

RESEARCH Briefing paper



Beach Hut Analysis - Current tenants, beach hut waiting lists and casual users – January 2022

Summary

- In Poole nearly all tenants live in the BCP (Poole area) while in Bournemouth 89% are resident in BCP while in Christchurch only 44% of current tenants are resident in BCP.
- Mosaic analysis of beach hut tenants resident in BCP reveals the majority are found to be in the more affluent Mosaic Groups including some retired groups.
- The Index of Multiple Deprivation (IMD) was used to analyse all postcodes as this covers England. This identified that a large number of current tenants live in the least deprived areas across England.
- Both the Mosaic and IMD data confirmed that Poole and Christchurch were polarised towards the more affluent groups and least deprived areas compared with those with beach huts in Bournemouth. However, Bournemouth still had a significant proportion of tenants in the more affluent Mosaic Groups.
- The waiting list analysis shows a similar pattern to the tenant data in terms of Mosaic characteristics and deprivation decile.
- Casual bookings indicate that those who have booked for more than one period have a preference for the same locality.

Background

Postcode data has been provided by the Destination and Culture Team. This includes current beach hut tenants, those on waiting lists and casual bookings.

The data on current tenants and waiting lists is split by the three preceding authorities as the systems are still run separately with differing terms and conditions. Please note there is no beach hut waiting list for Christchurch.

Current Tenants

Table 1 illustrates the number of current beach hut tenants by preceding authority and locality with a valid postcode on the database. In the case of the Bournemouth data only those registered in the current year are shown to be consistent with the Poole and Christchurch records. The numbers should broadly match with the number of beach huts available.

Table 1 – Number of current tenants by locality of beach hut and preceding authority

| Locality and preceding authority | Current tenants |
|---|------------------------|
| Bournemouth | 1,579 |
| Alum Chine | 176 |
| Boscombe East | 507 |
| Boscombe West | 45 |
| Bournemouth East | 109 |
| Bournemouth West | 73 |
| Durley Chine | 201 |
| Fisherman's Walk | 320 |
| Southbourne | 148 |
| Christchurch | 517 |
| Friars Cliff | 158 |
| Gundimore | 11 |
| Mudeford | 348 |
| Poole | 1,194 |
| Branksome Chine | 352 |
| Branksome Dene | 111 |
| Canford Cliffs | 165 |
| Flaghead | 74 |
| Hamworthy | 130 |
| Sandbanks | 193 |
| Shore Road | 169 |
| Total | 3,290 |

There are some key differences between the three authorities and their terms and conditions, while only Poole residents are eligible for a Poole beach hut this is not the case in Christchurch and Bournemouth where residents from outside the local area can be beach hut tenants.

The postcodes have been matched to regions and local authority areas. Of 3,290 postcodes listed 2,812 (85%) are in the BCP area. A further 250 postcodes are in the South East (including 97 in New Forest), 93 in Dorset and 41 in London. The rest are spread across other regions including the South West.

Christchurch appears to have the biggest proportion of current tenants outside of BCP. Of 517 listed only 229 (44%) have a BCP postcode with 197 in the South East (including 70 in the New Forest) and 26 in London.

In Bournemouth 1,408 (89%) of the 1,579 are in BCP with 53 postcodes in the South East and 15 in London with 25 in postcodes outside the South West.

In Poole 1,175 (98%) of the 1,194 postcodes are in the BCP area with one listed in Dorset and 18 with the postcodes not recognised.

Mosaic Analysis of current tenants

Mosaic is a geodemographic classification system that uses over 850 million pieces of information across 450 data points using the latest analytical techniques to identify 15 different groups and 66 detailed types. The data presented here just includes information about the Mosaic Group. Combined with customer data it provides a useful insight into resident's preferences and likely characteristics although the postcode level data will cover a number of households so is only indicative.

The Mosaic data is only available for postcodes in BCP, and Dorset so as shown in the previous section there are 2,905 postcodes in BCP and Dorset which accounts for 88% of all postcodes with 385 postcodes outside BCP and Dorset which cannot therefore be matched with a Mosaic Group.

The following charts just represent the postcodes of tenants resident in the BCP area. The total numbers differ slightly from those reported above due to postcode matching to the different datasets. The locality in chart one and two refers to the location of beach hut not the location of the resident's postcode.

Chart 1 Current tenants resident in BCP by Mosaic Group

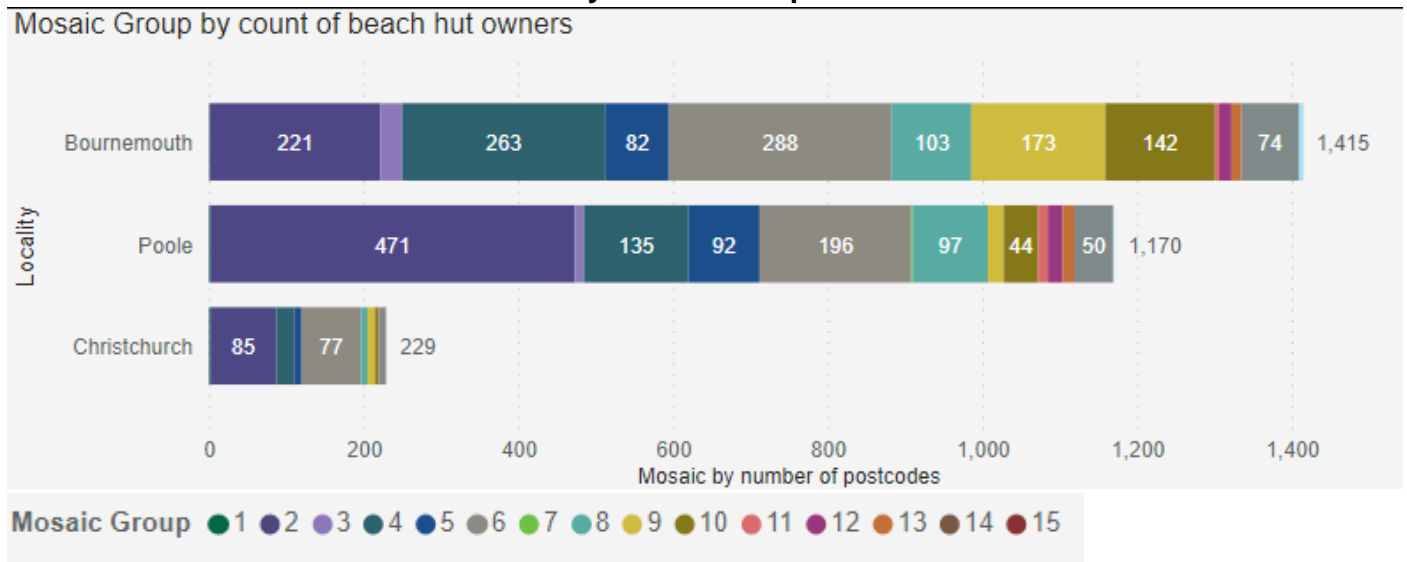


Chart 2 Current tenants resident in BCP by Mosaic Group by percentage

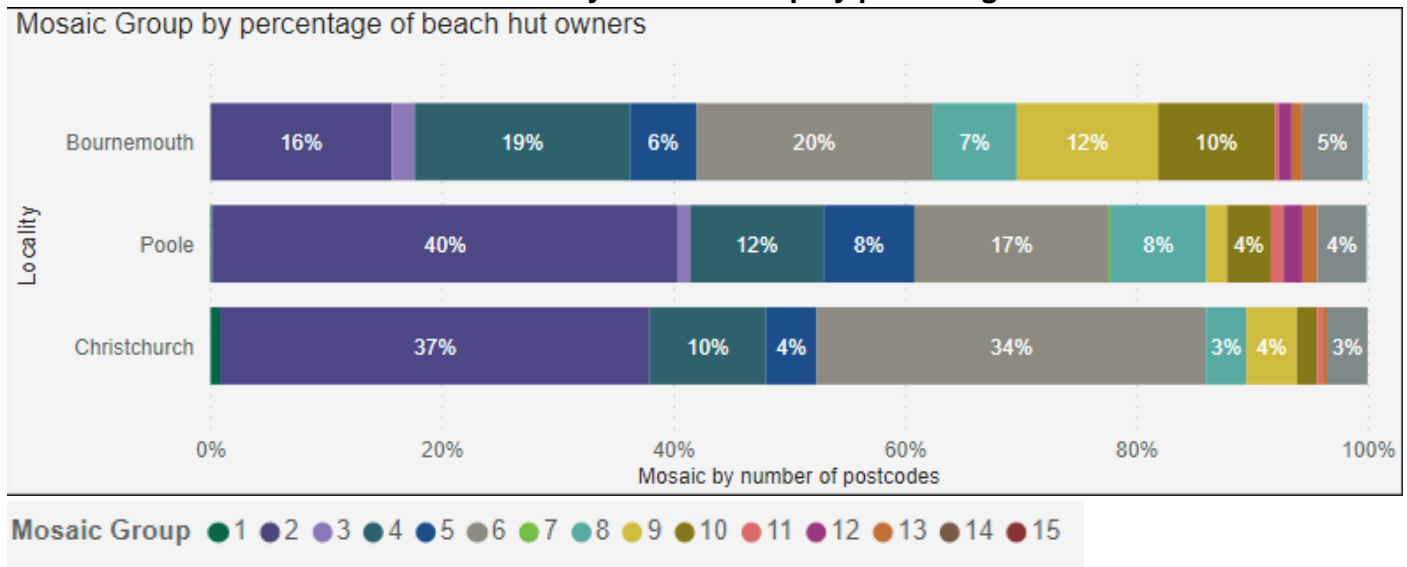
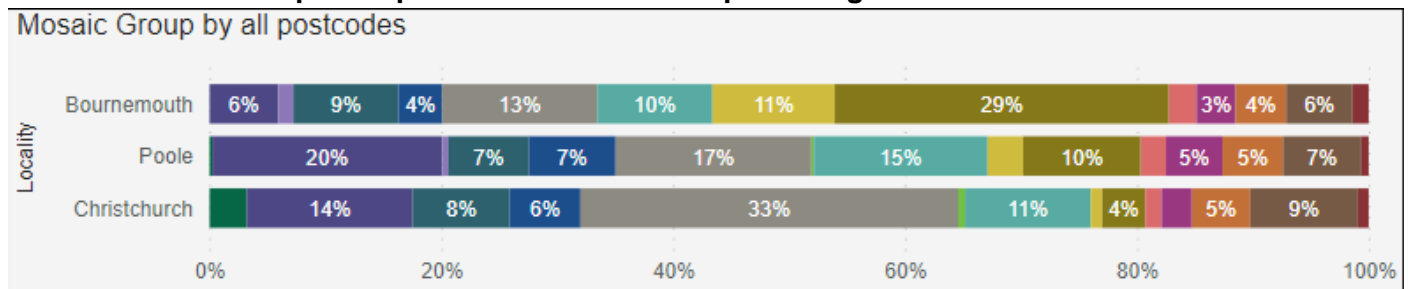


Chart 3 Mosaic Group in all postcodes across BCP preceding authorities



In terms of numbers of Mosaic types there are significant numbers across Bournemouth, Christchurch, and Poole in the Prestige Positions (B) and Senior Security (F). There also significant percentages in the Domestic Success group (D) and in Bournemouth in Urban Cohesion (I) and Rental Hubs (J). Details on these groups is shown in Table 5 with the colour coding.

Table 4 compares the pattern of beach hut tenants with the pattern of postcode Mosaic Groups across BCP Council area using a location quotient. This compares the percentage of tenants postcode groups with the percentage groups of all postcodes across BCP. Any number over 100 shows that Group is over-represented compared to the BCP overall figures. However, its necessary to also look at the number of postcodes represented by tenants as even though that group may be over-represented there may only be a small number of postcodes, for example group C City Prosperity. In table 5 those in red are the over-represented groups.

The analysis shows that the more affluent groups are over-represented in terms of beach hut tenants.

Table 4 Mosaic Types by Location Quotient

| Location Quotient | | | | |
|-----------------------|-------------|--------------|-------|-------|
| | Bournemouth | Christchurch | Poole | Total |
| A Country Living | N/A | 27 | 60 | 30 |
| B Prestige Positions | 262 | 259 | 203 | 225 |
| C City Prosperity | 151 | N/A | 191 | 171 |
| D Domestic Success | 206 | 120 | 167 | 184 |
| E Suburban Stability | 152 | 71 | 105 | 119 |
| F Senior Security | 153 | 103 | 99 | 114 |
| G Rural Reality | 0 | 0 | 77 | 38 |
| H Aspiring Homemakers | 73 | 32 | 55 | 62 |
| I Urban Cohesion | 116 | 434 | 59 | 114 |
| J Rental Hubs | 35 | 47 | 37 | 37 |
| K Modest Traditions | 15 | 31 | 51 | 31 |
| L Transient Renters | 34 | 0 | 33 | 33 |
| M Family Basics | 21 | 9 | 25 | 22 |
| N Vintage Value | 92 | 38 | 63 | 71 |
| O Municipal Tenants | 30 | 0 | 14 | 24 |

Table 5 Mosaic Group descriptions

| Group | Group Name | Description | Key Features |
|--------|---------------------|--|---|
| A (1) | Country Living | Well-off owners in rural locations enjoying the benefits of country life | Rural locations, Own old, detached houses, Electronic money transfers, Garden or allotment, Oil central heating, High environmental impact gap |
| B (2) | Prestige Positions | Established families in large detached homes living upmarket lifestyles | Own large, detached houses, Highly educated, High discretionary income, Garden or allotment, Pay credit cards in full, Breakdown cover |
| C (3) | City Prosperity | High status city dwellers living in central locations and pursuing careers with high rewards | Urban areas, High value flats, High income, Cosmopolitan lifestyles, High-tech homes, Uber passengers |
| D (4) | Domestic Success | Thriving families who are busy bringing up children and following careers | Families with children, Mid to high household income, Monthly discretionary income under £1000, Very high mortgage debt, Internet via smartphone, Online shoppers |
| E (5) | Suburban Stability | Mature suburban owners living settled lives in mid-range housing | Older families, no children, Own mid-value semis, 3 bedrooms, Established in community, News and media sites, Solar panels |
| F (6) | Senior Security | Elderly people with assets who are enjoying a comfortable retirement | Retired singles and couples, Pre-war generation, Established in community, Low internet use, Have wills, Solar panels |
| G (7) | Rural Reality | Householders living in less expensive homes in village communities | Rural areas, Oil/solid fuel central heating, Internet at home, Free mobile phone apps, Watch TV, Comprehensive car insurance |
| H (8) | Aspiring Homemakers | Younger households settling down in housing priced within their means | Families with young children, 3 bedrooms, High outstanding mortgages, Internet via smartphone, Texts and photos on smartphone, Order from takeaways |
| I (9) | Urban Cohesion | Residents of settled urban communities with a strong sense of identity | Homesharers in terraces, Uber passengers, Free mobile phone apps, Read news and shop online, Visual arts and design sites, Watch TV |
| J (10) | Rental Hubs | Educated young people privately renting in urban neighbourhoods | Young singles and homesharers, Rent flats, Very high internet use, Internet via smartphone, Watch videos online, Don't use landlines |
| K (11) | Modest Traditions | Mature homeowners of value homes enjoying stable lifestyles | Homeowners, No children, Established in community, Low discretionary income, Watch TV, Solar panels |
| L (12) | Transient Renters | Single people renting low cost homes for the short term | Young singles and homesharers, Millennials, Rent low value terraces, Internet via smartphone, High social networking, Don't use landlines |
| M (13) | Family Basics | Families with limited resources who budget to make ends meet | Families with lots of children, Council/HA tenants, Low discretionary income, Low affluence, Internet via smartphone, Games consoles |
| N (14) | Vintage Value | Elderly people with limited pension income, mostly living alone | Retired singles, Council/HA tenants, No qualifications, Low discretionary income, Low-tech households, Fuel and water poverty |
| O (15) | Municipal Tenants | Urban residents renting high density housing from social landlords | Council/HA flats, Densely populated, No qualifications, Low discretionary income, Low environmental impact gap, Fuel poverty |

Index of Multiple Deprivation (IMD) 2019

As the Mosaic data only includes local postcodes data the postcodes for the Index of Multiple Deprivation have also been included to cover all tenant postcodes where there is a postcode match.

Table 6 Postcodes matched to IMD Decile

| IMD Decile | BCP | Bournemouth | Christchurch | Poole |
|---------------------------------------|-------|-------------|--------------|-------|
| 1 (most deprived) | 20 | 19 | - | 1 |
| 2 | 85 | 72 | 2 | 11 |
| 3 | 81 | 43 | 4 | 34 |
| 4 | 203 | 139 | 14 | 50 |
| 5 | 290 | 173 | 35 | 82 |
| 6 | 315 | 204 | 30 | 81 |
| 7 | 453 | 190 | 61 | 202 |
| 8 | 438 | 280 | 77 | 81 |
| 9 | 637 | 272 | 130 | 235 |
| 10 (least deprived) | 736 | 177 | 160 | 399 |
| Total matched tenant postcodes | 3,258 | 1,569 | 513 | 1,176 |
| Percentage in 20% most deprived areas | 3.2% | 5.8% | 0.4% | 1.0% |
| Percentage in 20% least deprived area | 42.1% | 28.6% | 56.5% | 53.9% |
| Percentage in 40% least deprived area | 69.5% | 58.6% | 83.4% | 78.0% |

The IMD data shows that across all the BCP beach huts only 3% of current tenants are resident in areas considered to be in the 20% most deprived in England. This varies across the three preceding authorities with Bournemouth with the largest percentage in the most deprived 20% although this only amounts to just under 6%. Over 83% of tenants in the Christchurch beach huts are resident in the 40% least deprived areas in England.

Beach Hut Waiting Lists Analysis

Background information on beach hut waiting lists

Lists are only open for Bournemouth and Poole with Poole applicants able to register for more than one location although there appear to be a small number of Bournemouth applicants who have registered more than once.

There are 545 addresses registered on the waiting list for Bournemouth and 2,090 in Poole. The Bournemouth waiting list has been closed for the last few years so there are fewer on the list.

The data has had duplicate addresses removed although it should be noted that it may be the case that although the address is identical the applicant may not necessarily be the same person either because different family members have applied or the person/household living at an address has changed.

After address duplicates were removed there were 519 postcodes for Bournemouth beach huts and 1,639 postcodes for Poole beach huts. These were then linked to a local authority location and to a Mosaic group and the chart below just shows those with a postcode within BCP council area. Please note that the locality refers to the location of the beach hut the applicant has applied for not the location of the resident.

Chart 4 Waiting lists in BCP by Mosaic Group (data has had duplicate applications removed)

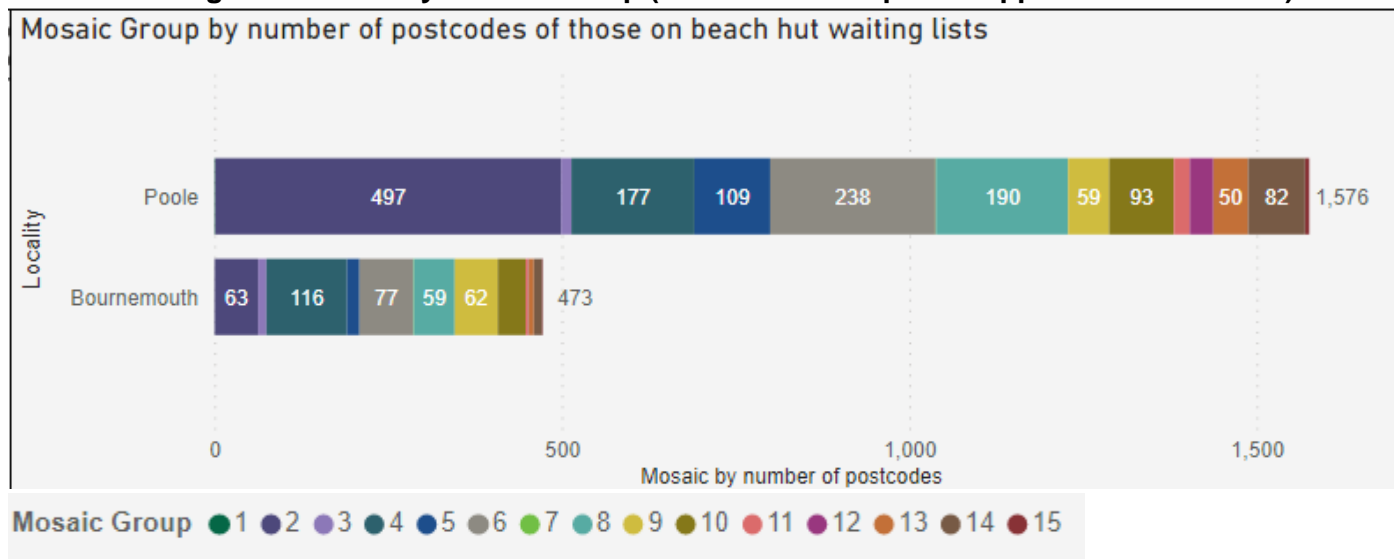
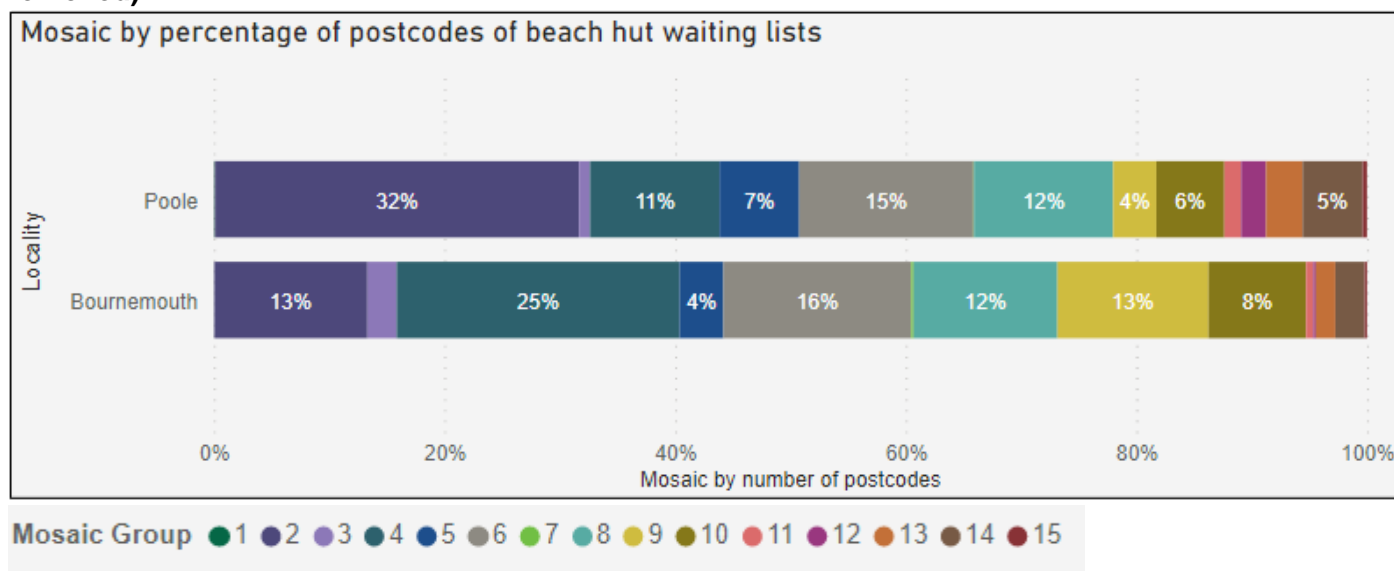


Chart 5 Waiting lists in BCP by Mosaic Group by percentage (data has had duplicate applications removed)



As is the case for tenants the waiting lists show more interest from those in the more affluent Mosaic Groups although Bournemouth has a slightly larger proportion in the Urban Cohesion group.

Index of Multiple Deprivation for Waiting List Applicants

As is the case for current beach hut tenants the waiting list postcodes have also been matched with Index of Multiple Deprivation as this covers all of England so provides more information on those applicants outside of BCP.

Chart 6 – Unique addresses on beach hut waiting lists in Bournemouth and Poole area by IMD decile (where 10 is least deprived and 1 is most deprived)

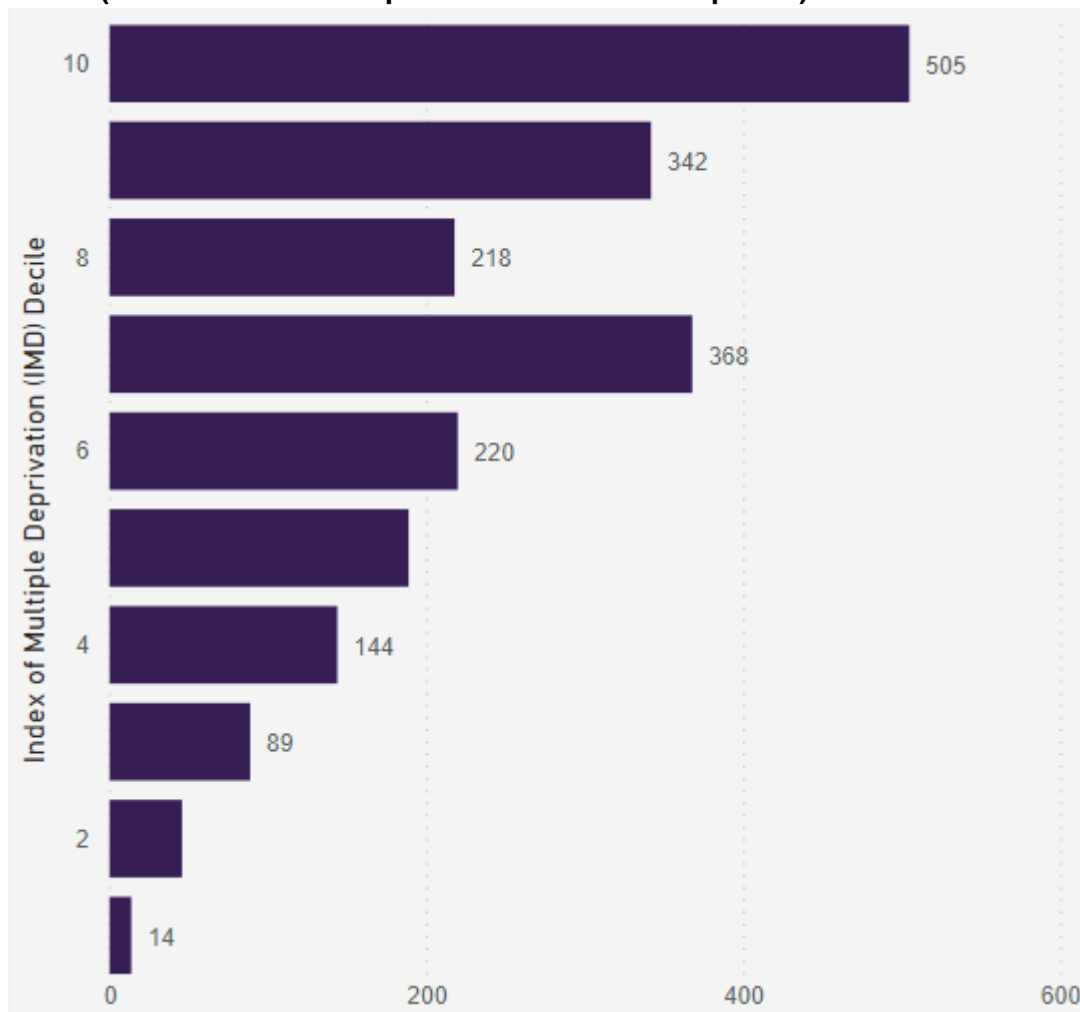


Table 7 Unique address showing number and percentage in each decile where 10 is the least deprived and 1 is the most deprived area

| Index of Multiple Deprivation (IMD) Decile | Count of Unique address | Percentage of unique address |
|--|-------------------------|------------------------------|
| 10 | 505 | 23.4% |
| 9 | 342 | 15.8% |
| 8 | 218 | 10.1% |
| 7 | 368 | 17.1% |
| 6 | 220 | 10.2% |
| 5 | 189 | 8.8% |
| 4 | 144 | 6.7% |
| 3 | 89 | 4.1% |
| 2 | 46 | 2.1% |
| 1 | 14 | 0.6% |
| Total | 2158 | 100.0% |

Chart 6 and Table 7 illustrate that like current tenants those waiting for a beach hut are more likely to be resident in less deprived areas.

Multiple Locations

Looking at the waiting lists its useful to “dedupe” the data as there are 296 addresses where residents have registered for a beach hut in more than one location. These are mainly for beach huts in Poole although there are a small number in Bournemouth who appear to have registered for more than one location.

Looking in more detail at those who have registered for more than one beach hut in Poole the majority (74%) have registered for two different locations, while 17% have registered for three locations, the remainder (9%) have registered for 4, 5 or 6 locations.

Popularity by location (Poole)

Table 8 illustrates the numbers on the waiting list by location and includes those who have registered multiple times and gives a possible indicator of popularity although this may also be determined by the number of beach huts at each location or when waiting lists were available.

Table 8 Numbers registered by location

| Locality | Numbers registered by location | Percentage |
|------------------|--------------------------------|------------|
| Bournemouth | 545 | 100.0% |
| Alum Chine | 28 | 5.1% |
| Boscombe East | 196 | 36.0% |
| Boscombe West | 14 | 2.6% |
| Bournemouth East | 25 | 4.6% |
| Bournemouth West | 64 | 11.7% |
| Durley Chine | 65 | 11.9% |
| Fisherman’s Walk | 116 | 21.3% |
| Southbourne | 37 | 6.8% |
| | | |
| Poole | 2,090 | 100.0% |
| Branksome Chine | 419 | 20.0% |
| Branksome Dene | 281 | 13.4% |
| Canford Cliffs | 315 | 15.1% |
| Flaghead | 313 | 15.0% |
| Hamworthy | 302 | 14.4% |
| Sandbanks | 195 | 9.3% |
| Shore Road | 265 | 12.7% |

Casual Beach Hut Users

Both Bournemouth and Poole preceding authority areas take casual bookings for beach huts. Data analysed in this section covers 2020 and 2021 for Poole and the 2021/22 financial year for Bournemouth. The data includes 920 bookings in Bournemouth and 404 in Poole. The records include repeat bookings. In the case of the Poole data not all records include a postcode to match the record to a local authority where the booking was registered. For the purposes of analysis, the data includes all records as well as removing duplicate addresses to understand the characteristics of those booking. The data has also been analysed to look at how many repeat bookings are made.

Once repeat bookings from the same address are removed there are 264 bookings in Poole with 147 postcodes and 755 records in Bournemouth with one without a postcode included.

Table 9 Waiting list records

| Casual Bookings | | | |
|-----------------|---------------|-------------------------|-------------------|
| | Total records | Unique location/contact | Postcode included |
| Bournemouth | 920 | 755 | 754 |
| Poole | 404 | 264 | 147 |

Table 10 Waiting list by Region, BCP and Dorset

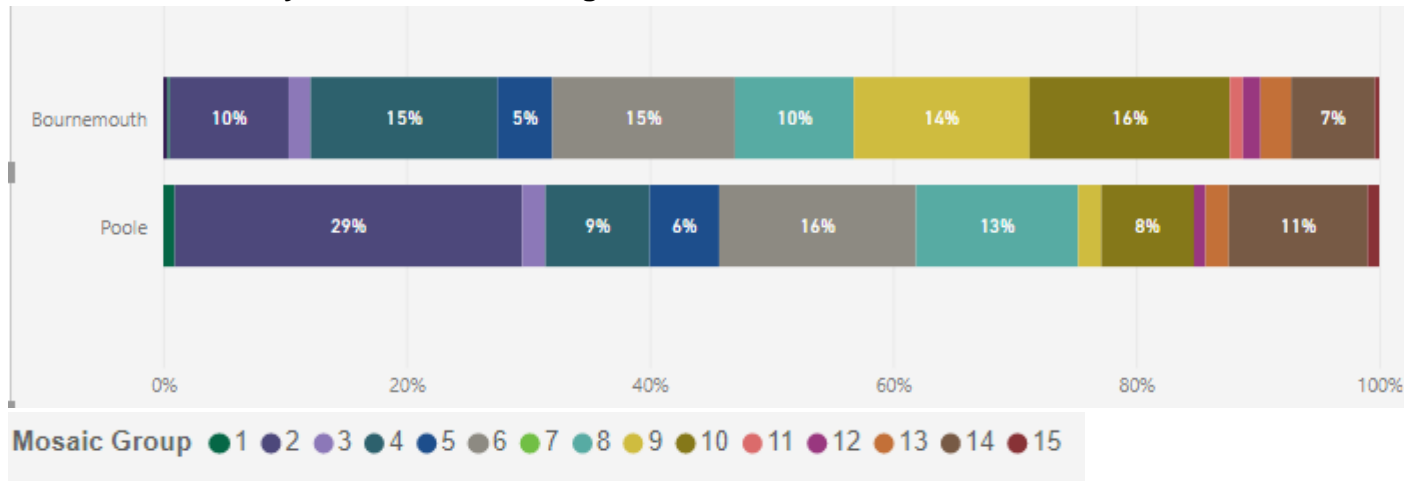
| Area | Bournemouth | | Poole | | % with records with no postcode excluded |
|--|----------------|---------------|----------------|---------------|--|
| | Unique address | % | Unique address | % | |
| East Midlands | 5 | 0.7% | 0 | 0.0% | 0.0% |
| East of England | 12 | 1.6% | 2 | 0.6% | 1.2% |
| London | 16 | 2.1% | 2 | 0.6% | 1.2% |
| North East | 1 | 0.1% | 1 | 0.3% | 0.6% |
| North West | 3 | 0.4% | 0 | 0.0% | 0.0% |
| South East | 74 | 9.8% | 21 | 6.6% | 12.3% |
| South West | 633 | 83.8% | 142 | 44.9% | 83.0% |
| BCP | 554 | 73.4% | 102 | 32.3% | 59.6% |
| Dorset | 61 | 8.1% | 39 | 12.3% | 22.8% |
| West Midlands | 9 | 1.2% | 2 | 0.6% | 1.2% |
| Yorkshire and The Humber | 0 | 0.0% | 1 | 0.3% | 0.6% |
| Location not included or postcode not included | 2 | 0.3% | 145 | 45.9% | N/A |
| Total | 755 | 100.0% | 316 | 100.0% | 100.0% |

Please note the differences in totals between table 9 and 10 is because not all fields are included in all cases so unique record counts differ

Table 10 includes data on where those booking a beach hut for a shorter period are from. In the case of Poole, a significant number of the records (46%) did not include a postcode, so the percentage split is also shown excluding these records. The Bournemouth bookings reveal that over 73% of bookings provide a BCP area postcode while the figure is just under 60% for the Poole area beach huts with a larger percentage nearly 23% providing a Dorset postcode.

Mosaic Analysis

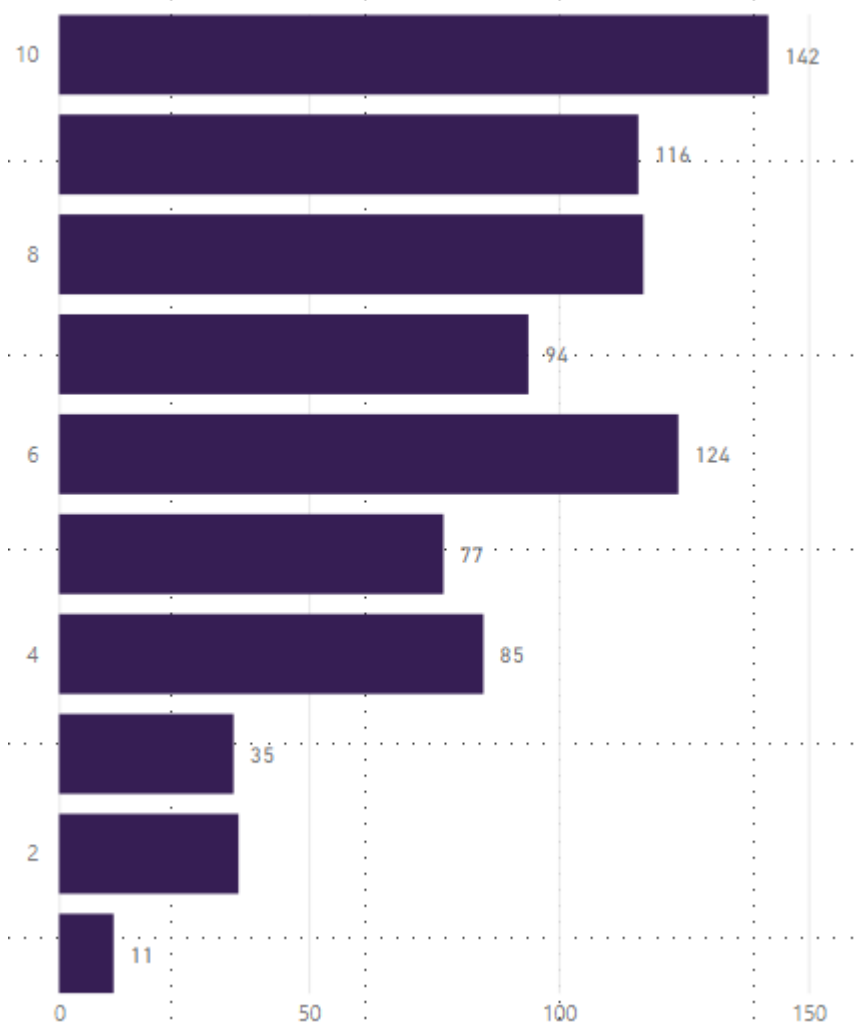
Chart 6 Mosaic analysis of casual bookings for those resident in BCP council area



The Mosaic analysis shows a similar pattern for BCP postcodes as the beach hut tenants and waiting list. The main difference is a larger percentage of those categorised as “Vintage Value” who are generally considered to be elderly on limited incomes often living alone.

Index of Multiple Deprivation for Casual bookings

Chart 7 IMD analysis using a postcode match



The IMD data in chart 7 appears to confirm the Mosaic data. Although casual bookings are still more likely to be undertaken by those resident in less deprived areas there is a larger number of postcodes in the mid-range deciles with only those in the 30% most deprived areas showing significantly smaller numbers of records. However, even in this category the percentages are larger than in the tenants and waiting list categories suggesting those beach huts booked casually are more accessible to a wider demographic. As many of the Poole postcodes are not available some care must be taken when drawing conclusions.

Repeat Bookings

The details provided enable the number of repeat bookings to be analysed in Bournemouth and Poole. Table 11 indicates that most only book one period (the length of that period hasn't been analysed). For those who made repeat bookings over the period the data available indicates that most prefer to book the same location. Reasons may include the location of the beach hut in relation to the home address or the safety of already knowing and liking a particular location rather than risking a lesser-known location and facility. The increase in "staycations" due to the pandemic may have increased numbers having to book different location in order to book for their preferred dates.

Table 11 Number of repeat bookings by matching contact details

| Number of repeat bookings | Bournemouth | | Poole | |
|---------------------------|--------------------|---------------------|--------------------|---------------------|
| | Number of bookings | Different locations | Number of bookings | Different locations |
| 1 | 628 | N/A | 189 | N/A |
| 2 | 96 | 22 | 58 | 13 |
| 3 | 24 | 7 | 21 | 8 |
| 4 | 3 | 3 | 6 | 3 |
| 5 | 5 | 3 | 1 | 1 |
| 8 | 0 | 0 | 1 | 1 |
| | 756 | 35 | 276 | 26 |

Further information

For further information regarding this report please contact the [Research & Consultation Team](#), BCP Council