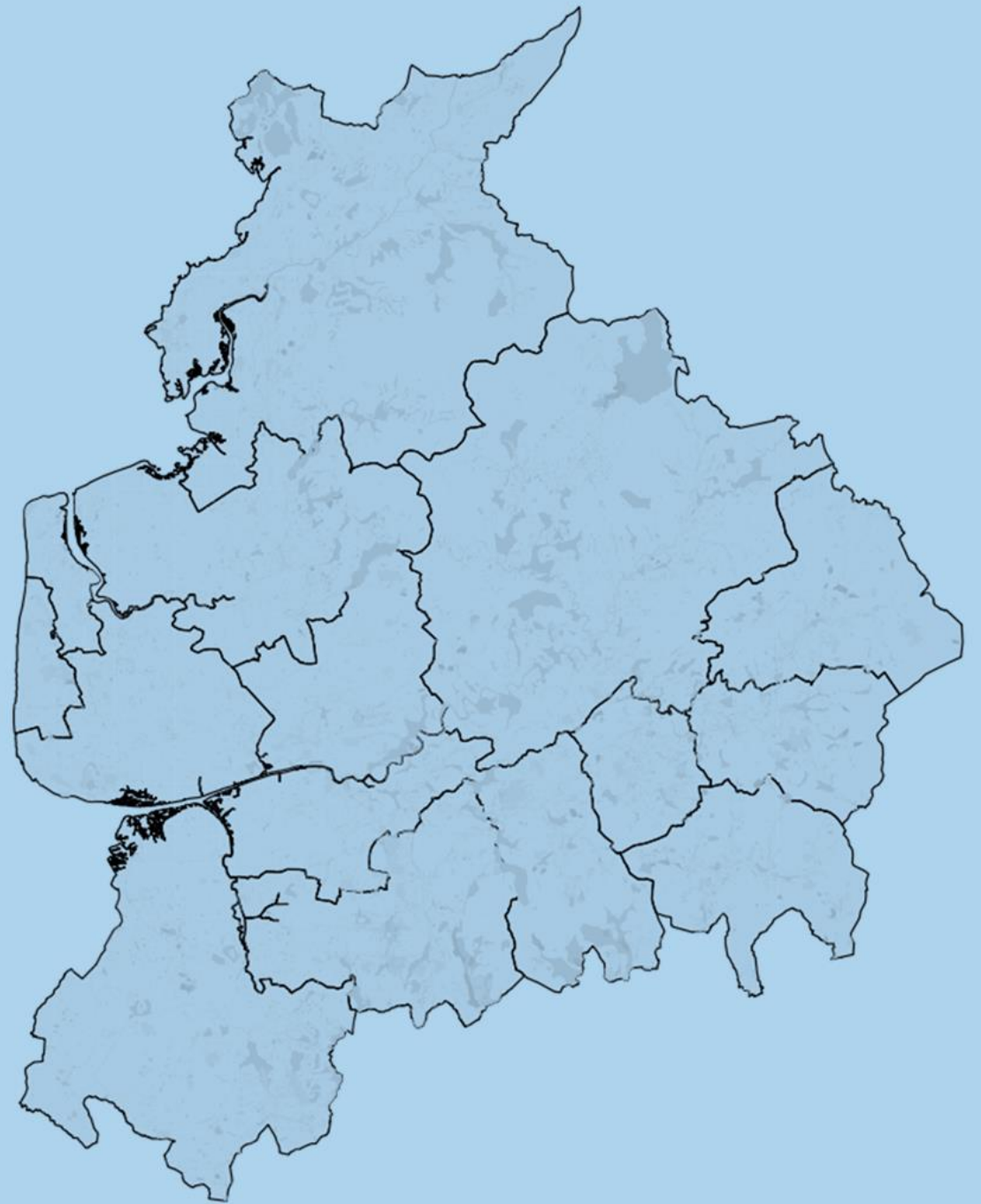


Lancashire LGR Options Evidence Base

Final Version

October 2025



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Data Pack Overview

This report is the data pack that sits alongside the Local Government Reorganisation business cases for Lancashire. This pack will provide objective evidence, much of which draws upon publicly available data from the Office for National Statistics and UK Government, as well as data provided by the Lancashire LGR Data Working Group, and separate mobile data to inform travel to work data. This report summarises and visualises all data collected for the local government reorganisation analysis.

The pack is split into five different sections, one for each theme covered: **Economic fundamentals; Economic geography, infrastructure and connectivity; sectors; skills; and investment and regeneration**. As a fully qualitative theme, section six, referring to governance and decision-making is not in this pack.

This analysis assesses the five different options across a variety of indicators in each theme. These options are:

- Two unitary authorities split by North and South
- Three unitary authorities split by North, South and East
- Four unitary authorities split by North, South, East and West
- Five unitary authorities split by North, South, East, West and Middle
- Four unitary authorities split by North, South, East, and West, with parts of Ribble Valley and Wyre split between different unitary authorities.

In total there are 16 separate geographies that data has been collected for, reflecting the different potential unitary authorities across each of the five options. The spatial extent of these options are set out on the following pages.

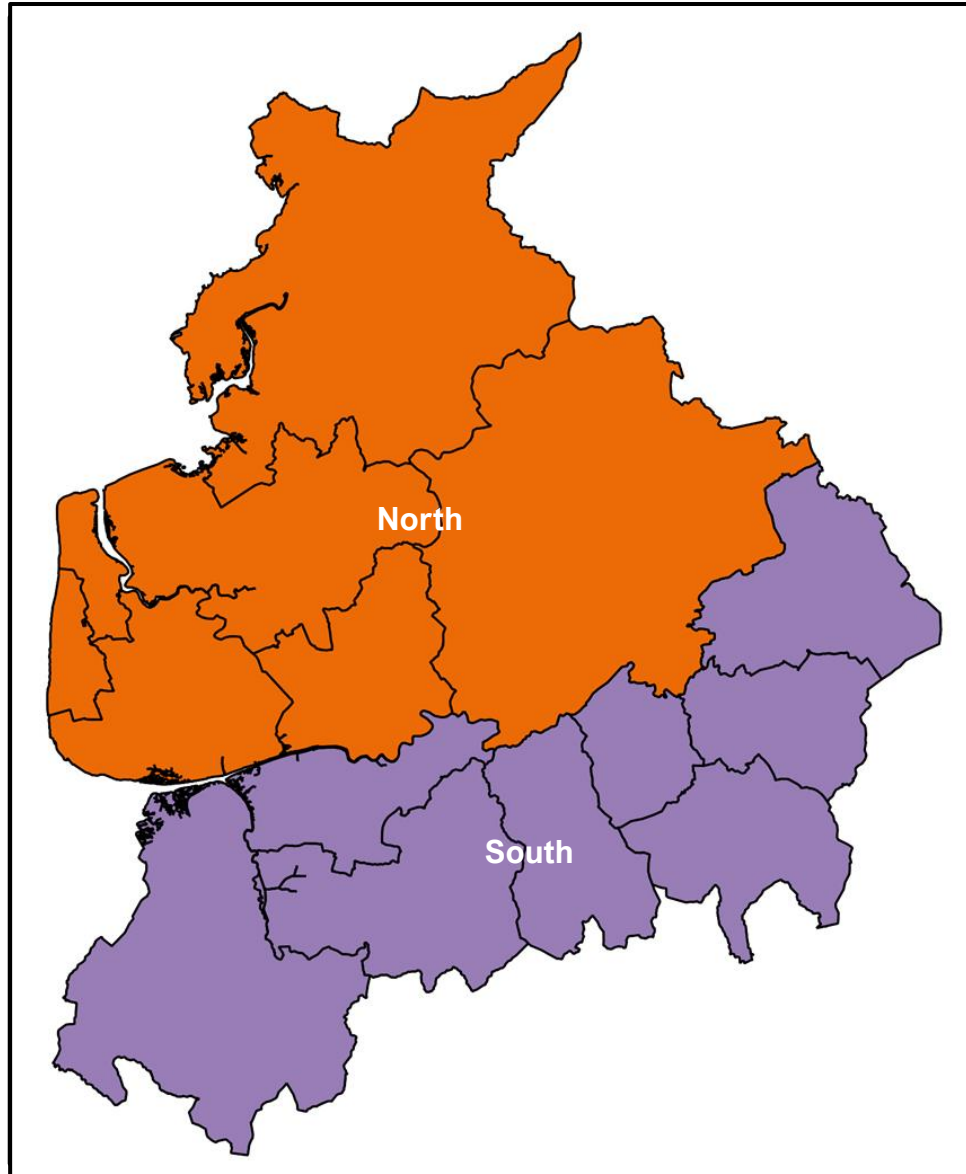
Differences in data

Except for the 4UA option supported by Blackpool, all other options use existing district boundaries as the starting point for LGR, and therefore draw on the same data across indicators.

The option supported by Blackpool, which is mapped on slide 9, proposes to divide wards within the existing districts of Ribble Valley and Wyre into different Unitary Authorities (UAs). Urban Wyre wards are included within a western UA along with Blackpool, Fylde and Preston. Rural Wyre and Northern Ribble Valley wards are included in a Northern UA along with Lancaster. Southern Ribble Valley wards are included in an Eastern UA along with Blackburn with Darwen, Burnley, Hyndburn, Pendle and Rossendale. A Southern UA includes the existing district boundaries for Chorley, South Ribble, and West Lancashire.

As a result of dividing up some existing district boundaries, alternative data sources have been used to source data at a lower level of geography – either at LSOA, ward, or MSOA where available. Data at a lower level of geography tends to be slightly more out-of-date and therefore data presented in the 4UA option supported by Blackpool will not be directly comparable with the other options across all indicators, but will cover the same areas (population, economy, deprivation, employment, businesses etc).

The annex lists wards used to form Urban/Rural Wyre and North/South Ribble Valley, and sources used across indicators.

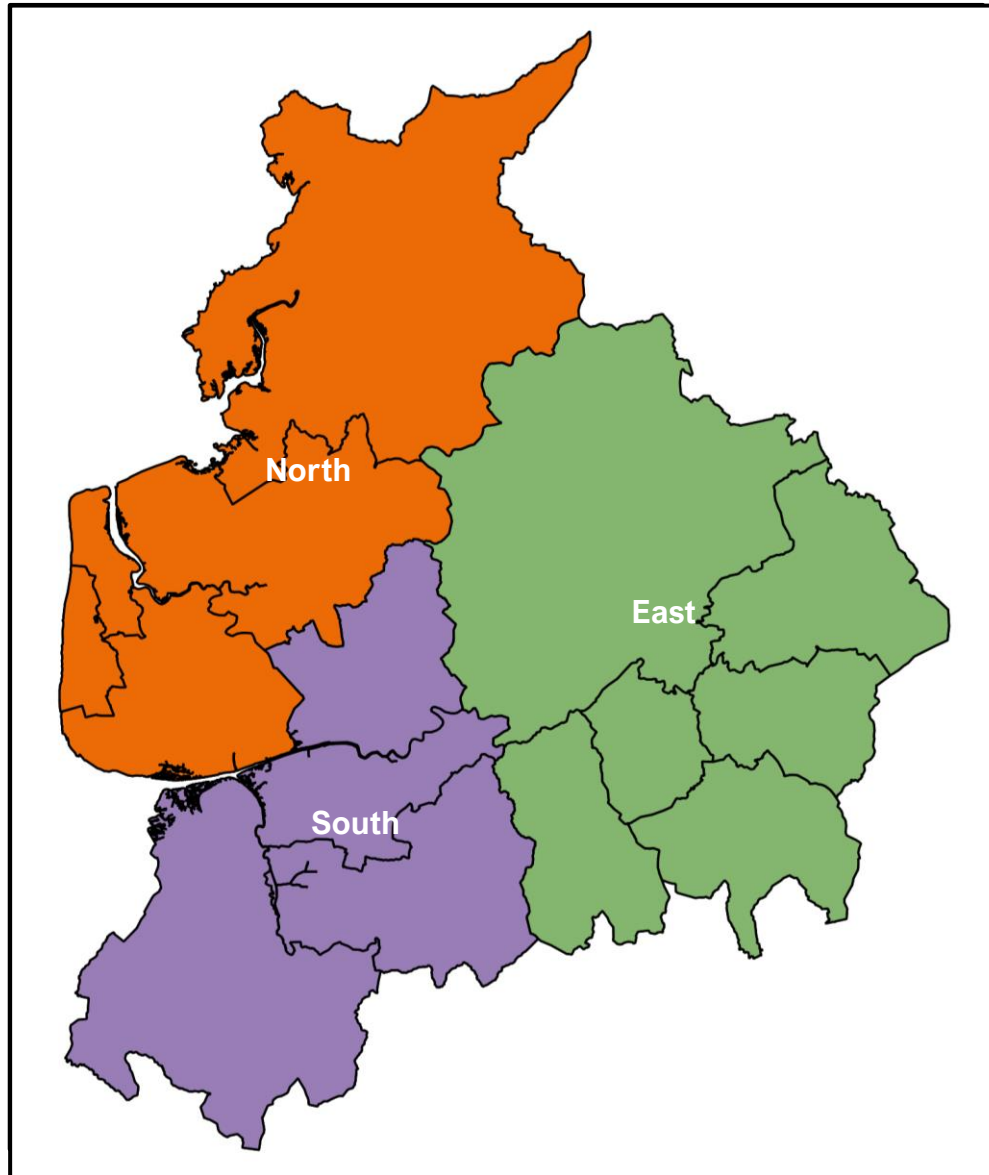


2 Unitary Authority (UA) Option

Two Unitary authorities: Bringing together the 14 current districts of Lancashire into two unitary authorities split by North and South.

North: Blackpool; Fylde; Lancaster; Preston; Ribble Valley; and Wyre

South: Blackburn with Darwen; Burnley; Chorley; Hyndburn; Pendle; Rossendale; South Ribble; and West Lancashire



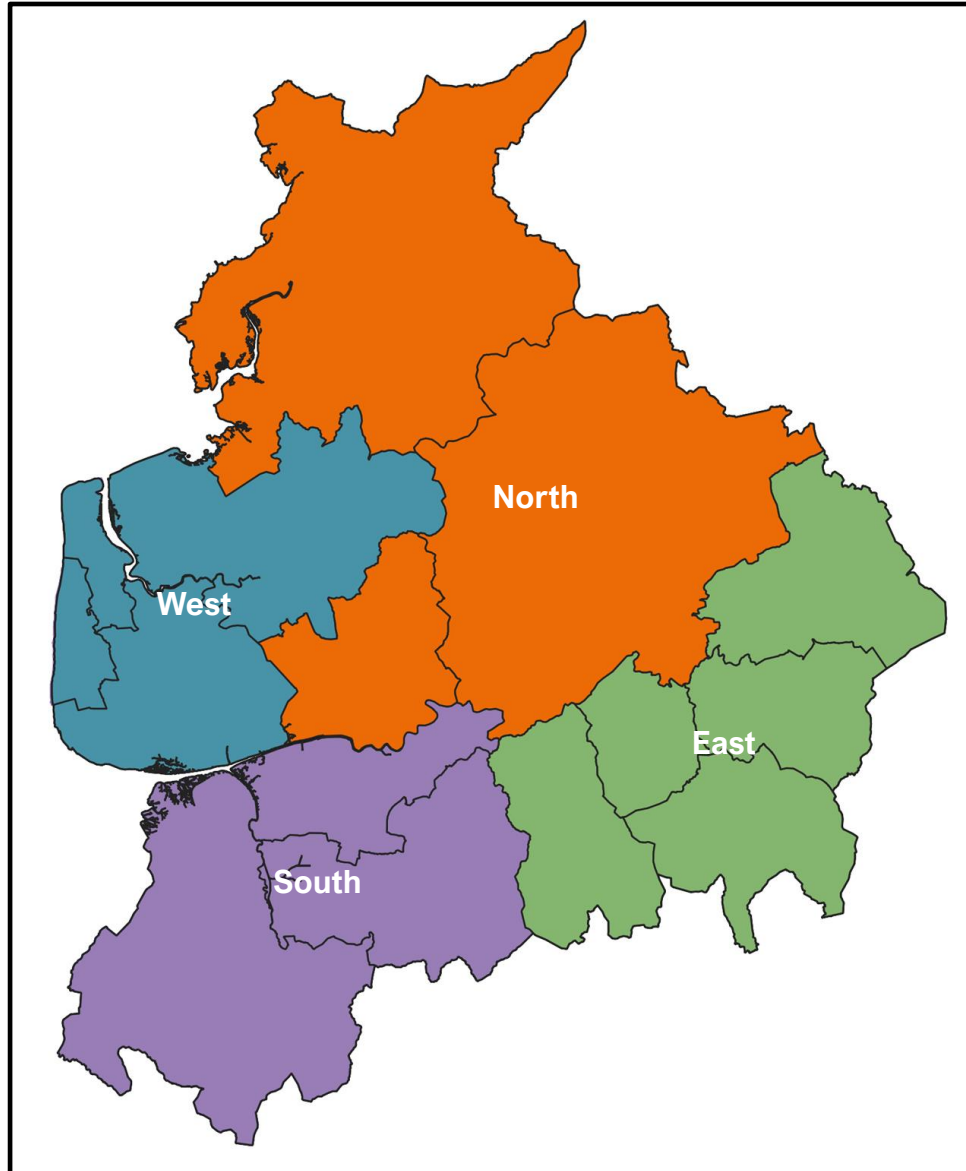
3 Unitary Authority (UA) Option

Three Unitary authorities: Bringing together the 14 current districts of Lancashire into three unitary authorities split by North, South and East

North: Blackpool; Fylde; Lancaster; and Wyre

South: Chorley; Preston; South Ribble; and West Lancashire

East: Blackburn with Darwen; Burnley; Hyndburn; Pendle; Ribble Valley; and Rossendale



4 Unitary Authority (UA) Option

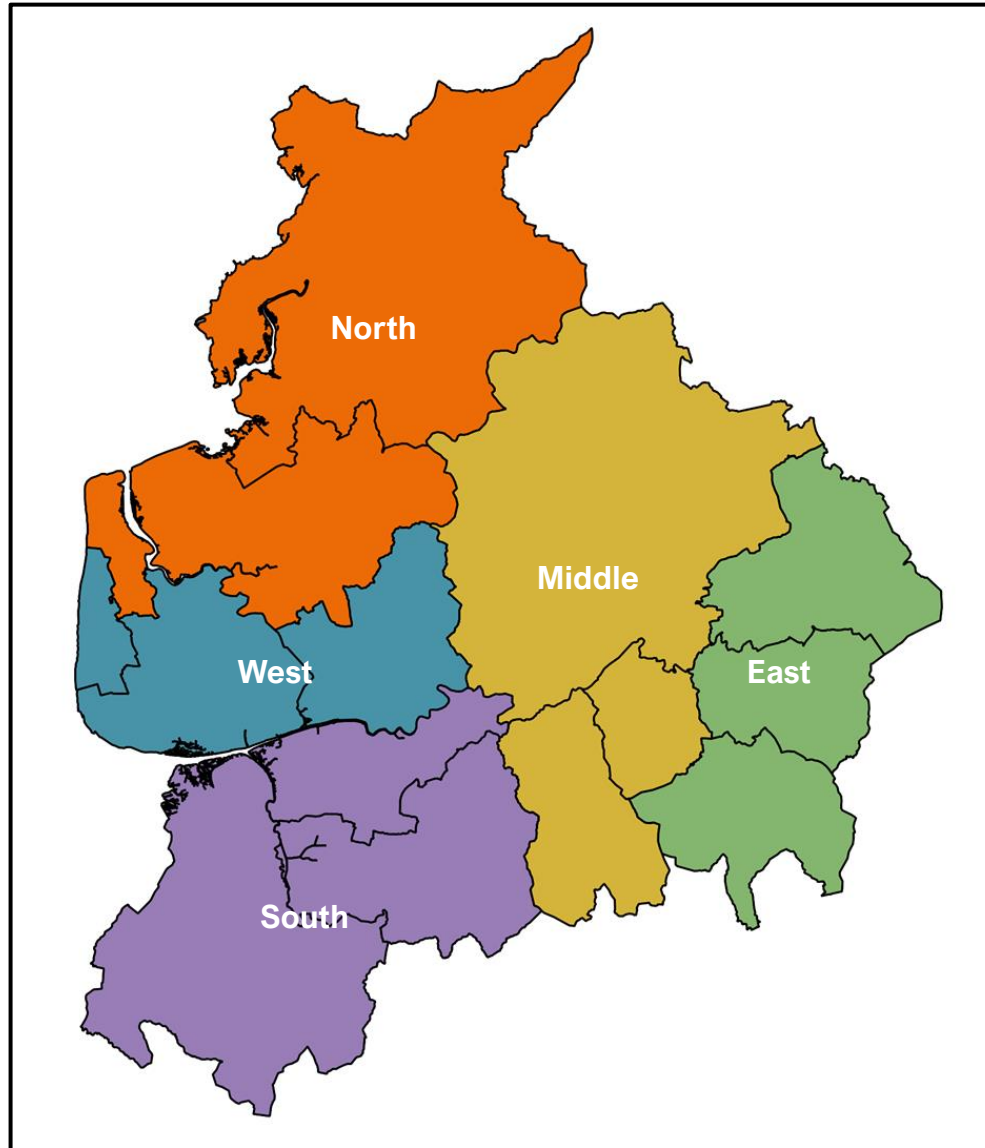
Four Unitary authorities: Bringing together the 14 current districts of Lancashire into four unitary authorities split by North, South, East and West

North: Lancaster; Preston; and Ribble Valley

South: Chorley; South Ribble; and West Lancashire

East: Blackburn with Darwen; Burnley; Hyndburn; Pendle; and Rossendale

West: Blackpool; Fylde; and Wyre



5 Unitary Authority (UA) Option

Five Unitary authorities: Bringing together the 14 current districts of Lancashire into five unitary authorities split by North, South, East, West and Middle

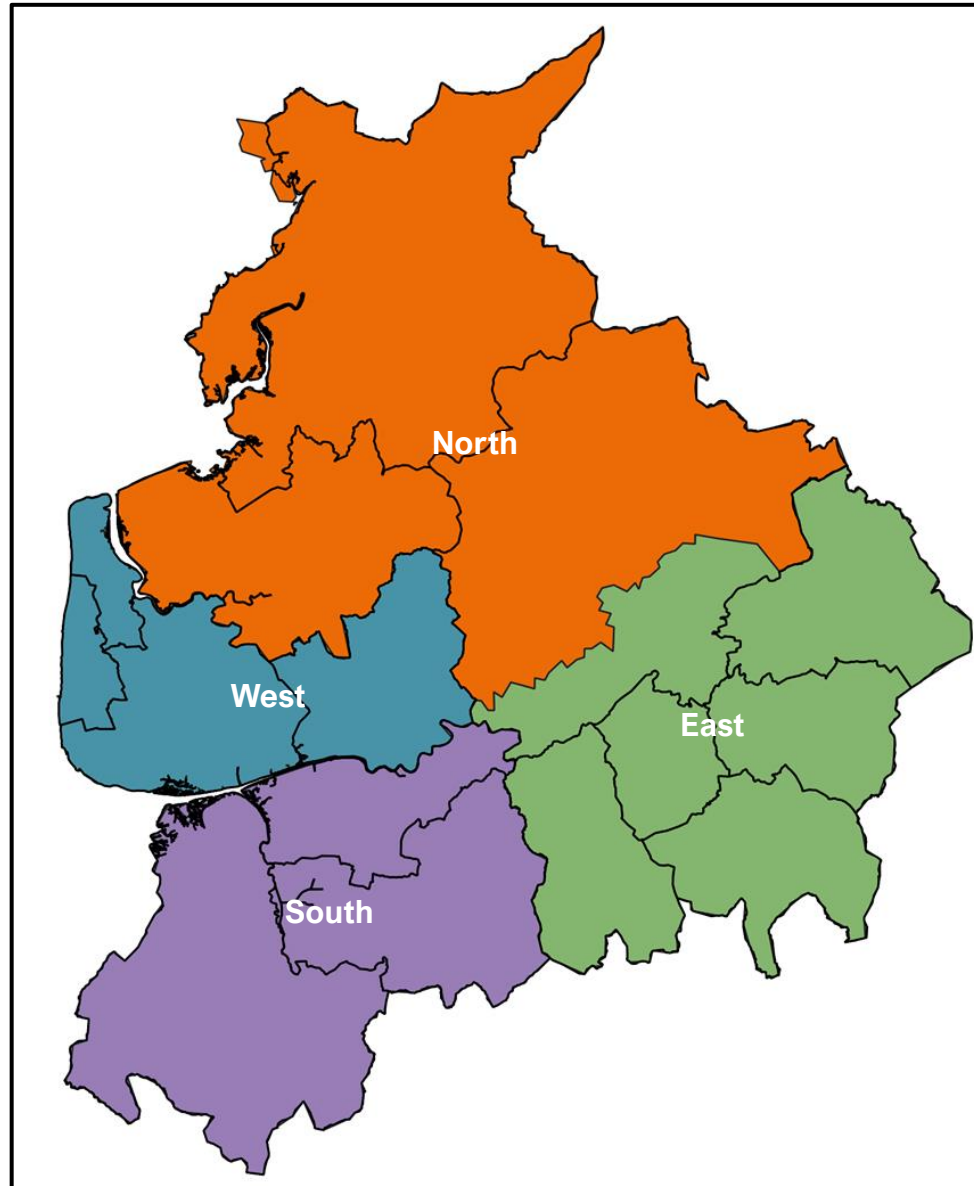
North: Lancaster; and Wyre

South: Chorley; South Ribble; and West Lancashire

East: Burnley; Pendle; and Rossendale

West: Blackpool; Fylde; and Preston

Middle: Blackburn with Darwen; Hyndburn; and Ribble Valley



4B Unitary Authority Blackpool (UA) Option

Four Unitary authorities: Bringing together the 14 current districts of Lancashire into four unitary authorities split by North, South, East and West

North: Lancaster; North Ribble Valley; and Rural Wyre

South: Chorley; South Ribble; and West Lancashire

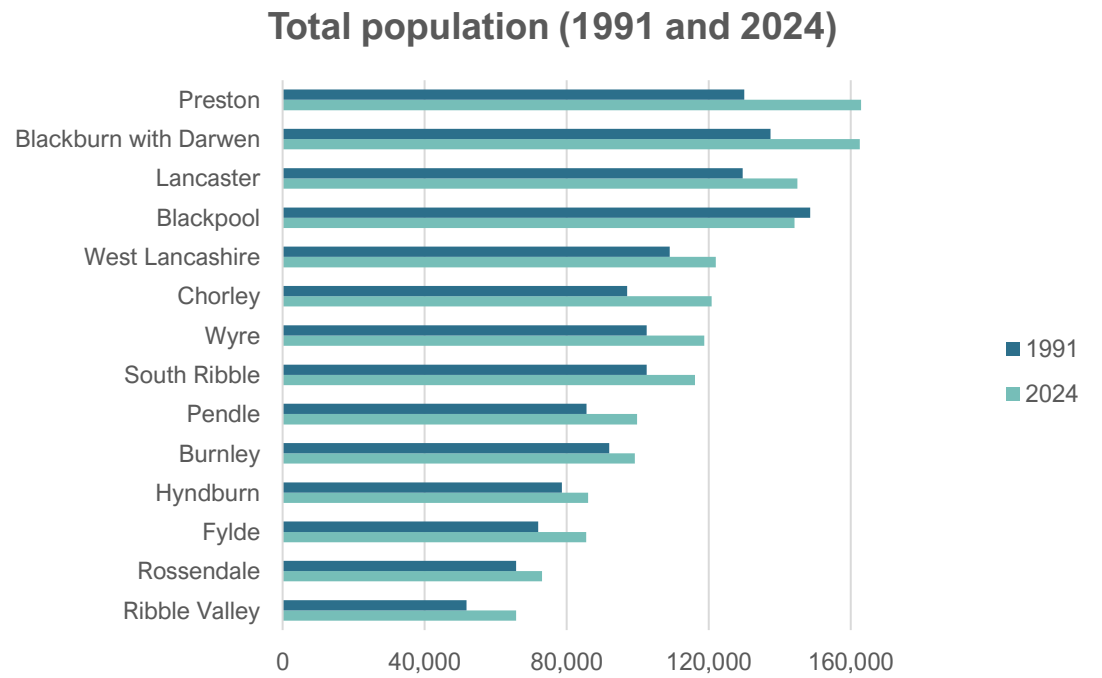
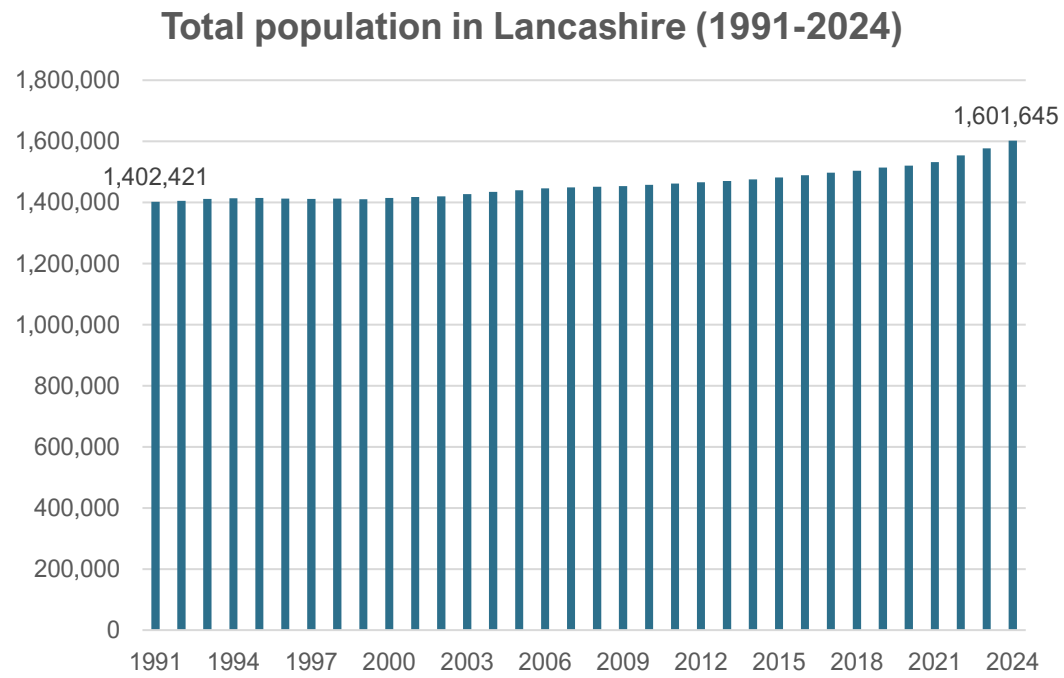
East: Blackburn with Darwen; Burnley; Hyndburn; Pendle; Rossendale; and South Ribble Valley

West: Blackpool; Fylde; Preston; and Urban Wyre

Socio-economic fundamentals

Total population

Total population across Lancashire (12 districts and 2 unitaries) has grown from 1.4m to 1.6m over the last three decades, growing by an average of 0.4% a year since 1991, in line with the regional average but slightly below the England and Wales average of 0.6%. Preston, Blackburn, Lancaster, and Blackpool all have populations around or above 150,000 people – around 40% of Lancashire’s total population. No area within Lancashire has seen growth above 0.7% annually. Blackpool has seen a fall in population size over the last 30 years.

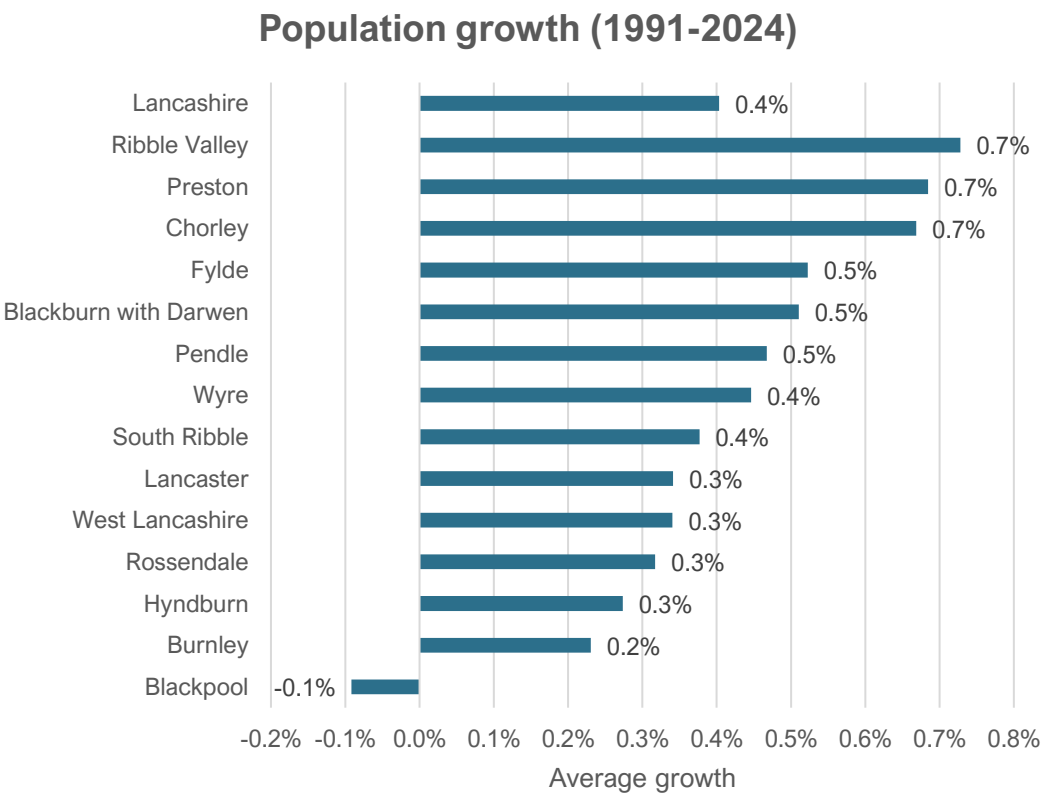


Source: Population estimates – local authority based by single year of age, ONS, 2025

Population growth

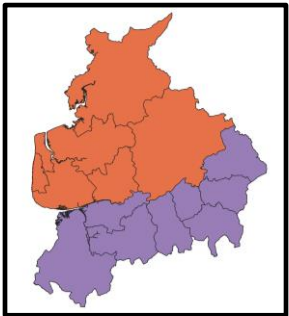
Population has grown by an average of 0.4% a year across Lancashire over the last 30 years, in line with the regional average but below the 0.6% a year nationally. Much of the population growth seen in Lancashire has been seen in Central and East Lancashire.

- Population in Lancashire (12 districts and 2 unitaries) has grown to 1.6m in 2024, average growth of 0.4% a year since 1991. This is in line with 0.4% growth seen regionally but below 0.6% average growth across England and Wales.
- Central Lancashire has seen the fastest growth, with Ribble Valley, Preston and Chorley all experiencing average annual growth above national rates. Along with South Ribble, these areas account for 42% of the rise in population seen across Lancashire.
- Blackburn and Pendle has also experienced some of the highest growth in population – combined Blackburn and Pendle account for one fifth of total population growth.
- Across Lancashire’s 12 districts and 2 unitaries, 6 areas experienced growth below the regional rate of 0.4% a year (Lancaster, West Lancashire, Rossendale, Hyndburn, Burnley, and Blackpool).
 - Population in Blackpool has shrunk by 4,400 over the last three decades – the only area where population has fallen over this period.

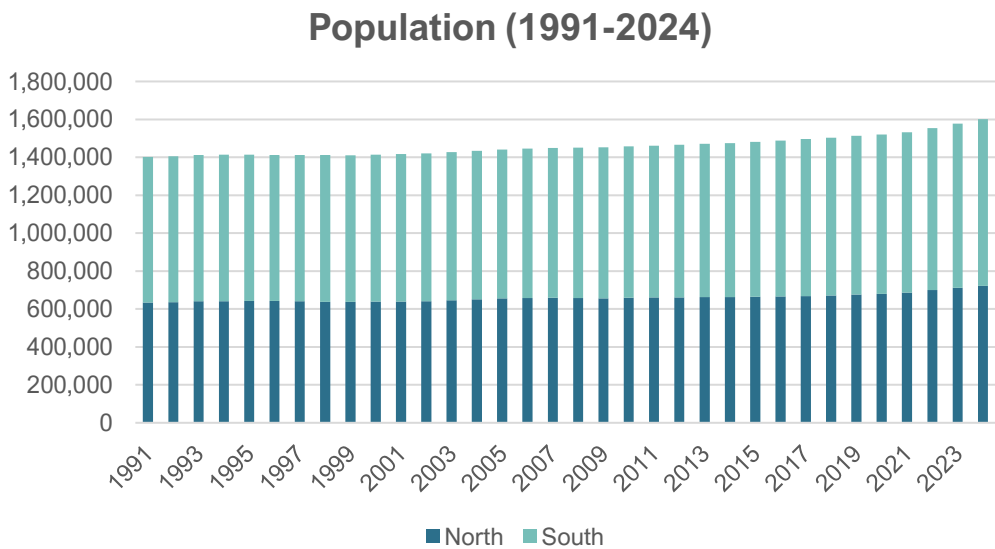


Source: Population estimates – local authority based by single year of age, ONS, 2025

Population – 2UA

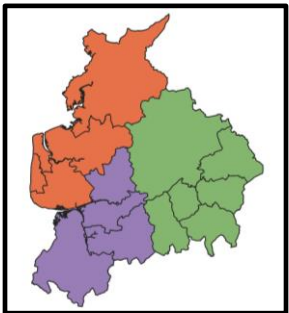


- Population in the two proposed authorities have both grown at 0.4% a year between 1991 and 2024.
- South has a bigger population, growing by over 110,000 from 767,950 to 879,600 between 1991 and 2024.
- Over the same period, population in North Lancashire has grown by 87,500 from 634,500 to 722,050 between 1991 and 2024.
- South Lancashire continues to have a bigger proportion of overall population of 55% compared to 45% in North Lancashire.

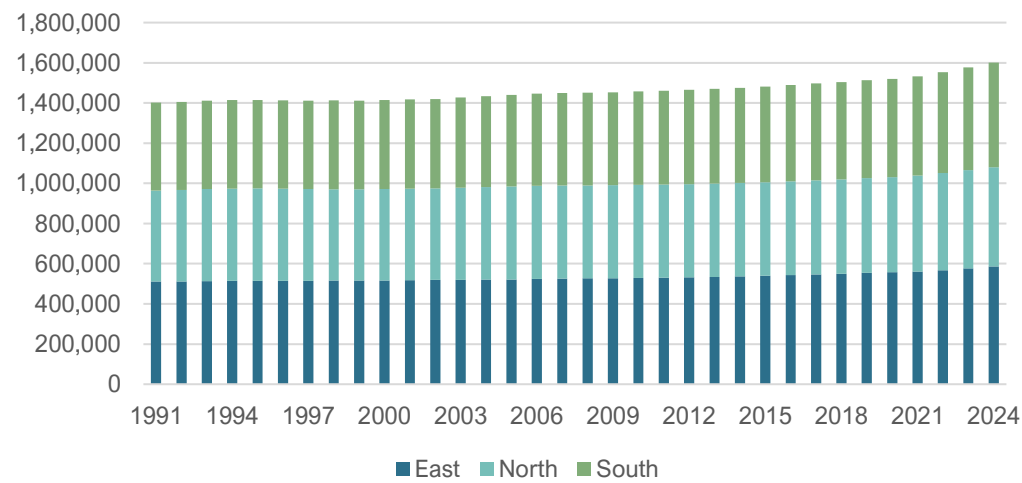


Source: Population estimates – local authority based by single year of age, ONS, 2025

Population – 3UA



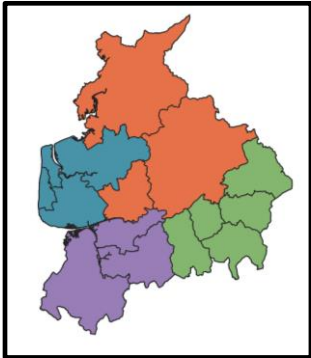
Population (1991-2024)



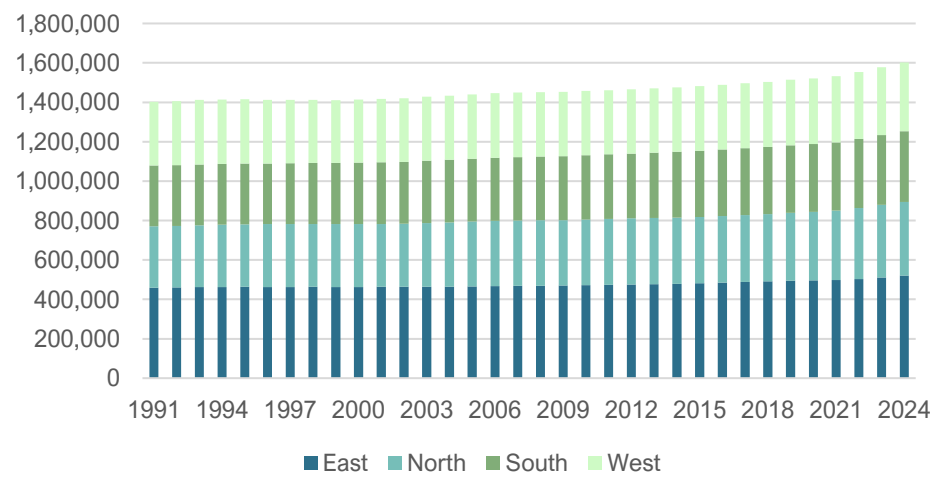
- East Lancashire has the largest population, growing by an average of 0.4% a year between 1991 and 2024, growing by 75,000 from 511,100 to 586,400. In 2024, East Lancashire accounted for 37% of total population.
- South Lancashire has seen the fastest growth in population of 0.5% a year between 1991 and 2024, growing by 83,000 from 438,600 to 521,800. South Lancashire accounts for just under a third of total population.
- North Lancashire has seen the slowest growth of the three proposed authorities of 0.3% between 1991 and 2024, growing by around 40,000 from 452,700 to 493,400. North Lancashire accounts for 31% of total population.

Source: Population estimates – local authority based by single year of age, ONS, 2025

Population – 4UA



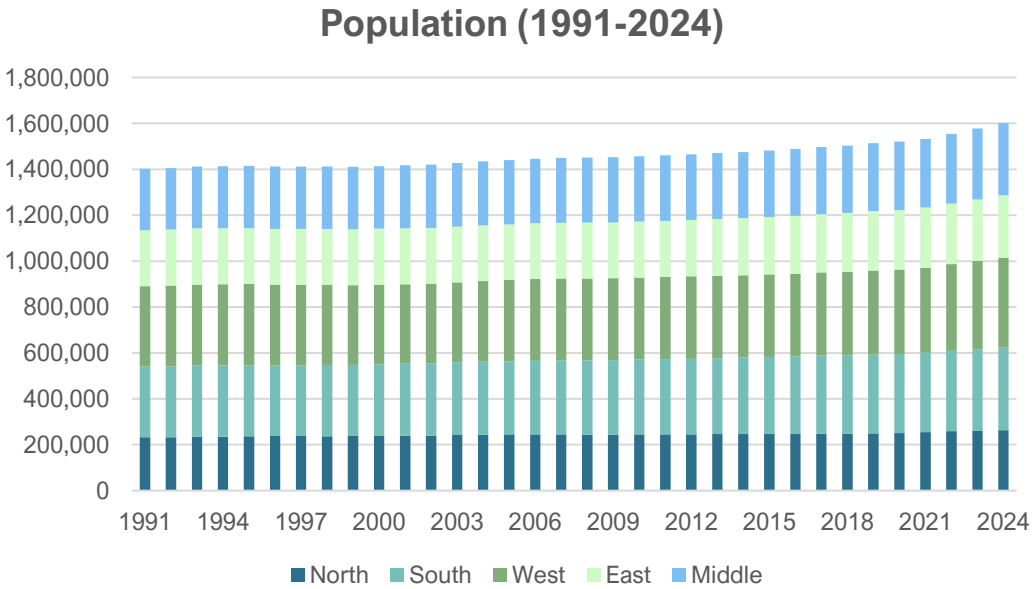
Population (1991-2024)



- East Lancashire has the largest population of the proposed four authorities growing by 61,000 from 459,300 to 520,700 between 1991 and 2024 – an average of 0.4% a year. East Lancashire accounts for around a third of the total population.
- North, South and West Lancashire all have similar population sizes between ~350,000-375,000, contributing between 22-23% of total population.
 - North Lancashire has seen the fastest growth of the four proposed authorities of 0.6% a year, growing by 62,000 from 311,400 to 373,700 between 1991 and 2024.
 - South Lancashire has seen average growth of 0.5% a year over the last 30 years, growing by 50,000 from 308,600 to 359,000.
 - West Lancashire has seen the slowest growth in population of 0.2% a year, growing by 25,000 from 323,100 to 348,400.

Source: Population estimates – local authority based by single year of age, ONS, 2025

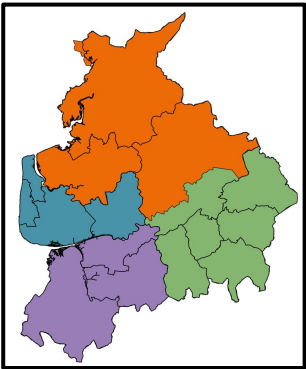
Population – 5UA



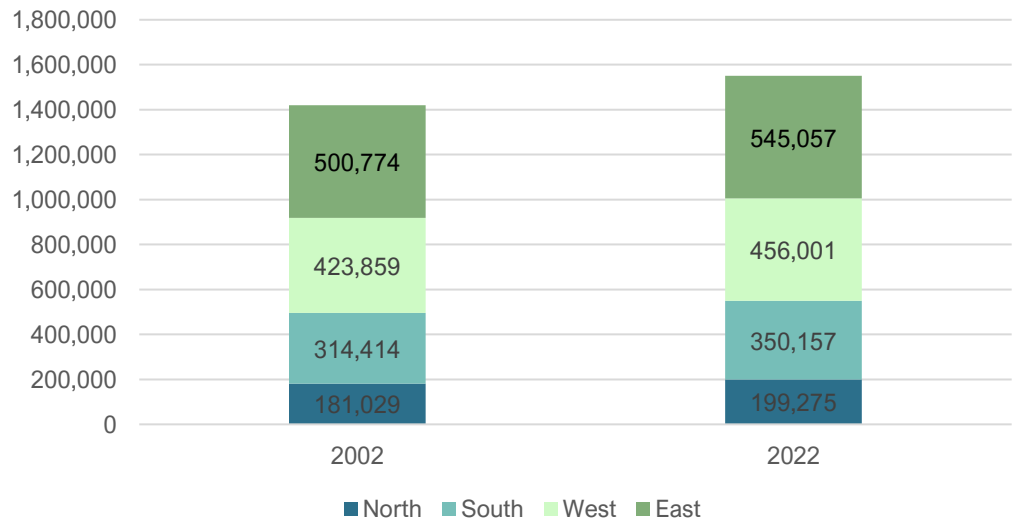
- West and South Lancashire have the highest populations, combined contributing just under half of total population in Lancashire.
 - West has the highest population growing by an average of 0.3% from 350,600 in 1991 by over 40,000 to 392,500 in 2024.
 - South has seen faster growth of 0.5% a year from 308,600 by 50,000 to 359,000.
- Middle Lancashire accounts for around a fifth of total population in Lancashire, growing by an average of 0.5% a year from 267,800 in 1991 by 46,600 to 314,400 in 2024.
- North and East Lancashire make up the remaining third of population, each contributing around 17%.
 - Population in North Lancashire has grown by 0.4% a year from 232,100 in 1991 by 31,600 to 263,700 in 2024.
 - East Lancashire’s population has grown by 0.3% a year from 243,300 in 1991 by 28,700 to 272,100 in 2024.

Source: Population estimates – local authority based by single year of age, ONS, 2025

Population – 4UA B



Total population (2002-2022)



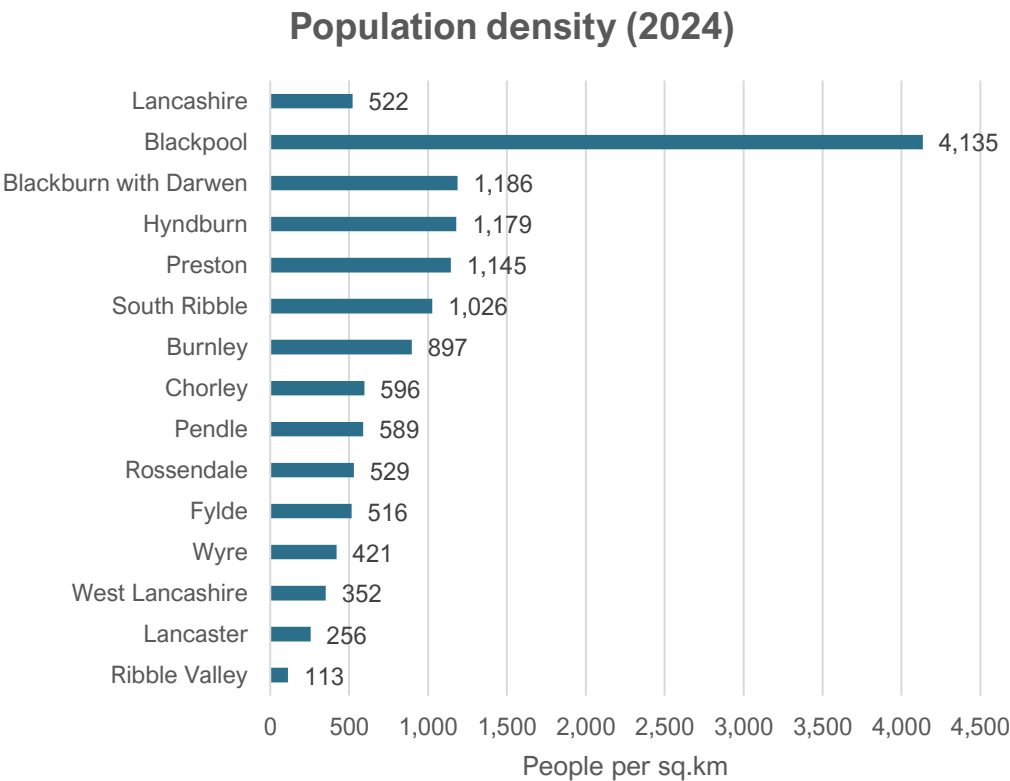
- East Lancashire has the largest population of the proposed four authorities growing by 45,000 from just over 500,000 to 545,000 between 2002 and 2022 – average growth of 0.4% a year. East Lancashire accounts for 35% of the total population.
- West Lancashire has the next biggest population growing by over 32,000 from 424,000 to 456,000 between 2002 and 2022 – average growth of 0.4% a year. West Lancashire accounts for around 29% of total population.
- Combined East and West Lancashire account for almost two thirds of total population.
- South Lancashire’s population has grown by almost 36,000 between 2002 and 2022 from 314,500 to 350,000 – 0.5% average a year, along with North the fastest across UAs. South Lancashire makes up just under a quarter (23%) of total population.
- North Lancashire has the lowest population, growing from 181,000 to 199,000 between 2002 and 2022 – average growth of 0.5% a year. North makes up only 13% of total population in Lancashire.

Source: Ward-level population estimates, ONS, 2024

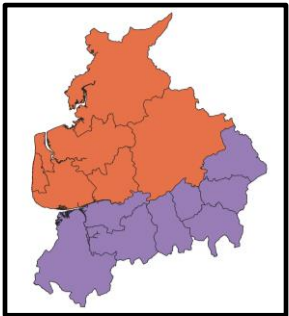
Population density

There are five areas which have around double the number of people per sq. km than the regional average of 548, with Blackpool having by far the densest concentration of population in Lancashire.

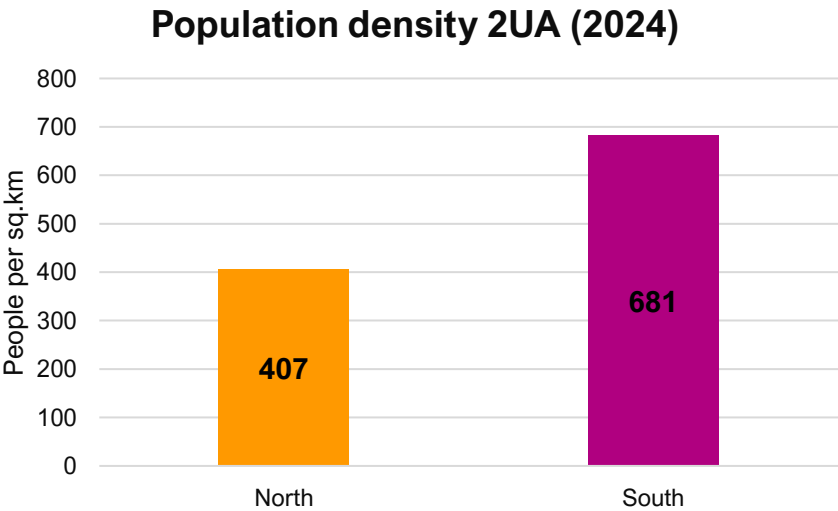
- Population density (number of people per sq. km) has increased in Lancashire (12 districts and 2 unitaries) has 477 to 522 between 2011 and 2024, matching the rise seen nationally and regionally.
- Compared to the national average, Lancashire is densely populated with 522 people per sq.km compared to 409 across England and Wales. Population density is broadly in line with the 548 average regionally.
- There is wide variation across Lancashire, with five districts having a population density above 1,000 – Blackpool is by far the most densely populated area in Lancashire at over 4,100 people per sq.km despite a slight fall in total population since 1991. Blackburn, Hyndburn, Preston, and South Ribble are also more densely populated, around double the number of people per sq. km compared to the regional average.
- Only three of Lancashire’s districts are more sparsely populated than compared to the national average – West Lancashire, Lancaster, and Ribble Valley, which is also the largest district by area.



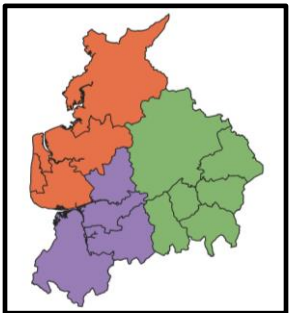
Population density – 2UA



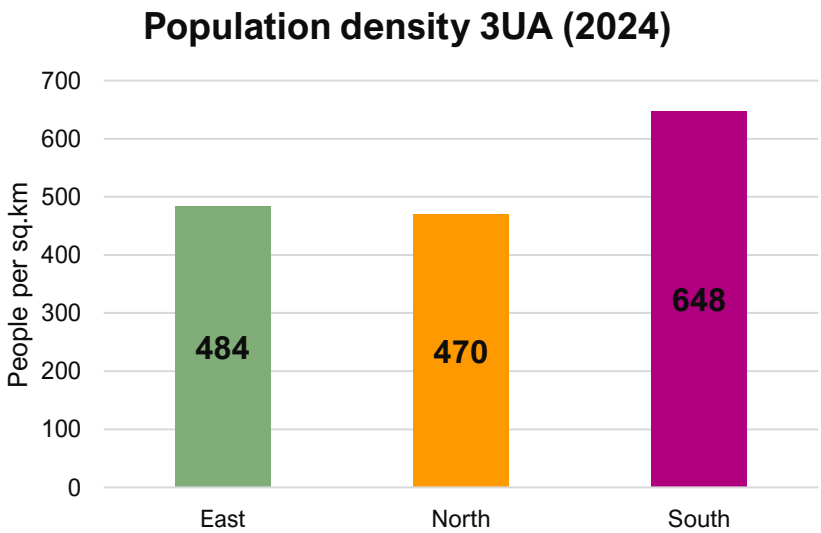
- South has a higher population – 879,600 compared to 722,045 in the North, and higher population density with 275 more people per sq.km.



Population density – 3UA

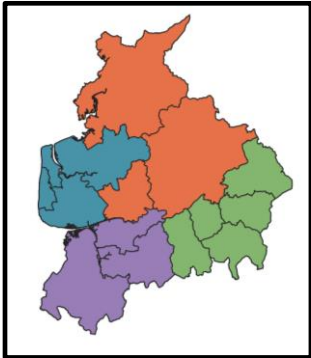


- South has the highest population density but the gap to the North, which has the lowest population density, of 175 people per sq.km, is the lowest across LGR options.
- The lowest population density in the 3UA option of 470 people per sq.km in the North is above the lowest in all other options.

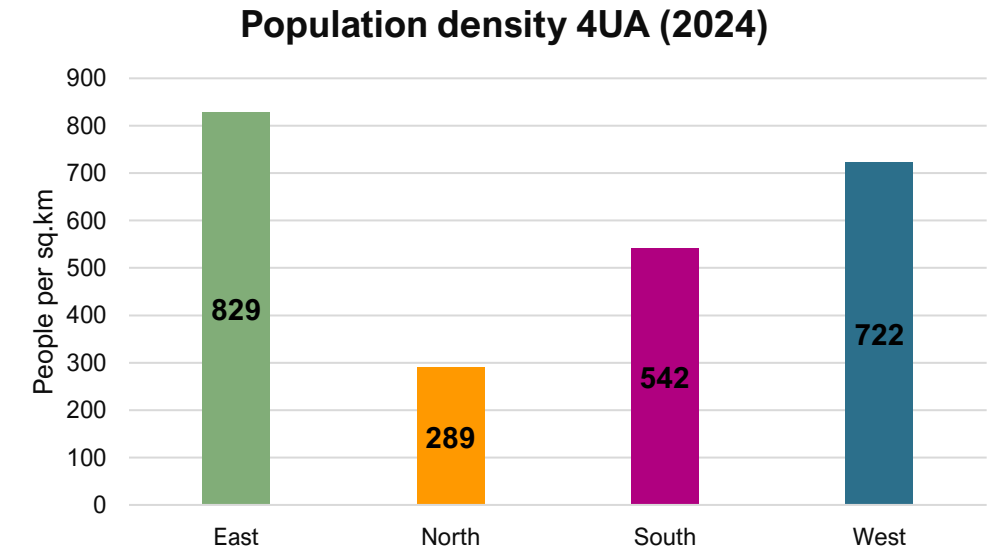


Source: Population estimates for the UK, England, Wales, Scotland and Northern Ireland: mid-2024, ONS

Population density – 4UA



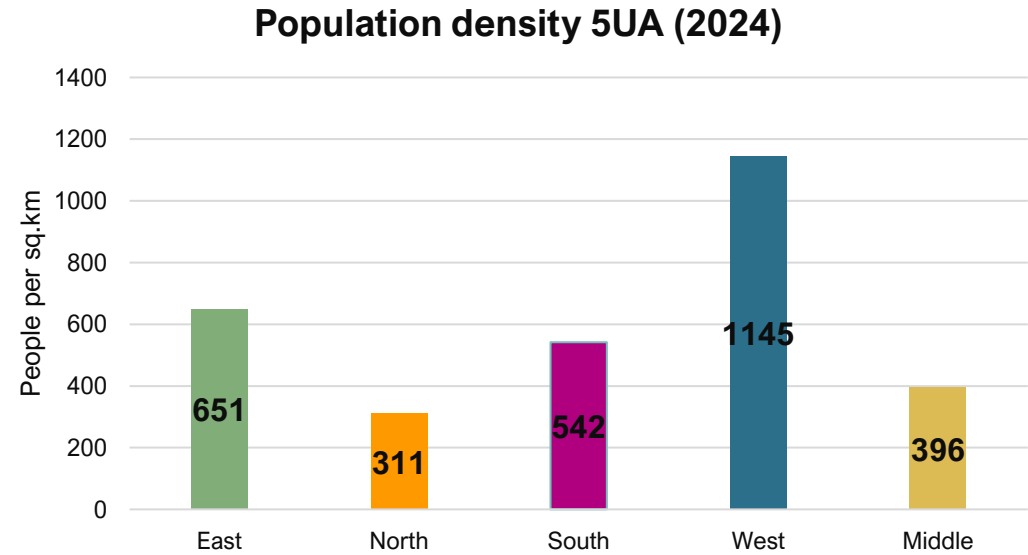
- A large gap of 540 people per sq.km between East with highest and North with lowest population density.
- North 4UA has one of the lowest population densities of 289 people per sq.km. across options.



Population density – 5UA

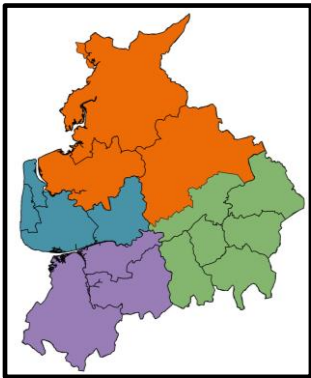


- East 5UA has one of the highest population densities across all options of 1,145 people per sq.km.
- Lowest population density in North of 311 people per sq.km.
- A gap of 834 people per sq.km between West with the highest and North with the lowest population density – one of most uneven splits of population across options.

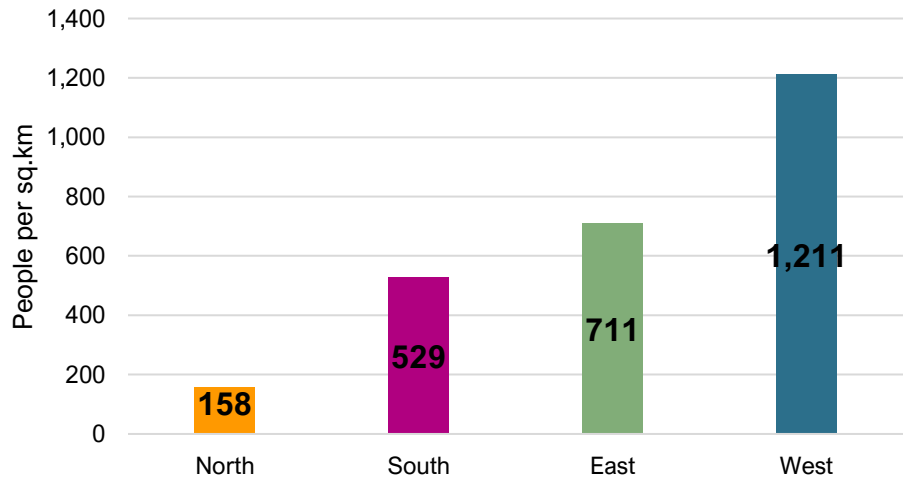


Source: Population estimates for the UK, England, Wales, Scotland and Northern Ireland: mid-2024, ONS

Population density – 4UA B

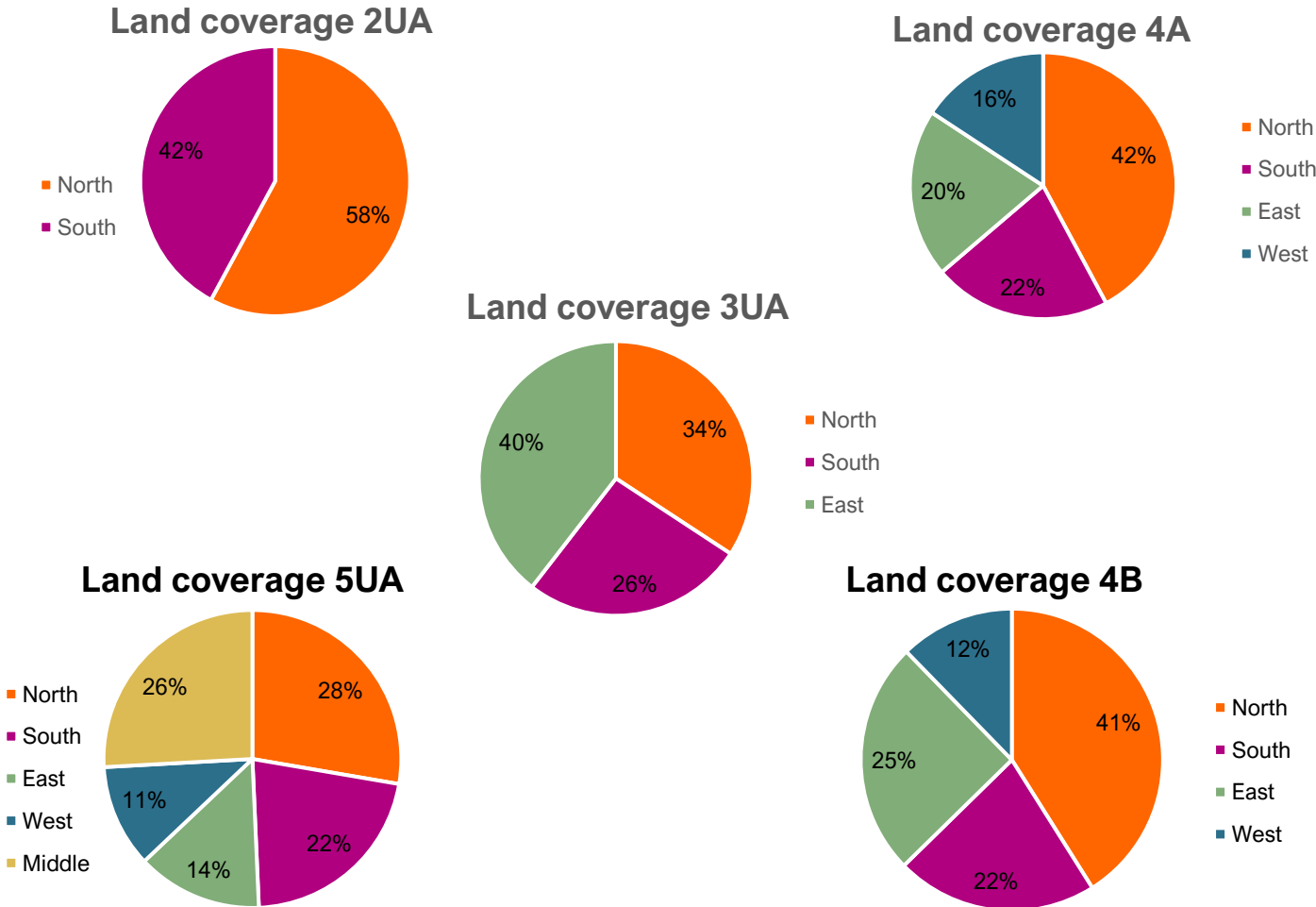


Population density 4UA B (2022)



- Variation in population density with West having the highest population density of over 1,000 people per sq.km followed by 700 in East – the two areas with the highest populations have the highest population densities.
- North has the smallest population and the lowest population density of 158 people per sq.km – this is lower than the lowest population densities in other models.
- Difference in population density between West with the highest and North with lowest is over 1,000 people per sq.km – the most uneven split of population across options.

Land coverage

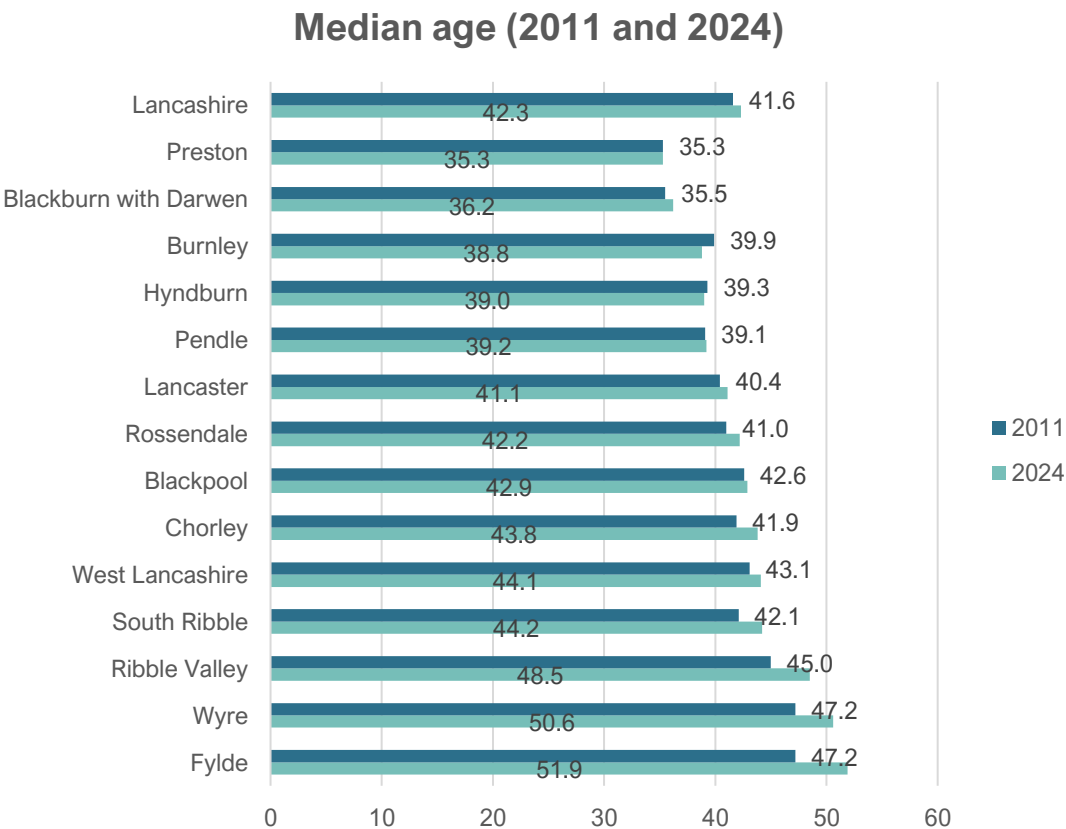


- Northern areas in all models tend to have the largest land mass.
- 3UA has the least variation in land coverage across the UAs.
- The 4UA options have the largest variation in land coverage between authorities, with similar land coverage across authorities in both the four options.
- Although there is more variation between North and West in 4B than 4A.

Median age

Median age of the population has increased from 41.6 years old to 42.3 across Lancashire, reflective of wider ageing trends seen nationally. Although this is not experienced across all areas in Lancashire.

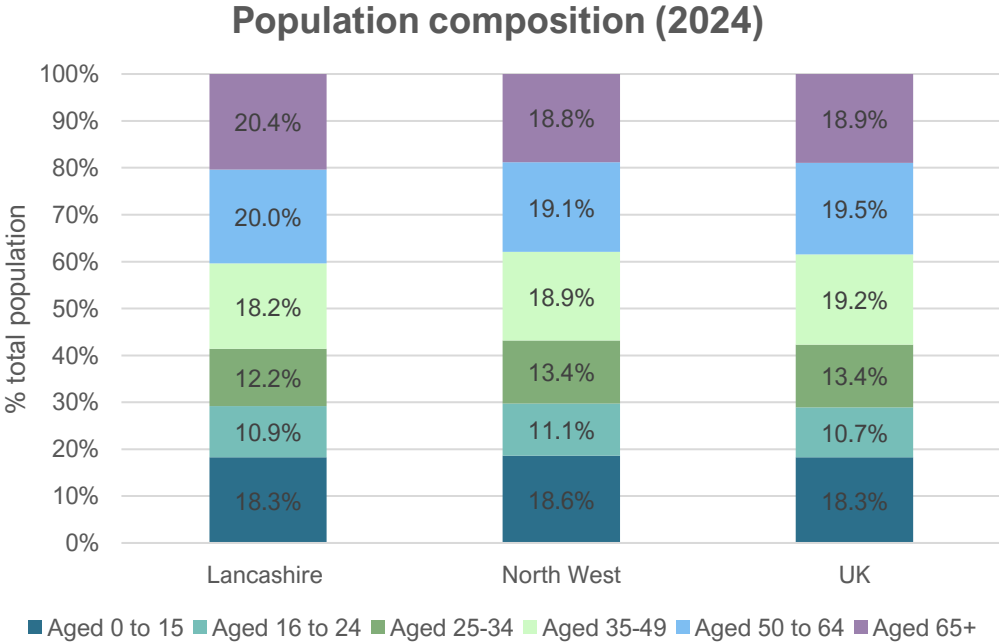
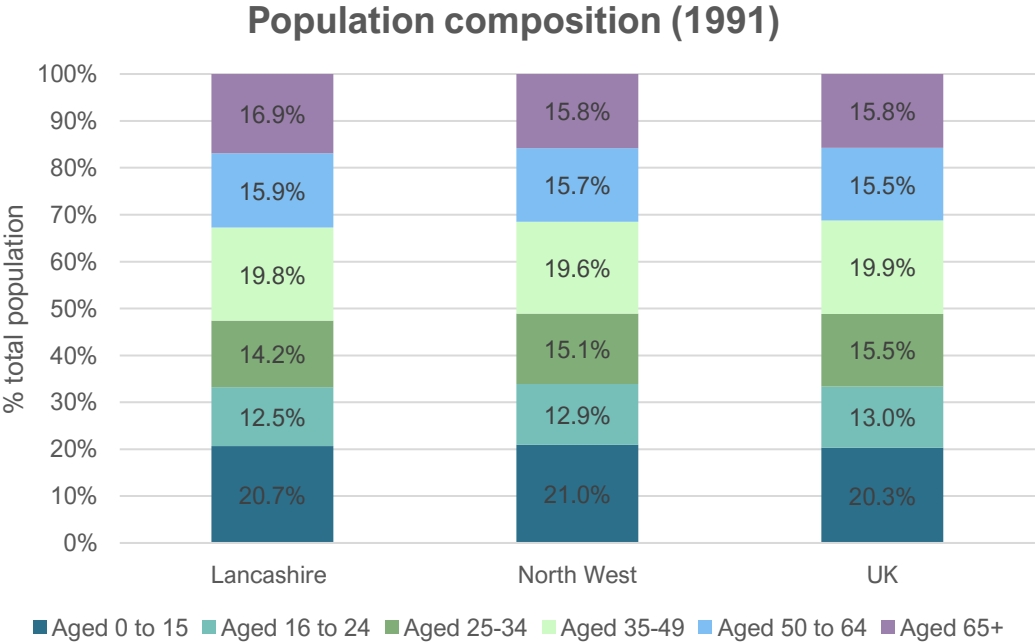
- Median age in Lancashire (County Council) has risen from 41.6 years to 42.3, older than 40 years old regionally and nationally. Regionally median age has not risen since 2011, nationally it has risen from 39.5 to 40.3 years.
- Fylde, Wyre, and Ribble Valley have all continued to see their populations age over recent years, with median age in these districts approaching or over 50 years.
 - South Ribble, West Lancashire, and Chorley also have a high median age compared to national and regional averages
- Blackburn and Preston have the youngest populations in Lancashire, at least four years younger than the national average.
- Although median age has risen at the Lancashire level, some areas have seen only a very slight rise or fall. These tend to be areas with a relatively young median age:
 - Burnley and Hyndburn have seen a fall in median age, particularly in Burnley. Preston and Pendle have seen little to no change in median age of their respective populations.



Source: Population estimates for the UK, England, Wales, Scotland and Northern Ireland: mid-2024, ONS

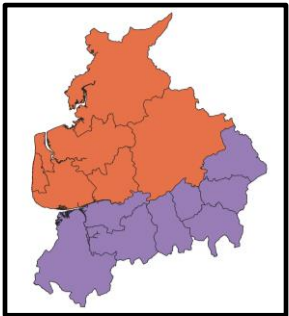
Population composition

As shown on the last slide, Lancashire’s population has been ageing over the last three decades, and this is shown again on this slide, with an increase in the proportion of the population aged 50 and over in Lancashire reflective of wider trends seen nationally, although Lancashire has a higher proportion aged 50 and over. 61% of the population are of working age across Lancashire, slightly below 62.5%-63% regionally and nationally. The rise in population is largely down to increases in the number of people aged 50 and over. Since 1991, there has been a rise in the number of people aged 50 and 64 by 1.1% a year (in line with 1.0%-1.3% rise regionally and nationally), and those aged 65 by 1% a year (in line with 0.9%-1.1% rise regionally and nationally). There has only been a 0.4% rise in the working age population, but this is in line with trends seen regionally and nationally.



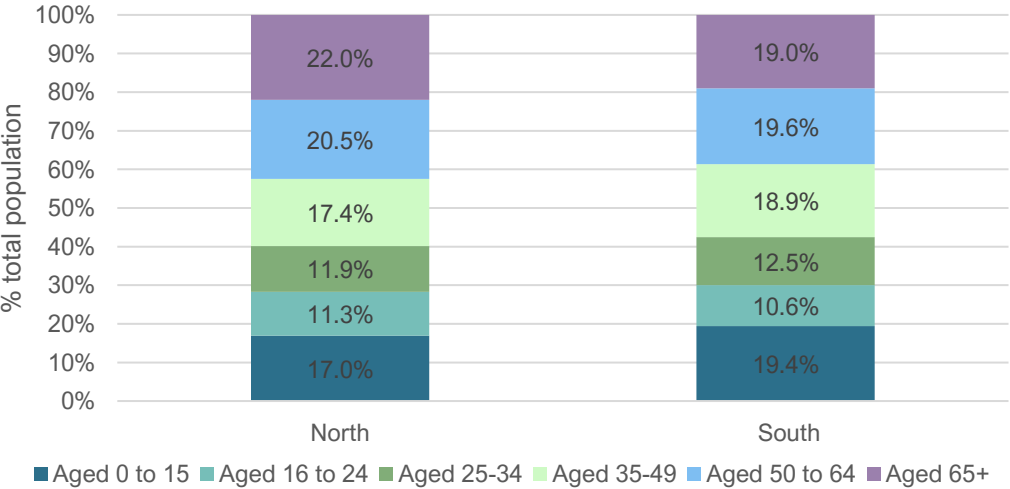
Source: Population estimates – local authority based by single year of age, ONS, 2025. Latest estimates for UK are 2023

Population composition – 2UA



- Population in North Lancashire is older than in the South with 42.5% aged 50 and older compared to 38.6% in the South.
- But the population in the South has been ageing more quickly as seen by 1.2% annual growth in those aged 50 and over and a slight decline in the number of people in younger age bands.
- There is not much difference in the working age population – 61.6% of the population are of working age in South Lancashire compared to 61.1% in the North.

Population composition 2UA (2024)

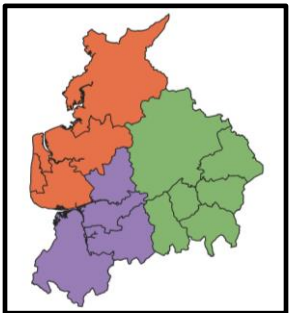


Change (1991-2024)

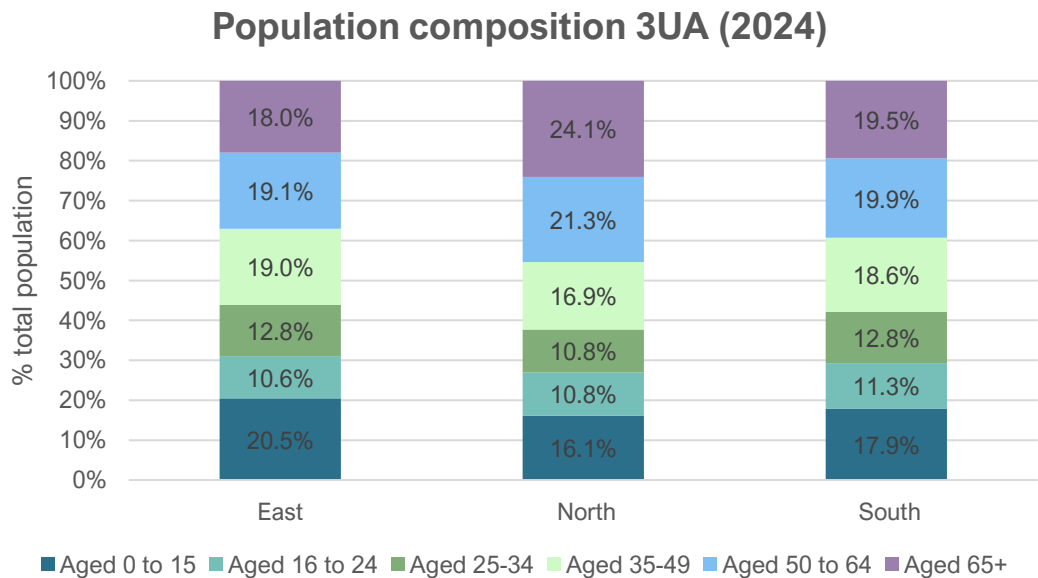
Age band	North	South
0-15	0.1%	0.0%
16-24	0.1%	-0.1%
25-34	0.0%	-0.1%
35-49	0.1%	0.2%
50-64	1.0%	1.2%
65 and over	0.8%	1.2%

Source: Population estimates – local authority based by single year of age, ONS, 2025

Population composition – 3UA



- North Lancashire has by far the oldest population of the three unitaries – almost a quarter are aged 65 and over, and 44.5% aged 50 and over; this is around 40% in South Lancashire and 37% in East Lancashire.
- The population has been ageing most quickly in the South although the proportion aged 50 and over is around the regional and national average.
- East Lancashire has the youngest population with one fifth aged under 16 and the lowest proportion aged 50 and over.
- South Lancashire has the highest working age population at 62.6% compared to 61.5% in East Lancashire, and less than 60% in North Lancashire.



Change (1991-2024)

Age band	East	North	South
0-15	0.1%	0.0%	0.0%
16-24	0.0%	0.0%	0.0%
25-34	0.0%	-0.3%	0.0%
35-49	0.3%	-0.1%	0.2%
50-64	1.2%	0.9%	1.3%
65 and over	0.9%	0.7%	1.5%

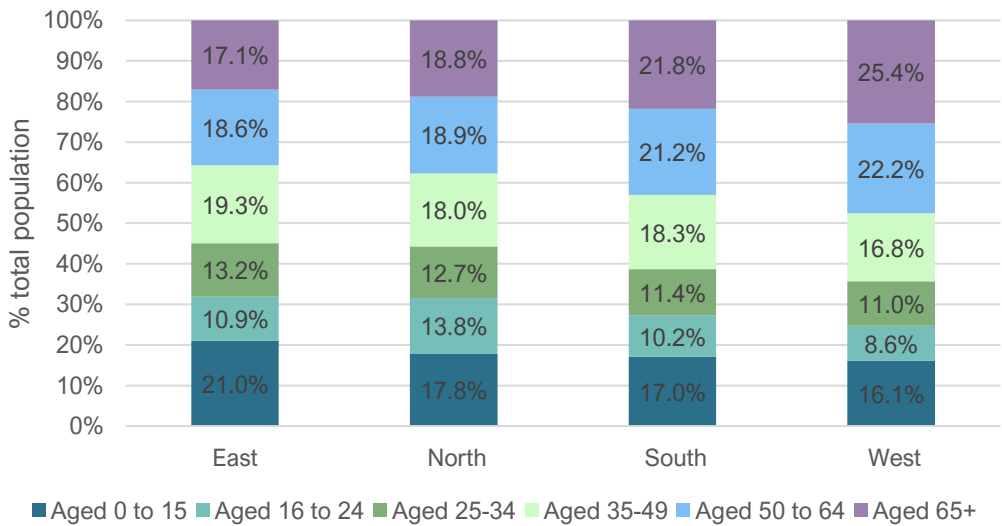
Source: Population estimates – local authority based by single year of age, ONS, 2025

Population composition – 4UA



- West Lancashire has by far the oldest population of the proposed four unitaries with over a quarter of the population aged 65 and over, and 48% aged 50 and over. The next oldest population is South Lancashire with 42% aged 50 and over. East Lancashire has a relatively young population and North Lancashire’s population is relatively in line with regional and national averages.
- South Lancashire’s population has been ageing most quickly, with the number of people aged 65 and over increasing by almost 2% a year – the increase in all other areas has been below regional and national rates but as mentioned, West Lancashire already has a relatively old population.
- North Lancashire has the highest working age population at 63.5%, West Lancashire the lowest at 58.5%.

Population composition 4UA (2024)



Change (1991-2024)

Age band	East	North	South	West
0-15	0.1%	0.2%	-0.2%	0.0%
16-24	0.0%	0.5%	-0.2%	-0.5%
25-34	0.0%	0.2%	-0.3%	-0.2%
35-49	0.3%	0.4%	-0.1%	-0.2%
50-64	1.1%	1.1%	1.4%	0.9%
65 and over	0.7%	0.8%	1.9%	0.7%

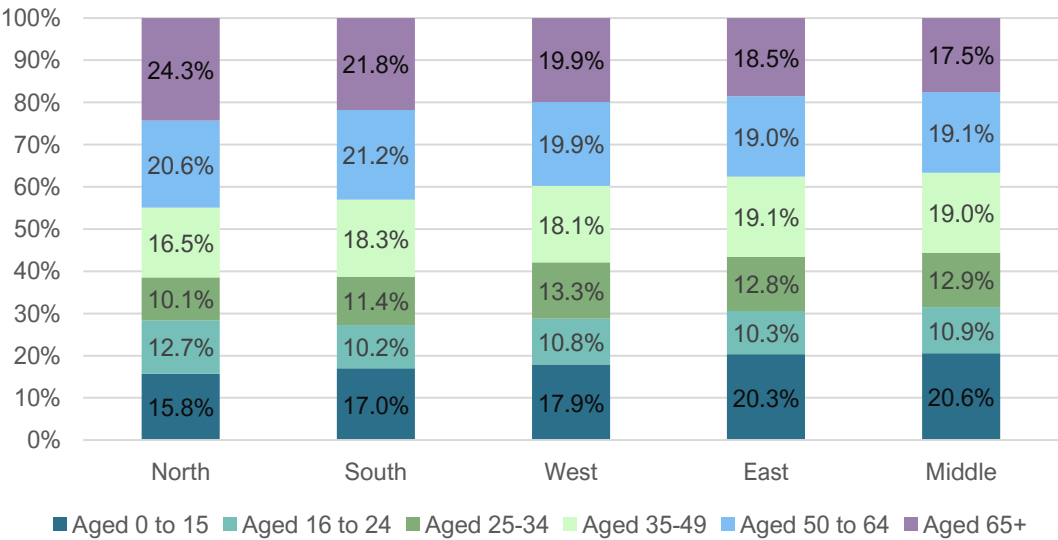
Source: Population estimates – local authority based by single year of age, ONS, 2025

Population composition – 5UA



- North Lancashire has the oldest population of the proposed five unitaries with almost a quarter aged 65 and over, and 45% aged 50 and over. South Lancashire has the next oldest population with 42% aged 50 and over. Middle and East Lancashire have the youngest populations with a fifth of respective populations aged under 16 and relatively low proportions aged 65 and over. West Lancashire also slightly older than regional average.
- North has lowest working age populations of 60%. Only West and Middle have working age proportion fairly in line with regional average.
- North has oldest population and aged most quickly with the proportion of people aged 65 and over rising by 2% a year. The increase in all other areas has been below regional and national rates, but South and West have relatively old populations compared to regionally.

Population composition 5UA (2024)



Change (1991-2024)

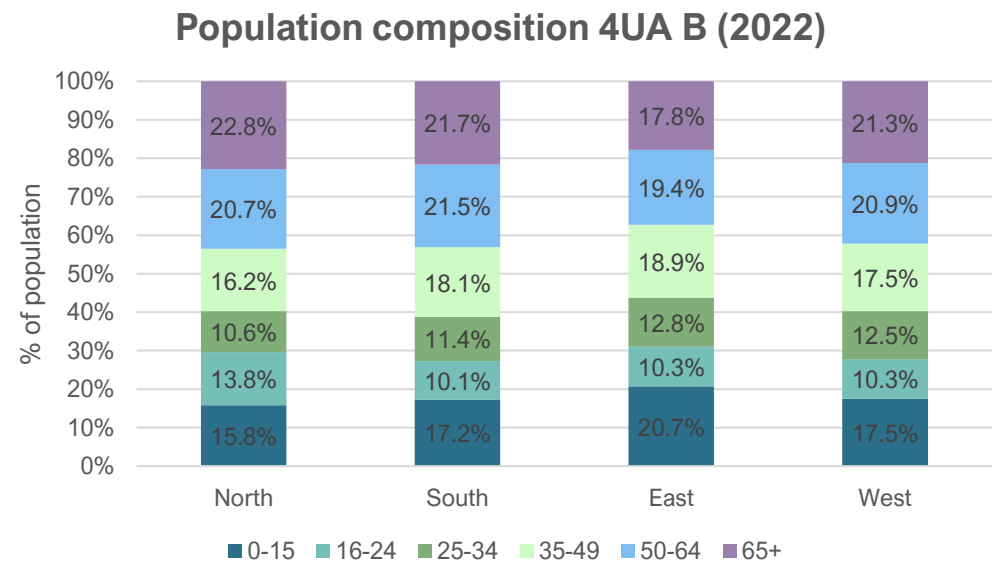
Age band	East	North	South	West	Middle
0-15	-0.1%	-0.2%	0.2%	0.0%	0.2%
16-24	0.4%	-0.2%	-0.1%	-0.1%	0.1%
25-34	-0.4%	-0.3%	0.2%	-0.1%	0.1%
35-49	0.0%	-0.1%	0.3%	0.1%	0.4%
50-64	1.0%	1.4%	0.9%	1.1%	1.2%
65 and over	0.9%	1.9%	0.4%	0.8%	0.9%

Source: Population estimates – local authority based by single year of age, ONS, 2025

Population composition – 4UA B



- North has the oldest population with 23% aged 65 and over, and 43% aged 50 and over. But this option does not present a UA with strikingly older population with North, South, and West having between 41%-43% aged 50 and over and each of the UAs having around 61% of the population of working age.
- Although population has been ageing most quickly in the South with over a 2% rise each year in the number of people aged 65 and over during the last two decades.
- East has the youngest population with over a fifth aged under 16, only 18% aged over 65, and 38% aged over 50.



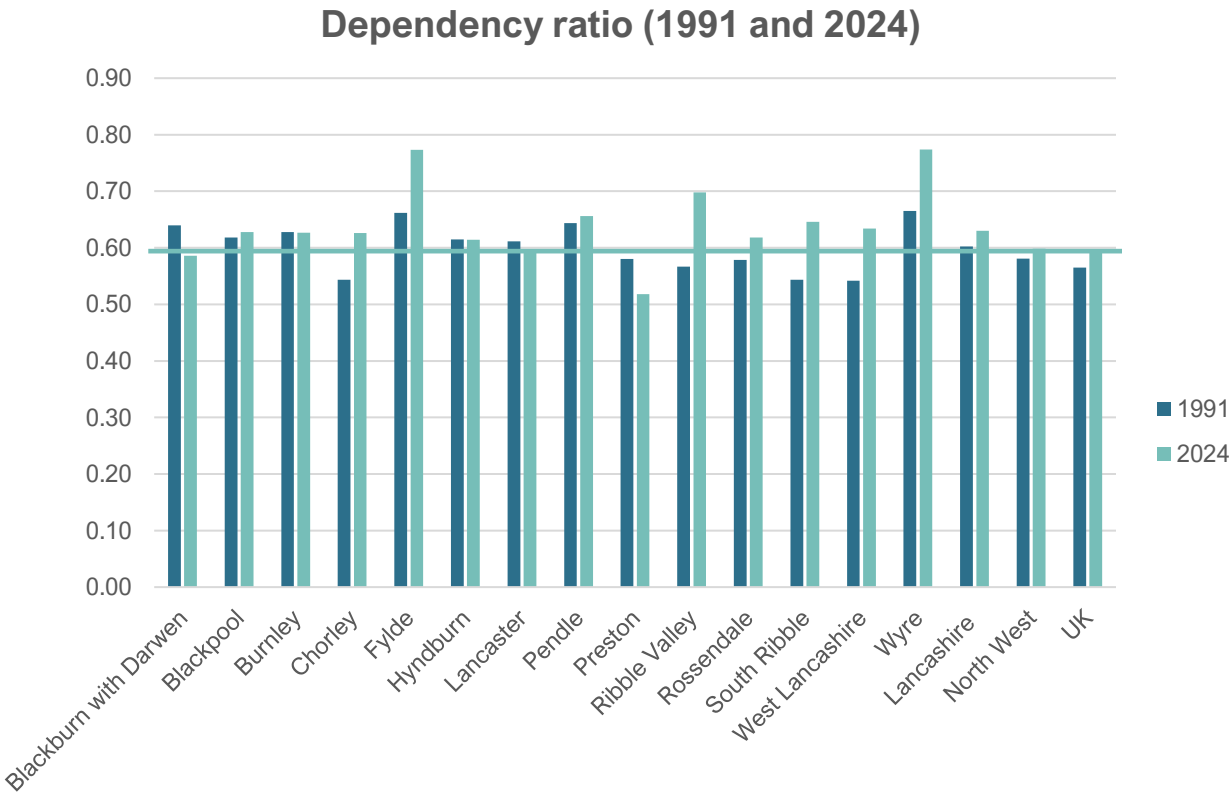
Change (2002-2022)				
Age band	North	South	East	West
0-15	-0.2%	-0.2%	0.0%	0.0%
16-24	0.6%	0.5%	0.2%	0.2%
25-34	0.2%	0.0%	0.2%	0.4%
35-49	-0.6%	-0.5%	-0.1%	-0.4%
50-64	1.0%	0.9%	1.0%	1.1%
65+	1.6%	2.3%	1.4%	0.9%

Source: Ward-level population estimates, ONS, 2024

Population – dependency ratio

At the total Lancashire level, the dependency ratio is higher than regionally and nationally, indicating there be additional strain placed on the economy by fewer people working and more people requiring support for health care, social services and pensions

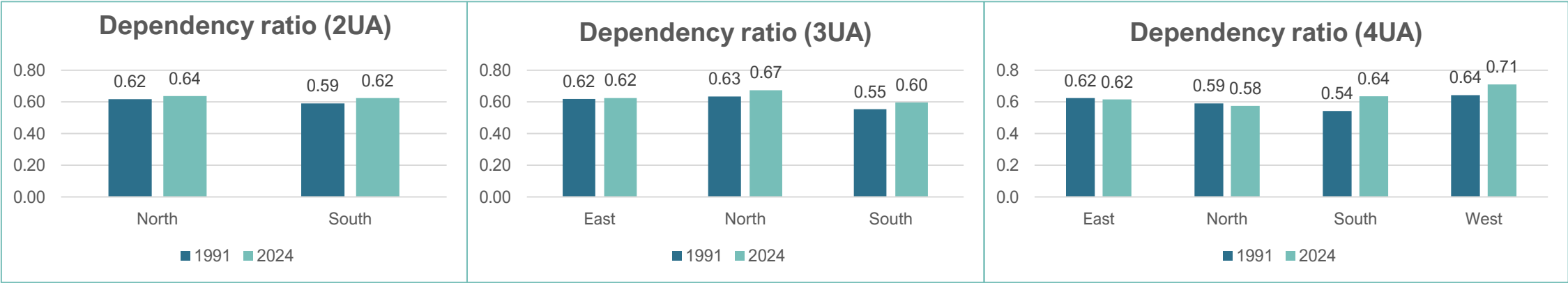
- The chart to the right shows the dependency ratio for Lancashire, 12 districts and 2 unitaries, and regional and national averages. This shows the ratio of the people not in the labour force (those aged 16 and under and those aged 65 and over) compared to those of working age.
- Most areas have seen an increase in the dependency ratio indicating the working age population has more economic dependents in which it needs to support.
- The dependency ratio is higher in Lancashire than regionally and nationally. Therefore, there are more people who are not in the labour force compared to the working age population, meaning there are fewer people of working age to support the economy,
- This is particularly down to a rise in the number of people aged 65 and over – the dependency ratio is highest in areas with the highest median age of Fylde, Wyre, and Ribble Valley.
- However, the dependency ratio has declined and is relatively low in Preston and Blackburn.



Population dependency ratio – UA options

The dependency ratio has generally risen across all the possible UA options. Apart from the 2UA and 4UA B options, there is variation in the dependency ratio across the proposed options. A rise in dependency ratio across options is driven by an ageing population.

- **2UA:** a rise in both authorities, with both above the 0.60 regional average and 0.59 national average. Although there is not much difference in the dependency ratio between the authorities, a faster rise for the South indicates a faster rise in the population aged 65 and over, but higher dependency ratio in the North.
- **3UA:** variation between the lowest dependency ratio in South Lancashire at 0.60 and 0.67 in the North. The South in line with regional average.
- **4UA:** wide variation across authorities. North has seen a slight fall in the dependency ratio and is the only option below the regional average. West has the highest dependency ratio and has risen significantly to 0.71. South has seen a pronounced rise with fastest growth in population aged 65 and over.

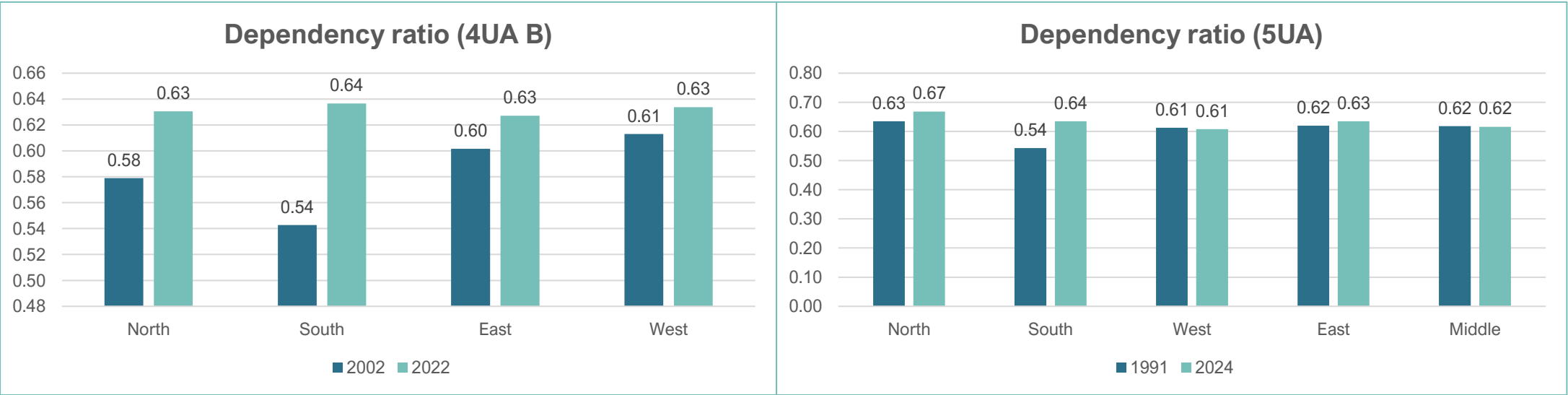


Source: Population estimates – local authority based by single year of age, ONS, 2025

Population dependency ratio – UA options

The dependency ratio has generally risen across all the possible UA options. Apart from the 2UA and 4UA B options, there is variation in the dependency ratio across the proposed options. A rise in dependency ratio across options is driven by an ageing population.

- **4UA B:** all UAs have seen a rise in dependency ratio, which are above the regional average. The sharpest rise in the South driven by a rise of over 2% a year in the number of people aged 65 and over, and in the North with a rise in the number of people aged 65 and over by 1.6% a year. But across options, this has the least variation with each UA having a dependency ratio of either 0.63 or 0.64.
- **5UA:** variation across the five proposed authorities with all at or above the North West average of 0.60. North has the highest dependency ratio reflection of having the oldest population. South has seen the sharpest rise in dependency ratio with an increase in both those aged under 16 and aged over 65. East, Middle, and West have not seen much of a rise in the ratio.



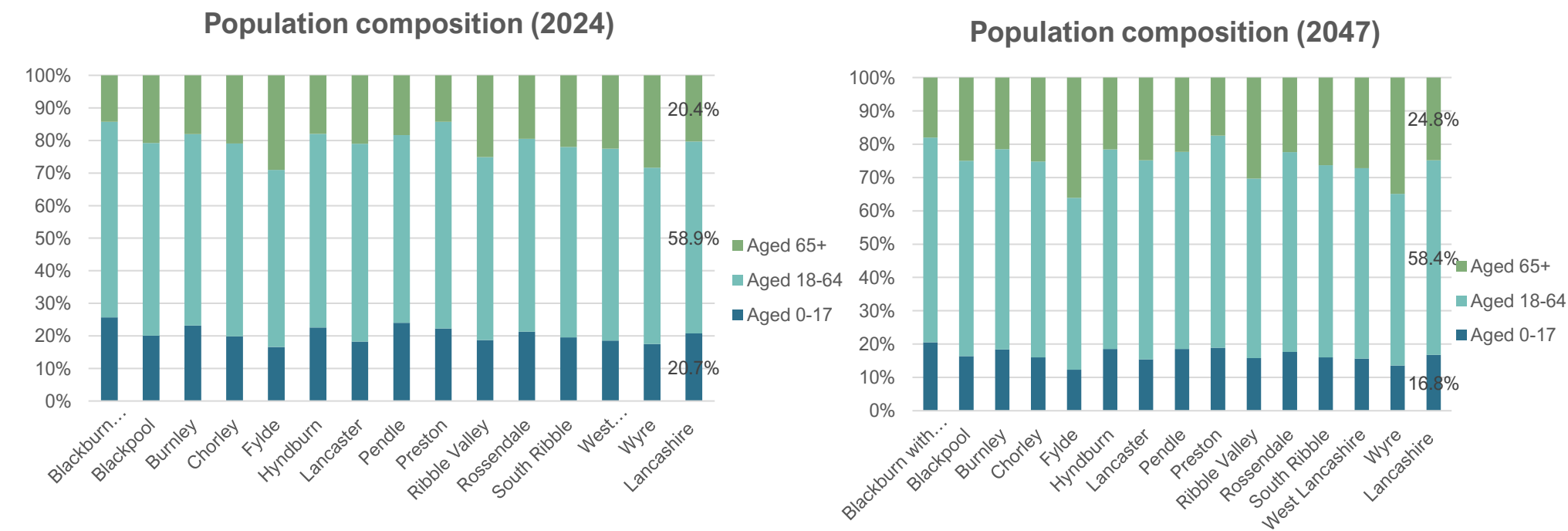
Source: Population Estimates, ONS, 2025; Ward-level population estimates, ONS, 2024

Population projections

Across the whole of Lancashire the population is projected to increase from 1.6m to 1.74m by 2047, much of which is expected to be driven by a continually ageing population – by 2047 around a quarter of the population may be 65 and over, up from 20.4% in 2024.

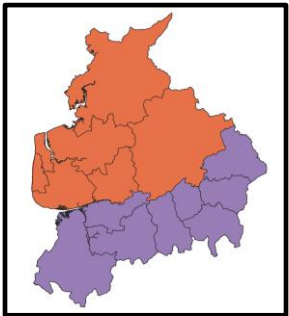
The population is projected to continue growing at a similar rate to the last 30 years, by an average of 0.48% annually. Most of this is in older age groups – the number of people aged under 18 is projected to fall, the working age population is projected to rise by 0.44% a year and the number of people aged 65 and over is projected to rise by 1.3% a year.

All areas are projected to see population continue to age, with the rise in people aged over 50 the driver of population growth.

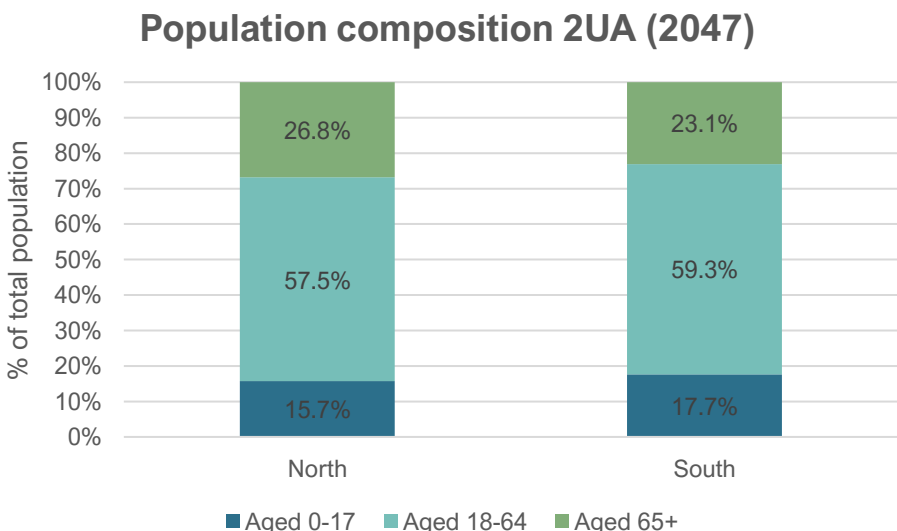
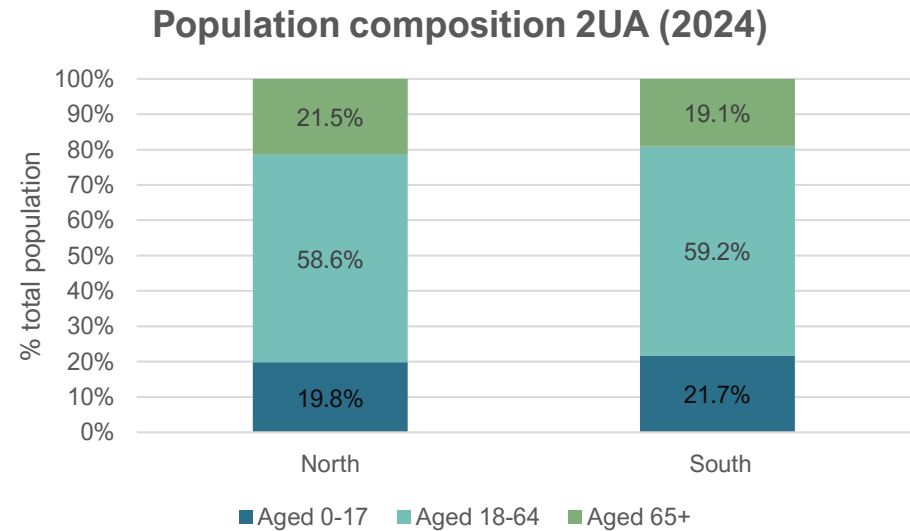


Source: Population estimates – local authority based by single year of age, ONS, 2025; LG Inform Plus via Lancashire LGR Data Working Group

Population projections – 2UA

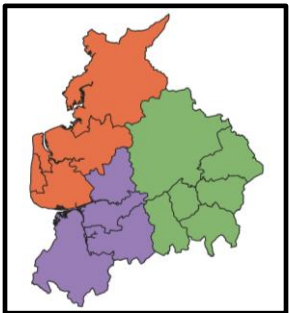


- Total population expected to rise by 0.53% a year in the North, more modest growth of 0.21% in the South. Population in the North is older than in the South and this is projected to continue with over a quarter of the population aged over 65 – driving the overall population increase.
- Working age population projected to rise by 0.43% in North and 0.23% in the South.
- The population in the South has been ageing more quickly but is projected to rise more quickly in the North – the number of people aged 65 and over is projected to rise by 1.40% a year in the North compared to 1.05% in the South.
- Number of people aged under 18 projected to fall -0.35% annually in the North and -0.73% the South.



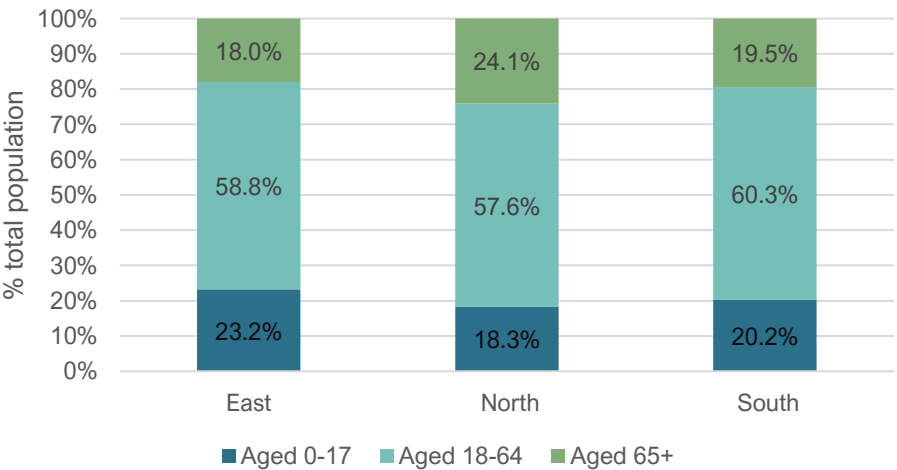
Source: Population estimates – local authority based by single year of age, ONS, 2025; LG Inform Plus via Lancashire LGR Data Working Group

Population projections – 3UA

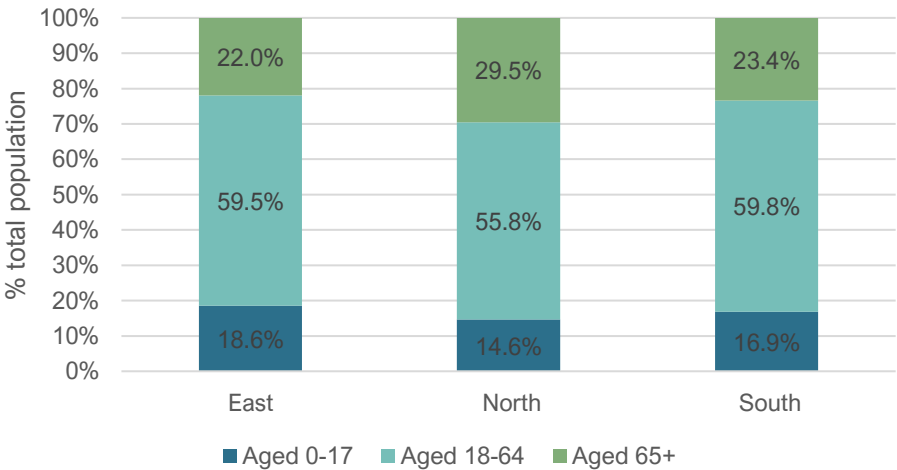


- North has by far the oldest population of the three unitaries and this is projected to continue with almost three in ten aged 65 and over.
- Total population projected to rise by 0.45% annually in the North and South, more modest growth of 0.18% in the East.
- The number of people aged 65 and over expected to rise by 1.3% in the North and South, and 1.1% in East Lancashire, outpacing growth in the working age population between 0.2%-0.4% annually.
- The number of people aged under 18 is projected to fall between -0.3 and -0.5% in the North and South, and by -0.8% in the East.

Population composition 3UA (2024)

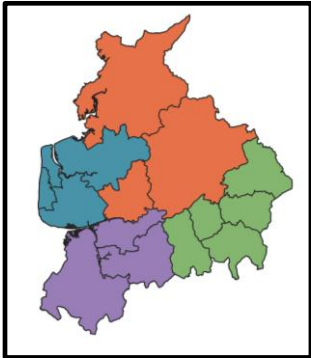


Population composition 3UA (2047)



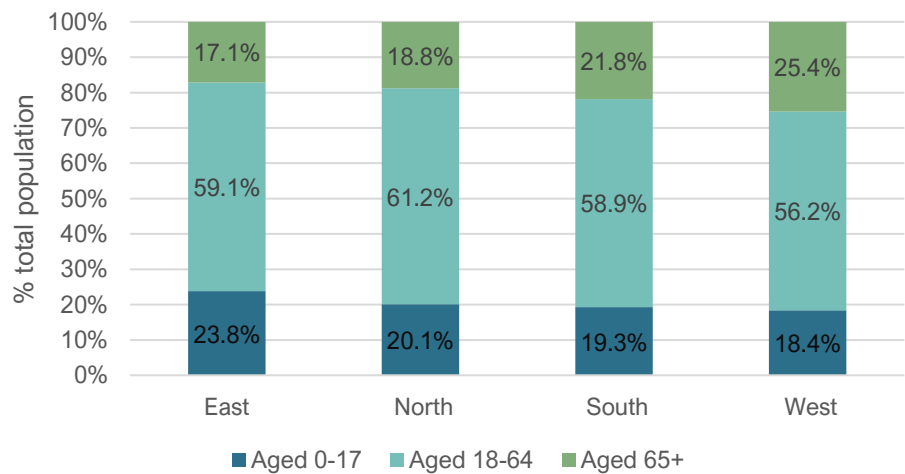
Source: Population estimates – local authority based by single year of age, ONS, 2025; LG Inform Plus via Lancashire LGR Data Working Group

Population projections – 4UA

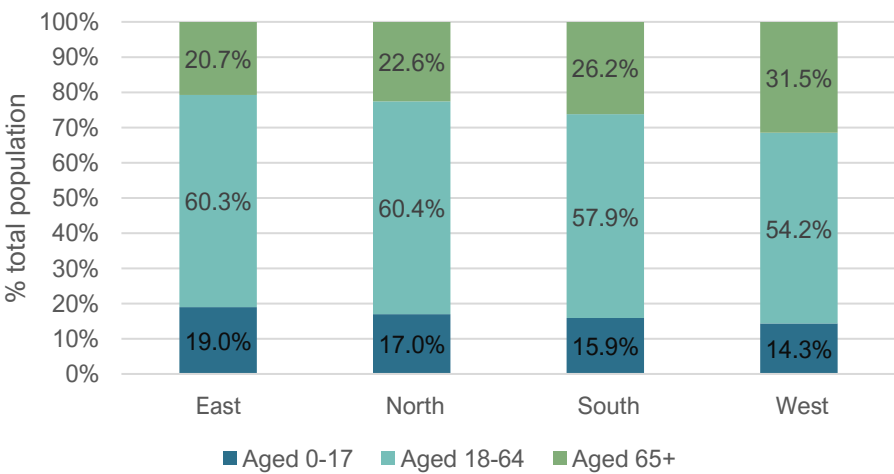


- North, South and West UAs total population projected to rise by between 0.4-0.6% annually, much more modest growth of 0.1% growth in the East.
- West has by far the oldest population of the proposed four unitaries and this is projected to continue with more than three in ten people aged 65 and over.
- The number of people aged 65 and over is projected to rise by 1.4% annually in the North and West, 1.2% in the South, and 0.9% in the East, outpacing growth in working age population of 0.5% in the North, 0.3% in the South and West, and 0.2% in the East.
- The number of people aged under 18 is projected to fall strongly by -0.9% a year in the East, between -0.5% and -0.6% in the South and West, and -0.1% in the North.

Population composition 4UA (2024)



Population composition 4UA (2047)

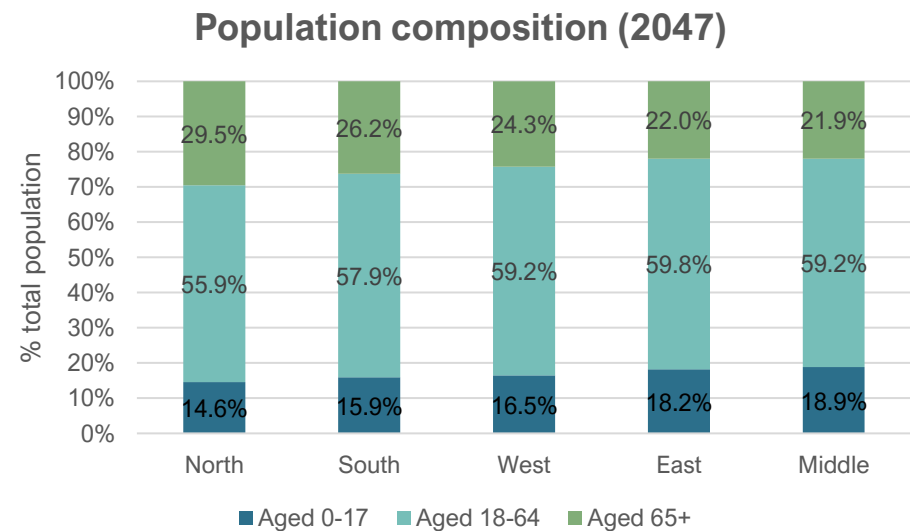
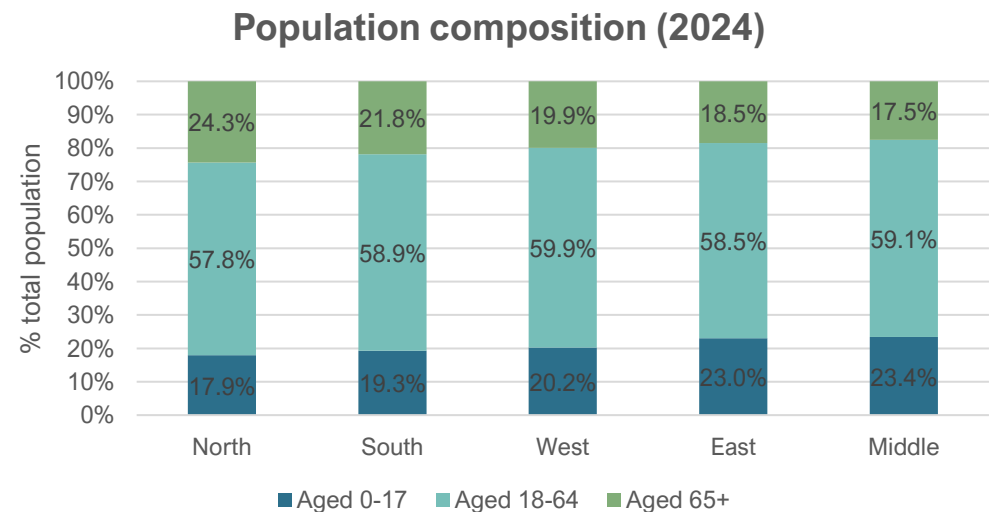


Source: Population estimates – local authority based by single year of age, ONS, 2025; LG Inform Plus via Lancashire LGR Data Working Group

Population projections – 5UA



- North projected to see the fastest rise in total population of 0.55% a year, driven by a rise in those aged 65 and over with almost one in three aged 65 and over in 2047, and a working age population of 56%.
- Over a quarter of people projected to be aged 65 and over in the South. All UAs are projected to see a rise in the number of people aged 65 and over at least 0.9% annually, driving overall rises in total population.
- West and South UAs total population projected to rise by 0.4%-0.5% annually. More modest growth of 0.2% in East and Middle.
- The number of people aged under 18 projected to fall by at least -0.3% annually in all authorities, sharpest falls projected in Middle and East of -0.75% annually.

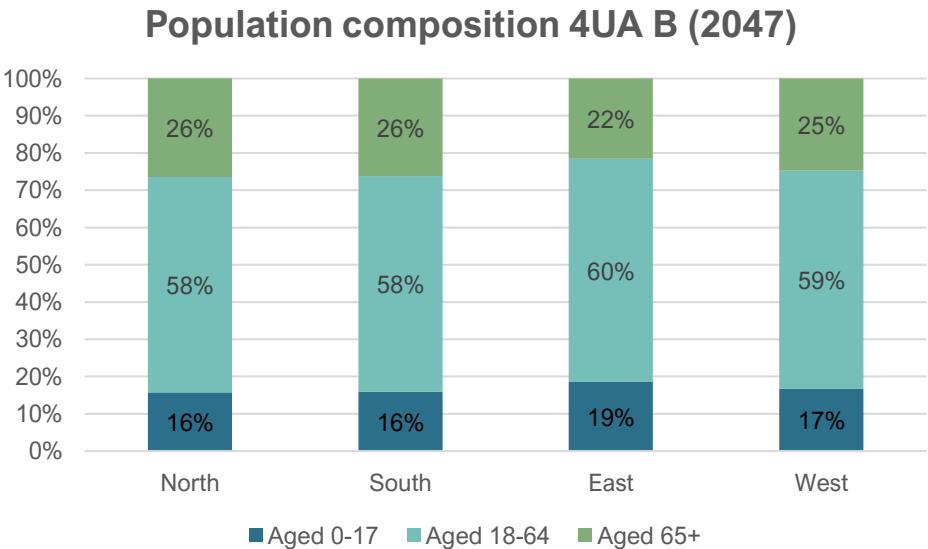
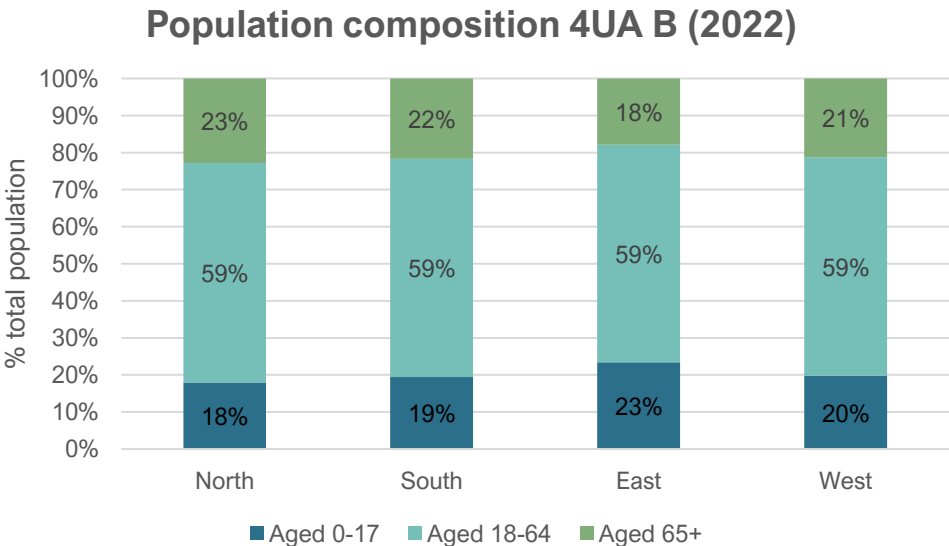


Source: Population estimates – local authority based by single year of age, ONS, 2025; LG Inform Plus via Lancashire LGR Data Working Group

Population projections – 4UA B



- West, North and South UAs total population is projected to rise by between 0.4-0.5% annually, more modest growth of 0.3% growth in the East.
- North has the oldest population but South and West projected to have a similar composition with a quarter of the population projected to be 65 or over. All areas projected to see at least a 1% annual rise in the number of people aged 65 and over, highest of 1.2% in South.
- The number of people aged under 18 is projected to fall strongly by -0.6% a year in East Lancashire, -0.4% in South, between -0.1% and -0.2% in North and West.



Source: Ward-level population estimates, ONS, 2024; LG Inform Plus via Lancashire LGR Data Working Group

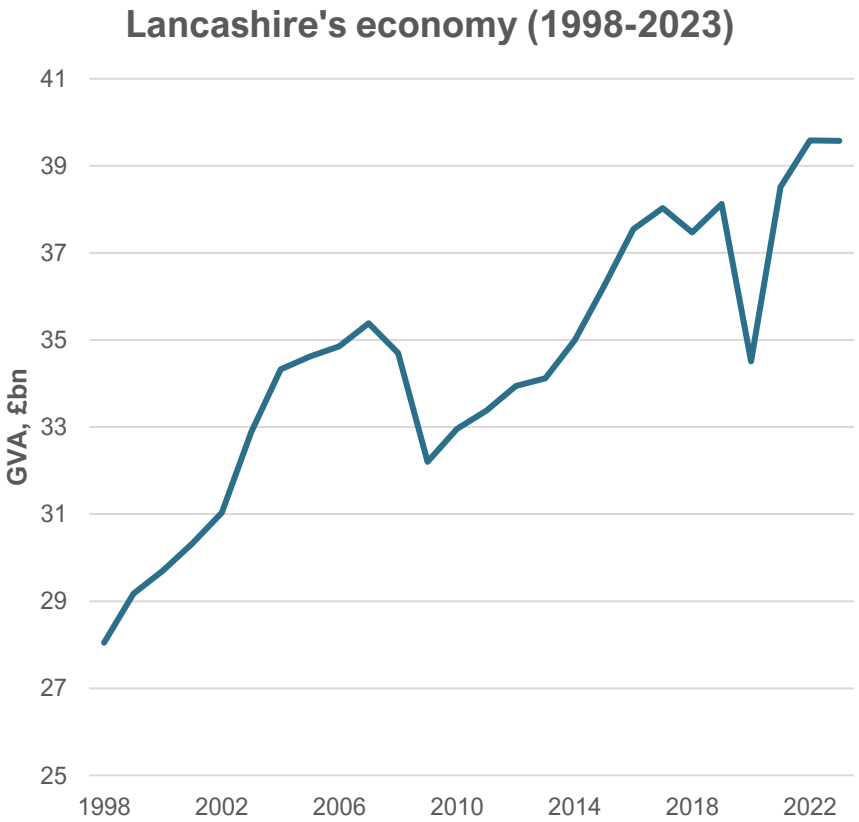
Lancashire's economy (inflation adjusted prices)

The economy in Lancashire has grown by 1.4% on average since 1998, below regional and national growth. The economy has recovered since the Pandemic but lags behind regional growth since 2019.

In 2023, the economy in Lancashire (12 districts and 2 unitaries) was estimated to be worth £43.1bn in current prices. The rest of the analysis presents GVA in real terms (in 2022 prices) to see how the economy has grown over the last 25 years, removing the effect of inflation.

Between 1998 and 2023, the economy in Lancashire increased in real terms by £11.5bn. There has been fairly consistent growth throughout this period, except for during the financial crisis and the Covid Pandemic, where all areas had been impacted – on the whole Lancashire was not significantly more impacted than regionally and nationally between 2019 and 2020. However, the economy was already beginning to slow pre-pandemic, with a reduction in GVA between 2017 and 2018. The economy has since recovered since the Pandemic and in 2023, the economy is around 4% larger than it was in 2019, growing by 0.9% a year since 2019. This is above 0.6% growth seen nationally but below 1.7% average for the North West, likely explained by strong growth seen in urban centres, particularly Manchester.

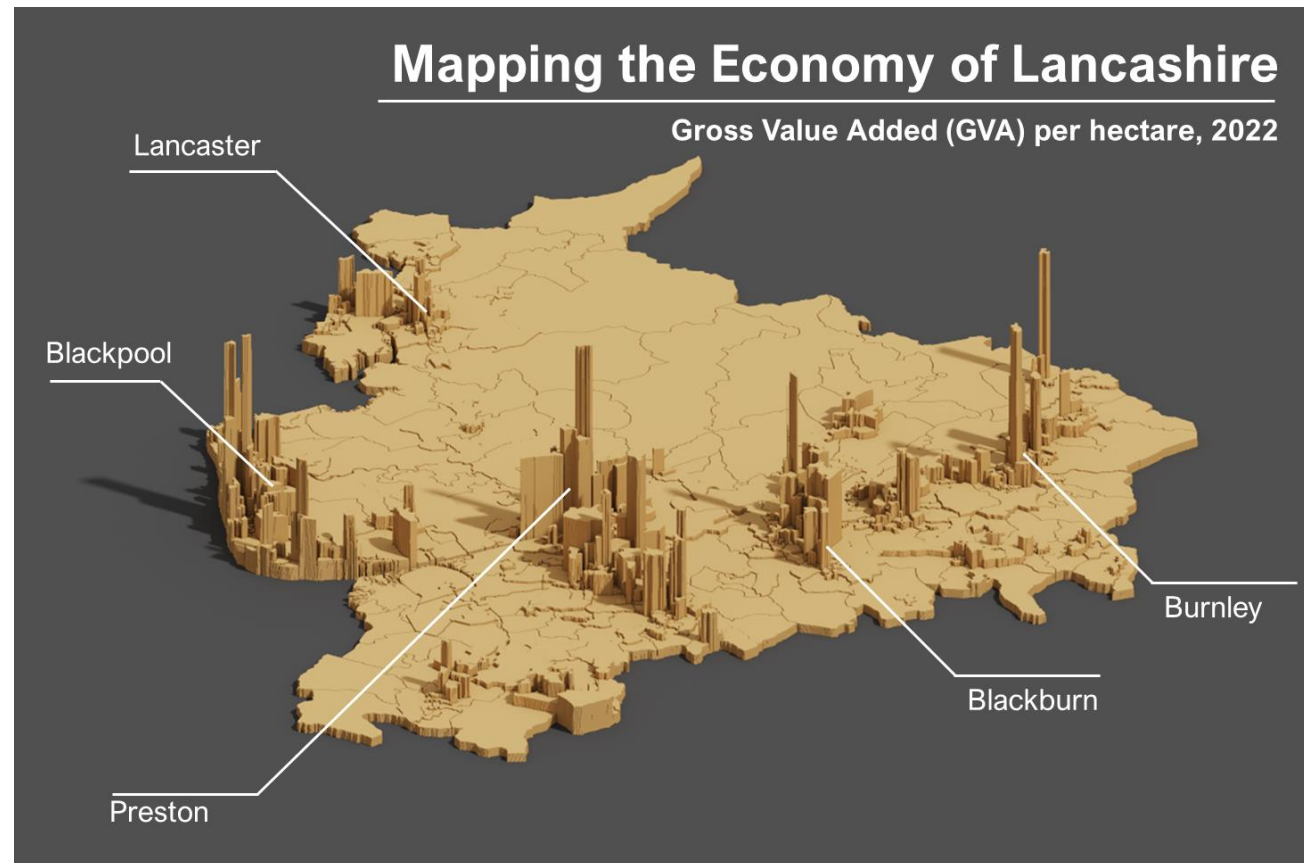
Between 1998 and 2023, Lancashire's economy has grown by an average of 1.4% – some areas have seen faster growth including Blackburn, West Lancashire, Pendle and South Ribble. Whereas some areas including Blackpool, Burnley, Fylde and Lancaster have seen slower long-run growth. Lancashire's average growth of 1.4% over the last 25 years is below 1.7% growth seen nationally and 1.9% regionally. Over the most recent year, growth has stalled with no change in the economy compared to growth of 0.5% nationally and 0.9% regionally.



Notes: GVA estimates use inflation adjusted (Chained Volume Measures) in 2022 money value so therefore are adjusted to remove the effect of inflation. The growth figures refer to compounded annual growth rate.
Source: Regional gross value added (balanced) by industry, ONS, 2025

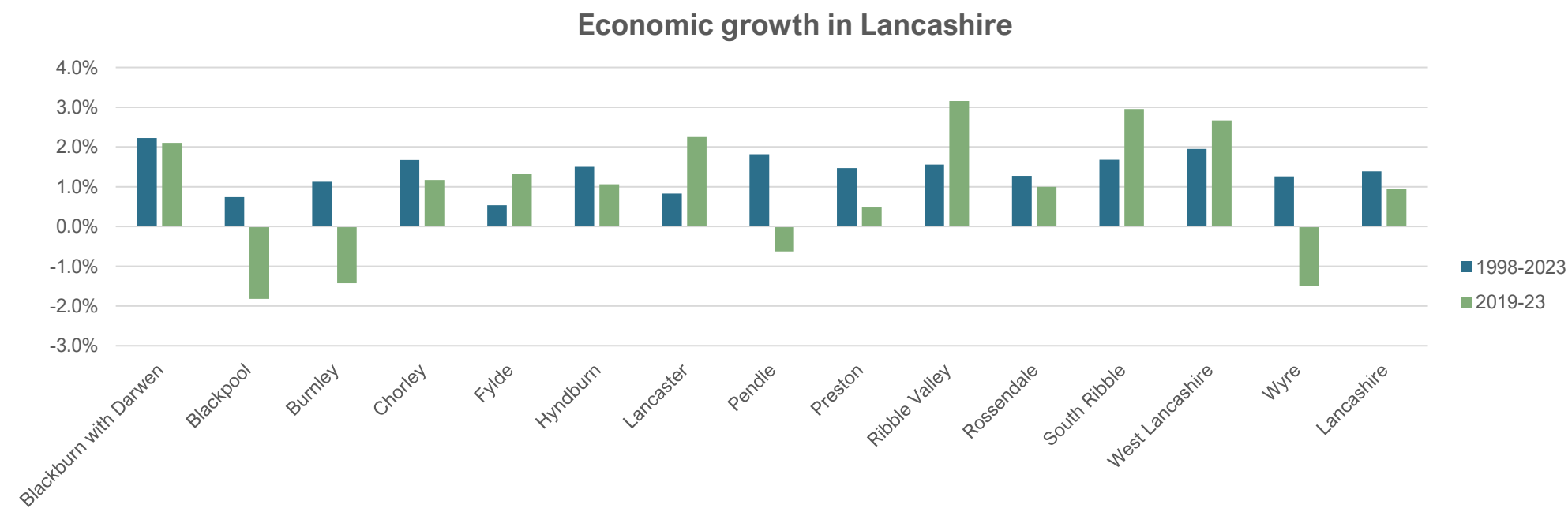
Lancashire's economy

- Centres of economic activity spread around Lancashire's shows its polycentric nature with five clusters of high value economic activity spread across the five large towns/cities of Lancaster, Blackpool, Preston, Blackburn, and Burnley and their surrounding areas:
 - Lancaster and Morecambe** - this includes Middleton and Heaton; and South of Lancaster covering Abbeystead and Lower Green Bank
 - Fylde Coast** covering Blackpool, Higher Ballam and Warton
 - Central Lancashire** covering Preston, South Ribble and Chorley - this includes Samlesbury, Farington, Sharoe Green, and Leyland
 - East Lancashire** this includes Blackburn and Darwen, Burnley, Clayton-le-Moors, Hapton, Simonstone, Barnoldswick and Altham
- Although not as big in scale as other areas mentioned, there is also significant economic activity based in South Lancashire covering West Lancashire (this includes Burscough, Crawford and New Lane).



Lancashire's economy growth – districts

Some areas have seen more growth than others – Blackburn, West Lancashire, Pendle, South Ribble, and Chorley have seen long-run growth above or close to the national average. Growth in Blackpool, Fylde, Burnley, and Lancaster has been at or below 1% since 1998, and the economies in Blackpool, Burnley, Pendle, and Wyre have yet to recover to pre-pandemic levels. Although long-run growth has been relatively slow in Fylde, there has been a strong recovery since the Pandemic, along with Ribble Valley, South Ribble, Blackburn, West Lancashire, Lancaster, Chorley, Hyndburn, and Rossendale.



Source: Regional gross value added (balanced) by industry: local authorities by ITL1 region, ONS, 2025

Lancashire’s economy – district breakdown

Central Lancashire a key contributor to overall economy but Lancashire remains a varied economy with multiple centres of economic activity.

The table to the right breaks down economic activity by local authority district in Lancashire. Preston remains the highest value economy in Lancashire, now worth over £5bn, followed by South Ribble and Blackburn. Combined Preston and South Ribble contribute around a quarter of GVA in Lancashire, highlighting the importance of Central Lancashire to the overall economy.

But there is no one single economy which is the dominant force, all areas contribute to the overall success of Lancashire’s economy – all 12 of Lancashire’s districts and 2 unitaries contribute at least £1bn in GVA, with half of areas contributing at least £3bn annually.

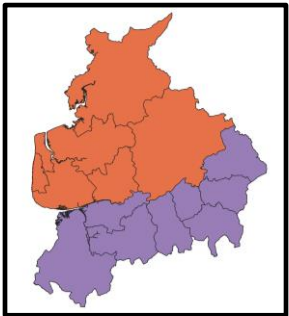
However, as has been explored there is variance in economic growth with Blackburn, West Lancashire, and Pendle all experiencing strong long-run growth; South Ribble, Chorley, Ribble Valley, Hyndburn, and Preston not too far behind but some areas have seen growth of 1% or under on average since 1998 (Blackpool, Fylde, Burnley, and Lancaster) – with the economies in Blackpool, Burnley, Pendle, and Wyre yet to recover to pre-pandemic levels.

GVA by local authority district (1998 and 2023), £bn

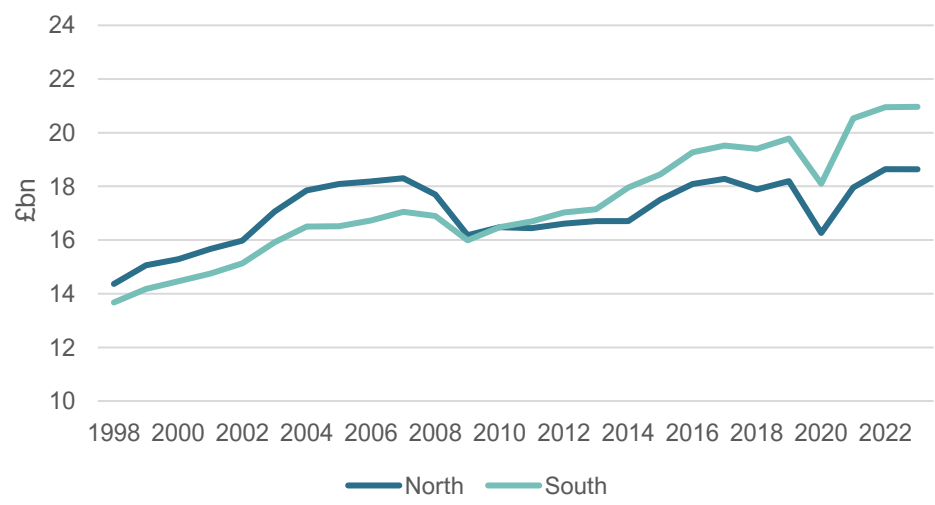
Area	1998	2023	1998-2023
Preston	3.59	5.17	1.5%
South Ribble	2.90	4.40	1.7%
Blackburn with Darwen	2.21	3.83	2.2%
Lancaster	2.79	3.43	0.8%
West Lancashire	2.07	3.35	1.9%
Fylde	2.69	3.07	0.5%
Blackpool	2.53	3.04	0.7%
Chorley	1.70	2.58	1.7%
Burnley	1.65	2.18	1.1%
Ribble Valley	1.39	2.04	1.6%
Wyre	1.38	1.88	1.3%
Pendle	1.17	1.83	1.8%
Hyndburn	1.12	1.62	1.5%
Rossendale	0.86	1.18	1.3%

Notes: GVA estimates use inflation adjusted (Chained Volume Measures) in 2022 money value so therefore are adjusted to remove the effect of inflation. The growth figures refer to compounded annual growth rate. Those in green are above national growth, those in yellow are within 0.25 percentage points of average national growth and those in red are 0.25 percentage points below average UK growth
Source: Regional gross value added (balanced) by industry: local authorities by ITL1 region, ONS, 2025

Lancashire's economy – 2UA



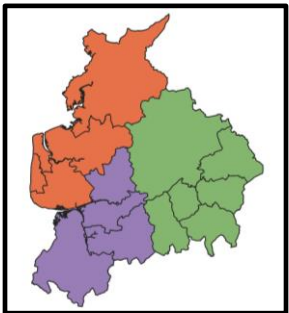
GVA 2UA (1998-2023)



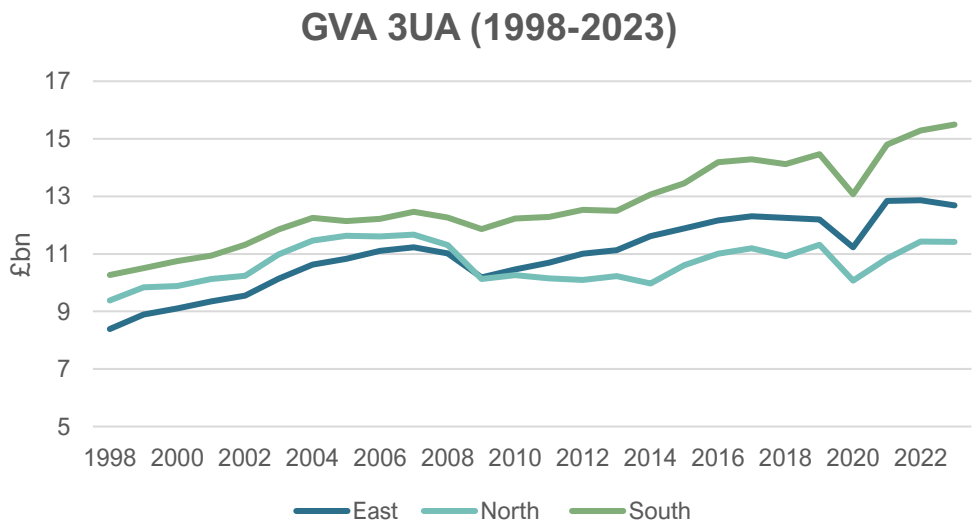
- The South has become the biggest economy of the two authorities from around 2010 onwards, first closing the gap and continuing along a faster growth trajectory than the North.
- South economy has grown by around £7bn over this period, growing by 1.7% annually, roughly in line with national and regional growth, closing and passing a £1bn gap to the North in 1998 to being £2.4bn larger in 2023.
- North's economy has grown by around £4.3bn between 1998 and 2023, average annual growth of 1.0%.
- South makes up 53% and North 47% of total economy.
- South has seen growth of 1.5% a year on average between 2019 and 2023, well above 0.6% growth in North Lancashire.

Source: Regional gross value added (balanced) by industry: local authorities by ITL1 region, ONS, 2025

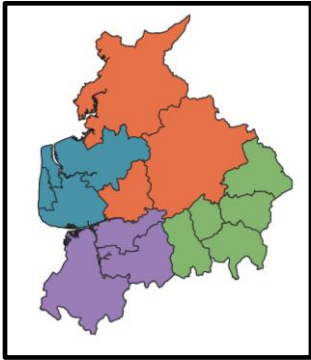
Lancashire's economy – 3UA



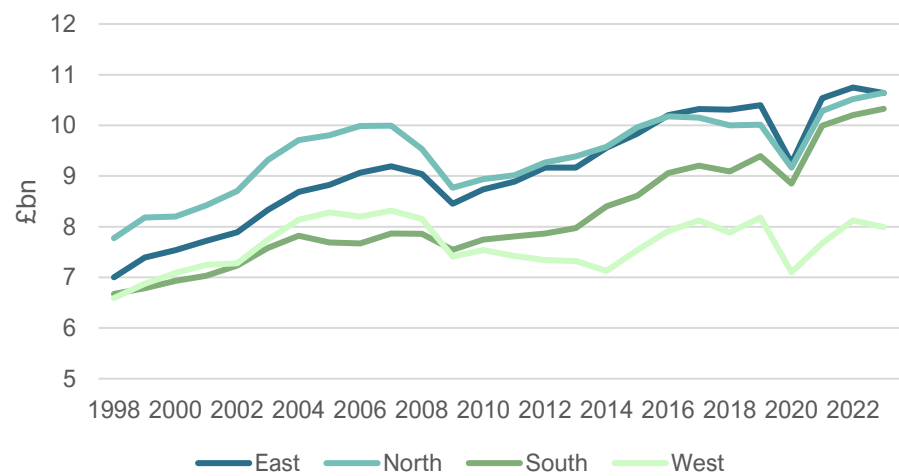
- Wide variation between the proposed three authorities. South remains the biggest economy and has seen strong growth of 1.7% a year on average since 1998, roughly in line with national and regional growth, growing by over £5bn to £15.5bn.
- East has also seen strong long-run growth of 1.7% since 1998 of over £4bn to £12.7bn.
- North has seen slowest long-run growth of 0.8% a year, growing by £2bn to £11.4bn. East has moved to become the second biggest economy over this period.
- Over the most recent year of data between 2022 and 2023, East and North's economies have seen a slowdown, particularly in the East with a decline of -1.4% whereas South has continued to see growth of 1.3%.



Lancashire's economy – 4UA



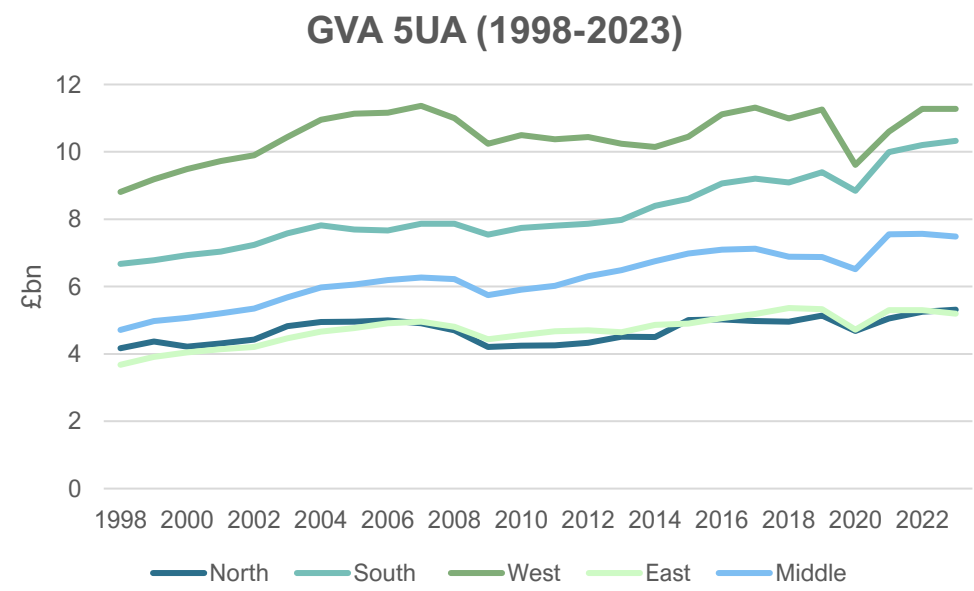
GVA 4UA (1998-2023)



- North, East, and South UAs, all contribute around £10.5bn to the Lancashire economy – West is a lower contributor at £8bn.
- South and East have seen strong long-run growth of between 1.7%-1.8% over the last 25 years. Both proposed authorities have seen a recovery since the Pandemic, particularly in the South where growth has averaged 2.4% a year between 2019 and 2023, and 0.6% a year in East Lancashire.
 - Over the last year growth has continued in the South of 1.2% whereas in the East the economy has shrunk by -1.0%.
- North has seen more modest growth of 1.3% a year between 1998 and 2023 to £10.6bn. There has been a strong recovery since the Pandemic of 1.5% a year between 2019 and 2023, and over the last year growth has continued by 1.2% between 2022 and 2023.
- West UA's economy has struggled to generate the same level of growth as the other proposed authorities, continuing to slowdown following the financial crisis and being impacted more significantly during the Pandemic.
 - As a result, long-run growth has been slower averaging 0.8% a year between 1998 and 2023. The economy has yet to recover pre-pandemic levels and shrunk by 1.7% last year.

Source: Regional gross value added (balanced) by industry: local authorities by ITL1 region, ONS, 2025

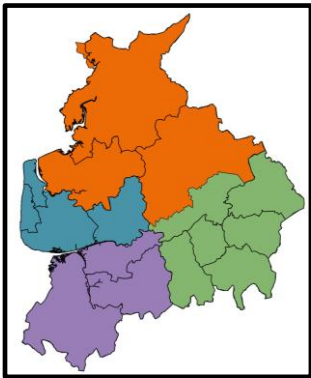
Lancashire's economy – 5UA



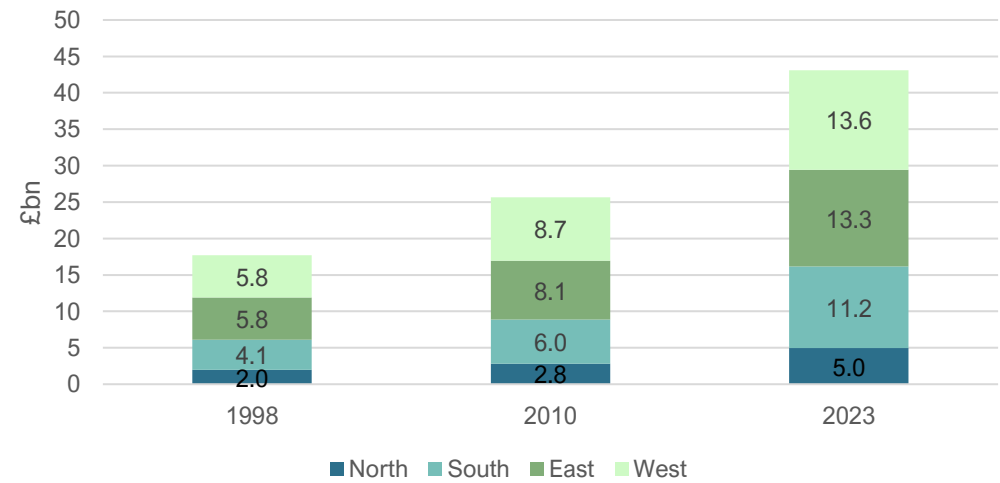
- West and South are largest contributors to the overall economy, each contributing at least £10bn – West has the biggest economy worth £11.3bn. North and East make the smallest contributions at just over £5bn each.
- Middle and South have seen the fastest long-run growth between 1.8%-1.9% a year between 1998 and 2023. Both have also seen strong recoveries post Pandemic, averaging growth of over 2% between 2019 and 2023.
- Despite being the largest economy, the West has experienced more modest long-run growth of 1.0% a year between 1998 and 2023, and only just returned to pre-pandemic levels.
- East has seen long-run growth of 1.4% between 1998 and 2023. The economy has yet to recover to pre-pandemic levels and contracted by -2% last year.
- North has seen modest long-run growth of 1.0%, although has experienced a strong recovery since the Pandemic, with growth averaging 0.8% between 2019 and 2023, and growth of 1.2% over the last year.

Source: Regional gross value added (balanced) by industry: local authorities by ITL1 region, ONS, 2025

Lancashire's economy – 4UA B



GVA 4UA B (1998, 2010 and 2023)



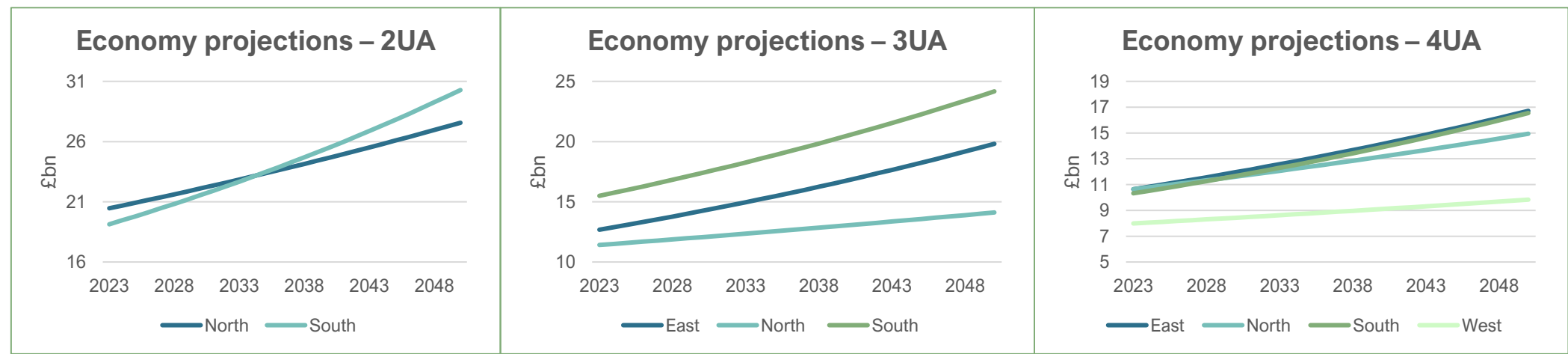
- East and West have consistently been the biggest economies in this option, combined making up almost two thirds of the total Lancashire economy.
 - Using current prices, the economies of East and West Lancashire have seen average growth of 3.4%-3.5% a year between 1998-2023.
- South Lancashire has seen the fastest growth across UAs of 4.1% a year over the last 25 years, increasing its contribution to the overall Lancashire economy from around 23% to 26%.
- North Lancashire has the smallest economy of the 4UAs. The economy in the North is over £8.5bn smaller than the largest economy of West Lancashire.
 - North Lancashire has seen average growth of 3.8% a year over the last 25 years.

Notes: GVA estimates for other options use Chained Volume Measures in 2022 money value so therefore are adjusted to remove the effect of inflation. This option uses GVA by small area estimates which are only available using current prices and therefore does not adjust for the effects of inflation, so figures are not directly comparable to other options.
Source: UK small area gross value added (GVA) estimates, ONS, 2025

Economy projections – 2, 3, 4 UA options

Assuming long-run economic growth trends between 1998 and 2023 continued, Lancashire’s economy would be worth £57.4bn in 2050. The below charts show how this is broken down by the different options:

- **2UA:** South economy projected to grow by £12.3bn from £21bn to £33.3bn, increasing the gap to the North’s economy to almost £9bn. North’s economy projected to grow by around £6bn from £18.6bn to £24.7bn.
- **3UA:** South and East see similar growth, with South projected to grow by around £9bn from £15.5bn to £24.2bn, and East by £7bn from £12.7bn to £19.8bn. Growth is far more modest in North by around £2.5bn from £11.4bn to £14.1bn, with the gap growing to South and East’s economies.
- **4UA:** East and North see a very similar trajectory from ~£10.5bn to ~£16.5bn. Growth projected to be slower in North from £10.6bn to £14.9bn, with gap growing to other unitary authorities. West remains the smallest economy at growing by £1.8bn to £9.8bn.

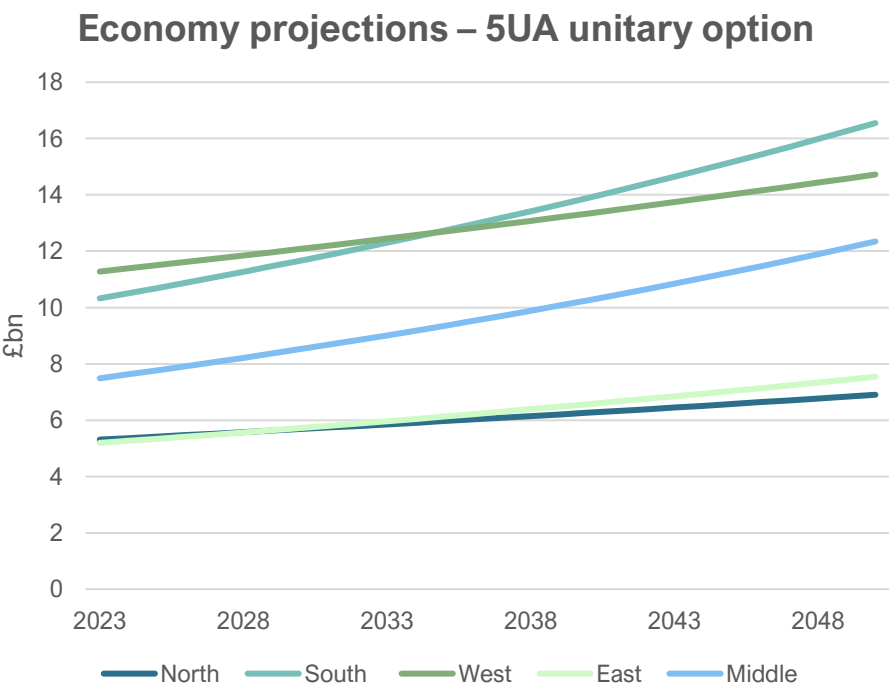


Source: Metro Dynamics analysis of Regional gross value added (balanced) by industry: local authorities by ITL 1 region, ONS, 2025

Economy projections – 5UA

Assuming long-run economic growth trends between 1998 and 2023 continued, Lancashire’s economy would be worth £57.4bn in 2050. The below show how this is broken down by the different options for option 5:

- South projected to become the biggest economy growing by £6bn from £10.3bn in 2023 to £16.5bn in 2050.
- Middle’s economy is projected to rise by around £5bn from £7.5bn to £12.3bn, closing the gap to the current biggest economy of the West which is expected to grow by £3.5bn from £11.3bn in 2023 to £14.7bn in 2050.
- East is projected to see faster growth than the North, but both are projected to remain smaller than the current size of the Middle’s economy.
- North and East combined are projected to be smaller than the South’s economy.

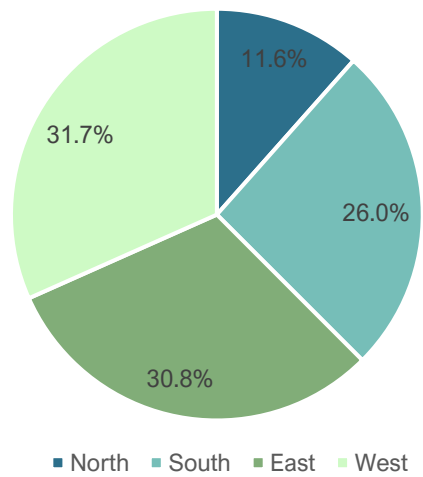


Economy projections – 4UA B

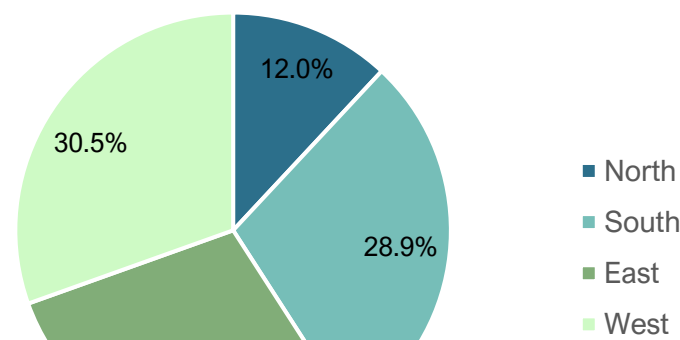
GVA data used to calculate total economies for the 4UA Blackpool options use GVA by small area data which are only available using current prices, unlike the other options where data are adjusted for the effects of inflation. Therefore, rather than reporting the size of total economies we have shown how the contribution to the total economy for each of the UAs is projected to change:

- If South is projected to see fastest growth its contribution will increase to be comparable with West and South, all making up over a quarter of the total economy – combined these 3UAs make up almost 90% of the total economy.
- North projected to contribute 12% of the total economy.

Proportion of economy 4UA B (2023)



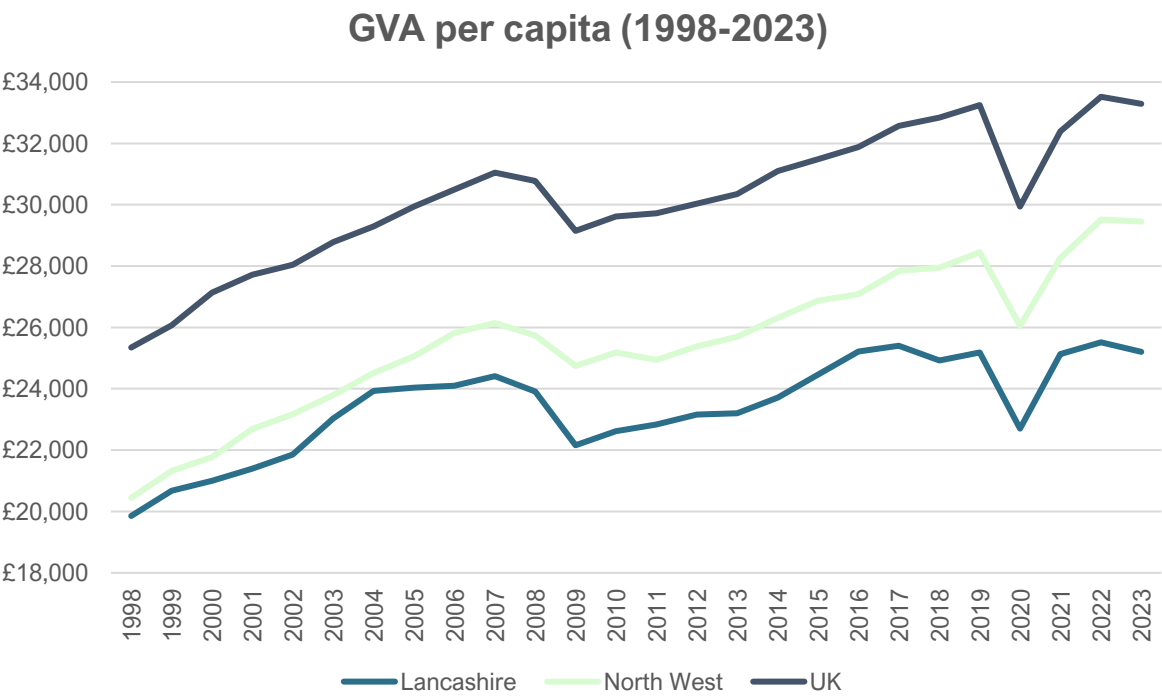
Proportion of economy 4UA B (2050)



Notes: GVA estimates for other options use Chained Volume Measures in 2022 money value so therefore are adjusted to remove the effect of inflation. This option uses GVA by small area estimates which are only available using current prices and therefore does not adjust for the effects of inflation, so figures are not directly comparable to other options.
Source: Metro Dynamics analysis of UK small area gross value added (GVA) estimates, ONS, 2025

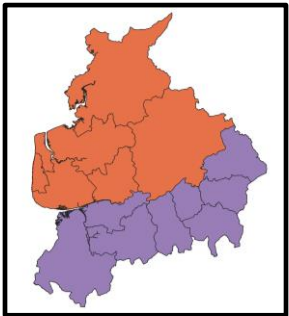
GVA per capita

Gross Value Added (GVA) per capita measures the average economic output produced per person, calculated by dividing total GVA by the population. Higher GVA per capita generally suggests that the workforce is producing more value, either through higher efficiency, better skills, or more advanced industries. From 1998 to 2023, Lancashire's GVA per capita consistently trailed behind both the North West and UK averages, reflecting relatively lower economic output per person. GVA per capita grew by 1.0% on average since 1998, roughly in line with 1.1% growth nationally but below 1.5% regionally. The gap to the regional average has increased from £600 in 1998 to over £4,000 in 2023.

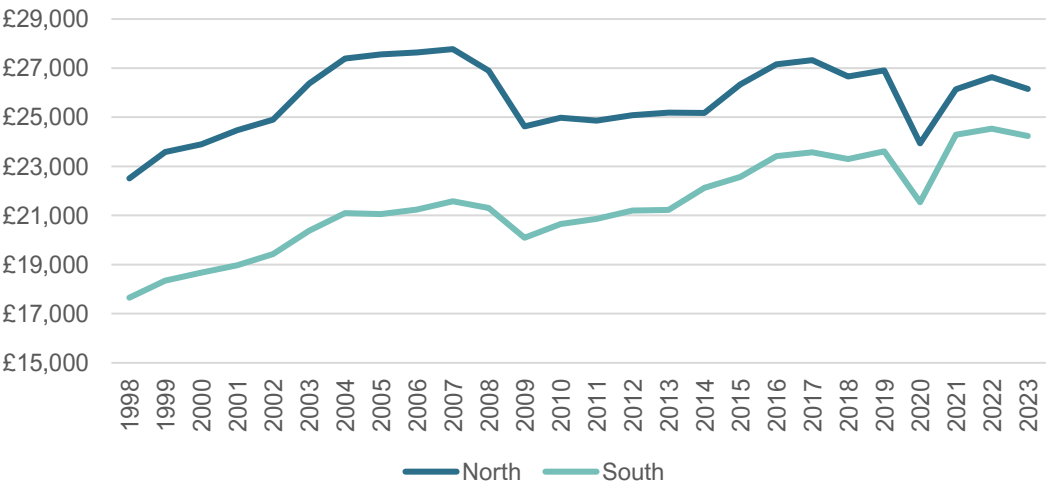


- In 2023, several Lancashire districts recorded a higher GVA per capita than the North West average of £29,455. These included South Ribble, Fylde, Preston, Ribble Valley, and West Lancashire, indicating relatively stronger economic output per person in these areas.
- Conversely, districts such as Blackburn with Darwen, Blackpool, Burnley, Chorley, Hyndburn, Lancaster, Pendle, Rossendale, and Wyre had lower GVA per capita, highlighting regions where productivity lag behind the broader North West benchmark

GVA per capita – 2UA

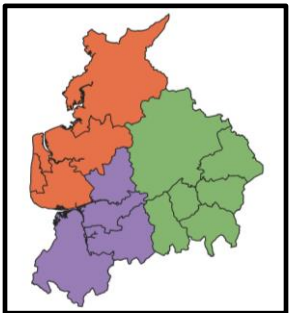


GVA per capita 2UA (1998-2023)



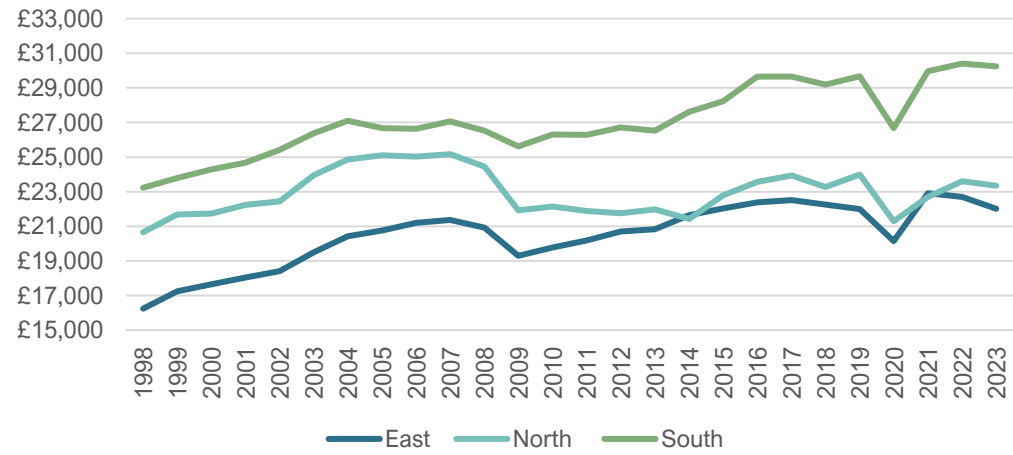
- North has consistently had higher GVA per capita than the South but the gap in GVA per capita has narrowed particularly from around 2008, although the North remains more productive.
- GVA per capita in the North had been consistently growing between 1998 and 2007 where GVA per capita peaked at £27,775. GVA per capita had stalled in the years following until starting to pick up again around 2014 but had stalled again in the run up to 2019. It has since picked up but remains below levels seen in 2007. Between 1998-2023, growth averaged 0.6%, below 1.1% nationally and 1.5% regionally.
- GVA per capita has shown much stronger growth in the South, closing the gap to the North from over £6,000 in 2007 to £1,900 in 2023. Contrasting to the North, growth picked up after the financial crisis, although similarly slowing in the build up to 2019, but has since picked up more strongly than the North. Growth has averaged 1.3% over the last 25 years, above national growth rates.

GVA per capita – 3UA



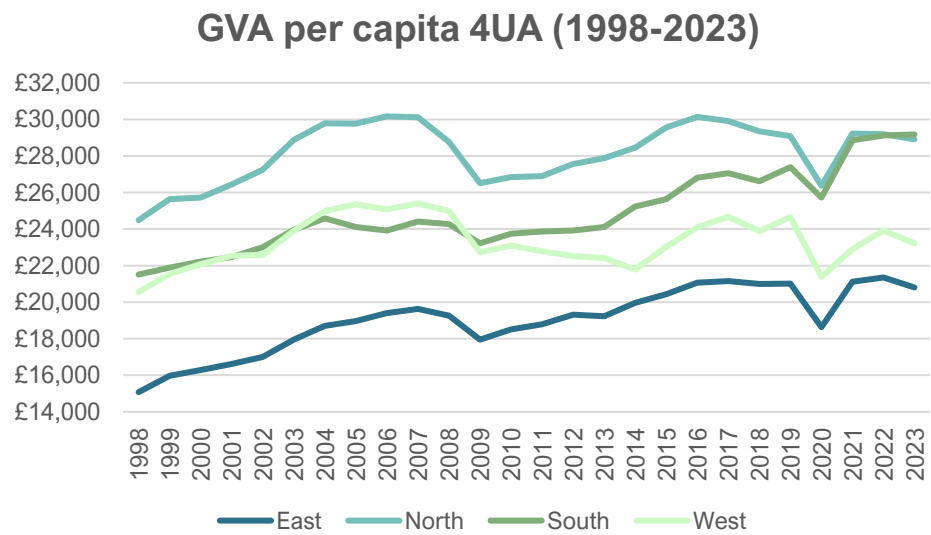
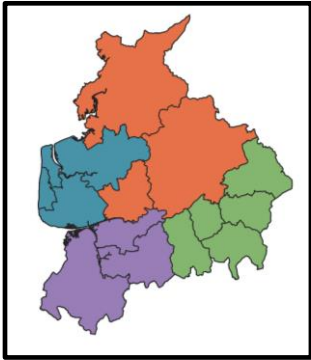
- From 1998 to 2023, the South consistently recorded the highest GVA per capita across all three proposed authorities, starting at £23,231 in 1998 and rising to £30,251 in 2023, reflecting sustained economic strength and productivity leadership throughout the period. South has seen average growth of 1.1% a year between 1998 and 2023.
- Both the North and East trailed behind, with the North maintaining a middle position and the East consistently showing the lowest GVA per capita, ending in 2023 at £23,342 and £22,018 respectively, highlighting persistent disparities in economic output per person.
 - East has seen the fastest average growth of 1.2% a year between 1998 and 2023.
 - North more modest annual growth of 0.5% a year.

GVA per capita 3UA (1998-2023)



Source: Regional gross value added (balanced) by industry: local authorities by ITL1 region, ONS, 2025; Population estimates – local authority based by single year of age, ONS, 2025

GVA per capita – 4UA

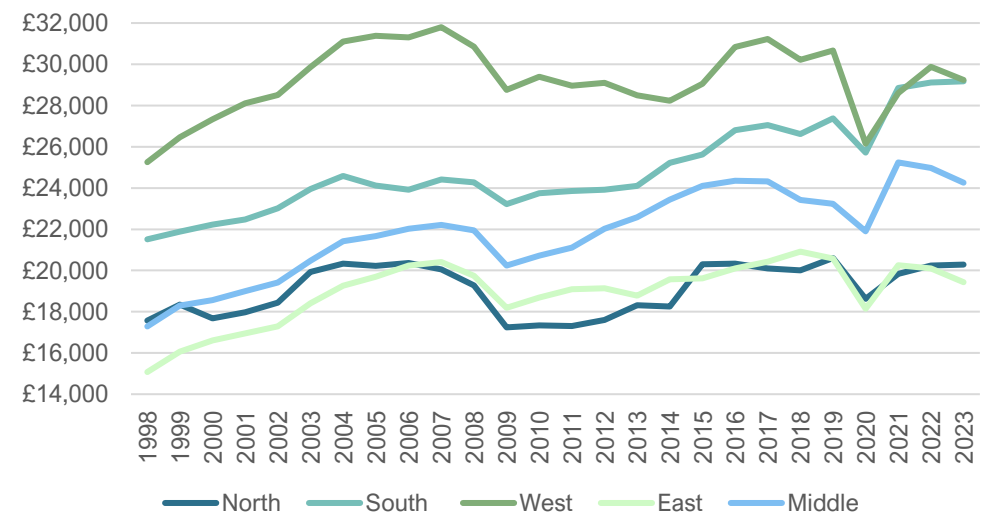


- The North led in GVA per capita throughout most the period, starting at £24,486 in 1998. The region showed strong resilience and steady growth, especially in the early 2000s, peaking at £30,163 in 2006. During the 2008–2009 financial crisis there was a significant dip and although there was growth post the financial crisis, GVA per capita started to fall from around 2015 until 2020, with GVA per capita at £29,175 in 2023. Between 1998 and 2023, the North saw average growth of 0.7% a year between 1998 and 2023.
- The South now has the highest GVA per capita, beginning at £21,512 in 1998 and rising to £29,175 by 2023. The South showed notable acceleration post-2015, narrowing and then overtaking productivity in the North. South has seen growth of 1.2% a year between 1998 and 2023.
- The West maintained a middle position for most of the timeline, starting at £20,556 in 1998 and reaching £23,216 in 2023. It experienced moderate growth but was more volatile, particularly around the 2008–2012 period, where GVA per capita dipped and stagnated. West has seen the lowest average growth of 0.5% a year between 1998 and 2023.
- The East consistently had the lowest GVA per capita, beginning at £15,077 in 1998 and ending at £20,810 in 2023. East has seen the fastest average growth of 1.3% a year between 1998 and 2023.

GVA per capita – 5UA



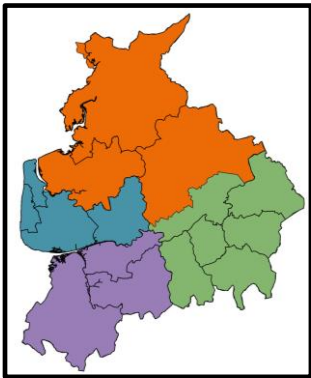
GVA per capita 5UA (1998-2023)



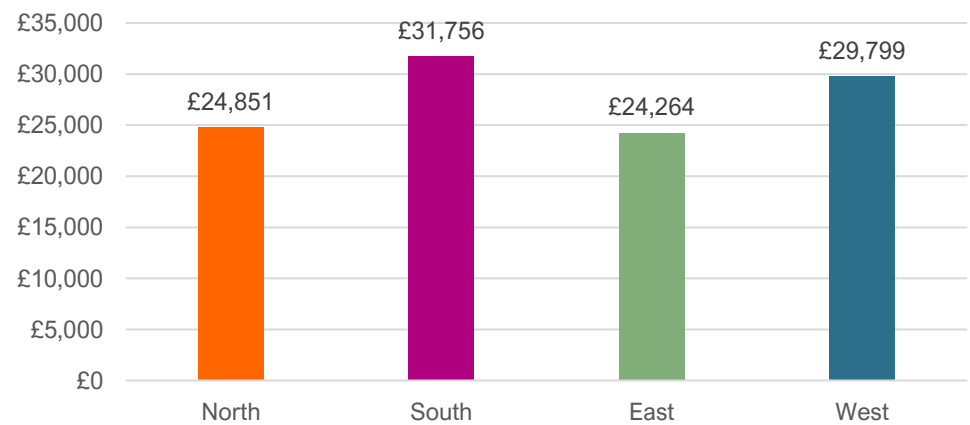
- With the highest starting value (£25,253) and a peak of £31,800 in 2007, the West maintained a leading position earlier in the period. However, its trajectory included significant fluctuations, particularly around the 2008–2012 period, ending at £29,243 in 2023. Growth between 1998 and 2023 averaged 0.6% a year, joint lowest along with the North.
- The North unitary option had a GVA per capita of £17,575 in 1998 rising to £20,283 in 2023, joint lowest annual growth of 0.6% a year.
- The South began at £21,512 and climbed to £29,175 by 2023, average growth of 1.2% a year.
- The East consistently lagged behind, starting at £15,074 and ending at £19,434. Despite a peak in 2018 (£20,914), it remained the lowest-performing region throughout, with a volatile path and limited overall growth. Between 1998 and 2023, the East averaged 1.0% annual growth.
- Starting at £17,287 and rising to £24,256, the Middle region showed steady improvement. It peaked in 2021 (£25,240) and, while experiencing some volatility, maintained a consistent upward trend over the period. Middle has seen the highest average annual growth of 1.4% a year between 1998 and 2023.

Source: Regional gross value added (balanced) by industry: local authorities by ITL1 region, ONS, 2025; Population estimates – local authority based by single year of age, ONS, 2025

GVA per capita – 4UA B



GVA per capita 4UA B (2023)



- South Lancashire is the most productive of the 4UAs with the highest GVA per capita, overtaking West Lancashire from two decades prior. South Lancashire has seen an average rise of 3.3% a year in GVA per capita between 2002-23, the highest growth across the 4UAs. South Lancashire contributes 26% of total economy in 2022, above its 23% of population.
- West Lancashire has seen the slower growth of 2.9% a year but along with South Lancashire, there remains a significant gap in GVA per capita levels of at least £5,000 to East and North Lancashire. West Lancashire contributes 32% of total economy in 2022, above its 29% of population.
- Despite being the one of the largest economies East Lancashire is the least productive of the UAs, with average growth of 3.0% a year in GVA per capita. East Lancashire contributes 31% of the total economy, below its 35% share of population.
- North Lancashire is the second productive UA, overtaking East UA productivity with average growth of 3.1% a year. North Lancashire contributes 12% of the economy, slightly below its 13% population share.

Notes: GVA estimates for other options use Chained Volume Measures in 2022 money value so therefore are adjusted to remove the effect of inflation. This option uses GVA by small area estimates which are only available using current prices and therefore does not adjust for the effects of inflation, so figures are not directly comparable to other options. We have calculated 2023 estimates by projecting latest ward level population estimates using historical population growth trends.

Source: ONS UK small area gross value added (GVA) estimates, ONS, 2024; Ward-level population estimates, ONS, 2024

Household deprivation – % of households not deprived

This map shows the proportion of households not deprived in any of the four dimensions of education, employment, health and housing by MSOA level across Lancashire.

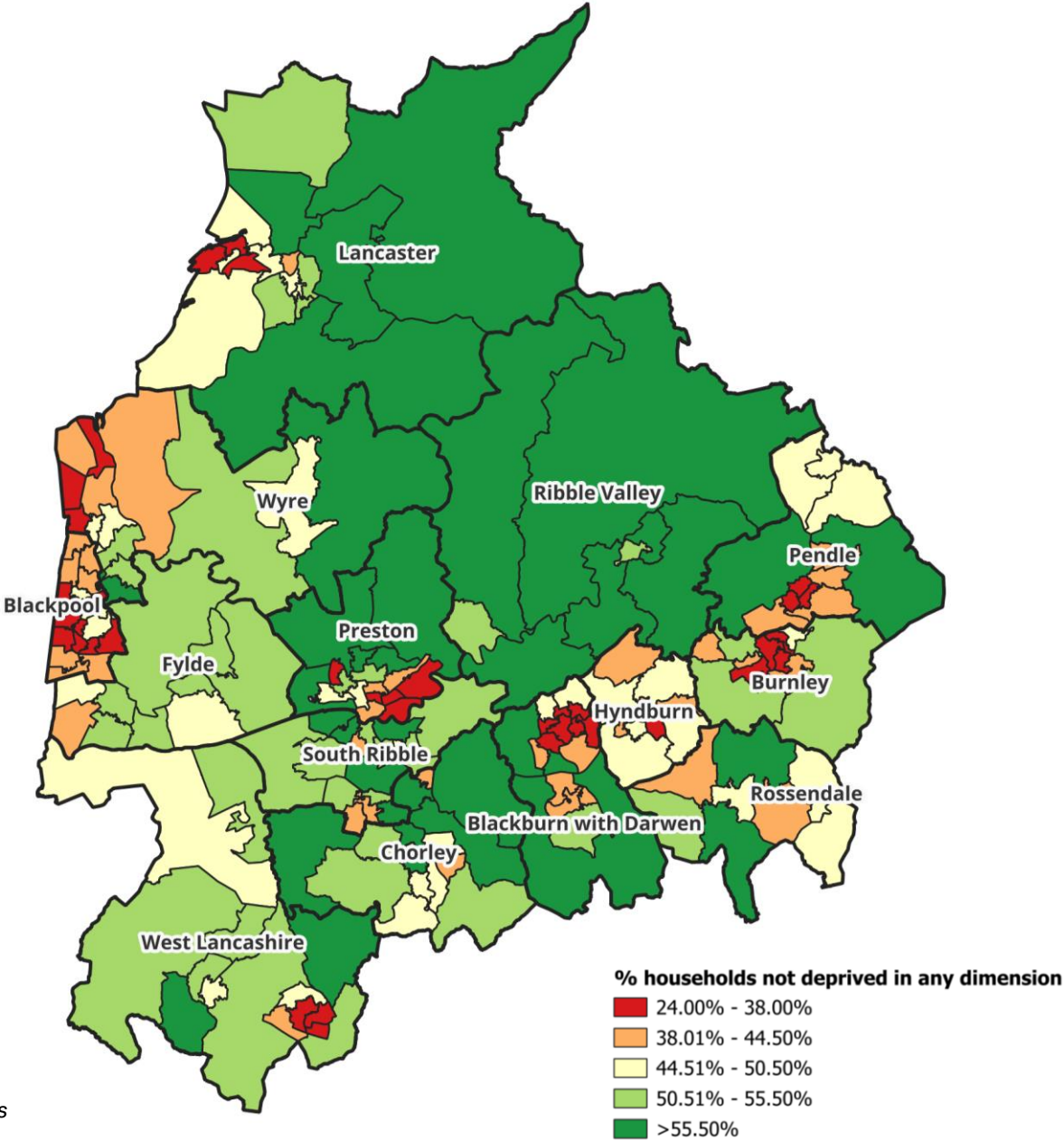
Much of the North East and South of Lancashire tends to have low deprivation levels as compared to the national average, where 48.3% of households are not deprived in any dimension, and 46.7% of households across the North West region.

However, there are concentrations where only between a quarter and third of households are not deprived in any of the four dimensions including in Blackpool, Preston, Burnley, Blackburn, Skelmersdale, and Morecambe.

Notes:

- A household is classified as deprived in the education dimension if no one has at least level 2 education and no one aged 16 to 18 years is a full-time student
- A household is classified as deprived in the employment dimension if any member, not a full-time student, is either unemployed or economically inactive due to long-term sickness or disability.
- A household is classified as deprived in the health dimension if any person in the household has general health that is bad or very bad or is identified as disabled
- A household is classified as deprived in the housing dimension if the household's accommodation is either overcrowded, in a shared dwelling, or has no central heating.

Source: ONS Census 2021

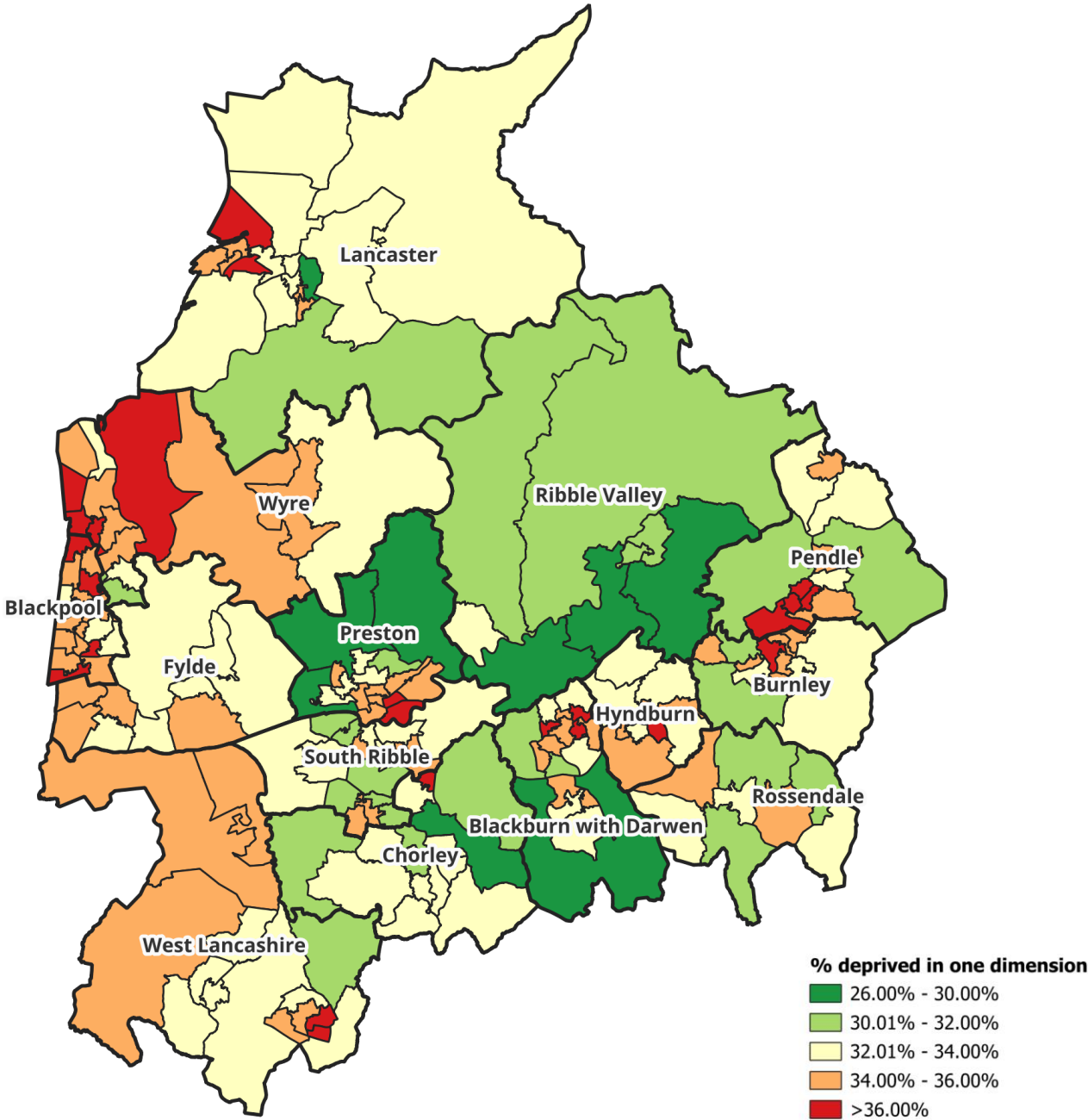


Household deprivation - % of households deprived in one dimension

This map shows the proportion of households deprived in at least one of the four dimensions of education, employment, health and housing by MSOA level.

This map shows that much of the region displays some challenge although many areas in Ribble Valley display relatively less challenge, as well as areas in Blackburn (Belmont and Edgworth), Preston (Elston, Grimsargh and Haighton Green) and Chorley as compared to ~33% of households nationally and regionally who are deprived in one dimension.

However, there are concentrations where households are more likely to be deprived in at least one dimension including the previously mentioned urban centres of Blackburn, Preston and Burnley, and coastal communities in Blackpool and Morecambe.

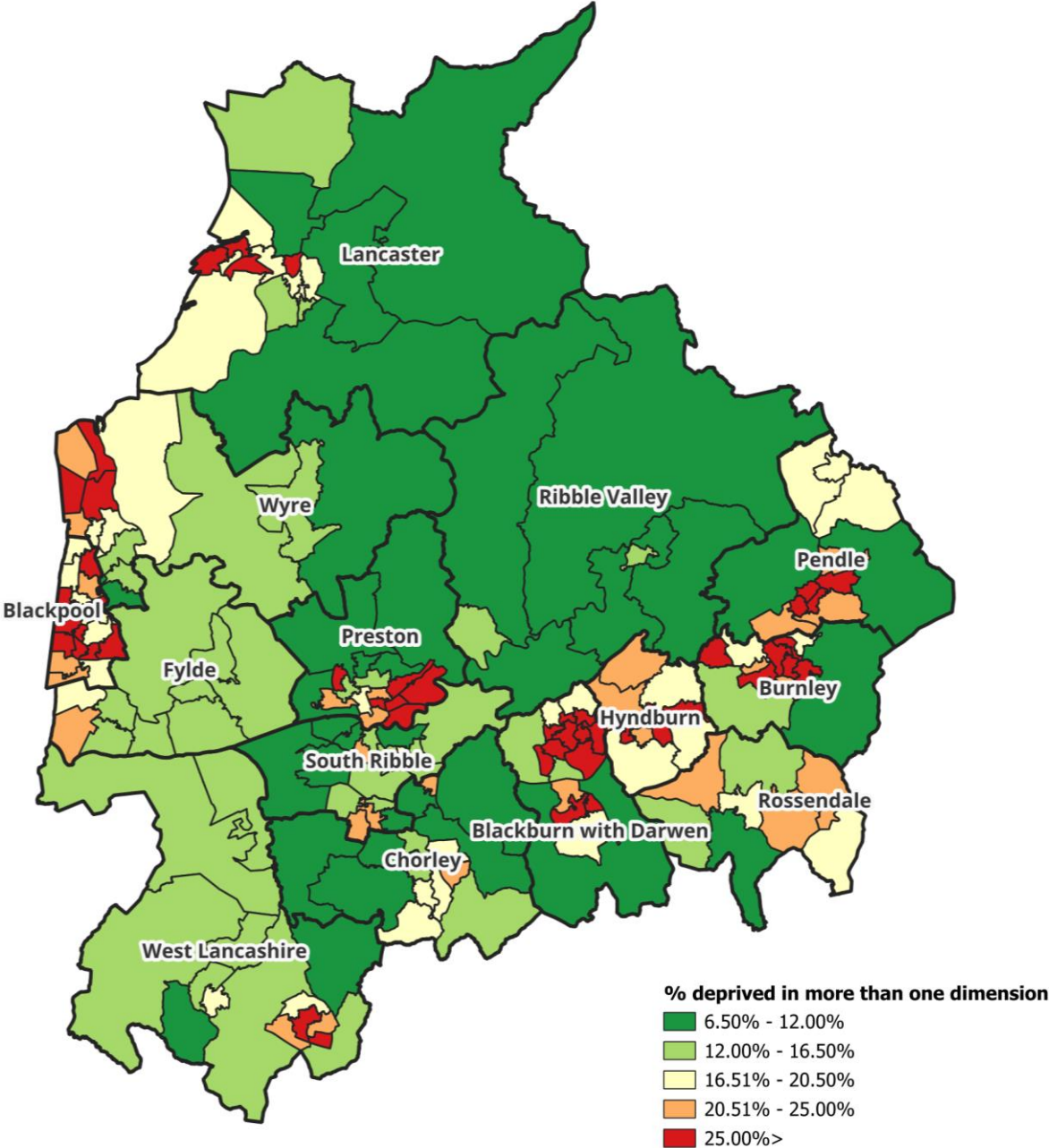


Household deprivation – % of households deprived in more than one dimension

This map shows the proportion of households deprived in more than one of the four dimensions of education, employment, health, and housing by MSOA level.

Much of the North East and South of the region tends to have low deprivation levels as compared to the national and regional average of between 14-15% of households deprived in more than one of the dimensions.

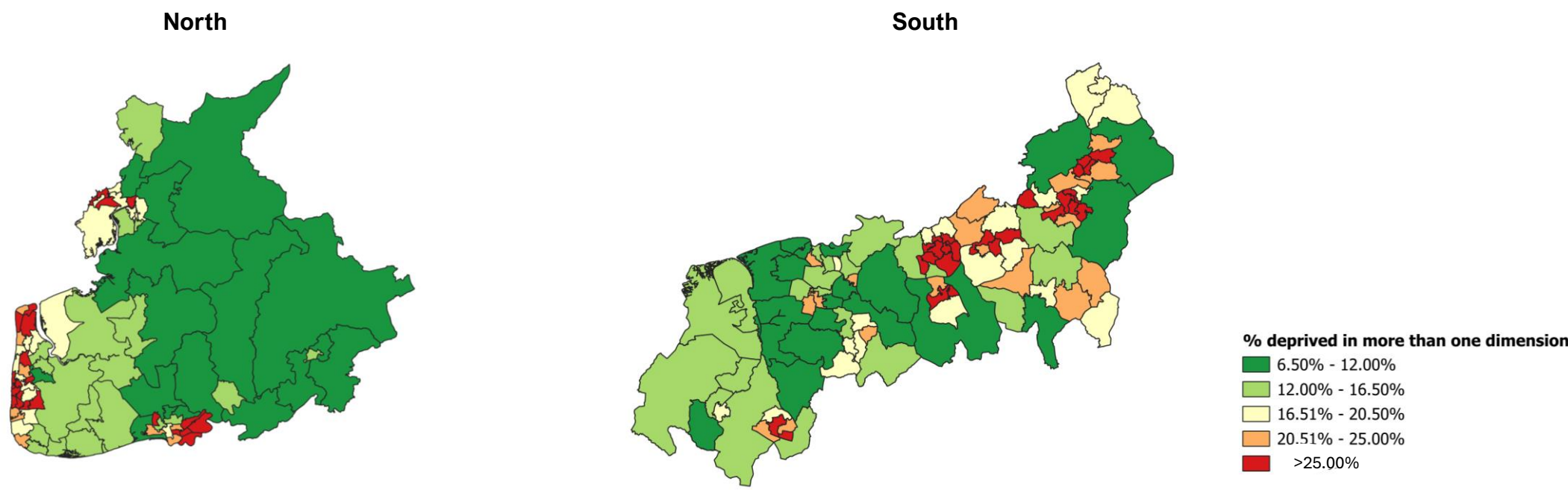
However, deprivation appears to be concentrated in some of Lancashire’s urban centres including Blackburn, Preston, Pendle, Burnley, and Hyndburn, and coastal communities in Blackpool where much of the district area contains households deprived in more than one dimensions, and Morecambe.



Household deprivation – 2UA

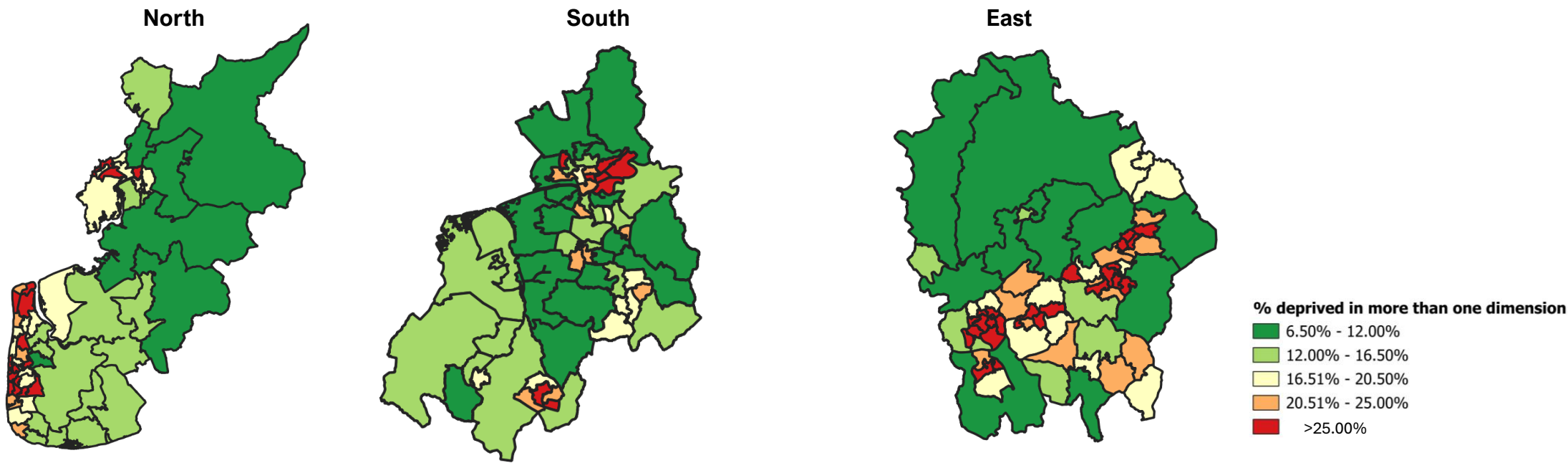
Deprivation levels are slightly higher in the South than the North – in the North, 19.4% of households are deprived in one or more dimension, with 46.7% not deprived in any dimension. Whereas in the South, a fifth of households (20.1%) are deprived in more than one dimension, and 46.2% of households are not deprived in any dimension but there is not much difference between the 2UAs.

In the North, much of the authority has a relatively low level of deprivation covering much of Lancaster, Ribble Valley and East Preston (Elston, Grimsargh and Houghton Green), with deprivation concentrated in Blackpool, Preston including Ribbleton, and Morecambe. There are also areas of low deprivation in the South authority covering Chorley, South Ribble, and South Blackburn, with deprivation concentrated in Blackburn, Hyndburn, Pendle, and Burnley.



Household deprivation – 3UA

The East is the most deprived of the three unitaries, with 21.8% of households deprived in more than one dimension, and only 44.5% of households not deprived in any dimension – much of the North of the East UA covering Ribble Valley is relatively less deprived but there are concentrations of high deprivation in Blackburn, Burnley, Pendle, and Hyndburn. 20.3% of households in the North is deprived in more than one dimension much of this concentrated in Blackpool. The South has the lowest levels of household deprivation with only 16.8% deprived in more than one dimension and half not deprived in any dimension – the only area below the national average of 18.2% of households deprived in more than one dimension.

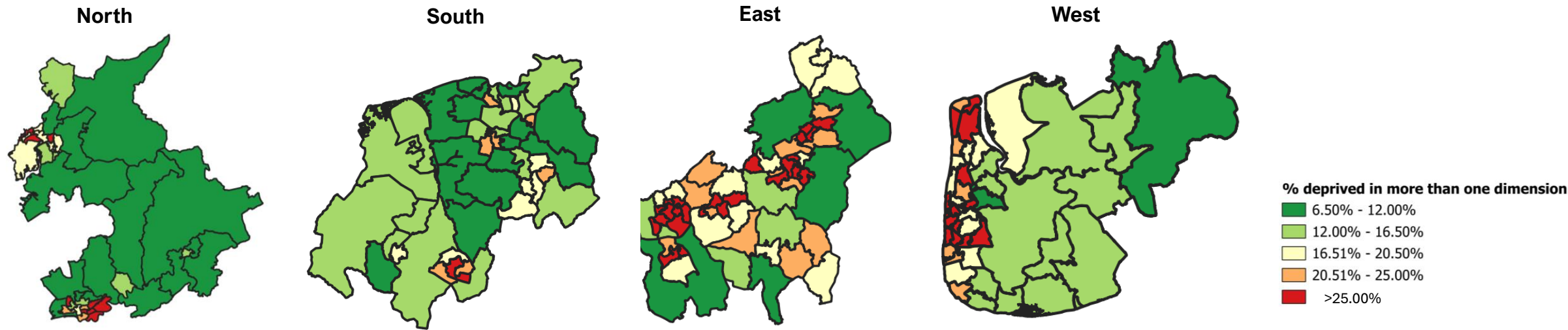


Source: ONS Census 2021

Household deprivation – 4UA

South has the lowest proportion of households deprived in more than one dimension at 15.6%, and 51% not deprived in any dimension – much of the deprivation is concentrated in Skelmersdale. Similarly North has a lower proportion of households deprived in more than one dimension of 17.3%, and almost half not deprived in any dimension. South has a lower proportion of households deprived in more than one dimension compared to the national average.

Deprivation is highest in the East with 23.3% of households deprived in more than one dimension, concentrated in Blackburn, Burnley, Hyndburn, and Pendle, and only 42.6% of households not deprived in any dimension. West also has a high level of deprivation which is concentrated in Blackpool – 21.4% of households are deprived in more than one dimension, and 43.9% not deprived in any dimension. Both the East and West have higher levels of deprivation compared to the regional average where around 20% of households are deprived in more than one dimension.

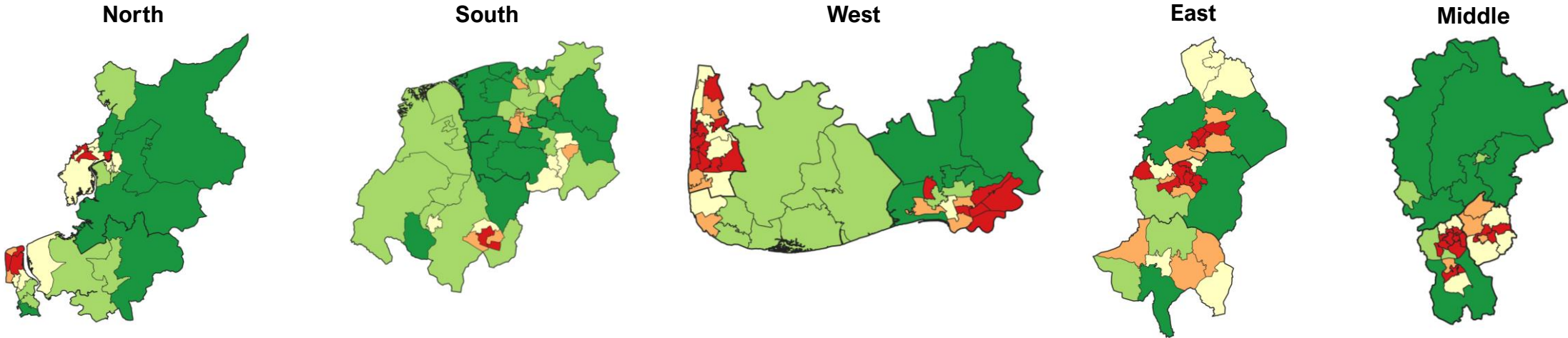




Household deprivation – 5UA

South and North have the lowest levels of household deprivation particularly South where over half of households are not deprived in any dimension. Deprivation levels are particularly low in the South where 15.6% of households are deprived in more than one dimension. Deprivation concentrated in Fleetwood and Morecambe in the North, and Skelmersdale in the South. All the remaining authorities, deprivation levels are relatively high, above the 18-19% of households deprived regionally and nationally.

Between 21.5%-22.5% of households are deprived in more than one domain in the remaining authorities. East has the highest levels of deprivation, concentrated in Burnley and Pendle; deprivation in the West is concentrated in Blackpool and Preston; Middle deprivation concentrated in Blackburn and Darwen, and Hyndburn (Church and Accrington).

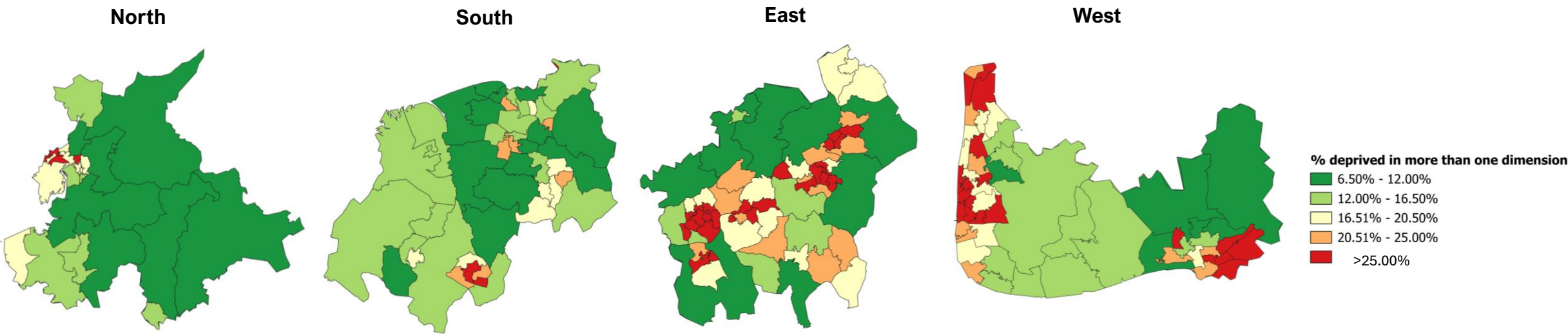


Household deprivation – 4UA B

South and North have the lowest levels of deprivation – 50-51% of households are not deprived in any dimension, and between 15.5%-16.5% are deprived in more than one dimension.

Deprivation is more concentrated in East and West – 44% of households are not deprived in any dimension, and between 21.5%-22% are deprived in more than one dimension.

Deprivation in North is concentrated in Morecambe, and in the South in Skelmersdale. In the East, deprivation is concentrated in Blackburn and Darwen, Accrington, Church, and Colne. In the West, deprivation is concentrated in Blackpool, Fleetwood, and South of Preston including Ribblesdale.



Index of Multiple Deprivation – Lancashire

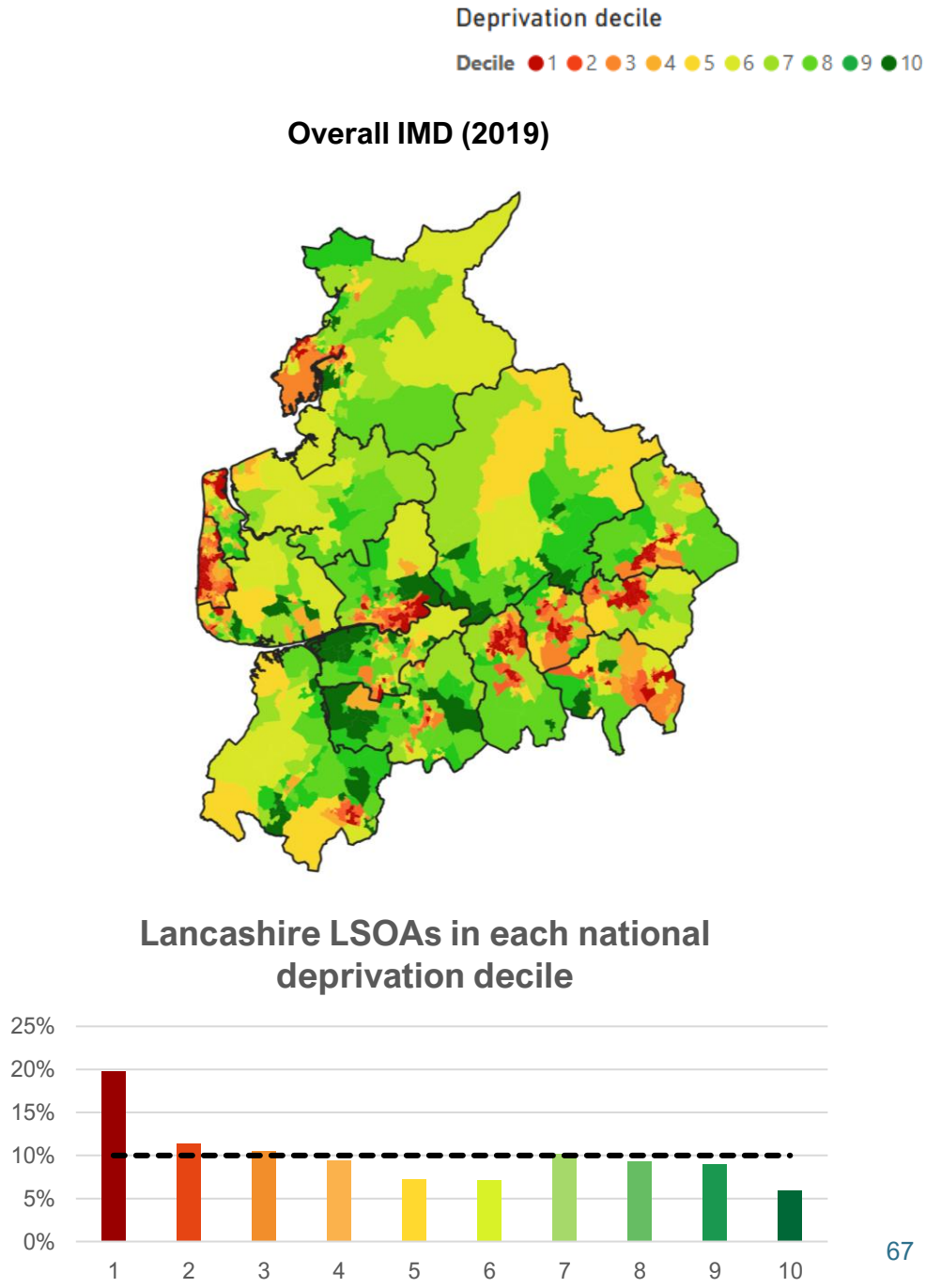
Deprivation is high in Lancashire particularly in Blackpool, Blackburn, Burnley, Pendle, and Hyndburn.

The Index of Multiple Deprivation (IMD) allows us to get a sense of deprivation at a neighbourhood level, providing a comprehensive view across seven domains. The map to the right displays how neighbourhoods rank by national deprivation decile.

Across Lancashire, around 20% of neighbourhoods rank in the top 10% most deprived nationally. Lancashire also contains 14 of the most deprived 20 neighbourhoods nationally. Blackpool has the highest levels of deprivation with over 40% of neighbourhoods in the top 10% deprived nationally – this does not describe the full extent of deprivation with 12 neighbourhoods in the most deprived 20 neighbourhoods nationally.

Deprivation is also high in Burnley where 38% of neighbourhoods are in the top 10% most deprived nationally with two neighbourhoods in the most deprived 20 nationally. In Blackburn, 36% of neighbourhoods are in the top 10% most deprived nationally, where there are two neighbourhoods in the most 50 deprived nationally. Over a quarter of neighbourhoods in both Pendle and Hyndburn are in the top 10% most deprived nationally. But there are many neighbourhoods in Ribble Valley particularly which rank towards the least 20% deprived nationally, along with South Ribble, Chorley, and West Lancashire, showing the inequality experienced across the County.

Source: MHCLG English indices of deprivation (2019)



Index of Multiple Deprivation

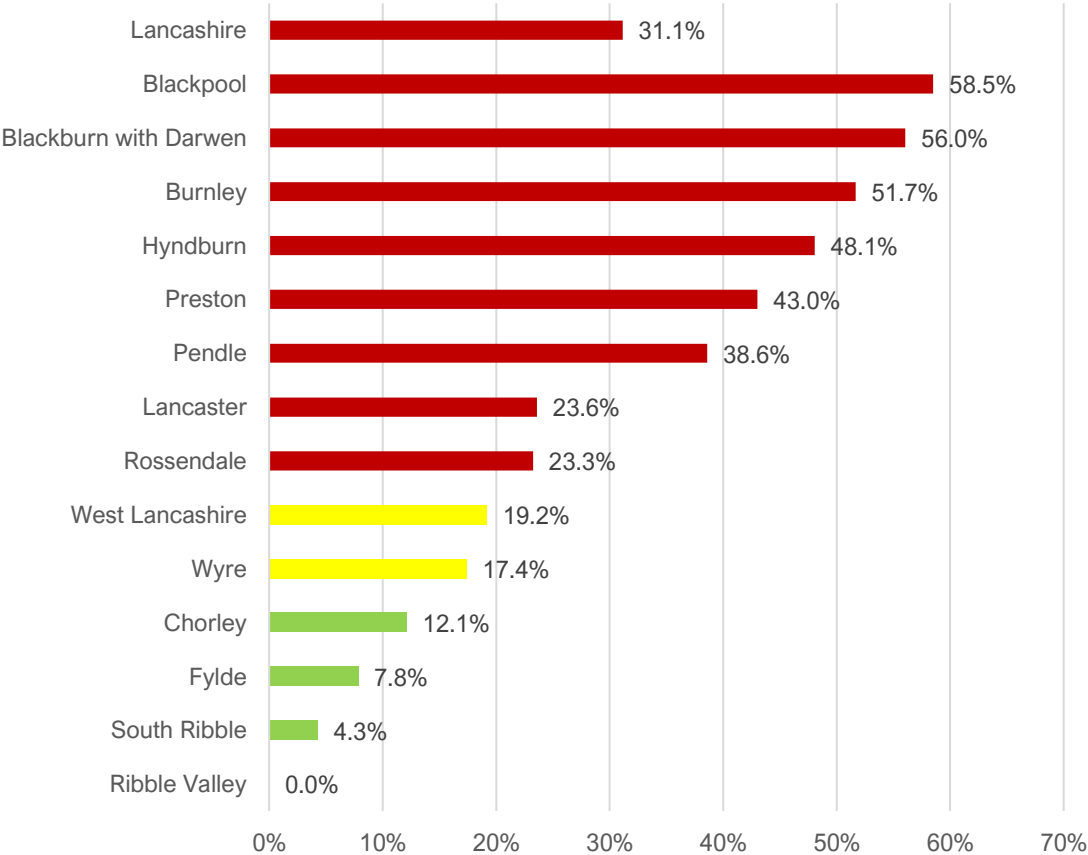
The chart to the right shows the proportion of neighbourhoods which are in the most deprived 20% nationally across the 12 districts and two unitary authorities of Lancashire.

31% of neighbourhoods are in the most 20% deprived nationally across Lancashire, with most of this concentrated in Blackpool (as explored on the last slide), Blackburn, Burnley, Hyndburn, Preston, and Pendle.

In Lancaster, almost a quarter of neighbourhoods are in the 20% most deprived nationally, much of which is concentrated in Morecambe. West Lancashire and Wyre have about 20% of neighbourhoods in the most 20% deprived nationally – in West Lancashire deprivation is concentrated in Skelmersdale. Deprivation is more spread in Wyre, but Fleetwood contains high levels of deprivation.

Inequality in lived experience in Lancashire is emphasised by no neighbourhoods in the most 20% deprived nationally in Ribble Valley, only 4% in South Ribble, and 8% in Fylde. Chorley also experiences a relatively low level of deprivation particularly when compared to other areas in Lancashire.

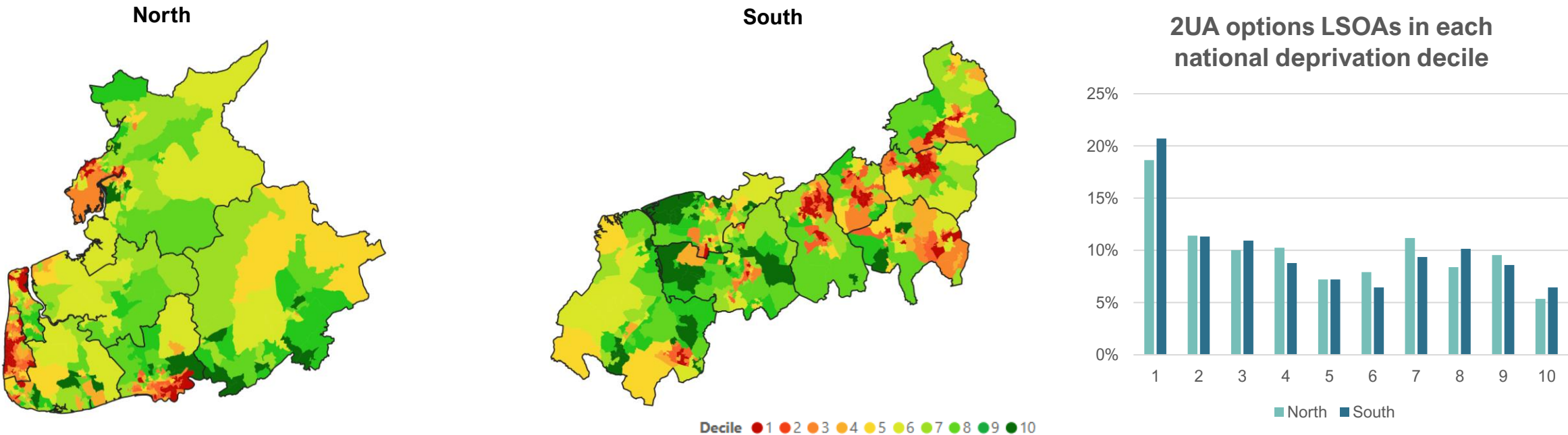
Proportion in 20% most deprived nationally



Index of Multiple Deprivation – 2UA

The South has a slightly higher level of deprivation than the North, consistent with household deprivation findings from the latest census, although again there is not too much of a difference between the two proposed authorities with 43% of neighbourhoods in the South in the top 30% most deprived nationally compared to 40.1% in the North. There is also a higher proportion of households in the top 10% most deprived in the South – 20.7% compared to 18.6% in the North.

There is inequality in experience across Lancashire – in the North, there is low deprivation in Ribble Valley, Fylde and East Preston (Elston, Grimsargh and Haighton Green) and Lancaster, but high deprivation in much of Blackpool, Fleetwood, Preston covering Ribbleton, and Morecambe. In the South, deprivation is low in South Ribble (Longton, Hutton, Walmer Bridge), Chorley (Croston, Bretherton, Eccleston) and South Blackburn (Belmont and Edgworth), with deprivation concentrated in Blackburn, Hyndburn, Pendle concentrated in Colne (Church, Accrington and Rishton) and Burnley. There are also areas of high deprivation in Skelmersdale, Bacup, and Stacksteads.

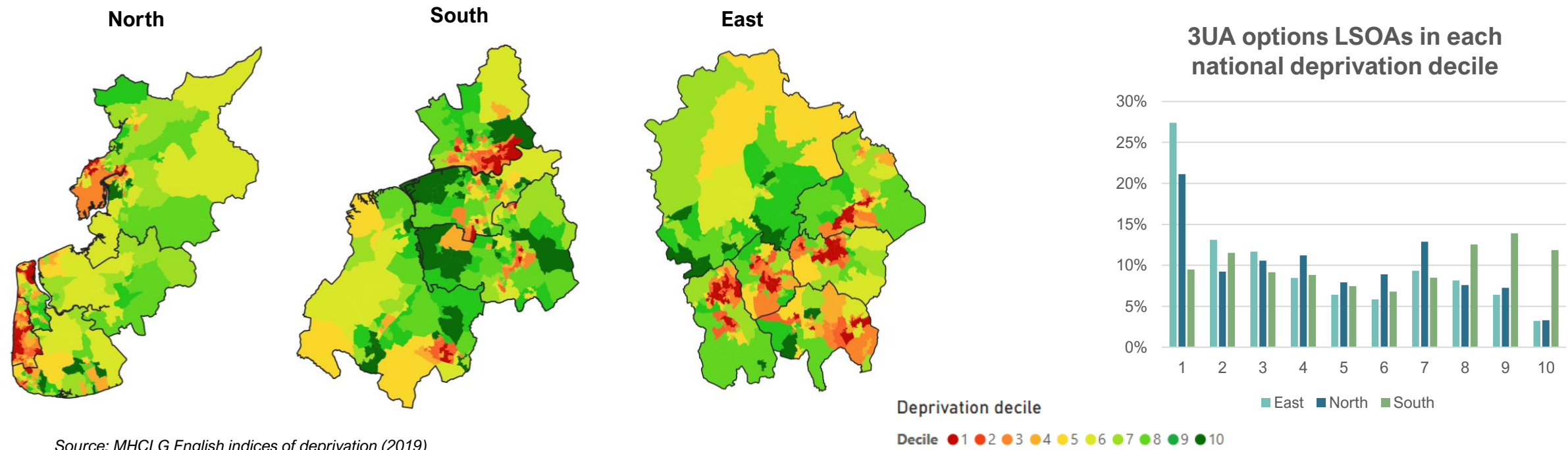


Source: MHCLG English indices of deprivation (2019)

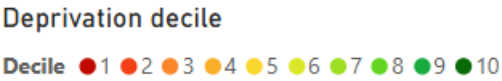
Index of Multiple Deprivation – 3UA

Deprivation is highest in the East with 41% of neighbourhoods in the top 20% most deprived nationally, followed by 30% in the North. Deprivation is lowest in the South, around the national average with 21% of neighbourhoods in the top 20% most deprived nationally, and 25% amongst the least deprived 20% nationally (compared to around 10% in the East and North).

In the East there are some areas where deprivation is low including Edgworth, Osbaldeston, Billington, and Knowle Green but high in Blackburn and Darwen, Burnley, Colne, Church, Accrington, and Oswaldtwistle. In the North, deprivation tends to be lower in Fylde and Lancaster, with deprivation concentrated in coastal areas of Blackpool, Fleetwood, and Morecambe. In the South, much of South Ribble, Chorley, and West Lancashire, there are low levels of deprivation, with high deprivation concentrated in Preston including Ribblesdale, and Skelmersdale.



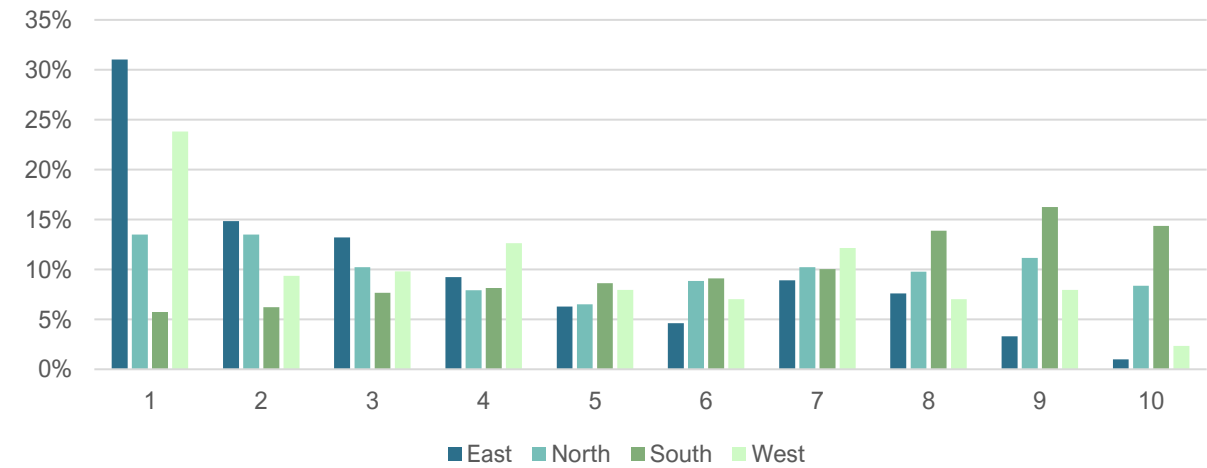
Source: MHCLG English indices of deprivation (2019)



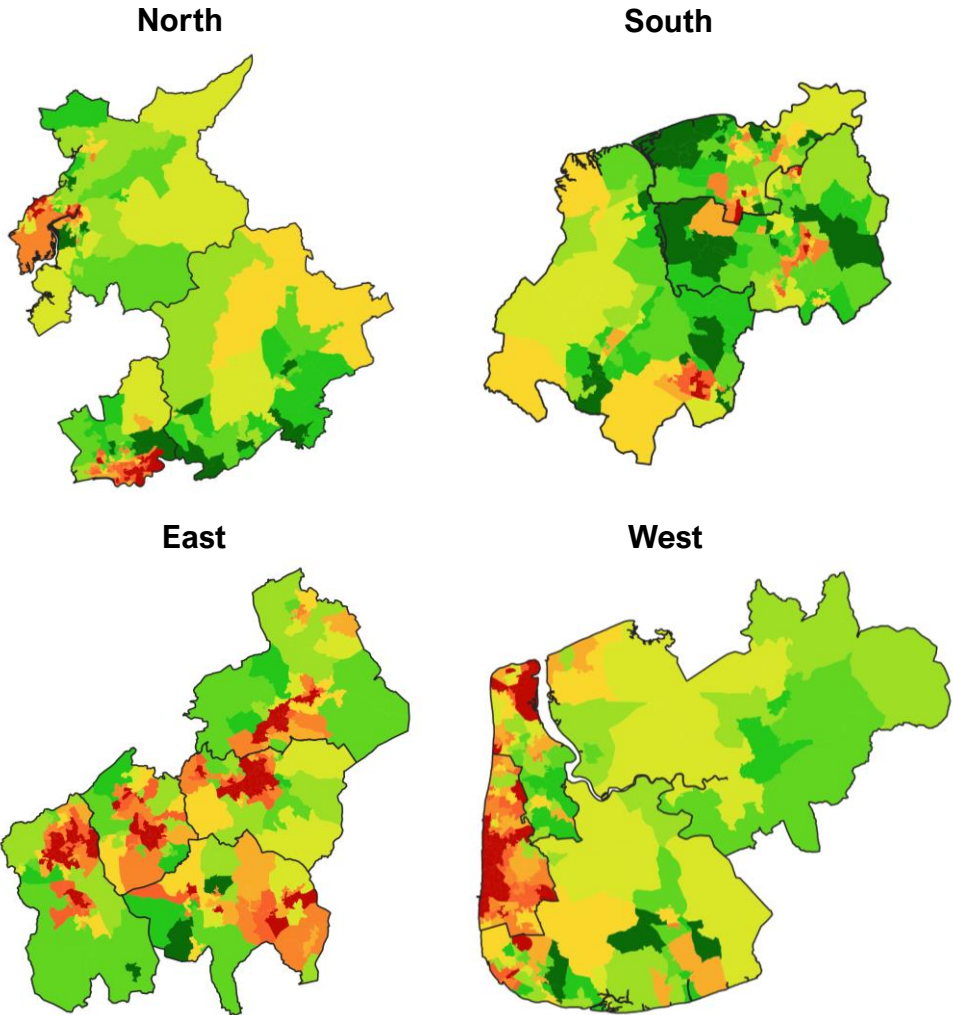
Index of Multiple Deprivation – 4UA

There is wide variation in inequality with the East experiencing by far the highest level of deprivation with almost 50% of neighbourhoods in the 20% most deprived nationally – concentrated in Blackburn and Darwen, Burney, Colne, Church, Accrington, and Oswaldtwistle. West also experiences a high level of deprivation with around a third of neighbourhoods in the top 20% most deprived nationally, which is concentrated in Blackpool and Fleetwood. Deprivation is lower in the North although there are concentrations of high deprivation in Preston and Morecambe. Deprivation is relatively low in the South with around 10% of neighbourhoods in the top 20% most deprived nationally, although there are some areas of high deprivation in Skelmersdale, some in central Chorley, and Bamber Bridge.

4UA options LSOAs in each national deprivation decile



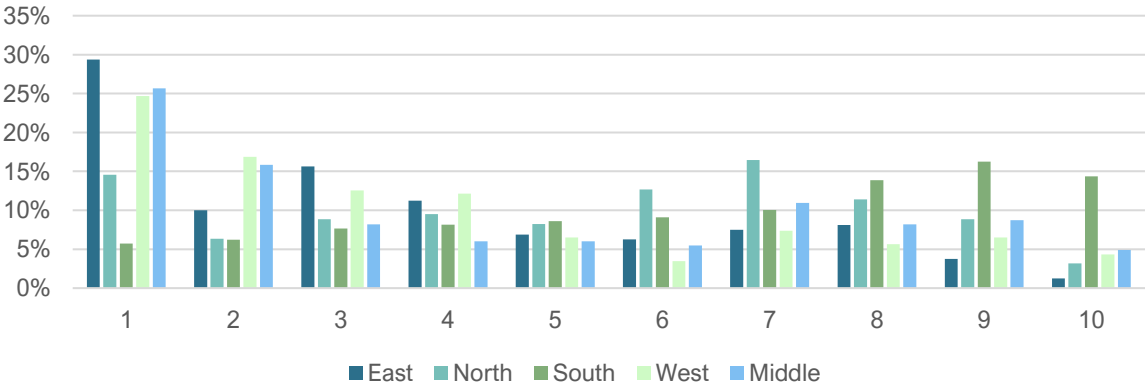
Source: MHCLG English indices of deprivation (2019)



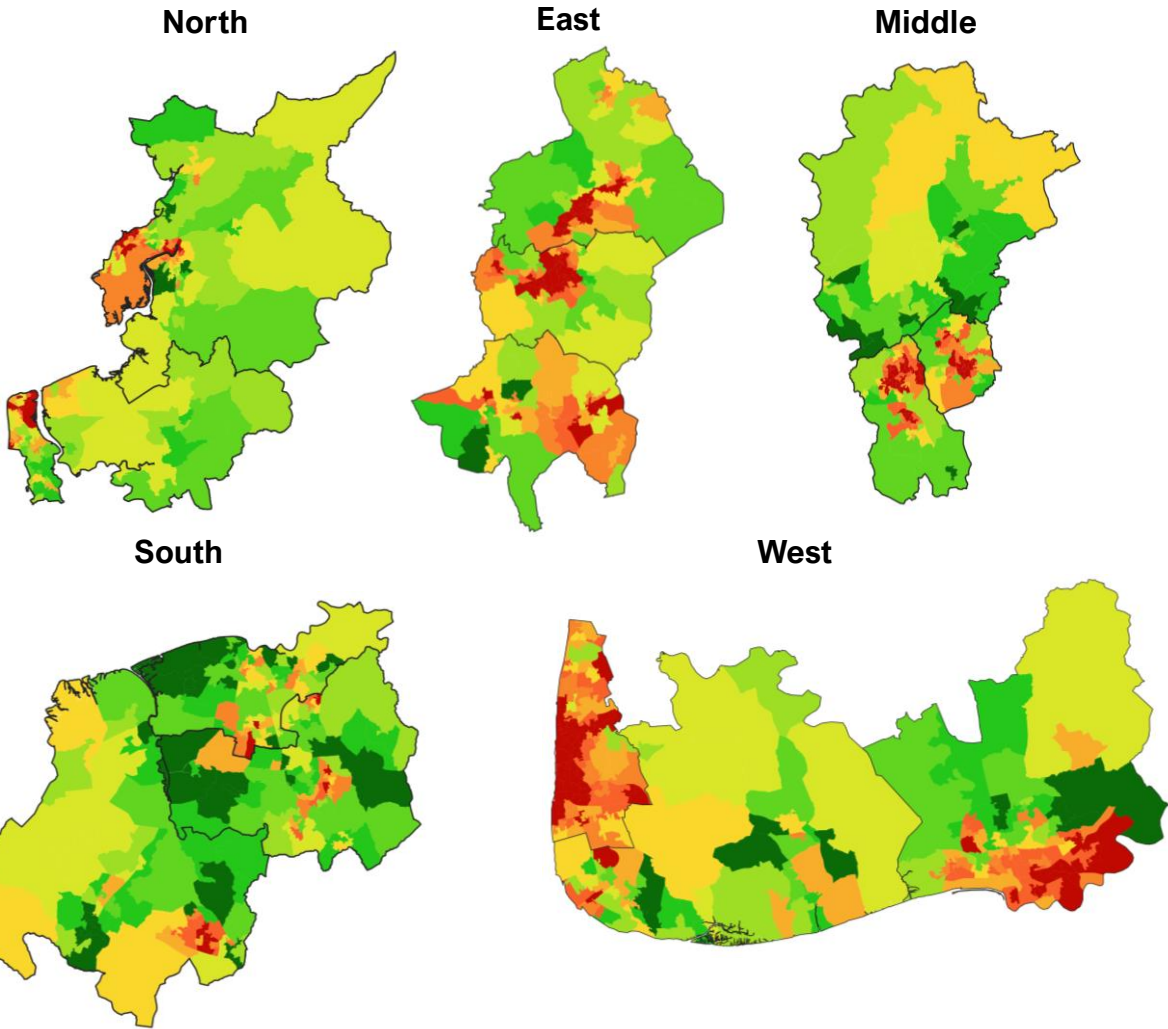
Index of Multiple Deprivation – 5UA

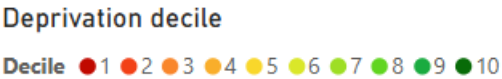
Deprivation is high in the East, Middle, and West, with a quarter or more of neighbourhoods amongst the top 10% most deprived nationally, rising to 40% of neighbourhoods in the top 20% most deprived. Deprivation is concentrated in Pendle including Colne, Nelson, Bacup and Burnley (East); Blackburn and Darwen, Church, Accrington, and Rishton (Middle); and Blackpool and Preston covering Ribbleson (West). Also 14.6% of neighbourhoods in the North are amongst the top 10% deprived nationally, with this concentrated in Fleetwood and Morecambe. South has the lowest levels of deprivation – almost a third of neighbourhoods in least 20% deprived nationally. Deprivation in South concentrated in Skelmersdale, some in central Chorley, and Bamber Bridge.

5 UA options LSOAs in each national deprivation decile



Source: MHCLG English indices of deprivation (2019)

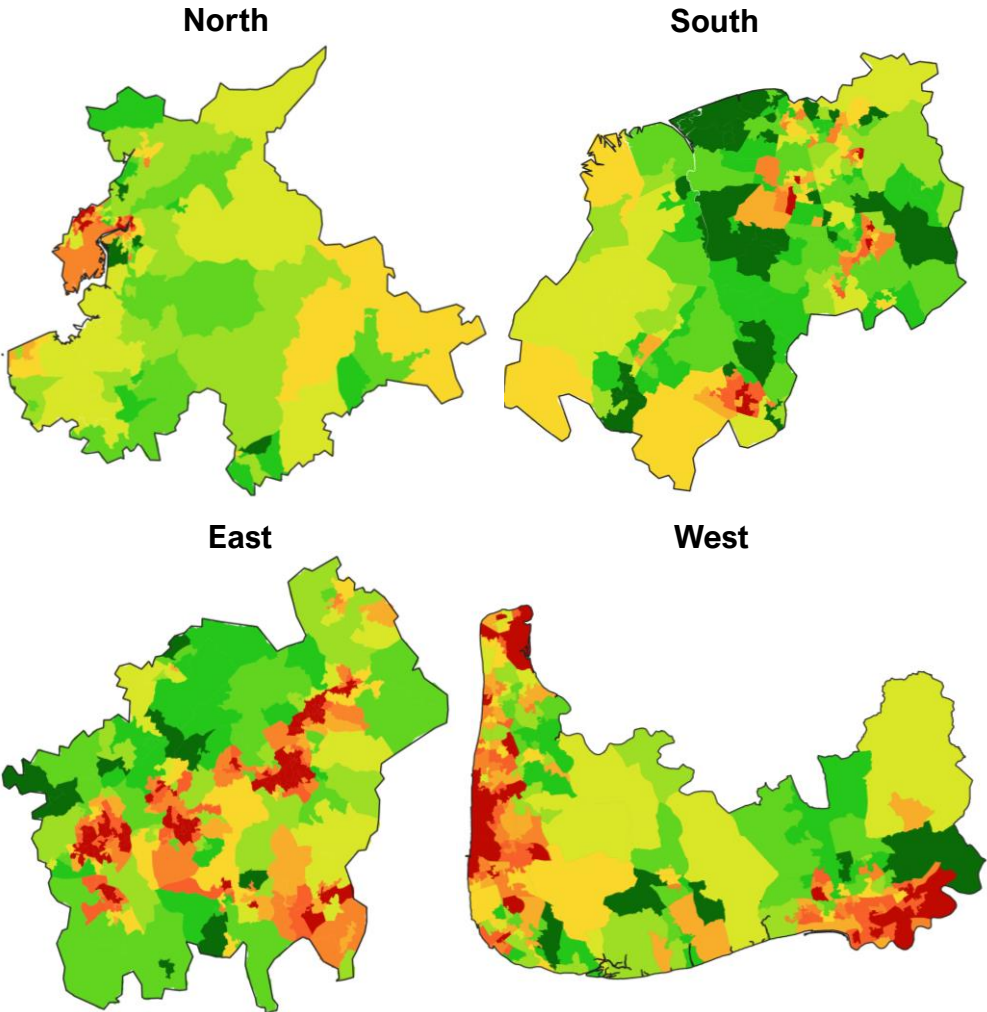




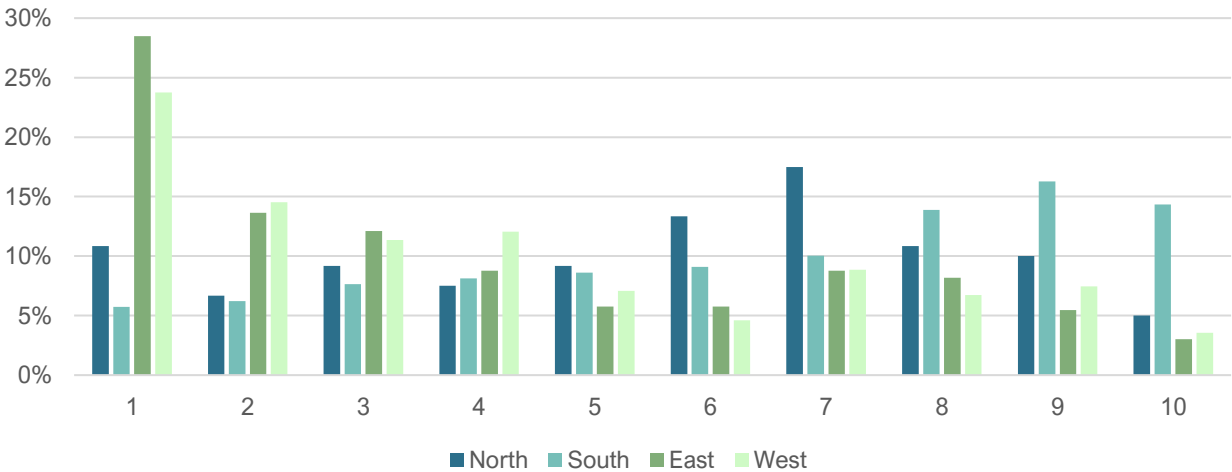
Index of Multiple Deprivation – 4UA B

Deprivation is concentrated in East and West Lancashire with both UAs having at least 50% of neighbourhoods in the top 30% most deprived nationally, rising to 54% in East.

There is a wide variation compared to North and particularly the South where deprivation is lower – 20% of neighbourhoods in top 30% most deprived nationally in South, and 27% in North - also 45% of neighbourhoods in the least 30% deprived neighbourhoods nationally in the South.



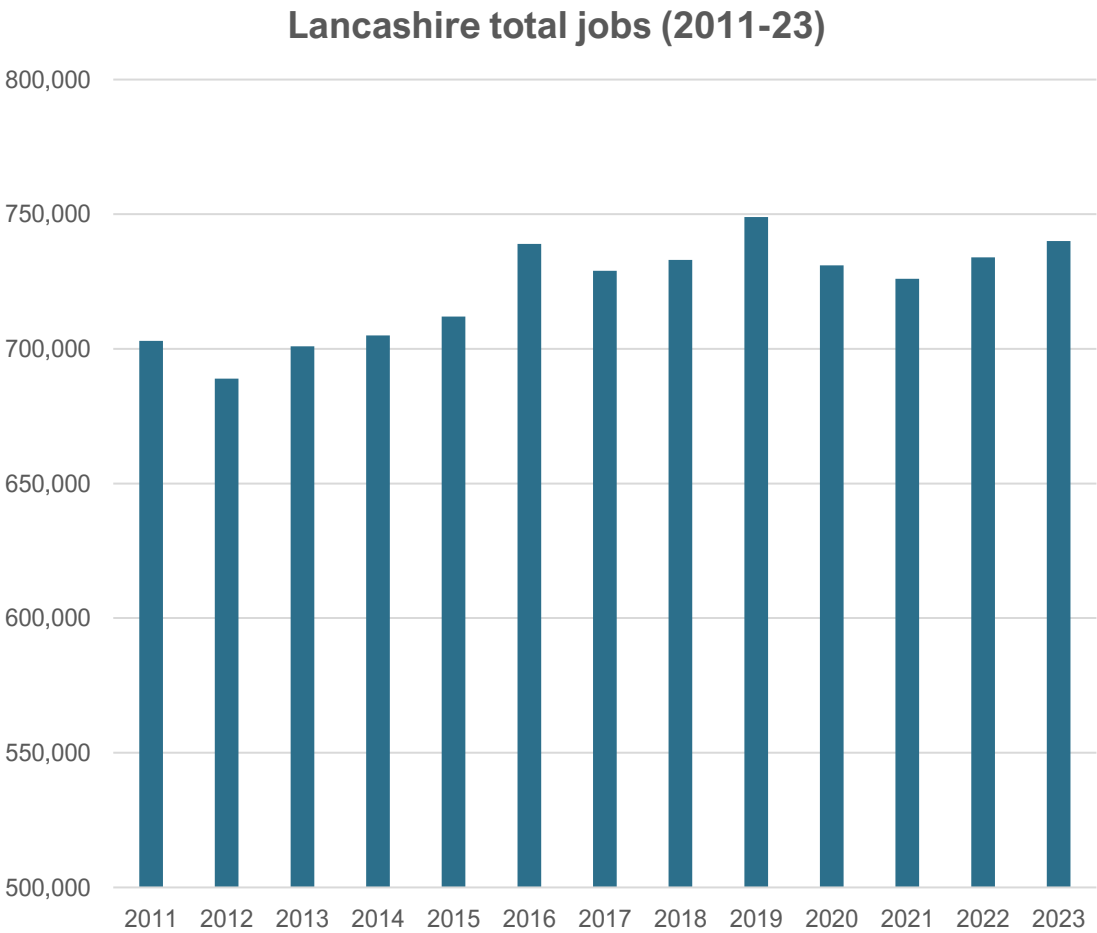
4UA B options LSOAs in each national deprivation decile



Source: MHCLG English indices of deprivation (2019)

Jobs – Lancashire

- Total jobs across Lancashire (12 districts and 2 unitary) has grown from 703,000 in 2011 by 37,000 to 740,000 in 2023, an average rise of 0.4%. However, this remains 1.2% below 749,000 jobs in 2019.
- Lancashire trails jobs growth seen regionally and nationally – since 2011, jobs growth has averaged 1.3%-1.4% across the North West and GB.
- Lancashire also contrasts with shorter term trends seen since 2019 – jobs levels have recovered nationally having fallen during the Covid-19 Pandemic and in 2023 jobs levels are 1.6% above 2019 levels.
- Regionally growth since 2019 has been more modest but has recovered and in 2023 job levels were 0.5% higher than in 2019.
- Variation in longer-term and shorter-term trends across the Lancashire districts.

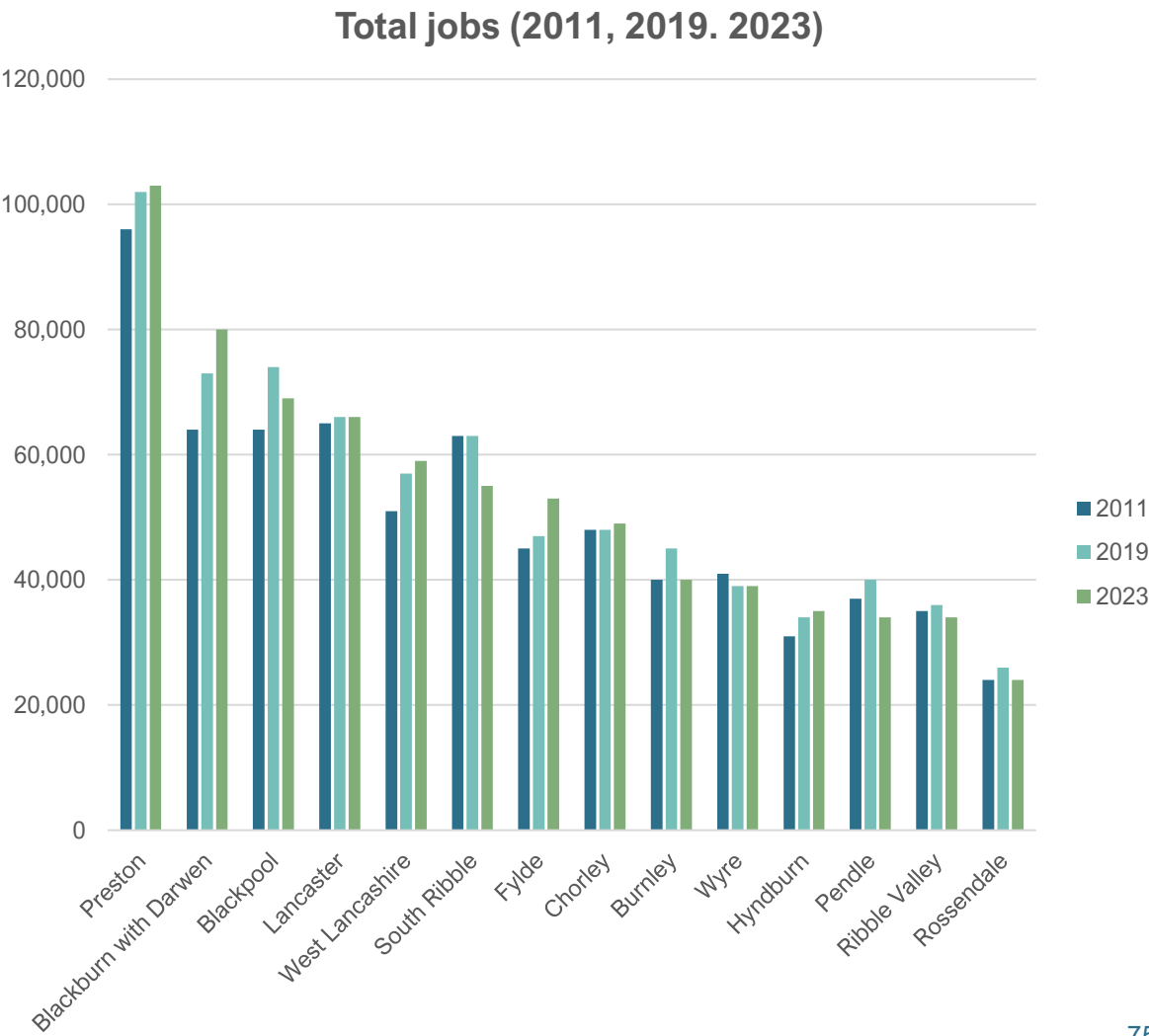


Source: Jobs Density, ONS, 2025

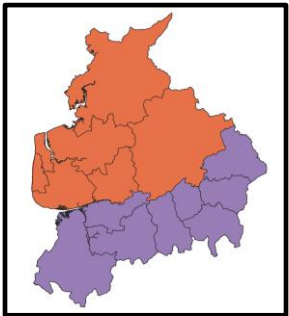
Jobs – Lancashire

- Preston and Blackburn continue to have the biggest labour markets in Lancashire, Blackburn particularly has seen the fastest jobs growth of 2.1% a year between 2011 and 2023. Preston and Blackburn combined contribute a quarter of total jobs in Lancashire.
- Blackburn, Fylde, West Lancashire, and Hyndburn have seen average jobs growth of 1% or above between 2011 and 2023.
- However, many districts have seen much modest jobs growth and in some areas the number of jobs has fallen since 2011:
 - South Ribble has seen an average fall of 1-% a year in jobs; Pendle a -0.7% decline; Wyre a 0.4% decline; and Ribble Valley a -0.2% decline. Burnley and Rossendale show no change in jobs between 2011 and 2023. Lancaster and Chorley a 0.1%-0.2% annual rise in jobs. Preston and Blackpool have seen a 0.6%-0.7% rise in jobs.
- Jobs levels continue to remain below 2019 levels in Pendle (-15%), South Ribble (-12.7%), Burnley (-11.1%), Rossendale (-7.7%), Blackpool (-6.8%), and Ribble Valley (-5.6%).
- Fylde (12.8%) and Blackburn (9.6%) have seen a strong recovery in jobs, West Lancashire (3.5%), Hyndburn (2.9%), and Chorley (2.1%) have all seen stronger growth than 1.6% nationally between 2019 and 2023.

Source: Jobs Density, ONS, 2025

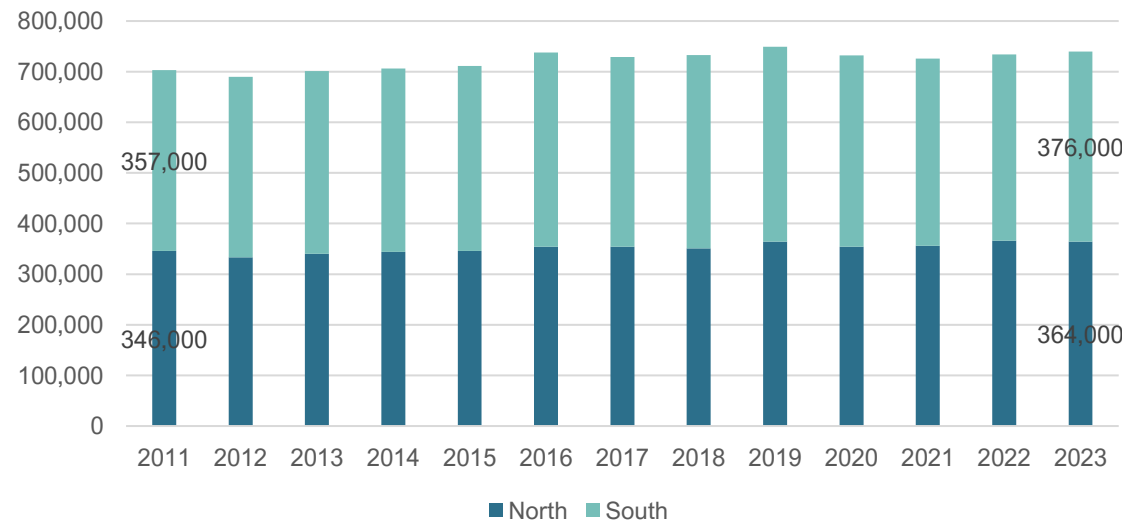


Jobs – 2UA



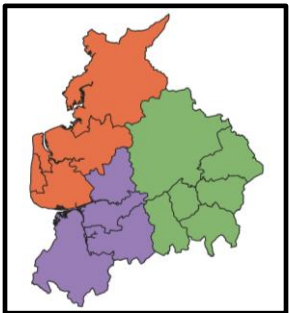
- An even split of jobs with South having a slightly higher proportion of 51%. Jobs have grown by 0.4% on average between 2011 and 2023 to 376,000 – a rise of 19,000.
- North has also seen a 0.4% annual rise in jobs between 2011 and 2023, a rise in 18,000 jobs to 364,000.
- Both UAs have seen well below 1.3% regional and national growth.
- Jobs in the North have just recovered to 2019 levels – regionally job levels are 0.5% above 2019 levels, and 1.6% higher nationally.
- However, jobs in the South are 2.3% below where they were in 2019, where jobs reached a peak of 385,000.

Jobs 2UA (2011-23)

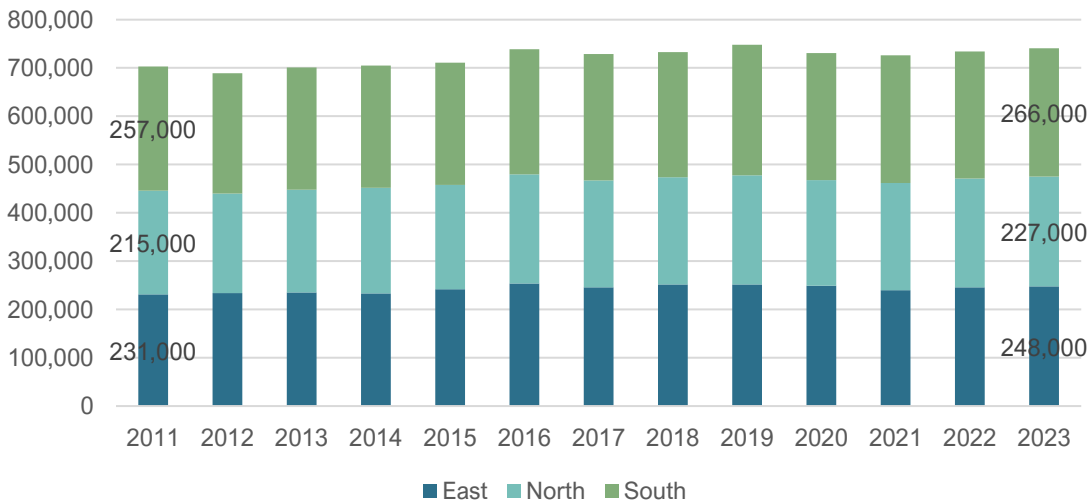


Source: Jobs Density, ONS, 2025

Jobs – 3UA

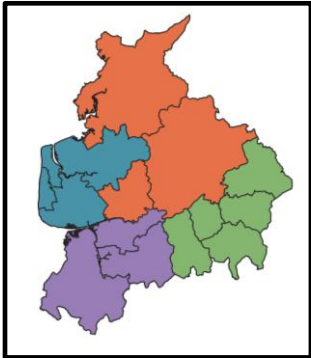


Jobs 3UA (2011-23)

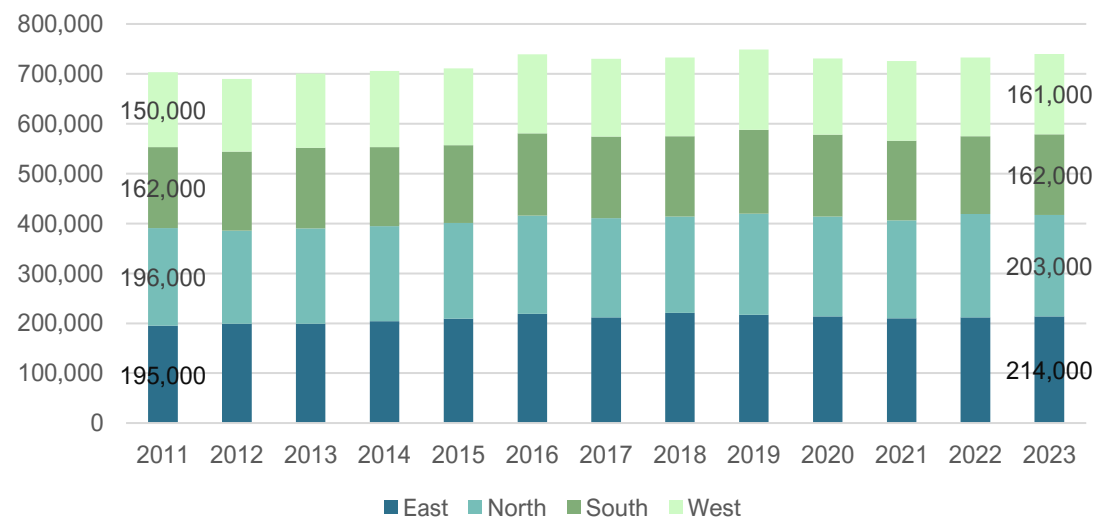


- South has the highest proportion at over a third of jobs (36.6%), East around a third of jobs (32.9%), and North just over three in ten of jobs (30.6%).
- East has seen the fastest rise in jobs of 0.6% a year since 2011, the highest rise of 17,000 jobs.
- North has seen the next fastest rise in jobs of 0.5% a year – 12,000 more jobs in 2023 than in 2011.
- South has seen the slowest growth in jobs since 2011 of 0.3% a year, a rise of 9,000 jobs although the South remains the biggest labour market.
- Jobs levels in East and South remain around 1.5% below 2019 levels. Jobs levels have recovered in North Lancashire, and are 0.4% above levels in 2019, roughly in line with growth seen regionally but below 1.6% growth seen nationally.

Jobs – 4UA



Jobs 4UA (2011-23)



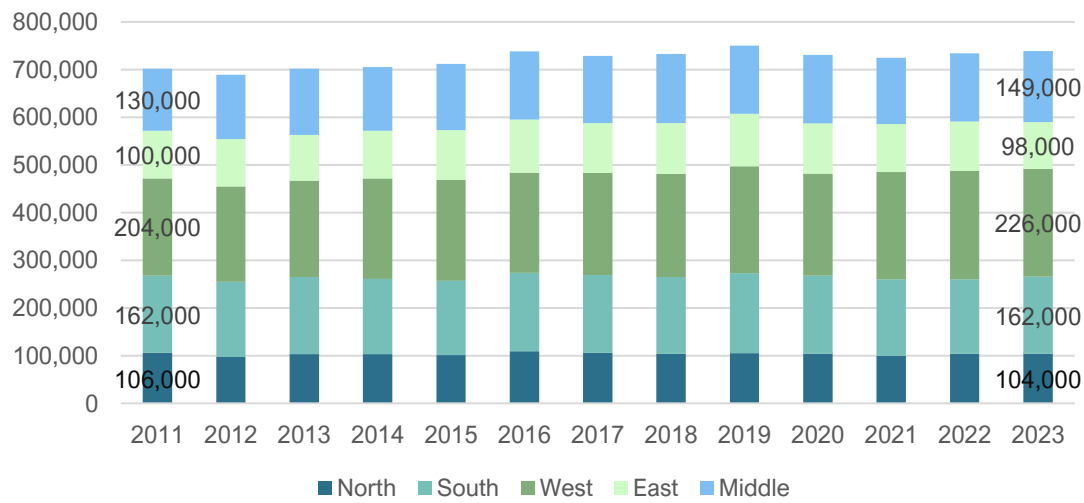
- North and East have the highest number of jobs at around 28% each – 214,000 and 203,00 respectively. South and West Lancashire each contributing around 22% of total jobs – 162,000 in South and 161,000 in West Lancashire.
- East has seen the fastest growth since 2011 of 0.8% a year – a rise in 19,000 jobs, although this remains below 1.3%-1.4% growth seen regionally and nationally.
- West has seen average growth of 0.6% a year, a rise of 11,000 jobs between 2011 and 2023.
- Growth has been more modest of 0.3% in the North by 7,000 jobs.
- There has been no growth in jobs in the South between 2011 and 2023, with a -3.6% fall since 2019. East has also seen a decline in jobs since 2019 of -1.4%.
- North and West UAs have seen a recovery in jobs back to 2019 levels but no growth so below 0.5% regionally and 1.6% nationally.

Source: Jobs Density, ONS, 2025

Jobs – 5UA

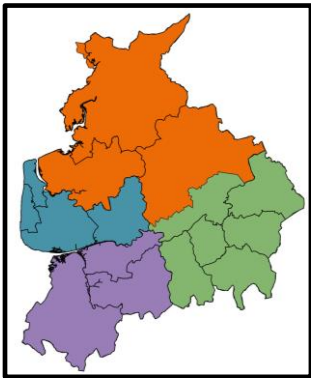


Jobs 5UA (2011-23)

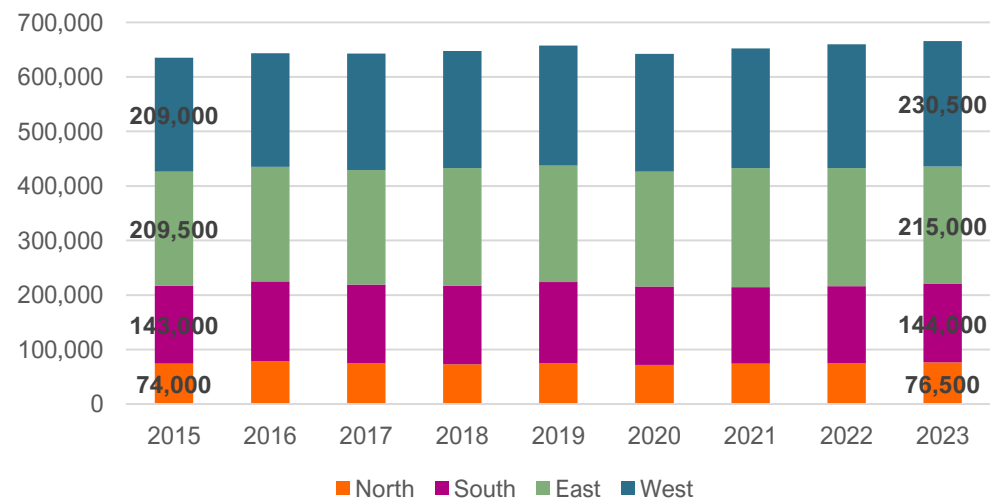


- West has the largest labour market, accounting for three in ten jobs (30.5%) of 226,000 jobs. South and Middle account for around 20% of jobs, 162,000 and 149,000 respectively. North and East far lower proportion of between 13-14% of jobs – 98,000 and 104,000 respectively.
- Middle has seen the fastest growth in jobs of 1.2% a year between 2011 and 2023, a rise of 19,000 jobs, the only authority with growth roughly in line with regionally and nationally. West also seen fairly strong growth of 0.9% a year, a rise of jobs by 22,000.
- Of the remaining authorities, there has either been no growth in the South or a decline in jobs of -0.2% a year in the North and East, the two smallest labour markets of the proposed authorities.
- Middle has continued to see jobs growth since 2019, with jobs levels 4% higher in 2023. West has also seen growth of 0.9% – both above regional growth, and Middle well above 1.6% growth nationally.
- East a strong decline of -11% since 2019, impacting long-run change in jobs. South has seen a -3.6% decline, and North a -1% decline between 2019 and 2023.

Jobs – 4UA B



Total employment 4UA B (2015-23)

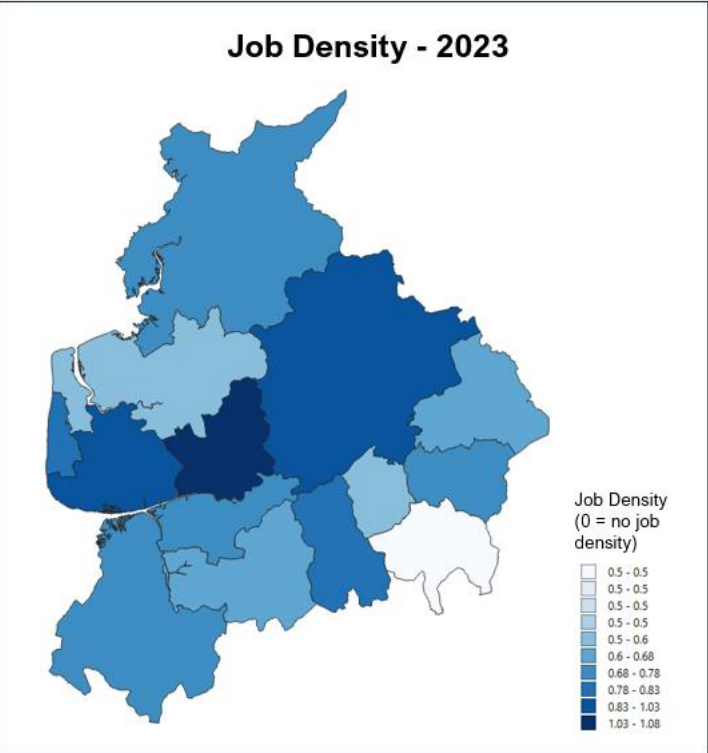
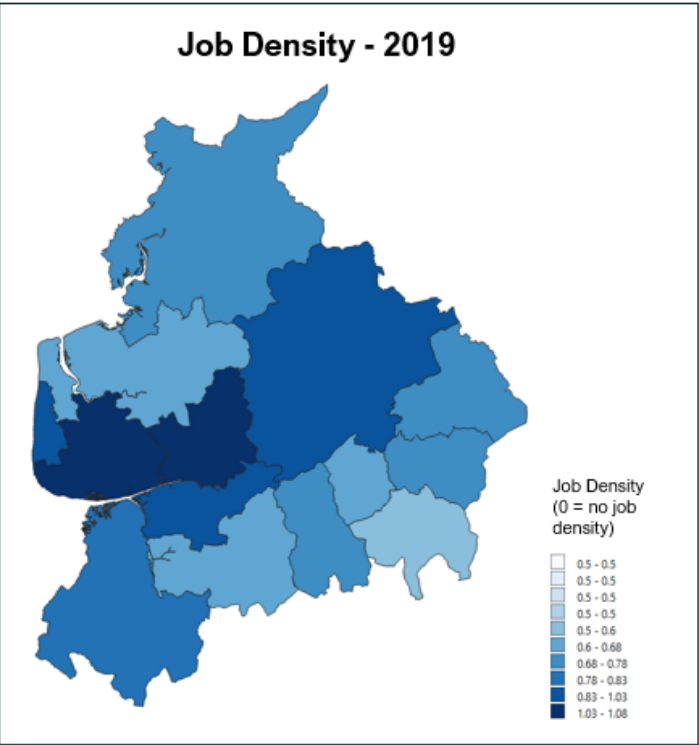


Jobs data is unavailable below local authority level therefore we have utilised data from the Business Register and Employment Survey to estimate the number of people in employment across the 4UAs

- Around 680,000 people were in employment across Lancashire in 2023, a 0.6% annual rise since 2015.
- West Lancashire has the highest number in employment and fastest rise in employment of 1.2% a year – West Lancashire accounts for 35% of total employment.
- East Lancashire has seen more modest growth of 0.3% a year between 2015 and 2023 but combined with West Lancashire, accounts for the majority of employment in Lancashire. Combined West and East Lancashire account for two thirds of total employment.
- South Lancashire has seen the slowest growth in total employment, with employment remaining largely unchanged between 2015-23. South Lancashire accounts for 22% of total employment.
- North Lancashire has seen 0.4% annual growth in employment, accounting for 11.5% of total employment.

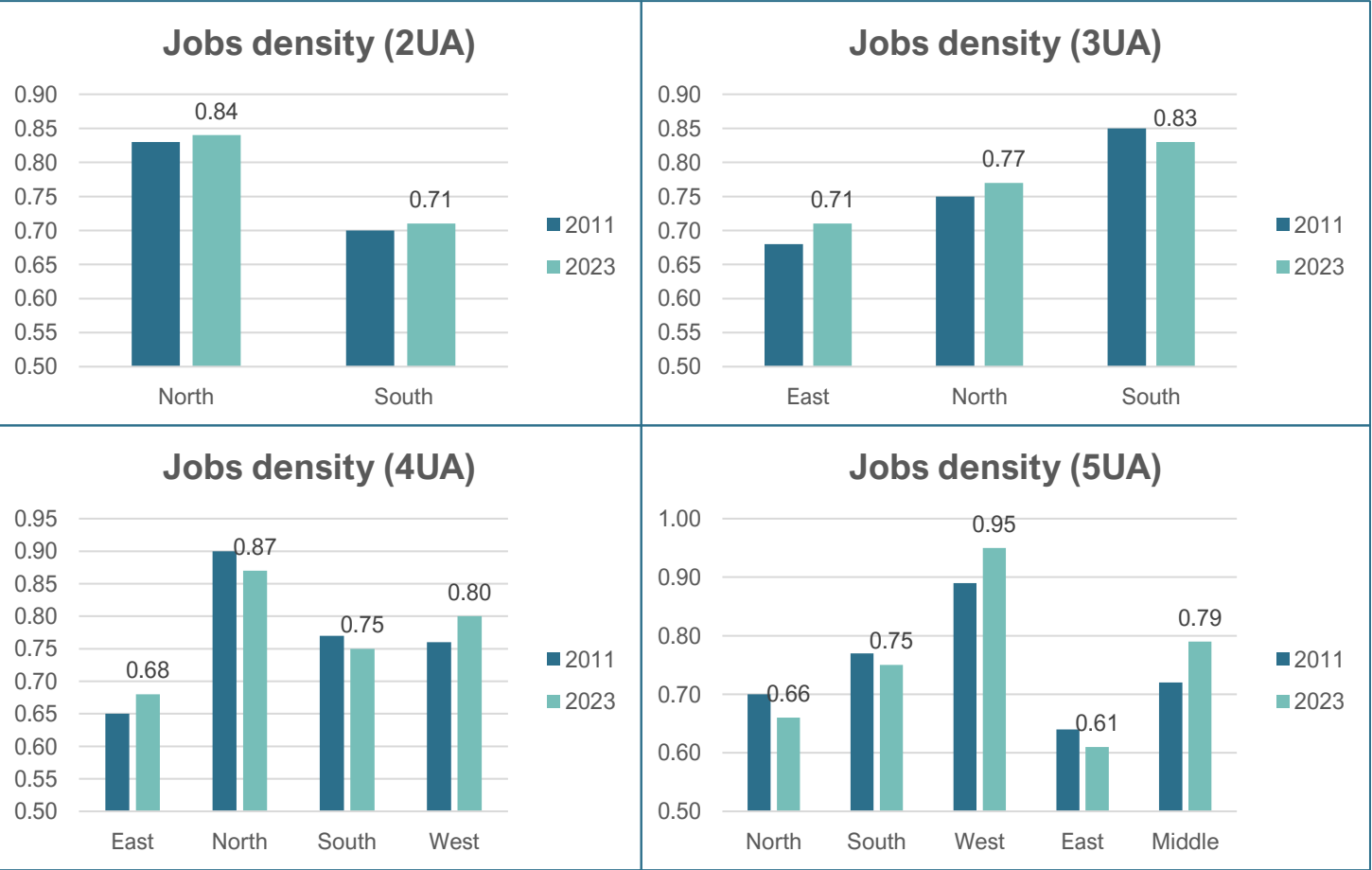
Jobs density

Job density refers to the number of jobs available in a specific geographic area per working age resident. In 2023, jobs density in Lancashire (0.77) was lower than both the North West (0.83) and Great Britain (0.86), indicating a relatively lower concentration of employment opportunities in Lancashire compared to regional and national averages.



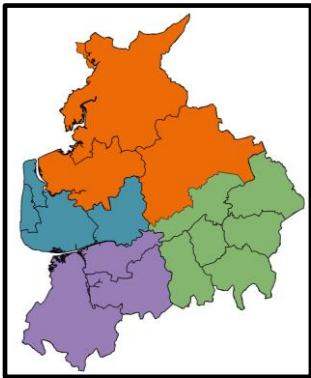
- High job density districts, including Preston, Fylde and Ribble Valley, consistently maintained job densities above 0.9, with Preston showing a steady upward trend peaking at 1.08 in recent years.
- Medium job density districts, including Blackpool, South Ribble, West Lancashire, Blackburn with Darwen, Burnley, and Lancaster, generally hovered between 0.7 and 0.9. Most showed modest growth or stability, with Blackpool and South Ribble reaching the upper end of the medium range.
- Low job density in Rossendale, Wyre, Hyndburn, Pendle, and Chorley, remained below 0.7 throughout the period. Rossendale, in particular, saw a gradual decline, indicating persistent challenges in local employment concentration.

Jobs density – UA options

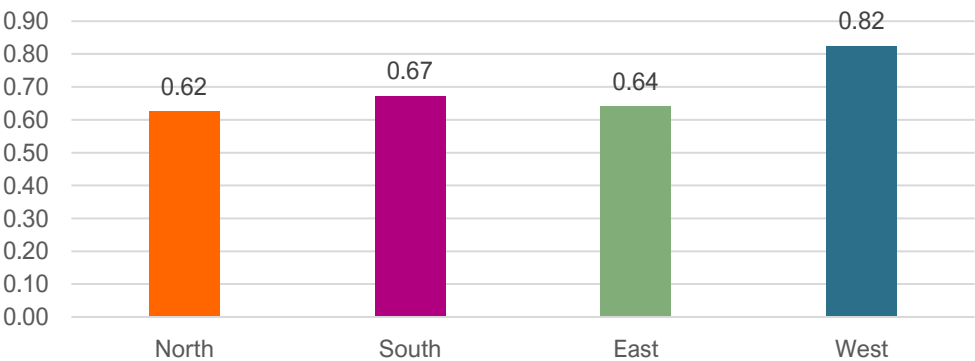


- Jobs Density in Lancashire has shown little change since 2011 – in 2023 there were 0.77 jobs per working age resident in Lancashire, below 0.83 regionally and 0.86 nationally.
- 2UA:** both have seen a slight increase with North at 0.84 at the regional average far higher than 0.71 in South.
- 3UA:** South highest jobs density although a slight fall of 0.02 to 0.83 in 2023. North and East have seen growth but remains well below regional average particularly in the East.
- 4UA:** North in line with national average at 0.87 despite a slight fall. West roughly in line with regional average at 0.80. East some growth but well below the regional average at 0.68 and despite some growth in South also below regional average at 0.75.
- 5UA:** West strong growth with highest jobs density above national average at 0.95 by far highest of proposed authorities. All remaining authorities below regional average of 0.83 particularly the East at 0.61. North, East, and South have seen falls in jobs density, Middle has seen strong growth but remains slightly below regional average.

Jobs density – 4UA B



Number in employment per working age resident (2023)



Jobs data are unavailable below local authority level, therefore we have utilised data from the Business Register and Employment Survey to estimate the number of people in employment across the 4UAs.

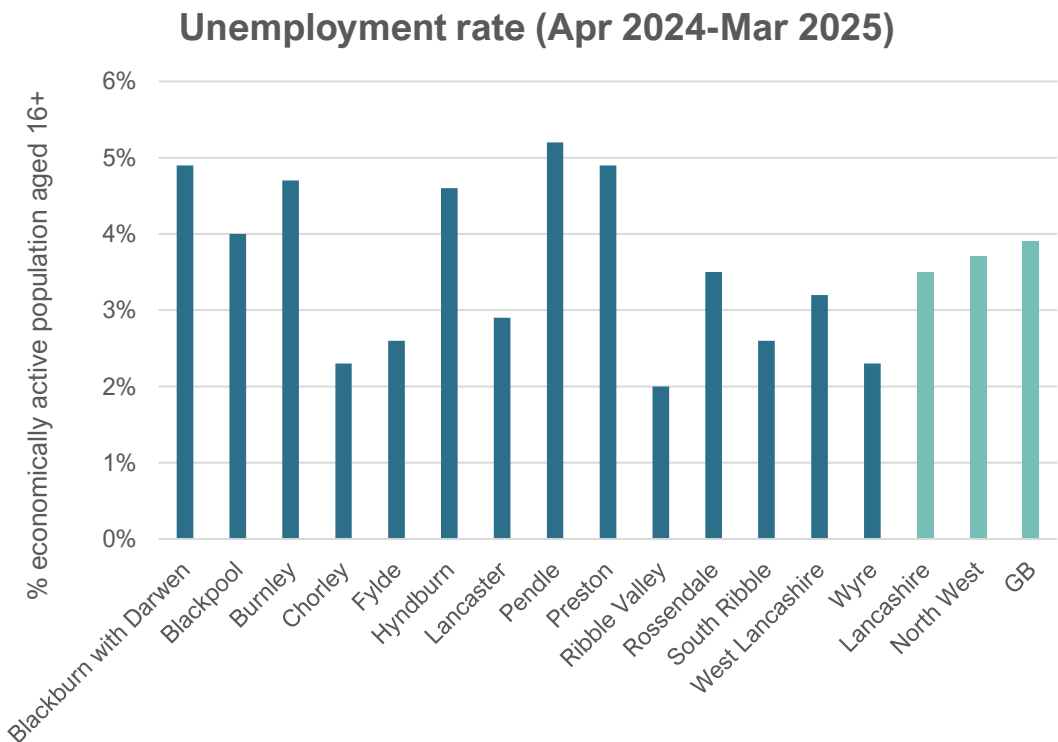
We have divided this by the number of working age (16-64) residents to calculate the number of people in employment per working age resident as a proxy for jobs density.

- Across Lancashire there were 0.70 in employment per working age resident in 2023.
- West has by far the highest number in employment per working age resident of 0.82.
- The three remaining UAs have more similar employment levels per working age resident, although the North which has the lowest number of jobs also has the lowest number in employment per working age resident.

Notes: 2023 estimates have been calculated by projecting latest ward level population estimates using historical population growth trends.
Source: Business Register and Employment Survey, ONS, 2024; Ward-level population estimates, ONS, 2024

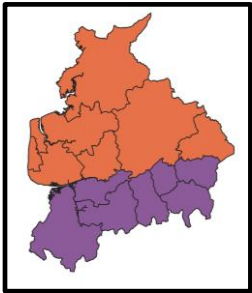
Unemployment Rate

As unemployed residents form a small percentage of the population, the Annual Population Survey (APS) unemployment estimates within local authorities are based on very small sample so for many areas are unreliable. Therefore, for this analysis we are utilising model-base estimates; the model-based estimate improves on the APS estimate by borrowing strength from the claimant count to produce an estimate that is more precise i.e. has a smaller confidence interval.

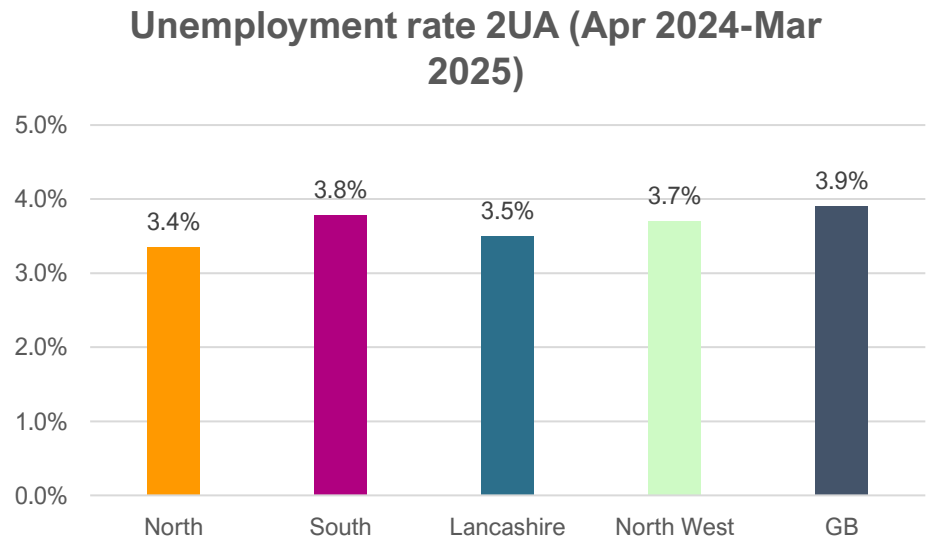


- Between April 2024 – March 2025, Lancashire districts had varying unemployment rates.
- Of the 12 districts and two unitaries, six had a higher unemployment rate than the 3.9% national average of the economically active population – Blackburn with Darwen, Blackpool, Burnley, Hyndburn, Pendle, and Preston.
- This concentration of higher unemployment in nearly half of the county’s areas may suggest underlying economic challenges.
- Historical data shows that these areas have consistently experienced higher unemployment rates over the past 15 years. Unemployment was particularly elevated in the early 2010s, declined through the mid to late 2010s, but ultimately settled at a baseline that remains above the national average.

Unemployment Rate – 2UA

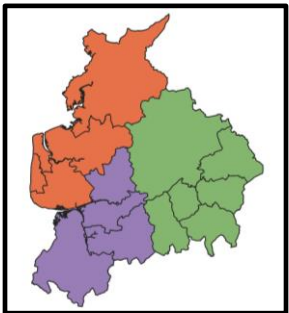


- Unemployment rate higher in South at 3.8%, but this is in line with both the 3.7% regional average and 3.9% national average
- North a slightly lower unemployment rate of 3.4% but not much difference between the 2UAs – the least difference of 0.4 percentage points between the area with the highest and lowest unemployment across options.

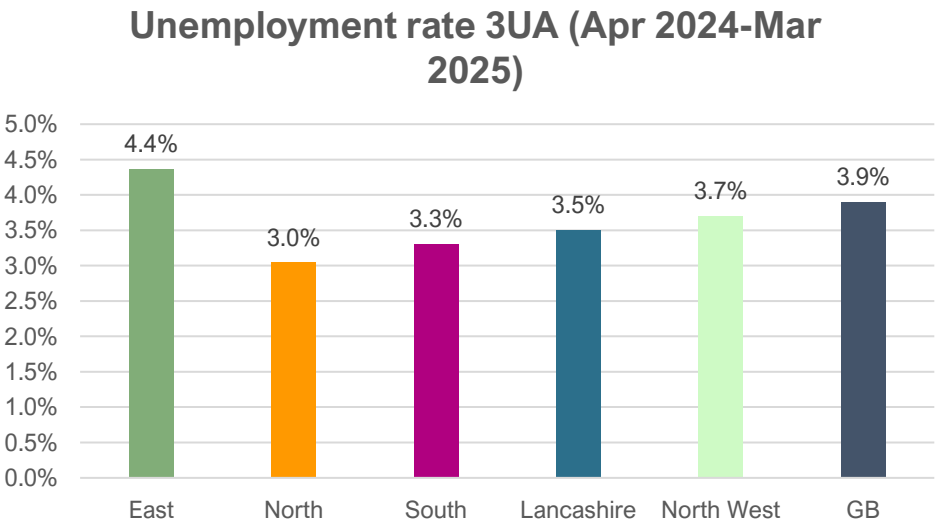


Source: Model-based estimates of unemployment, Annual Population Survey, 2025

Unemployment Rate – 3UA

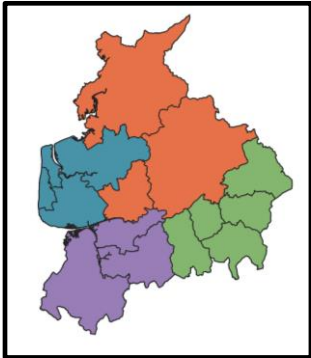


- The East has the highest unemployment rate of 4.4%, above the 3.7% regional average and 3.9% GB average – unemployment high in Pendle, Blackburn, Burnley, and Hyndburn of at least 4.5%, whereas unemployment in Ribble Valley is amongst the lowest across Lancashire.
- North and South have a lower unemployment rate. In the North, unemployment is low in Wyre and Fylde. Unemployment rate is high in Preston but across the South unemployment is generally relatively low including in Chorley and South Ribble.
- The gap between UAs with the highest and lowest unemployment rate is 1.3 percentage points, amongst the lowest of options (2.0 percentage points in 4UA and 1.8 percentage points in 5UA and 4UA B).

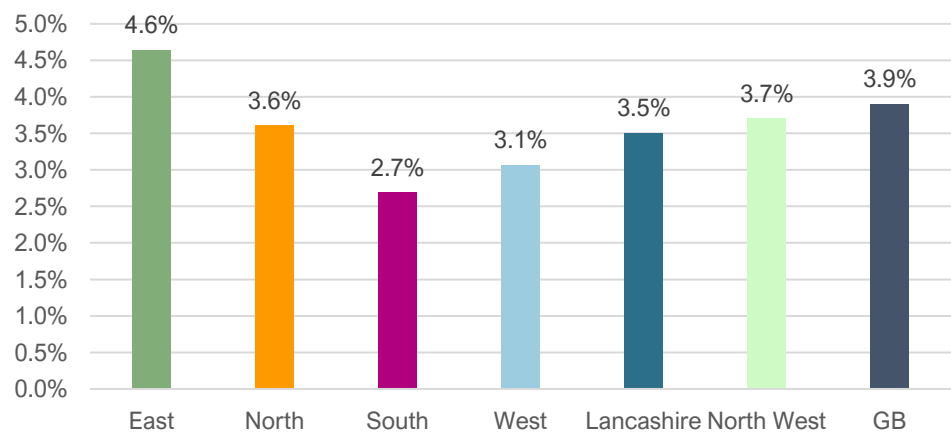


Source: Model-based estimates of unemployment, Annual Population Survey, 2025

Unemployment Rate – 4UA

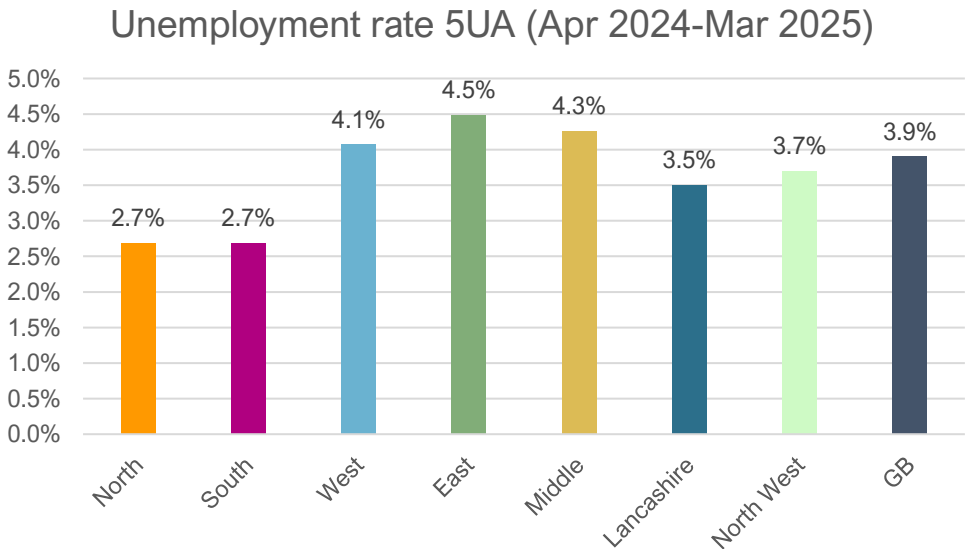


Unemployment rate 4UA (Apr 2024-Mar 2025)



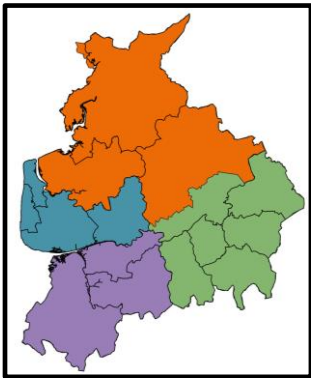
- The East has the highest unemployment rate of 4.6%, above the 3.7% regional average and 3.9% GB average – unemployment high in Pendle, Blackburn, Burnley, and Hyndburn of at least 4.5%. Across options, East 4UA has the highest unemployment rate although is at a similar level to East 3UA and East 5UA.
- North and West have a lower unemployment rate. Unemployment is low across the South in Chorley, South Ribble, and West Lancashire. In the West UA, unemployment is low in Wyre and Fylde.
- Unemployment rate in the North is at the regional average. There is significant variance between Preston where unemployment is nearly at 5% and Ribble Valley where unemployment is at around 2%.
- The gap between UAs with the highest and lowest unemployment rate is 2.0 percentage points, the highest across options.

Unemployment Rate – 5UA

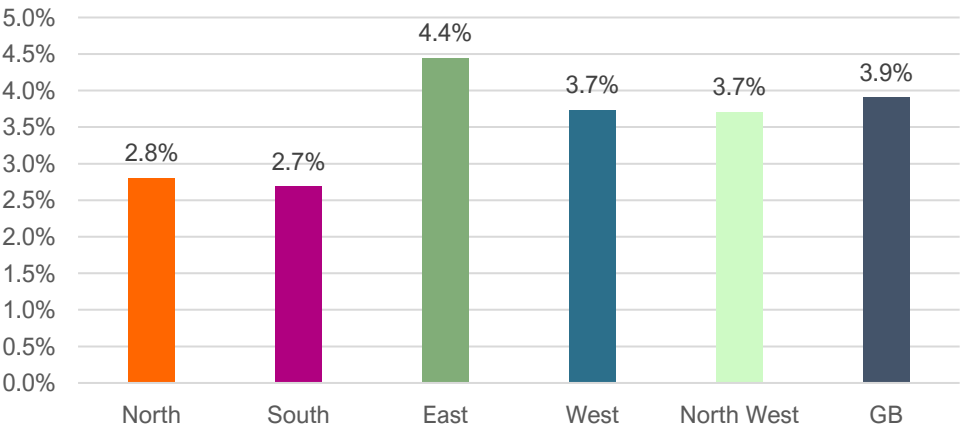


- The East has the highest unemployment rate of 4.5%, above the 3.7% regional average and 3.9% GB average – unemployment high in Pendle and Burnley around 5%.
- Middle and West UAs also have relatively high levels of unemployment above the national average. In Middle, unemployment is highest in Blackburn and Hyndburn, and Preston in the West.
- Unemployment is lowest in North and South at 2.7% – lowest in Wyre in the North, and Chorley and South Ribble in the South.
- The gap between UAs with the highest and lowest unemployment rate is 1.8 percentage points, amongst the highest across options.

Unemployment rate – 4UA B



Unemployment rate 4UA B (Apr 2024 – Mar 2025)



LSOA/ward level data are available for employment/economic activity from the latest Census however this was collected during 2021 when Covid restrictions were still in place. A significant number of people were placed on the UK’s furlough scheme or more likely to have been made redundant whilst restrictions impacted on business operations, therefore economic activity levels were low compared to historic levels.

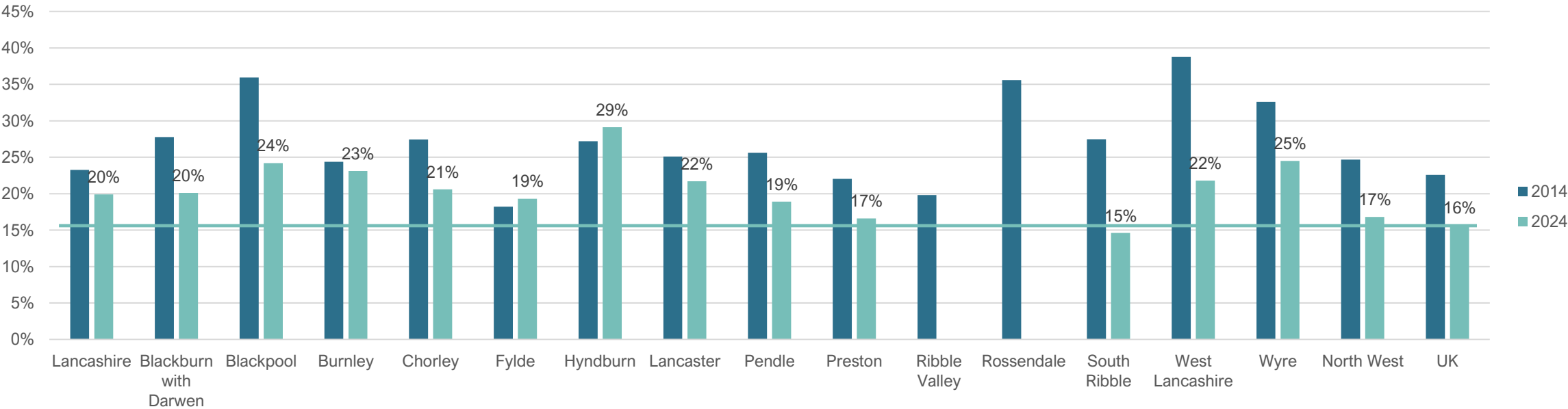
As such we have approximated unemployment rates by taking the proportion of working age population made up in Ribble Valley North and Ribble Valley South of Ribble Valley; and of Urban and Rural Wyre of Wyre. Then we have used these approximations to estimate total count of those who are unemployed (model based) and the total economically active population, summed these to respective UAs and then divided the count of unemployed by the economically active population.

- South and North have the lowest levels of unemployment, similarly to the 3 and 5 options.
- There is then a rise in unemployment to the West which is in line with the regional average.
- East has the highest unemployment rate which is consistent across options (South East in option 5). The gap between the area with the highest unemployment in East and lowest in North is 1.8pp, not the highest but there remains significant variance.

Proportion of employees earning below the living wage

There has been a reduction in the proportion of employees earning below the living wage from 23% to around 20% across Lancashire (12 districts and 2 unitary) between 2014 and 2024. However, this is above the proportion of employees across the North West which has fallen from 25% to 17%, and nationally from 23% to 16%. There has been a fall in the proportion earning below the living wage across most of Lancashire but in over half of current districts or unitaries there remains at least one in five employees earning below the living wage. This includes Hyndburn, one of the only districts where the proportion has increased, along with Wyre, Blackpool, Burnley, Lancaster, Chorey, Blackburn, and West Lancashire despite strong falls in West Lancashire. South Ribble is the only district with a relatively low proportion of employees earning below the living wage, Preston in line with the regional average. Estimates for Rossendale and Ribble Valley are unavailable for 2024 but latest estimates for Rossendale report 28.0% of employees earning below the living wage in 2021 and 22.6% of employees in Ribble Valley in 2020.

Proportion of employees earnings below the living wage (2014 and 2024)



Source: Number and proportion of employee jobs with hourly pay below the living wage, ONS, 2025

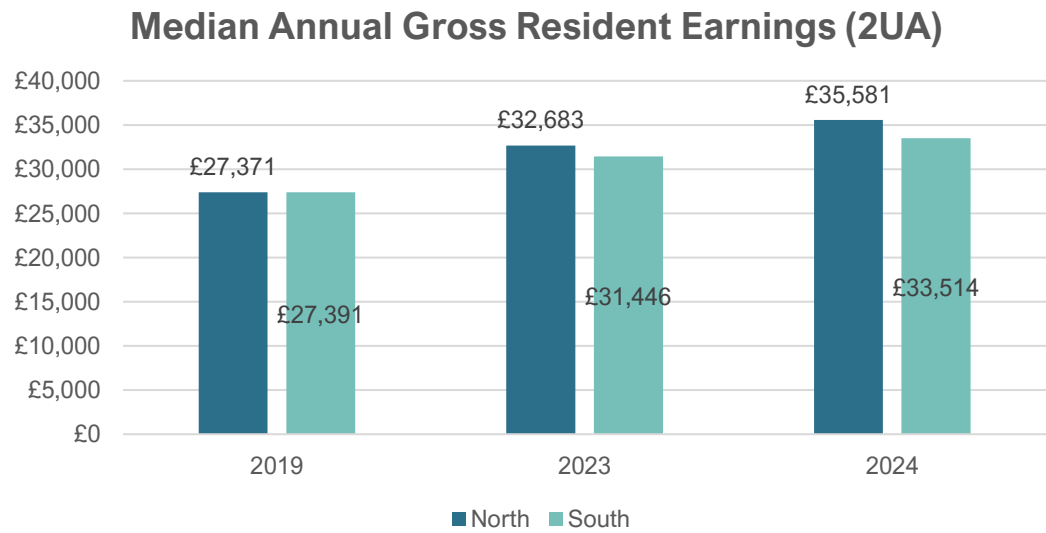
Earnings

In 2024, Lancashire (12 districts and 2 unitary) recorded a median annual earnings figure of £35,434, which is slightly higher than the North West average of £35,298. However, when compared to the national average for UK, which stood at £37,430, Lancashire still trails by nearly £2,000.



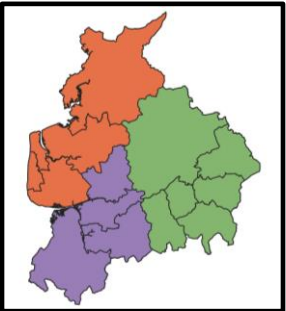
- Ribble Valley, Chorley, Fylde, South Ribble, and Wyre consistently had the highest earnings of current districts and unitaries of Lancashire. These districts show a clear upward trajectory, with Ribble Valley surpassing £40,000 in 2024.
- West Lancashire, Preston, Lancaster, and Rossendale have shown steady earnings growth over the period, though at a slightly slower pace than the highest earning districts. These districts hovered around the Lancashire average, with Preston and West Lancashire pushing into the higher bracket by 2024.
- Hyndburn, Burnley, Blackpool, Blackburn with Darwen, and Pendle have consistently remained below the Lancashire average.

Earnings – 2UA



- Annual gross resident earnings for the North rose from £27,371 to £35,581 between 2019 and 2024, an average rise of 5.4% a year. North in line with the regional average but below £37,430 national average.
- The South has seen slower growth of 4.1% a year since 2019 and therefore an earnings gap has started to emerge between the two authorities of £2,000, with earnings in the South growing from £27,391 to £33,514.
- North has seen relatively fast growth compared to 4.5% a year regional and national averages, slower growth in the South.
- Growth over the last year has also been faster in the North of 8.9% compared to 6.6% in the South, although this is in line with growth seen regionally and nationally of between 6.5%-7.0%.

Earnings – 3UA



Median Annual Gross Resident Earnings (3UA)

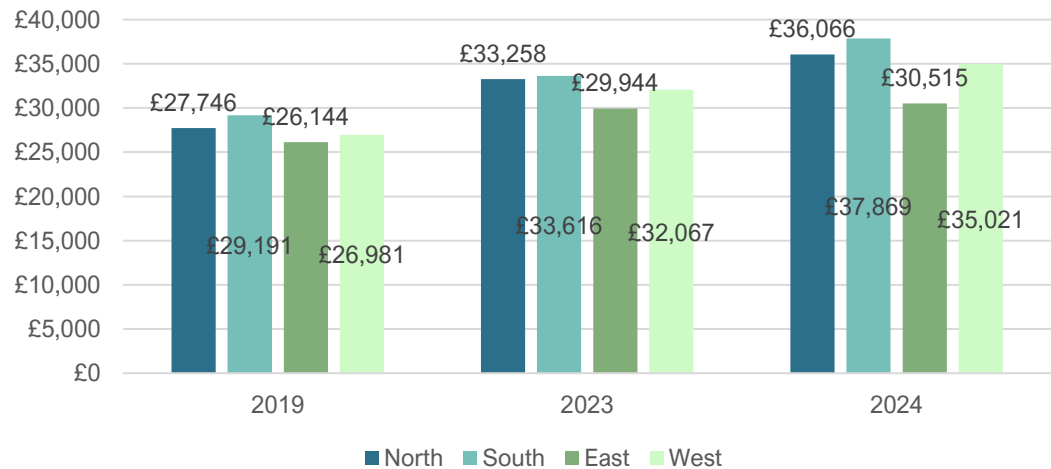


- Between 2019 and 2024 the South experienced the strongest growth of 5.8% a year, with median earnings rising from £28,262 to £37,475. South in line with UK median annual earnings.
- The North also saw strong growth in median earnings of 4.8% a year from £27,341 in 2019 to £34,588 in 2024. Both South and North have seen faster growth than regional and national averages of 4.5% a year. North just below regional average earnings.
- The East has seen the lowest annual growth of 2.5% a year and has the lowest earnings of the 3UA option – £26,645 in 2019 increasing to £31,637 in 2024. East over £3,500 below the regional average.
- Growth over the last year has varied from strong growth in the South (11.5%) and North (9.3%) to low growth in the East (2.4%).

Earnings – 4UA

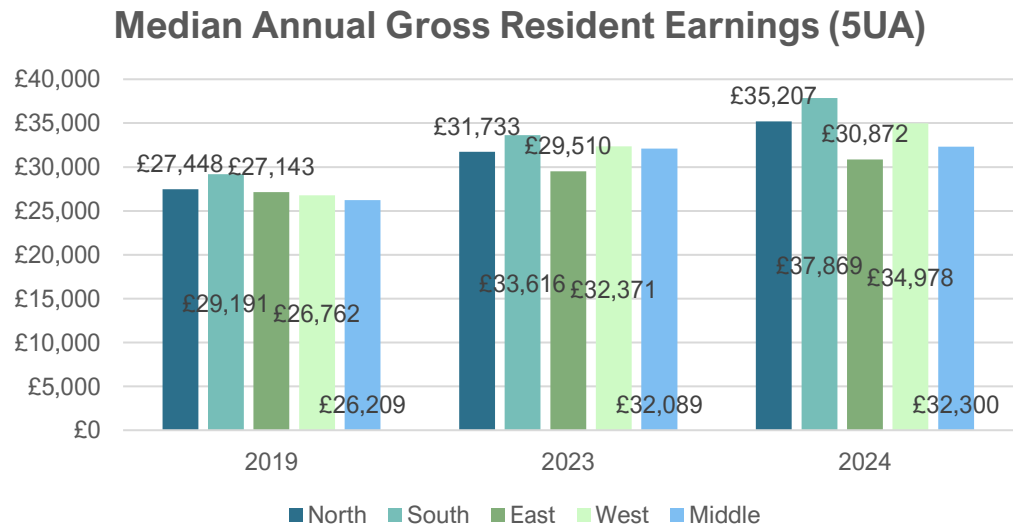


Median Annual Gross Resident Earnings (4UA)



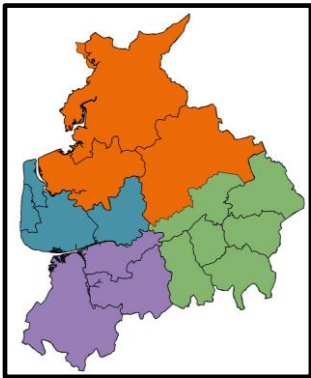
- South has the highest earnings with high growth of 5.3% a year since 2019 meaning earnings have risen from £29,191 to £37,869 – just above the national average. All other UAs are below the national average.
- West and North have seen strong growth of 5.4% a year since 2019, with earnings in the North rising from £27,746 to £36,066, above the regional average by around £700. Earnings in the West have risen from £26,981 to £35,081 roughly in line with the regional average.
- East has seen the lowest growth since 2019 of 3.1% a year, with an earnings gap opening up to other parts of Lancashire. Earnings have risen from £26,144 to £30,515 between 2019 and 2024, a gap of over £7,000 to the area with the highest median annual earnings of the North.
- Growth has varied significantly over the last year – South continues to see strong growth (12.7%) along with West (9.2%) and North (8.4%). East much lower growth of 1.9%.

Earnings – 5UA



- South has the highest earnings with high growth of 5.3% a year since 2019 meaning earnings have risen from £29,191 to £37,869 – just above the national average. All other UAs are below the national average.
- North has next highest earnings and has also seen strong growth of 5.1% a year since 2019 from £27,448 to £35,207, in line with the regional average.
- West has seen the strongest growth in earnings of 5.4% a year since 2019 with earnings around £35,000 also roughly in line with the regional average.
- Then there is a gap to Middle where earnings have risen by 4.3% a year to £32,300, and East where earnings have risen most slowly by 2.6% a year since 2019 to £30,872, £7,000 below earnings in the South.
- Over the last year, earnings have risen strongly in the South (12.7%), North (10.9%) and West (8.1%). Much slower growth in Middle (0.7%) and East (4.6%).

Earnings – 4UA B



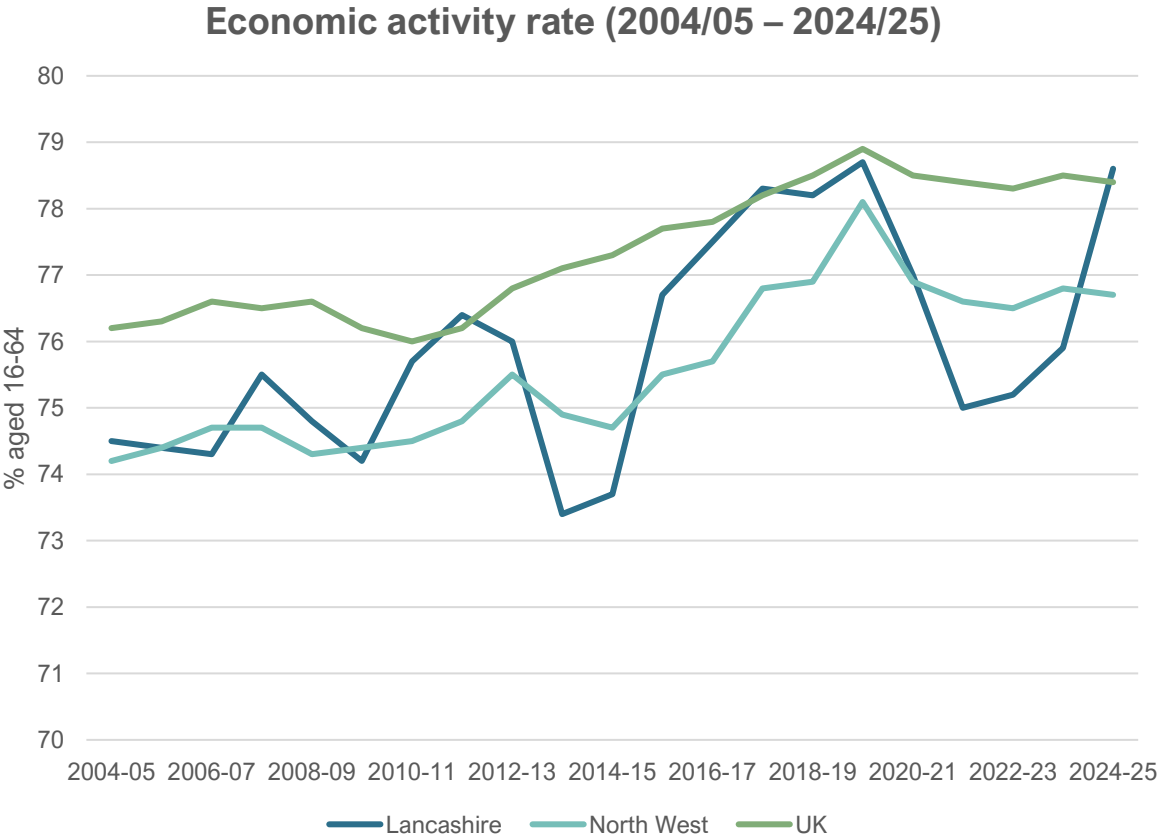
Median resident annual earnings (2024) (4UA B)



- To calculate estimates for earnings we have taken the proportion of population made up by each district/area of the UA it is in and then multiplied this by district earnings to get an estimate for each of the UAs.
 - For example, for the North UA: proportion of population of North UA x district earnings estimate in 2024
 - Lancaster: 71% x 33,565; Ribble Valley North: 10% x £40,458; Rural Wyre: 18% x £37,251 = £34,899
- Similarly to other models, South has the highest earnings, £2,500 higher than West.
- West has slightly higher earnings than North which counters what is seen in options 3 and 4.
- East has the lowest annual earnings, £6,500 lower than South.

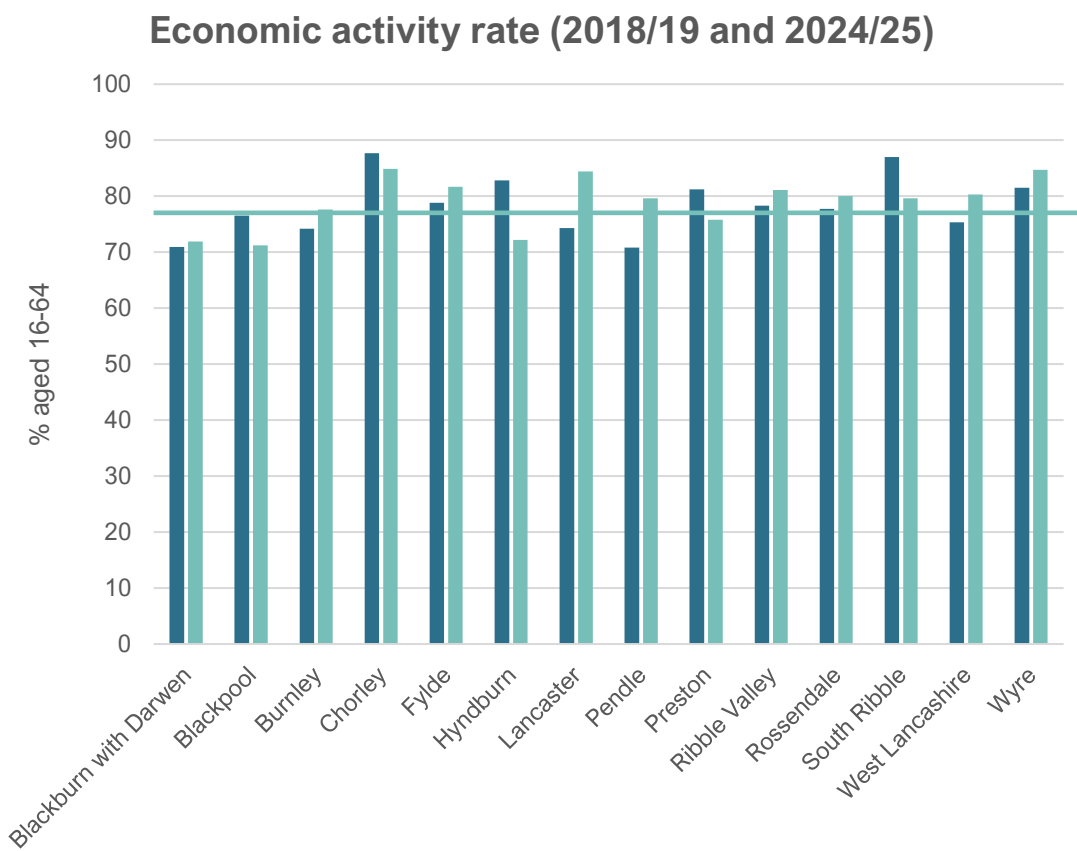
Source: Annual Survey of Hours and Earnings, ONS, 2025; Ward-level population estimates, ONS, 2024

Economic activity and change



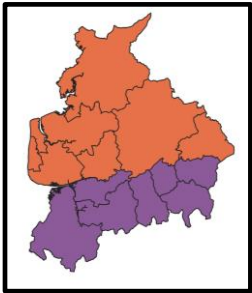
- Despite some fluctuations economic activity over the last 20 years, economic activity has risen in Lancashire from around 74% at a similar level to the regional average to 78.6% in 2024/25 following a steep rise since the pandemic, to a point in line with the national average and significantly above the regional average.
- This is a positive sign for labour market engagement in Lancashire.
- Although there is variation across the county – where economic activity is high in Chorley, Wyre, Lancaster, Fylde, Ribble Valley, Rossendale, and West Lancashire of at least 80%.
- Economic activity is lower in Blackburn, Blackpool, and Hyndburn at 71-72%. Inactivity is also below the regional average in Preston.

Economic activity and change

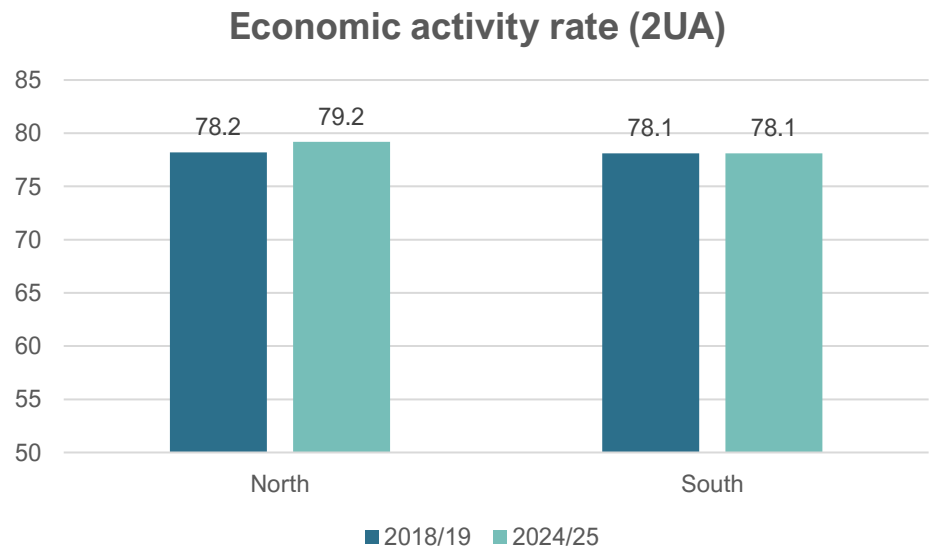


- The national average is displayed in the chart to the left to show where activity is higher in Lancashire.
- Economic activity is high in Chorley, Wyre, Lancaster, Fylde, Ribble Valley, Rossendale, West Lancashire of at least 80%.
- Economic activity is lower in Blackburn, Blackpool, Hyndburn at 71-72%. Inactivity is also below the regional average in Preston.

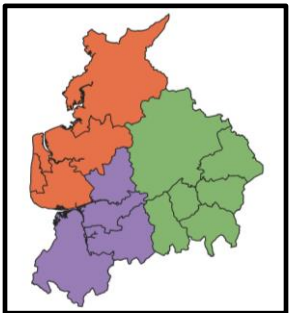
Economic activity – 2UA



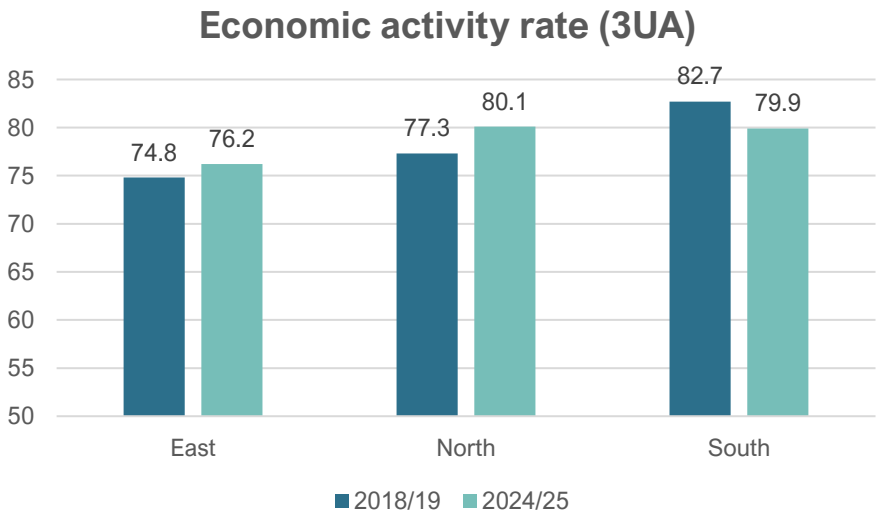
- Fairly even levels of economic activity although after a rise post pandemic in the North, levels are slightly higher than the South.
- Both at or above 78.4% national average.
- Only 1.1pp between UAs, the smallest difference between the UA with the highest and lowest economic activity rates.



Economic activity – 3UA



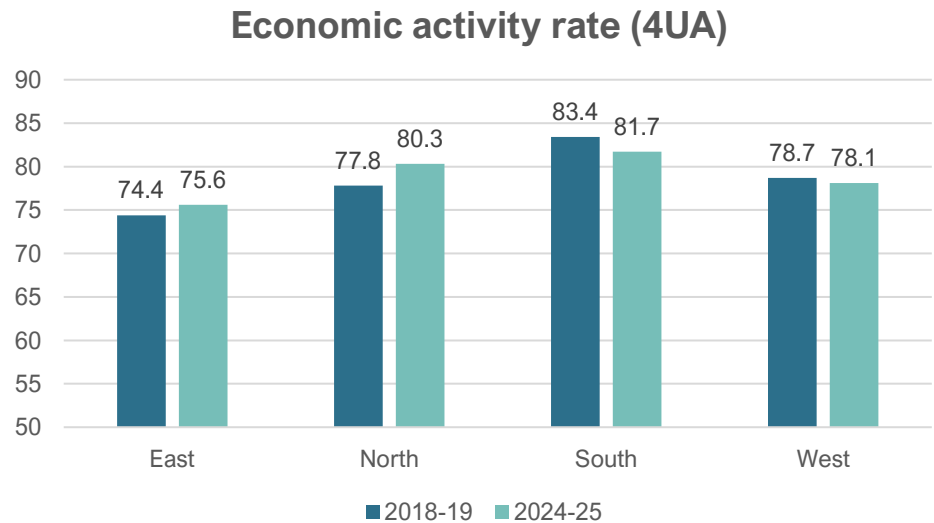
- North has seen a strong rise post pandemic and is now the area with the highest economic activity.
- South has seen a fall but also has levels above regional and national averages.
- Despite a rise East has relatively low activity rates.
- A difference of 4pp between the North with the highest and East with the lowest economic activity rates is amongst the lowest across options.



Economic activity – 4UA



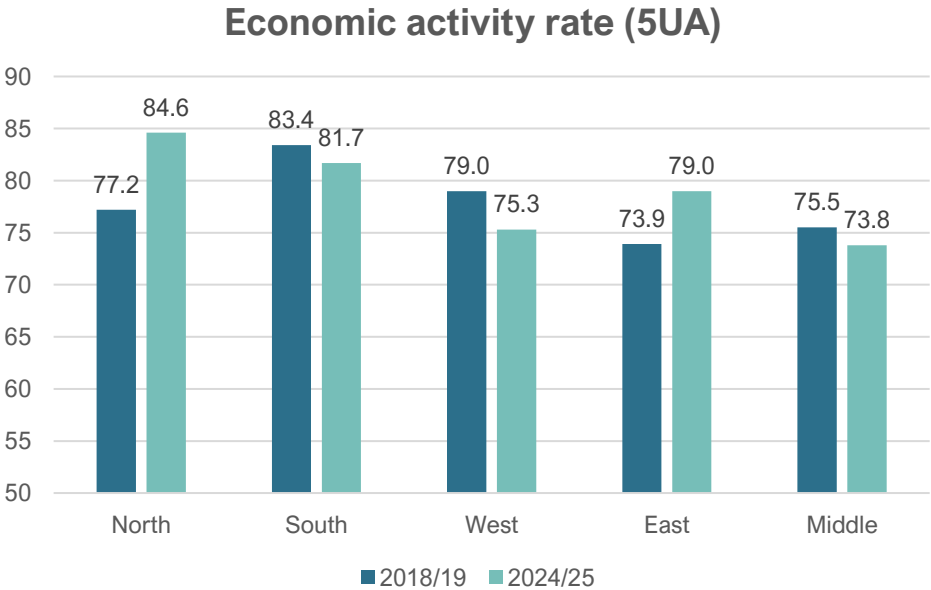
- South despite a fall remains UA with the highest economic activity rate – North and South have relatively high activity levels compared to regionally and nationally.
- West has seen a slight fall but remains in line with the UK average.
- East despite a slight rise remains has the lowest economic activity rate across the UAs.
- A difference of 6pp between the South with the highest economic activity and East with the lowest economic activity rate.



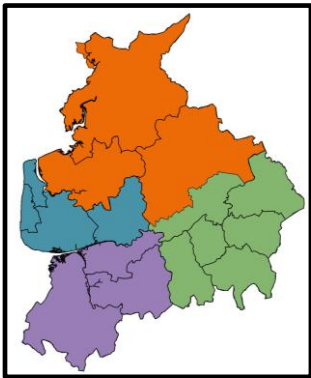
Economic activity – 5UA



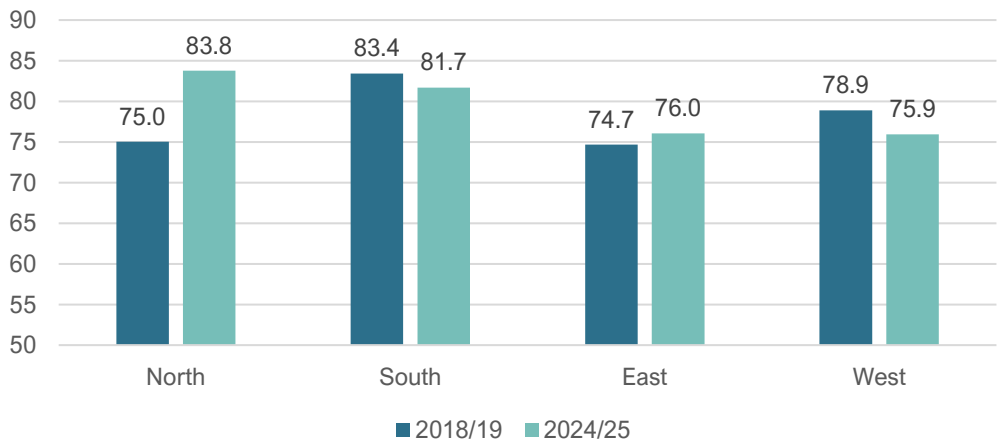
- North has highest activity with a strong rise post Pandemic.
- South despite a fall in economic activity levels remain high.
- A strong rise for East means North, South, and East all above the national average.
- West and Middle have seen falls and both have relatively low economic activity rates.
- North has the highest economic activity rate of any UA across options and Middle the lowest.
- The gap of 11pp between North and Middle is the biggest across options.



Economic activity – 4UA B



Economic activity rate (4UA B)

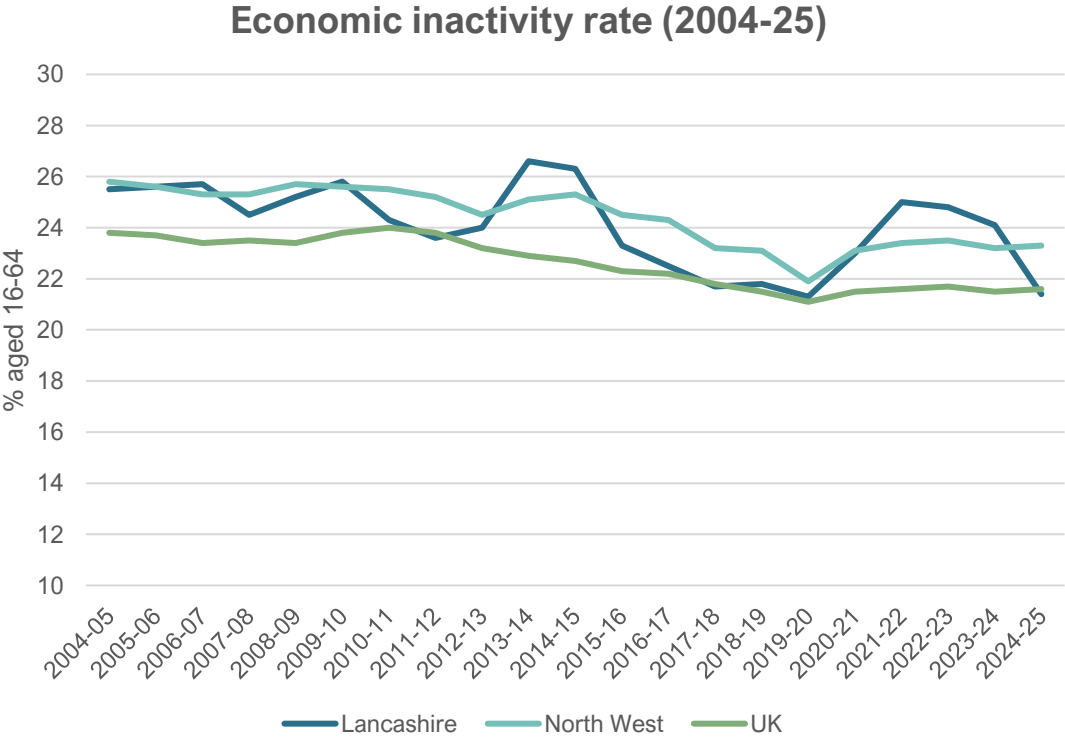


- LSOA/ward level data are available for employment/economic activity from the latest Census however this was collected during 2021 when Covid restrictions were still in place. A significant number of people were placed on the UK's furlough scheme or more likely to have been made redundant whilst restrictions impacted on business operations, therefore economic activity levels were low compared to historic levels.*
- As such we have approximated economic activity rates by taking the proportion of working age population made up in Ribble Valley North and Ribble Valley South of Ribble Valley; and of Urban and Rural Wyre of Wyre. Then we have used these approximations to estimate total count of those who are economically active and the total working age population, summed these to respective UAs and then divided the count of those who are economically active by the working age population.*
- South and North have the highest levels of economic activity, particularly the North, similarly to the 3 and 5 options.
- There is then a significant fall in economic activity to East and West where economic activity levels are around 76%.
- A gap of 8pp between economic activity rates in the North, and East and West is amongst the highest of options but below option 5.

Source: Annual Population Survey, ONS, 2025; Ward-level population estimates, ONS, 2024

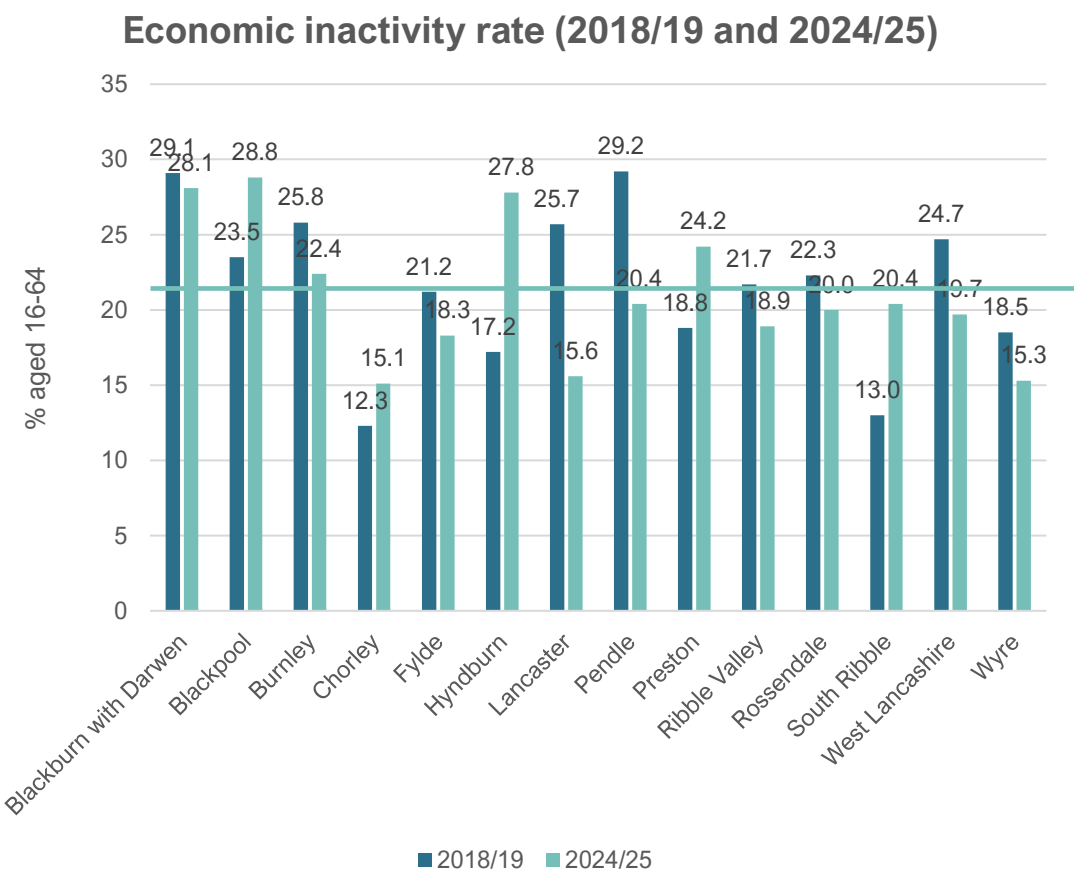
Economic inactivity and change

Economic inactivity refers to a situation where individuals of working age are not engaged in paid employment and are not actively seeking work. This group includes people who may be retired early, studying full-time, caring for family members, or dealing with long-term illness or disability. Unlike the unemployed, who are actively looking for work, economically inactive individuals are not participating in the labour market at all.



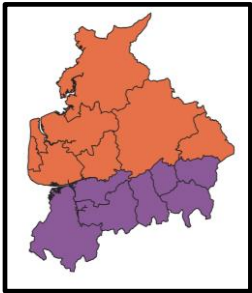
- Between 2004 and 2025, Lancashire’s (12 districts and 2 unitary) economic inactivity rate for those aged 16–64 declined from 25.5% to 21.4%, showing a general downward trend with some fluctuations. This trend broadly mirrors the regional pattern in the North West, which decreased from 25.8% to 23.3%, and the national trend across the UK, which fell from 23.8% to 21.6%. While Lancashire's rate was initially higher than the national average, it converged more closely with it in recent years, indicating relative improvement in labour market engagement.
- While Lancashire’s overall economic inactivity rate has declined over the last 20 years, several districts such as Blackburn with Darwen, Blackpool, and Hyndburn consistently recorded higher inactivity rates, indicating persistent barriers to labour market participation in those areas.
- In contrast, districts like South Ribble, Ribble Valley, and Chorley often maintained lower inactivity rates than the county average, suggesting stronger employment engagement and more resilient local labour markets.

Economic inactivity and change

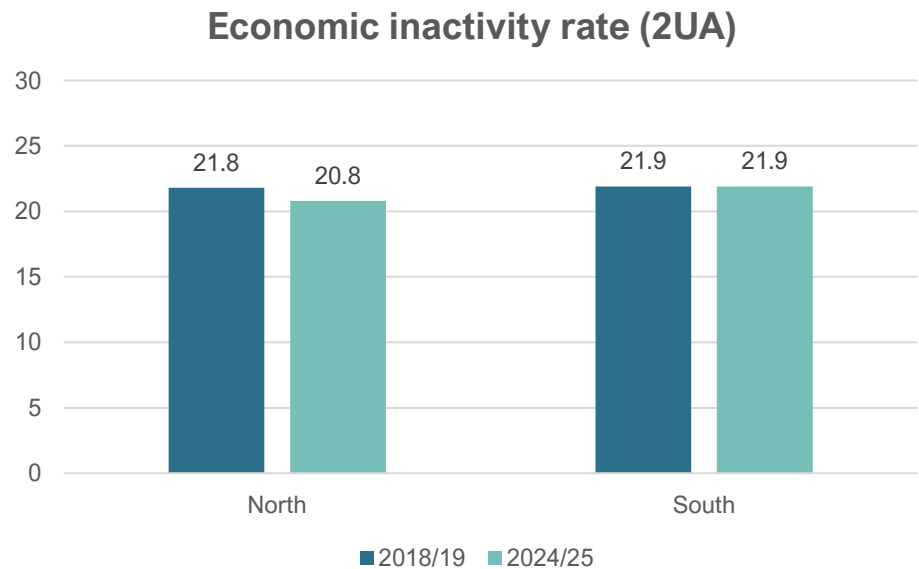


- The horizontal line in the chart to the left shows the national average to show where inactivity is relatively high in Lancashire.
- Economic inactivity is low in Chorley, Wyre, Lancaster, Fylde, Ribble Valley, Rossendale, and West Lancashire of 20% or below.
- Economic activity is high in Blackburn, Blackpool, and Hyndburn at 28-29%. Inactivity is also above the regional average in Preston.

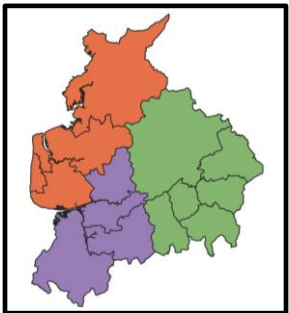
Economic inactivity – 2UA



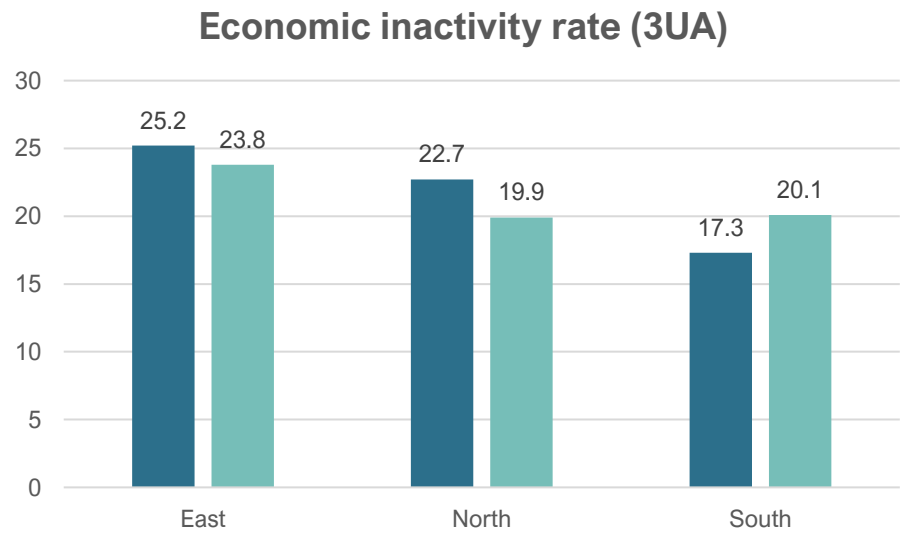
- Fairly even levels of economic inactivity although after a fall post pandemic in the North, levels are slightly lower than the South.
- Both at or below 21.6% national average.
- Only 1.1pp between UAs, the smallest difference between the UA with the lowest and highest levels of economic inactivity.



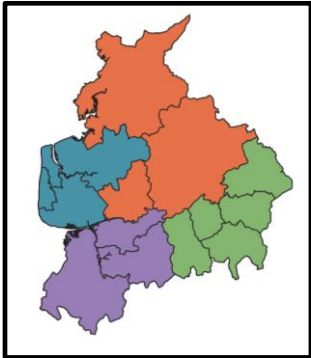
Economic inactivity – 3UA



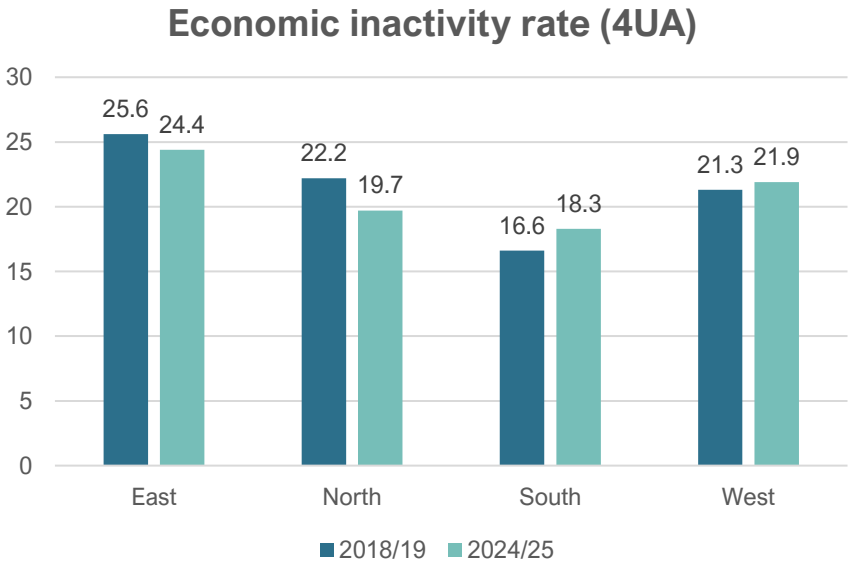
- North has seen a strong fall post pandemic and is now the area with the lowest economic inactivity.
- South has seen a rise but also has levels below regional and national averages.
- Despite a fall East has relatively high inactivity rates.
- A difference of 4pp between the North with the lowest and East with the highest economic inactivity rates is amongst the smallest difference across options.



Economic inactivity – 4UA



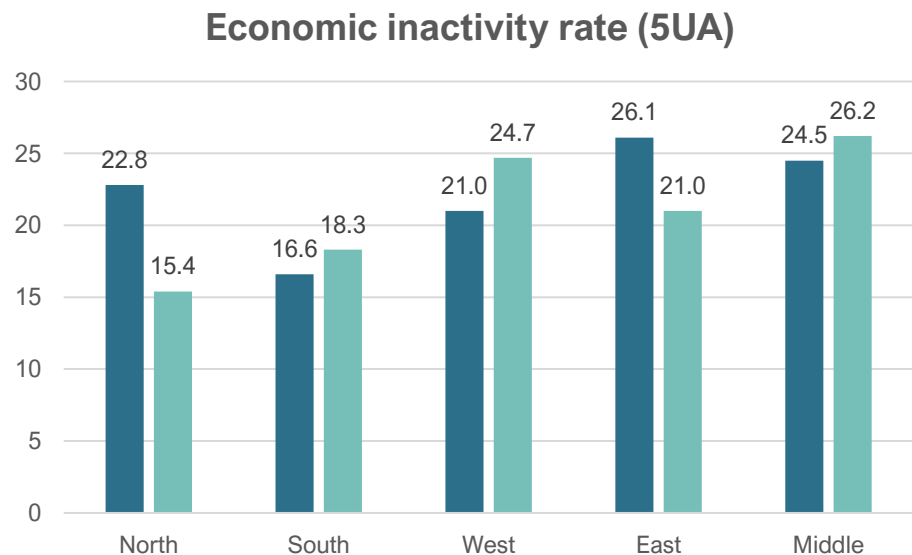
- South despite a rise remains the UA with the lowest economic inactivity – North and South low inactivity levels compared to regionally and nationally.
- West has seen a slight rise but remains in line with the UK average.
- East despite a slight fall remains highest across the UAs.
- A difference of 6pp between the South with the lowest economic activity and East with the highest economic inactivity rate.



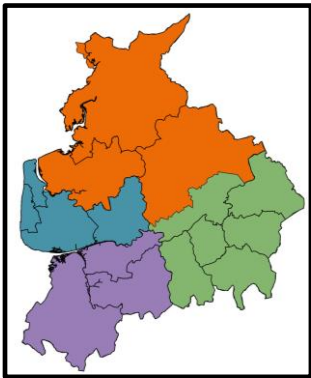
Economic inactivity – 5UA



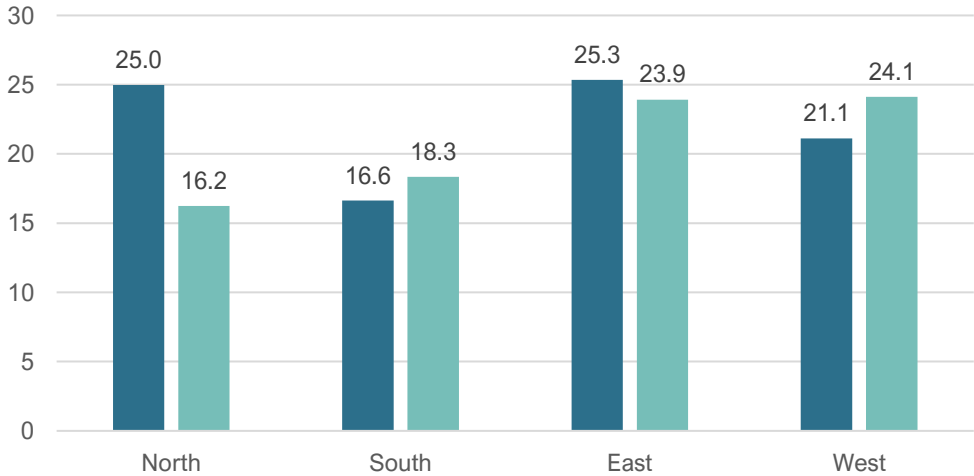
- North has lowest inactivity with a strong fall post Pandemic.
- South despite a rise in economic inactivity remains low compared to regionally and nationally.
- A strong fall for East means North, South, and East all below the national average.
- West and Middle have seen rises and both have relatively high economic inactivity rates.
- The gap of 11pp between North and Middle is the biggest across options.



Economic inactivity – 4UA B



Economic inactivity rate (4UA B)



LSOA/ward level data are available for employment/economic activity from the latest Census however this was collected during 2021 when Covid restrictions were still in place. A significant number of people were placed on the UK’s furlough scheme or more likely to have been made redundant whilst restrictions impacted on business operations, therefore economic activity levels were low compared to historic levels.

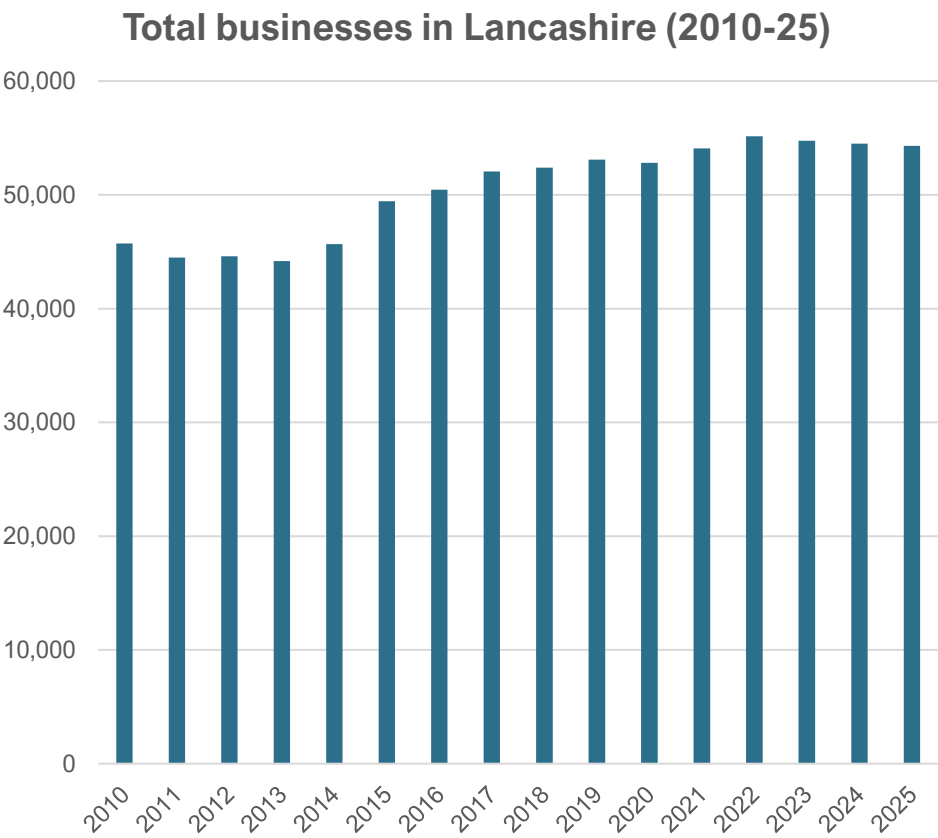
As such we have approximated economic inactivity rates by taking the proportion of working age population made up in Ribble Valley North and Ribble Valley South of Ribble Valley; and of Urban and Rural Wyre of Wyre. Then we have used these approximations to estimate total count of those who are economically inactive and the total working age population, and have then divided the count of those who are economically inactive by the working age population.

- South and North have the lowest levels of economic inactivity, particularly the North, similarly to the 3 and 5 options.
- There is then a significant rise in economic inactivity to East and West where economic activity levels are around 24%
- A gap of 8pp between economic activity rates in the North, and East and West is amongst the highest of options but below option 5.

Source: Annual Population Survey, ONS, 2025; Ward-level population estimates, ONS, 2024

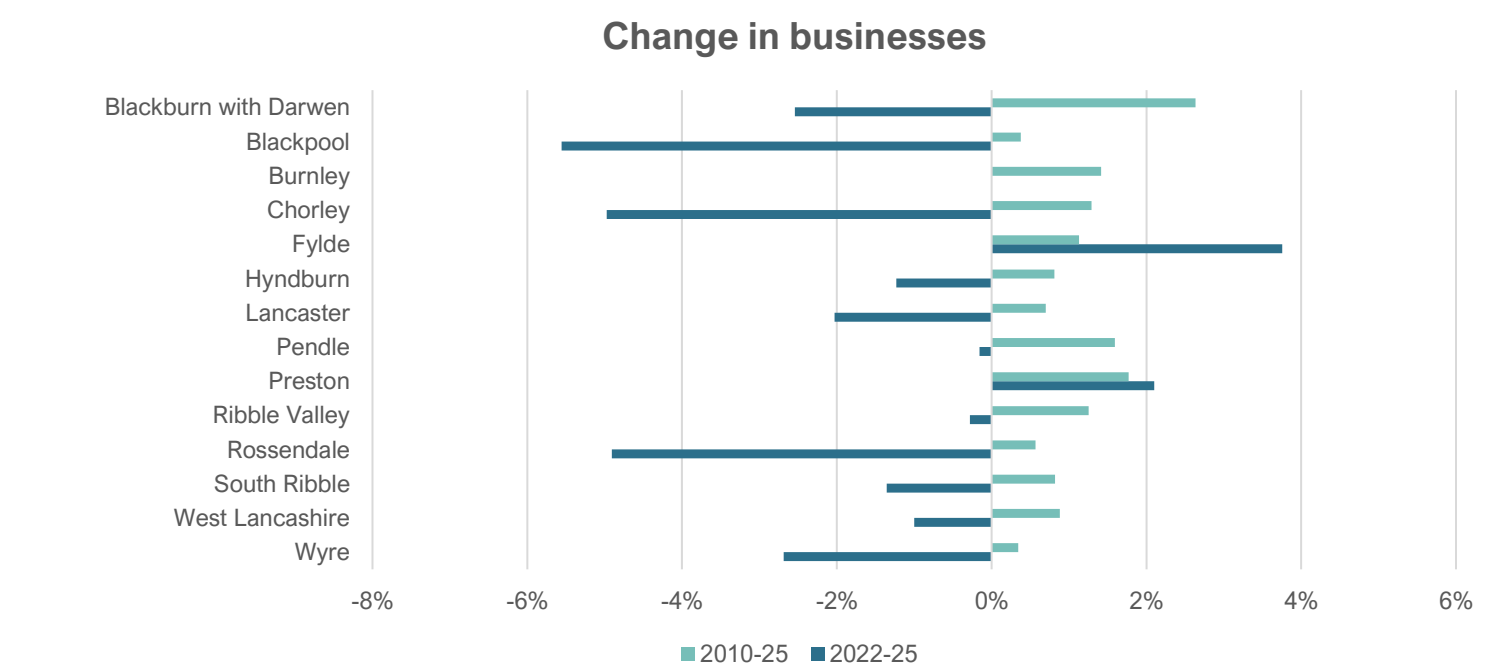
Total businesses – Lancashire

- The number of businesses in Lancashire (12 districts and 2 unitary) has grown from 45,735 in 2010 to 54,320 in 2025, average growth of 1.2% a year, below the 1.7%-1.8% growth seen regionally and nationally.
- Business numbers fell between 2010 and 2013 in Lancashire, countering regional and national trends where business numbers picked up after 2011.
- Business numbers generally continued to rise in Lancashire up to 2022 except for a slight decline during the Pandemic – again this slightly varies to regionally and nationally especially, where business numbers across the UK rose by 1.2% between 2019 and 2020.
- Business numbers peaked in 2022 at 55,160, falling by -1.5% to 2025, although this is below the -2.0% fall seen regionally.
- Business base has continued to decline over the last year by -0.3% across Lancashire. Regionally a -0.1% decline whereas nationally a slight pick-up by 0.4%.



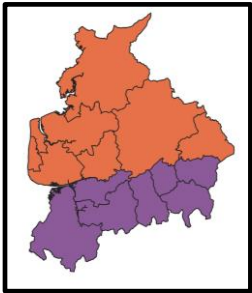
Business growth – Lancashire districts

Wide variation in business growth across Lancashire. Blackburn has seen strong annual growth of 2.6% a year between 2010-25, by far the highest growth of all districts. Preston and Pendle have seen growth in line with regional and national growth. Half of Lancashire’s current districts and unitaries have seen growth of less than 1% a year since 2010. Except for Fylde, Preston, and Burnley all other areas have seen a decline in business numbers between 2022 and 2025 – Blackpool, Chorley, and Rossendale have seen declines of 5%; Wyre and Blackburn (despite strong long-run growth) around 2.5% declines, above falls seen regionally and nationally. Although Fylde and Preston have seen a rise in business numbers between 2022-25, countering trends seen regionally and nationally (Burnley no change).

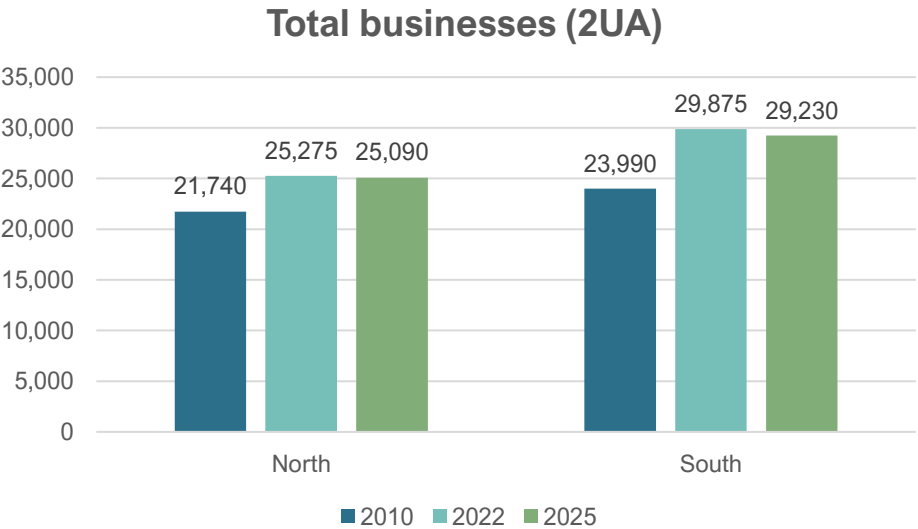


Area	2010	2025
Blackburn with Darwen	3,760	5,555
Blackpool	3,455	3,655
Burnley	2,150	2,655
Chorley	3,705	4,490
Fylde	2,920	3,455
Hyndburn	2,130	2,405
Lancaster	4,130	4,585
Pendle	2,485	3,150
Preston	4,480	5,830
Ribble Valley	2,970	3,580
Rossendale	2,315	2,520
South Ribble	3,540	4,000
West Lancashire	3,905	4,455
Wyre	3,785	3,985

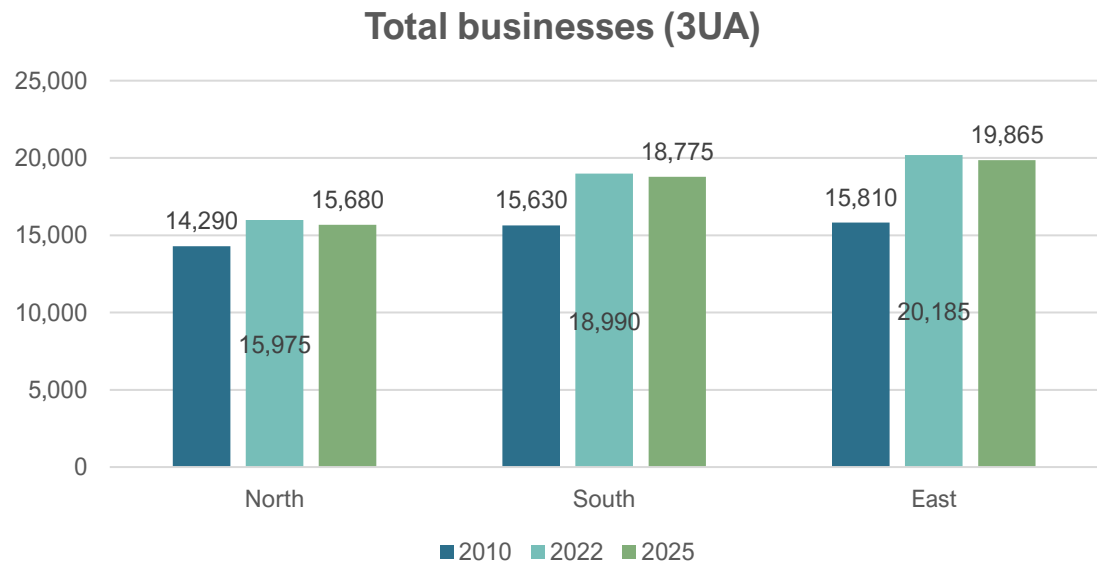
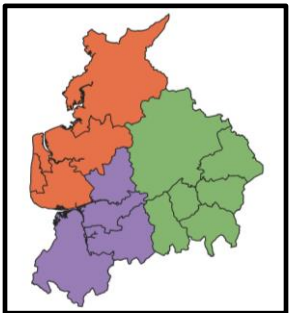
Business growth – 2UA



- Fairly even spilt between businesses – 54% in South and 46% in North.
- South has seen faster growth of 1.3% a year between 2010-25 compared to 1.0% in the North.
- Although South has seen a fall of -2.2% over the last three years compared to a slight fall of -0.7% in the North.
- North has seen a sharper fall of -0.5% over the last year compared to -0.2% in South.

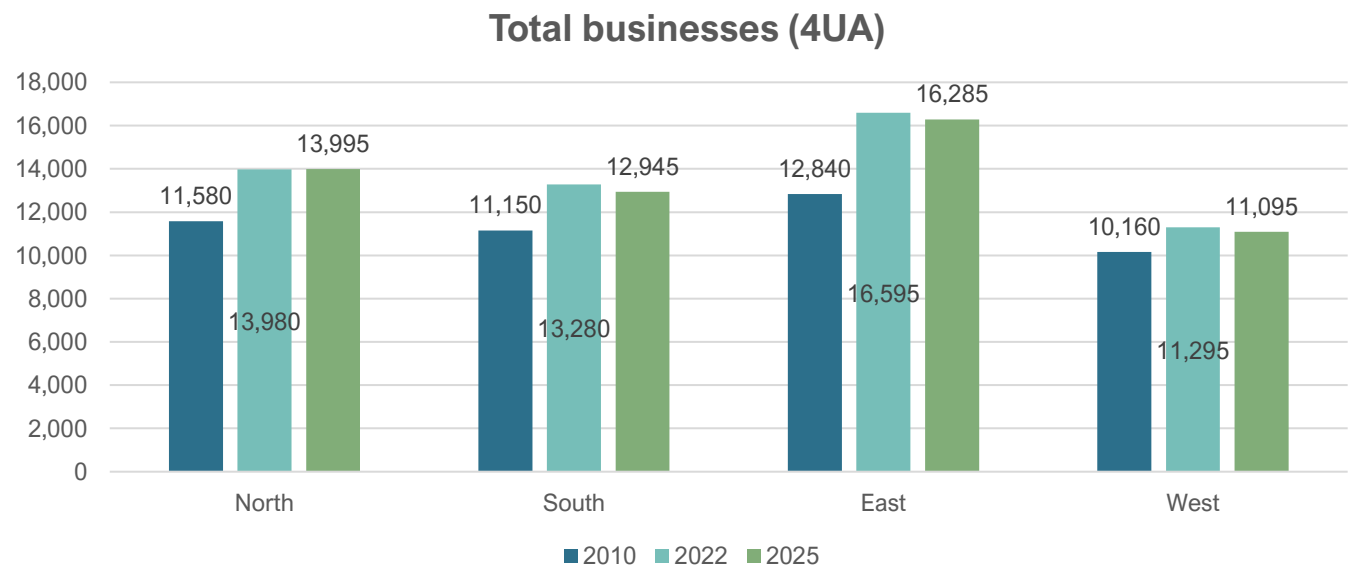


Business growth – 3UA



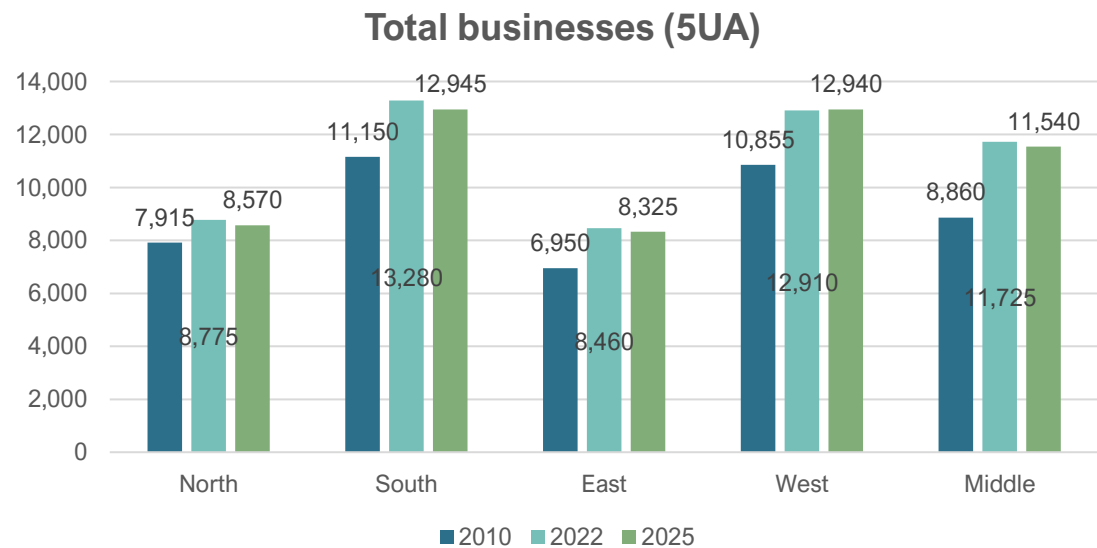
- Fairly even split with the three authorities making up around a third of businesses – East 37%, South 35% and North 29%.
- Fastest growth in East of 1.5% a year, followed by 1.2% in South and 0.6% in North between 2010-25.
- North has seen a decline of -1.8% a year between 2022-25, East a decline of -1.6% and South a decline of -1.1%.
- North has continued to see a decline in the business base of -1.6% over the last year, East and South slight rises of 0.3% and 0.1% respectively.

Business growth – 4UA



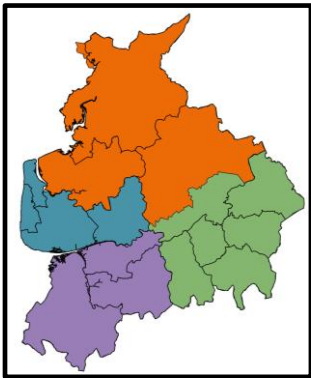
- East has highest number of businesses (30% of total businesses), North and South around a quarter of businesses, and 20% in West UA.
- Fastest growth in East of 1.6%, followed by 1.3% in North, 1.0% South, and 0.6% in West between 2010-25.
- Strong falls in South of -2.5%, -1.9% in East and -1.8% in West between 2022-25, whereas North little change in the business base.
- Ove the last year, the business base has continued to decline by at least -1% in West and South. Whereas East has seen a rise of 0.5% and North of 0.3%.

Business growth – 5UA

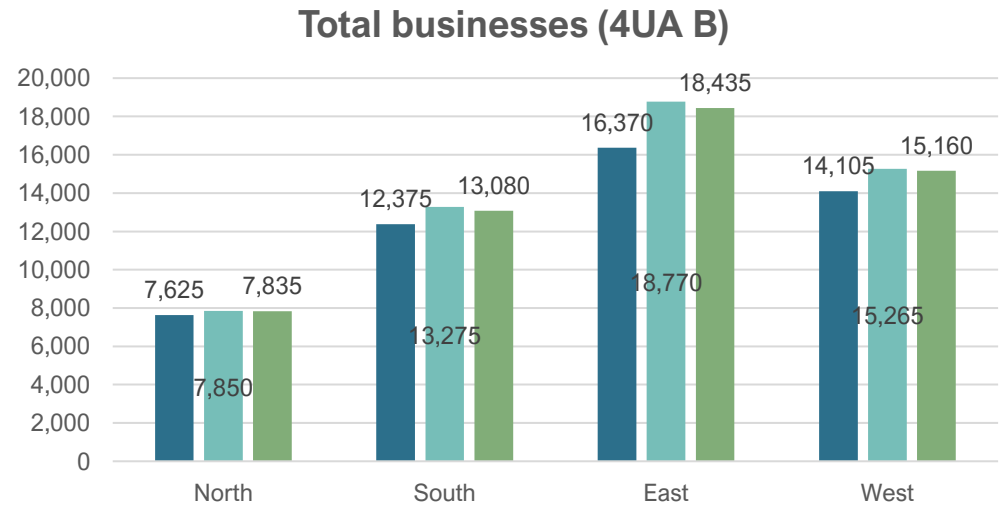


- South and West both account for around a quarter of businesses, Middle around a fifth of total businesses, and East and North between 15-16% of businesses.
- Middle seen fastest long-run growth of 1.8% a year between 2010 and 2025 with the slowest growth of 0.5% in the North.
 - 1.2% growth in West and East UAs
 - 1.0% growth in South
- West counters recent trends and has not seen a decline in the business base since 2022. All other UAs have seen falls, with the sharpest being in South (-2.5%) followed by North (-2.3%) and -1.6% in Middle and East Lancashire.
- Over the last year, the business base has continued to decline by at least -1% in the North and South. West and East have seen little change whereas Middle has seen a 0.5% rise in businesses.
- The difference in proportion of total businesses between South and West with the highest number of businesses, and East with the lowest, is almost 10pp.

Business growth – 4UA B



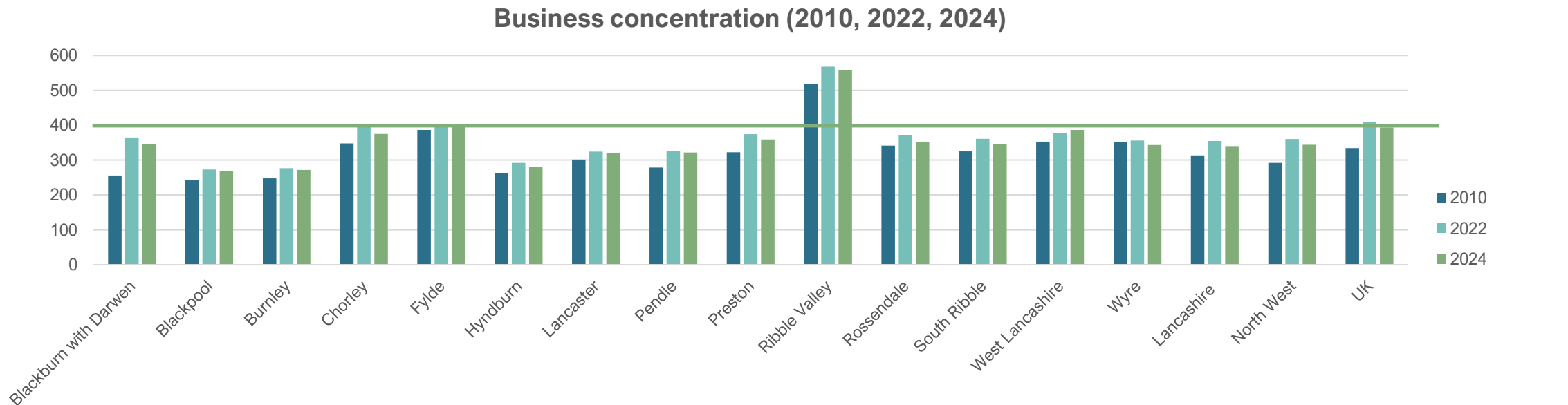
- East accounts for a third of total businesses and West 28% – combined East and West account for around two thirds of total businesses.
- South accounts for another quarter of total businesses. North accounts for 14% of total businesses – significant variation of 20pp between East and North’s contribution of total businesses.
- Between 2016 and 2024, across Lancashire the business base has grown by 1.0% a year and all UAs have seen growth over this period.
 - East Lancashire is the only UA to have seen growth above 1% annually.
 - North (0.3%), South (0.7%) and West (0.9%) growth in the business base has been slower.
- Since 2022 all UAs have seen a decline in the business base. The fall of -0.2% in North has been more subdued.
- East and South have seen at fall of at least -1.5% between 2022 and 2024.



Notes: earliest data available at an MSOA level is 2016 so we have calculated growth rates between 2016 and 2025
Source: Business Counts, ONS, 2025

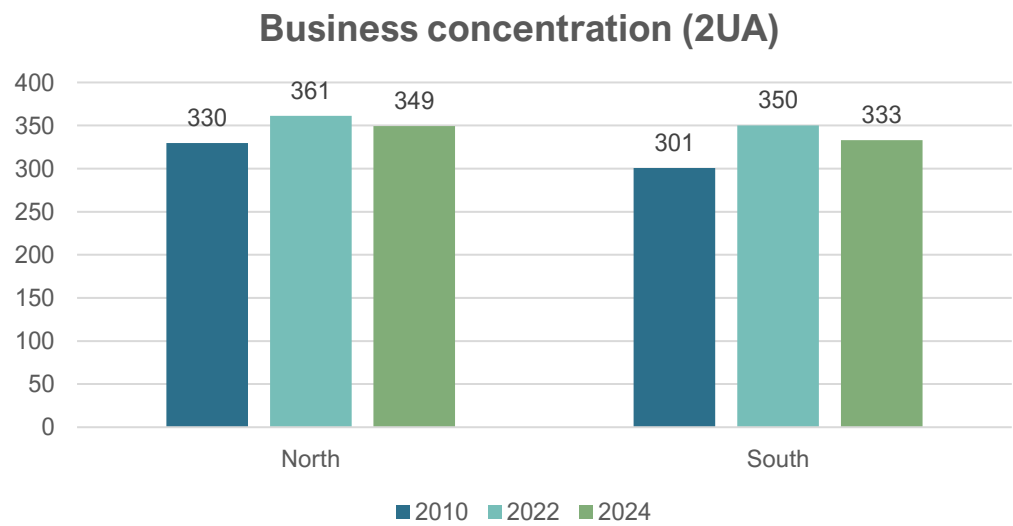
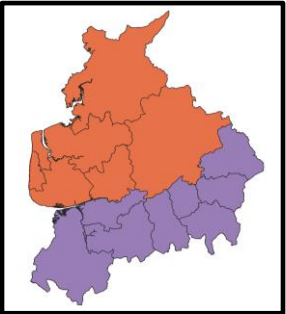
Business concentration (businesses per 10,000 population)

This slide shows the number of businesses per 10,000 people. Across Lancashire there has been an increase in business concentration from 314 to 355 in 2022 before declining to 340 in 2024. Business concentration has remained below UK levels, with the gap widening between 2010 to 2024 from 21 to 53 businesses per 10,000 population. Also, over this period, business concentration in Lancashire has gone from 22 businesses above the regional average in 2010 to being in line with the North West average in 2024. Only Ribble Valley and Fylde have a business concentration higher or in line with the national average, although most areas have a business concentration higher or in line with the regional average except Blackpool, Burnley, and Hyndburn. Chorley, Blackburn, and Rossendale have seen a sharper decline in business concentration than the regional average.



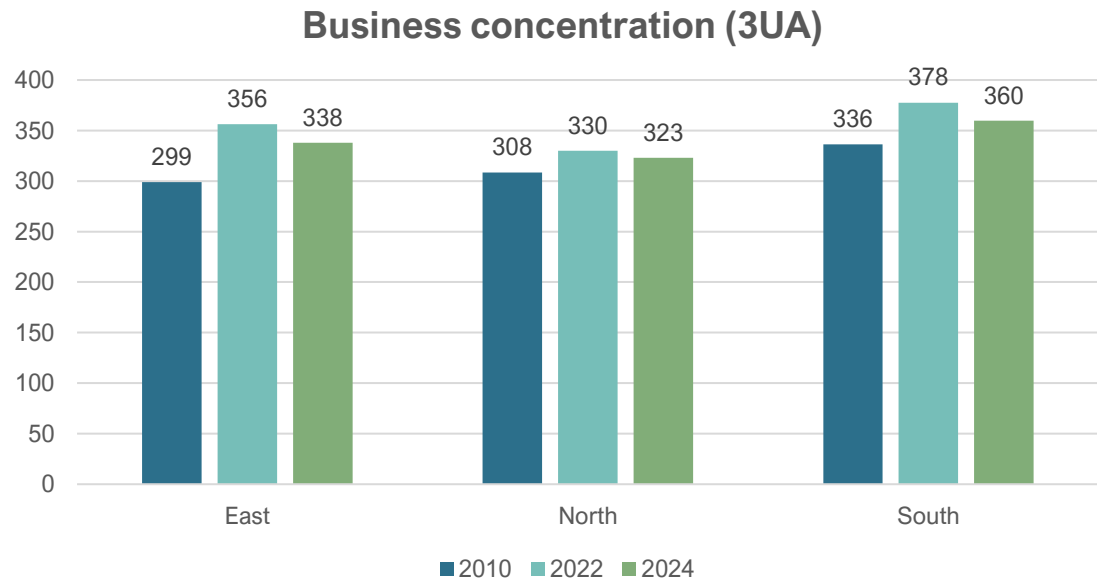
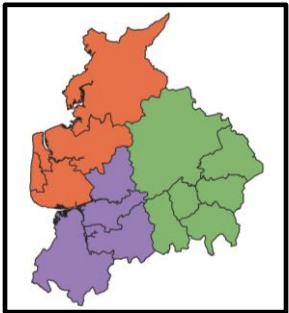
Source: Business Counts, ONS, 2025; Population estimates – local authority based by single year of age, ONS, 2025

Business concentration – 2UA



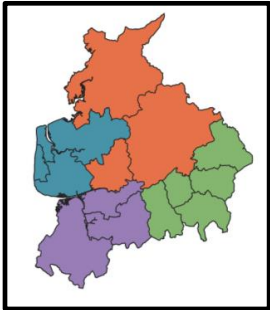
- Business concentration has risen strongly in South between 2010 and 2024, outpacing business growth seen in the North, although the South has seen a steeper decline in business concentration over the last two years.
- Business concentration has risen more in the South, closing the gap slightly from 29 businesses per 10,000 businesses in 2010 down to 11 businesses in 2022 before a slight widening to 16 businesses in 2024.
- North in line with the regional average of 344 businesses per 100,000 population, South slightly below the regional average but both at least 40 businesses per 10,000 population below the national average.

Business concentration – 3UA

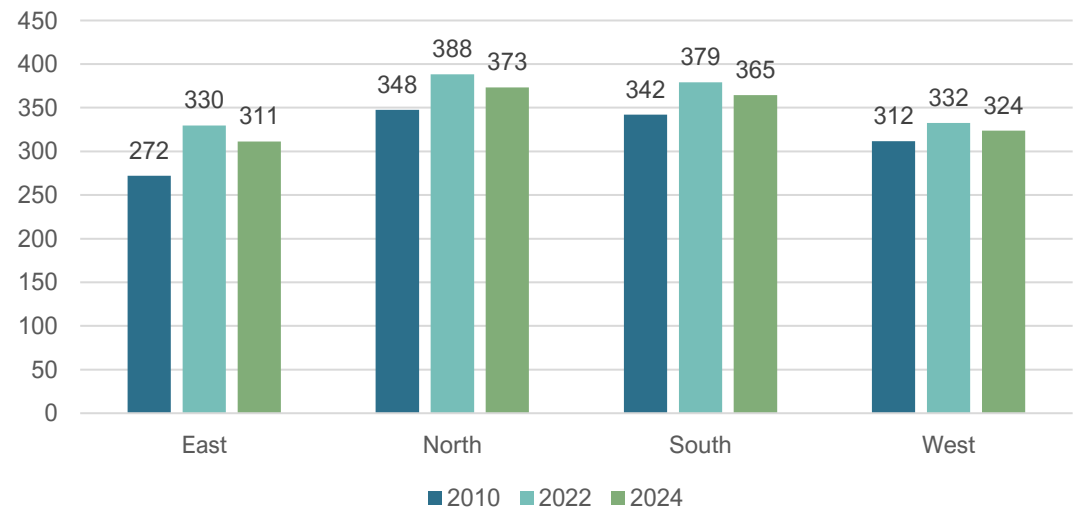


- South continues to have the highest business concentration rising from 336 businesses per 10,000 population to 378 in 2022 before a decline over the last two years but remaining above regional business concentration.
- East has seen a strong increase in business concentration overtaking business concentration in the North – East has seen the fastest growth in total businesses helping to explain why the increase in business concentration has been strong, although there was a steep decline of -1.9% in the number of businesses between 2022 and 2024.
- North has seen the slowest increase in business concentration and is below the regional business concentration of 344 businesses per 10,000 population.

Business concentration – 4UA



Business concentration (4UA)

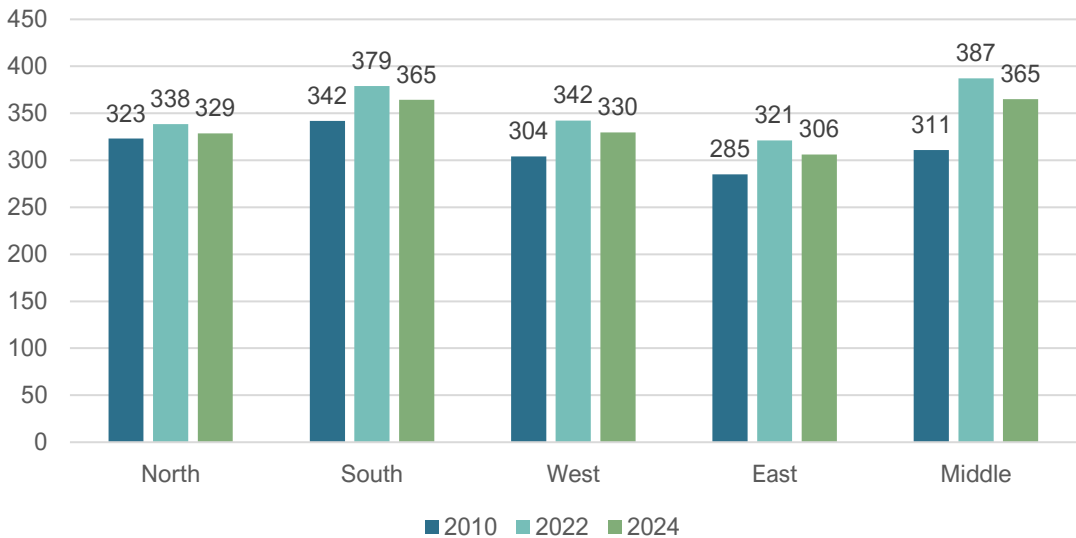


- North and South have the highest business concentration – remaining the case between 2010 and 2024. Both authorities have a higher business concentration than the regional average.
- East has seen the fastest growth in businesses across the proposed four authorities, with a steep rise in business concentration. Although a sharp decline in businesses in 2022-24 of -2.4% has lowered business concentration and remains below the regional average – East has closed the gap in business concentration to the other proposed authorities.
- West has seen the smallest increase in businesses and therefore business concentration has seen the lowest rise of the four proposed authorities and is below the regional average.

Business concentration – 5UA



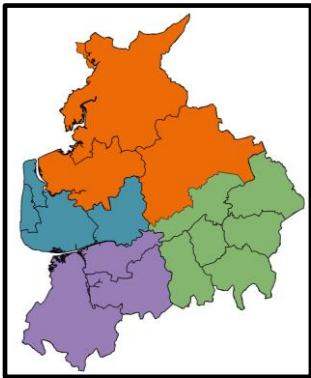
Business concentration (5UA)



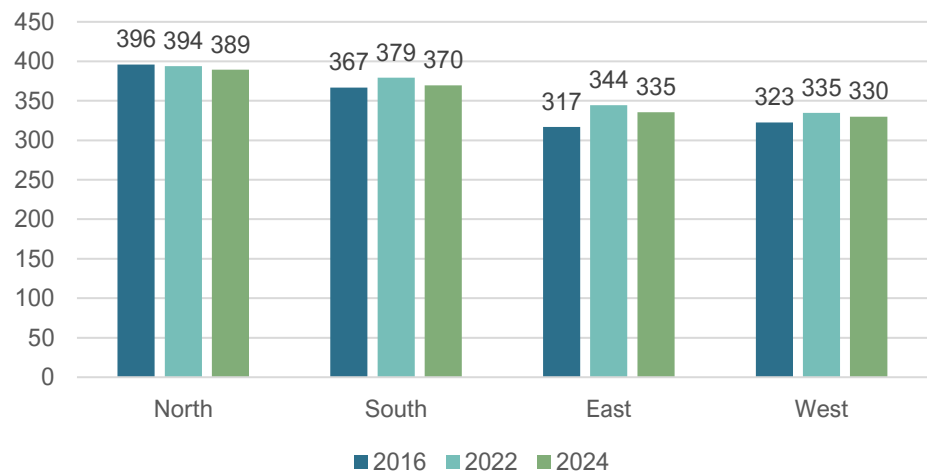
- Middle and South have the highest business concentration. Middle has seen the fastest rise in businesses which can be seen with the sharpest rise in business concentration up to 2022 before a sharp decline in businesses of -2.1% over the last two years has lowered business concentration back to levels seen in the South. Both Middle and South Lancashire have higher business concentration than the 344 businesses per 10,000 population regionally.
- North has seen the lowest growth in businesses between 2010-24, with West now matching business concentration in North Lancashire. Both are slightly below regional levels.
- East has seen some growth but business concentration is well below the regional average.

Source: Business Counts, ONS, 2025; Population estimates – local authority based by single year of age, ONS, 2025

Business concentration – 4UA B



Business concentration (4UA B)



- North has consistently had the highest number of businesses per 10,000 population but given relatively slow growth in the business base since 2016, business concentration has fallen somewhat between 2016 and 2024.
- South continues to have the next highest business concentration with an increase between 2016-22 before a decline in the business base has seen business concentration return to levels seen in 2016, although remaining well above business concentration in East and West UAs.
- East started with the lowest business concentration but with stronger growth in the business base than any of the other UAs has overtaken the West in terms of business concentration despite a sharp fall between 2022 and 2024.

Notes: earliest data available at an MSOA level is 2016 so we have calculated concentration between 2016 and 2024. 2023 and 2024 estimates use projections of 2022 population data based on historical population growth trends
Source: Business Counts, ONS, 2025; Ward-level population estimates, ONS, 2024

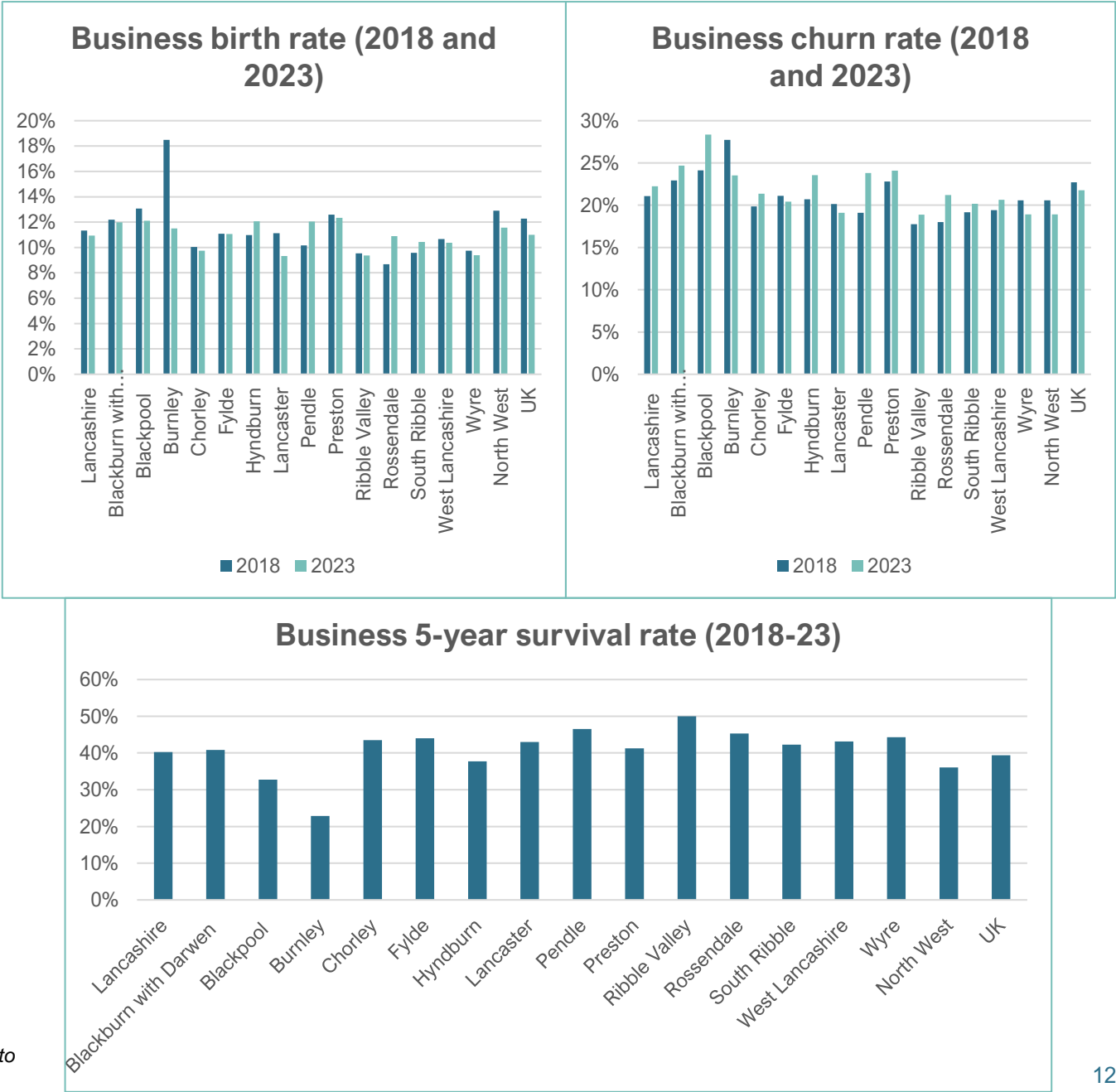
Business demography

Business birth rate has declined by 0.4 percentage points in Lancashire to 10.9%, a smaller decline than regionally and nationally but the business birth rate remains below 11.6% regionally. Business birth rate has declined in most areas particularly in Burnley and Lancaster. Preston is the exception which has seen a strong rise in business start-ups.

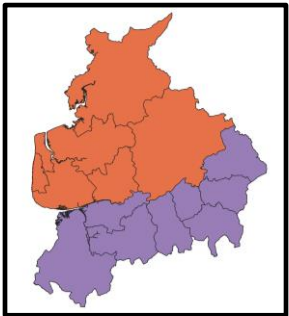
Business churn rate has risen slightly, largely due to a rise in businesses closing in Lancashire particularly in Blackpool, Preston, and South Ribble. Business churn, which assess business dynamism, is above the regional average and in line with the national average, highest in Blackpool largely explained by a high business death rate, as well as a high churn rate in Blackburn, Preston, Pendle, Hyndburn, and Burnley. But largely business churn has risen because of an increase in businesses closing, with a higher business death rate than birth rate indicating more businesses are closing than opening in 2023.

Business survival is high in Lancashire – the 5-year business survival rate is 40.3% compared to 36% regionally. It is particularly high in Ribble Valley, Pendle, and Rossendale. However, business survival is particularly low in Burnley with less than one in four businesses surviving their first five years of opeartion, and is also low in Blackpool.

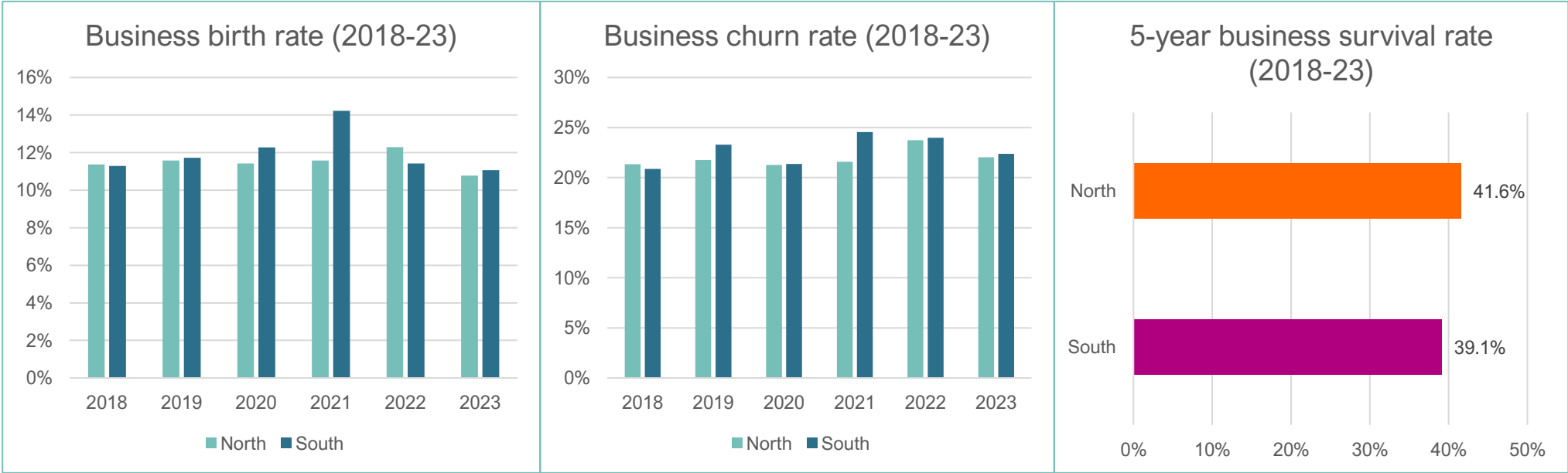
Notes: The number of active enterprises is used as the denominator to calculate birth and churn rates. The 5-year survival rate is the percentage of businesses starting in 2018 which continues to operate in 2023.
Source: Business Demography, ONS, 2024



Business demography – 2UA

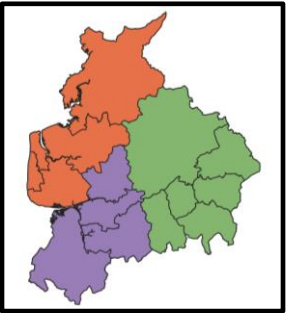


- Business birth rate at around 11% for both authorities – both have seen a drop since 2021 particularly in the South.
- Churn rate also very similar for the 2UAs at around 22% – death rate is slightly higher than birth rate in both so there has been a slight decline in business numbers. The fall in churn rate is down to a fall in business birth rate particularly in the South.
- Business survival higher in North although South still has a higher survival rate than regional average of 36%.

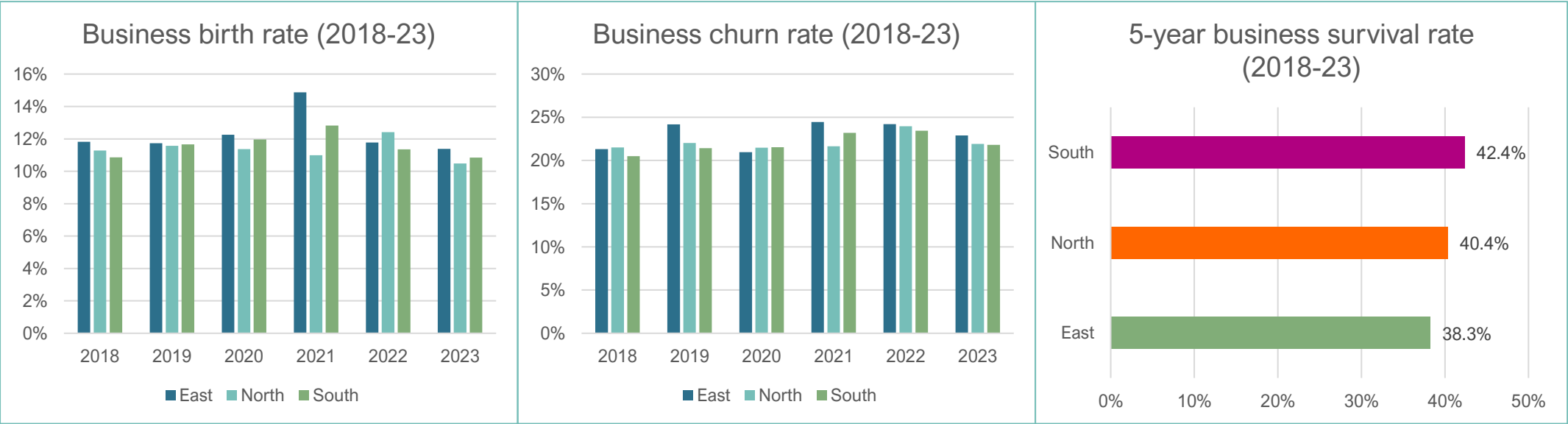


Source: Business Demography, ONS, 2024

Business demography – 3UA

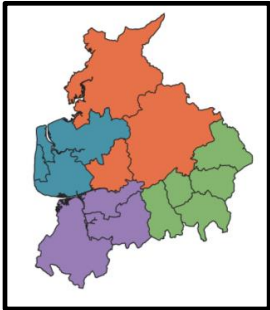


- Business birth rate around 11% for the three proposed authorities – all authorities seen a drop since 2021 particularly in the East.
- Churn rate similar at between 22%-23%. Death rate higher than birth rate for all authorities particularly in the North so there has been a slight decline in business numbers across all authorities
- Business survival higher in South although North and East still has a higher survival rate than regional average of 36%.

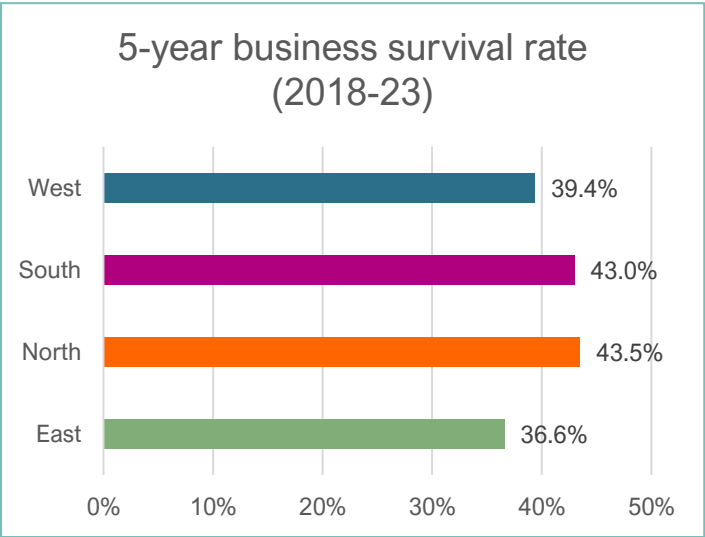
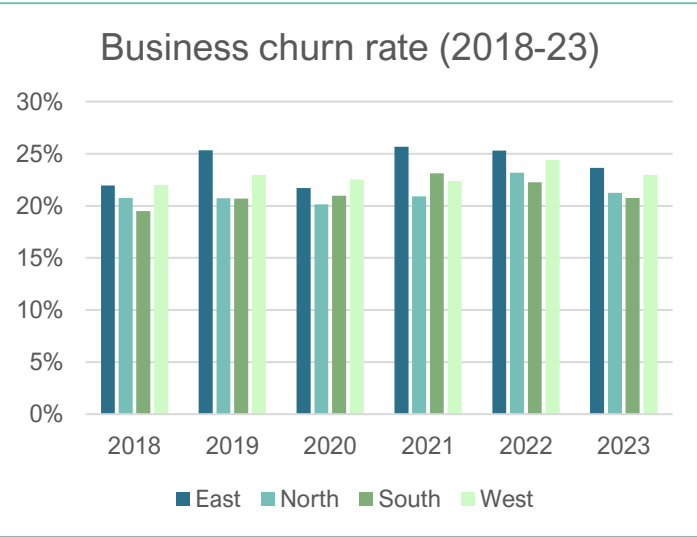
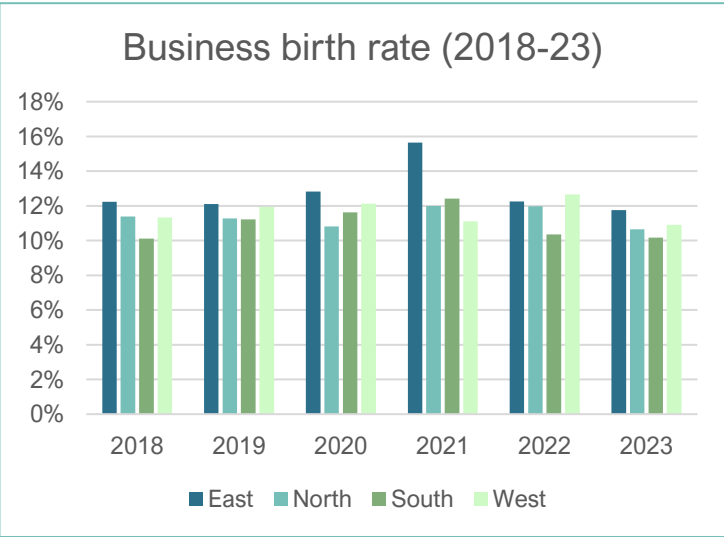


Source: Business Demography, ONS, 2024

Business demography – 4UA



- Business birth rate highest in East at 12% and lowest in South at 10%. All have seen a drop since 2021 particularly in the East.
- Churn rate highest in East and West at around 24%, around 21% in South and North. Business death rate higher than birth rate in West particularly as well as South and East. Business birth rate slightly higher in North so only area where business numbers are increasing.
- Business survival high in North and South at 43%, West also has a higher business survival rate than the regional average of 36%. East in line with the regional average

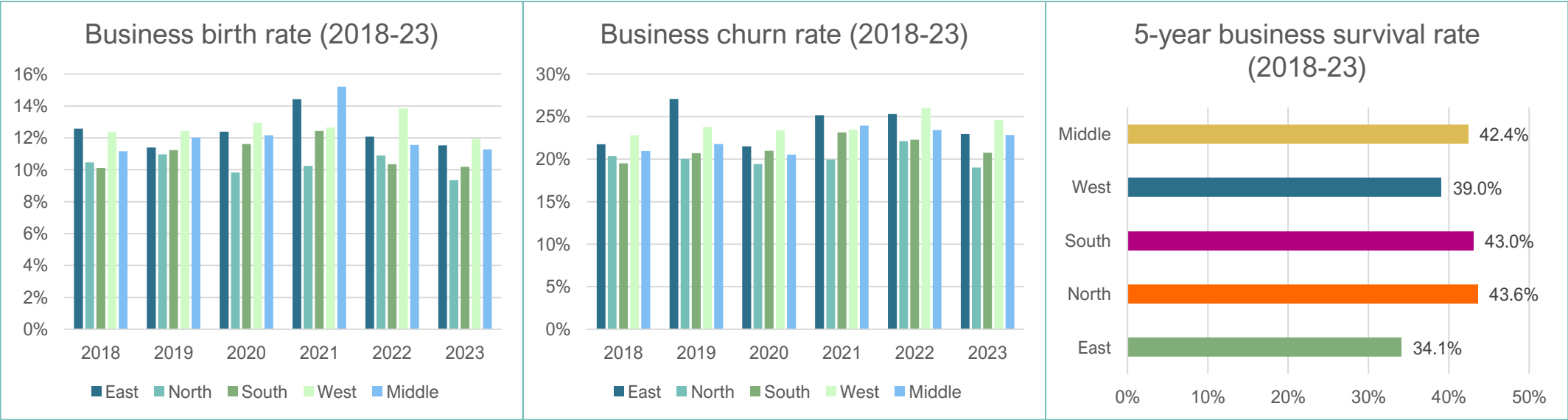


Source: Business Demography, ONS, 2024

Business demography – 5UA



- Business birth rates have all fallen since 2021 with wide variation. West, East, and Middle 11-12%, South at 10%, and North lowest at around 9.5%.
- Wide variation in business churn rate – West highest at almost 25%, East and Middle at 23%, North and South lower at 19% and 21%. East only area where business birth rate higher than death rate so only area where business numbers are growing slightly.
- Variation in business survival rate – only around one third of businesses survive their first five years of operation in the East whereas all other unitaries have a higher survival rate than the regional average particularly in North, South, and West.

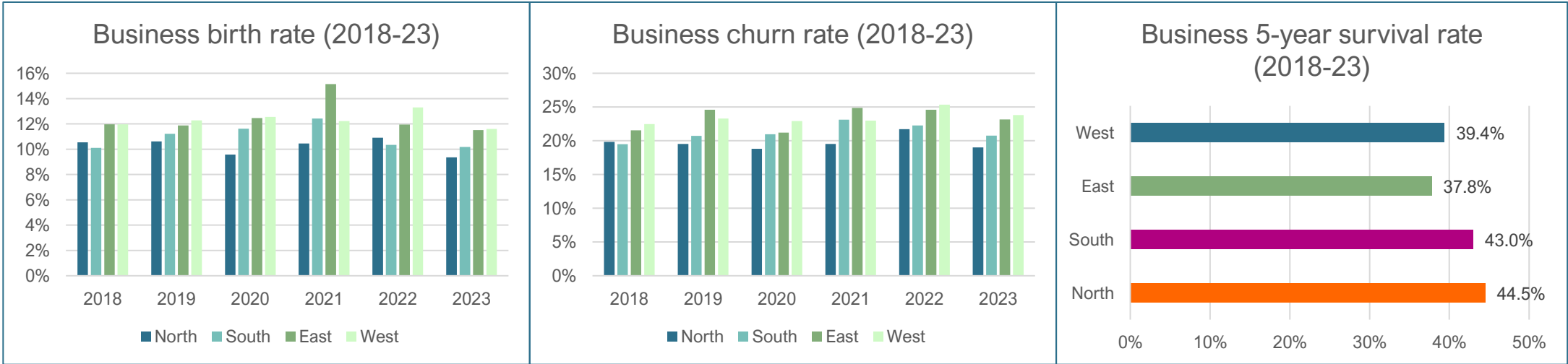


Source: Business Demography, ONS, 2024

Business demography – 4UA B



- Business birth rates have all fallen since 2021 with wide variation. West and East 11.5%, South at 10%, and North lowest at around 9.5%.
- Wide variation in business churn rate – West highest at 24%, East 23%, North and South lower at 19% and 21%. The business death rate is higher than birth rate so business base declining in all areas in 2023 which has continued to decline into 2024 particularly in East and South.
- Variation in business survival rate – North and South high compared to nationally, West in line with the national average, and East more in line with the regional average.

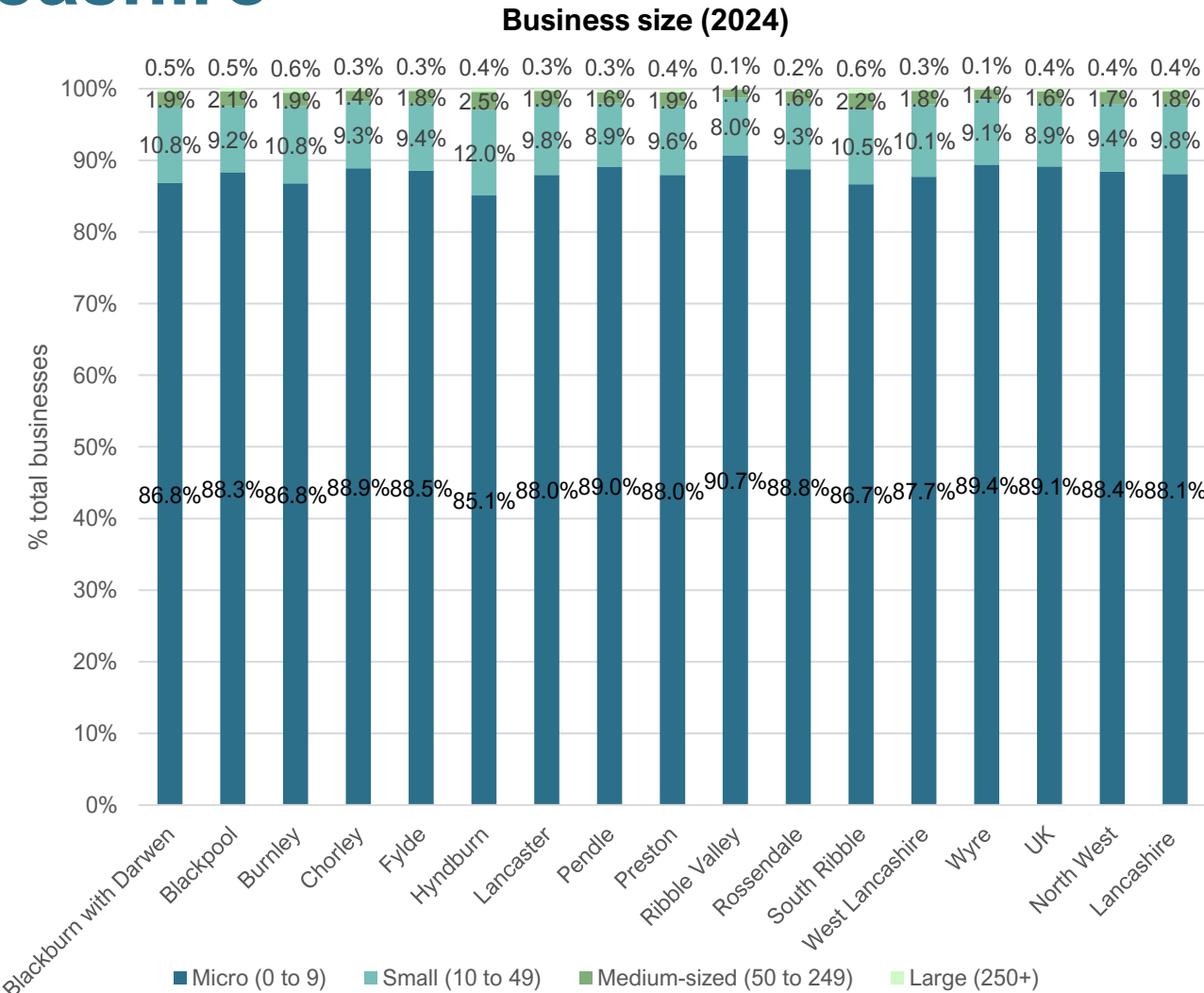


Notes: Business demography estimates are unavailable below LA level. To calculate estimates for the 4UA B option, we have used proportions of total businesses made up in North and South Ribble Valley and Urban and Rural Wyre to calculate number of business births, business deaths, the number of businesses surviving their first 5 years of operation and high growth businesses.

Source: Business Counts, ONS, 2025; Ward-level population estimates, ONS, 2024

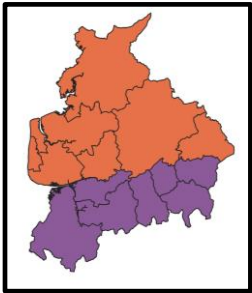
Size of businesses – Lancashire

- Across Lancashire, there is a slightly lower proportion of micro businesses compared to the national average and a slightly higher proportion of small businesses but there is not a significant difference in the business composition compared to the regional and national averages.
- Hyndburn and South Ribble have the most distinctive business compositions – there is a relatively high proportion of medium and large businesses but again there is not much variation compared to regional and national averages.
- Ribble Valley and Wyre have the highest proportion of micro businesses, the only districts with a higher proportion than the national average as well as lower proportions of large businesses.

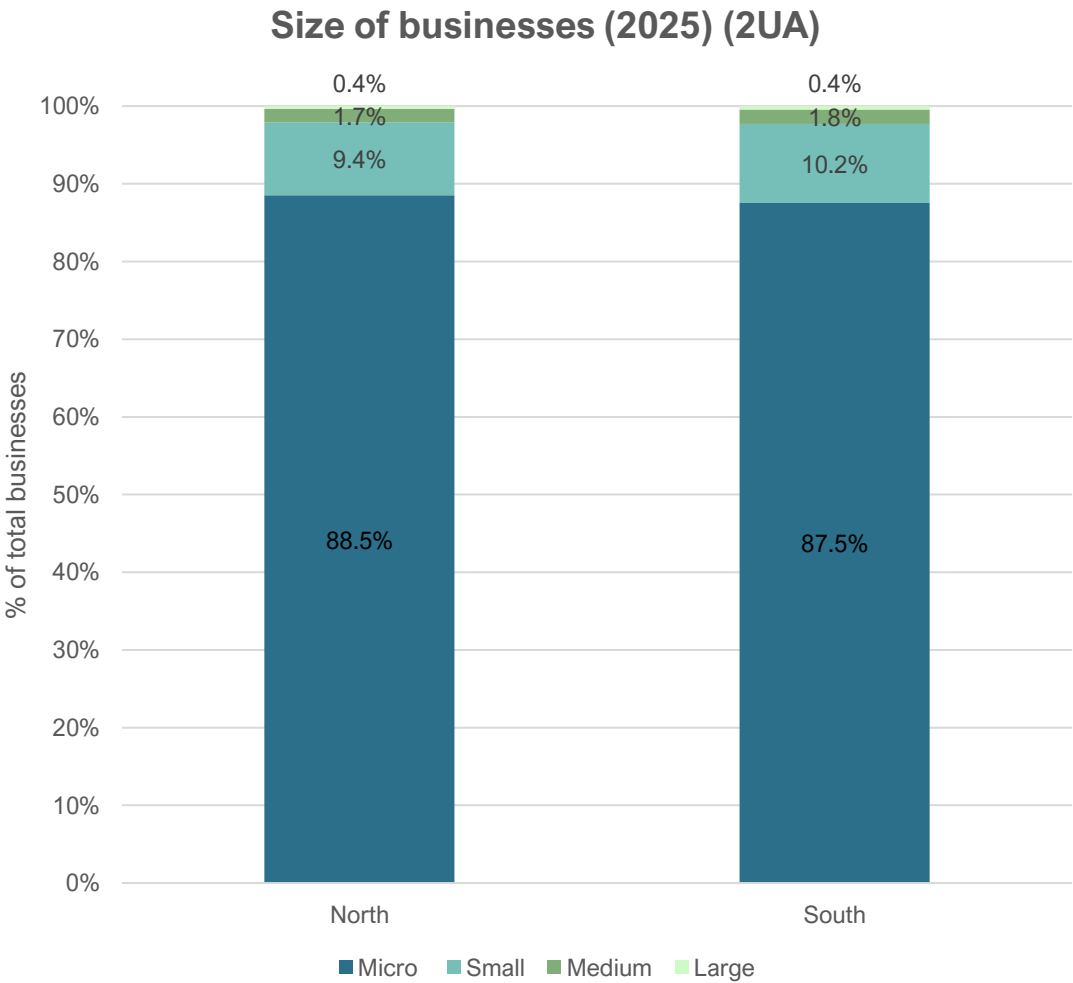


Source: Business Counts, ONS, 2025

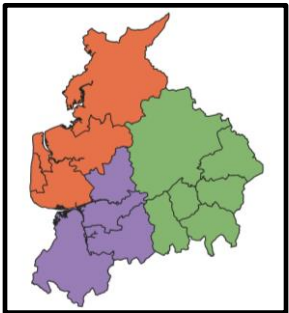
Size of businesses – 2UA



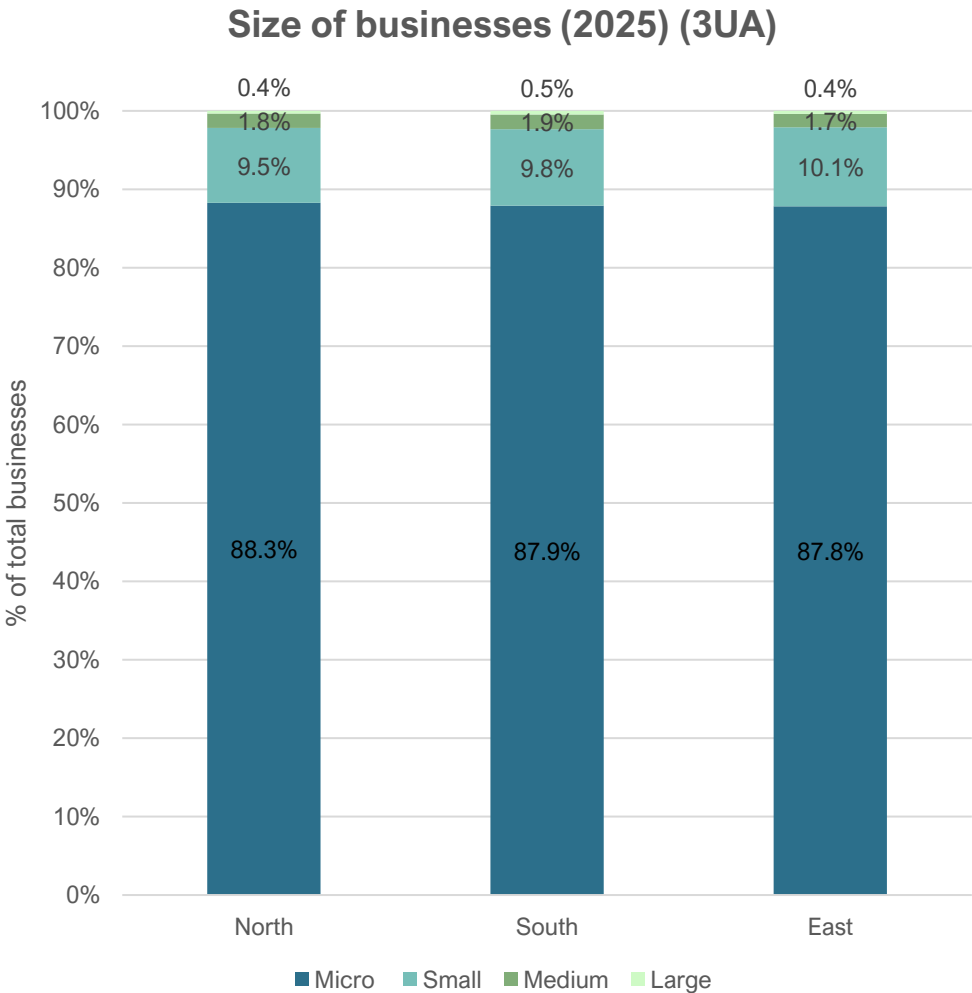
There is not significant variation in size of business across the different UA options. North in option 4B has the highest proportion of micro businesses (employing 0-9 employees) at 89% but no UA across options has fewer than 87.3% of businesses which are micro and across UAs, around 98% of total businesses are either micro or small businesses (employing 10-49 employees).



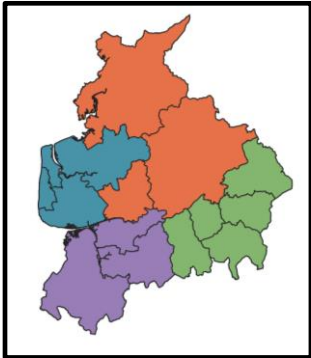
Size of businesses – 3UA



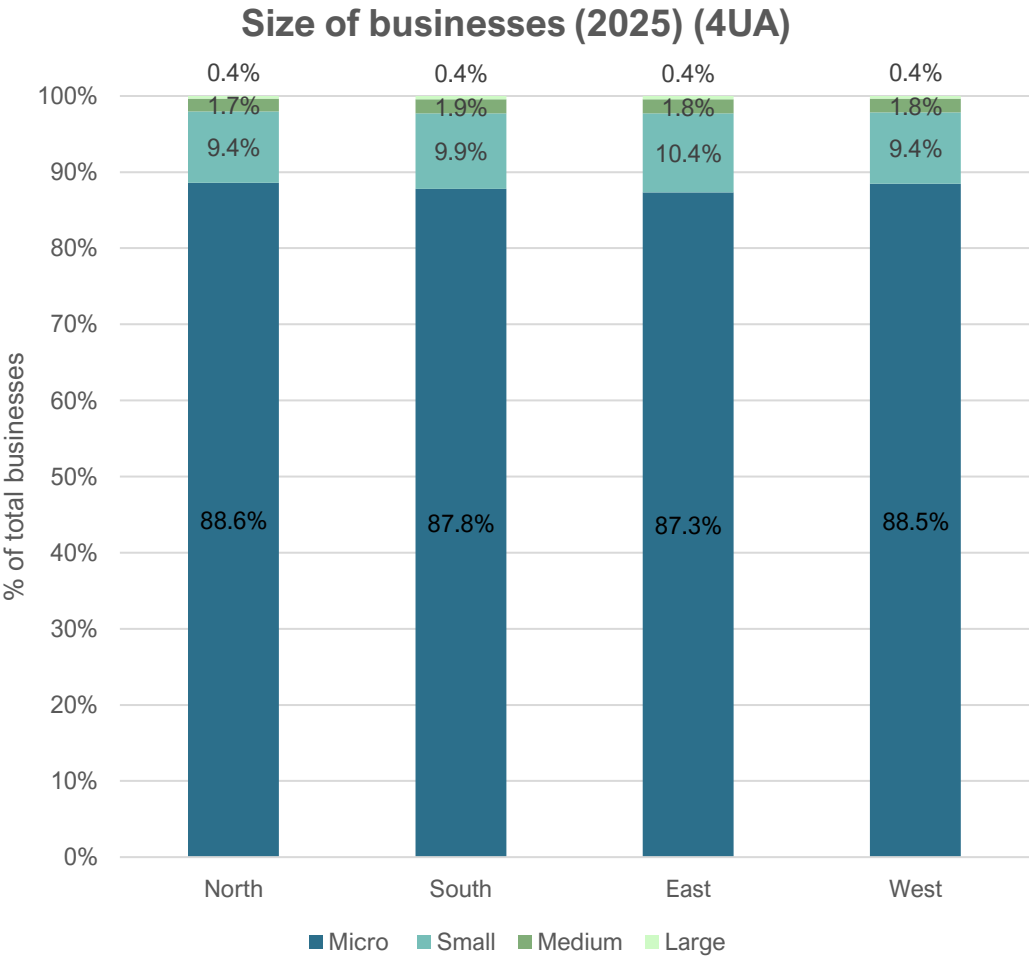
There is not significant variation in size of business across the different UA options. North in option 4B has the highest proportion of micro businesses (employing 0-9 employees) at 89% but no UA across options has fewer than 87.3% of businesses which are micro and across UAs, around 98% of total businesses are either micro or small businesses (employing 10-49 employees).



Size of businesses – 4UA



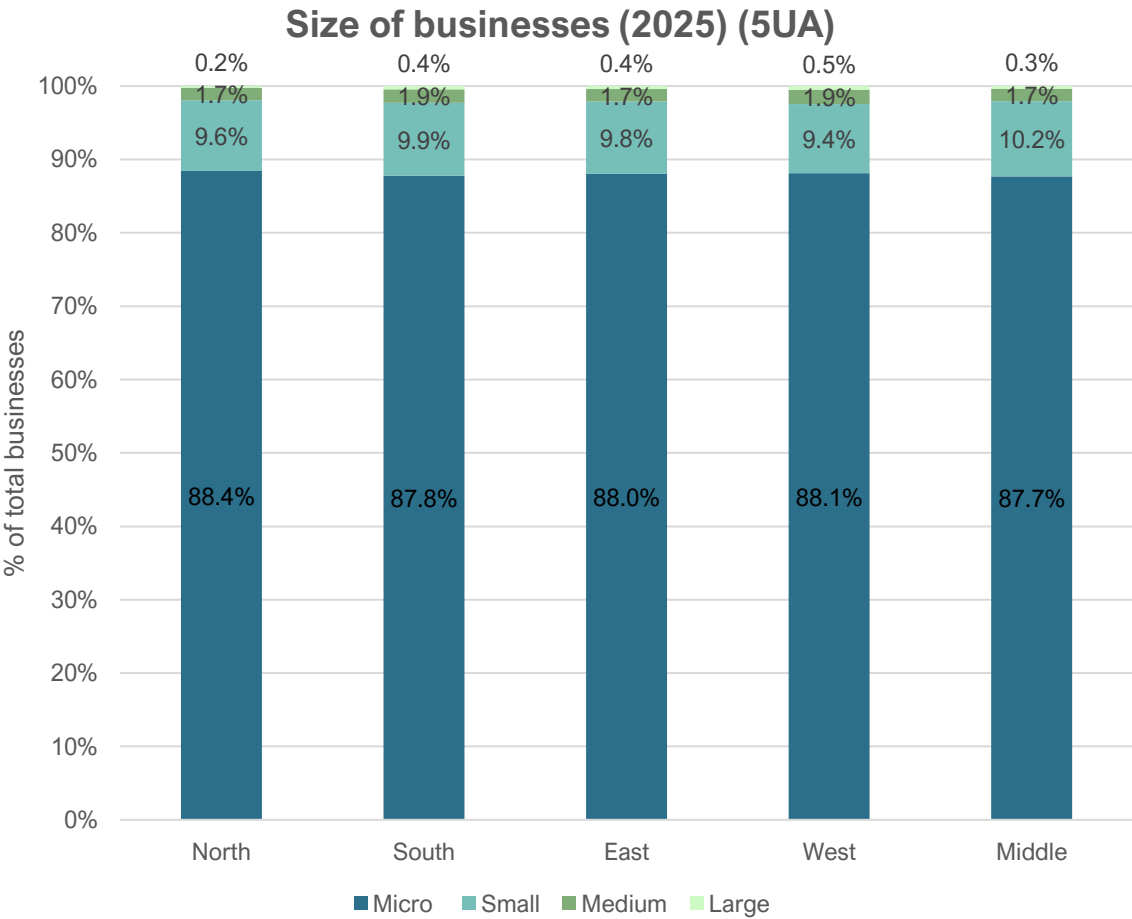
There is not significant variation in size of business across the different UA options. North in option 4B has the highest proportion of micro businesses (employing 0-9 employees) at 89% but no UA across options has fewer than 87.3% of businesses which are micro and across UAs, around 98% of total businesses are either micro or small businesses (employing 10-49 employees).



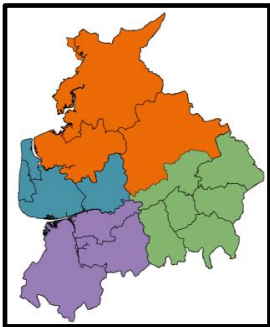
Size of businesses – 5UA



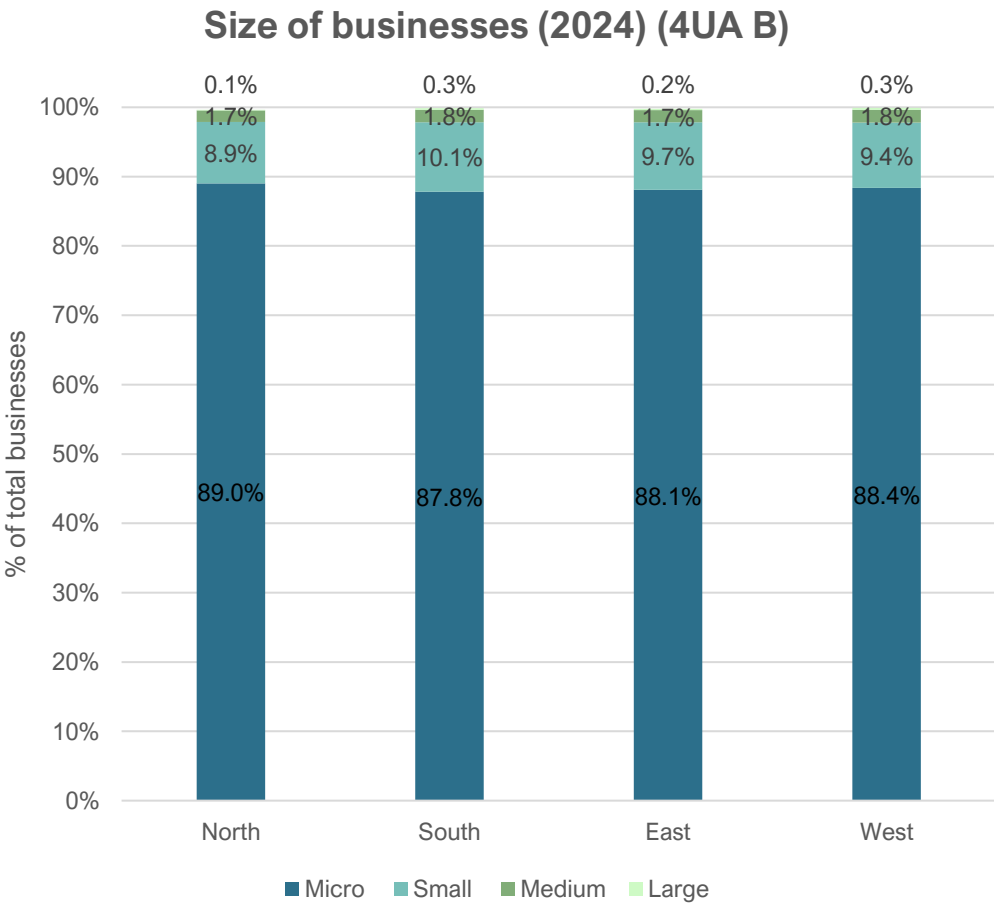
There is not significant variation in size of business across the different UA options. North in option 4B has the highest proportion of micro businesses (employing 0-9 employees) at 89% but no UA across options has fewer than 87.3% of businesses which are micro and across UAs, around 98% of total businesses are either micro or small businesses (employing 10-49 employees).



Size of businesses – 4UA B

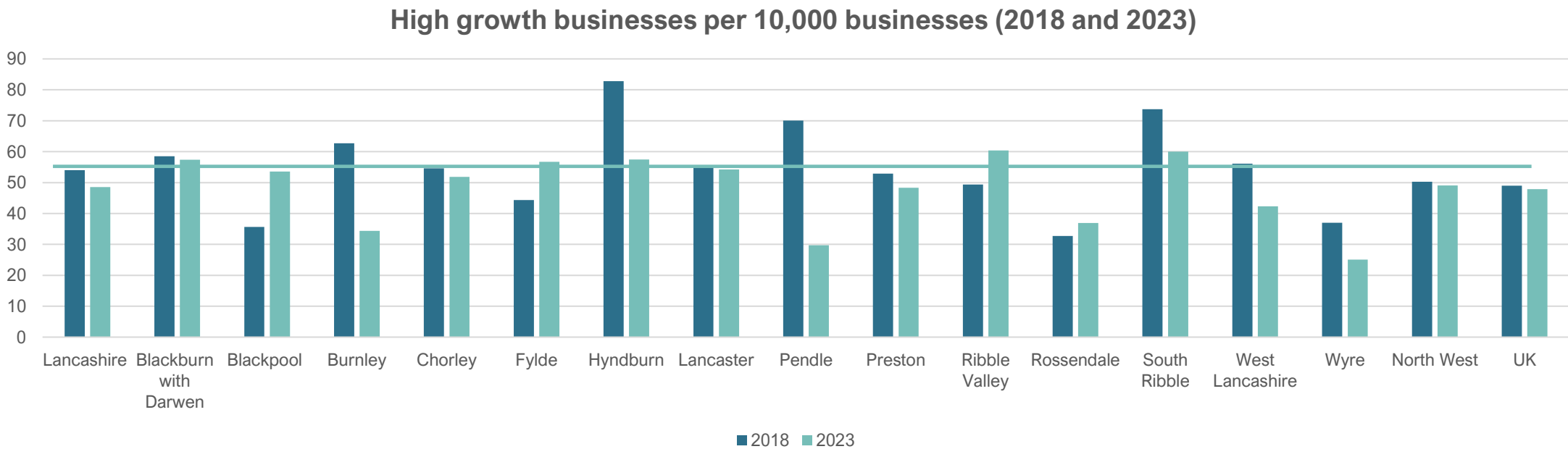


There is not significant variation in size of business across the different UA options. North in option 4B has the highest proportion of micro businesses (employing 0-9 employees) at 89% but no UA across options has fewer than 87.3% of businesses which are micro and across UAs, around 98% of total businesses are either micro or small businesses (employing 10-49 employees).



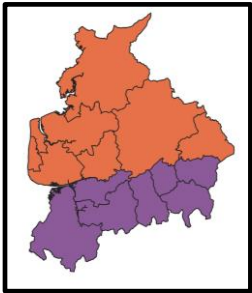
High growth businesses – Lancashire

Lancashire has seen a 5% reduction in the number of high growth businesses between 2018 and 2023 from 295 to 280. This means that the number of high growth businesses per 10,000 businesses has fallen back. Although this is reflective of wider trends, the fall in high growth businesses is greater than regionally and nationally. Nonetheless, the number of high growth businesses per 10,000 businesses is in line with the regional and national average at the Lancashire level. Despite the large decline, Hyndburn and South Ribble have high numbers of high growth businesses, along with Blackburn, Blackpool which has seen a strong increase, Chorley, Fylde, Lancaster, and Ribble Valley. Burnley has seen a large drop and has a low number of high growth businesses along with Pendle, Rossendale, and Wyre.

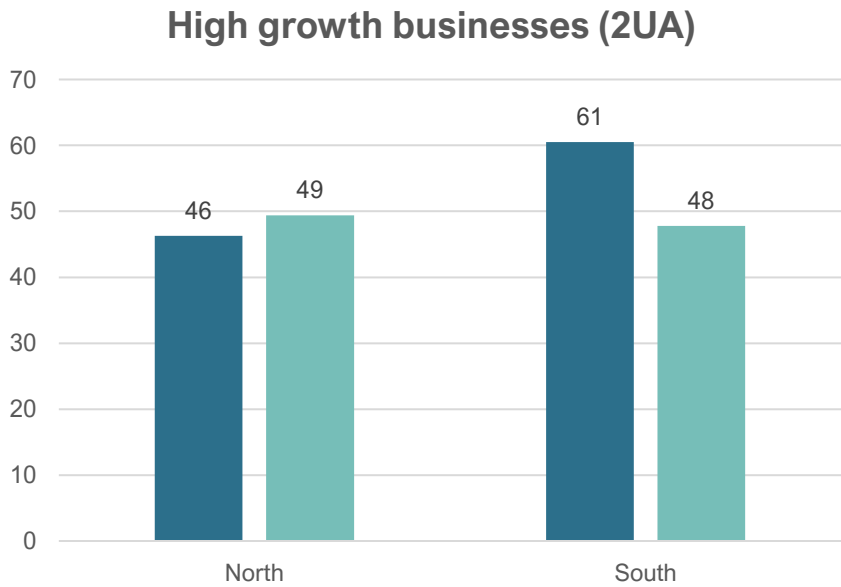


Notes: This is calculated by dividing the number of high growth businesses by the number of active enterprises and standardising by multiplying by 10,000.
Source: Business Demography, ONS, 2024

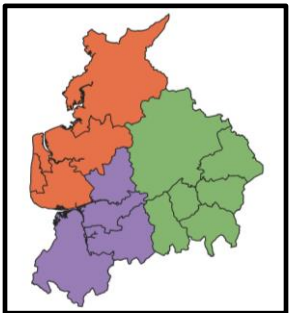
High growth businesses – 2UA



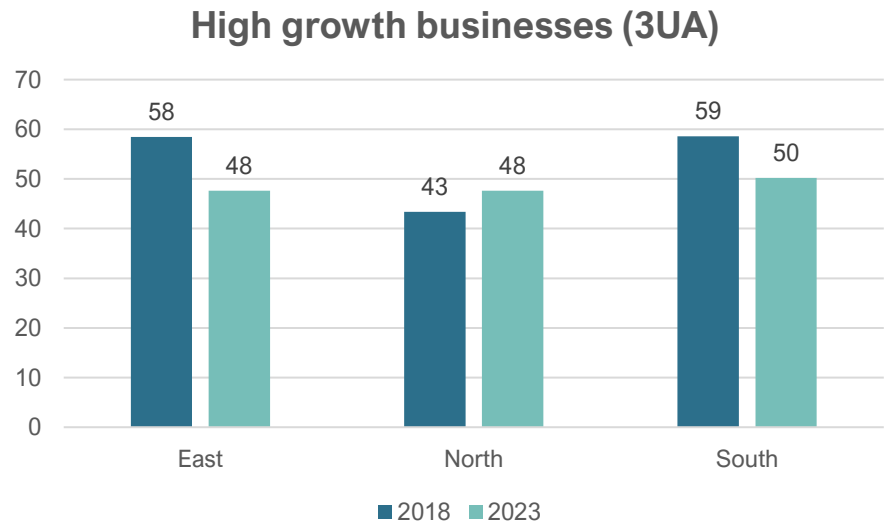
- South has slightly more high growth businesses despite a fall by -17% to 150.
- North a rise in high growth businesses by 13% to 130.
- Similar trends as seen in business concentration after a strong fall in South with both authorities in line with regional average of 49 high growth businesses per 10,000 businesses.



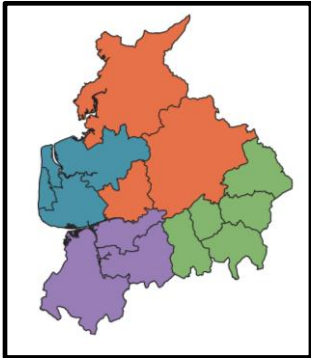
High growth businesses – 3UA



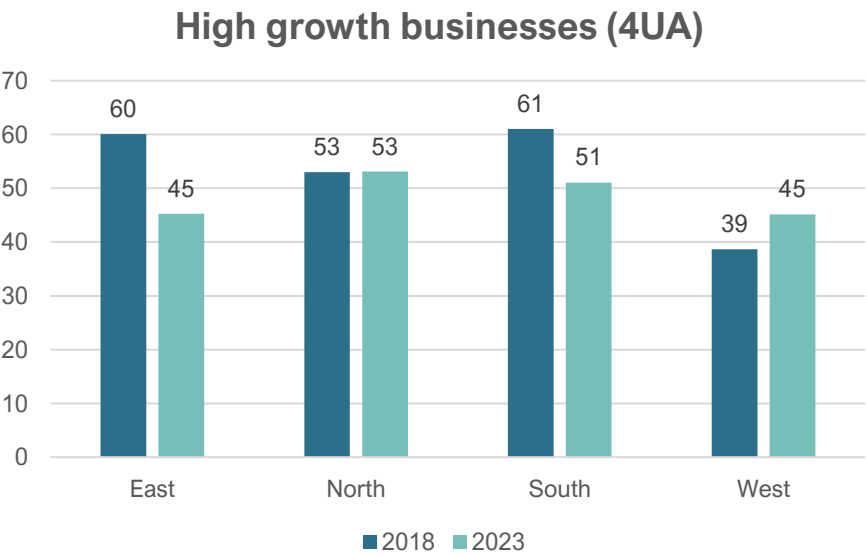
- A fall in both East and South by -13% and -9% respectively to 100 high growth businesses.
- North a rise by 14% to 80 high growth businesses – only authority to see a rise in high growth businesses per 10,000 businesses.
- All UAs in line with regional average of 49 high growth businesses per 10,000 businesses.



High growth businesses – 4UA



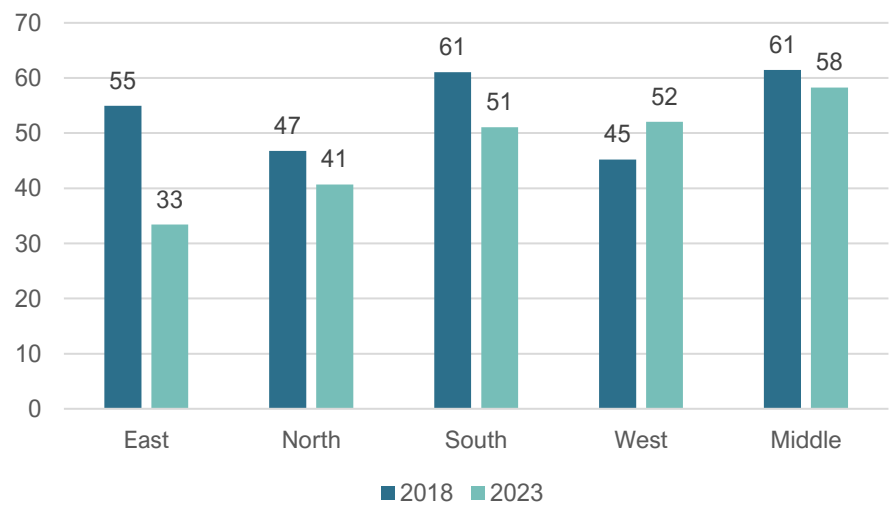
- West fastest rise in high growth businesses by 22% to 55 but remains below regional average along with East which has seen a 20% decline in high growth businesses to 80.
- North has seen a rise of 7% to 75 high growth businesses.
- Despite a fall in high growth businesses in South to 70, both North and South above regional average of high growth businesses.



High growth businesses – 5UA

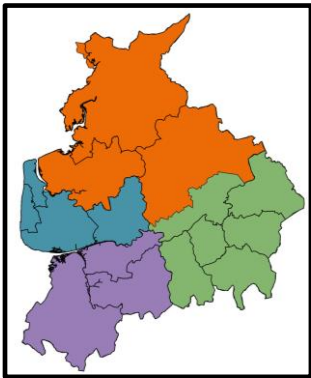


High growth businesses (5UA)

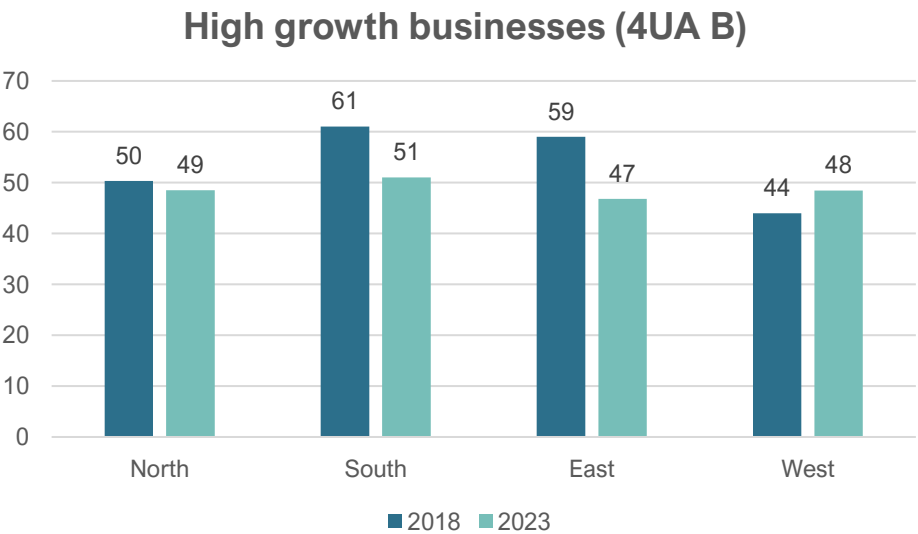


- West has seen the number of high growth businesses rise by a quarter to 75 and Middle by 8% to 70.
- A drop by -12.5% to 70 in South. However, West, Middle, and South above regional average.
- North a drop by -12.5% to 35 high growth businesses.
- East the sharpest drop by -40% to 30 high growth businesses and is furthest from regional average.
- The gap between the number of high growth businesses per 10,000 businesses in East and Middle UAs is the highest across options.

High growth businesses – 4UA B



- South and East have seen significant drops in the number of high growth businesses by -15% in the East and -12.5% in the South.
- West has seen a rise in the number of high growth businesses by 17% with little change in the North.
- These changes mean that there is little variation in the number of high growth businesses between the UAs, all around the regional average of 49 high growth businesses per 10,000 businesses.

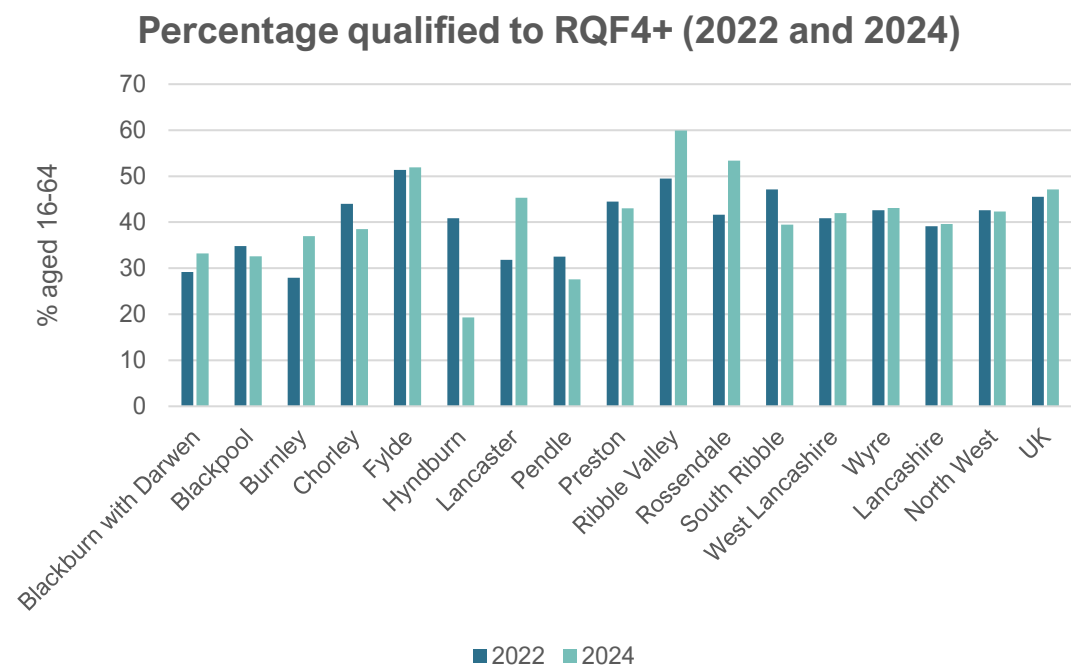


Notes: business demography estimates are unavailable below LA level. To calculate estimates for the 4UA B option, we have used proportions of total businesses made up in North and South Ribble Valley and Urban and Rural Wyre to calculate number of high growth businesses.

Source: Business Demography, ONS, 2024; Business Counts, ONS, 2025

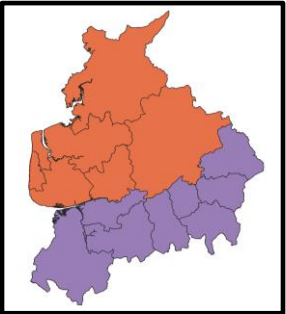
Qualifications attainment

RQF4+ qualifications refer to education levels at Regulated Qualifications Framework Level 4 and above - including Higher National Certificates, foundation degrees, bachelor’s degrees, and postgraduate qualifications. These represent advanced skills and knowledge typically gained through higher education or equivalent professional training. Between 2022 and 2024, Lancashire consistently lagged behind both the North West and UK in the proportion of its population holding RQF4+ qualifications; in 2024 Lancashire lagged the regional average by 2.7pp and 7.5pp nationally.

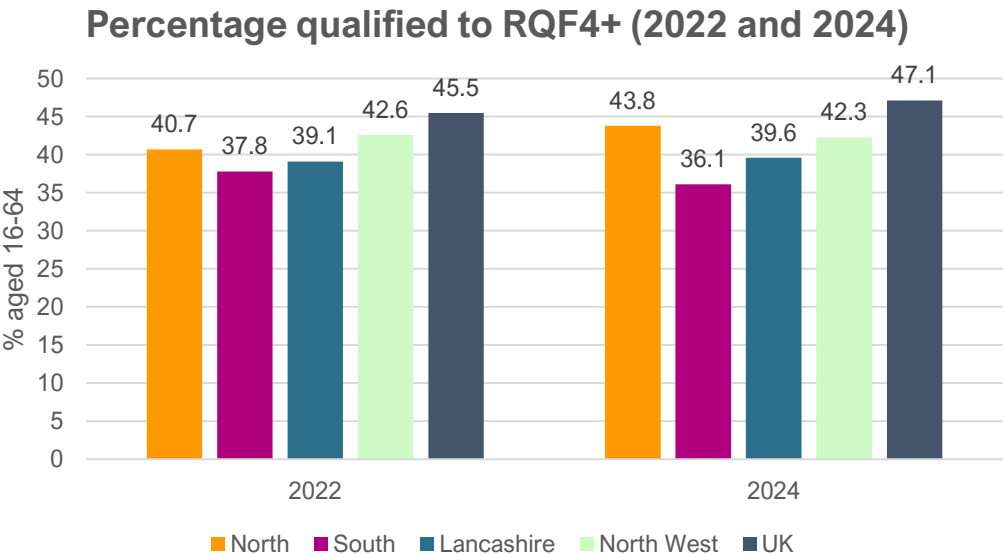


- Districts with RQF4+ qualification attainment above the national average (2022–2024) include Fylde, Ribble Valley, and Rossendale.
- Districts below the regional average include Blackburn with Darwen, Blackpool, Burnley, Chorley, Pendle, South Ribble, and Hyndburn which is the lowest at fewer than one in five qualified to degree level and above.

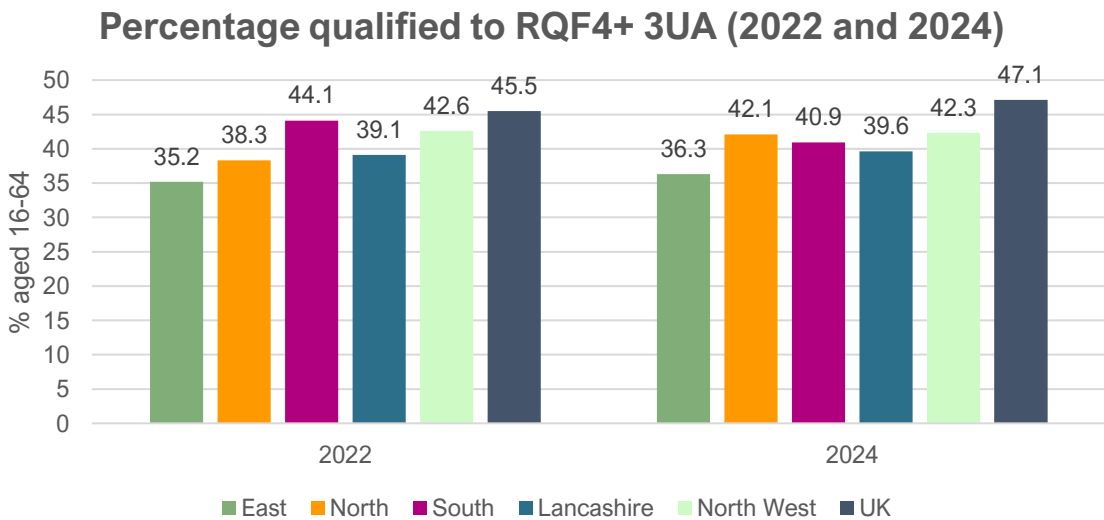
Qualifications attainment – 2UA



- The North has consistently outperformed the South and has seen continual improvement with an increase in the proportion of the population qualified to degree level and above from 41% to 44%, moving to a point which is above the regional average although remains below 47% nationally.
- South continues to see a lower proportion qualified to degree level and above and this has fallen from 38% to 36% – 6 percentage points below the regional average in 2024. The gap in attainment between North and South has widened from 3 percentage points to 7.5 percentage points.

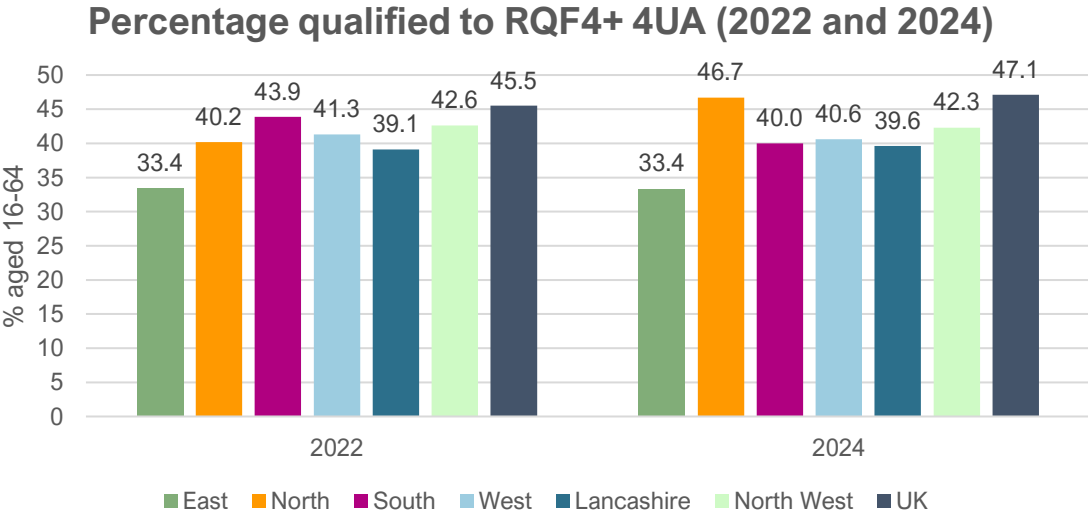


Qualifications attainment – 3UA



- North has overtaken the South in RQF4+, rising to 42% of the working age population in the North, the only UA in line with the regional average.
- South attainment has fallen to a point of being below the regional average at 41%.
- East has also seen a rise in the proportion of people qualified to degree level or above to 36% but this remains 6 percentage points below the regional average.
- The gap of 6 percentage points between highest and lowest attainment in the 3UA option is lowest across options.

Qualifications attainment – 4UA

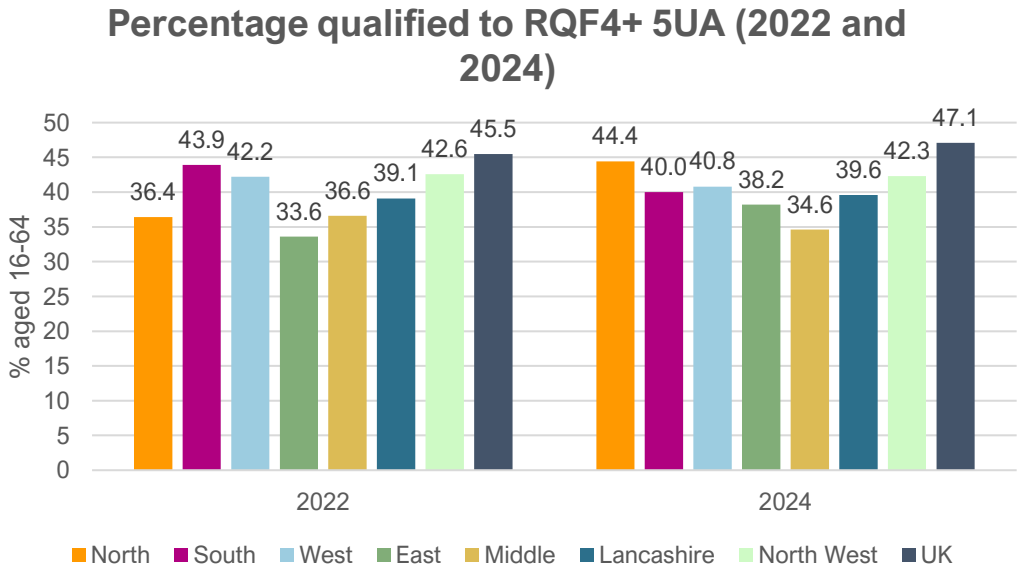


- North has become the UA with the highest proportion qualified to RQF4+ at around 47% of the working age population, above the regional average and in line with the national average. This is the only UA with a higher proportion than the national average.
- South and West have seen a fall, particularly in the South with both just below the regional average.
- East has seen no change with a third of the working age population qualified to RQF4+ by far the lowest of the UAs and almost 10 percentage points below the regional average.
- The gap between North with the highest and East the lowest attainment is over 13 percentage points, the highest across UA options.

Qualifications attainment – 5UA



- North has shown a strong rise in the proportion of people qualified to degree level and above up to 44%, higher than the regional average of 42% but below the national average of 47%. North is the only UA with higher attainment than the regional average.
- South and West have both seen a fall in attainment levels to 40-41% so just below the regional average.
- Attainment has risen strongly in the East but remains 4 percentage points below the regional average
- The proportion qualified to RQF4+ has fallen in Middle Lancashire and is almost 8 percentage points below the regional average.



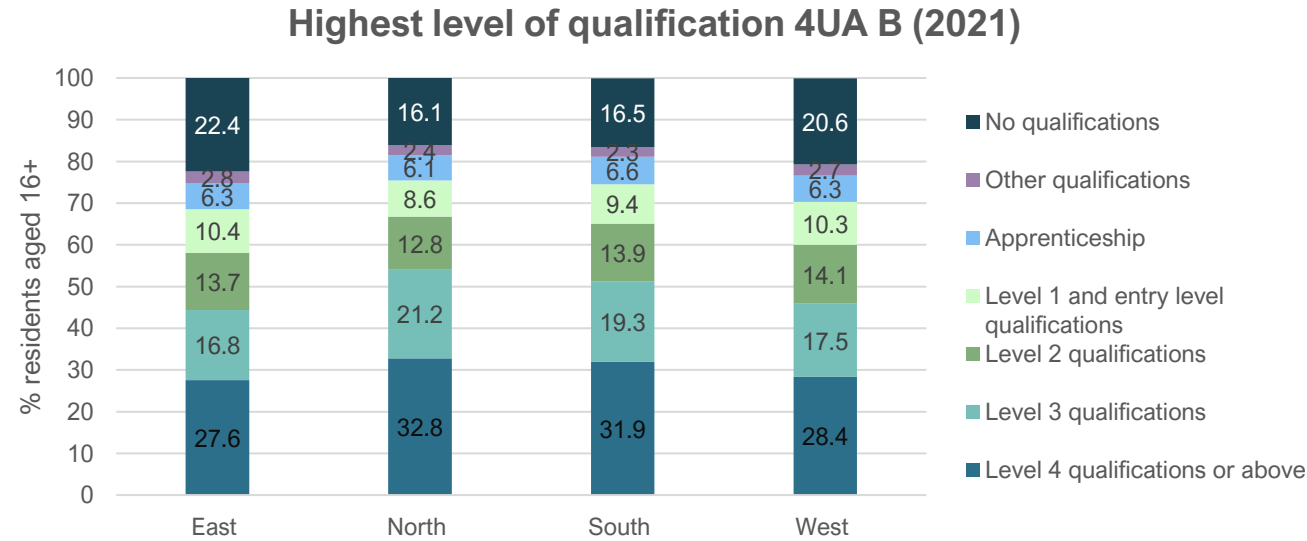
Source: Annual Population Survey, ONS, 2025

Qualifications attainment – 4UA B

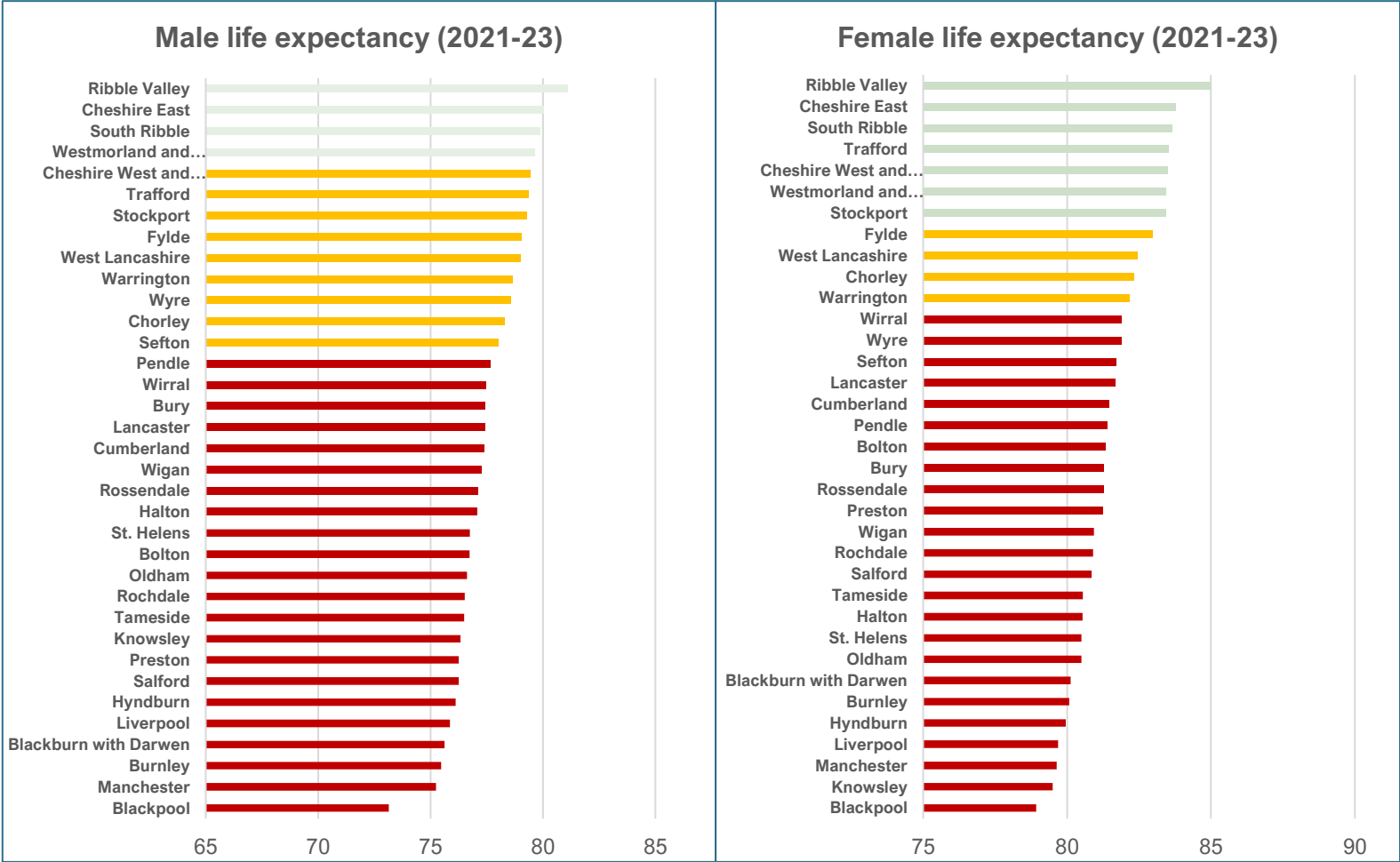


ONS APS unavailable below LA level so we have used the ONS Census to source qualifications attainment. Figures will vary to those from the previous slides as this refers to all residents aged over 16 whereas the data for other UA options considers qualifications held by the working age (16-64) population.

- North has the highest proportion qualified to degree level and above (level 4+) followed by South with both just under a third of residents.
- West and East have fewer people qualified to degree level and more people with no formal qualifications
- Both East and West, at least a fifth of residents have no formal qualifications, whereas fewer residents have no formal qualifications in North and South.



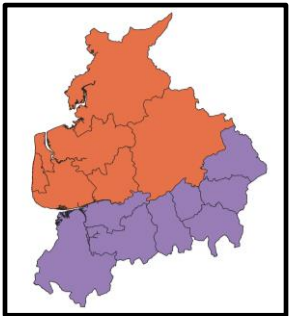
Life expectancy – Lancashire



- Female life expectancy 4 years above male life expectancy across Lancashire (12 districts) (82 years and 77.9 years).
- Lancashire life expectancy relatively high to North West average but five of lowest ten male life expectancies and four areas of lowest ten female life expectancies are in Lancashire.
- Female life expectancy is 82 years, above the North West average of 81.6 but below the national average of 83.1
Significant variation between highest life expectancy in North West in Ribble Valley and lowest in Blackpool of six years. Four districts below regional average (Blackpool, Hyndburn, Burnley, Blackburn but South Ribble and Ribble Valley above the national average.
- Male life expectancy across Lancashire (12 districts and 2 unitary) is 77.9 years, above North West average of 77.5 but below national average of 79.1. Significant variation between districts of highest life expectancy across the North West in Ribble Valley and lowest in Blackpool of eight years. Five districts below regional average (Blackpool, Burnley, Blackburn, Hyndburn, and Preston) but South Ribble and Ribble Valley above the national average.

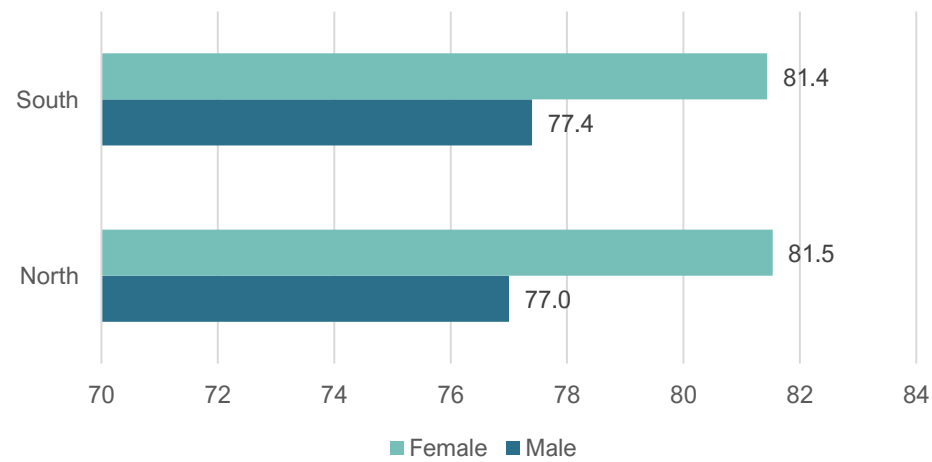
Notes: Those in red shows areas that are below the regional average (95% confidence interval below North West value), those in amber between the regional and national average (95% confidence interval between North West and national values) and those in green above the national average (95% confidence interval above the national average).
Source: Health State Life Expectancy, all ages, UK, ONS, 2025

Life expectancy – 2UA



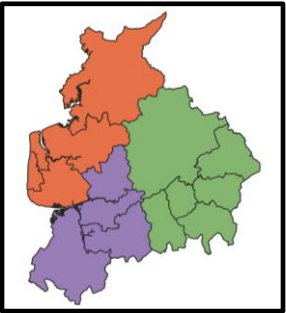
- South Lancashire a slightly higher average life expectancy than North – both in line with the regional average.

Life expectancy 2UA (2021-23)

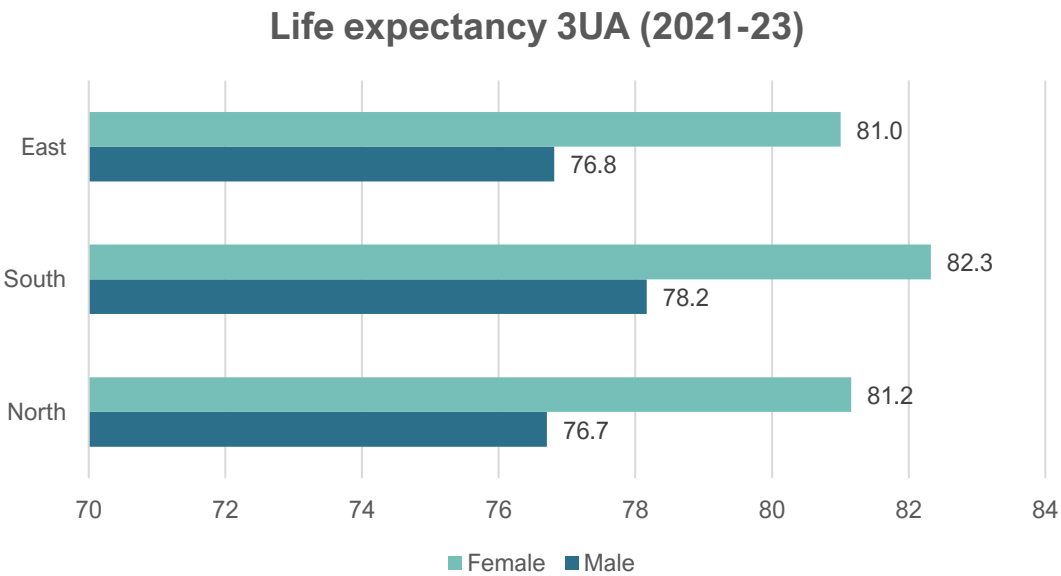


Notes: UA estimates have been calculated using population weighted averages
Source: Health State Life Expectancy, all ages, UK, ONS, 2025

Life expectancy – 3UA

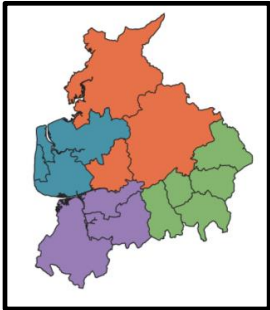


- South Lancashire highest life expectancy above regional average for both men and women.
- East and North Lancashire slightly below the regional average for both men and women.

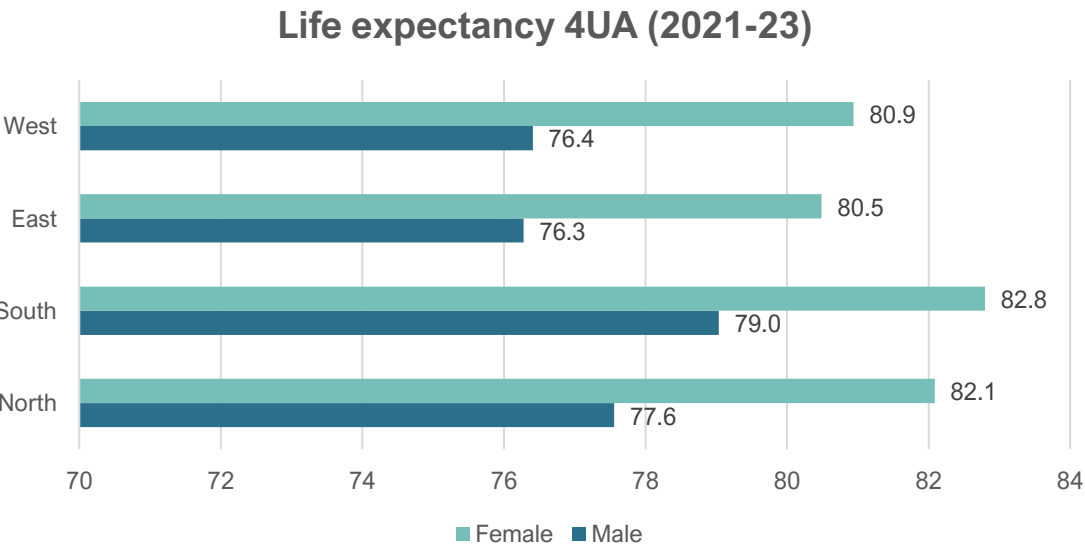


Notes: UA estimates have been calculated using population weighted averages
Source: Health State Life Expectancy, all ages, UK, ONS, 2025

Life expectancy – 4UA



- South UA highest life expectancy, above the regional average for both men and women.
- North UA next highest life expectancy, above the regional average for women and in line for men.
- East and West both below the regional average for both men and women.

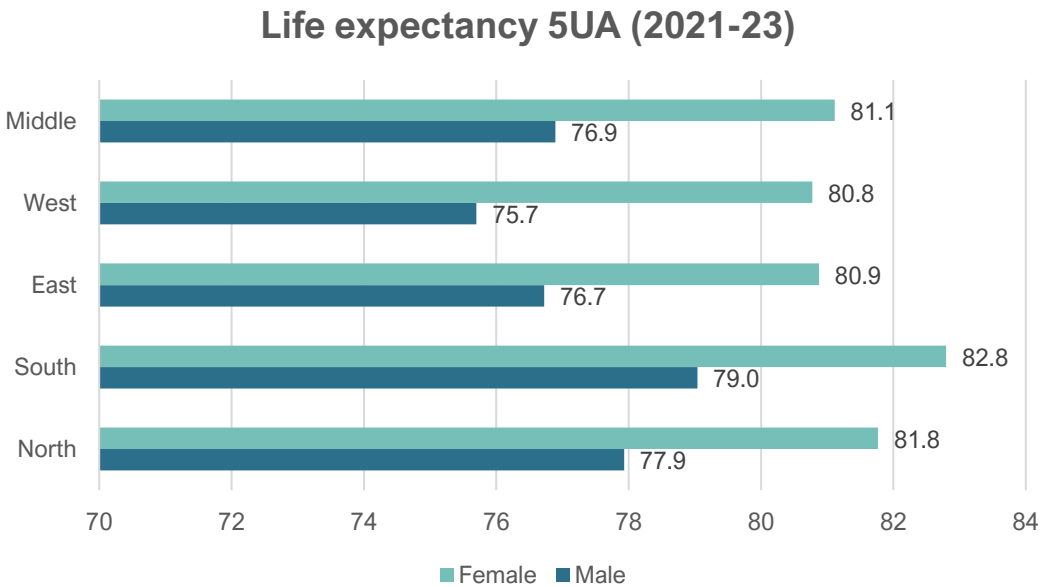


Notes: UA estimates have been calculated using population weighted averages
Source: Health State Life Expectancy, all ages, UK, ONS, 2025

Life expectancy – 5UA

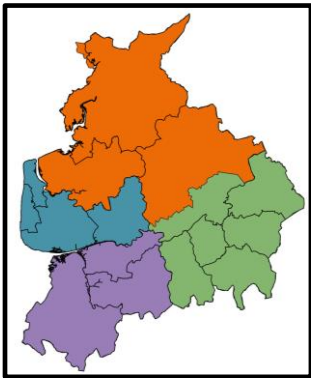


- South Lancashire highest life expectancy in line with national average for both men and women.
- West, East and Middle Lancashire below regional average. West has the lowest life expectancy particularly for men.
- North in line with the regional average for both men and women.



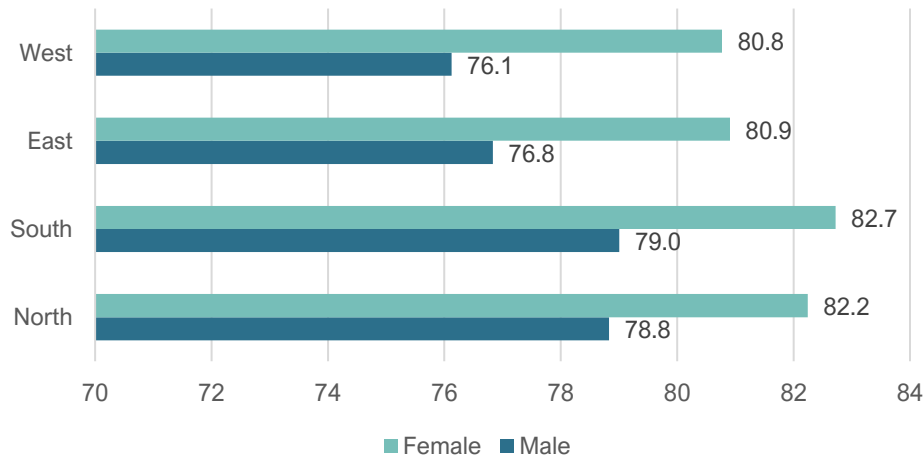
Notes: UA estimates have been calculated using population weighted averages
Source: Health State Life Expectancy, all ages, UK, ONS, 2025

Life expectancy – 4UA B



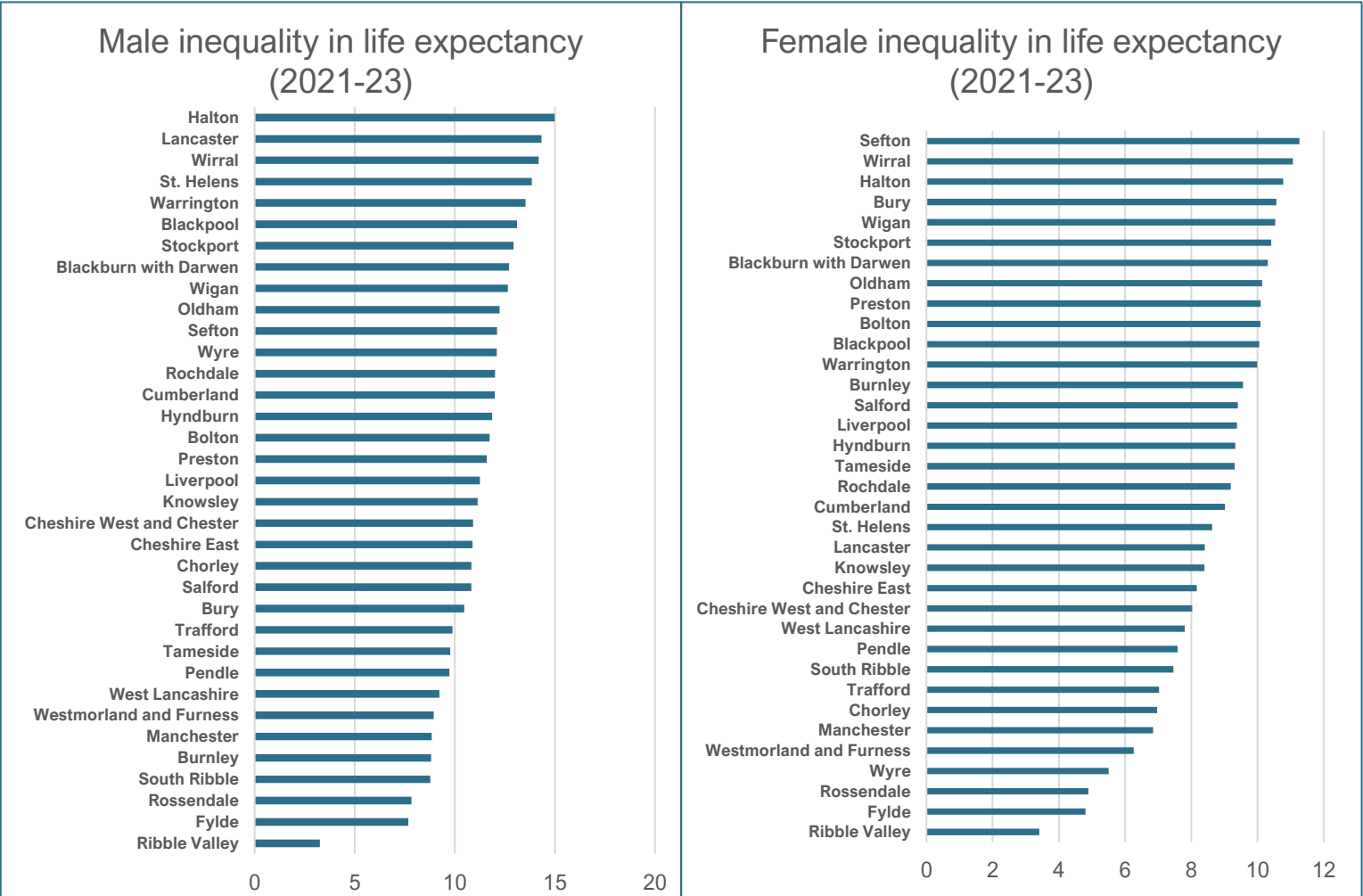
- *MSOA data used to construct the UA estimates for the 4UA B model are averages over the period between 2019-23.*
- South has the highest life expectancy for both men and women, roughly in line with the national average and above the regional average.
- North has the next highest life expectancy which is above the regional average for both men and women.
- Life expectancy is lower for both men and women in the East and West UAs, particularly for men in the West UA.

Life expectancy 4B (2019-23)



Notes: UA estimates have been calculated using population weighted averages
Source: Health State Life Expectancy, all ages, UK, ONS, 2025

Inequality in life expectancy

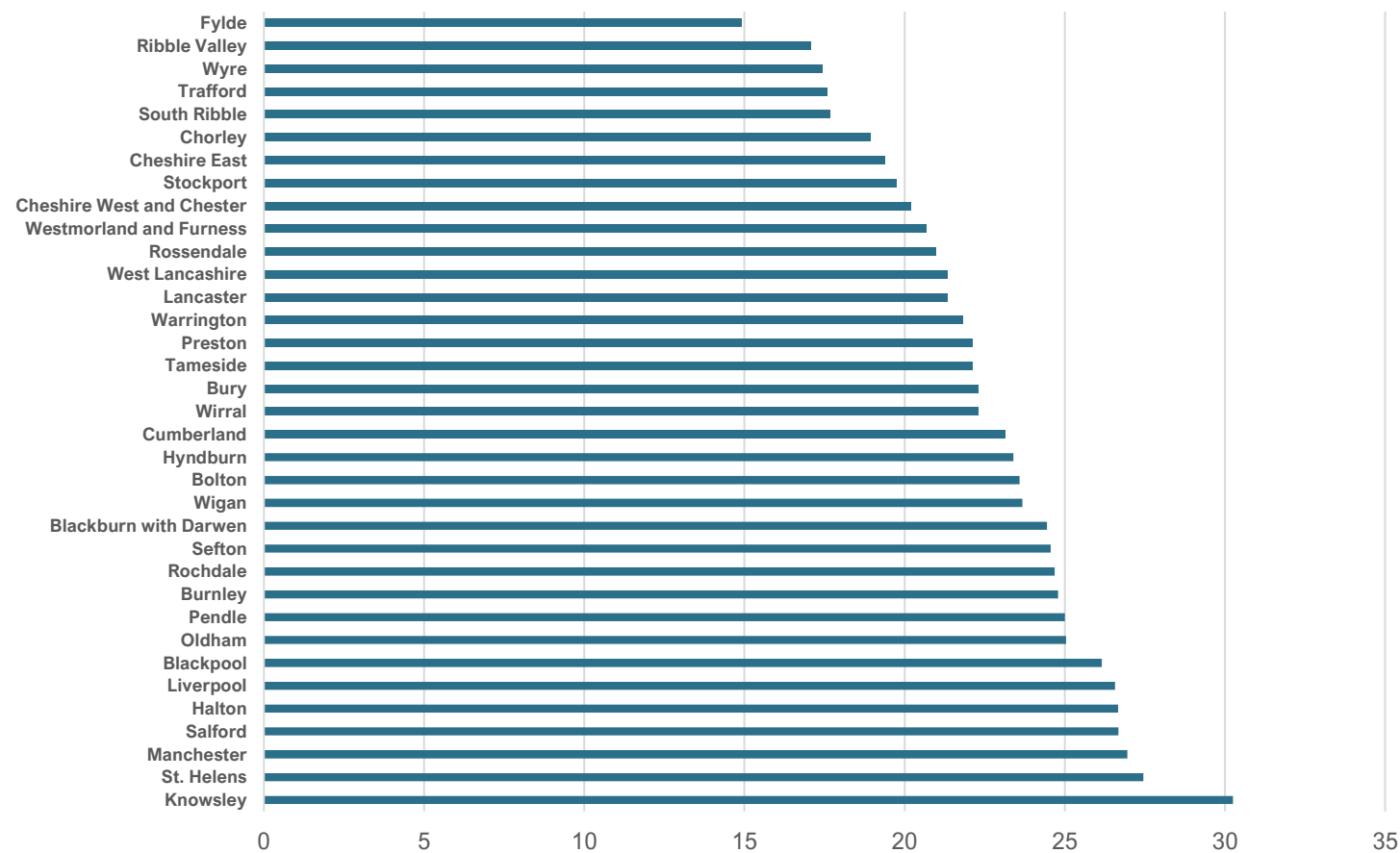


Notes: Due to wide 95% confidence intervals, these figures have not been rag rated against either national or regional averages
Source: Office for Health Improvement & Disparities Inequality in life expectancy at birth, 2025

- The chart shows the slope index of inequality which represents the range in years of life expectancy across the social gradient from most to least deprived, based on a statistical analysis of the relationship between life expectancy and deprivation across all lower super output areas.
- Across Lancashire (Lancashire 12), it is estimated that men from most deprived areas will live 11.6 years fewer and for women 8.6 years fewer than those from least deprived areas. This is slightly below what is seen regionally – North West average is 12.6 for men and 10.2 for women but nonetheless highlights the inequality in experience across Lancashire.
- The difference in life expectancy is consistently higher for men apart from Burnley and Ribble Valley.
- Inequality in life expectancy for men is higher in Lancaster, Blackpool, Blackburn, Wyre, Hyndburn and Preston at least 11.5 years less for those from deprived areas. The difference is lower in Ribble Valley, Fylde and Rossendale.
- Inequality for women is higher in Blackburn, Blackpool, Preston and Burnley at least 9.5 years fewer for those form more deprived areas. It is lower in Ribble Valley, Fylde, Rossendale and Wyre.

Prevalence of obesity of children

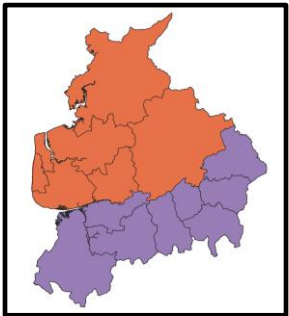
Year 6 prevalence of obesity (2023/24)



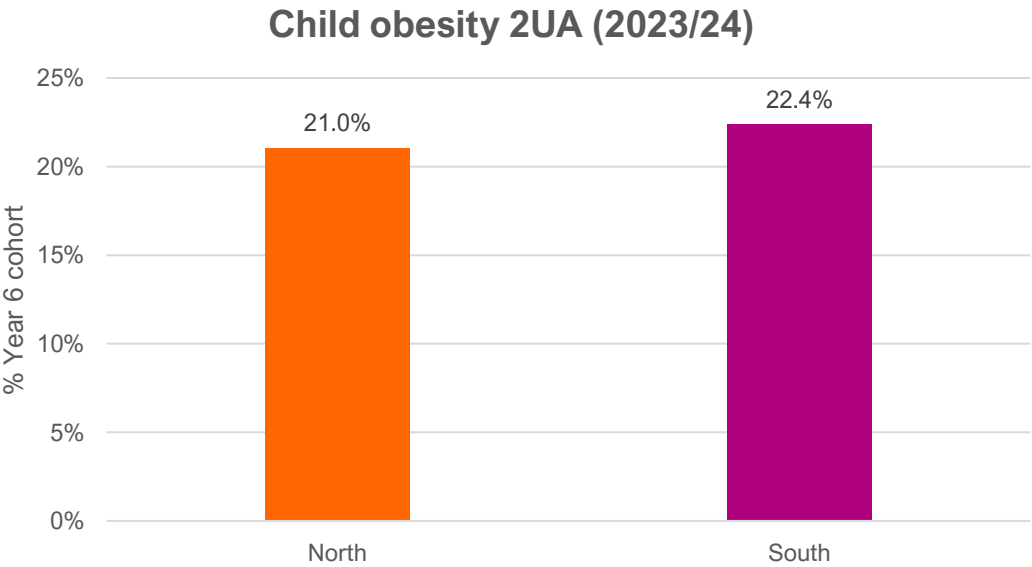
- Across Lancashire (Lancashire 12) just over a fifth of children (20.9%) in Year 6 (aged 10-11) are obese including severe obesity, below the national average of 22.1% and regional average of 23.3% in 2023/24.
- Blackpool, Pendle, Burnley, Blackburn around a quarter of those in Year 6 are obese, and 23.4% in Hyndburn.
- Fylde, Ribble Valley and Wyre have the lowest levels of child obesity across the North West, with Chorley and South Ribble less than one fifth of those in Year 6 classes as obese.

Notes: Due to wide 95% confidence intervals, these figures have not been rag rated against either national or regional averages
Source: Year 6 prevalence of obesity (including severe obesity), Office for Health Improvement & Disparities, 2025

Child Obesity – 2UA

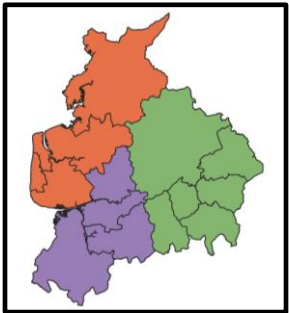


- Across Lancashire, over a fifth (21%) of year 6 students (aged 10-11) were obese in 2023/24, below the national average of 22.1% and regional average of 23.3%.
- Levels are higher in the South at 22.4% of children who are obese compared to 21.0% in the North.
- Obesity levels in children in the North are below the national average. Levels in the North are roughly in line with nationally.

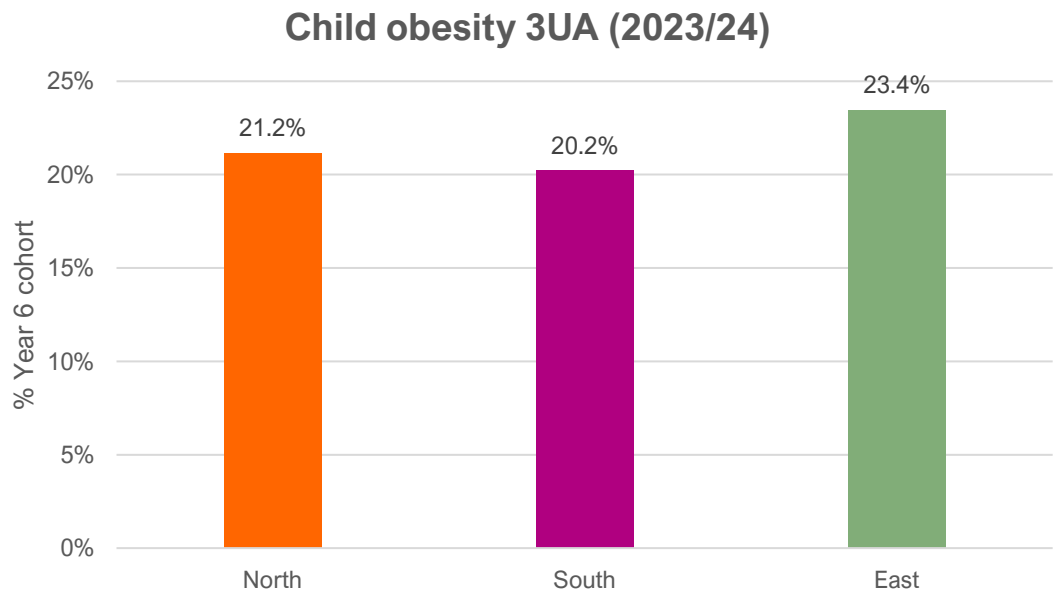


Source: Year 6 prevalence of obesity (including severe obesity), Office for Health Improvement & Disparities, 2025

Child Obesity – 3UA

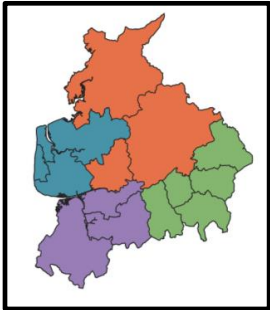


- Levels of child obesity are lowest in South, followed by the North with both South and North UAs having lower levels of child obesity than nationally and regionally.
- Levels of child obesity are highest in the East UA, slightly above the national average and in line with the regional average.

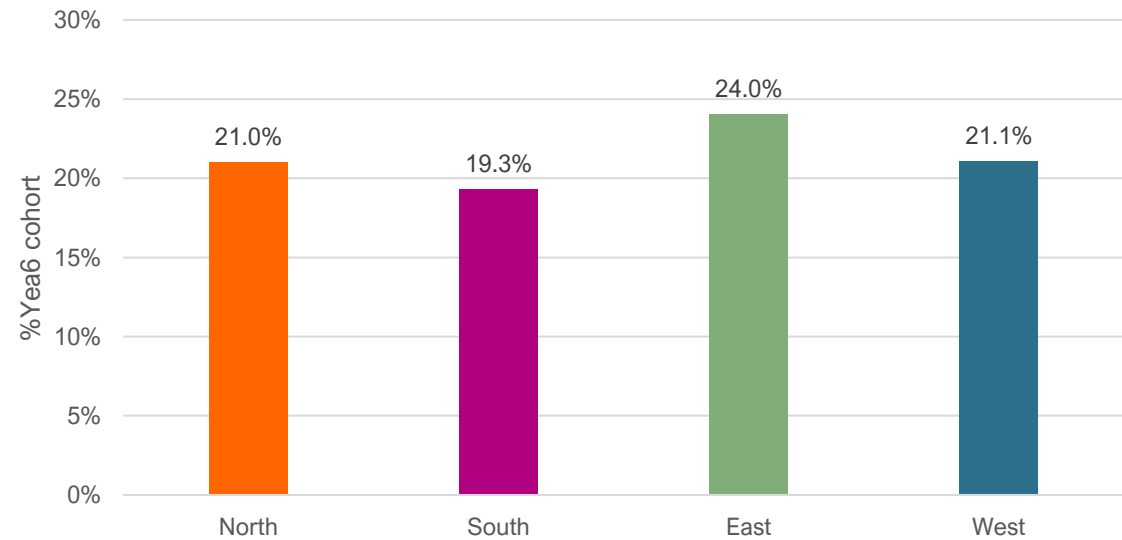


Source: Year 6 prevalence of obesity (including severe obesity), Office for Health Improvement & Disparities, 2025

Child Obesity – 4UA



Child obesity 4UA (2023/24)

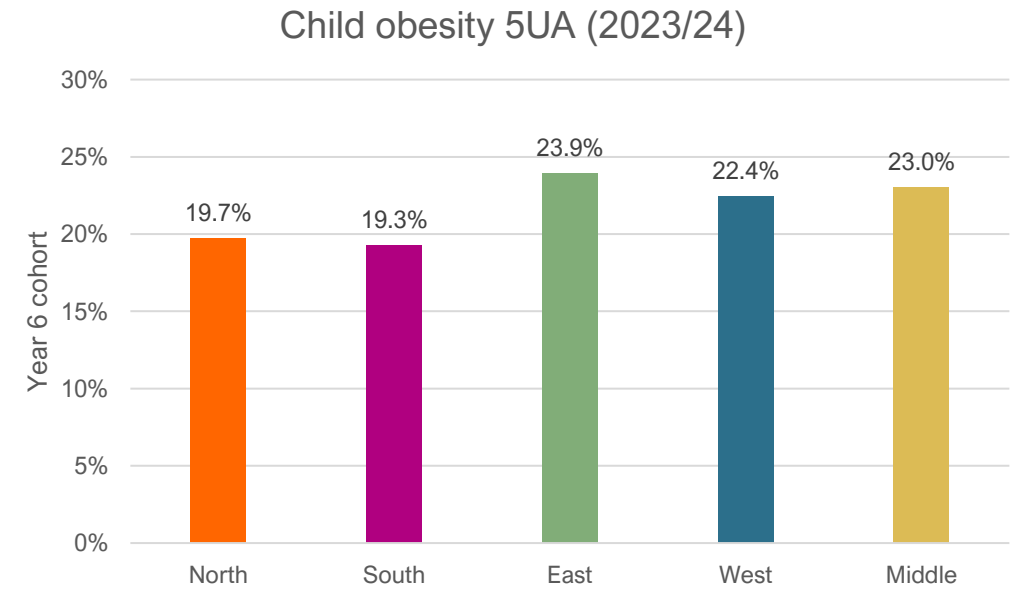


- Wide variation in child obesity levels. South and North UAs child obesity levels are lowest. West UA child obesity levels are also below nationally and regionally.
- East UA has the highest levels of child obesity which are above regional and national levels.
- The East UA in the 4UA model has the highest levels of child obesity across any UA across LGR options, along with Eats in option 5UA.

Child Obesity – 5UA

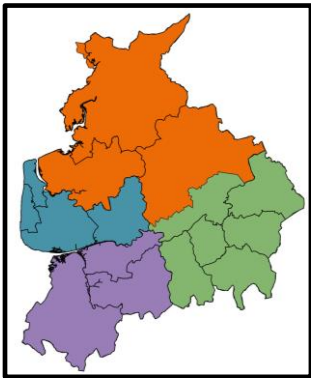


- South and North have lower child obesity levels which are below regional and national levels.
- West roughly in line with national levels but above levels in the South and North UAs.
- Middle levels above the national average and in line with the regional average.
- East has the highest levels of child obesity which are above national and regional levels.

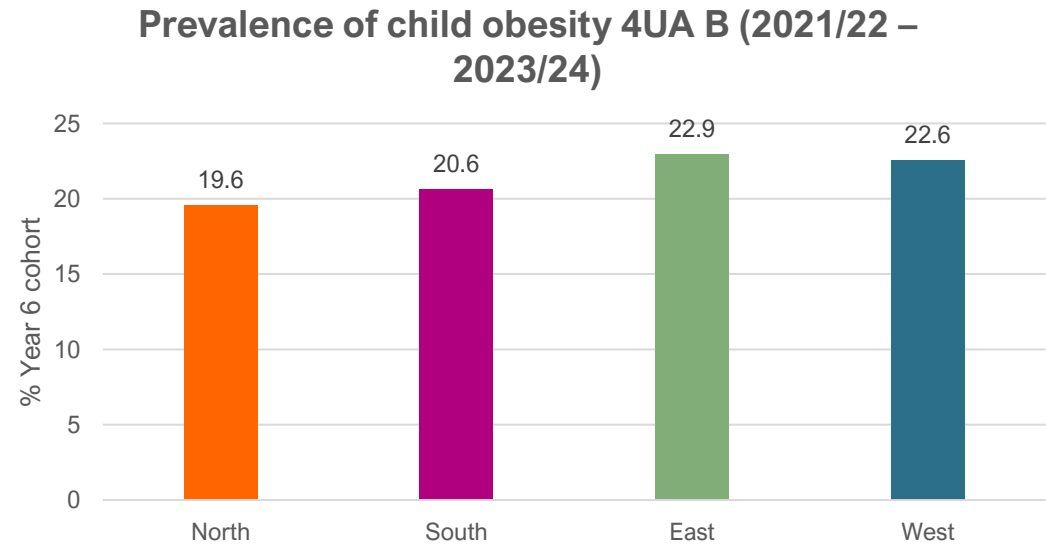


Source: Year 6 prevalence of obesity (including severe obesity), Office for Health Improvement & Disparities, 2025

Child Obesity – 4UA B

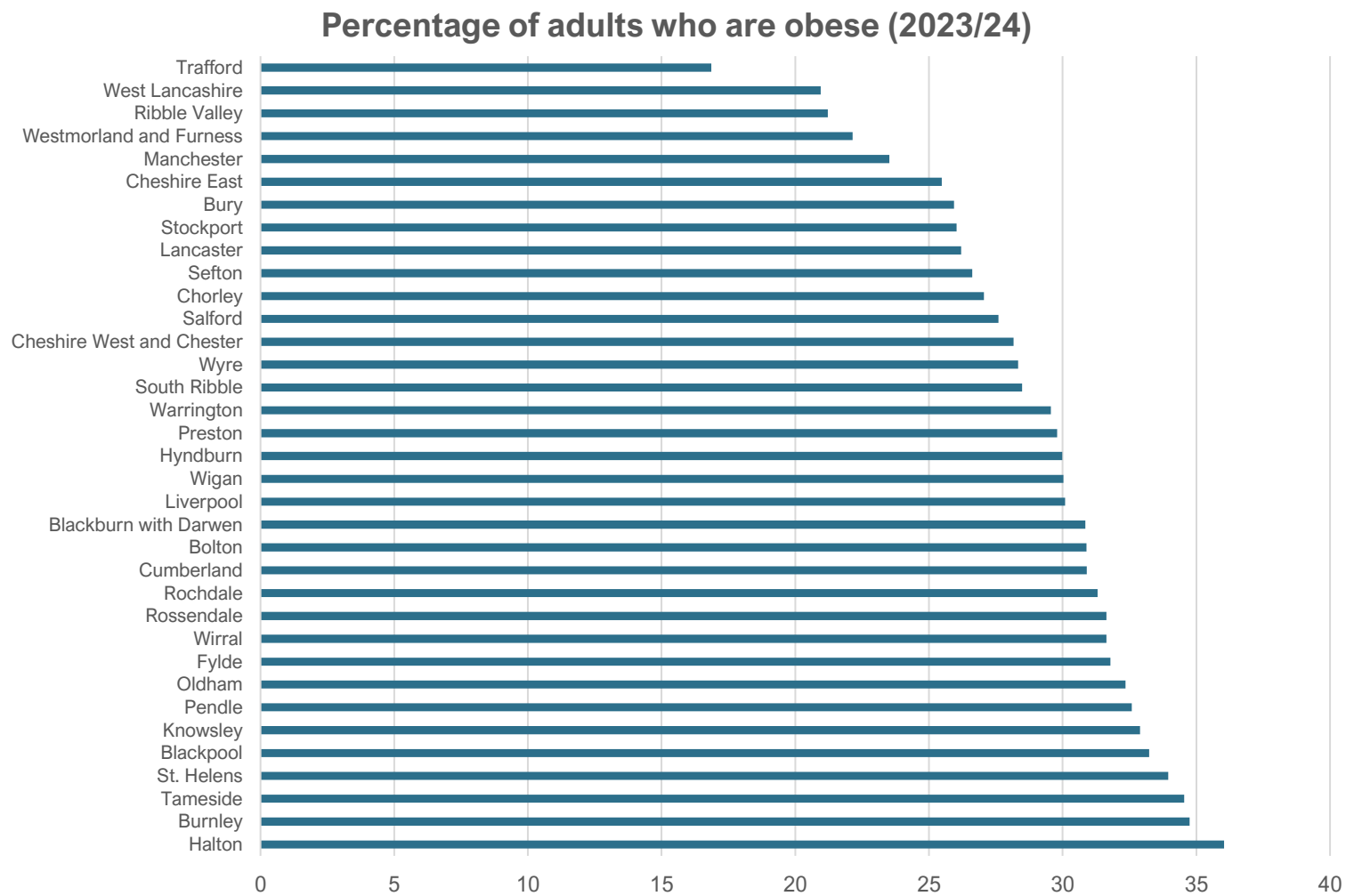


- *MSOA data takes the average of the period between 2021/22 and 2023/24.*
- North has the lowest levels of child obesity across any of the LGR options at just below a fifth of Year 6 students.
- South also has lower child obesity levels than nationally and regionally.
- East and West levels are in line with nationally.



Source: Year 6 prevalence of obesity (including severe obesity), Office for Health Improvement & Disparities, 2025

Prevalence of obesity of adults

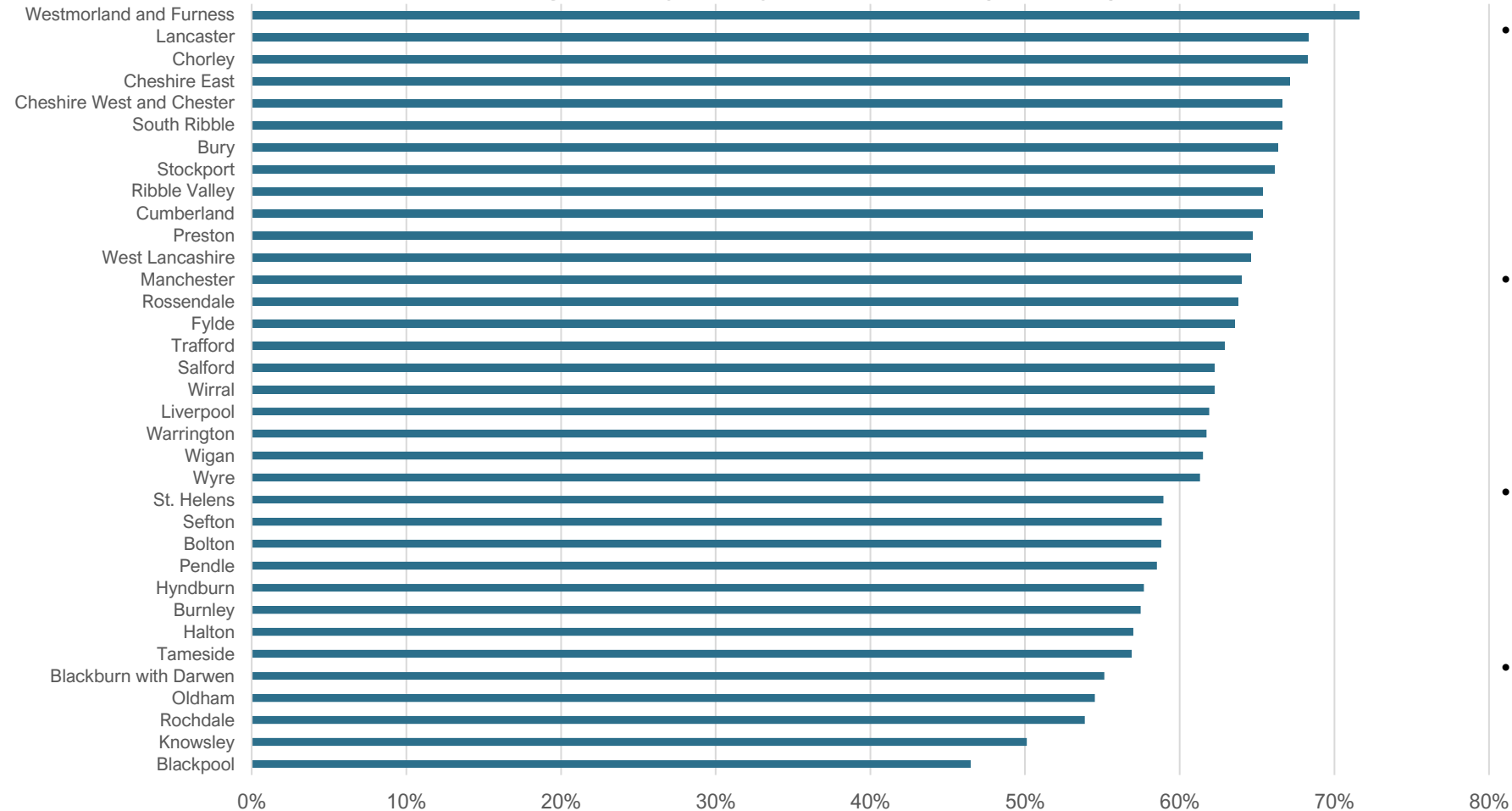


- Across Lancashire (Lancashire 12) around 28.5% of adults are obese, around the levels seen regionally but above 26.5% of adults nationally.
- Between 30% and a third of adults in Burnley, Blackpool, Pendle, Rossendale, Fylde, Blackburn, Hyndburn and Preston are obese.
- West Lancashire, Ribble Valley have some of the lowest levels of adults who are obese across the North West at around a fifth of adults.
- Ribble Valley also has low levels of child obesity.

Notes: Due to wide 95% confidence intervals, these figures have not been rag rated against either national or regional averages
Source: Percentage of adults aged 18 and over classified as living with obesity, Office for Health Improvement & Disparities, 2025

Levels of physical activity

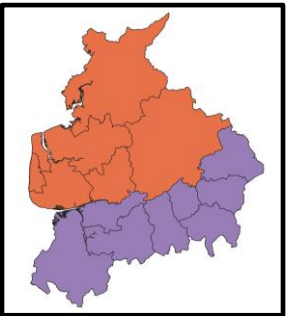
Percentage of physically active adults (2023/24)



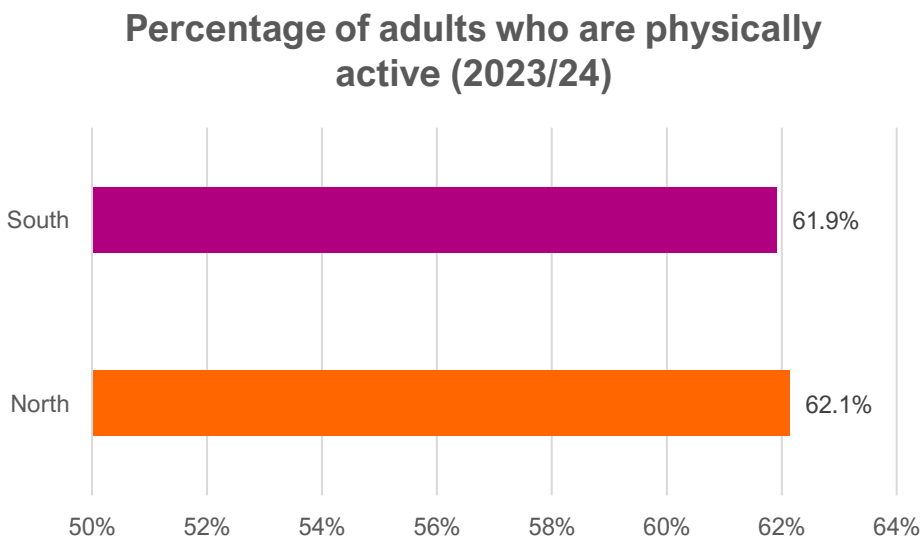
- Across Lancashire (*Active Lancashire Partnership Area covering the 12 districts and 2 unitaries*) just under two thirds of adults (61.4%), in line with the regional average (62.0%) but just below the national average (63.7%).
- Blackpool has the lowest levels adults who are physically active in the North West, less than half of adults – Blackpool also has the highest levels of adult obesity in Lancashire at almost three quarters of adults.
- Blackburn, Burnley, Hyndburn, and Pendle also have low levels of adults who are physically active all of which have high levels of adult obesity – 60% or less of adults.
- Chorley, West Lancashire, South Ribble, and Lancaster all have high levels of adults who are physically active – Chorley and South Ribble also have low levels of adult obesity.

Notes: Due to wide 95% confidence intervals, these figures have not been rag rated against either national or regional averages. Figures are taken directly from Sport England’s Active Lives Survey for 2023/24 for local authorities, and for 2022/23 for option 4B using MSOA data
Source: Active Lives Adult Survey, Sport England, 2025

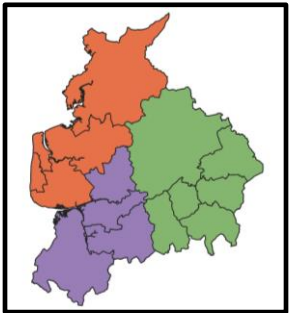
Levels of physical activity – 2UA



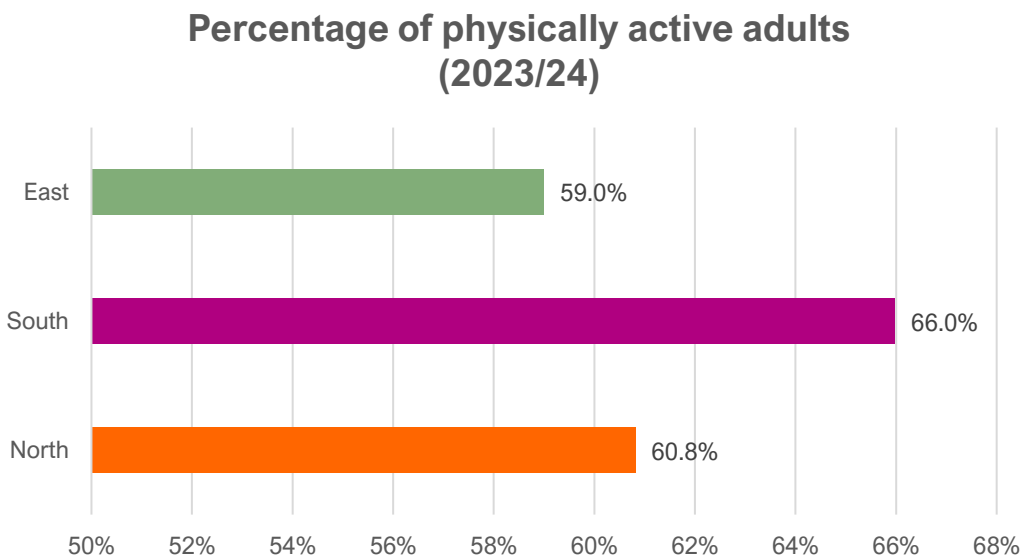
- Across Lancashire just under two thirds of adults (61.4%), in line with the regional average (62.0%) but just below the national average (63.7%).
- Both the authorities are in line with the regional average.



Levels of physical activity – 3UA



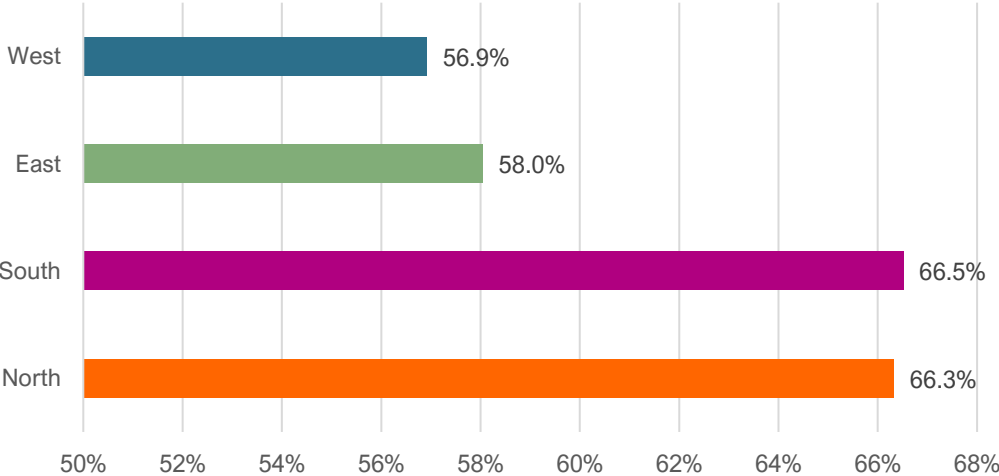
- Across Lancashire just under two thirds of adults (61.4%), in line with the regional average (62.0%) but just below the national average (63.7%).
- East and North have low levels of physical activity at around 60% of adults whereas South Lancashire 66% are physically active, above the national average.



Levels of physical activity – 4UA



Percentage of physically active adults
(2023/24)

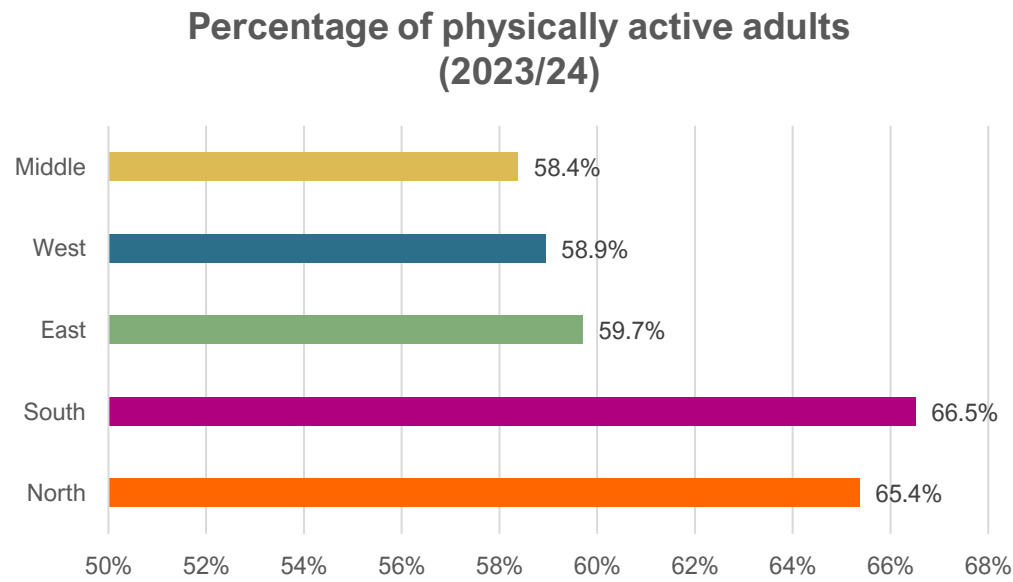


- Across Lancashire just under two thirds of adults (61.4%), in line with the regional average (62.0%) but just below the national average (63.7%).
- East and West low levels of physical activity at below 60% of adults.
- South and North have higher levels of physical activity at around two thirds of adults, above regional and national averages.

Levels of physical activity – 5UA



- Across Lancashire just under two thirds of adults (61.4%), in line with the regional average (62.0%) but just below the national average (63.7%).
- West, East and Middle less than 60% of adults are physically active.
- South around two thirds of adults are physically active/ North also has higher levels of physical activity compared to regionally and nationally.



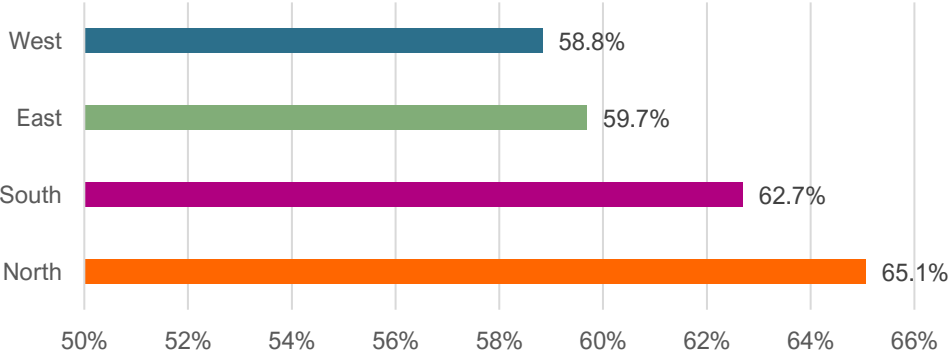
Source: Active Lives Adult Survey, Sport England, 2025

Levels of physical activity – 4UA B



- Latest MSOA data is 2022/23 which has been used to construct UA estimates for the 4UA B option.
- Levels of physical activity are lower in West and East UA at below 60% of adults.
- North almost two thirds of adults are physically active, the highest in this option, above regional and national averages.
- South around regional average levels.

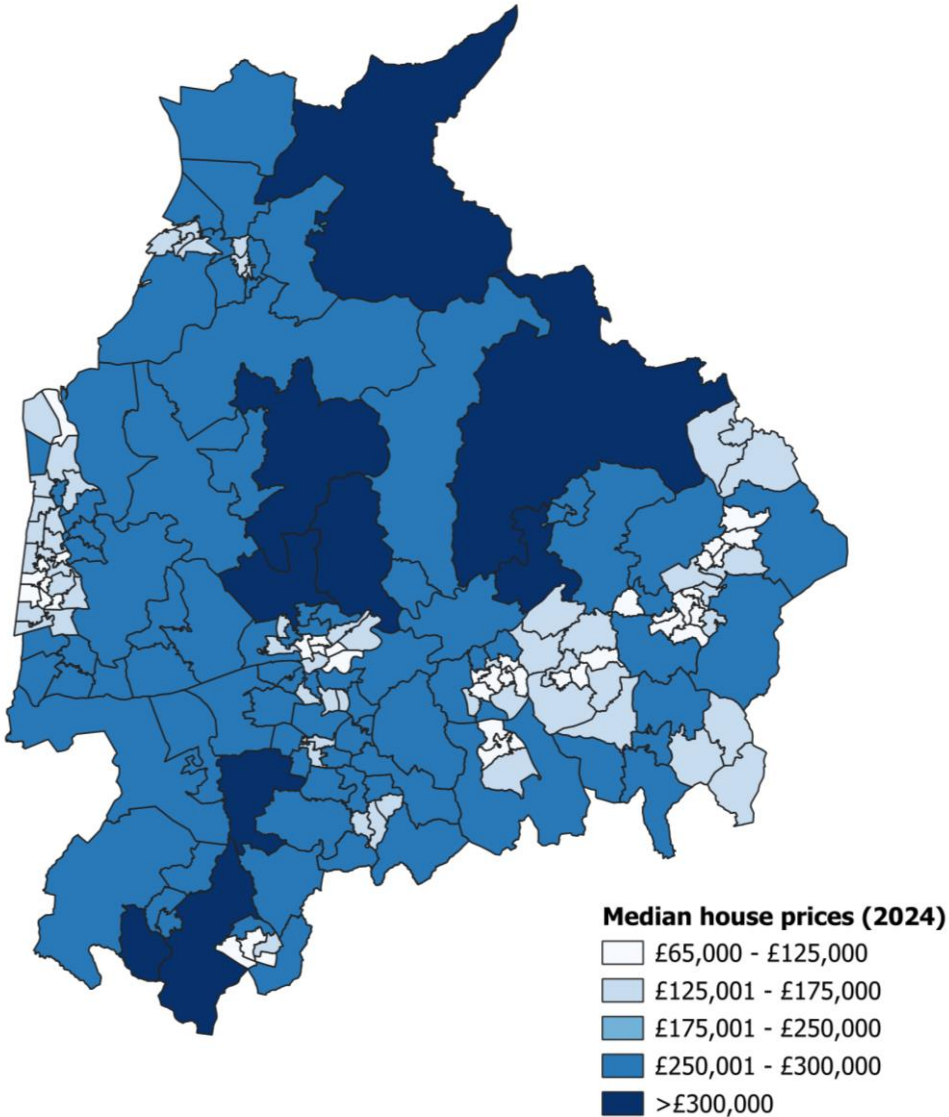
Percentage of physically active adults 4B
(2022-23)



Median house prices

Median house prices in Lancashire are £185,000, 10% below the North West average and £100,000 below the national average but there is wide variation of over £300,000 in house prices within Lancashire.

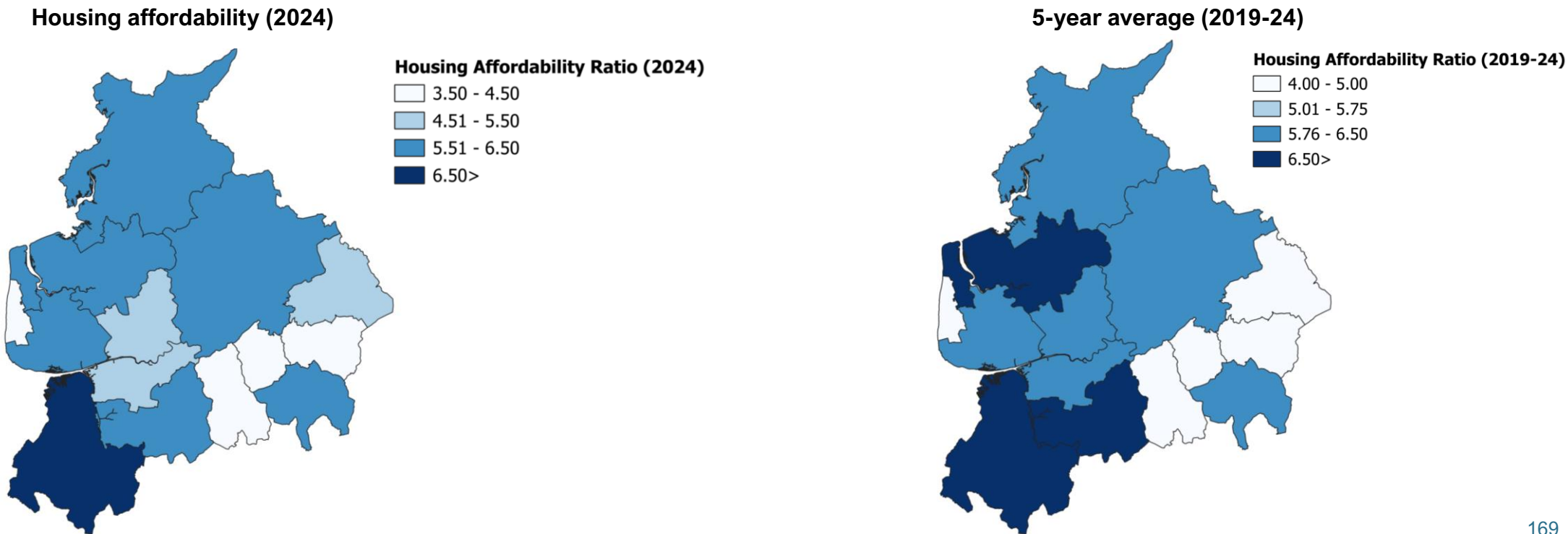
- The map to the right shows there is wide variation in house prices across Lancashire – in some areas house prices are below £100,000 including Blackpool, Fleetwood, Preston, Blackburn, and Darwen, Accrington, Colne, Burnley, and Nelson – showing strong correlation with areas of high deprivation in the Index of Multiple Deprivation.
- Two thirds of MSOAs in Lancashire have house prices below the £206,000 average across the North West, but much of Ribble Valley, West Lancashire (apart from Skelmersdale, Ormskirk and Burscough), North East of Lancaster, South Ribble and Chorley (Higher Penwortham, Longton, Bretherton, Croston, Mawdesley, Eccleston), Fylde (Lytham St Annes, Singleton, and Higer Ballam), South of Blackburn (Belmont and Edgworth) and Wyre (Eagland Hill and Calder Vale) have higher prices than £206,000.
- 8% of MSOAs have above national average prices. There is over £300,000 in difference between house prices in Central Burnley & Daneshouse, Nelson East, Queensgate, Nelson Bradley, South Promenade & Seaside Way, Bank Hall & Fulfilledge and Barclay Hill & Trinity compared to Waddington, Gisburn & Slaidburn (£380,000).



Source: Median house prices by Middle layer Super Output Area, ONS, 2025; Housing affordability in England and Wales 2024, ONS

Housing affordability

The maps show the ratio between median house prices to median annual workplace earnings. In 2024, eight of the districts had a lower housing affordability ratio compared to the 5.86 regional ratio – only West Lancashire, Chorley, Ribble Valley, and Wyre have a higher affordability ratio (Rossendale and Lancaster are around the 5.80 regional average). The 5-year average is similar – eight districts have a lower affordability ratio than the regional average of 6.28. House prices fell back somewhat between 2023 and 2024, explaining why the affordability ratio in 2024 is slightly below the 5-year average but general trends remain – much of the region has relatively affordable property using the affordability ratio but there is wide variation as shown by house prices on the previous slide.



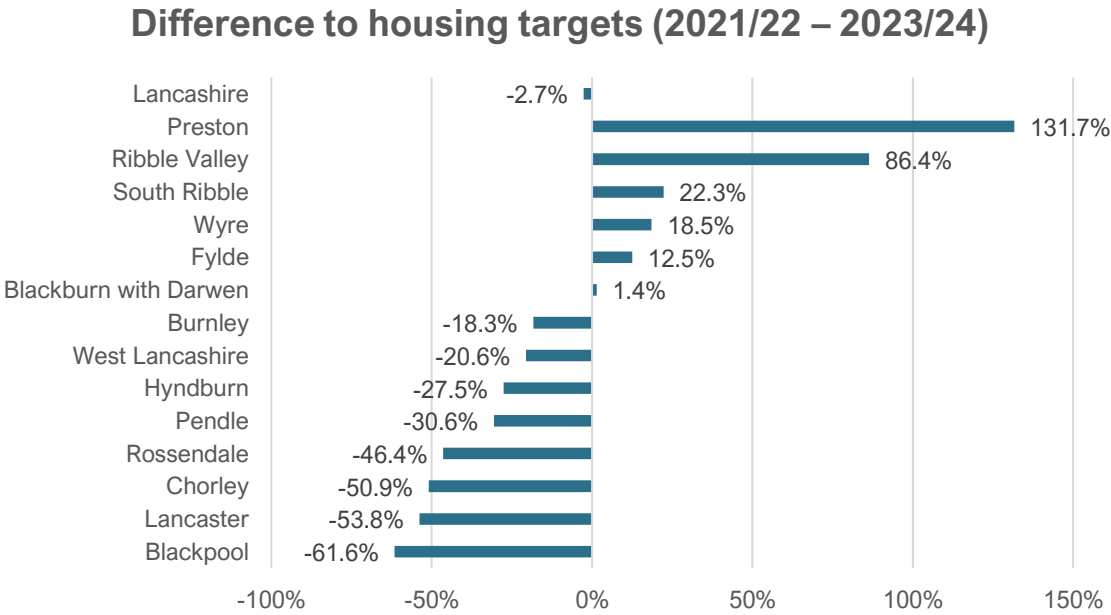
Source: House price to workplace-based earnings ratio, ONS, 2025

Housing delivery vs target levels

Although housing delivery in most districts are below target levels, across Lancashire, delivery has been within 3% of new standard method for calculating Local Housing Need (LHN) set out by MHCLG between 2021/22 – 2023/24 – strong compared to 21% below new standard method levels across the North West and 38% below nationally. Delivery at the Lancashire level has also been strong and close to new standard method levels for the most recent full year of delivery (2023/24).

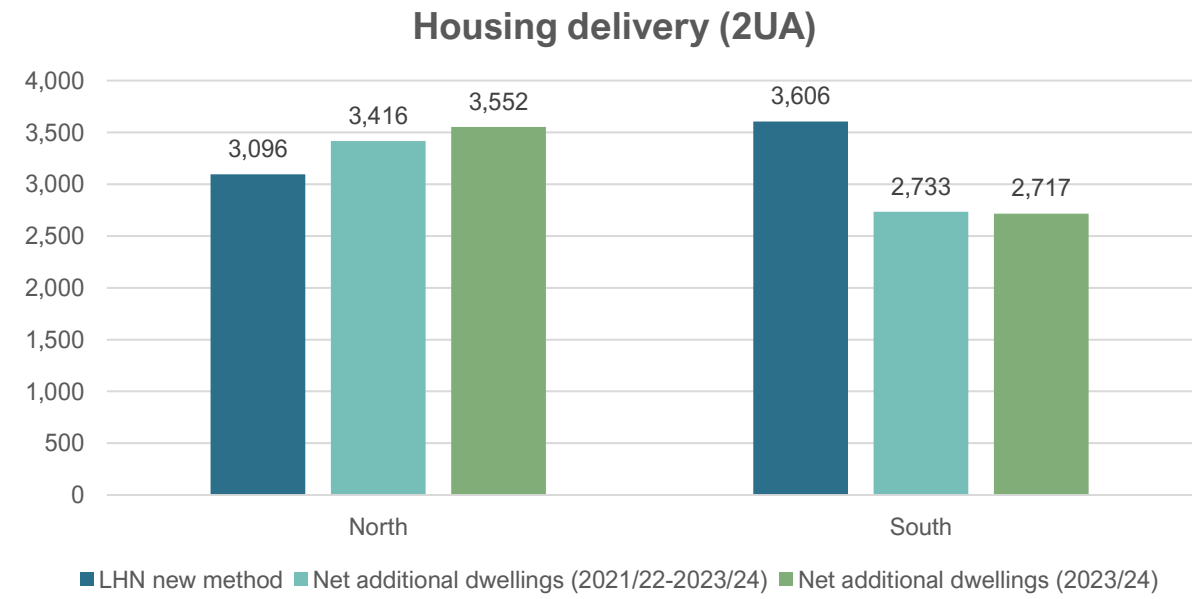
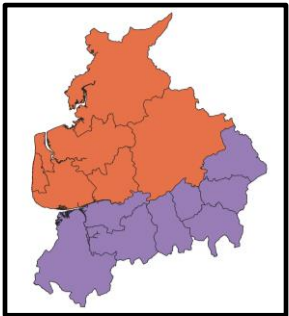
Central Lancashire is a strong source of housing delivery including Preston where housing delivery has been over double new LHN calculations and almost double in Ribble Valley, and almost a quarter above in South Ribble. Wyre and Fylde also above respective new LHN levels. However, housing delivery in some areas is considerably below new LHN levels with Blackpool, Lancaster, Chorley, and Rossendale and further away than compared to delivery targets at the national level. Delivery in Pendle, Blackpool, Lancaster, Burnley, and Fylde was relatively low in the most recent year of full data.

Area	New standard method	Average net additions (2021/22 – 2023/24)	Delivery (2023/24)
Blackburn with Darwen	506	513	547
Blackpool	585	225	175
Burnley	340	278	248
Chorley	564	277	291
Fylde	410	461	348
Hyndburn	301	218	253
Lancaster	619	286	214
Pendle	333	231	122
Preston	590	1,366	1,630
Ribble Valley	310	578	544
Rossendale	321	172	201
South Ribble	489	598	579
West Lancashire	562	446	476
Wyre	582	690	641
Lancashire	6,512	6,339	6,269



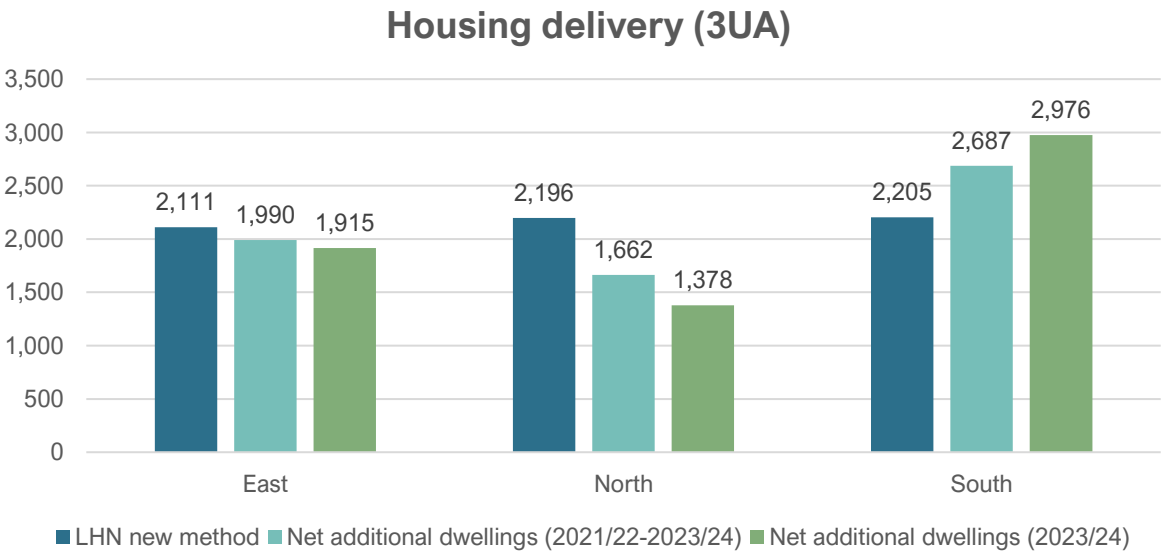
Note: those in green are 5% above target levels, those in yellow within 5% of targets, and those in red over 5% below target levels
Source: Standard Method calculations December 2024, MHCLG; Local authority data: housing supply, MHCLG, 2025.

Housing delivery – 2UA



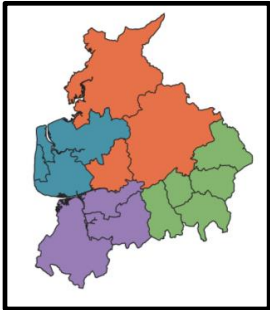
- Local Housing Need is fairly evenly split between the two proposed authorities – 52.5% in South and 47.5% in North.
- Delivery over the last few years has been concentrated in the North – average annual delivery of 3,606 accounts for 57% of total delivery in Lancashire. This remains the case for the most recent year of full delivery.
- North is also above its respective new standard method levels to calculate LHN by 16% whereas delivery in the South is 20% LHN between 2021/22 – 2023/24.

Housing delivery – 3UA

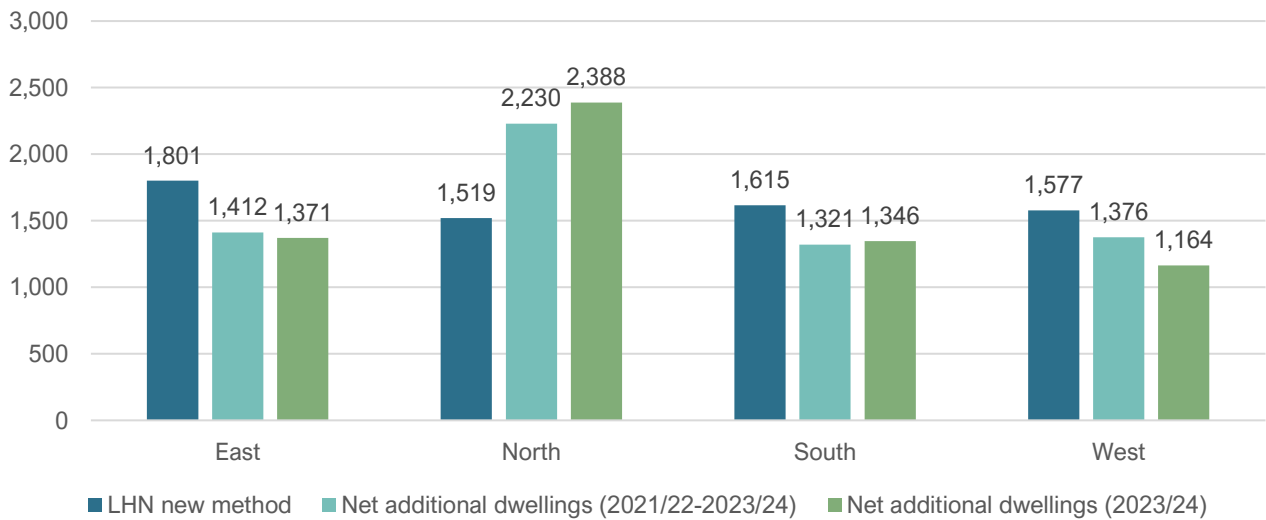


- Local Housing Need is fairly evenly split between the three proposed authorities, all around a third of housing need in Lancashire.
- However, delivery over recent years has been more concentrated in South Lancashire, which contributed 42% of net additional dwellings between 2021/22 – 2023/24, rising to 48% of delivery for the most recent full year of data (2023/24)
- North has the lowest proportion of delivery, 26% between 2021/22 – 2023/24 dropping to 22% in 2023/24.
- Delivery compared to respective new LHN:
 - South performs strongly with delivery 22% above LHN levels
 - East which has contributed just under a third of housing delivery over recent years, is slightly below its LHN levels by 6%
 - North is almost a quarter below its LHN levels between 2021/22 – 2023/24, rising to over a third below targets for 2023/24.

Housing delivery – 4UA



Housing delivery (4UA)



- Local Housing Need fairly evenly spilt between the four proposed authorities, with East Lancashire having the highest LHN accounting for 28% of the Lancashire total.
- Delivery has been less evenly split – North has contributed 35% of net additional dwellings between 2021/22 – 2023/24, with this rising to 38% in 2023/24. East, South, and West contribute around the same to housing delivery between 2021/22 – 2023/24, but delivery over the most recent year has dropped in the West to 19% of total delivery in Lancashire.
- Delivery in North is particularly strong – almost 50% above new LHN levels between 2021/22 – 2023/24 and rising to 57% above in 2023/24.
- Whereas delivery for the other proposed authorities is lower than respective LHN levels by between 13% in the West to 22% in the East between 2021/22 – 2023/24. Delivery in West has fallen to a quarter below LHN levels in 2023/24.

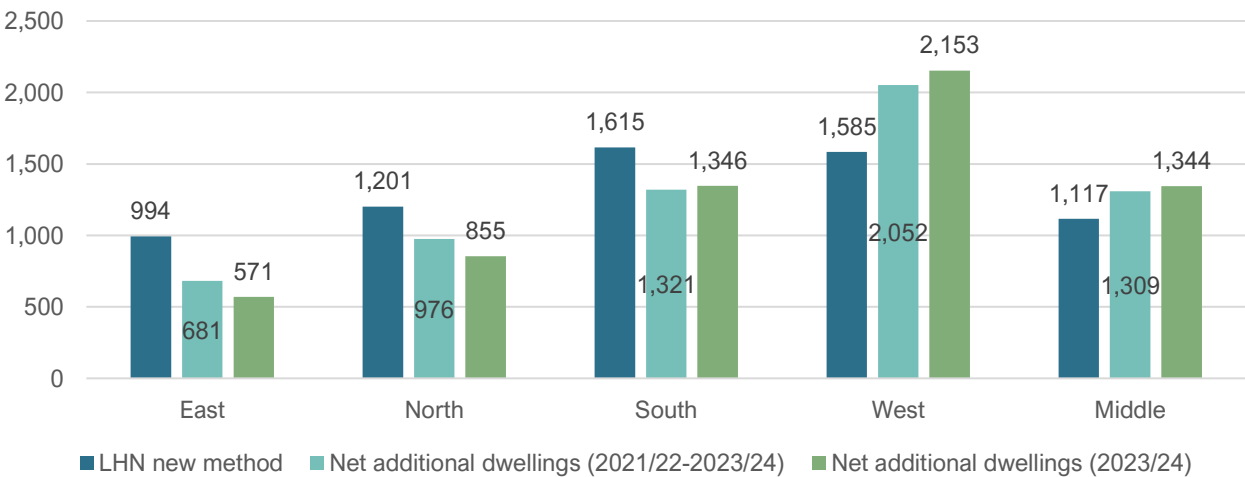
Source: Standard Method calculations December 2024, MHCLG; Local authority data: housing supply, MHCLG, 2025.

Housing delivery – 5UA



- South and East both account for a quarter of LHN, with East, Middle, and North contributing between 15-18%.
- Housing delivery is not spilt in a similar way to LHN. West contributed 32% of net additional dwellings in Lancashire between 2021/22 – 2023/24 rising to 34% in 2023/24. Middle contributes 21% of total housing delivery between 2021/22 and 2023/24, above its 17% of LHN.
- South contributes around 21% of total housing delivery, slightly below its 25% of LHN. North contributed 15% of housing delivery between 2021/22 – 2023/24, below its 18% of LHN. East has the lowest proportion of housing delivery – 11% between 2021/22 – 2023/24 falling to 9% in 2023/24 – this is below its 15% of LHN.
- Delivery is strong in West and Middle – 29% and 17% above LHN levels respectively between 2021/22 – 2023/24 rising to 36% and 20% in 2023/24. Whereas delivery is between 18%-31% below LHN levels in the remaining authorities, furthest below new LHN levels in the East, where delivery in 2023/24 is 43% below new LHN levels.

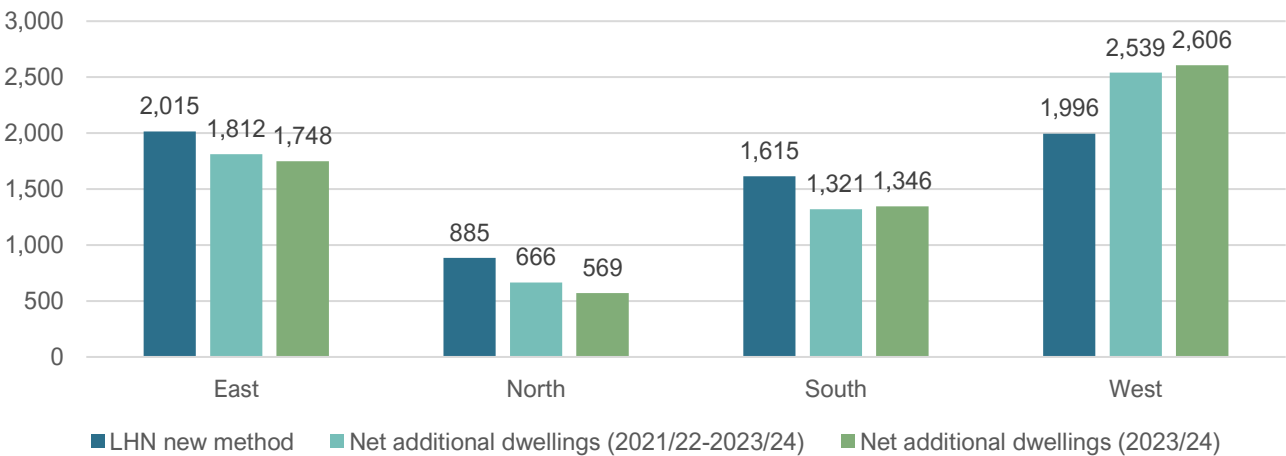
Housing delivery (5UA)



Housing delivery – 4UA B



Housing delivery (4UA B)



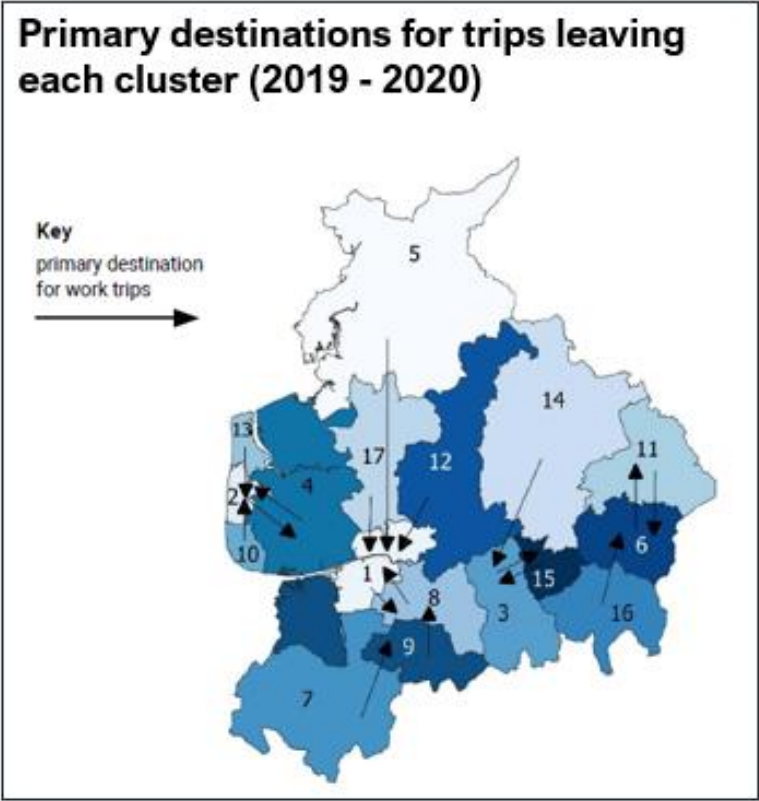
- LHN split fairly evenly between East, West, and North of between 25%-31%. Combined these UAs make up 86% of LHN.
- Delivery has been more concentrated than LHN, particularly in the West which has contributed 40% of delivery between 2021/22 – 2023/24, rising to 42% over the most recent year of delivery. West has exceeded its LHN levels by 27% between 2021/22 – 2023/24.
- East has contributed 29% of delivery between 2021/22 – 2023/24, slightly below its new LHN share of 31%. As such delivery is 13% below its LHN by 27% between 2021/22 – 2023/24.
- South has contributed 21% of delivery between 2021/22 – 2023/24, below its 25% share of LHN. Delivery is 17% below its LHN by 27% between 2021/22 – 2023/24.
- North has contributed 10.5% of delivery between 2021/22 – 2023/24, below its 14% share of LHN. Delivery is over a third below its LHN by 27% between 2021/22 – 2023/24.

Note: The lowest level of geography for housing delivery estimates is at a district level. To proxy we have taken the proportion of households in North and South Ribble Valley within Ribble Valley and multiplied this by LHN and delivery figures for Ribble Valley to get estimates for North and South Ribble Valley. The same process was followed to get LHN and delivery estimates for Rural and Urban Wyre. These estimates were then summed with the remaining 12 districts to get UA estimates.

Source: Standard Method calculations December 2024, MHCLG; Local authority data: housing supply, MHCLG, 2025; ONS Census 2021

Economic geography, infrastructure and connectivity

Work commuting



The Lancashire Independent Economic Review (2021) employed a data-driven method to analyse work-related travel patterns across the county, focusing on changes caused by the Covid-19 pandemic through mobile phone tracking data. By comparing district-level information from June 2019 to June 2020, a period when restrictions were easing, the study highlights notable alterations in commuting behaviours.

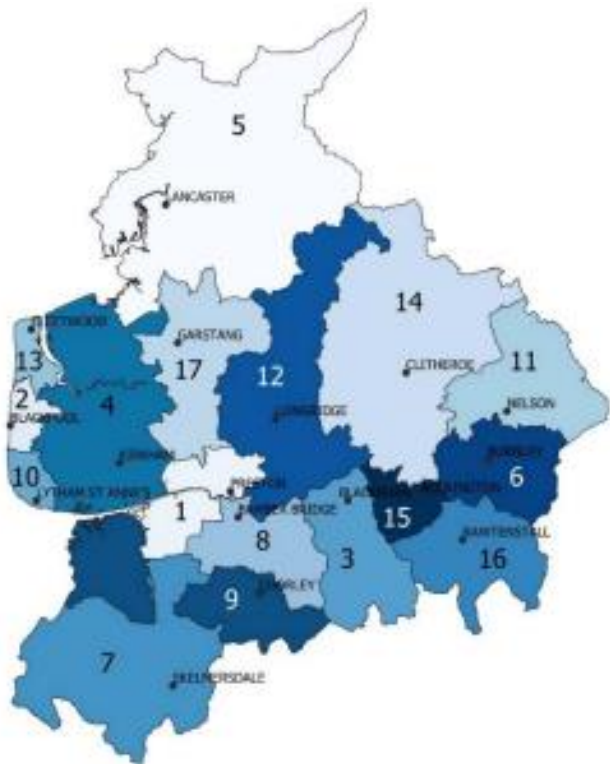
The report presents a new correlation clustering algorithm that groups neighbourhoods based on similar worker destinations. This technique reveals 17 economic clusters within Lancashire, with the largest centred on Preston, followed by significant clusters in Blackpool, Blackburn, BAE Warton, Lancaster, and Burnley.

These clusters, and the number of them, reflect the fact that most trips for work purposes made in Lancashire tend to be fairly short and local, based around a local centre. They underscore the polycentric nature of Lancashire’s economy – though not every centre is equal in terms of the amount of work trips it receives.

The cluster which includes Preston has the highest number of neighbourhoods in it (21), and received close to a million work trips in June 2019. Kirkham appears to be surprisingly high up the list, but this cluster includes the BAE base at Warton, reflecting the large influence that BAE has on commuting in Lancashire (the neighbourhoods containing Samlesbury also receive some of the most trips). The (economically) smallest cluster is cluster 17, which only contains three neighbourhoods, centred around Garstang.

Economic clusters in Lancashire

There are 17 economic clusters identified, and these are ordered according to the number of trips they receive. Preston is the largest economic cluster in Lancashire, with Garstang the smallest by number of trips received.



Cluster	Largest settlement	Constituent neighbourhoods	Trips received (June 2019)
1	Preston	21	956,495
2	Blackpool	15	872,903
3	Blackburn	18	749,907
4	Kirkham	9	670,659
5	Lancaster	18	610,620
6	Burnley	13	528,847
7	Skelmersdale	14	494,379
8	Bamber Bridge	14	445,818
9	Chorley	11	364,385
10	Lytham St Anne's	7	353,611
11	Nelson	12	331,502
12	Longridge	5	329,915
13	Fleetwood	9	306,632
14	Clitheroe	7	233,580
15	Accrington	7	221,118
16	Rawtenstall	8	220,748
17	Garstang	3	155,440

Share of trips received

The following slide breaks down the share of trips received across UAs in each of the LGR options. This is calculated depending on where each of the 17 clusters are located across the different LGR options.

For example, Lancaster is located in the North across all different LGR options and as such the number of trips received in Lancaster goes towards the total for the North UA across options. Whereas Preston is located in different UAs across options. In the 2UA and 4UA options, Preston is located in the North so the number of trips received in Preston goes towards the total for the North UA but in the 3UA option, Preston is located in the South, and in the 5UA and 4UA B options, in the West, and as such will go towards the South and West UAs respectively.

The 3UA option has the least variation between the number of trips received across UAs and the 5UA option has the least variation in the number of economic clusters within each of the prospective UAs.

Share of trips received

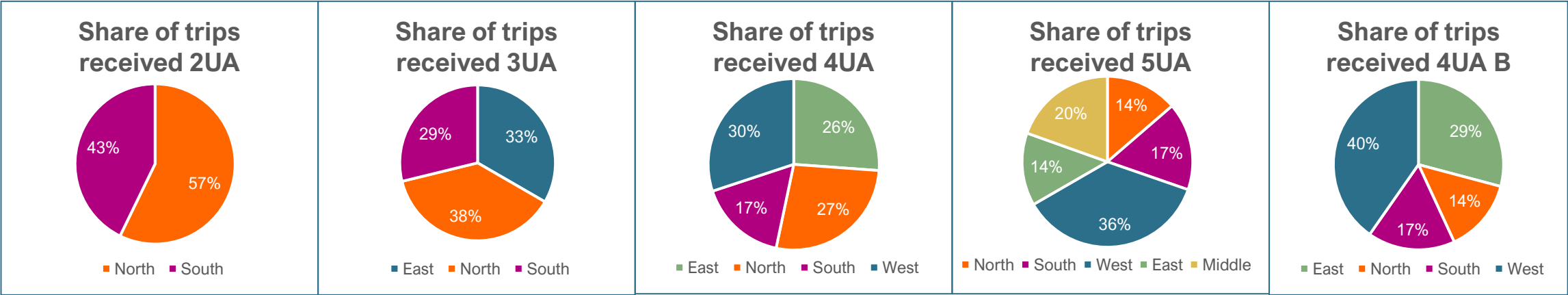
2UA: North has 9 of the identified economic clusters including four of the largest five by trips received (Preston, Blackpool, Kirkham and Lancaster) – North receives 57% of trips compared to 43% in the South.

3UA: a fairly even split in trips received especially compared to other options with North receiving just over a third and South just under 30%. East has most of the clusters (7) followed by North (6) and then South (4). North has three of the top five areas in terms of total trips received (Blackpool, Kirkham and Lancaster).

4UA: less variation in total number of clusters with five in East and West, four in North, and three in South but more variation in share of trips received with West UA receiving most at 30% compared with only 17% in South with least number of identified clusters.

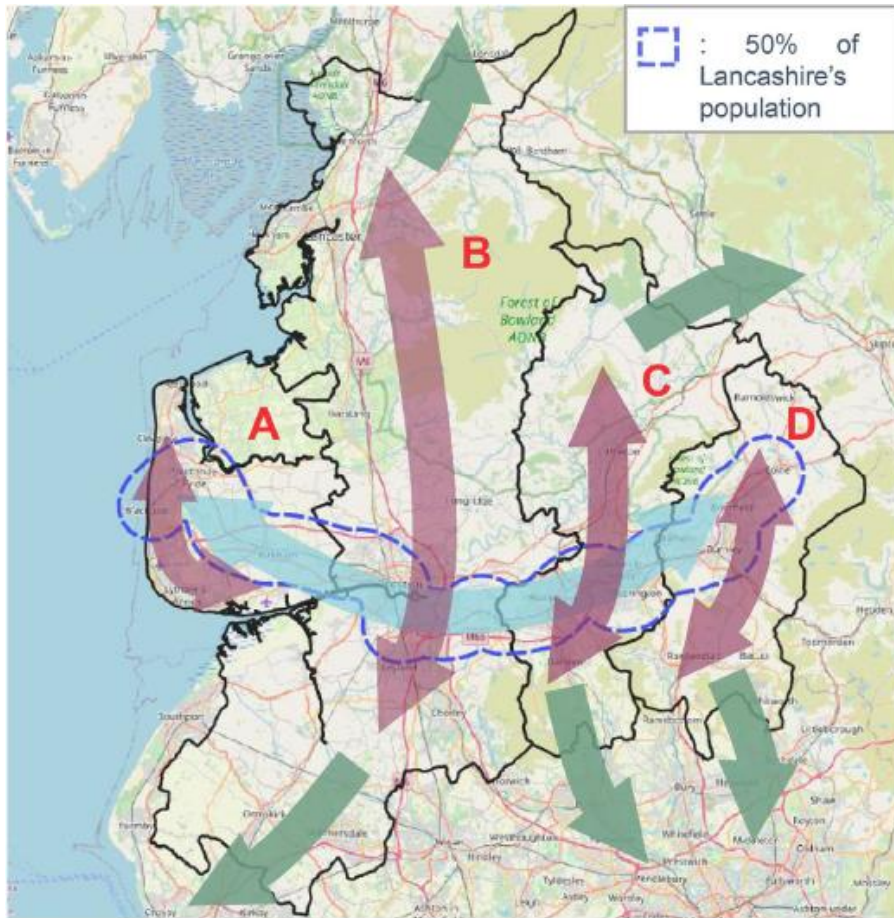
5UA: either three of four clusters in each UA but wide variation in the share of trips received from over a third in West to 14% in North and East and only up to 20% in second highest Middle UA. West has three of top five clusters (Preston, Kirkham and Blackpool) helping to explain why it received a much higher share of trips than other UAs.

4UA B: East (6) and West (5) have more clusters than North (3) and South (3) reflecting higher shares of population. West and East combined account for over two thirds of trips received including 40% in West (which includes three of top five clusters in Preston, Blackpool and Kirkham) to 17% in North (Lancaster fifth biggest cluster) and 14% in South.



Source: Lancashire Independent Economic Review (2021)

Economic relationships in Lancashire



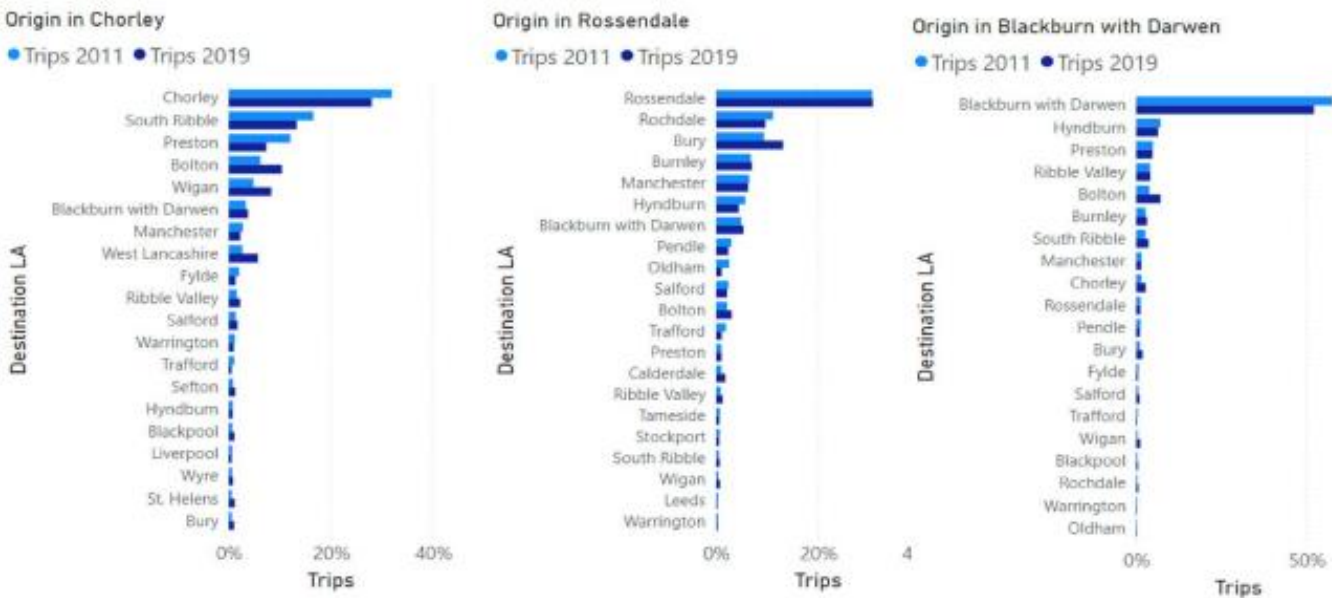
Four economic corridors in Lancashire set out in the Lancashire Independent Economic Review – these have been formed according to where each area send most trips to, each anchored by a large town:

Across these (shown in blue) is the main population band, though trips on this axis are less significant than north-south trips. Green arrows shows trips across borders into surrounding major geographies.

- The first of these corridors (A) is the Fylde Coast. Trips primarily take place along a coastal axis North-South linking Fleetwood, Blackpool, Lytham St Anne's, and Warton Aerodrome.
- The second corridor (B) is the M6 and West Coast mainline corridor. It is by some way the largest corridor, and links North-South from Skelmersdale to Carnforth, via Chorley, Leyland, Preston Garstang, Lancaster, and Morecambe.
- The third corridor (C) connects North-South from Darwen to Clitheroe (and up into rural Ribble Valley) via Blackburn and Accrington.
- The fourth corridor (D) links North-South from Rawtenstall up to Barnoldswick, via Burnley, Nelson, and Colne.

Work commuting – Greater Manchester

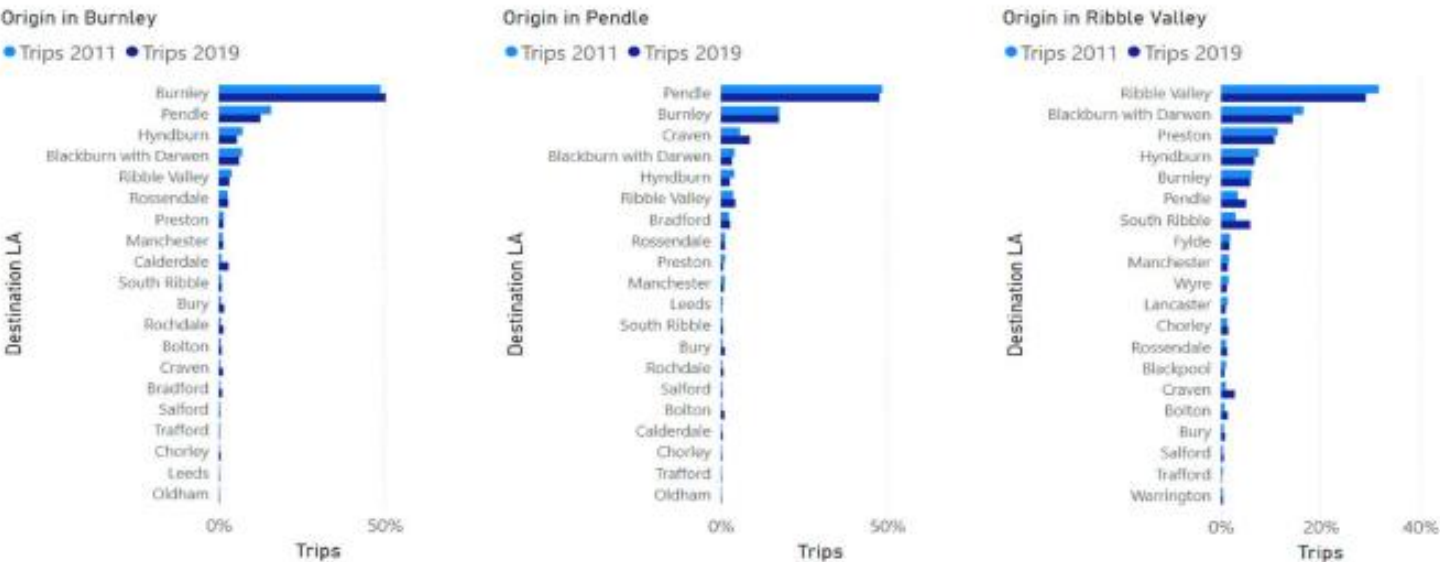
Figure 3. Outward work trips from Chorley, Rossendale, and Blackburn with Darwen



- The charts show outwards outflows from Blackburn with Darwen, Rossendale and Chorley. Across these authorities, which all lie on the southern border of Lancashire, commuting levels to boroughs of Greater Manchester have increased.
- This is clearest in Chorley, with trips to Bolton and Wigan almost doubling since 2011, representing 10% and 8% of total work trips, respectively.
- While Chorley has seen the strongest growth in commuting to Greater Manchester, Rossendale has the highest overall levels, with three of its top five destinations in Greater Manchester.

Work commuting – Pennines

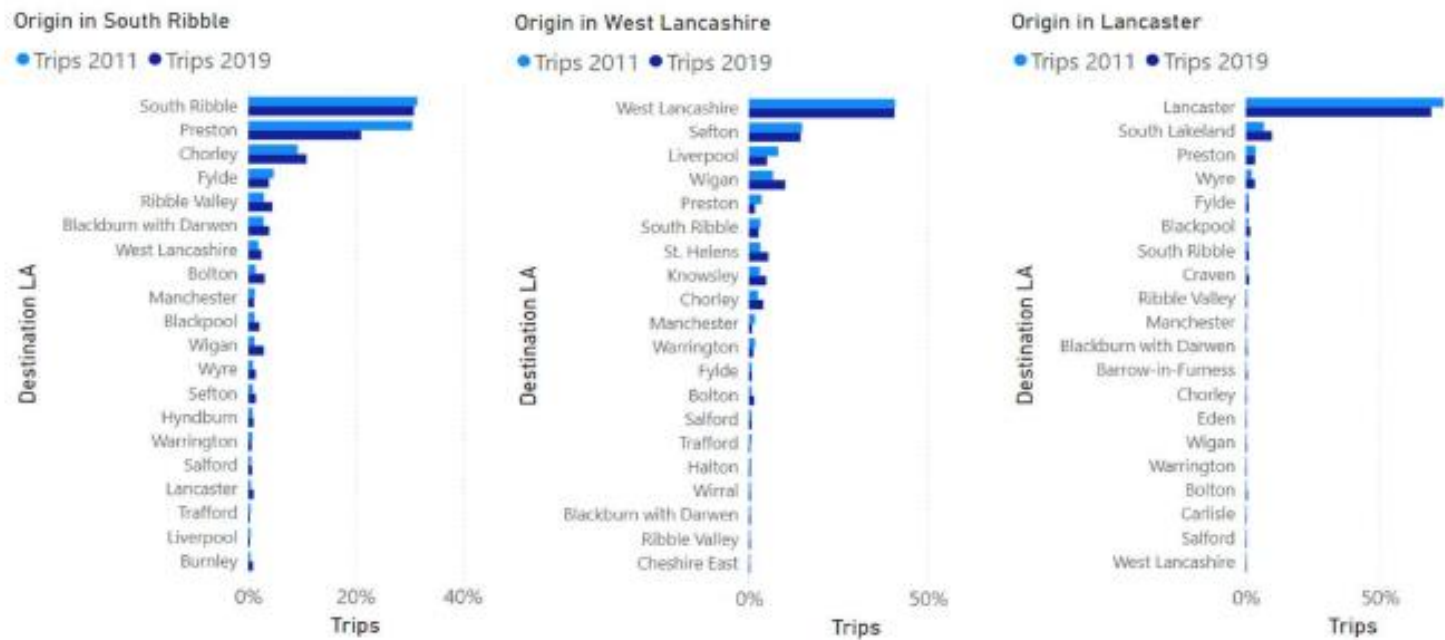
Figure 4. Outward work trips from Burnley, Pendle, and Ribble Valley



- The charts show outward trips from Burnley, Pendle and Ribble Valley, on the Eastern edge of Lancashire.
- In Burnley, linkages with Pendle appear to have weakened slightly since the last census, with a fall in trips by 4% (though still representing the top destination for residents). Some of these outwards trips have been absorbed by Calderdale and Craven, now making up just under 5% of total trips.
- Similar to Burnley, a greater number of Pendle residents are travelling out to Craven, where the authority now represents 9% of total outward trips, establishing it as the second most travelled to place outside of the authority.
- The number of trips we see here are relatively small relatively to what we might expect given the proximity of North and West Yorkshire to East Lancashire. This is likely a symptom of inadequate transport links making travelling to work in Yorkshire.

Work commuting – outside Lancashire

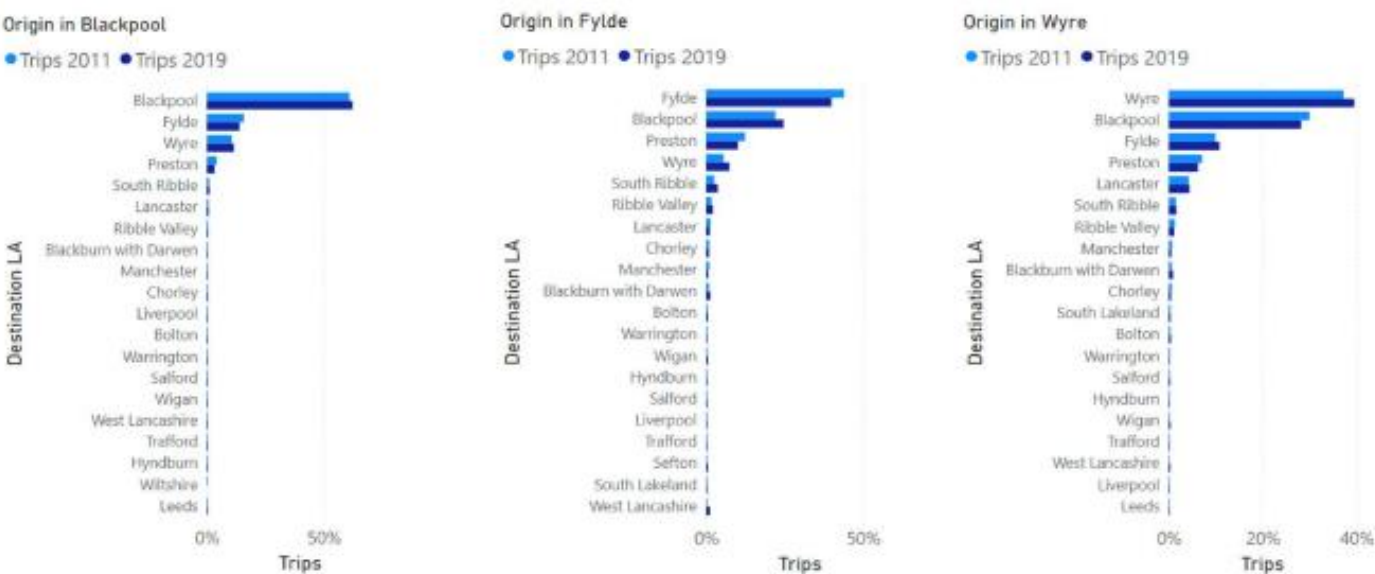
Figure 5. Outward work trips from South Ribble, West Lancashire, and Lancaster



- In South Ribble, there is a growing bond with Greater Manchester. Trips out to Bolton have trebled and to Wigan have doubled, where they make up a combined 6% of total trips. Preston remains the most travelled to destination but has become a less significant centre of employment for the authority, with trips falling by 10%.
- West Lancashire, which in 2011 already had fairly weak links into the rest of Lancashire, has continued to build its external connections most notably Liverpool City Region.
- Lancaster is the most self-contained district in Lancashire for work trips, with just under 70% of residents commuting within its boundaries (though this is lower than in 2011). It is also the only authority within the analysis that has a distinct commuting relationship with South Lakeland in Cumbria.

Work commuting – Fylde Coast

Figure 6. Outward work trips from South Ribble, West Lancashire, and Lancaster



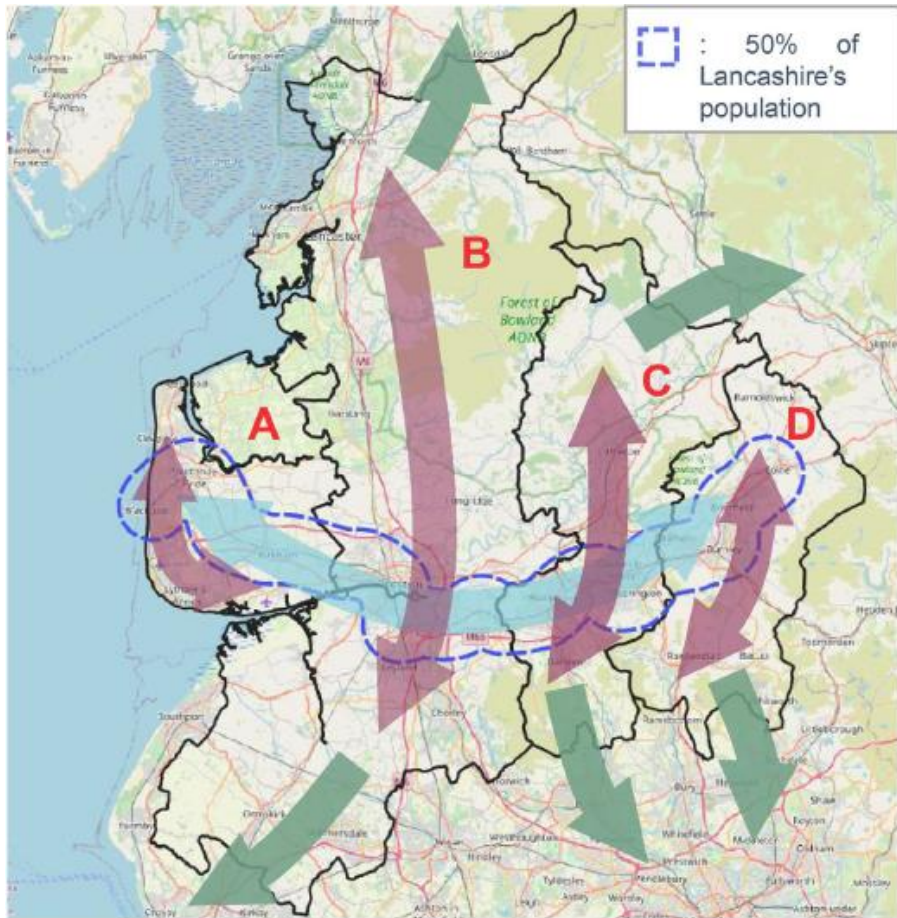
- The Fylde Coast remains a very tight economic area, with each authority in each other's top three destinations.
- Blackpool had a highly localised labour market in 2011, and in 2019, 62% of work trips originating in Blackpool terminated there. The analysis reveals that there is a reshaping in the composition of flows from Blackpool to other parts of the Fylde Coast, with more residents travelling out to Wyre (11.6% of total trips) and fewer out to Fylde (14% of total trips) between 2011-2019.
- Residents in Fylde have increased their work travel to Blackpool, while in Wyre this has dropped back slightly.
- This presents a highly localised economy. Interestingly, the deepening of connections within the Fylde Coast has been at the expense of movement into Preston, with trips to Preston declining for each of the districts that make up the Fylde Coast.

Commuting patterns across Lancashire



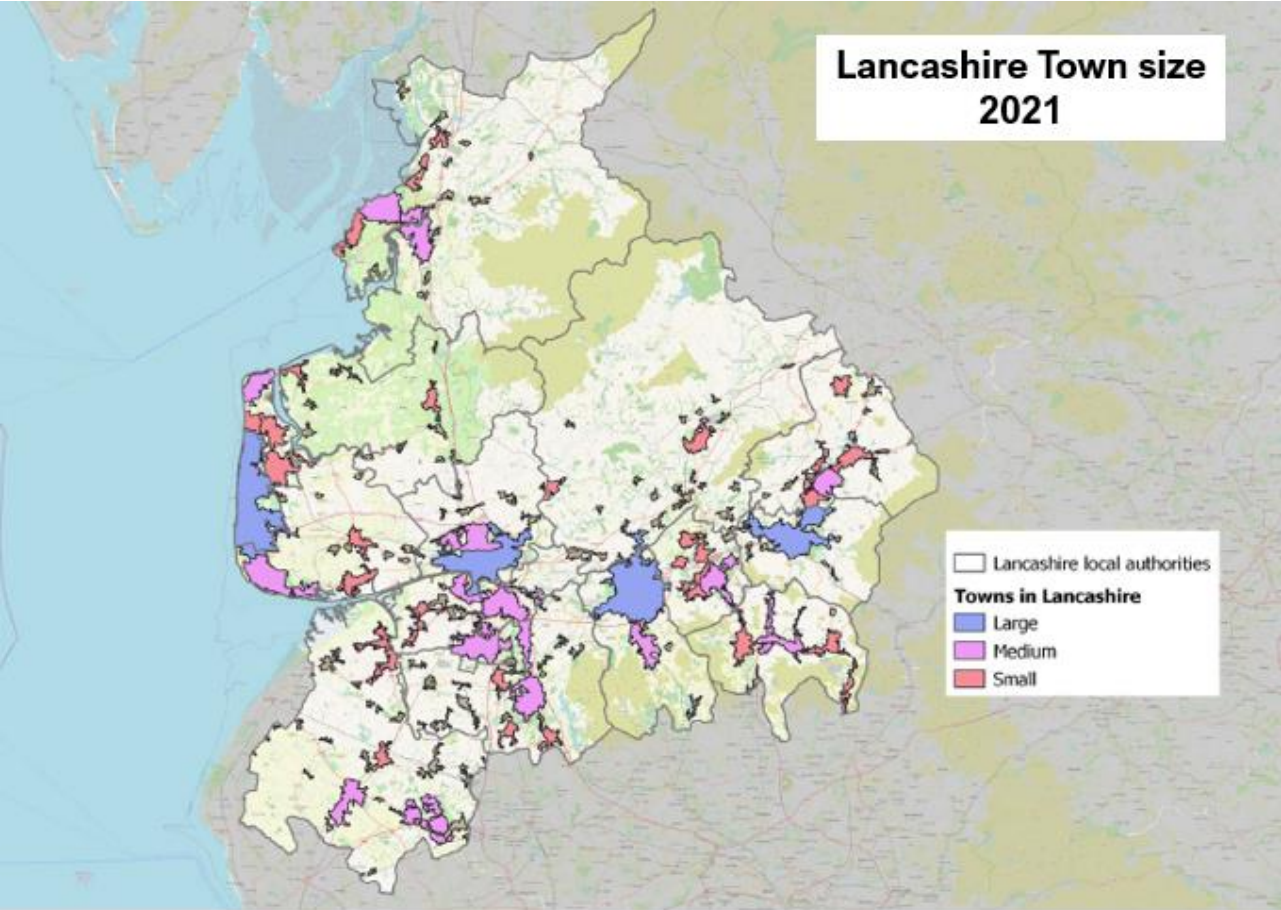
- The seventeen clusters (slide 178) identified represent local areas with highly correlated travel patterns. These reflect the fact that most people do not tend to travel especially far for work purposes – Lancashire isn't an area like Greater Manchester or London where there is a large commuter belt all heading to a concentrated work area. 60% of all home-work trips identified in the data began and ended in the same cluster – they also underscore the polycentric nature of Lancashire's economy.
- The four corridors (slide 181) connect up the clusters to the destinations they send most trips to. 84% of all home-work trips begin and end in the same corridor.
- As a whole, Lancashire remains fairly self-contained – only 16% of trips which originate in Lancashire leave Lancashire.
- However, the evidence of the mobile data shows that Lancashire is seeing increasing trips to areas beyond its borders. The proportion of trips going to Greater Manchester, the Liverpool City Region, Yorkshire, and Cumbria have all increased over the last decade. These changes are indications of a change in direction – but these things only move gradually, and Lancastrians still primarily look within their county for work.
- Preston remains a major centre for work (in the top five destinations for ten out of fourteen districts). However, as many of the examples above show, it has become relatively less important as a work destination for many districts. This effect tends to be fairly minor, though in Chorley it has been more significant, with trips out to Preston as proportion of the total falling from 12.1% in 2011 to 7.4% in 2019. This suggests the Lancashire economy hasn't been centralising around its largest employment area, but the economy very much retains its polycentric nature.

Travel challenges



- There is one clear challenge in Lancashire which is East-West connectivity: the central population belt from Blackpool to Colne. The dashed blue line shows where half of Lancashire's population live, and the red arrow highlights movement along this corridor. The four largest towns in Lancashire – Blackpool, Preston, Blackburn, and Burnley – all lie along this stretch.
- However, while this is a population corridor, the evidence from the mobile data suggests that the strongest flows are not along this movement corridor. There are two probable causes of this:
 - Motorway connectivity on the M65 is dual carriageway in some sections, with congestion around junctions at peak times, adding to the “cost” of travelling on this corridor
 - Rail links from Preston to Colne are slow, with unelectrified rail and lower quality rolling stock

Towns



The LIER 2021 firstly mapped the size of towns across Lancashire by using ONS definitions, with small towns being defined as those with 5,000-20,000 people, medium as 20,000-75,000 people, and large as above 75,000 people.

Large (75,000 - 225,000 population)

Blackburn	Burnley
Blackpool	Preston

Medium (20,000 - 75,000 population)

Accrington	Darwen	Lancaster	Morecambe	Rawtenstall
Bamber Bridge	Fleetwood	Leyland	Nelson	Skelmersdale
Chorley	Fulwood	Lytham StAnne's	Ormskirk	

Small (5,000 - 20,000 population)

Adlington	Burscough	Colne	Haslingden	Poulton-le-Fylde
Bacup	Carnforth	Coppull	Heysham	Preesal
Barnoldswick	Church	Euxton	Kirkham	Rishton
Barrowford	Clayton-le-Moors	Freckleton	Long ridge	Tarleton
Bolton-le-Sands	Cleveleys	Garstang	Longton	Thornton
Brierfield	Clitheroe	Great Harwood	Oswaldtwistle	Whitworth

Towns – UA options

- 2UA:** even split of large towns with Blackburn and Burnley in the South, and Blackpool and Preston in the North but South has a higher share of towns than North.
- 3UA:** 1 large town in each of the 3UA options – Blackburn and Burnley in the East, Blackpool in the North, and Preston in the South. Although more towns in the East a reflection of having the largest population of the UAs.
- 4A:** no large towns in the South – Blackburn and Burnley in the East, Preston in the North, and Blackpool in the West. Although South has the largest number of medium towns but again more towns in East reflects a higher population of around a third of total in Lancashire.
- 5UA:** no large towns in North or South. With Blackpool and Preston in the West – West has the largest population of UAs followed by South which has the highest number of medium towns.
- 4B:** 2 large towns in East (Blackburn and Burnley) and West (Blackpool and Preston). As such, East and West have larger populations, although South has largest number of medium towns. East accounts for 40% of towns.

2UA

	North	South
Large	2	2
Medium	5	9
Small	12	18
Total	19	29

3UA

	East	North	South
Large	2	1	1
Medium	4	4	6
Small	14	10	6
Total	20	15	13

4UA

	East	North	South	West
Large	2	1	0	1
Medium	4	3	5	2
Small	12	5	6	7
Total	18	9	11	10

5UA

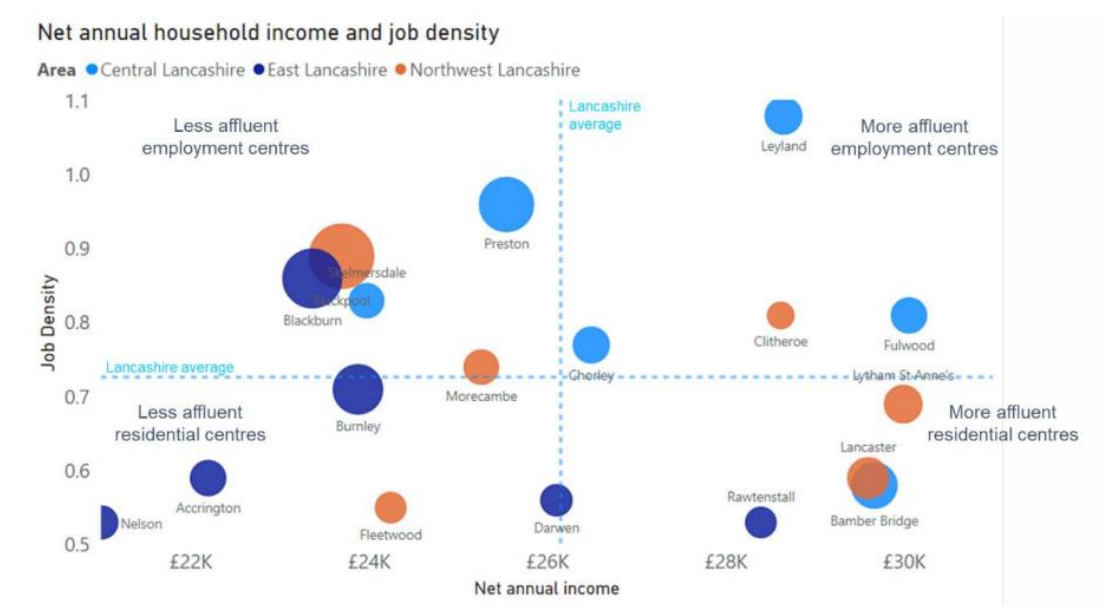
	North	South	West	East	Middle
Large	0	0	2	1	1
Medium	3	5	2	2	2
Small	6	6	4	7	7
Total	9	11	8	10	10

4UA B

	East	North	South	West
Large	2	0	0	2
Medium	4	2	5	3
Small	13	6	6	5
Total	19	8	11	10

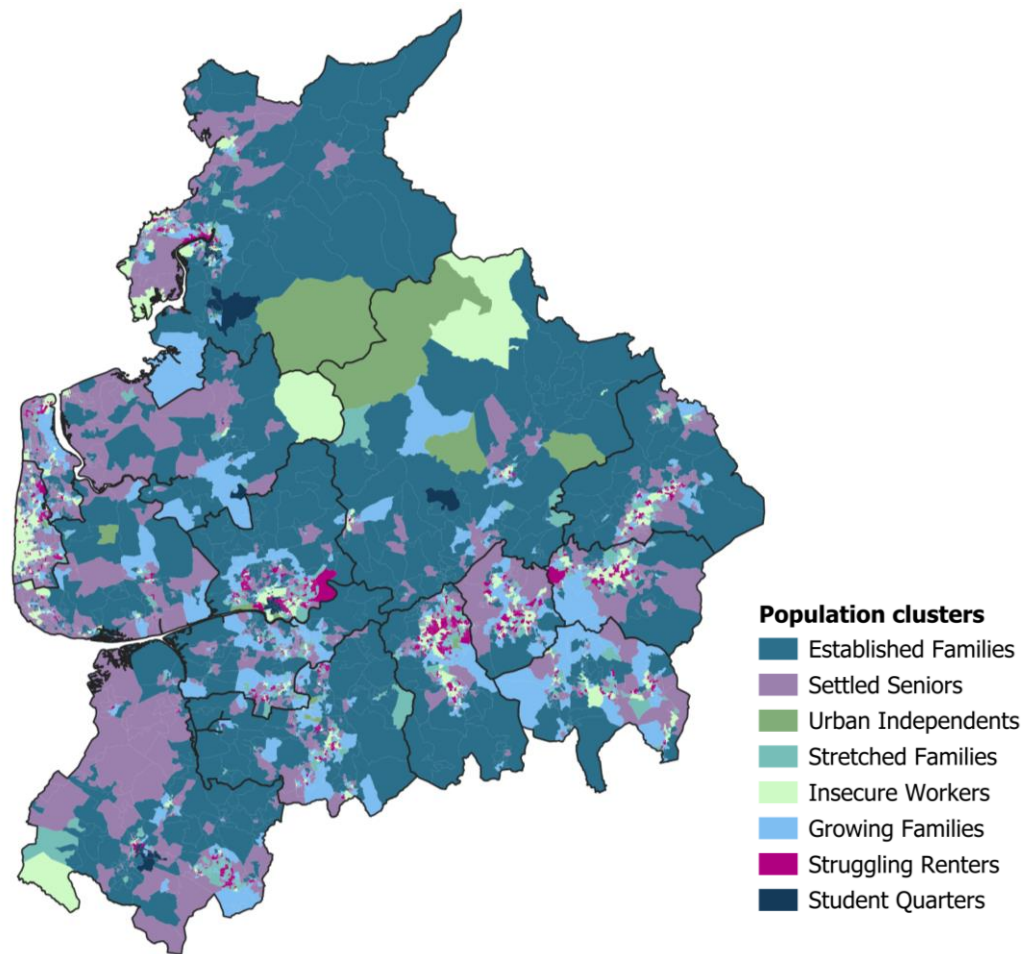
Typology of towns

Figure 18. Medium and large towns by job density and average earnings



- As part of the Lancashire Economic Review, an analysis was compiled to provide an indication on the role medium and large towns in Lancashire are playing. To proxy for which towns have a strong work function Jobs Density was used and to proxy for living, average income was used as an inductive measure. The idea being that those with higher spending power have more options over where they can choose to live. Typically, they will opt for places seen as more desirable to live in, while those with lower incomes are more likely to live in a less desirable location. Lancashire averages for jobs density and income have been used to create four quadrants.
- More affluent employment centres where populations have higher incomes and there are significant amounts of employment.
- Less affluent employment centres where populations have lower incomes, but there are significant amounts of employment.
- More affluent residential centres where populations have high incomes, but the town itself has a relatively small employment offer.
- Less affluent residential centres where populations have lower incomes, and there is generally lower availability of work.
- This reveals some consistent patterns – towns in East Lancashire typically have lower incomes, towns in Central Lancashire generally have higher job density, while towns in North West Lancashire are more diverse.

Population clusters



Metro Dynamics have used k-means cluster to produce a typology of census output areas across the UK. Output areas have been assigned into 8 different groups, based on the average characteristics of the households in these areas.

Groups are defined by their characteristics relative to the national average, e.g. where a group is described as young, this means that the people living in the areas belonging to this group are, on average, younger than nationally.

A breakdown of the different classifications can be found on the next slide. Much of the region is classified as established families, followed by settled seniors to the west of the county and growing families in the South East covering Darwen, Clayton-le-Moors, Haslingden and Hapton.

There are also pockets of insecure workers in Blackpool, Great Altcar, Fleetwood, Morecambe, Accrington, Blackburn, Slaidburn, Oakenclough and Preston.

Population clusters classifications

Established families: A homeowner in some form, whether this be outright or through a mortgage who are stable in their location; Likely in some form of managerial position and are highly skilled, often with level 4 qualifications or above; Do not face any notable levels of deprivation and as a part-result of this they tend to be in very good health; Likely married with young dependent children or no children.

Settled seniors: They are likely to own their house outright and are stable in their location; They are an older group who live either on their own, or as a couple, without children in the home; They tend to be more economically inactive; They face some level of deprivation and have a “fair” level of health rather than strong.

Urban independents: Higher share are renting their home privately or part of a shared ownership arrangement; Don’t face levels of deprivation and tend to be in very good health; Are highly skilled and in managerial positions; Likely living on their own.

Stretched families: Higher share socially renting and haven’t moved recently; Health levels are “fair” and a higher share of households deprived in at least two dimensions; Low qualification levels, working in routine occupations; Higher share of households containing a lone parent family.

Insecure workers: A higher share renting their home privately; A higher share who have moved within the past year, within the UK; Working in routine or semi-routine occupations with a higher share of those with no or entry level qualifications; Higher share in good health although face at least some level of deprivation; Higher share of those living on their own or with a couple without children.

Growing families: Higher share of those who own their home through a mortgage who are more likely than others to have moved within the UK in the past year; In very good health and likely facing no levels of deprivation; Skilled individuals employed in managerial roles; Higher share of those who are married or living with a partner, with dependent children.

Struggling renters: Notably higher share of those socially renting their home. These individuals haven’t moved in the past year; Struggle more with higher levels of deprivation and have the lowest share of those in good or very good health.; In routine occupations and likely to be economically active with a higher share of active yet unemployed individuals; Higher share of those with no or entry level qualifications.

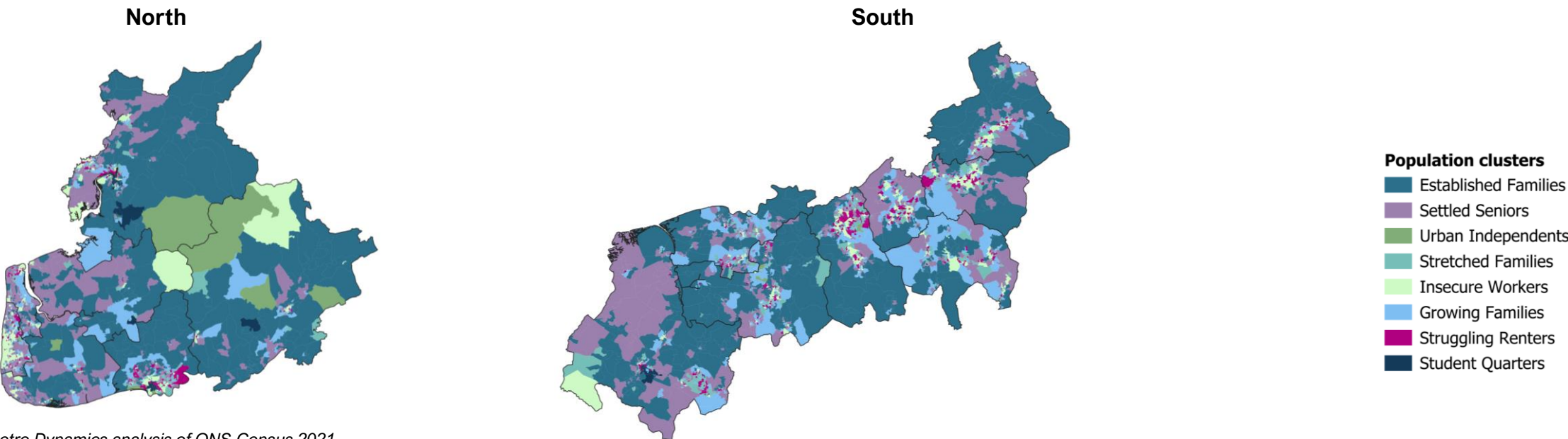
Student quarters: likely to be privately renting and have moved within the past year either within or to the UK; In very good health; Higher share of those in full-time education; Have achieved level 3 (A Level or equivalent) or level 4 (first year of a university degree) qualifications.

Population clusters – 2UA

Established families the largest population group across both UAs followed by growing families, with the group spread across central arc in the North but more concentrated in the South in South Ribble, Chorley, and North of Rossendale going into South of Burnley.

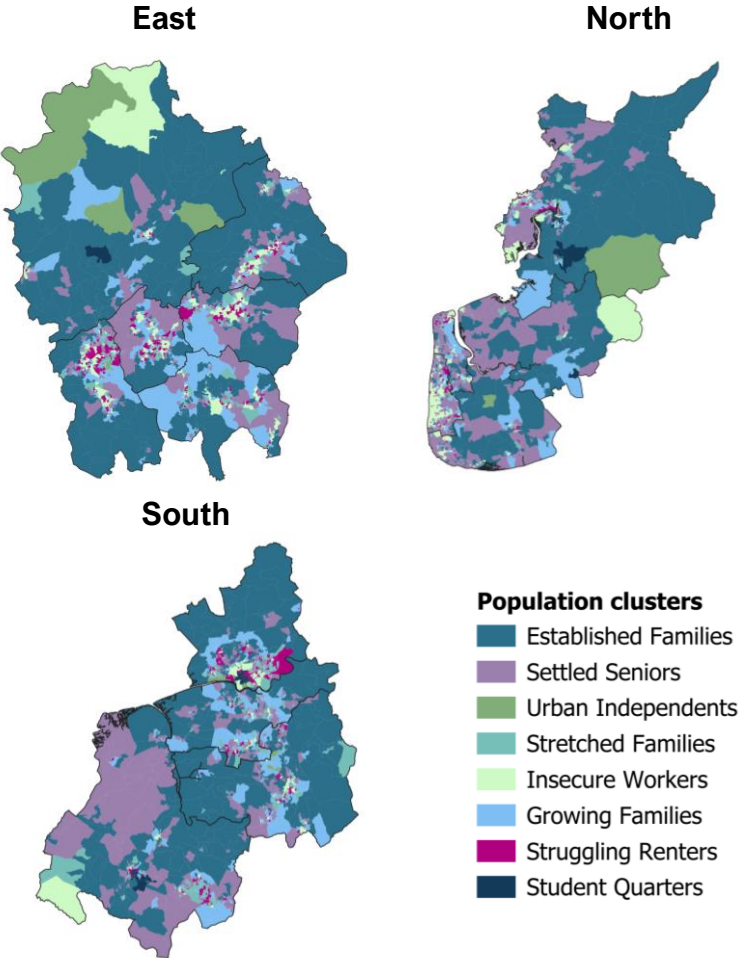
Settled seniors group are more concentrated in the West of the North UA in North Wyre, Lytham St Annes, Blackpool including Great Marton, Fleetwood, Morecambe and Heysham, and in the South UA the group is most concentrated in West Lancashire, North of Hyndburn, East Burnley and South Pendle. Although fewer are classified as stretched families, insecure workers, or struggling renters there are pockets in Blackpool, Preston, Morecambe, Lancaster, Oakenclough and Slaidburn in the North UA and Chorley, Blackburn and Darwen, Burnley, Colne, Bacup and Stacksteads, and Accrington in the South.

In the North there are student quarters located in Lancaster and urban independents on the border of Lancaster and Ribble Valley. There are also small areas of student quarters in Preston at UCLan across North and South divides, and in the South in Ormskirk at Edge Hill.



Source: Metro Dynamics analysis of ONS Census 2021

Population clusters – 3UA



Established families tend to be largest group across the 3 UAs particularly across the South (North of Preston Farington and Samlesbury in South Ribble, and Mawdesley and White Coppice in Chorley) and the East (South of Blackburn and Darwen, South of Hyndburn including Belthorn, much of Ribble Valley including Clitheroe, and Barley and Wycoller in Pendle).

There are also pockets classed as settled seniors in each of the UAs, more clustered in the South around West Lancashire; coastal areas in the North including Lytham St Annes, Fleetwood, and Morecambe as well as western areas of Wyre (Staynall, Preesall and Eagland Hill) – more of a spread in the East UA to the west of Hyndburn, East of Rossendale and some pockets in Pendle.

Also a strong concentration classed as growing families more concentrated in the East to the South of Burnley including Hapton and North East of Rossendale. There is more of a spread but tending to concentrate in the central belt in the South UA. There is a lower concentration of growing families in the North including Braides in Lancaster and Clifton in Wyre.

There are also small pockets of struggling renters particularly in the East in Blackburn and Darwen; Blackpool, Fleetwood, Morecambe, and Lancaster in the North; and Preston (Ribbleton), Leyland and Chorley in the South but there tend to be fewer people in this group in the South.

There tends to be more of the population classed as insecure workers in the East (Blackburn, Darwen, Accrington, Church, Colne, Burnley) and North (Blackpool, Lancaster and Oakenclough) than in the South although there are some pockets around Preston, Chorley and Great Altcar.

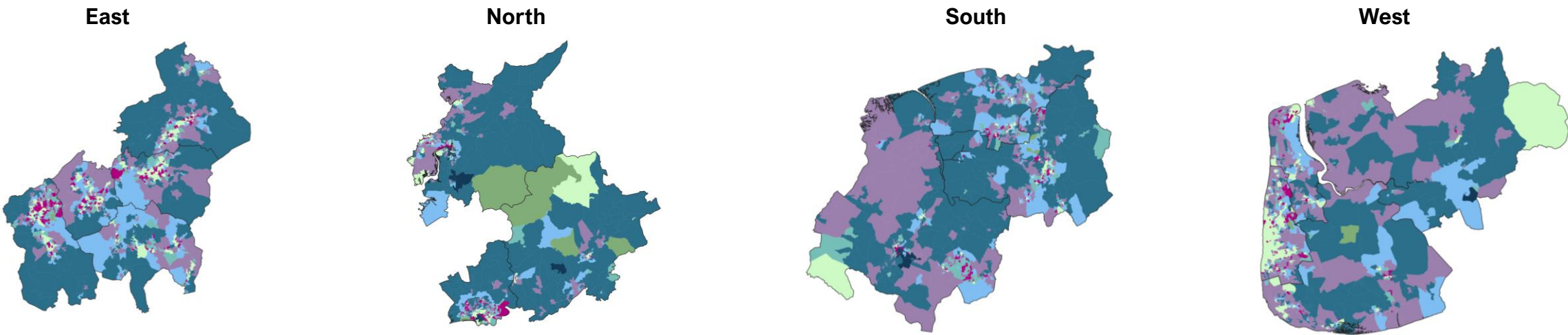
- Population clusters**
- Established Families
 - Settled Seniors
 - Urban Independents
 - Stretched Families
 - Insecure Workers
 - Growing Families
 - Struggling Renters
 - Student Quarters

Population clusters – 4UA

Established families remains the largest group across the 4UAs although there are differences. Starting with the East, there is a strong concentration of growing families in North of Rossendale and bordering into Burnley and some in North Hyndburn; settled seniors in much of North Hyndburn, South of Rossendale, South Pendle, and South and East Burnley. But there are also stretched families, insecure workers and struggling renters in Blackburn and Darwen, Church and Accrington, Bacup and Stacksteads, Burnley and central Pendle and Colne.

In the North, settled seniors are concentrated in Morecambe and Heysham and North Lancaster with some in Ribble Valley; less of a concentration of growing families but some in central Preston and Lancaster; urban independents in South Lancaster/North Ribble Valley; pockets of stretched families, insecure workers and struggling renters in Preston, Morecambe and Lancaster; and student quarters in Lancaster.

In the South, strong concentration of settled seniors in Western areas; growing families in South Ribble including Bamber Bridge; lower concentration of stretched families, insecure workers and struggling renters but some in Chorey. The West has the highest concentration of settled seniors (North and West Wyre including Poulton-le-Fylde, Lytham St Annes, South Blackpool and Fleetwood) and insecure workers particularly in Blackpool.



Source: Metro Dynamics analysis of ONS Census 2021

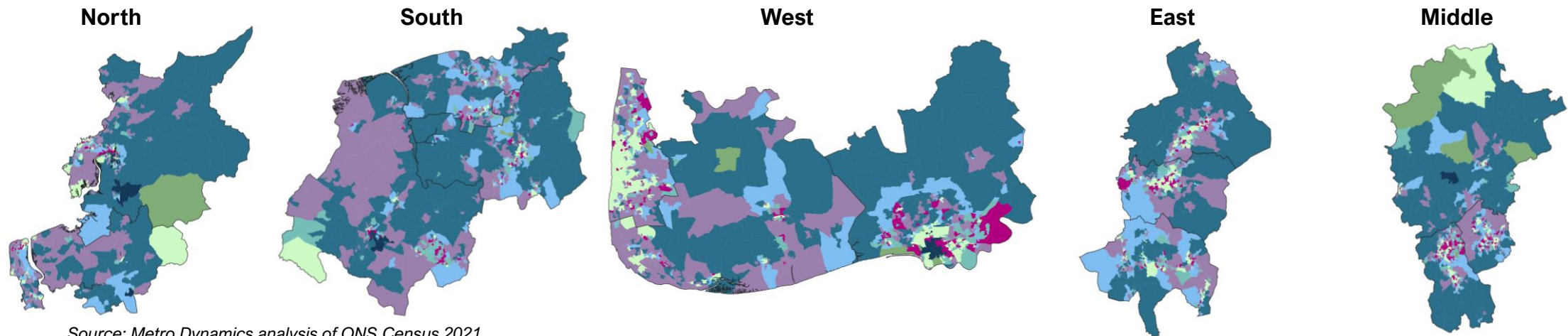
- Population clusters**
- Established Families
 - Settled Seniors
 - Urban Independents
 - Stretched Families
 - Insecure Workers
 - Growing Families
 - Struggling Renters
 - Student Quarters

Population clusters – 5UA

Established families largest group although less so in North, West, and East. In the North, settled seniors are concentrated in Morecambe and Heysham and North Lancaster with some in Ribble Valley; less of a concentration of growing families but some in central Preston and Lancaster; urban independents in South Lancaster/North Ribble Valley; pockets of stretched families, insecure workers and struggling renters in Preston, Morecambe and Lancaster; and student quarters in Lancaster.

In the South, strong concentration of settled seniors in western areas; growing families in South Ribble including Bamber Bridge; lower concentration of stretched families, insecure workers and struggling renters but some in Chorey. West Lancashire a high concentration of settled seniors (North and West Wyre including Poulton-le-Fylde, Lytham St Annes, South Blackpool and Fleetwood) and insecure workers particularly in Blackpool.

East Lancashire, there is a strong concentration of growing families in North of Rossendale and bordering into Burnley; settled seniors in South of Rossendale, South Pendle, and South and East Burnley. But there are also stretched families, insecure workers and struggling renters in Burnley and central Pendle and Colne. Middle UA settled seniors concentrated in North Hyndburn including Great Harwood; growing families in South Blackburn and central and southern areas of Hyndburn; some urban independents in North of Ribble Valley; and then pockets of stretched families, insecure workers and struggling renters in Blackburn and Darwen, Church and Accrington, with some in Longridge and Low Moor.



Source: Metro Dynamics analysis of ONS Census 2021

- Population clusters**
- Established Families
 - Settled Seniors
 - Urban Independents
 - Stretched Families
 - Insecure Workers
 - Growing Families
 - Struggling Renters
 - Student Quarters

Population clusters – 4UA B

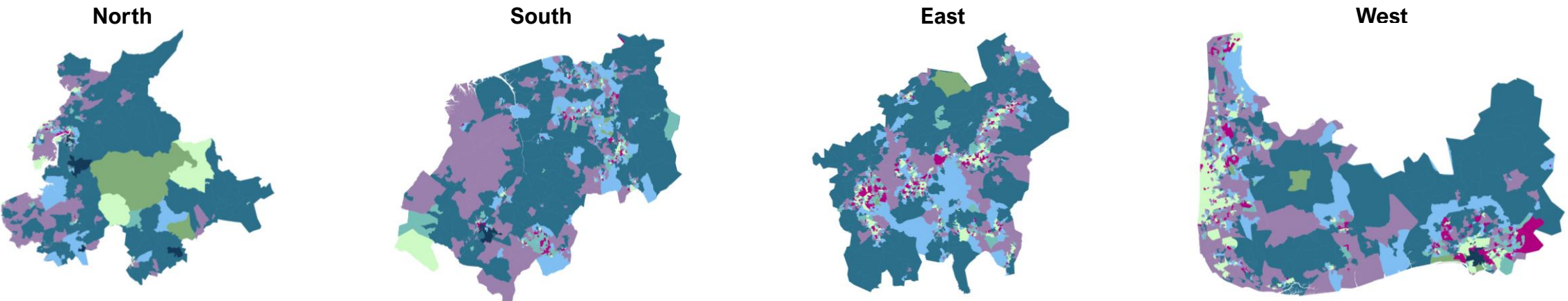
Established families is the largest group although less so in West and East UAs.

In the North, settled seniors are concentrated in Morecambe and Heysham and North Lancaster with some in Ribble Valley; less of a concentration of growing families but some in Lancaster; urban independents in South Lancaster/North Ribble Valey; pockets of stretched families, insecure workers and struggling renters in Morecambe and Lancaster; and student quarters in Lancaster.

In the South, strong concentration of settled seniors in Western areas; growing families in South Ribble including Bamber Bridge; lower concentration of stretched families, insecure workers and struggling renters but some in Chorey.

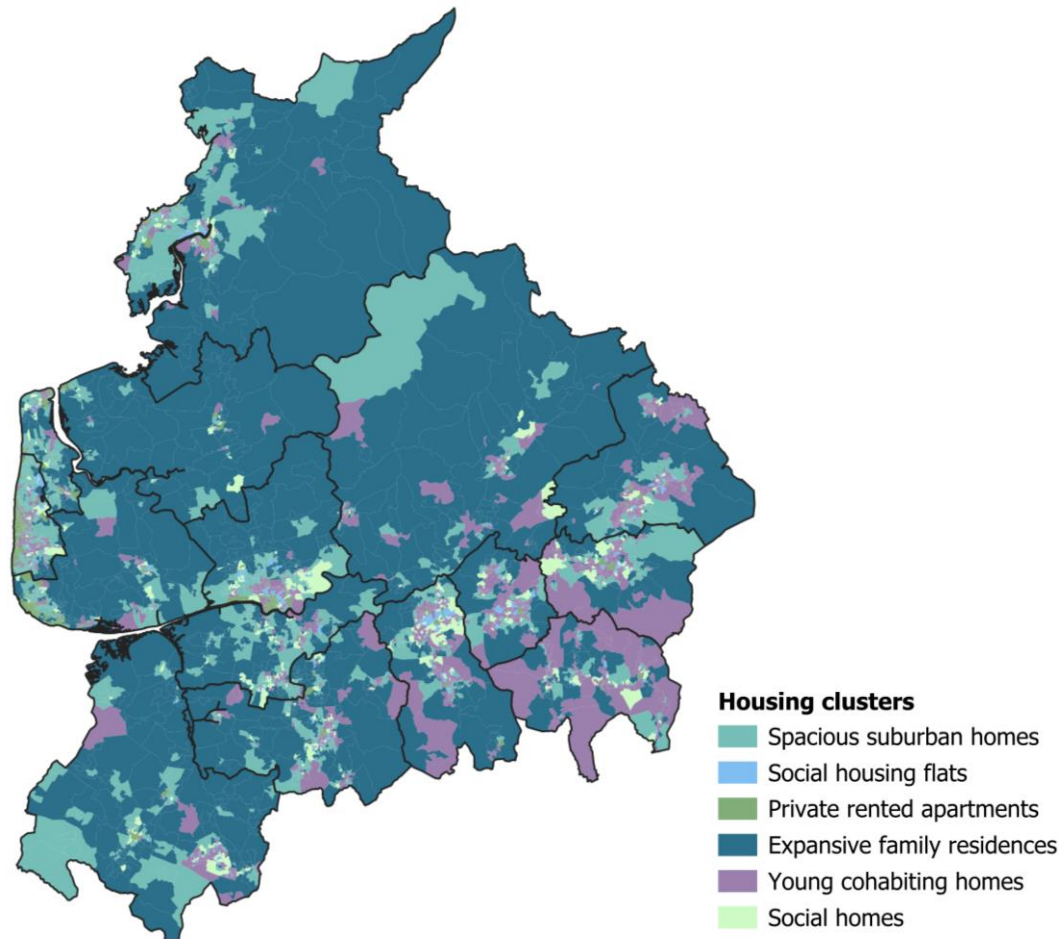
West UA has a high concentration of settled seniors (North and West Wyre including Poulton-le-Fylde, Lytham St Annes, South Blackpool and Fleetwood) and insecure workers, particularly in Blackpool.

East UA there is a strong concentration of growing families in North of Rossendale and bordering into Burnley; settled seniors in South of Rossendale, South Pendle, and South and East Burnley. But there are also stretched families, insecure workers and struggling renters in Burnley and central Pendle and Colne.



Source: Metro Dynamics analysis of ONS Census 2021

Housing clusters



This approach groups census output areas (the smallest available area) into groups which share similar characteristics in the type of housing that is present. It uses a *k-means clustering* approach which splits data into *k* groups by minimising the differences between members of the same group. This uses 2021 Census data

Metro Dynamics have grouped all census output areas in England and Wales into 6 clusters, based on variables that describe the type of housing in an area:

- Central heating
- Housing type
- Number of bedrooms
- Occupancy rate of bedrooms
- Type of tenure
- Type of household

Expansive family residences largest housing group particularly through the central belt of Lancashire, followed by young cohabiting homes particularly in the South East and spacious suburban homes spread around the county. There are also clusters of social homes typically in urban centres of Blackburn, Oswaldtwistle and Church, Ribbleton, Skelmersdale and Lancaster, and coastal areas of Blackpool and Fleetwood.

Housing cluster groups

Spacious Suburban Homes: Higher share of over 66 households and married couples; Lower share of one person below 66. Three bedrooms; Houses are relatively under-occupied; High rates of ownership (outright and mortgage); Semi-detached houses more common than in other groups.

Basic Social Flats: No central heating; Mainly one or two bed. Social rented & flats; One person households and single parent families more common; Fewer with high bedroom occupancy (i.e. they tend not to have spare rooms).

Young Adult Rentals: No central heating; Mainly one or two bed; Private rented; Flats and bedsits (or parts of converted house); Occupancy rating neutral (neither over or under occupied), less overcrowding than *Basic Social Flats*; More third level students as occupiers.

Expansive Family Residences: Three beds, four or more bedrooms + high share with occupancy rating of two or more (i.e. they have spare bedrooms); Married couples, over 66s; High levels of ownership, outright or with mortgage; Detached houses.

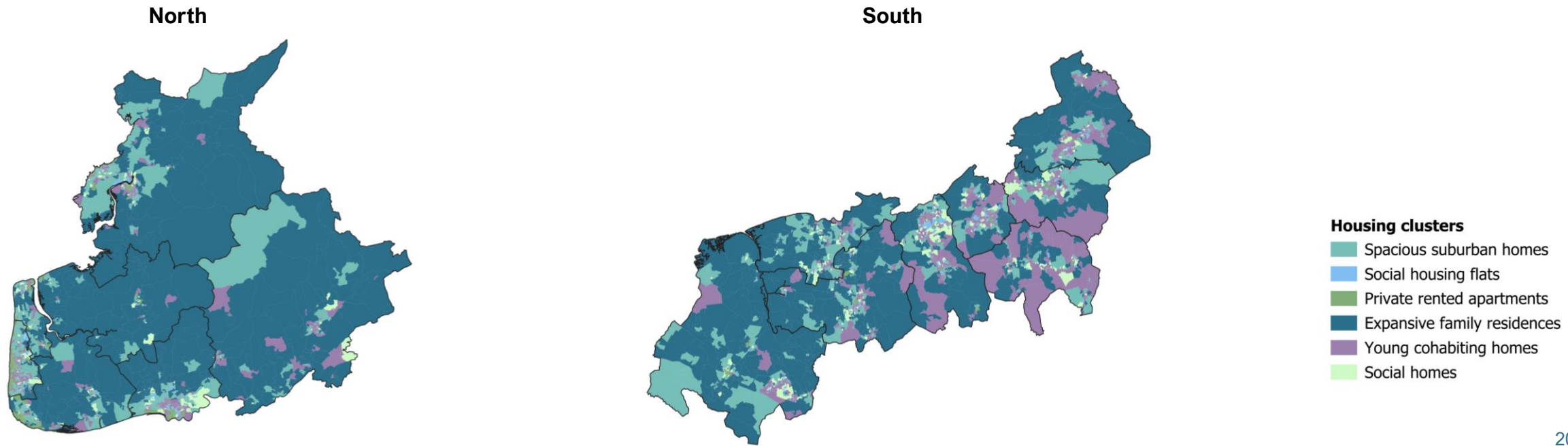
Young Cohabiting Homes: Younger, cohabitating couples; 2 or 3 bed, slightly under-occupied (i.e. More with spare bedrooms); Mortgages, terraced; Above average levels of private rented, below average levels of social housing.

Crowded Social Homes: Social rented; Terraced/semi detached; Lower ownership levels and private renting; Higher than average crowding; More single parent households.

Housing clusters – 2UA

Expansive family residences are the largest housing group particularly in North Lancashire, although there are also pockets of spacious suburban homes in North of Ribble Valley, South Preston, some of Blackpool, Lancaster, Heysham and Morecambe; young cohabiting homes in South of Preston, Blackpool and Lancaster; private rented apartments in Blackpool, South Preston and Lancaster city centre; and social homes/flats in Blackpool including South of Great Marton, Fulwood, North Lancaster and Sabden.

There is more of a mix on South Lancashire with clusters of spacious suburban homes in North of South Ribble, Great Altcar and Bickerstaffe in West Lancashire, North of Blackburn, North of Burnley and South and central Pendle; young cohabiting homes particularly in Rossendale, central Pendle, Darwen and Belmont; and social housing/flats in Skelmersdale, central areas of South Ribble and Chorley, Balckburn, Church and Accrington, Burnley and Colne.



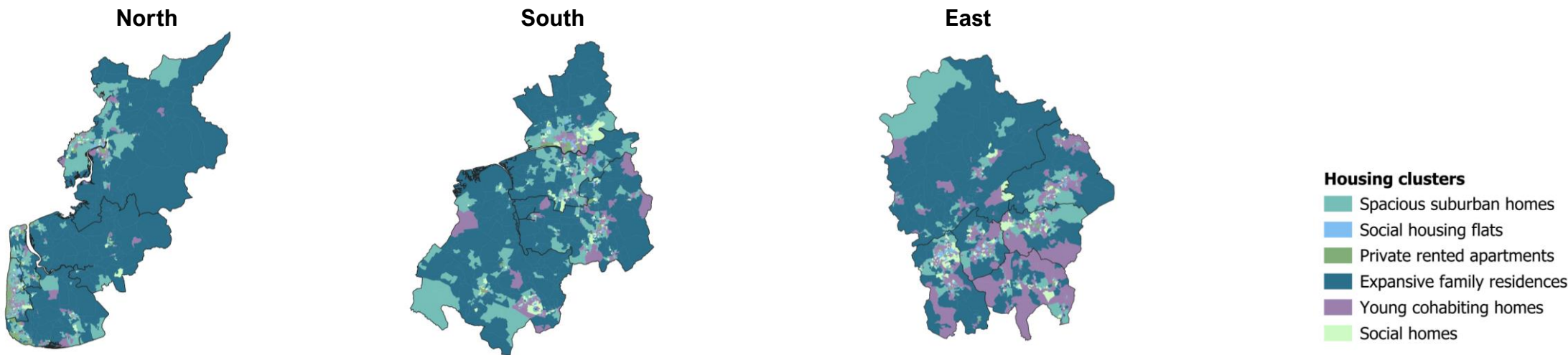
Source: Metro Dynamics analysis of ONS Census 2021

Housing clusters – 3UA

Expansive family residences tends to be the largest housing group particularly in South Lancashire in North Preston, much of Chorley and South Ribble and Northern areas of West Lancashire; and North Lancashire covering much of Wyre and Fylde and East and South Lancaster. Similarly, much of the North of East Lancashire is in the expansive family residences group covering much of Ribble Valley, North East of Pendle including Barley, and southern areas of Blackburn around Edgworth.

East Lancashire shows more of a mix of housing groups with a stronger concentration of young cohabitating homes particularly in Rossendale; South Burnley covering Holme Chapel, central Hyndburn covering Church and Clayton-le-Moors; Barnoldswick and Colne in Pendle; and Darwen and Belmont in Blackburn. There are also clusters in South around South Preston, central Chorley, Skelmersdale in West Lancashire and Bamber Bridge in South Ribble. There are some clusters of young cohabitating homes in North Lancashire in Blackpool but not as prevalent.

There are clusters of spacious suburban homes scattered around South Lancashire in southern areas of Preston; northern and central areas in South Ribble including Higher Penwortham; some in central Chorley and southern areas and Great Altcar and Bickerstaffe in West Lancashire. Some in East Lancashire in Sykes and Dunsop Bridge and Clitheroe in Ribble Valley, south of Pendle) and North of Blackburn. Also, some in coastal areas in North Lancashire in Heysham, Lytham St Annes and Blackpool although there is also a strong concentration of private rented apartments and social housing. Social housing is a smaller group but there are concentrations in other urban centres in Blackburn, Burnley, Oswaldtwistle and Church, Ribblesdale, Skelmersdale and Lancaster.



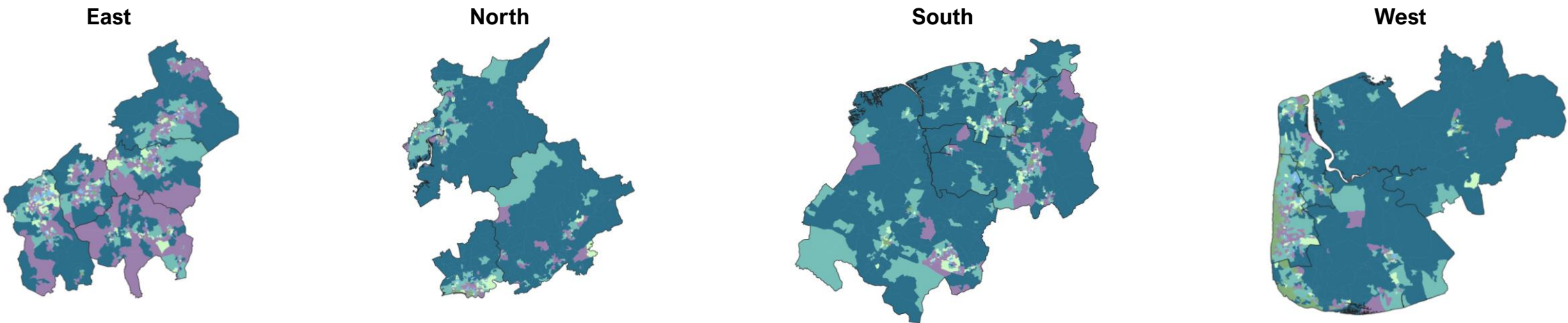
Source: Metro Dynamics analysis of ONS Census 2021

- Housing clusters**
- Spacious suburban homes
 - Social housing flats
 - Private rented apartments
 - Expansive family residences
 - Young cohabiting homes
 - Social homes

Housing clusters – 4UA

Expansive family residences main housing group in much of North, South and West Lancashire, followed by spacious suburban homes in Morecambe, Heysham and North Lancaster (North), South of West Lancashire district, North of South Ribble and central and southern Chorley (South) and coastal areas of Blackpool, Lytham St Annes and Fleetwood (West). Some young cohabitating homes in South Lancashire including Bamber Bridge, central Chorley and eastern areas including Hoghton and West Lancashire in Blackpool but less of a concentration than in East Lancashire. Smaller concentrations of private apartments, and social houses/flats including Blackpool, Leyland, Skelmersdale, Preston including Ribbleton and North of Lancaster city centre.

East Lancashire has more of a spread of housing groups, with the largest concentration of young cohabitating homes particularly in Rossendale and central Pendle; spacious suburban homes across Northern areas including Blackburn, Oswaldtwistle, North Burnley and South Pendle; and clusters of social housing/flats including Blackburn, Church and Accrington, Burnley and Colne.



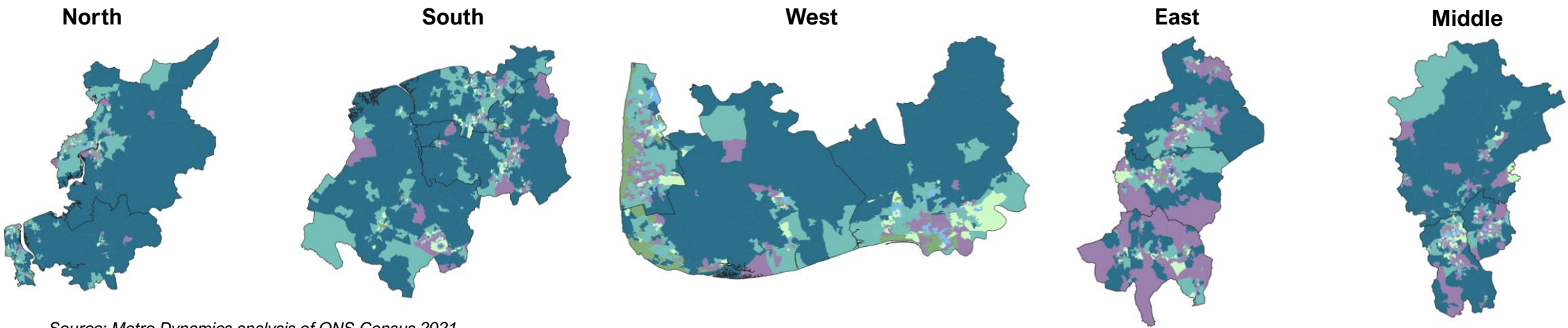
Source: Metro Dynamics analysis of ONS Census 2021

- Housing clusters**
- Spacious suburban homes
 - Social housing flats
 - Private rented apartments
 - Expansive family residences
 - Young cohabiting homes
 - Social homes

Housing clusters – 5UA

Expansive family residences main housing group in much of North, South and West Lancashire, followed by spacious suburban homes in Morecambe, Heysham and North Lancaster (North), South of West Lancashire district, North of South Ribble and central and southern Chorley (South) and coastal areas of Blackpool, Lytham St Annes and Fleetwood (West). Some young cohabitating homes in South Lancashire including Bamber Bridge, central Chorley and eastern areas including Hoghton and West Lancashire in Blackpool but less of a concentration than in East Lancashire. Smaller concentrations of private apartments, and social houses/flats including Blackpool, Leyland, Skelmersdale, Preston including Ribbleton and North of Lancaster city centre.

East Lancashire has more of a spread of housing group, with the largest concentration of young cohabitating homes particularly in Rossendale and central Pendle; spacious suburban homes across Northern areas including North Burnley and South Pendle; and clusters of social housing/flats including Burnley and Colne. In Middle Lancashire, much of North (Ribble Valley) classed in expansive family residences and spacious suburban homes in North in Sykes; there is more of a mix in Blackburn and Hyndburn – some spacious suburban homes in North Blackburn and South Hyndburn; young cohabiting homes in Darwen and central Hyndburn; and pockets of social housing/flats in Blackburn, Church and Accrington.



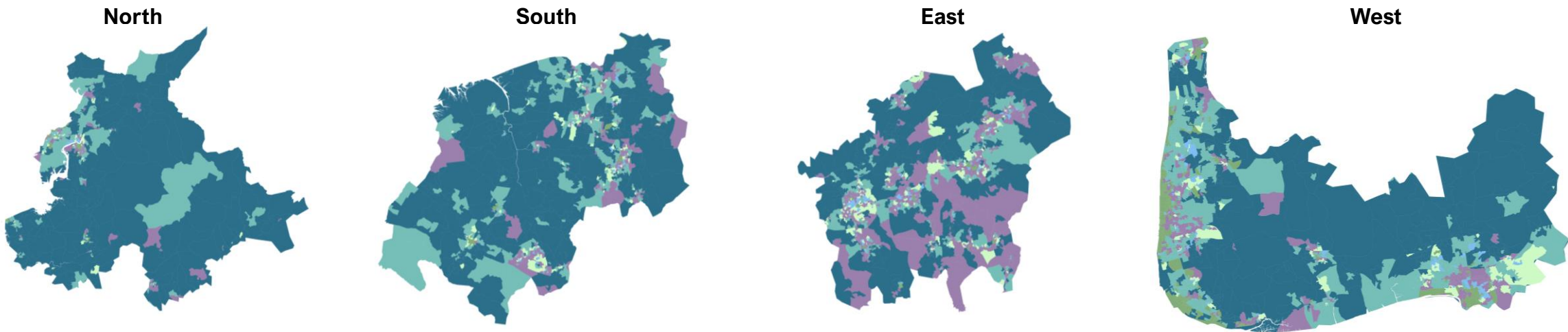
Source: Metro Dynamics analysis of ONS Census 2021

- Housing clusters**
- Spacious suburban homes
 - Social housing flats
 - Private rented apartments
 - Expansive family residences
 - Young cohabiting homes
 - Social homes

Housing clusters – 4UA B

Expansive family residences main housing group in much of North, South and West Lancashire, followed by spacious suburban homes in Morecambe, Heysham and North Lancaster (North), South of West Lancashire district, North of South Ribble and central and southern Chorley (South) and coastal areas of Blackpool, Lytham St Annes and Fleetwood (West). Some young cohabiting homes in South Lancashire including Bamber Bridge, central Chorley and eastern areas including Hoghton and West Lancashire in Blackpool but less of a concentration than in East Lancashire. Smaller concentrations of private apartments, and social houses/flats including Blackpool, Leyland, Skelmersdale, Preston including Ribbleton and North of Lancaster city centre.

East Lancashire has more of a spread of housing groups, with the largest concentration of young cohabiting homes particularly in Rossendale and central Pendle; spacious suburban homes across Northern areas including Blackburn, Oswaldtwistle, North Burnley and South Pendle; and clusters of social housing/flats including Blackburn, Church and Accrington, Burnley and Colne.



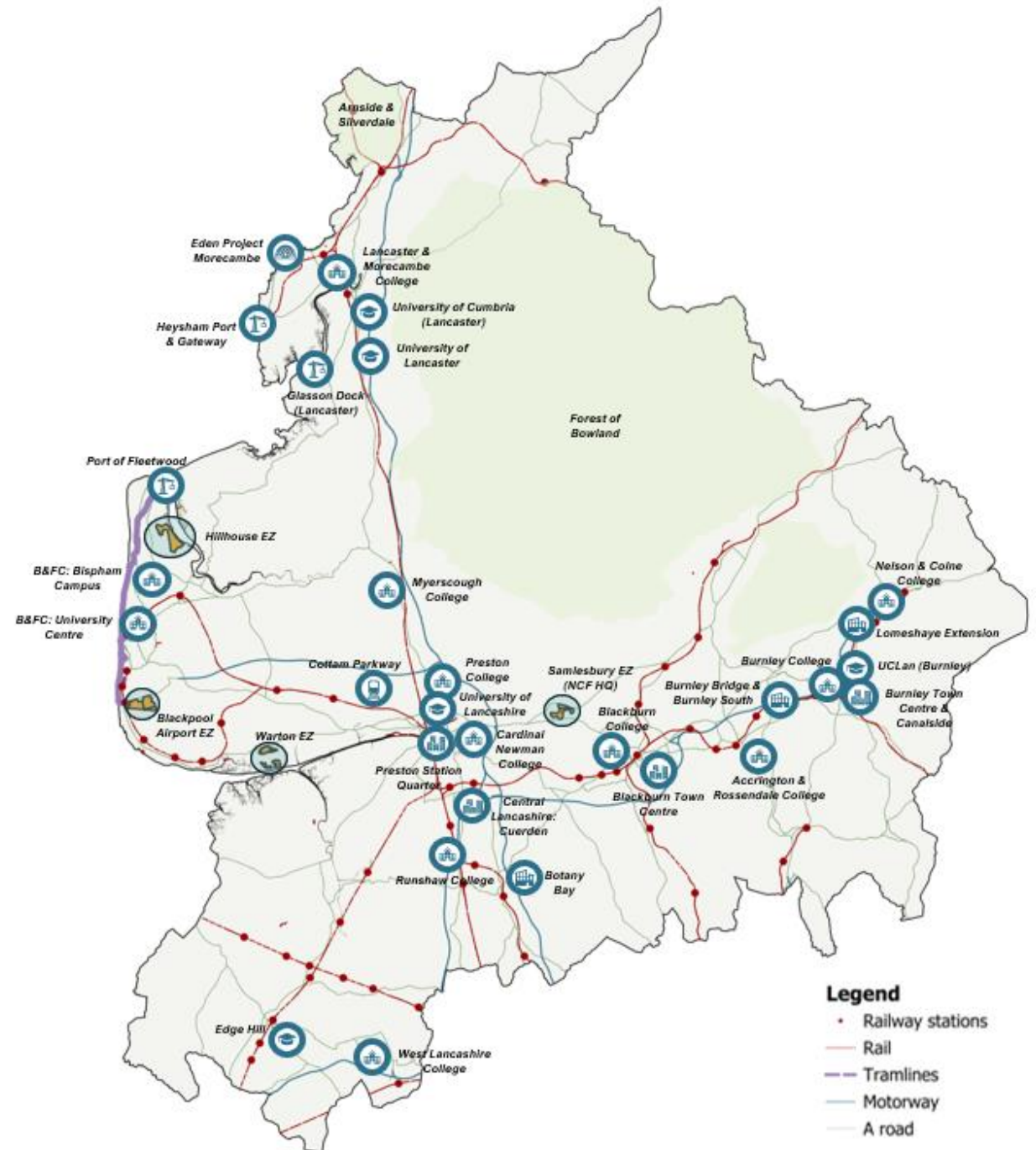
Source: Metro Dynamics analysis of ONS Census 2021

Asset map

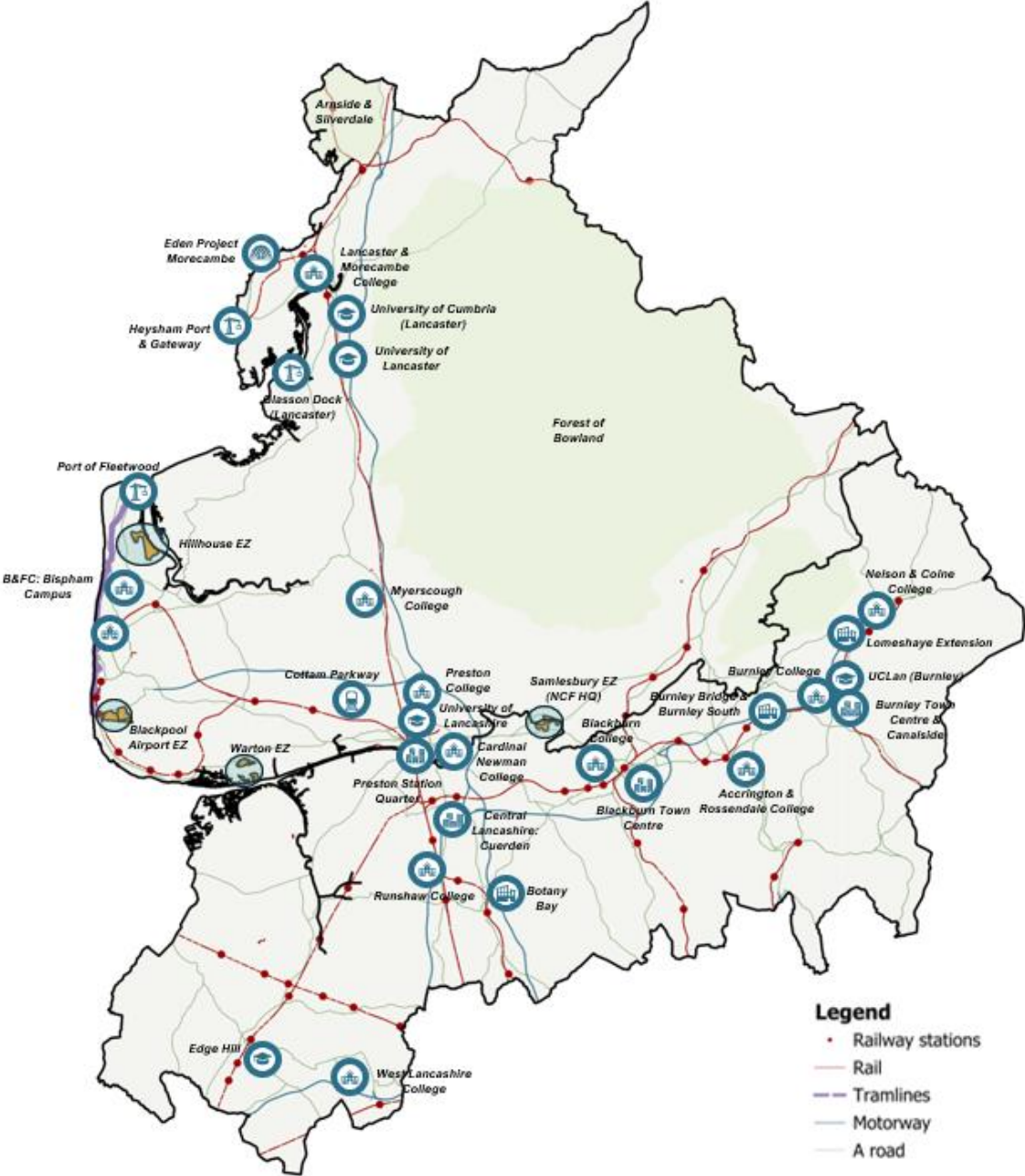
The map to the right show key assets across the county including:

- Four Enterprise Zones of Hillhouse, Blackpool Airport, Warton, and Samlesbury
- Ports of Fleetwood, Heysham, and Glasson Dock
- Higher Education: University of Lancaster, University of Lancashire campuses in Preston and Burnley, Edge Hill, and University of Cumbria campus in Lancaster
- Further Education colleges
- Key developments, drawing on projects listed in the latest Lancashire Growth Plan and related resources
- National Landscapes (previously Areas of Outstanding Natural Beauty) of Forest of Bowland and Arnsdale & Silverdale

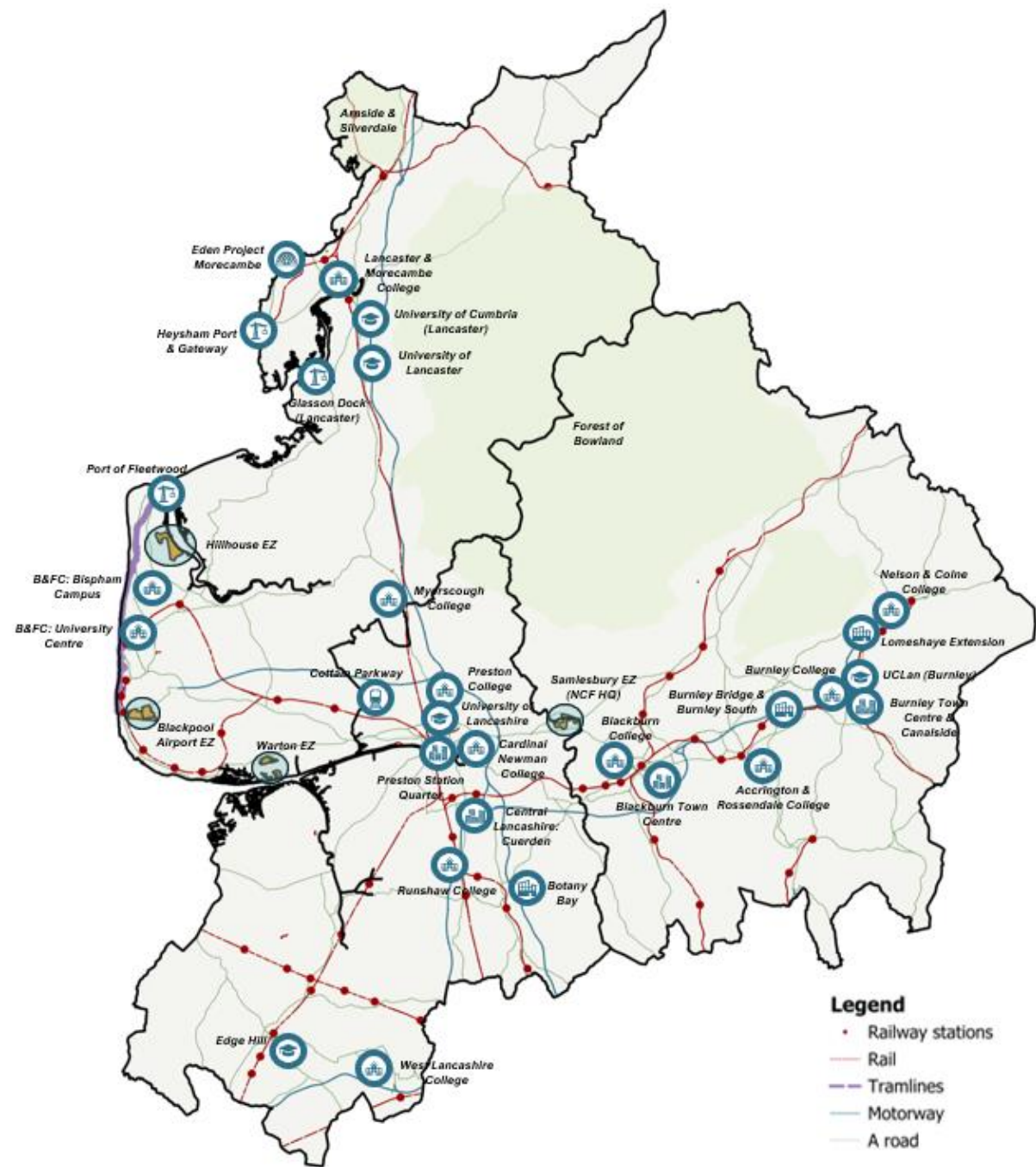
The next four slides show the same asset map but using different boundaries proposed by a 2UA (North and South); 3UA (East, North and South); 4UA (East, North, South and West); and 5UA (North, South, West, East and Middle) options.



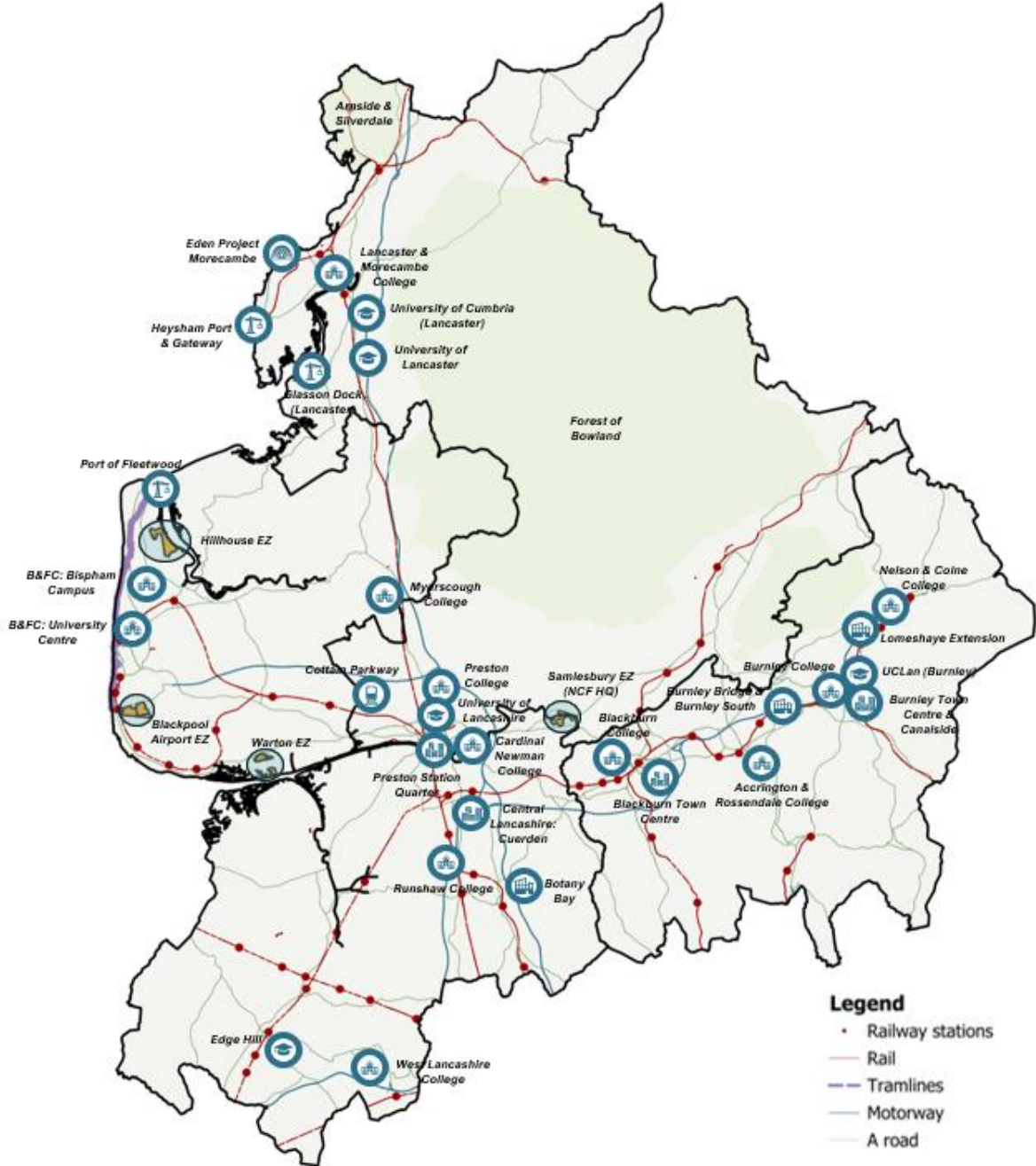
Asset map – 2UA



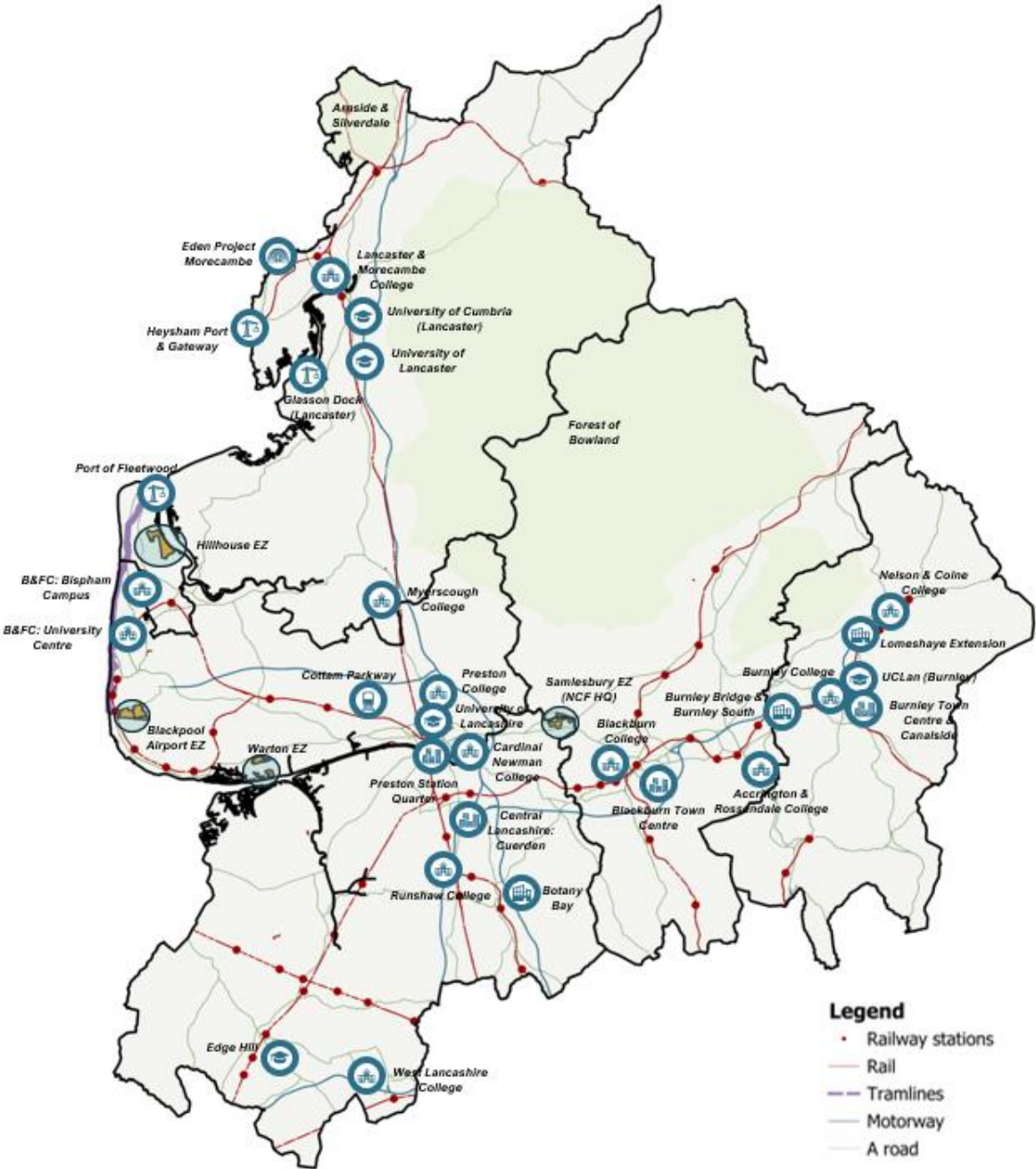
Asset map – 3UA



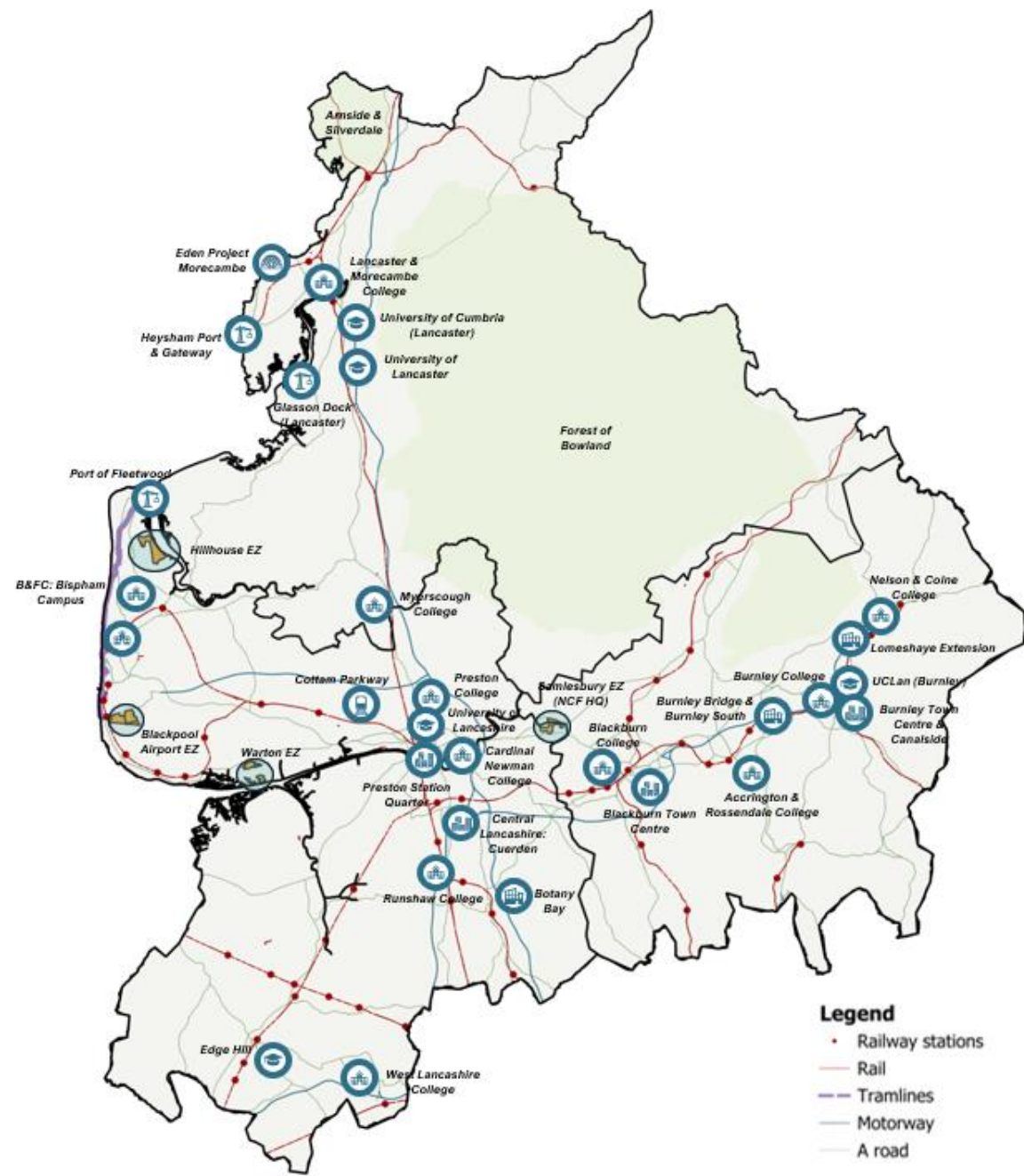
Asset map – 4UA



Asset map – 5UA



Asset map – 4UA B

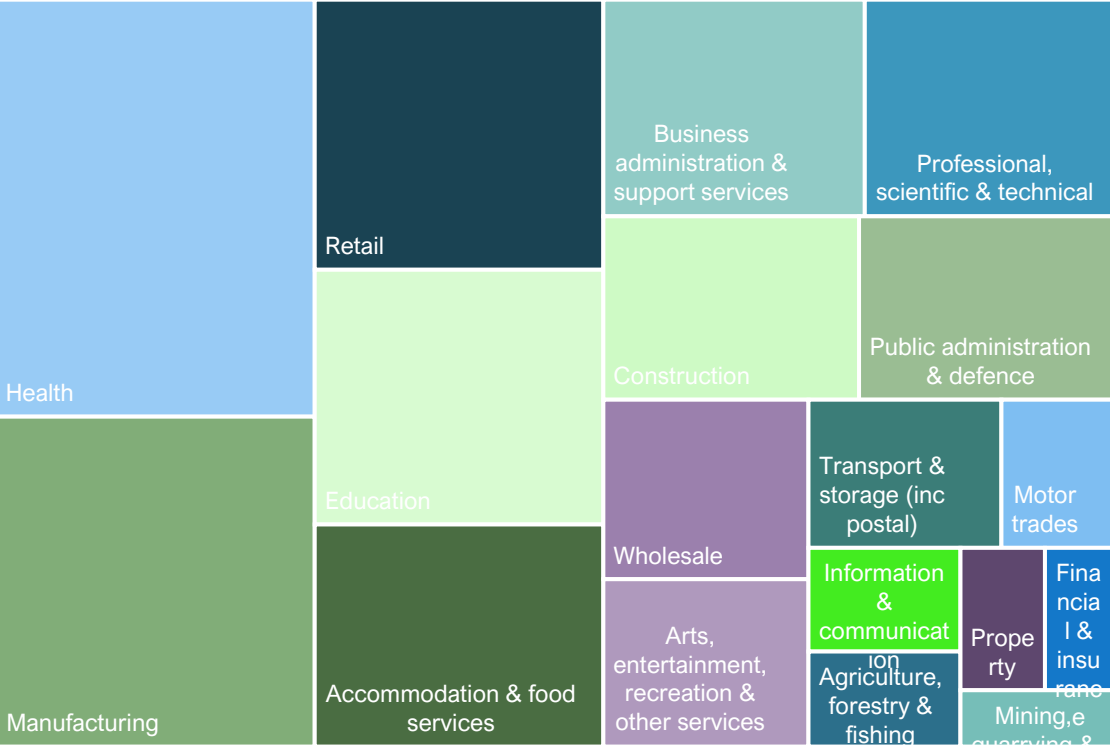


Sectors and clusters

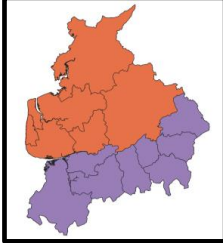
Employment estimates by sector

The largest sector by employment in Lancashire is the Health, which employs over 108,000 people in 2023, making up 16% of the workforce, slightly above the North West average of 14.9%. Compared to the North West, Lancashire has a notably higher share of jobs in Manufacturing and Construction, but lags behind in Information & Communication, Financial Services, and Professional & Technical Services.

Lancashire employment by sector (2023)



- Comparing the districts against the Lancashire average in 2023, Pendle stands out with a significantly higher share of employment in Manufacturing at 27%, more than double the Lancashire average of 13%. Similarly, Ribble Valley (25%), Rossendale (21%), and Fylde (20%) also show strong manufacturing presence, while Lancaster and Preston are notably below average at just 5%.
- Burnley has a particularly high concentration in Retail (excluding Wholesale and Motor Trades), with 14% of employment in this sector versus the county average of 9%. Blackpool leads in Accommodation & Food Services, with 13% of employment in this sector, well above the Lancashire average of 8%.
- In Professional, Scientific & Technical Services, Fylde is a clear outlier, with 20% of its workforce in this sector, more than triple the county average of 6%.
- Blackpool and Blackburn with Darwen have elevated employment in Health, at 25% and 22% respectively, compared to the Lancashire average of 16%. In contrast, Fylde, Pendle, Ribble Valley, Rossendale, and West Lancashire all fall below the county average in this sector.

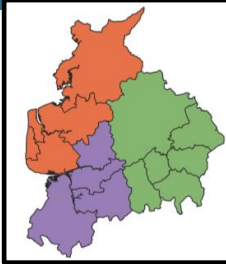


Employment estimates by sector – 2UA

Employment by Sector	North			South		
Year	2019	2023	2019-23	2019	2023	2019-23
Agriculture, forestry & fishing	6,505	6,720	0.8%	5,010	5,005	0.0%
Mining, quarrying & utilities	3,985	4,305	1.9%	3,780	2,635	-8.6%
Manufacturing	40,000	41,250	0.8%	45,000	44,250	-0.4%
Construction	16,125	17,750	2.4%	22,125	20,375	-2.0%
Motor trades	7,925	6,600	-4.5%	8,000	6,750	-4.2%
Wholesale	13,575	13,900	0.6%	16,875	16,000	-1.3%
Retail	34,875	32,000	-2.1%	32,250	31,250	-0.8%
Transport & storage (inc postal)	13,200	9,875	-7.0%	16,525	13,325	-5.2%
Accommodation & food services	29,500	31,750	1.9%	17,125	20,250	4.3%
Information & communication	6,750	6,800	0.2%	7,200	5,975	-4.6%
Financial & insurance	5,595	4,790	-3.8%	3,615	3,030	-4.3%
Property	4,275	4,315	0.2%	4,245	5,470	6.5%
Professional, scientific & technical	22,750	26,750	4.1%	16,950	16,775	-0.3%
Business administration & support services	25,100	24,375	-0.7%	19,625	21,625	2.5%
Public administration & defence	21,425	28,100	7.0%	11,100	9,700	-3.3%
Education	31,750	33,250	1.2%	23,875	26,375	2.5%
Health	57,500	58,000	0.2%	46,250	50,125	2.0%
Arts, entertainment, recreation & other services	15,025	15,650	1.0%	13,125	12,250	-1.7%

- In 2023, the North had a higher total employment count (366,000) than the South (311,000), with Health, Manufacturing, and Education being the top sectors in the North, while the South’s leading sectors are Health, Manufacturing, and Retail.
- Professional, scientific & technical roles in the North rose dramatically from 18,625 to 26,750 (+8,125 jobs) between 2015 and 2023, making it the region’s fastest-growing sector. The South also saw growth, from 15,700 to 16,775 (+1,075 jobs), but at a much slower pace.
- Construction employment between 2015 and 2023 in the North jumped from 14,375 to 17,750 (+3,375 jobs), while the South saw a slight decline from 20,700 to 20,375 (-325 jobs), suggesting stronger development activity in the North.
- Information & communication saw steep declines in both unitary options, with the North dropping from 9,025 to 6,800 (-2,225 jobs) and the South from 9,325 to 5,975 (-3,350 jobs), indicating a significant contraction in digital sector employment.
- Health employment increased in both unitary options, with the North rising from 51,500 to 58,000 (+6,500 jobs) and the South from 47,500 to 50,125 (+2,625 jobs), showing consistent growth in public health services.

Source: Business Register and Employment Survey, ONS, 2025

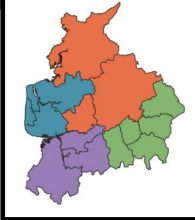


Employment estimates by sector – 3UA

Employment by Sector	North			South			East		
Year	2019	2023	2019-23	2019	2023	2019-23	2019	2023	2019-23
Agriculture, forestry & fishing	3,680	3,795	0.8%	4,600	4,650	0.3%	3,235	3,280	0.3%
Mining, quarrying & utilities	2,705	2,625	-0.7%	3,340	2,570	-6.3%	1,720	1,745	0.4%
Manufacturing	19,000	20,250	1.6%	22,000	21,250	-0.9%	44,000	44,000	0.0%
Construction	8,375	9,500	3.2%	21,000	17,250	-4.8%	8,875	11,375	6.4%
Motor trades	4,100	3,225	-5.8%	6,625	5,775	-3.4%	5,200	4,350	-4.4%
Wholesale	5,075	4,900	-0.9%	13,250	14,125	1.6%	12,125	10,875	-2.7%
Retail	21,000	19,000	-2.5%	21,000	20,500	-0.6%	25,125	23,750	-1.4%
Transport & storage (inc postal)	7,600	5,525	-7.7%	12,750	11,250	-3.1%	9,375	6,425	-9.0%
Accommodation & food services	20,000	21,750	2.1%	14,500	16,000	2.5%	12,125	14,250	4.1%
Information & communication	3,325	3,600	2.0%	5,875	4,625	-5.8%	4,750	4,550	-1.1%
Financial & insurance	2,720	2,455	-2.5%	4,225	3,635	-3.7%	2,265	1,730	-6.5%
Property	2,275	2,350	0.8%	3,475	3,950	3.3%	2,770	3,485	5.9%
Professional, scientific & technical	14,000	17,250	5.4%	14,250	14,500	0.4%	11,450	11,775	0.7%
Business administration & support services	10,900	11,125	0.5%	20,500	21,000	0.6%	13,325	13,875	1.0%
Public administration & defence	11,075	12,875	3.8%	14,525	18,050	5.6%	6,925	6,875	-0.2%
Education	19,000	19,875	1.1%	18,000	20,250	3.0%	18,625	19,500	1.2%
Health	33,500	34,250	0.6%	37,000	38,500	1.0%	33,250	35,375	1.6%
Arts, entertainment, recreation & other services	9,750	10,500	1.9%	9,000	8,500	-1.4%	9,400	8,900	-1.4%

- In 2023, the South had the highest total employment at 246,500, followed by the East with 226,000, and the North with 204,500. The South’s top sectors were Health, Education, and Professional, scientific & technical, while the East led in Manufacturing, Health, and Education. The North’s largest sectors were Health, Manufacturing, and Education, though with lower overall counts than the other regions.
- Between 2015 and 2023 Professional, scientific & technical roles in the North rose dramatically from 12,000 to 17,250 (+5,250 jobs), making it the region’s fastest-growing sector. The South also saw growth, from 11,875 to 14,500 (+2,625 jobs), while the East increased from 10,450 to 11,775 (+1,325 jobs).
- Construction employment surged in the East from 8,200 to 11,375 (+3,175 jobs), outpacing the North’s rise from 7,875 to 9,500 (+1,625 jobs). In contrast, the South saw a decline from 19,000 to 17,250 (-1,750 jobs).
- Information & communication declined sharply in all regions, with the South dropping from 6,875 to 4,625 (-2,250 jobs), the East from 6,500 to 4,550 (-1,950 jobs), and the North from 4,975 to 3,600 (-1,375 jobs).
- Retail employment fell in all three regions, most notably in the North from 21,500 to 19,000 (-2,500 jobs). The South declined from 21,750 to 20,500 (-1,250 jobs), and the East from 24,375 to 23,750 (-625 jobs).

Source: Business Register and Employment Survey, ONS, 2025



Employment estimates by sector – 4UA

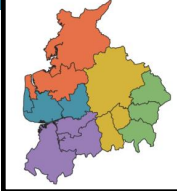
Employment by Sector	North			South			East			West		
Year	2019	2023	2019-23	2019	2023	2019-23	2019	2023	2019-23	2019	2023	2019-23
Agriculture, forestry & fishing	3,950	4,250	1.8%	3,900	3,900	0.0%	1,610	1,655	0.7%	2,055	1,920	-1.7%
Mining, quarrying & utilities	2,825	3,100	2.3%	2,590	1,445	-13.6%	1,270	1,270	0.0%	1,080	1,125	1.0%
Manufacturing	14,250	15,500	2.1%	18,000	16,750	-1.8%	36,500	36,000	-0.3%	16,250	17,250	1.5%
Construction	9,125	9,625	1.3%	16,250	12,250	-6.8%	7,250	9,750	7.7%	5,625	6,500	3.7%
Motor trades	4,350	3,800	-3.3%	4,250	3,650	-3.7%	4,600	3,800	-4.7%	2,725	2,100	-6.3%
Wholesale	8,625	9,125	1.4%	7,750	7,625	-0.4%	10,625	9,625	-2.4%	3,450	3,525	0.5%
Retail	16,375	15,250	-1.8%	13,000	13,000	0.0%	22,750	21,500	-1.4%	15,000	13,500	-2.6%
Transport & storage (inc postal)	7,400	6,075	-4.8%	8,750	8,250	-1.5%	8,475	5,725	-9.3%	5,100	3,150	-11.3%
Accommodation & food services	12,250	13,500	2.5%	10,250	11,250	2.4%	8,875	11,000	5.5%	15,250	16,250	1.6%
Information & communication	3,175	3,075	-0.8%	4,125	3,250	-5.8%	4,450	4,225	-1.3%	2,200	2,225	0.3%
Financial & insurance	3,550	3,230	-2.3%	1,975	1,760	-2.8%	1,965	1,500	-6.5%	1,720	1,330	-6.2%
Property	2,625	2,675	0.5%	2,225	2,575	3.7%	2,295	3,135	8.1%	1,375	1,400	0.5%
Professional, scientific & technical	11,125	12,375	2.7%	8,750	8,500	-0.7%	9,825	9,650	-0.4%	10,000	13,000	6.8%
Business administration & support services	15,700	15,250	-0.7%	9,500	11,000	3.7%	12,375	12,375	0.0%	7,150	7,375	0.8%
Public administration & defence	11,200	16,300	9.8%	5,525	4,050	-7.5%	6,225	6,075	-0.6%	9,575	11,375	4.4%
Education	19,250	19,875	0.8%	10,500	12,250	3.9%	16,375	17,125	1.1%	9,500	10,375	2.2%
Health	30,000	30,500	0.4%	19,500	20,500	1.3%	30,250	32,875	2.1%	24,000	24,250	0.3%
Arts, entertainment, recreation & other services	6,625	6,625	0.0%	6,000	5,500	-2.2%	8,025	7,650	-1.2%	7,500	8,125	2.0%

Source: Business Register and Employment Survey, ONS, 2025



Employment estimates by sector – 4UA

- Between 2015 and 2023, total employment in the North rose from 173,000 to 190,500 (+17,500 jobs), making it the region with the strongest overall growth. The South saw a modest increase from 146,500 to 147,500 (+1,000 jobs), indicating relative stability.
- In the East, employment grew from 190,500 to 194,500 (+4,000 jobs), whilst the West experienced a rise from 135,500 to 144,500 (+9,000 jobs).
- Between 2015 and 2023, Professional, scientific & technical roles in the North rose dramatically from 7,625 to 12,375 (+4,750 jobs), making it the region's fastest-growing sector. The South also saw growth, from 7,625 to 8,500 (+875 jobs), while the East increased from 9,325 to 9,650 (+325 jobs). The West experienced a strong rise from 9,750 to 13,000 (+3,250 jobs).
- Construction employment in the East increased from 6,950 to 9,750 (+2,800 jobs), the highest regional growth in this sector. The West followed with an increase from 5,125 to 6,500 (+1,375 jobs), while the North grew from 7,750 to 9,625 (+1,875 jobs). In contrast, the South declined from 15,250 to 12,250 (-3,000 jobs).
- Business administration & support services in the West grew from 5,625 to 7,375 (+1,750 jobs), while the South saw a notable rise from 10,250 to 11,000 (+750 jobs). The North increased modestly from 13,750 to 15,250 (+1,500 jobs), and the East remained flat at 13,000.
- Information & communication declined sharply in all regions, with the West dropping from 3,600 to 2,225 (-1,375 jobs), the East from 5,950 to 4,225 (-1,725 jobs), the South from 4,875 to 3,250 (-1,625 jobs), and the North from 3,925 to 3,075 (-850 jobs).



Employment estimates by sector – 5UA

Employment by Sector	North			South			East			West			Middle		
Year	2019	2023	2019-23	2019	2023	2019-23	2019	2023	2019-23	2019	2023	2019-23	2019	2023	2019-23
Agriculture, forestry & fishing	3,000	3,125	1.0%	3,900	3,900	0.0%	1,110	1,155	1.0%	1,380	1,420	0.7%	2,125	2,125	0.0%
Mining, quarrying & utilities	2,175	1,900	-3.3%	2,590	1,445	-13.6%	470	470	0.0%	1,280	1,850	9.6%	1,250	1,275	0.5%
Manufacturing	6,500	6,750	0.9%	18,000	16,750	-1.8%	20,500	19,000	-1.9%	16,500	18,000	2.2%	23,500	25,000	1.6%
Construction	5,000	5,750	3.6%	16,250	12,250	-6.8%	4,375	4,875	2.7%	8,125	8,750	1.9%	4,500	6,500	9.6%
Motor trades	2,275	1,775	-6.0%	4,250	3,650	-3.7%	2,150	1,700	-5.7%	4,200	3,575	-3.9%	3,050	2,650	-3.5%
Wholesale	3,000	2,750	-2.2%	7,750	7,625	-0.4%	5,125	4,750	-1.9%	7,575	8,650	3.4%	7,000	6,125	-3.3%
Retail	10,500	9,750	-1.8%	13,000	13,000	0.0%	11,500	11,250	-0.5%	18,500	16,750	-2.5%	13,625	12,500	-2.1%
Transport & storage (inc postal)	3,500	2,975	-4.0%	8,750	8,250	-1.5%	4,100	2,725	-9.7%	8,100	5,550	-9.0%	5,275	3,700	-8.5%
Accommodation & food services	8,000	9,250	3.7%	10,250	11,250	2.4%	4,750	6,125	6.6%	16,250	17,250	1.5%	7,375	8,125	2.5%
Information & communication	1,575	1,750	2.7%	4,125	3,250	-5.8%	2,725	2,275	-4.4%	3,500	3,225	-2.0%	2,025	2,275	3.0%
Financial & insurance	1,220	1,305	1.7%	1,975	1,760	-2.8%	1,035	730	-8.4%	3,750	3,025	-5.2%	1,230	1,000	-5.0%
Property	1,250	1,250	0.0%	2,225	2,575	3.7%	1,105	1,160	1.2%	2,275	2,475	2.1%	1,665	2,325	8.7%
Professional, scientific & technical	5,750	6,125	1.6%	8,750	8,500	-0.7%	4,375	4,500	0.7%	13,750	17,125	5.6%	7,075	7,275	0.7%
Business administration & support services	4,650	5,125	2.5%	9,500	11,000	3.7%	6,000	5,125	-3.9%	17,250	16,000	-1.9%	7,325	8,750	4.5%
Public administration & defence	2,450	5,000	19.5%	5,525	4,050	-7.5%	1,775	1,450	-4.9%	17,625	21,875	5.5%	5,150	5,425	1.3%
Education	12,500	13,000	1.0%	10,500	12,250	3.9%	8,125	8,500	1.1%	14,000	14,875	1.5%	10,500	11,000	1.2%
Health	14,250	15,000	1.3%	19,500	20,500	1.3%	12,250	12,125	-0.3%	36,750	37,250	0.3%	21,000	23,250	2.6%
Arts, entertainment, recreation & other services	4,000	4,000	0.0%	6,000	5,500	-2.2%	4,025	3,900	-0.8%	8,750	9,500	2.1%	5,375	5,000	-1.8%

Source: Business Register and Employment Survey, ONS, 2025



Employment estimates by sector – 5UA

- Between 2015 and 2023, total employment in the North rose from 91,000 to 96,500 (+5,500 jobs), The South saw a modest increase from 146,500 to 147,500 (+1,000 jobs). In contrast, the East experienced a decline from 95,500 to 91,500 (-4,000 jobs), suggesting contraction in regional employment. The West recorded the strongest growth, rising from 188,000 to 207,000 (+19,000 jobs), whilst the Middle option increased from 124,500 to 134,500 (+10,000 jobs), highlighting robust employment gains
- Between 2015 and 2023, Manufacturing in the Middle grew strongly from 22,500 to 25,000 (+2,500 jobs), making it the region's fastest-growing sector. The North and West also saw solid gains, rising from 6,250 to 6,750 (+500 jobs) and 16,750 to 18,000 (+1,250 jobs) respectively. The South increased from 16,250 to 16,750 (+500 jobs), while the East declined slightly from 19,250 to 19,000 (-250 jobs).
- Between 2015 and 2023, Retail employment in the East rose from 10,625 to 11,250 (+625 jobs). The North and South experienced modest declines, falling from 10,250 to 9,750 (-500 jobs) and 13,250 to 13,000 (-250 jobs) respectively. The Middle dropped from 13,750 to 12,500 (-1,250 jobs), while the West saw the steepest fall from 19,750 to 16,750 (-3,000 jobs).



Employment estimates by sector – 4UA B

Employment by Sector	North			South			East			West		
Year	2019	2023	2019-23	2019	2023	2019-23	2019	2023	2019-23	2019	2023	2019-23
Agriculture, forestry & fishing	2,470	2,680	2.1%	3,900	3,900	0.0%	2,820	2,850	0.2%	2,325	2,300	-0.3%
Mining, quarrying & utilities	1,875	1,750	-1.7%	1,500	1,500	-14.1%	1,625	1,750	1.9%	1,750	2,250	6.5%
Manufacturing	4,750	5,000	1.3%	17,000	17,000	-0.7%	43,000	42,500	-0.3%	19,000	21,000	2.5%
Construction	4,500	5,000	2.7%	12,000	12,000	-7.7%	8,000	10,500	7.0%	9,000	10,500	3.9%
Motor trades	1,875	1,500	-5.4%	3,500	3,500	-4.7%	5,000	4,250	-4.0%	4,750	4,000	-4.2%
Wholesale	2,750	2,500	-2.4%	7,500	7,500	0.0%	11,500	10,500	-2.2%	8,500	9,500	2.8%
Retail	8,000	7,500	-1.6%	13,000	13,000	0.0%	24,500	23,500	-1.0%	21,500	19,500	-2.4%
Transport & storage (inc postal)	3,250	2,750	-4.1%	8,000	8,000	-2.9%	9,000	6,000	-9.6%	8,500	6,000	-8.3%
Accommodation & food services	7,500	8,000	1.6%	11,500	11,500	2.3%	11,000	13,000	4.3%	18,500	19,500	1.3%
Information & communication	1,375	1,625	4.3%	3,250	3,250	-5.1%	4,500	4,500	0.0%	3,750	3,500	-1.7%
Financial & insurance	1,125	1,250	2.7%	1,750	1,750	-3.3%	2,125	1,625	-6.5%	4,000	3,250	-5.1%
Property	1,125	1,125	0.0%	2,500	2,500	2.7%	2,500	3,250	6.8%	2,500	2,750	2.4%
Professional, scientific & technical	5,000	5,000	0.0%	8,500	8,500	-1.4%	11,000	11,500	1.1%	15,000	18,500	5.4%
Business administration & support services	4,500	5,000	2.7%	11,000	11,000	3.7%	13,000	13,500	0.9%	18,000	16,500	-2.2%
Public administration & defence	1,625	1,625	0.0%	4,000	4,000	-7.7%	7,000	7,000	0.0%	18,500	25,000	7.8%
Education	11,500	12,000	1.1%	12,000	12,000	3.4%	17,500	18,000	0.7%	16,000	17,000	1.5%
Health	11,000	11,500	1.1%	20,500	20,500	1.3%	33,000	35,000	1.5%	40,000	41,000	0.6%
Arts, entertainment, recreation & other services	3,000	3,250	2.0%	5,500	5,500	-2.2%	9,000	8,500	-1.4%	10,500	10,500	0.0%

Notes: Data for 01000 : DEFRA/Scottish Executive Agricultural Data are unavailable below district level. Therefore we have proxied estimates for the agriculture sector by using the proportion of employment each district makes up within agriculture, and then taken this proportion. Then to estimate within Ribble Valley and Wyre, we have taken the percentage of overall employment for example Urban Wyre makes in Wyre and then multiplied this by the proportion agricultural employment within Wyre.
Source: Business Register and Employment Survey, ONS, 2025



Employment estimates by sector – 4UA B

- From 2019 to 2023, total employment in the North increased slightly from 75,000 to 76,500, averaging 0.5% annual growth between 2019 and 2023. Education led with 12,000 jobs, followed closely by Health with 11,500 jobs and Retail with 7,500. The fastest growing sector was Information and Communications, which grew by 4.3% annually between 2019 and 2023 although over the last year there has been a fall of 375 IT jobs. While Transport roles notably declined by 4.1% annually.
- During the same period, total employment in the South decreased from 148,500 to 144,000, an annual decline of 0.8%. Health was the largest sector with 20,500 jobs, making up 14% of total employment, followed by Manufacturing at 17,000 and Retail at 13,000 (combined retail and wholesale employed 24,000 people). Business administration & support services experienced the fastest growth at 3.7% annually with education also growing strongly, whereas Mining, quarrying & utilities saw a significant drop of 14% annually. Construction also experienced a significant drop in employment of 8% annually.
- Employment in the East rose marginally from 214,000 to 215,000 between 2019 and 2023. Manufacturing was the largest sector with 42,500 jobs, making up a fifth of total employment in the East. This is followed by Health with 35,000 jobs making up 16% of employment. Retail makes up 11% of employment 23,500 jobs. Construction showed the highest growth at 7.0% annually between 2019 and 2023, with strong growth in accommodation and food services. While Transport & storage experienced the steepest decline of 9.6% annually followed by finance and insurance with declines of 6.5% annually.
- In the West, total employment grew from 220,000 to 230,500, a 1.2% annual rise between 2019 and 2023. Health was the largest sector with 41,000 jobs, accounting for 18% of total employment, followed by Wholesale and retail trade at 33,000 (14% of total employment), and Public administration & defence with 25,000 jobs (11% of total employment). Public administration & defence was the fastest growing sector with a 7.8% annual increase, while Transport & storage saw the largest annual decline at 8.3%.

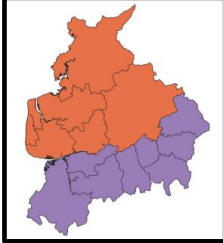
Business estimates by sector

Lancashire has a stronger presence in agriculture businesses compared to the North West, with 6.42% of its businesses in this sector compared to just over 4% in the North West. Lancashire also has a greater proportion of manufacturing and construction businesses. Conversely, Lancashire lags behind in information and communication, with only 4.11% of businesses in this sector versus 5.16% regionally. Similarly, professional, scientific and technical activities are less prevalent in Lancashire (12.22%) than in the North West overall (14.31%).

Businesses by Sector (Lancashire 2024)



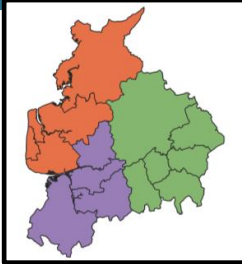
- Manufacturing for Burnley (9.3%, 245 businesses) and Hyndburn (not shown here but 9.7%) stand out for their industrial base. Blackburn with Darwen also has a high count (450 businesses) and percentage (8.2%), reinforcing its manufacturing legacy.
- The construction sector is widely distributed, with Chorley (16.1%, 725 businesses) and South Ribble (16.8%, 660 businesses) leading both in share and volume. Lancaster (13.9%, 650 businesses) and West Lancashire (14.0%, 650 businesses) also show strong construction activity, indicating active development across the county.
- Blackburn with Darwen dominates with 25.6% and 1,405 retail businesses, followed by Preston (20.2%, 1,150 businesses) and Burnley (21.2%, 560 businesses). These figures highlight the retail intensity in urban centres.
- Fylde (17.0%, 580 businesses) and Chorley (13.9%, 625 businesses) lead professional business services. Preston (13.6%, 775 businesses) has the highest count, indicating a concentration of consultancy and technical services. Blackpool, with only 8.2% and 315 businesses, lags behind.



Businesses by sector – 2UA

Businesses by Sector (2024)	North	South
Agriculture, forestry and fishing	1,950	1,030
Mining and quarrying	0	0
Manufacturing	1,610	1,965
Electricity, gas, steam and air conditioning supply	40	20
Water supply; sewerage, waste management and remediation activities	100	110
Construction	3,850	3,675
Wholesale and retail trade; repair of motor vehicles and motorcycles	5,040	5,115
Transportation and storage	1,150	1,195
Accommodation and food service activities	2,470	1,750
Information and communication	1,170	1,015
Financial and insurance activities	475	525
Real estate activities	1,260	1,000
Professional, scientific and technical activities	3,390	3,070
Administrative and support service activities	2,195	2,220
Public administration and defence; compulsory social security	95	50
Education	450	435
Human health and social work activities	1,320	1,260
Arts, entertainment and recreation	625	545
Other service activities	1,190	1,160

- In both the North and South, Wholesale and Retail consistently led in business counts; rising in the North from 4,880 businesses in 2015 to 5,040 by 2024, and 4,650 to 5,115 in the South.
- Professional, scientific and technical activities also ranked among the top sectors, beginning with 3,530 businesses in 2015 and ending slightly lower at 3,390 in 2024 in the North. In the South, is broadly equivalent in size at 3,070 by 2024
- Construction has been a significant growth sector, rising from 3,050 businesses in 2015 to 3,850 in 2024 (+800 businesses) in the North, and increasing from 2,780 businesses in 2015 to 3,675 in 2024 (+895 businesses) in the South.

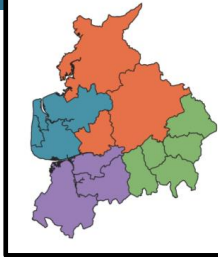


Businesses by sector – 3UA

Businesses by Sector	North	South	East
Agriculture, forestry and fishing	1,060	910	1,010
Mining and quarrying	0	0	0
Manufacturing	855	1,120	1,600
Electricity, gas, steam and air conditioning supply	20	15	25
Water supply; sewerage, waste management and remediation activities	70	70	70
Construction	2,250	2,775	2,500
Wholesale and retail trade; repair of motor vehicles and motorcycles	2,680	3,275	4,200
Transportation and storage	605	975	765
Accommodation and food service activities	1,645	1,120	1,455
Information and communication	690	810	685
Financial and insurance activities	245	385	370
Real estate activities	655	825	780
Professional, scientific and technical activities	1,845	2,440	2,175
Administrative and support service activities	1,235	1,600	1,580
Public administration and defence; compulsory social security	50	45	50
Education	245	330	310
Human health and social work activities	710	845	1,025
Arts, entertainment and recreation	400	415	355
Other service activities	680	820	850

- Wholesale and retail trade was the largest sector in all UAs throughout the period.
- Construction was the fastest growing sector by business counts across all UAs. In the South Construction saw a significant rise from 2,070 in 2015 to 2,775 businesses (+705), whilst in the East it rose rom 1,900 to 2,500 businesses (+600).
- Professional services are significant in all regions, with the South showing the highest business counts.

Source: Business Counts, ONS, 2025



Businesses by sector – 4UA

Businesses by Sector (2024)	North	South	East	West
Agriculture, forestry and fishing	1,060	735	465	590
Mining and quarrying	0	0	0	0
Manufacturing	855	845	1,400	620
Electricity, gas, steam and air conditioning supply	20	5	20	15
Water supply; sewerage, waste management and remediation activities	70	50	65	50
Construction	2,250	2,035	2,065	1,600
Wholesale and retail trade; repair of motor vehicles and motorcycles	2,680	2,125	3,620	1,975
Transportation and storage	605	680	685	440
Accommodation and food service activities	1,645	765	1,210	1,175
Information and communication	690	560	565	475
Financial and insurance activities	245	260	300	170
Real estate activities	655	520	600	480
Professional, scientific and technical activities	1,845	1,665	1,725	1,325
Administrative and support service activities	1,235	1,150	1,310	890
Public administration and defence; compulsory social security	50	35	30	35
Education	245	240	240	160
Human health and social work activities	710	515	910	505
Arts, entertainment and recreation	400	320	280	295
Other service activities	680	580	710	480

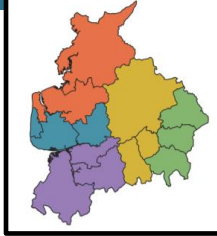
- The East region stands out as the most dominant in wholesale and retail trade, boasting 3,620 businesses in 2024. The West has the smallest footprint in this sector.
- The North region leads in construction business counts with 2,250 enterprises in 2024. The East follows closely with 2,065 businesses, having experienced a notable surge in 2018 that significantly boosted its sector strength.
- In professional, scientific and technical activities, the North again leads with 1,845 businesses, underscoring its strength in knowledge-based industries.



Businesses by sector – 5UA

Businesses by Sector (2024)	North	South	East	West	Middle
Agriculture, forestry and fishing	1,060	735	330	365	375
Mining and quarrying	0	0	0	0	0
Manufacturing	855	845	720	640	330
Electricity, gas, steam and air conditioning supply	20	5	15	20	0
Water supply; sewerage, waste management and remediation activities	70	50	35	50	20
Construction	2,250	2,035	1,185	1,675	650
Wholesale and retail trade; repair of motor vehicles and motorcycles	2,680	2,125	1,690	2,405	745
Transportation and storage	605	680	365	600	315
Accommodation and food service activities	1,645	765	605	1,220	255
Information and communication	690	560	315	590	160
Financial and insurance activities	245	260	120	255	75
Real estate activities	655	520	285	650	200
Professional, scientific and technical activities	1,845	1,665	895	1,670	545
Administrative and support service activities	1,235	1,150	665	1,065	440
Public administration and defence; compulsory social security	50	35	25	25	10
Education	245	240	125	205	85
Human health and social work activities	710	515	425	675	165
Arts, entertainment and recreation	400	320	155	285	90
Other service activities	680	580	370	560	185

Source: Business Counts, ONS, 2025



Businesses by sector – 5UA

- In 2024, the Construction sector exhibited notable variation across the five regions. The North led with 2,250 businesses, reflecting a strong recovery and sustained growth following earlier volatility. The South followed closely with 2,035 businesses, showing consistent expansion and stability over the decade. The West maintained a solid presence with 1,675 businesses, having grown gradually year-on-year, indicating a reliable construction market. The East recorded 1,185 businesses, showing moderate growth with a notable spike in 2018 that suggests a temporary surge. The Middle region trailed with 650 businesses, indicating a smaller construction footprint and limited but consistent activity likely focused on local developments
- The Wholesale and Retail Trade sector was most dominant in the East in 2024, with 3,620 businesses, highlighting its vibrant commercial activity and strong consumer base. The North followed with 2,680 businesses, showing a robust retail sector that rebounded after early fluctuations. The West had 2,405 businesses, maintaining a stable retail presence with a consistent upward trend. The South recorded 2,125 businesses, reflecting a stable but less dynamic retail landscape compared to the East and North. The Middle region had the smallest retail footprint with 745 businesses.
- In 2024, the Professional, Scientific and Technical Activities sector was strongest in the North with 1,845 businesses, underscoring its strength in knowledge-based industries. The West followed closely with 1,670 businesses, showing consistent performance and a solid professional services base. The South had 1,665 businesses, maintaining a stable presence in this sector. The East recorded 895 businesses, indicating a smaller but steady professional sector with a peak in 2018 suggesting a temporary boost. The Middle region had the smallest share with 545 businesses, reflecting fewer institutions or lower demand for specialised services.

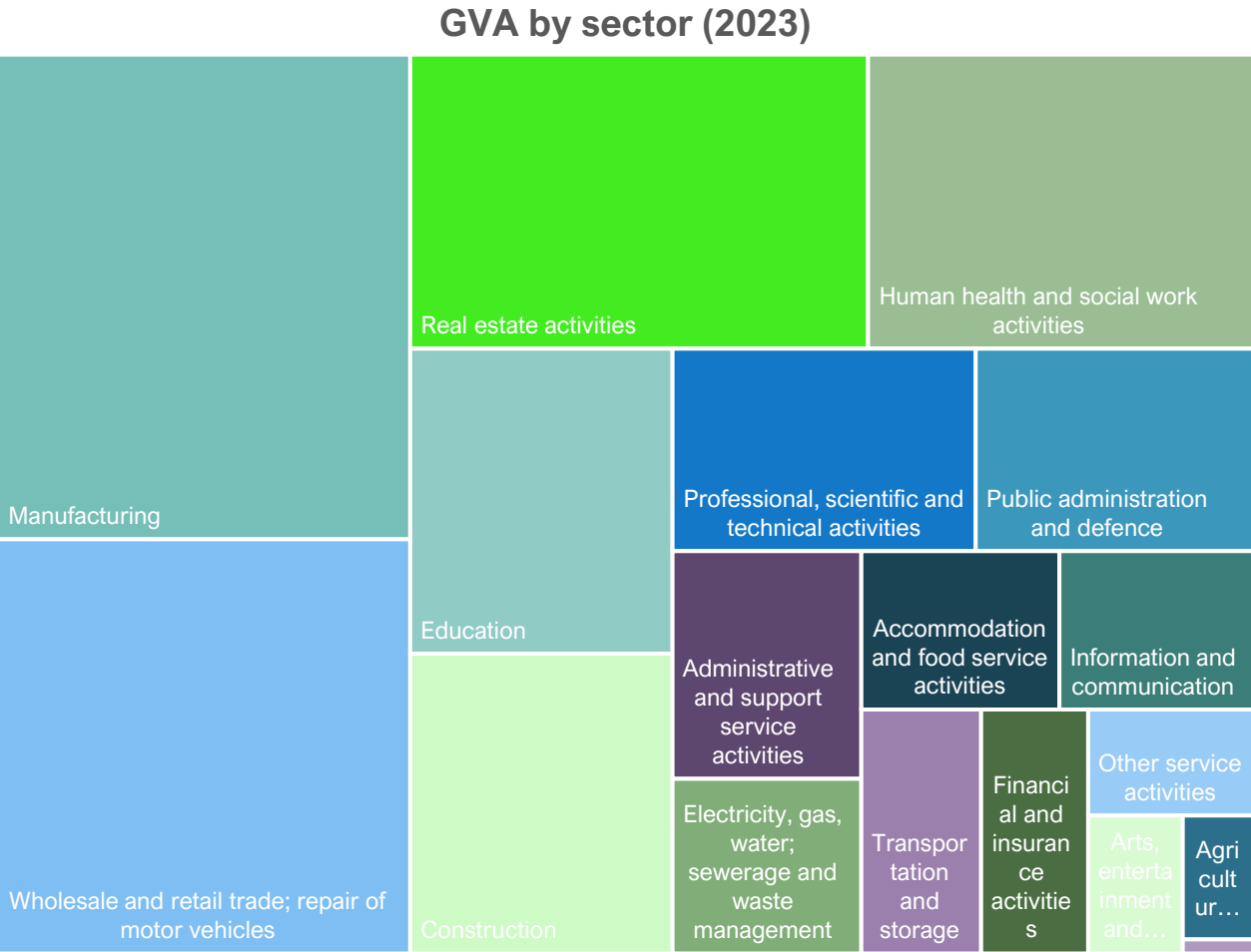


Business estimates by sector – 4UA B

Businesses by Sector (2024)	North	South	East	West
Agriculture, forestry and fishing	1,210	735	645	390
Mining and quarrying	0	0	0	0
Manufacturing	400	845	1,530	795
Electricity, gas, steam and air conditioning supply	5	5	20	25
Water supply; sewerage, waste management and remediation activities	30	45	70	65
Construction	1,085	2,035	2,340	2,065
Wholesale and retail trade; repair of motor vehicles and motorcycles	1,150	2,130	4,025	2,855
Transportation and storage	240	680	735	680
Accommodation and food service activities	695	765	1,345	1,405
Information and communication	300	565	645	675
Financial and insurance activities	105	260	355	275
Real estate activities	285	520	725	740
Professional, scientific and technical activities	835	1,665	2,040	1,920
Administrative and support service activities	575	1,150	1,470	1,210
Public administration and defence; compulsory social security	45	35	40	25
Education	125	240	290	230
Human health and social work activities	285	515	1,005	780
Arts, entertainment and recreation	160	320	330	355
Other service activities	290	580	820	665

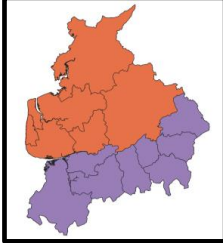
- In 2024 the East has the highest overall business count at 18,435, driven by strong representation in Construction (2,340 businesses), Retail (2,070), and Professional, scientific & technical services (2,040). Manufacturing is also significant with 1,530 businesses, highlighting a diverse industrial base.
- The North, with 7,825 businesses, shows a distinct rural profile, dominated by Agriculture (1,210 businesses). Construction (1,085) and Professional services (835) follow, while sectors like Mining and Public administration have a lower business presence.
- The South totals 13,085 businesses, led by Construction (2,035) and Professional services (1,665). Retail (1,000) and Manufacturing (845) are notable contributors, suggesting a balanced mix of service and production industries.
- The West records 15,165 businesses, with Construction (2,065) and Professional services (1,920) as leading sectors. Retail (1,680) and Accommodation & food services (1,405) indicate a strong consumer and hospitality economy.
- Across all areas, Construction (12.5%-15.5% of total businesses) and Professional services (11-12.5% of total businesses) consistently rank among the top sectors, while Agriculture dominates in the North (15.5% of total businesses), and Retail and hospitality are particularly strong in East and West – retail accounts for 11% of businesses in both East and West UAs, hospitality around 9% for both UAs.

GVA by sector



- In 2023, Lancashire's economy was driven primarily by three major sectors. Manufacturing led the way with a Gross Value Added (GVA) of £7bn, making it the most significant contributor to the region's output (18% of total economy). Despite a dip during the 2008–2009 financial crisis, the sector rebounded strongly and remains the largest contributor, with annual growth of 1.8% over the 25 years
- Wholesale and retail is the second largest sector at £6bn and has continued to see growth, averaging 2.3% between 1998 and 2023.
- The third largest contributor was real estate activities, generating £4.7bn, underscoring the importance of property and land-related economic activity in the area.
- Human health and social work activities have grown to £4bn driven by rising demand for healthcare and social services.
- Professional, scientific and technical activities has growing significantly by 6% a year highlighting the rise of knowledge-based industries.
- Transport and accommodation services have seen slight falls in value.

Source: Regional gross value added (balanced) by industry, ONS, 2025

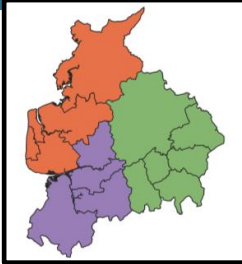


GVA by Sector – 2UA

GVA by Sector (2023) (£m)	North	South
All industries	18,631	20,964
Agriculture, forestry and fishing; mining and quarrying	184	122
Manufacturing	2,817	4,200
Electricity, gas, water; sewerage and waste management	699	458
Construction	1,006	1,750
Wholesale and retail trade; repair of motor vehicles	2,425	3,570
Transportation and storage	377	648
Accommodation and food service activities	658	442
Information and communication	388	688
Financial and insurance activities	375	540
Real estate activities	2,233	2,491
Professional, scientific and technical activities	1,061	1,093
Administrative and support service activities	695	813
Public administration and defence	1,375	595
Education	1,510	1,294
Human health and social work activities	2,246	1,729
Arts, entertainment and recreation	290	168
Other service activities	275	339
Activities of households	15	20

Source: Regional gross value added (balanced) by industry, ONS, 2025

- Manufacturing has consistently been the dominant sector in both regions. The South maintained a higher GVA throughout the period, rising by 2.3% a year over the last 25 years to £4.20bn. The North also saw strong growth of 1.2% a year to £2.82bn in 2023, with a notable dip during the 2008–2009 financial crisis followed by a steady recovery. Manufacturing accounts for a fifth of the economy in the South and 15% in the North.
- Wholesale and retail have also seen strong growth in both UAs of 2.8% a year in the South to £3.57bn in 2023 and by 1.8% a year to £2.43bn in the North. The growth reflects increased consumer activity and retail development
- Health is another one of the largest contributors to the total economy, making up 12% on the North and 8% in the South – 0.8% annual growth in the North and more modest growth of 0.3% a year in the South.
- Construction is another significant contributor particularly in the South at 8% of the total economy, with growth of 0.5% a year. Whereas the sector is smaller in the North at 5.5% of the total economy, where the sector has shrunk somewhat over the last 25 years. The South’s steeper rise suggests more intensive infrastructure and housing development.
- IT and professional, scientific and technical activities have seen strong growth reflecting their increasing importance to the local economy.
- Real estate an important sector across UAs, representing significant value to the total economy.

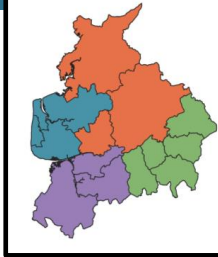


GVA by Sector – 3UA

GVA by Sector (2023)(£m)	North	South	East
All industries	11,418	15,496	12,681
Agriculture, forestry and fishing; mining and quarrying	100	122	84
Manufacturing	1,698	2,105	3,214
Electricity, gas, water; sewerage and waste management	634	354	169
Construction	552	1,416	788
Wholesale and retail trade; repair of motor vehicles	1,320	2,459	2,216
Transportation and storage	223	510	292
Accommodation and food service activities	489	330	281
Information and communication	231	373	472
Financial and insurance activities	195	420	300
Real estate activities	1,422	2,004	1,298
Professional, scientific and technical activities	802	863	489
Administrative and support service activities	277	813	418
Public administration and defence	680	917	373
Education	927	1,091	786
Human health and social work activities	1,527	1,295	1,153
Arts, entertainment and recreation	173	164	121
Other service activities	155	246	213
Activities of households	11	12	12

- Manufacturing remained a dominant sector across all three UAs, particularly for the East where manufacturing accounts for a quarter of the economy, followed by 15% in the North and 14% in the South.
- Wholesale and retail is another big sector across UAs. The sector accounts for 17.5% of the economy in the East, 16% in the South and 12% in the North. Combined manufacturing and wholesale and retail accounts for nearly half of the £12.7bn economy.
- Health and social care accounts for at least 8% of the total economy in the South up to 13% in the North.
- Construction accounts for 9% of the total economy in the South, less of significant in the East at 6% and 55 in the North
- Real estate an important sector across UAs, representing significant value to the total economy.
- Transport and storage has declined slightly across all UAs along with little change to a slight fall back in the South and East for accommodation and food services.
- IT and professional, scientific and technical services have seen considerable growth over the last 25 years, although from relatively small bases.

Source: Regional gross value added (balanced) by industry, ONS, 2025

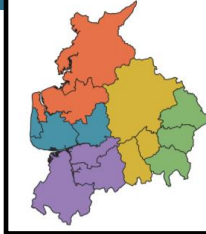


GVA by Sector – 4UA

GVA by Sector (2023)(£m)	North	South	East	West
All industries	10,642	10,326	10,638	7,989
Agriculture, forestry and fishing; mining and quarrying	134	104	18	50
Manufacturing	1,355	1,860	2,340	1,462
Electricity, gas, water; sewerage and waste management	487	313	145	212
Construction	621	1,068	682	385
Wholesale and retail trade; repair of motor vehicles	1,492	1,542	2,028	933
Transportation and storage	292	385	263	85
Accommodation and food service activities	278	222	220	380
Information and communication	266	236	452	122
Financial and insurance activities	279	253	287	96
Real estate activities	1,241	1,461	1,030	992
Professional, scientific and technical activities	490	668	425	571
Administrative and support service activities	487	442	371	208
Public administration and defence	784	269	326	591
Education	1,060	630	664	450
Human health and social work activities	1,041	652	1,077	1,205
Arts, entertainment and recreation	153	54	114	137
Other service activities	177	157	182	98
Activities of households	7	9	11	8

Source: Regional gross value added (balanced) by industry, ONS, 2025

- Manufacturing remains a significant economic contributor across all UAs, contributing at least £1.3bn across each area and up to £2.34 bn in the East. The sector contributes 22% in the East, 18% in the South and West, and 13% in the North.
- Wholesale and retail continues to be a significant contributor across all UAs making up at least £930mn in each UA. The sector is particularly significant to the East’s economy, contributing 19% of the total economy, followed by 15% in South, 14% in North, and 12% in the West.
- Health is another significant sector making up at least £1bn in the West (15% and the second largest sector behind manufacturing), East (10%), North (10%).
- IT and professional, scientific and technical services have seen considerable growth over the last 25 years, although from relatively small bases.
- Real estate an important sector across UAs, representing significant value to the total economy.
- Construction makes up 10% of the total economy in the South, less significant in the North, East and West at between 5-6%.
- Public administration and defence important sectors in the West and North, contributing 7% to each economy.

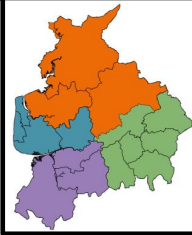


GVA by Sector – 5UA

GVA by Sector (2023)(£m)	North	South	East	West	Middle
All industries	5,312	10,326	5,194	11,276	7,487
Agriculture, forestry and fishing; mining and quarrying	84	104	12	34	72
Manufacturing	511	1,860	1,338	1,432	1,876
Electricity, gas, water; sewerage and waste management	542	313	57	133	112
Construction	355	1,068	332	545	456
Wholesale and retail trade; repair of motor vehicles	674	1,542	1,016	1,563	1,200
Transportation and storage	165	385	102	183	190
Accommodation and food service activities	190	222	114	407	167
Information and communication	135	236	185	233	287
Financial and insurance activities	105	253	158	257	142
Real estate activities	781	1,461	558	1,184	740
Professional, scientific and technical activities	302	668	189	695	300
Administrative and support service activities	101	442	118	547	300
Public administration and defence	160	269	84	1,168	289
Education	599	630	331	789	455
Human health and social work activities	465	652	421	1,705	732
Arts, entertainment and recreation	55	54	79	228	42
Other service activities	84	157	94	160	119
Activities of households	6	9	6	8	6

Source: Regional gross value added (balanced) by industry, ONS, 2025

- Manufacturing remains one of the biggest sectors across all UAs, particularly in the East and Middle where manufacturing contributes a quarter of each economy. In the South, manufacturing contributes 185 of the total economy, 135 in the West and 9.5% in the North.
- Wholesale and retail is strong across all UAs, particularly in the East at a fifth of the total economy, Middle at 16%, South at 15%, West at 14% and North at 13%.
- Health and social care contributes at least £400m in each UA, rising to £1.7bn in the West (15% of total economy) but at least 8% in each area apart from 6% in the South.
- Construction is a notable strength in the South contributing over £1bn to the economy (10% of the total economy). The sector contributes between 6-7% in the remaining UAs apart from 5% in the West.
- Real estate an important sector across UAs, representing significant value to the total economy.
- Education a strength in the North, the second largest sector behind wholesale and retail, contributing 11% of the total economy,



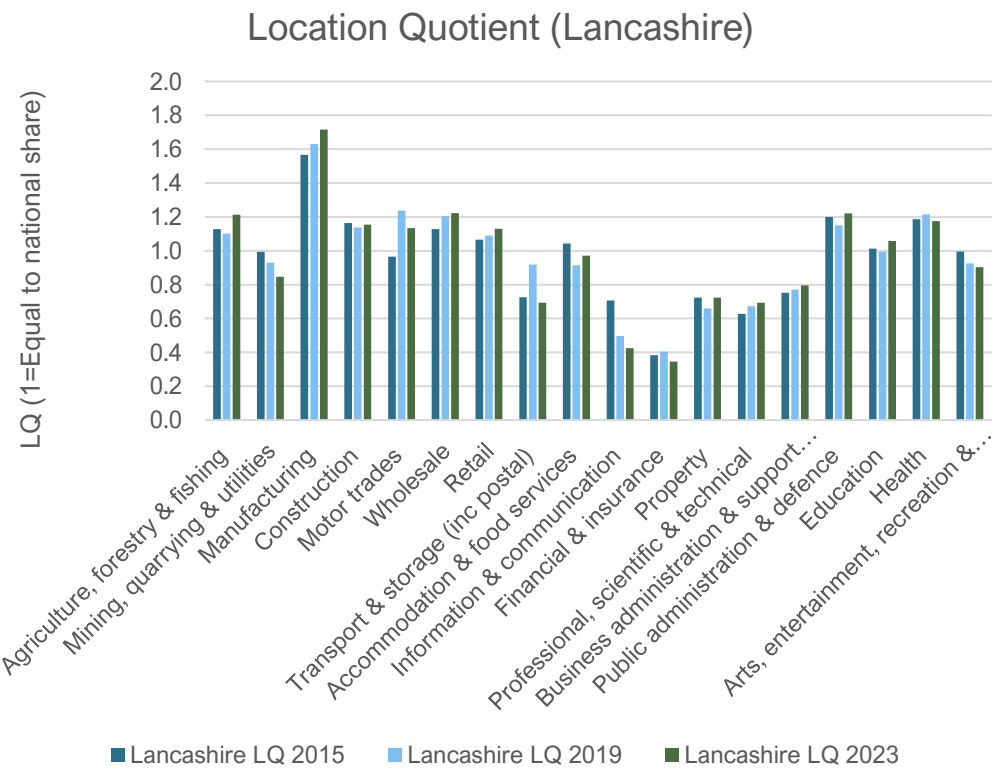
GVA by Sector – 4UA B

GVA by Sector (2023)(£m)	North	South	East	West
All industries	4,978	11,181	13,280	13,640
Agriculture, forestry and fishing; mining and quarrying	72	99	69	55
Manufacturing	567	2,038	3,304	1,750
Electricity, gas, water; sewerage and waste management	611	349	192	263
Construction	271	1,164	830	734
Wholesale and retail trade; repair of motor vehicles	557	1,640	2,330	1,878
Transportation and storage	166	412	304	212
Accommodation and food service activities	165	246	298	514
Information and communication	127	249	484	267
Financial and insurance activities	112	273	320	281
Real estate activities	659	1,588	1,354	1,557
Professional, scientific and technical activities	293	720	512	816
Administrative and support service activities	96	475	436	613
Public administration and defence	131	288	389	1,305
Education	590	685	824	950
Human health and social work activities	432	718	1,268	1,984
Arts, entertainment and recreation	46	57	127	257
Other service activities	79	171	224	195
Activities of households	5	9	14	12

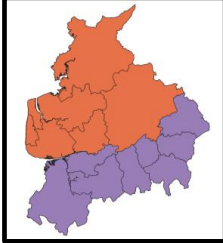
- The East region generates the highest overall GVA in manufacturing (£3.30bn) and wholesale & retail trade (£2.33bn), underlining its strong industrial and commercial base. Combined the sectors contribute almost half of the total economy.
- South follows closely with manufacturing (£2.04bn) and wholesale & retail (£1.64bn) as major contributors, reflecting a similar economic structure. Manufacturing making up 185 and wholesale and retail 15% of the total economy.
- The West stands out for its strength in health and social care (£1.98bn, 14.5% of the total economy) and public administration & defence (£1.30bn, 10% of the total economy), indicating a significant public sector and health economy. Meanwhile, North has a more modest profile, with real estate (£659m) and electricity, gas, water (£611m) as its largest sectors.
- Across all regions, real estate activities consistently deliver high GVA, exceeding £1.3bn in South, East, and West. Conversely, agriculture and mining remains a relatively small contributor with values under £100m across each of the UAs, but agriculture remains an important local employer particularly in the North and South.

Location Quotient

Location Quotients (LQs) are ratios between the local share of employment/business and share of employment/business in GB. Higher LQs correspond to higher levels of specialisation, with an LQ above 1 indicating that the area is more specialised in that sector than GB as a whole. A threshold of above 1.25 signifies the area has a significant specialism.



- Lancashire’s traditional strengths in primary and industrial sectors are evident in the data. Manufacturing stands out with a significant increase in LQ, reinforcing its role as a core sector in the region’s economy. The Electricity, gas, steam and air conditioning supply sector has remained relatively stable, with only a slight decrease in LQ, while Water supply and waste management has significantly increased, possibly reflecting growing environmental and infrastructure demands.
- The Construction sector has experienced a slight increase in its LQ, peaking in 2022, which may reflect regional development and infrastructure investment. Wholesale and retail trade, including vehicle repair, has also seen a modest rise, maintaining its importance in Lancashire’s employment landscape.
- The Information and communication sector has significantly decreased, indicating a weaker presence in digital and tech-related employment compared to national averages. Similarly, Financial and insurance activities have slightly declined, continuing a long-term trend of underrepresentation in Lancashire.
- Real estate activities have remained stable over the period, while Professional, scientific and technical activities have slightly increased, hinting at gradual growth in knowledge-based employment. Administrative and support services also show a small rise, suggesting steady demand for operational and back-office roles.



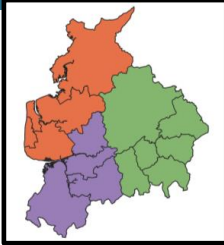
Location Quotient – 2UA

Location Quotient 2023 (change since 2015)

Sector	North	South
Agriculture, forestry and fishing	1.29 (+0.09)	1.13 (+0.08)
Mining and quarrying	0.97 (+0.03)	0.70 (-0.36)
Manufacturing	1.53 (+0.08)	1.93 (+0.23)
Electricity, gas, steam and air conditioning supply	0.99 (+0.08)	1.34 (-0.11)
Water supply; sewerage, waste management and remediation activities	1.04 (+0.15)	1.25 (+0.20)
Construction	1.05 (+0.06)	1.42 (+0.14)
Wholesale and retail trade; repair of motor vehicles and motorcycles	1.06 (-0.01)	1.22 (+0.15)
Transportation and storage	0.55 (-0.05)	0.87 (no change)
Accommodation and food service activities	1.10 (-0.15)	0.82 (+0.01)
Information and communication	0.42 (-0.24)	0.43 (-0.33)
Financial and insurance activities	0.39 (-0.05)	0.29 (-0.03)
Real estate activities	0.59 (-0.13)	0.88 (+0.15)
Professional, scientific and technical activities	0.79 (+0.14)	0.58 (-0.03)
Administrative and support service activities	0.78 (+0.09)	0.81 (no change)
Public administration and defence; compulsory social security	1.68 (+0.06)	0.68 (-0.05)
Education	1.09 (+0.08)	1.02 (no change)
Human health and social work activities	1.17 (no change)	1.19 (-0.02)
Arts, entertainment and recreation	0.94 (-0.16)	0.86 (-0.02)

- In both regions, Agriculture, forestry and fishing maintains a strong presence, with the North slightly ahead with an LQ of 1.29 compared to the South’s 1.13.
- Manufacturing remains a key strength in both regions, with the South leading at 1.93 and the North at 1.53. Both have seen growth, but the South’s increase of +0.23 is notably higher than the North’s +0.08, suggesting a more dynamic expansion in manufacturing employment in the South.
- The Electricity, gas, steam and air conditioning supply sector shows divergent trends. The North has seen a modest increase to 0.99, while the South, despite having a higher LQ of 1.34, has experienced a decline of -0.11. This could reflect structural changes or shifts in energy infrastructure. In contrast, Water supply and waste management has grown in both regions, with the South again leading at 1.25 (+0.20) and the North at 1.04 (+0.15), indicating rising employment in environmental services across the board.
- The Construction sector shows above average concentrations in both regions. The North stands at 1.05 with a modest increase of +0.06, while the South is significantly higher at 1.42, with growth of +0.14. This suggests more robust construction growth in the South, possibly tied to infrastructure development or housing expansion.

Notes: those in green have an LQ of 1.25 or above
Source: Business Register and Employment Survey, ONS, 2025



Location Quotient – 3UA

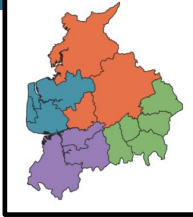
Location Quotient 2023 (change since 2015)

Sector	North	South	East
Agriculture, forestry and fishing	1.30 (+0.11)	1.32 (+0.07)	1.02 (+0.07)
Mining and quarrying	1.06 (-0.20)	0.86 (-0.31)	0.64 (+0.06)
Manufacturing	1.35 (+0.09)	1.17 (+0.11)	2.65 (+0.28)
Electricity, gas, steam and air conditioning supply	0.95 (+0.08)	1.44 (-0.32)	1.03 (+0.23)
Water supply; sewerage, waste management and remediation activities	0.91 (+0.12)	1.35 (+0.18)	1.11 (+0.19)
Construction	0.66 (no change)	1.59 (+0.24)	1.33 (+0.03)
Wholesale and retail trade; repair of motor vehicles and motorcycles	1.12 (no change)	1.01 (+0.05)	1.27 (+0.15)
Transportation and storage	0.55 (-0.06)	0.92 (+0.04)	0.57 (-0.08)
Accommodation and food service activities	1.34 (-0.12)	0.82 (-0.08)	0.80 (-0.03)
Information and communication	0.40 (-0.40)	0.42 (-0.31)	0.45 (-0.28)
Financial and insurance activities	0.36 (-0.10)	0.44 (+0.02)	0.23 (-0.04)
Real estate activities	0.58 (-0.05)	0.80 (-0.01)	0.77 (+0.05)
Professional, scientific and technical activities	0.91 (+0.18)	0.63 (+0.03)	0.56 (no change)
Administrative and support service activities	0.64 (+0.06)	1.00 (+0.07)	0.72 (-0.01)
Public administration and defence; compulsory social security	1.38 (+0.04)	1.60 (+0.01)	0.67 (no change)
Education	1.17 (+0.04)	0.99 (+0.13)	1.04 (-0.04)
Human health and social work activities	1.23 (0.02)	1.15 (no change)	1.15 (-0.04)
Arts, entertainment and recreation	1.12 (+0.07)	0.76 (-0.18)	0.86 (-0.03)

- Manufacturing remains a pillar of the economy, especially in the East where the LQ surged to 2.65, up by 0.28. The North and South also saw increases, reaching 1.35 and 1.17 respectively, reinforcing the sector’s widespread importance and growth across Lancashire.
- Construction remained unchanged in the North, but rose in the South and East, with the South showing the strongest growth. This may reflect regional development initiatives or housing demand.
- Wholesale and retail trade saw modest increases in the South and East, while the North remained stable, suggesting consistent consumer and commercial activity.
- Accommodation and food services rose in the North but declined in the South and East, possibly reflecting tourism or local economic conditions.

Location Quotient – 4UA

Location Quotient 2023 (change since 2015)



Sector	North	South	East	West
Agriculture, forestry and fishing	1.56 (+0.14)	1.85 (+0.17)	0.60 (+0.04)	0.93 (-0.03)
Mining and quarrying	1.34 (+0.04)	0.81 (-0.71)	0.54 (-0.04)	0.64 (+0.02)
Manufacturing	1.11 (+0.15)	1.54 (+0.16)	2.52 (+0.24)	1.62 (+0.08)
Electricity, gas, steam and air conditioning supply	1.04 (+0.08)	1.70 (-0.53)	1.03 (+0.25)	0.92 (+0.11)
Water supply; sewerage, waste management and remediation activities	1.15 (+0.18)	1.42 (+0.22)	1.12 (+0.18)	0.83 (+0.10)
Construction	1.33 (+0.11)	1.43 (+0.25)	1.37 (+0.03)	0.68 (+0.01)
Wholesale and retail trade; repair of motor vehicles and motorcycles	0.97 (-0.02)	1.07 (+0.15)	1.34 (+0.16)	1.13 (-0.03)
Transportation and storage	0.64 (-0.07)	1.13 (+0.14)	0.60 (-0.09)	0.44 (-0.07)
Accommodation and food service activities	0.90 (-0.15)	0.96 (-0.05)	0.72 (+0.03)	1.42 (-0.16)
Information and communication	0.36 (-0.20)	0.50 (-0.33)	0.49 (-0.29)	0.35 (-0.31)
Financial and insurance activities	0.51 (+0.04)	0.36 (+0.01)	0.23 (-0.05)	0.28 (-0.18)
Real estate activities	0.70 (-0.20)	0.87 (+0.15)	0.81 (+0.11)	0.48 (-0.04)
Professional, scientific and technical activities	0.70 (+0.18)	0.62 (+0.01)	0.53 (-0.04)	0.97 (+0.12)
Administrative and support service activities	0.94 (+0.03)	0.87 (+0.08)	0.74 (-0.03)	0.60 (+0.12)
Public administration and defence; compulsory social security	1.87 (+0.08)	0.60 (-0.14)	0.68 (-0.01)	1.72 (+0.07)
Education	1.25 (+0.09)	1.00 (+0.10)	1.06 (-0.05)	0.86 (+0.04)
Human health and social work activities	1.18 (-0.06)	1.02 (-0.03)	1.24 (-0.01)	1.23 (+0.06)
Arts, entertainment and recreation	0.76 (-0.22)	0.82 (-0.02)	0.86 (-0.03)	1.23 (-0.10)

- Agriculture shows strong representation in the North and South, with LQs of 1.56 and 1.85 respectively, both experiencing moderate growth over the period (+0.14 and +0.17). These figures suggest that agricultural employment is particularly concentrated in these regions. In contrast, the East and West show lower LQs of 0.60 and 0.93.
- Manufacturing is a standout sector in the East, with a very high LQ of 2.52 and a notable increase of 0.24. The South (1.54) and West (1.62) also show strong concentrations and growth, while the North (1.11) remains above average with modest improvement.
- Construction is robust in all regions, particularly the South (1.43) and East (1.37), both showing growth. The North (1.33) also improved, while the West (0.68) lags behind. Wholesale and retail trade is strongest in the East (1.34), with growth also seen in the South. The North and West show slight declines, indicating regional variation in retail activity.
- Public administration is highly concentrated in the North (1.87) and West (1.72), both improving, while the South and East are below average and declining.



Location Quotient – 5UA

Location Quotient 2023 (change since 2015)

Sector	North	South	West	East	Middle
Agriculture, forestry and fishing	2.27 (+0.22)	1.85 (+0.17)	0.48 (+0.01)	0.88 (+0.10)	1.11 (+0.04)
Mining and quarrying	1.62 (-0.62)	0.81 (-0.71)	0.74 (+0.27)	0.42 (-0.15)	0.78 (+0.20)
Manufacturing	0.95 (+0.09)	1.54 (+0.16)	1.18 (+0.07)	2.82 (+0.31)	2.53 (+0.27)
Electricity, gas, steam and air conditioning supply	1.22 (+0.07)	1.70 (-0.53)	0.87 (+0.10)	1.09 (+0.15)	0.99 (+0.30)
Water supply; sewerage, waste management and remediation activities	1.06 (+0.16)	1.42 (+0.22)	0.99 (+0.11)	1.07 (+0.17)	1.13 (+0.20)
Construction	0.79 (-0.05)	1.43 (+0.25)	1.16 (+0.13)	1.44 (+0.13)	1.26 (-0.05)
Wholesale and retail trade; repair of motor vehicles and motorcycles	1.22 (+0.08)	1.07 (+0.15)	0.98 (-0.09)	1.49 (+0.36)	1.12 (no change)
Transportation and storage	0.62 (-0.11)	1.13 (+0.14)	0.54 (-0.05)	0.60 (no change)	0.56 (-0.14)
Accommodation and food service activities	1.21 (-0.04)	0.96 (-0.05)	1.05 (-0.16)	0.85 (+0.07)	0.76 (-0.10)
Information and communication	0.41 (-0.20)	0.50 (-0.33)	0.35 (-0.28)	0.56 (-0.21)	0.38 (-0.32)
Financial and insurance activities	0.41 (no change)	0.36 (+0.01)	0.44 (-0.09)	0.24 (-0.04)	0.22 (-0.04)
Real estate activities	0.65 (-0.06)	0.87 (+0.15)	0.60 (-0.14)	0.63 (-0.07)	0.87 (+0.14)
Professional, scientific and technical activities	0.68 (+0.20)	0.62 (+0.01)	0.89 (+0.11)	0.53 (-0.07)	0.58 (+0.06)
Administrative and support service activities	0.62 (-0.05)	0.87 (+0.08)	0.90 (+0.12)	0.66 (-0.31)	0.76 (+0.22)
Public administration and defence; compulsory social security	1.13 (+0.48)	0.60 (-0.14)	2.31 (-0.14)	0.35 (-0.17)	0.88 (+0.09)
Education	1.62 (+0.05)	1.00 (+0.10)	0.86 (+0.09)	1.12 (0.01)	0.98 (-0.07)
Human health and social work activities	1.14 (-0.09)	1.02 (-0.03)	1.32 (+0.07)	0.97 (-0.04)	1.27 (-0.06)
Arts, entertainment and recreation	0.91 (-0.08)	0.82 (-0.02)	1.01 (-0.24)	0.93 (no change)	0.81 (-0.04)

- Agriculture, forestry and fishing remains a stronghold in the North and South, with LQs of 2.27 and 1.85 respectively in 2023, both showing moderate growth over the period.
- Manufacturing is a standout sector in the East and Middle, with LQs of 2.82 and 2.53 in 2023, both showing strong growth. The South also saw a strong increase, while the North and West experienced more modest gains
- Wholesale and retail trade saw the most notable growth in the East (up 0.36), while other regions remained stable or declined slightly.
- Information and communication declined across all regions, with the steepest drop in the South and Middle, indicating a persistent underrepresentation of digital industries. Financial and insurance activities also saw declines or stagnation, with the East and Middle showing the lowest LQs, suggesting limited regional financial sector presence.
- Health and social work showed mixed trends, with the West seeing a small increase and other regions declining slightly.

Source: Business Register and Employment Survey, ONS, 2025



Location Quotient – 4UA B

Location Quotient 2023 (change since 2015)

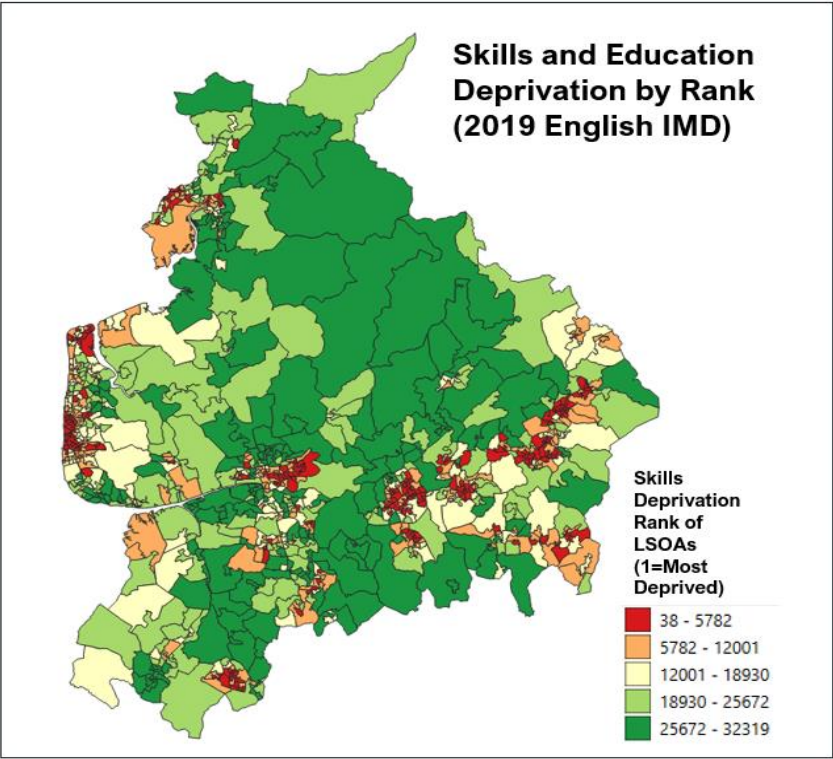
Sector	North	South	East	West
Agriculture, forestry & fishing	2.45 (+0.36)	1.90 (+0.18)	0.93 (+0.07)	0.70 (-0.01)
Mining, quarrying & utilities	1.89 (-0.41)	0.86 (-0.68)	0.67 (+0.10)	0.81 (+0.23)
Manufacturing	0.89 (+0.09)	1.60 (+0.21)	2.69 (+0.24)	1.24 (+0.07)
Construction	1.34 (+0.11)	1.71 (-0.54)	1.00 (+0.23)	0.93 (+0.11)
Wholesale and retail trade; repair of motor vehicles and motorcycles	1.10 (+0.09)	1.22 (+0.16)	1.31 (+0.12)	1.05 (-0.01)
Transport & storage (inc postal)	0.73 (-0.09)	1.12 (+0.13)	0.56 (-0.12)	0.53 (-0.05)
Accommodation & food services	1.32 (-0.18)	1.01 (-0.01)	0.76 (no change)	1.07 (-0.19)
Information & communication	0.48 (-0.02)	0.51 (-0.36)	0.47 (-0.30)	0.34 (-0.31)
Financial & insurance	0.49 (+0.05)	0.36 (+0.01)	0.23 (-0.05)	0.42 (-0.10)
Property	0.74 (-0.10)	0.87 (+0.15)	0.76 (+0.03)	0.60 (-0.13)
Professional, scientific & technical	0.70 (+0.23)	0.64 (+0.02)	0.58 (+0.01)	0.87 (+0.10)
Business administration & support services	0.77 (+0.03)	0.89 (+0.10)	0.73 (-0.03)	0.84 (+0.07)
Public administration & defence	0.46 (-0.01)	0.61 (-0.14)	0.71 (-0.02)	2.37 (+0.05)
Education	1.88 (+0.04)	1.00 (+0.09)	1.01 (-0.08)	0.89 (+0.07)
Health	1.11 (-0.15)	1.05 (-0.04)	1.20 (-0.02)	1.31 (+0.05)
Arts, entertainment, recreation & other services	0.93 (+0.05)	0.84 (no change)	0.87 (-0.02)	1.00 (-0.26)

- Agriculture shows strong representation in the North and South, with LQs of 2.45 and 1.90 respectively, both experiencing growth over the period (+0.36 and +0.18). These figures suggest that agricultural employment is particularly concentrated in these regions. In contrast, the East and West show lower LQs of 0.93 and 0.70.
- Manufacturing is a standout sector in the East, with a very high LQ of 2.69 and a notable increase of 0.24. The South at 1.60 also shows strong concentration and growth. West shows some degree of specialisation at 1.24. while the North does not with an LQ below 1.
- Construction is another area of strength in South despite a significant decline in LQ over recent years and in the North.
- Wholesale and retail trade an area of collective strength particularly so in the East.
- Health although not a strong specialism some degree of specialisms in all UAs.
- Public administration is highly concentrated in the West at over twice as specialised as nationally.
- Education specialism centred in North with the presence of the University of Lancaster, Lancaster campus of the University of Cumbria and 2 FE colleges.

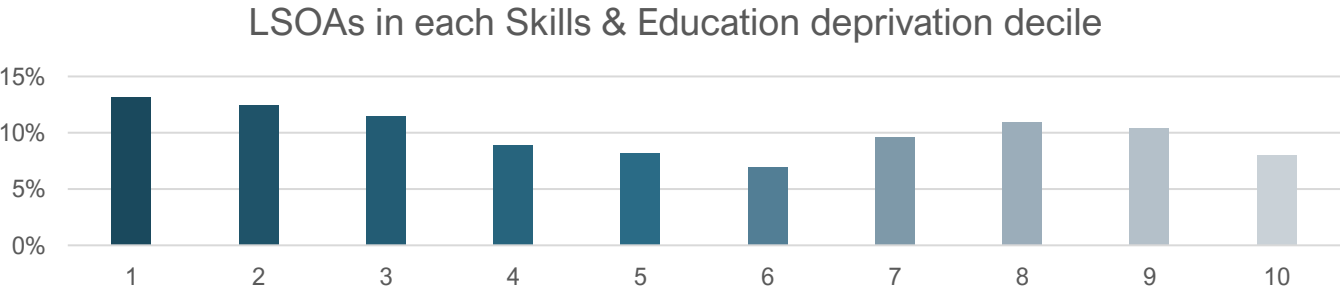
Skills and workforce development

Skills Deprivation

The 2019 English Indices of Multiple Deprivation (IMD) includes the Education, Skills and Training domain as one of its seven weighted components. This domain measures the lack of attainment and skills in the local population, split into two subdomains: one focused on children and young people, and the other on adult skills. It contributes 13.5% to the overall IMD score, reflecting its importance in assessing deprivation across England. Areas are ranked and grouped into deciles, with decile 1 representing the most deprived 10% of areas and decile 10 the least deprived.

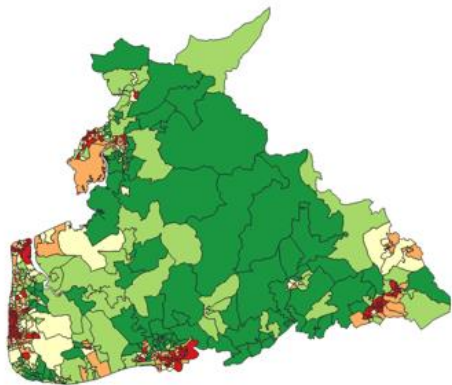


- In Lancashire, 13% of neighbourhoods fall within decile 1 for the Education, Skills and Training domain of the 2019 English Indices of Multiple Deprivation (IMD), meaning they are among the most deprived 10% nationally in terms of educational attainment and skills. This reflects widespread challenges in both young people’s educational outcomes and adult skill levels, particularly in areas like Blackpool, Burnley, and Blackburn with Darwen, which have high concentrations of deprivation. In contrast, only 8% of Lancashire’s areas are in decile 10, the least deprived nationally, indicating that few communities in the county enjoy high levels of educational achievement and skills relative to the rest of England. This imbalance highlights the significant spatial inequality across the county.

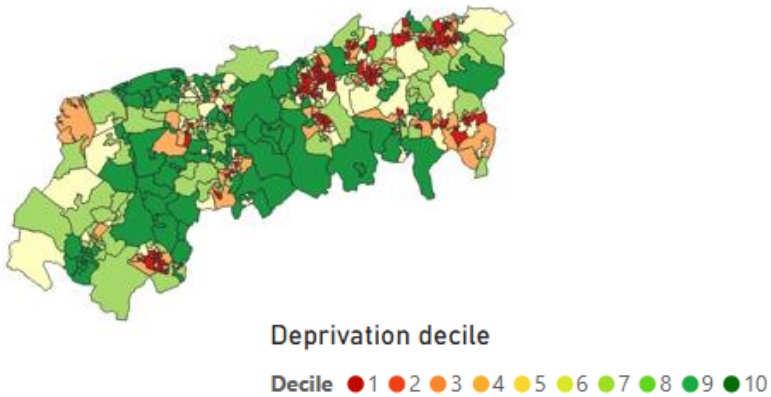


Skills Deprivation – 2UA

North – 2 UA

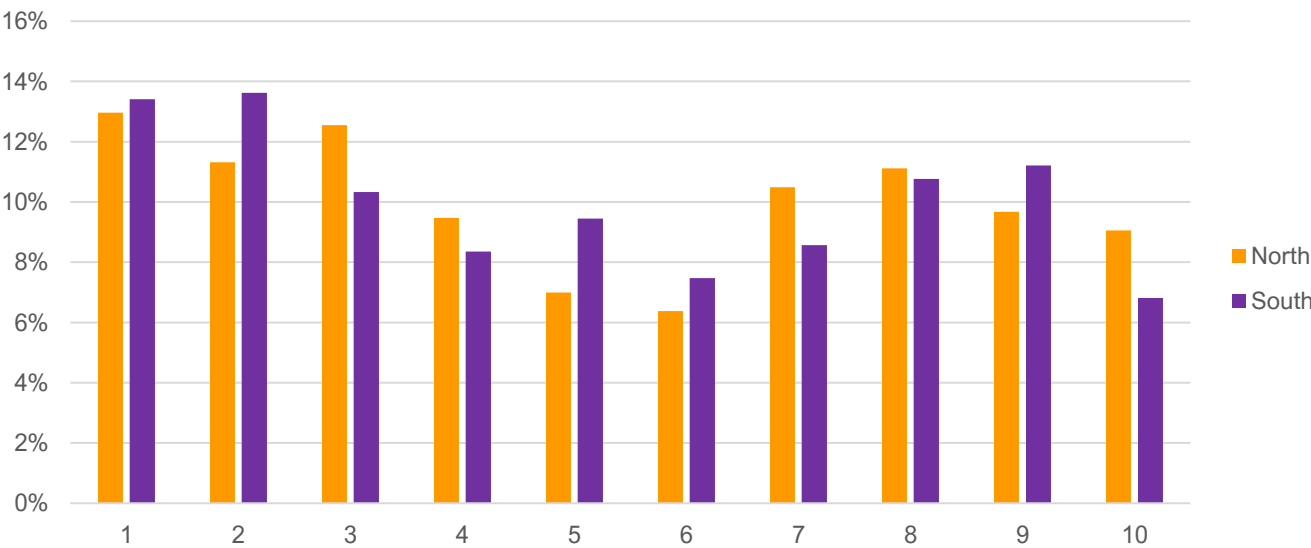


South – 2 UA



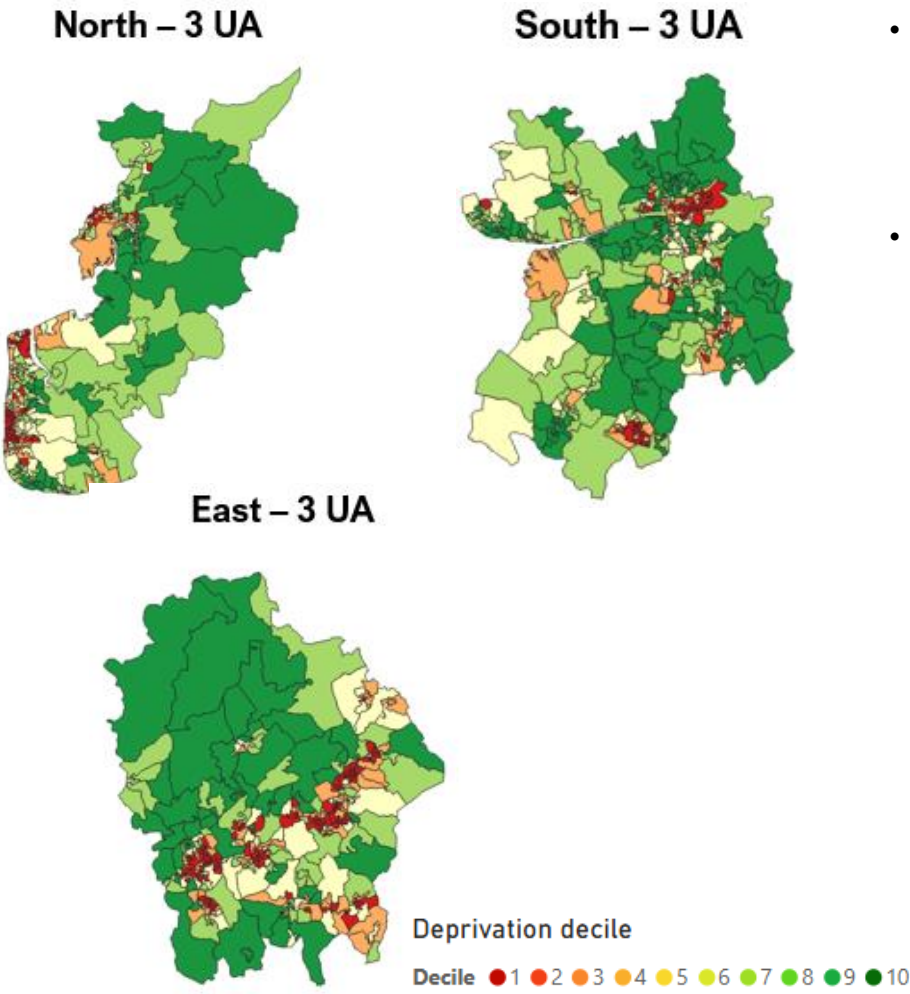
- Both North and South unitary options have 13% of their areas in the most deprived decile (1) for education and skills, indicating a common baseline of acute need.
- However, the South shows higher proportions in decile 2 (14%) and lower in decile 10 (7%), pointing to a greater concentration of low attainment and skills deprivation.
- The North has a more even spread across the deciles, with higher representation in decile 3 (13%) and slightly more areas in decile 10 (9%) than South.

2UA LSOAs in Skills and Education national deprivation decile (IMD 2019)



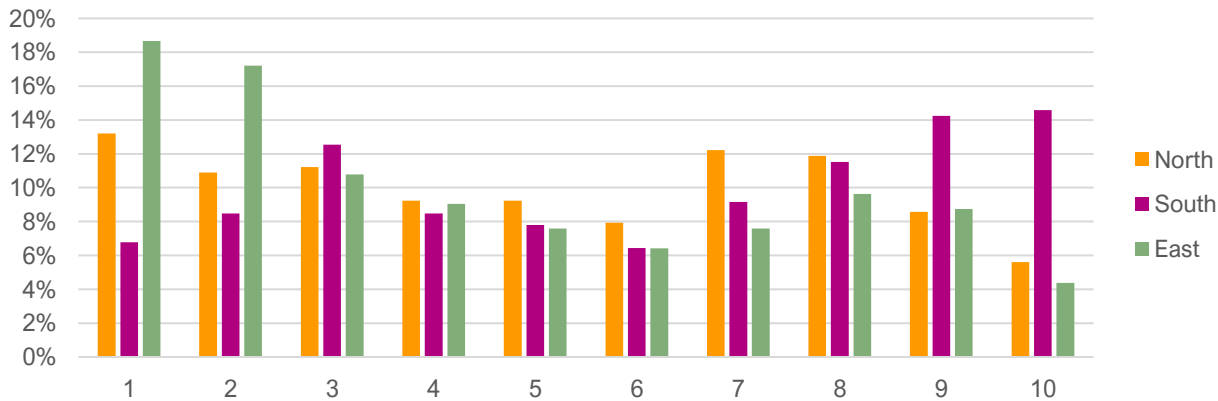
Source: MHCLG English indices of deprivation (2019)

Skills Deprivation – 3UA



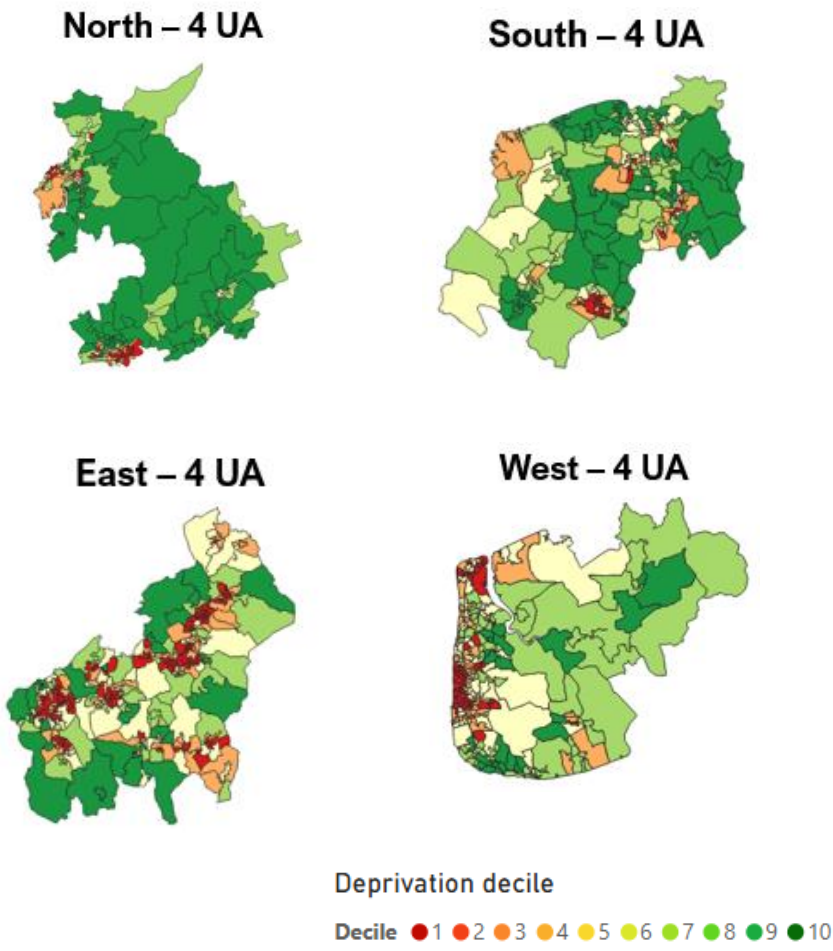
- The East unitary exhibits the highest concentration of high deprivation in Skills and Education, with 47% of its area falling in the most deprived deciles (1-3). Only 23% of its areas are in the least deprived deciles (8-10), indicating limited zones of high educational attainment. This suggests the East faces the most acute and widespread challenges in education and skills.
- The North unitary has a more balanced profile of Skills and Education deprivation with 35% in high deprivation and 27% in low deprivation. However, the South presents a contrasting picture with 28% of its area within the highest deprivation but 41% in the lowest deprivation; this implies that the South has a stronger presence of areas with better educational outcomes and fewer zones of acute need.

3UA LSOAs in Skills and Education national deprivation decile (IMD 2019)

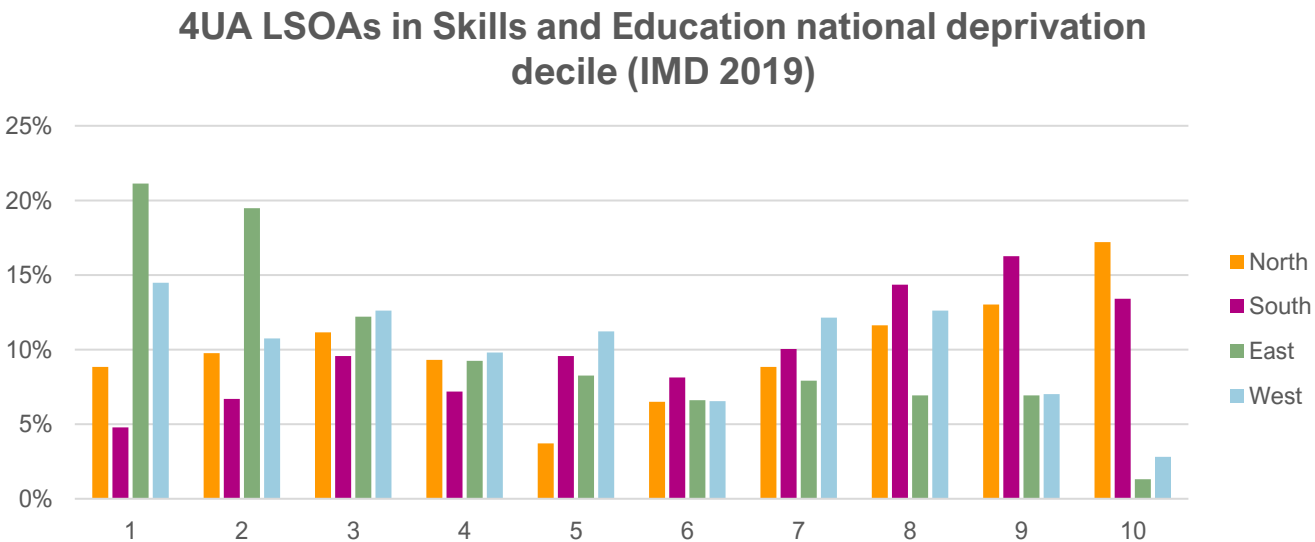


Source: MHCLG English indices of deprivation (2019)

Skills Deprivation – 4UA

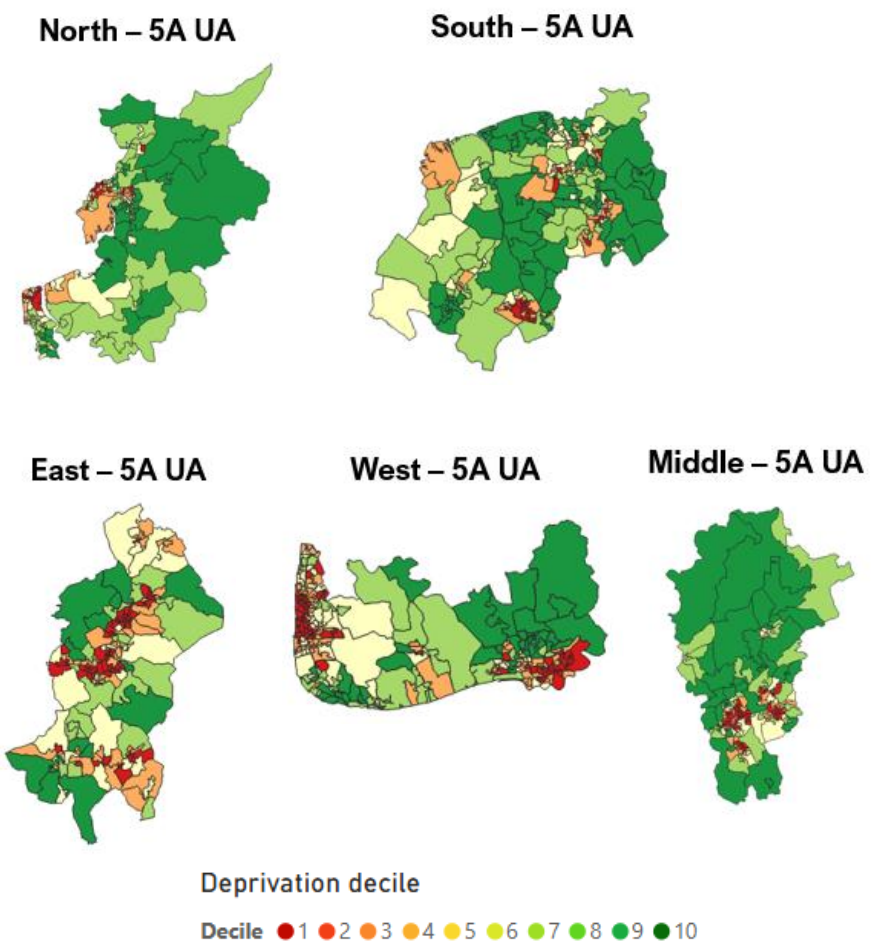


- The East unitary shows the most acute deprivation, with 52% of its areas in the most deprived deciles (1-3) for Skills and Education. Only 15% of its area falls in the least deprived (8-10), indicating limited zones of high attainment. This highlights the East as the most challenged geography. However, the West also faces significant deprivation, with 38% of areas in high deprivation and only 23% in low deprivation.
- The North unitary has a more balanced profile of high and low deprivation areas. The South has the lowest proportion of high deprivation areas (22%), compared to having 42% of its total area experience low Skills and Education deprivation.

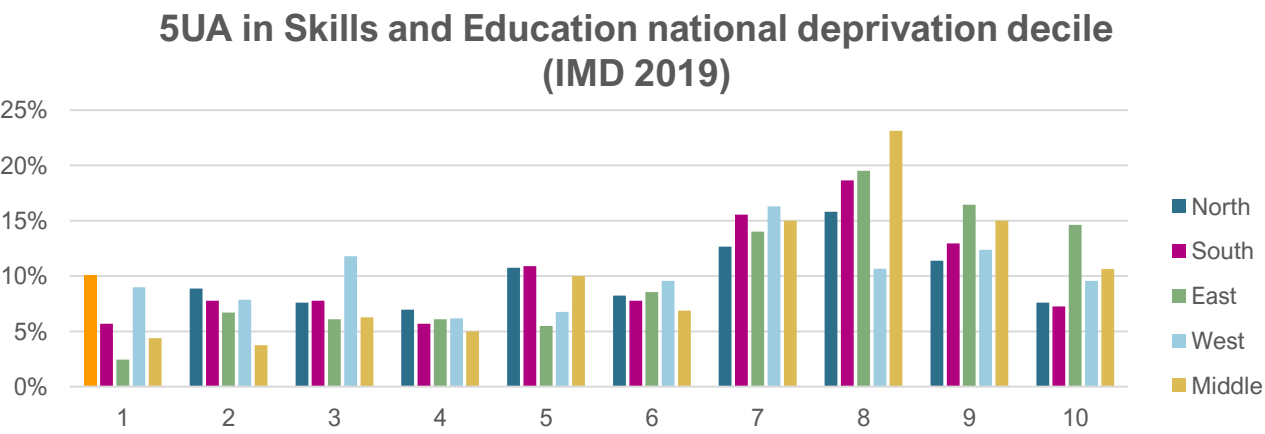


Source: MHCLG English indices of deprivation (2019)

Skills Deprivation – 5UA

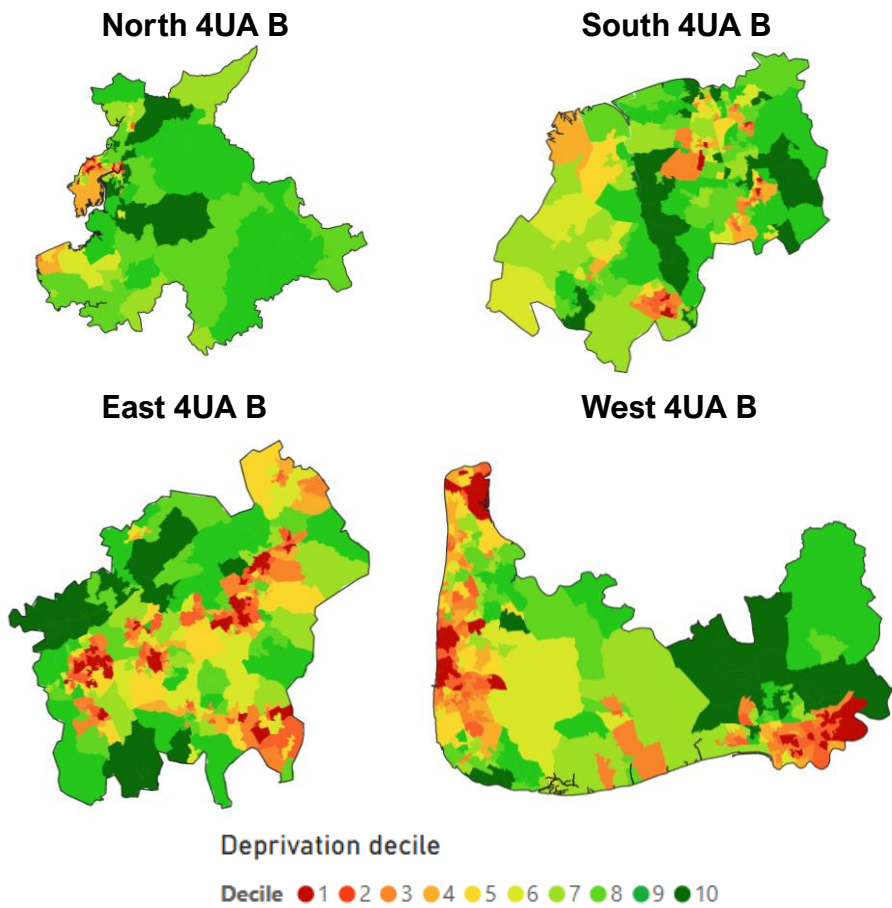


- The East unitary shows 15% of its total area experiencing the highest levels of skills deprivation (1-3 decile); 51% falls within the least deprived for Skills and Education (deciles 8-10).
- The Middle unitary has the lowest proportion of its area experiencing severe skills deprivation at 14%; however, it has 49% of falling within the top deciles indicating that low skills deprivation.
- The North and South show broadly equivalent spread of Skills and Education deprivation with 27% and 21% of the total area in high deprivation respectively.
- The West presents a more evenly distributed profile, with 29% of its areas in high deprivation (deciles 1–3) and 33% in low deprivation (deciles 8–10). This balance indicates a mixed geography, where deprivation and attainment coexist across the unitary.

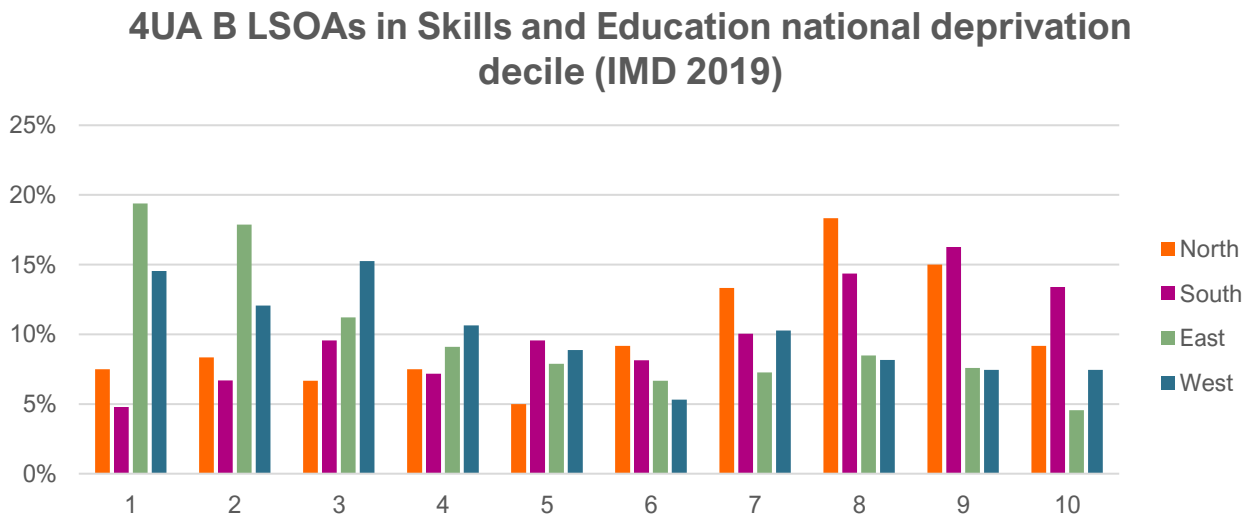


Source: MHCLG English indices of deprivation (2019)

Skills Deprivation – 4UA B

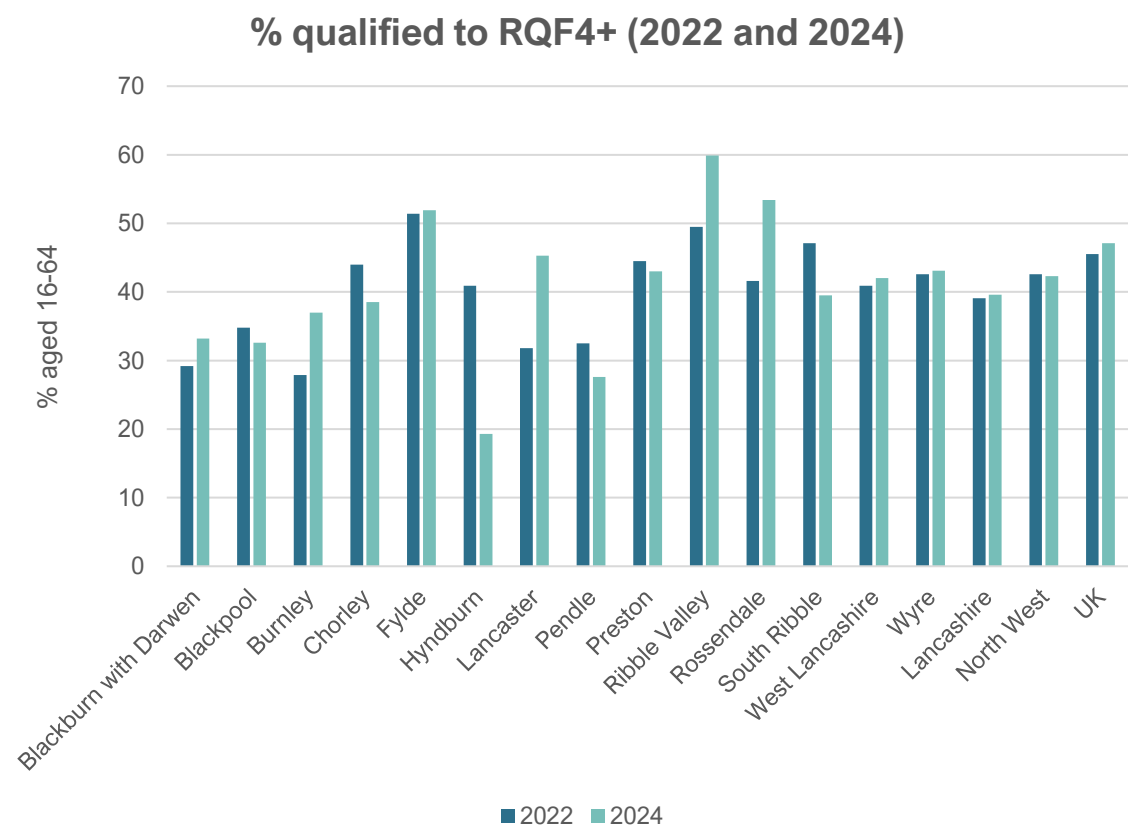


- East shows the highest levels of deprivation in relation to education, skills and training – 48% of neighbourhoods in the top 30% deprived nationally and 21% in the least 30% deprived nationally.
- West also shows high levels of deprivation in relation to education, skills and training – 42% of neighbourhoods in the top 30% most deprived nationally and 23% in the least 30% deprived nationally.
- South and North show lower levels of deprivation – 21%-23% of neighbourhoods in the top 30% most deprived nationally and 43-44% in the least 30% deprived nationally.



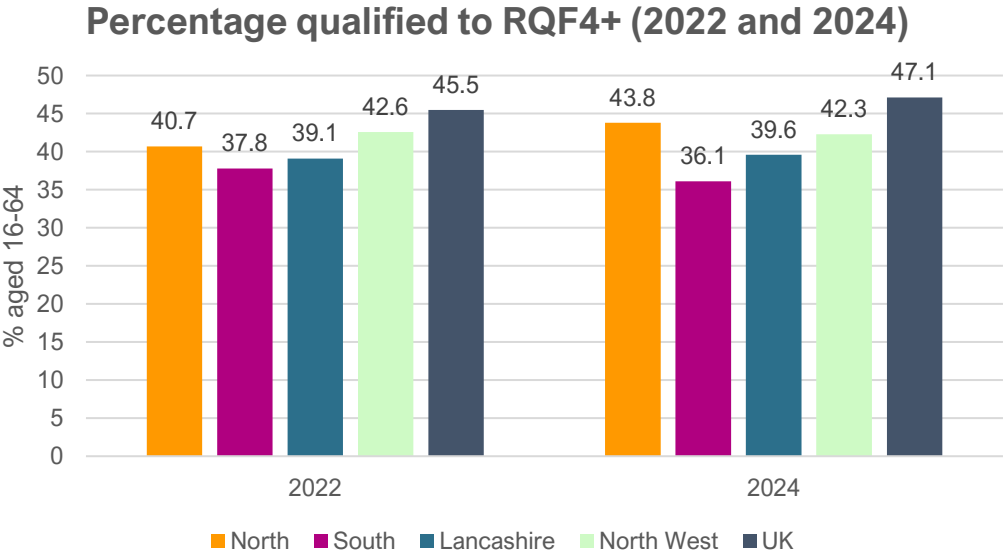
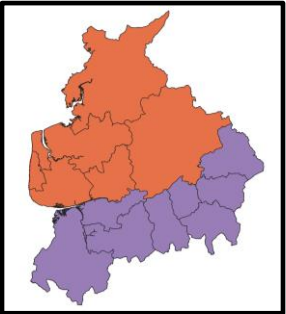
Source: MHCLG English indices of deprivation (2019)

Qualifications attainment – degree level and above



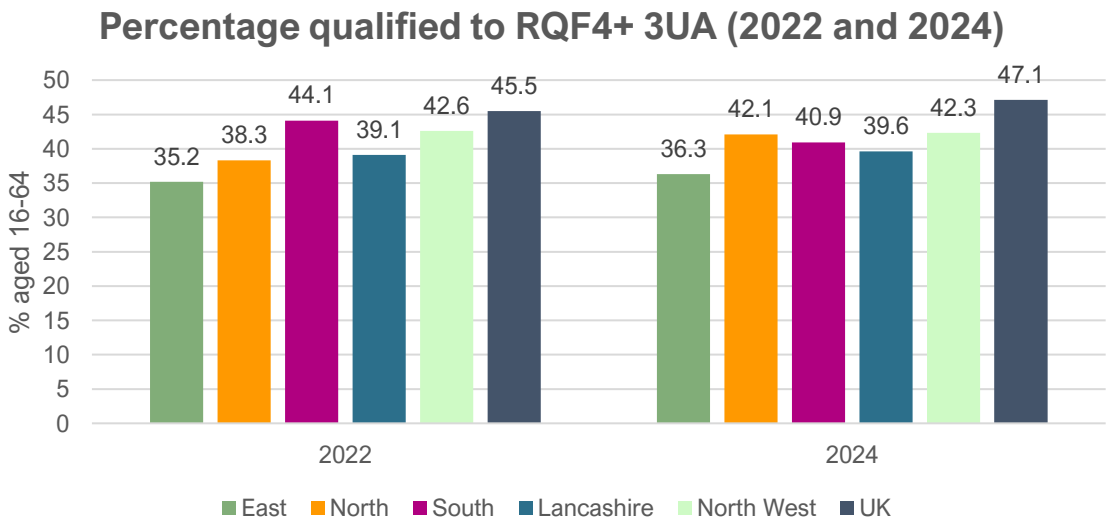
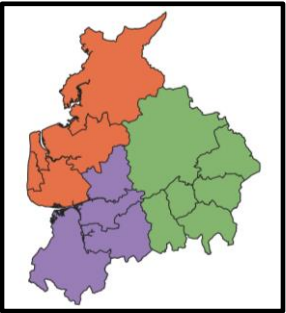
- The following analysis focuses on the proportion of the working age population qualified to degree level and above (RQF4+).
- Between 2022 and 2024, Lancashire consistently lagged behind both the North West and UK in the proportion of its population holding RQF4+ qualifications; in 2024 Lancashire lagged the regional average by 2.7pp and 7.5pp nationally.
- Districts with RQF4+ qualification attainment above the national average (2022–2024) include Fylde, Ribble Valley, and Rossendale.
- Districts below the regional average include Blackburn with Darwen, Blackpool, Burnley, Chorley, Pendle, South Ribble, and Hyndburn which is the lowest at fewer than one in five qualified to degree level and above.

RQF4+ attainment – 2UA



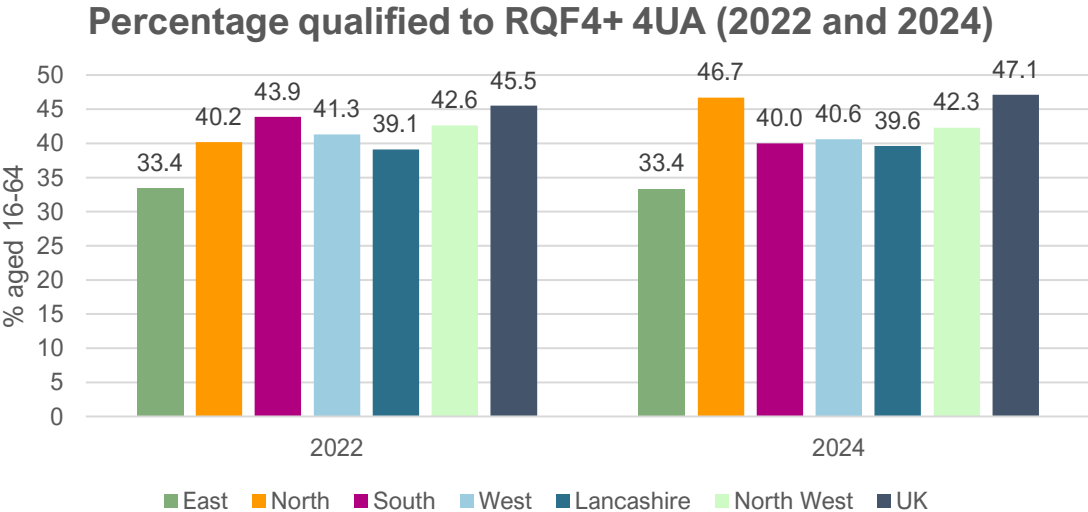
- The North has consistently outperformed the South and has seen continual improvement with an increase in the proportion of the population qualified to degree level and above from 41% to 44%, moving to a point which is above the regional average although remains below 47% nationally.
- South continues to see a lower proportion qualified to degree level and above and this has fallen from 38% to 36% – 6 percentage points below the regional average in 2024. The gap in attainment between North and South has widened from 3 percentage points to 7.5 percentage points.

RQF4+ attainment – 3UA



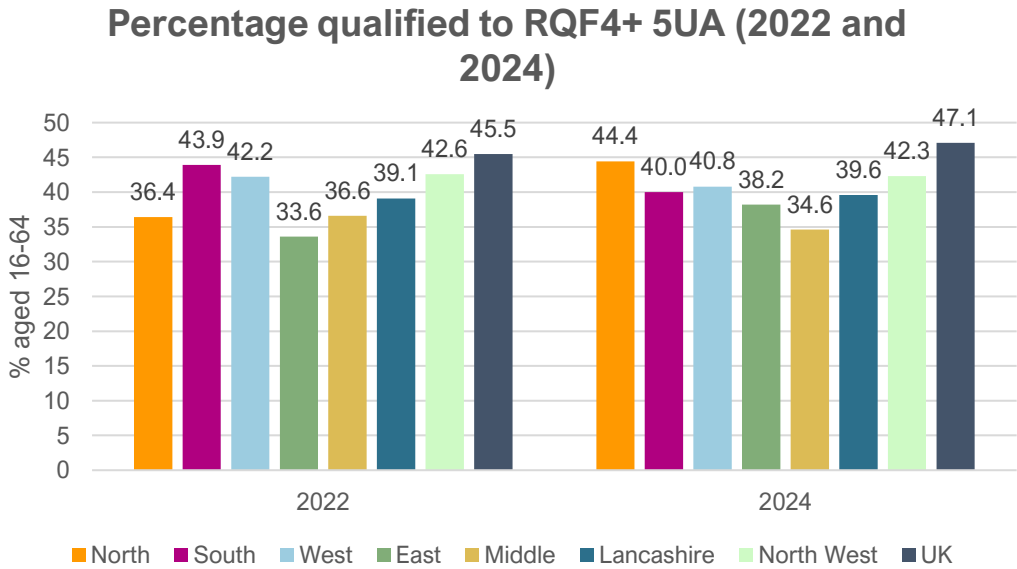
- North has overtaken the South in RQF4+, rising to 42% of the working age population in the North, the only UA in line with the regional average.
- South attainment has fallen to a point of being below the regional average at 41%.
- East has also seen a rise in the proportion of people qualified to degree level or above to 36% but this remains 6 percentage points below the regional average.
- The gap of 6 percentage points between highest and lowest attainment in the 3UA option is lowest across options.

RQF4+ attainment – 4UA



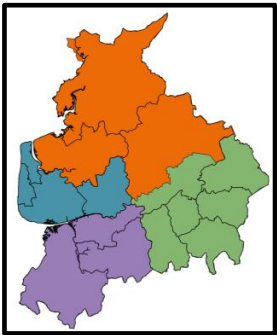
- North has become the UA with the highest proportion qualified to RQF4+ at around 47% of the working age population, above the regional average and in line with the national average. This is the only UA with a higher proportion than the national average.
- South and West have seen a fall, particularly in the South with both just below the regional average.
- East has seen no change with a third of the working age population qualified to RQF4+ by far the lowest of the UAs and almost 10 percentage points below the regional average.
- The gap between North with the highest and East the lowest attainment is over 13 percentage points, the highest across UA options.

RQF4+ attainment – 5UA

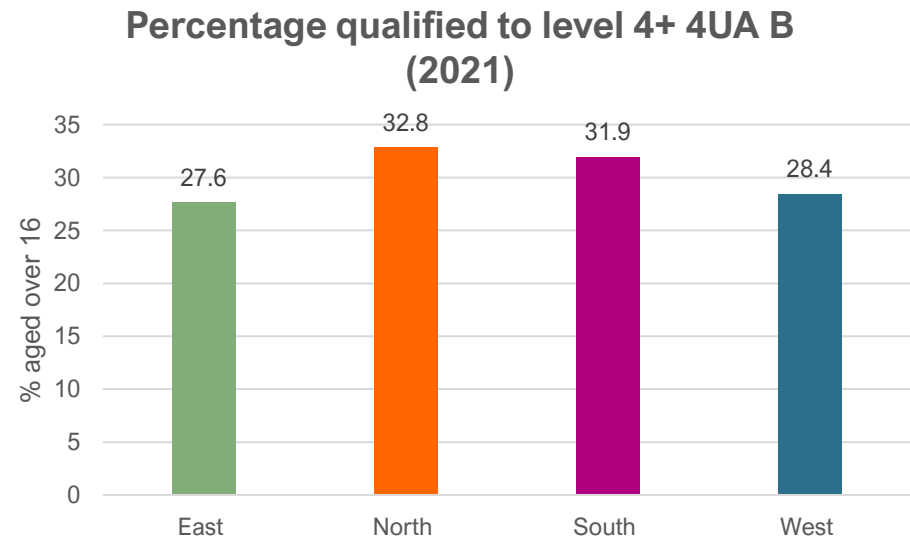


- North has shown a strong rise in the proportion of people qualified to degree level up to 44%, above regional average of 42% but below the national average of 47%. North Lancashire is the only UA with higher attainment than the regional average.
- South and West have both seen a fall in attainment levels to 40-41% so just below the regional average.
- Attainment has risen strongly in East but remains 4 percentage points below the regional average
- The proportion qualified to RQF4+ has fallen in Middle UA and is almost 8 percentage points below the regional average.

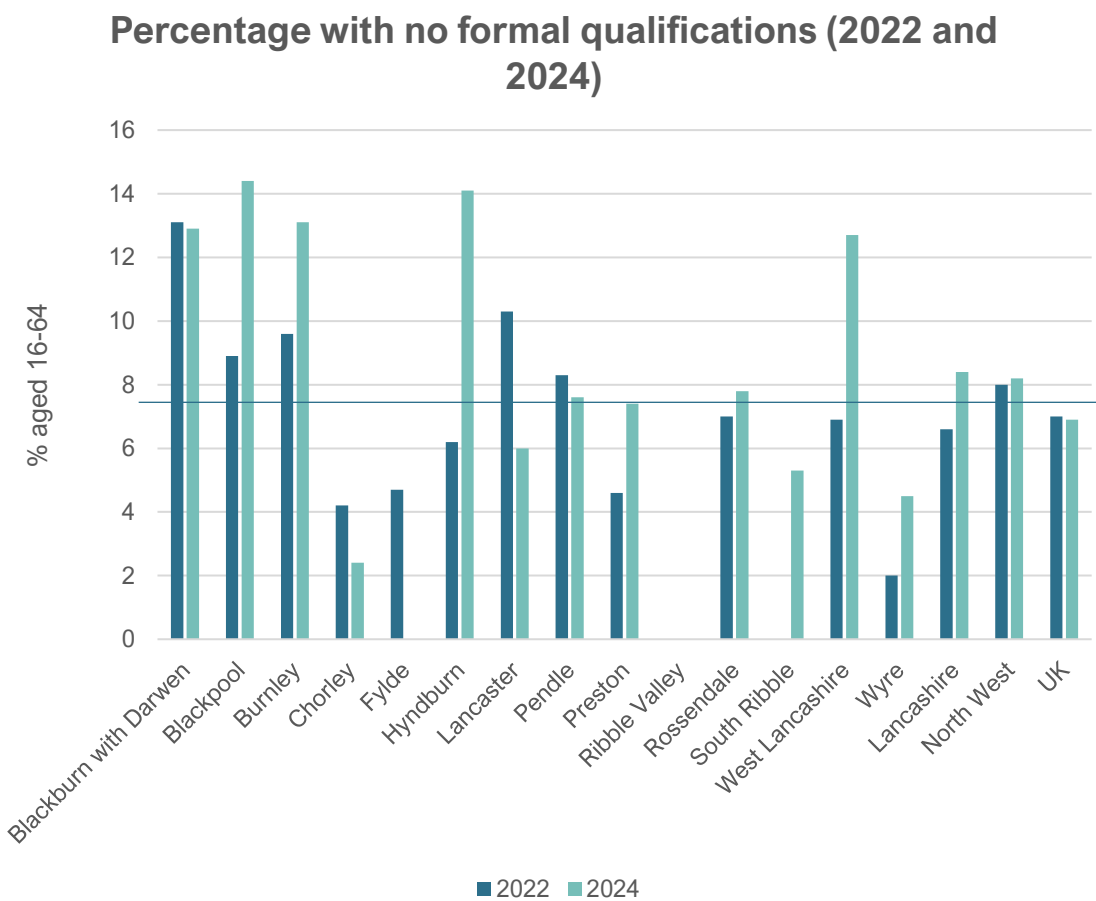
Level 4 qualifications attainment – 4UA B



- *ONS Annual Population Survey (APS) unavailable below LA level so we have used the ONS Census to source qualifications attainment. Figures will vary to those from the previous slides as census qualifications data refers to attainment by all residents aged over 16 whereas the data for other UA options considers qualifications from the ONS APS held by the working age (16-64) population.*
- North has the highest proportion qualified to degree level and above (level 4+) followed by South with both just under a third of residents.
- West and East have fewer people qualified to degree level and more people with no formal qualifications



Qualifications attainment – no formal qualifications

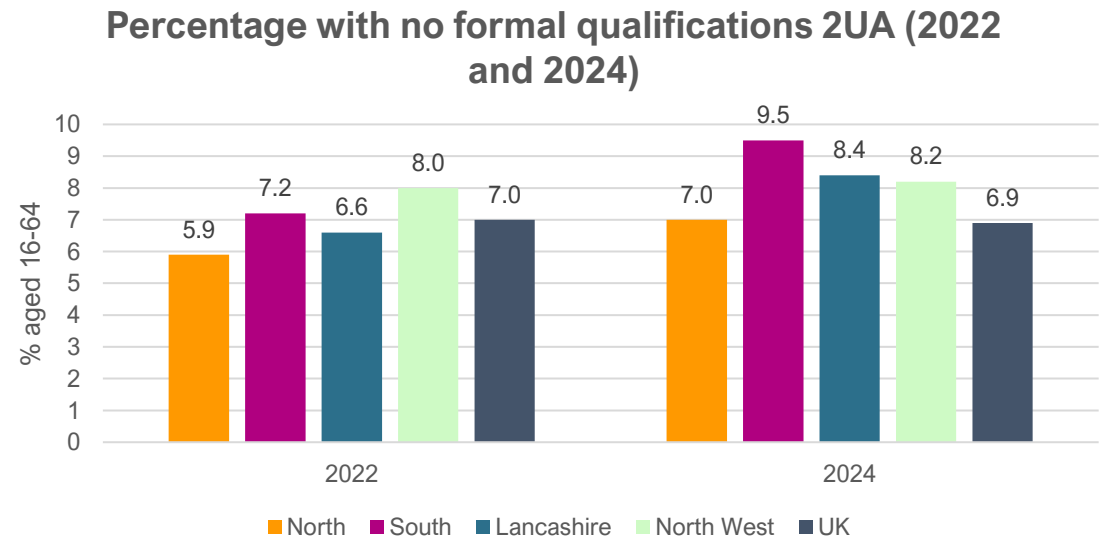
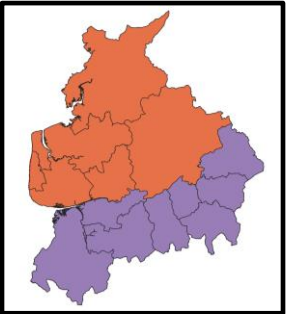


- The following analysis focuses on the proportion of the working age population with no formal qualifications (RQF).
- There has been a slight rise in the proportion of the working age population in Lancashire from 6.6% to 8.4% between 2022 and 2024. This is in line with 8.2% regional average but above 6.9% nationally.
- Eight of the districts have a higher proportion of residents with no formal qualifications although Preston, Pendle, and Rossendale levels are just below the regional average, however levels are much higher in Blackpool, Hyndburn, Burnley, and West Lancashire at almost double the proportion to nationally.
- There are four districts with a lower proportion of the population with no formal qualifications than the national average (Chorley, Wyre, West Lancashire, and Lancaster)

Notes: estimates are unavailable for Ribble Valley; Fylde in 2024; and South Ribble in 2022.

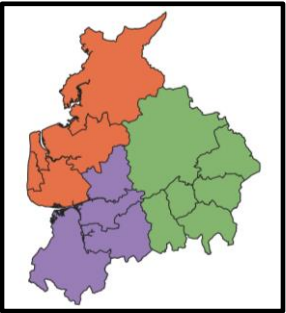
Source: Annual Population Survey, ONS, 2025

No formal qualifications – 2UA

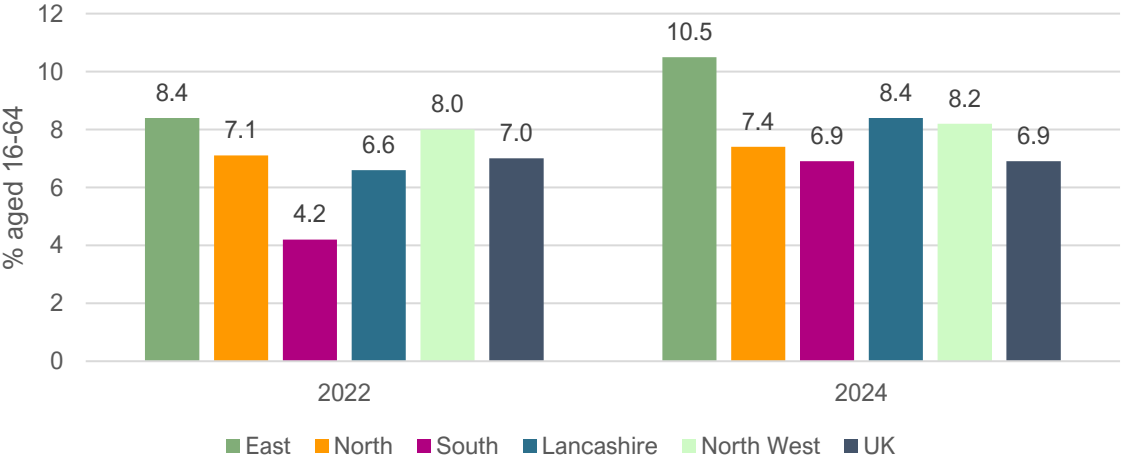


- There has been a rise in both the North and South in the proportion with no formal qualifications
- Levels have risen more strongly in the South, increasing the gap to 2.5 percentage points in the proportion with no formal qualifications. Although this is the lowest gap across LGR options.
- Despite a rise in the North, levels are in line with the national average and below the regional average.
- Levels in the South are well above national levels and above the regional average.

No formal qualifications – 3UA

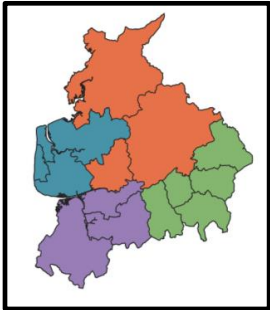


Percentage with no formal qualifications (2022 and 2024)

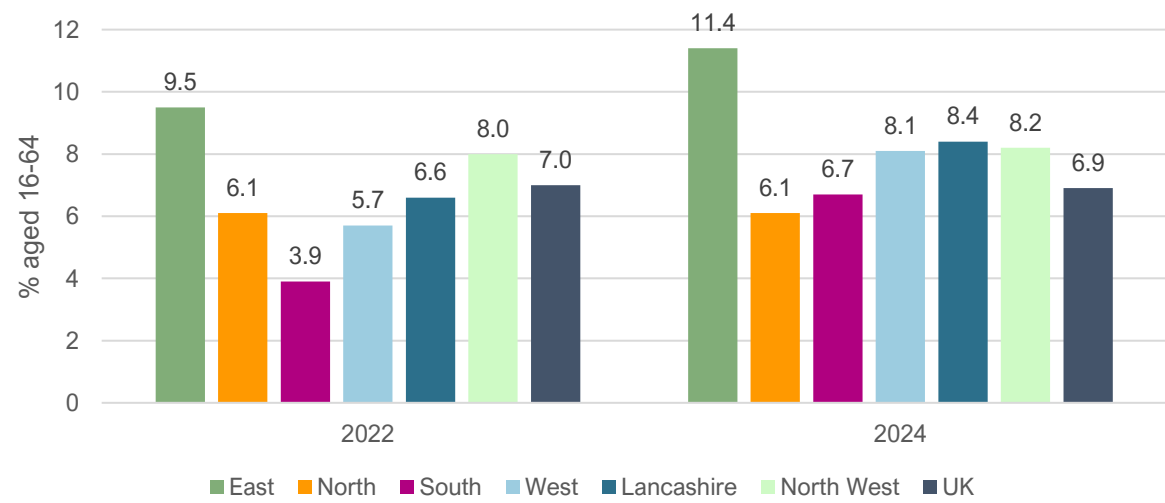


- East continues to have the highest proportion with no formal qualifications, rising to more than 1 in 10 of the working age population – well above regional and national averages.
- North has seen little change and is just above the national average but below the regional average.
- South has seen a significant rise but is in line with the national average and below the regional averages.
- There is a significant gap in the UA with the lowest proportion with no formal qualifications (South) and highest (East) of 3.6 percentage points, although this is not as high as options 4 and 5.

No formal qualifications – 4UA



Percentage with no formal qualifications 4UA (2022 and 2024)

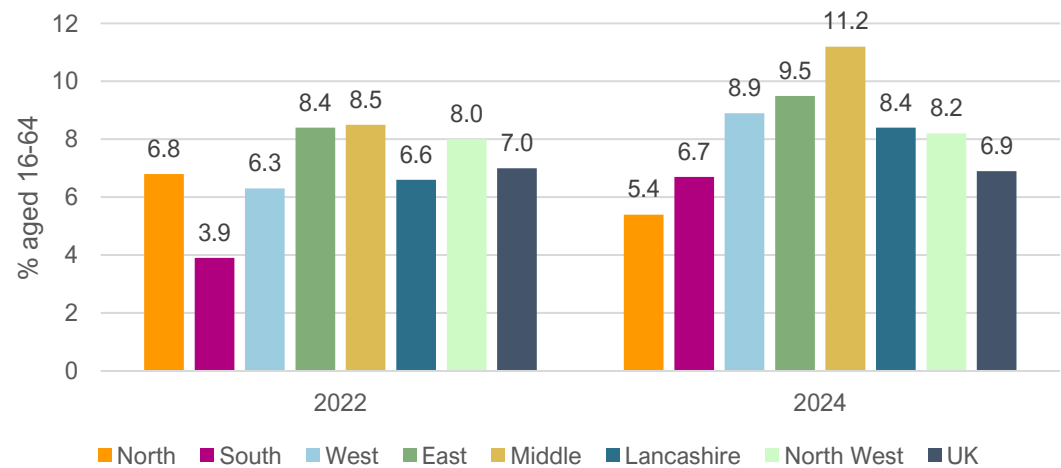


- East is the only district with a higher proportion of the working age population with no formal qualifications than compared to regionally, rising to over 11% in 2024, almost double the proportion in North and South Lancashire.
- Levels have also risen in the West but are in line with the regional average.
- South has seen a strong rise but levels are in line with the national average and below the regional average.
- North has the lowest proportion of the working age population with no formal qualifications, below regional and national averages.
- The gap between the UA with the lowest proportion (North) and highest proportion (East) is 5.3 percentage points, among the highest of LGR options.

No formal qualifications – 5UA

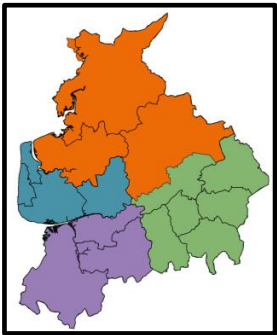


Percentage with no formal qualifications 5UA
(2022 and 2024)

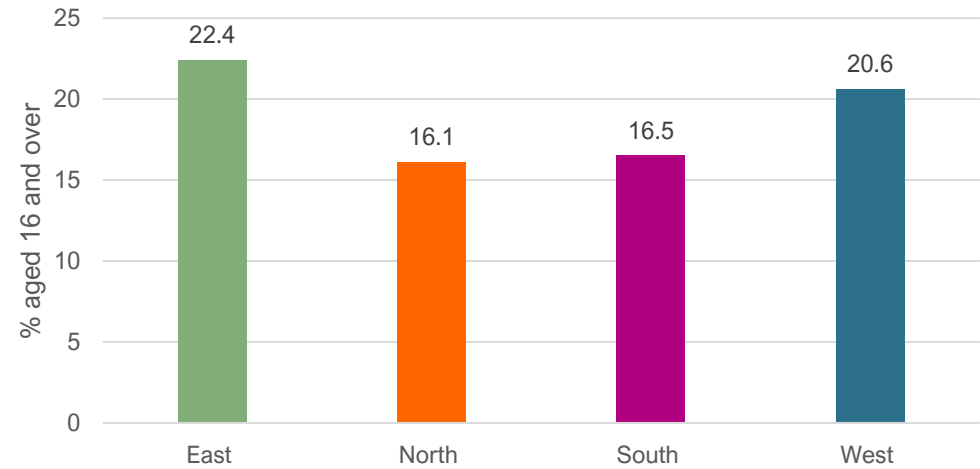


- Middle and East have higher proportion of the working age population with no formal qualifications than compared to regionally, rising to over 11% in Middle and 9.5% in East in 2024 – Middle has over double the proportion than the North.
- Levels have also risen in the West and are slightly above the regional average.
- South has seen a strong rise but levels are in line with the national average and below the regional average.
- North has the lowest proportion of the working age population with no formal qualifications, below regional and national averages.
- The gap between the UA with the lowest proportion (North) and highest proportion (Middle) is 5.8 percentage points, the highest of LGR options.

No formal qualifications – 4UA B



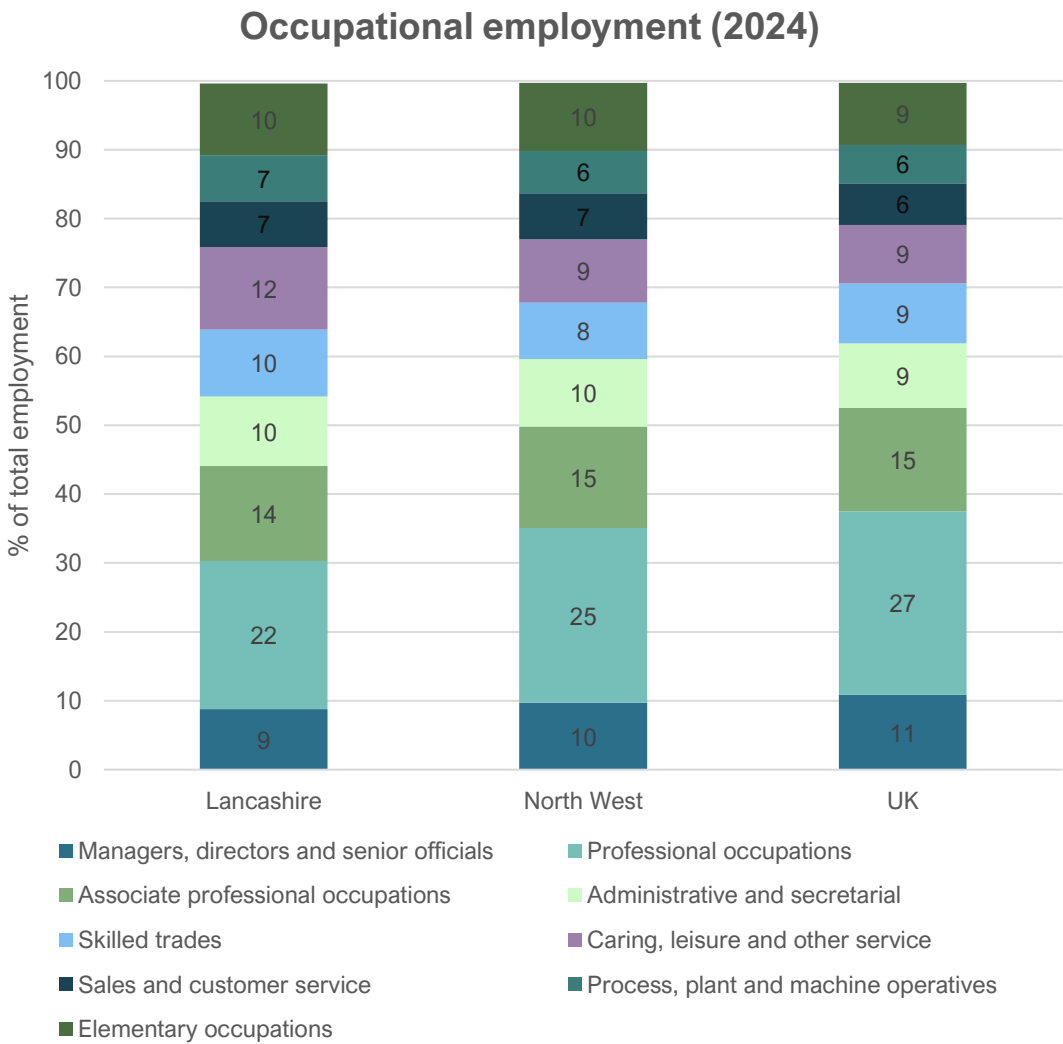
Percentage with no formal qualifications 4UA B (2021)



- ONS Annual Population Survey (APS) unavailable below LA level so we have used the ONS Census to source qualifications attainment. Figures will vary to those from the previous slides as census qualifications data refers to attainment by all residents aged over 16 whereas the data for other UA options considers qualifications from the ONS APS held by the working age (16-64) population.
- West and East have fewer people qualified to degree level and more people with no formal qualifications.
- North has the lowest proportion of residents with no formal qualifications highest proportion qualified to degree level and above (level 4+).

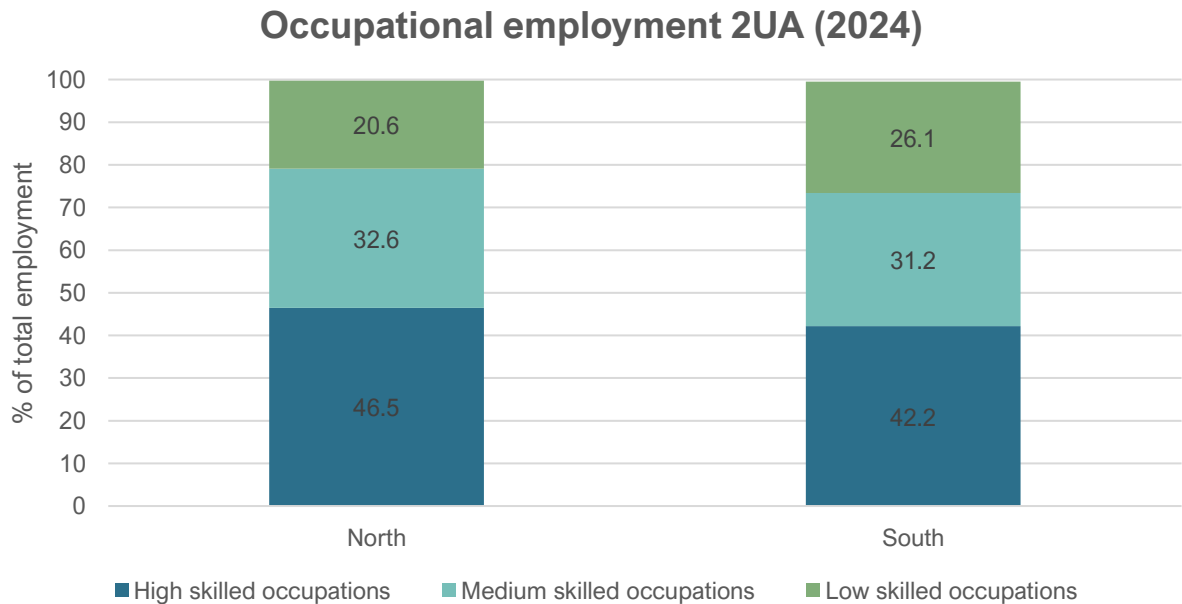
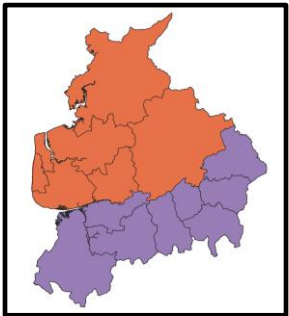
Occupational employment

- *The chart to the right shows employment by occupation in Lancashire. High skilled occupations are formed of managers, directors and senior official, professional and associate professional occupations. Medium skills occupations are formed of administrative and secretarial, skilled trades and caring, leisure and other service occupations. Low skilled occupations are formed of sales and customer service, process, plant and machine operatives and elementary occupations.*
- Lancashire has a lower proportion employed in high skilled occupations at 44% compared to 50% regionally and 52.5% nationally – less employed as managers or in professional occupations.
- Lancashire has more people employed in medium occupations at 32% compared to 27% regionally and nationally – more in caring, leisure and other service occupations.
- There are also more people in Lancashire employed in lower skilled occupations at 24% compared to 23% regionally and 21% nationally.
- There is a higher proportion of employment in high skilled occupations in Fylde, Rossendale, South Ribble, and Chorley above 52.5% nationally. A lower proportion in Hyndburn, Pendle, Blackburn, and Blackpool at around or below a third of total employment.



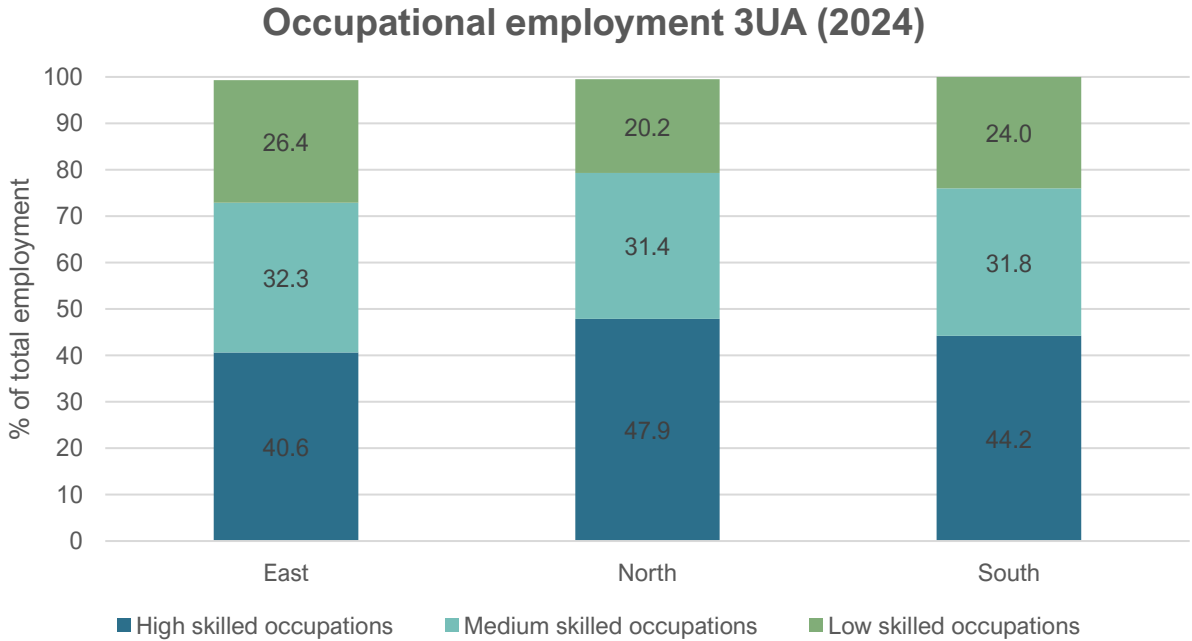
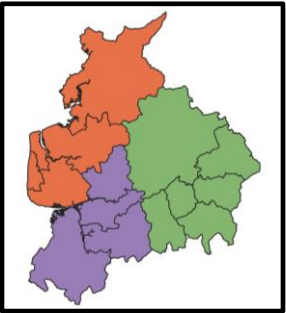
Source: Annual Population Survey, ONS, 2025

Occupational employment – 2UA



- North has a higher proportion employment in higher skilled occupations although both are below the regional average of 50%. North has a higher proportion employed in professional occupations and managers
- The proportion of employment in medium skilled occupations is similar in the 2UAs at around a third of total employment – slightly above regional and national levels.
- South has a higher proportion employed in lower skilled occupations particularly within elementary occupations at around 12% of total employment. The proportion employed in lower skilled occupations is above nationally and regionally in the South, North in line with nationally.

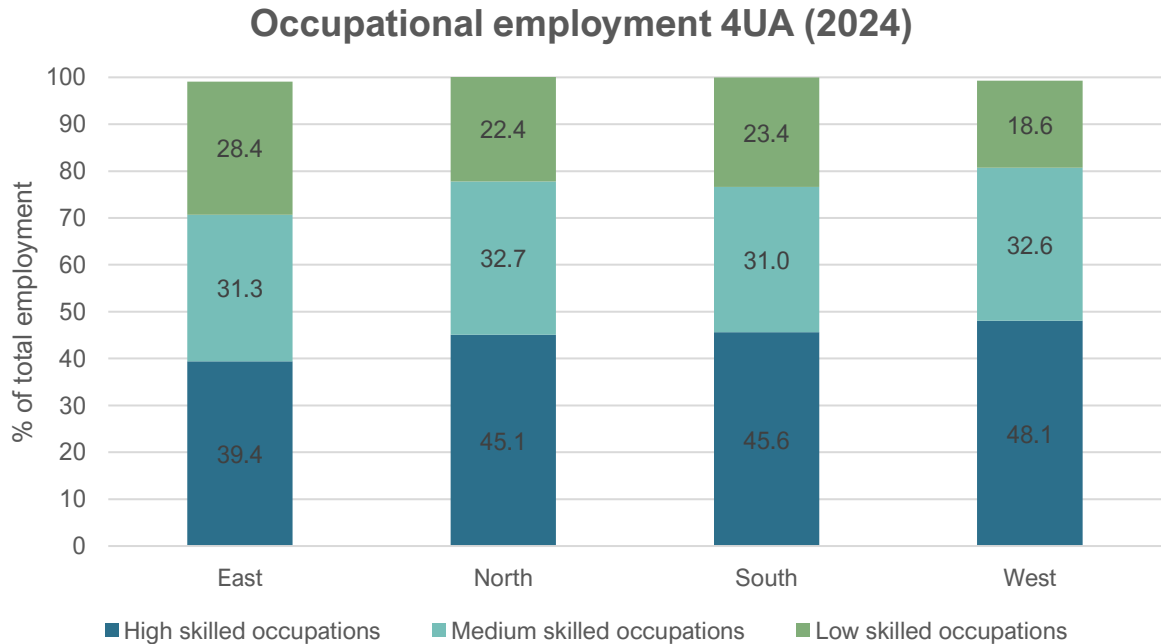
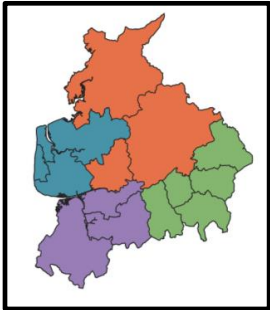
Occupational employment – 3UA



- North has highest proportion employed in high skilled occupations – higher proportions employed as managers and in professional occupation, although just below 50% regional average.
- Proportion employed in medium skilled occupations at a similar levels across the UAs at around a third of total employment – slightly above regional and national levels.
- East and South have higher proportions employed in lower skilled occupations, particularly East at over a quarter of total employment – high proportions in elementary occupations and sales and customer service. North a lower proportion employed in low skilled occupations.

Source: Annual Population Survey, ONS, 2025

Occupational employment – 4UA



- Wide variation across the UAs. West has the highest proportion of employment in high skilled occupations with more people employed as managers compared to other UAs; North and West around a quarter of total employment employed in professional occupations.
- Similar levels of employment in medium skilled occupations at around a third of total employment – slightly above regional and national levels.
- East has the lowest level of employment in high skilled occupations and the highest in low skilled occupations – the only UA with above a quarter of total employment in lower skilled occupations, with high levels in elementary occupations and caring leisure and other service (a fifth of total employment combined). West has lowest levels in low skilled occupations, slightly below national levels.

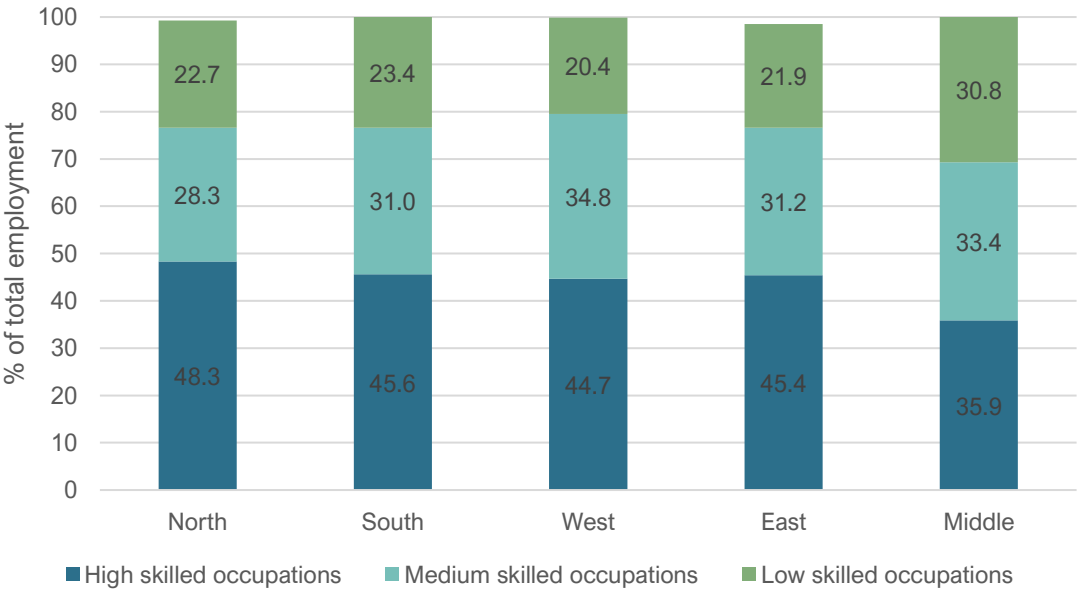
Source: Annual Population Survey, ONS, 2025

Occupational employment – 5UA



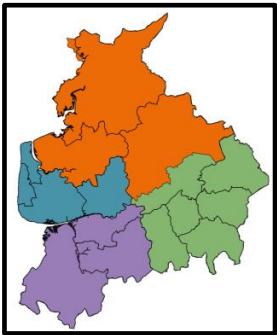
- Wide variation across the UAs. North has the highest proportion of employment in high skilled occupations with more people employed as managers compared to other UAs; North and West around a quarter of total employment employed in professional occupations.
- Similar levels of employment in medium skilled occupations at around a third of total employment in West, Middle, East, and South. Levels lowest in South at around levels regionally and nationally.
- Middle has the lowest level of employment in high skilled occupations and the highest in low skilled occupations – at more than 3 in 10 employed in lower skilled occupations. with high levels in elementary occupations and caring leisure and other service (22% of total employment combined). West has lowest levels in low skilled occupations, slightly below national levels. The other UAs in line with regional average.

Occupational employment 5UA (2024)

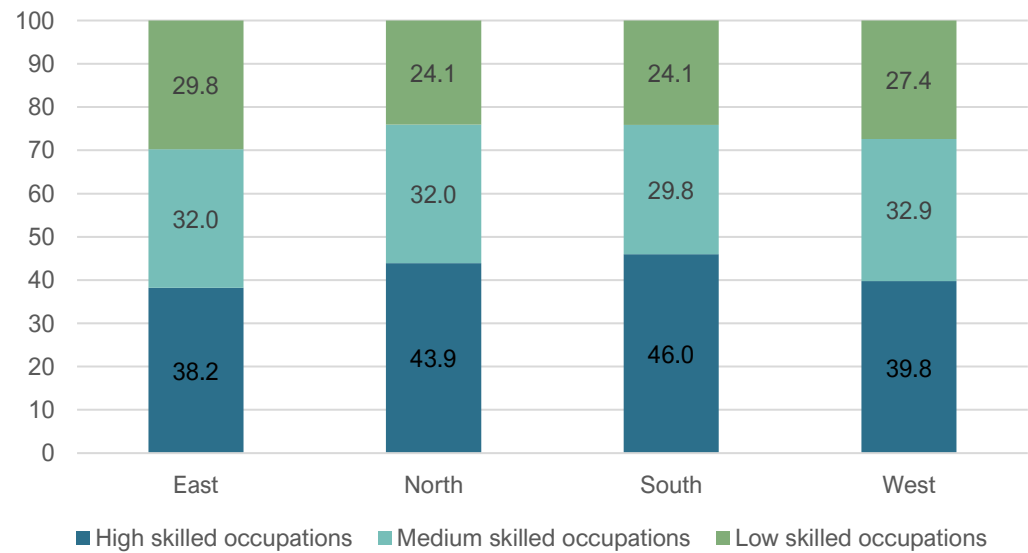


Source: Annual Population Survey, ONS, 2025

Occupational employment – 4UA B

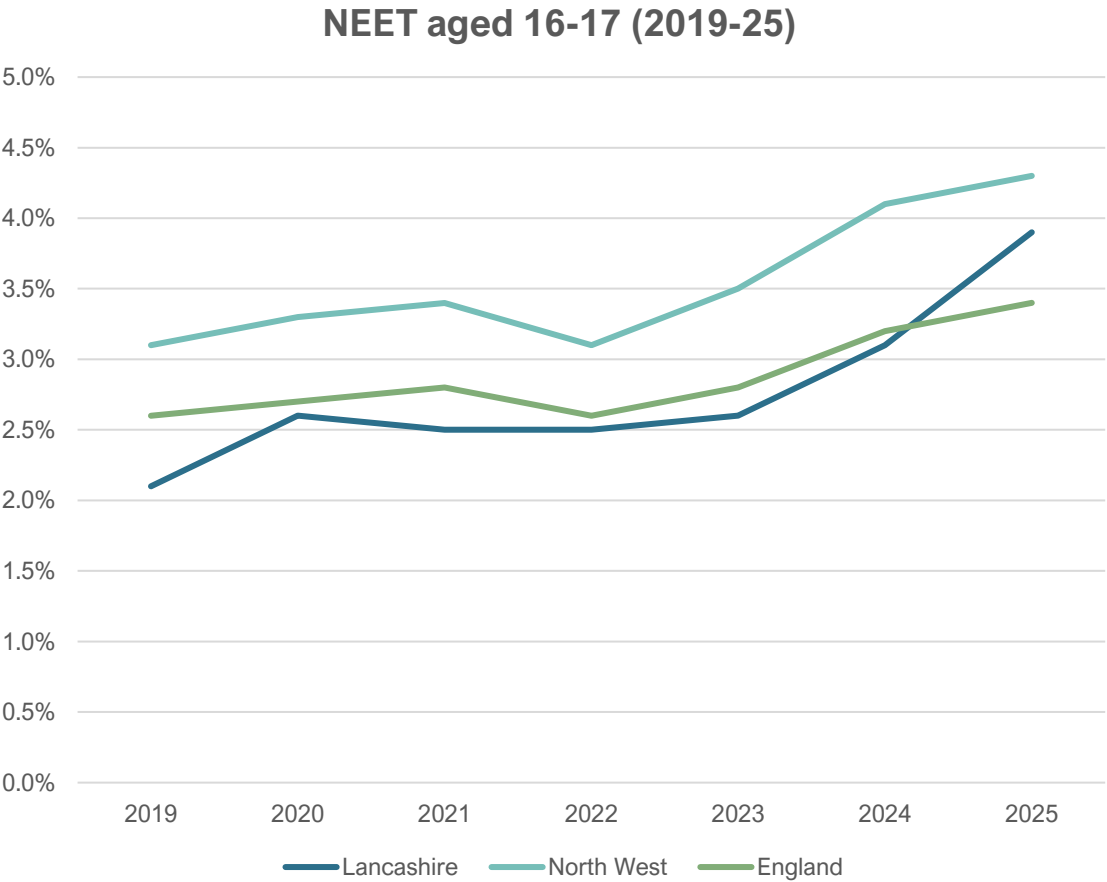


Occupational employment 4UA B (2021)



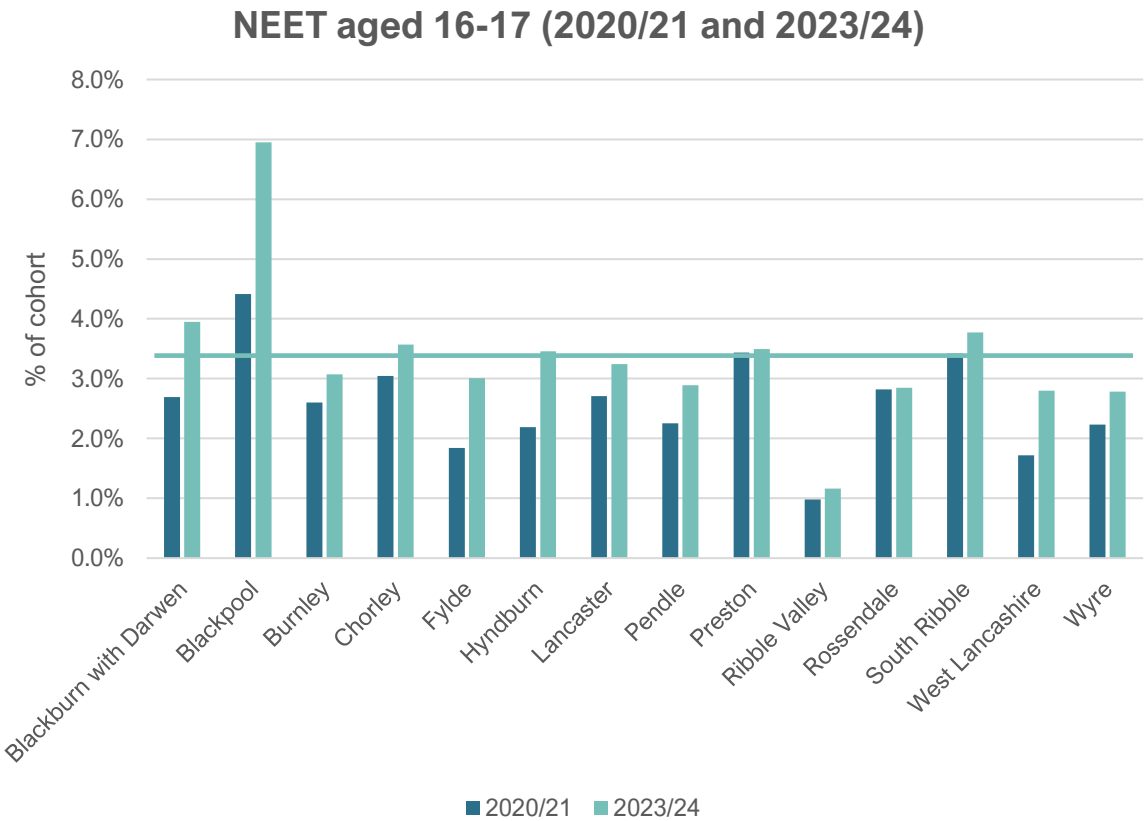
- ONS Annual Population Survey (APS) unavailable below LA level so we have used the ONS Census to source information on the occupations residents are employed in by UA. Figures will vary to those to other options as census occupation data refers to all residents aged over 16 whereas the data for other options considers employment by occupation from the ONS APS held by the working age (16-64) population.
- South has the highest proportion of residents working in high skilled occupations at almost half of residents aged over 16, with higher proportions working as managers/directors compared to other UAs. This corresponds with higher proportions qualified to level 4+, and the highest annual earnings.
- North has the next highest proportion working in high skilled occupations – North and South have the highest proportions qualified to degree level and above.
- East has the lowest proportion working in high skilled occupations and both East and West, over half of residents aged over 16 are working in lower skilled occupations. In both UAs, 11% are working in elementary occupations and in the East 10% are working as process, plant or machine operatives.

NEET



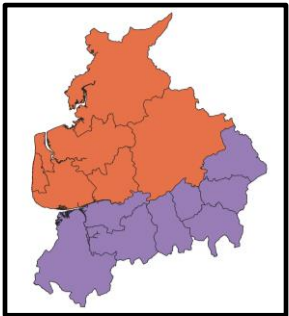
- NEET levels have been rising over recent years in Lancashire, reflective of regional and national trends.
- There has been a rise from 2.1% in 2019 to 3.9%, rising from a point where NEET levels were below nationally to being 0.5 percentage points above and only just below regional levels.
- There has been a steep rise in NEET levels from 3.1% to 3.9% over the last year.
- Most recent estimates are only available at a unitary authority level (Lancashire, Blackburn and Blackpool)
 - Blackburn a rise from 4.0% to 4.7% between 2024 and 2025
 - Blackpool a rise from 7.0% to 7.6% between 2024 and 2025.

NEET local authority

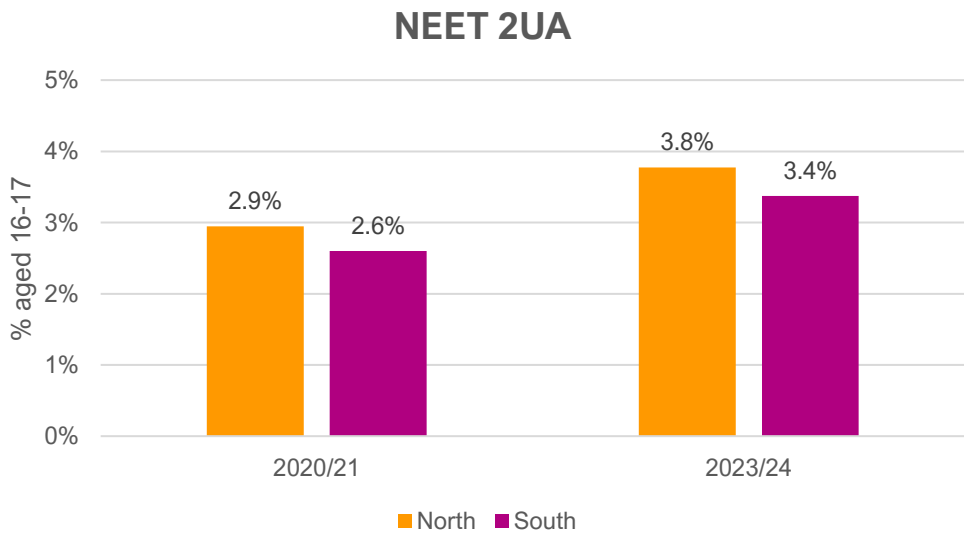


- NEET levels have been rising over recent years across Lancashire apart from in Rossendale and Preston which have seen little change up to 2023/24.
- The horizontal line shows the national average of 3.4% of 16-17 year olds who are NEET in 2023/24.
- There are three districts with higher than national NEET levels particularly in Blackpool where 7% of 16-17 year olds were NEET in 2023/24, which has risen to 7.6% in 2024/25. Blackburn and South Ribble have high NEET levels at around 4%, and this has risen to 4.7% in Blackburn in 2024/25.
- Chorley, Hyndburn, and Preston all have around national NEET levels.
- Half of districts have lower than national NEET levels – particularly in Ribble valley at just over 1% of 16-17 year olds. NEET levels are also below 3% in Rossendale, West Lancashire, Wyre. and Pendle.

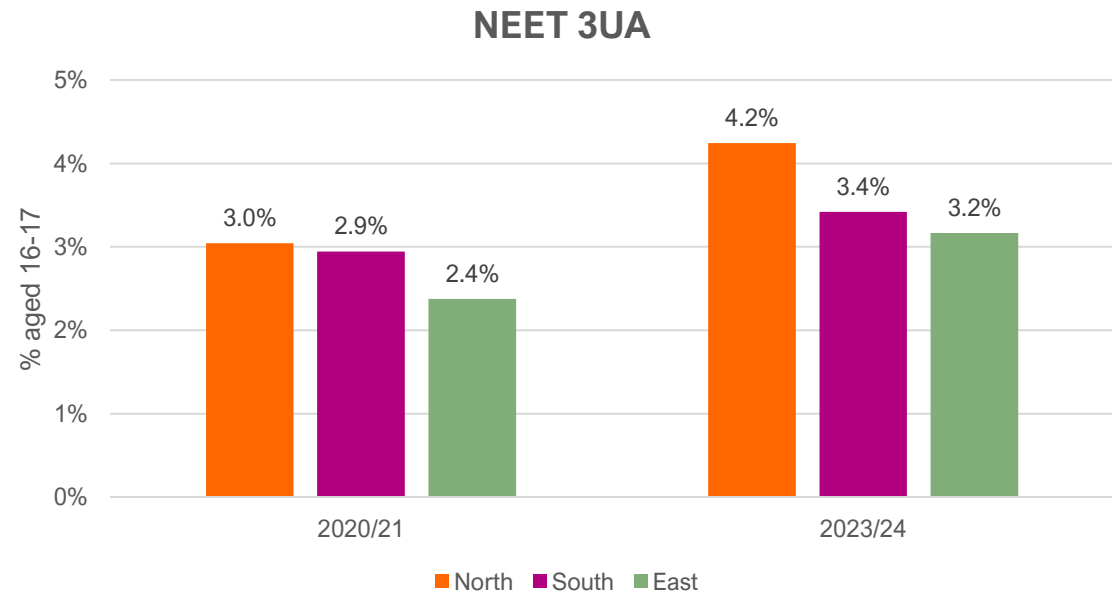
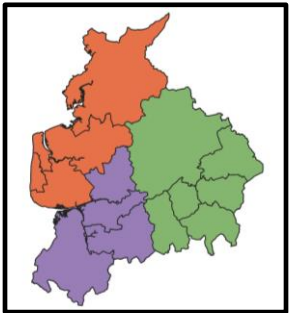
NEET – 2UA



- NEET levels continue to be lower in the South although both UAs have seen a rise in recent years.
- South has seen a rise from 2.6% to 3.4% in 2023/24, in line with the national average.
- North has seen a rise from 2.9% to 3.8% in 2023/24, slightly above levels in the South but remaining below the 4.3% regional average.
- The gap of 0.4 percentage points between the highest and lowest NEET rate is the lowest across LGR options.

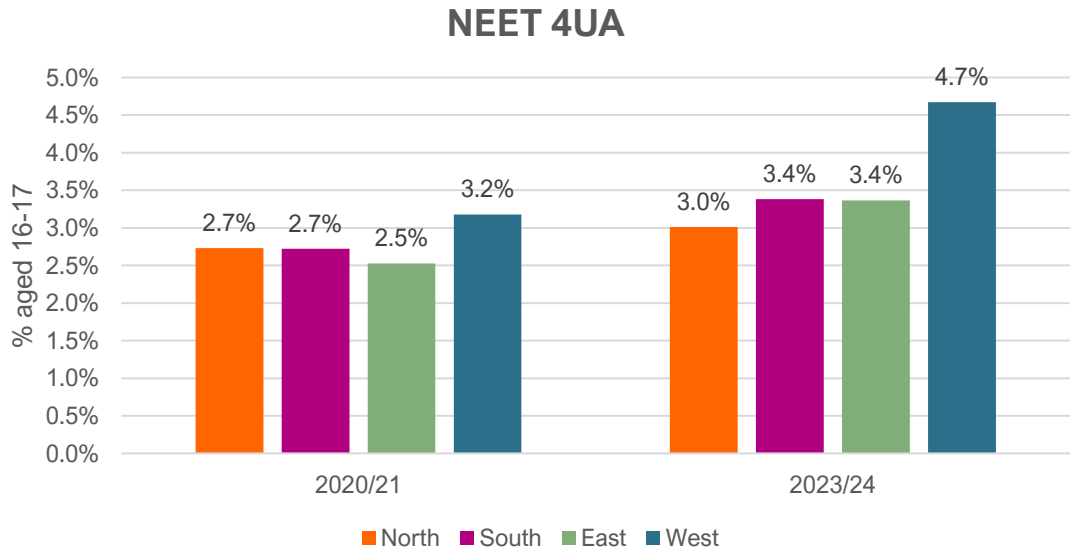
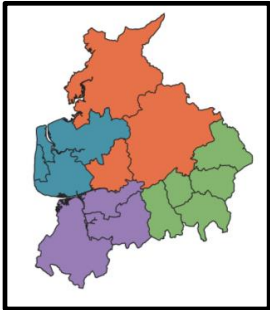


NEET – 3UA



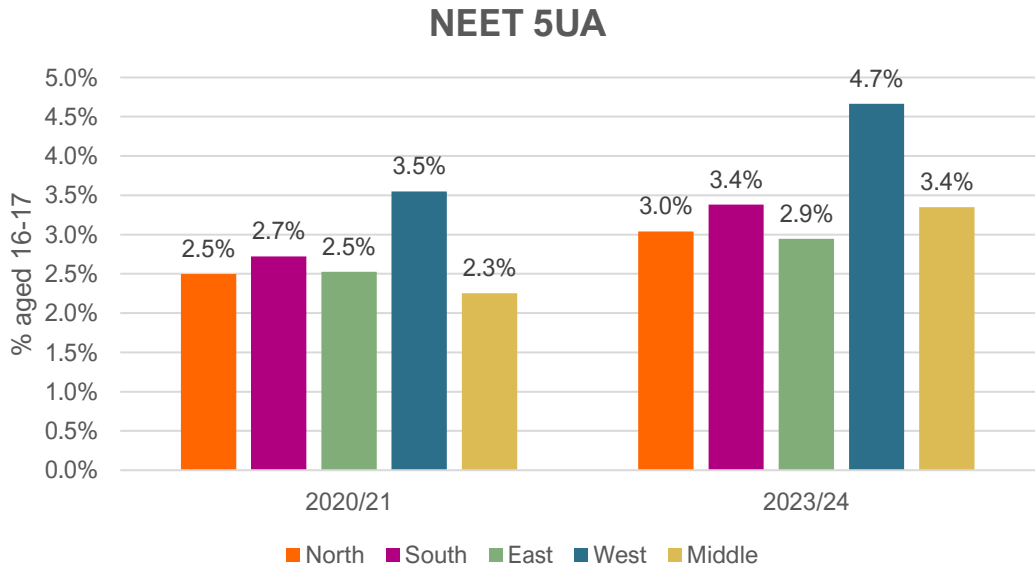
- All 3UAs have seen a rise in NEET levels.
- North has the highest NEET levels rising to 4.2% of 16-17 year olds, above the national average and in line with 4.3% regional average. North has seen the sharpest rise in NEET levels of the 3UAs.
- East has seen a sharper rise in NEET levels than South Lancashire, although East continues to have the lowest NEET levels of 3.2%, with 3.4% in the South, both roughly in line with the national average.
- There is a 1.1 percentage point gap between area with the lowest NEET rate of East and highest NEET rate in North, although this is lower than options 4 and 5.

NEET – 4UA



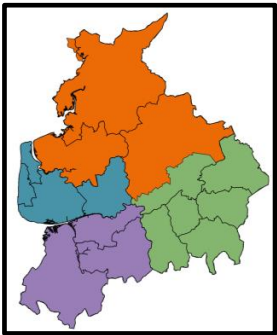
- All UAs have seen a rise in NEET with by far the sharpest rise in West Lancashire particularly in Blackpool. NEET levels in West Lancashire have risen to above the regional average.
- South and East have seen rises to 3.4%, in line with the regional average.
- North has seen the smallest rise in NEET levels and is the only UA with NEET levels below regional and national averages.
- The gap between UA with the lowest NEET levels in North and highest in West is 1.7 percentage points, among the highest across LGR options.

NEET – 5UA

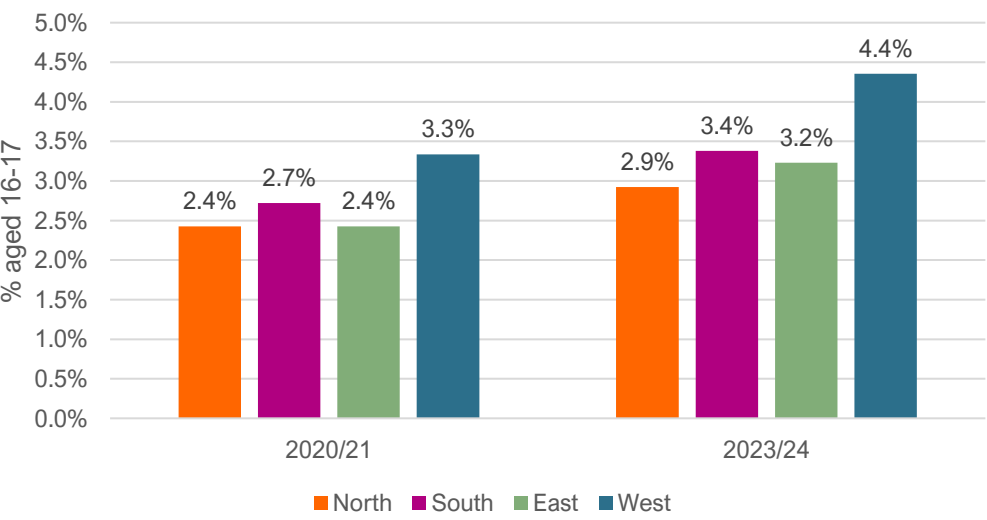


- All UAs have seen a rise in NEET with by the sharpest rise in the West particularly in Blackpool. NEET levels in the West have risen to above the regional average.
- Middle has also seen a steep rise in NEET levels and has the joint second highest NEET levels with South in line with national averages.
- North and East have seen the smallest rises in NEET levels and are the only UAs with NEET levels below regional and national averages.
- The gap between UA with the lowest NEET levels in East and highest in West is 1.7 percentage points, among the highest across LGR options.

NEET – 4UA B



NEET 4UA B

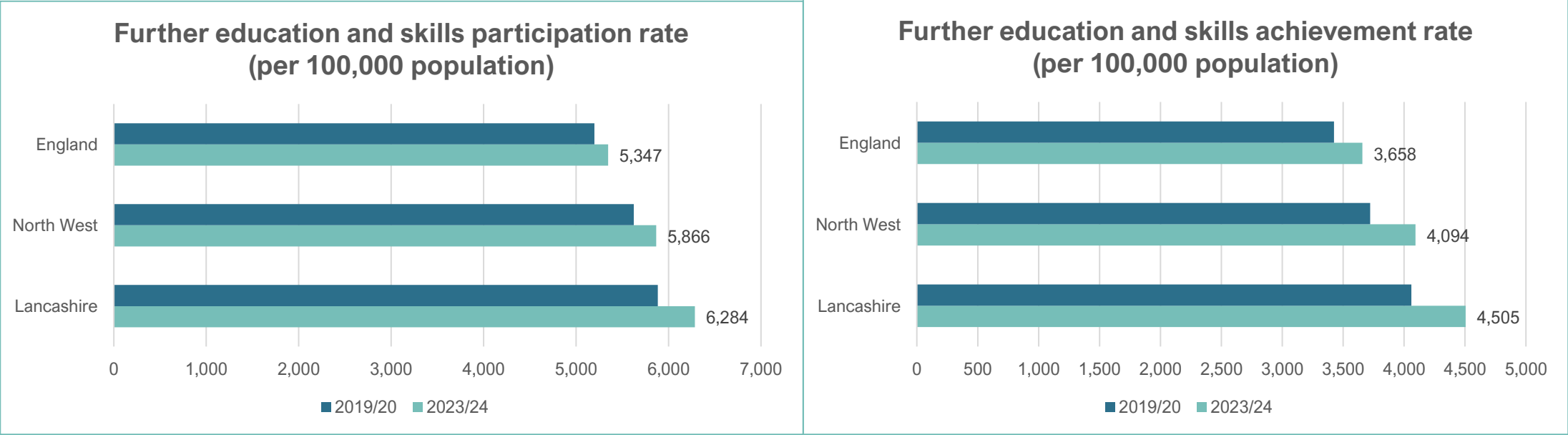


- NEET data unavailable below LA level so we have used the proportion of 16-17 year olds in North and South Ribble Valley, and multiplied this by the number of 16-17 year olds who are NEET in Ribble Valley, and summed these to their respective UAs. The same process was followed for Rural and Urban Wyre to get UA estimates.
- East and South have seen rises to 3.2% and 3.4% respectively, in line with the regional average.
- North has seen the smallest rise in NEET levels and is the only UA with NEET levels below regional and national averages.
- The gap between the UA with the lowest NEET levels in North and highest in West is 1.4 percentage points.

Further education and skills

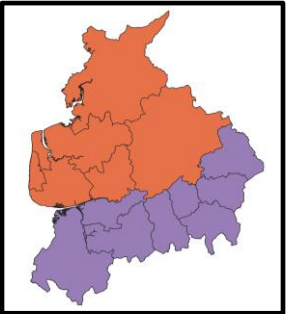
Lancashire continues to have strong participation and achievements in further education and skills following a decline due to restrictions put in place following the Covid-19 Pandemic. There are 45,900 people participating in further education and skills equating to almost 6,300 per 100,000 population, above both national and regional averages.

There have been 32,900 learner achievements equating to 4,500 achievements per 100,000 population again above both national and national averages. Achievements are high in Blackburn (6,650), Burnley (6,431), Pendle (6,331), Hyndburn (6,042), Preston (5,281), and Blackpool (5,820) with an achievement rate above 5,000 per 100,000 population. Achievement rates are lower in Ribble Valley (3,799), Lancaster (3,513), Chorley (3,509), and West Lancashire (3,093).

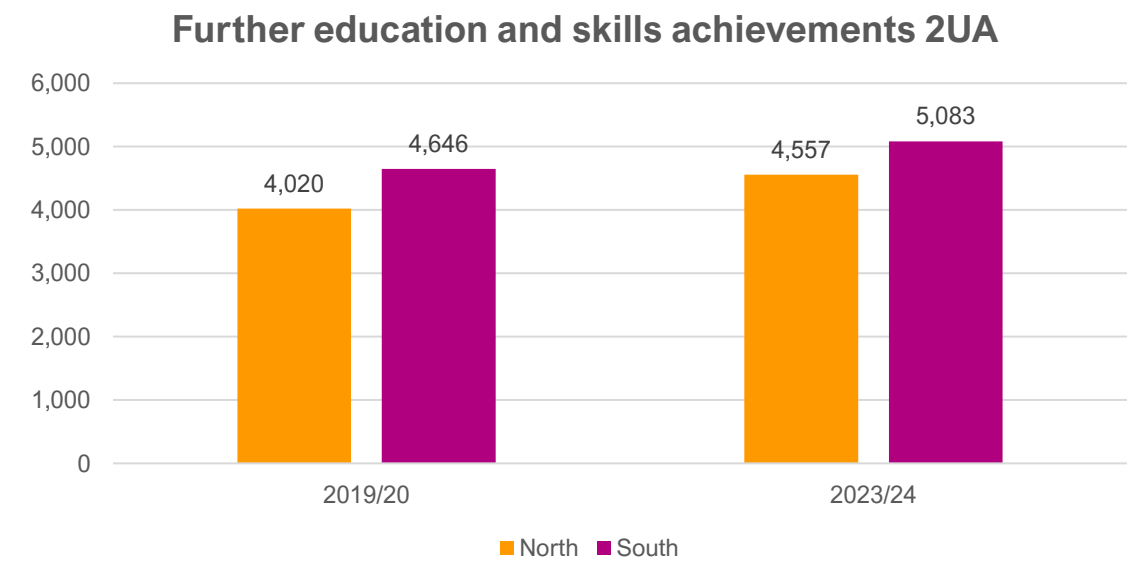


Source: Further Education and skills, DfE, 2025

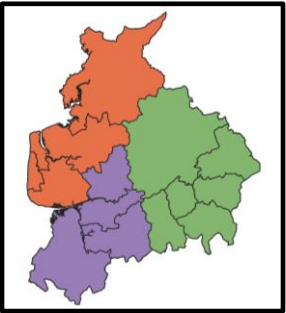
Further education and skills – 2UA



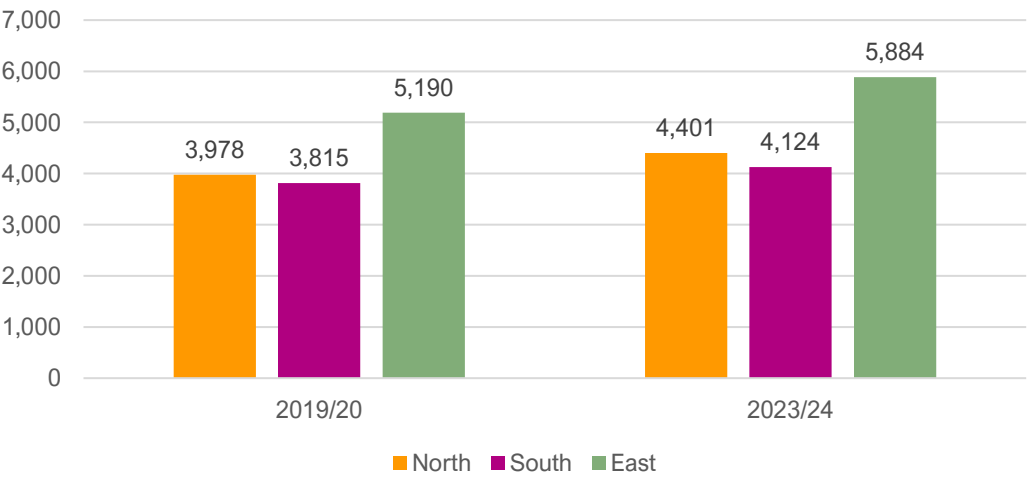
- South continues to have higher further education achievements levels at 5,083 achievements per 100,000 population. There are 25,200 learner achievements across South.
- There are 18,700 achievements in North equating to 4,557 achievements per 100,000 population.
- Both are above the regional average of 4,100 achievements per 100,000 population.



Further education and skills – 3UA

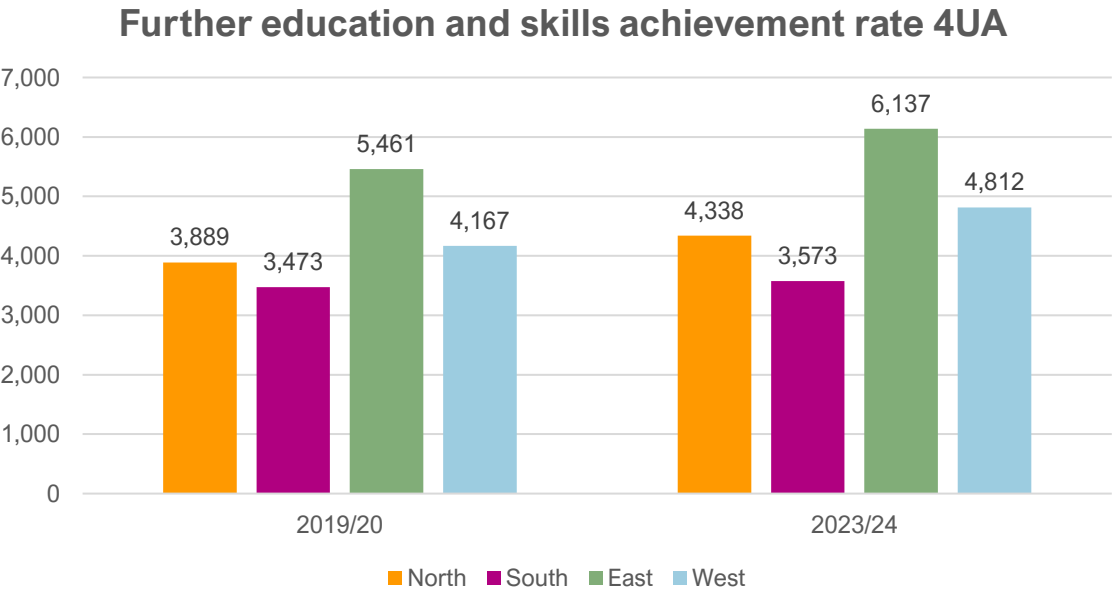
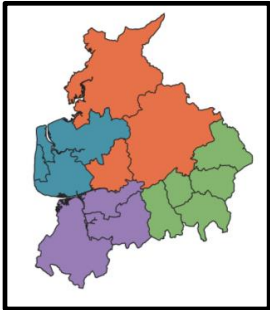


Further education and skills achievement rate
3UA



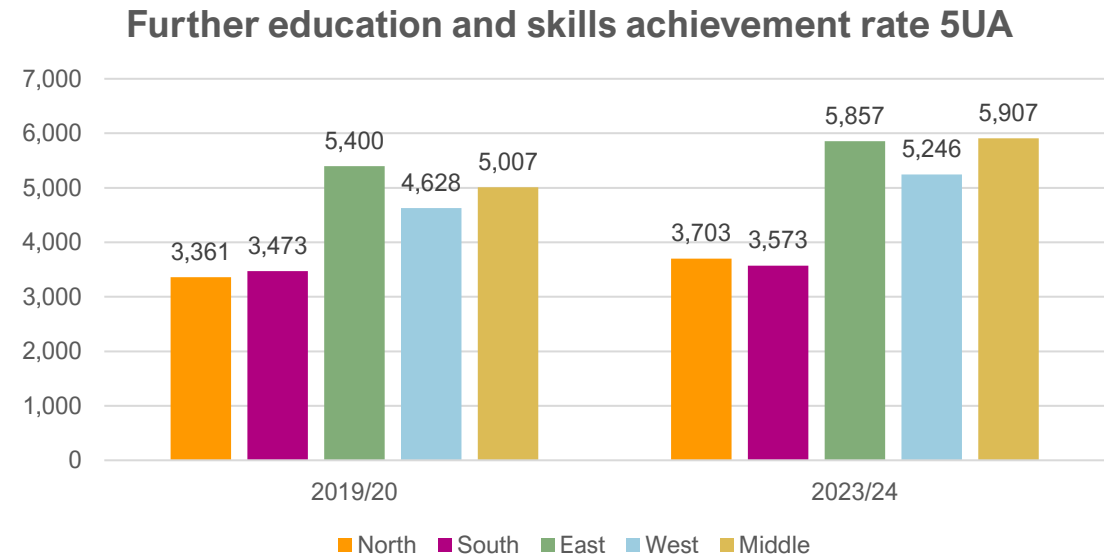
- All 3UAs have seen an increase in further education and skills achievements following the Covid-19 Pandemic.
- East has seen the strongest rise of 2,600 learner achievements to 19,300 in 2023/24 equating to 5,884 achievements per 100,000 population – well above regional and national rates.
- North has also seen a strong rise in learner achievements of around 1,600 to 12,200 in 2023/24 equating to 4,401 achievements per 100,000 population – again above 4,100 regional rate.
- South has seen a smaller rise in achievement of 1,400 to 12,400 in 2023/24 equating to 4,124 achievements per 100,000 population – South is in line with regional rate.

Further education and skills – 4UA



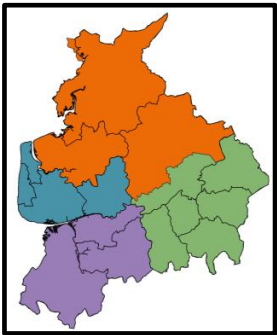
- All 4UAs have seen a rise in learner achievements although to varying extents.
- East continues to have the highest number of learner achievements rising by 2,300 to 17,950 in 2023/24 equating to 6,137 achievements per 100,000 population. This at least over 2,000 achievements than regional and national rates and far higher than other UAs.
- West and North have also seen strong rises in learner achievements. In West, achievements have risen by 1,400 to 9,150 in 2023/24 equating to 4,812 achievements per 100,000 population.
- North has seen a rise of 1,500 achievements to 9,550 in 2023/24, equating to 4,338 achievements per 100,000 population – both above the regional rate.
- South has seen the smallest rise in learner achievements by 380 to 7,290 in 2023/24 equating to 3,573 achievements per 100,000 population – the only UA below the regional average although roughly in line with national rates.

Further education and skills – 5UA

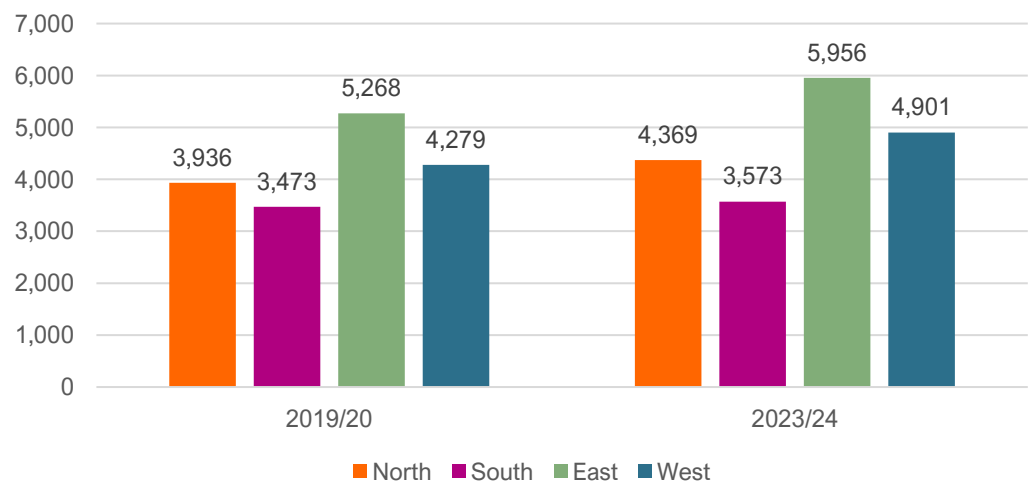


- Middle and East have the highest achievement rates both almost at 6,000 achievements per 100,000 population. Achievements in Middle have risen by almost 2,000 to 10,400 in 2023/24 and in East by 800 to 8,900 – Middle and East achievement rates almost 2,000 higher than regionally.
- West has seen a strong rise in learner achievements by 1,800 to 11,800 in 2023/24 equating to 5,246 achievements per 100,000 population – achievement rate is over 1,000 above regionally.
- Achievement rates are more subdued in North and South. Learner achievements have risen by around 800 in North in 2023/24 equating to 3,703 achievements per 100,000 population.
- South has seen a smaller rise of 300 achievements to 7,300 in 2023/24 equating to 3,573 achievements per 100,000 population. Both North and South are below the regional achievement rate and roughly in line with nationally.

Further education and skills – 4UA B



Further education and skills achievement rate
4UA B



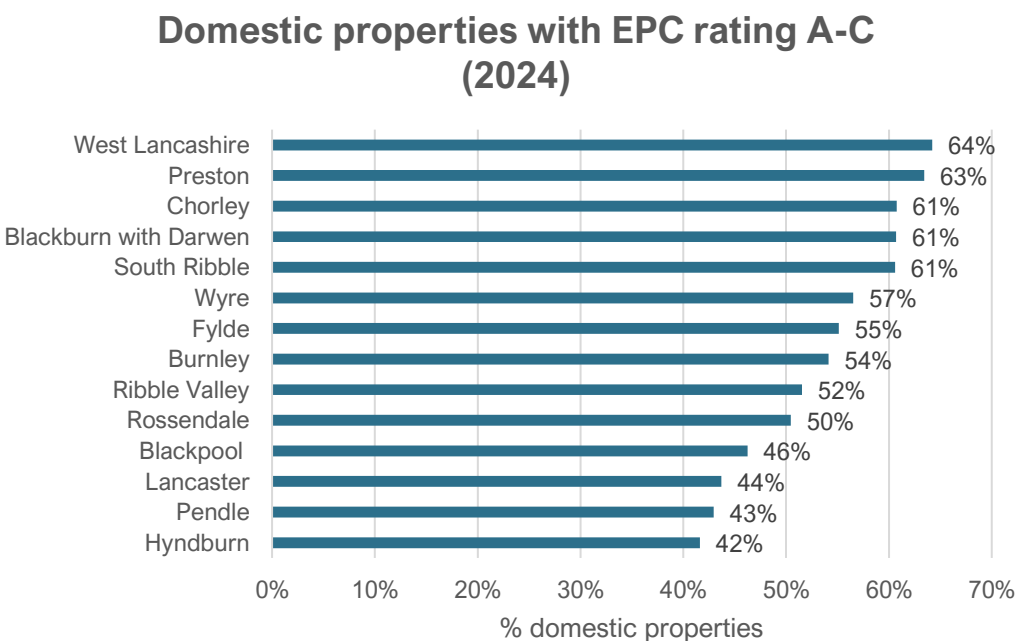
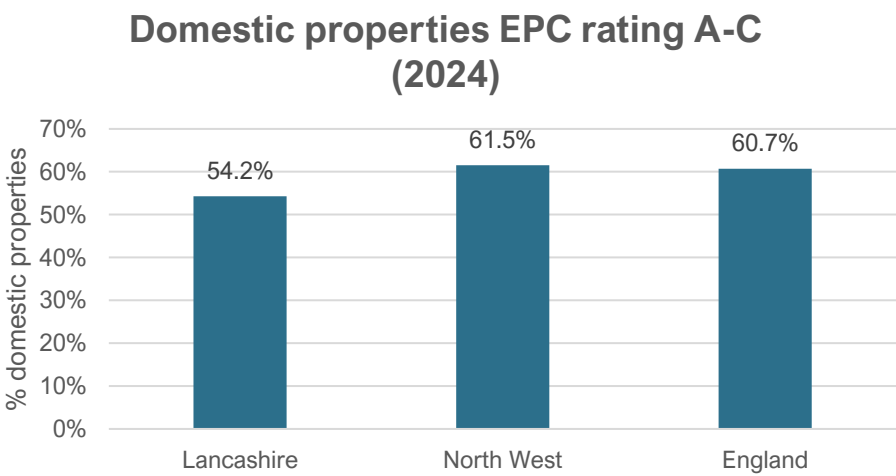
- FE achievements data unavailable below LA level so we have used the proportion of the working age population in North and South Ribble Valley, and multiplied this by the number of FE achievements in Ribble Valley, and summed these to their respective UAs. The same process was followed for Rural and Urban Wyre to get UA estimates.
- East continues to have the highest number of learner achievements rising by 2,550 to 18,860 in 2023/24 equating to 5,956 achievements per 100,000 population. This around 2,000 achievements higher than regional and national rates and far higher than other UAs.
- West and North have also seen strong rises in learner achievements. In West achievements have risen by 1,230 to 8,500 in 2023/24 equating to 4,901 achievements per 100,000 population. North has seen a rise of 1,450 achievements to 9,330 in 2023/24, equating to 4,370 achievements per 100,000 population – both above the regional rate.
- South has seen the smallest rise in learner achievements by 380 to 7,290 in 2023/24 equating to 3,573 achievements per 100,000 population – the only UA below the regional average although roughly in line with national rates.

Source: Further Education and skills, DfE, 2025; Population by ward, ONS, 2024

Investment and regeneration

Housing quality – EPC rating

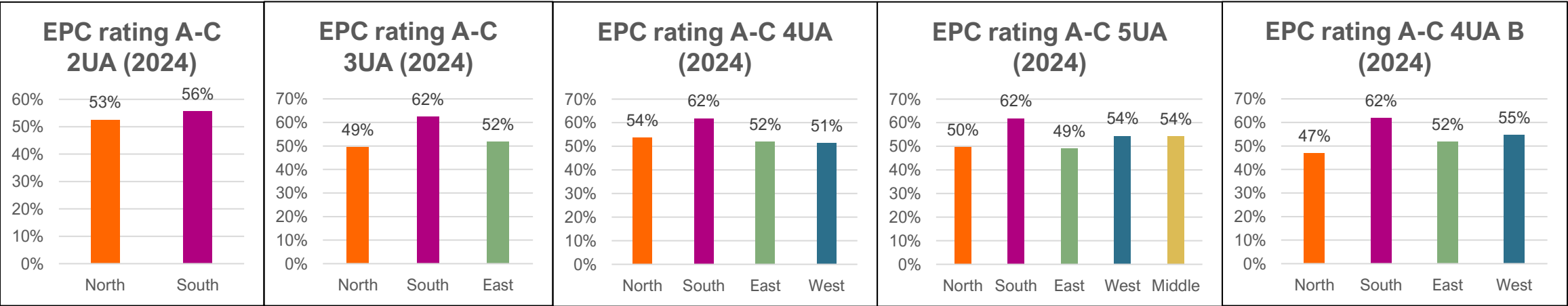
- We have used the proportion of domestic properties with an EPC rating of C or higher to help proxy for housing quality.
- Just over half of domestic properties in Lancashire have an A-C EPC rating, below the 60-61% regionally and nationally.
- In some areas housing quality appears to be higher, where more domestic properties have an EPC rating of A-C in West Lancashire, Preston and Chorley.
- Housing quality appears to be lower in Hyndburn, Pendle, Lancaster, Blackpool and Rossendale where half of less of domestic properties have an EPC rating of A-C



Source: Live tables on Energy Performance of Buildings Certificates, MHCLG, 2025

Housing quality – EPC rating

- Consistency across options apart from 2UA where there is little difference, although South has a higher proportion of properties with an EPC rating A-C.
- South UA across options has the highest proportion of properties with an EPC rating A-C at 62%.
- The remaining UAs have a lower proportion around 50% of properties.
- North the lowest in options 3 and 4UA B, which has the lowest proportion of properties with an A-C rating across options.
- West has the lowest in 4UA although little difference to East UA.
- East has the lowest proportion in 5UA but little difference to North UA.

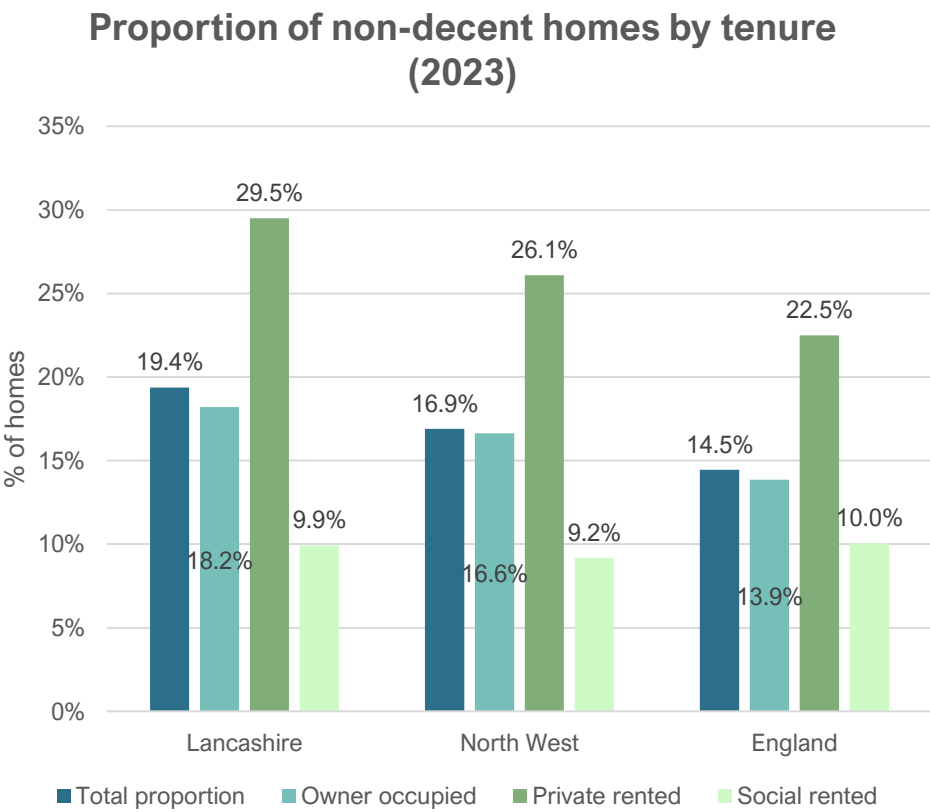


Note: The lowest level of geography for EPC property estimates is at a district level. To proxy we have taken the proportion of households in North and South Ribble Valley within Ribble Valley and multiplied this by the number of properties in Ribble Valley with an EPC rating A-C to get estimates for North and South Ribble Valley. The same process was followed to get estimates for Rural and Urban Wyre. These estimates were then summed with the remaining 12 districts to get UA estimates.

Source: Live tables on Energy Performance of Buildings Certificates, MHCLG, 2025; ONS Census 2021

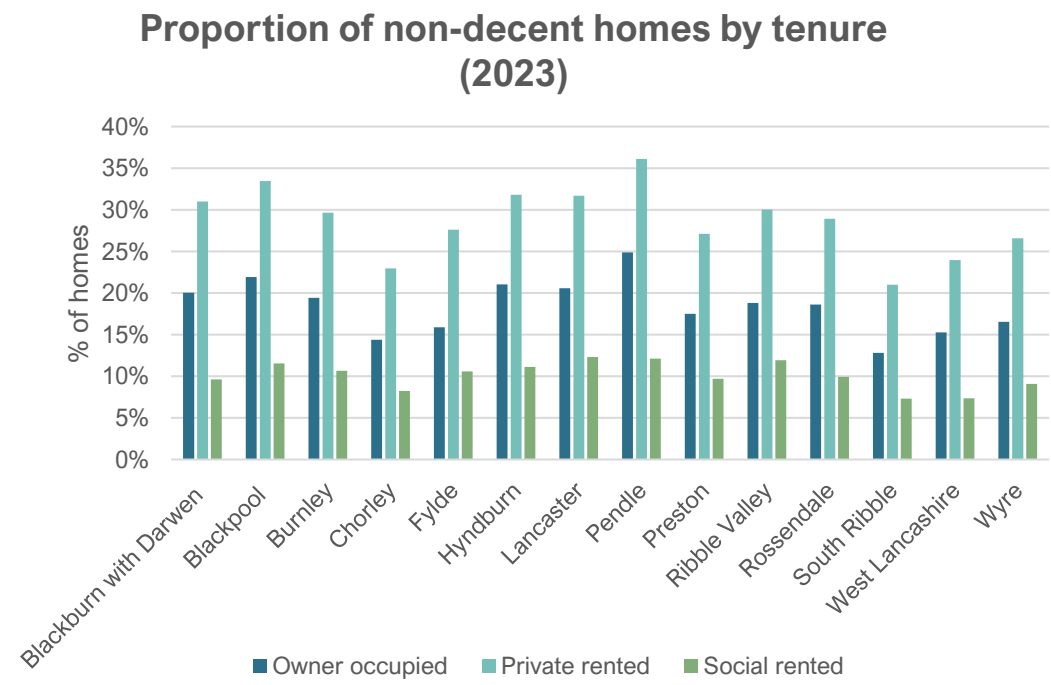
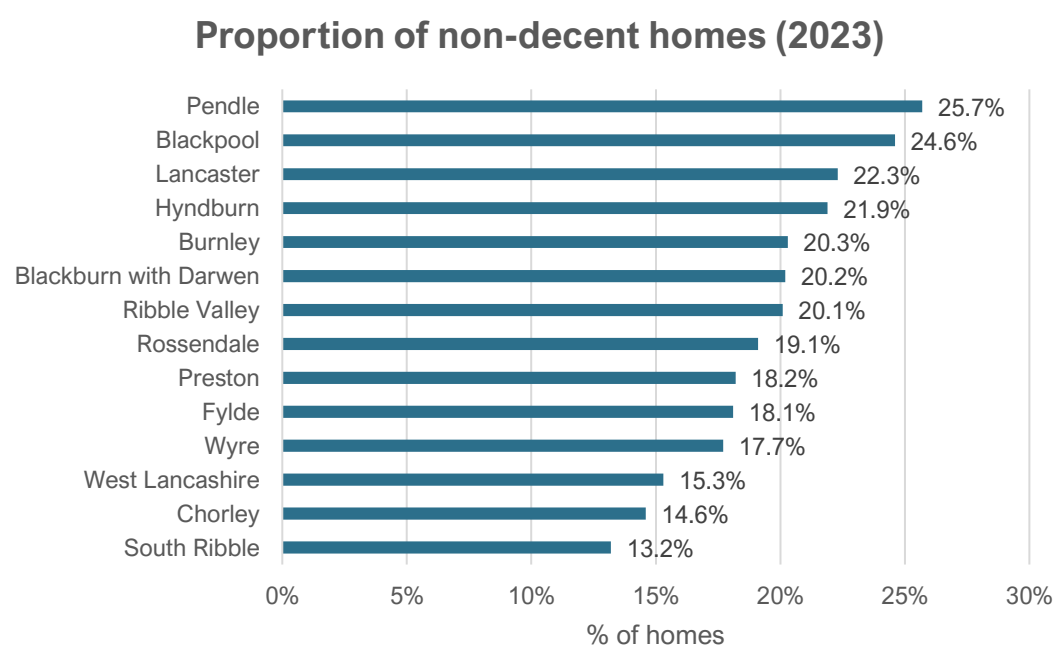
Housing quality – non-decent homes

- Another proxy for housing quality is the proportion of non-decent homes within an area.
- *For a dwelling to be considered ‘decent’ under the Decent Homes Standard, it must:*
 - *meet the statutory minimum standard for housing (the Housing Health and Safety Rating System, since April 2006) – homes which contain a Category 1 hazard under the HHSRS are considered non-decent*
 - *be in a reasonable state of repair*
 - *have reasonably modern facilities and services*
 - *provide a reasonable degree of thermal comfort*
- The proportion of dwellings which are considered to be non-decent is higher in Lancashire at 19.4% compared to 14.5% nationally and 16.9% regionally.
- Almost 30% of private rented dwellings considered to be non-decent in Lancashire, above regional and national proportions of private rented dwellings.



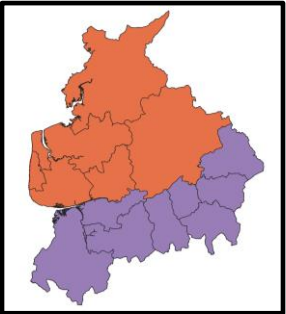
Housing quality – non-decent homes

- Variation across the county with almost half of districts having a fifth or more of homes classed as non-decent, rising to a quarter in Pendle and Blackpool.
- Whereas the proportion of homes classed as non-decent in South Ribble, Chorley and West Lancashire is below the 16.9% regional average.
- Private rented dwellings have the highest proportion of non-decent homes, rising to 30% or above in Pendle, Blackpool, Hyndburn, Lancaster, Blackburn, and Ribble Valley, although South Ribble and Chorley in line with 22.5% of private rented properties nationally.

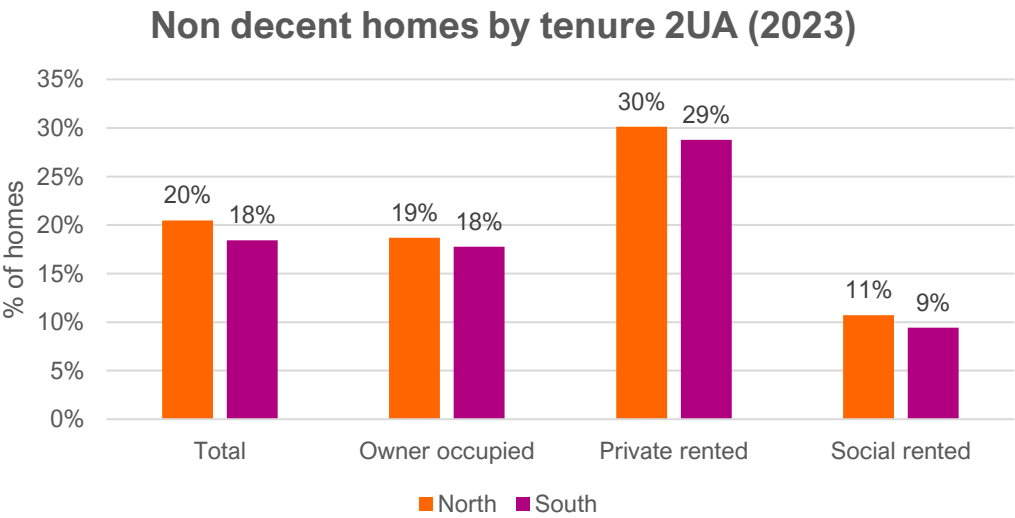


Source: English Housing Survey: Local Authority Housing Stock Condition Modelling, MHCLG, 2025

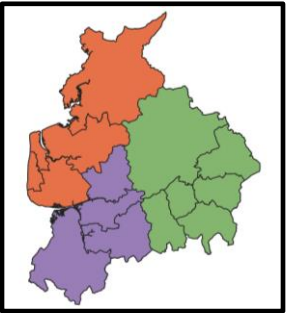
Non-decent homes – 2UA



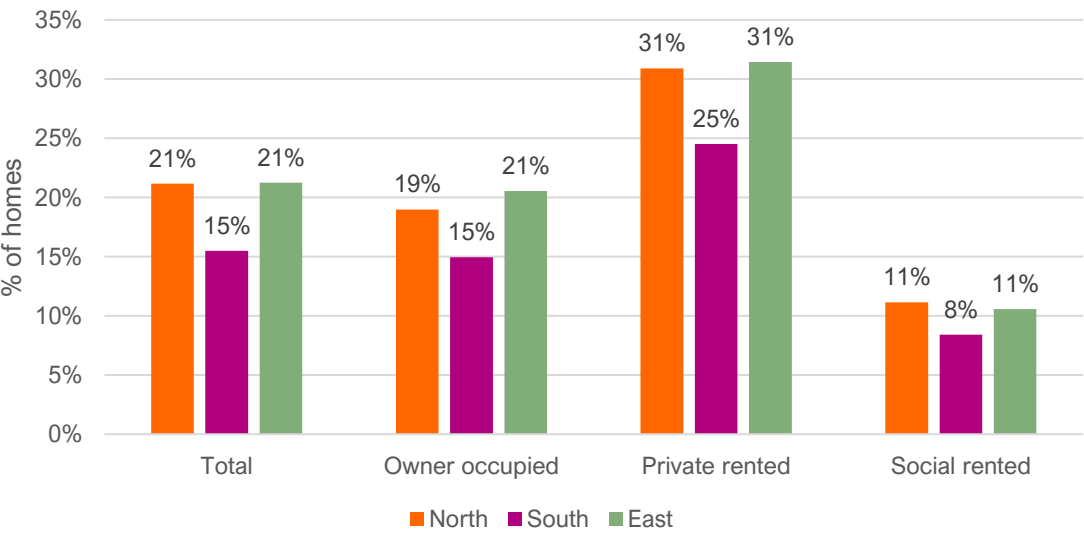
- North has slightly more non-decent homes as compared to South but little difference between the UAs.
- Private rented properties most likely to be classed as non-decent and social rented the least.



Non-decent homes – 3UA

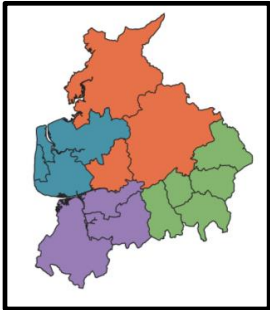


Non decent homes by tenure 3UA (2024)

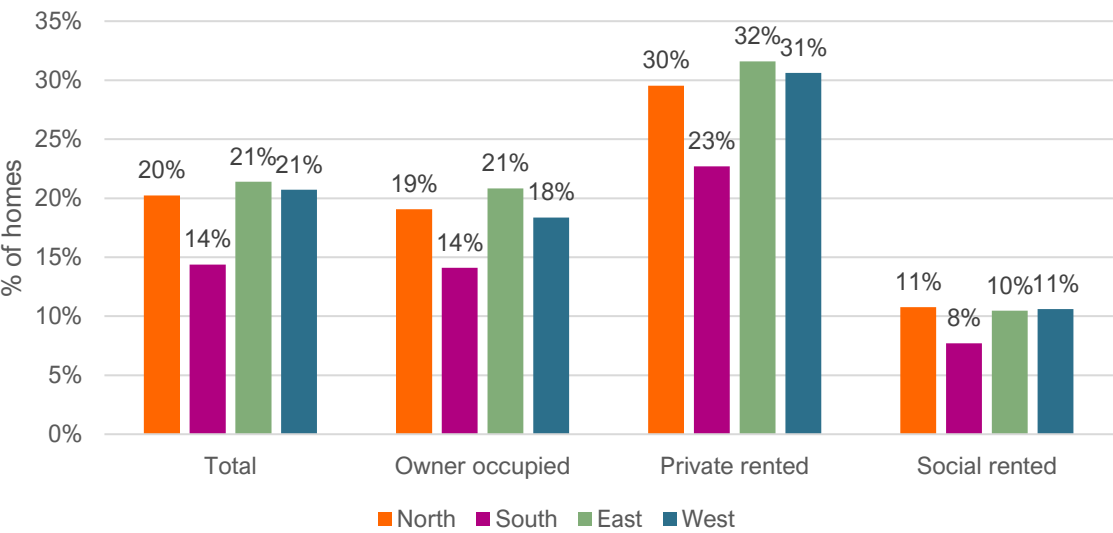


- Over a fifth of homes in North and East UAs are classed as non-decent – almost a third of private rented homes in both UAs are classed as non decent.
- East has a slightly higher proportion of owner occupied homes which are non-decent.
- South has a lower proportion of non decent homes across tenures but still a quarter of private rented homes are classed as non-decent in the South UA.

Non-decent homes – 4UA



Non decent homes by tenure 4UA (2023)

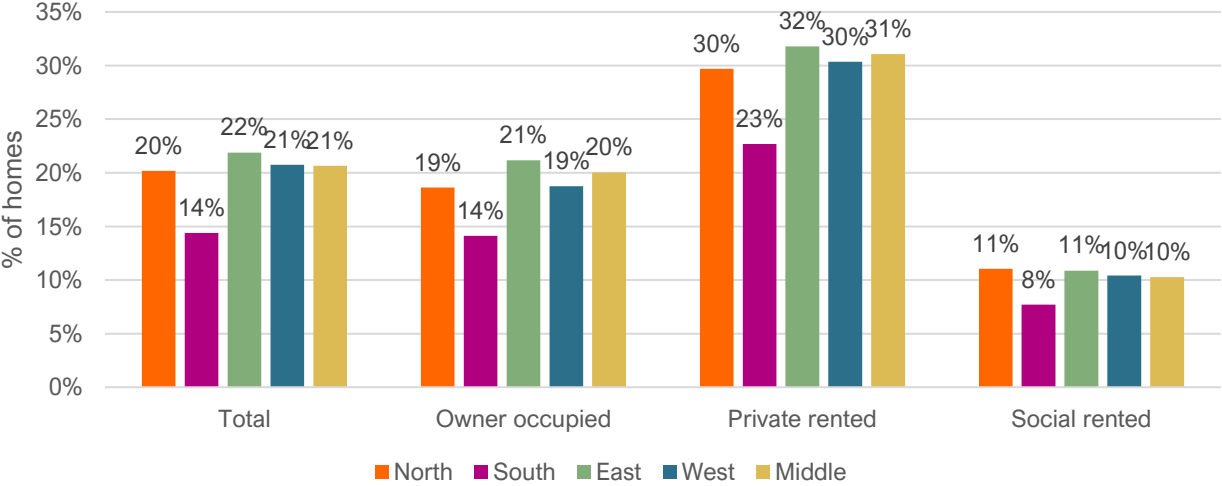


- East, West and North UAs, at least a fifth of total properties are classed as non-decent.
- This rises to almost a third across the East, West and North UAs for private rented homes.
- East has a slightly higher proportion of owner occupied homes which are classed as non-decent.
- South has the lowest proportion of homes which are classed as non-decent at 14% of homes although this rises to 23% of private rented homes.

Non-decent homes – 5UA

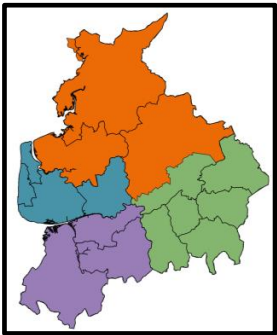


Non decent homes by tenure 5UA (2023)

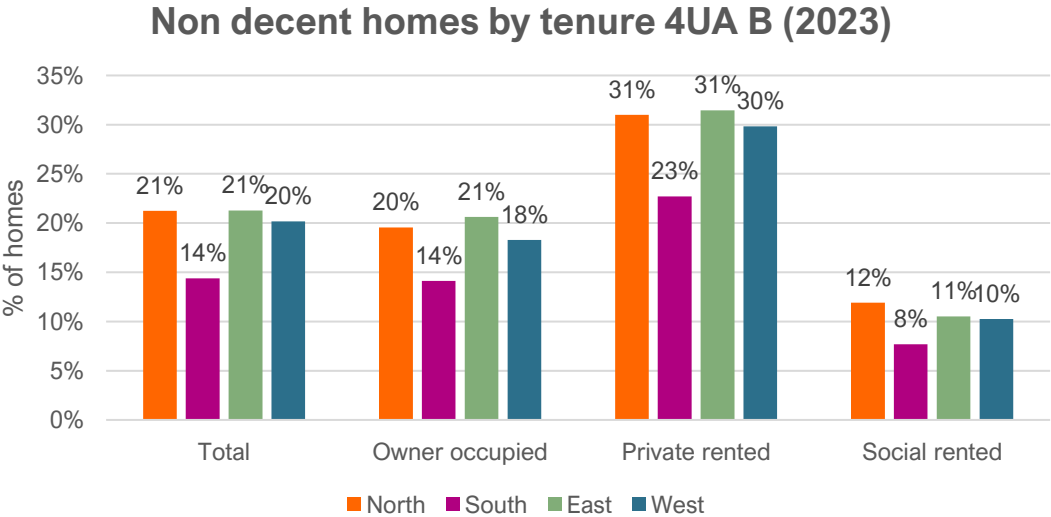


- East, West, Middle and North UAs, at least a fifth of total properties are classed as non-decent.
- This rises to almost a third across the East, West, Middle and North UAs for private rented homes.
- East has a slightly higher proportion of owner occupied homes which are classed as non-decent.
- South has the lowest proportion of homes which are classed as non-decent at 14% of homes although this rises to 23% of private rented homes.

Non-decent homes – 4UA B



- East, West and North UAs, at least a fifth of total properties are classed as non-decent.
- This rises to almost a third across the East, North, and West UAs for private rented homes.
- East has a slightly higher proportion of owner occupied homes which are classed as non-decent.
- South has the lowest proportion of homes which are classed as non-decent at 14% of homes although this rises to 23% of private rented homes.

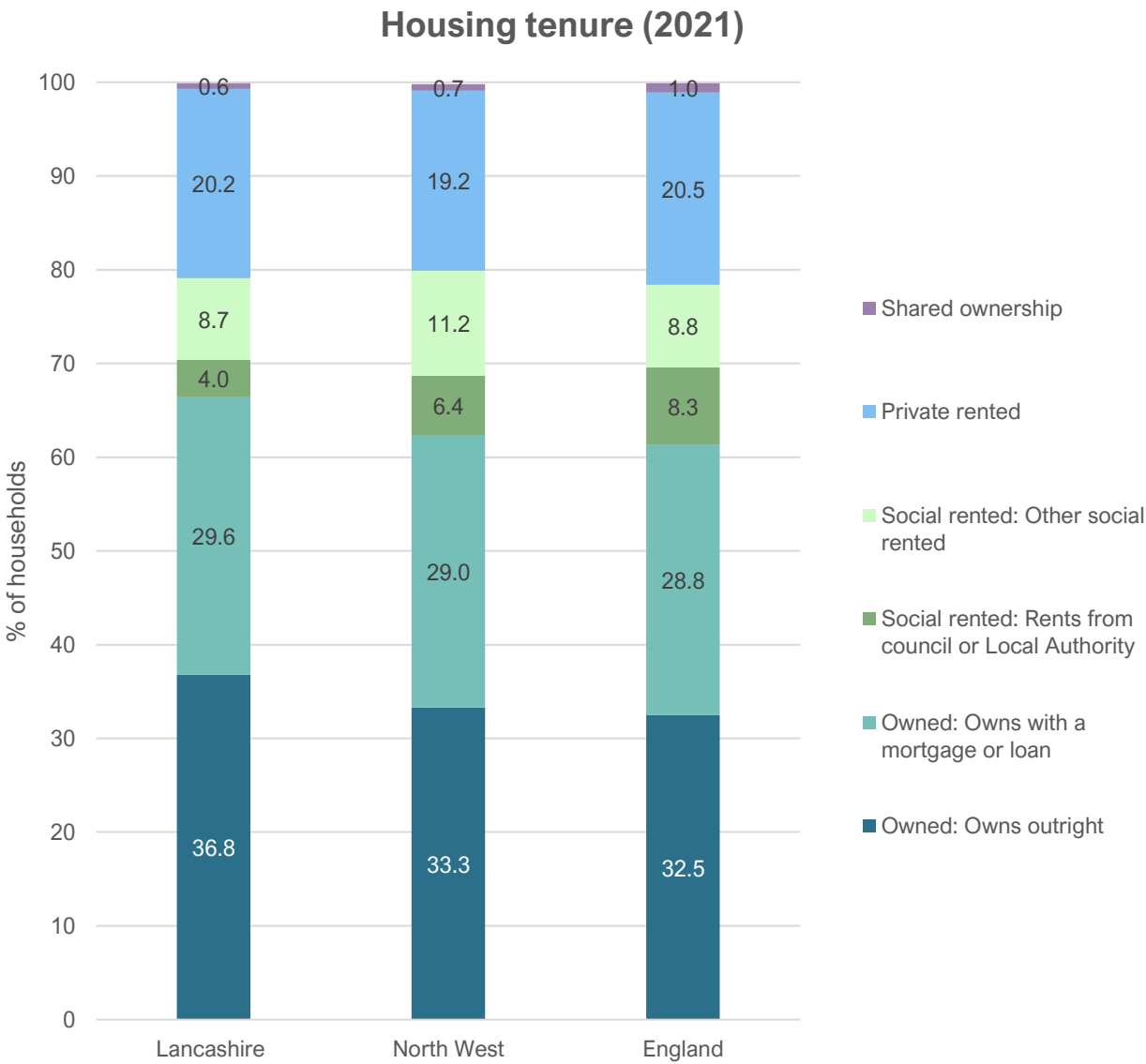


Note: The lowest level of geography for estimates for non-decent homes is at a district level. To proxy we have taken the proportions North and South Ribble Valley make up by tenure within Ribble Valley and multiplied these by the number of non-decent properties in Ribble Valley, which have then been summed to the UAs they are located in option 4UA B. The same process was followed for Rural and Urban Wyre.

Source: English Housing Survey; Local Authority Housing Stock Condition Modelling, MHCLG, 2025; ONS Census 2021

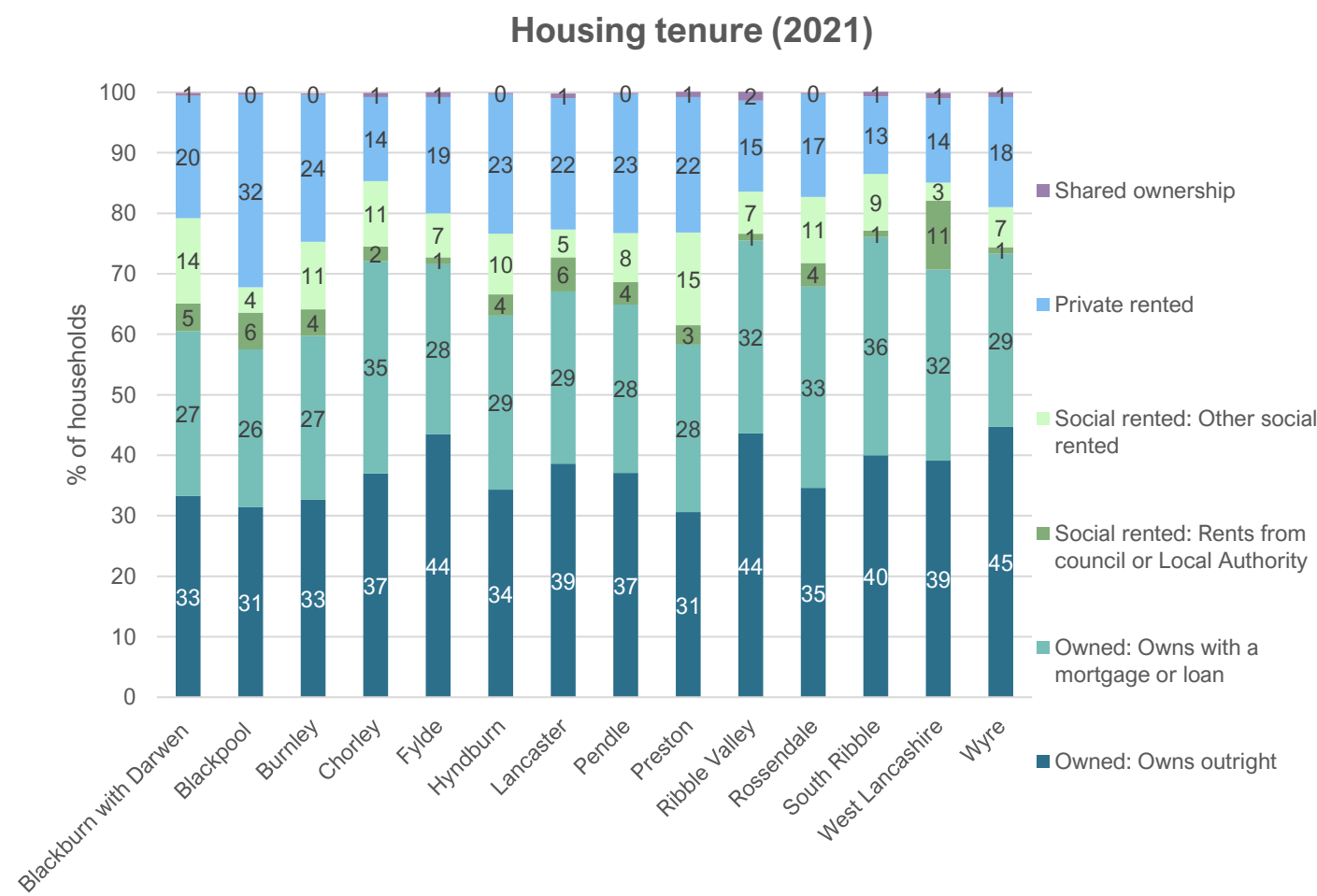
Housing tenure

- At the Lancashire level housing tenure is similar to regionally and nationally although a slightly higher proportion of owner occupied houses – making up two thirds of total households in Lancashire compared to 61-62% regionally and nationally, with a higher proportion owning their house outright in Lancashire, similar proportions owning with a mortgage or loan
- A slightly lower proportion of socially rented dwellings in Lancashire particularly rented from council or local authority.
- A fifth of total households privately renting, a slightly higher proportion compared to regionally

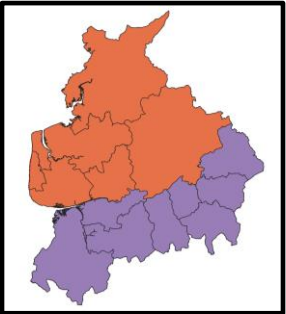


Housing tenure – districts

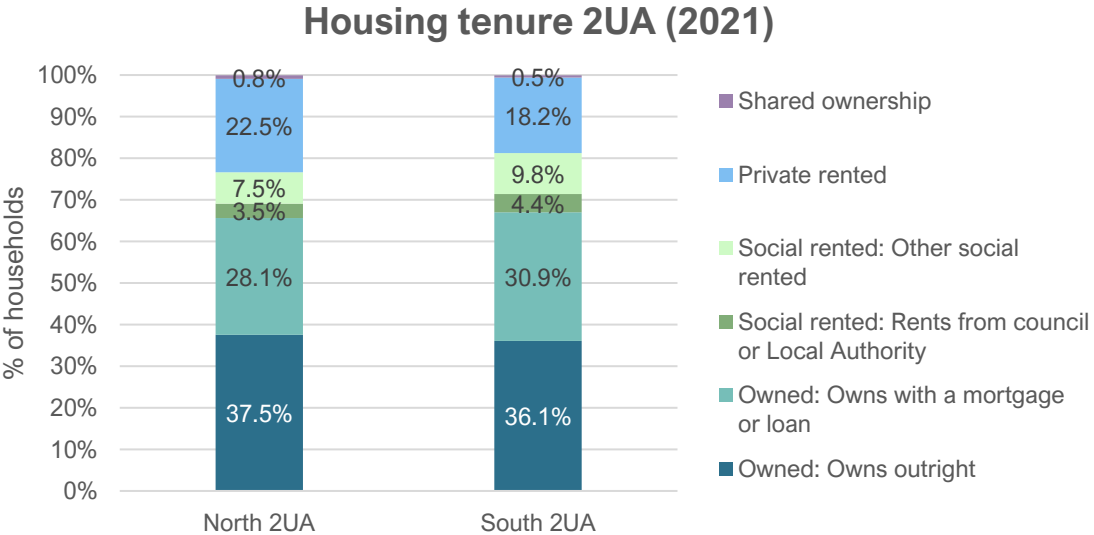
- Wide variation across districts. Over 70% of households own their house either outright or with a mortgage in Ribble Valley, South Ribble, Wyre, Chorley, Fylde and West Lancashire. Whereas 60% or lower own their house in Blackpool, Preston, Burnley, and Blackburn.
- Across Lancashire a fifth of total households are privately renting. This is much higher in Blackpool at almost a third of total households. The proportion of private rented houses is also higher in Burnley, Hyndburn, Lancaster, and Preston.
- The proportion of households which are socially rented from council or local authority is relatively low across Lancashire particularly in Chorley, Fylde, Ribble Valley, South Ribble, and Wyre.



Housing tenure – 2UA

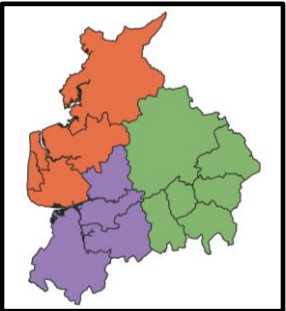


- Around two thirds of households own their home either outright or with a mortgage in both UAs.
- More households in the North privately rent their homes than in the South, largely driven by higher rates of private renting in Blackpool, as well as Lancaster and Preston.
- The proportion of homes which are socially rented is higher in South at 14% compared to 11% in North.

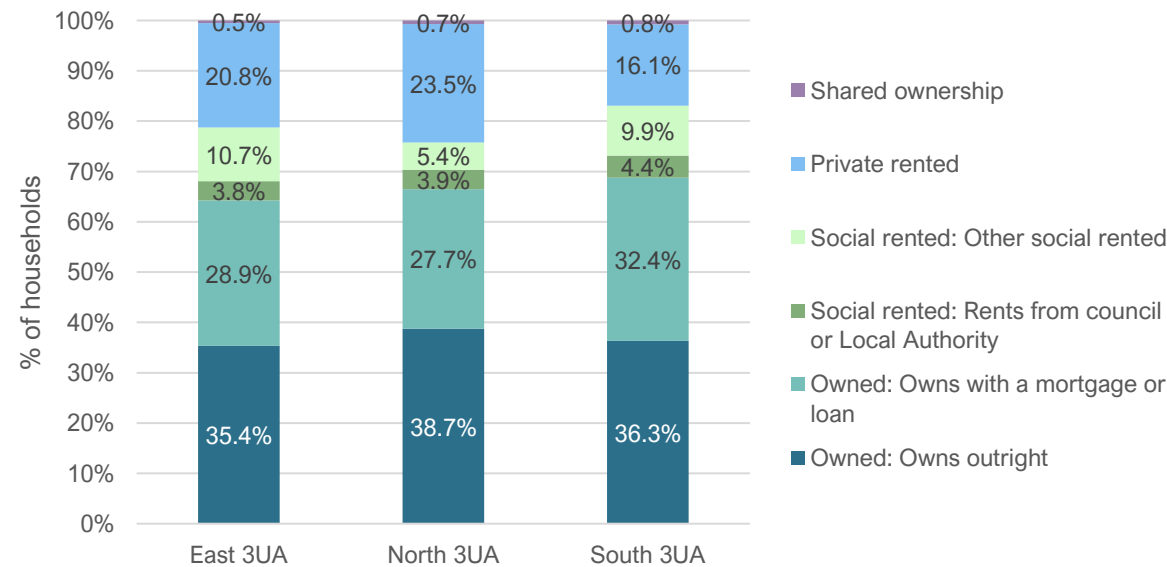


Source: ONS Census 2021

Housing tenure – 3UA



Housing tenure (3UA) (2021)

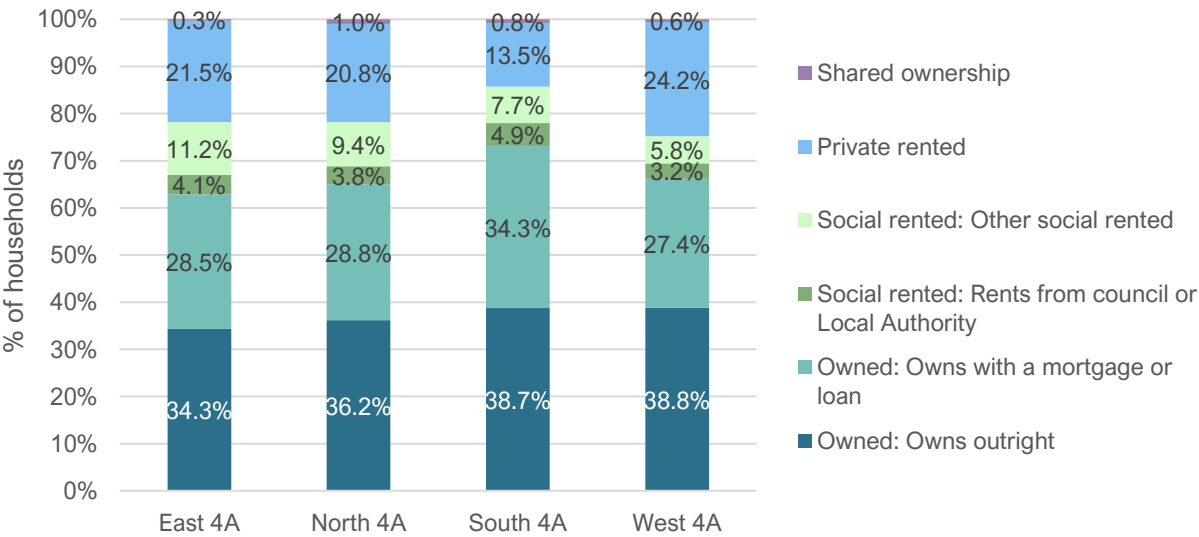


- Over two thirds of households (69%) own their house outright or with a mortgage in South, slightly above 66.5% in North, and 64% in East.
- The proportion of homes which are privately rented is higher in North particularly driven by higher rates of private renting in Blackpool, and the East UA where over a fifth of households privately rent their home. Levels of renting are lower in the South with more people owning their home.
- The proportion of homes which are socially rented is higher in East and South at 14% compared to 9% in the North.

Housing tenure – 4UA



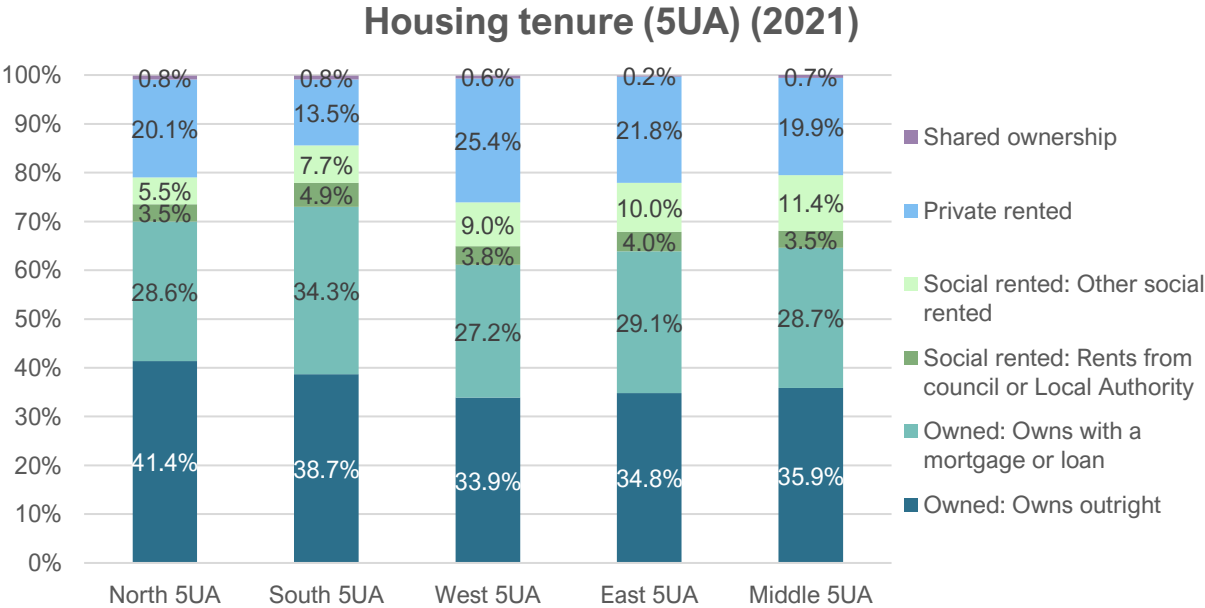
Housing tenure (4UA) (2021)



- Levels of home ownership are higher in the South with 73% of households either owning their home outright or with a mortgage. In the West 66% own their home, 65% in North and 63% in the East.
- The proportion of households are privately renting are therefore higher particularly in the West at almost a quarter of households, followed by just over a fifth of households in the East and North UAs.
- The proportion of homes which are socially rented is higher in East at 15%. Levels in North and South are around 13% and lower in West at around 9% of households.

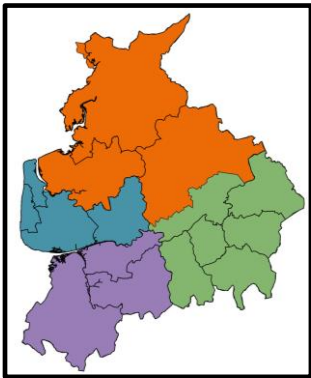
Source: ONS Census 2021

Housing tenure – 5UA

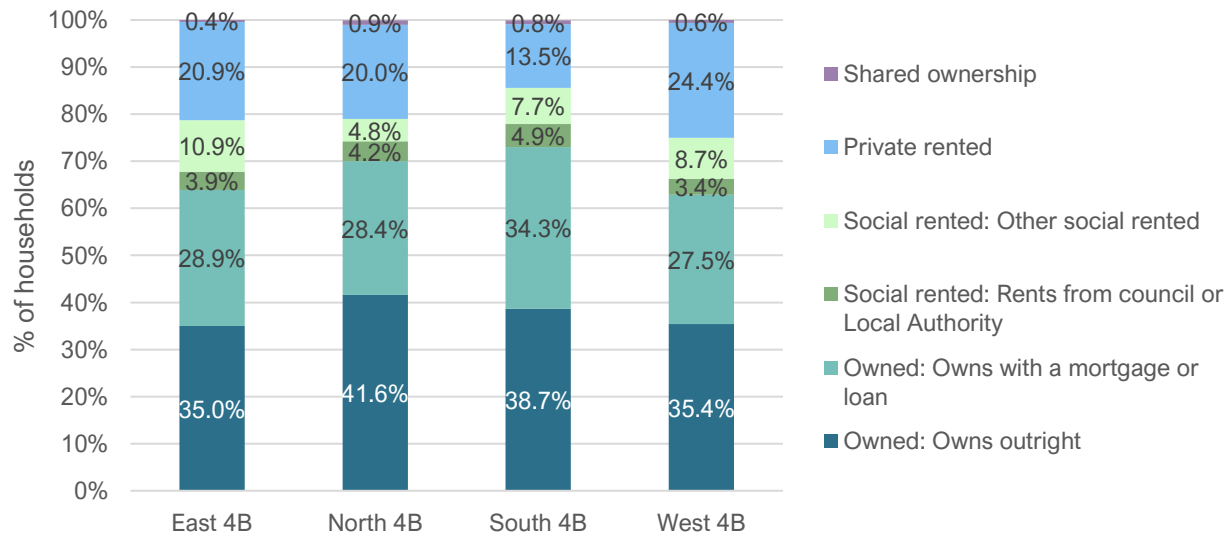


- Levels of home ownership are considerably higher in South and North at 73% and 70%. Middle and East home ownership is 64-65% but lower in West at 61%.
- West has the highest level of private renting at over a quarter of households followed by 22% in East and around a fifth of households in both North and Middle UAs. Levels of private renting are lower in South where almost three quarters own their own home.
- Levels of social renting are highest in Middle and East at between 14-15% of households, followed by 13% in West and South. North has the lowest levels of social renting of 9% of total households.

Housing tenure – 4UA B



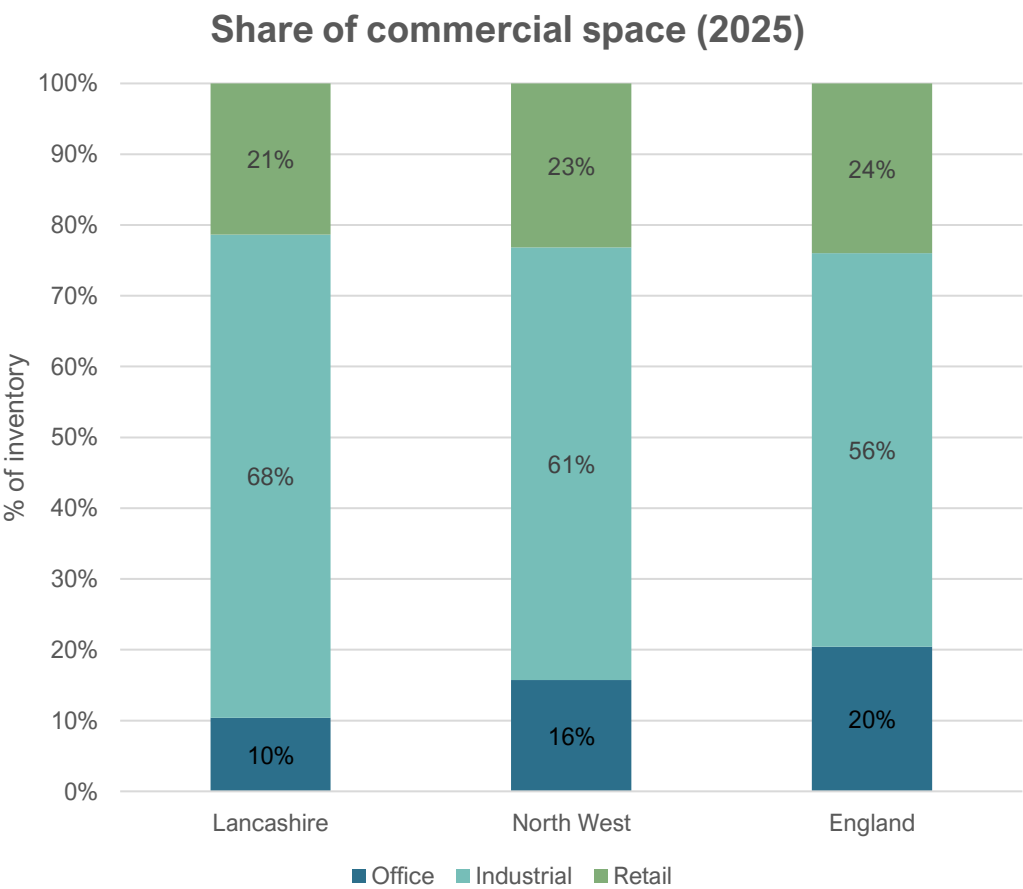
Housing tenure (4UA B) (2021)



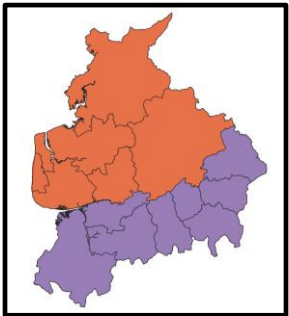
- South and North UAs have the highest levels of people who either own their home outright or with a mortgage of 73% and 70% of households respectively. Home ownership is lower in West and East between 63-64% of households.
- The proportion of households which are privately renting is highest in the West at almost a quarter of households largely driven by high rates of private renting in Blackpool, followed by around a fifth of households in East and North UAs. South has the lowest level of private renting with almost three quarters of households renting their own home.
- East has the highest level of social rented at 15% of households, followed by between 12-13% of South and West. Levels are lowest in North at 9% of households.

Inventory (sq. ft)

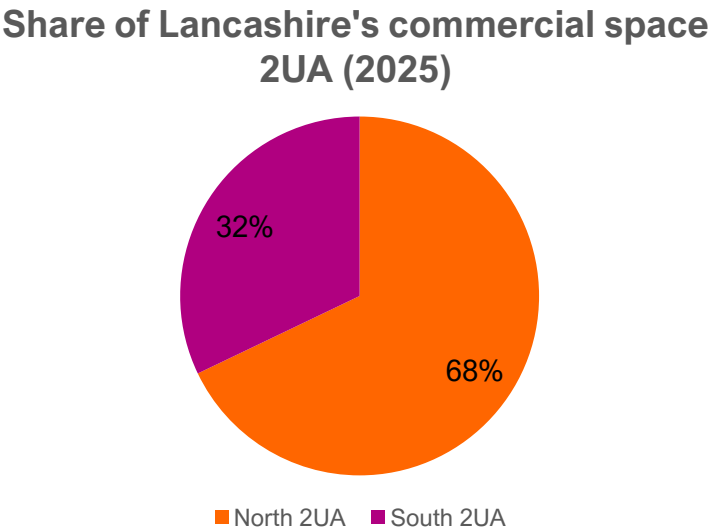
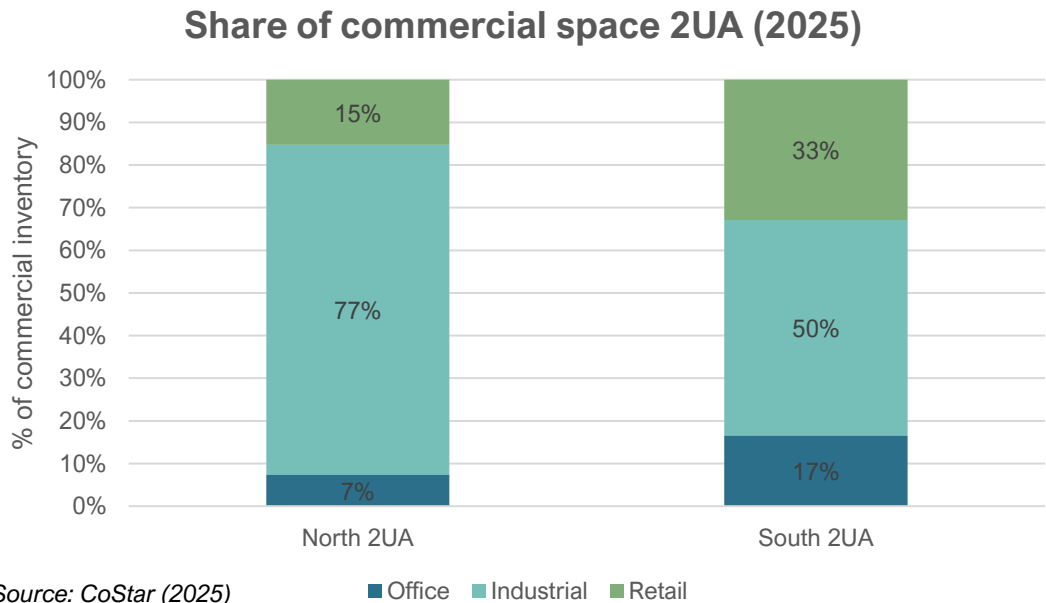
- A total of 170 million sq.ft of commercial inventory in Lancashire, a 0.6% annual rise over the last decade.
 - There is slightly less office space in 2025 than there was a decade ago – 17.81m in 2015 and 17.72 in 2025.
 - There has been a 0.7% annual rise in industrial space – 108.84m in 2015 and 116.18m in 2025.
 - There has also been a 0.6% annual rise in retail space from 34.36m in 2015 to 36.34m in 2025.
- Industrial space makes up two thirds of commercial inventory in Lancashire, above shares regionally and nationally – this is a reflection of the importance of manufacturing to the local economy.
- Only a tenth of commercial space in Lancashire is office space, below regional and particularly national shares, where a fifth of commercial space is office space.
- 2m sq.ft of commercial space delivered over the last year, 1.8m of which has been industrial space.



Inventory – 2UA

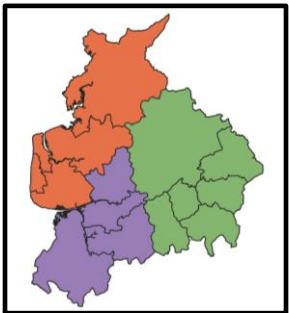


- Over three quarters of industrial space is industrial in North – office and retail space lower shares than regionally and nationally.
- More of a spread in South – share of office space in line with regional average. A high share of retail space, which makes up a third of total commercial space.
- North makes up two thirds of total commercial space under the 2UA option.
- Fairly even split in terms of additional commercial space construction constructed over the last year (South 53% and North 47%). Majority of 2m sq.ft of space constructed across both UAs has been industrial space.

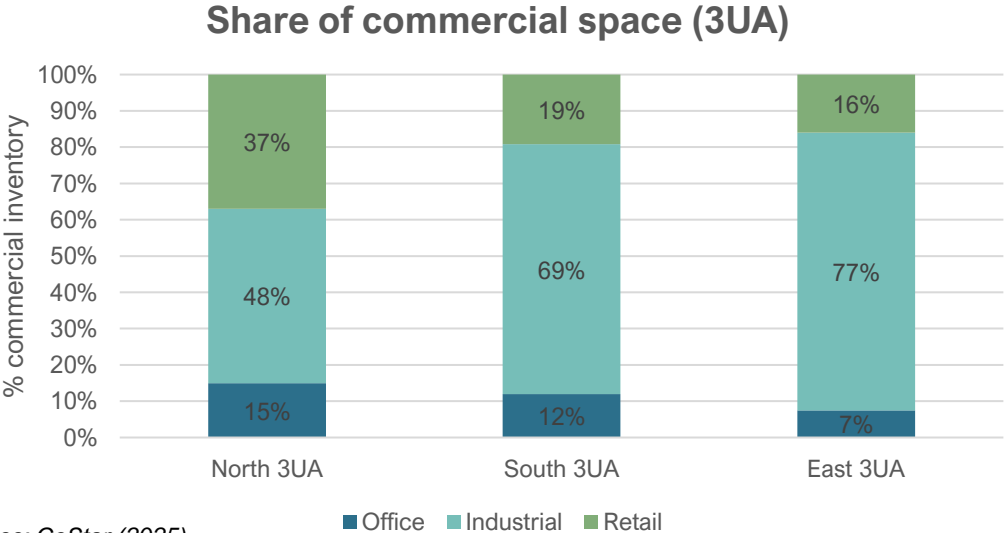


Source: CoStar (2025)

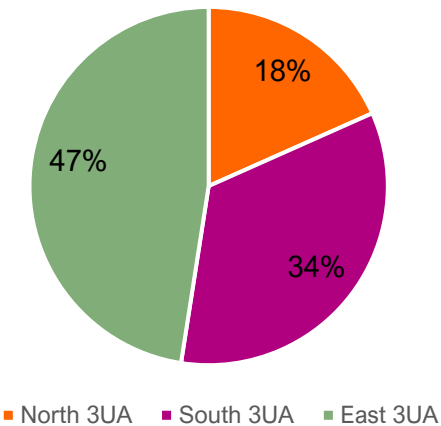
Inventory – 3UA



- East three quarters of commercial space is industrial, a reflection of strengths in manufacturing. Relatively low shares of retail and particularly office space.
- South also a high share of industrial space, lower share of office and retail space.
- North has lower share of industrial space, less than half of commercial space in North. Over a third of commercial space is retail.
- Almost half of commercial space is in the East, a third in South and just under a fifth in North. Around half of additional space constructed over the last year has been in South, 30% in East and 22% in North. Majority of 2m sq.ft of space constructed across both UAs has been industrial space.

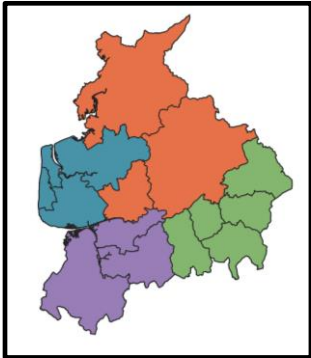


Share of Lancashire's commercial space 3UA (2025)



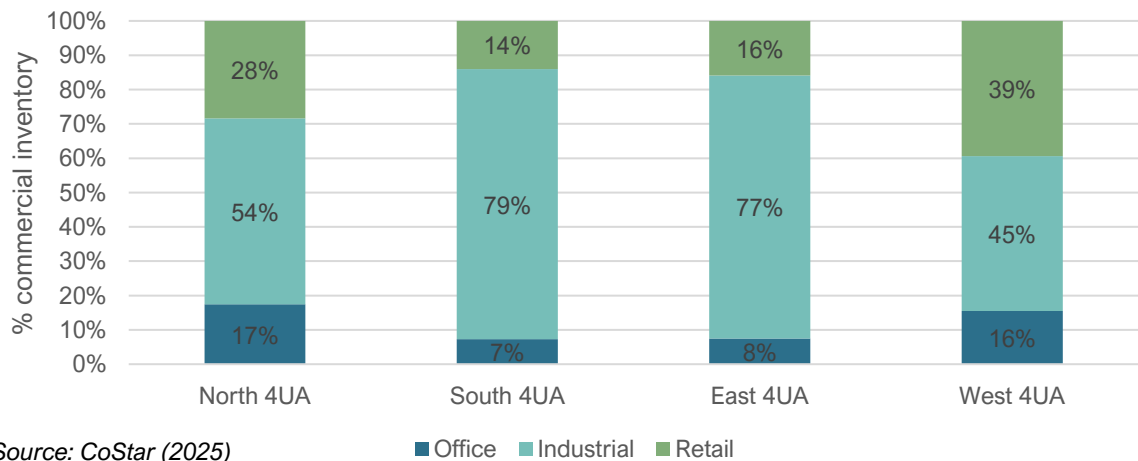
Source: CoStar (2025)

Inventory – 4UA

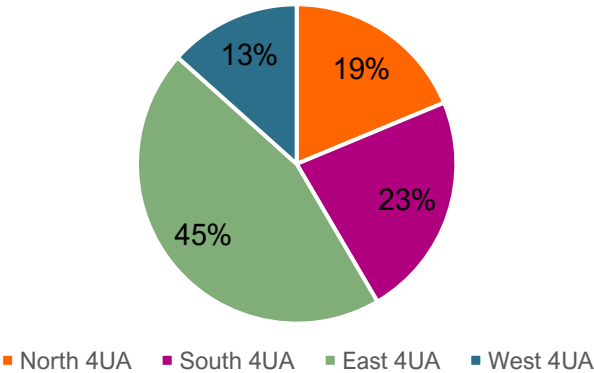


- South and East have high shares of industrial space, more than three quarters of total commercial space. Both South and East UAs less than a tenth of commercial space is office space.
- Lower share of industrial space in South and North UAs, both with high shares of retail space particularly West UA at almost 40% of total commercial space.
- East makes up nearly a half of total commercial space, South around a quarter of commercial space. North and particularly West lower shares of commercial space.
- Just over half of space constructed over the last year has been in North and an additional quarter in East. Only 1% of space has been constructed in the West. Across all 4UAs, majority of 2m sq.ft of space constructed has been industrial space.

Share of commercial space 4UA (2025)



Share of Lancashire's commercial space 4UA (2025)



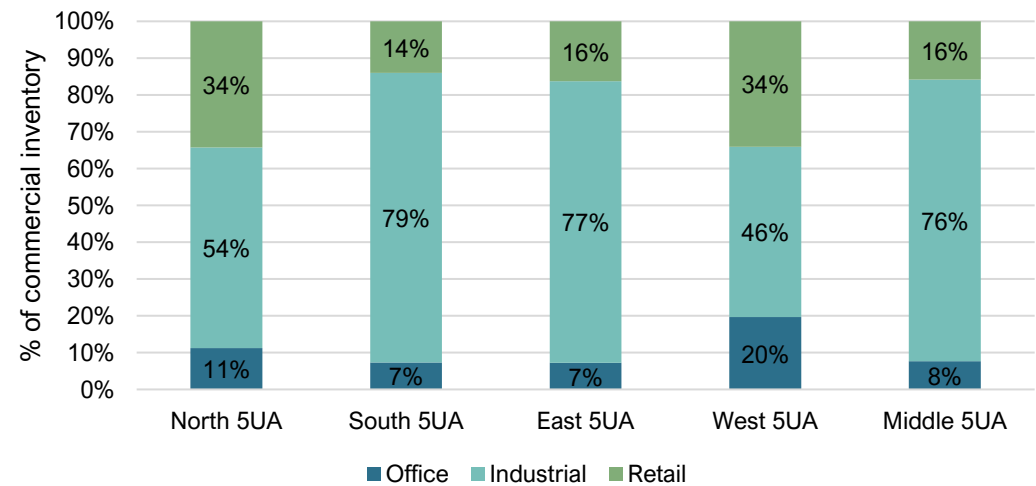
Source: CoStar (2025)

Inventory – 5UA

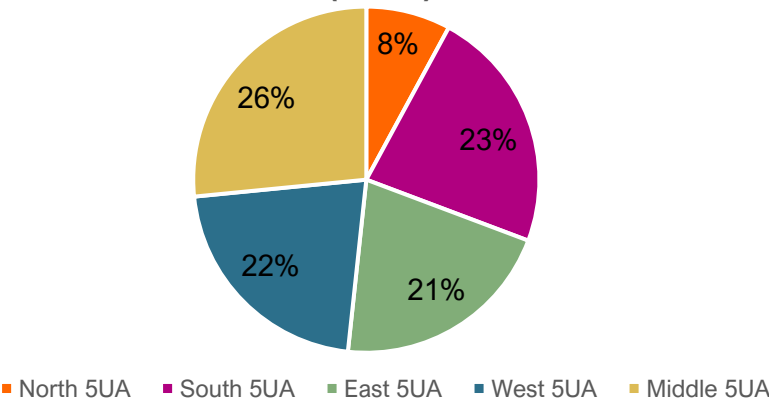


- South, East, and Middle UAs at least three quarters of commercial space is industrial, all with low shares of office space.
- West and North have lower shares of industrial space, both UAs around a third of total commercial space is retail.
- West has the highest share of office space.
- Fairly equal shares of commercial space in four of the five UAs (Middle, North, West, and East) make up at least a fifth of commercial space. North makes up by far the lowest amount of commercial space in the 5UA option.
- West has the highest share of space constructed over the last year at 30%, followed by around a fifth in North and South UAs, 16% in East, and 13% in Middle. Majority of space constructed across UAs has been industrial space.

Share of commercial space 5UA (2025)



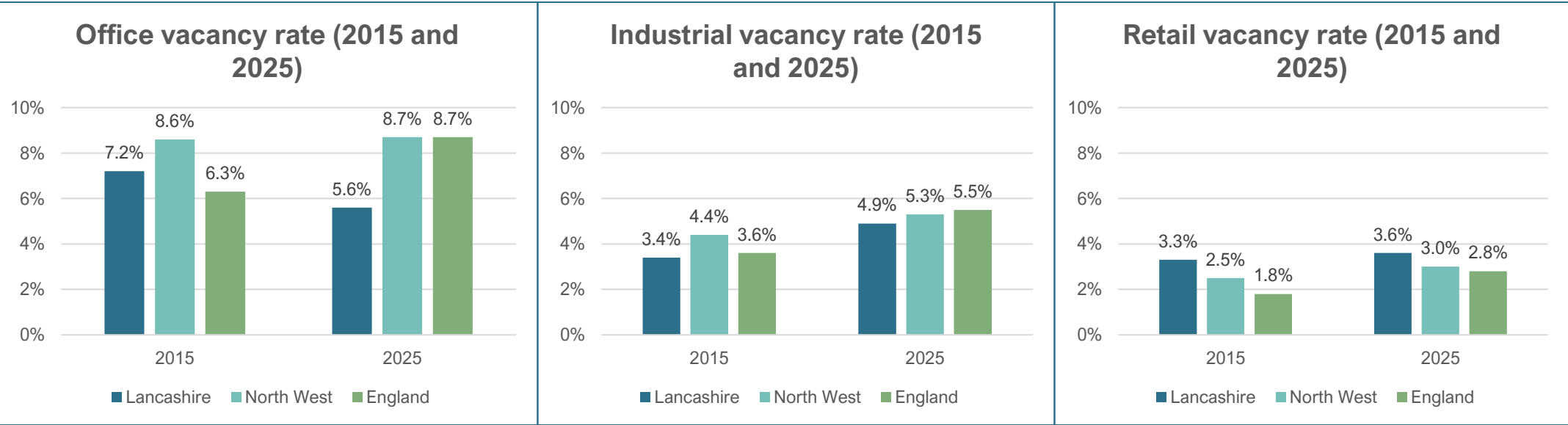
Share of Lancashire's commercial space 5UA (2025)



Source: CoStar (2025)

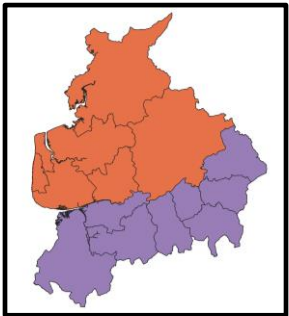
Commercial vacancy rates

- Office commercial rates have fallen in Lancashire over the last decade and are relatively low compared to regionally and nationally – this is at least a reflection of relatively low amounts of office space in Lancashire compared to the North West and national averages.
- Industrial vacancy rates have risen and are roughly in line with regionally and nationally at 5%. Perhaps an indication of reduced demand for industrial space in Lancashire and more generally nationally.
- Retail vacancy rates have not changed significantly since 2015 in Lancashire, although are slightly above regional and national averages, perhaps an indication that demand for retail space is slightly lower but retail vacancy rates do not vary wildly with regionally or nationally.

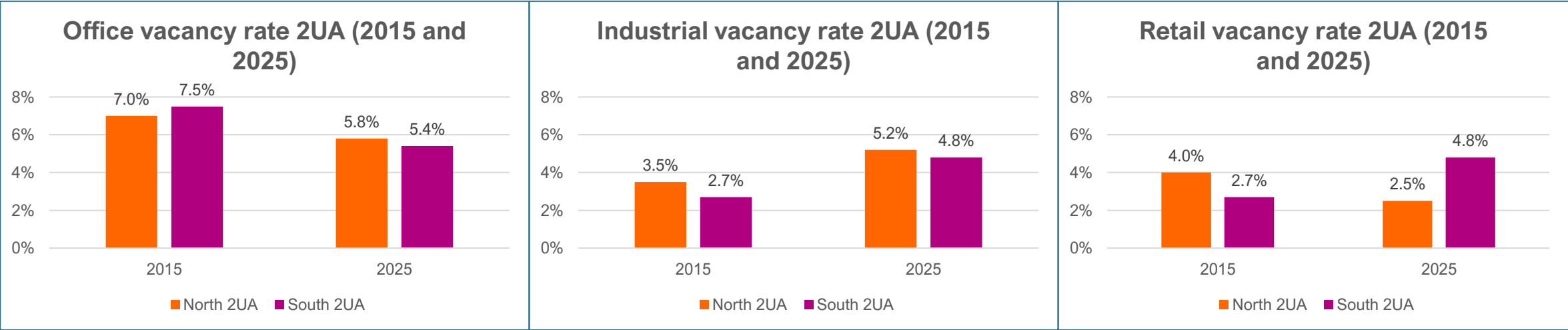


Source: CoStar (2025)

Vacancy rates – 2UA

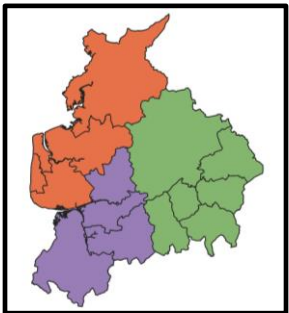


- North makes up 68% of total commercial space (76% of industrial space), even split of office and retail space.
- North has a higher vacancy rate for office and industrial space, but a lower vacancy rate for retail space than compared to South.
- **Office:** vacancy rates fallen for both UAs to similar levels, but are highest across commercial property, although well below regional and national rates.
- **Industrial:** North has seen a sharper rise in vacancy rates but both around 5%.
- **Retail:** the largest variance between authorities. North has seen a fall in vacancy rate whereas South an almost doubling in rate.

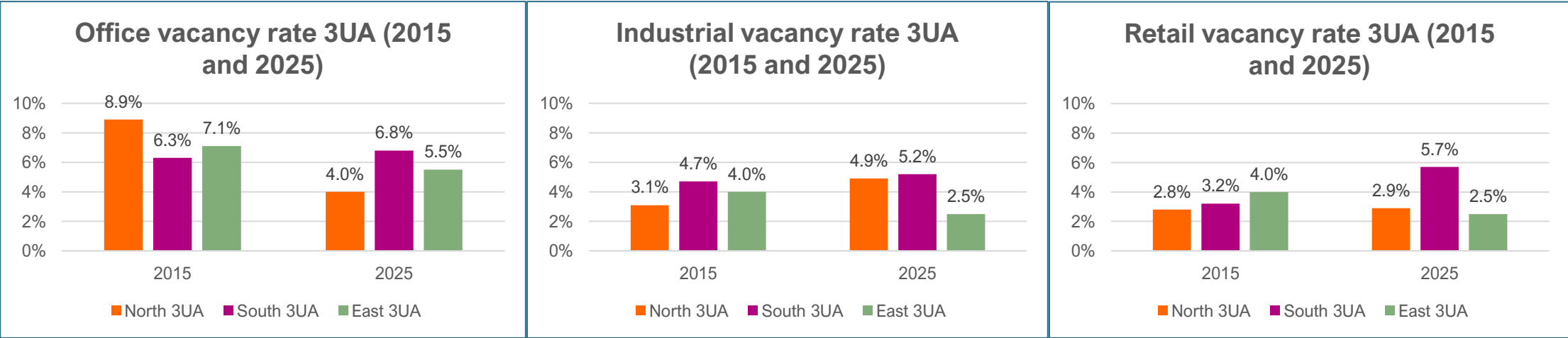


Source: CoStar (2025)

Vacancy rates – 3UA



- East makes up 47% of total industrial space, 34% in South, and 18% in North. East makes up 53% of industrial space East. South and East make up around a third of office space. Retail a relatively even split.
- **Office:** North has seen vacancy rate halve, East has also seen a decline. Not much change in South which continues to have the highest vacancy rate for office space.
- **Industrial:** North has seen the sharpest rise in vacancy rate to 5% and is roughly in line with rates in the South. East has seen a decline, indicating strong demand for industrial space – the vacancy rate for industrial space in the East is around half the levels in other UAs.
- **Retail:** East has seen a decline in retail vacancy rate and is just below vacancy rate in North which has shown little change. South has seen a rise – vacancy rate is around double both East and North UAs.

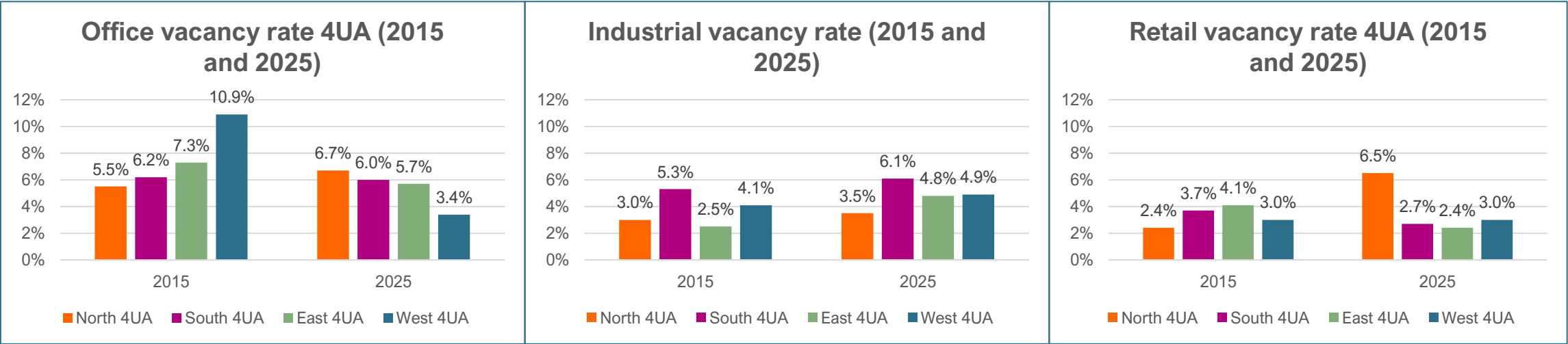


Source: CoStar (2025)

Vacancy rates – 4UA



- East makes up 45% of total commercial space (50% of industrial space). East, North and South make-up between 25%-33% of retail space, and North and East each make up around a third of office space.
- **Office:** West has seen a sharp decline in vacancy rate from having the highest a decade ago to having the lowest in 2025 by some margin. East has also seen a decline to just below 6%. North has seen a rise to just below 7%, and South has shown little change at around 6%.
- **Industrial:** South continues to have the highest vacancy rate. East has seen a sharp rise to around 5%, similar levels seen in the West. North has the lowest vacancy rate.
- **Retail:** North has seen a sharp rise to 6.5%, over double the vacancy rate of other UAs. East and South have seen declines to below 3% with West showing no change at 3%.

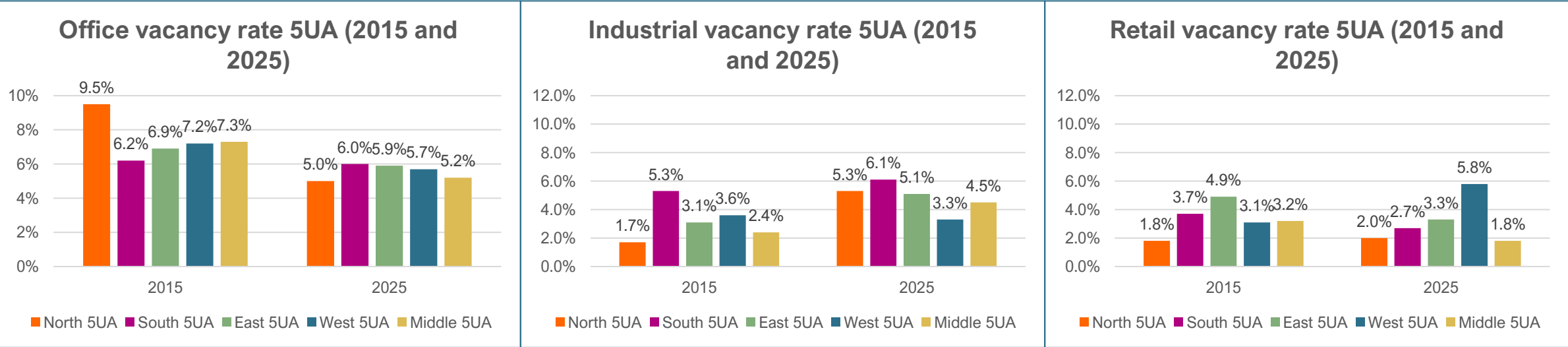


Source: CoStar (2025)

Vacancy rates – 5UA



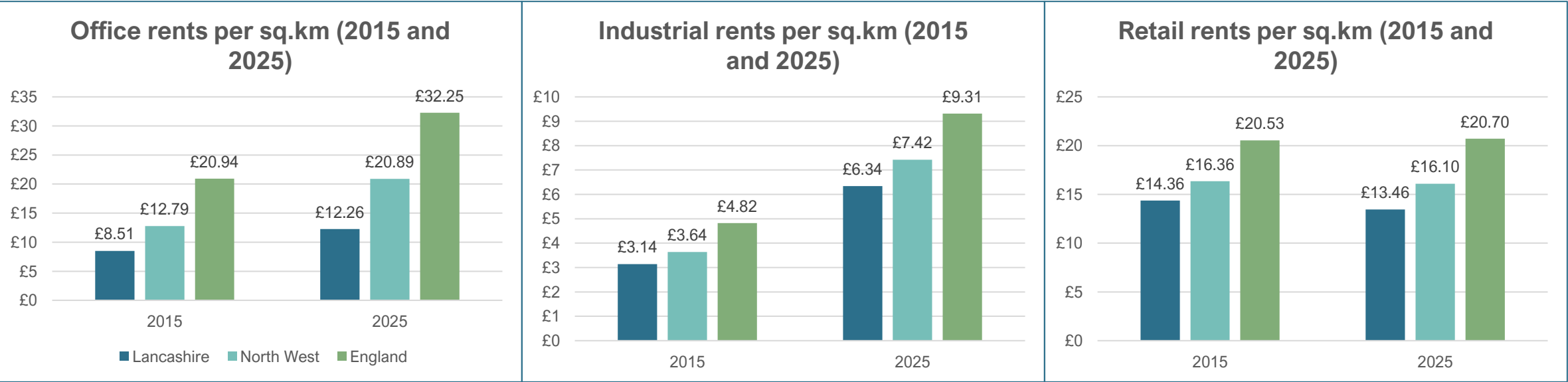
- Middle, South, West and East make up between 21%-26% of total commercial space. Middle, South, and East make up between 23-31% of industrial space, West and Middle combined just over half of retail space, and West 41% of office space.
- **Office:** all UAs have seen a decline with the North and Middle UAs seeing the sharpest decline to 5% but all UAs at a similar vacancy rate of between 5-6%.
- **Industrial:** except for the West UA, there has been a rise in industrial vacancy rates. Although South continues to have the highest vacancy rate, North has seen the sharpest rise. West has seen a slight decline and has the lowest vacancy rate.
- **Retail:** North and Middle lowest rates at around 2%, following a decline in vacancies in Middle. South and East around 3% with East seeing the largest decline in vacancy rate. West has seen the sharpest rise and has the highest vacancy rate at almost double any other UA.



Source: CoStar (2025)

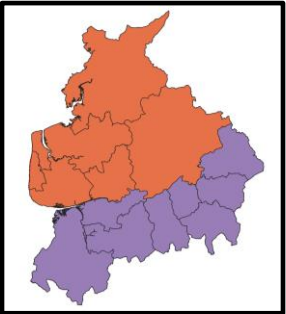
Commercial rental values (per sq.km)

- Across commercial property types, Lancashire has relatively low rental values per sq.km than compared to the North West average and nationally. The national average will be skewed particularly for office space by major cities including London, so we will focus more on the North West average as a comparator.
- For office space, rental values in Lancashire are 40% below the North West average, by far the most across commercial property types.
- Industrial and retail property values are more in line with the regional average but remain between 15-16% below the North West average.

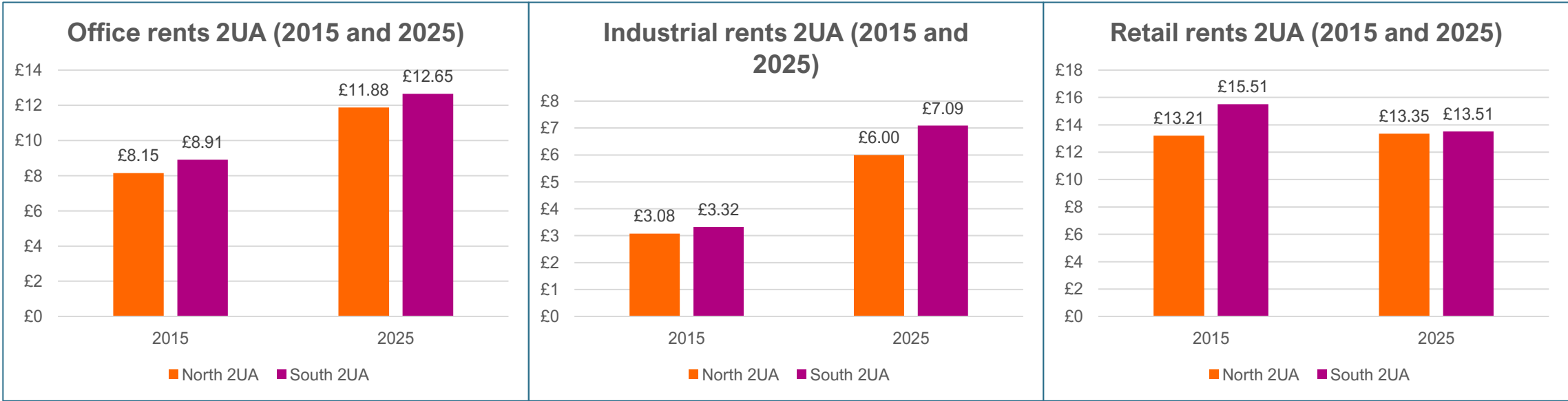


Source: CoStar (2025)

Commercial rents – 2UA

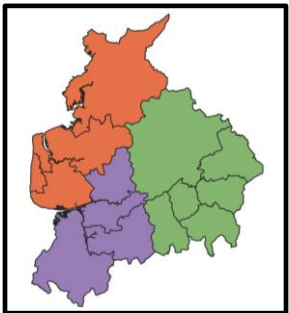


- Rental values across commercial property types higher in the South, widening for industrial which has risen by 8% a year between 2015 and 2025 compared to 7% in North. Rental values in South are within 5% of North West average.
- Both have seen rises in office rental values of around 4% a year.
- Rental values have fallen by 0.6% a year in South to a point which is similar to North UA.

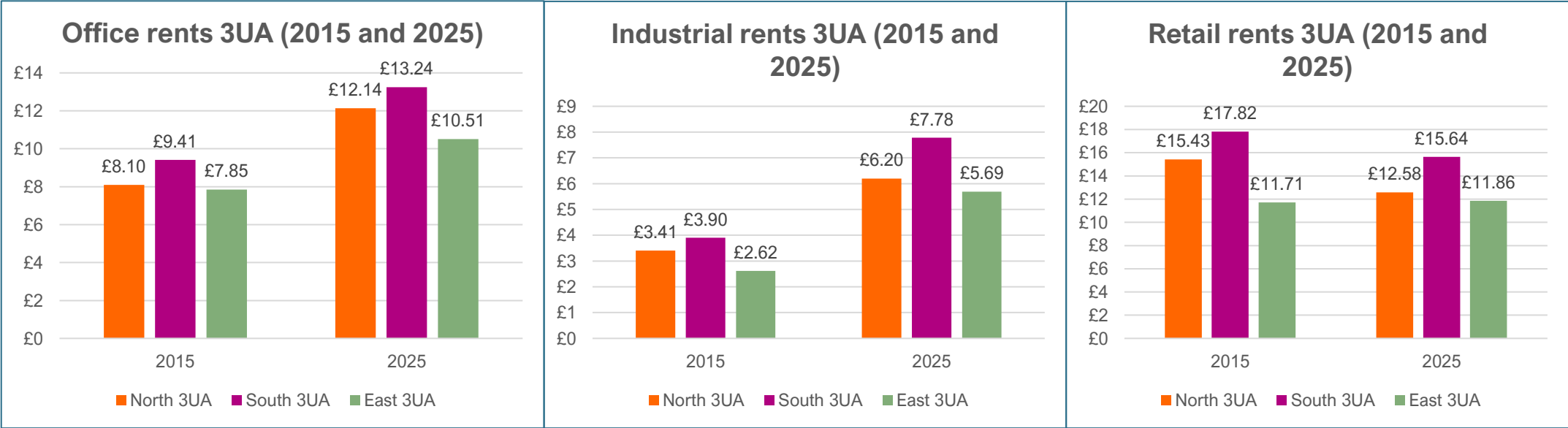


Source: CoStar (2025)

Commercial rents – 3UA



- South has highest rents across commercial property types although North has seen the sharpest rise in office rental values of 4% a year between 2015 and 2025.
- East has seen the sharpest rise in industrial rental values of 8% a year although remain the lowest rents across the 3UAs. South has seen a rise in industrial rents of 7% a year and are 5% above the North West average. North has seen a 6% rise in industrial rents.
- South and North have seen at least 1% annual falls in retail rents, although retail rents remain within 5% of the North West average in the South. East has seen a slight rise in rental values.
- Across commercial property East has the lowest rental values.

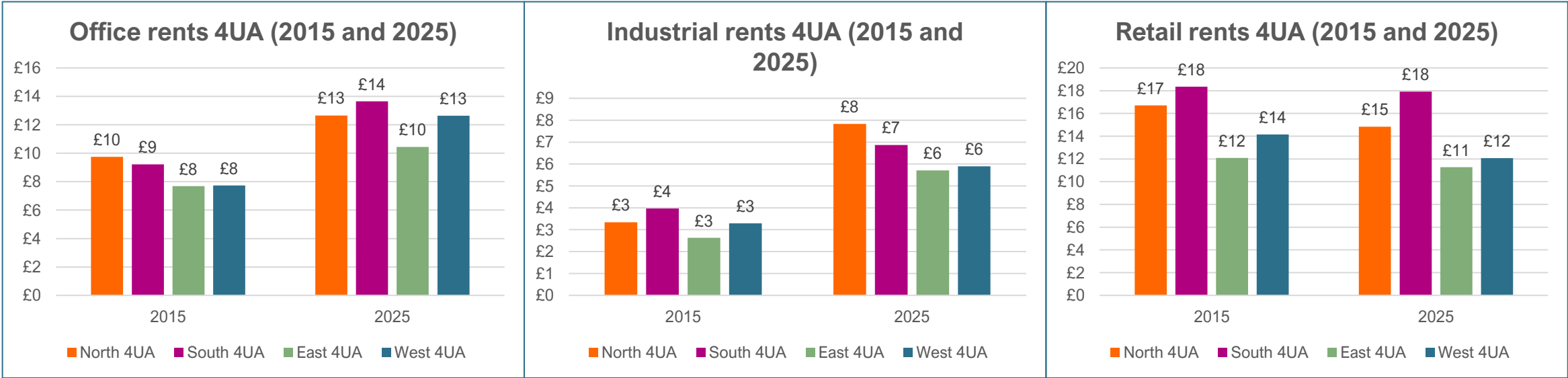


Source: CoStar (2025)

Commercial rents – 4UA



- West has seen the biggest rise in office rents of 5% a year between 2015 and 2025 although the highest office rental values are in South. East has the lowest rental values by some margin.
- North has seen the largest rise in industrial rents of 9% a year, with industrial rental values 6% above the regional average. East has also seen significant rise in rental values of 8% a year but continues to have the lowest industrial rents of the 4UAs.
- South has the highest retail rental values which are 11% above the regional average. North, West, and East UAs have all seen declines in retail rental values. East continues to have the lowest retail rental values.

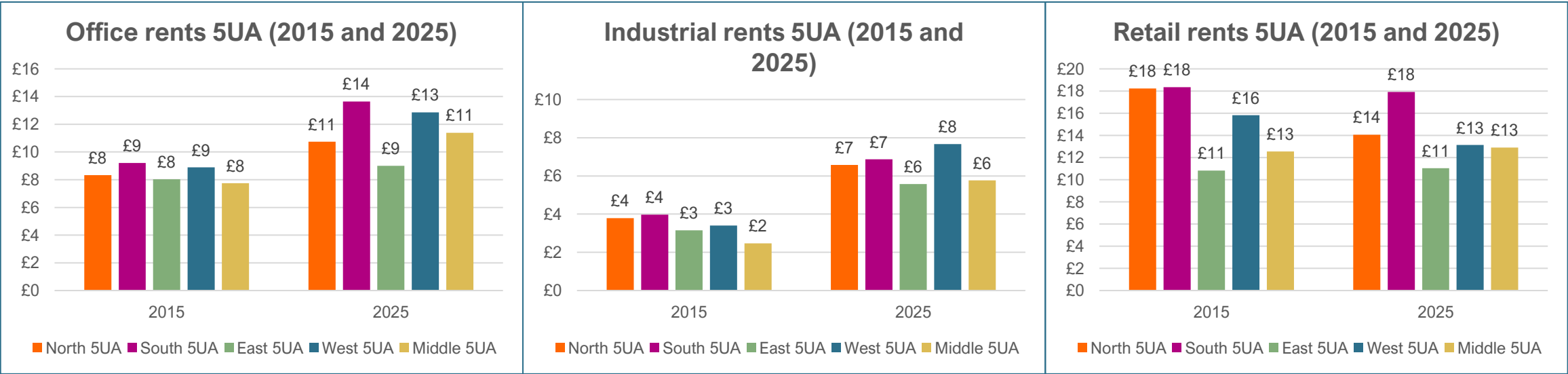


Source: CoStar (2025)

Commercial rents – 5UA



- South has highest rental values for office and retail space, West the highest for industrial space.
- South, West, and Middle have seen fastest rise in office rental values of 4% a year between 2015 and 2025, with South and West having the highest rents. East has seen the lowest rises in office rents of 1% a year and has the lowest rental values.
- Middle and West have seen the fastest rise in industrial rental values of 8.5%-9.0%, with West having the highest rental values which are 3% above the regional average. East, South, and North have seen annual rises of around 6%, with East having the lowest rental values.
- South has the highest rental values which are 11% above the regional average. North has seen a sharp fall of 2.5% a year in retail rental values which are in line with values seen in West which has also seen 25 annual falls, and Middle UAs. East UA has seen little change and continues to have the lowest retail rental values.



Source: CoStar (2025)

Annex – data sources

Indicators	Dataset for 2,3,4,5UA	Dataset for 4B option
Population	• Latest district level data for 2024 – <i>ONS Population estimates - local authority based by single year of age</i> • Population density available for 2024 from <i>ONS Population estimates for the UK, England, Wales, Scotland and Northern Ireland: mid-2024, ONS</i> • Population projections use data <i>LG Inform Plus data via the Lancashire LGR Data Working group</i>	• Latest ward level data for 2022 from <i>ONS Ward-level population estimates</i> • Latest population density available for 2022 from <i>ONS Lower layer Super Output Area population density</i> • Data draws on <i>LG Inform Plus data via the Lancashire LGR Data working group. Proportions North and South Ribble Valley make up of the population aged 0-17, 18-64 and aged over 65 in 2022 are taken and then multiplied by population projections for each age category for Ribble Valley to calculate projections for North and South Ribble Valley, which are then added to their respective UAs. The same process was followed for Wyre.</i>
Economy - GVA	• Latest district level data district for 2023 from <i>ONS Regional gross value added (balanced) by industry: local authorities by ITL 1 region</i> • These are in Chained Volume Measures in 2022 money value so therefore are adjusted to remove the effect of inflation	• GVA by small area available between 1998 and 2023 from <i>ONS UK small area gross value added (GVA) estimates</i> • GVA by small area estimates are only available using current prices and therefore does not adjust for the effects of inflation so figures are not directly comparable to other options
Deprivation: household census deprivation and Index of Multiple Deprivation (IMD)	Both use ONS Census 2021 data for household deprivation and 2019 MHCLG English indices of deprivation. This includes skills deprivation which uses 2019 MHCLG English indices of deprivation	
Jobs	• Latest district level data available for 2023 from <i>ONS Jobs Density</i> for total jobs and jobs density	• Jobs data unavailable below LA level • Total employment estimates have been used as a proxy from <i>ONS Business Register and Employment Survey</i> • Employment per working age resident using ONS BRES employment estimates and ONS ward level population estimates to proxy for number of jobs available per working age resident

Indicators	Dataset for 2,3,4,5UA	Dataset for 4B option
Unemployment	Latest district level data district for 2024/25 from <i>ONS Model-based estimates of unemployment, Annual Population Survey</i>	Estimates are unavailable below district level therefore we have proxied unemployment by taking the proportion of working age population made up in North Ribble Valley and South Ribble Valley of Ribble Valley; and of Urban and Rural Wyre of Wyre. Then we have used these approximations to estimate total count of those who are unemployed (model based) and the total economically active population, and then divided the count of unemployed by the economically active population across each UA.
Economic activity	Latest district level data district for 2024/25 from <i>ONS Annual Population Survey</i>	Estimates are unavailable below district level therefore we have approximated economic activity rates by taking the proportion of working age population made up in North Ribble Valley and South Ribble Valley of Ribble Valley; and of Urban and Rural Wyre of Wyre. Then we have used these approximations to estimate total count of those who are economically active and the total working age population, and have then divided the count of those who are economically active by the working age population across each UA.
Earnings	Latest district level data for 2024 – <i>ONS Annual Survey of Hours and Earnings</i>	<i>Earnings data are unavailable below district level.</i> To calculate estimates for earnings we have taken the proportion of population made up by each district/area of the UA it is in and then multiplied this by district earnings to get an estimate for each of the UAs
Business	- Latest district level data available for 2025 from <i>ONS Business Counts</i> to calculate total businesses, size and concentration. - Business demography data available from <i>ONS Business Demography</i> up to 2023.	- Business data available at MSOA level currently available up to 2024 from <i>ONS Business Counts</i> - Business demography estimates are unavailable below LA level. To calculate estimates for the 4B option, we have used proportions of total businesses made up in North and South Ribble Valley and Urban and Rural Wyre in Ribble Valley and Wyre respectively to calculate number of business births, business deaths, the number of businesses surviving their first 5 years of operation and high growth businesses across each UA

Indicators	Dataset for 2,3,4,5UA	Dataset for 4B option
Qualifications	Data on qualifications from <i>ONS Annual Population Survey</i> with latest data for 2024	ONS Annual Population Survey unavailable below district level so we have used the ONS Census to source qualifications attainment. Figures will vary to other options as 4B data refers to all residents aged over 16 whereas the data for other UA options considers qualifications held by the working age (16-64) population.
Health	- Life expectancy data from ONS Health State Life Expectancy, all ages, UK – latest district level estimates available for 2021-23 - Child obesity data from Office for Health Improvement & Disparities <i>Year 6 prevalence of obesity (including severe obesity – latest estimates between 2023/24</i> <i>Adult obesity data from Office for Health Improvement & Disparities Overweight (including obesity) prevalence in adults – district level estimates reported for 2023/24</i> <i>Levels of physical activity data from Sport England Active Lives Adult Survey for 2023/24</i>	- All sources are the same but with some minor differences in time period covered: - Life expectancy data from ONS Health State Life Expectancy, all ages, UK – latest MSOA level estimates available for 2019-23 - Latest MSOA data for child obesity is between 2021/22 and 2023/24 - Latest MSOA data for levels of physical activity are 2022/23
Housing	- House price data from <i>ONS Median house prices by Middle layer Super Output Area</i> - Housing affordability data from <i>ONS Housing affordability in England and Wales</i> - Housing delivery against LHN draws on new standard method published by MHCLG alongside average delivery between 2021/22 – 2023/24 - Housing tenure uses 2021 Census data - To proxy for housing quality we have reported on the proportion of non decent homes using <i>English Housing Survey: Local Authority Housing Stock Condition Modelling by MHCLG</i> with latest district level data for 2023	- House price data uses the same source - Housing affordability based on district data and has therefore not been reported other than at district level - To proxy for housing delivery we have taken the proportion of households in North and South Ribble Valley within Ribble Valley and multiplied this by LHN and delivery figures for Ribble Valley to get estimates for North and South Ribble Valley. The same process was followed to get LHN and delivery estimates for Rural and Urban Wyre. These estimates were then summed with the remaining 12 districts to get UA estimates. - Housing tenure uses the same source - The lowest level of geography for estimates for non-decent homes is at a district level. To proxy we have taken the proportions North and South Ribble Valley make up by tenure within Ribble Valley and multiplied these by the number of non-decent properties in Ribble Valley, which have then been summed to the UAs they are located in option 4UA B The same process was followed for Rural and Urban Wyre.

Indicators	Dataset for 2,3,4,5UA	Dataset for 4B option
Economic geography	- Information on economic corridors, share of trips and towns classifications is from the 2021 <i>Lancashire Independent Economic Review</i> - Population and housing clusters draw on <i>ONS Census data</i>	
Sectors	- Employment estimates use <i>ONS Business Register and Employment Survey</i> – latest estimates for 2023 - Business estimates use <i>ONS Business Counts</i> – latest estimates for 2024 - GVA estimates use <i>ONS : Regional gross value added (balanced) by industry</i> – latest estimates for 2023	- Employment and business estimates use the same sources - District level is the lowest geography available for GVA estimates by sector. To calculate estimates for option 4B, we have taken the proportion North and South Ribble Valley, and then multiplied sector estimates in Ribble Valley by respective proportions in North and South Ribble Valley to get sub district estimates. The same process was followed for Rural and Urban Wyre to help construct UA estimates.
Occupations	Occupation estimates use <i>ONS Annual Population Survey</i> – latest data for 2024	<i>ONS Annual Population Survey (APS) unavailable below LA level so we have used the ONS Census to source information on the occupations residents are employed in by UA. Figures will vary as census occupation data refers to all residents aged over 16 whereas the data for other UA options considers employment by occupation from the ONS APS held by the working age (16-64) population.</i>
NEET and further education and skills	- NEET data from <i>DfE Participation in education, training and NEET aged 16 to 17 by local authority and Young people Not in Education, Employment or Training Lancashire County Council</i> - Further education and skills achievements data from DfE	<i>NEET data unavailable below LA level so we have used the proportion of 16-17 year olds in North and South Ribble Valley, and multiplied this by the number of 16-17 year olds who are NEET in Ribble Valley, and summed these to their respective UAs. The same process was followed for Rural and Urban Wyre to get UA estimates</i> <i>FE achievements data unavailable below LA level so we have used the proportion of the working age population in North and South Ribble Valley, and multiplied this by the number of FE achievements in Ribble Valley, and summed these to their respective UAs. The same process was followed for Rural and Urban Wyre to get UA estimates.</i>

Ward classifications for 4UA Blackpool

Urban Wyre	Rural Wyre	North Ribble Valley	South Ribble Valley
Bourne	Brock with Catterall	Alston & Hothersall	Billington & Langho
Breck	Calder	Bowland	Brockhall and Dinckley
Carleton	Garstang	Chipping	Chatburn
Cleveleys Park	Great Eccleston	Derby & Thornley	Clayton le Dale and Salesbury
Hardhorn with High Cross	Hambleton and Stalmine	Dilworth	East Whalley, Reed and Simonstone
Jubilee	Pilling	Gisburn & Rimington	Edisford and Low Moor
Marsh Mill	Preesall	Hurst Green and Whitewell	Littlemoor
Mount	Wyresdale	Ribchester	Mellor
Park		West Bradford and Grindleton	Primrose
Pharos		Waddington, Bashall Eaves & Mitton	Sabden
Pheasant's Wood			Salthill
Rossall			St Mary's
Stanah			Whalley Nethertown
Tithebarn			Whalley and Painter Wood
Victoria & Norcross			Wilpshire and Ramsgreave
Warren			Wiswell and Barrow

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