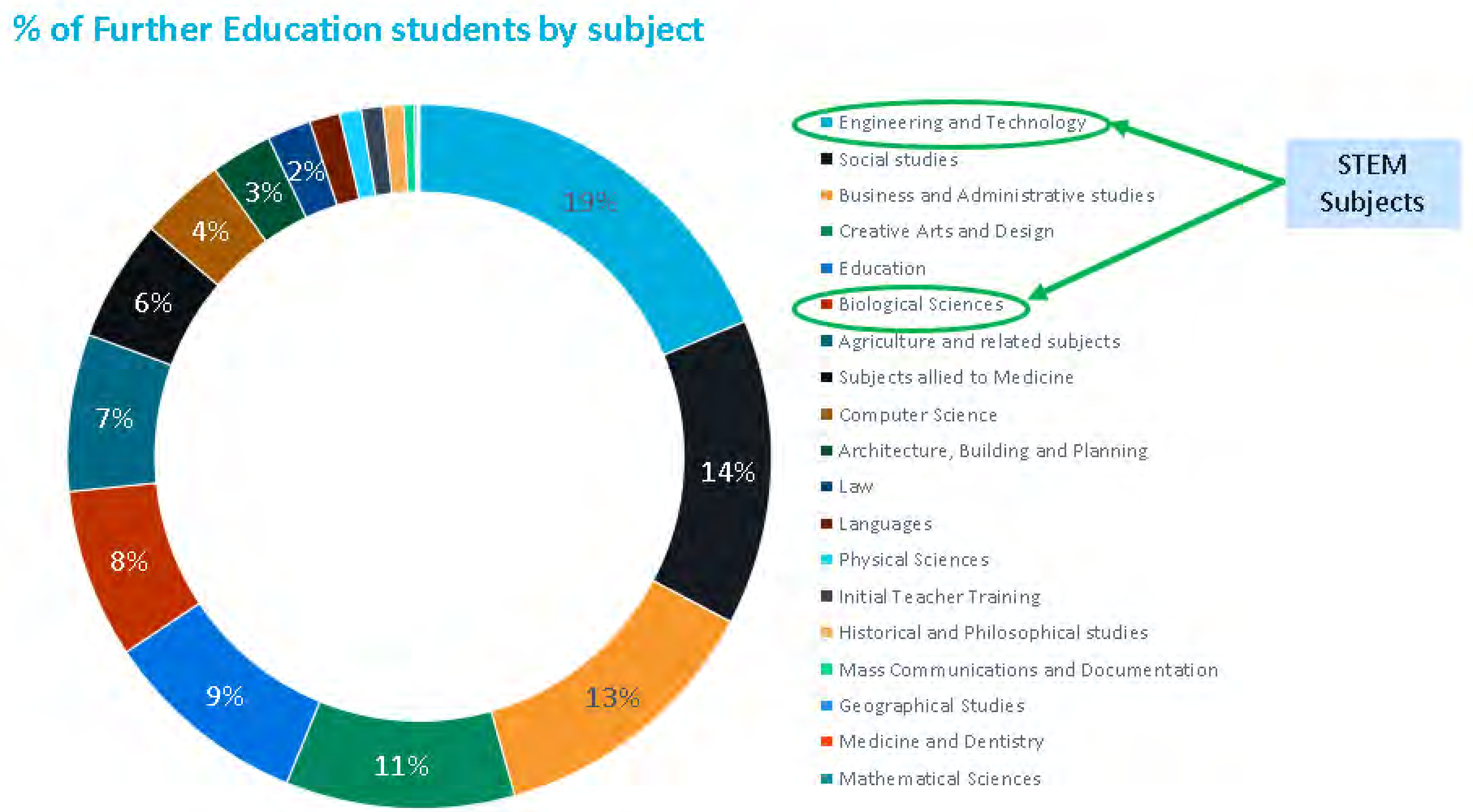
# Further Education subject of study

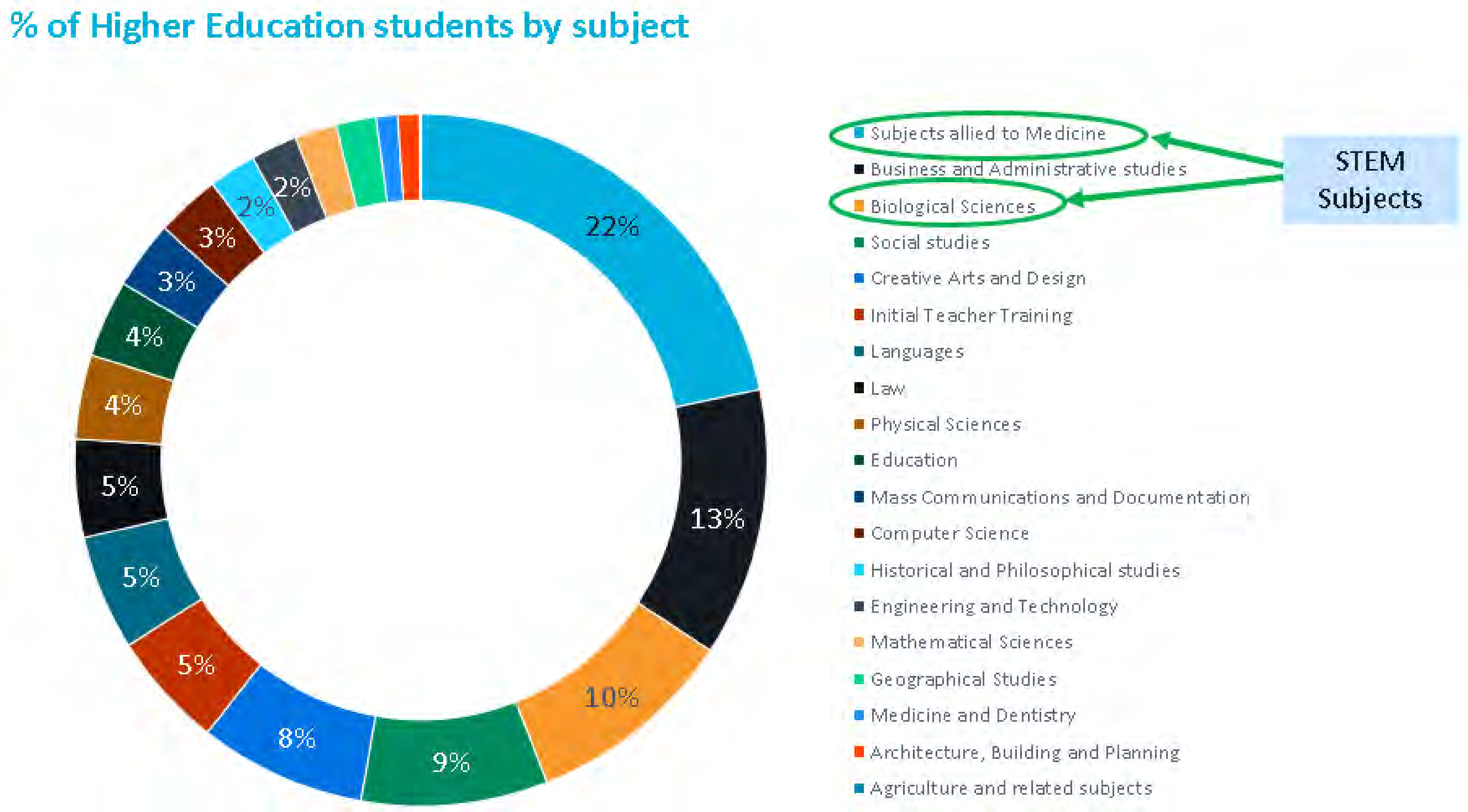
- The figure below presents the breakdown of subjects studied by Lancashire's residents at the further education level – Engineering and Technology is the biggest single subject perhaps reflecting the demand for skills from the county's large manufacturing sector. Biological Sciences is the next largest STEM subject.




Source: HEFCE, 2014/15. NB. This is the most up to date data available.

# Higher education subject of study

- The figure below presents the breakdown of subjects studied by Lancashire's residents at the higher education level. A large proportion of students chose to study STEM subjects – particularly related to Medicine and Biological Sciences.




Source: HEFCE, 2014/15. NB. This is the most up to date data available.

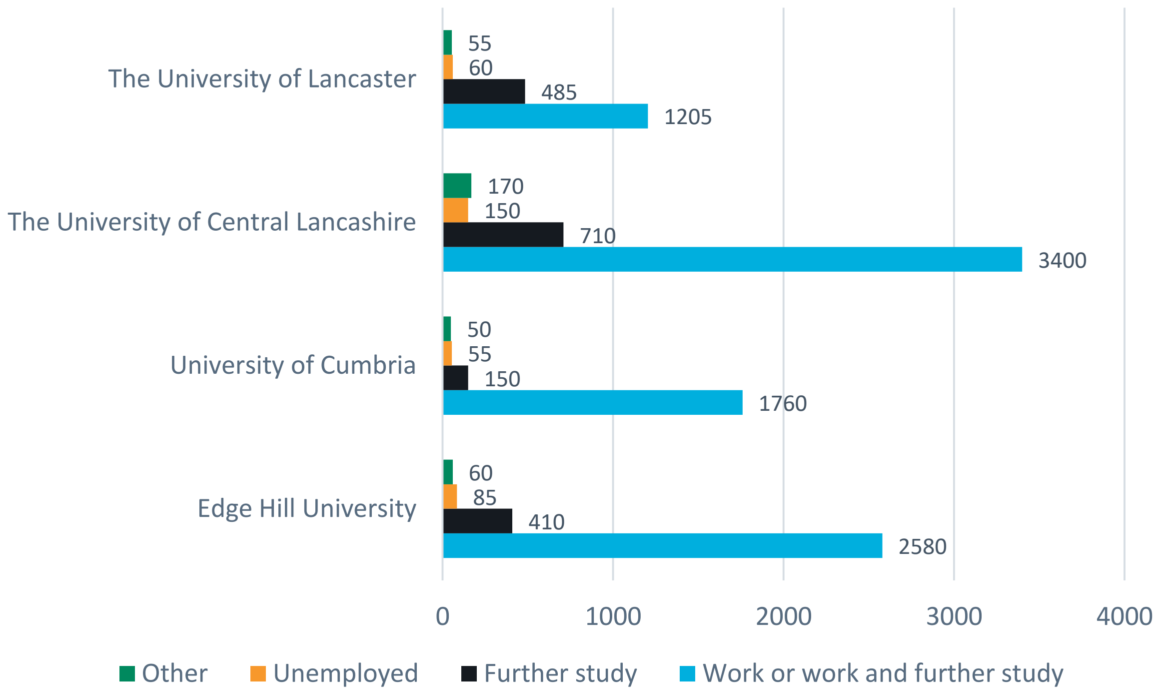
# Graduate Destinations

## University of Central Lancashire, Preston

- HESA has discontinued access to the graduate retention dataset. A recent report published by Centre for Cities provides data for UCLan.
- 69% of UCLan students in 2014/15 were from the North West (15% of these from Preston).
- 37% of young people in from Preston who chose to study at university went to UCLan, 56% went elsewhere in the North West (21% of these to Manchester).
- 2014/15 saw the 19th largest net inflow of students of UK cities, with over 12,000 more students moving in than out to study at university.
- Preston retained 22% of its graduates from 2013-15, the 27th highest rate among UK cities (London 1st at 77%, Manchester 2nd at 51%).
- Within the first 6 months of graduating, 19% of UCLan graduates were working in Manchester (the modal employment destination), 9% in Blackpool and 7% in Blackburn.
- 34% of those students who moved away from Preston to study returned for work.
- However, 87% of those who moved to Preston to study, left again straight after graduating, the 14th highest rate of UK university cities.

Source: HESA Admissions Survey 2014/15 & Destination of Leavers Survey, 2013/14–2014/15 cited by Centre for Cities

## Graduate (postgraduate and undergraduate) destinations by Higher Education providers, 2016/17

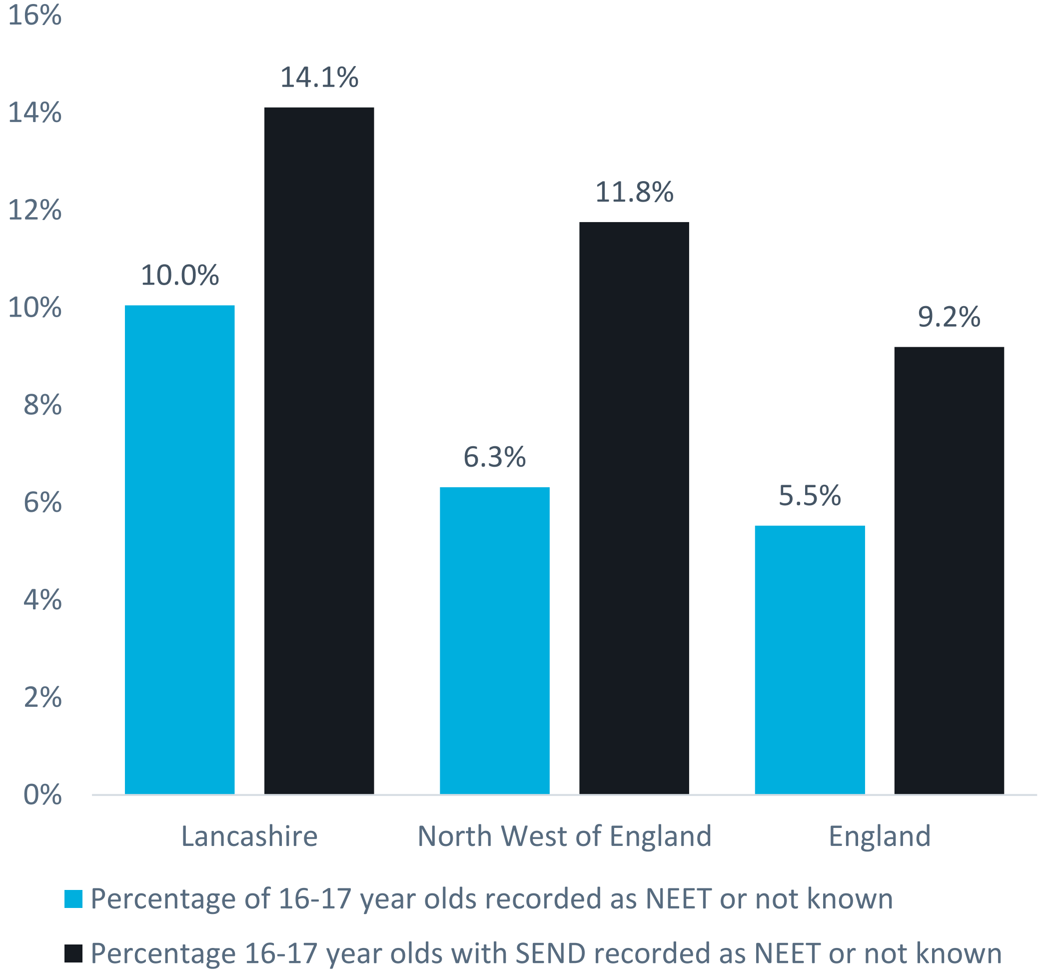



Source: HESA, 2019

- 50% of the University of Lancaster's graduates left to work full-time, the lowest out of the four universities.
- UCLan has the highest number of graduates, 4100 in 2016/17, but has the second lowest percentage of total leavers entering full-time work, 54.1%. UCLan has the highest percentage of leavers unemployed after graduating, 3.8% of total graduates.
- 64.7% of Edge Hills graduates went in to full-time work after graduating, and highest ranking of the four universities on this measure is University of Cumbria with 65.5% of graduates leaving to enter full-time work.

# Young people not in employment, education or training (NEET)

## Proportion of 16-17 year olds not in employment, education or training, 2019




Source: Department of Education, 2019

- The level of 16-17 year-olds NEET in Lancashire is 3.7 percentage points higher than the level across the North West region and 4.5 percentage points than England as a whole.
- And young people aged 16-17 with special educational needs and/or disabilities (SEND) are more likely to not be in employment, education or training than the North West or England average.

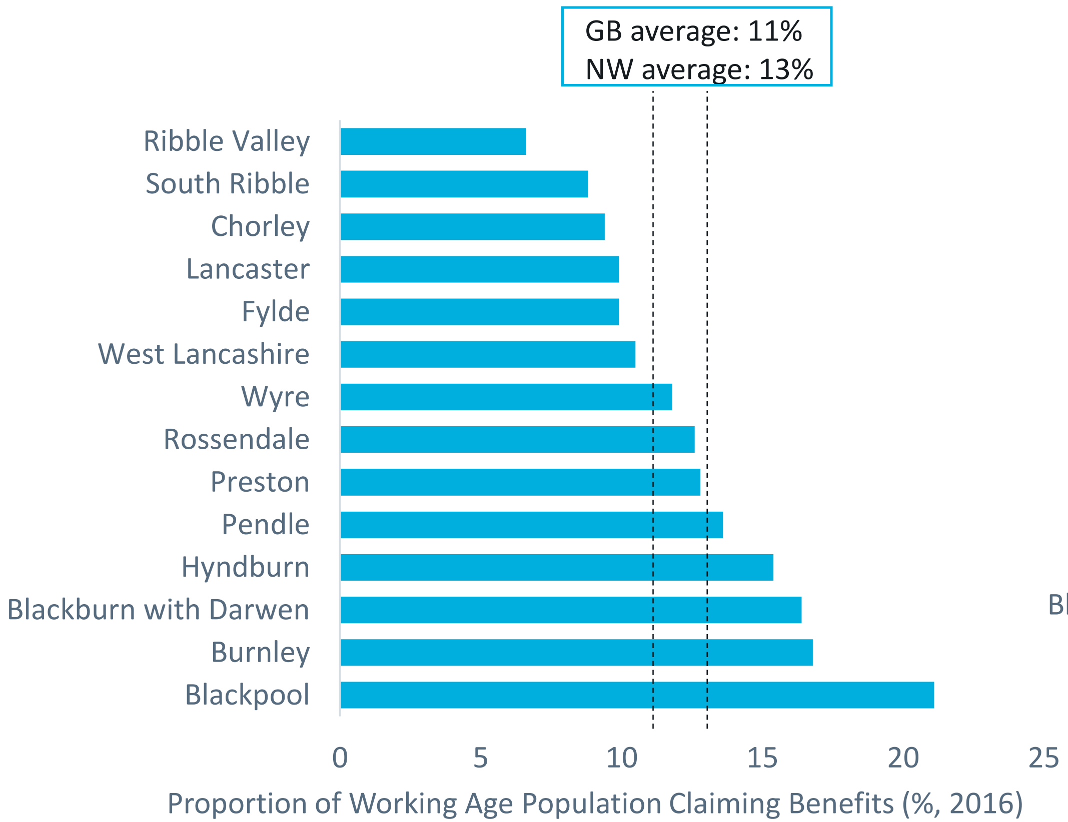
### Blackpool

- NEET data are not available for all areas within Lancashire, Blackpool data are available and show a higher level of 16-17 year-olds with special education needs and/or disabilities recorded as NEET or not known than the average for Lancashire, the North West and England.
- 14.5% of all young people aged 16-17 with special educational needs and/or disabilities in Blackpool are recorded as not in employment, education or training or as those whose activity is not known.

# Unemployment rates

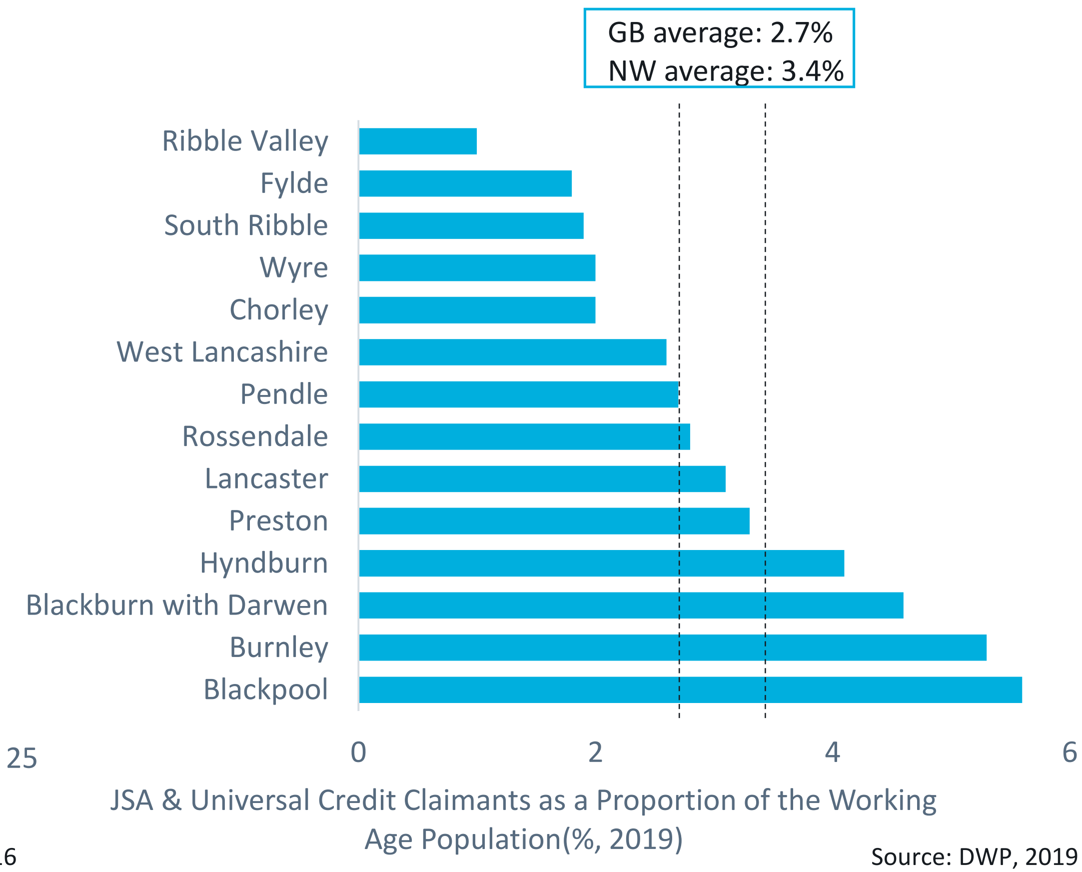
- There is significant variation in unemployment rates between Local Authority Districts in Lancashire – seven achieve rates below the national average, while seven exceed the national average.
- There is also significant variation between districts in the proportion of the population claiming benefits, with Blackpool, Burnley, Blackburn with Darwen, Hyndburn, Pendle, Preston, Rossendale, and Wyre above the national average.
- Benefit claimants data was discontinued after 2016.

**Benefit claimants, 2016**




Source: DWP, 2016

**Jobseekers, 2019**




Source: DWP, 2019

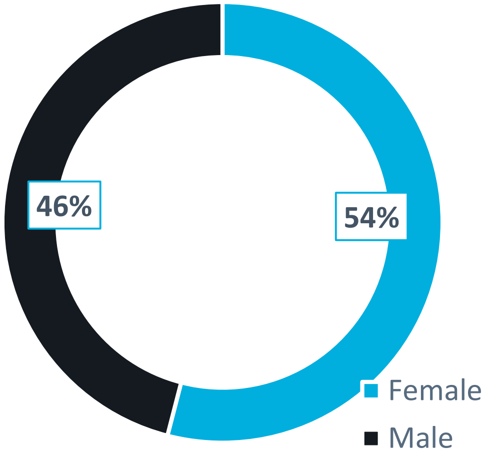
# Unemployment

In Lancashire in 2016:

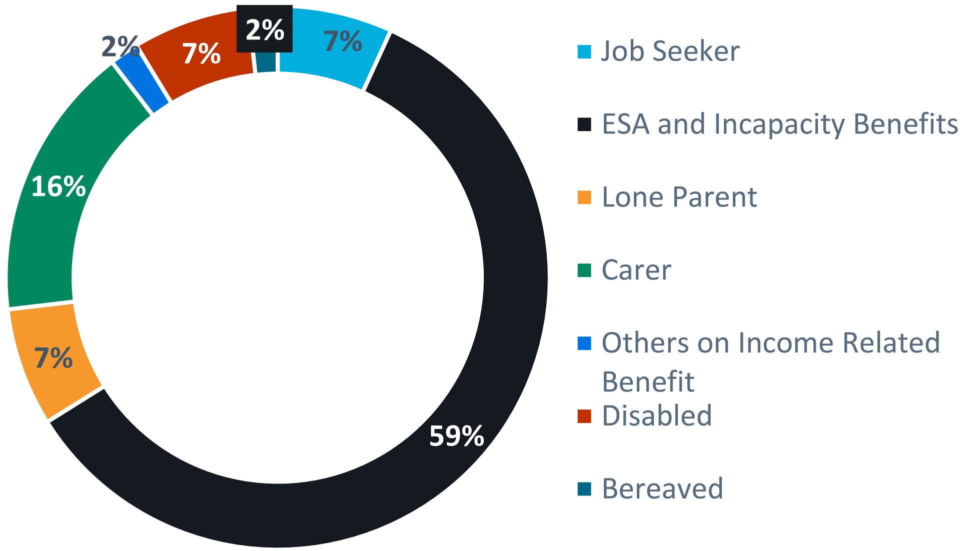
- 59% of benefit claimants were ESA/Incapacity Benefits.
- More than a quarter of all benefit claimants were between the ages of 45-54.
- More than half (54%) of all benefit claimants were women.
- 50% of benefit claimants have been claiming benefits for 5 years or more.

The above figures reflect regional and national levels.

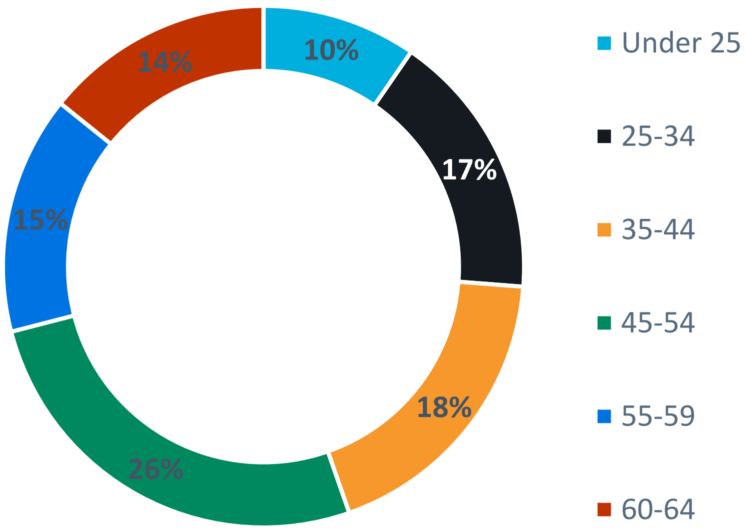
Benefit claimants in Lancashire by gender, 2016



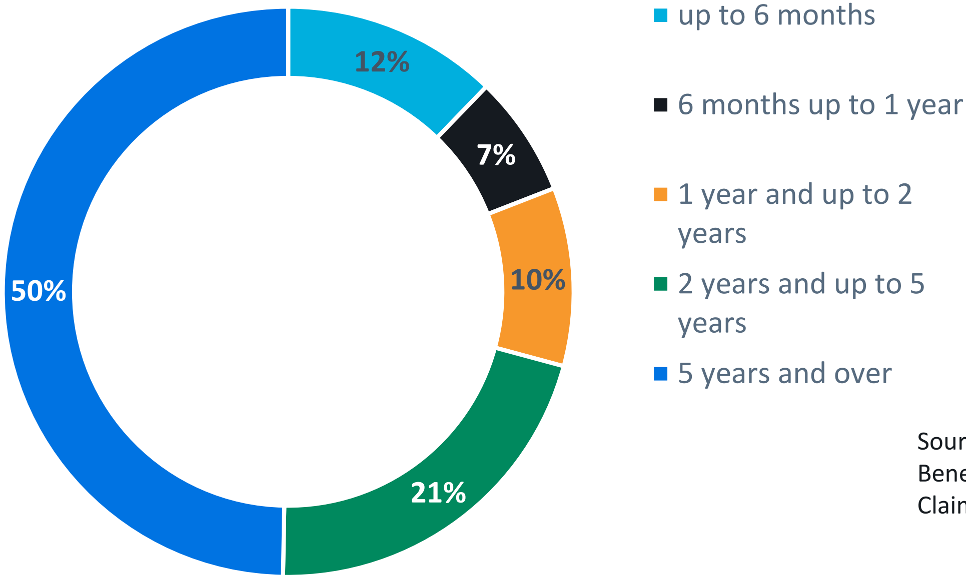

Benefit claimants in Lancashire by statistical group, 2016




Benefit claimants in Lancashire by age, 2016




Benefit claimants in Lancashire by duration, 2016




Source: ONS Benefit Claimants, 2016

# Health

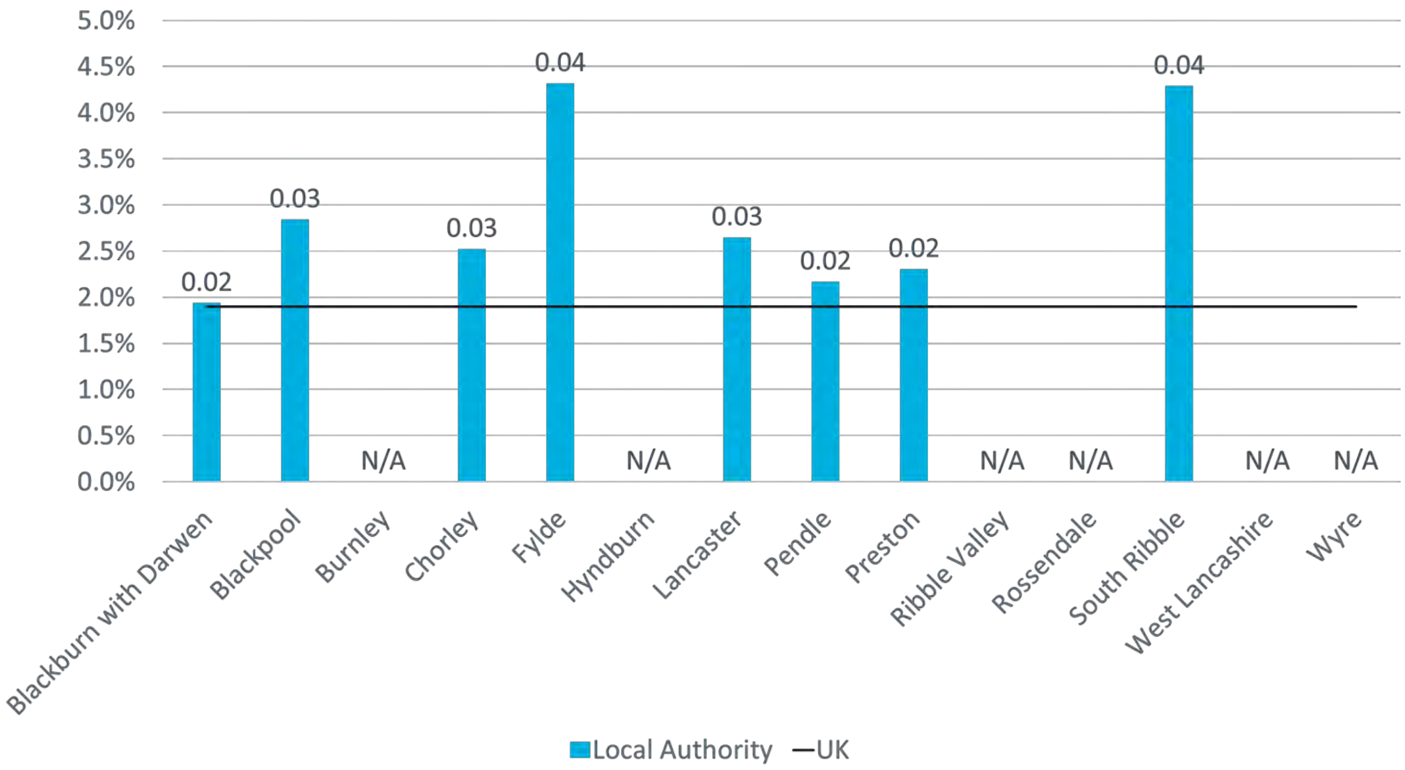
- Health has a significant impact on worker productivity and well-being. For this reason, it is import to understand the health outcomes of residents.
- With regard to healthy life expectancy at birth (i.e. the number of years a person can expect to live in good health), Lancashire underperforms in terms of its male residents compared to the national average. However, Lancashire's female residents have a longer average healthy life expectancy at birth relative to England and the North West.
- The key health Long Term Conditions which give rise to reduced Healthy Life years are: Musculoskeletal conditions, Digestive disease, COPD, Type 2 Diabetes, Emotional and mental health (Depression, UK average 9.9% of population, Lancashire 12%)(PHE), Cancer, Heart disease and stroke (CVD, UK average 38.7/ 100,000, e.g. BwD 76/ 100,000) (PHE). Many of these conditions are preventable/ manageable through positive lifestyles choices.

## Healthy life expectancy at birth

| | Male | Female |
|---|---|---|
| England | 63yrs | 64yrs |
| North West region | 61yrs | 62yrs |
| Lancashire | 61yrs | 65yrs |

Source: Public Health England, 2015-17

## Sickness Absence Rates



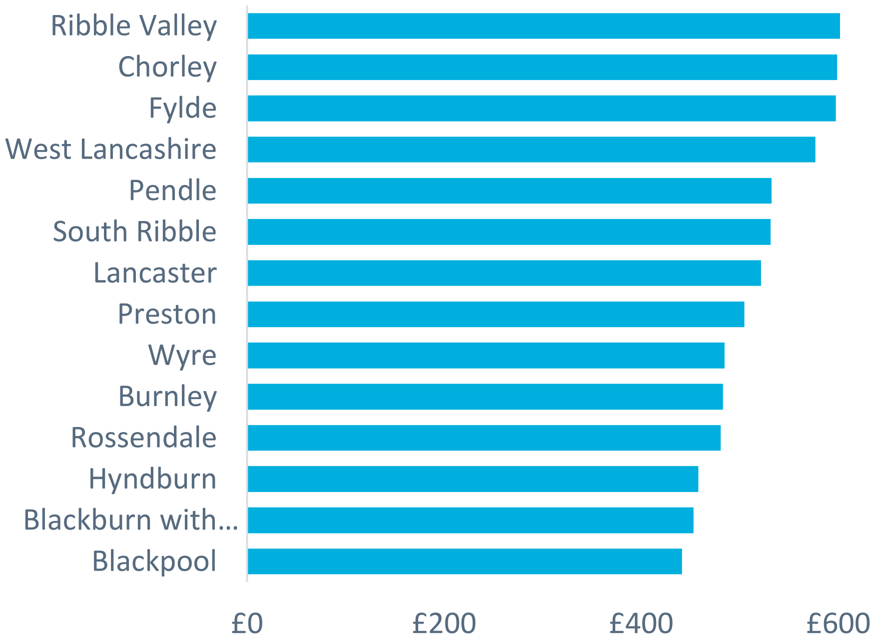

Source: ONS Sickness Absence Rate by Local Authority, 2016

- In terms of sickness absence rates, a majority of Lancashire's local authorities appear to perform worse than the UK average. Although, it should be noted that the data provide only a partial picture – they do point to a potential drag on worker productivity.

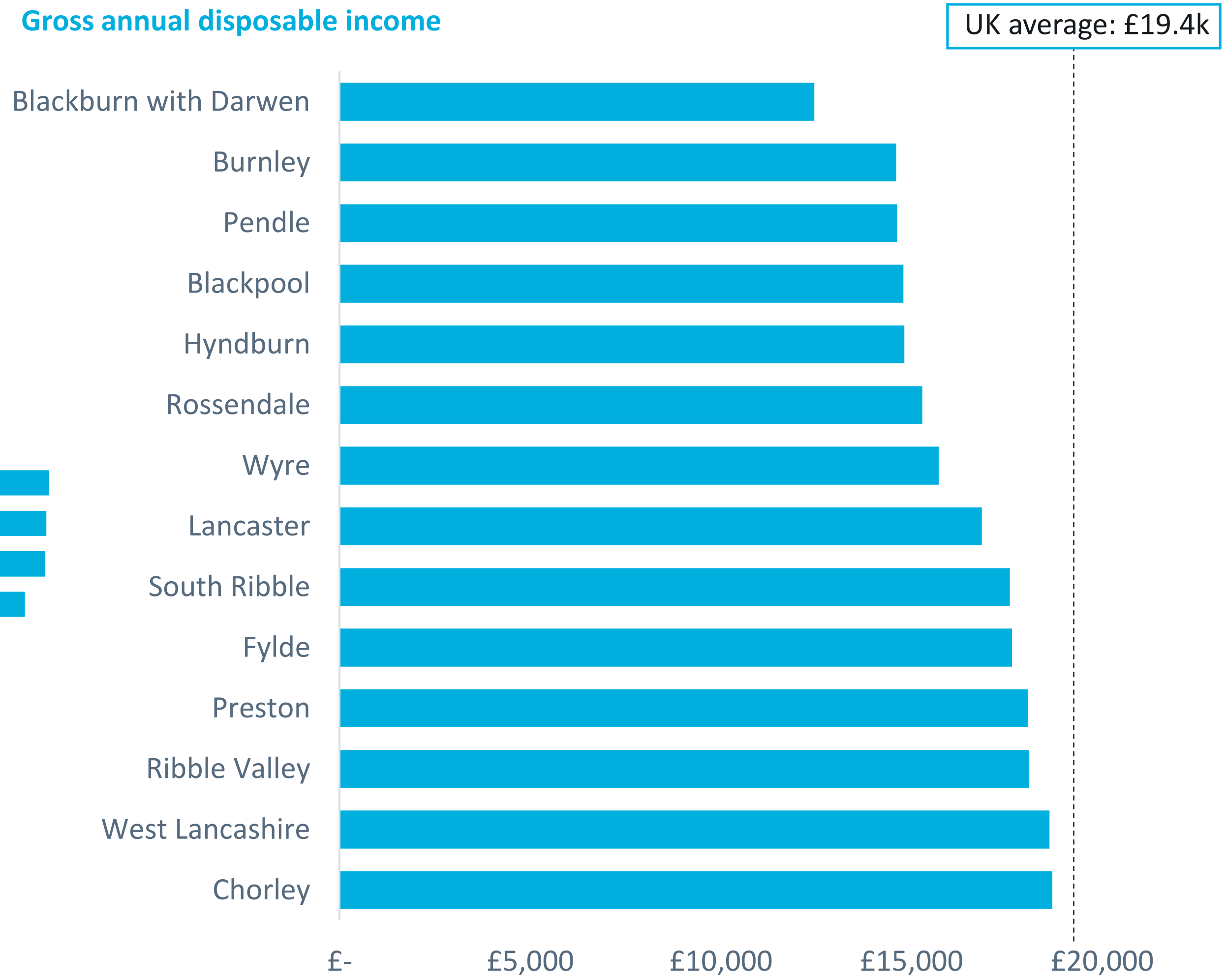
# Gross Weekly Pay and Disposable Household Income (GDHI) per person

- Average Gross Weekly Pay in Lancashire lags the UK average of £541 by £61 a week, but Ribble Valley, Chorley, Fylde, and West Lancashire exceed this level, while Pendle, South Ribble, Lancaster, Preston, Wyre, Burnley, Rossendale, Hyndburn, Blackburn with Darwen and Blackpool are below the national average.

**Average Gross Weekly Pay**




**Gross annual disposable income**




- In terms of personal disposable income, all districts are below the UK average of £19,400.

Source: Regional GDHI at current prices, 2016

# Infrastructure

# Introduction

## Outline of this section

This section draws on national and local data to outline headline evidence in relation to:

- Key transport infrastructure;
- Modes of transport for travel to work;
- Digital connectivity;
- Energy;
- Housing; and
- Land and premises.

## Key messages

- Lancashire is reliant on the road network and car travel.
- There are good north-south road links in the country but poor east-west road connectivity.
- Transport infrastructure is concentrated in the south of the county.
- Lancashire has two sea ports, which provide international connectivity, Heysham and Fleetwood, as well as access to Manchester airport.
- Digital connectivity appears to be reasonably good compared to national averages, but the lack of fibre optic network will limit economic growth without action.
- The county plays a significant role in the country’s energy infrastructure with nuclear and offshore wind production. It also has shale gas potential.
- Lack of access to the gas grid exacerbates fuel poverty in some areas.
- Housing prices are relatively affordable compared to other parts of the country – but there are wide variations within the county.
- Delivery of new housing varies across the county with Chorley exceeding targets.

# Key transport links

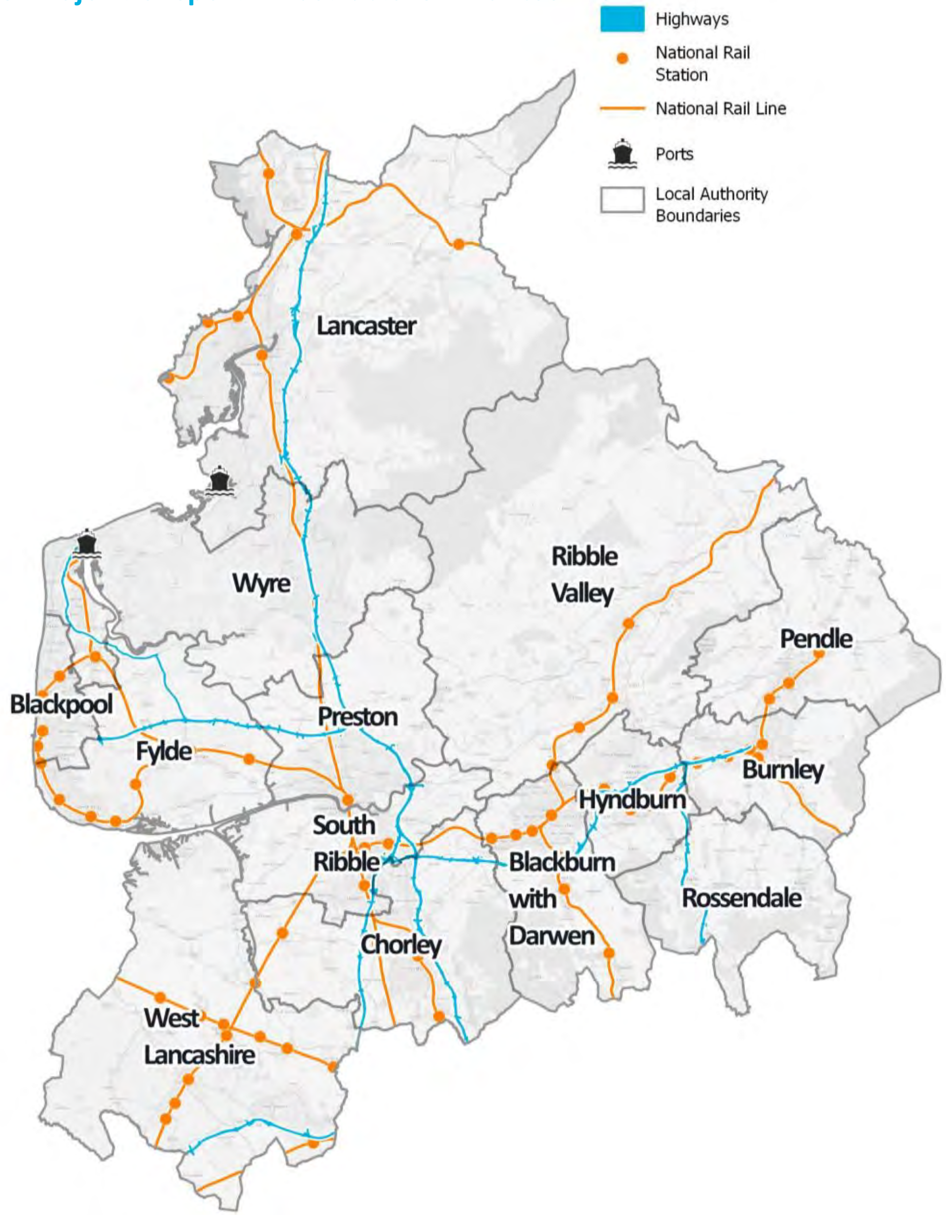
- The distribution of transport infrastructure is uneven across the county with the majority of infrastructure concentrated in the south of the county and limited highways and rail stations in the northwestern part of the county.
- Travel within the county is dominated by road and car.
- The country's road network is characterised by good north-south links and poor east-west links.
- Five of Lancaster's train stations see over 1 million passenger entries and exits per year.

| Station | Entries and exits 17/18 |
|---|---|
| Preston | 4,858,536 |
| Lancaster | 2,142,868 |
| Ormskirk | 2,006,936 |
| Blackpool North | 1,577,596 |
| Blackburn | 1,258,190 |

Source: Office of Rail and Road, 2018

- In addition to its land transport links, Lancashire has two international gateways with ports Heysham and Fleetwood.

**Map of major transport infrastructure in Lancashire**

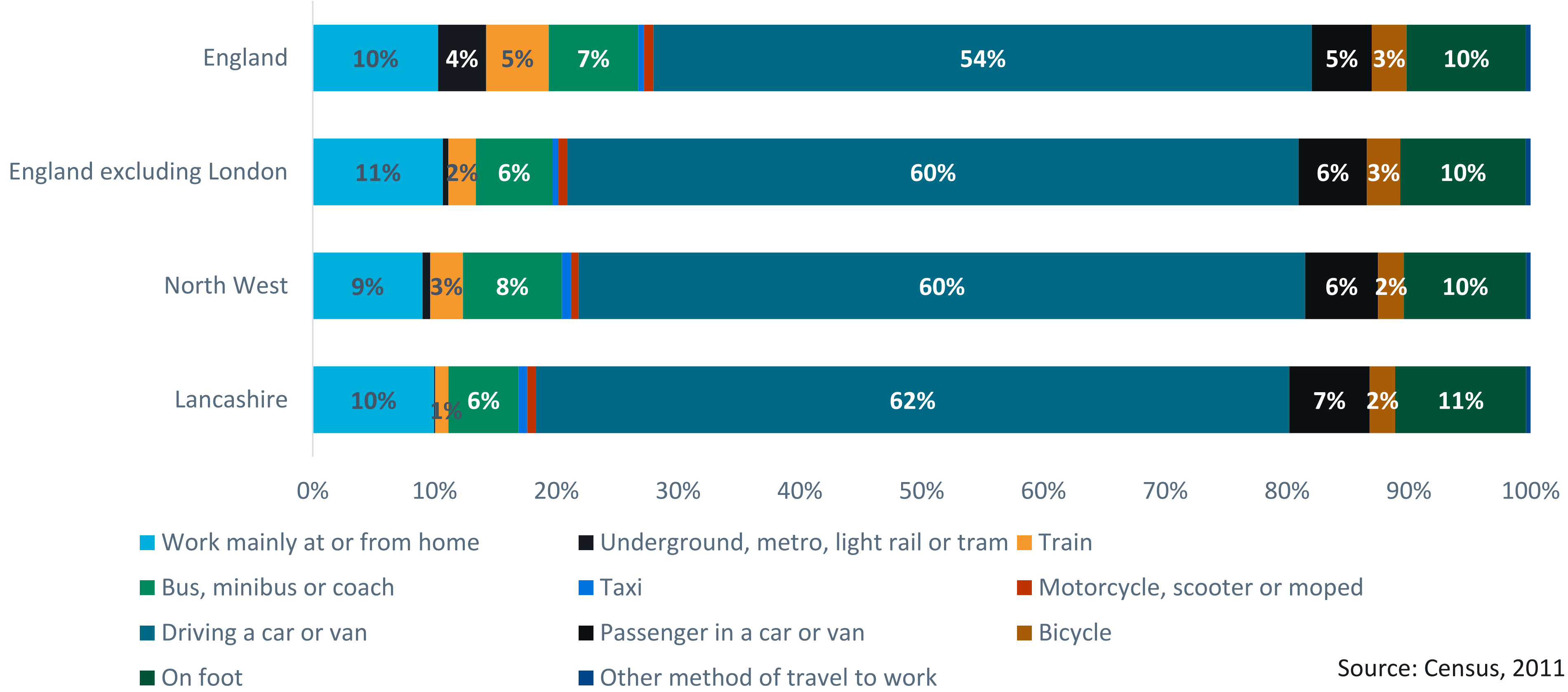



Source: Highways England, National Rail, 2018.

# The importance of transport links – Transport modes

- In Lancashire, a relatively low proportion of people travel to work by public transport and accordingly a relatively high proportion travel to work by car.
- Across Lancashire, 7% of residents travel to work by public transport, compared to 11% in the North West, 9% across England excluding London and 16% across England as a whole.

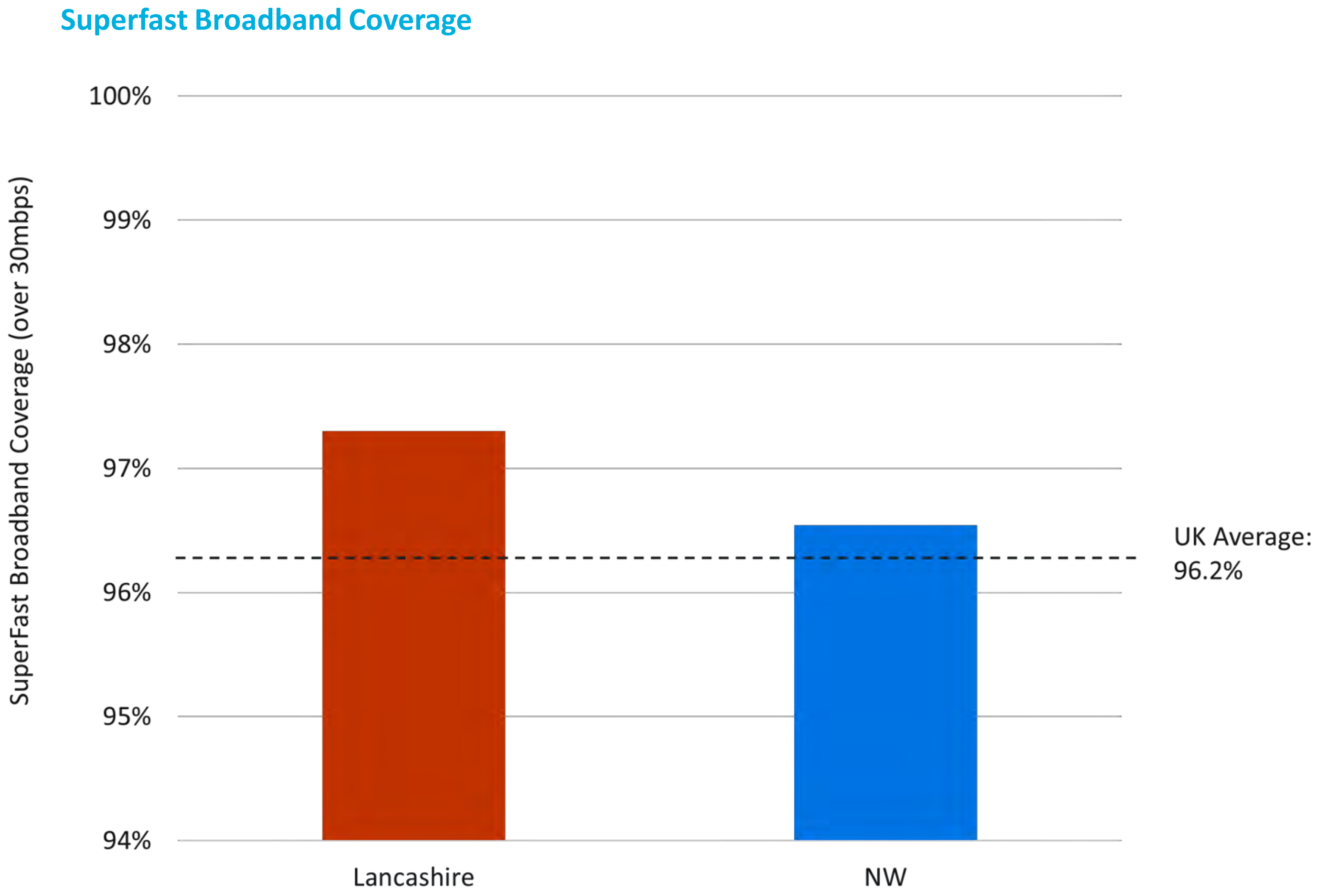
## Method of Travel to Work




Source: Census, 2011

# Digital connectivity across Lancashire

- Lancashire performs well in terms of its digital infrastructure with over 97% of its area benefiting from SuperFast broadband coverage compared to just over 96% across both the North West and UK as a whole.
- However, Lancashire is poorly served by fibre-optic networks, which could hold back the development of the digital economy and adoption of Industry 4.0.




Source: Think Broadband Local Broadband Information, 2019

# Energy

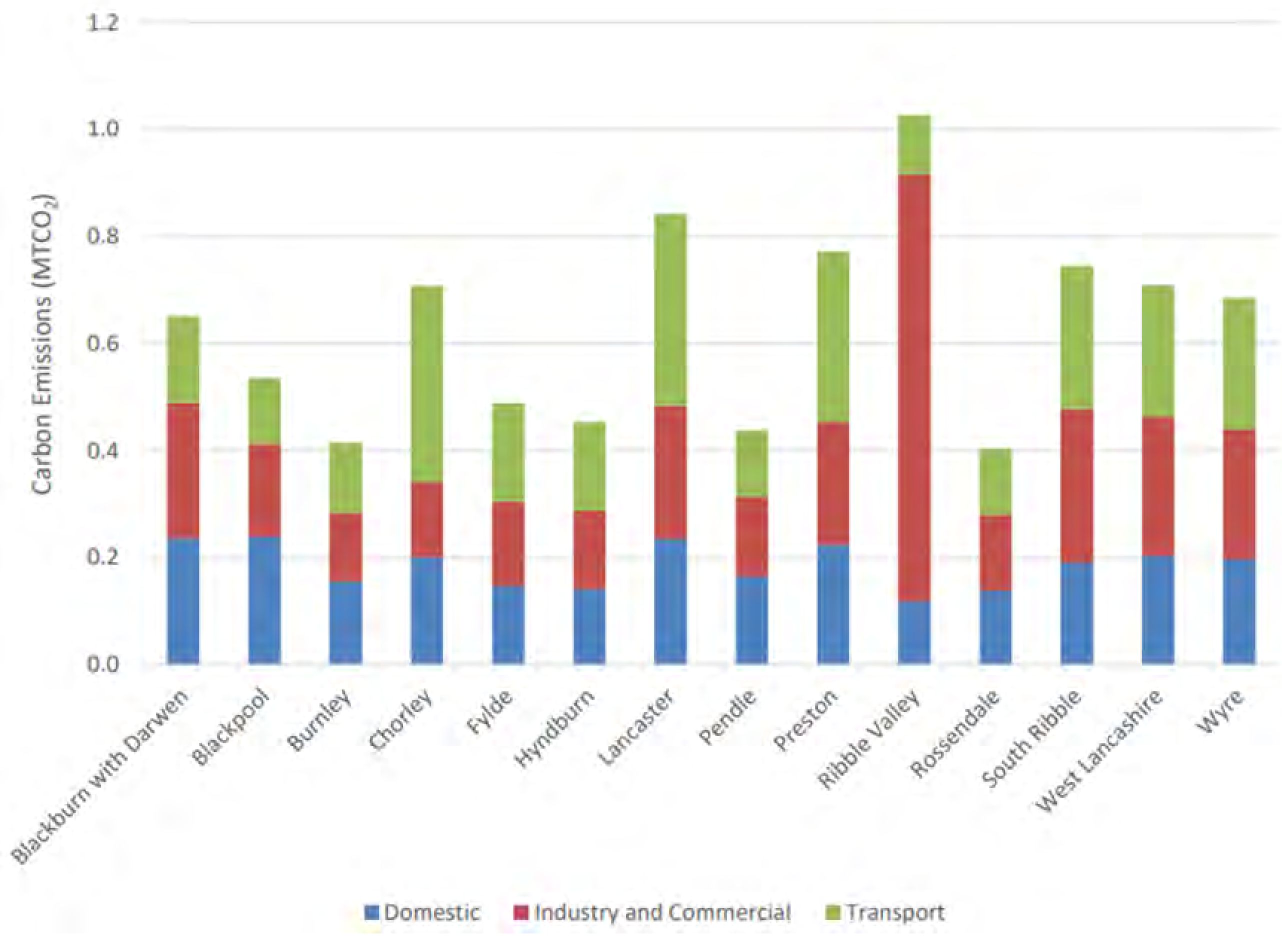
The Lancashire Energy Plan found that Lancashire has:

- Significant potential for wind power (both on and offshore) however planning barriers my prove a constraint;
- An established nuclear industry and supply chain in which key businesses continue to find new market expansion opportunities; and
- A high-value services sector that supports the small-scale renewable energy industry, which could providing continued growth opportunities.

The Energy Plan highlighted fuel poverty issues are exacerbated by lack of access to the gas grid in some areas.

- Lancashire has a Fuel poverty rate of 12.2% compared to 11.8% and 11% across the North West and England respectively.

## Carbon Emissions by Local Authority District




Source: Lancashire Energy Plan Review

# Housing delivery

- Lancashire is delivering new housing, with Chorley exceeding local plan targets, but most areas have some way to go to achieve their housing delivery targets.


Source: LUC, 2019 & Lancashire County Council, 2018

# Sites and premises

Lancashire County Council commissioned Colliers International to report on local sites and premises issues – see next section for map of key locations. The report found:

- Samlesbury, Cuerden and Lancaster Innovation Park have the highest commercial market attractiveness in terms of Lancashire's Strategic High Quality Employment Sites.
- Warton, Preston City Centre, Burnley Bridge, Innovation Drive Burnley, UCLan Campus Preston, Buckshaw and Preston East/ Red Scar score highly in terms of market attractiveness for Lancashire's Strategic Employment Sites.
- Preston's sites were rated highly as the administrative centre and major population centre and with motorway and rail links and an expanding university.
- Enterprise Zones are an important part of Lancashire's sites and premises offer. The Samlesbury site houses BAE Systems Military Aircraft HQ, an Enterprise Zone and aerospace park development facilitates. The Warton site is of major importance to Lancashire's economy but is less accessible than the Salmesbury site.
- Good motorway connectivity and road infrastructure more broadly facilitate the success of sites. The Colliers report found that Cuerden site is the second most attractive to the commercial market, due to its location adjacent to the M6 and M65. Burnley Bridge is considered to be the key site for strategic development in East Lancashire, one reason being its proximity to the A56. Heysham Port is an international gateway for people and goods into Lancashire, the report urges the development of M6 link road would strengthen demand for the Port as a business location.
- Lancaster Innovation Park is an important site in Lancashire providing high quality employment and investment, recently positioning itself towards a speciality in medical related uses, the report found it to be the third highest ranking site in terms of market attractiveness. Lancaster University ranks very highly in disciplines including Physics and Environmental sciences, and is a member of the N8 Group for research.
- Innovation Drive in Burnley exemplifies how the public sector can utilise its land ownership with partnerships to transform perceptions of sites. The key for this site is its proximity to aviation and advanced manufacturing businesses that have far-reaching influence. The Preston East/Red Scar site is also largely in public sector ownership with scale, locational and strategic advantages, but a one way junction on the M6 hinders it's relative value.
- Major sites for employment across Lancashire include; Skelmersdale, Whitebirk, The A56 Corridor, Lancashire Business Park, Pendle Gateway, Hillhouse Business Park, and in more rural settings still providing jobs in large numbers; West Craven and Barrowbrook. These sites scored lower than those detailed above as they are traditional industry rather than priority sectors and have limited wider influence.
- However, the report notes that the North West the office market is dominated by Manchester City Centre. Lancashire's office rental levels are much lower and therefore less attractive for developers of Grade A office space.

Source: Colliers International Report for Lancashire CC, 2014

# Place

# Introduction

## Outline of this section

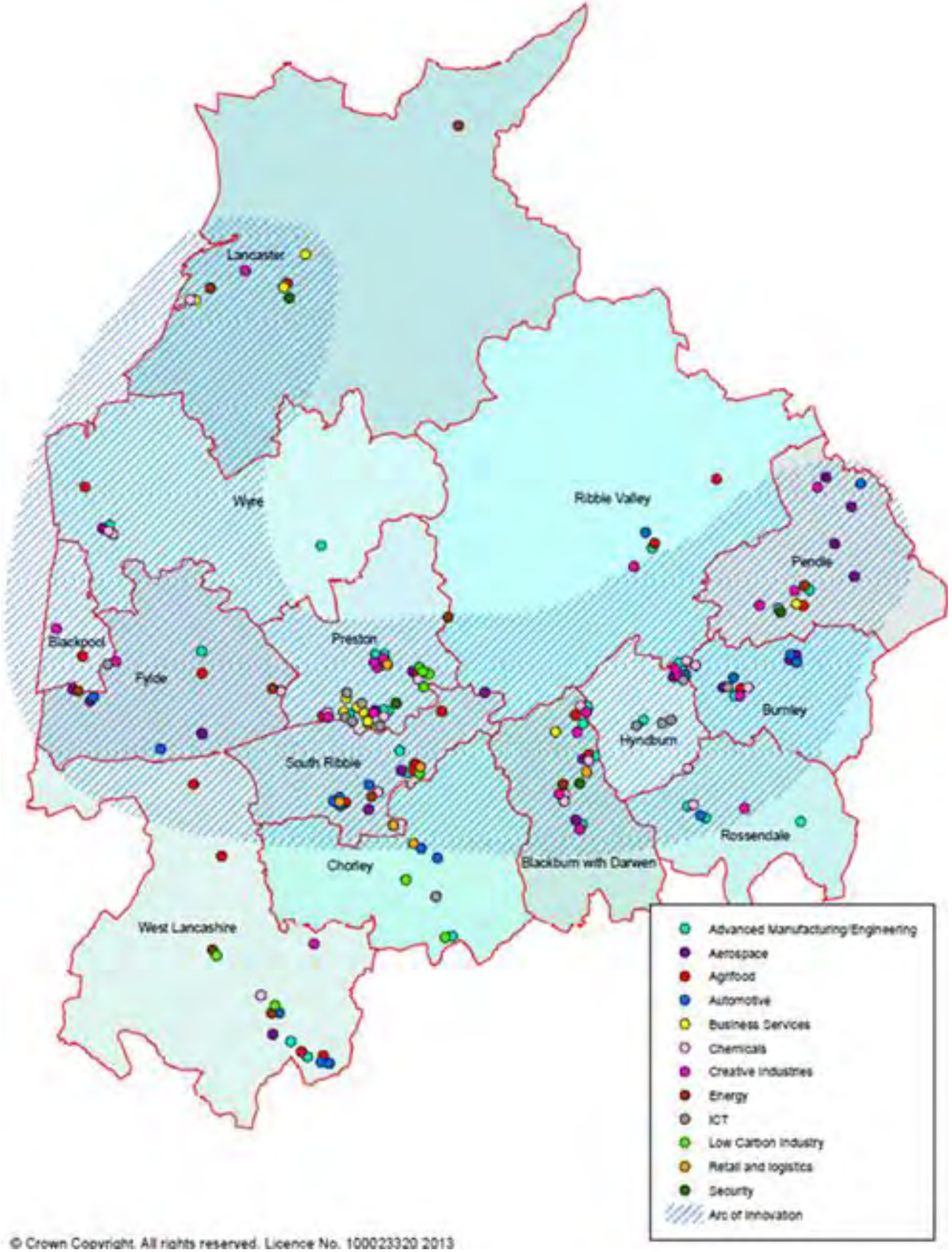
- This section looks at the spatial and human geography of Lancashire.
- It draws on national datasets and local evidence to outline headline issues related to:
    - Key employment locations and employers;
    - Retail and commercial centres;
    - Travel to Work patterns;
    - Variations in employment, earnings and income by Local Authority District;
    - Deprivation;
    - Housing;
    - Quality of Life;
    - Visitor economy; and
    - Agriculture.

## Key messages

- Lancashire has employment hotspots with key clusters of activity linked to advanced manufacturing, innovation and retail and commercial centres, which are associated with transport provision.
- It has a relatively self-contained labour market – it 'imports' 14% of its workforce and exports 12% of its workers to other areas.
- Key sources of workers are: Wigan, Bolton and Sefton, while key destinations for Lancashire residents are these areas plus Manchester.
- There is significant travel to work between local authority areas with sub-regions.
- There are stark variations in rates of benefit claimants and job seekers between Local Authority Districts. These variations are also reflected in weekly pay and disposable income, and maps of deprivation.
- The county has relatively affordable housing, good access to green space, and there are limited issues in relation to air and light pollution.
- While the county is home to nine arts bodies which receive long-term funding from Arts Council England, the county's overall cultural offer is relatively limited – and this is seen by key stakeholders as a barrier to attracting and retaining talent and investment.
- The visitor economy and agriculture are key sectors which rely on the physical attributes and natural assets of the county.
- There are long-term historical strengths on which to build the visitor economy – but major challenges for coastal and seaside towns, which have seen long-term changes in holiday trends over the past 25-30 years.
- The agricultural, forestry and fishing industries are intimately linked to place – they form an essential part of the management of the place, with over 200, 000 hectares of farmland.

# Lancashire’s Priority Business

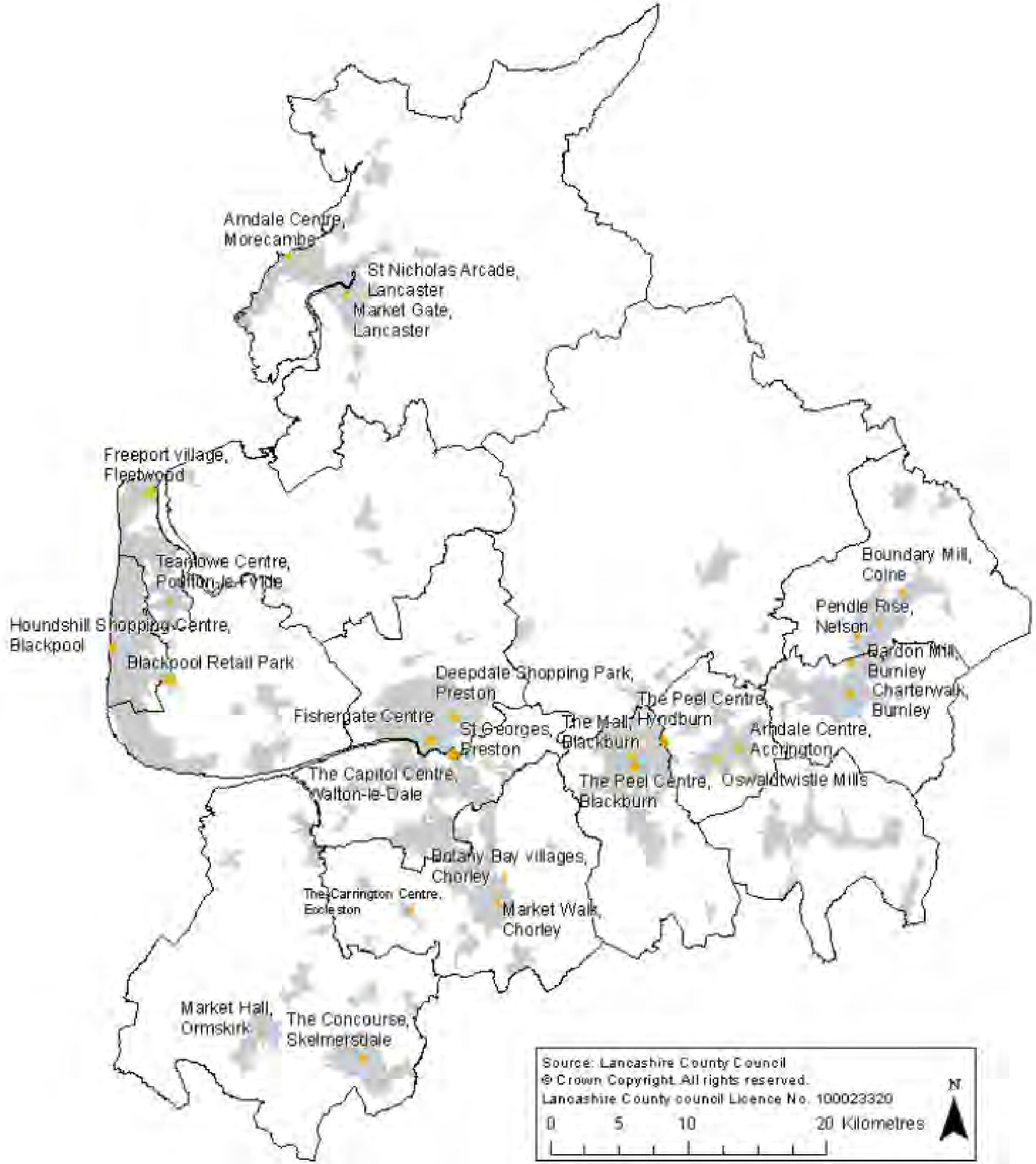
- This map shows clusters of businesses in priority sectors in Lancashire:
  - **Advanced Manufacturing and Engineering.** There are clusters in Samlesbury/Warton (South Ribble), Fleetwood (Wyre), Burnley, Lancaster and Preston.
  - **Aerospace.** Lancashire is home to the single largest concentration of aerospace activity in the UK, with clusters in Burnley, Fylde, Pendle and the Ribble Valley as well as Samlesbury and Warton, as part of the Enterprise Zone.
  - **Energy and Environmental.** The nuclear sector is mainly located at the two power stations at Heysham (Lancaster), Preston and wider areas of the North West. There is also a broad range of renewable businesses across the area.
  - **Tourism** clusters are in Blackpool, Lancaster with other organisations spotted across the area.
  - **Finance and Professional.** Lancashire is somewhat currently has no significant clusters in this sector in part due to clustering activity in Manchester**.**
  - **Digital and Creative.** Standard data sources did not identify  digital and creative clusters, e.g. due to extent o freelancing activity and issues of definition, anecdotally digital and creative clusters are forming, e.g. in Burnley.
- The shaded area, shows the majority of the businesses in the key sectors are concentrated in this ‘Arc of Prosperity’.




Source: Colliers International, Strategic Commercial Development Advice, 2014

# Retail centres

- This maps shows Lancashire's major retail centres.
- In 2013, Preston and Blackpool were highlighted as the only 'primary centres' in the county.
- The largest shopping centres in Lancashire are The Mall, Blackburn (60,386m²), The Fishergate Centre in Preston (48, 587m²) and Charter Walk in Burnley (44,912m²).
- Surrounding areas of Liverpool and Manchester continue to offer a competitive retail e.g. Liverpool One and The Trafford Centre.

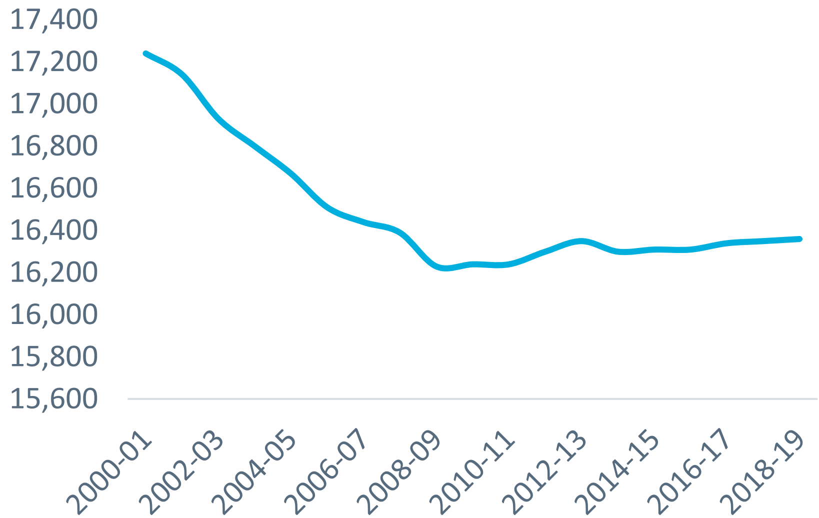



Source: Colliers International, Strategic Commercial Development Advice, 2014

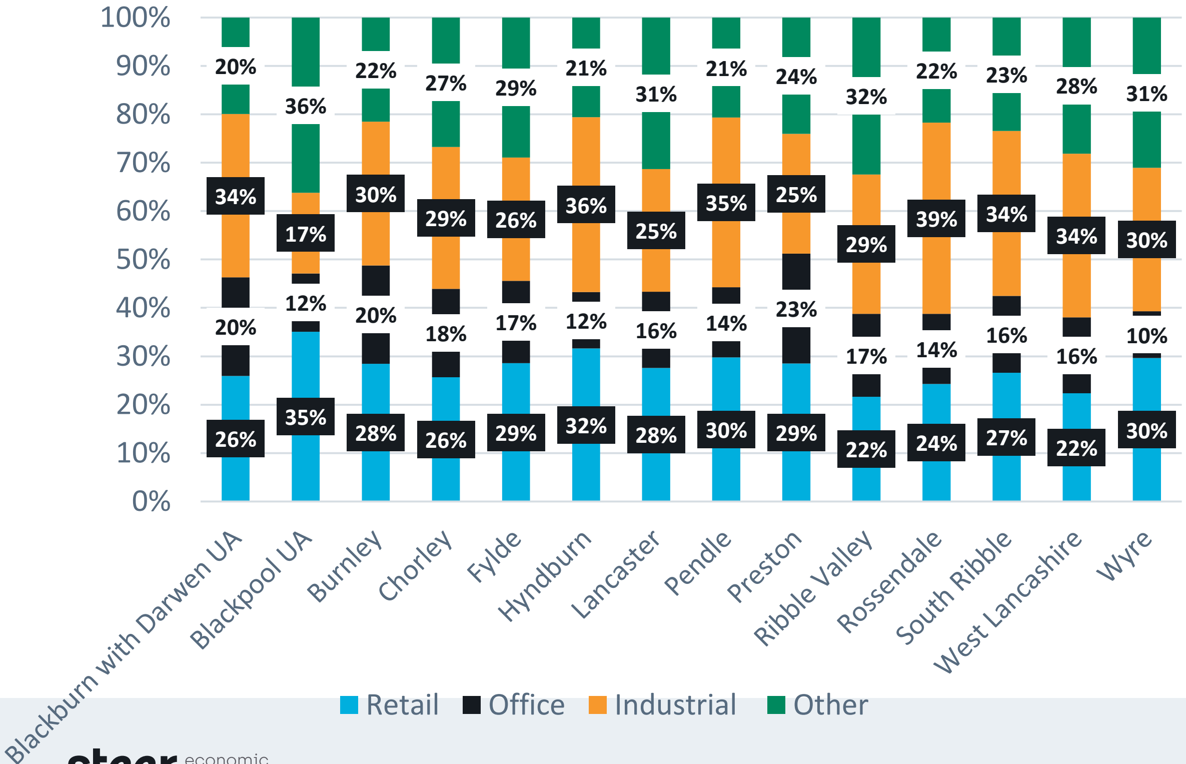
# High streets

- Retail units in Lancashire have been decreasing in number since 2000 and whilst there has been a general upwards trend in value this has not been stable.
- The make-up of commercial floorspace differs by local authority, with Blackpool having the highest proportion of retail (35%) and the smallest proportion of industrial (17%). Rossendale and Hyndburn have the largest proportion of industrial space, 39% and 36% respectively. Preston (23%), Burnley (20%) and Blackburn (20%) have the largest proportion of office space.
- High streets in Chorley, Lancaster (Morecambe), Pendle (Nelson) and Wyre (Fleetwood) have been shortlisted for funding from the Future High Street Fund

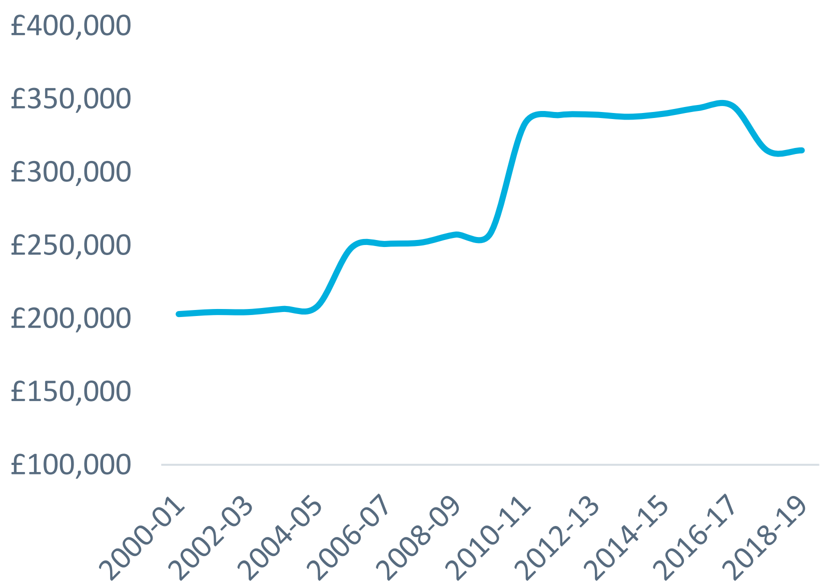
**Retail units by number for Lancashire over time**




**Composition of commercial floor space by type by Local Authority**



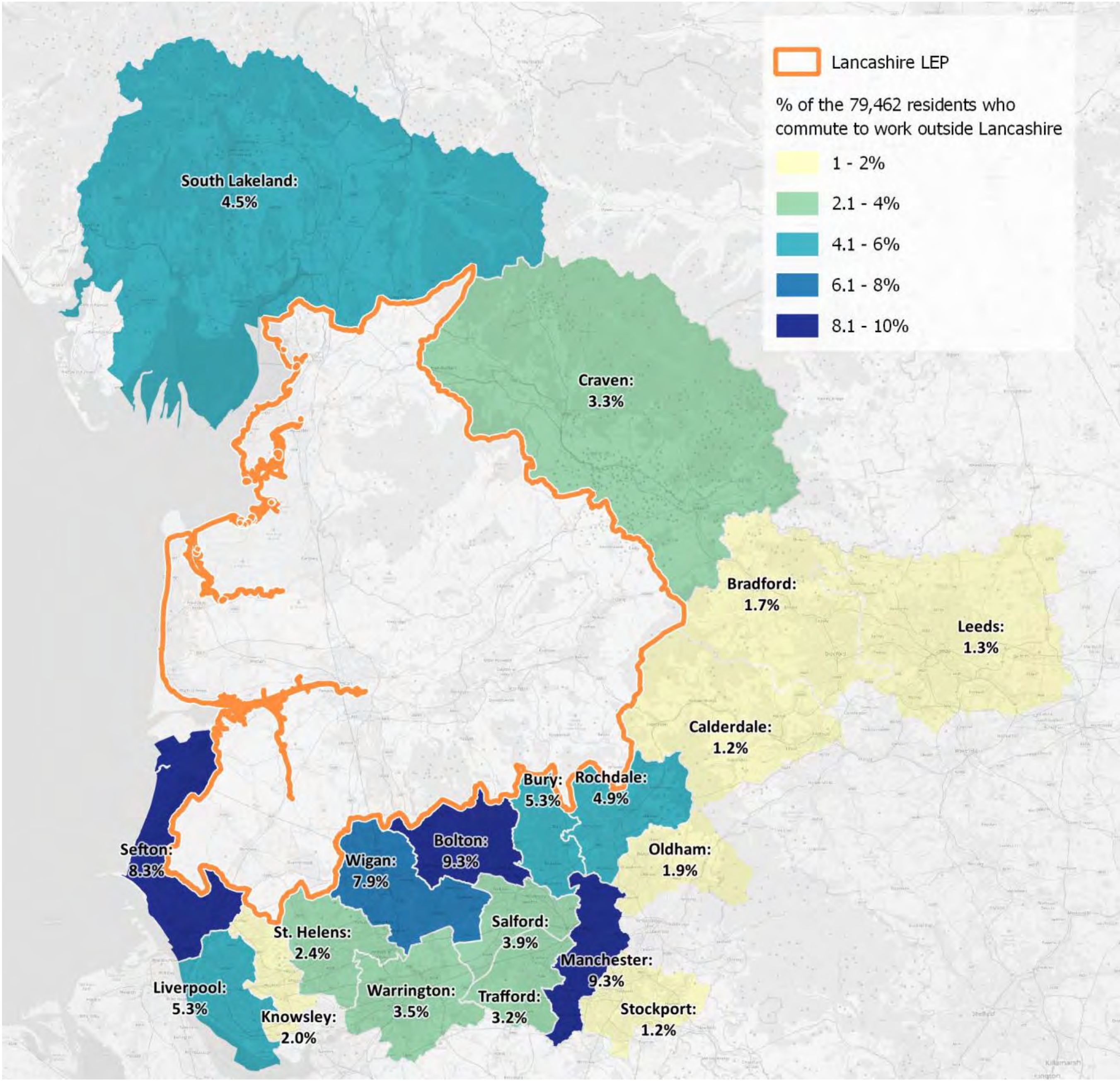

**Retail units by value for Lancashire over time**




Source: VOA, 2019

# Travel to work – Worker outflows

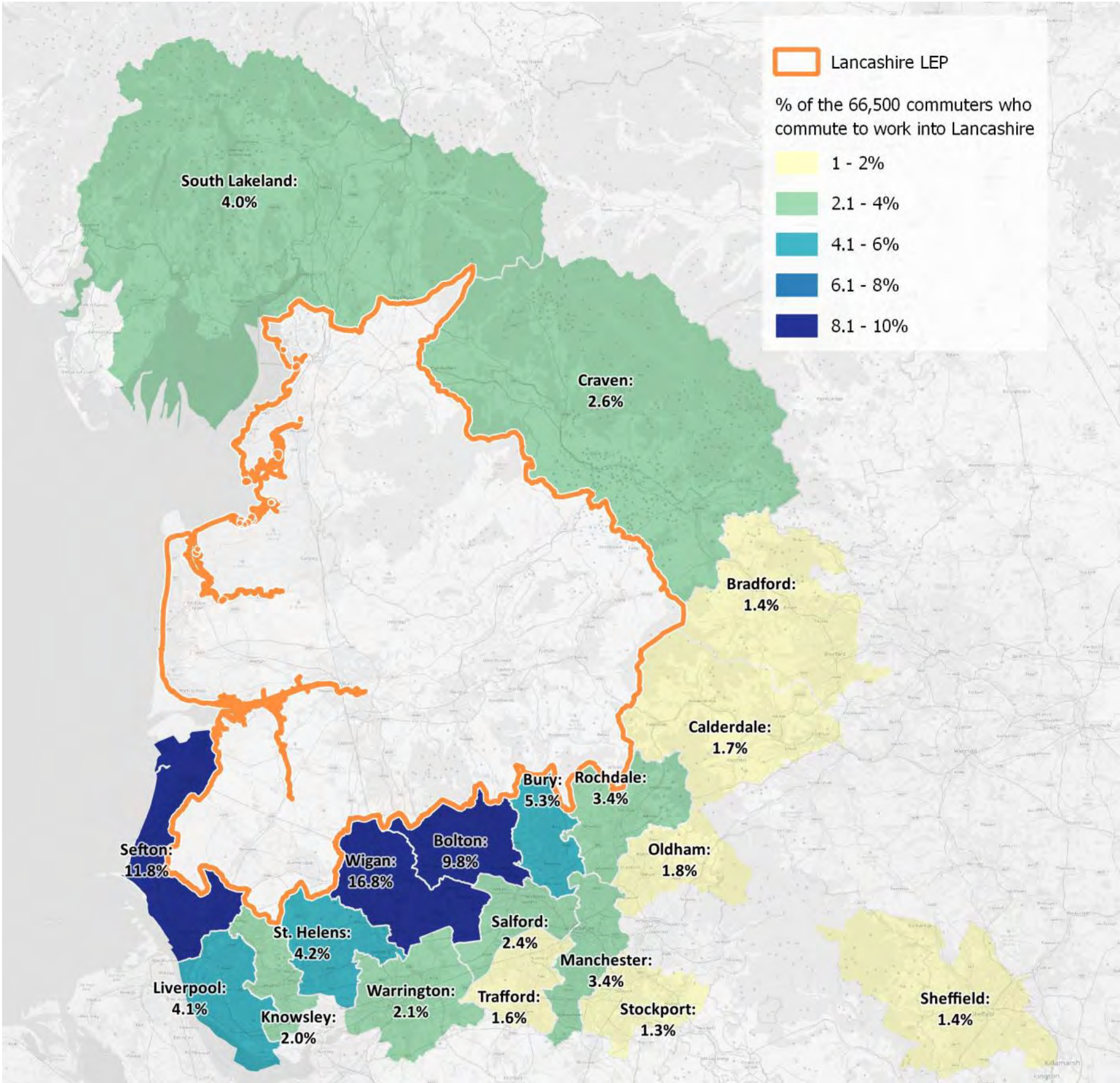
- 79,642 Lancashire residents commute to work outside of the LEP area.
- The most popular locations for residents of Lancashire who commute out of Lancashire are Bolton (9.3%), Manchester (9.3%), Sefton (8.3%) and Wigan (7.9%). All of these are adjacent local authorities to Lancashire apart from Manchester.
- Most Lancashire residents who commute outside the LEP area remain in the North West, with a small proportion commuting to Yorkshire.




Source: Census, 2011

# Travel to work – Worker inflows

- 66,500 of people who work in Lancashire live outside the LEP area.
- The greatest proportion of residents who are commuting into Lancashire from outside the LEP area are from Wigan (16.8%), Sefton (11.8%), Bolton (9.8%) and Bury (5.3%).
- Most Lancashire workers who commute from outside Lancashire live in the North West. With a small proportion of Lancashire's workers (<10%) coming from local authorities in Yorkshire.

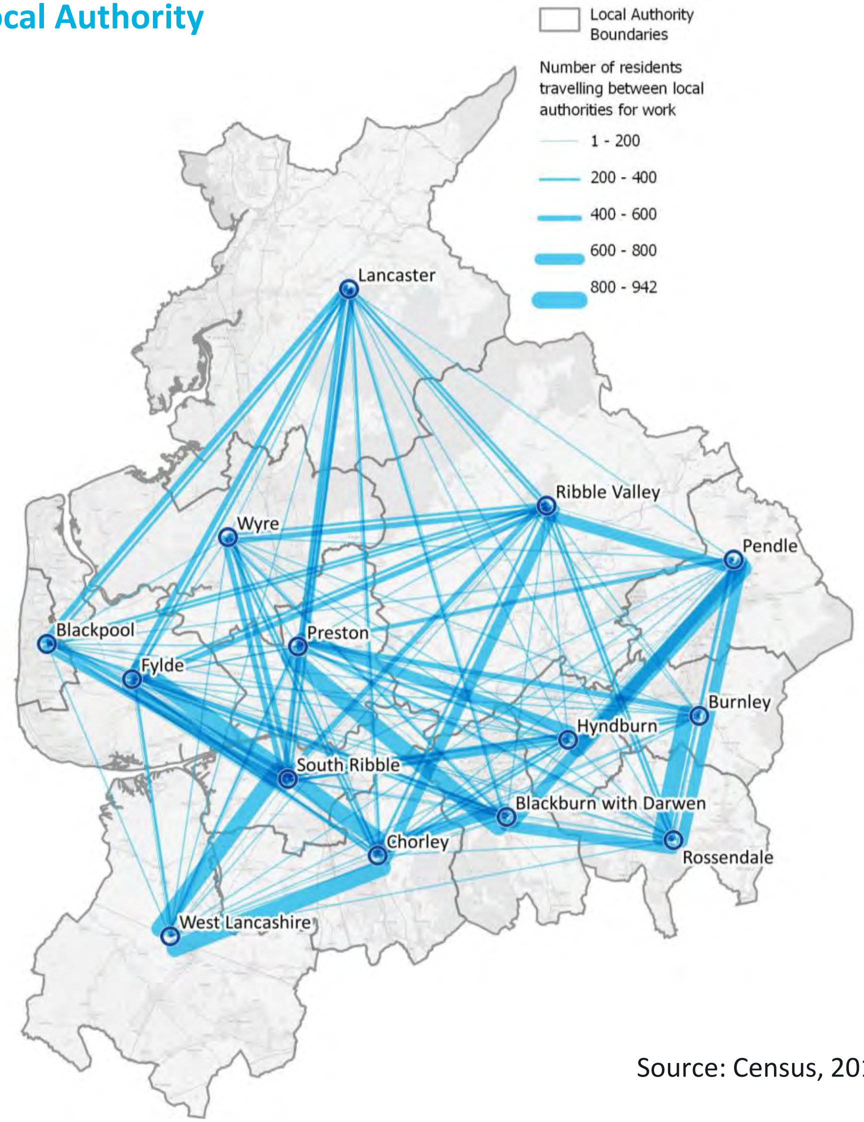



Source: Census, 2011

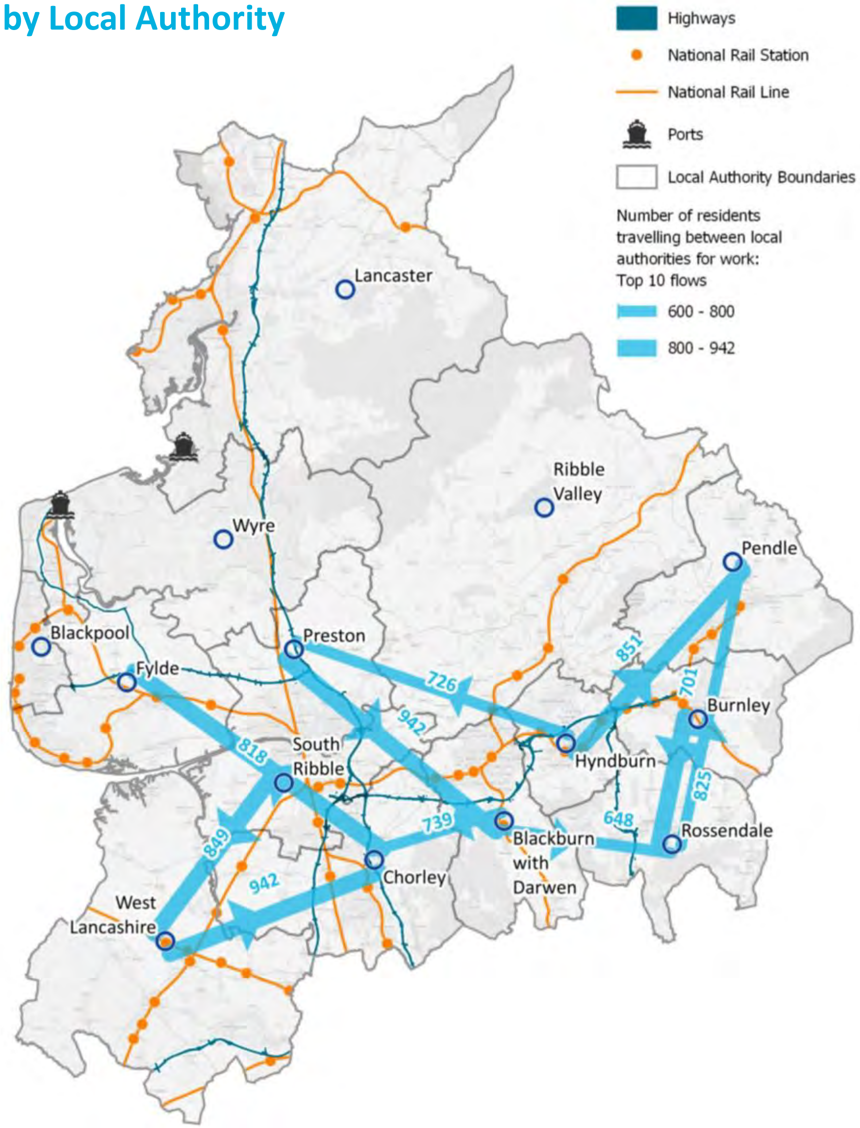
# Travel to Work – Intra-LEP flows

- The travel to work flows between Lancashire's local authorities are pictured below, with the map on the right showing the ten most significant flows

## Intra-LEP travel to work flows in Lancashire by Local Authority




## Top ten intra-LEP travel to work flows in Lancashire by Local Authority




Source: Census, 2011

# Lancashire's Travel to Work Areas (TTWA)

Whilst, not all residents work in the Travel to Work Areas (TTWA) in which they live. TTWAs represent labour markets in which the residents of each local area are most likely to work. Lancashire's TTWAs are:

- Blackburn with Darwen, Hyndburn, Rossendale and Ribble Valley;
- Blackpool, Fylde and Wyre;
- Burnley and Pendle;
- Lancaster and Morecambe;
- Preston, Chorley and South Ribble; and
- West Lancashire.

## Lancashire by Travel to Work Area (TTWA)