding, within the nine core rural counties, the North Wales coastal strip from Llandudno to Prestatyn; Ystradgynlais; and Llanelli, Ammanford and area.)
- Wards classified as 'town and fringe' which are urban fringe areas adjacent to the contiguous urban areas of the North Wales coast, Llanelli/Ammanford, and Newport/Cwmbran.

2.7 Employing this definition at a ward level we have identified 81 small and market towns in rural Wales, which are listed in appendix A. Additionally, we have also included in this list nine settlements that have historically performed the function of market towns and which have 'town councils', but which are within wards classified as 'village' areas (Corwen, Llanfair Caereinion, Llanfyllin, Llanwyrtyd Wells, Montgomery, Newcastle Emlyn, St Clears, Tregaron and Whitland). These nine towns are not included as 'small towns' in the ward level analysis of population and economic statistics in chapters 3 and 4 (they are included in the 'rural' category), but are included as 'small towns' in the analysis of service location and investment in chapters 4 and 5.

Definition of Small Town Areas and Scales of Data

2.8 The data employed in this report have been obtained from databases constructed using a variety of spatial units. As such, the precise delimitation of small and market towns is not always consistent. Where possible we have used data available at the census output area level to permit the closest possible delimitation of small town areas, but data is not available at the scale for all variables.

2.8 The aggregate statistics on population, employment and VAT-registered businesses presented for an all-Wales level and for all rural Wales in chapters 3 and 4 are derived from data aggregated to a local authority level by the Office for National Statistics and reflect output level classifications. The aggregate statistics for population change in chapter 3 are based on community area and define small and market towns according to the wards listed in appendix A

2.9 Chapter four presents a more detailed analysis of 44 towns as listed in appendix B. For the purposes of this analysis, the areas of these towns have been more tightly defined using census output areas (see appendix B). In general the area of the town has been defined as all adjacent output areas that are classified as 'urban' or 'town and fringe'. However, for some towns adjacent output areas classified as 'village' or 'hamlet and isolated dwelling' have been included in order to ensure that all residential streets in the contiguous built-up area of the town are included and that major sites of employment on the edges of towns are included. For example, the defined area of Aberystwyth has been expanded to include the output area within Llanfarian ward that includes the Glanyrafon Industrial Estate, which is technically classified as 'hamlet and isolated dwellings'.

2.10 For 17 towns the town area is the same using output areas as using wards. For six towns, the output area definition is slightly larger than the ward-based definition. The northern part of Withybush, for example, has been included in the area of Haverfordwest, and Llanelwedd and the Royal Welsh Showground have been included in Builth Wells. The remaining 21 towns all have a smaller area and population on the output area definition as rural parts of wards have been excluded. This is particularly significant for a number of smaller towns that are in wards containing other settlements. Knighton ward, for example, includes the village of Norton which has been excluded from the output area definition. Newcastle Emlyn, which cannot be satisfactorily defined at a ward level, has been defined as comprising the ‘town’ output areas in Cenarth ward in Carmarthenshire and the ‘town’ output areas for the settlement of Adpar in Ceredigion. Similarly, the output areas for Tutshill and Sedbury on the English side of the River Wye have been included within the area of Chepstow.

2.11 Data on the presence of services within small towns presented in chapter 4 is taken from the WRO Services Survey, which collected data by means of a survey sent to community and town council clerks. As such the data relates to community areas, which are often more restricted than the town areas defined in appendix B. Similarly, data sourced from the WRO Household Survey uses a self-definition by respondents of whether they live in a town, a village, a hamlet or open countryside.

2.12 Finally, data obtained from other published sources, including the Dynamic Smaller Towns report, may also use different definitions both of small towns as a category and of the area of individual towns.

CHAPTER 3: SMALL TOWNS IN THE CONTEXT OF RURAL WALES

Introduction

3.1 Small and market towns occupy a distinctive social and economic position in Wales that is different to that both of larger urban areas and of villages and dispersed rural communities. At the same time, small and market towns are connected through population flows, employment relations and economic transactions both to their own rural hinterlands, and to larger urban centres. This chapter examines the social and economic context of small and market towns in rural Wales. The first part focuses on the population characteristics of small and market towns, including population size and change, migration and demography. The second part focuses on the economic characteristics of small and market towns, in particular the number, size and industry of VAT registered enterprises and local units.

Population

3.2 Across Wales as a whole, around half a million people live in town and fringe areas, or in the remoter urban areas of Aberystwyth, Carmarthen, Holyhead and Newtown, comprising just under a fifth of the national population and roughly equivalent to the residual ‘rural’ population (table 3.1). Most of these, however, are in the suburbs, urban fringe communities and former mining towns of South Wales and North East Wales. In the nine counties conventionally considered as the core of rural Wales[3], the population splits very roughly 45/25/30 between villages and open countryside, town and fringe areas, and urban areas on the Office of National Statistics classification (table 3.2). However, this classification in itself does not identify the small town population. A definition of small towns using this data, as outlined in chapter one, identifies 81 small and market towns in rural Wales, with a combined population of 377,833 or 39% of the population of the nine counties (table 3.3) (this excludes 9 small and market towns in wards classified as ‘village, hamlet and isolated dwellings by the ONS categorization (see paragraph 2.7)).

3.3 The eighty-one small and market towns themselves vary significantly in size. Three quarters have populations of between 1,000 and 5,000 inhabitants, although the range of population (calculated at ward level) extends from 901 (Rhosneigr) to 16,928 (Aberystwyth) (table 3.4). The five largest towns (Aberystwyth, Bangor, Carmarthen, Abergavenny and Milford Haven) account for a fifth of the small town population in rural Wales. Small towns also have a differing significance in terms of the population structure of the different rural local authorities, comprising over half the population in Gwynedd, Pembrokeshire and Monmouthshire, but less than a third of the population in Conwy, Denbighshire and Carmarthenshire (table 3.5). At a town level, Aberystwyth has the greatest population significance within its county, accounting for 23% of the population of Ceredigion, followed by

[3] Carmarthenshire, Ceredigion, Conwy, Denbighshire, Gwynedd, Monmouthshire, Pembrokeshire, Powys and Ynys Mon.

Holyhead (17% of the population in Ynys Mon), Abergavenny (16% of the population in Monmouthshire) and Bangor (14% of the population in Gwynedd).

	Population 2001	%
Urban –sparse	56,160	1.9%
Town and fringe – sparse	96,166	3.3%
Town and fringe – less sparse	371,674	12.8%
Total 'town & fringe' & 'urban-sparse'	**524,000**	**18.0%**
Village - sparse	150,950	5.2%
Village – less sparse	202,845	7.0%
Hamlet & isolated – sparse	122,062	4.2%
Hamlet & isolated – less sparse	93,399	3.2%
Total 'rural'	**569,256**	**19.6%**
Urban – less sparse	1,809,829	62.3%

Table 3.1: Population of Wales by Rural-Urban Area Classification

	Population 2001	%
Urban –sparse	56,160	5.9%
Town and fringe – sparse	96,166	10.0%
Town and fringe – less sparse	138,367	14.4%
Total 'town & fringe' & 'urban-sparse'	**290,693**	**30.3%**
Village - sparse	150,950	15.7%
Village – less sparse	94,551	9.9%
Hamlet & isolated – sparse	121,716	12.7%
Hamlet & isolated – less sparse	53,282	5.6%
Total 'rural'	**420,499**	**43.8%**
Urban – less sparse	248,294	25.9%

Table 3.2: Population of Rural Wales by Rural-Urban Area Classification
(9 core rural counties)

	Population 2001	%
Small Towns	377,833	39.3%
Other Town and Fringe Areas	34,891	3.6%
Other Urban Areas	175,396	18.3%
Villages, Hamlets and Isolated Dwellings	371,366	38.7%
Total population	959,486	100.0%

Table 3.3: Significance of Small Towns in the Population
of the Nine Core Counties of Rural Wales

Population band	Number of towns	Percentage
15,000+	4	4.9%
10,000 – 14,999	6	7.4%
7,500 – 9,999	6	7.4%
5,000 – 7,499	5	6.2%
2,500 – 4,999	30	37.0%
1,000 – 2,499	31	38.2%
Under 1,000	2	2.5%

Table 3.4: Population of Small and Market Towns in Rural Wales (2001 Census)

	Small Towns	Other Town & Fringe	Other Urban	Village & Open Countryside
Carmarthenshire	43,700 25%	7,937 4%	59,693 35%	61,512 36%
Ceredigion	28,181 38%	-	-	46,760 62%
Conwy	14,459 13%	17,195 16%	62,715 57%	15,227 14%
Denbighshire	28,523 31%	-	46,452 50%	18,090 19%
Gwynedd	65,853 55%	-	-	50,990 45%
Monmouthshire	50,773 60%	9,759 12%	-	24,353 28%
Pembrokeshire	63,698 56%	-	-	50,433 44%
Powys	50,745 40%	-	6,536 5%	69,073 55%
Ynys Mon	31,901 48%	-	-	34,928 52%

Table 3.5: Significance of Small Town Population by County in Rural Wales (2001 Census)

3.4 The population of rural Wales as a whole has increased significantly during the last two decades. In 1981 the territory now covered by the nine ‘core’ counties of rural Wales had a population of 886,200, by 2001 this had increased to 959,700 – a 8.2% increase. However, as earlier analysis by the Wales Rural Observatory has shown, this population growth has not occurred evenly across rural Wales. Thus, whilst small and market towns have in general increased their population with the regional trend, there is considerable variation in the rate and pattern of population change between towns. At one extreme, the populations of Aberystwyth, Lampeter and Presteigne increased by more than third between 1981 and 2001 (in the first two cases this is in part associated with increased enrolment at the universities); at the other extreme, the populations of Caldicot, Haverfordwest, Holyhead, Milford Haven and Pwllheli decreased over the same period.

3.5 Breaking the population change down into the two ten-year periods, six distinctive population trends can be identified for 35 of the sample small towns for which comparable data is available (table 3.6). Firstly, five of these towns have exhibited continuing significant growth over the two decades, with population increases of around 5% or more in both periods. Notably, all of these towns are located either in central Powys or close to the English border (see appendix C for the full data). Secondly, three towns, Aberystwyth, Chepstow and Llandeilo have shown accelerating growth, with relatively modest population increases during the 1980s followed by significantly more rapid increases in the 1990s. Thirdly, six towns have shown steady growth, with overall population increases of between 3% and 8% between 1981 and 2001. These towns are distributed across rural Wales and include both smaller towns such as Bala and Aberaeron and larger towns including Carmarthen and Pembroke Dock. Fourthly, three towns (Fishguard, Llangefni and Pembroke) have had stable populations, with small increases in both decades but less than a 3% total increase across the twenty year period. These have been grouped in table 3.6 with seven towns whose population has fluctuated since 1981. Three of these towns lost population in the 1980s, but increased population during the 1990s (including Llanidloes, whose population increased by 9.2% between 1991 and 2001). In the other four towns, population growth in the 1980s was followed in the 1990s by slight decreases in population. Finally, four towns have experienced sustained population decreases over this period. Three of these towns (Holyhead, Milford Haven and Pwllheli) have far west-coast locations, and three (Holyhead, Milford Haven and Caldicot) are associated with declining port or industrial employment.

	1981-91	1991-2001	1981-2001
Continuing Significant Growth			
Builth Wells	+12.0%	+16.6%	+30.6%
Monmouth	+10.7	+7.1	+18.5
Accelerating Growth			
Aberystwyth	+3.4%	+36.7%	+43.4%
Chepstow	+1.1%	+16.0%	+17.2%
Slowing Growth			
Bangor	+13.0%	+3.0%	+16.3%
Llandrindod Wells	+13.1%	+2.6%	+16.0%
Steady Growth			
Denbigh	+4.2%	+1.4%	+5.7%
Carmarthen	+0.6%	+3.5%	+4.1%
Fluctuating or Stable Population			
Caernarfon	-0.3%	+1.9%	+1.6%
Cardigan	+2.8%	-1.8%	+0.9%
Falling Population			
Holyhead	-7.1%	-2.7%	-9.6%
Pwllheli	-3.3%	-0.5%	-3.8%

Table 3.6: Examples of Patterns of Population Change for Small and Market Towns in Rural Wales

3.6 The variation between towns to some extent reflects sub-regional differences in population trends. The area of central Wales and northern Ceredigion that includes towns with high rates of growth such as Aberystwyth, Builth Wells, Hay on Wye, Presteigne and Welshpool has an overall trend of significant population growth, whilst the population decreases in Haverfordwest, Holyhead, Milford Haven and Pwllheli reflects more general patterns of decreasing population in large parts of Pembrokeshire and North West Wales (see figure 3.1).

3.7 However, many small towns do exhibit a distinctive pattern of population change relative to neighbouring rural areas. As table 3.7 shows, thirteen of the towns in the sample had greater rates of population growth between 1991 and 2001 than the average for the county in which they are located. Notably, nine of these towns are located in three of the fastest growing counties in Wales - Ceredigion (14.4% population increase between 1991 and 2001), Monmouthshire (6.0%) and Powys (5.6%) - and as such may be identified as towns that are helping to drive population growth in these areas. However, the majority of towns in the sample had slower rates of population growth than the local authority mean, suggesting that in areas such as Carmarthenshire and Pembrokeshire population growth is driven by increases in rural communities. Yet, it should also be noted that several of these towns are still growing in population at a faster rate than their immediately surrounding rural communities or stand out as pockets of modest population increase in areas of overall population decline, for example Bala, Fishguard and Llangefni (see figure 3.1)

Rate of growth above local authority mean	Llangefni, Bangor, Ruthin, Builth Wells, Llandrindod Wells, Newtown, Presteigne, Welshpool, Aberystwyth, Lampeter, Llandeilo, Chepstow, Monmouth
Rate of growth in line with local authority mean	Hay-on-Wye, Carmarthen
Rate of growth below local authority mean	Holyhead, Bala, Caernarfon, Pwllheli, Llanrwst, Denbigh, St Asaph, Brecon, Llanidloes, Machynlleth, Rhayader, Aberaeron, Cardigan, Fishguard, Haverfordwest, Milford Haven, Pembroke, Pembroke Dock, Tenby, Caldicot

Table 3.7: Rates of Growth in Small and Market Towns Compared with Local Authority Average, 1991-2001.

3.8 Population growth is linked to housing growth, which was one of the indicators analysed in the Dynamic Smaller Towns report. As the data presented in that report for ten small towns in Wales shows, relative housing growth reflects relative population growth, with Aberystwyth and Presteigne recording the largest number of new housing units (table 3.8). Furthermore, the Dynamic Smaller Towns report also notes that for eight of these towns, housing growth in the town was greater than housing growth in the residual rural area, in some cases significantly so. The exceptions, Bangor and Llanidloes, showed housing growth broadly in line with that in the residual rural area.

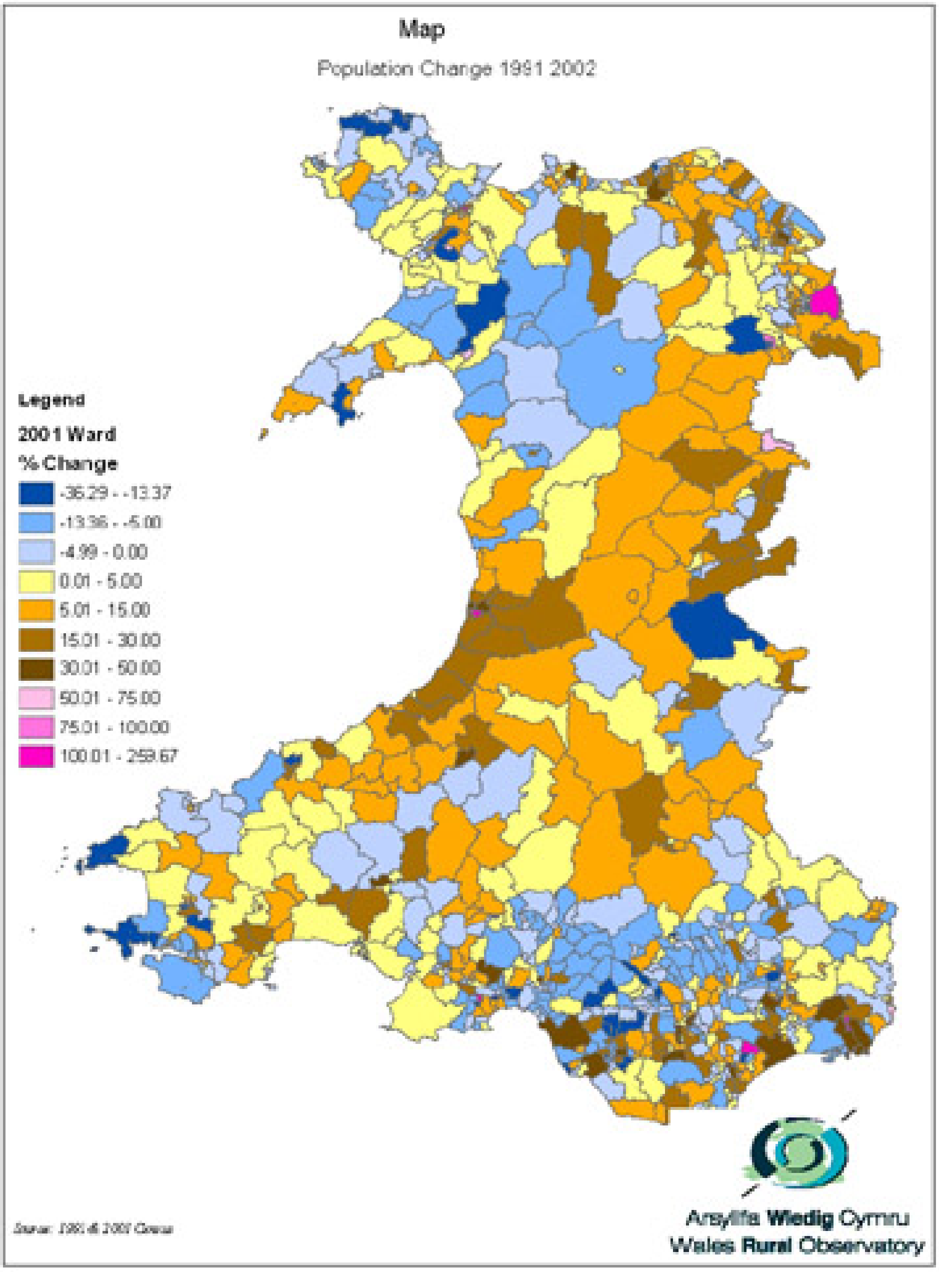

Figure 3.1: Population change in Wales by ward, 1991-2001.

	Increase in dwellings (actual) in town	Increase in dwellings (%) in town	Increase in dwellings (%) in surrounding rural area
Aberystwyth	1400	28.3%	8.3%
Presteigne	200	20.7%	8.8%
Newcastle Emlyn	200	14.2%	8.8%
Machynlleth	100	9.7%	8.8%
Brecon	300	9.6%	8.8%
Fishguard	150	9.3%	8.7%
Bala	100	8.8%	5.7%
Llanidloes	100	8.7%	8.8%
Abergavenny	400	6.5%	4.3%
Bangor	300	5.6%	5.7%

Table 3.8: Housing Growth in Selected Small Towns and Surrounding Rural Areas, 1991-2000.

Source: Dynamic Smaller Towns report (Brown et al., 2004).

3.9 Small and market towns are therefore part of complex webs of migration and population change that operate at regional and sub-regional scales embracing both small towns and rural communities. The telephone survey of 4,023 households in rural Wales conducted for the Wales Rural Observatory in spring 2004 showed that degrees of mobility and stability of households were broadly similar across different types of settlement, although respondents who described themselves as living in a town were slightly more likely to have moved recently than those living in villages, hamlets or open countryside, and slightly less likely to have lived at the same address for more than twenty years (table 3.9).

3.10 The results from the household survey also indicate complex patterns of population flows within and beyond rural Wales. The majority of respondents living in towns had lived in a town or city prior to moving to their current address (which may be a property in the same town, or may be a different town or city), but there is also a significant minority group that has moved into small towns from more rural communities (table 3.10). Moreover, whilst just over half of town respondents stated that they had lived in a small town for ‘most of their life’, around a quarter of current town residents reported that they had spent most of their life in a major town or city, and almost a fifth reported that they had spent most of their life in a rural community (table 3.11). As such, small towns are arguably the beneficiaries of processes of both urbanisation and counterurbanisation depending on the scale at which population trends are measured.

3.11 Furthermore, table 3.11 suggests that some of the population growth of small towns in rural Wales is the product of long-distance migration, with around a quarter of town residents having spent most of the life outside Wales. At the same time, small towns appear to be a comparatively less favoured destination for migrants from outside Wales than rural communities.

	Town	Village	Hamlet or Open Countryside
Less than 1 year	10%	8%	7%
1-2 years	9%	8%	6%
2-5 years	21%	19%	16%
5-10 years	17%	18%	18%
10-20 years	19%	22%	23%
More than 20 years	24%	25%	29%
Total responses	1349	1935	733

Table 3.9: Length of residence in current home, by self-definition of home area
Source: WRO Household Survey 2004

	Self-description of current home		
	Town	Village	Hamlet or Open Countryside
Town or city	58%	41%	41%
Large village	7%	13%	8%
Small village	16%	27%	18%
Hamlet	1%	2%	6%
Open Countryside	6%	7%	20%
Always lived in current home	10%	8%	6%
Total responses	1349	1935	733

Table 3.10: Description in place lived in before moving to current home.
Source: WRO Household Survey 2004

	Self-description of current home		
	Town	Village	Hamlet or Open Countryside
Major town or city	26%	22%	22%
Smaller town	57%	17%	17%
Large village	5%	21%	6%
Small village	7%	34%	13%
Hamlet	3%	5%	32%
Open Countryside	3%	5%	32%
In Wales	74%	71%	63%
Outside Wales	26%	29%	37%
Total responses	1349	1935	733

Table 3.11: Area in which respondent has spent most of their life.
Source: WRO Household Survey 2004

3.12 Analysis of the household survey also shows that property-related factors are most significant as reasons for residents in towns moving to their current home, but also indicates that employment-related factors were more significant for town residents than for respondents living in hamlets or open countryside. Eighteen percent of respondents in towns reported that they moved to their current home in order for either themselves or their partner to get employment.

3.13 These findings, along with other analysis of local level migration trends in Mid Wales undertaken elsewhere (Walford, 2005), suggest that migration into small towns may be associated with particular points in the life cycle. Younger people move from rural communities into local small towns in order to access employment and training opportunities and because of the greater availability of affordable housing, including rented properties. At the same time, there is some evidence of a trend of elderly people moving into small towns from rural communities in order to access better care, including sheltered accommodation (Newidiem, 2003).

3.14 As such the small towns with the greatest rates of population turnover are also those which have a high turnover of residents aged between 15 and 24. Not surprisingly, as table 3.12 shows, nine out of the ten small town wards with the highest population turnovers are located in the university towns of Aberystwyth and Bangor and are associated with short-term student accommodation. However, even when the university towns are excluded (also including Lampeter and Carmarthen), high rates of population turnover continue to be linked to significant in-migration by young people, particularly in sub-regional centres such as Haverfordwest, Newtown and Llandrindod Wells (table 3.13).

	Population inflow rate, 2000-1	Population outflow rate, 2000-1	Inflow of persons aged 15-24
	Per 1,000 residents		
Llanbadarn Sulien (Aberystwyth)	417	369	559
Garth (Bangor)	387	349	740
Bronglais (Aberystwyth)	347	324	542
Menai (Bangor)	282	309	365
Central (Aberystwyth)	277	289	377
North (Aberystwyth)	228	220	348
Deinol (Bangor)	227	257	322
Faenor (Aberystwyth)	212	221	457
Llandrindod East/West	194	158	386
Rheidol (Aberystwyth)	191	195	337

Table 3.12: Highest Population Turnover Rates for Small Town Wards, 2000-1

	Population inflow rate, 2000-1	Population outflow rate, 2000-1	Inflow of persons aged 15-24
	Per 1,000 residents		
Llandrindod East/West	194	158	386
Drybridge (Monmouth)	178	99	212
Priory (Haverfordwest)	173	114	295
Newtown East	144	115	174
Cardigan Teifi	140	148	256
Castle (Haverfordwest)	138	145	255
Pembroke Dock Market	138	95	276
Holyhead Town	79	144	135
Denbigh Central	100	136	231
Garth (Haverfordwest)	110	161	132

Table 3.13: Highest Population Turnover Rates for Small Town Wards, excluding University Towns

3.15 Only a limited number of towns, however, have the appropriate structural characteristics to sustain significant in-migration by younger people. In particular this type of migration is associated with towns that have significant employment opportunities, particularly in administrative and clerical positions, are centres for education at HE and FE level, and have a relatively large rental property sector or lower property prices than neighbouring communities. In contrast, small towns that do not have these characteristics are liable to have an outflow of young people, contributing a relative aging of the population profile. Moreover, this trend is compounded in some towns such as Aberaeron that are seen as attractive retirement locations.

3.16 Consequently, there is a polarisation in the age profiles of small and market towns in rural Wales. A number of towns including the university locations of Aberystwyth, Bangor and Lampeter, but also Brecon, Caernarfon, Caldicot, Chepstow, Denbigh, Holyhead, Milford Haven, Newtown, Pembroke and Pembroke Dock have populations with a mean age of under 40 (see appendix C for the full data). In several of these towns more than a third of residents are aged under 25 (table 3.14). In contrast, the mean age of the population in Aberaeron, Presteigne and Rhayader is over 45, and more than a quarter of residents in each of these towns are aged over 60 (table 3.14). Again, these differences in age structure to some extent reflect regional differences within rural Wales, but it is notable that the towns with the youngest and most elderly populations also stand out in comparison with the overall average for their local authority area (table 3.15).

	Mean Age of Residents	Population aged under 25	Population aged over 65
Highest mean age			
Aberaeron	46.9	23.7%	29.3%
Rhayader	45.1	24.6%	26.2%
Presteigne	44.8	25.6%	26.2%
Dolgellau	44.1	28.3%	21.8%
Llangollen	43.9	24.9%	21.7%
Lowest mean age			
Haverfordwest	37.7	34.3%	16.4%
Pembroke Dock	37.5	33.8%	15.1%
Newtown	37.3	33.9%	15.0%
Bangor	35.1	44.0%	13.8%
Aberystwyth	34.9	49.2%	14.2%

Table 3.14: Towns with highest and lowest mean ages

Mean age of residents five or more years higher than mean for county	Aberaeron
Mean age of residents between two and five years higher than mean for county	Dolgellau, Porthmadog, Llangollen, Llanidloes, Presteigne, Rhayader, Fishguard, Llandeilo,
Mean age of residents within two years either way of mean for county	Llangefni, Bala, Blaenau Ffestiniog, Caernarfon, Pwllheli, Llanrwst, Ruthin, St Asaph, Builth Wells, Crickhowell, Hay on Wye, Knighton, Llandrindod Wells, Machynlleth, Welshpool, Cardigan, Milford Haven, Pembroke, Tenby, Carmarthen, Llandovery, Abergavenny, Caldicot, Monmouth.
Mean age of residents between two and five years lower than mean for county	Holyhead, Denbigh, Brecon, Newtown, Lampeter, Haverfordwest, Pembroke Dock, Chepstow,
Mean age of residents five or more years lower than mean for county	Bangor, Aberystwyth.

Table 3.15: Mean Age of Small Town Residents Compared With Mean of Age of Population in the County

3.18 Analysis of population statistics therefore demonstrates that the small and market towns of rural Wales do not form a homogenous category with consistent trends, but that there is marked difference between towns that have experienced significant population growth helped by in-migration by younger residents from rural communities; towns that have experienced population growth despite youth out-migration, assisted by longer-distance and retirement migration; towns with fairly stable populations; and towns whose population is decreasing. There is a broad relationship between these trends in individual towns and the wider trends in the sub-regional context in which they are located, but most small towns also exhibit distinctive patterns of population structure and population change to their neighbouring rural areas.

3.19 A similarly variegated pattern emerges when other socio-economic characteristics are considered. Data from the Index of Multiple Deprivation (2000), for example, shows that taken as a category, small and market towns in rural Wales generally have a higher level of deprivation than rural communities but a lower level than the larger urban units within the nine counties (table 3.16). Indeed, it is notable that on most measures, the mean deprivation score for small towns is remarkable close to the mean for Wales as a whole – the exceptions being health deprivation and access deprivation, on which small towns are significantly less deprived than the Wales average.

3.20 Yet, this average position masks considerable differences in the level of deprivation between individual towns. There were only 12 small town wards from the nine rural counties among the 100 most deprived wards in Wales in the 2000 Index of Multiple Deprivation, but these included the sixth most deprived ward, Peblig in Caernarfon, the fourteenth, Monkton in Pembroke, and the eighteenth, Marchog in Bangor (see table 3.17). At the other end of the scale, 21 of the 100 least deprived wards in Wales were small town wards in rural Wales, including the fourth least deprived ward, Usk, and the seventh least deprived ward, St Kingsmark in Chepstow (see table 3.18). Similarly, in the access domain, only five small town wards were included in the 100 most deprived, but these included the fourth most deprived ward, Aberdaron; whilst 19 small town wards were among the 100 least deprived wards, including the three least deprived wards – Hirael and Menai wards in Bangor (ranked 863 and 865 out of 865 respectively) and Pembroke Dock Central (ranked 864). As table 3.19 shows, the indices also the reveal a greater prevalence for some forms of deprivation over others in small towns. Thus, whilst no small town wards were in the 100 most deprived wards in the health domain, small town wards comprised 30 of the 100 most deprived wards in the housing domain, including the first and third most deprived (Aberdaron and Pwllheli North respectively).

Domain	**Small Towns (n=164)**	**Rural (219)**	**Urban & Fringe (63)**	**All Wales mean (865)**
Index of Multiple Deprivation	19.86	16.84	25.00	21.75
Income	26.98	19.78	28.70	25.58
Employment	15.30	12.48	18.66	15.92
Health	-0.36	-0.60	0.48	0.00
Education	0.05	-0.58	0.13	0.00
Housing	0.13	0.16	0.10	0.11
Access	-0.23	1.14	-0.42	0.00

Table 3.16: Mean score of wards in Rural Wales in Index of Multiple Deprivation 2000, by category.

NB: Higher score equals greater deprivation. Figures for 1991 wards, wards in 9 'core' counties of Rural Wales only. Source: NAfW (2000).

Ward	Town	IMD Score	IMD Rank
Peblig	Caernarfon	67.93	6
Monkton	Pembroke	64.14	14
Marchog	Bangor	62.35	18
Morawelon	Holyhead	52.08	40
Tudur	Llangefni	45.25	73
Bowydd and Rhiw	Blaenau Ffestiniog	44.92	74
Llanion	Pembroke Dock	43.20	76
Barmouth	Barmouth	42.71	79
Maeshyfryd	Holyhead	42.01	83
Amlwch Port	Amlwch	40.46	90

Table 3.17: The ten most deprived wards in small towns in rural Wales, measured in the Index of Multiple Deprivation, 2000.
NB: Figures for 1991 wards, wards in 9 'core' counties of Rural Wales only.
Source: NAfW (2000).

Ward	Town	IMD Score	IMD Rank (/865)
Usk	Usk	1.79	861
St Kingsmark	Chepstow	2.09	859
Larkfield	Chepstow	3.90	841
Caldicot Castle	Caldicot	3.90	840
Denbigh Lower	Denbigh	4.48	833
Aberystwyth East	Aberystwyth	4.67	828
Raglan	Raglan	5.22	818
Llanllwchaiarn North	Newtown	5.37	813
Vauxhall	Monmouth	5.60	809
Gwyngyll	Llanfair PG	5.74	805

Table 3.18: The ten least deprived wards in small towns in rural Wales, measured in the Index of Multiple Deprivation, 2000.
NB: Figures for 1991 wards, wards in 9 'core' counties of Rural Wales only.
Source: NAfW (2000).

Rank	IMD	Health	Education	Housing	Access	Income
1-100	12	0	8	30	5	19
101-200	18	9	8	22	11	23
201-300	23	15	26	26	23	23
301-400	18	31	33	20	25	18
401-500	19	26	22	16	32	20
501-600	22	22	26	17	20	20
601-700	20	33	22	11	18	20
701-800	21	16	9	17	14	16
801-865	11	11	9	5	15	5

Table 3.19: Distribution of small town wards in rural Wales in the Index of Multiple Deprivation by rank band by domain. (n=164).
Source: NAfW (2000)

3.21 The distribution of small town wards in the Index of Multiple Deprivation largely reflects predictable regional differences, with towns in the peripheral north and west generally positioned higher in the Index and towns in south-east Wales, especially Monmouthshire, generally positioned in the lower ranks. More significant, therefore, might be the relative deprivation score for small town wards compared with neighbouring rural wards. As analysis for a sample of 36 towns shows, there is again no consistent pattern of performance, but four categories can be identified (table 3.20; see appendix D for the full figures).

3.22 Firstly, a number of towns have significantly higher level of deprivation than their adjacent rural wards, notably ex-industrial or port towns such as Blaenau Ffestiniog, Holyhead and Fishguard and coastal resorts including Pwllheli and Tenby. Secondly, in contrast, several towns have a lower multiple deprivation score than their rural neighbours. These tend to be towns in more remote locations and/or centres of public sector employment. A third set of towns have very similar levels of deprivation to neighbouring rural areas, including both a number of smaller towns whose socio-economic character is more similar to rural communities (Bala, Machynlleth), and towns in more affluent regions such as Monmouthshire and central Carmarthenshire. Finally, in several towns there is a significant variation in the Index of Multiple Deprivation score between different constituent wards. These, unsurprisingly include some of the larger small towns, but also include some medium-sized towns such as Denbigh, Llangefni and Pembroke. Bangor, for example, includes both the eighteenth most deprived ward in Wales (Marchog) and the 791st (Garth), whilst Pembroke includes both the fourteenth most deprived (Monkton) and the 632nd (St Michael).

Higher mean IMD score than mean IMD score for adjacent rural wards	Blaenau Ffestiniog, Cardigan, Fishguard, Holyhead, Llandrindod Wells, Milford Haven, Pwllheli, Tenby, Welshpool.
Lower mean IMD score than mean IMD score for adjacent rural wards	Aberaeron, Builth Wells, Lampeter, Llanidloes, Porthmadog, Ruthin, St Asaph.
Mean IMD score similar to mean IMD score for adjacent rural wards	Bala, Brecon, Caldicot, Carmarthen, Chepstow, Llandeilo, Llangollen, Llanrwst, Machynlleth, Monmouth.
Significant variation in IMD score between wards in town	Abergavenny, Aberystwyth, Bangor, Caernarfon, Denbigh, Haverfordwest, Llangefni, Newtown, Pembroke, Pembroke Dock.

Table 3.20: Mean Index of Deprivation Score for Small Towns in Rural Wales compared with Mean Score for Adjacent Rural Wards

Source: NAfW 2000

Local Economy

3.23 If small and market towns perform a role in servicing rural Wales, then it might be anticipated that they will have a more significant presence in the economy of rural Wales than their share of population would otherwise suggest. Yet the evidence for this appears initially lacking. A simple count of VAT registered enterprises across Wales according to the ONS rural-urban classification shows that just under 17% of businesses were located in 'town and fringe' and 'urban-sparse' areas compared with 18% of the population (table 3.21). Similarly, only 31% of VAT registered enterprises in the 9 core counties of rural Wales are located in small towns (as defined in appendix A), compared with 39% of the population (table 3.22). However, these simple figures require further dismantling.

3.24 Firstly, as a record of VAT registrations they do not count workplaces that due to their nature or size are not registered for VAT, nor do they reflect activity in the informal economy. Secondly, there is a notable difference in the figures for enterprises and for local units, the former corresponding to a 'firm' or 'business' and the latter including branches and offices of larger organizations. As there are approximately 4,000 more local units than enterprises in small towns in rural Wales, this points towards the branch-plant-type economy of small towns, with branches constituting around a quarter of local units (compare table 3.22 and table 3.23). Thirdly, these figures are heavily skewed by the inclusion of farms as VAT units. When agricultural units are excluded, the significance of small towns increases, with half of non-agricultural VAT-registered units in rural Wales located in small towns (tables 3.22 and 3.23).

	Enterprises (Businesses)	%	Local Units (includes branch offices & factories)	%
Urban –sparse	1,320	1.8%	2,070	2.2%
Town and fringe – sparse	3,780	5.1%	5,155	5.5%
Town and fringe – less sparse	7,135	9.7%	9,290	9.9%
Total 'town and fringe' and urban - sparse	**12,235**	**16.6%**	**16,515**	**17.5%**
Village - sparse	6,345	8.6%	6,975	7.4%
Village – less sparse	6,645	9.0%	7,420	7.9%
Hamlet & isolated – sparse	10,980	14.9%	11,400	12.1%
Hamlet & isolated – less sparse	6,010	8.2%	6,656	7.1%
Total 'rural'	**29,980**	**40.8%**	**32,451**	**34.5%**
Urban – less sparse	31,295	42.6%	45,275	48.1%

Table 3.21: VAT registered enterprises and local units in Wales by Rural-Urban Classification 2005

Source: Data from the Inter-Departmental Business Register, published on the Office of National Statistics website.

	All enterprises		Excluding agricultural enterprises	
Small Towns	11550	31%	9955	42%
Villages and open countryside	21690	58%	9940	42%
Urban fringe areas	685	2%	585	3%
Urban	3195	9%	3050	13%
Total	37120	100%	23530	100%

Table 3.22: VAT-registered enterprises in nine core counties of rural Wales by area type, 2004
NB: Small towns as defined in appendix A. Areas classified at ward level. Enterprise numbers cumulative rounded to nearest 5.

	All local units		Excluding agricultural units	
Small Towns	15680	36%	14015	50%
Villages and open countryside	22285	51%	10645	38%
Urban fringe areas	770	2%	285	1%
Urban	4620	11%	2855	10%
Total				

Table 3.23: VAT-registered Local units in nine core counties of rural Wales by area type, 2004
NB: Small towns as defined in appendix A. Areas classified at ward level. Local unit numbers cumulative rounded to nearest 5.

3.25 Furthermore, the significance of small towns as the location for businesses in rural Wales varies geographically between counties. To a large extent, the degree of concentration of businesses reflects the degree of concentration of population. There is a particularly strong correlation in the distribution of VAT-registered enterprises (table 3.24 and compare with table 3.5), though when local units are counted the concentration in small towns is generally stronger than the population distribution would suggest (table 3.25). However, two slightly anomalous patterns stand out. Firstly, in Gwynedd and Ceredigion the concentration of businesses in small towns is significantly greater than the concentration of population, indicating the importance of towns in these counties as sub-regional centres of commerce and employment. Secondly, in Carmarthenshire and Denbighshire, which have significant urban populations in the Llanelli and Rhyl/Prestatyn areas respectively, the proportion of businesses located in these urban areas is notably lower than their share of the county's population, whilst the concentration of businesses in small towns is greater than their share of population. This suggests that small towns in these counties are able to compete economically with larger urban neighbours.

	Small Towns		Rural		Other Fringe		Other Urban	
Gwynedd	1810	61%	1180	39%				
Monmouthshire	1375	57%	835	35%	185	8%		
Pembrokeshire	1535	53%	1360	47%				
Ynys Mon	620	47%	700	53%				
Powys	1700	43%	2160	55%			100	2%
Ceredigion	815	43%	1100	57%				
Denbighshire	745	38%	505	25%			735	37%
Carmarthenshire	1035	28%	1675	46%	105	3%	850	23%
Conwy	320	13%	425	18%	295	12%	1365	57%
Total Rural Wales	**9955**	**42%**	**9940**	**42%**	**585**	**3%**	**3050**	**13%**

Table 3.24: VAT-registered enterprises in rural Wales by area, excluding agricultural units, 2004.

NB: Small towns as defined in appendix A. Areas classified at ward level. Source: Data from the Inter-Departmental Business Register, published on the Office of National Statistics website.

	Small Towns		Rural		Other Fringe		Other Urban	
Gwynedd	2570	65%	1400	35%				
Monmouthshire	1885	65%	795	28%	205	7%		
Pembrokeshire	2120	58%	1525	42%				
Ynys Mon	915	54%	790	46%				
Powys	2465	49%	2435	48%			155	3%
Ceredigion	1110	47%	1270	53%				
Denbighshire	1055	39%	615	22%			1065	39%
Carmarthenshire	1475	32%	1815	39%	110	2%	1230	27%
Conwy	420	10%	730	21%	355	10%	1975	57%
Total Rural Wales	**14015**	**50%**	**10645**	**38%**	**585**	**1%**	**3050**	**10%**

Table 3.25: VAT-registered local units in rural Wales by area, excluding agricultural units, 2004.

NB: Small towns as defined in appendix A. Areas classified at ward level. Source: Data from the Inter-Departmental Business Register, published on the Office of National Statistics website.

3.26 The data on VAT-registered enterprises and local units also provide an insight into the nature of the small town economy in rural Wales. In particular, they reveal an economy that is dominated by the service sector. One in five local units in small towns in rural Wales are retail businesses, whilst a further 15% are property and business services and almost 11% are in the hotel and catering industry (table 3.26). Moreover, businesses in these sectors are more likely to be located in small towns than in any other part of rural Wales. Over half of all retail units in rural Wales are located in small towns, as are nearly half of local units in the property and business services and hotel and catering industries (table 3.27). Similarly, half of VAT-registered public administration units are located in small towns. Additionally, small towns are the location of most higher-order service functions in the finance, health and post and telecommunications industries.

Retail	3055	19.5%
Property & Business Services	2410	15.4%
Hotels & Catering	1685	10.7%
Agriculture	1665	10.6%
Public Admin	1380	8.8%
Construction	1265	8.1%
Production	960	6.1%
Motor Trades	620	4.0%
Wholesale	645	4.1%
Transport	495	3.2%
Health	370	2.4%
Education	320	2.0%
Finance	275	1.8%
Post & Telecom	75	0.5%
Total	15680	100.0%

Table 3.26: VAT- registered local units in small towns in rural Wales by industry, 2004. (Small towns as defined in appendix A.)

Source: Data from the Inter-Departmental Business Register, published on the Office of National Statistics website.

	Small Towns		Rural		Other Fringe		Other Urban	
Finance	275	76%	10	3%	0	0%	75	21%
Health	370	62%	55	9%	5	1%	165	28%
Post & Telecom	75	58%	15	12%	10	8%	30	23%
Retail	3055	57%	1085	20%	85	2%	1090	21%
Public Admin	1380	49%	955	34%	55	2%	440	16%
Property & Business Services	2410	46%	1965	38%	140	3%	690	13%
Hotels & Catering	1685	46%	1325	37%	65	2%	555	15%
Education	320	40%	385	48%	5	1%	95	12%
Production	960	42%	960	42%	55	2%	285	13%
Wholesale	645	39%	740	45%	50	3%	220	13%
Motor Trades	620	38%	740	46%	40	3%	215	13%
Transport	495	38%	640	49%	40	3%	125	10%
Construction	1265	35%	1855	51%	105	3%	420	12%
Agriculture	1665	12%	11640	86%	100	1%	195	1%
Total Rural Wales	**15680**	**36%**	**22785**	**52%**	**770**	**2%**	**4620**	**10%**

Table 3.27: Geographical distribution of VAT-registered local units in rural Wales by industry, 2004. (Small towns as defined in appendix A. Areas classified at ward level.)

Source: Data from the Inter-Departmental Business Register, published on the Office of National Statistics website.

3.27 In contrast, there appears to be no particular trend of concentration in small towns for a number of other sectors, including production, wholesaling, motor trades, transport and construction. Indeed, more local units in these industries in rural Wales are located in villages and the open countryside than in small towns (table 3.27). As such, the significance of small and market towns as the centres of concentration for the rural economy in Wales is strongly dependent on the importance of the service sector in the region. Outside of the service sector, small and market towns are not dominant over their rural hinterlands in terms of business location to the same extent.

3.28 However, the economic significance of small towns in rural Wales is a function not only of the presence of economic units, but also of their size, and consequently of the employment opportunities in the towns. Two-thirds of local units in small and market towns in rural Wales employ four or fewer workers (table 3.28). Only around 8% have more than twenty employees, but this is four times the proportion for local units in the residual rural areas. More than half of all local units in rural Wales with five or more employees are located in small towns, and the degree of concentration increases with the size of the unit (table 3.29). It should be noted, however, that these figures are aggregated from ward-level data that is rounded to the nearest five units and therefore should be read with caution.

Number of employees	Approximate number of local units	%
0-4	10450	65%
5-9	2855	18%
10-19	1430	9%
20+	1270	8%
Total	16010	100%

Table 3.28: Breakdown of VAT-registered local units in small towns by employment size band, 2004. (NB: This table is based on rounded data at the ward level)

Source: Data from the Inter-Departmental Business Register, published on the Office of National Statistics website.

	Number of employees in local unit			
	0-4	5-9	10-19	20+
Small Town	31%	52%	57%	59%
Rural	58%	29%	25%	18%
Urban & Fringe	11%	19%	18%	23%
Total	100%	100%	100%	100%

Table 3.29: Distribution of VAT-registered local units within employment size bands in rural Wales, 2004. (NB: This table is based on rounded data at the ward level.)

Source: Data from the Inter-Departmental Business Register, published on the Office of National Statistics website.

3.29 The concentration of larger employers in rural Wales in the small and market towns is paralleled in the location of the largest companies by turnover in the region. Only 43 of the 300 top companies by turnover in Wales are based in rural Wales, and of these 34 are located in small towns, five in the immediate hinterlands of small towns, and just four in more rural locations (Western Mail, 2005). Moreover, as appendix E details, the towns hosting these companies are not necessarily the largest towns in rural Wales. Four of the companies are based in Llangefni, three in Newtown and three in Abergavenny and its hinterland. Holyhead, Chepstow, St Asaph, Newcastle Emlyn, Menai Bridge and Pwllheli all have two of the companies based in the town or the immediate hinterland. In contrast, among the towns with populations over 5,000 in the region, Caernarfon, Denbigh, Welshpool, Fishguard, Milford Haven, Pembroke, Pembroke Dock, Pembrey and Burry Port and Monmouth do not host any of the 300 largest companies in Wales, and Aberystwyth has one only in its hinterland not in the town itself.

3.30 The top companies in the small towns of rural Wales include some enterprises involved in 'newer' industries including technology and investment, but overall these companies display a very traditional profile revealing strong links to the rural hinterland. Eight of the 38 companies in towns and their immediate hinterlands are in the food processing industry, and quarrying and agricultural services are also represented (table 3.30). Furthermore, four of the six retail companies in the list are car retailers, reflecting the status of motor vehicles as one of the few high-value goods sold in small towns to a sub-regional market.

Industry	**Number**	**Percent**
Food processing	8	21%
Retail	6	16%
Manufacturing	5	13%
Engineering	3	8%
Construction	3	8%
Automotive	2	5%
Finance	2	5%
Technology	2	5%
Other	7	18%
Total	*38*	*100%*

Table 3.30: Companies in the top 300 in Wales by turnover located in small towns and their immediate hinterlands, by industry.

Source: Western Mail (2005)

3.31 Small and market towns in rural Wales therefore exhibit a distinctive economic profile that reflects their function as the centres of service provision and employment in the region. The dynamics of these roles are discussed further in the next chapter.

CHAPTER 4: SMALL TOWNS AS SERVICE AND EMPLOYMENT CENTRES IN RURAL WALES

Introduction

4.1 The concept of the 'market town' records the historic role played by such settlements as the social and economic centres for dispersed rural populations. The market town was the place that rural residents would come to in order to engage in commercial transactions – to sell their produce and wares, to buy goods and to find employment. Market towns also served as the communications nodes of the countryside, and it was the combination of all these factors that made the favoured locations for new factories as industrialization took root. Equally, over time market towns became the places where rural people would go to for secondary education and healthcare and for other services that could not be found in their own communities. The particular position of market towns, however, depended on the need to balance mass and distance – the need for there to be a sufficient mass of people in a place to support a market or a school or a hospital, against the need for such facilities to be within easy travelling distance of peoples' homes. The advent of motorized transport in the early twentieth century at first reinforced the service function of market towns, with the number of shops and other services in market towns increasing as the number in villages decreased. More recently, however, the increased and increasing ease of mobility of people in the countryside means that market towns themselves have lost out to larger regional centres.

4.2 This chapter examines the extent to which the small and market towns of rural Wales continue to play their historic role as social and economic centres for the region. In particular it focuses on two dimensions of this role. Firstly, the role of small and market towns as the centres for employment in rural Wales; and secondly, the role of small and market towns in providing public and commercial services to their rural hinterlands.

Employment

4.3 Just over half of all people working in the nine counties of rural Wales work in small and market towns (table 4.1), a significantly higher proportion than the share of the population that lives in them. This simple observation suggests that small and market towns are continuing to act as the employment centres of the region, drawing in workers from the rural hinterlands. Yet, the detailed picture is more complicated. There is an uneven distribution of jobs between small and market towns in rural Wales, such that whilst in some towns there are more than twice as many jobs as working age residents, in other towns there are fewer jobs than working age residents (table 4.2; see also appendix F for the full data).

4.4 The positioning of individual towns along this continuum tends to reflect not the size of the town, but its location and function (table 4.3). The towns with the highest ratios of jobs to working residents are significant administrative centres (Carmarthen, Haverfordwest, Llandrindod Wells, Llangefni and Aberaeron – all locations of county council headquarters), or medium-sized market towns in more remote locations (Cardigan, Welshpool), or both. The towns with lowest ratios of jobs to working residents, in contrast, tend to be relatively close to larger towns (or least towns with a more significant administrative function), or towns that have experienced notable deindustrialization (Blaenau Ffestiniog, Caldicot, Milford Haven), or both.

	Small Town	%	Other urban and fringe	%	Rural	%
Gwynedd	34,595	70.1%		-	14,730	29.9%
Monmouthshire	23,845	68.7%	3,215	9.3%	7,650	22.0%
Pembrokeshire	27,672	65.0%	-	-	14,871	35.0%
Isle of Anglesey	13,135	60.4%	-	-	8,627	39.6%
Ceredigion	17,322	60.1%	-	-	11,520	39.9%
Powys	28,773	53.8%	2,025	3.8%	22,603	42.3%
Denbighshire	17,024	45.6%	13,168	35.2%	7,182	19.2%
Carmarthenshire	19,918	32.1%	24,069	38.8%	18,032	29.1%
Conwy	4,955	12.8%	29,133	75.5%	4,503	11.7%
Rural Wales Total	**187,239**	**50.8%**	**71,610**	**19.4%**	**109,718**	**29.8%**

Table 4.1: Employees by location of workplace, by county, 2001 (adjusted to boundaries of small towns described in appendix B)

High ratio of jobs to working population	
Bangor	2.28
Llangefni	2.28
Carmarthen	2.28
Aberaeron	2.14
Lampeter	2.08
Close to equal ratio of jobs to working population	
Fishguard	1.10
Chepstow	1.09
Llanidloes	0.99
Builth Wells	0.96
Knighton	0.96
Low ratio of jobs to working population	
Crickhowell	0.84
Rhayader	0.76
Milford Haven	0.74
Caldicot	0.71
Pembroke	0.70
Blaenau Ffestiniog	0.69

Table 4.2: Ratio of jobs to working population for selected towns

Population of town	Ratio of jobs to working population			
	>1.75	1.1-1.75	0.9-1.1	<0.9
10,000 +	Bangor Carmarthen Haverfordwest	Abergavenny Aberystwyth Holyhead Newtown	Chepstow	Caldicot Milford Haven
5,000 – 10,000	Llandrindod W Welshpool	Brecon Ruthin	Denbigh Llangollen Fishguard	Pembroke
2,000 – 5,000	Cardigan Lampeter Llangefni	Dolgellau St Asaph Llandeilo	Builth Wells Llanidloes	B Ffestiniog Crickhowell Llanrwst Rhayader
Under 2,000	Aberaeron	Hay on Wye Presteigne	Knighton Rhayader	

Table 4.3: Ratio of jobs to working population compared with total population of town, for selected towns.

4.5 There are also a number of towns who have roughly the same number of people working in the town as working people living there. This cluster appears to represent two different processes at work. Some of these towns also have a relatively high proportion of residents working in the town or its immediate hinterland (travelling less than 2 kilometres to work), despite being relatively close to larger employment centres (table 4.4). This suggests these towns are able to provide employment for a significant proportion of their own residents, but cannot compete with larger towns nearby in providing employment for the surrounding hinterland. Chepstow and Llangollen, however, stand out as exceptions to this dynamic, with fewer than half of working residents employed in the town. In these cases the towns appear to form part of larger commuting fields, with people both travelling in and travelling out of the town to work in significant numbers.

Town	**Ratio of jobs to working population**	**Working population travelling <2km to work**
Monmouth	1.14:1	57%
Fishguard	1.10:1	61%
Chepstow	1.09:1	45%
Llanidloes	0.99:1	58%
Knighton	0.96:1	61%
Builth Wells	0.96:1	54%
Denbigh	0.93:1	54%
Llangollen	0.93:1	47%
Rhayader	0.76:1	57%

Table 4.4: Ratio of jobs to working population and working residents employed in the town or its immediate hinterland for selected towns.

4.6 These observations raise further questions about the relative significance of small and market towns as a source of employment in their local area. As table 4.5 shows, Carmarthen, Aberystwyth and Haverfordwest all account for more than three-quarters of all jobs in a rough ten kilometre radius; whilst at the other extreme, St Asaph and Crickhowell account for fewer than one in ten jobs within the same radius. Unsurprisingly, the relative dominance of a town in the local labour market reflects both the size and location of the town. The larger towns do tend to be more dominant in their immediate areas (table 4.6), but a number of smaller towns in more remote locations, including Bala, Dolgellau and Cardigan also dominate local employment. In contrast, Caldicot, Llangollen and Pembroke are much less significant than other towns of a similar size, reflecting their proximity to larger centres.

4.7 Geographical context can to some extent be controlled for in examining the dominance of a town as the source of employment within its travel-to-work area, as more remote towns tend to have a wider travel-to-work area than those in more densely populated parts of the country. Of the 44 towns listed in Appendix B, 21 are the primary centres in a travel-to-work area, yet the dominance of these towns still varies considerably (table 4.7). Only Holyhead, Newtown and Carmarthen provide more than half of the jobs within their travel-to-work areas. Llandeilo and Lampeter provide less than a quarter of jobs in their travel-to-work areas. Among the towns that are secondary centres in a travel-to-work area, several are substantially overshadowed by the larger centres, providing fewer than one in ten jobs in the area. Knighton and Llandovery, in contrast, provide only marginally fewer jobs than the primary centre in the travel-to-work area (Presteigne and Llandeilo respectively). As such, large parts of rural Wales appear to have a fairly diffuse pattern of employment provision with many small towns significant but dominant sources of employment in their local areas.

High % of total jobs in 10km radius	
Carmarthen	81%
Aberystwyth	78%
Haverfordwest	75%
Dolgellau	74%
Llandrindod Wells	74%
Newtown	74%
Low % of total jobs in 10km radius	
Pembroke	16%
Presteigne	14%
Llangollen	12%
St Asaph	8%
Crickhowell	5%

Figure 4.5: Towns with greatest and lowest concentrations of jobs within a 10km radius

Population of town	Jobs in town as % of all jobs within 10km radius			
	>50%	30-49%	10-29%	<10%
10,000 +	Abergavenny Aberystwyth Bangor Carmarthen Chepstow Haverfordwest Holyhead Newtown	Milford Haven	Caldicot	
5,000 – 10,000	Brecon Fishguard Llandrindod W Welshpool	Denbigh Pembroke Dock Monmouth Ruthin	Llangollen Pembroke	
2,000 – 5,000	Cardigan Dolgellau	B Ffestiniog Lampeter Llangefni Llanidloes Llanrwst Porthmadog Pwllheli	Builth Wells Llandeilo	Crickhowell St Asaph
Under 2,000	Bala	Aberaeron Hay on Wye Newcastle Emlyn Rhayader	Knighton Presteigne	

Figure 4.6: Number of jobs in town as % of all jobs within a 10km radius, structured by population of town.

Primary centre within TTWA		Secondary centre with TTWA	
Holyhead	65%	Knighton	26%
Newtown	52%	Llandovery	20%
Carmarthen	51%	Caernarfon	17%
Aberystwyth	49%	Tenby	16%
Dolgellau	41%	Milford Haven	14%
Fishguard	39%	Blaenau Ffestiniog	13%
Llandrindod Wells	39%	Aberaeron	12%
Haverfordwest	38%	Abergavenny	11%
Pwllheli	38%	Bala	11%
Bangor	36%	Builth Wells	11%
Brecon	36%	Pembroke	11%
Welshpool	36%	Newcastle Emlyn	10%
Presteigne	34%	Denbigh	9%
Ruthin	34%	Hay on Wye	8%
Llangefni	31%	Llanidloes	8%
Pembroke Dock	30%	Monmouth	8%
Cardigan	29%	Chepstow	7%
Machynlleth	29%	St Asaph	6%
Porthmadog	27%	Rhayader	5%
Llandeilo	23%	Caldicot	4%
Lampeter	22%	Llanrwst	3%
		Llangollen	2%
		Crickhowell	1%

Table 4.7: Number of jobs in town as % of all jobs within Travel to Work Area

4.8 The small and market towns of rural Wales therefore exist within a complex web of commuting patterns, in which they are both recipients and suppliers of labour. The volume of commuting is impressive given the populations of the towns concerned. Carmarthen and Bangor both attract over 9000 commuters, equivalent to around six-tenths of their population. These two towns, together with Aberystwyth, Haverfordwest and Newtown unsurprisingly have the largest net flows of commuters into the town (table 4.8), but the ratio of commuters in to commuters out can be more pronounced in smaller towns with significant employers, usually in the public sector. Nearly five times as many people commute into Llandrindod Wells to work as commute out of the town. In Lampeter and Llangefni the ratio is nearly four-to-one, in Aberaeron it is more than three-to-one (table 4.9). These towns therefore act as significant sources of employment for a wider rural area, yet they do so in large part because of the exceptional presence of a large employer such as a county council (or in Lampeter, a university). They do not therefore provide a model that is easily reproduced.

	Net commuters in/out (+/-)	Total number of commuters in	Ratio of commuters in to commuters out
Carmarthen	+7395	9615	4.33
Bangor	+7090	9590	3.84
Aberystwyth	+4335	6245	3.27
Haverfordwest	+4240	6445	2.93
Newtown	+2960	4550	2.86
Caernarfon	+2500	4060	2.89
Llangefni	+2080	2810	3.84
Welshpool	+1870	2620	3.34
Abergavenny	+1815	4475	1.68
Llandrindod Wells	+1780	2250	4.77

Table 4.8: Towns with the largest net number of commuters in.

	Ratio of commuters in to commuters out	Net commuters in/out (+/-)	Total number of commuters in
Llandrindod Wells	4.77	+1780	2250
Carmarthen	4.33	+7395	9615
Bangor	3.84	+7090	9590
Llangefni	3.84	+2080	2810
Lampeter	3.84	+975	1320
Cardigan	3.81	+1370	1855
Welshpool	3.34	+1870	2620
Aberystwyth	3.27	+4335	6245
Aberaeron	3.22	+555	805
Dolgellau	3.16	+645	945

Table 4.9: Towns with the highest ratio of commuters in to commuters out.

4.9 Carmarthen, Bangor, Haverfordwest and Abergavenny may all have large net in-flows of commuters, but they all also have more than 2,000 residents commuting out of the town to work. As such, the influx of commuters reflects not only a surplus of employment opportunities, but also the nature of employment available in the town and elsewhere. Similarly, towns with net out-flows of commuters can reflect both a deficit of employment opportunities in the town but also the selection of the town as a place to live in order to commute to work elsewhere. Thus, whilst Milford Haven and Blaenau Ffestiniog have experienced deindustrialization which has reduced employment opportunities in the town, for Caldicot deindustrialization has replaced one destination of commuting, the Llanwern Steel Works, with a more diverse range of commuting destinations in Cardiff, Newport, Chepstow and Bristol (table 4.10).

	Net commuters in/out (+/-)	Total number of commuters out	Ratio of commuters in to commuters out
Caldicot	-1510	3305	0.54
Milford Haven	-1195	2605	0.54
Pembroke	-710	1450	0.51
Blaenau Ffestiniog	-320	655	0.51
Denbigh	-200	2000	0.90
Llanrwst	-180	630	0.72
Rhayader	-165	320	0.49
Crickhowell	-145	475	0.70
Builth Wells	-60	540	0.89
Knighton	-50	320	0.84

Table 4.10: Towns with the largest net number of commuters out.

4.10 The complexity of the commuting field is also evident in the distances travelled to work. The towns with the highest proportions of the workforce travelling over thirty kilometres to work include not only comparatively remote towns such as Bala and Cardigan, which have extensive geographical hinterlands, but also towns with types of employment demanding particular specialist, technical or professional skills or qualifications (Llandrindod Wells, Lampeter, Carmarthen, Aberystwyth) (table 4.11). Moreover, towns such as Lampeter, Aberystwyth and Cardigan also have significant numbers of residents travelling long distances to work. Nearly one in five employed residents of Lampeter travels over thirty kilometres to work (table 4.12).

Llandrindod Wells	14%
Bala, Cardigan, Carmarthen, Lampeter	11%
Aberystwyth, Brecon, Chepstow, Holyhead, Newtown	10%

Figure 4.11: Towns with greatest proportions of workforce travelling over 30km to work.

Bala	19%
Lampeter	18%
Machynlleth	16%
Monmouth	15%
Cardigan, Llandovery	14%
Aberystwyth	13%
Bangor, Crickhowell, Pwllheli	12%
Abergavenny, Carmarthen, Chepstow, Dolgellau, Knighton, St Asaph	11%
Brecon, Builth Wells, Holyhead, Porthmadog	10%

Figure 4.12: Towns with greatest proportion of residents travelling over 30km to work

4.11 Drawing together this evidence, it is possible to propose a four-fold categorization of small and market towns in rural Wales by their employment characteristics (table 4.13). The first group of towns are dominant centres of employment in their rural areas. They have high ratios of commuters in to commuters out and employ more than 60% of residents in the town. This category mostly comprises larger towns in mid Wales (Carmarthenshire, Ceredigion, Powys and southern Gwynedd). The second group are significant employment centres in a multi-centre commuting field. They also have significant numbers of people commuting in to work, but fewer than 60% of residents are employed in the town with a significant number commuting out to work elsewhere. These towns tend to be the larger towns in the rural areas of north Wales, south east Wales and Pembrokeshire that are both more densely populated and are more accessible to larger urban centres. The third group are self-contained employment centres in limited commuting fields. These towns have lower ratios of commuters in to commuters out, but more than half of residents are employed in the town or its immediate hinterland. They tend to be smaller towns that are more distant from major urban centres. The final group are feeder towns within wider commuting fields. Fewer than half of the residents of these towns work in the town, and there is a net out-flow of commuters. They are all towns with easy access to larger towns or administrative centres.

Dominant centres of employment (Ratio of commuters in:out >1.9; >60% of town's working population employed in town)		**Significant employment centres in multi-centre commuting field** (Ratio of commuters in:out >1.4; <60% of town's working population employed in town)	
Aberystwyth	Lampeter	Aberaeron	Llangefni
Brecon	Llandrindod Wells	Abergavenny	Newcastle Emlyn
Cardigan	Machynlleth	Bangor	Pembroke Dock
Carmarthen	Newtown	Caernarfon	Porthmadog
Dolgellau	Pwllheli	Llandeilo	Ruthin
Haverfordwest	Welshpool	Llandovery	St Asaph
Hay-on-Wye			
Self-contained employment centres with limited commuting field (Ratio of commuters in:out <1.75; >50% of town's working population employed in town)		**Feeder towns within wider commuting field** (Ratio of commuters in:out <1.0; <50% of town's working population employed in town)	
Bala	Llanidloes	Caldicot	Llanrwst
Builth Wells	Monmouth	Chepstow	Milford Haven
Denbigh	Presteigne	Crickhowell	Pembroke
Fishguard	Rhayader	Llangollen	
Holyhead	Tenby		
Knighton			

Figure 4.13: Categorization of towns by nature of commuting and employment patterns.

Commercial, Public and Community Services

4.12 The role of small and market towns as service centres for rural areas includes the provision of both public and commercial services. These two types of provision operate to different dynamics. The provision of public services, as discussed later in this section, is determined through strategic planning and is subject to political pressure to maintain a presence in particular towns. The provision of commercial services, however, is more vulnerable to market forces and consequently many smaller towns have lost key commercial services.

4.13 The banking sector represents one example of the rationalization of commercial services in small town. Banks were once a defining feature of market towns as part of the service provided by the towns to the wider rural area. However, between 1998 and 2003 bank branches were closed in 29 small and market towns in rural Wales (Leyshon et al., 2005). Bank branches in rural Wales are still heavily concentrated in small towns (table 4.14), but only half of the towns responding to the Wales Rural Observatory services survey in 2004 reported that they had a full-time bank branch, and one in eight had no bank branch at all. The provision of building society offices is similarly concentrated, but over half of the small towns surveyed had no building society (table 4.13)

	Small Towns (n=42)		Rural communities (n=269)	
Full-time bank	21	50%	3	1%
Part-time bank	16	38%	7	3%
No bank	5	12%	231	86%
Question not answered	0	0%	28	10%

Figure 4.14: Banking facilities in small towns and rural communities in rural Wales responding to services questionnaire, 2004.

	Small Towns (n=42)		Rural communities (n=269)	
Full-time building society	14	33%	13	5%
Part-time building society	1	2%	1	<1%
No building society	26	62%	226	84%
Question not answered	1	2%	29	11%

Table 4.15: Building Societies in small towns and rural communities in rural Wales responding to services questionnaire, 2004.

4.14 The hierarchy of service provision between small and market towns in rural Wales that the banking figures suggest is reinforced by the geographical distribution of supermarkets. The major supermarket chains (Tesco, Asda, Morrisons, Sainsburys and Waitrose) had 29 stores in the nine counties of rural Wales in February 2006, of which 22 were located in small or market towns and none in rural communities (table 4.16). As some towns, including Bangor and Carmarthen, had more than one of the major supermarkets, this concentration is even greater than this figure suggests, with stores in just 18 towns (see appendix H). The smaller supermarket chains (Somerfield, Kwiksave, Lidl and Co-op), had more stores in the region, with a greater geographical spread. However, as table 4.17 shows, whilst all small and market towns in rural Wales with a population of over 5,000 had a supermarket of some nature, 60% of towns with a population of less than 5,000 did not have a supermarket. The 5,000 population line hence appears as a critical threshold. The presence of a supermarket in a town can draw in shoppers and help the town to maintain its service centre function; towns without a supermarket, however, risk losing trade to towns with stores.

	Major Supermarkets		Smaller Supermarkets	
Small towns	22	76%	78	83%
Urban or fringe areas	7	24%	13	14%
Rural communities	0	0	3	3%

Table 4.16: Location of supermarkets in rural Wales, February 2006.

	Over 10,000	5,000 -9,999	2,000-4,999	Under 2,000
2 major supermarkets & 1 or more smaller supermarkets	3 (30%)	1 (9%)	0 (0%)	0 (0%)
1 major supermarket & 1 or more smaller supermarkets	6 (60%)	5 (45%)	2 (6%)	0 (0%)
1 major supermarket only	0 (0%)	0 (0%)	1 (3%)	0 (0%)
2 or more smaller supermarkets only	0 (0%)	2 (18%)	5 (14%)	0 (0%)
1 smaller supermarket only	1 (10%)	3 (27%)	13 (36%)	5 (16%)
No supermarket	0 (0%)	0 (0%)	15 (42%)	27 (84%)

Table 4.17: Supermarket facilities in small towns in rural Wales, compared with population size, February 2006. Small towns as listed in appendix A.

4.15 The continuing importance of small towns in providing public services for the rural population is demonstrated by the geographical distribution of healthcare facilities, police stations, secondary schools and libraries across rural Wales. Ninety-five percent of the small towns responding to the Wales Rural Observatory services survey in 2004 reported that they had at least one GP surgery or health centre, compared with just over 14% of smaller rural communities (table 4.18). Eighty-six percent reported that they had at least one pharmacy, compared to only 7% of smaller communities (table 4.19). In cases where towns reported that they had no pharmacy, it may be that doctors dispense prescriptions; NHS regulations, updated in 2005, allow GPs in practices where the total of all patient lists for the area within a radius of 1.6km (1 mile) is fewer than 2750 to dispense NHS prescriptions. Sixty-one percent of small towns reported that they had at least one dental practice, compared with less than 1% of smaller rural communities; however, over a third of small towns reported that they had no dental practice (table 4.20).

	Small Towns (n=42)		Rural communities (n=269)	
2 or more GP surgeries or healthcentres	8	19%	1	<1%
1 GP surgery or healthcentre	32	76%	39	14%
No surgery or healthcentre	2	5%	202	75%
Question not answered	0	0	27	10%

Table 4.18: GP surgery or healthcentre facilities in small towns and rural communities in rural Wales responding to services questionnaire, 2004.

	Small Towns (n=42)		Rural communities (n=269)	
2 or more pharmacies	12	29%	4	1%
1 pharmacy	24	57%	17	6%
No pharmacy	6	14%	223	83%
Question not answered	0	0	25	9%

Table 4.19: Pharmacy facilities in small towns and rural communities in rural Wales responding to services questionnaire, 2004.

	Small Towns (n=42)		Rural communities (n=269)	
2 or more dental surgeries	9	21%	1	<1%
1 dental surgery	17	40%	1	<1%
No dental surgery	15	36%	240	89%
Question not answered	1	3%	27	10%

Table 4.20: Dental surgeries in small towns and rural communities in rural Wales responding to services questionnaire, 2004.

4.16 Hospital facilities in rural Wales are concentrated in larger small towns (table 4.21). Eight of the ten towns with a population of over 10,000 have a hospital, along with two thirds of towns with a population of between 5,000 and 9,999. In contrast, only 10% of towns with a population of less than 2,000 support any sort of hospital facility. This suggests that the provision of hospital facilities is to some degree a function of settlement size, with 2,000 being the critical population threshold. However, settlement size is not the only factor at work; being a 'larger small or market town' does not guarantee the provision of a hospital. Of the 10 small towns in rural Wales with populations of over 10,000, two have no hospital, along with a third of all small towns with populations of between 2,000 and 5,000. Hospitals with accident and emergency (A&E) facilities are present only in towns with a population of over 10,000, but again the presence or absence of A&E facilities is more than a function of settlement size; of the eight hospitals in these towns, three have no A&E department.

	Population of town			
	Over 10,000	5,000 -9,999	2,000-4,999	Under 2,000
Hospital with A&E facilities	5 (50%)	0 (0%)	0 (0%)	0 (0%)
Hospital without A&E facilities	3 (30%)	7 (64%)	18 (64%)	3 (10%)
No hospital	2 (20%)	4 (36%)	20 (36%)	27 (90%)

Table 4.21: Hospitals in small towns in rural Wales, 2006, compared with population size. Small towns as listed in appendix A.

4.17 Small towns also serve as the major component of the operational base for the police service in rural Wales. All of the six divisional police HQs in rural Wales are based in small towns and small towns also host the majority (81%) of police stations in rural areas (table 4.22). However, there is a clear hierarchy within small and market towns (table 4.23). All towns with a population of over 10,000 have a police station, as do all but one of the towns with a population of between 5,000 and 10,000. Unsurprisingly, these larger small or market towns are also the location of police divisional HQs. Just over half of towns with a population of less than 5,000 but more than 2,000 have a police station, which leaves close to a half without. Almost two thirds of towns under 2,000 have no police station. This suggests that the 5,000 population line is a critical threshold, but that for small or market towns with a population of less than 5,000 the presence or absence of a police station is governed by factors other than just level of population.

	Police Divisional HQ		Police Stations	
Small towns	6	100%	47	81%
Urban or fringe areas	0	0%	8	14%
Rural areas	0	0%	3	5%

Table 4.22: Location of police stations in rural Wales, 2006.

	Population of town			
	Over 10,000	5,000 -9,999	2,000-4,999	Under 2,000
Police Divisional HQ	3 (30%)	2 (18%)	1 (2%)	0 (0%)
Police Station	7 (70%)	8 (73%)	23 (53%)	9 (35%)
No Police Station	0 (0%)	1 (9%)	19 (44%)	17 (65%)

Table 4.23: Police Stations in small towns in rural Wales 2006, compared with population size. Small towns as listed in appendix A.

4.18 The distribution of court services in rural Wales, however, is more limited and less closely follows population hierarchies. With the exception of county courts in Llanelli and Rhyl, and magistrates' courts in Llanelli and Prestatyn, all courts in the nine counties of rural Wales are located in small and market towns (table 4.24). However, it is not necessarily the largest towns that have the highest-order court facilities (table 4.25). Welshpool, for example, stands out as the location of a crown court, a county court and a magistrates court, making it the primary legal centre in mid Wales. Caernarfon similarly is the location of the crown court in north west Wales, not Bangor, whilst the only other crown court in rural Wales is located in Dolgellau (see also appendix I).

	Crown court	County court	Magistrates' courts
Small towns	3	7	16
Urban or fringe areas	0	2	3
Rural areas	0	0	0

Table 4.24: Location of courts in rural Wales, 2006.

	Population of town			
	Over 10,000	5,000 -9,999	2,000-4,999	Under 2,000
Crown Court	0	2	1	0
County Court	3	3	1	0
Magistrates' Courts	7	5	4	0
No court	2	5	39	26

Table 4.25: Courts in small towns in rural Wales, 2006, compared with population size. Small towns as listed in appendix A.

4.19 A clear settlement hierarchy across small towns in rural Wales is also evident in the distribution of secondary schools and colleges of further education (table 4.26). There is at least one secondary school in all small towns with a population of over 10,000 and all but one of the small towns with a population of less than 10,000 but more than 5,000 (table 4.27). In contrast, more than half of all small towns with a population of less than 5,000 and more than two thirds (69%) of small towns with a population of under 2,000 have no secondary school. Colleges of further education are present in all small towns with a population of 10,000 but in less than 1 in 10 of small towns with a population of less than 5,000. As with banking, hospitals and policing, the 5,000 population line hence appears as a critical threshold.

	FE Colleges		Secondary Schools	
Small towns	17	77%	61	75%
Urban or fringe areas	4	18%	15	19%
Rural areas	1	5%	5	6%

Table 4.26: Location of Further Education Colleges and Secondary Schools in rural Wales, 2006. Small towns as listed in appendix A.

	Population of town			
	Over 10,000	5,000 -9,999	2,000-4,999	Under 2,000
FE Colleges	10 (100%)	4 (36%)	4 (9%)	0 (0%)
Secondary Schools	10 (100%)	10 (91%)	24 (52%)	8 (31%)
No College or Secondary School	0 (0%)	1 (9%)	18 (39%)	18 (69%)

Table 4.27: FE Colleges and Secondary Schools in small towns in rural Wales, 2006, compared with population size. Small towns as listed in appendix A.

4.20 Public leisure facilities in rural Wales are almost entirely based in small towns, although a substantial proportion of small towns lack a permanent library, swimming pool or sports hall. Ninety percent of small towns responding to the survey of rural services carried out by the Wales Rural Observatory in 2004 reported that they had a permanent library, compared to only 3% of smaller rural communities (table 4.28). The remainder, like the majority of smaller communities, reported that they were served by a mobile library based in a larger urban centre. The same survey suggested that whilst public swimming pools are far more evident in small towns than in smaller rural communities, over half (57%) of small towns do not have a public swimming pool (table 4.29). Two thirds of small towns reported that they had a sports hall, suggesting that a third were without (table 4.29).

	Small Towns (n=42)		Rural communities (n=269)	
Permanent library	38	90%	9	3%
Mobile library only	4	10%	210	78%
No library facilities	0	0	50	19%
Question not answered	0	0	0	0

Table 4.28: Library facilities in small towns and rural communities in rural Wales responding to services questionnaire, 2004.

	Small Towns (n=42)		Rural communities (n=269)	
Public swimming pool	18	43%	16	6%
Sports Hall	28	67%	28	10%

Table 4.29: Sports facilities in small towns and rural communities in rural Wales responding to services questionnaire, 2004.

4.21 Small towns can also serve as the social hubs for rural districts for associational activity as well as for fixed social infrastructure. Our surveys show that local clubs and societies in rural Wales also tend to be concentrated in small towns, but to a lesser degree than public services (table 4.30). From the responses to the Wales Rural Observatory survey of rural services, it appears that football and rugby clubs, arts and music societies and activities for young people (youth clubs, Scouts and Guides, but not the Urdd) are the most heavily centred on small towns. In comparison, Young Farmers' Clubs and Welsh language-based institutions (Urdd and Eisteddfodau) are distributed more evenly between small or market towns and rural communities; Young Farmers' Clubs are as much a feature of smaller rural communities as they are of small or market towns. These figures suggest that whilst the majority of small towns are important centres for cultural and leisure pursuits in rural areas, they are less important in this respect than in respect to other services.

4.22 Community support services in rural areas are to a large degree centred in small towns; at the same time, a significant proportion of small towns lack these services (table 4.31). Support services for the homeless, the unemployed, those with drug problems and those suffering from domestic problems are almost entirely restricted to small towns, but out of the 42 small towns responding to the Wales Rural Observatory survey of rural services in 2004, less than a quarter reported that they offered support for drug problems and less than 15% reported that they offered support for the homeless, unemployed or those suffering from domestic violence. Less than half of the small towns responding to the same survey reported that they had support services for young people or people with disabilities, although small towns were far more likely to offer support than smaller rural communities. Over half of small towns reported that they had support services for the elderly, compared to a third of smaller rural communities.

	Small Towns (n=42)		Rural communities (n=269)	
Football or rugby club	38	90%	101	38%
Arts or music club	32	76%	70	26%
Eisteddfodau	16	38%	71	26%
Show	24	57%	122	45%
Scouts	19	45%	29	11%
Guides	26	62%	47	17%
Youth Club	30	71%	91	34%
Urdd	15	36%	82	30%
Young Farmers' Club	15	36%	96	36%

Figure 4.30: Selected clubs and societies in small towns and rural communities in rural Wales responding to services questionnaire, 2004.

Target group	Small Towns (n=42)		Rural communities (n=269)	
Elderly	24	57%	88	33%
Young people	16	38%	38	14%
Disabilities	12	32%	33	12%
Unemployed	5	14%	3	1%
Homeless	4	11%	5	2%
Drug problems	8	22%	4	1%
Domestic violence	7	19%	3	1%

Figure 4.31: Support services present in small towns and rural communities in rural Wales responding to services questionnaire, 2004.

4.23 Drawing together this evidence, it is possible to suggest a four-fold categorization of small and market towns in rural Wales according to their roles as service centres for rural areas (figure 4.32). Because this categorization is based on aggregate data for all small or market towns rather than on particular data for individual towns, and because not all of the data on services, can be disaggregated according to population size, it is more provisional than the categorisation of small and market towns by employment characteristics and focuses on the presence or absence of five key services – GP surgeries or healthcare centres, supermarkets, hospitals, police stations and secondary and further education.

4.24 Towns in the first group are low order service centres. They may provide some commercial and community services to their immediate rural hinterland, whilst a substantial number have a secondary school, and almost all have a GP surgery or healthcare centre. They offer no supermarket, no hospital and no police station. This category comprises the vast majority of towns with a population of less than 2,000 and a substantial proportion of towns with a population of more than 2,000 but less than 5,000. The geographical reach of the service function of such towns is typically limited to the town and its immediately neighbouring rural communities, and the town itself is likely to be heavily reliant on a larger town for higher-order service provision.

4.25 Towns in the second group are lower-middle order service centres. Alongside whatever commercial and community services they provide for their rural hinterland, they have a secondary school, a GP surgery or healthcare centre, at least one small supermarket and a police station. A substantial number also have a hospital. This category largely comprises those towns with a population of between 2,000 and 4,999 that are not lower order service centres, but also includes some towns with a population of between 5,000 and 9,999. The geographical reach of the service function is these towns is more extensive than the first group, covering a sub-county district that in some more sparsely population parts of rural Wales might extend for ten to twenty kilometres around the town. The town is also more likely to compete with nearby larger towns for trade and custom from the intervening rural area.

4.26 Towns in the third group are higher-middle order service centres. They all have a GP surgery or healthcare centre, secondary school, police station and hospital, and offer a choice of supermarkets that includes at least one of the major supermarket chains (Tesco, Asda, Morrisons, Sainsburys and Waitrose). A substantial number also have a college of further education. This category comprises those towns with a population of between 5,000 and 9,999 that are not lower-middle order service centres along with the majority of towns with a population of over 10,000. The geographical reach of the service function of towns in this group may extend across a county, or at least the larger part of one, to a distance of 30 kilometres or more. For most routine commercial and public services these towns will generally be the dominant centre in their locality.

4.27 Towns in the fourth group are higher order service centres. Along with the services provided by higher-middle order service centres, they offer at least one major supermarket and usually a choice of supermarkets, a college of further education, and in three cases have hospitals with A&E facilities. Only towns with a population of more than 10,000 fall into this category. These towns can be described as sub-regional centres with a geographical reach extending across a large part of rural Wales.

4.28 It is evident that to some degree the service role of small or market towns is related to settlement size: the larger the town, the higher level of services it offers. It would be unwise to posit the relationship between population size and service role as a functional or causal relationship, given the varied service role of towns with similar sizes of population and the likely influence of other factors – such as relative proximity to larger urban centres – on service provision. However, the 2,000 and 5,000 population thresholds do appear to provide a rough indication of the likelihood of a town possessing particular services and facilities. The majority of small towns with populations of less than 2,000 fall into the lower-order service centre category. Towns with populations between 2,000 and 5,000, in contrast, tend to be in the lower-middle order service centre category.

Finally, towns in the higher-middle and higher order service centre categories tend to have a population of more than 5,000. The distinction between these two top-end categories is not necessarily related to population but may also reflect geographical context.

Lower order service centres *Provide* GP surgery or healthcare centre *Possible provision* Secondary school, Small supermarket *Examples* Bala, Blaenau Ffestiniog, Llanrwst, Llangollen, Crickhowell, Presteigne, Aberaeron, Pembroke	**Lower-middle order service centres** *Provide* GP surgery or healthcare centre, secondary school, at least one small supermarket, police station *Probable provision* Hospital *Examples* Llangefni, Dolgellau, Portmadog, Pwllheli, Ruthin, St Asaph, Builth Wells, Llanidloes, Machynlleth, Lampeter, Fishguard, Tenby, Llandeilo, Llandovery, Newcastle Emlyn, Caldicot, Monmouth
Higher-middle order service centres *Provide* GP surgery or healthcare centre, secondary school, police station, hospital, choice of supermarkets usually inc. at least one major chain *Possible provision* FE college *Examples* Holyhead, Denbigh, Brecon, Llandrindod Wells, Welshpool, Cardigan, Chepstow, Abergavenny.	**Higher order service centres** *Provide* GP surgery or healthcare centre, secondary school, police station, hospital, at least one major supermarket, college of further education *Possible provision* A&E department *Examples* Bangor, Caernarfon, Newtown, Aberystwyth, Haverfordwest, Carmarthen.

Figure 4.32: Categorization of towns by nature of service function (presence or absence of police station, supermarket, hospital, secondary school / FE college)

CHAPTER 5: SMALL TOWNS AS CENTRES OF SOCIAL AND ECONOMIC DEVELOPMENT IN RURAL WALES

Introduction

5.1 The potential significance of small and market towns as key sites of investment for stimulating economic growth in rural Wales has long been recognised in economic policy for Wales. Policy from the 1970s to the 1980s focused initially on developing small and market towns as growth poles and later on as the pivots of community-led regeneration; the Market Towns Initiative established by the Development Board for Rural Wales in 1996 envisaged that development in the towns would benefit the wider rural area in which they were located. In more recent years, small and market towns have continued to be identified as centres for social and economic development in rural Wales through the Wales Spatial Plan.

5.2 The assumption that investment in small and market towns could act as a driver for economic growth in wider rural areas was questioned by the 'Dynamic Smaller Towns: Identification of Critical Success Factors' report presented to the Welsh Assembly Government in 2004 (Brown et al., 2004). Its analysis of data on 369 small towns and 55 residual rural areas across England and Wales, along with comparative data on 24 case study areas that included 11 towns in rural Wales, found that although housing growth was faster in the small towns than in the residual rural areas, employment growth between 1995 and 2000 had on average been stronger in residual rural areas than in the small towns. In addition, the case study analysis revealed significant variability in the performance of different towns (table 5.1).

	Increase in jobs (actual) in town	Increase in jobs (%) in town	Increase in jobs (%) in surrounding rural area
Aberystwyth	2750	42.4%	69.5%
Fishguard	300	22.5%	0.0%
Bala	100	18.2%	-5.1%
Machynlleth	100	8.2%	4.3%
Newcastle Emlyn	100	10.4%	10.3%
Brecon	250	6.4%	22.8%
Presteigne	<50	4.6%	n/a
Abergavenny	-400	-5.2%	22.8%
Bangor	-1200	-9.7%	0.0%
Llanidloes	-100	-10.7%	0.8%

Table 5.1: Employment Growth in Selected Small Towns and Surrounding Rural Areas, 1995-2000.
(Source: Brown et al. 2004, 'Dynamic Smaller Towns' report)

5.3 This chapter examines the extent to which small and market towns serve as key centres of social and economic development in rural Wales by examining in turn three indicators. Firstly it looks for evidence of job creation in small and market towns, analyzing both changes in the number of Jobseekers' Allowance claimants and reports of new job creations and job losses in rural Wales. Secondly, it charts and analyses the geographical distribution of economic investment through the European Structural Funds (Objective 1 and Objective 2) between 2000 and 2005. Thirdly, it similarly examines the geographical distribution of social investment through the Community Fund of the National Lottery Charities Board between 1995 and 2005.

Job Creation in Small and Market Towns

5.4 As noted above, the Dynamic Smaller Towns report suggested that, as a general trend, levels of job creation in small towns during the late 1990s were outpaced by job creation in the surrounding rural areas. However, its analysis of eleven case study towns in Wales, as shown in table 5.1, further suggested that this general pattern is subject to considerable local variation. Of the eleven towns examined, Aberystwyth experienced a high level of job creation in both the town and the surrounding rural area, whilst Fishguard, Bala and Machynlleth all recorded significantly greater employment growth in the town than in the rural hinterland. In contrast, Brecon and Abergavenny were reported to have lower levels of job creation than their rural hinterland, and in Bangor and Llanidloes decreasing employment levels in the town were contrasted to stable numbers of jobs in the residual rural area.

5.5 Accurate figures for job creations are difficult to find at a spatial scale that permits comparison of small towns and surrounding rural areas. In order to extend the analysis in the Dynamic Smaller Towns report and to test the patterns that they indicate, we have accordingly turned to two proxy datasets, both of which are problematic in their own way.

5.6 The first dataset we interrogate is the recorded numbers of income-based claimants of Jobseeker's Allowance, for which we have access to time series data at the ward-level. As Jobseeker's Allowance is paid to individuals searching for employment, decreasing numbers of claimants may in broad terms be associated with job creation. However, there are a number of qualifications that must be added to this analysis. Firstly, ward level data for the number of claimants is rounded to five, such that the figures quoted here are approximations not accurate measures. This is particularly significant in examining trends over time in towns with low numbers of claimants. Secondly, in some areas the figures over time may have been affected by alterations in ward boundaries. Similarly, data for 2004 is published by census output area not by ward, as had been the practice previously, and therefore is not directly comparable. For this reason our analysis covers only the period 1998 to 2003. Thirdly, the general decrease in the number of claimants of Jobseeker's Allowance is not only the product of job creation but also reflects changes in eligibility for the allowance. At a local level, the number of claimants is affected by migration as well as job creation, including so-called 'welfare migration' whereby individuals who are entitled to claim the same level of benefit wherever in the country that they live move to areas with a lower cost of living or other lifestyle benefits. This can include welfare claimants moving from cities into small towns, and, more locally, claimants moving from rural communities into small towns to access housing. Welfare migration is likely to have been a factor in the increase in the number of Jobseeker's Allowance claimants in Llandrindod Wells recorded between 1998 and 2000. Finally, as the figures relate to place of residence rather than place of work, a fall in claimants in a town does not necessarily correspond with job creation in that town, but may reflect residents finding employment elsewhere.

5.7 The above caveats notwithstanding, the Jobseeker's Allowance data do however reveal two broad trends that appear to support the findings of the Dynamic Smaller Towns report. Firstly, in most parts of rural Wales the number of income-based Jobseeker's Allowance claimants has fallen more slowly in small and market towns than in the rest of the county (table 5.2). The only counties where this is not the case are Conwy and Denbighshire (where the rate of decrease is slower still in the largely urban North Wales coastal zone), and Monmouthshire, which our earlier analysis has shown to have a complex pattern of commuting flows.

		Total claimants			Change 98-03	
		1998	2000	2003	No	%
Carmarthenshire	Small towns	535	515	350	-185	-35%
	Rest of county	2130	1940	1320	-810	-38%
Ceredigion	Small towns	515	440	285	-230	-45%
	Rest of county	610	445	285	-325	-53%
Conwy	Small towns	325	260	135	-190	-58%
	Rest of county	1555	1260	835	-720	-46%
Denbighshire	Small towns	330	230	155	-175	-53%
	Rest of county	1070	860	640	-430	-40%
Gwynedd	Small towns	1930	1465	995	-935	-48%
	Rest of county	970	670	420	-550	-57%
Isle of Anglesey	Small towns	1005	805	600	-405	-40%
	Rest of county	845	595	435	-410	-49%
Monmouthshire	Small towns	770	540	330	-440	-57%
	Rest of county	335	220	165	-170	-49%
Pembrokeshire	Small towns	1785	1480	905	-880	-49%
	Rest of county	615	450	295	-320	-52%
Powys	Small towns	645	585	440	-205	-32%
	Rest of county	700	585	430	-270	-39%

Table 5.2: Income-based Jobseeker's Allowance Claimants in rural Wales, 1998, 2000 and 2003. Small towns as listed in appendix A.

5.8 Secondly, the figures for income-based Jobseeker's Allowance claimants again reveal considerable variations between different towns in rural Wales. Excluding those towns with very low numbers of claimants (20 or fewer), the most significant decreases in the number of claimants have tended to be in either larger towns in south east Wales (Abergavenny, Chepstow), small towns in north Wales within commuting distance of larger centres (Llanrwst, Penmaenmawr, Menai Bridge) or remoter towns near the west Wales coast (Aberystwyth, Dolgellau, Pwllheli) (table 5.3). This pattern corresponds with other evidence of economic growth in these areas.

5.9 In contrast, the smallest decreases in the number of claimants tend to have been in towns in the interior of rural Wales in Powys and Carmarthenshire, as well as in towns with a historically stronger industrial base such as Llangefni and Cardigan (table 5.4). Carmarthenshire and Powys as a whole have the lowest decreases in the number of claimants in rural Wales, and two towns in these counties, not listed in table 5.4, Llandeilo and Presteigne, recorded small increases in the number of Jobseeker's Allowance claimants between 1998 and 2003. Newtown and Llandrindod Wells also both recorded small increases in the number of claimants between 1998 and 2000. Thus, whilst the towns in these areas have increased in population in recent years, these figures suggest that the population growth is not necessarily driven by migrants moving to the town for employment as a consequence of the creation of new jobs (see also appendix J).

5.10 The second dataset drawn on in this analysis are the reports of job creations and job losses in the UK Activity Report, published on-line by the UK Business Park. Whilst this listing is incomplete and therefore cannot be regarded as a comprehensive record of job creations and losses in the region – there a number of significant developments and site closures that we are aware of that are not reported – it does give a rough indication of the broad trends in private sector investment.

5.11 On this basis, there are again three general trends that can be extracted from these data. Firstly, in apparent contradiction to the findings of the Dynamic Smaller Towns report, the majority of new jobs in rural Wales reported by the UK Business Park are located in small and market towns (table 5.5). Moreover, reported job creations in small towns are more than double the number of reported job losses; whilst reported job losses for the residual rural areas in the region exceed reported job creations. This would seem to support the original contention that small towns are the key sites of economic investment in rural Wales.

5.12 Secondly, the reports also suggest that the economic base of small towns in rural Wales is broadening, when the sector or function of the new jobs created are compared with those of the jobs reported to be lost (table 5.6). However, this trend is not unreservedly positive. The largest areas of job creation are in call centres and retail, both economic sectors associated with low-skill, low-paid and often part-time employment. Furthermore, the vulnerability of the call centre sector in particular is highlighted by the fact that the 800 reported job creations in small towns in the sector are partially off-set by over 200 job losses as a result of the relocation of call centre functions off-shore. Hence, questions can be raised as to whether job creations in small towns in rural Wales are qualitative improvements to the employment base, and whether they are sustainable in the long term.

	Total claimants			Change 1998-2003	
	1998	2000	2003	Number	%
Chepstow	140	95	35	-105	-75%
Llanrwst	75	50	25	-50	-67%
Tenby	100	65	35	-65	-65%
Caldicot	150	105	60	-90	-60%
Dolgellau	75	40	30	-45	-57%
Penmaenmawr	125	95	55	-70	-56%
Menai Bridge	90	60	40	-50	-55%
Tywyn	55	50	25	-30	-55%
Pwllheli	75	45	35	-40	-53%
Abergavenny	335	265	160	-175	-52%
Aberystwyth	320	250	155	-165	-52%
Pembroke	210	210	100	-110	-52%

Table 5.3: Small towns with the largest decreases in numbers of income-based Jobseeker's Allowance claimants, 1998-2003. (Not including towns with 20 or fewer claimants)

	Total claimants			Change 1998-2003	
	1998	2000	2003	Number	%
Llandrindod Wells	110	125	100	-10	-10%
Newtown	100	105	85	-15	-15%
Llangefni	120	105	95	-25	-21%
Carmarthen	215	215	155	-60	-28%
Deinolen	50	40	35	-15	-30%
Welshpool	65	60	45	-29	-31%
Cardigan	95	105	65	-30	-32%
Fishguard	85	75	55	-30	-35%
Bethesda	130	100	85	-45	-35%
Trimsaran	55	50	35	-20	-36%

Table 5.4: Small towns with the smallest decreases in numbers of income-base Jobseekers' Allowance claimants, 1998-2003. (Not including towns with 20 or fewer claimants)

5.13 Finally, the reports of job creations and losses also emphasize the geographical variation in the experiences of different towns in rural Wales. Although the dataset is incomplete and cannot therefore be used for a robust comparison of towns, it does point towards substantial investment and employment growth in towns such as Aberystwyth, Bangor and St Asaph, whilst suggesting a more complicated picture in towns such as Llangefni and Newtown, where both significant job creations and significant job losses are reported (see appendix K). This is notable given that Llangefni and Newtown are among the towns with the smallest decreases in the number of Jobseeker's Allowance claimants.

	Jobs created	Jobs lost
Small towns	3040	1325
Urban and fringe areas	650	400
Rural communities	980	1245

Table 5.5: Significant job creations and job losses in rural Wales reported in the UK Business Park Activity Report, 2000-2005 (www.ukbusinesspark.co.uk)

	Jobs created	Jobs lost
Call centres	800	265
Retail	590	-
Public administration	500	-
Manufacturing/Engineering	480	655
Distribution	210	225
IT/Technology	180	-
Food processing	135	100
Corporate administration	85	-
Transport	55	-
Tourism	-	15

Table 5.6: Sector or function of jobs creations and job losses in small towns in rural Wales reported in the UK Business Park Activity Report, 2000-2005 (www.ukbusinesspark.co.uk).

5.14 The evidence for small and market towns acting as the centres for economic development in terms of job creation is therefore both patchy and mixed. There is some evidence that small towns are more likely to be the site of major investments that create significant numbers of new jobs, but there is also evidence that suggests that the rate of job creation is proportionately greater in the residual rural areas. Moreover, there are notable variations between towns in rural Wales in terms of levels of job creation, suggesting that certain towns, particularly in north, west and south-east Wales are favoured as sites for invested, whilst towns which benefited from substantial development agency-sponsored investment in the 1970s and 1980s, including Newtown and Llangenfi, are finding new investment off-set by job losses in the manufacturing sector developed in the earlier period.

European Structural Funds

5.15 Between 2000 and 2005, the European Regional Development Fund delivered a total of £204.3 million in funding to county partnerships covering the rural zones of the Objective 1 and Objective 2 regions in Wales. The majority of this funding (£192.8 million) went to rural areas in the Objective 1 region; the remainder (£11.5 million) went to rural areas in the Objective 2 region. The rural zone of the Objective 1 region comprises the counties of Carmarthenshire, Ceredigion, Conwy, Denbighshire, Gwynedd, Pembrokeshire, and Ynys Mon; the rural zone of the Objective 2 region comprises the counties of Powys and Monmouthshire. In both the Objective 1 and the Objective 2 regions, much of the ERDF funding delivered to rural areas has been awarded to initiatives based in small or market towns.

5.16 The focus on small or market towns is most evident in the Objective 1 area (table 5.7). The programme document for the West Wales and the Valleys Objective 1 area does not specifically mention small and market towns as a distinctive unit or scale through which Objective 1 measures could be delivered. In practice, however, well over a quarter of the 325 grants awarded between 2000 and 2005 were for initiatives based in small towns. Moreover, these grants in total amounted to 41% of the total ERDF funding in the Objective 1 area over this period. In comparison, residual rural areas received 19% of the total grants awarded and 13% of the total ERDF funding – less than a third of the funding received by small towns – and urban fringe areas received 10% of the total grants awarded and 10% of the total ERDF funding – less than a quarter of the funding received by small towns. Whilst the largest number of grants went to projects that either had no fixed location or were based on multiple sites of investment, in terms of monetary value these grants amounted to significantly less of the total ERDF funding than the grants awarded to small towns. Small towns received the highest per capita value of grants awarded for fixed location projects.

5.17 The programme document for the Objective 2 area specifically identified small towns as appropriate sites for economic investment. Its Rural Strategy included helping 'towns and large villages develop as attractive locations for business…develop a greater, albeit limited, critical mass, and take advantage of existing strengths such as their tourist profile'. It also emphasised the need for 'community development strategies' to 'embrace the small towns of the region'. Despite this, the majority of grants (52 out of 75) and funding (69%) in the Objective 2 area supported initiatives with no fixed location or with multiple sites of investment (table 5.7). Twenty-three grants were awarded to projects in fixed locations, representing total funding of £4,226,800. Close to two thirds (14) of these grants, representing 58% of the total funding awarded to initiatives in fixed locations, went to small towns. Other grants to projects with a single fixed location went to residual rural areas; there were no grants to urban and urban fringe areas, reflecting the relative lack of larger urban areas in the two rural counties with Objective 2 status. Initiatives based in small towns received close to a fifth of the 75 ERDF grants awarded to the Objective 2 region between 2000 and 2005 and in terms of monetary value over a fifth of the total ERDF funding over this period. The per capita value of grants awarded to fixed location projects was higher across small towns than across residual rural areas.

	Number of grants awarded		Total value of grants	
Objective 1 area (Carmarthenshire, Ceredigion, Conwy, Denbighshire, Gwynedd, Pembrokeshire, Ynys Mon)				
Small towns	92	28%	£78,564,837	41%
Other urban and fringe areas	34	10%	£28,365,490	15%
Rural areas	63	19%	£25,764,673	13%
No fixed location/ multi-site	136	42%	£60,048,045	31%
Total	325	100%	£192,743,045	100%
Objective 2 area (Monmouthshire, Powys)				
Small towns	14	19%	£2,436,571	21%
Other urban and fringe areas	0	0%	£0	0%
Rural areas	9	12%	£1,790,229	15%
No fixed location/ multi-site	52	69%	£7,350,220	63%
Total	75	100%	£11,577,020	100%

Table 5.7: ERDF grants made through county partnerships under Objective 1 and Objective 2 of the EU Structural Funds, 2000-Dec 2005.
Source: WEFO

5.18 The significance of small towns as sites for the delivery of economic investment in the form of ERDF funding varies significantly between the different rural local authorities (table 5.8). In Pembrokeshire, Ynys Mon and Monmouthshire, over 60% of ERDF funding between 2000 and 2005 went to initiatives in small towns. The majority of the remaining funding in these local authorities went to initiatives based in multiple sites or with no fixed location. In Ceredigion, Denbighshire and Gwynedd, small towns received between 42% and 52% of ERDF funding. The distribution of the remaining funding differed notably between the three counties: in Ceredigion, the majority went to residual rural areas; in Gwynedd, the majority went to initiatives based in multiple sites or with no fixed location; and in Denbighshire, the majority of remaining funding was split almost equally between urban / urban fringe areas and initiatives based in multiple sites or with no fixed location.

5.19 In Carmarthenshire, Conwy and Powys, the proportion of ERDF funding awarded to small towns was notably lower than in the other six rural counties, ranging from 5% in Conwy to 13% in Carmarthenshire. In Conwy, the majority of funding has been awarded to urban and urban fringe localities, followed by residual rural areas. Across Carmarthenshire and Powys, significantly more funding has been awarded to projects based in multiple sites or with no fixed location than in any other of the nine rural counties – 49% in the case of Carmarthenshire and 70% in the case of Powys. The relatively low significance of market towns as sites of economic investment in these local authorities thus appears to reflect economic development strategies in which inward investment is targeted at the local authority area as a whole rather than at specific localities, whether small towns, urban and urban areas or residual rural areas.

5.20 This variation between rural local authorities in the significance of small towns as sites of economic investment to a limited extent reflects the differing significance of small and market towns in terms of the population distribution of the different rural local authorities (table 5.9). Overall, the proportion of

ERDF funding awarded to initiatives based in small towns is higher in local authorities with a relatively high proportion of their population living in small towns and lower in rural authorities with a relatively low proportion of their population living in small towns. With the exception of Denbighshire, small towns also tend to be the most significant sites for economic investment in local authority areas where none or relatively little of the population lives in urban / urban fringe areas. This is particularly true when only grants to projects with a fixed location are considered. In Gwynedd, Pembrokeshire and Ynys Mon over 80% of such grants have been awarded to projects in small towns, clearly identifying these communities as the key sites of economic investment. In the Objective 2 zone, however, Powys stands out with only 37% of grants for projects with a fixed location going to small towns, despite small towns constituting 40% of the county's population.

	Small Town	Other urban and fringe areas	Rural areas	No fixed location / multi-site
Objective 1 area				
Carmarthenshire	£4,561,548 (13%)	£9,424,323 (27%)	£3,729,153 (11%)	£17,251,825 (49%)
Ceredigion	£10,321,191 (46%)	-	£8,351,088 (37%)	£3,766,640 (17%)
Conwy	£912,258 (5%)	£13,367,634 (67%)	£3,647,078 (18%)	£1,971,811 (10%)
Denbighshire	£9,842,841 (42%)	£5,573,533 (24%)	£684,545 (3%)	£6,023,749 (26%)
Gwynedd	£24,411,571 (52%)	-	£6,175,045 (13%)	£16,480,891 (35%)
Pembrokeshire	£16,375,504 (63%)	-	£1,869,483 (7%)	£7,613,108 (29%)
Ynys Mon	£12,139,924 (60%)	-	£1,308,281 (6%)	£6,940,021 (34%)
Objective 2 area				
Monmouthshire	£1,402,953 64%	0	0	£793,114 36%
Powys	£1,033,618 11%	0	£1,790,229 19%	£6,557,106 70%

Table 5.8: Breakdown by county of ERDF grants made through county partnerships under Objective 1 and Objective 2 of the EU Structural Funds, 2000-Dec 2005. Source: WEFO

5.21 The full extent of the difference between the rural local authorities is most clearly shown by breaking down ERDF funding in Objective 1 and 2 regions for fixed location projects by value per capita of grants awarded. As table 5.10 shows, there is considerable variation between most of the rural local authorities in the value per capita of ERDF funding for all types of area (small towns, urban / urban fringe and residual rural). Some of this absolute variation corresponds to the different levels of overall ERDF funding per capita across the local authorities, which varies from £17 in Monmouthshire to £403 in Gwynedd, reflecting eligibility for Objective 1 funding. It is therefore necessary to discount absolute differences in funding per capita for small towns and instead compare the relative distribution of funding per capita between small towns, other urban and fringe areas and residual rural areas across the rural local authorities.

5.22 From this perspective, the considerable variation between rural local authority areas in terms of the significance of small towns as sites of economic investment becomes most apparent. In Ceredigion, Denbighshire, Gwynedd, Pembrokeshire and Ynys Mon, the value per resident of ERDF funding awarded to fixed location projects is significantly higher in small towns than in other areas. In four out of these five local authorities, none of the population lives in urban or urban fringe areas. ERDF grants for fixed location projects in Monmouthshire have been awarded only to small towns; the remainder of ERDF funding has been awarded to initiatives that have no fixed location or that operate across multiple sites. In Carmarthenshire, funding per capita for fixed location projects in small towns is higher than in residual rural areas but lower than in urban and urban fringe areas, whilst in Conwy and Powys the value of funding per resident for fixed location projects is highest in residual rural areas and lowest in small towns.

	Population in small towns (% of total)	ERDF funding to small towns (% of total)	% of ERDF funding for fixed location projects awarded to small towns
Objective 1 area			
Carmarthenshire	43,700 25%	£4,561,548 (13%)	26%
Ceredigion	28,181 38%	£10,321,191 (46%)	55%
Conwy	14,459 13%	£912,258 (5%)	5%
Denbighshire	28,523 31%	£9,842,841 (42%)	57%
Gwynedd	65,853 55%	£24,411,571 (52%)	80%
Pembrokeshire	63,698 56%	£16,375,504 (63%)	90%
Ynys Mon	31,901 48%	£12,139,924 (60%)	87%
Objective 2 area			
Monmouthshire	50,773 60%	£1,402,953 64%	100%
Powys	50,745 40%	£1,033,618 11%	37%

Table 5.9: Percentage of county population living in small towns and % of ERDF funding awarded through county partnerships to small towns in Objective 1 and Objective 2 areas, 2000 – Dec 2005. (Population as at 2001 census.)
Source: WEFO and 2001 census

	Small Town	Other urban and fringe areas	Rural areas	Total inc. all county
Objective 1 area				
Carmarthenshire	£104	£139	£61	£202
Ceredigion	£366	-	£179	£299
Conwy	£63	£167	£240	£182
Denbighshire	£345	£120	£38	£238
Gwynedd	£371	-	£121	£403
Pembrokeshire	£257	-	£37	£227
Ynys Mon	£381	-	£37	£305
Objective 2 area				
Monmouthshire	£28	-	-	£17
Powys	£20	-	£26	£111

Table 5.10: Value per resident of ERDF grants awarded to fixed location projects through county partnerships under Objective 1 and Objective 2 of the EU Structural Funds, 2000 – Dec 2005. (Population as at 2001 census).

5.23 The value of ERDF funding per resident for fixed location projects also varies considerably between different small towns. Across the nine rural local authority areas, ten towns stand out as the most significant sites of economic investment in terms of value of grants per resident (table 5.11) (see also appendix L). These include two of the five largest small towns in rural Wales (Milford Haven and Bangor) as defined in chapter 2 and the largest towns of Gwynedd (Bangor), Pembrokeshire (Milford Haven) and Ynys Mon (Holyhead and Llangefni). All of the ten towns are located in rural local authorities in which the value per resident of ERDF funding awarded to fixed location projects is significantly higher in small towns than in other areas (Denbighshire, Ceredigion, Yyns Mon, Gwynedd and Pembrokeshire). These five authorities have also received the highest levels of ERDF funding considered in terms of value per resident between 2000 and 2005.

Town	Number of grants	Total value of grants	Value of grants per resident
St Asaph	2	£8,376,382	£2399.42
Bangor	5	£19,354,434	£1199.90
Cardigan	6	£4,591,128	£1092.34
Pembroke Dock	10	£7,434,480	£856.90
Holyhead	5	£9,567,864	£851.46
Llandysul	3	£902,623	£593.44
Llangefni	4	£2,442,431	£523.90
Milford Haven	5	£6,794,303	£519.20
Blaenau Ffestiniog	3	£1,019,845	£345.71
St David's	2	£616,423	£343.03

Figure 5.6: Towns receiving the highest value of ERDF approved grants per resident for fixed location projects through county partnerships under Objective 1 and Objective 2 of the EU Structural Funds, 2000 – Dec 2005.

Social Development: NLCB Community Fund

5.24 The Community Fund of the National Lottery Charities Board (later the Big Lottery Fund) has become an important source of social investment in rural areas and small towns since its launch in 1995. Grants awarded from the fund have supported the activities of local clubs and societies, the organisation of events, festivals and exhibitions, the provision of welfare and advice services to vulnerable and in-need groups, and the development and manintenance of infrastructure including community halls and transport. If small and market towns are serving as the social as well as the economic centres of rural Wales, as the locus for associational activities and for access to support services, then it might be expected that small towns would receive a disproptionate share of support through the Community Fund.

5.25 Between 1995 and 2005, the nine core counties of rural Wales received a total of 2,592 awards from the Community Fund, collectively worth over £71.3 million. Of these, at least 700 awards were made to projects and organisations in small and market towns (for about 200 awards there is insufficient information in the Community Fund database to identity the location), with a total of value of £17.5 million. Additionally, small and market towns have benefitted from some of the £27.5 million awarded to initiatives that have no fixed location, or which operate at multiple sites within a district, many of which will be administered through small and market towns.

5.26 There are however variations in the proportion of both awards and funds made to small and market towns between the different local authority areas (tables 5.7 and 5.8), usually reflecting the significance of other urban and fringe areas within the county. In Carmarthenshire, Ceredigion, Conwy, Pembrokeshire and Powys more actual awards were made to applications from rural communities than from small towns, but in Pembrokeshire and Powys more total funds were awarded to schemes in small towns.

5.27 Overall, the number of grants awarded to small and market towns in rural Wales is roughly proportionate to their population significance within local authority areas. However, as the grants awarded to projects in small towns are often significantly larger than those awarded to projects with more rural locations, small towns have tended to receive the majority share of actual funds awarded by county (table 5.9). In general the value of Community Funds received per head of population is greater in small towns than for either rural communities or other urban and fringe areas, significantly so in Powys and Ceredigion where on average over £90 has been received from the Community Fund for every small town resident.

	Small Town	Other urban and fringe areas	Rural areas	No fixed location / County-wide	Not specified / known
Carmarthenshire	87 (15%)	181 (32%)	223 (40%)	72 (13%)	29
Ceredigion	65 (35%)	- (0%)	82 (45%)	37 (20%)	10
Conwy	15 (10%)	44 (29%)	44 (29%)	49 (32%)	7
Denbighshire	49 (24%)	54 (26%)	44 (21%)	60 (29%)	16
Gwynedd	102 (39%)	- (0%)	97 (37%)	66 (25%)	18
Monmouthshire	82 (44%)	3 (2%)	57 (31%)	44 (24%)	9
Pembrokeshire	98 (35%)	-	134 (48%)	50 (17%)	19
Powys	167 (37%)	14 (3%)	193 (43%)	72 (17%)	74
Ynys Mon	43 (38%)	-	38 (33%)	33 (29%)	11
Total – rural Wales	708 (30%)	296 (12%)	912 (38%)	483 (20%)	193

Table 5.7: Breakdown by county of Community Fund grants awarded (number), 1995-2005.

	Small Town	Other urban and fringe areas	Rural areas	No fixed location / County-wide	Not specified / known
Carmarthenshire	£1,273,886 10%	£4,393,350 36%	£2,527,468 21%	£4,103,861 33%	£284,420
Ceredigion	£2,484,057 36%	-	£2,656,853 39%	£1,685,544 25%	£241,906
Conwy	£178,668 4%	£1,939,876 38%	£384,865 8%	£2,535,644 50%	£470,867
Denbighshire	£1,120,830 13%	£1,749,763 21%	£485,607 6%	£5,051,043 60%	£977,387
Gwynedd	£3,149,921 35%	-	£2,165,563 24%	£3,789,826 42%	£914,845
Monmouthshire	£1,069,105 29%	£14,876 <1%	£312,178 9%	£2,257,540 62%	£44,279
Pembrokeshire	£2,096,750 42%	-	£1,023,268 21%	£1,853,855 37%	£302,447
Powys	£5,291,325 43%	£232,464 2%	£3,002,220 24%	£3,911,528 31%	£1,347,357
Ynys Mon	£828,930 23%		£444,674 12%	£2,342,451 65%	£399,729
Total – rural Wales	£17,493,472 26%	£8,330,329 13%	£13,002,696 20%	£27,531,292 41%	£4,983,237

Table 5.8: Breakdown by county of Community Fund grants awarded (value), 1995-2005.

	Population in small towns (% of total)	Community Fund awards to small towns	Value of Community Fund awards to small towns
Carmarthenshire	43,700 25%	87 18%	£1,273,886 16%
Ceredigion	28,181 38%	65 44%	£2,484,057 48%
Conwy	14,459 13%	15 15%	£178,668 7%
Denbighshire	28,523 31%	49 33%	£1,120,830 33%
Gwynedd	65,853 55%	102 51%	£3,149,921 59%
Monmouthshire	50,773 60%	82 58%	£1,069,105 77%
Pembrokeshire	63,698 56%	98 42%	£2,096,750 67%
Powys	50,745 40%	167 45%	£5,291,325 62%
Ynys Mon	31,901 48%	43 54%	£828,930 65%

Table 5.9: Percentage of county population living in small towns and number and value of Community Fund awards received by projects based in small towns, 1995 – 2005, as % of all awards with fixed location. (Population as at 2001 census.)

Source: National Lottery Charities Board and 2001 census

5.28 There are also considerable variations in the number of grants obtained and volume of funding received between individual towns. The value of Community Fund awards per capita ranges from under £10 for each resident in several towns to over £300 per resident in Machynlleth (table 5.10). There appear to be a number of factors influencing this distribution. Firstly, county towns and other administrative centres have tended to attract above average levels of funding owing to the presence in these towns of facilities that serve the wider district. Secondly, some smaller towns have received a high level of funding per head of population through one or two large grants for infrastructural projects, for instance the innovation of community halls. Thirdly, there is some evidence that the distribution of funding is also influenced by the availability of other funding sources and by the effect of community capacity building initiatives in improving a community's ability to successfully apply for grants.

Town	Number of grants	Total value of grants	Value of grants per resident
Machynlleth	11	£652,500	£303.91
Penygroes	6	£499,856	£282.40
Llandysul	5	£303,560	£199.58
Llanfyllin	10	£266,525	£189.43
Aberaeron	4	£277,344	£182.46
Beaumauris	2	£330,988	£162.25
Rhayader	8	£295,315	£142.32
Newtown	33	£1,445,375	£134.09
Trimsaran	4	£327,008	£129.10
Cardigan	19	£540,488	£128.60

Table 5.10: Towns receiving the highest value per resident of Community Fund grants awarded, 1995-2005.

NB: Population as at 2001 census. Population of town calculated at ward level, as defined in appendix A.

5.29 This last factor is also apparent when the largest recipients of grants from the Community Fund are compared with the largest recipients of ERDF funding (table 5.11). The largest recipients in either list are not necessarily the largest towns in rural Wales, although three of the towns that are in the top ten recipients in both list have populations of over 15,000 (Aberystwyth, Bangor and Carmarthen). Of the smaller towns, Cardigan and Caernarfon also appear in the top ten for both types of funding. Otherwise, the largest recipients of EDRF funds include several towns with declining industrial bases, reflecting the priorities of the Objective 1 programme in supporting economic regeneration and targeting social exclusion. The largest recipients of Community Fund awards interestingly include several towns in Powys. This possibly is a reflection of Powys being located outside the Objective 1 area and therefore the potential to access European funding, combined with the benefits of capacity building through long-term community development work in many Powys towns.

	ERDF Awards, 2000-2005		Community Fund Awards, 1995-2005	
1	Bangor	£19,354,434	Newtown	£1,445,375
2	Holyhead	£9,567,864	Aberystwyth	£1,270,297
3	St Asaph	£8,376,382	Bangor	£1,070,257
4	Pembroke Dock	£7,434,480	Denbigh	£969,539
5	Milford Haven	£6,794,303	Brecon	£815,964
6	Cardigan	£4,591,128	Carmarthen	£698,756
7	Aberystwyth	£4,443,004	Machynlleth	£652,500
8	Llangefni	£2,442,431	Llandrindod Wells	£633,811
9	Carmarthen	£2,287,109	Cardigan	£540,488
10	Caernarfon	£1,834,447	Caernarfon	£510,910

Table 5.11: Comparison of ten largest recipients of ERDF awards, 2000-2005, and ten largest recipients of Community Fund awards, 1995-2005, of small towns in rural Wales.

Conclusion

5.30 There is evidence that small and market towns are the centres for social and economic development in rural Wales, at least to an extent. Small and market towns have received a significantly greater proportion of both European Regional Development Funds under Objective 1 and Objective 2, and awards from the Community Fund of the National Lottery Charities Board, than their population share would normally warrant. Much of this investment has gone to projects and initiatives that have a much broader spatial reach than the town itself, including the development of physical infrastructure and organizations which whilst based in towns also serve the neighbouring rural population. Evidence for private sector investment is more limited and data that is available points towards a more patchy geographical pattern. There are a number of towns that have benefitted from significant private sector investment in recent years with significant job creation. Yet, there is not necessarily anything intrinsically special about small towns that attract this investment, and some of the most significant investments have been into hinterland sites, as the case of St Asaph, discussed in the next chapter, illustrates.

CHAPTER 6: CASE STUDIES

Introduction

6.1 The previous chapters have analysed the characteristics, dynamics and diversity of small and market towns in rural Wales by particular themes. In this chapter we cross-cut this analysis with an integrative examination of five case study towns: Caldicot, Llandeilo, Llandrindod Wells, Llanidloes and St Asaph. These case studies have been selected on the basis of the analysis outlined in the previous chapters. They represent towns which exhibit different characteristics and different dynamics, and also represent different geographical contexts within rural Wales.

6.2 The case study research involved three elements of data collection and analysis. Firstly, further statistical and documentary analysis has been undertaken on both the data discussed in the previous chapters and on other published data and documents specific to the case studies that have been collected. Secondly, a telephone survey was conducted of a sample of employers in each case study to collect data on the spatial reach of their employment and their trading relations. Twenty employers were contacted in each case study, with equivalent enterprises contacted in each town. The samples, however, were indicative rather than representative and the data is similarly illustrative and is not sufficiently robust to produce summative statistics for the towns. For reasons of confidentiality, the full dataset from the survey is not presented in this report. Finally, telephone interviews were conducted with key individuals in the case study towns to explore issues concerning the social and economic dynamics of the town and its relationship with its hinterland and with neighbouring towns.

Llandrindod Wells

6.3 The relationship of Llandrindod Wells with its rural hinterland in mid Wales has long been defined by its historic role as the county town and market for the old county of Radnorshire. Residents of communities as distant as Clyro in the south-east of the former county traditionally traveled to Llandrindod Wells as their market town in preference to nearer towns such as Hay on Wye due to the strength of county ties. More recently these more distant connections have been diminished by competition from larger and more accessible centres, including Brecon, Newtown and Hereford, but since 1974 Llandrindod Wells has also obtained a broader significance as the administrative centre for Powys County Council.

6.4 The significance of the public administration sector in Llandrindod Wells is reflected in the employment structure of the town, in which managerial and professional occupations are over-represented compared with Powys as a whole (table 6.1). This is particularly the case with lower managerial and professional occupations, which constitute over a quarter of all jobs in the town. In addition to the offices of Powys County Council, which employs around 250 people in Llandrindod Wells, the town also hosts offices of the Welsh Assembly Government, as well as smaller offices for a number of other public sector agencies, including the Dyfed Powys Probation Service, and related organisations, including the Mid Wales Housing Association. The presence of these institutions in the town is in part a function of its central location in Wales and they are involved not so much in serving the immediate hinterland as in operating from Llandrindod Wells as a sub-regional centre. Other significant public sector employers in the town include the hospital, schools and Coleg Powys, which has around 50 employees in the town. In total, around 40 out of the 270 VAT-registered local units in the town are in public administration, with a further 10 in health and around 5 in education.

	Llandrindod Wells		Powys	
Large employers & higher managerial	114	3.0%	1328	2.5%
Higher professional	223	5.8%	2505	4.7%
Lower managerial and professional	1103	28.6%	11268	21.1%
Intermediate	589	15.3%	4948	9.3%
Small employers & own account workers	316	8.2%	12545	23.5%
Lower supervisory & technical occupations	279	7.2%	5145	9.6%
Semi-routine occupations	637	16.5%	8142	15.3%
Routine occupations	466	12.1%	6097	11.4%
Not classified	125	3.2%	1388	2.6%

Table 6.1: Occupation of personnel employed in Llandrindod Wells compared with those employed in Powys as a whole.
Source: Office of National Statistics (Census 2001)

6.5 Alongside its administrative function, Llandrindod Wells also has a heritage as a tourism destination that dates back to the arrival of the railway and the exploitation of the spa waters in the 1860s. As such the town has long enjoyed a spatial reach in terms of trade that has extended beyond the immediate rural area to engage with national and international markets. Whilst the town has continued to attract tourists, building on its spa-town heritage and rural setting through events such as the annual Victorian Festival, the hotel and hospitality sector has also been sustained by a buoyant conference trade, again benefiting from Llandrindod's central position within Wales. The Metropole Hotel employs around 85 staff in the town, whilst the smaller Commodore Hotel employs around 15 staff. Both attract up to 10% of their custom from overseas visitors and around 10% from local patrons, with balance from customers from elsewhere in the UK. Both advertise both regionally and nationally. A further recent development of the tourism sector has been the establishment of the National Cycle Museum in the town centre.

6.6 Manufacturing enterprises comprise only around 15 of the 270 VAT-registered local units in Llandrindod Wells. The largest industrial employer, Setten and Durward employs around 230 people in the town, 95% of whom live locally. The company, however, undertakes relatively little trade locally. Over three-quarters of its customers and 90% of its suppliers are located outside the local area in Britain, whilst 21% of its customers and 8% of suppliers are located outside Britain. The parent company, Setten Holdings Ltd., which is also registered in Llandrindod Wells, is calculated to be the 263rd largest company in Wales on the basis of its turnover, and was reported to have a total of 304 employees (Western Mail, 2005). Other industrial and related enterprises in the town tend to be smaller-scale and are predominantly located on the Parc Menter Ddole and newly developed Heart of Wales Business Park.

6.7 In total, Llandrindod Wells provides over 3,800 jobs, equivalent to 1.86 times its working population and accounting for three-quarters of all jobs within a ten mile radius and four out of ten jobs in its travel-to-work area. As such, Llandrindod Wells depends on a large in-flow of commuters. Over three-quarters of working residents travel less than 2 kilometres to their place of employment, suggesting that most work within the town – an extremely high rate of local-based employment with the consequence that commuting out of Llandrindod to work elsewhere is limited. Nearly five times as many people commute into Llandrindod to work as commute out of the town, 2250 to 470. Around half of the workforce is drawn from the town or from within 5 kilometres, but Llandrindod Wells also attracts commuters from a very extensive area of mid Wales and the English borderlands (figure 6.1). One in six workers commute in from between 10 and 20 kilometres outside the town, a zone that includes Builth Wells, Rhayader, Llanbister and New Radnor; whilst 6% travel between 40 and 50 kilometres to work, a distance that includes Hereford, Leomister, Ludlow, Welshpool and Aberystwyth within its reach. The survey of local employers suggest that employees in public sector workplaces are more likely to be drawn from a wider area, with around a quarter of employees of Powys County Council in Llandrindod living more than 10 kilometres outside the toward compared with around 5% of employees of Setten and Durward.

6.8 In contrast, fewer than a quarter of the residents of Llandrindod Wells commute out of the town to work, and nearly half of those who do work within 20 kilometres of the town. Overall, one in ten of residents work in the town's hinterland of up to 20 kilometres, although there are relatively few significant employers in this area – the most notable being the BSW Timber sawmill, established in 1981 and employing around 100 people. In 2005, BSW Timber was given planning permission to extend facilities at the site as part of a £15 million investment that would create around 20 new jobs. Fewer than one in ten Llandrindod Wells residents commute a sufficient distance to work in any of the closest larger towns – Newtown, Brecon or Hereford.

6.9 The co-ordinator of the Llandrindod Wells Town Spa Trust, however, observed that "we have people coming to work here from all over the place, but we also have people leaving here to work all over the place." The town has a high turnover of younger residents – Llandrindod East/West ward had a in-migration rate of 386 per 1000 residents in the age range 15-24 in the year before the 2001 census, and an identical out-migration rate for the same age range, amongst the highest rates outside university towns. The availability of relatively affordable housing, including rented properties in former hotels and boarding houses, helps to attract younger migrants. However, Llandrindod

Wells despite its local significance is still a limited labour market, and young people are often obliged to move on to find appropriate, long-term employment.

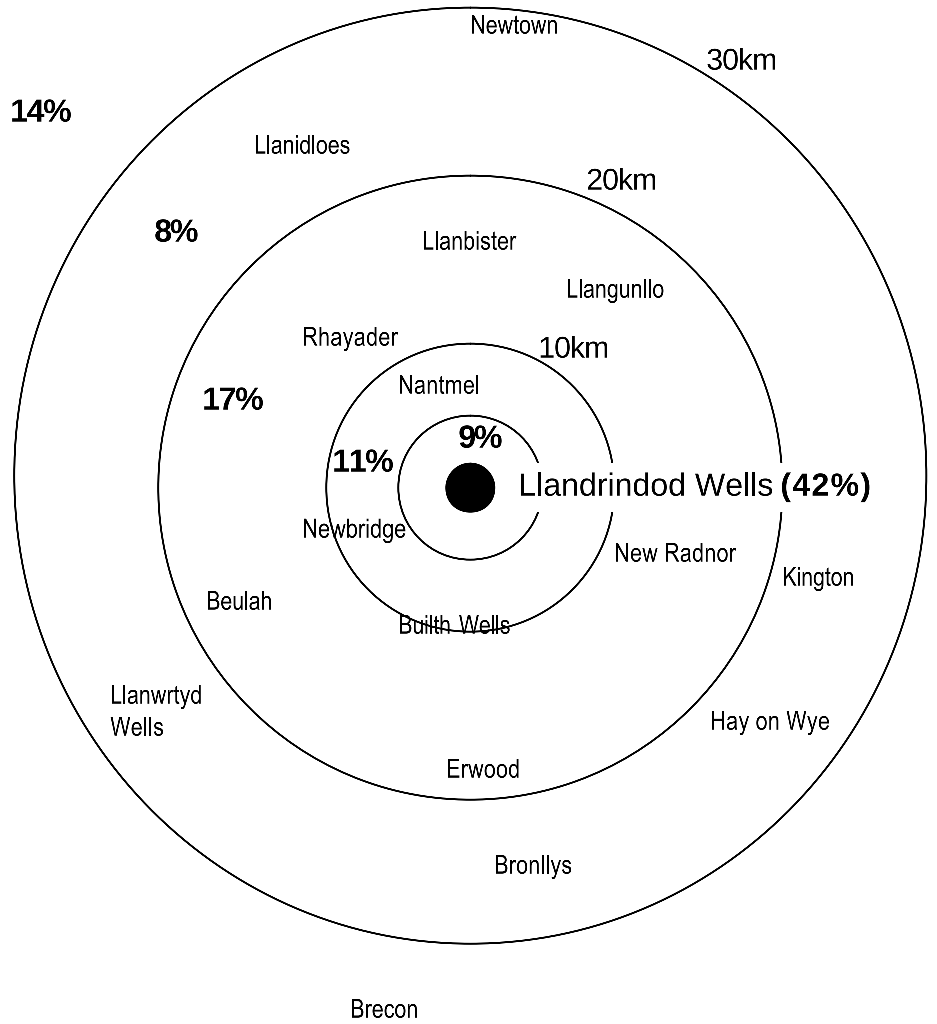

Figure 6.1: Source of workers employed in Llandrindod Wells by distance travelled to work, 2001.

6.10 The availability of relatively affordable rented accommodation in Llandrindod Wells has also attracted 'welfare migrants', households dependent on state benefits who have moved into the town because of its quality of life and cost of living. This current of welfare migration has contributed to maintenance of a fairly stable number of Jobseeker's Allowance claimants in Llandrindod at a time when the number of claimants generally has fallen substantially.

6.11 Overall, the trend of population change in Llandrindod is of slowing growth. An increase in population of 13.1% between 1981 and 1991 was followed by a much smaller increase of 2.6% between 1991 and 2001. Recent new house building has also been limited and the town is largely contained within its community boundaries. In contrast, population growth in all the neighbouring rural wards exceeded 5% between 1991 and 2001, with increases of over 15%

in the rural area to the east of the town. However, the population of the Radnor shire area remains relatively small, with a low population density and this absence of a significant catchment population limits the opportunities for economic growth in Llandrindod Wells.

6.12 The service function of Llandrindod, for example, remains heavily skewed towards public sector activities. In addition to the county council offices, the town has a secondary school, day centre, public library, police station, Further Education college, hospital and magistrates' court, all serving a fairly extensive rural district around the town. A theatre, drama centre, dance centre, youth centre, community sports centre and various sport facilities may also be anticipated to serve neighbouring local communities as well as the town. However, it does not have higher-order functions normally associated with the chief town of a county, including a county court and a police divisional headquarters. Neither does the hospital possess an accident and emergency unit, the nearest such units being in Aberystwyth and Hereford, which also are the nearest locations for many hospital in-patient services.

6.13 The commercials services in the towns, moreover, tend to be smaller and lower-order businesses. The town had until recently two small supermarkets, Somerfield and Kwiksave. The Kwiksave store closed in spring 2006, but is due to re-open as an Aldi supermarket. The nearest of the major supermarket chains, however, is Morrisons in Newtown, 19 kilometres away. This supermarket, and its sister supermarket in Brecon, do have an effect in drawing some trade away from Llandrindod Wells. The town has not so far attracted an out-of-town or purpose-built retail centre, and the representation of major national chains in the town is limited. Our survey of local businesses suggested that most are small workplaces, with fewer than ten employees, and that many are independent local companies. At the same time, the firms varied significantly in the level of their local dependency, with several reporting that 40% or more of the customers are outside the local area. Equally, almost all of the businesses surveyed sourced only a small minority of their supplies in the local area.

6.14 The Deposit Draft Unitary Development Plan for Powys identifies 12.47 hectares across five sites in the town for future housing development, and four sites for employment-related development, including the area currently under development by the Welsh Development Agency as the Heart of Wales Business Park. New economic investment in Llandrindod Wells does however appear to be of a lower volume that in many of the other key centres in rural Wales. With the exception of a share of a grant to the Mid Wales Manufacturing Industries Network, which also covered enterprises in Newtown, Machynlleth and Welshpool, the town has not directly received investment from the European Regional Development Funds under Objective 2 for fixed location projects. There has been more success, however, in accessing Community Fund monies, with seventeen grants obtained since 1995 totaling £633,811. Significantly, several of the awards were for projects that whilst based in Llandrindod have served a broader population. These include Cymryd Rhan, which was awarded £370,304 in 2000 to create work experience opportunities for people with learning disabilities, and £81,640 awarded in two grants to Radnorshire Women's Aid.

6.15 The success in obtaining Lottery funding reflects a broader record of local action and partnership working in the town. The historic Rock Park in the town was refurbished as a result of partnership working, and partnership working between the town council, county council and business forum has enabled the employment of a regeneration officer for the town. More recently, the partnership approach been extended laterally to work with neighbouring communities through the Ithon Valley Community Forum.

Llanidloes

6.16 Llanidloes is located 25 kilometres north-north-east of Llandrindod Wells and for some purposes falls within the latter's sphere of influence, but it also has a long history as an independent market and industrial town. In particular, Llanidloes has historically served as the local centre for the dispersed rural communities and farmsteads of the Clywedog, Trannon and upper Severn valleys, several of which form the community of Llanidloes Without. To the north and east, however, Llanidloes competes with the larger centres of Newtown and Llandrindod Wells as the source of employment and services for communities such as Llandinam and Pant-y-Dwr.

6.17 The communities of the Clywedog, Trannon and upper Severn valley are however small and sparsely populated. The three community council areas that comprise this rural hinterland, Llanidloes Without, Llangurig and Trefeglwys have a combined population of just over 2,000 residents, whilst Llandinam has a population of just under 1,000. The hinterland population for Llanidloes is therefore limited, restricting the opportunities for growth in the town. The population of Llanidloes remained stable during the 1980s at around 2,500 and increased by 9.2% between 1991 and 2001 to just over 2,800.

6.18 The industrial heritage of Llanidloes extends back to the development of a vibrant woven textiles industry in the sixteenth century with the industrial base later diversifying into tanning and metal-working before declining in the late twentieth century. The town's major employer, the KTH car component plant closed in 2003 with the loss of 240 jobs, having shed 200 jobs in 2001 when an earlier decision to close the factory had been reversed by local campaigning. The closure of the factory was felt particularly severely as it was regarded as a source of well-paid employment in a generally low-pay economy, with workers earning up to £850 a week. The plant closure, however, has not created a significant unemployment problem in Llanidloes but has rather meant that many residents are travelling further to work. As the town clerk observed,

> "it means that people are having to commute further and further. Some go all the way to places like Leominster which is an hour and twenty minutes away. There is little unemployment in the

town, so it seems that people do want to work and that they are willing to travel to find work."

Llanidloes Town Clerk (interview)

6.19 Figures from the 2001 census show that there was already an established pattern of commuting from Llanidloes before the KTH closure, but that this was not as pronounced as in many other small towns. Indeed, at that time there were almost exactly the same number of people employed at workplaces in the town as working people living in the town (1260 compared to 1272), and nearly six in ten working residents were employed in the town. Of the 500 or so residents who travel outside the town to work, the largest proportion commute to Newtown, with the Laura Ashley factory in particular identified as a major employer (figure 6.2). Only 4% travel to work in the immediate hinterland of the town, including the Hamer International food processing plant at Dolwen, which employs around 100 people.

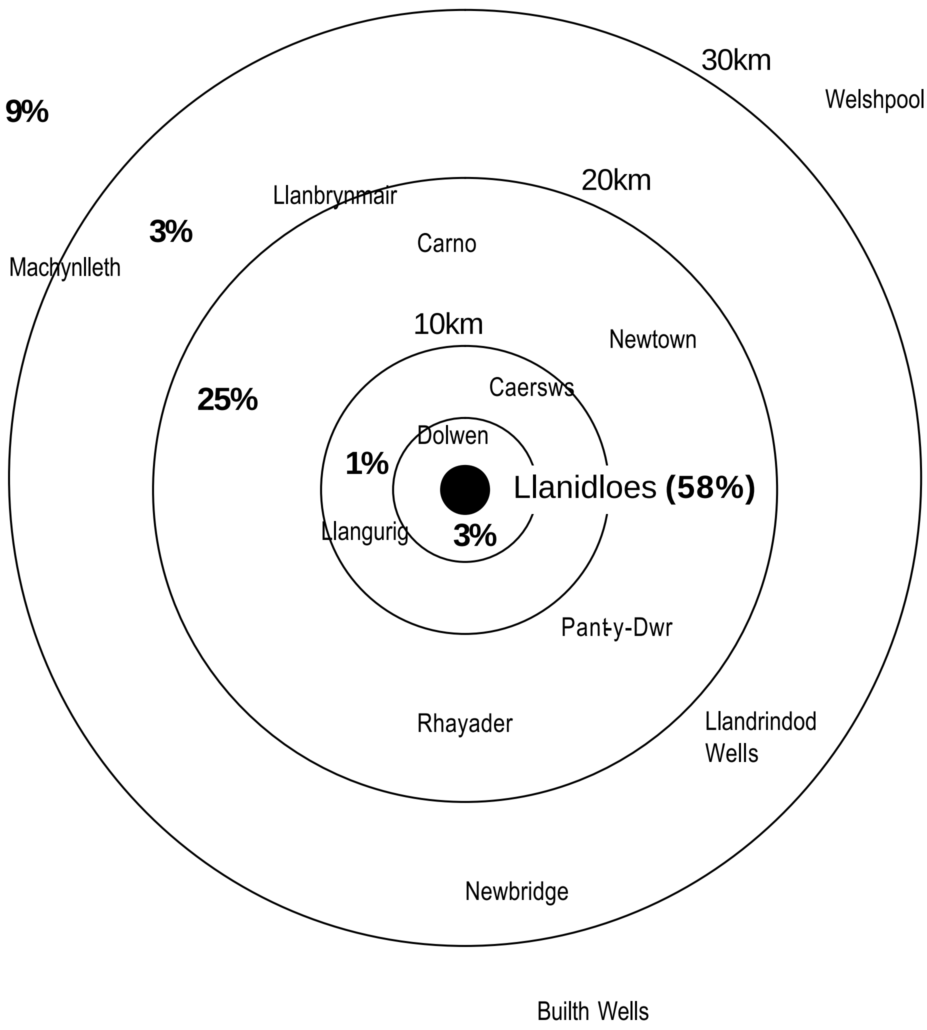

Figure 6.2: Distance traveled to work by working residents of Llanidloes, 2001

6.20 The commuting flows out of Llanidloes are mirrored by commuting flows into the town, except that the distances travelled tend to be shorted. Around 59% of jobs in the town are filled by people living in the town, but 15% of the town's workforce travels in from up to 10 kilometres in the hinterland, and a further 16% commute between 10 and 20 kilometres from settlements including Newtown. Employers in Llandiloes are generally small enterprises: 90% of VAT registered local units in Llanidloes and its hinterland have fewer than five employees and only 3% have more than ten employees. There are nonetheless a number of small industrial and craft-based units based on sites including the Station Workshops and the Parc Hafren Business Estate under development on the edge. Other employers including offices of the Woodland Trust and the Forest Stewardship Council, hotels and retailers, and public sector workplaces including the primary and secondary schools and the hospital (which employs 70 people).

6.21 As a service centre, Llanidloes maintains a greater range of public sector facilities than its size and proximity to Newtown would initially suggest, including a community hospital (also serving Caersws and Rhayader), a primary school (whose catchment area extends up to 15 kilometres) and a secondary school, a library, a police station, a GP surgery, a day centre and a community centre. The town also supports a range of local shops, including a Somerfield supermarket, to some extend depending on convenience shopping by residents of neighbouring rural communities in which facililities are very limited. However, there is competition from the greater range of shopping facilities available in Newtown, Aberystwyth and Shrewsbury.

6.22 As such, the commerical base of Llanidloes is also dependent on external trade, including tourists and the development of niche markets. Llanidloes was the location of the first Laura Ashley shop and the outlet still draws custom into the town. The Hafren Furnishers furniture stores advertise on a regional scale and attract customers from across mid Wales and there are also a number of small craft galleries, antique shops and similar specialist retailers that draw on the tourist trade. The development of various outdoor pursuits centres in the hinterland has also helped to develop a niche market that brings trade into the town.

6.23 The service infrastructure of Llanidloes however remains vulnerable and a number of local campaigns have been mounted in recent years to protect specific facilities from closure. As well as the initially successful campaign that deferred the closure of the KTH plant by two years, local activists have also successfully campaigned against closure plans for the hospital and for the Laura Ashley shop and are currently campaigning for 24-hour ambulance cover. The capacity for local action is also reflected in the strength of community-led regeneration activity in the town. Llanidloes was a beneficiary of the DBRW Market Town Initiative between 1996 and 2000, and a local regeneration company, LLANI, is currently funded by the Welsh Development Agency Tool-kit. Over £300,000 has been received from the Community Fund for projects based in the town since 1995, including £107,628 for the Llanidloes Resource Centre which acts as information point and facility for a wide range of local community activities, including a credit union and a community transport scheme. Many of the initiatives have a remit that explicitly includes the rural hinterland, although one individual involved in regeneration activities noted that it was harder to reach and engage people outside the town.

6.24 Following the closure of the KTH factory in 2003, Llanidloes Town Council set up the Llanidloes Taskforce, including representatives from a range of local organizations and from regional and national agencies including the Welsh Development Agency. The Taskforce oversaw the production of Regeneration Plan that outlines a vision for the town:

> "To transform Llanidloes into a rural focus for innovative high-value enterprise and employment in the heart of Mid Wales, a broadband-enabled town which celebrates and sustains its heritage, a thriving community which encourages young people to stay and attracts entrepreneurs to enjoy an exceptional mix of economic opportunity and quality of life."
>
> (Llanidloes Regeneration Plan, 2003)

6.25 The Regeneration Plan consists of five action programmes: (1) Providing New Business Opportunities; (2) Creating a Broadband Economy; (3) Expanding the Local Tourist Offer; (4) Supporting Business and Skills Development; and (5) Regenerating the Community. The plan was approved by the Minister for Economic Development and is supported by the Welsh Assembly Government.

6.26 Specific projects undertaken as part of the Regeneration Plan include the construction of a new access road, funded by £2.4 million from the Welsh Assembly Government, which will connect with a new high technology business park on the site of the KTH plant, aimed at providing energy-efficient units for businesses in a range of sectors including agri-food and ICT. Other actions include support for marketing Llanidloes as a tourism destination, supported by a grant of £125,000 from the Wales European Funding Office to LLANI Ltd., and the accelerated conversion of the telephone exchange to facilitate broadband connections in early 2004.

Caldicot

6.27 Caldicot is the eighth largest of the 'small towns' in rural Wales identified by this report, but its transformation from a village to a town is a relatively recent development. The establishment of a wireworks in 1862 (later converted into a tinplate factory) and the opening of the Severn Junction Railway Yards in 1886 stimulated the development of the settlement in the late nineteenth century, but it was not until after the second world war that Caldicot entered a period of rapid growth as a dormitory settlement serving the new Llanwern steel works ten kilometres west of the town. The population of Caldicot doubled between 1961 and 1971 and increased by a further 37% to 1981 (table 6.2). Since 1981, the population of the town council area has decreased slightly, although the village of Portskewett - which has in effect become conjoined to the town and which is included in the town area for the purposes of this report - has continued to grow in population. In 2001, the built-up town area of Caldicot had a population of 11,594, of whom 9,705 lived in the community of Caldicot proper.

Year	Population	Change over decade
1851	661	-
1901	1,196	-
1951	1,770	-
1961	3,351	+89.3%
1971	7,309	+118.1%
1981	10,044	+37.4%
1991	9,785	-2.6%
2001	9,705	-0.8%

Table 6.2: Population of Caldicot community, 1851-2001

6.28 The association between Caldicot and the Llanwern steelworks meant that modern Caldicot has always been a town from which people have commuted to work elsewhere as opposed to a town that has drawn in workers from surrounding communities. This has continued to be true after the closure of the Llanwern plant in 2001, with residents now commuting to a wider range of destinations. The town's location on the mainline Cardiff to Bristol railway line and its proximity to the M4 and M48 makes it accessible for commuting to Cardiff, Newport, Chepstow and Bristol and this trend has been reinforced by differential property prices. A local newspaper article in January 2006, for example, reported that increasing property prices in Chepstow were encouraging prospective purchasers to buy in Caldicot and commute. The average price of semi-detached properties sold in Caldicot in the last quarter of 2005 was £150,142 compared with £165,361 in Chepstow.

6.29 At the time of the 2001 census, fewer than four in ten of the working population in Caldicot worked in the town and over 3,300 residents commuted out of the town to work. Just under a tenth of working residents travelled between 5km and 10km to work, a distance which includes Chepstow and Magor; and almost a quarter travelled between 10km and 20km, a distance that includes Newport, Bristol and, at the time of the census, the Llanwern steel works (figure 6.3).

6.30 The census reported that almost twice as many people commuted out of Caldicot to work as commuted in to the town. The 3,700 jobs in Caldicot would be sufficent to employ nearly three-quarters of the town's working population, but only just over half of people working in Caldicot live in the town. A further fifth commute in from up to 10 kilometres, including Chepstow and the communities of Caerwent, Rogiet, Magor and Undy. Over a quarter of the town's workforce travels more than 10 kilometres to work (figure 6.4). As such, whilst the employment profile of Caldicot is dominated by the net outflow of commuters, it is perhaps more accurate to position the town within a complex multi-directional commuting field that also encompasses Newport, Chepstow and even Bristol than to characterise it purely as a dormintory town.

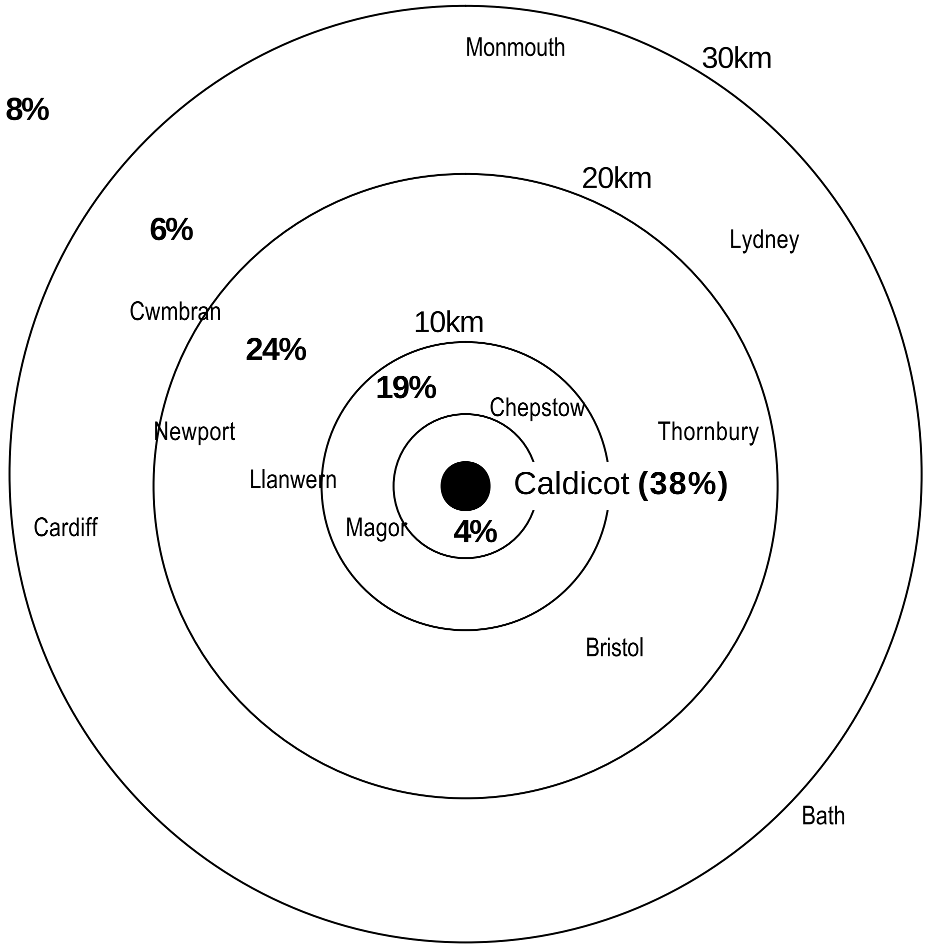

Figure 6.3: Distance to work travelled by working resident of Caldicot, 2001.

6.31 Major employers in Caldicot include Mitel Networks Ltd, the 58th largest company in Wales which employs around 600 people; the St Regus Paper group which employs 140 personnel at the Sudbrook Paper Mill just outside the town; and Corus Distribution which employs 65 staff at its site on the Severn Bridge Industrial Estate. All three companies trade in national and international markets rather than locally and their presence in Caldicot reflects more accessibility to transport networks and the availability of skilled labour than the status of the town. More broadly, the large Severn Bridge Industrial Estate contains over twenty industrial, distribution and retail units, although it is not currently fully occupied. Indeed, whilst relatively recent developments such as the Mitel plant indicate the potential for Caldicot with its desirable location to attract investment, much new development has in fact occurred outside of the town on sites that are closer to the motorway junctions.

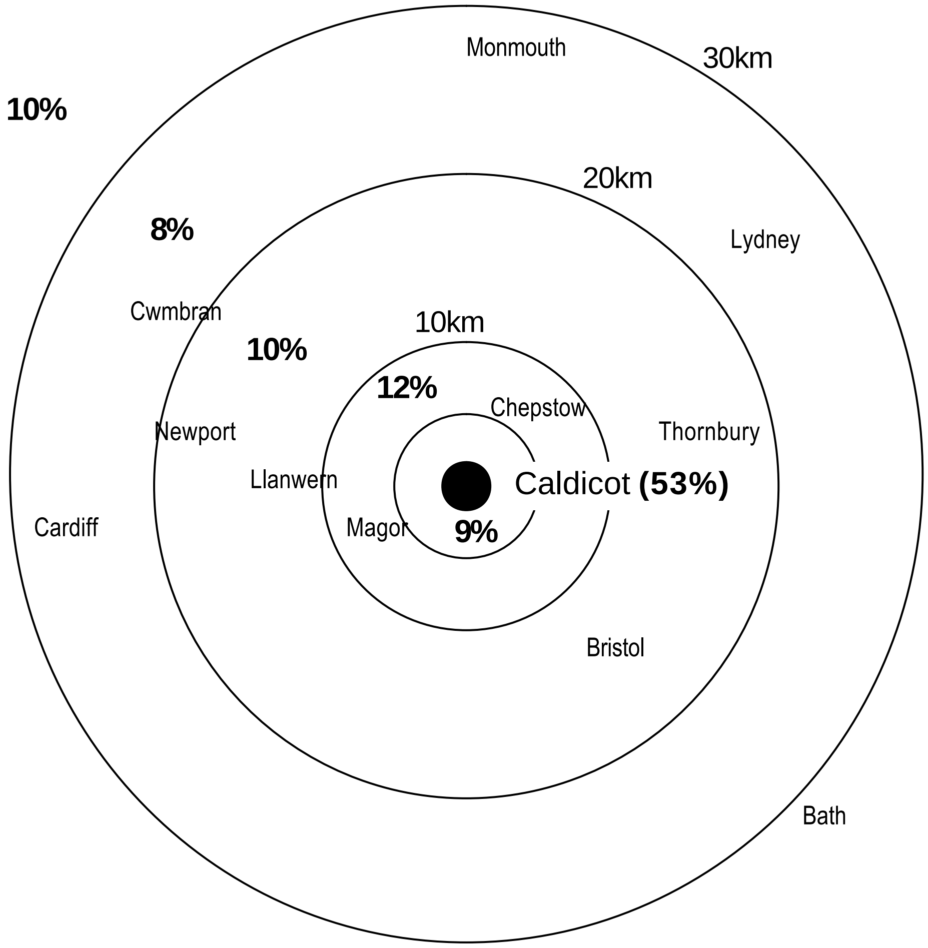

Figure 6.4: Source of workers employed in Caldicot by distance travelled to work, 2001.

6.31 Caldicot does not have the same historical role as a market serving a rural district as most other small towns in rural Wales and the range of public and commercial services that it hosts is more limited than in other towns of equivalent size. The town has a range of middle order public services, including a secondary school, a police station, a library, a job centre and a local office of Monmouthshire County Council, but with similar facilities in Chepstow and higher-order facilities in Newport, the geographical area served by these functions is restricted. The area covered by the Caldicot police station, for example, extends less than 10km outside the town at its furthest point, but includes the communities of Rogiet, Magor, Undy, Llanvaches, Llanvair Discoed, Caerwent and Portskewett.

6.32 The retail reach of Caldicot is even more limited. The town centre includes a small Somerfield supermarket and a pedestrianised precinct comprising mainly low-order stores. A survey in December 2005 found that the town centre was dominated by convenience goods and service outlets, with only 27% of the outlets selling comparison goods – little more than half the UK town centre average (RPS Planning, 2005). The retail outlets in Caldicot therefore tend to serve the convenience needs of the town's population and do not attract in customers from outside the town. As two of our interviewees observed:

> "There isn't much to bring people into Caldicot. There aren't many shops in the high street."
>
> "People stopped coming six or seven years ago. There is nothing to attract them here, to be honest. Money is now being spent elsewhere."

6.33 The shops that do remain in Caldicot are increasingly facing competition from out-of-town retail developments at Chepstow and Newport and the regional shopping centre at Cribbs Causeway across the Severn Bridge. The recent opening of a Homebase store at a retail park in Chepstow, for example, was identified as posing a threat to Washbournes DIY and household store, one of the few larger retailers in Caldicot. Analysis by RPS Planning (2005) suggests that around 42% of expenditure on convenience goods by Caldicot residents is spent in the town, but that around a quarter is spent in both Chepstow and Newport. Only 9% of expenditure on non-bulky comparison goods, however, is in Caldicot, whilst 42% is in Newport and 20% at Cribbs Causeway. The analysis also shows that residents in the hinterland areas of Portskewett and Magor and Undy are significantly less likely again to purchase both convenience and comparison goods in Caldicot and are more likely to do both in Newport.

6.34 The enhancement of Caldicot's retail infrastructure has been identified by the local regeneration partnership as the priority area for investment in the town. Plans have been advanced for a new supermarket development at Woodstock Avenue adjacent to the pedestrianised precinct, which it is hoped will be completed by March 2008. A feasibility study for the project suggested that the supermarket could draw on a catchment population of 28,000, attracting trade away from Chepstow, Newport and Cwmbran (RPS Planning, 2005). The intention, however, is that the supermarket would act as a magnet for other national chain stores assisting in the redevelopment of the town centre. The regeneration group is also exploring other initiatives for attracting trade into the town, including a shopmobility scheme and a local produce market.

6.35 The activities of the Severnside Regeneration Group are in themselves a significant development in the town, countering a perception that Caldicot had been neglected in favour of strategic investment in Chepstow, Monmouth and Abergavenny. Notably, the group's remit extends outside the town to hinterland communities include Portskewett and Caerwent and seeks to plan for the 'Severnside' area as an integrated unit.

St Asaph

6.36 The cathedral city of St Asaph has a long history as an ecclesiastical centre for north Wales, but its role as a local service sector is constrained by its proximity to the larger coastal towns of Rhyl and Prestatyn and the county town of Denbigh. The town has a range of middle-order public services including a secondary school, a police station, and two GP surgeries, but its provision of commercial and retail services is more limited. The Wales Rural Observatory services survey in 2004 recorded three food shops, eleven non-food shops and three general stores in the town, but significantly no main post office and no full-time banks – although two banks do operate part-time and there is a full-time building society. These facilities serve a convenience function for residents and workers in the town, but most of the retail needs of the community are served by the Sainsbury's supermarket in Rhuddlan and the Morrison's supermarket in Rhyl, as well by town centre facilities in Rhyl and Prestatyn and by the regional centre of Chester, 45 kilometres east along the A55.

6.37 As St Asaph competes with the larger centres of Rhyl, Prestatyn and Denbigh, the extent of the town's hinterland tends to vary depending on the function concerned. Its retail pull may be very restricted, but the town's bilingual high school, Ysgol Glan Clwyd, enrolls pupils from a catchment area of up to 30 kilometres (20 miles). The cattle market is also able to draw in farmers from across the Vale of Clwyd and Clwydian Range and has increased in importance following the closure of Rhyl mart. The small HM Stanley Hospital on the southern edge of the town, however, which has been the main centre for ophthalmology and for stroke and rehabilitation services in the Clwyd and Denbighshire NHS Trust area, was identified for closure at a meeting in September 2006, with services due to be transferred to Ysbyty Glan Clwyd at Bodelwyddan.

6.38 The major retail attraction in the vincinity is located not in the town of St Asaph itself, but in its hinterland at Llannerch Park, 3 kilometres (2 miles) south of the town. The Tweedmills Factory Outlet was described by one interviewee as "the second biggest tourist attraction in North Wales", but as the interviewee continued: "People who go there do not go into town. It is such an effort, it would take a lot to make you stop in St Asaph". The shopping centre was expanded in 2004, creating 50 additional jobs, but the expansion was opposed many businesses in the town who thought that it would take trade from the town. The chairman of the St Asaph Business Association, however, argues that the major factors limiting commercial opportunities in the town are the level of traffic and shortage of parking spaces, making it easier for people from outside the town to travel to the Tweedmills or other out-of-town retail centres to shop.

6.39 The overshadowing of the town by its hinterland is also evident in terms of employment. Employment opportunities in the town itself are relatively limited and total around 1660, slightly more than the working population of the town. Around a quarter of those working in the town also live in the town, The largest group of employees, more than a third, commute in from between 5 and 10 kilometres, a distance encompassing Rhyl, Prestatyn, Abergele and Denbigh (figure 6.5).

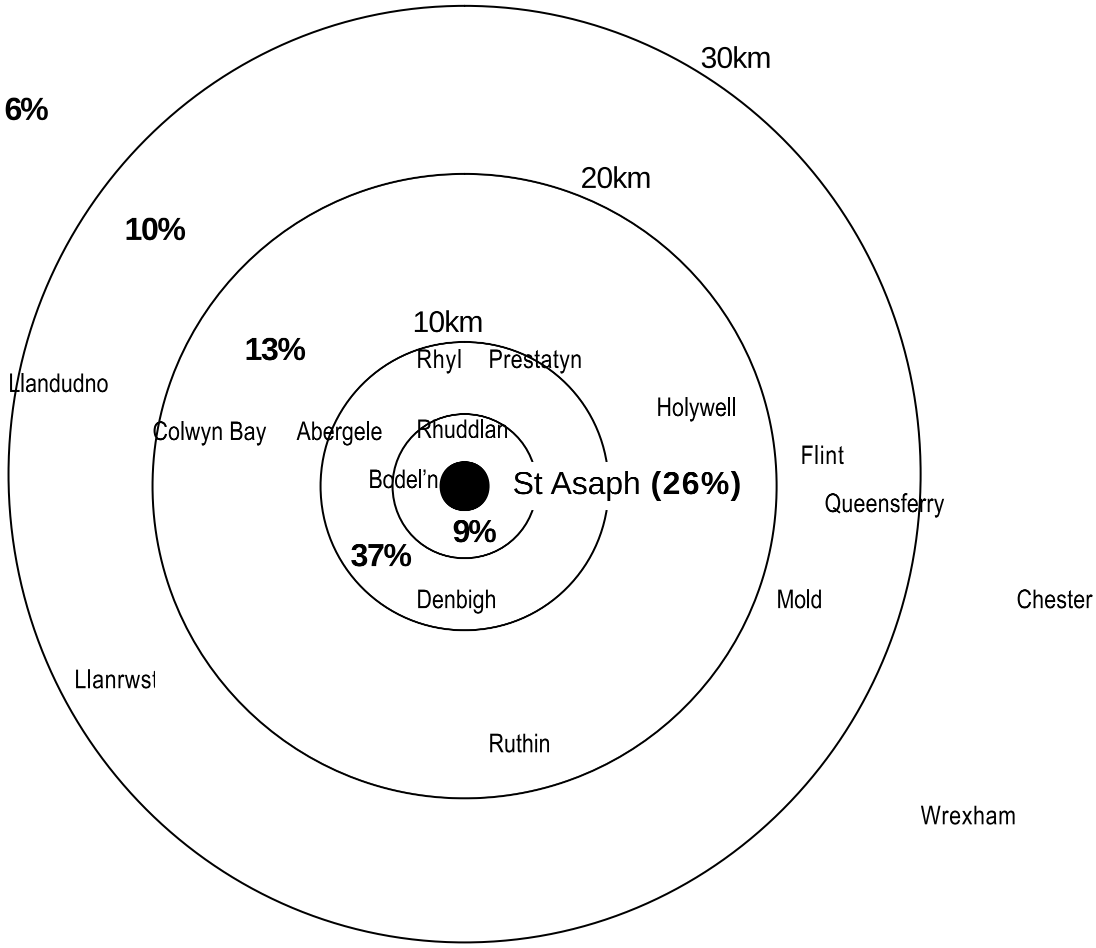

Figure 6.5: Source of workers employed in St Asaph town by distance travelled to work, 2001.

6.40 More employment opportunities, however, are found in the hinterland to the west of the town at and around the St Asaph Business Park. The 44 hectare business park is a recent development by the Welsh Development Agency, located between the A55 and the B3581. Around 2,000 people are now employed on the business park, many of them in companies associated with the glass technology industry. Major employers on the business park include the divisional headquarters of the North Wales Police, the head office of Freeway Healthcare and the Japanese-owned automotive company, TRB (table 6.3). Thales Optics Ltd employs 123 staff on a site adjacent to the business park and the neighbouring Pilkington Special Glass plant employs 112 people.

6.41 The St Asaph Business Park is also the site of the new OpTic Technium, operated by Optopreneurs Ltd and employing 140 personnel. The award of two grants to support the development of the technium from the European Regional Development Fund under Objective 1, worth a combined £8,376,382, has made St Asaph the largest per capita beneficiary of Objective 1 funding of all small towns in Wales.

Company	Industry/Function	Number of employees
Optopreneurs Ltd (OpTic technium)	Glass technology	140
Thales Optics Ltd	Glass technology	123
Pilkington Special Glass	Glass technology	112
TRB	Automotive components	105
Freeway Healthcare Ltd	Healthcare (Head office)	70
Leaver Optics	Glass technology	22
Optokem	Glass technology	20
Greenthumb Ltd	Head office	12
XKS Ltd	IT	10
Welsh Development Agency	Client services	5
Phoenix Optical Glass	Glass technology	n/a
First Consulting	Consultancy	n/a
Zimed Ltd	Medical equipment	n/a
Denbighshire CCET	Training	n/a
British Shielding Windows	Glass	n/a
WS Atkins	Consultancy	n/a
North Wales Web Design and eCommerce	IT	n/a

Table 6.3: Examples of businesses and employers on or adjacent to the St Asaph Business Park

6.42 Accurate statistics on employment and travel to work for the St Asaph Business Park are difficult to obtain as the site crosses the boundary of census output areas and as much of the development of the business park has occurred since the 2001 census. Our survey of a sample of employers suggests that virtually all employees live with 10 kilometres, but in the regional context this radius encompasses several towns. The 2001 census figures for the output area including the Thales Optics factory and part of the business park site similarly show that three-quarters of employees traveled less than ten kilometres to work.

6.43 The significance of the St Asaph hinterland as a source of employment is demonstrated in the travel to work statistics for residents of the town in 2001. These showed that only a third of residents worked in the town itself, but a quarter worked within 5 kilometres of the town – a proportion that is now likely to be higher with the expansion of the business park. A further 28% travel between 5 and 10 kilometres to work in locations including Rhyl, Prestatyn and Denbigh. Despite the relative accessibility of centres such as Chester along the A55, only 11% of St Asaph residents travelled 30 kilometres or more to work (figure 6.6).

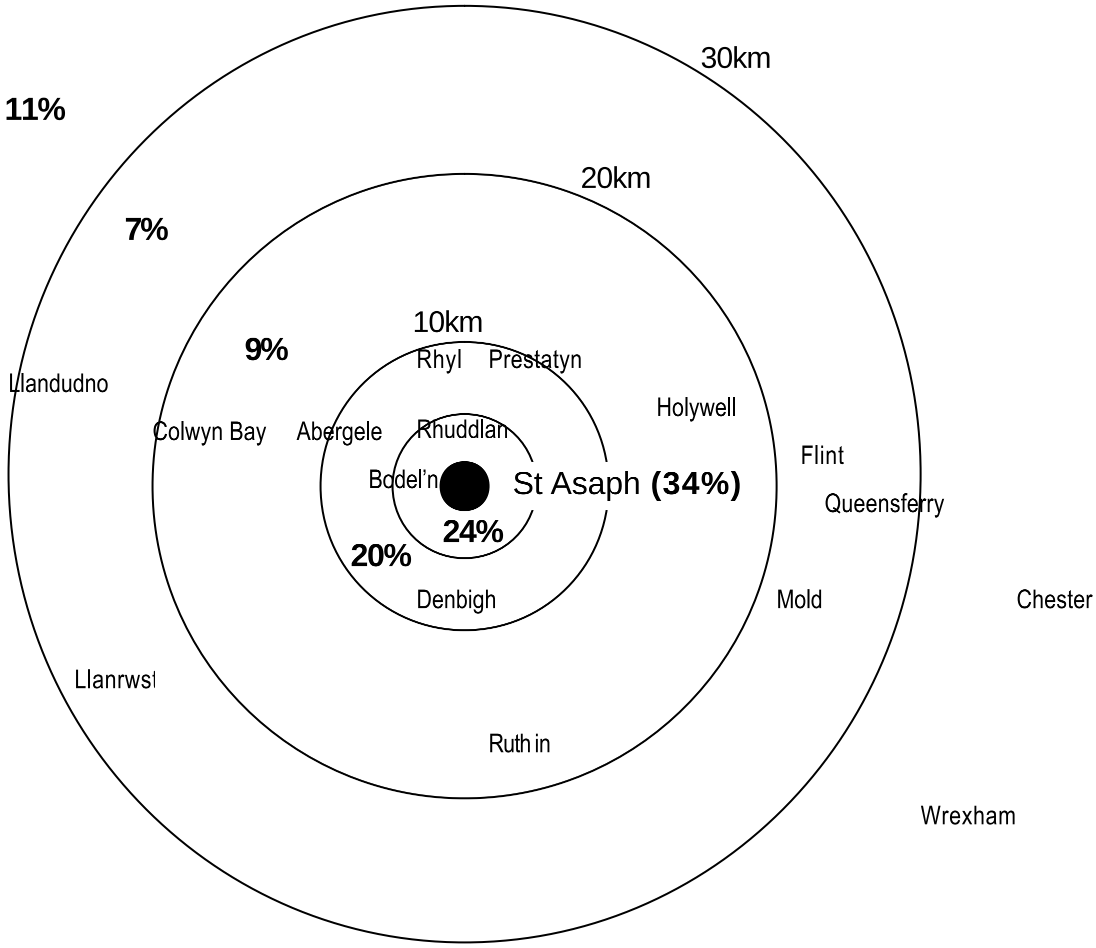

Figure 6.6: Distance to work travelled by working residents of St Asaph town, 2001.

6.44 The St Asaph Business Park is however, to a large extent disconnected from the town. Its location and expansion is dictated more by the accessibility provided by the A55 rather than any particular attribute of St Asaph's as a town, and many of those travelling to work on the business park will never need to go into the town. As one interviewee commented,

> "There tends to be a big split between the businesses in the town and businesses based in the business park. Those in the business park often don't really have much of a connection to the town. They are not concerned with local interests. They just whiz down the A55, they're not interested in the locality."

6.45 The disconnection of the business park and the locality is further evident in the trading relations of enterprises on the park. Most of those we surveyed sourced the majority of their supplies from parts of the UK outside the locality and several sourced up to a third of their supplies from outside the UK. Similarly, none had more than 15% of their customers located in the local area, and two firms, Pilkington Special Glass and H. & D. Fitzgerald sold mostly outside the UK.

6.46 St Asaph therefore operates to different dynamics to the other case study towns, not least because in the town is generally subordinate to the hinterland in terms of employment and retail opportunites, but that employment and retail sites in the hinterland rely in turn not on the local area, but on a much broader geographical catchment, often conducted within particular specialist fields.

Llandeilo

6.47 The final case study, Llandeilo, has a long history as a market and administrative centre serving the rural district of eastern Carmarthenshire. The town benefited from its position on the drovers' route to London and was established as a significant banking centre in the region by 1850. The two markets in the town in the mid nineteenth century serviced not only Llandeilo and its rural hinterland but also the industrial communities of the Amman Valley. The Shire Hall, built in 1802, served as the headquarters of the Carmarthenshire Constabulary, and the town was later the administrative centre of the Dinefwr District Council between 1974 and 1996.

6.48 Located on the Afon Tywi, the built-up area of Llandeilo extends beyond the boundaries of the Llandeilo community, to encompass Ffairfach on the south side of the river, which is the location of the Tregib Secondary School, and Rhosmaen across the A40 road. Thus, whilst the population of Llandeilo community was only 1,731 in 2001, the population of town area expands to 2,540 when Ffairfach and Rhosmaen are included. This population has increased on an accelerating curve – having grown only modestly by 1.7% during the 1980s, the population of Llandeilo increased by 7.1% between 1991 and 2001.

6.49 The legacy of historic role of Llandeilo as a market and administrative centre is evident in the range of services and facilities in the town. Tregib Secondary School has nearly one thousand students drawn from a catchment area extending over 25 kilometres (15 miles), whilst the primary school has around 250 pupils from a similarly extensive catchment area. Carmarthenshire College has an agricultural campus in the town's hinterland, and other public services in Llandeilo include a police station and a job centre. For higher-order public services, however, and for leisure facilities, Llandeilo residents need to travel. The nearest public swimming pool is in Ammanford and the nearest leisure centre in Carmarthen.

6.50 The Wales Rural Observatory Services Survey in 2004 recorded the presence of four banks, three building societies, three general stores, three food-only stores and more than ten non-food shops in Llandeilo. Many of these are small and locally-owned and there are relatively few chain stores in the town. The town has two small supermarkets, a Co-op and an independent supermarket, CK's, both of which attract customers from the rural districts of north-east Carmarthenshire, with around a fifth of customers travelling more than 10 kilometres. Increasingly, however, for both convenience and comparison goods, residents of Llandelilo and nearby communities are travelling to shop in Carmarthen, Ammanford, Llanelli, Swansea and at the out-of-town retail developments at Cross Hands, 12 kilometres south-west of the town.

6.51 The employment opportunities in Llandeilo itself are also limited. The 2001 census recorded 1164 people working in Llandeilo, around 100 more than the working population of the town, but representing only 23% of jobs within the Llandeilo travel-to-work area. There is essentially no significant industry in the town itself, and as such the larger employers tend to be in the public, voluntary, hospitality and retail sectors. These include the secondary school, which employs more than 100 staff and the primary school which employs nearly 30 staff; the regional office of the Countryside Council for Wales, which employs 25 staff, and the regional office of the National Trust, which employs 14 staff. CK's supermarket employs 80 staff and the Co-op employs more than 30 staff, and there are several hotels and merchants that employ more than 20 people. Many of the jobs in the retail and hospitality sectors are however low-paid, part-time or temporary jobs. Perhaps significantly, whilst almost all employees in the commercial businesses surveyed were reported to live within 10 kilometres of Llandeilo, around a fifth to a quarter of staff in the public and voluntary sector workplaces were reported to travel more than 10 kilometres to work. Indeed, although the volume of commuting into Llandeilo is relatively small at around 715 commuters, two-fifths of the workforce travel into the town from between five and twenty kilometres, a distance that includes both rural communities such as Talley, Llanegwad and Pumsaint, and former mining and industrial communities such as Ammanford, Gorslas and Glanaman (figure 6.7).

6.52 The volume of commuting out of Llandeilo is however even more limited, with only around 500 residents travelling out of the town to work. Overall, just under half of residents work in Llandeilo itself. The Dairy Farmers of Britain creamery at Llangadog had been a significant employer in the hinterland before its closure in 2005 with the loss of 200 jobs. Employment opportunities in the hinterland were also diminished by the closure of the Hanson concrete plant, also in Llangadog, three years earlier in 2002, which may have contributed to the increase in the number of claimants of Jobseeker's Allowance in Llandeilo between 2000 and 2003 against the prevailing trend. Remaining employers in the hinterland are significantly smaller, including Brecon Beacons Water at Trapp, which employs 20 personnel, and the Aberglasney Restoration Trust, which employs 19. More significant is longer-distance commuting to Carmarthen, Llanelli and Swansea. As figure 6.8 shows, nearly a third of Llandeilo residents travel between five and thirty kilometres to their place of work.

6.53 Increasingly, however, the economy of Llandeilo is building on the exploitation of tourism and niche retail markets. The attractive composition and location of the town, combined with the National Trust property of Dynevor Park on the edge of town and proximity of Aberglasney gardens, brings tourists and day visitors into Llandeilo. These help to support hotels, restaurants and shops in the town, including a growing range of specialist shops which in turn are attracting their own dedicated custom from the wider region. Listings by yell.com, for example, include three antique dealers, two art galleries and one craft shop in Llandeilo, as well as the Trapp Craft Centre in the hinterland, and a number of specialist food shops. As table 6.4 shows, these businesses as well as others in the town, including hotels and restaurants, draw a significant proportion of their custom from outside the local area.

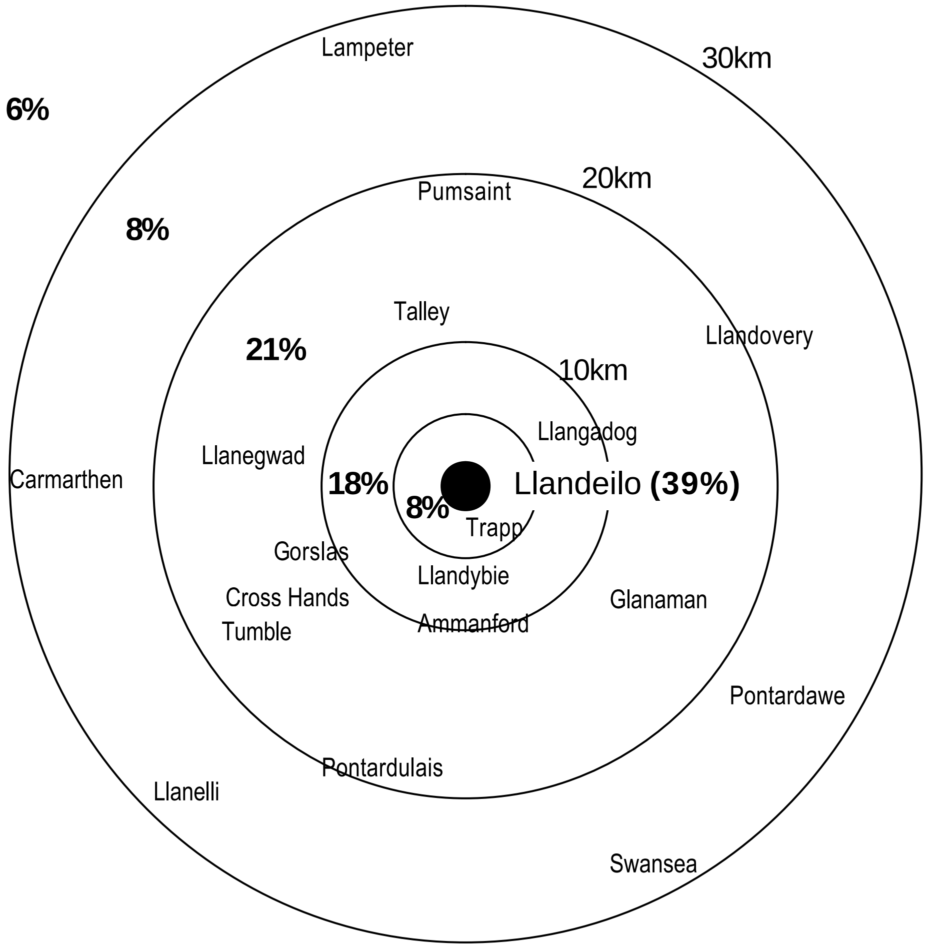

Figure 6.7: Source of workers employed in Llandeilo by distance travelled to work, 2001.

	Customers		
Business	**Local**	**Other UK**	**Outside UK**
Hotel/restaurant	40%	55%	5%
Butcher	60%	40%	
Antiques	20%	45%	35%
Antiques	50%	50%	
Crafts	10%	80%	10%
Shoe shop	80%	20%	
Pub/restaurant	80%	20%	

Table 6.4: Estimated source of customers for selected businesses in Llandeilo

6.54 The ‘niche’ positioning of Llandeilo is being further developed by an initiative for Llandeilo to become the first ‘slow food town’ in Wales as part of the Cita Slow movement. The initiative is aimed at promoting the town’s reputation for locally-sourced quality food, linking restaurants and specialist food shops, as well as the farmers market. Significantly, the initiative’s organizer sees the project as a catalyst for the wider regeneration of the town, not just the food sector.

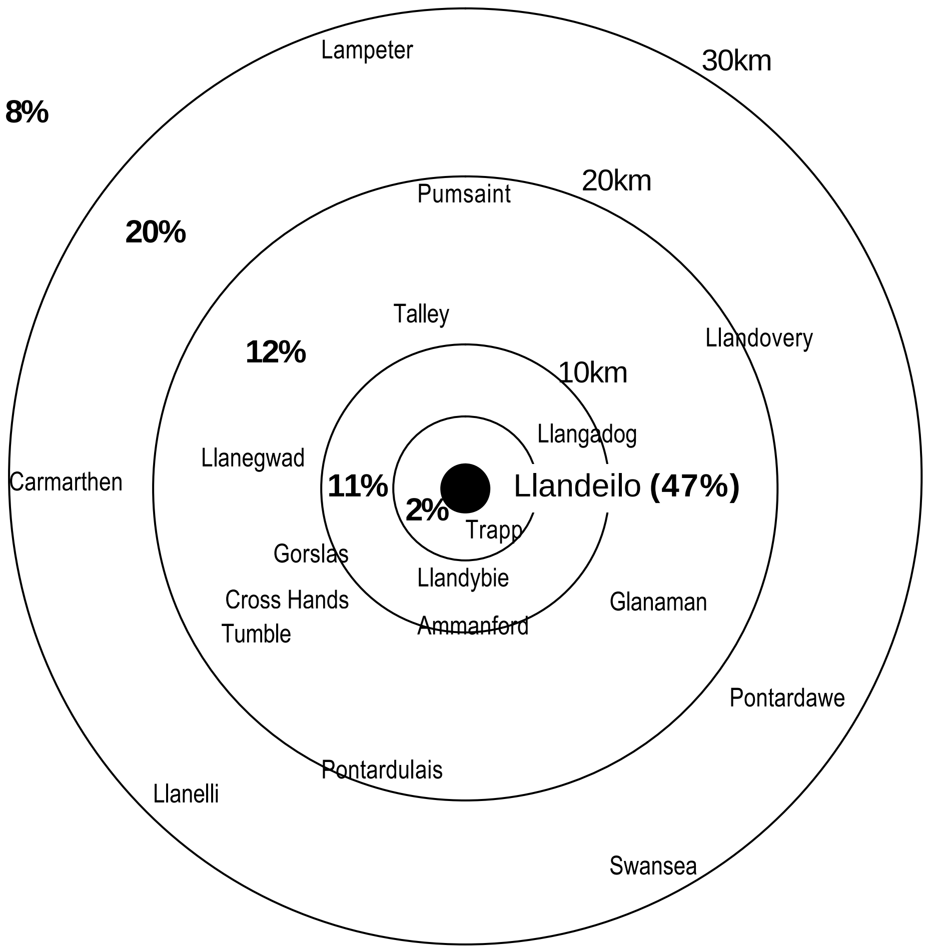

Figure 6.8: Distance to work travelled by working residents of Llandeilo, 2001.

CHAPTER 7: CONCLUSION

7.1 Small and market towns occupy a distinctive position in the Welsh geographical hierarchy. As a group they exhibit different characteristics, and respond to different dynamics, than either larger urban and fringe areas that intrude into the edge of the nine core counties of rural Wales, or the residual rural areas. Yet, it would also be erroneous to treat small and market towns as a single homogeneous category. The towns of rural Wales vary considerably not only by population size and geographical setting, but also in terms of their service function and range of facilities offered, employment opportunities and patterns, population trends and characteristics and levels of investment. This variety presents a challenge in developing policy for small towns and incorporating them into the spatial planning process, in that a 'single-size' strategy will not fit all.

7.2 In order to begin to conceptualise the differences between individual small and maket towns, we propose six ideal-type models which we describe below. As ideal-types, the models are not intended to accurately describe the features of particular small towns in Wales and it may not be possible to categorise all small towns in Wales along this schema. Indeed, it is possible for some towns to exhibit characteristics of more than one model. However the models do permit us to highlight some of the key characteristics of groupings of small towns and to link these to the roles that those towns play within their wider districts (see also Appendix M).

7.3 **Sub-Regional Centres:** Sub-regional centres perform higher order service functions to a fairly extensive rural areas. They possess relatively high order public services and facilities, including hospitals with accident and emergency departments, further education colleges and county courts, and also have a comparably wide range of retail opportunities, including comparison goods stores and branches of national chains. Sub-regional centres also have a strong employment base, with significantly more jobs than working residents and a relatively high level of commuting into the town to work. They tend to have received significant recent investment from both public and private sources, and have a strongly increasing population. Only four towns in rural Wales can be described as sub-regional centres: Aberystwyth, Bangor, Carmarthen and Haverfordwest.

7.4 **Anchor Towns:** Anchor towns provide commerical, social and administrative functions to an identifiable rural district. They do not possess facilities and functions of the same order as sub-regional centres, and will typically rely on sub-regional centres for higher-order functions. They do however have a significant range of middle-order functions, including community hospitals, large secondary schools, police stations, magistrates' courts and may host local government offices. Anchor towns have an established retail core, but have fewer larger stores and fewer chain stores than sub-regional centres. Residents may travel to sub-regional centres for comparison good shopping, but the town is able to draw customers for its hinterland for convenience shopping. Anchor towns have a significant employment base relative to their population, they tend to be a major provider of employment for their rural district and have a high level of commuting-in to work. They may have received substantial awards from the ERDF or the Community Fund, usually to support projects and organizations that also serve the wider district. Examples of anchor towns in rural Wales include Llandrindod Wells, Brecon and Llangefni.

7.5 **Island Towns.** Island towns are often located comparatively close to larger centres but retain a strong degree of independence and have not become dependent on other towns for employment or services. Island towns tend to have sufficient employment opportunities to accommodate their working population and a large proportion of town residents also work in the town, but relatively few workers commute into the town to work. Island towns also have a fair range of public and commercial services, typically including secondary schools, police stations, public libraries and small supermarkets. The retail base of their town centres tends however to be limited, meeting the regular convenience needs of the town residents but not attracting significant trade from a wider area. The effective hinterland of an island town is hence very limited and residents of nearby settlements often look past the town to other larger centres for employment or services. Examples of island towns in rural Wales include Llanidloes.

7.6 **Doughnut Towns.** The defining characteristic of a doughnut town is the strength of activity in its hinterland. The town itself may have a limited employment and service base, but the immediate hinterland includes significant employers (either a single employer or a business park with multiple employers) and retail centres. These may be established industries or relatively new developments. Residents of the town may travel out to the hinterland for work and or retail purposes, whilst the facilities in the hinterland may serve not only the town but also a wider area. Examples of doughnut towns in rural Wales include St Asaph.

7.7 **Satellite Towns.** Satellite towns are located close to much larger centres and are effectively dependent on the larger centre for employment and services. The number of jobs in the town will typically be lower than the size of the working population, relatively few residents are employed in the town and there is a high net outflow of commuters. Services in the town will typically be limited and of a low-order with residents travelling to other towns and centres for shopping and leisure. Community activity may be weak and this may be reflected in a low level of awards from the Community Fund. Examples of satellite towns in rural Wales include Caldicot, Crickhowell and Llanrwst.

7.8 **Niche Towns.** Niche towns have responded to the decline of their traditional service function by captializing on particular specialist attractions or markets. As such they are often able to sustain a higher than anticipated level of services and employment, supported by tapping into custom from visitors from outside the immediate local area. Examples of niche towns in rural Wales include Llandeilo, Hay-on-Wye and Llangollen.

7.9 The analysis in this report suggest that a broad range of factors operate in shaping the development of each type of small town, including not only population size and proximity to larger centres, but also accessibility to major transport routes, historical role, the nature of the economic base, planning policy and local initiative. There is however scope for further research to build on this report by examining the precise dynamics involved.

7.10 The priorities and challenges for small towns therefore vary between these types. Sub-regional centres need support for infrastructure to maintain and attract high-order public and commercial functions, as well as investment of in transport links to the districts they serve. Anchor towns need to maintain the patronage of their hinterlands against competition from larger centres and thus require investment in the retail and employment infrastructure as well as in transport links to the surrounding area. Island towns need to maintain the services and employers that they have and should seek to strengthen links with neighbouring communities. Doughnut towns need to attempt to attract workers and visitors at sites in the hinterland into the town, as well as ensuring that adequate public transport links are in place between the town and key sites in the hinterland. Satellite towns may prioritise residential needs, or may seek developments that might tap into wider markets or help to develop specialist niches to attract tourists. Niche towns need strategies to maintain visitor levels, exploit local specialisms and ensure that local businesses and residents benefit.

7.11 What unites the different types of small town, however, is their particular 'urban form' – that is the concentration of economic, residential, social and administrative functions and land use together in one place. The success of out-of-town developments such as the St Asaph Business Park or the Cross Hands Retail Park may suggest that in the contemporary world, employment and service centres in rural regions may not need necessarily to be tied to the urban form of the small town, but may alternatively prosper in greenfield sites close to major transport routes. This trend, however, raises significant environmental questions about the impact of the separation of employment, residence, retail and leisure on the need for vehicle journeys. The historic form of the small town through its very compactness and mixed function a potentially most sustainable way of delivering key services and employment opportunities in a rural region which may become increasingly attractive in the twenty-first century.

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APPENDIX A: SMALL TOWNS IN RURAL WALES IDENTIFIED FROM WARD LEVEL DATA

*** Towns not included in ward-level analysis in report.**

Town	ONS Classification	Wards	Population 2001
YNYS MON			
Amlwch	Town & Fringe	Amlwch Port	1391
Beaumaris	Town & Fringe	Beaumaris	2040
Benllech	Town & Fringe	Llanbedrgoch,	1586
Cemaes	Town & Fringe	Llanbadrig	1392
Holyhead	Urban (Sparse)	Holyhead Town, Kingsland, London Rd, Maeshyfryd, Morawelon, Parc a'r Mynydd, Pontrhydfelin	11237
Llanfair PG	Town & Fringe	Briant, Gwyngyll	3040
Llangefni	Town & Fringe	Cefni, Cyngar, Tudur	4662
Menai Bridge	Town & Fringe	Cadnant, Tysilio	3146
Rhosneigr	Town & Fringe	Rhosneigr	994
Valley	Town & Fringe	Valley	2413
GWYNEDD			
Aberdaron	Town & Fringe	Aberdaron	1019
Abersoch	Town & Fringe	Abersoch	901
Bala	Town & Fringe	Bala	1980
Bangor	Urban (less sparse)	Deiniol, Dewi, Garth, Glyder, Hendre, Hirael, Marchog, Menai, Pentir	16130
Barmouth	Town & Fringe	Abermaw	2437
Bethesda	Town & Fringe	Gerlan, Ogwen	4515
Blaenau Ffestiniog	Town & Fringe	Bowydd a Rhiw, Diffwys a Maenofferen	2950
Caernarfon	Town & Fringe	Menai, Peblig, Cadnant, Seinot	9611
Criccieth	Town & Fringe	Criccieth	1826
Deiniolen	Town & Fringe	Deiniolen	1759
Dolgellau	Town & Fringe	Dolgellau North, Dolgellau South	2678
Llanberis	Town & Fringe	Llanberis	2018
Llanrug	Town & Fringe	Llanrug	1822
Nefyn	Town & Fringe	Nefyn	1359
Penrhynddeudraeth	Town & Fringe	Penrhynddeudreaeth	2467
Penygroes	Town & Fringe	Penygroes	1770
Porthmadog	Town & Fringe (PE) Village (PW)	Porthmadog East, Porthmadog West*	3523
Pwllheli	Town & Fringe (PN) Village (PS)	Pwllheli North, Pwllheli South*	3861
Tywyn	Town & Fringe	Tywyn	3227
CONWY			
Conwy	Town & Fringe (Less sparse)	Conwy	4080
Llanfairfechan	Town & Fringe (Less sparse)	Bryn, Pandy	3755
Llanrwst	Town & Fringe	Crwst, Gower	3037
Penmaenmawr	Town & Fringe (Less sparse)	Capelulo, Pont-yr-afon	3587

DENBIGHSHIRE			
Bodelwyddan	Town & Fringe (Less sparse)	Bodelwyddan	2106
Corwen*	Village, Hamlet & Isolated Dwellings (Sparse)	Corwen	2398
Denbigh	Town & Fringe (Less sparse)	Denbigh Central, Denbigh Lower, Denbigh Upper/Henllan	9528
Llangollen	Town & Fringe (Less sparse)	Llangollen	3884
Rhuddlan	Town & Fringe (Less sparse)	Rhuddlan	4296
Ruthin	Town & Fringe (Less sparse)	Ruthin	5218
St Asaph	Town & Fringe (Less sparse)	St Asaph East, St Asaph West	3491
POWYS			
Brecon	Town & Fringe	St David Within, St John, St Mark	7901
Builth Wells	Town & Fringe	Builth	2352
Crickhowell	Town & Fringe (Less sparse)	Crickhowell	2767
Hay on Wye	Town & Fringe	Hay on Wye	1469
Knighton	Town & Fringe	Knighton	3043
Llandrindod Wells		Llandrindod East/West, Llandrindod North, Llandrindod South	5024
Llanfair Caereinion*	Village, Hamlet and Isolated Dwellings	Llanfair Caereinion	1616
Llanfyllin*	Village, Hamlet and Isolated Dwellings	Llanfyllin	1407
Llanidloes	Town & Fringe	Llanidloes	2807
Llanwyrtyd Wells*	Village, Hamlet and Isolated Dwellings	Llanwyrtyd Wells	1727
Machynlleth	Town & Fringe	Machynlleth	2147
Montgomery*	Village, Hamlet and Isolated Dwellings	Montgomery	1257
Newtown	Urban (Sparse)	Newtown Central, Newtown East, Newtown South, Llanllwchaiarn North, Llanllwchaiarn South	10783
Presteigne	Town & Fringe	Presteigne	2463
Rhayader	Town & Fringe	Rhayader	2075
Talgarth	Town & Fringe	Talgarth	1645
Welshpool	Town & Fringe	Castle, Gungrog, Llanerchyddol	6269
CEREDIGION			
Aberaeron	Town & Fringe	Aberaeron	1520
Aberystwyth	Urban (Sparse)	Bronglais, Central, Penparcau, Rheidol, Faenor, Llanbadarn Padarn, Llanbadarn Sulien	16928
Cardigan	Town & Fringe	Mwldan, Rhyd-y-Fuwch, Teifi	4203
Lampeter	Town & Fringe	Lampeter	2894
Llandysul	Town & Fringe	Llandysul Town	1521
New Quay	Town & Fringe	New Quay	1115

Tregaron*	Village, Hamlet and Isolated Dwellings	Tregaron	1217
PEMBROKESHIRE			
Fishguard	Town & Fringe (Fishguard); Village (Goodwick)	Fishguard North East, Fishguard North West, Goodwick	5045
Haverfordwest	Urban (Less sparse)	Castle, Garth, Portfield, Pendregast, Priory, Merlins Bridge,	12991
Milford Haven	Urban (Less sparse)	Central, East, Harkin, Hubberston, North, West	13086
Narbeth	Town & Fringe	Narbeth	1869
Newport	Town & Fringe	Newport	1122
Neyland	Town & Fringe (Less sparse)	Neyland East, Neyland West	4180
Pembroke	Town & Fringe (Less sparse)	Monkton, St Mary North, St Mary South, St Michael	7214
Pembroke Dock	Town & Fringe (Less sparse)	Central, Llanion, Market, Pennar	8676
St Davids	Town & Fringe	St Davids	1797
Saundersfoot	Town & Fringe	Saundersfoot	2784
Tenby	Town & Fringe	Tenby North, Tenby South	4934
CARMARTHENSHIRE			
Carmarthen	Urban (Sparse)	Carmarthen Town North, Carmarthen Town South, Carmarthen Town West, Llangunnor	15412
Kidwelly	Town & Fringe (Less sparse)	Kidwelly	3289
Llandeilo	Town & Fringe (Less sparse)	Llandeilo	2937
Llandovery	Town & Fringe	Llandovery	2870
Newcastle Emlyn*	Village, Hamlet and Isolated Dwellings	Cenarth (part) (Carmarthen) & Llandyfriog (part) (Ceredigion)	3816
Pembrey and Burry Port	Town & Fringe (Less sparse)	Burry Port, Pembrey	7957
St Clears*	Village, Hamlet and Isolated Dwellings	St Clears	2820
Trimsaran	Town & Fringe (Less sparse)	Trimsaran	2533
Whitland*	Village, Hamlet and Isolated Dwellings	Whitland	2066
MONMOUTHSHIRE			
Abergavenny	Urban (Less Sparse)	Cantref, Castle, Croesonen, Grofield, Lansdown, Llanfoist Fawr, Mardy, Priory	15255
Caldicot	Urban (Less Sparse)	Caldicot Castle, Dewstow, Green Lane, Portskewett, Severn, West End	11796
Chepstow	Urban (Less Sparse)	St Christopher, St Kingsmark, St Marys, Larkfield, Thornwell	10821
Monmouth	Town & Fringe (Less Sparse) / Village (DwO)	Dixton with Osbaston, Drybridge, Overmonnow, Wyesham	8877
Raglan	Town & Fringe (Less sparse)	Raglan	1706
Usk	Town & Fringe (LS)	Usk	2318

APPENDIX B: SUB-SET OF SMALL TOWNS FOR FURTHER ANALYSIS, DEFINED BY WARDS AND CENSUS OUTPUT AREAS

Town	Wards	Census Output Areas	Population 2001	
			Wards	COAs
YNYS MON				
Llangefni	Cefni, Cyngar, Tudur	00NAML0002 – 5 00NAMN0002 – 6 00NANQ0001 –5	4662	4102
Holyhead	Holyhead Town, Kingsland, London Rd, Maeshyfryd, Morawelon, Parc a'r Mynydd, Pontyfelin	00NAMQ001 – 4 00NAMR001 – 5 00NAND001 – 5 00NANE001 – 8 00NANH001 – 5 00NANJ001 – 4 00NANL001 – 8 00NANP0004	11237	11604
GWYNEDD				
Bala		00NCQG0001 - 7	1980	1980
Bangor	Deiniol, Dewi, Garth, Glyder, Hendre, Hirael, Marchog, Menai, Pentir	00NCQU0001 – 5 00NCQX0001 –5 00NCRE0001 –2 00NCRG0001 – 6 00NCRK0001 – 5 00NCRL0001 – 5 00NCSA0001 – 8 00NCSB0001 – 5 00NCSK0001, 2, 6, 7 00NCQF0002	16130	15573
Blaenau Ffestiniog	Bowydd a Rhiw, Diffwys a Maenofferen	00NCQL0002 6 00NCQY0001 – 4 00NCSW0002 - 4	2950	3391
Caernarfon	Menai, Peblig, Cadnant, Seinot	00NCSG0001 – 7 00NCSC0001 – 8 00NCQP0001 –3 & 5-8 00NCST0001 - 12	9611	9201
Dolgellau	Dolgellau North, Dolgellau South	00NCRA0002 – 5 00NCRB0001 – 5	2678	2407
Porthmadog	Porthmadog East, Porthmadog West	00NCSM0001 – 6 00NCSN0001, 3-5, & 7	3523	3008
Pwllehli	Pwllheli North, Pwllheli South	00NCSQ0001 – 7 00NCSR0001 - 7	3861	3861
CONWY				
Llanrwst	Crwst, Gower	00NEPD0001 – 7 00NEPL0001 – 4	3037	3037
DENBIGHSHIRE				
Denbigh	Denbigh Central, Denbigh Lower, Denbigh Upper/Henllan	00NGNM0001 – 7 00NGNN0001 & 3-14 00NGNP0001-5 & 7-8	9528	8236
Llangollen	Llangollen	00NGNY0001-3, 5-7, 9-10 & 12-13.	3884	2627

Ruthin	Ruthin	00NGPM0001 - 19	5218	5218
St Asaph	St Asaph East, St Asaph West	00NGPN0001 – 6 00NGPP0001 – 6	3491	3491
POWYS				
Brecon	St David Within, St John, St Mark	00NNSY0001 – 6 00NNSZ0001 – 11 00NNTA0001 - 10	7901	7901
Builth Wells	Builth	00NNQN0001 – 8 00NNRG0001 00NNRR0005	2352	2640
Crickhowell	Crickhowell	00NNQS0001-6	2767	1836
Hay on Wye	Hay	00NNRD0001 – 6	1469	1469
Knighton	Knighton	00NNRF0001-3, 5-7 & 11	3043	1828
Llandrindod Wells	Llandrindod East/West, Llandrindod North, Llandrindod South	00NNRL0001 – 5 00NNRM0001 – 6 00NNRN0001 – 8	5024	5024
Llanidloes	Llanidloes	00NNSA0001 – 11	2807	2807
Machynlleth	Machynlleth	00NNSG0001 – 8	2147	2147
Newtown	Newtown Central, Newtown East, Newtown South, Llanllwchaiarn North, Llanllwchaiarn South	00NNSM0001 – 11 00NNSN0001 & 3-8 00NNSP0002 – 7 00NNSQ0001 –6 00NNSR0001 - 6	10783	10358
Presteigne	Presteigne	00NNSU0001 - 7	2463	1868
Rhayader	Rhayader	00NNSW0002 – 7	2075	1783
Welshpool	Castle, Gungrog, Llanerchyddol	00NNTF0001 – 4 & 6 00NNTG0001 – 9 00NNTH0001–6 & 8-9	6269	5802
CEREDIGION				
Aberaeron	Aberaeron	00NQNP0001 – 6	1520	1520
Aberystwyth	Bronglais, Central, North, Penparcau, Rheidol, Faenor, Llanbadarn Padarn, Llanbadarn Sulien	00NQNU0001 – 4 00NQNW0001 – 8 00NQNX0001 – 6 00NQNY0001 – 10 00NQNZ0001 – 9 00NQPF0001 – 4 & 7 00NQPJ0001 – 4 00NQPK0001 – 3 00NQPP0001 – 2	16928	16889
Cardigan	Mwldan, Rhyd-y-Fuwch, Teifi	00NQNR0001 – 7 00NQNS0001 – 5 00NQNT0001 – 4	4203	4203
Lampeter	Lampeter	00NQPG0001 – 9	2894	2894
PEMBROKESHIRE				
Fishguard	Fishguard North East, Fishguard North West, Goodwick	00NSPS0001 – 6 00NSPT0001 – 5 00NSPU0001 - 6	5045	5045
Haverfordwest	Castle, Garth, Portfield, Pendregast, Priory, Merlins Bridge,	00NSPW0001 – 8 00NSPX0001 – 9 00NSPY0001 – 8 00NSPZ0001 – 6 00NSQA0001 – 8 00NSQN0001 – 7	12991	13954

		00NSRL0002, 4 & 6		
Milford Haven	Central, East, Harkin, Hubberston, North, West	00NSQP0001 – 7 00NSQQ0001 – 8 00NSQR0001 –8 00NSQS0001 –8 00NSQT0001 –7 00NSQU0001 - 8	13086	13086
Pembroke	Monkton, St Mary North, St Mary South, St Michael	00NSRF0001 –5 00NSRG0001 –6 00NSRH0001 – 5 00NSRJ0002 – 8	7214	6954
Pembroke Dock	Central, Llanion, Market, Pennar	00NSRB0001 –6 00NSRC0001 –9 00NSRD0001 – 6 00NSRE0001 – 10	8676	8676
Tenby	Tenby North, Tenby South	00NSRT0001 – 8 00NSRU0001 – 11	4934	4934
CARMARTHENSHIRE				
Carmarthen	Carmarthen Town North, Carmarthen Town South, Carmarthen Town West, Llangunnor	00NUQC0001 – 18 00NUQD0001 - 11 & 13-14 00NUQE0001 – 14 00NURK0001 – 3 & 5 - 8	15412	14840
Llandeilo	Llandeilo	00NURA0001-2 & 5-11 00NURS0004	2937	2540
Llandovery	Llandovery	00NURB0001 – 8	2870	2235
Newcastle Emlyn	Cenarth, Llandyfriog	00NUQF0005 – 7 00NQPL0001 & 4-5	3816	1700
MONMOUTHSHIRE				
Abergavenny	Cantref, Castle, Croesonen, Grofield, Lansdown, Llanfoist Fawr, Mardy, Priory	00PPNS0001 – 10 00PPNT0001 – 2 00PPNU0001 – 6 00PPPD0001 – 7 00PPPE0001 – 6 00PPPJ0001-2 & 6-7 00PPPP0003 – 7 00PPPU0001 – 10	15255	14051
Caldicot	Caldicot Castle, Dewstow, Green Lane, Portskewett, Severn, West End	00PPNR0001 – 8 00PPNY0001 –5 00PPPC0001 – 3 00PPQC0001 – 11 00PPQJ0001 – 5 00PPPT0001 - 6	11796	11594
Chepstow	St Christopher, St Kingsmark, St Marys, Larkfield, Thornwell	00PPPZ0001 – 6 00PPQA0001 – 8 00PPQB0001 – 7 00PPPF0001 – 4 00PPQF0001 - 11 00PPPY0002 23UDHJ0001-3, 5-11 & 19	10821	14317
Monmouth	Dixton with Osbaston, Drybridge, Overmonnow, Wyesham	00PPNZ0001 – 3 & 5 00PPPA0001 – 10 00PPPS0001 – 9 00PPQK0001-5 & 7-8	8877	8547

APPENDIX C: KEY STATISTICS FOR POPULATION CHANGE AND AGE FOR SELECTED SMALL TOWNS

Town	Population Change 1981-1991	Population Change 1991-2001	Population Change 1981-2001	Dominant trend	Mean Age of Population 2001	Variance from county mean age
Llangefni	+0.9%	+1.3%	+2.2%	Stable	40.4	-0.7
Holyhead	-7.1%	-2.7%	-9.6%	Decline	38.4	-2.7
Bala	+1.2%	+1.2%	+6.9%	Steady growth	42.0	+1.6
Bangor	+13.0%	+3.0%	+16.3%	Slowing growth	35.1	-5.3
Blaenau Ffestiniog	n/a	n/a	n/a	N/a	40.1	-0.3
Caernarfon	-0.3%	+1.9%	+1.6%	Fluctuating	38.8	-1.6
Dolgellau	n/a	n/a	n/a	N/a	44.1	+3.7
Porthmadog	n/a	n/a	n/a	N/a	43.3	+2.9
Pwllheli	-3.3%	-0.5%	-3.8%	Decline	42.0	+1.6
Llanrwst	+3.0%	+0.2%	+3.2%	Slowing growth	41.4	-1.7
Denbigh	+4.2%	+1.4%	+5.7%	Steady growth	39.2	-2.2
Llangollen	n/a	n/a	n/a	N/a	43.9	+2.5
Ruthin	+12.2%	+4.2%	+16.9%	Slowing growth	43.0	+1.6
St Asaph	+3.3%	-1.0%	+2.4%	Fluctuating	41.5	+0.1
Brecon	+6.5%	-0.5%	+5.9%	Fluctuating	39.7	-2.0
Builth Wells	+12.0%	+16.6%	+30.6%	Continuing strong growth	40.5	-1.2
Crickhowell	n/a	n/a	n/a	N/a	43.7	+2.0
Hay on Wye	+4.8%	+7.7%	+12.8%	Continuing strong growth	43.4	+1.7
Knighton	n/a	n/a	n/a	N/a	41.1	-0.6
Llandrindod Wells	+13.1%	+2.6%	+16.1%	Slowing growth	42.3	+0.5
Llanidloes	-0.1%	+9.2%	+9.1%	Fluctuating	43.8	+2.1
Machynlleth	+1.7%	+5.7%	+7.5%	Steady growth	42.4	+0.7
Newtown	+11.0%	+4.8%	+16.3%	Slowing growth	37.3	-4.4
Presteigne	+13.9%	+17.1%	+33.4%	Continuing strong growth	44.8	+3.1
Rhayader	+5.5%	+0.6%	+6.2%	Slowing growth	45.1	+3.4
Welshpool	+8.9%	+7.1%	+16.6%	Continuing strong growth	40.9	-0.8
Aberaeron	+0.2%	+5.0%	+5.2%	Steady growth	46.9	+6.4

Town	Population Change 1981-1991	Population Change 1991-2001	Population Change 1981-2001	Dominant trend	Mean Age of Population 2001	Variance from county mean age
Aberystwyth	+3.4%	+36.7%	+43.4%	Accelerating growth	34.9	-5.6
Cardigan	+2.8%	-1.8%	+1.1%	Fluctuating	42.3	+1.8
Lampeter	+27.9%	+8.8%	+39.1%	Slowing growth	38.5	-2.0
Fishguard	+0.8%	+1.4%	+2.2%	Stable	43.6	+2.7
Haverfordwest	-1.8%	+0.4%	-1.4%	Fluctuating	37.7	-3.2
Milford Haven	-4.2%	-2.4%	-6.5%	Decline	39.2	-1.7
Pembroke	+0.6%	+1.2%	+1.8%	Stable	39.4	-1.5
Pembroke Dock	+0.9%	+2.1%	+3.0%	Steady growth	37.5	-3.4
Tenby	+5.7%	-3.2%	+2.3%	Fluctuating	42.7	+1.8
Carmarthen	+0.6%	+3.5%	+4.2%	Steady growth	40.5	-0.6
Llandeilo	+1.7%	+7.1%	+8.9%	Accelerating growth	43.5	+2.4
Llandovery	n/a	n/a	n/a	N/a	42.4	+1.3
Newcastle Emlyn	n/a	n/a	n/a	N/a	n/a	n/a
Abergavenny	n/a	n/a	n/a	N/a	42.1	+1.3
Caldicot	-2.6%	-0.8%	-3.4%	Decline	38.9	-1.8
Chepstow	+1.1%	+16.0%	+17.2%	Accelerating growth	38.5	-2.3
Monmouth	+10.7%	+7.1%	+18.5%	Continuing strong growth	41.8	+1.0

Source: Census 1981, 1991, 2001.

Note: Population growth is calculated from comparison of population recorded at a community level. This has only been possible for towns where there is a relatively good fit between the town area and the community boundaries. Other towns are recorded as n/a.

APPENDIX D: KEY STATISTICS FOR SELECTED SMALL TOWNS FROM THE INDEX OF MULTIPLE DEPRIVATION (2000)

Town	Mean IMD score for town wards	Range of IMD scores for town wards	(Range of) Rank in IMD for Wales	Mean IMD score for adjacent rural wards	Difference between town mean & rural mean	Range of ranks in IMD for Wales of adjacent rural wards
Llangefni	25.41	9.73 – 42.25	73 – 686	17.37	+8.04	311-531
Holyhead	36.95	22.75 – 52.08	40 – 328	12.91	+24.04	608
Bala	19.59	-	400	19.08	+0.51	396-439
Bangor	21.32	6.39 – 62.35	18-791	n/a	n/a	n/a
Blaenau Ffestiniog	37.89	30.85 – 44.92	74 – 187	19.51	+18.38	277 – 538
Caernarfon	36.09	13.05 – 67.93	6 – 599	14.43	+21.66	505 – 605
Dolgellau	17.05	-	484	n/a	n/a	n/a
Porthmadog	13.14	7.22 – 17.35	474 – 770	18.31	-5.17	395 – 483
Pwllheli	33.91	28.53 – 39.28	100 – 225	18.58	+15.33	376 – 507
Llanrwst	17.74	15.28 – 20.21	389 – 532	15.05	+2.69	471 – 627
Denbigh	56.02	4.48 – 28.90	221 – 833	12.72	+43.3	397 – 749
Llangollen	13.29	-	590	17.17	- 3.88	167 – 672
Ruthin	6.74	-	779	11.22	- 4.48	397 – 817
St Asaph	10.68	6.41 – 14.94	542 – 790	15.97	- 5.29	284 – 602
Brecon	11.03	5.84 – 13.85	582 – 801	10.08	+0.95	659 – 714
Builth Wells	9.06	-	709	13.01	- 3.95	530 – 665
Crickhowell	9.70	-	688	n/a	n/a	n/a
Hay on Wye	13.50	-	585	n/a	n/a	n/a
Knighton	10.76	-	662	n/a	n/a	n/a
Llandrindod Wells	17.05	15.42 – 18.06	449 – 582	11.80	+5.25	575 – 694
Llanidloes	8.29	-	740	14.44	- 6.15	544 – 574
Machynlleth	19.27	-	408	20.33	- 1.06	226 – 556
Newtown	18.13	5.37 – 30.50	195 – 813	11.72	+ 6.41	525 – 733
Presteigne	11.05	-	655	n/a	n/a	n/a

Town	Mean IMD score for town wards	Range of IMD scores for town wards	(Range of) Rank in IMD for Wales	Mean IMD score for adjacent rural wards	Difference between town mean & rural mean	Range of ranks in IMD for Wales of adjacent rural wards
Rhayader	14.30	-	562	n/a	n/a	n/a
Welshpool	17.13	12.49 – 23.95	303-623	10.71	+6.42	550 – 781
Aberaeron	13.43	-	586	19.80	- 6.37	366 – 444
Aberystwyth	13.37	4.67 – 29.96	201 – 828	10.61	+2.76	629 – 741
Cardigan	26.11	-	258	18.34	+7.77	354 – 514
Lampeter	7.75	-	757	19.75	- 12.00	294 – 495
Fishguard	22.05	17.82 – 26.23	257 - 454	16.92	+5.13	437 – 524
Haverfordwest	20.19	9.28 – 29.31	210 – 701	12.73	+ 7.46	372 – 815
Milford Haven	26.66	23.92 – 28.64	223 – 305	21.53	+ 5.13	165 – 538
Pembroke	36.64	12.13 – 64.14	14 – 632	28.62	+ 8.02	526 – 595
Pembroke Dock	33.18	27.13 – 43.20	76 – 244	24.64	+ 8.54	165 – 731
Tenby	18.10	-	448	11.74	+ 6.36	642
Carmarthen	11.43	8.28 – 15.07	539 – 734	14.83	- 3.40	229 – 719
Llandeilo	17.22	-	479	17.32	-0.10	347 – 572
Llandovery	18.74	-	424	n/a	n/a	n/a
Newcastle Emlyn	n/a	n/a	n/a	n/a	n/a	n/a
Abergavenny	14.90	6.60 – 24.27	295 – 784	11.34	+ 3.56	577 – 677
Caldicot	8.45	3.90 – 16.23	504 – 840	6.48	+ 1.97	761 – 804
Chepstow[1]	7.09	2.09 – 14.31	561 – 859	6.65	+ 0.44	761 – 804
Monmouth	10.87	5.60 – 14.51	553 – 809	8.79	+ 2.08	634 - 789

1. Figures for adjacent wards do not include wards in England.

Note: The Index of Multiple Deprivation was calculated for 1991 wards. Comparison with adjacent rural wards is not possible for some towns due to ward changes, the extended territories covered by wards containing towns, or location on the English/Welsh border. Wards are ranked from 1 to 865 for Wales as a whole. Source: National Assembly for Wales (2000) *Wales Index of Multiple Deprivation*.

APPENDIX E: COMPANIES IN THE TOP 300 IN WALES BY TURNOVER BASED IN SMALL TOWNS 2005

Town	Company	Location	Ranking	Turnover (£000s)[1]	Total number of employees[2]	Industry	Parent Company
Llangefni	Glanbia Cheese Ltd	Town	49	99,118	373	Food processing	Marnhull Ltd
Llangefni	Cymru Country Chickens Ltd	Town	80	58,828	542	Food processing	Hbos Plc
Llangefni	Cig Mon Group Ltd	Town	93	54,261	142	Food processing	-
Llangefni	Faun Municipal Vehicles Ltd	Town	265	19,055	143	Engineering	Faun Umwelttechnik
Abergavenny	Alun Griffiths (Contractors)	Town	120	41,552	448	Construction	Mainunit Ltd
Abergavenny	Robert Price & Sons Ltd	Town	140	32,780	258	Construction	-
Abergavenny	Northern Automotive Ltd	Hinterland (Gilwern)	197	25,816	532	Automotive	Northern Engraving Corp
Newtown	Control Techniques Drives Ltd	Town	74	63,739	411	Technology	Emerson Electric Co
Newtown	WR Davies (Motors) Ltd	Town	90	55,414	250	Retail	-
Newtown	Masterplug Ltd	Town	159	29,344	63	Manufacturing	-
Chepstow	Jason Holdings UK Ltd	Town	88	55,656	890	Finance	-
Chepstow	Fairfield-Mabey Ltd	Town	233	22,151	233	Manufacturing	Mabey Holdings
Holyhead	Anglesey Aluminium Metal	Town fringe	33	135,679	558	Metals	Rio Tinto Plc
Holyhead	Eaton Electric Ltd	Town	59	83,634	1,268	Manufacturing	Eaton Corp
Menai Bridge	Pentraeth Holdings Ltd	Town	133	37,599	147	Finance	-
Menai Bridge	S Webb & Son Ltd	Town	297	16,333	188	Distribution	-
Newcastle Emlyn	Dansco Dairy Products Ltd	Town	128	39,456	142	Food processing	Solarus Group Ltd
Newcastle Emlyn	Cawdor Cars Ltd	Town	253	20,246	94	Retail	-
Pwllheli	South Caernarfon Creameries Ltd	Hinterland (Y Ffôr)	163	30,579	178	Food processing	-
Pwllheli	Carl Kammerling International Ltd	Town	236	21,736	119	Engineering	Carl Kammerling International

St Asaph	TRB Ltd	Hinterland (Business Pk)	105	48,308	200	Automotive	Tokai Rika Co Ltd
St Asaph	Thales Optics Ltd	Town fringe	123	40,700	480	Manufacturing	Thales SA
Aberystwyth	Institute of Grassland & Environmental Research	Hinterland (Penrhyncoch)	281	17,545	346	Scientific Research	-
Bangor	Watkin Jones & Son Ltd	Town	76	62,448	237	Construction	Towerloom Ltd
Bethesda	Alfred McAlpine Slate Ltd	Town fringe	219	23,373	379	Quarrying	Alfred McAlpine
Brecon	Farmers First plc	Town	181	28,645	54	Agricultural services	-
Caldicot	Mitel Networks Ltd	Town fringe	58	83,918	618	Technology	Mitel Networks Corp
Carmarthen	Castell Howell Foods Ltd	Town	147	32,733	238	Food processing	-
Corwen	Ifor Williams Trailers Ltd	Town	72	65,699	508	Retail	Linguaphone Group Holdings
Haverfordwest	Greens Motors Ltd	Town	208	24,374	103	Retail	-
Kidwelly	Gravells Ltd	Town	169	29,633	72	Retail	-
Lampeter	Organic Farm Foods Ltd	Town	160	30,836	212	Food processing	-
Llanberis	Euro DPC Ltd	Town fringe	102	48,979	351	Manufacturing	Diagnostic Products Corp
Llandrindod Wells	Setten Holdings Ltd	Town	263	19,172	304	Retail	-
Llanfair Caereinion	Amcare Ltd	Town	292	16,790	57	Healthcare	Bristol-Myers Squibb Holdings
Llanidloes	Hamer International Ltd	Hinterland (Dolwen)	177	28,822	118	Food processing	Randall Parker Food Group Ltd
Porthmadog	Bryncir Products Ltd	Town	252	20,345	143	Business Services	-
Ruthin	Jones Brothers Ruthin Co Ltd	Town fringe	246	20,663	199	Engineering	-

Notes: 1. Turnover is for most recent period reported (usually 2003-4); 2. Not all employees are necessarily employed at this location.
Source: Western Mail (2005) *Wales Top 300*, December 2005.

APPENDIX F: KEY EMPLOYMENT STATISTICS FOR SELECTED SMALL TOWNS 2001

Town	Workplace population (Jobs)	Working population	Ratio Jobs to Working Population	% of all jobs within approx 10km radius	% of all jobs within travel to work area	Travel to work area
Llangefni	3763	1652	2.28	39%	31%	Llangefni and Amlwch
Holyhead	4582	4076	1.12	60%	65%	Holyhead
Bala	1001	839	1.19	58%	11%	Ruthin and Bala
Bangor	12787	5642	2.28	58%	36%	Bangor & Caernarfon
Blaenau Ffestiniog	939	1357	0.69	30%	13%	Portmadog & Ffestiniog
Caernarfon	6054	3530	1.72	63%	17%	Bangor & Caernarfon
Dolgellau	1622	978	1.66	74%	41%	Dolgellau & Barmouth
Porthmadog	1864	1211	1.54	38%	27%	Portmadog & Ffestiniog
Pwllheli	2273	1529	1.49	46%	38%	Pwllheli
Llanrwst	1080	1259	0.86	30%	3%	Colwyn & Conwy
Denbigh	3451	3715	0.93	37%	9%	Rhyl and Denbigh
Llangollen	1073	1155	0.93	12%	2%	Wrexham
Ruthin	3062	2282	1.34	48%	34%	Ruthin and Bala
St Asaph	2296	1548	1.48	8%	6%	Rhyl and Denbigh
Brecon	4736	3443	1.38	62%	36%	Brecon
Builth Wells	1118	1170	0.96	24%	11%	Llandrindod Wells
Crickhowell	674	806	0.84	5%	1%	Rhymney & Abergavenny
Hay on Wye	1005	693	1.45	31%	8%	Brecon
Knighton	791	823	0.96	21%	26%	Knighton & Radnor
Llandrindod Wells	3852	2073	1.86	74%	39%	Llandrindod Wells
Llanidloes	1260	1272	0.99	45%	8%	Newtown
Machynlleth	1178	869	1.36	N/a	29%	Machynlleth
Newtown	7770	4726	1.64	74%	52%	Newtown
Presteigne	1012	804	1.26	14%	34%	Knighton & Radnor
Rhayader	543	712	0.76	40%	5%	Llandrindod Wells

Town	Workplace population (Jobs)	Working population	Ratio Jobs to Working Population	% of all jobs within approx 10km radius	% of all jobs within travel to work area	Travel to work area
Welshpool	4338	2460	1.76	69%	36%	Welshpool
Aberaeron	1108	518	2.14	41%	12%	Lampeter
Aberystwyth	10292	6065	1.70	78%	49%	Aberystwyth
Cardigan	2909	1443	2.02	56%	29%	Cardigan
Lampeter	2013	966	2.08	44%	22%	Lampeter
Fishguard	1973	1788	1.10	62%	39%	Fishguard & St Davids
Haverfordwest	9825	5586	1.76	75%	38%	Haverfordwest
Milford Haven	3553	4775	0.74	31%	14%	Haverfordwest
Pembroke	1662	2367	0.70	16%	11%	Pembroke & Tenby
Pembroke Dock	4490	3069	1.46	34%	30%	Pembroke & Tenby
Tenby	2348	1903	1.23	44%	16%	Pembroke & Tenby
Carmarthen	13295	5951	2.23	81%	51%	Carmarthen
Llandeilo	1164	960	1.21	29%	23%	Llandeilo
Llandovery	1013	839	1.21	44%	20%	Llandeilo
Newcastle Emlyn	991	648	1.53	32%	10%	Cardigan
Abergavenny	7298	5655	1.29	68%	11%	Rhymney & Abergavenny
Caldicot	3710	5252	0.71	24%	4%	Newport
Chepstow	7176	6576	1.09	55%	7%	Newport
Monmouth	4008	3520	1.14	37%	8%	Cwmbran & Monmouth

Source: Census 2001.
Workplace population: All people aged between 16 and 74 whose regular place of employment is in the area
Working population: All people aged between 16 and 74 resident in the area and in employment
Percentage of all jobs within approximate 10km radius: Jobs in town area as percentage of all jobs in wards falling wholly or largely within a 10 kilometre radius of the town.
Travel to Work Area (TTWA): As defined in 1998 by the Office of National Statistics based on 1991 wards. Totals of jobs for TTWAs taken from ONS annual estimates of job densities, which are rounded to the nearest thousand.

APPENDIX G: KEY STATISTICS ON COMMUTING TO WORK 2001

Town	Commuters in	Commuters out	Net commuters in/out (+/-)	Ratio commuters in: commuters out	% of workforce travelling 2km to 30km to work	% of workforce travelling over 30km to work	% of working population travelling less than 2km to work
Llangefni*	2810	730	+2080	3.84	71%	4%	53%
Holyhead	2170	1620	+550	1.34	38%	10%	59%
Bala	445	300	+145	1.49	33%	11%	64%
Bangor	9590	2500	+7090	3.84	67%	8%	55%
Blaenau Ffestiniog*	335	655	-320	0.51	29%	6%	51%
Caernarfon	4060	1560	+2500	2.89	58%	9%	55%
Dolgellau	945	300	+645	3.16	51%	7%	69%
Porthmadog*	1125	520	+605	2.16	53%	7%	56%
Pwllheli	1315	580	+735	2.27	50%	8%	61%
Llanrwst	450	630	-180	0.72	39%	2%	50%
Denbigh	1800	2000	-200	0.90	47%	5%	54%
Llangollen	555	600	-45	0.93	45%	7%	47%
Ruthin	1775	1030	+745	1.72	52%	6%	55%
St Asaph	1770	1000	+770	1.77	71%	6%	35%
Brecon	2365	1065	+1300	2.22	40%	10%	69%
Builth Wells	480	540	-60	0.89	37%	7%	54%
Crickhowell*	330	475	-145	0.70	44%	5%	41%
Hay on Wye	525	250	+275	2.10	43%	9%	63%
Knighton	270	320	-50	0.84	29%	5%	61%
Llandrindod Wells	2250	470	+1780	4.77	45%	14%	77%
Llanidloes	515	525	-10	0.98	35%	6%	58%
Machynlleth	615	315	+300	1.93	43%	9%	64%

Town	Commuters in	Commuters out	Net commuters in/out (+/-)	Ratio commuters in: commuters out	% of workforce travelling 2km to 30km to work	% of workforce travelling over 30km to work	% of working population travelling less than 2km to work
Newtown	4550	1590	+2960	2.86	49%	10%	62%
Presteigne	510	310	+200	1.63	42%	9%	61%
Rhayader	155	320	-165	0.49	22%	7%	55%
Welshpool	2670	800	+1870	3.34	53%	8%	67%
Aberaeron*	805	250	+555	3.22	65%	8%	52%
Aberystwyth	6245	1910	+4335	3.27	50%	10%	68%
Cardigan	1855	485	+1370	3.81	52%	11%	66%
Lampeter	1320	345	+975	3.84	55%	11%	64%
Fishguard	830	560	+270	1.48	34%	8%	61%
Haverfordwest	6445	2205	+4240	2.93	61%	4%	60%
Milford Haven	1410	2605	-1195	0.54	36%	4%	45%
Pembroke	740	1450	-710	0.51	41%	3%	38%
Pembroke Dock	2695	1325	+1370	2.03	54%	6%	56%
Tenby	1120	665	+455	1.68	44%	4%	64%
Carmarthen	9615	2220	+7395	4.33	61%	11%	62%
Llandeilo	715	500	+215	1.43	55%	6%	48%
Llandovery	465	290	+175	1.59	38%	8%	59%
Newcastle Emlyn	640	310	+330	2.08	57%	7%	52%
Abergavenny	4475	2660	+1815	1.68	53%	8%	52%
Caldicot	1795	3305	-1510	0.54	39%	9%	37%
Chepstow	4135	3600	+535	1.15	48%	10%	45%
Monmouth	2030	1500	+530	1.35	42%	8%	57%

Source: Census 2001. Figures rounded to nearest 5.
Commuters in: all people whose normal place of work is in the town travelling more than 2km to work.
Commuters out: all people normally resident in the town travelling more than 2km to their place of work

NB: Ouput level census data indicates distance travelled to work but not travel in/out of the area or direction of travel. In this calculation it is presumed that those individuals travelling less than 2km to work (including those working at home) give an approximation of the number of people both living and working in the town. This approximation works less well for some towns. The validity of the approximation can be tested by comparing the number of people living within the town travelling less than 2km to work with the number of people working in the town travelling less than 2km to work. Towns where the difference between these figures is greater than 10% have been indicated with an asterisk.

APPENDIX H: KEY STATISTICS ON SERVICE PROVISION IN SMALL TOWNS
Commercial Services

Town	Food only shops	Non-food shops	General stores	Main Post Office	Banks (f/t)	Banks (p/t)	Building Societies	Major supermarket	Smaller supermarket	Distance to nearest Major supermarket
Llangefni	1	>10	>10	Yes	6	0	1	-	Kwiksave Lidl Co-op	8 miles (Bangor)
Holyhead	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Tesco	Kwiksave Lidl	-
Bala	4	>10	4	No	3	0	1	-	Somerfield	20 miles (Denbigh)
Bangor	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Tesco Morrisons	Kwiksave Lidl	-
Blaenau Ffestiniog	n/a	n/a	n/a	Yes	0	2	1	-	Somerfield Co-op	12 miles (P'madog)
Caernarfon	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Tesco Morrisons	Kwiksave	-
Dolgellau	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	Somerfield Co-op	25 miles (P'madog)
Porthmadog	>10	>10	>10	Yes	3	0	3	Tesco	Kwiksave Lidl	-
Pwllheli	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	Kwiksave Co-op	14 miles (P'madog)
Llanrwst	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	Kwiksave	11 miles (Colwyn B)
Denbigh	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Morrisons	Kwiksave Lidl	-
Llangollen	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	Somerfield	15 miles (Wrexham)

Town	Food only shops	Non-food shops	General stores	Main Post Office	Banks (f/t)	Banks (p/t)	Building Societies	Major supermarket	Smaller supermarket	Distance to nearest Major supermarket
Ruthin	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	Co-op	6 miles (Mold)
St Asaph	3	11	3	No	0	2	1	-	Kwiksave	4 miles (Rhyl)
Brecon	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Morrisons	Somerfield Co-op	-
Builth Wells	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	-	14 miles (Brecon)
Crickhowell	4	>10	4	No	2	0	1	-	-	5 miles (Abergvny)
Hay on Wye	>10	>10	>10	No	3	0	0	-	Co-op	14 miles (Brecon)
Knighton	1	>10	3	No	2	0	1	-	-	15 miles (Leominster)
Llandrindod Wells	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	Somerfield Kwiksave	19 miles (Newtown)
Llanidloes	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	Somerfield	11 miles (Newtown)
Machynlleth	>10	>10	2	No	3	0	2	-	Co-op	16 miles (Aberystwyth)
Newtown	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Morrisons	Somerfield Co-op	-
Presteigne	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	-	11 miles (Leominster)
Rhayader	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	-	17 miles (Newtown)
Welshpool	>10	>10	4	No	4	0	2	Morrisons	Somerfield Kwiksave	-

Town	Food only shops	Non-food shops	General stores	Main Post Office	Banks (f/t)	Banks (p/t)	Building Societies	Major supermarket	Smaller supermarket	Distance to nearest Major supermarket
Aberaeron	5	>10	2	No	3	0	0	-	-	14 miles (Aberystwyth)
Aberystwyth	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Morrisons	Somerfield Kwiksave Lidl Co-op	-
Cardigan	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Tesco	Somerfield Kwiksave	-
Lampeter	>10	>10	>10	Yes	4	0	4	-	Somerfield Co-op	20 miles (Aberystwyth)
Fishguard	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	Kwiksave	13 miles (H'west)
Haverfordwest	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Tesco Morrisons	Kwiksave Lidl	-
Milford Haven	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Tesco	Somerfield Kwiksave Lidl	
Pembroke	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	Somerfield	1 mile (Pembroke D)
Pembroke Dock	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Asda	Kwiksave Lidl	-
Tenby	>10	>10	3	No	4	0	3	-	Somerfield	9 miles (Pembroke D)
Carmarthen	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Tesco Morrisons	Kwiksave Lidl	-
Llandeilo	5	>10	3	No	4	0	3	-	Co-op	9 miles (Ammanford)
Llandovery	4	>10	10	No	4	0	0	-	Somerfield	18 miles (Brecon)

Town	Food only shops	Non-food shops	General stores	Main Post Office	Banks (f/t)	Banks (p/t)	Building Societies	Major supermarket	Smaller supermarket	Distance to nearest Major supermarket
Newcastle Emlyn	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	Somerfield	11 miles (Cardigan)
Abergavenny	>10	>10	n/a	Yes	4	0	5	Waitrose	Tesco Met	-
Caldicot	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-	Somerfield	6 miles (Chepstow)
Chepstow	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Tesco	Somerfield Lidl	-
Monmouth	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Waitrose	Somerfield	-

Food and non-food shops, general stores, post offices, banks, building societies: Information from WRO Services Survey 2004.
Supermarkets: Information from stores' web-sites (February 2006)
Major supermarkets: Asda, Morrisons, Sainsbury's, Tesco, Waitrose
Smaller supermarkets: Co-op, Kwiksave, Lidl, Somerfield, Tesco Metro
Distances to nearest major supermarket are taken from stores' website store finders.

APPENDIX I: KEY PUBLIC SERVICES IN SELECTED TOWNS 2006

	Hospital with A&E	Hospital without A&E	Police Division HQ	Police Station	FE College	Secondary School	Court (Type)	Job Centre
Llangefni	No	Yes	No	Yes	Yes	Yes	County, Magistrates	Yes
Holyhead	No	Yes	No	Yes	Outreach centre	Yes	Magistrates	Yes
Bala	No	No	No	No	No	Yes	None	No
Bangor	Yes	Yes	No	Yes	Yes	Yes (x2)	Magistrates	Yes
Blaenau Ffestiniog	No	Yes	No	No	No	Yes	None	Yes
Caernarfon	No	Yes	Yes	Yes	Yes	Yes	Crown, County, Magistrates	Yes
Dolgellau	No	Yes	No	Yes	Yes	Yes	Crown, Magistrates	Yes
Porthmadog	No	No	No	Yes	No	Yes	None	Yes
Pwllheli	No	Yes	No	Yes	Yes	Yes (x2)	Magistrates	Yes
Llanrwst	No	No	No	No	No	Yes	None	Yes
Denbigh	No	Yes	No	Yes	No	Yes (x2)	Magistrates	Yes
Llangollen	No	Yes	No	No	No	Yes	None	Yes
Ruthin	No	Yes	No	Yes	Yes	Yes	None	No
St Asaph	No	Yes	Yes	Yes	No	Yes	None	No
Brecon	No	Yes	Yes	Yes	Yes	Yes	County, Magistrates	Yes
Builth Wells	No	Yes	No	Yes	No	Yes	None	No
Crickhowell	No	No	No	Yes	No	Yes	None	No
Hay on Wye	No	No	No	Yes	No	No	None	No
Knighton	No	Yes	No	Yes	No	No	None	No
Llandrindod Wells	No	Yes	No	Yes	Yes	Yes	Magistrates	Yes
Llanidloes	No	Yes	No	Yes	No	Yes	None	No

	Hospital with A&E	Hospital without A&E	Police Division HQ	Police Station	FE College	Secondary School	Court (Type)	Job Centre
Machynlleth	No	Yes	No	Yes	No	Yes	None	Yes
Newtown	No	Yes	No	Yes	Yes	Yes	Magistrates	Yes
Presteigne	No	No	No	Yes	No	Yes	None	No
Rhayader	No	No	No	Yes	No	No	None	No
Welshpool	No	Yes	No	Yes	No	Yes	Crown, County, Magistrates	Yes
Aberaeron	No	Yes	No	Yes	No	Yes	Magistrates	No
Aberystwyth	Yes	Yes	Yes	Yes	Yes	Yes (x2)	County	Yes
Cardigan	No	Yes	No	Yes	Yes	Yes	None	Yes
Lampeter	No	No	No	Yes	No	Yes	None	Yes
Fishguard	No	No	No	Yes	No	Yes	None	Yes
Haverfordwest	Yes	Yes	Yes	Yes	Yes	Yes (x3)	County, Magistrates	Yes
Milford Haven	No	No	No	Yes	Yes	Yes	None	Yes
Pembroke	No	No	No	No	No	Yes	None	No
Pembroke Dock	No	Yes	No	Yes	No	No	None	Yes
Tenby	No	Yes	No	Yes	No	Yes	None	Yes
Carmarthen	Yes	Yes	Yes	Yes	Yes	Yes (x3)	County, Magistrates	Yes
Llandeilo	No	No	No	Yes	Agricultural campus	Yes	None	Yes
Llandovery	No	Yes	No	Yes	No	Yes	None	No
Newcastle Emlyn	No	No	No	Yes	No	Yes	None	No
Abergavenny	Yes	Yes	No	Yes	No	Yes	Magistrates	Yes
Caldicot	No	No	No	Yes	No	Yes	None	Yes
Chepstow	No	Yes	No	Yes	No	Yes	Magistrates	Yes
Monmouth	No	No	No	Yes	No	Yes	None	Yes

APPENDIX J: JOBSEEKERS ALLOWANCE CLAIMAINTS IN SELECTED SMALL TOWNS, 1998, 2000 AND 2003

	Income-based claimants			Change			
	1998	2000	2003	1998-2000	2000-2003	1998-2003	98-03 %
Llangefni	120	105	95	-15	-10	-25	-21%
Holyhead	445	370	285	-75	-85	-160	-46%
Bala	25	20	25	-5	+5	=	=
Bangor	580	485	325	-95	-160	-255	-44%
Blaenau Ffestiniog	180	145	75	-35	-70	-105	-58%
Caernarfon	380	265	215	-115	-50	-165	-43%
Dolgellau	75	40	30	-35	-10	-45	-57%
Porthmadog	35	20	20	-15	=	-15	-43%
Pwllheli	75	45	35	-30	-10	-40	-53%
Llanrwst	75	50	25	-25	-25	-50	-67%
Denbigh	110	85	60	-25	-25	-50	-45%
Llangollen	70	50	40	-20	-10	-30	-43%
Ruthin	40	35	20	-5	-15	-20	-50%
St Asaph	20	15	10	-5	-5	-10	-50%
Brecon	110	90	60	-20	-30	-50	-45%
Builth Wells	35	35	20	=	-15	-15	-43%
Crickhowell	40	25	25	-15	=	-15	-47%
Hay on Wye	25	10	10	-15	=	-15	-60%
Knighton	40	35	25	-5	-10	-15	-47%
Llandrindod Wells	110	125	100	+15	-25	-10	-10%
Llanidloes	10	10	5	=	-5	-5	-50%
Machynlleth	45	45	20	=	-25	-25	-55%
Newtown	100	105	85	+5	-20	-15	-15%
Presteigne	15	10	20	-5	+10	+5	+25%
Rhayader	30	15	15	-15	=	-15	-50%

	Income-based claimants			Change			
	1998	2000	2003	1998-2000	2000-2003	1998-2003	98-03 %
Welshpool	65	60	45	-5	-15	-20	-31%
Aberaeron	20	20	10	=	-10	-10	-50%
Aberystwyth	320	250	155	-70	-95	-165	-52%
Cardigan	95	105	65	+10	-40	-30	-32%
Lampeter	45	35	25	-10	-10	-20	-44%
Fishguard	85	75	55	-10	-20	-30	-35%
Haverfordwest	355	285	195	-70	-90	-160	-45%
Milford Haven	495	410	255	-85	-155	-240	-48%
Pembroke	210	210	100	=	-110	-110	-52%
Pembroke Dock	285	280	145	-5	-135	-140	-49%
Tenby	100	65	35	-35	-30	-65	-65%
Carmarthen	215	215	155	=	-60	-60	-28%
Llandeilo	30	25	35	-5	+10	+5	+17%
Llandovery	35	25	15	-10	-10	-20	-57%
Abergavenny	335	265	160	-70	-105	-175	-52%
Caldicot	150	105	60	-45	-45	-90	-60%
Chepstow	140	95	35	-45	-60	-105	-75%
Monmouth	125	60	65	-65	+5	-60	-48%

Note: Figures are rounded to 5 at the ward level. Town areas based on wards as described in appendix A. Comparable figures not available for 2004 and 2005. Source: Office of National Statistics, Neighbourhood Statistics.

APPENDIX K: SIGNIFICANT JOB CREATIONS AND JOB LOSSES FOR SELECTED TOWNS, 2000-2005.

	Job Creations				**Job Losses**			
	Year	Company / Development	No of jobs	Sector / function	Year	Company	No of jobs	Sector / function
Llangefni	2005	Asda	120	Retail	2003	Faun Munic. Vehicles	30	Manufacturing
	2003	Marco Cable Systems	40	Engineering	2003	Eastman Peboc	35	Manufacturing
	2003	Food technology centre	75	Food proc.				
Holyhead	2004	Stena Line	60	Call centre				
	2004	Quotations	40	IT				
	2002	Stena Line	55	Transport				
Bangor	2005	Dept Work & Pensions	250	Call centre				
	2004	DeepStream Technologies	120	Technology				
	2002	The Book People	180	Distribution				
	2000	Cycle Citi	160	Manufacturing				
Porthmadog	2002	Cymad	70	Call centre				
Pwllheli	2005	Asda	120	Retail				
Corwen	2001	Wholebake Foods	10	Food proc.	2001	Meridian Foods	100	Food proc.
Bodelwyddan					2002	Hotpoint	140	Manufacturing
St Asaph	2005	Greenthumb	12	Head office				
	2005	Freeway Healthcare	70	Head office				
	2004	Tweedmill retail centre	50	Retail				
	2000	Optokem	20	Optronics				
Newtown	2001	Laura Ashley/Texplan[1]	120	Manufacturing	2005	Elliotts	70	Manufacturing
	2000	A&J Enterprises	125	Manufacturing	2005	Trelleborg Bonded Seals	70	Manufacturing
					2004	Elliotts	70	Manufacturing
					2004	Trelleborg Bonded Seals	40	Manufacturing
					2004	Laura Ashley/Texplan[2]	90	Manufacturing
					2000	Big T teabags	65	Manufacturing

Knighton	2002	Industrial Plastics Recyclers	10	Manufacturing				
Machynlleth	2003	MrOffice.com	32	Distribution	2005	Celtica	14	Tourism
Rhayader	2003	Maxsport Competition Tyres	25	Manufacturing				
Aberystwyth	2005	Welsh Assembly Govt	500	Public Admin	2005	British Telecom	40	Call centre
		Rachel's Organic	50	Food proc.				
Milford Haven					2001	Crownridge Steel	12	Manufacturing
Pembroke Dock	2003	Friday-Ad	120	Call centre	2003	DPS	45	Manufacturing
	2003	Dept Work & Pensions	250	Call centre		7C	223	Call centre
Carmarthen	2004	Retail development	300	Retail				
	2004	Dyfed-Powys Police	50	Call centre				
Chepstow					2005	Asda	223	Distribution

1 & 2: Figures refer to all Laura Ashley/Texplan factories in Powys

Source: UK Business Park, UK Activity Report (www.ukbusinesspark.co.uk)

APPENDIX L: FUNDING FOR PROJECTS IN SELECTED TOWNS FROM EU STRUCTURAL FUNDS AND COMMUNITY FUND

	No. of ERDF approved grants	Value of ERDF approved grants	Value per resident of ERDF grants	% of total value of ERDF grants to county	No. of Community Fund grants	Value of Community Fund grants	Value per resident of CF grants	% of total value of CF grants to county
Llangefni	4	£2,442,431	£523.90	12%	3	£8,100	£1.73	<1%
Holyhead	5	£9,567,864	£851.46	47%	8	£175,616	£15.63	4%
Bala	1	£461,366[1]	n/a	1%	6	£13,592	£6.86	<1%
Bangor	5	£19,354,434	£1199.90	41%	24	£1,070,257	£66.35	11%
Blaenau Ffestiniog	3	£1,019,845	£345.71	2%	10	£299,099	£101.39	3%
Caernarfon[2]	4	£1,834,447	£190.87	4%	18	£510,910	£53.16	5%
Dolgellau	0	0	0	0	0	0	0	0%
Porthmadog[2]	0	0	0	0	4	£11,599	£3.29	<1%
Pwllheli	2	£1,203,000	£309.97	3%	6	£296,921	£77.30	3%
Llanrwst	1	£766,791	£262.36	4%	6	£134,598	£44.32	2%
Denbigh	3	£1,041,962	£104.36	4%	16	£969,539	£101.75	10%
Llangollen[3]	2	£870,993	£224.25	4%	4	£15,173	£3.91	<1%
Ruthin [3,4]	1	£266,466	£51.07	1%	13	£73,958	£14.17	1%
St Asaph	2	£8,376,382	£2399.42	36%	8	£25,078	£7.18	<1%
Brecon[5]	2	£176,649	£22.36	2%	26	£815,964	£103.27	6%
Builth Wells	0	0	0	0	9	£29,806	£12.67	<1%
Crickhowell	1	£480,800	£173.76	5%	2	£1,659	£0.60	<1%
Hay on Wye	0	0	0	0	2	£2,470	£1.68	<1%
Knighton	0	0	0	0	8	£385,513	£126.69	3%
Llandrindod Wells[6]	0	0	0	0	17	£633,811	£126.16	5%
Llanidloes	1	£27,139[7]	n/a	<1%	15	£305,478	£108.83	2%
Machynlleth[6]	1	£43,500	£26.26	<1%	11	£652,500	£303.91	5%
Newtown[6]	0	0	0	0	33	£1,445,375	£134.04	11%
Presteigne	0	0	0	0	6	£35,695	£14.50	<1%
Rhayader	1	£92,925	£44.78	1%	8	£295,315	£142.32	2%

	No. of ERDF approved grants	Value of ERDF approved grants	Value per resident of ERDF grants	% of total value of ERDF grants to county	No. of Community Fund grants	Value of Community Fund grants	Value per resident of CF grants	% of total value of CF grants to county
Welshpool[6]	0	0	0	0	12	£229,732	£36.65	2%
Aberaeron	0	0	0	0	4	£277,344	£182.46	4%
Aberystwyth	7	£4,443,004	£262.46	20%	21	£1,270,297	£75.04	18%
Cardigan	6	£4,591,128	£1092.34	20%	19	£540,488	£128.60	8%
Lampeter	1	£219,603	£75.88	1%	6	£60,610	£20.94	1%
Fishguard	1	£155,956	£30.91	1%	11	£137,576	£27.27	3%
Haverfordwest	3	£916,862	£70.58	4%	20	£450,344	£34.67	9%
Milford Haven	5	£6,794,303	£519.20	26%	16	£303,090	£23.16	6%
Pembroke	2	£271,107	£37.80	1%	12	£409,302	£56.74	8%
Pembroke Dock	11	£7,434,480	£856.90	29%	11	£196,840	£22.69	4%
Tenby	1	£165,113	£33.46	1%	6	£261,279	£52.95	5%
Carmarthen	5	£2,287,109	£148.40	7%	31	£698,756	£45.34	6%
Llandeilo	0	0	0	0	11	£33,184	£11.30	<1%
Llandovery	1	£470,839	£164.06	1%	10	£101,292	£35.29	1%
Newcastle Emlyn	0	0	0	0	7	£18,803	£4.93	<1%
Abergavenny	4	£483,347	£31.68	22%	23	£166,416[8]	£10.91	5%
Caldicot	0	0	0	0	15	£114,504[8]	£9.71	3%
Chepstow	2	£919,606	£84.98	42%	14	£222,880	£20.60	6%
Monmouth	0	0	0	0	18	£430,413	£48.49	12%

1. Funding split between Bala and Tywyn.
2. Does not include grant of £3,728,735 for restoration of Caernarfon-Porthmadog railway
3. Does not include grant of £84,000 for joint regeneration initiative for Ruthin and Llangollen (RALLY).
4. Does not include grant of £699,040 for industrial site development in Rhyl and Ruthin.
5. Does not include grant of £52,340 for manufacturing industries network in Brecon and Ystradgynlais
6. Does not include grant of £160,265 for manufacturing industries network in Newtown, Llandrindod Wells, Machynlleth and Welshpool.
7. Funding split between Llanidloes and Llanwrtwyd Wells
8. Does not include grant of £89,714 made jointly to Advocacy Action Wales groups in Abergavenny and Caldicot

APPENDIX M: INDICATIVE CHARACTERISTICS OF TYPES OF SMALL TOWN

Type	Examples	Population	Employment	Social & Economic Development	Public Services	Commercial Services	Trends	Challenges
Sub-Regional Centre	Aberystwyth, Bangor, Carmarthen, Haverfordwest	>10,000. Varying rates of growth. Average age generally <40	Strong employment base. High ratio of jobs to population. Significant commuting in.	Significant investment, but higher levels of EU funding in some towns than others	Higher-order public service centres, including hospitals, FE colleges & county courts	Retail centres for sub-region including some comparison goods.	Continuing growth. Expansion of employment & retail bases. Some rationalisation of high-order public services.	Competition from larger retail centres, including out-of- town shopping centres. Rationalisation of some public sector facilities, e.g. hospitals. Pressure of population growth on house prices.
Anchor Towns	Llandrindod Wells, Brecon, Llangefni, Newtown, Caernarfon, Cardigan, Abergavenny	Generally 4,000 – 10,000. Stable or fluctuating population in most cases. Average age in line with county.	Significant employment centres. Commuting in exceeds commuting out. Often significant public sector employment.	High levels of support from ERDF and Community Fund, often for projects benefiting wider area.	Middle-order public service centres, including community hospitals, secondary schools, police stations, magistrates' courts.	Local centres for convenience goods shopping. Some lower-order national chains. Supermarket.	Stable. Opportunities for growth tend to be episodic due to size of towns. Some towns have significant recent economic and residential development, others less so.	Competition from larger centres for shopping and employment. Town centres dominated by small, independent stores vulnerable to supermarkets. Rationalisation of some public sector facilities.

Type	Examples	Population	Employment	Social & Economic Development	Public Services	Commercial Services	Trends	Challenges
Island Towns	Llanidloes, Fishguard, Denbigh, Machynlleth, Pembroke Dock	Generally 2,000 – 9,000. Small but steady growth.	Similar number of jobs to working population. Most residents work locally. Employment may be concentrated with dominant sectors/ employers. Population growth may be linked to increased commuting out.	Significant support from EU funds and other sources, in some cases linked to specific regeneration needs concerning economic changes. Strong community spirit helps to successfully bid for funding.	Middle-order public service centres, including secondary schools, police stations and public libraries.	Limited retail base meeting convenience goods needs of town but not significantly serving wider area. Small supermarkets.	Becoming more integrated into the retail and commuting fields of larger centres.	Competition from larger centres for shopping and employment. Vulnerable to closure of major employers. Vulnerable to rationalisation of public services.
Doughnut Towns	St Asaph, Holyhead, Milford Haven, Chepstow.	Varies.	Significant employment base in town's hinterland providing both for town population and commuters from wider afield.	Decline of traditional industries in hinterland may have been addressed by regeneration packages. New investment relative to location.	Generally middle-order facilities, including secondary schools, police stations and public libraries.	Limited town centre provision. May have significant retail outlets on fringe or in hinterland, often attracting trade from a wider area.	Development of town fringe and hinterland locations. Decline of town centre provision.	May be over-reliant on major employers. Town centre provision weakened by out-of-town developments. Lack of integration of in-town and out-of-town employers.

Type	Examples	Population	Employment	Social & Economic Development	Public Services	Commercial Services	Trends	Challenges
Satellite Towns	Caldicot, Crickhowell, Llanrwst, Pembroke, Blaenau Ffestiniog	Significant variation in size from c2,000 to 10,000, and in trend from small decline to small growth.	Fewer jobs than working population. High numbers of commuters out to work.	Decline of traditional employers, some attempts at regeneration but bidding capacity may be limited by weak community cohesion.	Generally lower-order facilities such as GP surgeries Usually a secondary school.	Lower-order retail centre. May have a small supermarket. Most residents will travel for shopping to larger centres.	Opportunities for residential expansion as commuting bases, but limited opportunities for economic growth.	Continuing decline of service base in competition with larger centres. Economic regeneration. Building community cohesion.
Niche Towns	Llandeilo, Hay on Wye, Llangollen, Rhayader, Tenby	Generally 1,000 – 5,000. Usually a growing population.	Similar numbers of jobs to working population. Employment concentrated in specific sectors, often tourism and/or retail, and with smaller employers. Commuting rates vary.	Economic development focused on exploitation of niches (e.g. tourism, book trade, outdoor pursuits, festivals). Strong community based initiatives.	Varies but generally lower and middle order facilities.	Retail base weighted towards niche markets. High level of trade sourced from tourists and visitors. Dominance of independent stores.	Continuing enhancement of niche appeal and associated commercial development.	Maintaining niche appeal over long-term. Promotion to new markets. Competition from larger centres and supermarkets for convenience shopping. Rationalisation of public sector facilities.