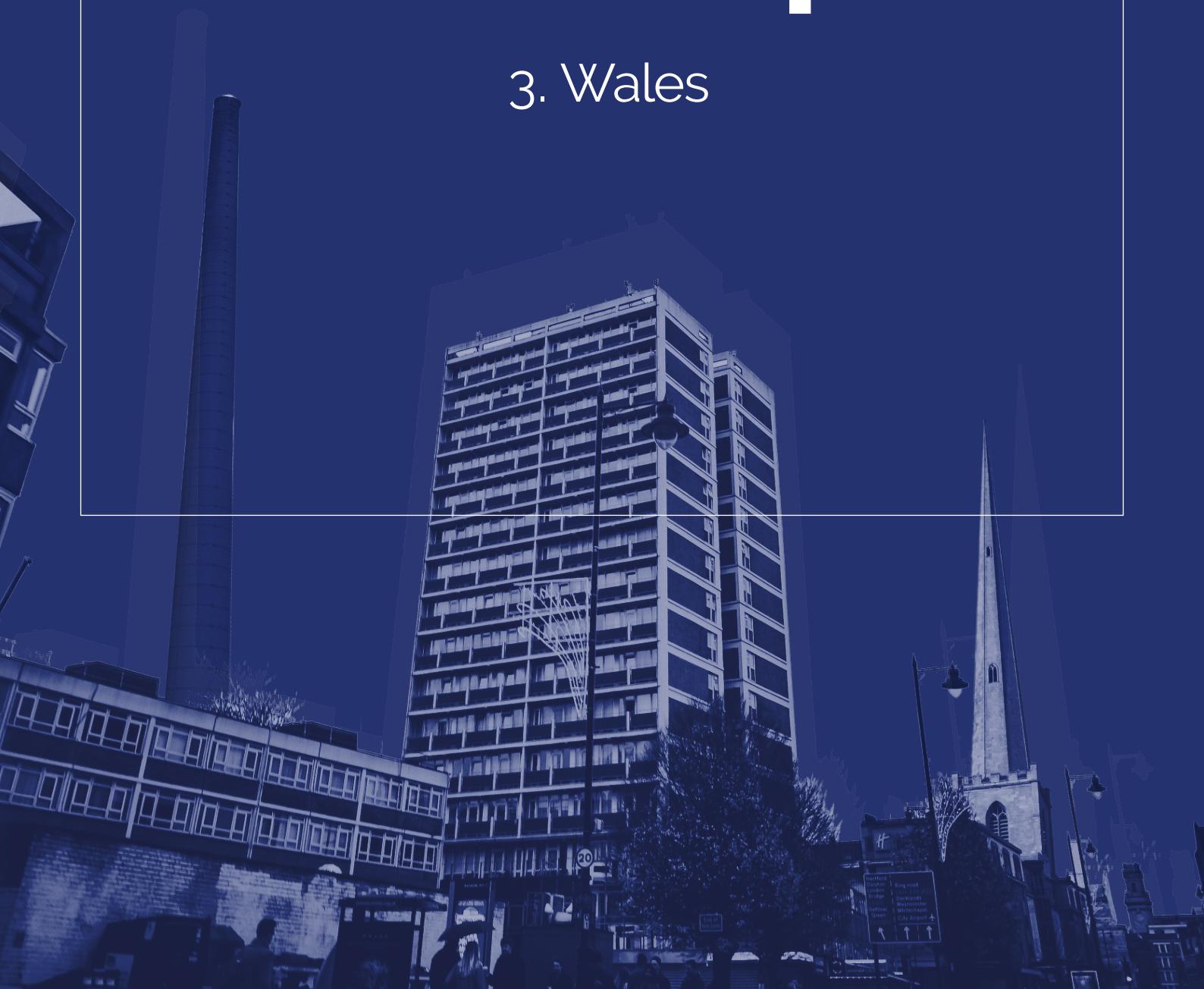**Policy Report Series**

Townscapes

3. Wales

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Contents

Foreword by Michael Kenny

The declining economic fortunes of many towns, and the chasm that divides the experiences and outlooks of many of their inhabitants from the metropolitan centres where wealth and power have become concentrated, are issues of growing interest in political life and public policy.

In the UK, the preponderance of support for Brexit among town-dwellers, and the countervailing values of many young urbanites, has sparked a deep debate about how and why towns are locked out of the circuits of growth in the modern economy, and how the inequalities associated with economic geography can be more effectively tackled.

The *Townscapes* project launched at the Bennett Institute brings together a variety of different data sources to offer a deeper analysis of how towns are faring across the regions and nations of Britain. It aims to step away from the generalisations and dogmas that infuse much of the contemporary policy debate and offer instead a more finely grained picture of how different towns relate to their wider regions and nations, as well as to their nearest cities. It showcases the merits of a more granular and regionally rooted perspective for our understanding of geographical inequalities and the kinds of policy needed to address them.

Analysts at the Bennett Institute have pulled together a variety of different data sources - from the ONS, Ordnance Survey and StatsWales - and created new indicators to measure the relative economic performance of towns, and compile a picture of changes in levels of public service provision. Specifically we have compiled an **Improvement Index** for all towns, which measures relative changes across a basket of economic and demographic indicators, and separate **Public Services Indices**, which supply a picture of changes to service provision in areas like health, education, transport and infrastructure.[1]

On the basis of these findings, we argue that policy makers need to consider multiple town categorisations, to get beneath the broad groupings that have become so dominant in this debate such as 'university', 'coastal', or 'post-industrial' towns. Instead we adopt a more useful data-driven typology developed by the ONS (2019) to contrast the fortunes of 'working', 'partially residential' and 'residential' towns in different parts of the country, and explore the crucial importance for many towns of their geographical distance from large urban centres.

These reports bust some of the prevalent myths about towns and their fortunes since the recession of 2007-08, and lead us towards a better appreciation of the very different circumstances and factors which affect the lives and opportunities of those who live in them. In addition to the insight and evidence which each supplies, we point policy-makers to ideas and proposals that are tailored to the regional and national circumstances which are pertinent to the townscapes of modern Britain.

Professor Michael Kenny
Director of the Bennett Institute, Cambridge University

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1.   These measures are developed drawing on the work of Pike et al (2016) and Jennings and Stoker (2019).

Wales - Key Findings

- Wales has, on average, more deprivation in its towns than any other region in England or Scotland.

- Seven towns in Wales have twice as much 'severe deprivation' than the average British town.

- Eight out of the ten most deprived towns in Wales are located in the South Wales Valleys.

- No Welsh town features in Britain's 40 most economically improving towns.

- Welsh towns are mostly small with dense public service provision – they provide more schools, doctor's surgeries and bus stops than towns elsewhere.

Introduction

Wales is home to over a million town-dwellers. This is more than the population of Swansea and Cardiff combined. But none of them contains more than 70,000 residents. Wales' townscape is made up of many different, relatively small towns. Very few of these places have expanded their size significantly, nor have they grown dramatically in terms of jobs, services and residents. **No Welsh town features in Britain's 40 most economically improving towns over the last decade.** One of the key policy challenges Wales faces, with only a few large cities and a few 'boom towns', is how to ensure that public services and good quality employment are widely accessible. As a recent report from Carnegie UK puts it: 'policy-makers in this context need to look hard at those towns that have successfully managed to utilise the Welsh landscape regardless of how remote their location' (Petrie et al., 2019).

Welsh towns are also characterised, in relative terms, by high levels of poverty. **On average, Wales has more deprivation, and severe deprivation, in its towns than any of England's regions or Scotland. Seven towns in Wales have twice as much 'severe deprivation' as the average British town.**

It is also the case that when it comes to economic outcomes, most Welsh towns have been underperforming compared to their counterparts in other parts of Britain over the last decade. But the picture is a quite complicated one. The relative smallness of Welsh towns mean that most are more compact places, and tend to provide jobs and public services within their local boundary. Consequently Welsh towns have more doctor's surgeries, schools and bus stops than towns elsewhere in Britain.

Wales also has a townscape that is largely spread along its long coastline. Coastal towns are often associated with shipping, tourism and other traditional industries which have experienced long-term decline in Britain. This report finds that the picture for coastal towns in Wales is mixed. We see examples of places that are improving, relative to other British towns, and have low levels of deprivation along different parts of the coastline. Policy-makers would do well to distinguish between those that more closely fit the mould of other isolated, ex-industrial towns and those which are more residential in character, especially those on the outskirts of Cardiff.

Another key finding in this report is that **eight out of 10 of the most deprived towns in Wales are located in the valleys.** This region's long-term economic struggles show few signs of abating and it is a hotspot for public service decline and low numbers of employment opportunities.

Image, above: Whiteford Lighthouse, Llanelli

Economic Performance of Wales' Towns

Wales is home to some of the most deprived towns in Britain. But the question of who is responsible for addressing these issues is, since devolution, a contested one. The UK Government is yet to provide clarity about how it expects to support Wales' towns through its £3.6bn Towns Fund – the latest *Towns Fund Prospectus* released in November, is targeted at the 101 English towns selected for funding at this stage (Ministry of Housing, Communities and Local Government, 2019a; 2019b). The Barnett Formula also puts further strain on the finances of its local authorities, which have been affected, for instance, by central government's attempt to make English local authorities more reliant on business rates rather than direct grant, a move that has resulted in the further reduction of local government budgets (Ifan & Siôn, 2019a). The Welsh Government budget, per person, remains 5% lower than its 2010-11 peak, and cuts to local government budgets over this period have resulted in a fall in Local Authority spending per person. This was 10.4% lower in 2018 than 2010 (Ifan & Siôn, 2019b; Siôn, 2019).

Another key dilemma for government in this area is whether priority should be given to investing in infrastructure and boosting business development in the country's city economies. Advocates of this strategy believe that its benefits will "trickle out" to populations in nearby towns, and focus on the need for the nearby population to be able to access opportunities that are created (see Rodriguez-Pose, 2017; Porter, 2018).

But Wales serves as a powerful illustration of the limits of 'agglomerationist' policies. Many of the country's towns would have no way of benefiting from the development of the country's major cities. In this context, the lack of economic clusters and low levels of central government funding, necessitate different approaches, we would suggest. Among these, the active promotion of 'anchor towns' (Bevan Foundation (2019)) seems especially promising -- places that are "beacons of collaborative and collective action by local actors to deliver fair, sustainable and inclusive economies". In a townscape like Wales', made up of small, isolated communities, policies designed to promote growth via cities are unlikely to address the position of those who live in smaller urban areas.

There have been various attempts by Welsh Government to address these challenges. A recent report from the Institute for Fiscal Studies (2016) report indicated that Wales has experienced smaller cuts to local authority spending than its English or Scottish counterparts. And the Welsh Government decided to increase council tax bills in order to offset reductions to the block grant it gets from Westminster, in part to protect Local Authority funding. The Welsh Government has also forged its own distinctive place agenda, introducing a town centre loan fund to be administered by participating Local Authorities. Meanwhile, a targeted regeneration programme has allocated £100m of funding from 2018 for councils to improve urban centres.

Economic Performance of Wales' Towns

A ministerial taskforce for the South Wales Valleys was set up in 2016 to deliver town regeneration in the region. The Taskforce's latest update showcases the creation of 11 'Discovery Gateways', a piloted out-of-ours bus service and three town masterplans (Welsh Government, 2019). Underpinning these initiatives the newly created platform 'Understanding Welsh Places' (2020), a collaborative project funded by Carnegie and the Welsh Government providing accessible statistics and analysis about small places in Wales, which categorises towns in Wales and indicates the levels of independence in their local economies.

Wales' towns display a diverse range of political values. Whilst its cities remain safe territory for the Labour party, much has changed since the 1997 and 2001 elections when Labour won 34 out of the 40 constituencies across Wales. In 2019 the Conservatives received a vote share across Wales which was only four percentage points lower than Labour's, and it won six new seats compared to 2017. If we discount the seats based in the three largest cities (Swansea, Cardiff and Newport) the Conservatives now have as much representation in Wales as Labour. But, importantly there are also some striking differences in the political trajectory of these towns, undercutting easy assumptions about the growing appeal of the Conservatives in all of them. For example, Rhondda in the South returned a Labour MP for the thirteenth consecutive time. This seat is home to many ex-mining communities and has been one of Labour's safest electoral constituencies for many years. It was Labour's 5th safest seat in 2005 and, in 2017, its 60th safest seat. There is now, following the 2019 election, one Labour MP in the whole of the North -- in Alyn & Deeside.

Image, above: Maesteg

The Improvement Index

- The Improvement Index is a measure of town improvement or decline, relative to the average for British towns.
- The index reports changes in five indicators: population levels, youth population (15-19 year old %), education (NVQ Level 3+ %), business counts and employment levels (%).
- Changes are between the two censuses of 2001 and 2011, although business counts changes are measured between 2010 and 2016.
- Changes for each of the five indicators are standardised and summed to create the index.
- This is a revised version of an index developed by Pike et al. (2016) and Jennings & Stoker (2019) but is applied here at the Built-Up Area (BUA) geographic scale.

Economic Performance of Wales' Towns

Figure 1:

Improvement or Decline in Welsh Towns and Distance from City
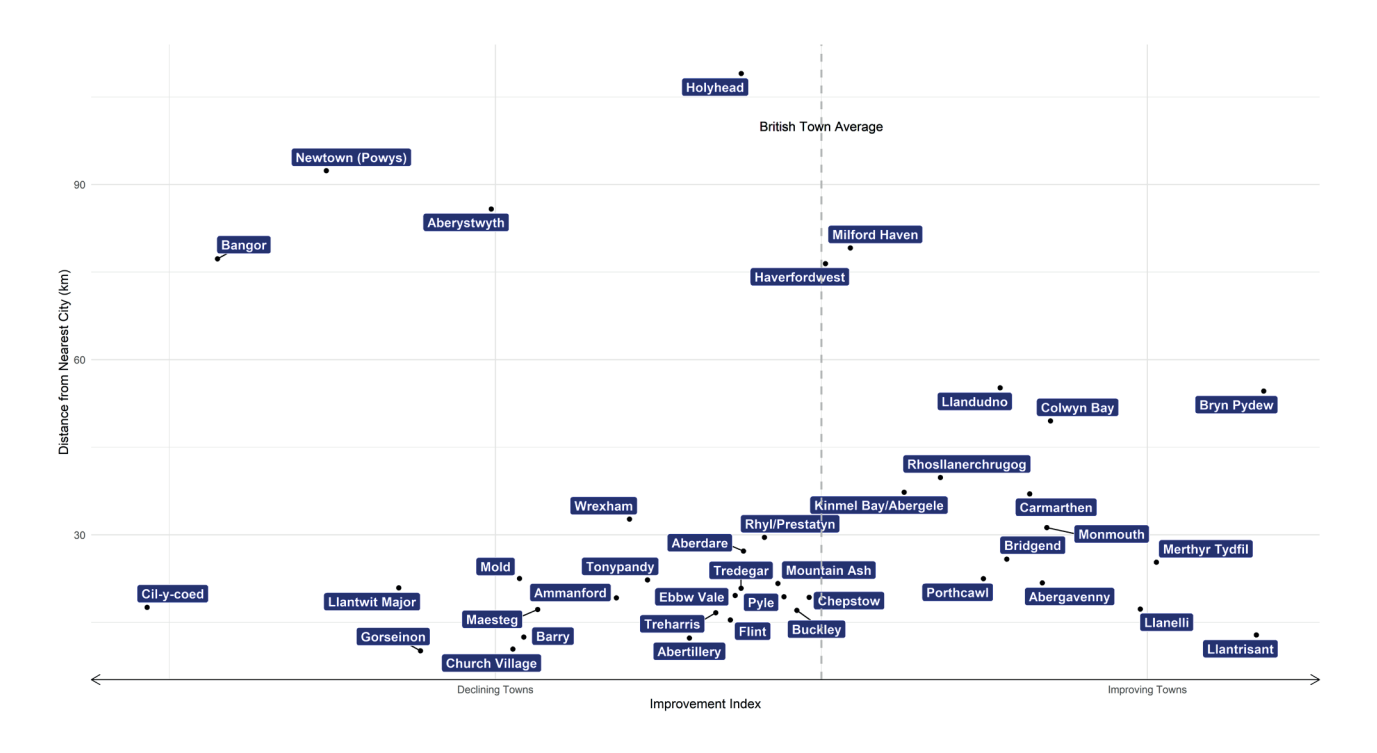

Figure 1.
Notes: Towns are any Built-Up Area with an estimated 2016 population of 10,000-175,000. 'Distance from Nearest City' measures the straight-line distance between geographic centres of a town and its nearest city.
Source: Census 2011; Office for National Statistics – UK Business: Activity, Size and Location; Built-up Areas Boundaries, V2; Scotland's Census 2011.

Overall, more towns are declining in relative terms, than improving, in Wales. Aberystwyth is a notable example of decline, in that, despite having the largest increase in youth population of any town in Britain between 2001 and 2011, it is falling back on various measures. A reduction in the number of businesses, and in its overall employment rate, suggests that the local economy is declining despite – or perhaps because – the local university is doing well. A report by Amplify Cymru (Green & Hodgson, 2017) on inequality in Aberystwyth found that the large 'visibility' of middle-class lifestyles amplified feelings of exclusion in what could feel like a two-tiered society for many inhabitants. Aberystwyth also slid down the rankings of Welsh towns for levels of deprivation in recent years (see figure 5). In 2009 the Welsh Government recognised this trajectory and included it as one of its seven 'regeneration areas' (BBC, 2011).

Cil-Y-Coed, in the South East, is the fastest declining town in the country in our analysis. The town had fewer inhabitants in 2011 than in 2001, and is ageing at a much faster rate than many of its counterparts.

Bryn Pydew and Llantrisant are the most improving towns in Wales, located respectively in the very North and South of the country. However, it is also telling that they sit outside the top 40 equivalent towns across Britain. Bryn Pydew's success is primarily due to increases in the educational attainment rates in its population, whilst Llantrisant's is a combination of improving education and employment rates.

Wales has a very diverse townscape, with major cities in the South but large rural areas elsewhere, which provide very different economic and cultural contexts for the towns located within them.

Our *improvement index* highlights the mixed fortunes of its coastal towns. Three of these on the North coast form a cluster characterised by high levels of improvement: Bryn Pydew, Colwyn Bay and Llandudno. This area has been targeted for regeneration spending, and these results may well reflect the effectiveness of this investment (Hughes, 2019).

But statistics like this can never tell the whole story about a place. The demolition of Llandudno's Arcadia in 2004 – the town's Victorian theatre which had been running since 1916 thanks to community participation and a sense of joint ownership – highlights that statistics cannot measure everything that happens in a town (Centre for Towns, 2019). Meanwhile the poor fortunes of a number of towns on the South coast, such as Llantwit Major and Barry, are reminders that the consequences of industrial decline are felt over a long time period, and are perhaps especially acute among coastal communities.

Image, above: Llandudno

Economic Performance of Wales' Towns

Figure 2:

Public Services in Welsh Towns: Changes and Per Capita Provision
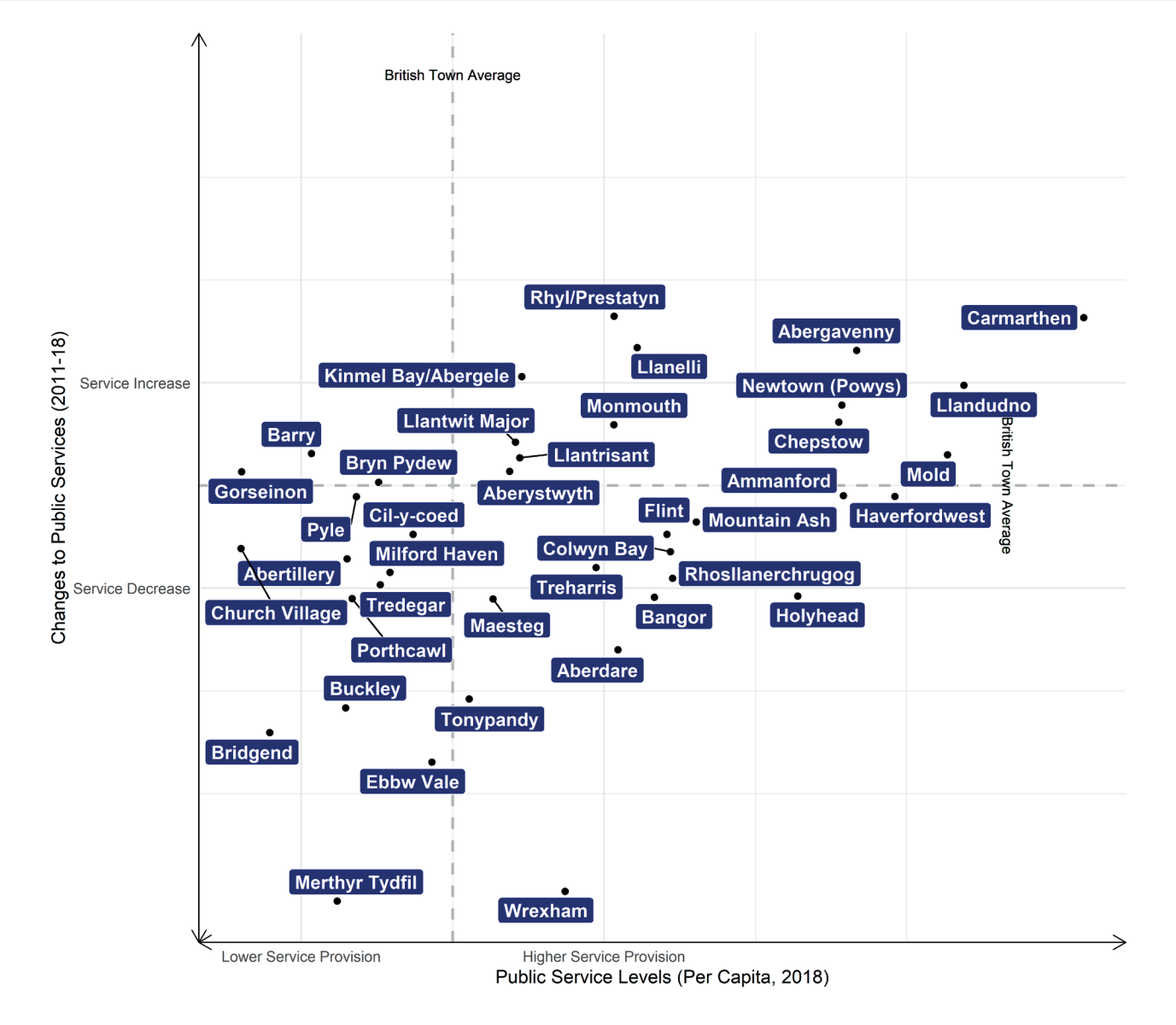
British Town Average

Changes to Public Services (2011-18)

Service Increase

Service Decrease

Lower Service Provision

Higher Service Provision

Public Service Levels (Per Capita, 2018)

British Town Average

Rhyl/Prestatyn

Carmarthen

Abergavenny

Llanelli

Kinmel Bay/Abergele

Newtown (Powys)

Monmouth

Llandudno

Llantwit Major

Chepstow

Barry

Llantrisant

Bryn Pydew

Mold

Gorseinon

Aberystwyth

Ammanford

Haverfordwest

Cil-y-coed

Flint

Pyle

Mountain Ash

Milford Haven

Colwyn Bay

Rhosllanerchrugog

Abertillery

Treharris

Church Village

Tredegar

Bangor

Holyhead

Maesteg

Porthcawl

Aberdare

Buckley

Tonypandy

Bridgend

Ebbw Vale

Merthyr Tydfil

Wrexham

Wales has mixed results on the new *Public Services Indices* which we have developed. On average it's towns are much smaller than those in other British regions, and it's services are more densely provided. Figure 2 shows that some have more public services *per capita* relative to other British towns[2]. **Carmarthen comes out top of all towns in Britain on this index.** It scores particularly highly for the number of bus stops and health services it has per resident. Meanwhile no Welsh conurbation features in our list of 40 places with the sparsest public service provision. However, in terms of changes to public services, Welsh towns seem more alike other places in Britain. Two towns, Merthyr Tydfil and Wrexham, appear in the group of 10 towns to have experienced the largest decline in public service density since 2011.

Public Service Indices

- The public service indices are measures designed to capture the relative density of, and changes to, public service provision in British towns.
  1. There are two separate measures: 'Public Service Levels' reports the per capita number of: GPs, schools, nursery schools, bus stops, community halls, post boxes and health services.
  2. 'Changes to Public Services' counts changes in the numbers of GPs, schools, nursery schools, bus stops, community halls, police stations and health services between 2011 and 2018.
- For both measures, each indicator is standardised and summed to create an index score.
- These measures cannot indicate the quality of public service provision, nor the accessibility, as such a high score is not necessarily better than a low score.

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2. It may be the case that the number of services in a town does not represent the amount of provision as we have no means to measure the size, funding or demand of these services.

Economic Performance of Wales' Towns

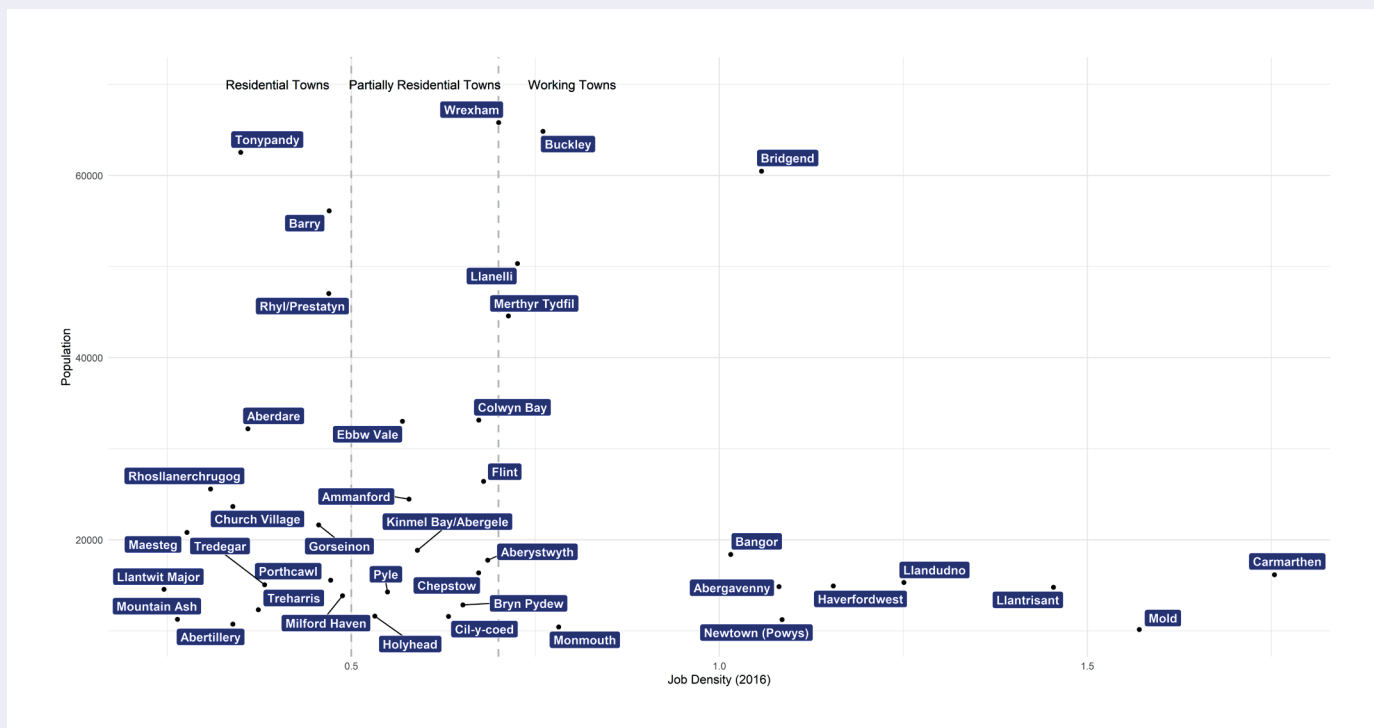**Figure 3:**
Job Density and Population Size

Figure 3.
Notes: Job density, as measured here, does not include self-employment.
Source: Census 2011, Office for National Statistics – Business Register and Employment Survey; Mid-Year Population Estimates; Scotland's Census, 2011; National Records of Scotland – Mid-Year Population Estimates.

Figure 3 builds on research undertaken by the ONS (2019) which reveals that many towns in England and Wales are largely 'residential' in nature, with different features and functions to 'working' towns[3]. Our analysis reveals a broad range of types of town in Wales. Carmarthen has the most number of jobs per resident of all Welsh conurbations just as it has the most services per resident. Mold and Buckley also represent a centre for employment. These two 'working towns' located in the North of Wales provide significant numbers of jobs within the local economy. Among larger towns in Wales, Bridgend appears to have the most protected local economy and Tonypandy the least. These two places, only 10 miles apart, have very different economies and epitomise the variation between towns. Tonypandy is a relatively declining, former mining town in the South Wales Valleys. Bridgend is relatively improving, has lower levels of deprivation and is home to a number of manufacturing companies. These two places are both ex-mining towns in South Wales, with similar commutes to Cardiff, but their different trajectories exemplify the dangers of generalising about the history and fortunes of towns.

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3. Distinction between working, partially residential and residential towns is made based on the 'job density' in a town. Job density is total employment in a town divided by its estimated population. This typology was created by the ONS (2019) to express the different functions of towns.

Economic Performance of Wales' Towns

Figure 4:

Deprivation in Welsh Towns: Percentage of Households with many levels (severe) or at least one level of deprivation

Figure 4.
Notes: Slight deprivation is counted as any household that contains at least one of the following: an unemployed/ long-term sick member; no member with at least level 2 qualifications; a member with 'bad or very bad' health; no central heating or is overcrowded/ shared. Severe deprivation is measured as any household with at least three of these forms of deprivation.
Source: Census 2011

Figure 4 displays two measures of deprivation.[4] On the y-axis is the percentage of households that are slightly deprived and the x-axis displays severe deprivation. This distinction relates to how many forms of deprivation each household experiences. This figure reveals the large extent of deprivation in Welsh towns compared to the British average – represented by the dashed grey lines. **Wales has, on average, more deprivation in its towns than any other region in England or Scotland. Only seven out of the 40 towns in Wales have lower levels of severe deprivation than the British town average whilst another seven in Wales have twice as much.** This graph also shows that towns with lower levels of slight deprivation have significantly fewer severely deprived residents.

The figure has four labelled quadrants. In quadrant 4 there are seven Welsh towns which have below average levels of both severe and slight household deprivation. The majority of these lie to the south of the South Wales Valleys, and are near to Cardiff. In 'quadrant 3' there are two towns, Mold and Bridgend. Although they have lower levels of slight deprivation than the British average, they have higher rates of severe deprivation. Bridgend is the most extreme outlier here. It may be more generally affluent than most other towns because more households experience zero forms of deprivation. However, the deprivation that exists within the town is much more likely to be severe. This could represent a troubling inequality for the town as it contains both more non-deprived residents and more severely deprived residents than is normal for towns across Britain.

Quadrant 2 contains the vast majority of Welsh towns and these have higher-than-average levels of slight and severe deprivation. There are many towns in this quadrant that have considerably higher levels of deprivation than the British average, such as Maesteg, Mountain Ash and Tredegar. **Five of the ten towns in Britain with the highest levels of severe deprivation are in Wales.** Finally, Quadrant 1 contains just one town, Cil-y-coed. It is less generally affluent than average in that it has higher levels of residents who are in some way deprived. However, the deprivation in the town is less severe than in other places.

Image, above: Crags above Glenboi, Mountain Ash

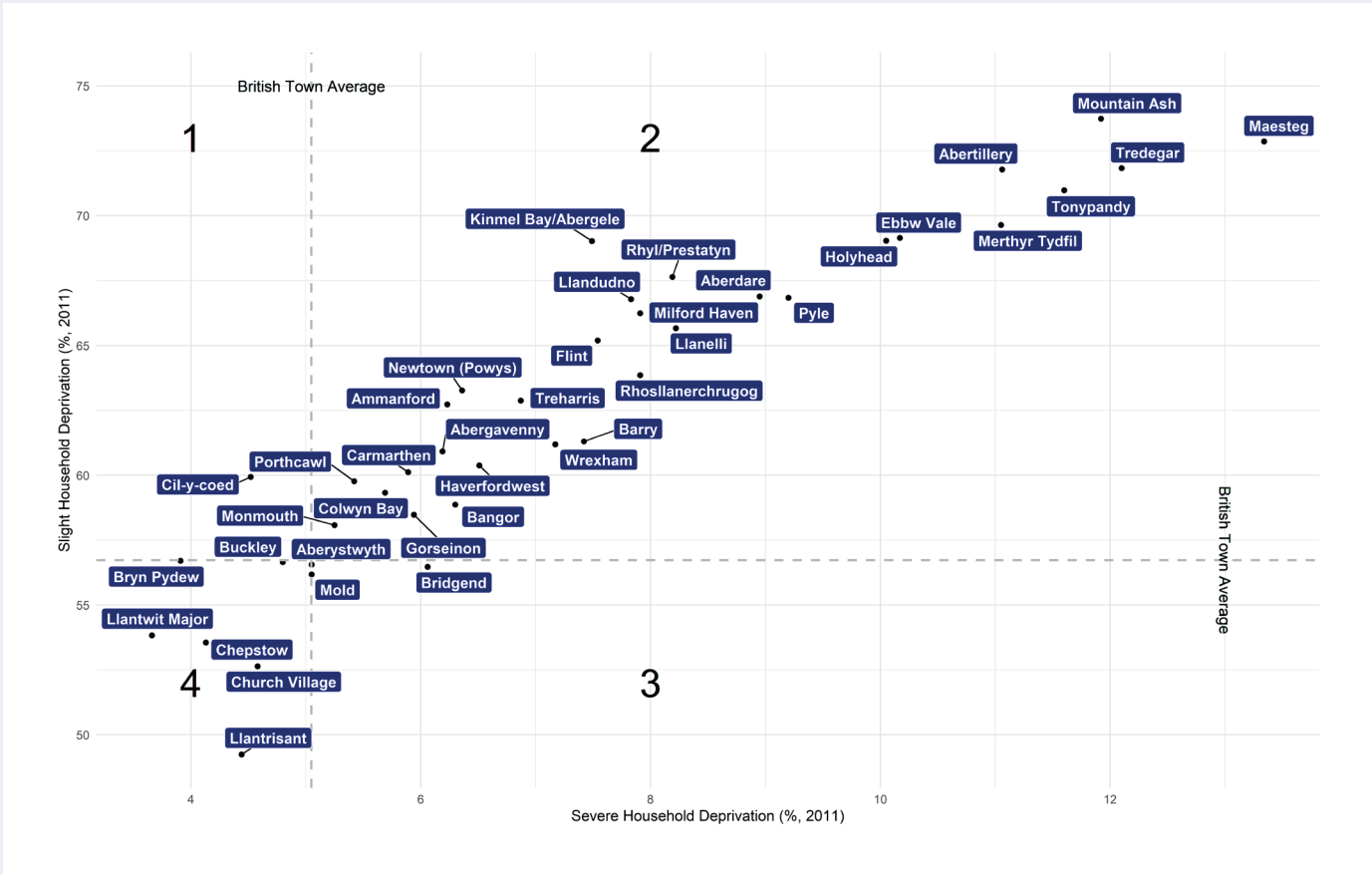4. Deprivation rate data is taken from the 2011 Census. Slight deprivation is counted as any household that contains at least one of the following: an unemployed/ long-term sick member; no member with at least level 2 qualifications; a member with 'bad or very bad' health; no central heating, or is overcrowded/ shared. Severe deprivation is measured as any household with at least three of these forms of deprivation.

Economic Performance of Wales' Towns

Figure 5:

Recent changes to Deprivation in Welsh towns
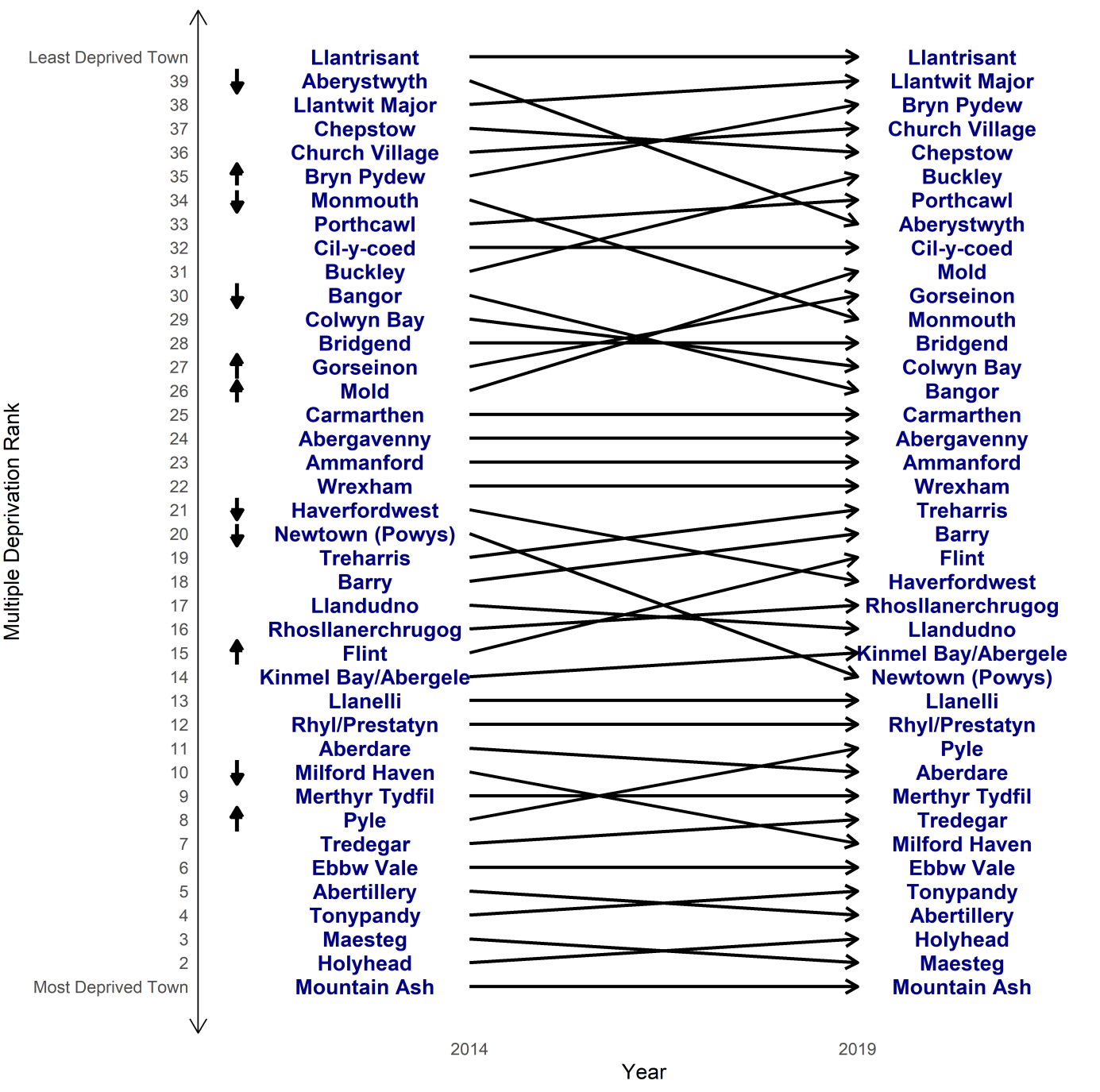
Figure 5.
Notes. Deprivation rankings are constructed from the Welsh Index of Multiple Deprivation. Built up from LSOA to BUA using ONS best-fit lookups. Population-weighted averages from the small-scale geographies are taken for each town.
Source. StatsWales – Welsh Index of Multiple Deprivation.

Figure 5 reports changes to a more recent measure of deprivation produced by StatsWales. The rankings in 2014 and 2019 show that towns' rankings for different measures of poverty have not shifted very much in the last five years. Only 11 of the 40 towns have shifted ranking by 3 places or more (as indicated by the small arrows). From these rankings we can see that, in 2019, **eight out of the 10 most deprived towns in Wales are located in the South Wales Valleys.** This graph also indicates which towns have had greatest increases or declines in recent deprivation rankings. Aberystwyth, Monmouth and Newtown had the biggest shift down the rankings indicating greater relative deprivation whilst Mold, Flint and Pyle were some of the more improving towns based on this measure.

Economic Performance of Wales' Towns

Figure 6:
Index of Town Improvement
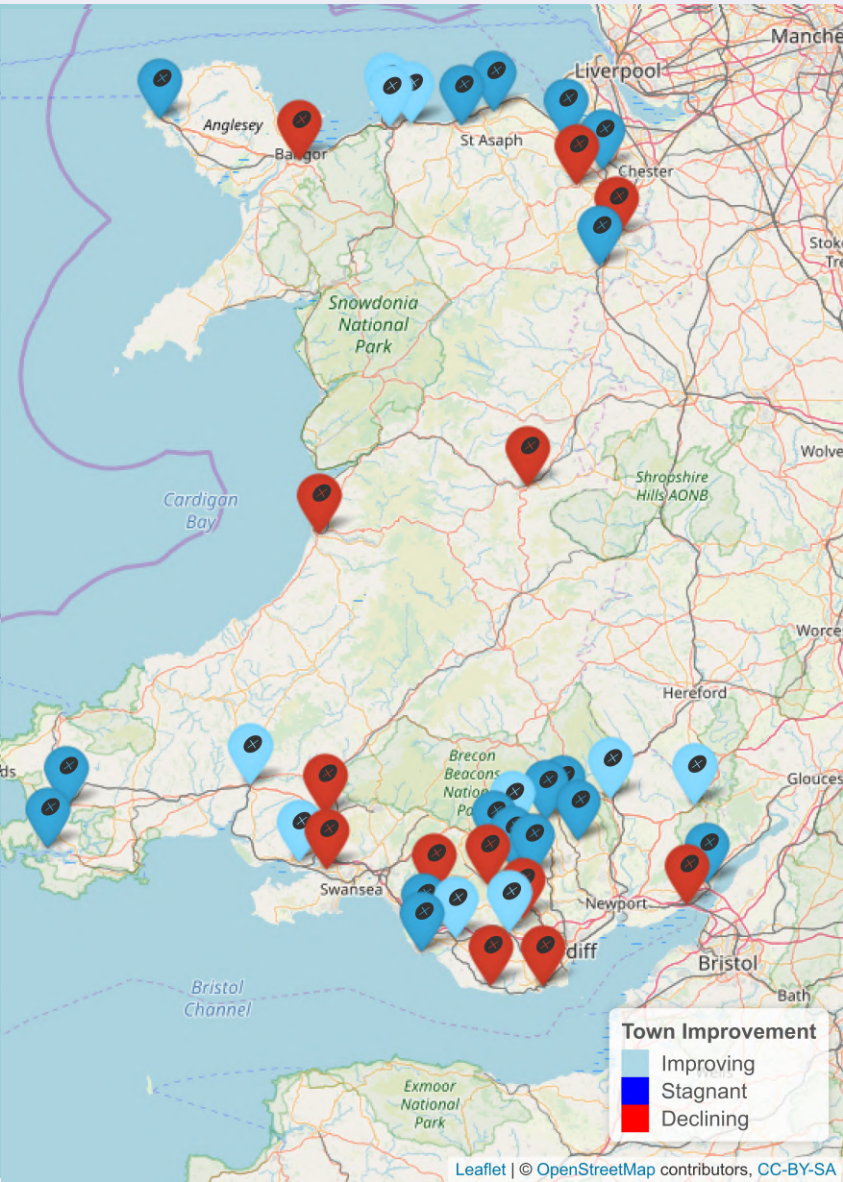
Figure 6.
Notes: These relative indices are aggregates of standardised measures. Light Blue markers have an Improvement Index score > 1, red markers have a total of <1.
Source: Census 2011; Scotland's Census, 2011; Office for National Statistics – UK Business: Activity, Size and Location; Built-up Areas Boundaries, V2.

Figure 7:
Public Service Levels
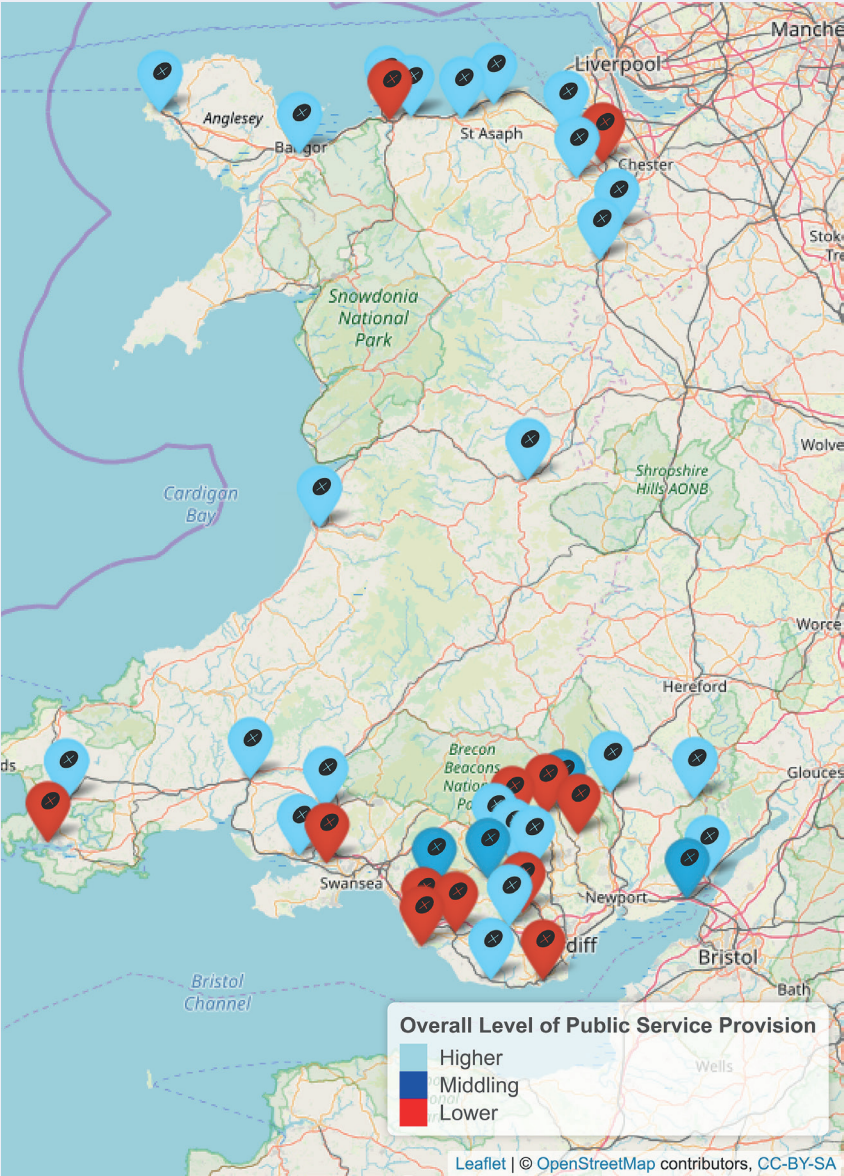
Figure 7.
Notes: These relative indices are aggregates of standardised measures. Light blue markers have a total score > 1, red markers have a total of <1.
Source: Office for National Statistics – Mid Year Population Estimates; Built-up Areas Boundaries, V2; Ordnance Survey – Points of Interest (© Crown copyright and database rights 2019 Ordnance Survey (100025252)); National Records of Scotland – Mid-Year Population Estimates.

Figure 7 shows that many towns in Wales have relatively high levels of public services. This is particularly true in the North of the country.

Economic Performance of Wales' Towns

Figure 8:
Changes to Public Service Levels
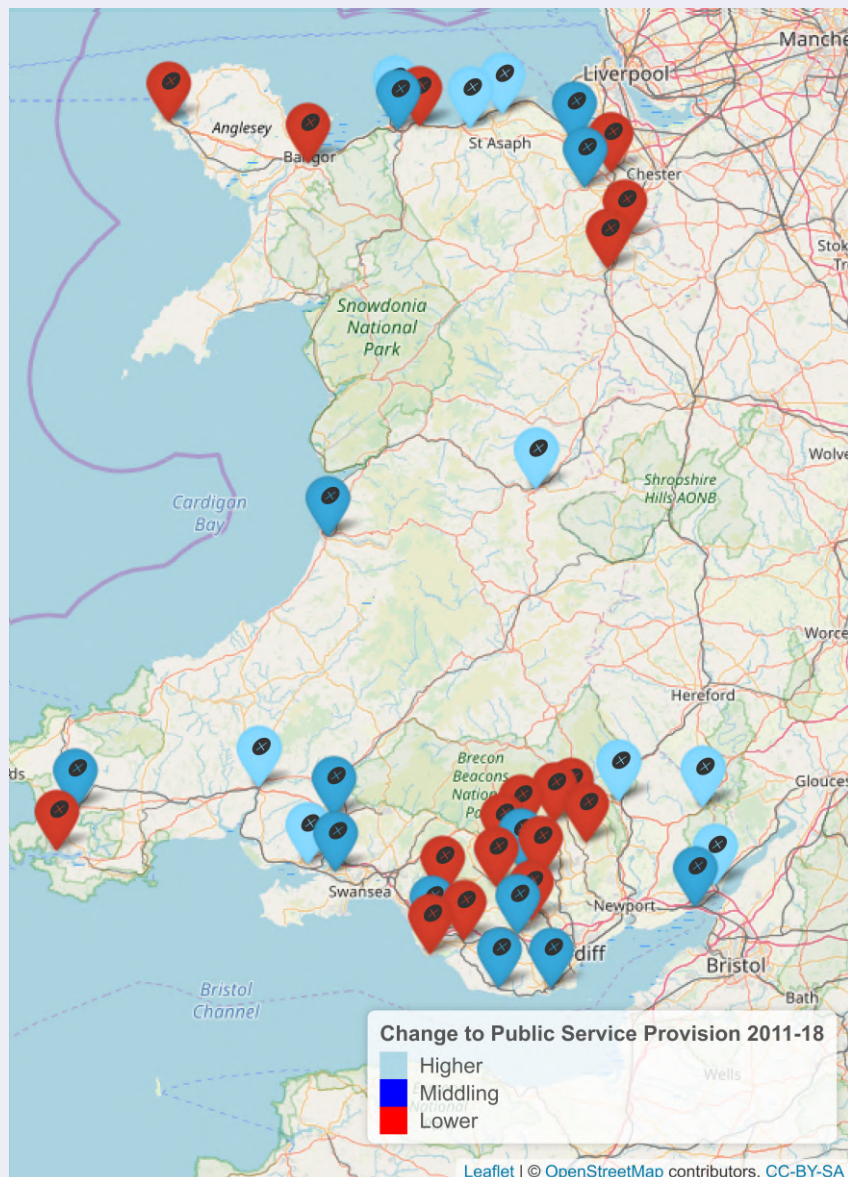
Figure 8.
Notes: These relative indices are aggregates of standardised measures. Light blue markers have a total score > 1, red markers have a total of <1.
Source: Office for National Statistics – Mid Year Population Estimates; Built-up Areas Boundaries, V2; Ordnance Survey – Points of Interest (© Crown copyright and database rights 2019 Ordnance Survey (100025252)); National Records of Scotland – Mid-Year Population Estimates.

Figures 8 and 9 show that towns in the South Wales Valleys experience challenges in several ways. These are the most deprived towns in Wales on multiple measures. However, many have also experienced very marked losses of public service organisations since 2011, and low levels of jobs per resident.

Figure 9:
Residential - Working Town Typology
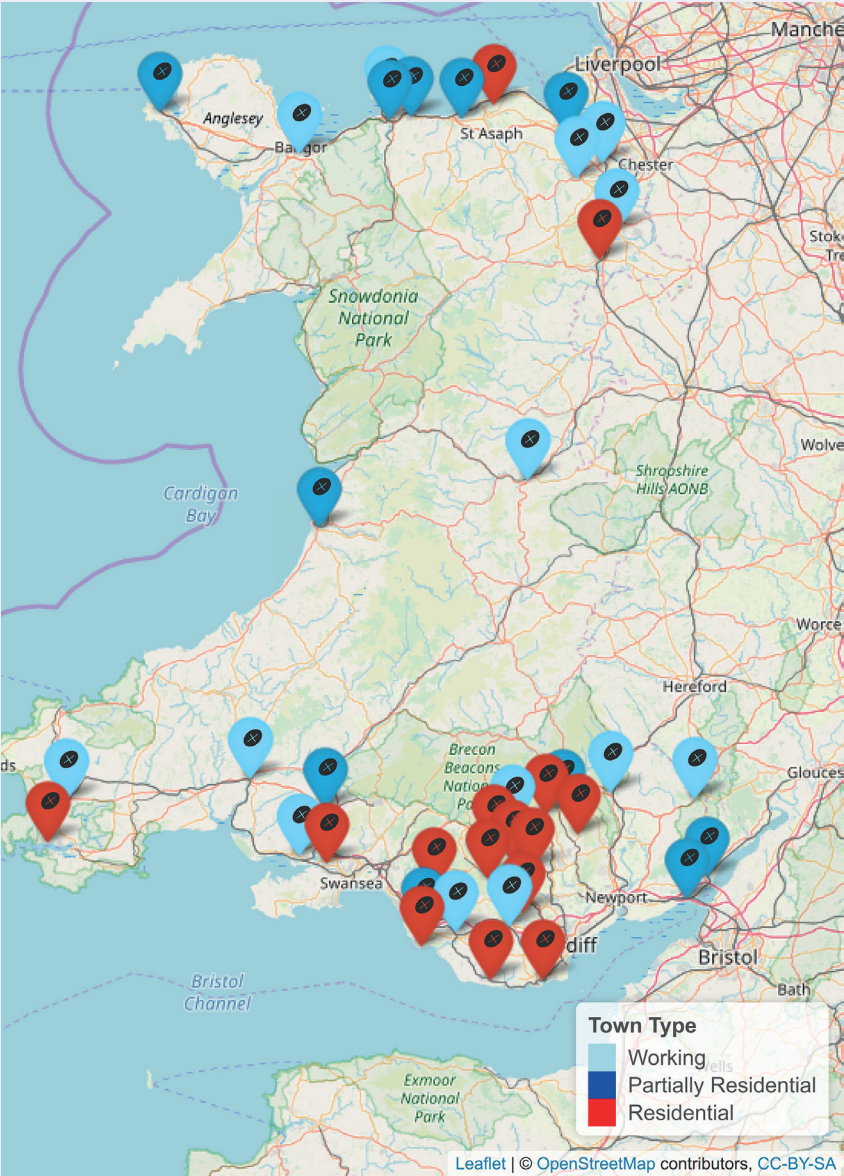
Figure 9.
Notes: ''Residential towns' are all towns with fewer than 0.5 jobs per resident, 'working towns' have greater than 0.7 jobs per resident. **Source:** Census 2011; Scotland's Census, 2011; National Records of Scotland, Mid-Year Population Estimates; Office for National Statistics – Business Register and Employment Survey; Mid-Year Population Estimates.

Town Type
Working
Partially Residential
Residential

Leaflet | © OpenStreetMap contributors, CC-BY-SA

Public Service Provision in Wales

There has been a notable fall in the number of services that are provided within Wales' towns. Those that have experienced most losses in terms of schools, health services, bus stops and childcare services over this period are Wrexham, Buckley and Flint, all located in North East Wales. Buckley has lost 24 children's nursery schools as well as some compulsory education schools since 2009. Furthermore, the closure of Elfed High School's Sixth Form means that the town has more diminished provision than a decade ago, in early years, compulsory education and further education (Mann, 2014). Meanwhile Wrexham lost 55 bus stops between 2012 and 2013, which may be explained by cuts to school bus routes (BBC, 2010). Finally, the closing of Flint's community hospital in 2013 is one of the 10 losses in health service providers over the period.

Aberdare is one of the few towns in Britain to lose its only hospital in the last 10 years. The 32,000 inhabitants lost access to the Aberdare hospital as well as the nearby Mountain Ash hospital which were both replaced by a £82 million hospital outside of the town (WalesOnline, 2012).

But in one respect – GPs surgeries – towns in Wales are doing quite well, in relative terms. **Welsh towns make up two of the top five, and four of the top ten towns for GPs practices per person** – whilst none of its conurbations appear in the bottom fifteen. Mountain Ash, for example, has four doctor's surgeries. Figure 10 confirms this trend as Welsh towns tend to have more doctor's surgeries, bus stops and schools than their British counterparts.

Image, above: *Aberdare*

Figure 10:
Services in Welsh Towns compared to the rest of Britain

Schools

Towns in Rest of Britain

1.64 ***

Welsh Towns

-15   -10   -5   0   5   10   15

Relative Number of
Schools

Bus Stops

Towns in Rest of Britain

21.29 *

Welsh Towns

-40   -20   0   20   40

Relative Number of Bus
Stops

Doctor's Surgeries

Towns in Rest of Britain

0.77 *

Welsh Towns

-4   -2   0   2   4

Relative Number of
Doctor's Surgeries
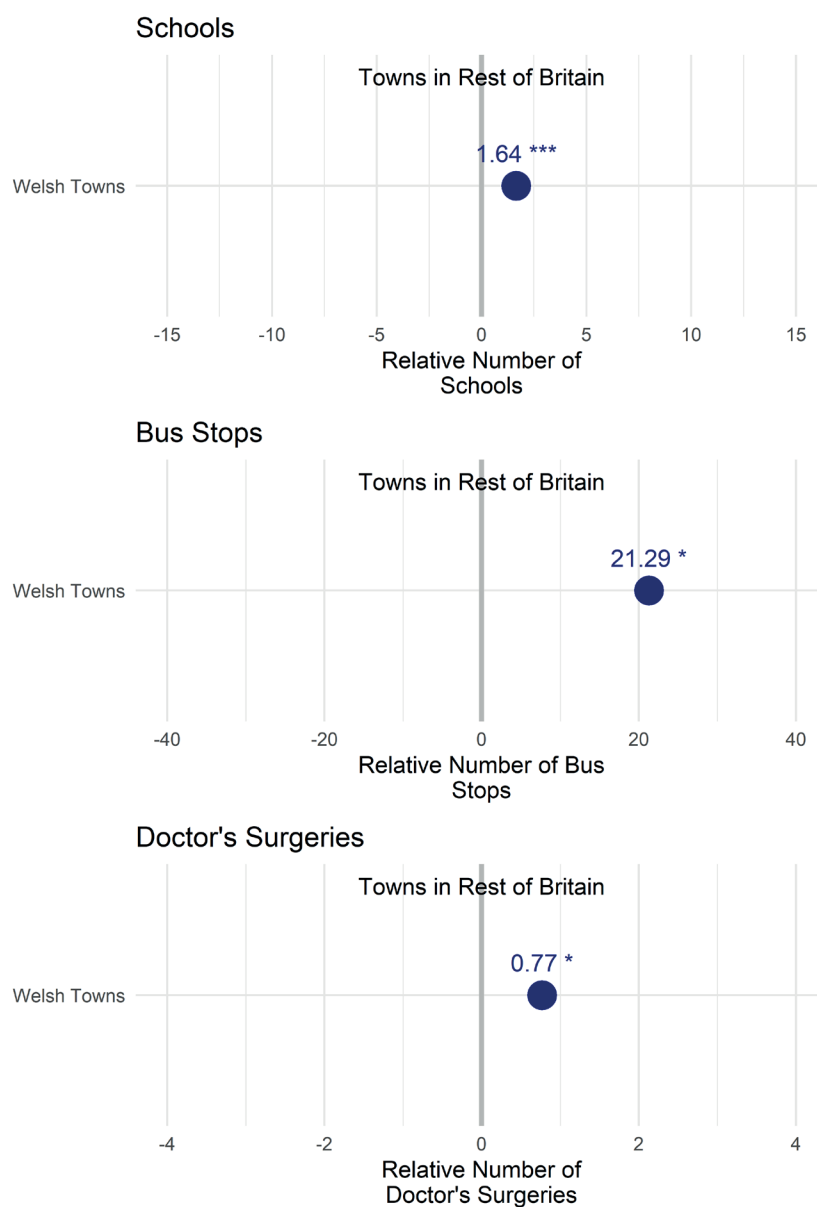
Figure 10.
Notes: OLS regression controlling for: area, population, deprivation rate, the improvement index, job density and distance from nearest city. *p<0.1, **p<0.05, ***p<0.001.
Source: Census 2011, Office for National Statistics – Business Register and Employment Survey; UK Business: Activity, Size and Location; Built-up Areas Boundaries, V2; Mid-Year Population Estimates; Scotland's Census, 2011; National Records of Scotland – Mid-Year Population Estimates; Ordnance survey – Points of Interest (© Crown copyright and database rights 2019 Ordnance Survey (100025252)).

Comparing Public Services in Wales' Towns to the Rest of Britain

A town is 16% less likely to have a police station if it is located in Wales. Figure 11 indicates that these are much more likely to be found in 'working towns' with higher levels of job density than 'residential towns'.

Figure 11:

Services in Welsh Towns compared to the rest of Britain

Predicted Probability of a Town-based Police Station
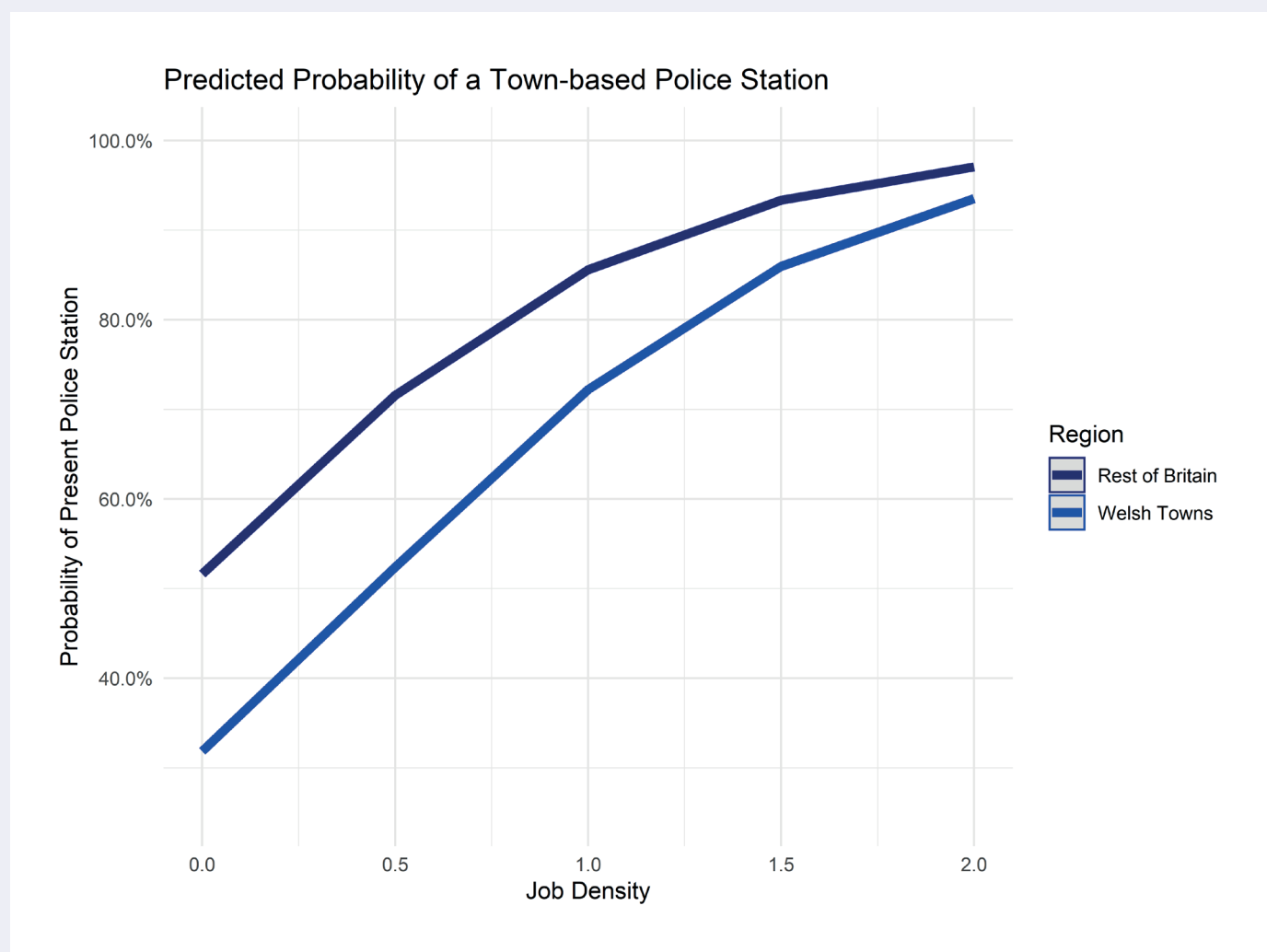
Figure 11.
Notes: Logistic regression controlling for: area, population size, distance from nearest city, job density and Improvement Index.
Source: Census 2011, Office for National Statistics – Business Register and Employment Survey; UK Business: Activity, Size and Location; Built-up Areas Boundaries, V2; Mid-Year Population Estimates; Scotland's Census, 2011; National Records of Scotland – Mid-Year Population Estimates; Ordnance survey – Points of Interest (© Crown copyright and database rights 2019 Ordnance Survey (100025252)).

Overview and Implications

Welsh towns are notable for their high levels of deprivation compared to their counterparts across Britain.

With relatively few large economic clusters and a townscape comprised of many small, and some coastal, communities, towns in Wales have suffered economically more than any other British region. And, while a good deal of political attention is currently focused upon the plight of left-behind places in post-industrial England, the position of towns in Wales merits a similar focus.

This report has highlighted a significant variation in the fortunes of conurbations located in the same area, or with similar coastal geographies. The 'town masterplans' developed by the Welsh Government's ministerial taskforce for the South Wales Valleys is a positive indication that these places are beginning to elicit the attention of policy-makers.

Responsibility for the policies that affect these places falls between local, national and UK governments. Funding for Network

Rail and some rail infrastructure investment remains a reserved power for the Secretary for State for Transport. In relation to towns specifically, there is a clear need for the UK Government to clarify how much of its £3.6bn Towns Fund will be directed to Wales (Prime Minister's Office, 2019). Last autumn a series of Growth Deals were announced for each region in Wales. This was followed by an election campaign during which the Conservative party promised to 'unleash a tide of investment' in Wales (BBC, 2019). The difficult challenge for the new government will be to follow up its rhetoric about 'levelling up' the UK's underperforming regions with policies which make a real difference to local economies – and the people relying on them.

Equally, some important policy levers that can affect local economies are available to the devolved Welsh Government. It has responsibility for regeneration plans, NHS Wales, education, skills and training, as well as the delivery of transport services such as buses and the South Wales Metro. Its funding is constrained by the formula employed by the UK government to determine levels of spending across the UK, and Wales undoubtedly does poorly in relative terms from the workings of the Barnett formula. The Welsh Government budget, per person, remains 5% lower than its 2010-11 peak, and cuts to local government budgets over this period have resulted in a fall in Local Authority spending of 10.4%, in 2018, compared to funding levels in 2010 (Ifan & Siôn, 2019b; Siôn, 2019).

This briefing has also highlighted how the compact nature of many Welsh conurbations means that, despite low levels of economic improvement and high deprivation, many of its towns score relatively well in terms of the numbers of services and jobs they provide per resident. In Wales, there are some notable examples of towns that have managed to maintain a sustainable local economy without becoming large urban conurbations. Finding ways of supporting the businesses and services which sustain the employment opportunities in these places is a vital challenge for different tiers of government.

Key Findings from our Wales Townscapes Survey:

- Wales has on average more deprivation in its towns than any other region in England or Scotland.

- Seven towns in Wales have twice as much 'severe deprivation' as the average British town.

- 8 out of the 10 most deprived towns in Wales are located in the South Wales Valleys.

- No Welsh town features in Britain's 40 most economically improving towns.

- Welsh towns are mostly small and dense – they also provide more schools, doctor's surgeries and bus stops than towns elsewhere.

Descriptive Statistics and Regression Tables

Table 1:
Descriptive Statistics

Town	Population	Distance from City (Km)	Land Area (Km²)	Household Deprivation (%)	Job Density
Aberdare	32193	27.23	7.93	66.89	0.36
Abergavenny	14867	21.79	4.58	60.92	1.08
Abertillery	10748	12.33	2.26	71.79	0.34
Aberystwyth	17768	85.80	4.81	56.56	0.69
Ammanford	24471	19.21	11.19	62.73	0.58
Bangor	18401	77.27	4.28	58.87	1.02
Barry	56124	12.50	14.23	61.30	0.47
Bridgend	60488	25.84	19.51	56.47	1.06
Bryn Pydew	12861	54.63	3.86	56.70	0.65
Buckley	64853	17.07	21.32	56.65	0.76
Carmarthen	16169	37.01	5.57	60.12	1.75
Chepstow	16383	19.31	5.11	53.56	0.67
Church Village	23662	10.44	5.37	52.64	0.34
Cil-Y-Coed	11599	17.59	3.15	59.94	0.63
Colwyn Bay	33157	49.52	10.17	59.33	0.67
Ebbw Vale	33027	19.62	9.50	69.14	0.57
Flint	26416	15.44	8.50	65.19	0.68
Gorseinon	21635	10.15	5.94	58.47	0.46
Haverfordwest	14933	76.46	6.50	60.38	1.15
Holyhead	11629	109.01	3.10	69.04	0.53

Kinmel Bay/Abergele	18855	37.31	6.97	69.02	0.59
Llandudno	15318	55.18	3.93	66.78	1.25
Llanelli	50339	17.30	15.08	65.67	0.73
Llantrisant	14789	12.88	4.61	49.24	1.45
Llantwit Major	14577	20.94	5.76	53.83	0.25
Maesteg	20820	17.23	5.19	72.86	0.28
Merthyr Tydfil	44585	25.32	11.59	69.64	0.71
Milford Haven	13873	79.15	3.77	66.24	0.49
Mold	10161	22.52	3.35	56.18	1.57
Monmouth	10437	31.25	3.35	58.08	0.78
Mountain Ash	11277	21.69	1.87	73.74	0.26
Newtown (Powys)	11244	92.37	4.65	63.27	1.09
Porthcawl	15572	22.50	4.28	59.77	0.47
Pyle	14280	19.40	3.90	66.84	0.55
Rhosllanerchrugog	25583	39.84	7.70	63.85	0.31
Rhyl/Prestatyn	47058	29.58	12.90	67.64	0.47
Tonypandy	62558	22.28	12.75	70.98	0.35
Tredegar	15065	20.85	4.93	71.83	0.38
Treharris	12324	16.68	3.17	62.88	0.37
Wrexham	65820	32.69	17.36	61.19	0.70

Table 1
Source: Census 2011, Office for National Statistics – Business Register and Employment Survey; Built-up Areas Boundaries, V2; Mid-Year Population Estimates

Descriptive Statistics and Regression Tables

Table 2a:
Public Services

Town	Nurseries	Community Halls	Post boxes	Schools	Health Services	Bus Stops	Further Education Colleges
Aberdare	5	10	43	18	51	202	1
Abergavenny	2	10	25	8	44	87	0
Abertillery	0	2	11	1	18	78	0
Aberystwyth	5	5	34	5	41	98	1
Ammanford	5	4	47	15	47	259	1
Bangor	2	10	27	10	37	110	2
Barry	6	16	59	18	87	302	1
Bridgend	11	13	59	24	90	314	3
Bryn Pydew	5	0	23	1	18	84	0
Buckley	17	18	61	23	70	326	1
Carmarthen	7	6	41	8	53	152	1
Chepstow	8	3	30	8	35	98	0
Church Village	3	7	20	9	25	85	0
Cil-Y-Coed	3	2	14	6	14	51	0
Colwyn Bay	9	14	66	13	78	182	2
Ebbw Vale	4	12	36	10	51	164	0
Flint	9	6	32	14	41	149	0
Gorseinon	4	2	19	8	26	129	1
Haverfordwest	7	9	31	9	32	63	1
Holyhead	3	8	16	6	18	66	1

Kinmel Bay/Abergele	8	7	30	6	31	96	1
Llandudno	5	7	34	7	57	100	0
Llanelli	12	25	60	24	75	420	1
Llantrisant	3	9	20	5	28	65	0
Llantwit Major	2	6	25	5	22	52	0
Maesteg	4	4	22	10	29	164	1
Merthyr Tydfil	5	11	42	21	48	346	1
Milford Haven	4	4	19	5	27	34	1
Mold	3	4	15	6	37	56	0
Monmouth	2	4	16	4	26	62	0
Mountain Ash	3	3	17	7	15	41	0
Newtown (Powys)	4	3	22	7	29	74	2
Porthcawl	2	1	25	5	31	106	0
Pyle	3	2	19	6	16	59	0
Rhosllanerchrugog	6	9	41	13	27	200	0
Rhyl/Prestatyn	19	15	69	15	88	281	0
Tonypandy	6	20	53	34	94	371	0
Tredegar	2	3	24	6	16	132	0
Treharris	4	5	21	4	18	85	0
Wrexham	19	25	73	26	100	508	2

Table 2a.
Source: Ordnance survey – Points of Interest (© Crown copyright and database rights 2019 Ordnance Survey (100025252))

Descriptive Statistics and Regression Tables

Table 2b:
Public Services

Town	Mental Health	Hospitals	Train Stations	GPs	Job Centres	Fire Stations	Police Stations	Libraries
Aberdare	0	0	2	8	1	1	0	1
Abergavenny	2	1	1	3	1	1	1	1
Abertillery	0	0	0	4	1	1	0	0
Aberystwyth	3	1	1	2	1	1	1	2
Ammanford	1	0	2	6	1	2	2	1
Bangor	3	1	1	3	0	1	1	2
Barry	5	1	4	9	1	1	1	2
Bridgend	6	1	4	5	1	1	2	3
Bryn Pydew	0	0	1	3	0	0	0	0
Buckley	4	1	4	11	1	2	2	3
Carmarthen	4	1	1	3	1	1	2	2
Chepstow	0	1	1	5	1	1	1	1
Church Village	1	0	0	4	0	0	0	2
Cil-Y-Coed	0	0	0	2	1	1	0	1
Colwyn Bay	2	1	1	5	0	1	2	2
Ebbw Vale	3	1	1	9	1	2	2	2
Flint	1	1	1	8	0	2	1	2
Gorseinon	3	1	0	3	1	1	0	1
Haverfordwest	2	1	1	2	1	1	0	1
Holyhead	1	1	1	3	1	1	0	1

Kinmel Bay/Abergele	0	0	1	2	0	1	1	2
Llandudno	1	1	1	3	1	1	1	1
Llanelli	2	1	3	7	1	1	2	2
Llantrisant	0	0	1	2	1	1	0	2
Llantwit Major	0	0	1	4	0	1	0	2
Maesteg	1	1	3	4	1	2	0	2
Merthyr Tydfil	0	1	3	4	1	1	0	2
Milford Haven	2	0	1	2	0	1	1	0
Mold	2	1	0	3	1	1	1	1
Monmouth	1	1	0	2	0	1	1	1
Mountain Ash	0	0	1	4	0	0	0	1
Newtown (Powys)	1	1	1	2	2	1	1	1
Porthcawl	0	0	0	2	1	1	0	0
Pyle	1	0	1	3	0	1	0	1
Rhosllanerchrugog	0	0	1	6	0	1	1	3
Rhyl/Prestatyn	2	2	2	10	1	2	1	3
Tonypandy	3	1	6	13	3	2	0	4
Tredegar	1	0	0	1	0	1	0	1
Treharris	0	0	0	2	0	1	0	0
Wrexham	2	2	3	11	1	1	1	3

Table 2b.
Source: Source: Ordnance survey – Points of Interest (© Crown copyright and database rights 2019 Ordnance Survey (100025252))

Descriptive Statistics and Regression Tables

Table 3:
Improvement Index statistics

Towns	Employment Rate Change (2001–2011)	Youth Population Rate Change (2001–2011)	Business Count Change (2010–2016)	Population Change (2001–2011)	Further Education Qualification Rate Change (2001–2011)
Aberdare	3.40	0.21	70	119	3.03
Abergavenny	3.50	0.04	65	618	13.72
Abertillery	3.73	0.39	35	-120	-0.03
Aberystwyth	-3.11	4.22	-30	1976	-28.00
Ammanford	7.13	0.11	0	459	-8.00
Bangor	-6.71	3.20	25	2654	-21.98
Barry	1.85	-0.01	140	2464	-4.56
Bridgend	1.90	0.17	155	8003	0.18
Bryn Pydew	3.07	0.57	75	497	17.29
Buckley	1.14	0.06	235	1879	4.42
Carmarthen	4.39	0.05	75	1429	9.49
Chepstow	0.59	0.57	85	411	7.57
Church Village	0.08	-0.32	115	625	5.89
Cil-Y-Coed	0.17	0.08	50	-170	-7.50
Colwyn Bay	3.49	-0.28	80	2376	13.51
Ebbw Vale	3.82	0.13	45	-51	3.38
Flint	2.36	-0.25	90	474	8.13
Gorseinon	3.40	-0.77	-5	823	1.71
Haverfordwest	7.51	-0.42	-15	918	2.66
Holyhead	4.86	0.10	10	185	1.83

Kinmel Bay/Abergele	2.91	0.47	70	1157	5.43
Llandudno	4.89	0.15	60	505	8.35
Llanelli	7.29	0.40	110	3278	-0.80
Llantrisant	4.09	-0.28	170	3235	15.44
Llantwit Major	-1.61	0.53	40	-338	1.57
Maesteg	0.74	0.07	15	-90	5.19
Merthyr Tydfil	8.16	-0.32	160	2873	3.86
Milford Haven	5.21	0.13	15	821	3.29
Mold	0.17	0.08	70	490	3.48
Monmouth	3.17	0.63	25	1631	8.41
Mountain Ash	3.51	-0.03	15	-141	7.86
Newtown (Powys)	-1.05	0.28	-50	574	0.69
Porthcawl	2.99	0.37	170	136	8.13
Pyle	4.66	-0.55	25	1212	7.62
Rhosllanerchrugog	3.40	-0.12	50	1415	10.91
Rhyl/Prestatyn	2.28	0.38	130	-171	3.77
Tonypandy	4.56	-0.07	95	-1870	2.43
Tredegar	2.88	0.31	25	46	4.45
Treharris	4.37	-0.01	30	-40	3.10
Wrexham	2.95	-0.64	80	3198	2.44

Table 3.
Source: Census 2011, Census 2001, Office for National Statistics – Business Register and Employment Survey; UK Business: Activity, Size and Location; Built-up Areas Boundaries, V2; Mid-Year Population Estimates

Regression Tables
Table 4:

OLS Public Services

Predictors	Health Services Estimates	CI	p	Bus Stops Estimates	CI	p	Nurseries Estimates	CI	p	Schools Estimates	CI	p	GPs Estimates	CI	p	Post Boxes Estimates	CI	p
Intercept	19.09	5.32 – 32.86	**0.007**	-76.92	-117.13 – -36.71	**<0.001**	7.34	4.92 – 9.77	**<0.001**	-0.73	-2.98 – 1.52	0.525	-2.79	-4.19 – -1.39	**<0.001**	14.69	4.91 – 24.47	**0.003**
Improvement Index	-0.34	-1.14 – 0.46	0.401	-2.04	-4.37 – 0.29	0.087	0.04	-0.10 – 0.18	0.614	-0.11	-0.24 – 0.02	0.094	-0.08	-0.16 – 0.00	0.057	-0.15	-0.71 – 0.42	0.610
Distance from City	0.28	0.20 – 0.37	**<0.001**	0.39	0.14 – 0.64	**0.002**	0.01	-0.00 – 0.03	0.065	-0.02	-0.03 – -0.01	**0.006**	-0.00	-0.01 – 0.01	0.672	0.18	0.12 – 0.25	**<0.001**
Population	0.00	0.00 – 0.00	**<0.001**	0.00	0.00 – 0.00	**<0.001**	0.00	0.00 – 0.00	**<0.001**	0.00	0.00 – 0.00	**<0.001**	0.00	0.00 – 0.00	**<0.001**	0.00	0.00 – 0.00	**<0.001**
Land Area	-1.50	-2.16 – -0.84	**<0.001**	10.10	8.17 – 12.03	**<0.001**	-0.05	-0.16 – 0.07	0.437	0.21	0.10 – 0.32	**<0.001**	0.06	-0.00 – 0.13	0.060	0.23	-0.24 – 0.70	0.342
Household Deprivation	-0.58	-0.80 – -0.35	**<0.001**	0.99	0.32 – 1.66	**0.004**	-0.15	-0.19 – -0.11	**<0.001**	0.02	-0.02 – 0.06	0.264	0.04	0.02 – 0.07	**<0.001**	-0.28	-0.44 – -0.12	**0.001**
Wales Dummy	-2.63	-8.53 – 3.28	0.384	21.29	4.06 – 38.53	**0.016**	-0.76	-1.81 – 0.28	0.150	1.64	0.68 – 2.61	**0.001**	0.77	0.17 – 1.37	**0.013**	3.74	-0.45 – 7.93	0.081
Job Density	15.86	9.77 – 21.95	**<0.001**	-2.45	-20.23 – 15.32	0.787	1.35	0.28 – 2.42	**0.014**	1.05	0.06 – 2.05	**0.038**	-0.36	-0.98 – 0.26	0.257	1.08	-3.24 – 5.40	0.625
Observations	516			516			516			516			516			516		
R² / adjusted R²	0.908 / 0.907			0.910 / 0.909			0.903 / 0.902			0.929 / 0.928			0.890 / 0.889			0.870 / 0.868		

Table 4
Source: Census 2011, Office for National Statistics – Business Register and Employment Survey; UK Business: Activity, Size and Location; Built-up Areas Boundaries, V2; Mid-Year Population Estimates; Ordnance survey – Points of Interest (© Crown copyright and database rights 2019 Ordnance Survey (100025252)); Scotland's Census, 2011; National Records of Scotland – Mid-Year Population Estimates;.

Table 5:

Logistic Regression of Public Services availability

Predictors	Mental Health Practitioners Odds Ratios	CI	p	Hospital Odds Ratios	CI	p	Job Centre Odds Ratios	CI	p	Train Station Odds Ratios	CI	p	Further Education College Odds Ratios	CI	p	Police Station Odds Ratios	CI	p
Intercept	5.93	0.94 – 37.53	0.059	0.04	0.01 – 0.26	**0.001**	0.00	0.00 – 0.00	**<0.001**	0.30	0.04 – 1.98	0.211	0.00	0.00 – 0.03	**<0.001**	0.07	0.01 – 0.45	**0.005**
Improvement Index	0.97	0.86 – 1.09	0.594	0.96	0.84 – 1.08	0.482	0.98	0.86 – 1.13	0.807	1.24	1.10 – 1.41	**0.001**	0.96	0.85 – 1.08	0.490	1.03	0.92 – 1.16	0.601
Distance from City	1.02	1.00 – 1.03	**0.009**	1.05	1.04 – 1.07	**<0.001**	1.02	1.00 – 1.03	**0.023**	1.01	1.00 – 1.02	0.052	1.02	1.01 – 1.03	**0.002**	1.00	0.99 – 1.01	0.891
Population	1.00	1.00 – 1.00	**<0.001**	1.00	1.00 – 1.00	**<0.001**	1.00	1.00 – 1.00	**<0.001**	1.00	1.00 – 1.00	**0.001**	1.00	1.00 – 1.00	**<0.001**	1.00	1.00 – 1.00	0.732
Land Area	0.97	0.85 – 1.10	0.610	0.91	0.80 – 1.04	0.160	1.00	0.84 – 1.19	0.962	1.03	0.89 – 1.20	0.687	0.92	0.83 – 1.03	0.149	1.17	1.01 – 1.36	**0.041**
Household Deprivation	0.93	0.90 – 0.96	**<0.001**	0.97	0.94 – 1.01	0.101	1.12	1.08 – 1.17	**<0.001**	0.98	0.95 – 1.02	0.319	1.03	1.00 – 1.07	**0.047**	1.02	0.99 – 1.06	0.109
Wales Dummy	1.60	0.72 – 3.56	0.245	1.30	0.53 – 3.19	0.568	0.93	0.39 – 2.20	0.871	2.14	0.90 – 5.11	0.086	1.17	0.55 – 2.50	0.687	0.44	0.21 – 0.91	**0.028**
Job Density	2.76	1.20 – 6.39	**0.017**	20.23	7.52 – 54.45	**<0.001**	14.18	5.36 – 37.55	**<0.001**	2.64	1.14 – 6.12	**0.023**	4.58	2.02 – 10.37	**<0.001**	5.56	2.34 – 13.25	**<0.001**
Observations	516			516			516			516			516			516		
Tjur's R²	0.230			0.397			0.439			0.254			0.331			0.154		

Table 5.
Source: Census 2011, Office for National Statistics – Business Register and Employment Survey; UK Business: Activity, Size and Location; Built-up Areas Boundaries, V2; Mid-Year Population Estimates; Ordnance survey – Points of Interest (© Crown copyright and database rights 2019 Ordnance Survey (100025252)); Scotland's Census, 2011; National Records of Scotland – Mid-Year Population Estimates;.

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