



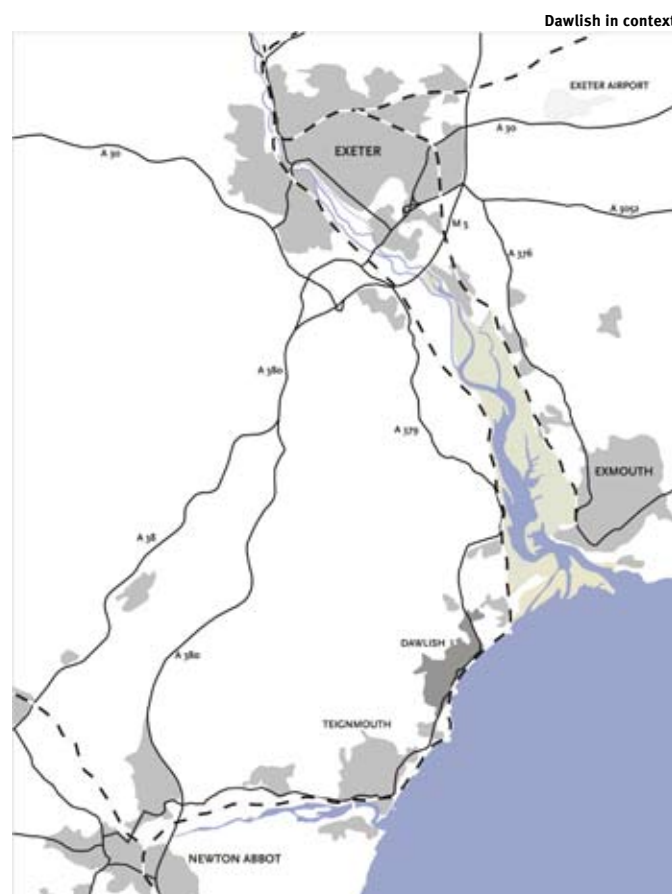
## drivers of change

### 2.1 Challenges for coastal towns

This section of the report describes some of the challenges facing Dawlish. For at least two generations the town has felt the effects of **powerful social and economic forces**, which have had a profound impact on the role and character of the town. These changes are far from unique: they are typical of the experience of hundreds of small towns in England, and of coastal resorts in particular.

Small towns are very popular, especially when – like Dawlish – they are within easy striking distance of a large city. People value the quality of life that small towns offer, and demand for housing is generally high. However, the **role of small towns** has changed radically, especially within city-regions. Places that were once market towns and rural service centres have been **suburbanised**, with much of the net increase in population accounted for by commuters. Despite the demand for small town lifestyles, town centres have faced **severe competitive pressures**. Traditional high streets have been squeezed by the competing attractions of large cities and out of town shopping and leisure centres. Large supermarkets can help to retain retail expenditure in small towns, but often at the expense of small independent stores.

These trends can all be observed in Dawlish, but **coastal towns** also face some additional challenges. A review



of recent research on economic and social conditions in seaside towns is contained in **Annex 1**. The review confirms that, although conditions differ from place to place, coastal towns still experience some common problems.

Seaside towns are generally considered to be **desirable places**, but they are especially attractive to older working age people or retirees. An influx of older migrants may result in an **ageing population**, especially if younger people are forced to move away in search of jobs and/or affordable housing. Usually, migration is driven by economic opportunity but the **motivation** of people moving to seaside towns is different: many move to the coast to retire, or to find low-cost rented housing. In many coastal towns **population has grown faster than employment** resulting in low levels of economic activity, above average and persistent unemployment and low employment aspirations.

The performance of coastal towns reflects the changing nature of the **tourism sector**. Traditional seaside family holidays have, of course, been in long-term decline. Many resorts have struggled to adjust to a changing market: the Consumers Association has criticised them for their “ageing infrastructure, tired ideas and low quality accommodation”. Cities and the countryside have out-performed the seaside as preferred short-break destinations, although Devon and Cornwall have done relatively well.



Tourism is also associated with **low-paid, part-time and seasonal employment**. The research evidence suggests that developing a high quality tourism product that meets the expectations of discerning visitors remains an important priority for coastal towns, but it needs to be complemented by action to **diversify the economy** and increase the number of skilled, well-paid jobs.

Taken together, these and some of the other trends discussed in Annex 1 have placed a strain on **public services**. Elderly populations, with many people separated from family support networks, result in high levels of dependency; a relatively weak local business base means that local authority revenues are reduced; and local government spending formulae do not recognise the costs of providing and maintaining services and amenities for visitors.

## 2.2 Dawlish in context

Much of this analysis applies to Dawlish, although the town has not experienced such acute problems as places like Great Yarmouth, Ilfracombe and Morecambe which have become synonymous with poverty and social exclusion. The effects in Dawlish have been **mitigated** by factors including:

- the town's **proximity to Exeter**, which has enjoyed

Dawlish in context: aerial view



a prolonged economic boom and which provides economic opportunities within easy commuting distance

- the **accessibility of Dawlish** to large centres of population and to road, rail and air networks, and
- the successful transition of Devon to become a popular **short-break destination**, although Dawlish itself is not a significant player in this market.

Nevertheless, a number of statistical indicators confirm that Dawlish reflects some aspects of the “seaside syndrome”. For example:

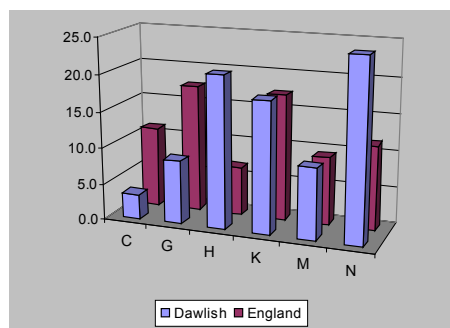
- only 52.5% of the population is of **working age** (Great Britain 61.5%)
- the percentage of the working age population which is **economically active** is slightly below average, and the percentage which is economically inactive because of **illness or disability** is above average
- a high proportion of people are in **part-time employment**
- compared with the national average, fewer people work in **professional** occupations, but a high proportion work in **skilled trades** and personal services<sup>1</sup>.

The results of the 2005 Annual Business Inquiry (ABI)

<sup>1</sup> Based on Official of National Statistics (ONS) ward profiles for Dawlish Central and North East and Dawlish South West

show that there were a total of about 3,900 **employees in employment** in the two Dawlish wards. The returns need to be treated with caution because absolute numbers in some industries are small and may be liable to error. However, the indications are that – compared with the English average – manufacturing and wholesale/retail are significantly under-represented, while hotels/restaurants and health and social work are significantly over-represented (Figure 2-1).

Figure 2-1: Employment in key sectors – Dawlish and England



Key to industry groups: C – manufacturing; G – wholesale and retail trade, repair etc; H – hotels and restaurants; K – real estate, renting and business activities; M – education; N – health and social work.

The local economy is dominated by what are traditionally

low-skill, low-wage sectors. Remarkably, the ABI shows that 58% of local jobs are part-time.

A useful and fine-grained analysis of social characteristics of contemporary Dawlish is contained in the **Mosaic Profile** commissioned by Devon County Council and prepared by Experian (January 2007). Mosaic UK uses data from a number of sources to allocate household to 11 broad groups and 61 specific types.

Figure 2-2 shows the spread of households by group in Dawlish<sup>2</sup>, compared with the UK average.

Figure 2-2: Mosaic groups, Dawlish and UK 2007

Group Description	Dawlish share %	UK share %
A - Symbols of success	0.99	9.62
B - Happy Families	3.21	10.76
C - Suburban comfort	11.36	15.10
D -Ties of community	10.62	16.04
E - Urban intelligence	0.00	7.19
F - Welfare borderline	0.25	6.43
G - Municipal dependency	0.74	6.71
H - Blue collar enterprise	4.94	11.01
I - Twilight subsistence	1.98	3.88
J - Grey perspectives	55.56	7.88
K - Rural isolation	10.37	5.39
<b>Total</b>	<b>100.00</b>	<b>100.00</b>

These groups are based on a basket of measures and characteristics, so Dawlish – a small, stand-alone town with a rural hinterland – will inevitably differ from the UK profile. Nevertheless, Experian reach the startling conclusion that more than half the households in the town are in Group J – Grey Perspectives. The defining characteristics of this group are described as:

*Pensioners, relocated on retirement, own their own homes, index linked pensions, significant capital, active good health, principles/prejudices, prefer face to face service.*

Within this group, the two most prominent household types are J53 (High Spending Elders) and J55 (Small Town Seniors)

Also well represented are Group C – Suburban Comfort and Group D – Ties of Community. Generally, this town profile is associated with traditional values and conservative lifestyles, and by households which are comfortably off but not wealthy. However, the profile also confirms the presence of some pockets of poverty and a minority of people who opt for alternative, quasi-urban lifestyles.

2 Based on the 2 town wards, Dawlish Central and North East and Dawlish South West.



### 2.3 Conclusion

Dawlish is a **popular and attractive town** in an enviable location on the coast and within easy reach of Exeter and other employment centres. Although it is a popular place to visit it is a long time since it was a major resort (unlike Dawlish Warren which is still an important visitor destination). This has helped the town to make a relatively smooth transition to new roles, and to avoid the acute social problems associated with the decline of many seaside towns.

In this post-resort phase Dawlish has been defined by three key trends:

- **in-migration** by older workers and retired people has resulted in an ageing population, low levels of economic activity and pockets of poverty
- the **suburbanisation** of the town as it has become more closely integrated into the economy and labour market of a fast-expanding Exeter city region, and
- a reduction in **local employment** as the town's status as a shopping and local service centre has declined: the local economy is dominated by low-wage, low-skill jobs.

The town is not in a crisis and it remains a sought-after place

to live, but taken together these trends give some **cause for concern**. If they are allowed to continue they may raise questions about the **sustainability** of a community where too many people are dependent and too few are working, which is highly dependent on **commuting** for good quality, well paid jobs, and where people are **forced to travel** to access good quality shopping and leisure facilities.

The focus of this study is on the town centre. The condition and prospects of the study area are discussed in more detail in Section 4.

Dawlish Water and Brunswick Place

