

ST ANNE'S TOWN CENTRE STRATEGY & MASTERPLAN

Stage 1: Socio-Economic Context

02 February 2022



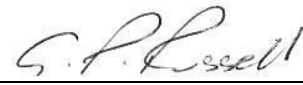
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Fylde Council

St Anne's Town Centre Strategy and Masterplan

Socio-economic Context

January 2022

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1 Introduction

This analysis has been prepared to inform the St Anne's masterplan being developed by BDP for Fylde Borough Council. Whilst not a core output of the commission, the information and analysis will be used to underpin the business cases which will subsequently be prepared for the Town Centre and Island site.

The report sets out an overview of key economic indicators to place the proposed masterplan interventions into context and provide an understanding of how they respond to the wider socio-economic conditions. The baseline analysis is focused on the Fylde Local Authority area, rather than St Annes itself, reflecting the availability of most standard datasets. The exception to this is deprivation data, which is available for smaller geographical areas. Lancashire, the North West and England are included as comparator areas.

The indicators included in the report have been grouped into the themes of People, Economy and Place, with coverage designed to avoid duplication of the analysis in the other Stage 1 reports (Town Centre Healthcheck Report; Visitor Economy Baseline Report; Town Centre Masterplan Options Report; Island Site Options Report):

- People:
 - population; demography; population change and projections;
 - health and life expectancy;
 - qualifications; education and skills deprivation
- Economy:
 - employment growth; by sector; part-time / full-time split;
 - business base; density and survival rates;
 - Gross Value Added;
 - economic activity and unemployment;
 - occupations and earnings
- Place:
 - property market
 - digital connectivity
 - deprivation
 - crime

2 People

Key Points

- The population of Fylde is just over 81,000, and has risen more rapidly over the past five years than in any of the comparator areas.
- The age profile of the Fylde population differs markedly from the comparator areas, with a smaller working age population and fewer young people. The share of the population which is over 65 is 1.5 times the national average.
- Population projections suggest that this pattern is likely to continue, with the population aged 65+ expected to grow faster in Fylde over the next 20 years than is the case in the comparator areas.
- The working age population in Fylde is well-qualified, with over 40% holding degree-level qualifications. However, some parts of St Annes suffer from relatively high levels of education, skills and training deprivation (as measured on the English Indices of Deprivation).

2.1 Population and demographics

2.1.1 Total population

In 2020, the total population of Fylde stood at 81,211 people, an increase of 4.8% since 2015. Over this period, the rate of growth in the population of Fylde has been higher than its comparator areas of Lancashire (3.2%), North West (2.7%), and England (3.2%) during the same period.

Table 2.1: Population, 2011-2021				
	Fylde	Lancashire	North West	England
2011	76,098	1,171,558	7,055,961	53,107,169
2012	76,073	1,175,370	7,084,470	53,493,729
2013	76,548	1,178,594	7,103,488	53,865,817
2014	77,140	1,182,605	7,133,026	54,316,618
2015	77,490	1,188,875	7,175,178	54,786,327
2016	78,153	1,195,418	7,223,961	55,268,067
2017	78,863	1,201,855	7,258,627	55,619,430
2018	79,770	1,210,053	7,292,093	55,977,178

2019	80,780	1,219,799	7,341,196	56,286,961
2020	81,211	1,227,076	7,367,456	56,550,138

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

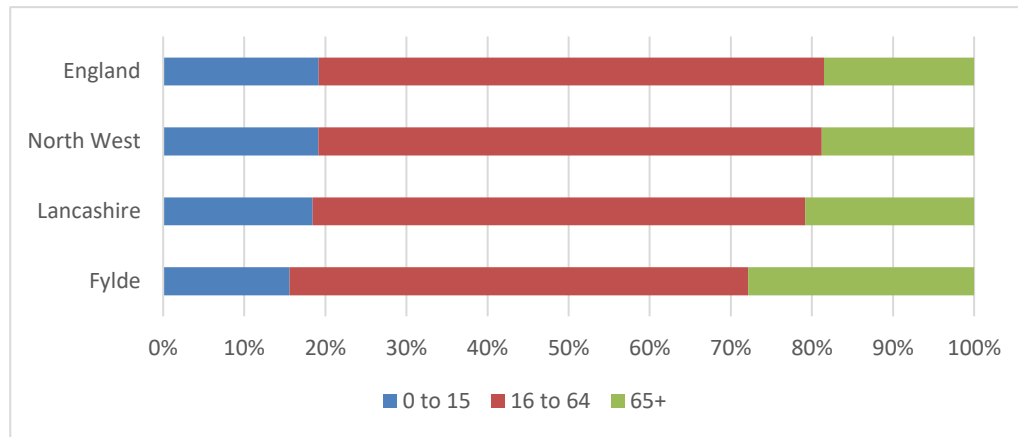
2.1.2 Population by age

In 2020, 56.6% of the Fylde population were of working age (16-64), while 60.7% of the population of Lancashire were estimated to be working age. The proportion of the population which is of working age in Fylde is lower than within Lancashire, North West (62.1%) and England (62.3%). Similarly, Fylde also has the smallest proportion of those aged 0 to 15 (15.6%), with a higher proportion of residents aged over 65. In Fylde, 27.9% of residents were aged 65 and over in 2020, compared to 20.8% in Lancashire, 18.8% in the North West and 18.5% nationally.

Table 2.2: Population by age, 2020				
	Fylde	Lancashire	North West	England
0-15	15.6%	18.4%	19.1%	19.2%
16-64	56.6%	60.7%	62.1%	62.3%
65+	27.9%	20.8%	18.8%	18.5%

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

Figure 2.1: Population proportion by age, 2020



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

2.1.3 Change in population

Between 2011 and 2020, Fylde experienced population growth of 6.7% which was above the growth rates in Lancashire, the North West and England. The population growth over this period has mainly been driven by an increasing ageing population with the number of people aged 65 and over increasing by 22.2% between 2011 and 2020. Whilst the comparator areas also saw an increase, this was less dramatic in Lancashire (20.1%), the North West (17.4%) and England

(19.9%). For all comparator areas, the increase in this demographic exceeded the increase in total population, highlighting the trend of an ageing population seen across all areas.

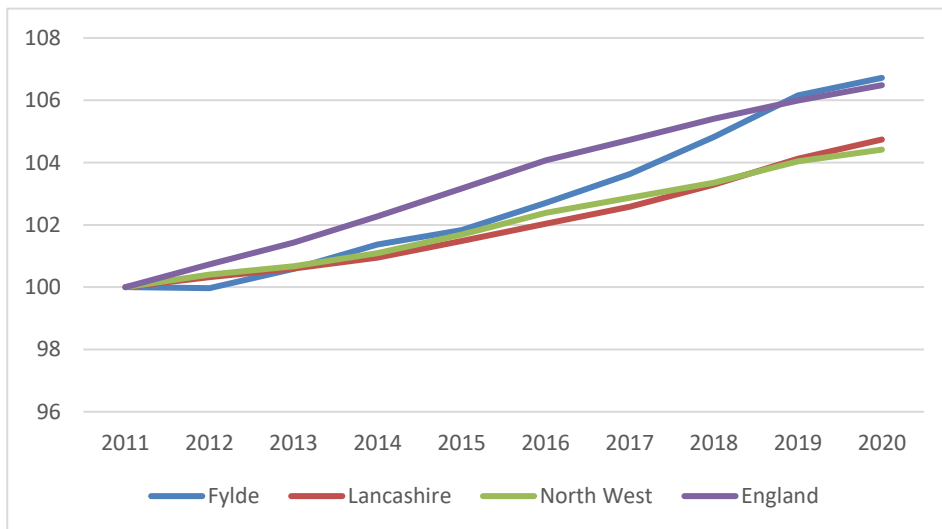
Fylde experienced the smallest growth in the number of residents aged 0 to 15 between 2011 and 2020 at 4.7%, compared to 5.7% in Lancashire, 6.5% in the North West and 8.2% nationally. Fylde's working age population grew by 0.9% between 2011 and 2020 which was below the national average (2.6%), but higher than the growth rate in Lancashire (0.1%) and North West (0.4%).

Table 2.3: Population growth (2011-2020)

	2011	2020	Change
Fylde	76,098	81,211	6.7%
Lancashire	1,171,558	1,227,076	4.7%
North West	7,055,961	7,367,456	4.4%
England	53,107,169	56,550,138	6.5%

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

Figure 2.2: Indexed population growth, 2011-2020 (2011=100)



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

2.1.4 Population projections

Population projections show that the population of Fylde is expected to continue to grow between 2021 and 2041. The total population of all ages is expected to increase from 82,1000 in 2021 to 91,807 in 2041, representing growth of 11.8%. Similarly, the populations of Lancashire, the North West and England are expected to increase over the period, although at a slower rate of 6.4%, 6.4% and 7.7% respectively.

Analysis of these projections by age range finds that in Fylde between 2021 and 2041, the largest population growth is expected to occur for the population aged 65 and over (+46.0%) whilst the population aged under 16 is expected to contract by 4.9% and the working age population is expected to contract by 0.7%. The growing ageing population is also projected for Lancashire (+33.6%), North West (+30.9%) and England (+36.9%) between 2021 and 2041, although the working age population is expected to grow in the North West (+1.5%) and England (+2.3%), in contrast to Fylde.

Table 2.4: Population projections (2021-2041)			
	2021	2041	Change
Fylde	82,110	91,807	11.8%
Lancashire	1,228,768	1,307,670	6.4%
North West	7,395,095	7,867,984	6.4%
England	56,989,572	61,353,966	7.7%

Source: ONS Population projections - local authority based by single year of age

2.1.5 Life expectancy

Life expectancy in Fylde is above the national average for males at 79.9 years (compared to 79.4 years nationally), but below the average for females at 82.9 years (compared to 83.1 years), although both values are relatively close to the national average.

Table 2.5: Life expectancy at birth, 2018-2020			
	Fylde	North West	England
Males	79.9	77.9	79.4
Females	82.9	81.7	83.1

Source: Public Health Profiles, Public Health England

2.1.6 Health

In 2011, 78.1% of residents in Fylde did not have a long-term health condition or disability, with 11.5% of residents experiencing day-to-day activities limited a little by their condition and 10.4% limited a lot by their condition. The proportion of the resident population in Fylde with day-to-day activities limited a little or a lot by a long-term health condition or disability (21.9%) was greater than the proportion within Lancashire (20.0%), North West (20.3%) and England (17.6%). This is likely to reflect the relative age of the population in Fylde, rather than any underlying health issues.

	Fylde		Lancashire		North West		England	
	No.	%	No.	%	No.	%	No.	%
Resident population	75,757	100.0%	1,171,339	100.0%	7,052,177	100.0	53,012,456	100.0%
Day-to-day activities limited a lot	7,849	10.4%	115,343	9.8%	724,045	10.3	4,405,394	8.3%
Day-to-day activities limited a little	8,714	11.5%	119,669	10.2%	702,760	10.0	4,947,192	9.3%
Day-to-day activities not limited	59,194	78.1%	936,327	79.9%	5,625,372	79.8	43,659,870	82.4%

Source: Census 2011

2.2 Education and skills

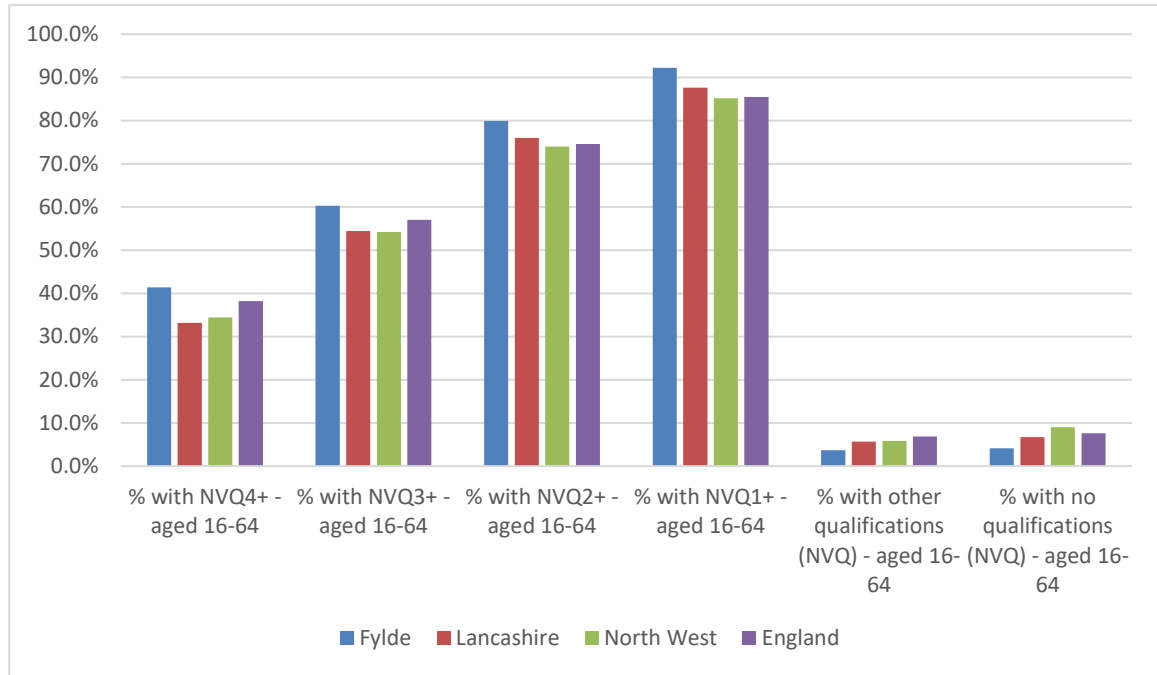
2.2.1 Qualification levels within the working age population

The educational attainment of Fylde's residential labour-force is relatively high compared to the comparator areas, both regionally and nationally, with a higher proportion of the working age population holding all levels of qualifications, except for other qualifications. For instance, the proportion of working age residents with qualifications at NVQ Level 4 or higher in Fylde in 2017 was 41.4% compared to 33.2% in Lancashire, 34.4% in North West and 38.2% in England. Moreover, Fylde contains the lowest proportion of residents who have no qualifications (4.1%) of all comparator areas.

	% with NVQ4+	% with NVQ3+	% with NVQ2+	% with NVQ1+	% with other qualifications	% with no qualifications
Fylde	41.4%	60.3%	79.9%	92.2%	3.7%	4.1%
Lancashire	33.2%	54.4%	76.0%	87.6%	5.7%	6.7%
North West	34.4%	54.2%	74.0%	85.2%	5.8%	9.0%
England	38.2%	57.0%	74.6%	85.5%	6.9%	7.6%

Source: Annual Population Survey

Figure 2.3: Qualifications of working age population, 2017



Source: Annual Population Survey

2.2.2 Education, Skills and Training deprivation

As part of the English indices of deprivation (2019), the Education, Skills and Training Deprivation Domain measures the lack of attainment and skills in the local population in relation to children and young people, and adult skills. Key data used to calculate the index includes key stage 2 attainment, key stage 4 attainment, secondary school absence rates, proportion staying on in education, entry to higher education, adults with low/no qualifications, and English language proficiency.

Analysis of the Fylde local authority finds that the area ranks 254 out of 317 local authorities for the education, skills and training deprivation domain (where 1st is the most deprived local authority for education). As of 2019, no LSOAs (small areas) in Fylde were amongst the most deprived 10% of English areas for education, skills and training, although one LSOA in the St Anne's Masterplan area (Fylde 006D) was within the top 30% most deprived LSOAs in England in 2019.

3 Economy

Key Points

- Employment in registered businesses (those which pay either VAT or PAYE, which are covered by the Business Register and Employment Survey) has fallen in Fylde over the past five years, in contrast to the comparator areas.
- Employment is concentrated in the manufacturing sector, which accounts for one in four jobs, significantly higher than the Lancashire average, which is itself much higher than the regional and national averages.
- Around 7,500 people work in the retail, and accommodation and food services sectors.
- There are around 3,800 businesses in Fylde, the vast majority of which employ fewer than 10 people (84.5%). The number of business starts fell during 2020, reflecting the impact of the pandemic, but there were still c. 400 new businesses started in this year.
- Data from Experian suggests that productivity is high in Fylde, with output per workforce job c. £58,000, compared to £54,000 nationally. This is likely to reflect the concentration of manufacturing employment.
- The total output of the Fylde economy is forecast to grow more slowly than the Lancashire, regional and national rates over the next 20 years.
- Analysis of labour market data shows high levels of employment, low unemployment, and a concentration of employment in associate professional and technical occupations (19.8% of jobs, compared to 14.4% in Lancashire as a whole). Workplace earnings are high in Fylde, at an average of £650 per week for full-time positions, although the average earnings of Fylde residents are lower, suggesting that higher-paid jobs are taken by in-commuters.

3.1 Employment

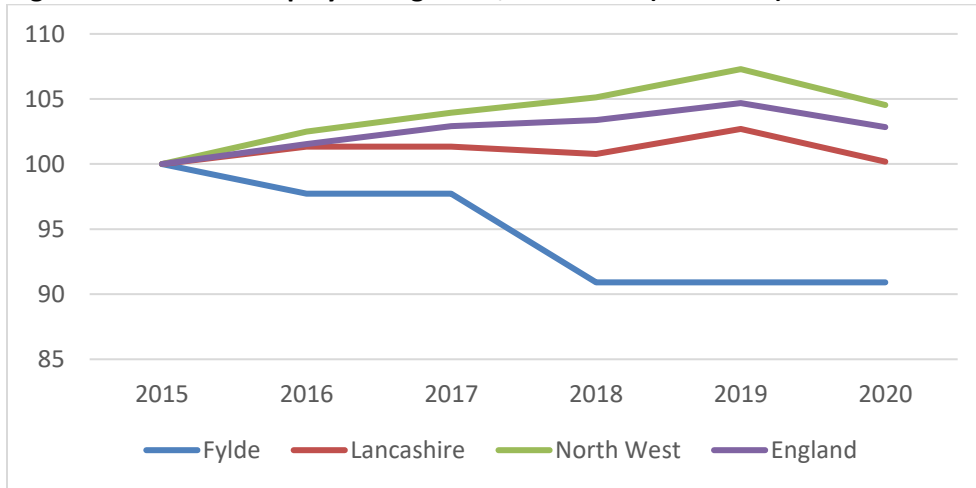
3.1.1 *Employment growth*

In 2020, employment in Fylde was estimated to be 40,000 – a decrease of 9.1% on 2015. By contrast, employment grew in the comparator areas between 2015 and 2020, increasing by 0.2% in Lancashire, 4.5% across the North West and 2.8% nationally. As evidenced by Figure 3.1, all areas experienced a similar magnitude decline between 2019 and 2020 reflecting the impact of Covid-19 on the labour market.

Table 3.1: Employment growth (2015-2020)			
	2015	2020	Change
Fylde	44,000	40,000	-9.1%
Lancashire	519,000	520,000	0.2%
North West	3,263,000	3,411,000	4.5%
England	25,934,000	26,671,000	2.8%

Source: Business Register and Employment Survey, 2021

Figure 3.1: Indexed employment growth, 2015-2020 (2015=100)



Source: Business Register and Employment Survey, 2021

3.1.2 Full-Time/Part-Time employment

There is also evidence that Fylde has a slightly below average proportion of full-time employees – compared to those working part-time. In 2020, 66.7% of employment in Fylde was full-time, compared to 67.7% in Lancashire, 67.7% in the North West and 68.1% in England.

Table 3.2: Employment status (2020)				
	Fylde	Lancashire	North West	England
Full-time employees (%)	66.7%	67.7%	67.7%	68.1%
Part-time employees (%)	33.3%	32.3%	32.3%	31.9%

Source: Business Register and Employment Survey, 2021

3.1.3 Employment by sector

In 2020, the largest industry for employment in Fylde was Manufacturing which accounted for 25.0% of all employment in the local authority area. This was significantly higher than the level in Lancashire (14.2%), North West (9.6%) and England (7.6%), and reflects the presence of major businesses such as British Aerospace and Westinghouse Springfields. The second largest industry for employment in Fylde in 2020 was Professional, scientific & technical which represented 17.5% of all employment; higher than the proportion of employment the industry represented across Lancashire (6.0%), North West (8.8%) and England (9.1%).

Fylde also had above average proportions of employment in Retail (10.0% compared to 9.3% nationally) and Accommodation & food services (8.8% compared to 7.1% nationally). By contrast, Fylde had a relatively lower proportion of employment in the industries of Health (8.8% compared to 12.9% nationally), Education (5.6% compared to 8.7% nationally) and Business administration & support services (4.4% compared to 8.8% nationally).

Table 3.3: Employment by industry (2020)					
Breakdown of employment by industry (2020)	Fylde Total	Fylde (%)	Lancashire (%)	North West (%)	England (%)
Manufacturing	10,000	25.0%	14.2%	9.6%	7.6%
Professional, scientific & technical	7,000	17.5%	6.0%	8.8%	9.1%
Retail	4,000	10.0%	11.2%	10.8%	9.3%
Accommodation & food services	3,500	8.8%	6.5%	6.7%	7.1%
Health	3,500	8.8%	14.0%	14.1%	12.9%
Education	2,250	5.6%	8.8%	8.3%	8.7%
Construction	1,750	4.4%	6.2%	4.3%	4.9%
Business administration & support services	1,750	4.4%	6.0%	8.2%	8.8%
Information & communication	1,000	2.5%	2.5%	3.0%	4.5%
Public administration & defence	1,000	2.5%	3.8%	4.5%	4.1%
Arts, entertainment, recreation & other services	1,000	2.5%	3.5%	4.0%	4.3%
Transport & storage (inc. postal)	800	2.0%	3.7%	5.0%	5.2%
Financial & insurance	800	2.0%	1.3%	2.6%	3.5%
Motor trades	700	1.8%	2.5%	2.0%	1.8%
Wholesale	700	1.8%	4.4%	4.0%	3.9%
Agriculture, forestry & fishing	500	1.2%	2.1%	1.1%	1.4%

Property	400	1.0%	1.3%	1.8%	2.0%
Mining, quarrying & utilities	300	0.8%	1.5%	1.3%	1.1%
TOTAL	40,000	100%	100%	100%	100%

Source: Business Register and Employment Survey, 2021

3.2 Business

3.2.1 Change over time

In Fylde, the number of local units (businesses) has increased between 2016 and 2021 by 4.4%, from 3,670 in 2016 to 3,830 in 2021. Over the same period, the growth rate in the number of local units was greater in Lancashire (4.8%), North West (8.6%) and England (7.6%).

	2016	2021	Change
Fylde	3,670	3,830	4.4%
Lancashire	49,600	51,965	4.8%
North West	294,205	319,420	8.6%
England	2,584,465	2,779,730	7.6%

Source: UK Business Counts – local units by industry and employment size band

3.2.2 Business size

In 2021, the vast majority of local units in Fylde were micro businesses (84.5%) with zero to nine employees, followed by small businesses with 10 to 49 employees (12.8%) and medium-sized with 50 to 249 employees (2.3%). There were 15 large businesses with over 250 employees in Fylde in 2021 (0.4% of total local units)¹. The proportion of micro businesses in Fylde was above the proportion in Lancashire (83.7%) and the North West (83.7%) which had more small, medium and large-sized local units. The proportion of micro businesses in England (85.1%) is above the level for Fylde, with the proportion of small, medium and large sized enterprises lower across England.

¹ Data is rounded to the nearest 5 before release so this should be understood to be an estimate rather than a precise figure.

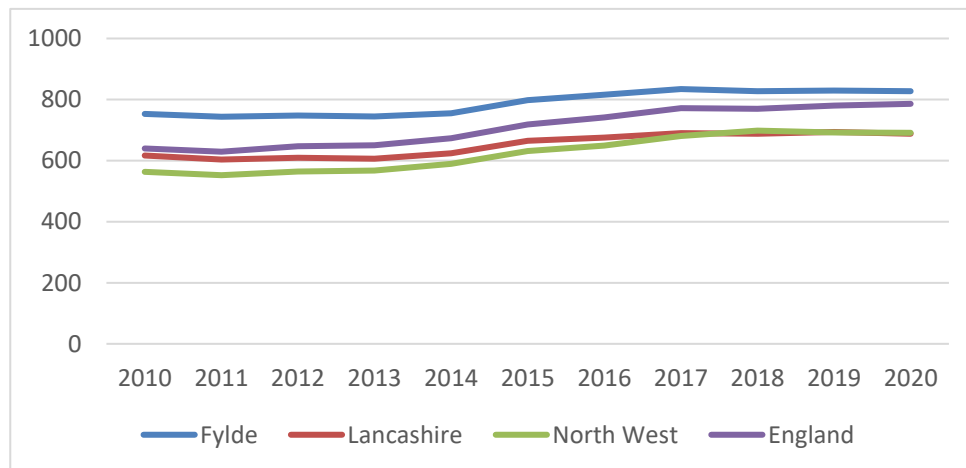
Table 3.5: Local units by size (2021)

	Micro (0 to 9)	Small (10 to 49)	Medium-sized (50 to 249)	Large (250+)
Fylde	84.5%	12.8%	2.3%	0.4%
Lancashire	83.7%	13.3%	2.6%	0.4%
North West	83.7%	13.1%	2.8%	0.4%
England	85.1%	12.0%	2.5%	0.4%

3.2.3 Business density

In 2020, Fylde had a business density (number of local units per 10,000 adults aged 16 to 64) of 827. This exceeds the business density ratio for Lancashire (687), North West (691) and England (786) for the same year. Analysis finds that Fylde has consistently had a higher proportion of businesses to residents, when compared with Lancashire, the North West and England.

Figure 3.2: Business Density (local units per 10,000 working age adults)



Source: ONS Population estimates – local authority based by single year of age; UK Business Counts – local units by industry and employment size band

3.2.4 Local units by industry

There were 575 local units in the Professional, scientific & technical sector in Fylde in 2021 – making it the sector with the largest proportion of local units (15.0%). The proportion of local units in the sector was above the proportion in Lancashire (11.6%) and North West (13.8%), but below the proportion in England (15.2%). The second largest sector by number of local units was Retail which represented 11.0% of all units in Fylde – above the proportions in Lancashire (11.6%) and England (9.8%) but below the proportion in the North West (11.3%). Other sectors with a high proportion of local units in Fylde relative to the comparator areas include Accommodation

and food services (8.0% compared to 6.5% nationally), Health (5.9% compared to 5.0% nationally) and Agriculture, forestry & fishing (4.6% compared to 3.4% nationally).

Table 3.5: Local units by industry (2021)					
Breakdown of local units by industry (2021)	Fylde Total	Fylde (%)	Lancashire (%)	North West (%)	England (%)
Professional, scientific & technical	575	15.0%	11.6%	13.8%	15.2%
Retail	420	11.0%	10.8%	11.3%	9.8%
Construction	390	10.2%	12.0%	10.5%	11.6%
Accommodation & food services	305	8.0%	6.9%	7.2%	6.5%
Business administration & support services	295	7.7%	7.9%	8.6%	8.7%
Information & communication	250	6.5%	4.2%	5.0%	7.3%
Arts, entertainment, recreation & other services	230	6.0%	6.2%	6.3%	6.3%
Health	225	5.9%	5.6%	5.7%	5.0%
Manufacturing	185	4.8%	6.3%	5.1%	4.6%
Agriculture, forestry & fishing	175	4.6%	5.6%	3.5%	3.4%
Property	165	4.3%	3.4%	3.7%	3.8%
Transport & storage (inc. postal)	140	3.7%	5.1%	5.4%	4.9%
Wholesale	130	3.4%	4.5%	4.5%	4.0%
Motor trades	100	2.6%	3.7%	3.0%	2.8%
Financial & insurance	100	2.6%	2.2%	2.8%	2.4%
Education	90	2.3%	2.5%	2.4%	2.3%
Mining, quarrying & utilities	30	0.8%	0.7%	0.6%	0.6%
Public administration & defence	30	0.8%	0.7%	0.7%	0.7%
TOTAL	3,830	100%	100%	100%	100%

Source: UK Business Counts – local units by industry and employment size band

3.2.5 Business births, deaths and survival rates

In 2020, there were 385 new business births in Fylde² – a decrease of 4.9% since 2015. The number of business births in the local authority has fluctuated in recent years with a small decline since 2018. Between 2015 and 2020, the number of business births increased by 6.1% in

² ONS Business Demography 2020

Lancashire and 3.5% in the North West however declined by 6.5% in England. Fylde, North West and England all experienced a decline in the number of business births between 2019 and 2020 – likely due to the increased uncertainty and economic conditions due to Covid-19.

Conversely, in Fylde in 2020 there were 355 business deaths – an increase of 9.2% since 2015. Over the same period, the number of new business deaths increased by 0.6% in Lancashire, 5.8% in North West and 13.0% in England. The enterprise conditions in Fylde resulted in a five-year business survival rate of 40.7% which lower than the rate in Lancashire (42.1%), but exceeded the regional (38.7%) and national (39.5%) rates.

3.3 Economic forecasts

Economic forecasts from Experian find that Fylde had an estimated Gross Value Added (GVA) of £2,727.7 million in 2021 which is expected to increase by 33.6% over the next 20 years to reach £3,645.1 million in 2041. This increase is forecast to be lower than the GVA increases forecast for Lancashire (36.6%), North West (41.1%) and United Kingdom (46.7%) over the same period.

Table 3.6: GVA forecasts (2021-2041)			
	2021	2041	Change
Fylde	£2.7 billion	£3.6 billion	+33.6%
Lancashire	£32.6 billion	£44.5 billion	+36.6%
North West	£178.0 billion	£251.1 billion	+41.1%
United Kingdom	£1,883.4 billion	£2,763.5 billion	+46.7%

Source: Experian, 2021

There were an estimated 46,100 workforce jobs in Fylde in 2021. Between 2021 and 2041, the number of workforce jobs in the local authority area is expected to increase by 6.1% to reach 48,900 by 2041. This growth rate is higher than forecast growth in workforce jobs in Lancashire (4.6%), but lower than the jobs growth rates forecast for North West (7.6%) and United Kingdom (13.9%).

Table 3.7: Workforce jobs forecasts (2021-2041)			
	2021	2041	Change
Fylde	46,100	48,900	+6.1%
Lancashire	721,400	754,400	+4.6%
North West	3,734,080	4,017,280	+7.6%
United Kingdom	34,725,520	39,558,680	+13.9%

Source: Experian, 2021

3.4 Labour market

3.4.1 Economic activity and employment rates

In 2020-2021, Fylde had an employment rate for adults of working age of 74.3% which was above the employment rate in the North West (73.1%) but below the rate for Lancashire (75.4%) and England (74.7%) over the same period. For the same period, Fylde had an economic activity rate of 76.6% which was below the rates in Lancashire (78.3%), North West (77.0%) and England (78.8%). Consequently, as a proportion of the total working age population, Fylde had the greatest economic inactivity rate (23.4%) out of the comparator areas.

Table 3.8: Employment, Economic Activity and Inactivity (July 2020-June 2021)				
	Fylde	Lancashire	North West	England
Employment rate, % of working age population:	74.3%	75.4%	73.1%	74.7%
Economic activity rate, % of working age population:	76.6%	78.3%	77.0%	78.8%
Economic inactivity rate, % of working age population:	23.4%	21.7%	23.0%	21.2%

Source: Annual Population Survey, 2021

3.4.2 Claimant count

As of October 2021, the claimant count for Fylde was 1,625, as measured by combining the number of people claiming Jobseeker's Allowance (JSA) and National Insurance credits with the number of people receiving Universal Credit principally for the reason of being unemployed. This represented a claimant rate of 3.5% of the working age population in Fylde which was below the county (4.5%), regional (5.4%) and national (4.9%) claimant rates over the same period.

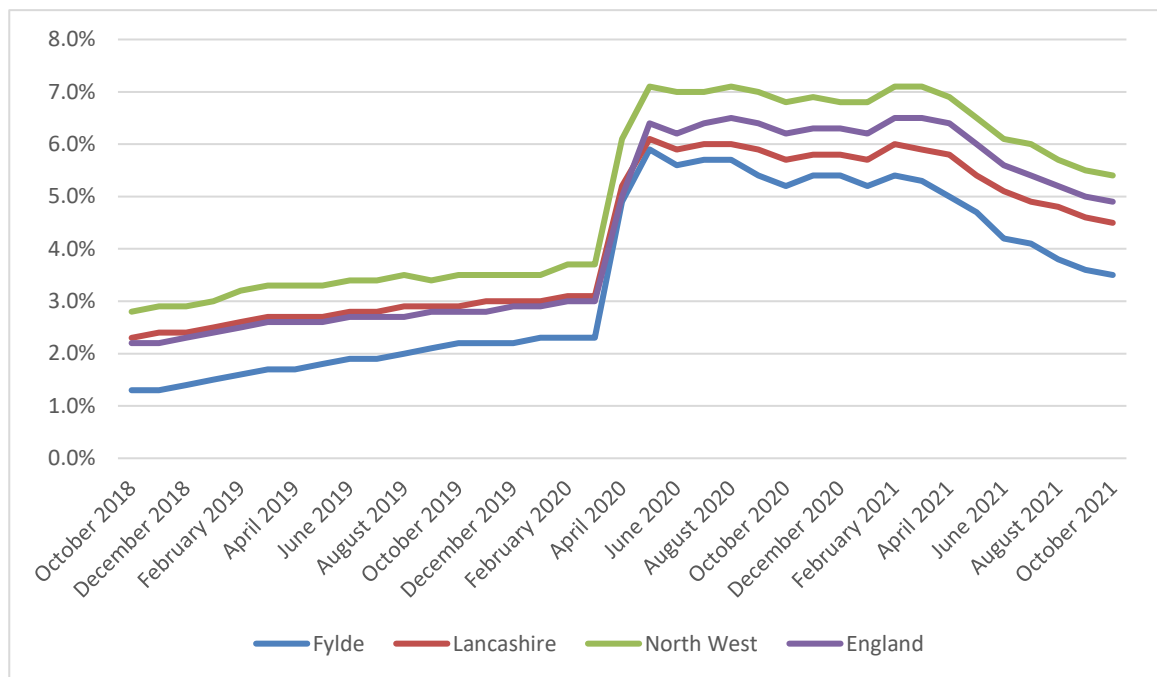
The claimant rate in Fylde has fluctuated over recent years, however the proportion of working age residents claiming benefits increased from 2.3% to 4.9% between March 2020 and April 2020 and peaked at 5.9% in May 2020. Significant increases in the claimant rate over the same period were also observed for the comparator areas over the same period although at a smaller magnitude than the more than doubling of the rate in Fylde. This sudden increase does not follow the wider trend and is due to the negative economic impacts of the coronavirus pandemic and lockdown measures.

Table 3.9: Claimant rate

Claimant rate (% of resident population aged 16-64)	October 2018	October 2019	October 2020	October 2021
Fylde	1.3%	2.2%	5.2%	3.5%
Lancashire	2.3%	2.9%	5.7%	4.5%
North West	2.8%	3.5%	6.8%	5.4%
England	2.2%	2.8%	6.2%	4.9%

Source: Office for National Statistics – Claimant count by sex and age

Figure 3.3: Claimants as a proportion of residents aged 16-64 (October 2018-October 2021)



Source: Office for National Statistics – Claimant count by sex and age

3.4.3 Occupations

In 2020-2021, the largest proportion of employment in Fylde was in associate professional & technical occupations at 19.8%, above the proportion in Lancashire (14.4%), North West (14.7%) and England (15.6%). The second largest occupation for employment in Fylde was managers, directors and senior officials which accounted for 16.6% of employment, compared to 10.7% in Lancashire, 10.2% in North West and 11.2% in England. Additionally, the proportion of employment in administrative and secretarial occupations, elementary occupations and process, plant and machine operatives in Fylde was above the regional and national rates.

Table 3.10: Proportion of employment by occupation (%), July 2020-June 2021				
	Fylde	Lancashire	North West	England
Associate professional & technical occupations	19.8%	14.4%	14.7%	15.6%
Managers, directors and senior officials	16.6%	10.7%	10.2%	11.2%
Administrative and secretarial occupations	14.4%	8.9%	10.6%	10.3%
Elementary occupations	13.0%	11.3%	10.2%	9.0%
Professional occupations	10.2%	20.9%	22.2%	23.4%
Skilled trades occupations	8.8%	10.4%	8.8%	8.9%
Process, plant and machine operatives	8.0%	7.2%	6.3%	5.5%
Caring, leisure and other service occupations	4.7%	8.3%	8.7%	8.9%
Sales and customer service occupations	4.5%	7.7%	8.0%	7.0%

Source: Annual Population Survey, 2021

3.4.4 Earnings

In 2021, median weekly earnings for full-time workers in Fylde (£612.10) were above earnings in Lancashire (£574.90) and the North West (£578) but lower than the comparator area of England (£613.30). Fylde has experienced -a reduction in resident-based earnings of 0.3% since 2019, whilst there was growth in resident-based earnings in Lancashire, North West and England over the same period.

Table 3.11: Resident Earnings				
Median resident earnings for full-time workers (£ per week)	2019	2020	2021	Change 2019-2021 (%)
Fylde	614.1	662.4	612.1	-0.3%
Lancashire	551.8	538.5	574.9	4.2%
North West	555.8	558.1	578.0	4.0%
England	592.1	589.9	613.3	3.6%

Source: ONS annual survey of hours and earnings – resident analysis

Median weekly workplace earnings for full-time workers in Fylde was £650.80 in 2021. For comparison, the median gross weekly workplace earnings for all workers between 2019-2021 in comparators areas are shown in Table 3.8.

Workplace-based earnings in Fylde were above resident-based earnings in 2021, suggesting that earnings are higher for those who work in Fylde than those who live there which may reflect a trend of in-commuting for higher paid jobs in the area. The decrease in the median gross weekly workplace-based earnings in Fylde (3.9%) was a larger decrease than the decrease in resident-based earnings. By contrast, average workplace wage growth in Lancashire, North West and England was positive for the period 2019-2021.

Table 3.12: Workplace Earnings				
Median workplace earnings for full-time workers (£ per week)	2019	2020	2021	Change 2019-2021 (%)
Fylde	677.2	641.8	650.8	-3.9%
Lancashire	534.0	527.1	558.4	4.6%
North West	550.5	557.8	575.8	4.6%
England	592.2	590.0	613.3	3.6%

Source: ONS annual survey of hours and earnings – workplace analysis

4 Place

Key Points

- On average, houses in Fylde are some of the most expensive in Lancashire (£213,500 median price), but prices vary considerably and are much lower in St Annes (£176,000 in Central ward).
- Despite relatively high earnings, the house price to earnings ratio in Fylde is 5.68:1, making it one of the least affordable parts of Lancashire in which to buy a home.
- Fylde has good levels of Superfast broadband connectivity, and over 30% of premises can receive the highest level of Full Fibre coverage (FTTP).
- Fylde as a whole performs well on measures of deprivation, but there are concentrations of disadvantage around St Annes, with one local area ranked as being amongst the 10% most deprived places in England.
- Similarly, crime levels overall are low in Fylde, but the area around St Annes town centre is classed as amongst the 50% most deprived areas in England in terms of crime.

4.1 Property market

In 2020, the median house price³ in Fylde local authority area was £213,500 which exceeded the median property price in Lancashire (£163,000) and the North West (£175,000) but was below the national median price paid for all properties (£260,000 in England). Within Fylde, Central ward (which includes The Island and South Promenade area) had a median property price paid⁴ of £176,000 in 2020 which was significantly below the local authority level. Similarly, Fylde had an affordability ratio⁵ (ratio of median house price to median gross annual residence-based earnings) of 5.68 in 2020 which resulted in properties being more affordable than in England (7.84) for the same period but less affordable than within the Lancashire region (5.42).

Property data also shows that of the 40,454 dwellings in Fylde in 2020⁶, 91.8% were Private Sector properties, 7.5% were Private Registered Provider properties, 0.6% were other public sector and there were no Local Authority owned properties in Fylde in 2020. By contrast, there was a higher proportion of public sector properties in Lancashire and England in 2020, with Private Sector properties representing 87.7% of total properties in Lancashire and 83.0% nationally.

In Fylde, the largest proportion of properties⁷ were in Council Tax Band C (23.1%), followed by Band D (18.3%) and Band A (17.7%). Within England and Wales, the largest proportion of

³ ONS Median house prices for administrative geographies: HPSSA dataset 9, November 2021

⁴ ONS Median house prices by ward: HPSSA dataset 37, November 2021

⁵ ONS House price to residence-based earnings ratio, 2021

⁶ DLUHC, Live tables on dwelling stock (including vacants), Table 100 Dwelling stock: Number of Dwellings by Tenure and district: England; 2020

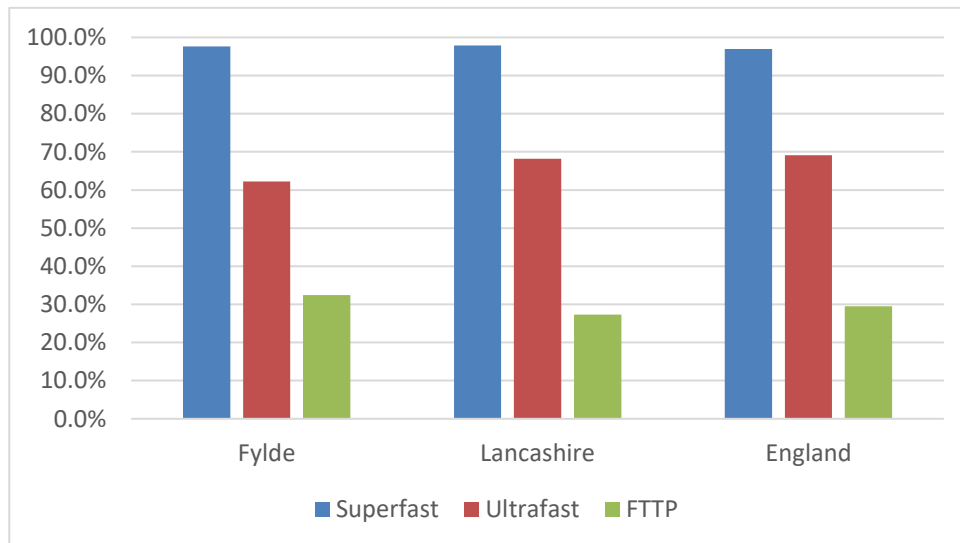
⁷ DLUHC, Live tables on Council Tax, 2021

properties were in Band A (23.6%), Band C (21.9%) and Band B (19.6%). At the local level to St Anne's town centre⁸, the largest proportion of properties were Band A which reflects the lower land values in the masterplan area compared to the local authority overall.

4.2 Digital Connectivity

Compared to the Lancashire and England averages, Fylde local authority area has a similar level of superfast internet coverage, however lower levels of low levels of ultrafast fibre coverage. Fylde also has the highest level of Full Fibre coverage (FTTP), which is vital as digital connectivity is increasingly important as services, entertainment and work increasingly move online and the economy recovers from the impact of Covid-19.

Figure 4.1: Digital Connectivity, proportion of premises (2021)



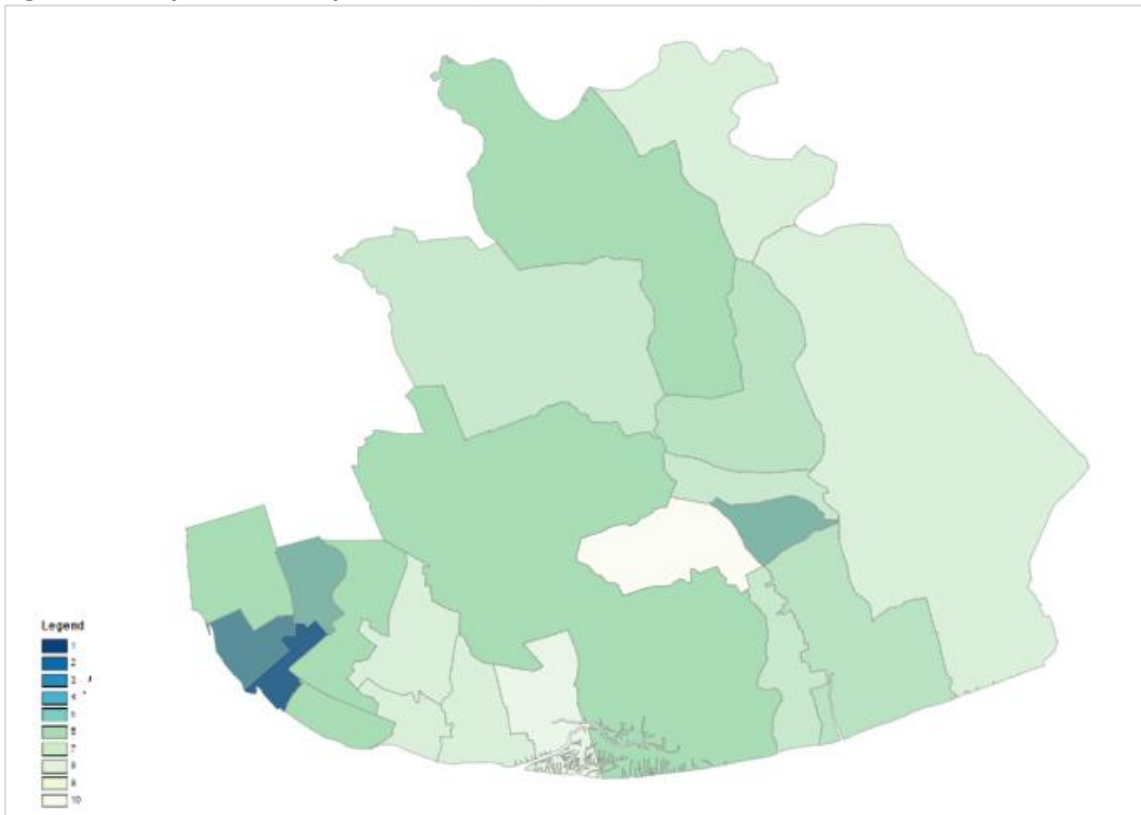
Source: ThinkBroadband, 2021

4.3 Local deprivation

The English Indices of Deprivation (2019) shows that Fylde is the 195th most deprived local authority (out of 317, where 1st is the most deprived) in England based on rank of average score. The data finds that only one LSOA (small area) in Fylde is within the top 10% most deprived nationally (3.9% of all LSOAs). In the immediate masterplan area, Fylde 006D is within the most deprived 10% of LSOAs nationally (shown in the darkest shade on the map below), Fylde 006C is within the top 20% most deprived and Fylde 006E is within the 30% most deprived LSOAs. Mapping of this data shows that the areas of relative deprivation are concentrated around St Anne's town centre shopping area.

⁸ LSOAs: Fylde 006C, Fylde 006D and Fylde 006E

Figure 4.2: Deprivation in Fylde LSOAs (2019)



Source: Indices of Deprivation 2019, via Lancashire Insight, Lancashire County Council

Fylde local authority area as a whole is ranked as relatively less deprived across all the Indices of Deprivations. However, the LSOAs in St. Anne's, and the masterplan are in particular, have higher levels of deprivation. For example, Fylde 006C and Fylde 006D are within the 10% most deprived LSOAs in England for the Employment decile (Fylde 006E is in the 20% most deprived), whilst Fylde local authority is ranked 126th nationally – highlighting the regional inequality and relative deprivation experienced within the town. Similarly, Fylde 006C, 006D and 006E are all ranked within the 10% most deprived small areas in England for the Living Environment domain whilst Fylde has a rank of average score of 157 out of 317 local authorities.

4.4 Crime

Whilst Fylde has relatively low levels of crime, with 48 recorded crimes per 1,000 population in the year to March 2021, the third lowest rate in Lancashire⁹. Fylde is ranked 245 out of 317 local authorities for the Crime domain of the English Indices of Deprivation (2019). However, there are areas of the local authority with higher rates of crime and antisocial behaviour, including St. Anne's. The three LSOAs most closely aligned to the masterplan area are ranked within the top 50% most deprived areas for Crime in England.

⁹ Crime in Lancashire 2020/21, Lancashire County Council, July 2021



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