

August 2024

Fylde Coast Economic Needs Update and Employment Land Review

Blackpool, Fylde and Wyre Borough Councils



Blackpool Council



TABLE OF CONTENTS

EXECUTIVE SUMMARY.....	3
1.0 INTRODUCTION.....	25
2.0 STRATEGIC AND POLICY CONTEXT	29
3.0 SOCIO-ECONOMIC PROFILE	127
4.0 PROPERTY MARKET ASSESSMENT	217
5.0 STAKEHOLDER CONSULTATIONS	262
6.0 FYLDE COAST FUNCTIONAL ECONOMIC MARKET AREA.....	286
7.0 EMPLOYMENT LAND ASSESSMENT – EXISTING LAND SUPPLY.....	303
8.0 OBJECTIVELY ASSESSED NEEDS	440
9.0 FURTHER GROWTH OPPORTUNITIES – POTENTIAL FUTURE EMPLOYMENT LAND SUPPLY.....	498
10.0 CONCLUSIONS.....	512
11.0 RECOMMENDATIONS	555

TABLE OF APPENDICES

Appendix 1	List of Consultees
Appendix 2	Analysis of Cambridge Econometrics Forecasting
Appendix 3a	Blackpool Employment Area Proformas
Appendix 3b	Blackpool Existing Employment Land Supply Proformas
Appendix 4a	Fylde Employment Area Proformas
Appendix 4b	Fylde Existing Employment Land Supply Proformas
Appendix 5a	Wyre Employment Area Proformas
Appendix 5b	Wyre Existing Employment Land Supply Proformas
Appendix 6	Existing Employment Sites Scoring
Appendix 7	Existing Employment Sites Grading
Appendix 8	Forecast Working
Appendix 9	Blackpool Enterprise Zone Policy On Forecast Analysis
Appendix 10	Fylde Further Employment Land Opportunities Mapping
Appendix 11	Wyre Further Employment Land Opportunities Mapping

EXECUTIVE SUMMARY

Introduction

- i) This report provides an Economic Needs update and Employment Land Study for the Boroughs of Blackpool, Fylde and Wyre, which are known collectively as the Fylde Coast sub region. It was commissioned “*to inform the development of new local plans, which will guide future development for their respective areas*” reflecting government guidance set out in the National Planning Policy Framework (NPPF), National Planning Practice Guidance (PPG) and the requirements of the Duty to Cooperate.

Methodology

- ii) Key sectors which have seen growth since 2011, and which are projected to grow further to 2042, include Human Health and Social Work Activities (which serves the ageing population), Private Office Sectors (reflecting a more skilled, service sector economy), Construction, Accommodation and Food (most notably in Blackpool). Manufacturing is in decline in terms of job creation, reflecting longstanding regional and national trends as the sector moves away from low-value labour-intensive manufacturing and a movement towards automation and white-collar work. Overall, between 2022 and 2042, an increase of 9,262 jobs is projected across the Fylde Coast – 3,993 in Blackpool, 1,808 in Fylde, 3,461 in Wyre.
- iii) **GVA Change** – Gross Value Added (GVA) has grown across the Fylde Coast since 2011, increasing to £2,704 million in Blackpool, £2,654 million in Fylde, and £1,660 million in Wyre in 2021. The Health, Accommodation and Food Services, and Construction industry have all shown growth since 2011 in their GVA contributions to the local economy, aligning with the rise in employment in these sectors. The manufacturing sector has also seen an increase in value, despite job losses, further demonstrating the improved productivity of automation which is expected to persist. GVA is forecast to further increase by 2042, to £3,267 million in Blackpool, £2,770 million in Fylde, and £2,023 million in Wyre, with particular growth in the IT Services, Construction, and Property sectors. These changes align with policy priorities that focus on higher value jobs and digital infrastructure, which will lead to positive change, particularly in the case of Blackpool.

- iv) **Skills** – The Fylde Coast has been moving towards a higher value economy since at least 2011, and overall, local skill levels have been improving to match this. The number of people attaining NVQ Level 4+ qualifications, equal to a degree level, have seen substantial increases over the period, and the proportion of people possessing low skills levels has dropped. Skills are projected to improve further this decade, with skills shortages identified in most of the key growth sectors.
- v) Local firms are generally well aware of their skills shortages. Larger companies are actively addressing their ongoing skills needs. Smaller firms, which lack that capacity, may need greater support, particularly from Higher and Further Education institutions in the sub-region.
- vi) **Climate Change and Green Industries** – Agriculture is particularly vulnerable to shocks created by climate change, such as changing weather patterns limiting the growth of arable crops and impacting cattle behaviour. However, there are options to change farming practice to maintain agricultural yields and farm diversification. Combatting climate change is also expected to lead to growth in professional consulting (for net zero / low carbon solutions) to businesses, households and the public sector and construction. Beyond general sectoral growth, economic opportunities include:
- A growing construction sector will further boost demand for smaller industrial and warehouse properties
 - A growing range of renewable energy projects, beyond those already proposed in the Hillhouse Enterprise Zone. Increasingly industrial estates, business parks, large single businesses, etc. will also generate a portion of their own power through local renewable sources, which will require the production and installation of infrastructure
 - Investment into renewable energy (including offshore energy in the Irish Sea), carbon capture, climate modelling, building retrofit, amongst other topics, will generate opportunities in a diverse range of associated consulting and IT related sectors. Good quality office options will be needed to capture these businesses locally
 - The Fylde Coast should seek to attract not just renewable energy/low carbon infrastructure but also the manufacturing industries that produce that infrastructure. The Fylde Coast has a growing green energy cluster at Hillhouse, training facilities,

accessibility for offshore energy programmes and an established, and growing, advanced manufacturing cluster to support this.

Findings - Property Market

- vii) ***Industrial Property Market*** – On the Fylde Coast, over the last decade at least, the vast majority of market transactions have been for sub-500 sqm units meeting primarily local micro/small business needs. This is unsurprising as most of the existing industrial stock comprises sub-500 sqm units as does the supply of marketed premises and private sector development plans on identified employment sites. For units above 500 sqm, stakeholders identify the main shortage to be for mid-sized B2/B8 units of 1,500-4,000 sqm each to allow local businesses, currently occupying units of around 1,000 sqm each, to grow. At this time, rising construction costs, combined with limits on the rental levels which businesses are willing and able to pay, are discouraging developers from delivering the premises which might fill this supply gap. However, improving economic conditions, from 2025 onwards, are expected to prompt developers to start delivering at least some larger industrial and warehouse options. This last point was felt to be true across the Fylde Coast but will be particularly true in locations on strategic road corridors where business demand is focused.
- viii) ***Office Property Market*** – Flexible, high grade suites of sub 500 sqm each and particularly sub 200 sqm each which are well located on main road corridors and with good public transport links are required to support businesses increasingly engaged in hybrid working. Whitehills and Blackpool Airport/Squires Gate are the most desirable locations for office uses on the Fylde Coast, offering strong transport links and a sizeable body of high grade stock. The main Fylde Coast town centres, including Blackpool, St Annes, Lytham and Thornton Cleveleys benefit from critical masses of existing office firms who want to stay local but suffer from a lack of modern, higher grade space and serviced options which give businesses the flexibility they crave. A lack of modern office stock, of types required by businesses, is suppressing growth in the Fylde Coast but local rents are well below the level at which new build office development would be viable, without public sector support.

- ix) **The Enterprise Zones – The Blackpool Airport Enterprise Zone** has been a focus for investment by local industrial firms. Sub 500 sqm industrial units are most commonly required, but agents also report good interest for 2,000-4,000 sqm properties, mostly from established businesses from within the Fylde Coast and particularly from other areas of Blackpool. Site BB2: Eastern Gateway represents the best opportunity for the development of mid/larger sized industrial units, on the Fylde Coast, while the public sector led Knowledge Quarter (Silicone Sands) proposal is the strongest option for office development. **The Lancashire (BAE Warton) Enterprise Zone** remains in the exclusive use of BAE. As noted above, with the Sablesbury portion of the Enterprise Zone nearing capacity, the emphasis of further development will move to Warton in the future. Over 2023/2024 a new masterplan is being produced for the Warton Enterprise Zone, which will guide its future development. **The Hillhouse Enterprise Zone** has been, and will continue to be, a focus for investment into local industrial/warehouse premises and energy sector infrastructure. The strongest local demand is for industrial units, of mostly less than 1,000 sqm each, including an element of offices. Over 2024 a new masterplan is being produced for the Hillhouse Enterprise Zone, which will guide its future development.
- x) **Business Engagement** – Large industrial businesses are planning for growth, which is generating property requirements of 5,000-30,000 sqm, albeit not always in a single property. As units of this size range are not readily available in the Fylde Coast, and unlikely to be delivered in the short-medium term, many companies are looking to fund development to meet their own needs but can struggle to secure the land they need. The office firms contacted also report longer term growth plans which will generate property requirements of up to 3,000 sqm over the Local Plan period. Again, properties in this size range are rarely available locally and businesses have been proactive in securing space when it becomes available.

Findings - FEMA

- xi) The FEMA for Fylde Coast includes the Central Lancashire local authorities of Chorley, Preston and South Ribble, as well as Lancaster, Ribble Valley and Blackburn with Darwen. Within this wider area, the following economic issues are noted:
- The office market in the Fylde Coast will face ongoing competition from Preston City and the associated market area of South Rings/Bamber Bridge of South Ribble. However, in the present constrained market significant expansion of the office stock in Central Lancashire is unlikely, with the possible exception of the proposed 19,000 sqm of offices at the Cuerden Strategic Site or Lancashire Central, in South Ribble.
 - In recent years, growth in Preston has primarily been for B2/B8 uses in the North East of the City, at Junction 31a. Sitting at the opposite end of the M55 Corridor from the Fylde Coast this location will compete with the Fylde Coast for small-medium sized industrial and warehouse requirements, benefitting from its more direct links to the M6 Corridor than the Fylde Coast.
 - Access between the Fylde Coast and Preston now benefits from the newly opened Junction 2 M55 and associated link road to the A583. This new link will aid access between the Fylde Coast and Central Lancashire. Employment allocations in this area of Preston are possible, but at the time of writing none has been confirmed.
 - The Samlesbury Enterprise Zone in South Ribble/Ribble Valley has been the focus for development activity in the wider Lancashire Enterprise Zone, which also includes BAE Warton. The Samlesbury Enterprise Zone will also now accommodate a campus for the National Cyber Force, which draw in high skilled labour for ICT sectors from across Lancashire. However, with the development of the Campus, the Samlesbury Enterprise Zone will be close to capacity and the emphasis of development in areas such as aerospace could move more to the Warton and Blackpool Airport Enterprise Zones.
 - The Bailrigg Garden Village, Lancaster, a major development proposal close to the boundary with Wyre is now subject to a full review of the Lancaster Local Plan.
 - Heysham Port, Lancaster is the main competing facility for Fleetwood and its continued growth is expected to limit options for port related facilities at Fleetwood Port.

Existing Employment Areas

- xii) 86 Employment Areas – 13 in Blackpool, 39 in Fylde and 34 in Wyre – have been assessed. Five areas, four in Fylde, one in Wyre, were identified as not being primarily occupied by E(g)/B-Class uses and not recommended for protection for such uses in emerging Local Plans. One area in Wyre fell within another, larger employment area and was also excluded. This left 80 areas, suitable for further consideration, which were assessed and graded A-E, as defined in Table ES1. Collectively they provide some 595 ha of land primarily in E(g)/B-Class employment use, containing nearly 1.23 million sqm of floorspace comprising 181 ha (553,309 sqm) in Blackpool, 283 ha (333,894 sqm) in Fylde, 131 ha (340,457 sqm) in Wyre.

Table ES1 – Grades Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly in the Local Plan Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, E(g), B2 and B8, including some new inward investors.	Protect strongly in the Local Plan Support and expand
C	Key employment sites with an influence over the whole local authority area, but primarily geared towards local businesses and E(g)(iii) light industrial, B2 and B8 uses.	Protect in the Local Plan Support
D	Lower quality locations in residential or rural areas suffering from poor accessibility and massing.	Continue to protect/review through the Local Plan
E	Very poor quality areas. Widespread vacancy and dereliction in poor environments. Or areas which have been, or are in the process of being, lost to other uses.	Promote alternative uses if possible

Source: BE Group 2024

xiii) Table ES2 summarises the Existing Employment Areas by each of the above grades.

Table ES2 – Existing Employment Areas Appraisal by Category

Grade	Blackpool No. of Sites	Fylde No. of Sites	Wyre No. of Sites
A	1	2	-
B	2	6	-
C	8	17	17
D	-	8	15
D/E	1	-	-
E	1	2	-
N/A	-	4	1
Total	13	39	33¹

Source: BE Group, 2024

xiv) All but one of the 80 Areas were well occupied (with no significant areas of void premises). This shows that most of these locations are functioning well and still providing the premises offer which at least local firms require. Conversely, this also means that there are few opportunities for redevelopment or infill development within this brownfield land. In Blackpool, Warbeck Hill which provides some 28,654 sqm of offices is vacant and likely to be lost to alternative, non E(g)/B-Class Uses. Although this will represent a sizeable reduction in Blackpool’s overall quantum of stock, the broader impacts of this loss would be modest as this older, ex-public sector office property could not meet modern, private sector occupier needs without very extensive refurbishment or indeed redevelopment. Preston New Road (NS&I), in Blackpool, is occupied at present but may become vacant in the long term and, if it does, will face similar issues to Warbeck Hill as it is a large, isolated office building in a residential area.

¹ Long Acres Farm falls into the allocated Employment Area Longacres Business Park, Stalmine and is reviewed in combination with that Employment Area.

- xv) Apart from Warbreck Hill and Preston New Road (which received a ‘D/E’ Grading), Freckleton Boatyard and Carr Farm, Lodge Lane Warton, both in Fylde, received an ‘E’ Grading, accommodating only a couple of micro businesses, in largely very low grade stock. They do not merit ongoing protection, for E(g)/B-Class uses in the Local Plan.

Present Employment Land Supply

- xvi) By local authority area, the main findings are:
- *Blackpool* – This Study has examined the 13 identified Employment Areas of Blackpool Borough and identified opportunities for redevelopment and expansion, which could provide brownfield employment development land for the Borough. Excluding land already developed or being held for the exclusive use of specific businesses gives a realistic supply of 12.96 ha of exclusively industrial/warehouse land in five sites, focused at Blackpool Airport Enterprise Zone
 - *Fylde* – A baseline supply of 56.35 ha, in 11 sites, was identified in Fylde Council’s latest Business and Industrial Land Schedule (March 2023). Excluding land which is undevelopable and adjusting land to reflect the aspirations of landowners gives an increased realistic supply of 56.61 ha in ten sites, focused at Whitehills and nearby Squires Gate.
 - *Wyre* – From a maximum supply of 52 sites, Local Plan allocations and outstanding consents, a baseline supply of 35.82 ha in 13 sites is identified, excluding non-relevant consents. This reduces, very slightly to a realistic supply of 35.08 ha in 12 sites, primarily through a revised estimate of the available land at WY1: Fleetwood Dock, Fleetwood and WY2: Hillhouse Technology Enterprise Zone, Thornton. However, four sites – WY4 South of Goose Lane, Catterall (1.00 ha), WY5 Land West of the A6, Garstang (4.68 ha), WY7 Land West of Great Eccleston (1.00 ha) and WY8 Forton Extension, Forton (1.00 ha) – could be lost to non E(g)/B-Class uses over the Local Plan period 2022-2042 (see Section 10.0). Therefore, a worst case scenario is also put forward, assuming that all these sites are ultimately lost in full of 27.40 ha in nine sites.

Objectively Assessed Needs

- xvii) Three alternative forecast options have been produced and considered for the period 2022-2042, for Blackpool, Fylde and Wyre.

Labour Demand

- xviii) Model One is Labour Demand, a baseline or Policy-Off forecast which makes no allowance for major public policy interventions on the Fylde Coast. It uses, as its base, the Cambridge Econometrics forecast of jobs change, by sector, over 2022-2042. That forecast projected a gain of 9,262 jobs across the Fylde Coast – 3,993 in Blackpool, 1,808 in Fylde, 3,461 in Wyre – to 2042.
- xix) These baseline jobs figures are then adjusted to allow for real world conditions:
- An allowance is made for part time working in the labour force, by converting the forecasts for total employment, by sector, into forecasts for Full-Time Equivalent (FTE) jobs by sector
 - Deductions are made for homeworking based on 2021 Census data.
 - The FTE jobs change figures are converted into a floorspace and land need using standard estimates of jobs density, the floorspace each job requires, and estimates of what proportion of the jobs will be accommodated in E(g)/B-Class property.
- xx) Model One examined the ‘policy off’ position, i.e., the outcome which, given national trends in the economy, might be expected to occur locally anyway without any intervention from public policy and programmes. Model Two is a is Labour Demand ‘Policy On’ scenario which provides a sensitivity test of the baseline forecasts against existing and emerging strategic policy initiatives, specifically the Enterprise Zones present in Blackpool, Fylde and Wyre, combined with key regeneration projects in Central Blackpool. In the case of the Warton (Fylde) and Hillhouse (Wyre) Enterprise Zones there is insufficient clarity as to the scale and nature of likely projects, on a plot by plot basis, to produce a clear projection of the additional jobs which might be generated here. In the case of regeneration programmes in Central Blackpool, much of the additional employment is likely to be in retail and leisure sectors, not relevant to this Study, or involve the relocation of existing public sector jobs rather than generating new employment. The main exception is the

Talbot Gateway Phase 5, which is proposed for a large new office building. However, at the time of writing there was a lack of clarity about the likely occupier of this building, their nature and business sector, and if they represent inward investment for Blackpool or the relocation/expansion of an existing local organisation. Thus, at this time only Blackpool Airport Enterprise Zone has clearly defined, strategic level projects in the pipeline which will generate understandable jobs increases above the baseline forecast.

- xxi) Allowing for identified development plans at the Blackpool Airport Enterprise Zone, jobs densities in the premises to be developed, additionality and the proportion of jobs which would be displaced from elsewhere in the Fylde Coast, the Enterprise Zone will generate 2,627 additional jobs in total: 2,414 in the office focused Knowledge Quarter and 213 in the Aviation Quarter, for manufacturing sectors. All these jobs will need to be accommodated in the portion of the Enterprise Zone which falls into Fylde Borough.
- xxii) The jobs can then be included to the baseline forecasts of change to create a revised projection of needs to 2042, using the same methodology as Model One.

Historic Land Take Up

- xxiii) Model Three is Past Take Up, the forward projection of historic take up in the three local authority areas since 2001/2002. In the case of Blackpool, take up in the 2000s is inflated by direct investment, by SRB Challenge Fund finance, in commercial development on Blackpool Council owned sites. This is a situation which is unlikely to be repeated in the future. Accordingly, for Blackpool only, Model Three projects forward historic take up from 2012/2013 onwards. This gives an average annual take up rate for projection forward.
- xxiv) This annual take up rate can then be compared to rates of recorded loss of employment land, to non E(g)/B Class uses, to understand, and project forward the realistic rate of development in the Fylde Coast Local Authority Areas. In all three local authority areas the amount of loss, since 2011 at least, exceeds (or nearly exceeds in the case of Fylde) recorded completions on an average annual basis. Taking losses from completions thus leads to negligible or negative OAN projections which don't allow for any significant economic growth on the Fylde Coast to 2042.

- xxv) However, not all losses automatically need to be accounted for in OAN figures. Older offices are least likely to be needed by the market, particularly historic public sector properties which no longer meet modern specifications. Reflecting this, adjusted loss figures are given which account for recorded industrial and warehouse losses only.
- xxvi) The findings of the three models are summarised in Tables ES3 to ES5.

Table ES3 - Blackpool OAN Projections 2022-2042, ha

Sector	Labour Demand, Policy Off		Past Take Up
	Without Deduction for Homeworking	With a Deduction for Homeworking	With an Deduction Industrial/warehouse Losses Adjusted for
Office (inc. Research and Development)	3.23	2.57	-
Industrial	-5.01	- 5.01	11.40 ²
Warehouse	1.18	1.18	
Total	-0.60	-1.26	11.40

Source: BE Group, 2023

² It is assumed that future take up will be primarily/exclusively for industrial and warehouse uses, reflecting past completion trends since 2012/2013, as well as the private sector development proposed at this time

Table ES4 - Fylde OAN Projections 2022-2042, ha

Sector	Labour Demand, Policy Off		Labour Demand, Policy On		Past Take Up
	Without a Deduction for Homeworking	With a Deduction for Homeworking	Without a Deduction for Homeworking	With a Deduction for Homeworking	With an Adjusted Deduction for Industrial/warehouse Losses
Office (inc. Research and Development)	4.36	2.98	12.24	8.34	-
Industrial	- 31.30	- 31.30	- 30.67	-30.67	16.60 ³⁴
Warehouse	1.26	1.26	1.92	1.92	
Total	-25.68	-27.06	-16.51	-20.41	16.60

Source: BE Group, 2023

Table ES5 - Wyre OAN Projections 2022-2042, ha

Sector	Labour Demand, Policy Off		Past Take Up
	Without a Deduction for Homeworking	With a Deduction for Homeworking	With an Adjusted Deduction for Industrial/warehouse Losses
Office (inc. Research and Development)	3.00	2.21	2.61
Industrial	-4.91	- 4.91	9.41
Warehouse	0.61	0.61	9.38
Total	-1.30	-2.09	21.40

Source: BE Group, 2023

³ As noted in Paragraph 8.53, a split of past completions by use class is not available for Fylde. However, take up can be assumed to be primarily/exclusively industrial and warehouse based on past trends which have only seen a very limited delivery of new offices at Whitehills Business Park. New offices are only in the pipeline at Blackpool Airport Enterprise Zone, something accounted for in the Labour Demand, Policy On model.

⁴ The split of Past Take Up OAN, by Use Class, reflects patterns in recorded completions and losses since 2011/2012

- xxvii) A buffer of 3 years, or an extra 15 percent, is also applied to the above OAN figures to provide a choice of sites by size, quality and location, allow for exceptional losses, particularly through Permitted Development, and to provide a continuum of supply beyond the end of the forecast period.
- xxviii) In terms of a preferred OAN for offices, experience suggests that the quantum of office space required by businesses is strongly driven by the number of staff they have to accommodate. Thus, the jobs-based Labour Demand model is likely to best project office sector needs moving forward. As the majority of projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward.
- xxix) Discussions with stakeholders suggest that some two years after the end of the Covid-19 Pandemic and associated Lockdowns, homeworking and hybrid working practices are here to stay with impacts on the quantum of space businesses need. While it is not possible to say exactly how working practices will evolve to 2042, Labour Demand models with an allowance for homeworking are more realistic at this time.
- xxx) Requirements for industrial and warehouse premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker. Industrial and warehouse companies are also more likely to acquire and hold onto expansion land and premises, even in times of contraction in the business, than office sector companies, in anticipation of future growth. This results in a weaker link to the jobs-based Labour Demand modelling that was true for offices. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector, across the Fylde Coast, which is at odds with identified market demand and the almost exclusively industrial pipeline of development identified on local employment sites.
- xxxi) Here therefore the Past Take Up model is preferred as it is independent of jobs change projections and based on real world trends. It accounts for periods of growth and recession in the local economy since 2000, allowing that such economic growth and decline will continue to 2042. It is thus likely to be better in tune with real market demand than the Labour Demand model.

xxxii) The preferred OAN figures, and how they are derived, is summarised in Table ES6.

Table ES6 – Preferred OAN Summary

Sector	Base Requirement (hectares)	Addition – Displacement	Addition – Buffer (15 Percent Uplift)	Final OAN
Blackpool				
Office (inc. R&D) <i>(Need based on Labour Demand, Policy Off)</i>	2.57 <i>(From FTE Jobs Growth, with a 20.2 percent reduction for homeworking)</i>	N/A	+0.39	2.96
Industrial/Warehouse <i>(Need based on Past Take Up, with an adjustment for industrial/warehouse losses)</i>	11.40 <i>(0.57 ha/year x 20)</i>	N/A	+1.71	13.11
Total	13.97	-	+2.10	16.07
Fylde				
Office (inc. R&D) <i>(Need Based on Labour Demand, Policy On)</i>	8.34 <i>(From FTE Jobs Growth, with a 31.8 percent reduction for homeworking)</i>	N/A	+1.25	9.59
Industrial/Warehouse <i>(Need based on Past Take Up, with an adjustment for industrial/warehouse losses)</i>	16.60 <i>(0.83 ha/year x 20)</i>	N/A	+2.49	19.09
Total	24.94	-	+3.74	28.68
Wyre				
Office (inc. R&D) <i>(Need Based on Labour Demand, Policy Off)</i>	2.21 <i>(From FTE Jobs Growth, with a 26.1 percent reduction for homeworking)</i>	N/A	+0.33	2.54
Industrial/Warehouse <i>(Need based on Past Take Up, with an adjustment for industrial/warehouse losses)</i>	18.79 <i>(1.07 ha/year x 20 = 21.4 ha. Less 12.21 percent) (A reduction of 12.21 percent is made to allow for the percentage of take up which is likely to be office based, to avoid double counting with the office OAN forecasting model.)</i>	N/A	+2.82	21.61
Total	21.00	-	+3.15	24.15

Source: BE Group, 2024

Protecting Supplies and Meeting the Needs

- xxxiii) Combining the office, industrial and warehouse requirements gives an OAN for the Fylde Coast, to 2042 of 68.90 ha, comprising:
- Blackpool: 16.07 ha
 - Fylde: 28.68 ha
 - Wyre: 24.15 ha.
- xxxiv) Deducting the supply of 104.65 ha across the Fylde Coast, identified above indicates the following:
- Blackpool: 12.96 ha (supply) less 16.07 ha (OAN) = **-3.11 ha (further need)**
 - Fylde: 56.61 ha (supply) less 28.68 ha (OAN) = **+27.93 ha (surplus supply)**
 - Wyre: 35.08 ha supply (27.40 ha as a worst case scenario) less 24.15 ha (OAN) = **+3.25-10.93 ha (surplus supply).**
- xxxv) To meet the above needs, the following conclusions can be made, by local authority area.

Blackpool

- The study shows that there is need for 2.96ha of land for office development to 2042. In accordance with NPPF, Blackpool should look to accommodate this need in the first instance in Blackpool Town Centre in particular to support the Central Business District (Talbot Gateway) where Blackpool Council is actively promoting and supporting office development.
- However, there are also options to meet the office requirement through exploring the opportunity to collectively accommodate sub-regional office need of Fylde and Blackpool at Blackpool Airport Enterprise Zone on Fylde Site FY5, where office development could potentially be brought forward under public sector leadership.
- It should also be noted that a proportion of the additional E(g)(i) jobs forecast will be accommodated in any B2/B8 properties developed. Modern industrial and warehouse units increasingly combine administrative functions with production and logistics functions, on single sites for greater efficiency.
- It should be noted that currently, viability constraints mean that private sector office development, without public sector financial support, cannot be assumed in any location in Blackpool Borough.

- Overall, Blackpool has circa 13 ha of land for industrial and warehouse uses, which aligns with the identified OAN (the difference between the supply, at 12.96 ha, and the need at 13.11 ha is a negligible 0.16 ha).

Fylde

- Overall, Fylde has sufficient land to meet all its needs.
- Viability constraints mean that private sector office development, without public sector financial support, cannot be assumed in any one location in Fylde Borough. However, office development remains likely, under public sector leadership, at FY5: Blackpool Airport Enterprise Zone, Squires Gate and a large scale development here could meet business needs in Fylde and Blackpool.
- None of the current regeneration programmes are likely to deliver office uses in the main town centres of Fylde Borough and given viability constraints, new build private sector office development appears unlikely. However, less costly refurbishments of existing properties to accommodate office based businesses remain possible.
- Again, it must also be recognised that a proportion of the additional E(g)(i) jobs forecast will be accommodated in any B2/B8 properties developed, which combine administrative and production/logistics functions.
- Fylde has sufficient industrial and warehouse land to meet its needs, much of it focused in the core M55 Corridor area.
- However, none of that employment land supply is surplus to requirements as it is needed to allow existing development proposals to progress, provide choice for businesses, allow the development of mid-sized/larger industrial/warehouse units, support growth in Blackpool and allow for uncertainty as to what may be brought forward, at the Warton Enterprise Zone. Additionally, as noted above, there may still be a requirement to accommodate some of Blackpool's needs, both for offices and, likely later in the Local Plan period, for industrial and warehouse land.

Wyre

- Overall, Wyre has sufficient land to meet all its needs.
- As with Blackpool and Fylde, no site should be allocated just for office uses given the viability constraints to development at present. Office uses are proposed at WY2: Hillhouse Technology Enterprise Zone, Thornton. However, such development remains aspirational.
- None of the current regeneration programmes are likely to deliver office uses in the main town centres of Wyre Borough and given viability constraints, new build private sector office development appears unlikely. However, less costly refurbishments of existing properties to accommodate office based businesses remain possible.
- Again, it must also be recognised that a proportion of the additional E(g)(i) jobs forecast will be accommodated in any B2/B8 properties developed, which combine administrative and production/logistics functions.
- Overall, Wyre has sufficient land to meet its OAN for industrial and warehouse uses.
- However, Wyre has a surplus supply with a range of +3.25-10.93 ha depending on the best and worst case scenarios. In the worst case scenario, the loss of WY4, WY5, WY7 and WY8 to alternative uses, would reduce the supply surplus to only 3.25 ha (see Section 10.0), with heavy dependence on WY2: Hillhouse Technology Enterprise Zone, Thornton (where the ultimate amount of deliverable E(g)/B-Class land is also uncertain) in the Wyre Peninsula and on Site WY3: Riverside Industrial Park Extension, Catterall in the A6 Corridor.
- Given this uncertainty, it could be desirable to allocate or safeguard additional land, in the Local Plan, as a contingency. In this regard, Section 9.0 of the Main Report, identified three site options, totalling 18.34 ha which could meet some further needs. All are in the A6 Corridor, however, with no deliverable options identified for the Wyre Peninsula.
- Land safeguarding would not be needed in the Rural Area given the range of farm conversion, etc. being progressed here.

Recommendations

xxxvi) This report has had full regard to the requirements of the NPPF and the PPGs to encourage and deliver growth through the planning system. The key recommendations are:

- **Recommendation 1 – Defining and Protecting the Current Realistic Land Supply**
 - For this study, the current realistically available employment land supply in Blackpool is 12.96 ha in five sites, based on a review of undeveloped land within the Borough’s 13 Employment Areas, as identified in Table 48, Section 7.0 of the Main Report. For Fylde the supply is 56.61 ha in ten sites, as identified in Table 51, Section 7.0. For Wyre the supply is 35.08 ha in 12 sites, as identified in Table 54, Section 7.0. Subject to the points raised in Tables 103 to 106 of Section 11.0 of the Main Report, it is recommended that the three Councils seek to protect their employment land supplies from loss to alternative, non-E(g)/B2/B8, uses. Additionally, the sites safeguarded for E(g), B2, B8 uses in the Wyre Local Plan (2011-2031) (2023) – WY14: Port of Fleetwood, Fleetwood and WY15: Brockholes Industrial Estate Extension, Catterall – are heavily constrained, with no clear plans for delivery and significant issues with development viability. It is therefore recommended that they should not be allocated for E(g), B2, B8 in the next Wyre Local Plan.
- **Recommendation 2 – Defining the Objectively Assessed Need** – It is recommended that Blackpool, Fylde and Wyre Councils use the Labour Demand model (Model One/Two) as the main measure of future land need for office development for the period up to 2022-2042. This indicates needs of 15.09 ha in total, including a 3 year buffer. By local authority area:
 - Blackpool – 2.96 ha.
 - Fylde – 9.59 ha. Here the Policy On forecast is recommended as providing the most complete picture of employment change in the Borough, and particularly accounting for the Knowledge Quarter, Blackpool Airport Enterprise Zone, the largest office development likely on the Fylde Coast to 2042.
 - Wyre – 2.54 ha.
- In terms of industrial and warehouse needs, it is recommended that Blackpool, Fylde and Wyre Councils use the roll forward of Past Take Up (Model Three), with an adjustment for relevant losses, and a 3 year buffer. This indicates needs of 53.81ha in total. By local authority area:
 - Blackpool – 13.11 ha

- Fylde – 19.09 ha
- Wyre – 21.61 ha.
- **Recommendation 3 – Meeting Needs – Blackpool** – Against a combined OAN of 16.07 ha, Blackpool has a supply shortfall of 3.11 ha, which primarily comprises the office component of the need. To meet this E(g)(i) requirement it is recommended that Local Plan policy proactively encourages and focuses office development/refurbishment within Blackpool Town Centre; that the development of private sector offices be actively encouraged and supported within the main regeneration projects, most notably Talbot Gateway and that Blackpool Council engages with Fylde Council to explore the opportunity for the Knowledge Quarter component of Site FY5: Blackpool Airport Enterprise Zone, Squires Gate to collectively accommodate sub-regional office need of the two local authorities, in terms of its employment land outputs. This recommendation reflects the fact that development would occur on the boundary of Blackpool Borough and that Fylde has some surplus in its employment land supply.
- Additionally, although Blackpool has approximately enough industrial land to meet its needs, it is recommended that Blackpool Council carefully monitor employment land take up to determine if a supply shortfall is likely later in the Plan period and thus inform when future reviews of the Local Plan should take place.
- **Recommendation 4 – Meeting Needs – Fylde** – With a supply surplus of 27.93 ha against the OAN, there is no need for further employment land allocations in Fylde Borough. To meet office requirements, it is recommended that Local Plan policy proactively encourage and focus office development/refurbishments into the town centres of the Borough. Where possible, regeneration policy and practice should support and encourage this goal. It is also recommended that the next Fylde Local Plan, continue to protect the full existing employment land supply of 56.61 ha, for E(g), B2, B8 uses in order to allow existing development proposals to progress, provide choice for businesses, allow the development of mid-sized/larger industrial/warehouse units, support growth in Blackpool and allow for uncertainty as to what may be brought forward at BAE Warton/Lancashire Enterprise Zone.

- **Recommendation 5 – Meeting Needs – Wyre** – Wyre has a supply surplus against its OAN, indicating that there is no need for further employment land allocations in Wyre Borough. To meet office requirements, it is recommended that Local Plan policy proactively encourage and focus office development/refurbishments into the town centres of the Borough. Where possible, regeneration policy and practice should support and encourage this goal. As there are uncertainties around the deliverability, for E(g)/B-class uses at least, of a proportion of Wyre’s employment land supply, especially in the core market areas of the Wyre Peninsula and A6 Corridor, it is recommended that the new Wyre Local Plan considers allocating or safeguarding additional land as a minimum, focused in the Wyre Peninsula and A6 Corridor areas, for E(g), B2, B8 uses. This land would be made available for development if the available supply drops below OAN levels over the Local Plan period.
- **Recommendation 6 – Meeting Needs – Supporting Development in the Enterprise Zones** – There are uncertainties around the delivery of employment land in all three Enterprise Zones, accordingly:
 - *Blackpool Airport Enterprise Zone, Blackpool/Fylde* – In relation to proposals on Site FY5: Blackpool Airport Enterprise Zone, Squires Gate in Fylde it is recommended that Blackpool and Fylde Councils, plus the Airport and other partners, work to produce a delivery strategy to understand how these projects might be delivered, by whom, and to what timeframe. Also, it is recommended that financial appraisals be undertaken to understand the viability of the schemes, what viability gap might exist and what funds, design changes, etc. may be needed to fill that gap. Finally, clarification is needed on what further land may need to be removed from Green Belt, to secure the full development.
 - *Lancashire (BAE Warton) Enterprise Zone, Fylde* – It is recommended that Fylde Borough Council engage with the current masterplanning process to clarify the scale and nature of the strategic employment land supply which could be made available, the access and other infrastructure requirements of the development land and who, with what funding, will be responsible for opening up the site for development and marketing the location. Also, Fylde Borough Council should seek clarification on what land will be required for BAE Systems, and its suppliers, and what land could be made available to a broader range of relevant businesses.

- *Hillhouse Enterprise Zone, Wyre* – The new masterplan, currently under development, should clarify the amount of development land available here to meet local and strategic E(g), B2, B8 needs. It is also recommended that masterplanning work include delivery planning for the road infrastructure required to fully open up the site identifying the timetable for delivery, who has responsibility for development and supported by what funding sources. Financial appraisals could usefully consider the viability of key schemes, with infrastructure costs allowed for and, if a viability gap exists, how that could be addressed.
- **Recommendation 7 – Meeting Needs – Land Recycling, Infill Developments and Large Employer Growth** – That Local Plan Policy, in Blackpool, Fylde and Wyre, is supportive of such E(g)/B2/B8 developments, re-uses, etc., typically on smaller or medium-sized sites, which will provide either local business properties or options for larger business growth. Small site schemes which link to areas of high housing growth should be particularly encouraged to link homes and employment opportunities.
- **Recommendation 8 – Meeting Needs – Encouraging Rural Diversification** – A rural diversification policy is recommended in Fylde and Wyre Local Plan Policy which indicates support for E(g)/B2/B8 developments which are appropriate to their location.
- **Recommendation 9 – Existing Employment Areas to be Retained** – That the outstanding Employment Areas continue to receive protection in the Local Plans, particularly those graded A-B, but also recognising that those graded C-D continue to make an important contribution to the local economy.
- **Recommendation 10 – Skills Development** – That the three Councils continue to work through relevant public skills bodies, to support improvement in sub-regional skills provision, particularly in engineering and technical sectors.
- **Recommendation 11 – Benefiting from the Green Economy** – Capturing a share of green growth locally will require investment in a high quality property offer at strategic locations on the Fylde Coast, specifically:
 - Hillhouse Enterprise Zone, Wyre – Recognise Hillhouse is emerging as a centre for low carbon energy generation, storage and related infrastructure.
 - Blackpool Airport Enterprise Zone, Blackpool/Fylde and BAE Warton Enterprise Zone (Lancashire Enterprise Zone), Fylde – Low carbon industries and low carbon energy generation should be encouraged and supported here. The provision of high quality industrial units, capable of accommodating the

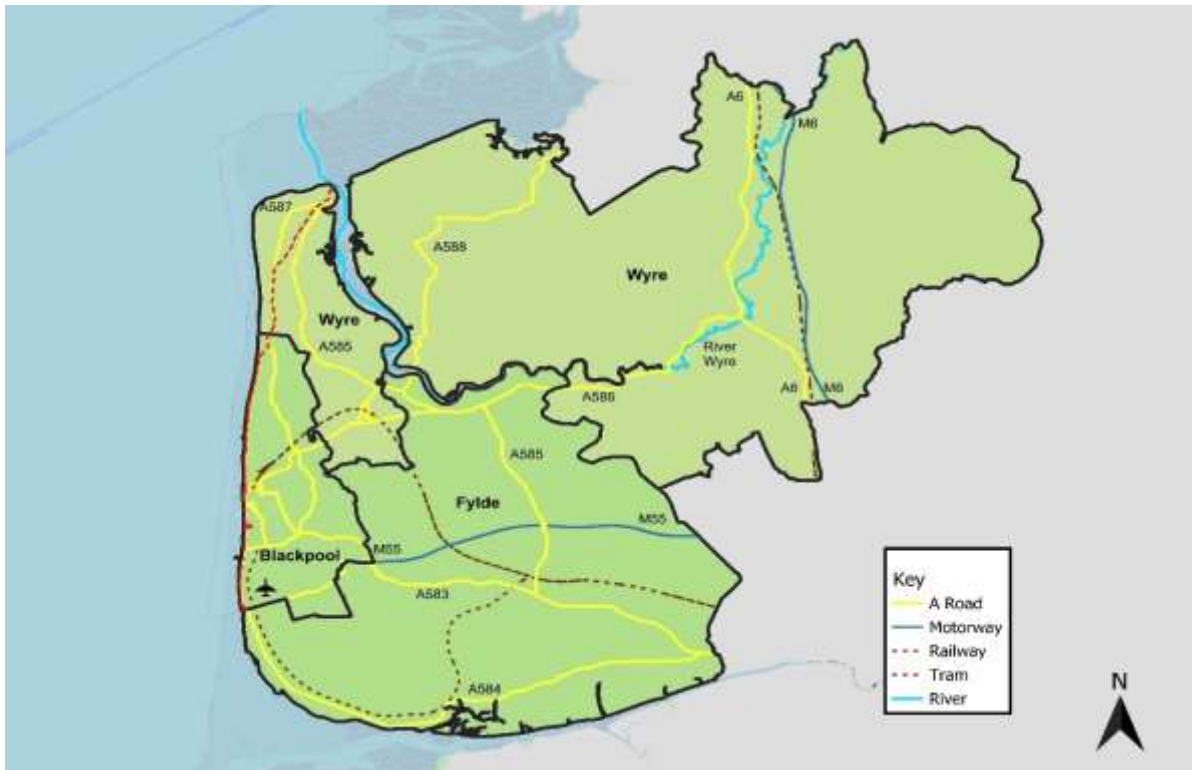
advanced manufacturing elements of the Green Economy should be encouraged.

- Capturing the IT and consultancy elements of the Green Economy will require the provision of good quality, flexible office space. In this regard the Knowledge Quarter scheme at Blackpool Airport Enterprise Zone will be key and partners should work to ensure this proposal is realised, subject to viability constraints.
- Westinghouse, Springfield, Fylde – A major employer and facility for low carbon growth. Plans for growth and expansion of operations here or the growth of supply chain companies looking to locate to/grow within Springfield, should be encouraged.
- **Recommendation 12 – Monitoring Arrangements** – Monitor the full range of gains and losses which occur in the E(g), B2, B8 stock.
- **Recommendation 13 – Future Reviews** – Review and monitor the employment land and premises position and undertake the study again in about five years.
- **Recommendation 14 – Maintain Awareness of External Influences** – The Councils should continue to work with neighbouring authorities on issues in which interests will overlap.

1.0 INTRODUCTION

- 1.1 This report provides an Economic Needs Update and Employment Land Review (ELR) for the Fylde Coast (see Figure 1). It has been carried out on behalf of Blackpool Council (Blackpool), Fylde Borough Council (Fylde), and Wyre Borough Council (Wyre).

Figure 1 – Study Area



Source: BE Group, 2024

- 1.2 The Localism Act 2011 introduced a Duty to Co-operate (DtC) on strategic cross boundary issues. Employment is a strategic issue with cross boundary implications identified in the Fylde Coast Authorities' Memorandum of Understanding (2015) due to the functional economic market area of the Fylde Coast Peninsula. The Local Plans of the Fylde Coast authorities are all now under review. The three plans will be separate, but as far as possible, aligned. In accordance with the Duty to Co-operate, the three authorities are looking to collaborate and undertake joint working where appropriate.

- 1.3 Capita and BE Group have been commissioned to undertake the ELR which will form a critical part of the economic evidence base informing the Local Plan for each of the three local authorities.
- 1.4 The study will establish land requirements and policy imperatives in relation to employment land classes E(g)(i) offices, E(g)(ii) research and development (R&D), E(g)(iii) light industrial, B2 and B8. It will determine the three local authority areas' overall economic development land needs to 2042, informing their respective Local Plans. The Study was completed over September 2023 – February 2024.

STUDY AIM AND OBJECTIVES

- 1.5 The Aim of the Study, as set out in the Study Brief, is to:

Provide a supporting technical evidence base to inform strategy, policy and proposals in Blackpool, Fylde and Wyre's new Local Plans to promote sustainable economic development and employment.

- 1.6 The Objectives of the Study, again as stated in the Brief, are to:
- Provide a robust economic update which meets the requirements of NPPF and PPG and is capable of withstanding scrutiny and challenge at Examination;
 - To provide an updated economic baseline for the Fylde Coast sub-regional area and Blackpool, Fylde and Wyre individual authority areas;
 - To provide an objective review of the area's strengths, weaknesses/absences, opportunities and threats and the potential future role and function of the Fylde Coast sub-region and Blackpool, Fylde and Wyre economies to 2042 and for this to include the economic opportunities from a green economy;
 - To evaluate the role, importance and contribution of existing business estate and employment areas in continuing to meet employment needs, with recommendations regarding those that should be designated for protection for future employment use;
 - To propose realistic future economic scenarios to 2042 in terms of employment sectors, job numbers and type to inform the future employment growth strategies for Blackpool, Fylde and Wyre individual authority areas;

- To establish the current employment land provision and future employment land needs requirement for the period 1st April 2022 to 31st March 2042 for each of the economic scenarios in both quantitative and qualitative terms for each individual authority areas;
- In broad terms to understand the climate change impact of the alternative economic scenarios and the land requirement implications;
- Recommended policy measures for each authority area that respond to the findings of the study;
- A practical framework to facilitate future updates of the analysis of employment need.

1.7 As part of the Study, the following locally specific issues should be considered:

- The opportunities for employment growth across the advanced engineering and manufacturing (AEM) sector within the three Enterprise Zones (EZ) in the sub-region (Blackpool Airport, Hillhouse Technology in Wyre, and BAE Systems at Warton)
- Nuclear processing at Westinghouse, Springfields; the Department for Work and Pensions, and shared infrastructure including Blackpool Airport, coastal tramway, and strategic highway and rail networks
- Prevalence of the manufacturing industry in Fylde, mostly based at BAE systems
- The Blackpool-Fylde Periphery, including the Blackpool Airport Corridor and the Blackpool Airport EZ, straddling the Blackpool/Fylde boundary
- Wyre comprises of three separate sub-markets – the A6 Corridor, Wyre Peninsula, and Rural Areas – all with different functions and specialisms

BACKGROUND

1.8 The Fylde Coast Authorities (FCAs) – Blackpool Council, Fylde Borough Council, and Wyre Borough Council – understand that employment is a strategic issue with cross boundary implications, identified in the Fylde Coast Authorities’ Memorandum of Understanding (2015) due to the functional economic market area of the Fylde Coast peninsula.

1.9 The Memorandum of Understanding sets out the need to “*undertake joint consideration of future employment development for the sub-region in response to the strong links between the FCAs in terms of travel to work patterns and employment.* Also, to:

- *Agree the sub-regional employment land requirement;*
- *Agree the strategic priorities for land use with the aim of attracting major new*

economic development to help strengthen the Fylde Coast economy;

- *Promote sustainable solutions at key strategic sites and corridors:*
 - *Blackpool Airport corridor – Blackpool/Fylde boundary including newly designated Enterprise Zone*
 - *The Enterprise Zone at BAE Systems – Warton – Fylde*
 - *Hillhouse International Business Park – Wyre*
 - *Central Business District – Blackpool Town Centre*
 - *Junction 4 of the M55 – Fylde/Blackpool boundary*
 - *A6 Corridor/Garstang – Wyre.”*

METHODOLOGY

- 1.10 Research methods used include face-to-face and telephone interviews with property market stakeholders such as developers, investors and their agents. Consultations were undertaken with a number of the three authorities’ major private sector employers and key public sector agencies, where possible. Desktop analysis of national, sub-regional, and local reports and strategies have also been undertaken. The socio economic sections incorporate details from historic data to 2021, and forecast data to 2042, as provided by Cambridge Econometrics.
- 1.11 The property market in the local authority areas of the Functional Economic Market Area (FEMA) of the Fylde Coast have been reviewed. This has been undertaken through consultations with officers from the relevant Councils, as part of the Duty to Cooperate, combined with desktop analysis of the Employment Land Studies and Local Plans of those local authorities. Understanding the supply and demand of employment land and premises in neighbouring areas is important in assessing their impact on the Fylde Coast’s land and property markets.
- 1.12 Finally, the land supply for all local authorities has been assessed against forecast data to understand the future need for any additional employment land. This is then developed into a series of economic development recommendations that cover not just land, but also premises.
- 1.13 A list of those consulted is provided as Appendix 1 to the Study.

2.0 STRATEGIC AND POLICY CONTEXT

INTRODUCTION

- 2.1 This section focuses on national, regional and local reports and strategies that have a relevance to the allocation and need for employment land and premises.
- 2.2 Please note that documents and web resources which provide socio-economic statistics on the sub-region, such as Lancashire County Council Area Profiles, will inform Section 3.0 which provides a comprehensive and up to date Socio-Economic profile of the Fylde Coast and the three local authority areas individually. To avoid confusion and duplication of findings, documents which provide historic socio-economic analyses of Fylde Coast Local Authority Areas, and do not also provide policy and programme strategy, are not reviewed here. Examples of such documents include The State of Blackpool (2008), The Blackpool Local Economic Baseline (2011) and the State of Wyre (2021).
- 2.3 Additionally, strategies relating to Blackpool, Fylde and Wyre’s neighbouring authorities are included in Section 6.0 on the Functional Economic Market Area. Data from relevant Authority Monitoring Reports is incorporated into Objectively Assessed (Economic) Needs (OAN) forecasting undertaken in Section 8.0. Finally, issues of climate change, outside of the main references in planning and regeneration policy will be considered separately throughout the report.

NATIONAL PLANNING POLICY

- 2.4 This sub-section considers national policy and planning practice guidance, relevant to the completion of this Economic Needs Update and Employment Land Review.

National Planning Policy Framework (NPPF), December 2023

- 2.5 The Framework sets out planning policies for England and the ways in which they should be applied. The introduction states that it *“provides a framework within which locally-prepared plans can provide for sufficient housing and other development in a sustainable manner.”* The NPPF must be considered when developing local authority development plans and remains a material consideration in planning decisions.

- 2.6 Section 2 ‘Achieving Sustainable Development’ notes that *“The purpose of the planning system is to contribute to the achievement of sustainable development, including the provision of homes, commercial development, and supporting infrastructure in a sustainable manner. At a very high level, the objective of sustainable development can be summarised as meeting the needs of the present without compromising the ability of future generations to meet their own needs”* (Paragraph 7).
- 2.7 Three overarching objectives are given to help the planning system achieve sustainable development. Most relevant here is the economic objective (Objective a) which requires that planning policy and practice *“...help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved”* (Paragraph 8).
- 2.8 Planning should also operate with a presumption in favour of sustainable development (Paragraph 11). For plan making, this means:
- *“a) all plans should promote a sustainable pattern of development that seeks to: meet the development needs of their area; align growth and infrastructure; improve the environment; mitigate climate change (including by making effective use of land in urban areas) and adapt to its effects*
 - *b) strategic policies should, as a minimum, provide for objectively assessed needs for housing and other uses, as well as any needs that cannot be met within neighbouring areas, unless:*
 - i. the application of policies in this Framework that protect areas or assets of particular importance provides a strong reason for restricting the overall scale, type or distribution of development in the plan area or*
 - ii. any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole.”*
- 2.9 The Framework also now requires local plans to look 30 years ahead where large-scale development forms part of the areas strategic policy, *“to take into account the likely timescale for delivery”* (Paragraph 22).

2.10 Section 6 ‘Building a strong, competitive economy’ indicates that *“Planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development. The approach taken should allow each area to build on its strengths, counter any weaknesses and address the challenges of the future. This is particularly important where Britain can be a global leader in driving innovation, and in areas with high levels of productivity, which should be able to capitalise on their performance and potential”* (Paragraph 85).

2.11 To achieve this *“Planning policies should:*

- *a) set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration*
- *b) set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period*
- *c) seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and*
- *d) be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices (such as live-work accommodation), and to enable a rapid response to changes in economic circumstances”* (Paragraph 86).

2.12 Additionally, *“Planning policies and decisions should recognise and address the specific locational requirements of different sectors. This includes making provision for clusters or networks of knowledge and data-driven, creative or high technology industries; and for storage and distribution operations at a variety of scales and in suitably accessible locations.”* (Paragraph 87).

2.13 To support a prosperous rural economy *“Planning policies and decisions should enable:*

- *a) the sustainable growth and expansion of all types of business in rural areas, both through conversion of existing buildings and well-designed, beautiful new buildings*
- *b) the development and diversification of agricultural and other land-based rural businesses*
- *c) sustainable rural tourism and leisure developments which respect the character of*

the countryside; and

- *d) the retention and development of accessible local services and community facilities, such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship” (Paragraph 88).*

2.14 To achieve sustainable development, it is recognised that *“Sites to meet local business and community needs in rural areas may have to be found adjacent to or beyond existing settlements, and in locations that are not well served by public transport.”* Development on such sites needs to be sensitive to its surroundings, not have an unacceptable impact on local roads and maximising any opportunities to make a location more sustainable. (Paragraph 89).

2.15 Section 7 ‘Ensuring the Vitality of Town Centres’ notes that *“Planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation.”* In particular, *within clearly defined town centres and primary shopping areas, policies should “allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary.”*

2.16 *“Where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre”* (Paragraph 90).

2.17 *“Local planning authorities should apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered”* (Paragraph 91). *“When considering edge of centre and out of centre proposals, preference should be given*

to accessible sites which are well connected to the town centre” (Paragraph 92). This approach “should not be applied to applications for small scale rural offices or other small scale rural development” (Paragraph 93).

2.18 Section 11 on making ‘Effective Use of Land’ encourages the reallocation of land *“where the local planning authority considers there to be no reasonable prospect of an application coming forward for the use allocated in a plan.”* Specifically, local planning authorities should:

- *“...as part of plan updates, reallocate the land for a more deliverable use that can help to address identified needs (or, if appropriate, deallocate a site which is undeveloped); and*
- *In the interim, prior to updating the plan, applications for alternative uses on the land should be supported, where the proposed use would contribute to meeting an unmet need for development in the area” (Paragraph 126).*

2.19 *“Local planning authorities should also take a positive approach to applications for alternative uses of land which is currently developed but not allocated for a specific purpose in plans, where this would help to meet identified development needs. In particular, they should support proposals to:*

- *“use retail and employment land for homes in areas of high housing demand, provided this would not undermine key economic sectors or sites or the vitality and viability of town centres, and would be compatible with other policies in this Framework...” (Paragraph 127).*

2.20 Additionally, planning policy should *“promote and support the development of under-utilised land and buildings, especially if this would help to meet identified needs for housing where land supply is constrained and available sites could be used more effectively (for example converting space above shops, and building on or above service yards, car parks, lock-ups and railway infrastructure)” (Paragraph 124).*

2.21 Section 14 considers issues of Climate Change. In Paragraph 158 it is noted that *“Plans should take a proactive approach to mitigating and adapting to climate change, taking into account the long-term implications for flood risk, coastal change, water supply, biodiversity and landscapes, and the risk of overheating from rising temperatures. Policies should*

support appropriate measures to ensure the future resilience of communities and infrastructure to climate change impacts, such as providing space for physical protection measures, or making provision for the possible future relocation of vulnerable development and infrastructure.”

2.22 New development should be planned for in ways that:

- *“a) avoid increased vulnerability to the range of impacts arising from climate change. When new development is brought forward in areas which are vulnerable, care should be taken to ensure that risks can be managed through suitable adaptation measures, including through the planning of green infrastructure; and*
- *b) can help to reduce greenhouse gas emissions, such as through its location, orientation and design. Any local requirements for the sustainability of buildings should reflect the Government’s policy for national technical standards”* (Paragraph 159).

2.23 Planning should also help to increase the use and supply of renewable and low carbon energy and heat.

Use Class Order Amendments, September 2020

2.24 As of September 2020, changes have been made to the Use Classes Order which mean that Use Classes A1, A2, A3 and B1 are now to be treated as Class E. The B1 class has been changed to E(g) and defined as “ [Employment] *Uses which can be carried out in a residential area without detriment to its amenity.*” E(g) is further separated into three sub-categories which reflect the previous a, b, c division of the B1 Use Class:

- E(g)(i): Offices to carry out any operational or administrative functions (former B1(a))
- E(g)(ii): Research and development of products or processes (former B1(b))
- E(g)(iii): Industrial processes. (former B1(c)).

2.25 Class D (Non-residential Institutions, and Assembly and Leisure) has also been redefined to newly introduced Classes E and F, with Class F comprising of Local Community and Learning premises. D1 is split out and replaced by the new Classes E(e-f) and F1. D2 is split out and replaced by the new Classes E(d) and F2(c-d) as well as several newly defined ‘Sui Generis’ uses, including:

- Pubs, wine bars and other drinking establishments (including those with expanded food provision) (Former A4)

- Hot food takeaways (Former A5)
 - Live music venues
 - Cinemas, concert halls, bingo halls and dance halls.
- 2.26 The residential (C classes), general industrial (B2) and storage and distribution (B8) use classes remain unchanged.
- 2.27 The E Class brackets together a wide variety of uses, all of which are now considered to be in the same use class:
- Retail
 - Restaurants
 - Financial, professional or other commercial services
 - Publicly accessible indoor sport, recreation or fitness
 - Publicly available medical or health services
 - Crèches, day nurseries and day centres
 - Offices, including research and development
 - Industrial uses which do not harm amenity.
- 2.28 Planning permission is not required for changes of use within the same use class, including the new E Use Class, unless local planning authorities create some locally specific restrictions in local policy. This means that many types of business user will be able to change the uses of properties without seeking planning permission. For example, under the new use class order, a shop will be able to change to an office and then to a gym and back again, without planning permission. Amongst other impacts, this will make it more difficult for local planning authorities to monitor changes of use within local commercial premises as there is no longer an automatic requirement for property owners/occupiers to engage with councils when making permitted changes.
- 2.29 In order to change the uses within a class, there must have been actual and lawful use (i.e. if the building is not being used or occupied for the use permitted under an existing planning permission, it will need to be brought into that use before it can then change to another use within Class E).

- 2.30 The government has said that the main driver of the changes has been the need to enable a repurposing of buildings on high streets and town centres. The new Class E allows for a mix of uses to reflect changing retail requirements. It will allow a building to be used flexibly by having a number of uses taking place concurrently or by allowing different uses to take place at different times of the day. The aim is for this to support the high street revival and allow greater flexibility to change uses within town centres without the need for planning permission.
- 2.31 The Government has also implemented separate changes to permitted development rights. These include allowing the demolition and rebuilding of single and detached vacant and redundant office and light industrial buildings into dwellings, without planning permission subject to a number of restrictions and limitations set out in the General Permitted Development Order.
- 2.32 To implement this will require prior approval from the local authority prior to commencement of the development. This includes approval in respect of transport and highway matters, contamination risks, flood risk, the design of the new building, the external appearance of the new building, the provision of adequate natural light in all habitable rooms of the new dwellings, impact on amenity of the existing building and neighbouring premises including overlooking, privacy and loss of light, impact of noise from commercial premises on intended occupiers, impact upon heritage and archaeology, method of demolition of the old building, plans for landscaping, air traffic and defence asset impacts, and the impact on any protected vistas.
- 2.33 For the Fylde Coast, the practical effects are likely to include:
- Some impacts on the supply of town centre office stock, with some properties converted from office to retail, leisure and other town centre services. This is likely to be a pressure in Blackpool, St Annes and Lytham town centres although the national retail/leisure market remains suppressed following the Covid-19 Pandemic and ongoing economic uncertainty.
 - This new flexibility has no spatial considerations and therefore will apply outside of town centres as well. It thus has the potential to result in the introduction of non-office type activities, including retail, in out of centre business parks, which runs contrary to national and local planning policies designed to protect town/city centre retail. This

may impact on a range of existing and proposed business park schemes in Blackpool, Fylde and Wyre.

- Some conversion of light industrial stock to retail/leisure uses is likely, on sites with good main road access, or in settlement locations, particularly as retail/leisure uses may be able to pay higher rents than traditional industrial and warehouse businesses. However, this largely continues existing trends which have seen uses such as gyms be accommodated on industrial estates. On a small scale such conversions can be welcome as they deliver useful services on local industrial estates, generate footfall outside of normal business hours, provide viable uses for older stock and increase the attractiveness of estates to occupiers. Large scale conversions would have a significant impact on the stock available to meet the needs of industrial and warehouse businesses and create incompatibilities between uses (i.e. retail next to heavy industry) although in the short term, a depressed retail/leisure market makes extensive losses unlikely.
- 2.34 There will also be policy impacts as Local Plan policies which seek to protect specific uses in the town centre, or office space within designated areas, will no longer be up to date.
- 2.35 Landlords will also need to be particularly aware of the new arrangements when looking at leases and the extent of use that is authorised. Allowing too broad a permitted use could now result in undesirable changes of use within the scope of the lease, and landlords will not be able to fall back on the planning system to prevent such changes.
- 2.36 The changes will also have an impact on property valuation. For example, a property which had achieved a desirable change of use may now find that any such extant permission is unnecessary and does not result in an uplift in value. Similarly, there is likely to be a levelling-out of values for properties within the new use class, given the interchangeability of uses therein.

Employment Land Review Guidance Notes

- 2.37 Planning Practice Guidance (PPG) provides guidance on how local authorities should approach both housing and employment land reviews. Two guidance notes were produced in 2014 and updated over 2018/19 – *Housing and Economic Land Availability Assessment* which provides a methodology of reviewing suitable land, and *Housing and Economic Needs Assessments*, which provides guidance on how future needs can be determined. A third PPG *Effective Use of Land* (2019) provides advice on assessing whether existing employment allocations should be protected or reallocated for a more deliverable use.
- 2.38 The assessment process takes the form of a five-stage methodology under the following headings:
- **Stage 1: Identification of sites and broad locations** to provide an audit of available land of 0.25 ha and above. This will be a review identifying as wide a range as possible of sites and broad locations for development (including those existing sites that could be improved, intensified or changed). Identification methods may include a public ‘Call for Sites’ exercised by the local planning authority. The outcome of this stage is to understand key employment land supply issues and generate a portfolio of potential employment sites to take forward for more detailed review.
 - **Stage 2: Site/broad location assessment** to estimate the development potential. This will include a re-appraisal of the suitability of previously allocated land, and the potential to designate allocated land for different or a wider range of uses. This stage entails a qualitative review of all significant sites and premises for their ‘suitability’, ‘availability’ and ‘achievability’ in order to confirm which of them are unsuitable for/unlikely to continue in B1 (now Class E(g)) /B2/B8 employment use; to establish the extent of ‘gaps’ in the portfolio; and if necessary, identify additional sites to be allocated or safeguarded. This exercise will help to inform whether a site is ‘deliverable’, ‘developable’ or neither. In assessing the portfolio, factors which need to be considered include:
 - *“The best fit functional economic market area*
 - *The existing stock of land within the area - this will indicate a baseline for land in employment uses*
 - *The recent pattern of employment land supply and loss – for example based on extant planning permissions and planning applications (or loss to permitted development)*

- *Market demand – sourced from market intelligence from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums including locational and premises requirements of particular types of business*
- *Market signals – based on projected growth in the certain markets and demographic changes, and*
- *Oversupply and evidence of market failure – such as physical or ownership constraints that prevent the employment site being used effectively.”*
- When considering whether there is a realistic prospect of an existing employment site being developed for its intended use, PPG *Effective Use of Land* suggests that the following factors be taken into account:
 - *“The length of time since the site was allocated in the development plan;*
 - *The planning history of the site including any planning applications or pre-application enquiries;*
 - *Whether there is evidence that the site has been actively marketed for its intended use for a reasonable period, and at a realistic price; and*
 - *Whether there are any changes of circumstance that mean that take-up of the site for its intended use is now unlikely.*
- *Where an alternative use for the allocated site is proposed, it will also be relevant to consider the extent to which evidence suggests the alternative use would address an unmet need, as well as the implications for the wider planning strategy for the area and other development plan policies.”*
- **Stage 3: Windfall assessment** Not applicable as relates to housing only.
- **Stage 4: Assessment review** ascertaining the need for economic development uses. To understand the future quantity of land required across the main business sectors; to provide a breakdown of that analysis in terms of quality and location and provide an indication of ‘gaps’ in supply through economic forecasting, consideration of recent trends and/or assessment of local property market circumstances. Preferred forecast methods include:
 - *“Sectoral and employment forecasts and projections (labour demand)*
 - *Demographically derived assessments of future employment needs (labour supply techniques)*
 - *Analysis based on the past take-up of employment land and property and/or future property market requirements.”*

- 2.39 This is combined with “*consultation with relevant organisations, studies of business trends, and monitoring of business, economic and employment statistics.*”
- 2.40 The outcome of this stage is to provide broad quantitative employment land requirements across the principal market segments covering the Borough’s Local Plan period and an analysis of the likely ‘gaps’ in supply that need to be filled.
- **Stage 5: Final evidence base**, the outcome of which will be the completion of the employment land review, to be taken forward in the Local Plan. The Employment Land Needs Study is prepared in line with this advice.
- 2.41 Table 1 shows how the Employment Land Needs study aligns with this Guidance. The link between the report and the PPG methodology is not always clear cut, with different sections overlapping, indeed certain steps overlap.

Table 1 – Employment Land Reviews – PPG Guidance

Stage 1 – Site / Broad Location Identification	
Desktop review of existing information	Review of the policy position, socio-economic position, local/sub-regional property market and the 2023 land supply. (Covered in Sections 3-7)
Call for sites / broad locations	Call for Sites exercises completed internally by councils. Relevant sites reviewed in Section 9
Site / broad location survey	Review of available employment sites. Broad locations to meet future land needs completed in Conclusions and Recommendations. (Covered in Sections 7, 10-11)
Stage 2 – Site / Broad Location Assessment	
Estimating the development potential in parallel with assessing suitability, availability, achievability – including viability	Covered in Section 7 and Appendices
Overcoming constraints	Covered in Section 7 and Appendices
Stage 3 – Windfall Assessment	
Determine housing / economic development potential of windfall sites (where justified)	N/A
Stage 4 – Assessment Review	
Review assessment and prepare draft trajectory; enough sites / broad locations?	Section 8
Stage 5 – Final Evidence Base	
Step 12 – Evidence Base and monitoring	Employment Land Needs Study produced by BE Group/Capita and monitoring undertaken by councils

Source: BE Group, 2023

2.42 Finally, the PPG ‘Climate Change’ (2019) identified some of the methods for mitigating climate change, by reducing emissions, which can be supported through Local Plans:

- *“Reducing the need to travel and providing for sustainable transport*
- *Providing opportunities for renewable and low carbon energy technologies*
- *Providing opportunities for decentralised energy and heating*
- *Promoting low carbon design approaches to reduce energy consumption in buildings, such as passive solar design.”*

2.43 Specific examples of how to include such factors in planning decision making would include:

- *“Considering future climate risks when allocating development sites to ensure risks are understood over the development’s lifetime*
- *Considering the impact of and promoting design responses to flood risk and coastal change for the lifetime of the development*
- *Considering availability of water and water infrastructure for the lifetime of the development and design responses to promote water efficiency and protect water quality*
- *Promoting adaptation approaches in design policies for developments and the public realm.”*

NATIONAL/REGIONAL ECONOMIC POLICY

2.44 This sub-section considers key economic policy and programmes, relevant to the completion of this Employment Land Needs Study.

Build Back Better: Our Plan for Growth, 2021

2.45 The Build Back Better Programme looked to stimulate economic growth particularly outside of London and the South East, in the light of the various economic shocks which have occurred since 2020, including Brexit and the Lockdowns associated with the Covid-19 Pandemic. It linked to the Government’s levelling up agenda for the whole of the UK, supporting a transition to net zero, and supporting the vision for Global Britain. It was based on three core pillars of growth:

Infrastructure

- Stimulating short-term economic activity and driving long-term productivity improvements via investment in broadband, roads, rail and cities, through capital spending
- Connecting people to opportunity via the Levelling Up Funds and UK Shared Prosperity Fund, as well as the Towns Fund and High Street Fund, to invest in local areas
- Helping achieve net zero via £12 billion of funding for projects through the Ten Point Plan for a Green Industrial Revolution
- Supporting investment through the UK Infrastructure Bank which will invest in local

authority and private sector infrastructure projects, as well as providing an advisory function to help with the development and delivery of projects.

Skills

- Support productivity growth through high-quality skills and investment in training
- Introduce the Lifetime Skills Guarantee to enable lifelong learning through free fully funded Level 3 courses, rolling out employer-led skills bootcamps, and introducing the Lifelong Loan Entitlement
- Investment in apprenticeships.

Innovation

- Support and incentivise innovation and investment in innovation, through programmes such as British Patient Capital, and a new £375 million Future Fund: Breakthrough
- Develop the regulatory system in a way that supports innovation
- Attract the brightest and best people
- Support small and medium-sized enterprises (SMEs) through two new schemes to boost productivity: Help to Grow: Management, a new management training offer, and Help to Grow: Digital, a new scheme to help 100,000 SMEs adopt productivity-enhancing software.

2.46 Programmes such as the UK Shared Prosperity Fund and the UK-wide Levelling Up Fund will be used to regenerate struggling towns in all parts of the UK and ensure every UK region and nation has at least one globally competitive city at its heart to help drive prosperity. Programmes will strengthen regional centres of excellence by ensuring digital and transport connectivity, by establishing a new UK Infrastructure Bank in the North of England and by relocating 22,000 Civil Service roles out of London. Freeports are also proposed including a Liverpool City Region Freeport with facilities in the Wirral, Widnes and around Junction 22, M6.

2.47 Investment is also proposed in Net Zero programmes which will support up to 60,000 jobs in the offshore wind sector, 50,000 jobs in carbon capture, usage and storage (CCUS) and up to 8,000 in hydrogen in our industrial clusters. Government will work with industry to generate 5GW of low carbon hydrogen production capacity and capture 10 Mt CO₂/year using CCUS by 2030. Programmed investment at the Hillhouse Enterprise Zone, in Wyre,

in renewable energy generation will support this, something discussed further in Sections 5.0 and 7.0.

Industrial Strategy: Building a Britain Fit for the Future, 2017

- 2.48 The National Government document ‘Industrial Strategy: Building a Britain Fit for the future (2017)’ was withdrawn on 1st March 2023. Its policies and proposals have been transitioned into the above Build Back Better Document.

The Northern Powerhouse Independent Economic Review, 2016

- 2.49 Reflecting identified GVA and productivity gaps, in August 2014, the Chancellor set out a vision to better connect the North of England and for it to become ‘one Northern Powerhouse’, acting together to drive economic outcomes greater than the sum of its parts. The Chancellor’s announcement was followed by commitments to devolve further powers to the North (and elsewhere). The Autumn Statement in late 2015 then defined a range of investments in the North’s science and business base to boost productivity performance and encourage a ‘rebalancing’ of the UK’s economy. Against this background the Independent Economic Review (IER) considered the economic issues and growth potential of the North of England.

- 2.50 The North’s ‘performance gap’ (measured by GVA per capita) was persistent and entrenched. Its GVA per capita has consistently been some 25 percent below the rest of England, and 10-15 percent below the average when London was excluded, a gap which had been widening since the early 2000s. The ‘gap’ was primarily a difference in productivity and skills, which reflects under-investment, low enterprise rates, a lack of agglomeration and poor connectivity, compared to benchmarks.

- 2.51 Against these constraints, the North of England has a number of sectoral advantages in industrial sectors including:

- Advanced Manufacturing, with a particular focus on materials and processes
- Energy, in particular expertise around generation, storage, and low carbon technologies and processes, especially in nuclear and offshore wind
- Health Innovation, with a focus on Life Sciences, Medical Technologies/Devices, e-health
-

- Digital, focusing in particular on computation, software tools/design and content, data analytics, and simulation/modelling, and wider strengths in media.
- 2.52 These were the ‘Prime Capabilities’ of the region and will be ‘enabled’ by growth in Financial and Professional Services, Logistics, and Education (primarily Higher Education).
- 2.53 A ‘transformational’ economic future for the North, in which there were substantial improvements in the skills base, in innovation performance, and in transport connectivity, would lead to GVA growth some 15 percent or £97 billion, above the baseline by 2050. A transformational future would deliver a 4 percent increase in productivity and some 850,000 additional jobs by 2050. Such growth would be led by an improving offer of ‘prime’ capabilities, supported by the contribution of key ‘enabling’ capabilities. Many of the additional jobs are likely to come in city and town-based services, including those that benefit from the population’s higher spending power, helping to improve the North’s employment rate. These services will also see some productivity improvements.
- 2.54 To achieve this growth, and close the gap, substantial improvements in the skills base and graduate retention and attraction, innovation performance, and inward investment are necessary across the North. Transformational improvements to the North’s transport connectivity, notably rail links, are also critical, both between and within cities.

SUB REGIONAL ECONOMIC POLICY

- 2.55 Relevant economic policy documents produced by Lancashire County Council and the Lancashire Local Enterprise Partnership (LEP), are reviewed here.

Lancashire 2050 – A strategic framework for Lancashire – Lancashire County Council and Lancashire Local Authorities (Ongoing)

- 2.56 Lancashire 2050 is a shared vision for growth in the county amongst the County Council and the 15 constituent local authorities. It is based on the vision that:
- “Our ambition is for Lancashire to be seen across the world as the best place to make a home, raise a family, develop a career, do business and grow old. A place made up of communities everyone is proud of, that celebrates our sense of place, heritage and natural environment. A place where we always look to the future.”*

2.57 The plan for achieving this vision is organised around eight priority areas:

- *“Economic prosperity – Succeed as a globally recognised, competitive and sustainable economy, distinguished by its quality of life, connectivity and access to opportunities.*
- *Environment and climate – Meet our low carbon ambitions, promote clean energy and enhance our rich natural environment.*
- *Transport and infrastructure – Become better-connected and accessible, with infrastructure that links opportunities to need, and travel choices that are safe, inclusive, affordable and low carbon.*
- *Housing – Deliver decent and affordable housing for every community. High quality housing will benefit existing residents, as well as attract and retain the people required to drive the economy over the long term.*
- *Early years and education – Support all our children so they are ready to learn, achieve, and can access opportunity.*
- *Health and wellbeing – Improve health, life chances and independence, so residents can live healthy lives and access quality care when they need it.*
- *Employment and skills – Support people to develop skills throughout their lives and attract business to the county because of our high skilled workforce.*
- *Communities and place – Build pride, belonging, and resilience in all our diverse communities and ensure people have a voice and stake in Lancashire’s future.”*

2.58 This strategic framework will be endorsed by the local authorities, other key stakeholders and align with the organisational priorities of Lancashire County Council. Action Plans will be developed around the above themes to make cases for extra tools, powers and resources to central government. Further discussion on Lancashire 2050, with County Council stakeholders is included at Section 5.0.

Lancashire County Council Economic Strategy 2023-2025 – Lancashire LEP, 2023

2.59 Looking at the main priorities or changes in approach envisaged over the period to 2025, the following three core priorities and activities were set out in this Economic Strategy:

- **Strategic development and connectivity**
 - A multi-billion strategic development and infrastructure pipeline of active projects to leverage further investment, supporting job creation, regeneration and connecting people and business to the opportunities

- Champion multi-district regeneration programmes and investment opportunities
- Secure and build on a comprehensive roll out of digital gigabit connectivity to support business and communities across Lancashire.
- **Business support**
 - Business support, focused on areas of highest impact and delivered in partnership with district councils, funded by the UK Shared Prosperity Fund and Lancashire County Council
 - Bring services together to focus on providing coherent innovation support for small and medium sized companies.
 - Refresh and promote updated propositions which set out the strengths and opportunities within the county's key sectors.
- **Skills and talent**
 - To maximise the alignment of careers programmes, education and skills curriculum delivery with the needs of business
 - To better understand and tackle barriers to employment and increase the proportion of economically active people in Lancashire
 - To drive an inclusive and diverse workforce, that is agile and skilled to meet changing demands in digital, tech, cyber and low carbon roles.

2.60 These priorities will inform the action planning for services and progress will be monitored through a broader range of departmental and corporate key performance indicators.

Lancashire Local Skills Improvement Plan (LSIP) – North and Western Lancashire Chamber of Commerce, East Lancashire Chamber of Commerce and the Department for Education, 2022

2.61 This report aimed to provide a qualitative examination of the skills shortages in Lancashire, to assess the true extent of the re-emergence of skills shortages and the underlying factors behind them, and to understand how employers are coping with and responding to them. It identified increasing shortages in the majority of industrial sectors for essential technical skills. Two-thirds of employers surveyed (970 responses were received from companies from across Lancashire) believe their sector is suffering from a shortage of qualified individuals and that such shortages have worsened post the Covid-19 Pandemic.

- 2.62 However, the LSIP also notes that employers, especially larger ones, have become better at sourcing skilled labour and providing in house training to their existing labour. Many employers expressed enthusiasm for the potential role apprenticeships could play in offsetting labour and skill shortages in the future.
- 2.63 Barriers to accessing training, identified by employers, included the time needed to identify skills shortages within businesses, the time it takes to source suitable training and, crucially, the time employees have to take off the job to complete training. The lack of in-house resource and capability to identify skills requirements and source training was also a concern for many organisations. Streamlining identification of skills and courses would therefore be essential to help more employers pursue training for their staff.
- 2.64 Cost is another concern, and the varying methods of funding training can create confusion for employers. Funding is frequently tied to long-term courses and qualifications rather than short term skills improvement programmes. Employers believed that allowing a wider range of courses to attract funding would enable more training to be undertaken, and more efficiently than tying individuals into longer courses than needed.
- 2.65 Other barriers included difficulties with accessing the right training content. Programmes/frameworks were also found to be too generalised, too rigid and failed to address industry requirements. A more flexible approach to delivery with the focus on specific skills would make training much more accessible for employers and learners alike. Trainers, and the courses they teach, also need to keep up to date with current working practices and technologies.
- 2.66 A key requirement for employers would be a central point of contact that could offer signposting, advice, information and skills needs analysis, something recommended by the LSIP.

A new prosperity Final Report: The Final Report of the Lancashire Independent Economic Review – Lancashire Independent Economic Review Partnership, 2021

- 2.67 This report set out the major priorities facing the Lancashire economy, and the actions that can be taken to navigate through a changing but challenging period. It argues that economic improvement is not just about increasing productivity, the gains from greater productivity need to be put in the service of greater prosperity for Lancashire’s people, translating into gains in income, health and wellbeing, and environmental sustainability.
- 2.68 The report was based on a number of themes and the recommendations which result for them. The first theme was Productivity, Innovation, and Work, reflecting differences in Lancashire’s company and workforce productivity. The recommendations relating to this include:
- *Recommendation 1:* Develop Lancashire Grand Challenges for manufacturing, energy and low carbon technologies and health innovation in Lancashire to stimulate network growth and collaboration, helping to improve innovation.
 - *Recommendation 2:* Stimulate innovation through targeted SME funding, reflecting the low levels of SME innovation. It is proposed that innovation be encouraged through a “Missions” or “Grand Challenges” approach – setting out a direction for businesses in Lancashire. New translational research centres, such as AMRC North West, must be at the heart of this approach along with capital grants and loans for productivity improvements.
 - *Recommendation 3:* Focus investment approaches on high value international markets.
- 2.69 The second theme focused on Skills, Education and Health, particularly focusing on early years care, which was found to be deficient in many areas, affecting future potential. The recommendations relating to this include:
- *Recommendation 4:* Increased focus on the early years of life and the many contributors to child poverty. Investment would involve the provision of family hubs across the county to give support to those who need it.
 - *Recommendation 5:* A Good Work Charter for Lancashire. This would increase the quality of jobs across the business base with a focus on income, conditions and skills, building on the good work of the Lancashire Skills Pledge and existing anchor

institutions charters in Lancashire.

- *Recommendation 6:* Develop Lancashire’s lifetime skills guarantee. This would increase the quality of jobs across the business base with a focus on income, conditions and skills, building on the work of the Lancashire Skills Pledge and existing anchor institutions charters in Lancashire.
- *Recommendation 7:* Increase health and work programmes and create a healthy equity fund. This would adopt a systems approach to health and wealth – this should enable local leadership to implement effective approaches to systems planning, bringing together different service areas to provide support.

2.70 The third theme was on housing and resilience. Much of Lancashire’s housing stock is inadequate, with poor insulation linked to high CO2 emissions, fuel poverty and poor health outcomes – and much housing is cramped with multiple occupancies (HMOs). A major housing programme is needed to retrofit existing properties, improve the standards of HMOs, and build attractive properties for the aspirational workforce. The recommendations relating to this include:

- *Recommendation 8:* A major green housing programme.

2.71 The fourth theme looked at Transport, Infrastructure, and Connectivity. A long-term strategy for Lancashire needs to make sure the right kinds of space are provided for business, to make the county competitive, supported by the right transport infrastructure. The recommendations relating to this include:

- *Recommendation 9:* A review of sites for business
- *Recommendation 10:* An East-West connectivity programme to integrate economic corridors and maximise the benefit of HS2, with a focus on electrified rail (longer journeys) and active travel (shorter journeys)
- *Recommendation 11:* A review of the bus market to identify the best way to reverse the decline in bus routes.
- *Recommendation 12:* A full fibre programme to roll out fibre across all of Lancashire.

2.72 The final theme focused on Place, Governance and Capacity ensuring local governance is responsive and effective to achieve the above recommendations. The recommendations relating to this include:

- *Recommendation 13:* Work together to support each town to maximise its

opportunities, using a toolkit to adopt a flexible approach to town centre space, creatively support work uses, and focus on bringing experiences into medium and large towns

- *Recommendation 14: Strengthen combined governance across Lancashire.*

Strategic Economic Plan: A Growth Deal for the Arc of Prosperity and City Deal Implementation Plan 2015-2018 – Lancashire LEP (2014)

2.73 The overarching purpose of the Strategic Economic Plan (SEP) and Growth Deal was to re-establish Lancashire as an economic powerhouse and a national centre of excellence in advanced manufacturing by maximising its clear competitive strengths and capabilities in the aerospace, automotive, energy and health science related sectors.

2.74 A key element of the strategic vision of Lancashire's SEP was to deliver the 'Arc of Prosperity'. The arc of prosperity was an area sweeping across Lancashire which generated around 75 percent of Lancashire's wealth and provided the primary focus of economic and housing growth plans. The SEP therefore concentrated economic activity and Growth Deal investment in this arc.

2.75 In spatial terms, the 'Arc of Prosperity' referred to:

- *"The importance of Lancaster as a major location for economic and housing growth, underpinned by its world-class research intensive university, a renewed city centre, and the prospect of further growth as an energy centre and port serving Lancashire and the wider region*
- *In Wyre and Fylde the truly global excellence of an established base of growing polymer science, nuclear and renewable energy focused companies including AGC, Victrex and Vinnolit*
- *Blackpool remains one of the UK's leading visitor destinations, but it is vital this competitive advantage is further strengthened and its social and economic renewal accelerated*
- *The two Lancashire Enterprise Zone sites at Samlesbury and Warton that are exclusively focused on the growth of advanced manufacturing*

- *Central Lancashire is home to some of the UK's leading automotive companies, including supply chain clusters with companies such as Clean Air Power and Torotrak, and Tier 1 OEM companies including PACCAR (Leyland Trucks)*
- *Preston, the county's largest urban centre, which is also the home to UCLan and the focal point of our City Deal 10-year infrastructure and development programme*
- *The M65 Growth Corridor which forms the economic spine of East Lancashire, and includes, Blackburn as its key gateway location, Burnley, the UK's most Enterprising Area, and Pendle, which has the largest concentration of employment in advanced manufacturing in England.”*

2.76 Delivering the arc of prosperity was central to achieving the LEP's strategic vision, providing a platform from which the SEP's strategic objectives and priorities can be clearly articulated.

2.77 To this end, the LEP's Growth Plan, which was agreed in 2013, provided the foundation for the SEP and Growth Deal with Government. The Growth Deal created the opportunity to focus and accelerate the delivery of key objectives, namely:

- *“Establishing Lancashire as a natural home for high growth companies, with a clear focus on maximising our competitive economic strengths, and a strong private sector business-base to underpin the future prosperity of Lancashire*
- *Reclaiming Lancashire's role as a national centre for advanced manufacturing by realising the potential of the area's strengths and capabilities in aerospace, automotive and energy supply chain sectors, which are amongst the strongest in the UK*
- *Maximising the economic value of Lancashire's centres of research and innovation excellence, and establishing new links with other national centres and globally competitive business clusters located within the arc of prosperity*
- *Refocusing the local skills system to make it more responsive to business skill demands, with local apprenticeship routes made more attractive and accessible to individuals and SME businesses*
- *Strengthening and refreshing Boost, our business growth hub, and improving our strategic marketing capacity to attract new investors and occupiers*
- *Driving forward the Enterprise Zone and City Deal as key engines of economic and housing growth*

- *Creating the right conditions for business and investor growth by extending our Growing Places investment fund, to help unlock new development and employment opportunities across Lancashire*
- *Ensuring major transport projects and investments are fully aligned with the delivery of key economic and housing growth priorities across Lancashire*
- *Developing complementary local growth accelerator strategies focused on change at the sub-area level, creating economic opportunities for local communities in the greatest need, of which the renewal of Blackpool is a key priority.”*

2.78 By concentrating focus on Lancashire's competitive strengths and capabilities, tackling major infrastructure constraints, boosting the business base, and refocusing the approach to skills, the LEP will have established new economic opportunities that can deliver 50,000 new jobs, 40,000 new houses and £3 billion additional economic activity, above the local trend rate.

2.79 Part 2 of this document, Lancashire's Growth Deal, set out the LEP's ambitious Growth Deal proposition which will create an economically confident Lancashire that is capable of playing a leading role, once again, in the economic life of the nation.

2.80 Lancashire's Growth Deal took the vision, objectives and priorities of the SEP and set out an integrated programme of interventions that the LEP believes are capable of generating the step change required to move the local economy forward.

2.81 The Growth Deal identified six key priorities, set out below:

1. *Sector Development & Growth* - Realise the full potential of Lancashire's competitive economic strengths and business base.
2. *Innovation Excellence* - Maximise the economic value of Lancashire's centres of research and innovation excellence and globally competitive business clusters.
3. *Skills for Growth* - Refocus Lancashire's approach to skills provision, ensuring it is responsive to business needs and demands.
4. *Business Growth and Enterprise* - Strengthen and refresh Boost, Lancashire's business growth hub, and improve our strategic marketing capacity to attract new investors and occupiers.

5. *Releasing Local Growth Potential* - Create the right conditions for business and investor growth and unlock new development and employment opportunities across Lancashire.
6. *The Renewal of Blackpool* - Focus on addressing Blackpool's unique characteristics which require a specific focus, to create economic opportunities for its local communities.

2.82 'Section 7: Growth Deal Proposals' discussed in great detail each of the above listed priorities and identified projects for each.

Lancashire Growth Plan 2013/14 – Lancashire LEP (2013)

2.83 The Lancashire Growth Plan set out how the LEP intends to achieve strong and sustainable economic growth. It focused on ten established and new policy priorities. Priorities which remain up to date are considered here as they relate to the Fylde Coast:

- *Lancashire Enterprise Zone* – Includes the Samlesbury and Warton BAE facilities, which form the core of Lancashire's aerospace production industry, an industry which employed over 20,000 in 2013. Enterprise Zone status was awarded to Lancashire almost 9 months after other Enterprise Zones nationally. Despite this, Lancashire had become one of the most advanced Zones in terms of commercial progress and was one of the first to have a Local Development Order (LDO) approved by the Secretary of State and in place by 1st April 2012. The Enterprise Zone was designed to exploit the critical mass and "halo effect" of industrial activity at Samlesbury and Warton. It is expected to create up to 6,000 jobs over its lifetime, with between 5,000-7,000 jobs generated in the wider supply chain. It will meet identified demand for some 85,000 sqm of aerospace and engineering floorspace. An updated position on the Lancashire Enterprise Zone is provided in Section 5.0.
- *Preston and Lancashire City Deal* – The 'Wave Two' City Deal will deliver critical infrastructure with the potential to create 23,000 new jobs, build 15,000 new homes and generate new economic activity valued at £1 billion, in terms of additional GVA
- *Superfast Lancashire* – Superfast Lancashire was led by the County Council and delivered by BT. This £62.5 million project was to deliver superfast fibre broadband to parts of the county not covered by commercial deployments and will see the total amount invested in this technology in Lancashire rise to approximately £130 million. Early priority locations to receive superfast fibre broadband include the LEP's EZ sites

and it is noted that superfast broadband now extends to the entrance of the Hillhouse EZ. Since 2013, 98 percent coverage of 24 mbps has been achieved across Lancashire.

- *Lancashire Business Growth Hub* – Now known as Boost, this programme has provided business support to 12,000 Lancashire businesses.
- *Sector Delivery Programme* – Sector delivery plans were proposed for the nuclear, low carbon, automotive and shale gas sectors. The LEP will also develop Sector Delivery Plans to support rural growth and the visitor economy.
- *Arc of Innovation* – The LEP will develop a Delivery Plan which will have an initial focus on maximising synergies between centres of excellence in Lancaster, Hillhouse, Warton, Preston, Samlesbury, Darwen, Burnley and Barnoldswick. The Arc of Innovation will specifically support the growth plans of Lancaster University, the University of Central Lancashire (UCLan) and Edge Hill University, especially their innovation-focused and industry spin-out/spin-in developments in Lancashire
- *Local Growth Accelerator Strategies* – Local level economic growth strategies were proposed in East Lancashire, with Blackpool/Fylde Coast and Lancaster to follow
- *Skills for Growth* – The LEP’s Skills Board will develop an agreed Skills Plan with clear priorities, which will align adult skills funding and national initiatives. The Plan will also look to improve and strengthen hub and spoke linkages between local centres of excellence to address current and emerging skill demands in Lancashire
- *Planning for Economic and Housing Growth* – The LEP will establish a set of guiding principles to underpin its views and responses to strategic planning matters. These guiding principles will recognise the role that positive planning can play in attracting growth and development and creating a business-friendly environment for investors in line with Government’s ambitions. The LEP will also look to use national planning policy frameworks and tools, specifically Local and Special Development Orders and other simplified planning approaches.
- *International Trade and Investment* – The LEP will focus on promoting its offer in the international market place, in conjunction with Marketing Lancashire and UKTI (now the Department of Business and Trade), as part of an agreed inward investor strategy for Lancashire. As well as attracting new investors and repatriating overseas activities to Lancashire, the LEP will help local SMEs strengthen trade links and realise export opportunities in new and emerging markets. Lancashire’s Chambers of Commerce will play a key role in driving forward SME international trade activities.

- *Strategic Communications and Case-making* – The LEP will represent Lancashire at national government and in ongoing strategic funding bids.

LOCAL POLICY

- 2.84 This sub-section reviews the relevant policy documents of the three local authorities. It is split between planning policy, the evidence base which informed planning policy and regeneration plans and programmes for each local authority.

Blackpool – Planning Policy

Blackpool Local Plan Part 1: Core Strategy (2012 – 2027) – Blackpool Council (Adopted Jan 2016)

- 2.85 The Core Strategy is Part 1 of the Blackpool Local Plan and is a key planning document which set out where new development such as housing, employment, retail and leisure should be located to meet Blackpool’s future needs to 2027. Its vision is underpinned by four goals:

- *“GOAL 1: Sustainable regeneration, diversification and growth*
- *GOAL 2: Strengthen community wellbeing to create sustainable communities and reduce inequalities in Blackpool’s most deprived areas*
- *GOAL 3: Regeneration of the town centre, resort core and inner areas to address economic, social and physical decline*
- *GOAL 4: Supporting growth and enhancement in South Blackpool to meet future housing and employment needs for Blackpool and the Fylde Coast.”*

- 2.86 The Core Strategy objectives, to achieve these Goals, relevant to employment matters are:

GOAL 1

“1. Ensure a balanced approach to regeneration and growth with sustainable development which meets the needs of Blackpool’s people now and into the future

3. Strengthen the local economy through sustainable investment in new enterprise, entrepreneurship and business start-ups, creating better paid jobs and a wider choice of employment

6. Address climate change issues by managing flood risk, protecting water quality, reducing energy use and encouraging renewable energy sources

7. Ensure there is sufficient and appropriate infrastructure to meet future needs.”

GOAL 3

“15. Secure investment in retail, leisure and other town centre uses in Blackpool Town Centre to strengthen the offer with high quality shopping, restaurants, leisure, entertainment and offices, making the town centre the first choice shopping destination for Fylde Coast residents and an attractive place to visit and do business.”

GOAL 4

“17. Support economic growth at the Blackpool Airport Corridor and on lands close to Junction 4 of the M55

20. Balance the requirement for new development in South Blackpool whilst recognising the distinctive character of remaining lands on Marton Moss

21. Secure the necessary infrastructure to enable new sustainable development which integrates with its surroundings, providing choice and convenient access to employment, services and community facilities.”

2.87 With regard to economic development and employment, the Local Plan recognises that the visitor economy will continue to underpin Blackpool’s economy and remains an important growth sector. However, supporting new business growth and securing sustainable investment that will provide new jobs in other employment sectors is needed to strengthen economic prosperity.

Policy CS1: Strategic Location of Development notes that Blackpool’s future growth, development and investment will be focused on inner area regeneration, comprising:

“a. Blackpool Town Centre, including the three strategic sites of Central Business District, Winter Gardens and Leisure Quarter

b. The Resort Core, containing the promenade and the majority of resort attractions and facilities, holiday accommodation and major points of arrival

c. Neighbourhoods within the inner areas, including mixed holiday and residential neighbourhoods adjacent to the seafront, and predominately residential neighbourhoods on the edge of the inner areas.”

- 2.88 *“Supporting growth in South Blackpool will be promoted to help meet wider housing and employment needs, whilst recognising the important character of remaining lands at Marton Moss, identified as a strategic site.”*
- 2.89 Policy CS3: Economic Development and Employment, states that sustainable economic development will be supported by safeguarding around 180 hectares of existing industrial/business land for employment uses, promoting office development, enterprise and business start-ups in Blackpool Town Centre and the Central Business District and again by promoting land in South Blackpool as a strategic priority to help strengthen the Fylde Coast economy and meet the future employment needs of Blackpool residents.
- 2.90 Part two of this policy also highlights that Blackpool residents should have the necessary skills to access newly generated employment opportunities. A more skilled resident population will also help to attract new and expanding businesses to the area as well as supporting inward investment particularly public sector and government department relocation opportunities.
- 2.91 It is also acknowledged that Blackpool is intensely developed and has a tightly constrained boundary, which means there is a demonstrable lack of future development land. It was therefore extremely difficult for the shortfall of employment land (13.7 ha) identified in previous Blackpool employment land research to be met in Blackpool. In discussions between Blackpool and Fylde Councils it was agreed that provision for this shortfall will be added to Fylde’s requirement over the Fylde Local Plan period to 2032. Meeting Blackpool’s longer term needs is therefore integrally linked with how it functions within the Fylde Coast and the joint consideration of future employment development for the sub-region.
- 2.92 Policy CS24: South Blackpool Employment Growth notes that, in South Blackpool, the following would be supported:
1. *Redevelopment of existing employment sites within South Blackpool to provide high quality modern business/industrial facilities (Class B uses)*
 2. *Proposals for major new business/industrial development (Class B uses) in principle at sustainable locations within wider lands at South Blackpool to support sub-regional*

economic growth, including: a. Blackpool Airport Corridor b. Lands close to Junction 4 of the M55.

- 2.93 Finally, the Local Plan outlines three opportunities for improving employment opportunities in Blackpool:
- Securing Inward Investment
 - Developing an effective skills agenda
 - Promoting Entrepreneurship.
- 2.94 Policy CS17: Blackpool Town Centre seeks *“To re-establish the town centre as the first choice shopping destination for Fylde Coast residents and to strengthen it as a cultural, leisure and business destination for residents and visitors, new development, investment and enhancement will be supported which helps to re-brand the town centre...”* Points to achieve this include *“Growing an office sector to create an attractive centre to do business”* (Point D).
- 2.95 Policy CS19: Central Business District (Talbot Gateway) promotes a mixed use development in the Talbot Gateway *“which will become an important anchor for the north of the town centre; providing a welcoming arrival experience, connecting with the wider town centre and complementing its retail offer.”* Uses to be supported here are:
- a. *“A public transport interchange around a re-modelled railway station and enhanced pedestrian environment*
 - b. *Retail development that supports the existing major foodstore, including cafes and restaurants*
 - c. *Offices*
 - d. *Police Headquarters*
 - e. *Law Courts*
 - f. *Improved public car park provision for the wider town centre*
 - g. *Hotels*
 - h. *Residential.”*
- 2.96 *“In addition to new development, proposals to improve the appearance of existing buildings will be supported.”*

The Local Plan Part 2: Site Allocations and Development Management Policies – Blackpool Council (Adopted Feb 2023)

2.97 In support of Policy CS3 of the Core Strategy (safeguarding 180 ha of existing business/industrial land for B2, B8 and E(g) employment use, see above), Policy DM7 provides detail on these safeguarded employment areas in Blackpool including the remaining available land and appropriate use classes for each area. 18.97 ha of development land across the ten identified employment areas was available, as of March 2021 (Table 2).

Table 2 – Blackpool Employment Areas and Available Employment Land

Employment Area	Available Land (Ha) (as at March 2021)	Appropriate Use Class
Blackpool Airport Enterprise Zone ⁵	14.15	B2, B8, E(g)
Vicarage Lane	0.02	B2, B8, E(g)
Clifton Road	2.50	B2, B8, E(g)
Preston New Road (NS&I)	-	E(g)
Chiswick Grove	-	B2, B8, E(g)
Mowbray Drive	0.3	B2, B8, E(g)
Devonshire Road / Mansfield Road	0	B2, E(g)
Moor Park	-	B2, B8, E(g)
North Blackpool Technology Park	2.00	B2, B8, E(g)
Warbreck Hill	-	E(g)(i)
Total	18.97	

Source: Blackpool Council, 2023

⁵ Incorporates Blackpool Business Park, Squires Gate Industrial Estate and Sycamore Estate

- 2.98 The available land identified above will be used to meet the requirement for 31.5 ha of new employment land to 2027, identified in the Core Strategy, along with 13.7 ha of employment land in Fylde provided through the Duty to Co-operate and acknowledged in the adopted Fylde Local Plan (discussed below).
- 2.99 It is recognised in the Employment Land Update 2021 and Blackpool Airport Enterprise Zone Topic Paper (Feb 2022, discussed below) that some of the safeguarded employment land, 3.6 ha, has been developed for other purposes. Reflecting this and to boost land take-up, around 9 ha of additional employment land was identified at the Blackpool Airport Enterprise Zone, taking the total available land in this area to 14.15 ha, as noted in Table 2 above.
- 2.100 Policy DM8: Blackpool Airport Enterprise Zone noted that *“The Council supports the sustainable development of the EZ to create more businesses and jobs and attract international investment with positive benefits for the sub-regional economy and increasing the contribution to national growth. In supporting development at the EZ, the viable long term operation of Blackpool Airport must be maintained.”*
- 2.101 The policy identified that the target sectors for the EZ will be the energy industry, advanced manufacturing and engineering, aviation and aerospace, food and drink manufacture and the digital and creative sector. *“Other B2, B8 and E(g) uses will be considered where this promotes job creation and industry diversification provided it does not compromise the development of the target sectors.”* Supporting retail and childcare facilities are allowed for in the south east quadrant.
- 2.102 Policy DM8 allowed for the release of around 10.3 ha of land from Green Belt to support development at the EZ by 2027, including serviced employment plots, enabling housing development, a new link road and associated infrastructure works.

Blackpool – Planning Policy Evidence Base

The Local Plan Part 2: Employment Land Update 2021 and Blackpool Airport Enterprise Zone Topic Paper – Blackpool Council (2022)

- 2.103 This Employment Land Update reviewed employment land take-up since the start of the current plan period and informed the policies and allocations within the Local Plan Part 2: Site Allocations and Development Management Policies.

- 2.104 Over 2012-2021, the average take-up was 0.62 ha/year. This was nearly half the expected average take up of 1.2 ha/year. Reflecting this, the future take-up needed to meet the Borough's employment land requirement, as set out in the Core Strategy, is 12.18 ha over 2021-2027. This equates to an annual required take up rate of 2.03 ha/year. In addition, during this period there was a loss of 3.6 ha of designated employment land to other uses.
- 2.105 As of 2021, the amount of designated employment land stood at 172.5 ha, below the 180 ha target in the Core Strategy.
- 2.106 Given the loss of employment land to other uses and the slow rate of take up of allocated employment land, this paper proposed the provision of a further 9.4 ha of land at the Blackpool Airport Enterprise Zone, which was included in the Local Plan Part 2: Site Allocations and Development Management Policies Document, as noted above. The additional 9.4 ha would also bring the total designated employment land to 181.9 ha, in line with Policy CS3 of the Core Strategy.
- 2.107 The Blackpool Airport Enterprise Zone Topic Paper provided the exceptional circumstances justification for the release of the Green Belt land at the EZ, as allocated in Policy DM8 of the Local Plan Part 2: Site Allocations and Development Management Policies Document, in order to support the economic delivery of the Enterprise Zone.
- 2.108 The economic justification establishing exceptional circumstances was to enable the 'pump-priming' of new development integral to the fiscal approach adopted and approved by the Accountable Body, the Lancashire LEP and endorsed by the then DCLG (now DLUHC).
- 2.109 The importance of a plan-led approach through the Local Plan Part 2 to amending the Green Belt is emphasised, as the alternative is the more demanding test of establishing 'very special circumstances' that any planning application would be subject to through the development management process. Using the latter approach would inevitably cause uncertainty and an element of delay to the delivery of EZ, causing fiscal strain and negatively impacting on overall EZ viability.

2.110 Considerations of alternative sites to the Green Belt land, to meet the identified, development needs, has also been undertaken. No non-Green Belt development options exist outside of the EZ. Within the EZ boundary no alternative land opportunities that would deliver the required land receipts and fund the prudential borrowing needed to deliver the EZ, exist.

Blackpool Employment Land Study 2013 – Blackpool Council (Published 2014)

2.111 This Study formed part of the evidence base for Blackpool's Local Plan and analysed employment land supply, need and demand over the plan period to 2027. Work included a review of the 13 safeguarded Employment Areas of Blackpool. Comprising 182.1 ha of land in E(g)/B-Class Use these locations were identified as making an important contribution to Blackpool's economy and should continue to be safeguarded as employment land.

2.112 At July 2012, Blackpool had a baseline supply of 21.6 ha of available employment land made up of 19 sites distributed across the Borough. 11 ha of this was high quality land. Most were subject to developer interest and identified as viable to develop, even if development was unlikely in the short term due to the then economic downturn. The study recommended the Council continue to protect this supply in the Local Plan.

2.113 Analysing long-term historical take-up rates per year since 1991 (1.6ha) and 2001 (1.9ha) and projecting them forward over the fifteen year plan period suggested a range between 24ha and 28.5ha. Using the midpoint of 26.25ha and providing a 20 percent buffer for flexibility and market choice suggested 31.5ha of employment land was required to 2027.

2.114 The two alternative methods, policy-off employment based and labour supply forecast methods, suggested that Blackpool needed significantly less employment land. However, whilst these alternative forecast methods provided helpful comparisons, their limitations mean they were discounted in favour of using long-term take-up rates to calculate future requirements.

2.115 Meeting the 31.5ha requirement will require taking advantage of regeneration opportunities in the 13 safeguarded Employment Areas, particularly in the under-occupied areas of South Blackpool. To facilitate regeneration, redevelopment opportunities which introduce a suitable mixed-use development, including housing, should be considered in

exceptional circumstances on a small minority of sites where this would secure the future business/industrial use of the site.

- 2.116 The 21.6 ha of available employment land should be protected, however, only 17.8ha of this land was judged likely to come forward for employment development, giving a further need of 14ha to 2027. To address this Fylde Borough Council agreed, through the Duty to Co-operate, to allocate 14 ha of employment land (in addition to their own requirement for 46.6 ha) to help meet Blackpool's requirement.
- 2.117 The study recommended the Council should continue to promote Blackpool Town Centre and particularly the Central Business District for office uses to boost the presently modest local offer. It should also support the wider Fylde Coast strategic employment sites which play a vital role in supporting the Fylde Coast economy.

Employment Land Technical Paper – Blackpool Council, 2012

- 2.118 This technical paper provided further justification and explanation of the approach taken by the Council to meeting future employment land requirements over the plan period to 2027, which informed the above Local Plan Documents.
- 2.119 A review of employment land take-up in Blackpool between 1991 and 2010 showed a total take-up of 30.9 ha, or 1.6 ha/year. However, the average take-up from the period of 2001-2010, where there was availability of new, modern employment land to allow a level of growth which matched demand, was deemed to be the most appropriate/realistic period from which to project future need. This period had an average take-up of 2.2 ha/year.
- 2.120 Projecting this higher figure forward over the fifteen-year plan period to 2027 and providing for a 20 percent flexibility factor would suggest a future requirement of 35-40 ha of additional employment land to meet Blackpool's needs in addition to existing developed business space. The 13 safeguarded Employment Areas of Blackpool contained 185 ha of employment land in total, of which 23.5 ha was undeveloped as of 2012. This implied that there was a shortfall of available, safeguarded development land.

2.121 To meet the further employment land need over the plan period two strategies were identified:

- Capitalise more on existing employment within Blackpool
- Co-operate on sub-regional employment development.

2.122 With regards to the first approach, it was noted that whilst the 13 main industrial/business locations safeguarded for employment use provided 23.5 ha of developable land, just 9 ha of this comprised genuinely attractive sites, suitable and available for development. Therefore, making more undeveloped sites attractive to the market, and improving occupancy of existing sites, was an important element of meeting future needs.

2.123 It was also recognised that Blackpool's circumstances are such that meeting its future long term needs are integrally linked with the wider Fylde Coast employment market area. Given the shortage of good quality business / industrial land within the Borough, it was proposed that the Council cooperate with neighbouring authorities to promote the economic development of sites across the Fylde Coast Sub-Region and support sub-regional growth.

2.124 It was also considered that continued co-operation with the neighbouring authorities of Fylde and Wyre for sub-regional growth would not undermine Blackpool's local economy and would deliver the strongest economic, social and environmental benefits.

Blackpool – Regeneration Plans and Policies

2.125 Blackpool is subject to a diverse range of regeneration programmes and projects, with a particular focus on the central areas of the town as well as the Airport EZ. These are considered here, firstly looking at the key masterplan and action plan documents/funding bid details produced which set out programmes/projects, followed by a review of the progress on project/programme delivery, to date, as noted in the available documentation. Please note discussion on the most up to date position on relevant commercial projects, as at summer 2023, has been completed with local and sub-regional stakeholders and is summarised in Section 5.0.

Masterplan Documents

2.126 Regeneration masterplans produced to guide project and programme development in Blackpool over the last 20 years.

Blackpool Regeneration Masterplan Strategy – Blackpool Council, 2003

2.127 Now some 20 years old, many of the detailed programmes set out here have been superseded or implemented. However, some projects set out here have been expanded upon and brought forward through subsequent masterplanning work. The main growth areas identified within it were:

- *Town Centre Zone* – Included the North Station development to provide new retail, commercial, community, residential and civic uses (including the new magistrates court) around a new public square. An extension of the existing tram lines along Talbot Road to create a new public transport interchange. Further investment in public realm and new hotel facilities, plus a new Conference Centre
- *Village Zone* (south of Town Centre) – Proposals linked to a major casino development which was not ultimately realised. Other proposals for housing and public realm investment
- *Central Beach Zone* (between football stadium and South Pier) – Proposals for new build entertainment and residential facilities, plus improvements to existing facilities
- *Pleasure Beach Zone* – Proposals included a new casino and hotel facilities. On the site of the existing Sandcastle a new Aquarium and waterfront hotel were proposed, connected to a newly designed Promenade. Also, a new water based theme park. Again, for the most part these projects, public realm investment apart, were not taken forward.

Investment Plan for Sustainable Resort Regeneration 2005/06 - 2008/09 – ReBlackpool, 2005

2.128 This historic regeneration plan was focused on a regional casino development which was not ultimately secured for Blackpool. Proposals for a major new water park close to the Pleasure Beach were also not realised. However, it also continued to propose a major commercial development around Talbot Road, including the relocation of the Law Courts, a project now being progressed as Blackpool Central (discussed below). Also considered a range of public realm investments on the Promenade which have since been delivered.

Blackpool Town Centre Strategy – Blackpool Council, 2013

2.129 The town centre strategy outlined a vision for Blackpool Town Centre over the next 15 years, supported by six key objectives and developed a five-year action plan with delivery mechanisms. It was updated by the 2022 Town Centre Strategy.

2.130 The vision for Blackpool was that: *“In 2027, Blackpool Town Centre is the thriving heart of Britain’s favourite resort, offering an all year-round high quality shopping, leisure, cultural and entertainment destination. Residents and visitors from all walks of life choose to spend time here throughout the day and into the evening. The revitalised Tower and Winter Gardens are major attractions along with an exciting programme of events and festivals. Blackpool hosts a vibrant outdoor café culture, with attractive streets and spaces providing high quality public realm and strong links between the town centre and the beach. A high quality integrated transport system allows easy access to the town centre and provides a positive arrival experience.”*

2.131 This vision was supported by outlining six key objectives for the town centre:

1. *“Re-establish the town centre as the first choice shopping destination for Fylde Coast residents.*
2. *Strengthen the town centre as a vibrant leisure, entertainment, cultural and business tourism destination for residents and visitors.*
3. *Grow the town centre as a place to do business by creating a Central Business District and creative industries hub.*
4. *Create a choice of high quality homes within and around the town centre.*
5. *Improve the quality of buildings, streets and spaces and their maintenance and management.*
6. *Provide convenient access to the town centre by all modes of travel and enable easier pedestrian movement.”*

2.132 Part 2 of the strategy identifies strengths, weaknesses, opportunities and threats facing Blackpool in 2013 in relation to ‘Leisure, Entertainment, Culture and Business Tourism’, ‘Catchment, Visitor Profile and Performance’, ‘Retail and Service Provision’, ‘Office Space’, ‘Housing’, ‘Quality of the Environment’ and ‘Access and Movement’.

2.133 Of particular relevance to this employment land needs assessment were the comments about office space. One issue identified was that the town centre is not an established office location, with the market heavily focused outside of the centre. It was also recognised that the majority of office employment was government and public sector based (over 75 percent). However, the relocation of Council satellite offices into the Central Business District will bring over 900 workers into the town centre. Together with further office space planned for future phases, this development could provide the

foundation to attract new offices into the town centre.

2.134 To combat the issues raised in Part 2 priorities for intervention were raised under six themes. The themes are as follows:

- *“Re-establish the town centre as the first-choice shopping destination for Fylde Coast residents.*
- *A vibrant leisure, entertainment, cultural and business tourism destination for residents and visitors*
- *Grow the town centre as a place to do business by creating a central business district and creative industries hub.*
- *A choice of quality homes within and around the town centre.*
- *Improve the quality of buildings, streets and spaces and their maintenance and management.*
- *Provide convenient access to the town centre by all modes of travel and enable easier pedestrian movement.”*

2.135 To deliver on the priorities identified under the above themes, a five year action plan was outlined. Relevant actions included a focus on physical improvement and investment in core locations including Church Street, Victoria Street and Bank Hey Street, Houndshell Shopping Centre, the Winter Gardens, Blackpool Tower, the Grand Theatre and the evening/leisure economy more generally. FY Creatives and Eighty -One Central (former Ponden Mill building, Church Street) was particularly identified as a location for the development and expansion of start-up and grow on office space. The key development sites included:

- Central Business District – This project has since progressed and is considered in subsequent studies, noted below. Proposals in this Study included new office accommodation for Blackpool Council and others, a Sainsbury’s food store, refurbished and improved car parking, complimentary retail/leisure/hotel uses, improvements to the rail station
- Former Central Station site – Again a project which has since progressed. A major leisure development, with proposals including the relocation of the Police and Law Courts.

Blackpool Airport Enterprise Zone Business Case and Blackpool Airport Enterprise Zone Masterplan – Blackpool Council; Fylde Borough Council; Blackpool, Fylde and Wyre Economic Development Company; Blackpool Airport Enterprise Zone Lancashire Enterprise Partnership, 2015 and 2018

- 2.136 The Blackpool Airport Enterprise Zone comprises 144 ha of land incorporating the existing Squires Gate and Blackpool Business Park Employment Areas along with most of Blackpool Airport, apart from the runway. 45 percent of the site falls within Blackpool Borough, 55 percent with Fylde. Blackpool Airport became an EZ in 2016 and the status remains active until 2041. Financial incentives offered by the EZ included Business Rates Relief, which ended in March 2022, and Enhanced Capital Allowances (available until November 2023).
- 2.137 Objectives for the EZ included to increase the number of jobs on the site by 3,400 over 25 years, from 1,600 in 2016. Also, to provide 260,000 sqm of floorspace development, conversion or repurposing. The targeted sectors for jobs growth were in Energy, Aviation, Advanced Manufacturing, Food and Drink Manufacturing and Digital and Creative sectors and back office administration.
- 2.138 The Vision for the 2018 Masterplan was: *“To make Blackpool Airport Enterprise Zone a premier business location in the North West, where high quality businesses facilitate economic growth and employment, and further develop the strong skills and knowledge base of the Fylde Coast.”* The objectives to deliver the vision are:
- *“To meet the demand of modern businesses from a diverse range of sectors by continually adapting the Masterplan through the promotion of key character areas*
 - *To provide a fully connected, modern business park with enhanced infrastructure with an emphasis on sustainable transport, increased accessibility and navigation both in and around the Enterprise Zone*
 - *To ensure that utilities and other business critical infrastructure is competitive with other national and international locations and seek out low carbon and green alternatives where feasible*
 - *To main high levels of awareness and encouraging new investment through strong branding and marketing, promoting the Enterprise Zone as a leading location for inward investment*
 - *To provide support for new and existing companies to improve their competitiveness*

and create an environment where the exchange of ideas, innovation and knowledge is harnessed and shared for sustainable future growth

- *To deliver a high quality and sustainable urban environment where cutting-edge architecture is complemented with healthy, safe and connected spaces to create an interesting, active and engaged place to work and do business*
- *To protect the airport's future by supporting the ongoing operations and expansion of the airport.”*

2.139 Market demand in the EZ, as set out in documentation can be defined as:

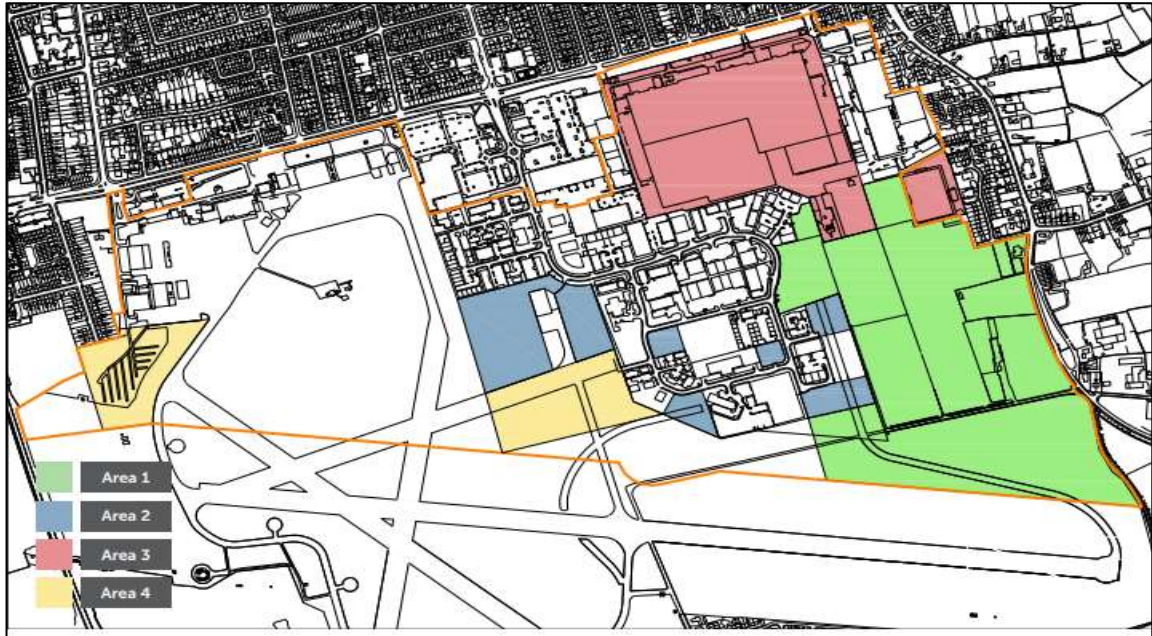
- *Industrial* – There was a need for a range of unit sizes suitable for B2 manufacturing. Most requirements will be sub-1,000 sqm in size but there was demand for larger units, spurred by the Enterprise Zone designation. There was a need to provide land plots that would be suitable for a range of manufacturing unit sizes up to 25,000 sqm. There was an immediate need for serviced development site for marketing
- *Offices* – Demand was for smaller units and plots were provided for to develop multi-let office buildings. Larger office properties may be deliverable once momentum has built up in the EZ
- *Services* – There was a need for complementary services to make the EZ more attractive to potential core occupiers and investors.

2.140 Planning and masterplanning split the EZ into multiple development areas as set out in Figure 2. To 2018, those Areas have seen the following progress:

- *Area 1 (Green) – “Relocation of Common Edge sports facilities. Provision of 2 x third generation floodlit pitches. Potential additional sports and leisure facilities. Open up greenbelt land for development of larger footplate manufacturing and distribution (B2/B8). New eastern access route from Common Edge/Queensway. Associated drainage and utilities which will serve subsequent phases. Extension of new access route, contingency and EIA archaeology. Other acquisitions and some private sector investment.”*
- *Area 2 (Blue) – “Commercial development/redevelopment of sites by private sector and/or public sector through JV and developer partnerships.”*
- *Area 3 (Red) – “Potential demolition and phased re-development of existing factory buildings and other structures.”*
- *Area 4 (Yellow) – “Acquisition and relocation of outdated operational aviation*

infrastructure at Blackpool Airport including control tower, hangars, fuel farm, aircraft parking aprons, other operational buildings particularly helicopter based operations.”

Figure 2 - Blackpool Airport Enterprise Zone Development Update



Source: Lancashire LEP, Blackpool Airport Enterprise Zone, 2018

2.141 Future development in the EZ can be linked to six masterplan character zones (see Figure 3):

- *“Knowledge Quarter – the home of business, research, development and education*
- *Airport Zone – focused on viable and high quality airport operations*
- *Business Hub – key development sites identified along the existing Amy Johnson Way*
- *Innovation Gateway – A new gateway and landmark building will create a new active business hub*
- *Industrial Heart - state of the art industry at its heart provides a mix of advanced manufacturing, light industrial and logistics to serve the industrial needs of the region*
- *Third Space /Sports Village – key eastern access gateway site providing space for activity, engagement and networking alongside local communities.”*

Figure 3 - Blackpool Airport Enterprise Zone Character Zones



Source: Lancashire LEP, Blackpool Airport Enterprise Zone, 2018

Climate Emergency and Blackpool’s Climate Emergency Action Plan – Blackpool Council, 2019 and 2021

2.142 It is first noted that on 26th June 2019 Blackpool Council declared a Climate Emergency. This included a commitment to cut the Council’s own emissions to zero by 2030. Of relevance to this study, it is noted that Blackpool has been awarded £5.1 million in Shared Prosperity Fund bid for business support, eco-coaching, flood protection, intensive employment support and community cultural art projects. An eco-hub will be established in the town which houses eco-coaches, to provide residents with energy efficiency advice and support.

2.143 Subsequently a Climate Emergency Action Plan was produced with the goal to make Blackpool Council net zero by 2030, and to work towards achieving the same across the local authority area. Actions to achieve such net zero goals are grouped into ten key themes:

- Housing
- Buildings and the Built Environment

- Transport, Getting Around and Digital
- Power and Heat
- Cleansing, Food, Water and Waste
- Community Leadership, Communication and Involvement
- Working With Others
- Business
- Natural Environment
- Building Knowledge, Capacity and Financial Resource.

2.144 Key actions under the Business theme are for the Council to:

- *“Work with businesses to promote the environmental and financial benefits of the circular economy*
- *Promote and support take up of a sustainable tourism accreditation programme*
- *Work with the borough’s largest employers to set targets for energy and emissions reduction*
- *Promote resource efficiency to Small and Medium Enterprises.”*

2.145 More generally, the change to a low carbon economy will require new skills and jobs. The Council *“will develop a low carbon skills transition plan, which will include looking at opportunities for business and service industry growth. This will require significant financial investment from the UK government and the participation of other organisations involved in education and skills.”*

Blackpool Town Centre Strategy and Action Plan – Blackpool Council, 2022

2.146 The town centre strategy outlined a vision for Blackpool Town Centre over the next 20 years, supported by six key objectives and developed a five-year action plan with delivery mechanisms. It updates the 2013 Town Centre Strategy.

2.147 The vision for Blackpool was that: *“By 2040, Blackpool Town Centre is an attractive and vibrant place within Britain’s favourite resort. Offering a year-round high-quality experience for residents, visitors and workers from all walks of life. Blackpool Town Centre embraces and builds upon its culture and heritage, is forward looking and joyful with a healthy mix of credibility, nostalgia and fun which is unique to Blackpool.*

2.148 This vision was supported by outlining six key objectives for the town centre, updated from the 2013 Study:

1. *“RETAIL: The town centre is home to big brands and independents, serving residents, visitors and workers alike*
2. *EXPERIENCE: The town centre has a strong and vibrant entertainment and leisure offering, all with a sense of fun*
3. *WORK AND LEARN: The town centre fosters learning and provides opportunities for work for small units and big businesses*
4. *LIVING: The town centre provides high quality, affordable housing within and around the town centre*
5. *CULTURE: The town centre is built on iconic heritage with a healthy offer of arts and culture*
6. *CONNECTED: The town centre is well connected (physical and digital) and provides for its community, taking care of their safety, security and wellbeing.*

2.149 Projects within the Strategy focus on themes of public realm, zoning and access, community, events, culture and entertainment, and heritage.

Funding Bid Details/Related Requests to Government

2.150 To support the regeneration programmes and projects put forward, a range of funding bids have been submitted under programmes including the Town Deal and Levelling Up.

Blackpool Town Investment Plan – Blackpool Town Deal Board, 2020

2.151 The Town Investment Plan described the interventions (both underway and planned), the resources (both public and private) and the potential policy, infrastructure and financial changes or ‘Asks’ that were needed to realise the economic potential of the Town. Nine interventions were prioritised for Town Deal Funding

- *Blackpool Central - Relocation of Blackpool magistrates court to unlock the site for a £300 million private sector development*
- *Multiversity – Feasibility work and acquisition of land to create a new university experience that facilitates higher level upskilling, reskilling and lifelong learning within the Town Centre and free up an existing College site for residential development*
- *Blackpool Airport Enterprise Zone – delivery of new road access improvements to open up the site, reduce congestion on surrounding access roads and investment to*

realise the potential of the Aquacomms new trans-Atlantic fibre optic cable

- *Innovation Partnership – digital technology programme targeted at all sectors but in particular for retail, leisure, and public transport services*
- *Southern Quarter/Revoe Community Sports Village – Establishment of a sports village with leisure, education and residential uses including property acquisition/demolition to support private sector development*
- *The Edge – Incubation Office Space in Stanley Buildings – provision of high quality, high tech managed workspace for start-ups and small businesses within the Town Centre*
- *Blackpool Illuminations – Modernisation and innovation of one of Blackpool’s key assets to drive visitor numbers*
- *Grundy Art Gallery – Feasibility work to scope the capital investment required to transform the cultural venue into a 21st century, sustainable gallery*
- *Youth Hub – Repurposing a town centre community hub to provide a focus for skills training and employ ability support for young people and vulnerable groups outside the labour market.”*

2.152 Overall, a total Towns fund submission of £50 million was made, towards a total Towns Fund of £500 million. Full sign off, of the seven key capital schemes was provided by DLUHC in March 2022. Blackpool Council will have until the end of the 2025/26 financial year to spend the money.

Levelling Up Funding

2.153 Commercial projects which successfully secured Levelling Up Funding (LUF), at the time of writing, alongside investment in housing, include:

- *Multiversity – (£65 million scheme with £40 million LUF Funding – joint supported bid with Wyre Council and £9 million from Town Deal for site acquisition). Proposals for £65 million world-class university experience*
- *Blackpool Central – (£40 million in LUF Funding) Funding to facilitate the relocation of the Magistrates and County Courts to allow the £300 million regeneration scheme, creating an estimated 1,000 jobs.*
- *Abingdon Street – (£8 million in LUF Funding) Supporting a £26 million scheme to convert a Grade II-listed former post office into a 144 room hotel.*

UK Community Renewal Fund

2.154 Following on from Blackpool Council's invitation in April 2021 for organisations to submit project proposals to be included within a combined Community Renewal Fund bid, the following programmes were identified as successful, attracting £763,370 in funds for investment skills, employment, local businesses, community and place:

- *Ready for work (Inspira Cumbria Limited)* – Supporting young people moving into work, education or training.
- *Blackpool youth hub (Blackpool Council)* – Supporting young people moving into work, education or training.
- *Piloting place-based innovation catalysts: supporting innovation leadership, clean growth and secure digitisation (Lancaster University)* – Supporting the creation and development of Innovation Driven Enterprises in Blackpool through innovation, talent and skills initiatives, fostering knowledge transfer and developing innovation plans.
- *The role of digital museums and archives in culture-led regeneration: A feasibility study (University of Central Lancashire).*

Blackpool Town Prospectus 2030 Agenda for Action – Blackpool Council, Blackpool Pride of Place, 2022

2.155 The Prospectus set out the Council and partners ambitions for change in Blackpool, and associated support requests from local government, aligned to the overall vision for the town's future. It had the headline outcomes that by 2030, partners can:

- *“Establish the national perception of Blackpool as a 'can do' place with a buzz, attracting graduates, families, businesses and visitors to a credible business investment location, brimming with local pride*
- *Create and safeguard at least 10,000 jobs and grow the economy by £1bn through turbocharging tourism, building on existing and emerging economic strengths and innovative opportunities*
- *Tackle the concentration of deprivation in the inner areas (the worst in England) raising it out of the bottom decile and creating 3,000 new quality homes*
- *Achieve top quartile employment rates for 16-24-year-olds compared to other Lancashire Local Authorities through a particular focus on health, well-being, resilience and preparedness for work through upskilling and reskilling.”*

2.156 The primary ask of national government was that, building on the allocation of Civil Servants to support individual programmes, it appoints “a single senior civil servant to push the boundaries of place-based working and help us develop innovative cross-cutting solutions, with a mandate from Ministers to work across all Government departments to make them happen. This new way of integrating central Government into place-based transformation could be piloted for a limited time and be assessed as part of Lancaster University’s current work providing rigorous evaluation of our approach to date. We believe this approach could be the key to unlocking some of the biggest challenges for the levelling up agenda in Blackpool and beyond.”

2.157 In the area of economic growth and regeneration, including infrastructure and tourism, the following initiatives are planned:

- Blackpool Central, a £300million private sector development which will bring 1,000 new jobs and £75 million/year visitor spend. A £7 million investment of Towns Fund will assist with the relocation of the Courts’ service and the demolition of the building to enable the later phases of the development to proceed,
- Other planned Town Deal investments include a Youth Hub (£500,000), the Multiversity (£9 million), the Revoe Community Sports Village (£5.5 million), The Edge business incubation centre (£4.5 million), Blackpool Airport Enterprise Zone infrastructure (£7.5 million) and the Illuminations revitalisation (£4.5 million)
- Development of Blackpool as a centre for social enterprise activity, brought about by cross sector working and by a bid for Social Enterprise Place status
- An innovation zone with Lancaster University, supporting 'clean growth' as part of the North West’s energy coast
 - Implementation of a town-wide social value strategy coordinating training, apprenticeships, work experience, mentoring and other support.

2.158 To support this, the ‘asks’ from government were:

- *“DLUHC to support Blackpool’s Round two Levelling Up Fund submission to address the major regeneration challenges it faces.*
- *Recognition and support for the carbon neutral 2030 programme recently launched by the Council.*
- *DLUHC to support Blackpool’s bids to the forthcoming Shared Prosperity Fund to ensure these challenges are addressed with both capital and revenue funding.*

- *Cabinet Office to consider further relocations to the Civil Service Hub as part of the Government’s Places for Growth Programme.*
- *DLUHC to work with Blackpool to establish a national exemplar and sustained approach to Levelling Up through the forthcoming Shared Prosperity Fund and other measures.*
- *DfT to invest in the reopening the 5-mile Poulton to Fleetwood line as part of the ‘Restoring your Railway’ programme.*
- *DfT to invest in a passing loop on the South Fylde line to double rail frequency for commuters and students.*
- *Treasury support for Courts’ Relocation business case to facilitate Blackpool Central.*
- *DCMS and ACE funding to be managed by the newly formed Tourism Business Improvement District, to support a Resort wide, year-round events calendar and marketing campaign to drive new, higher spending, visitors to the resort.*
- *Enterprise Zone - extension of Business Rate Relief and Enhanced Capital Allowances until 2025, to ensure that the momentum is established and maximised.”*

Project/Programme Progress Information

2019-2024 Blackpool Council Plan – Blackpool Council, 2022 Update

- 2.159 The Council’s vision for Blackpool continues to be that it becomes *“The UK’s number one family resort with a thriving economy that supports a happy and healthy community who are proud of this unique town.”*
- 2.160 To achieve this, the Council will drive forward a modern vision of Blackpool, its economy and its position as the premier seaside resort in the UK, while also providing the help, support and opportunities for local people to make the most of their lives. The two main policy priorities for this are:
- Priority 1: Communities
 - Priority 2: The Economy
- 2.161 Table 3 sets out the key project and programme activities under the Economy Theme, and their progress as of 2022.

Table 3 – Blackpool Council Plan, Economic Projects and Programmes, Position as of 2022

Economic Theme	Project/Programme Goal to 2024	Progress as of 2022
Visitor Experience – Tourism and culture	Complete development of a new conference offer at the Winter Gardens, and increase numbers of new conferences	The £28 million, conference centre opened in early 2022
	Finalise design and funding, then deliver the Blackpool Museum project	Showtown will be Blackpool’s new museum. This c.£14 million project was under construction as of this study and is now open
	Implement a new model of funding and delivery to sustain the Illuminations, events programme and cultural services	£4.5 million secured from the Town Deal for infrastructure development, new technologies and commissioning national and international artists to contribute to the evolution of the illuminations offer. A new Tourism Business Improvement District has been formed designed to provide more co-ordination in promoting the cultural and events offer. Merlin are bringing new leisure developments to the town.
	Deliver the first phase of a £300m investment into Blackpool Central, to include world class visitor attractions, including the UK’s first flying theatre	The planning application for the initial phases of the project has been approved, including a new 1,306 multi storey car park and creation of the Heritage Quarter. Outline plans have also been approved for the rest of the site, including a major public events square, three indoor entertainment centres, a hotel, restaurants and other new hospitality and leisure spaces.
The Economy: Infrastructure and Regeneration	Complete the tram extension, transport interchange and new 4* hotel at Blackpool North Station	Talbot Gateway Phase 2 completed in 2022 including a new tram extension to Blackpool North Rail Station. Holiday Inn under construction at the Tram Interchange.
	Implement the Blackpool Enterprise Zone Delivery Plan, facilitating the growth of energy, aviation and food sectors	The Enterprise Zone attracted over 1,600 jobs to date. Nine developments had been completed as of this Strategy. Future schemes include a substantial remodelling of the airport to give it a sustainable future, and a solar farm development that could contribute up to half of the Council’s energy needs.
	Deliver extensions to the Central Business District at Talbot Gateway.	The Department of Work and Pensions (DWP) agreed a 25 year lease with Blackpool Council and partner Muse Developments to develop a new regional hub at Talbot Gateway. Work on the site commenced in 2022, and over 3,000 DWP staff will move into the Blackpool Hub and Centre for Health and Disability Centre (CHDA) in autumn 2024 in a new £100 million office development in Blackpool town centre.
	Further invest in highways, including completing the Quality Corridor programme, Yeadon Way upgrade and bridge renewal programme.	In addition to highways programmes, The Council purchased Houndshill Shopping Centre and Abingdon Street Market to bring forward major extension and regeneration schemes. Plans include an IMAX cinema and two new restaurants under construction at the time of this Strategy.

The Economy: Enterprise, Skills and Economic Inclusion	Get hundreds of people back into work via job schemes for the most vulnerable and disadvantaged, including HealthWorks and More Positive Together	Since 2018 nearly 600 people have been supported into work. More Positive Together helped secure jobs for 250 people in 2022, while also helping a further 200 people into education and training.
	Work with partners to deliver the Opportunity Area programme, raising attainment and aspirations of our young people	Support workers in schools have worked with over 300 young people since 2019, supporting improved attendance and behaviour.
	Support local businesses to grow and expand by maximising take-up of the Business Loans Fund.	In early 2019, the Council extended the Business Loans Fund scheme by a further £100million, bringing the total fund to £200million. By the end of September 2021, the fund had committed £134m, created 650 jobs and safeguarded further 1,100 jobs. It has supported investments in hotels, the hospitality business, leisure, manufacturing and marketing amongst other sectors.

Source: Blackpool Council, 2022

Fylde – Planning Policy

Fylde Local Plan to 2032 (Incorporating Partial Review) – Fylde Council (Adopted December 2021)

- 2.162 The Fylde Local Plan to 2032 (incorporating Partial Review) includes Strategic and Non-Strategic Allocations for new homes and employment land and other land uses. The Fylde Local Plan to 2032 superseded the saved policies of the Fylde Borough Local Plan (As Altered: October 2005). In turn, this Partial Review superseded nine policies of the Fylde Local Plan to 2032.
- 2.163 Based on the Fylde Employment Land and Premises Study (2012), completed by BE Group (discussed below), Fylde Council used the forward projection of employment land take up to forecast its needs. Updating from the Fylde Employment Land and Premises Study an average take-up rate of 2.22 ha/year is identified, giving a need of 46.6 ha for the plan period.
- 2.164 It is also agreed that 14 ha of Blackpool’s needs to 2027 would be met within the Fylde Local Authority Area. This was combined with Fylde’s local requirement of 46.6 ha, and an allowance for gains and losses over 2011-2015, to give a final need, to 2032, of 62.0 ha.

2.165 ‘Strategic Policy EC1: Overall Provision of Employment Land and Existing Employment Sites’ of the Local Plan provided for 62 ha of new employment land across eleven sites to be delivered during the plan period (see Table 4).

Table 4 – Fylde Allocated Employment Sites, Strategic Policy EC1

Site	Area (Ha)	Appropriate Use Classes
ES1 Queensway Industrial Estate, Snowden Road, St Annes	3.8	E(g), B2, B8
ES2 Dock Road, Lytham	0.9	E(g), B2, B8
ES3 Boundary Road, Lytham	0.7	E(g), B2, B8
MUS3 Mill Farm Sports Village, Fleetwood Road, Wesham (mixed use: employment and leisure)	1.1	E(g), B2, B8 and Leisure
ES4 Blackpool and Fylde Industrial Estate, Whitehills	2.4	E(g), B2, B8
ES5 Blackpool Airport Enterprise Zone, Squires Gate	14.5	E(g), B2, B8 (to be determined through a masterplan for the Enterprise Zone)
ES6 DWP, Brunel Way, Whitehills	4.9	E(g), B2, B8
ES7 Whitehills Business Park, Whitehills	5.6	E(g), B2, B8
MUS1 Cropper Road East, Whitehills (mixed use: housing and employment)	5.7	E(g), B2, B8
MUS2 Whyndyke Garden Village, Preston New Road, Whitehills (mixed use: housing and employment)	20.0	E(g), B2, B8
ES8 Naze Lane, Freckleton	2.4	E(g), B2
Total	62.0	

Source: Fylde BC, 2021

2.166 Strategic Policy EC1 identifies 30 existing business and industrial areas, and the mix of E(g), B2, B8 uses appropriate in each. In these locations, development proposals for alternative uses will be resisted, unless it is demonstrated to the satisfaction of the Council that there is no reasonable prospect of the site being used for the specified employment purposes. ‘Strategic Policy GD8: Demonstrating Viability’ sets out the tests which need to be satisfied to allow a change of use away from employment uses, on these Employment Areas. Specifically, one of the following tests needs to be met, that:

- “a) The continued use of the site / premises for its existing use is no longer viable in terms of the building age and format and that it is not commercially viable to redevelop

the land or refurbish the premises for its existing use. In these circumstances, and where appropriate, it will also need to be demonstrated that there is no realistic prospect of a mixed-use development for the existing use and a compatible use

- *b) The land / premises is / are no longer suitable for the existing use when taking into account access / highway issues (including public transport), site location, business practices, infrastructure, physical constraints, environmental considerations and amenity issues. The compatibility of the existing use with adjacent uses may also be a consideration; or*
- *c) Marketing of the land / property indicates that there is no demand for the land / property in its existing use.*

2.167 Strategic Policy GD8 also sets out the evidence which will need to be submitted where an application relies upon a marketing exercise to demonstrate that there is no demand for the land / premises in its current use.

2.168 'Policy EC2: Employment Opportunities' notes that the availability of land in the Borough for employment opportunities is limited. Therefore, the Council seeks to retain continued employment use of current employment sites. This can include any type of employment use, including agriculture, and may not be restricted to E(g), B2 and B8 land uses. Land and premises will be retained in employment uses unless it is demonstrated to the satisfaction of the Council that there is no reasonable prospect of the site being used for those purposes, having satisfied the tests of Policy GD8, as noted above.

2.169 The Council will take account of the following factors when assessing all development proposals for employment uses:

- *“a. The accommodation should be flexible and suitable to meet changing future employment needs, and in particular provide for the requirements of local businesses and small firms.*
- *b. The Council will seek to ensure that employment opportunities are provided and are easily accessible for local people and, where necessary, developers will be encouraged to implement relevant training programmes.”*

2.170 In *'Strategic Policy EC3: Lancashire Advanced Engineering and Manufacturing (AEM) Enterprise Zone at BAE Systems, Warton'* it is noted that the Council continues to support the specialised activity at BAE Systems, Warton, in line with the company's operations. The designation of the Lancashire Enterprise Zone at BAE Systems, Warton will help create more businesses, jobs and attract international investment, with positive benefits across the wider economic area. It will help improve the local economy and also increase the contribution to national growth. A Local Development Order and a Masterplan have been produced at this location.

2.171 *'Strategic Policy EC4: Blackpool Airport Enterprise Zone'* identifies the scale and nature of the Blackpool Airport Enterprise Zone. The designation of the EZ will help create more businesses, jobs and attract international investment, with positive benefits across the wider economic area. *"Fylde Council supports the sustainable development of Blackpool Airport, including working to explore the potential to develop commercial aeronautical activity and to relocate operational buildings and facilities closer to the main runway, in the areas outside the greenbelt, unless there are overriding operational requirements that constitute very special circumstances and which justify development in the Green Belt. The Enterprise Zone will help improve the local economy and also increase the contribution to national growth through targeting the energy industry, advanced manufacturing and engineering, food and drink manufacture and the digital and creative sector."* Alternative uses, such as retail and leisure, may be appropriate in the EZ where it can be demonstrated that they help deliver aviation uses on this site. Again, Local Development Orders and Masterplans will be produced.

2.172 *'Strategic Policy EC5: Vibrant Town, District and Local Centres'* notes the importance of retail as a part of the economy of the Fylde Coast sub-region. As town centres – including Blackpool, St Annes, Lytham, Kirkham, Cleveleys, Fleetwood and Poulton-le-Fylde – provide employment and a centre for leisure, cultural and social activities, the range and quality of the retail offer can contribute directly to the vibrancy of town centres and affect their vitality and viability.

2.173 District and local centres are vital to the sustainability of smaller communities. If this provision is lost people will have to travel further to meet their daily / weekly needs. These centres act as a focus for their communities and offer opportunities for social integration.

2.174 *'Strategic Policy EC6: Leisure, Culture and Tourism Development'* notes that tourism and leisure will be encouraged by promoting the Borough's tourist and heritage assets and supporting high quality regeneration and enhancement of those key assets.

Bryning with Warton Neighbourhood Plan, 2011 – 2032

2.175 The Bryning with Warton Neighbourhood Plan provides a vision for the future of the community and sets out clear planning policies to realise this vision. These policies have regard to national policies and advice and are in general conformity with the strategic policies of the Fylde Local Plan (2005) and the Fylde Local Plan to 2032 (Incorporating Partial Review).

2.176 Key issues with regards to employment are set out in Section 2 of the report and are as follows:

- *"There are concerns that future employment development within the parish should be of an appropriate scale.*
- *Workshops are required for small businesses within the village.*
- *A section of the Enterprise Zone should be allocated for new start-up businesses.*
- *Residents are concerned that all our Greenfields will be built on, then brownfield sites within BAE Systems/Enterprise Zone may be released in future years.*
- *No available employment land within the settlement."*

2.177 The stand-alone employment policy in the neighbourhood plan is 'Policy BWE1 – Protecting Existing Employment'. This policy states that *"The larger employment sites, including the existing employment area at BAE Systems, shown on Figure 3 will be protected for employment uses (Use Classes B1, B2 and B8) unless it can be demonstrated that the land is no longer viable for employment use and that there is no demand for such a use."*

2.178 The Parish Council is also committed to working with employment organisations, major employers and other local businesses to improve employment opportunities in Bryning with Warton. The development of individual business-related premises will be encouraged along with supporting existing brownfield sites into broader economic use.

St Annes on the Sea Neighbourhood Development Plan, 2016 - 2031 – St. Annes Town Council, 2016

- 2.179 This Plan is designed to guide and promote action over a number of years, to realise our vision of creating a unique ‘Garden Town by the Sea’, reflecting the distinct character of our town. The Plan is made by and for the residents of St. Annes.
- 2.180 The key issues which the Plan has sought to address are summarised in this document. Those that relate to the economy included:
- Ensuring the availability of employment land and adequate office accommodation
 - Protecting and improving the town centre.
- 2.181 Employment related objectives are identified with individual policies proposed for each. The first related to employment land uses is ‘SS1: Blackpool Airport Enterprise Zone’. The policy states that: *“The continued operation and viability of the airport is supported. The open lands of the airport identified on the Policies Map will be safeguarded from non airport related development. Further development required in relation to the operation of the airport, or development of ancillary commercial or leisure uses, will be located in the areas outside the Green Belt identified on the Policies Map, unless there are overriding operational requirements that constitute very special circumstances and which justify development in the Green Belt.*
- 2.182 *The delivery of the Blackpool Airport Corridor Enterprise Zone is supported. The delivery of the site will be supported by a Masterplan, which must have been prepared in consultation with relevant organisations, including with St. Anne’s Town Council. The land within the boundaries of the airport designated as Green Belt will be safeguarded, and this should be reflected in the agreed Masterplan.”*
- 2.183 Policy E4: Employment and enterprise provides support for *“proposals for small scale employment uses, (up to 1,000 sqm) social enterprises and other businesses, such as the creation of live work units”* subject to a set of criteria being met with regards to the environment, town character and vitality, residential development and more.
- 2.184 Office development is also encouraged within and on the edge of the town centre and on sites allocated for B1 development in policy ‘E5: Office Development’.

Fylde – Planning Policy Evidence Base

Fylde Employment Land and Premises Study – Fylde Borough Council, 2012

- 2.185 This report assessed the demand, supply and need for employment land and premises (Use Class B). It was carried out to underpin and inform the Council's Local Plan and analyse employment land demand, supply and need to 2030.
- 2.186 The Study identified that Fylde was an affluent area with little evidence of deprivation. Skill levels are above wider area averages, and a comparatively high proportion of people worked in professional occupations. The manufacturing sector employed the highest proportion of people in Fylde, with much of this accounted for by employment at BAE Systems, Warton, which included the 75 ha Enterprise Zone site, and Toshiba Westinghouse's nuclear fuel production facility at Salwick.
- 2.187 Stakeholders said that there was a lack of good quality industrial options in the Borough. Requirements were for smaller units of 500 sqm or less. Office demand was predominantly local and for small, good quality modern suites. Whitehills Park was the most popular business location although there may be demand for small offices in Kirkham and Lytham. The company survey identified modest demand from local businesses for industrial premises of 0-1000 sqm and offices of 0-500 sqm, primarily in Lytham and St Annes.
- 2.188 Existing land supply as of 31st March 2012 stood at 22.32 ha, across 24 sites, 15.23 ha in a worst case scenario. This supply was focused at Whitehills Park, close to the M55 motorway and Blackpool. Whilst this location might be attractive to new investors to the Borough, the relative distance and poor connectivity at present made it less enticing to Fylde's indigenous companies located in Lytham and St Annes. There was almost no supply in Kirkham while sites in St Annes and Lytham are either constrained or have owners seeking alternative uses.
- 2.189 The gross land requirement was calculated using a variety of scenarios, including historic take-up, employment-based forecasts and labour supply forecasts. The different scenarios provided a variety of estimates for Net Land Need in Fylde, ranging from -51.51 ha to +26.28 ha, given an existing land supply of 22.32 ha. All scenario results can be seen in Table 5 below.

Table 5 – Fylde Forecast Land Scenarios, 2012-2030

Scenario	Gross Land Need, ha	Existing Land Supply, ha	Net Land Need, ha
Long term Land Take-up	+48.60	22.32	+26.28
Employment Change (including sectoral reductions)	-15.42/ -23.88		-37.74/ -46.20
Labour Supply Change (100 percent work in Fylde)	+4.08/ +4.67		-18.24/ -17.65
Labour Supply Change (existing 66 percent ratio of those working in Fylde)	+2.69/ +3.08		-19.24/ -19.63
Policy On (linked to Enterprise Zone) Employment Change	-19.60/ -29.19		-41.92/ -51.51
Policy On (Linked to Enterprise Zone) Labour Supply Change	+5.64/ +6.42		-15.90/ -16.68
Policy On (Linked to Enterprise Zone) Labour Supply Change (existing 66 percent ratio of those working in Fylde)	+3.72/ +4.24		-18.08/ -18.60

Source: BE Group, 2023

2.190 As can be seen in Table 5, the largest estimate for net land need was based on long-term historic land take-up trends. In the Study, BE Group commented that *“in all instances where BE Group has been involved these (employment and labour supply) models have been discounted in favour of historic land take-up trends.”* This gave recommended further needs of 26.28 ha.

2.191 BE Group also identified potential additional sites for employment development, to meet the above needs, in Fylde, in the following eight broad locations:

- Poulton-le-Fylde Industrial Estate Extension
- Boundary Road, Lytham
- Blackpool Airport (Squires Gate Lane)
- Whitehills (Junction 4, M55)
- Whyndyke Farm (Junction 4, M55)
- Greenhalgh (Junction 3, M55)
- Kirkham (west of current settlement boundary)
- Wesham (north west of current settlement boundary).

2.192 Collectively, these opportunities could provide up to 83 ha of land, 2.5 times Fylde's maximum identified land requirements to 2030. 34 ha (41 percent) of the opportunity land was around Junction 4, M55, while another 34 ha was around Junction 3 and Kirkham.

Fylde – Regeneration Plans and Policies

2.193 This Section considers the key regeneration plans and policies, both borough-wide and town specific.

Fylde Economic Development Strategy and Action Plan – Fylde Borough Council, 2013

2.194 This document was concerned with promoting the economic prosperity of the Borough within its regional and sub-regional context and specifically how the public sector, primarily the Borough Council and its partners, can help support the development of the economy.

2.195 11 strategic themes were discussed in this strategy document which, when considered together, form the basis of the economic strategy for the Borough of Fylde. The themes of most relevance to economic development include:

- *“Theme 1: Partnership Working - ‘The Council will seek to enhance the productiveness of the local economy by working effectively with a range of partners including public sector organisations, the third sector and private enterprise.*
- *Theme 2: Town Centres – The Council and its partners will continue to support the long term vitality and viability of its town centres through a series of actions and interventions, working through local partnerships.*
- *Theme 3: The Visitor Economy – The visitor economy is a major element of the broader economy of the Fylde, providing high levels of employment and making a major contribution to the economic prosperity. The Council and its partners will continue to support the growth of the visitor economy.*
- *Theme 4: Investment Enquiry Handling and Relationships with Businesses –The Council and its partners will endeavour to support investment into the Borough. The attraction of capital and investment leads to the creation of economic output or wealth and employment opportunities. The Council will embed a presumption in favour of sustainable development to support this key economic activity.*
- *Theme 5: Enterprise Zone, Warton – Land at BAE Systems, which is a designated Enterprise Zone, will be a focus for economic growth and job creation in the Fylde.*

The redevelopment of part of this site as a key location for advanced engineering and manufacturing businesses will see the creation of significant new employment opportunities.

- *Theme 6: Infrastructure – Creating links and connections from the Fylde to the national network will be essential for prospective growth. High quality connections within the Borough will assist in the movement of people, goods and information, considerably enhancing economic growth opportunities.*
- *Theme 7: Employment Sites and Premises –The Council will ensure that an appropriate supply of developable employment land is available to support the needs of businesses. And that this employment land is in locations that are both economic, environmentally and socially sustainable. The Council will also ensure that in making this provision of employment land that the availability and suitability of premises is also taken into account.*
- *Theme 9: Rural Economic Development –The Council and its partners will work collaboratively to help sustain and enhance the economy of the rural parts of the Fylde, including the diversification of rural business and buildings to create new economic growth and job opportunities.*
- *Theme 11: Energy and Climate Change – The Council and its partners will work together to ensure that the economic opportunities created by Government energy policy are maximised in the Fylde.”*

2.196 Table 6 identifies the key actions for partners, linked to those themes.

Table 6 - Fylde Economic Development Strategy and Action Plan, Themes and Key Actions

Theme	Key Actions
Theme 1: Partnership Working	<ul style="list-style-type: none"> • Liaise with partners to develop specific projects that are contained within the strategy and action plan • Create specific partnerships to implement the projects contained within the action plan, for example town centre partnership working, the development of the skills agenda or submitting joint bids with other partners with the objective of attracting funding • Work closely with the Lancashire Enterprise Partnership on specific issues and projects • Work closely with the private sector and encourage the private sector to engage within itself to create important networks for mutual benefit • Work with local authority partners to promote the economy within the various sectors and in the preparation of developing and formulating strategy at a strategic as well as local level • Continue support for strong representation for developing the Fylde Coast economy, working in partnership with local authority partners on matters of interest to the coast as a strategically important location.
Theme 2: Town Centres	<ul style="list-style-type: none"> • Consider establishing town centre forums or partnerships to represent the various stakeholders of the town centres • Create baseline data from which to measure the health of the town centres • Continue to support appropriate development in town centres including mixed uses where appropriate • Work with other partners to market the town centres and encourage additional activity e.g., through events such as farmers’ markets and carnivals • Explore available options to help support the formation and survival of town centre businesses • Explore the options available to offer ‘local discounts’ on NNDR (Business Rates) • Explore options for ‘meanwhile’ uses of vacant town centre properties especially making use of social enterprises • Explore options for local reward schemes.
Theme 3: The Visitor Economy	<ul style="list-style-type: none"> • Enhance the provision of visitor information • Market and promote the attractions of Fylde nationally and internationally and work with partner organisations, including the private sector, to increase the value of the visitor economy • Promote new segments of the visitor market to include eco-tourism and market the natural beauty of the Fylde • Promote new segments of the leisure market, including beach sports, and support events at the international, national and local level • Protect key visitor locations/holiday zones from non-tourism related uses and development • Seek to develop key sites which have the potential to contribute to the visitor economy including ‘The Island’ • Increase the number of day and staying visitor numbers and the overall economic value of the sector • Actively support tourism and the visitor economy in appropriate rural locations e.g., farm produce shops • Develop the proposals for the establishment of a ‘Classic Resort’ for St. Annes • Seek to promote and enhance the intrinsic character, beauty and tranquillity of Fylde’s countryside and coastline as a key contributor to the visitor economy.

Theme	Key Actions
<p>Theme 4: Investment Enquiry Handling and Relationships with Businesses</p>	<ul style="list-style-type: none"> • Seek to ensure a supportive corporate (within the Council) approach to investment and development • Proactively foster good and productive relations with investors and developers • Collect and assess information about the land and premises available or potentially available for development or investment • Proactively seek to provide appropriate information and guidance to investors and developers which could ultimately lead to investment into Fylde • Develop a critical friend role within the planning system for major planning applications which have a clear benefit for economic growth and job creation • Develop a ‘fast track’ or performance based approach to the consideration of major planning applications which have a clear benefit for economic growth and job creation • Ensure appropriate information and advice is openly available through the most appropriate means (website, printed etc.) • Ensure appropriate systems and protocols are in place between all public sector partners dealing with investment enquiries • Develop and maintain good and productive relations with landowners and commercial property agents • Develop and maintain good and productive relations with indigenous businesses.
<p>Theme 5: Enterprise Zone, Warton</p>	<ul style="list-style-type: none"> • Be responsive and supportive to enquiries from developers in connection with potential development within the zone • Offer timely and prompt planning advice to potential developers within the zone • Work with partners to roll out local development orders for the remaining parts of the zone at the appropriate time • Assist in the preparation of the proposed master plan for the zone.
<p>Theme 6: Infrastructure</p>	<p>Council and its partners will support the following projects:</p> <ul style="list-style-type: none"> • Blackpool Airport • Construction of the Heyhouses link to the M55 • Improvements to the South Fylde Rail Line • Improved broadband connections in general and rural parts in particular • The electrification of the Preston to Blackpool line • Improvement of railway stations and their immediate environment to become accessible gateways and economic hubs • M55/J4 to Fleetwood link road ‘known as the blue route’ • The A585 Transport Corridor Study • Improvements to the energy/electricity infrastructure to accommodate growth within the energy/renewables sector • Wastewater and environmental infrastructure improvements • Improvements to infrastructure to facilitate delivery of the Enterprise Zone.
<p>Theme 7: Employment Sites and Premises</p>	<ul style="list-style-type: none"> • Set out plans and policies which are flexible enough to accommodate the needs of indigenous business growth and contraction and the needs of potential new investment or businesses to the area • Avoid the long-term protection of sites allocated for employment use where there is no reasonable prospect of the site being used for that purpose • Create and maintain good and productive relations with the business community to fully ensure that their needs are understood • Develop a critical friend role within the planning system for major planning applications which have a clear benefit for economic growth and job creation • Develop and maintain good and productive relations with landowners and commercial property agents • Ensure appropriate systems and protocols are in place between all public sector partners dealing with investment enquiries

Theme	Key Actions
	<ul style="list-style-type: none"> • Develop a ‘fast-track’ or performance based approach to the consideration of major planning applications which have a clear benefit for economic growth and job creation.
Theme 9: Rural Economic Development	<ul style="list-style-type: none"> • Continue support for the diversification of the rural economy and farm operations, commensurate with overall sustainable planning principles • Support rural development programmes and engagement in the operation of the Local Action Group process for Lancashire • Work with partners to help secure further funding programmes for then rural area • Support the farming economy when and where possible • Actively support tourism and the visitor economy in appropriate rural locations e.g., farm produce shops • Work together to improve access to superfast broadband, particularly in rural areas • Support ‘energy farming’ especially on lower grade agricultural land, where this complements established farming enterprises.
Theme 11 Energy and Climate Change	<ul style="list-style-type: none"> • Work together to support, when and where appropriate, companies seeking to develop commercially viable energy resources • Ensure that all partner activity is well co-ordinated should any opportunities present themselves • Work together to promote the energy and chemicals assets of the Fylde coast with particular reference to Westinghouse/Springfields at Salwick and Hillhouse at Thornton benefitting from the similarities between these two sites e.g., top tier COMAH licence • Support ‘energy farming’ especially on lower grade agricultural land, where these complements established farming enterprises • Utilise the natural resources of the Fylde Coast in a manner which maximises the sustainable employment and encourages investment in key infrastructure.

Source: Fylde BC, 2013

Kirkham Futures – Future High Streets Fund

2.197 In 2021, Fylde Council secured £11 million in external funding from Future High Street Fund (FHSF), Historic England, Lancashire County Council (LCC) and Kirkham Town Council to deliver a the Kirkham Futures Programme which is a programme of projects including the acquisition and restoration of the Grade II listed Hillside, acquisition and restoration of the Former Girls Charity School, a historic Shopfront Improvement scheme, Phase 1 & 2 Public Realm Project, Health and Wellbeing Project and Cultural Programme.

2.198 The main Kirkham Futures Programme runs from March 2020 until March 2024 with funding secured from FHSF and Historic England with further works planned up until March 2025 using LCC funding secured.

Fylde UK Shared Prosperity Fund

2.199 Fylde Council secured £2.6 million from the UK Shared Prosperity Fund for the period April 2022 to April 2025. This money will support:

- Improvements to Town Centres and High Streets
- Young people who are Not in Education, Employment or Training (NEET)/at risk
- Business support measures to drive employment growth
- Capacity building and infrastructure support for local civic society and community groups.

The St-Anne's-on-the-Sea Masterplan – Fylde Borough Council, 2022

2.200 This report set out the future vision for the town and identified the 'drivers of change' and the project interventions that are expected to create the conditions for the town to thrive and the realisation of the vision.

2.201 The Vision for St-Anne's-on-the-Sea that it will become "*a family friendly beach-focused seaside town that is distinctive but complementary to the wider offer of the Fylde Coast, which also includes the entertainment focus of Blackpool and the shopping and dining attractions of Lytham.*" There were five objectives associated with this vision:

- *"Revitalisation of the town centre through the encouragement of a more diverse mix of uses and by repurposing underused space*
- *Regeneration of the Island site to fulfil its potential as an attractive, year round leisure destination meeting the demands of target visitors, following planned improvements to coastal defences and associated public spaces*
- *Enhancement of the town centre and seafront arrival experience (or 'gateways') from key transport linkages including rail and road, both of which are expecting to benefit from network and service improvements in the coming years*
- *Creation of a strong connection between the town centre and the promenade (the 'Pier Link') to maximise the economic potential and synergies across the resort as a whole*
- *Delivering high-quality and complementary pedestrian, cyclist and road environments with improved wayfinding and a clear design layout to promote connectivity and a sense of place for St-Anne's-on-the-Sea."*

2.202 The Preferred Masterplan was based around seven key project intervention areas that will together help deliver the vision for St Anne's. These were:

- The Station Gateway – transformed arrival experience. Projects to include an improved multi-storey car park (St George's Road)
- The Square – a multipurpose, flexible town centre heart that better accommodates the diversity of use of future town centres. Projects to include public realm investment and bringing in new occupiers onto the buildings on St Anne's Road East
- The Pier Link – extending the Square to ensure a strong connection with the seafront. Projects to include public realm investment, redevelopment of the Lord Derby Public House and making better use of Fylde Town Hall
- The Pier – rediscovering the value of this key seafront heritage asset. Investment in the pier and adjacent public spaces
- South Promenade and Car Park – A new southern gateway to St Anne's, a new seafront destination and an active travel hub. Projects include improvement of the Promenade and Promenade Gardens and the creation of a new southern anchor to the Promenade Gardens and enhanced gateway from the South Promenade Car Park.
- The Island Site – lifting the visitor experience of the seafront to a new level. Three options considered:
 - *“Option 1: Retain but enhance the existing buildings with a covered arcade between the Swimming Pool and Pleasure Island buildings and public realm improvements*
 - *Option 2: Redevelop the existing Swimming Pool and Pleasure Island buildings into a water park with lane swimming and small outdoor pool and new leisure, entertainment and restaurant complex*
 - *Option 3: A more comprehensive scheme, redeveloping the existing Swimming Pool, Pleasure Island and Salter's Wharf Pub into a larger attraction, including water park with lane swimming, small outdoor pool, and new leisure, entertainment and restaurant complex and other visitor attractions.”*

2.203 N.B. Funding for the masterplan was linked to a £14 million bid for Levelling Up finance. This was unsuccessful and as a result the masterplan projects are on hold at the time of writing, with the exception of a new open event space to be developed in St Annes Square. This is discussed further in Section 5.0.

Corporate Plan 2020/24 – Fylde Council, 2023

2.204 Fylde's Corporate Plan for 2020/24 has four main themes – Economy, Environment, Efficiency and Tourism. A set of ambitions are outlined for the economy and are as follows:

- *“Develop & deliver Master Plans for the town centres*
- *Support and promote appropriate development*
- *Facilitate improved transport infrastructure and connectivity*
- *Maximise the use of all council owned assets*
- *Work with partners to attract new employment and create vibrant economic communities*
- *Retain and enhance the identity of our local communities”*

2.205 Alongside the above ambitions, actions are set out to help them be achieved. They include:

- *“Develop policy to protect the character of communities i.e. heritage assets, listed features, town centre markets*
- *Implement means of influencing legislation for leasehold arrangements on residential dwellings*
- *Work with partners to deliver the M55 Link Road and other transport infrastructure i.e., rural bus routes*
- *Deliver enough housing of appropriate type, tenure, design, density and mix to meet local need*
- *Work with partners in town centres to:*
 - *increase shopping footfall and the retail offer*
 - *encourage activity after 6pm*
 - *implement a zero-tolerance litter policy*
 - *provide car parking to attract customers*
- *Consult with interested parties and agree the future use of Lytham Institute in accordance with the terms of the Trust*
- *Develop the Enterprise Zone through the Fylde Coast partnership attracting employment and new industry*
- *Support the regeneration of our towns and villages*
- *Deliver next phase of St Anne's regeneration*
- *Deliver Kirkham High Street regeneration project*
- *Progress Lytham regeneration programme*

- *Apply the Commercial Strategy to council assets and future investment to secure best value*
- *Work with local business and partners to improve town centre shopping experiences and markets*
- *Explore opportunities for income generation from use of natural assets i.e. location filming, event hire*
- *Channel business rates funding opportunities to economic development.*
- *Review leases and Service Level Agreements.”*

Wyre – Planning Policy

Wyre Local Plan (2011-2031) (Incorporating partial update of 2022) – Wyre Borough Council (Adopted January 2023)

2.206 The Wyre Borough Council adopted the 2011-2031 Local Plan in February 2019. This document was partially updated in 2022 (as titled above) and was adopted in January 2023. The Local Plan’s aim is to *“promote sustainable growth balancing environmental, social and economic considerations and create sustainable communities in both urban and rural Wyre.”*

2.207 Local Plan Objectives, relevant to this Study, include:

- *“1. To facilitate investment, job creation and sustainable economic growth in Wyre, supporting new and existing businesses across the Borough, the delivery of Hillhouse Technology EZ, farming and tourism development*
- *2. To support education and skill development to give local people the opportunity to access jobs*
- *4. To help meet the diverse needs for services and facilities, as close to where they arise as possible, and ensure thriving and vibrant town, district and local centres serving the local community and visitors*
- *5. To ensure that new developments are supported by essential infrastructure, services and facilities through collaborative working with partners and stakeholders*
- *6. To improve connectivity between housing, employment, services and recreation areas by a range in transport choices; support the development of an efficient strategic and local highway network, safe walking and cycling routes and public transport services.*

- 10. *To respond to the challenge of climate change encouraging best use of resources and assets, minimising wastage and ensuring the Borough adapts to climate change.*
- 12. *To provide the basis to work with partners and stakeholders to make Wyre an attractive place to live, work, do business and visit as an integral part of the Fylde Coast sub-region.”*

2.208 Policy EP1 Employment Land Supply’ of the Local Plan allocates 32.9 ha of land within three distinct sub-markets which when considered alongside the commitments as of 31 March 2018 make up the overall supply of 47.7 ha. This overall supply met in full the employment OAN of 43ha for the Local Plan period. The 32.9 ha is contained within the following sub-market areas:

- Wyre Peninsula (20.5 ha)
- A6 Corridor (10.05 ha)
- Rural Areas (2.34 ha)

2.209 Policy ‘SA2 Employment Development’ identifies the following sites for B1 (now part of class E(g)), B2 and B8) development, totalling 4.76 ha, to meet the above need:

- SA2/1: Carrfield Works, Preesall Hill (Employment, 0.34 ha)
- SA2/2: Riverside Industrial Park Extension (Employment, 3.42 ha)
- SA2/3: South of Goose Lane, Catterall (Employment, 1.00 ha).

2.210 Policy ‘SA3 Mixed Use Development’ identifies mixed use sites which are expected to provide 15.13 ha of employment land, alongside 1,510 homes:

- SA3/1: Fleetwood Docks and Marina, Fleetwood (Mixed Use, 7.5 ha (gross) of Employment and 120 homes)
- SA3/2: Joe Lane (Land Bounded by Garstang Road, A6 and Joe Lane) (Mixed Use, 0.95 ha of Employment and 242 homes)
- SA3/3: Land West of Great Eccleston (Mixed Use, 1.0 ha of Employment and 568 homes)
- SA3/4: Forton extension, Forton (Mixed Use, 1.0 ha of Employment and 310 homes)
- SA3/5: Land West of the A6 (Nateby Crossing), Garstang (Mixed Use, 4.68 ha of Employment and 270 homes)

- 2.211 Site SA4 – Hillhouse Technology Enterprise Zone, Thornton has been identified to provide 13 ha for B1 (now part of class E(g)), B2 and B8 development and 250 dwellings toward meeting identified employment and housing needs. Site SA5 – Port of Fleetwood, Fleetwood (7.6 ha) was the site of a former Roll-On, Roll-Off ferry terminal. It is expected that the Port Related operations will resume on the site within the plan period and the site will be fully delivered. The Port of Fleetwood is a designated port and does not contribute to the employment allocations for use class B1 (now part of class E(g)), B2 and B8).
- 2.212 Finally, a broader development opportunity of up to 32.51 ha has been identified at Site SA7: Brockholes Industrial Estate Extension, Catterall. This land would form an expansion to Brockholes Industrial Estate. The site is heavily constrained however, and therefore there is no certainty for its delivery within the Local Plan period. It would be inappropriate to allocate the site towards meeting the identified employment OAN and accordingly the purpose of Policy SA7 is to *“establish the principle of employment development on this land and stimulate the market to resolve issues and bring forward the site. Any development on the site during the period up to 2031 will contribute towards the Local Plan employment land requirements.”*
- 2.213 Policy ‘EP2 Existing Employment Areas’ protects the Borough’s identified Existing Employment Areas for B1 (now part of class E(g)), B2 and B8) uses. If the employment Area is in countryside outside defined settlement boundaries the development must be of a scale and nature appropriate to the countryside location. It permits appropriate supporting uses, including cafes / canteens, crèches, and gyms provided that:
- *“a) The scale of such uses, and their location and arrangement within the employment area, means that they will primarily serve those employed in that area: and*
 - *b) There would not be a significant or unacceptable reduction on the type, quality or quantity of employment land supply.”*
- 2.214 Developments which do not accord with all the above matters and points in policy criterion 1, 2 and 3 will only be granted planning permission where it is clearly demonstrated that:
- *“a) The development is of a scale that is required to secure the development of a wider site which safeguards or provides B1 (now part of class E(g)), B2 and B8 uses; or*
 - *b) It is for a commercial use as a car, bathroom, kitchen or conservatory showroom; and*

- *c) There would not be an unacceptable reduction on the type, quality or quantity of employment land supply; and*
- *d) The development will not prejudice the long term operation of the area for employment purposes.”*

2.215 Policy ‘EP3 Existing Employment Sites’ notes that redevelopment for other uses of a site that is or last was in B1 (now part of class E(g)), B2 or B8) use outside defined Employment Areas will only be permitted if:

- *“a) (i) It is demonstrated that the site is not capable of a mixed use which would include an element of B1 (now part of class E(g)), B2 or B8) uses within the life of the Local Plan; or (ii) It is for a commercial use such as a car, bathroom, kitchen or conservatory, showroom; and*
- *b) (i) There would not be an unacceptable reduction on the type, quality or quantity of employment land supply; or (ii) The current B1 (now part of class E(g)), B2 or B8) use is incompatible with surrounding uses and causes an unacceptable level of disturbance and loss of amenity for these uses; or (iii) The community or regeneration benefits of the development outweigh the potential loss of an employment site.”*

2.216 *“Where the Existing Employment Site is located within countryside areas outside defined settlement boundaries, proposed development must be of a scale and nature appropriate to the countryside location.”*

2.217 Policy ‘EP8 Rural Economy’ notes that proposals to help diversify the rural economy, including for the provision of digital infrastructure in the rural areas of the borough will be supported by the Council. The expansion of existing businesses within countryside areas (as defined in the Local Plan Policy Map) will be supported where they meet the requirements of the Core Development Management Policies, where it is demonstrated *“the scale and nature of the activity is not detrimental to the rural character of the area”* and providing *“any new building and supporting infrastructure is necessary.”* *“Sustainable development which enhances the diversity of recreational opportunities and visitor attractions in rural areas will be supported.”*

2.218 Finally, Policy ‘EP12 Renewable Energy’ supports renewable energy schemes in principle and in terms of the points which relate to uses such as employment it states “*the development of renewable or sustainable energy schemes, including, but not limited to, district heating, biomass, hydroelectricity, solar, ground source heat, will be supported subject to the Core Development Management Policies, taking into account the cumulative impact of the proposed development along with other planned, committed or completed development.*”

Wyre – Planning Policy Evidence Base

Wyre Employment Land and Commercial Leisure Study – Wyre Borough Council, 2012

2.219 Wyre Borough Council commissioned the Wyre Employment Land and Commercial Leisure Study (ELCLS) in 2012 to support the development of the Local Plan and assess the future growth and floorspace requirements for employment land and commercial leisure up to 2029.

2.220 The report found that, as of 2012, Wyre contained some 583,000 sqm of E(g)/B-Class floorspace. 88 percent of that total stock comprised industrial or warehouse uses while office stock only made up 12 percent of total employment space.

2.221 The study forecasted future land requirements using five different scenarios, the results of which are summarised In Table 7.

Table 7 – Wyre ELCLS Forecast Scenarios, 2011-2029

Scenario		Net Need, ha	Gross Need, ha
Econometric Demand Forecasting	Experian Baseline	(8.48 ha)	33.87 ha
	Past Trend Jobs	8.50 ha	50.85 ha
Past Take Up	Take Up Projections	37.98 ha	80.33 ha
Labour Supply	ONS SNPP 2010-based population projections	(0.62 ha)	41.73 ha
	Housing Needs Requirement – PopGroup Baseline	0.35 ha	42.70 ha

Source: Wyre Borough Council, 2012

- 2.222 From the projections, the study concluded that *'the Borough requires around 45 ha (gross) to meet employment land needs up to 2029.'* This reflected Wyre's potential for economic growth but also the constrained nature of large parts of the Borough, in terms of accessibility, an ageing population and moderate recent take up rates, as well as modest forecast jobs growth to 2029.
- 2.223 The report referenced Wyre's Annual Monitoring Report (2010/11) which indicated that the Borough had an estimated 91 ha of available employment land, at that time. That figure was based on the remaining employment sites allocated within the previous 1999 Wyre Local Plan (10.35 ha), the Fleetwood Thornton Area Action Plan (75.94 ha, including 46 ha at the Hillhouse Secure Site), the Wyre 1st Deposition Draft (2.7 ha) and sites with extant planning permissions (1.86 ha). This supply was notably higher than the combined stock of land in Blackpool and Fylde, at this time.
- 2.224 It was concluded that while the Borough did have a good supply of available employment land, some 83 ha, this portfolio was unbalanced, with the majority of allocations being in the urban west of the Borough. Consequently, the study recommended a revised portfolio which *'should comprise 29 employment sites, totalling 40.2 ha (net) of employment land with the potential for a further 8.6ha of land allocated as part of two larger mixed use schemes.'*
- 2.225 In terms of commercial leisure and entertainment facilities, it was deemed there was not any specific shortages that the Local Plan needed to address.

Wyre Local Plan Commercial Market Review – Wyre Borough Council, 2015

- 2.226 The purpose of the market review was to determine whether different sub-markets exist and operate within the Borough and to assist the Council in selecting Employment Allocations for the new Local Plan. The review considered several property market indicators including a stock review, take-up and vacancy levels, rental levels and capital values, and market and occupier analysis.
- 2.227 Three main submarkets were identified within the Borough:
- A6 Corridor (Garstang and Catterall) – Accommodating 46,200 sqm of existing employment floorspace

- Wyre Peninsular (Poulton-le-Fylde, Thornton Cleveleys and Fleetwood) – Accommodating 256,200 sqm of existing employment floorspace
- Rural Areas (Rural West, Central Rural Plain and Rural East and Uplands) – Accommodating 18,600 sqm of existing employment floorspace.

2.228 Core conclusions of the Study were that larger accommodation types were concentrated in a few selective employment areas on the Wyre Peninsular including Copse Road, Hillhouse Secure Site, Burn Hall and Poulton Industrial Estate. The Study could not completely rule out the possibility of larger development on these particular sites, but it was considered unlikely that larger logistical accommodation, broadly units of more than 3,000 sqm each, would come forward in the Borough due to the more remote locations and infrastructure provision relative to the wider North West.

2.229 Comparatively low rental values and yield levels, at least in 2015, meant that limited amounts of speculative development would be developed in the short to medium term. Future development was expected to be on a smaller scale, based on the specific requirements of individual businesses.

2.230 There is a degree of sectoral specialisation in the differing submarkets. This includes businesses focusing on servicing agricultural industries in Garstang and Pilling, fish processing industries in Fleetwood, chemical industries at Hillhouse, and additional locally based industries in Thornton-Cleveleys and Poulton-le-Fylde. However, in each sub-area the actual number of businesses and floorspace falling into those specialist sectors was modest and most business stock is in much more general uses.

2.231 The report stated that the optimal solution for facilitating the development of new employment space in the Borough and to enable locally based companies to expand was to ensure that future allocations were provided where possible within the main submarkets in the Borough, following the existing concentrations of accommodation. Specifically:

- A6 Corridor (Garstang and Catterall) – A singular market that could be served by one allocation of employment land to which businesses from across the sub-area could look to
- Wyre Peninsular (Poulton-le-Fylde, Thornton Cleveleys and Fleetwood) – While also an interconnected market, the presence of more defined clusters here should be

served by their own allocations. It was considered that adequate amounts of employment land at the Port of Fleetwood (South) and at the Hillhouse Secure Site will need to be provided to support the future expansion of these industries. Land may also be required to support more general growth elsewhere although the opportunities for this may prove limited

- Rural Areas (Rural West, Central Rural Plain and Rural East and Uplands) – Limited rural growth sites may be required although larger businesses may be able to meet their own growth needs.

Wyre Employment Land Study Update – Wyre Borough Council, 2015

2.232 Wyre Borough Council commissioned a 2015 update of the demand forecasting elements of the 2012 ELCLS. The Study found that the Borough’s over-supply of employment land had increased from around 26 years of forward supply in 2012 to 36 years. This increase was attributed to the decline in take up rates following the aftermath of the 2008 national recession.

2.233 The study undertook seven different forecasts, the results of which are detailed in Table 8.

Table 8 – Wyre Forecast Scenarios, 2011-2031

Scenario		Need, ha
Econometric Demand Forecasting	Experian Baseline	56
	Experian Baseline (adjusted)	53
	Policy On (realistic)	60
Labour Supply	Labour Supply: 215 dpa [SNPP-2012]	43
	Labour Supply: 280 dpa [PG-10Yr]	44
	Labour Supply: 360 dpa [PG-10Yr-X] (OAN)	48
Past Completions		67

Source: Wyre Borough Council, 2015

- 2.234 In light of the above forecasts, the study stated *“The Borough requires between 43 and 67 ha (gross) to meet employment land needs up to 2031. This represents a narrowing of the previous ELR’s range of between 34 ha – 80 ha but is mainly above the previous recommended OAN of 45 ha due to high econometric and labour supply projections and a longer time period for assessment.”*
- 2.235 *“The 43 ha – 67 ha range accommodates Wyre’s SHMA; the need to revitalise current poor quality stock and the imbalance of the portfolio in terms of the geographic location of the properties currently available. It allows for the continued demand for B8 floorspace (particularly from indigenous companies) whilst factoring in the macro-economic uncertainties and practicalities of delivering employment land in an area driven primarily by indigenous demand which would preclude a step-change in delivery. The range also accommodates the potential need for emerging manufacturing, utilities, and renewable sectors.’* While it also recognised that, *‘If the authority seeks to accommodate new developments of large-scale warehousing schemes (which has not been the case in the past), then this could necessitate higher levels of provision well above the current portfolio.”*
- 2.236 The Study found that the Borough had a substantial employment land supply of around 92 ha net. However, that this portfolio is geographically unbalanced, with the majority of allocations in the urban west of the Borough and limited provision in the rest of Wyre. Specifically, there was demand for new employment sites to come forward along the A6 Corridor.
- 2.237 Considering a number of factors, including the uneven spread of employment allocations, the study recommended adjustments to the portfolio which would give a net allocation of 54 ha to meet identified needs.

Wyre Addendum 1: Wyre Employment Land Study Update Addendum Report – Wyre Borough Council, 2015

- 2.238 The original Wyre Employment Land Study Update (discussed above) used employment projections from Experian’s March 2015 data release for Wyre Borough as the basis of its labour demand forecasting scenarios. This was then used to project the quantity of employment land the Council should cater for across the Plan period.

- 2.239 This Addendum provided a short critique of the alternative local area-based econometric projections provided by Oxford Economics (OE) and Cambridge Econometrics (CE), which also provided assessments of labour change, by sector, to 2031. The forecasts were translated into employment land requirements and a judgement made as to whether any future adjustments should be made to the employment land OAN range for Wyre Borough as a result.
- 2.240 The CE projection suggested that the need for employment land will be in the order of 36.2 ha. This was below both the Experian (adjusted) projection used in the original Wyre Employment Land Study Update and was limited to a need to replace lost stock due to a minimal level of forecast net job growth in the B-class sectors over the period 2011 to 2031. Some 7ha below the lowest labour supply scenario, the CE projections give little linkage between the employment land OAN and projected housing needs.
- 2.241 The CE job growth projection indicated a relatively low level of job growth between 2011 and 2031. It was also possible that the BRES coding error relating to Business and Support Services in 2010 was not fully corrected in the data and resulted in a higher level of growth in this sector going forward. For these reasons it was considered that in this instance, less weight could be attached to the CE projections when identifying Wyre Borough's employment land OAN.
- 2.242 As for the OE projections, they forecasted a similar level of jobs growth as the adjusted Experian projections, albeit with lower final employment land requirements due to an assumption that most growth would be in higher density office employment (which requires less floorspace and land per job) rather than lower density B8 distribution. The overall requirement, at 49 ha, was just 4 ha below the adjusted Experian figures. Hence it is unlikely that if the Policy On scenario assumptions used the OE forecasts as a base rather than the adjusted Experian projections, there would be a marked difference in the resulting level of employment land need.
- 2.243 On balance therefore, it was considered that the Wyre Employment Land Study Update range of 43-67 ha based on the Experian projections remained robust in the light of the OE and CE sensitivity tests that were modelled.

Wyre Addendum 2: Analysis of Housing Need in light of the 2012 Sub-National Household Projections and ELS Update – Wyre Borough Council, 2016

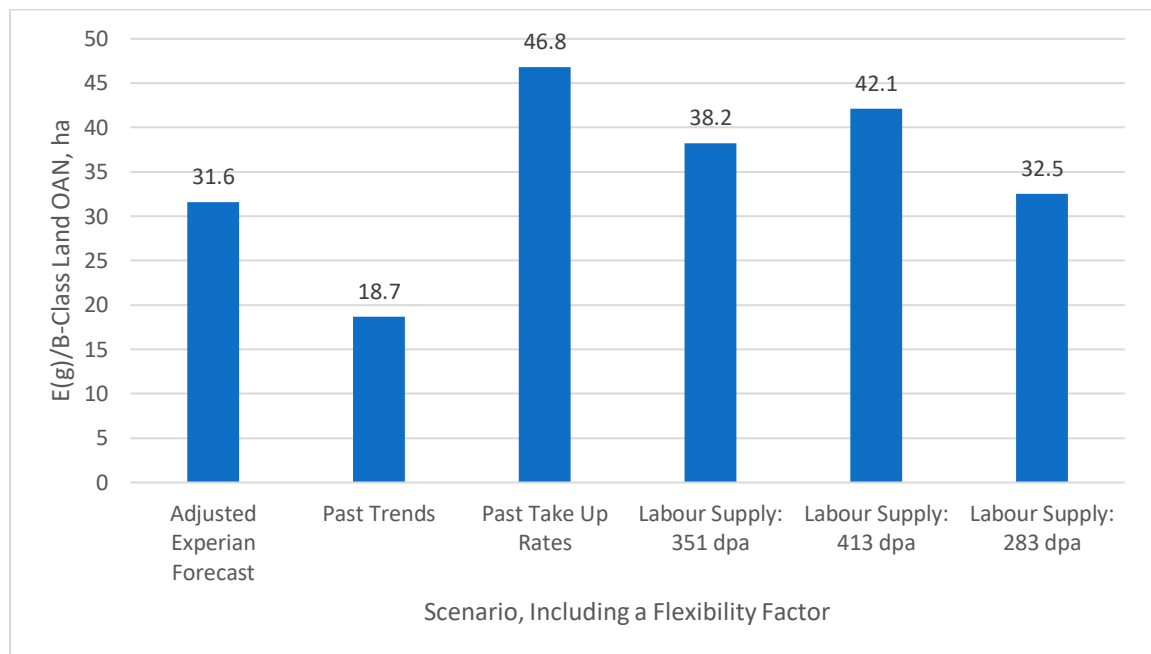
- 2.244 The 2015 Employment Land Study Update represents an important update to Wyre's evidence base and replaces the input employment growth assumptions used within the 2013 Strategic Housing Market Assessment (SHMA) and Addendum 1 report.
- 2.245 The presentation of updated economic evidence within the 2015 Employment Land Study Update also led to an updating of modelling assumptions used in aligning labour force change and likely job growth. The 2015 Employment Land Study Update recognised that adjustments were made by Experian when translating job growth into labour force growth, and there were also uncertainties about how job growth can be aligned with population change. To reflect these uncertainties, a range of sensitivities have been considered in this report, developing the consideration of these factors in the 2013 SHMA and the Addendum 1 report, discussed above.
- 2.246 On the basis that the 2015 Employment Land Study Update Addendum 1 did not propose any adjustment to the range of need for employment land required, it was assumed that the Experian Adjusted scenario remains representative to inform the OAN for housing, recognising the importance of aligning these two important strands of the evidence base.
- 2.247 The summary of the evidence presented in this report highlighted a number of implications for considering an updated OAN in Wyre. Supporting the adjusted Experian forecast level of job growth within the 2015 Employment Land Study Update requires a further uplift. This reflected the ageing population of Wyre, which impacts on the future size of the labour force. The analysis considered a range of labour force sensitivities, which suggests – as a minimum – that 400 dwellings per annum would be needed to support job growth. The range, however – recognising the uncertainties in aligning jobs and houses – extended to 479 dpa, which represented a scenario which does not directly make more marked changes to older persons economic activity rates. This range aligned with the conclusions of the 2015 Employment Land Study Update.

Wyre Addendum 3: 2015 Wyre Employment Land Study Addendum II – Wyre Borough Council, 2017

- 2.248 As noted above the Wyre Employment Land Study Update (2015) concluded that Wyre Borough's OAN range was between 43 ha to 67 ha of employment land to 2031. This

range of need was broadly supported in the subsequent Wyre Employment Land Study Update Addendum Report (2015), again as noted above. This 2017 Employment Land Study Addendum revisited the Experian projections and the past take up/losses data, using more recent information, to produce a new OAN to 2031 of 19 ha to 47 ha, i.e. below the previous OAN range (see Figure 4).

Figure 4 – Wyre Forecast Scenarios, 2011-2031



Source: Wyre Borough Council, 2017

2.249 The main differences between the two OAN ranges can be explained by *“the significant fall in the job projections, aligned with the reduction in completions and losses recorded by WBC following a re-evaluation of its monitoring processes.”*

2.250 In terms of where the OAN may reasonably lie, it is considered that limited weight should be afforded to the past trends job projections given that the majority of past growth has been in non E(g)/B-Class sectors. *“Those areas of the economy that the Borough has a competitive advantage, notably manufacturing, energy and chemicals, which the Council and other development partners are seeking to facilitate through mechanisms such as the Hillhouse Technology EZ, barely feature in recent trends. Furthermore, the past trend covers a period of unprecedented economic disruption, including the 2008/09 recession, that significantly suppresses future trend-based growth.”*

- 2.251 *“As for the past take up rates, whilst they are helpful as a realistic and relatable projection similar to the old ‘predict and provide’ approach to employment land planning, they are based on a narrow timeframe of only 6 years and therefore do not provide evidence over a full development cycle.”* Accordingly, the most weight should be attached to an OAN range of 32 ha to 47 ha, reflecting the Labour Supply Scenarios identified in Figure 4 above.
- 2.252 It is recommended that around two thirds of employment land allocations should be identified for industrial and warehousing uses, and the remainder for office and research and development uses.

Wyre – Regeneration Plans and Policies

- 2.253 This Section considers the key regeneration plans and policies, both borough-wide and town specific.

Hillhouse Technology Enterprise Zone Masterplan – Wyre Council, NPL Group, Hillhouse Technology Enterprise Zone Lancashire, 2018

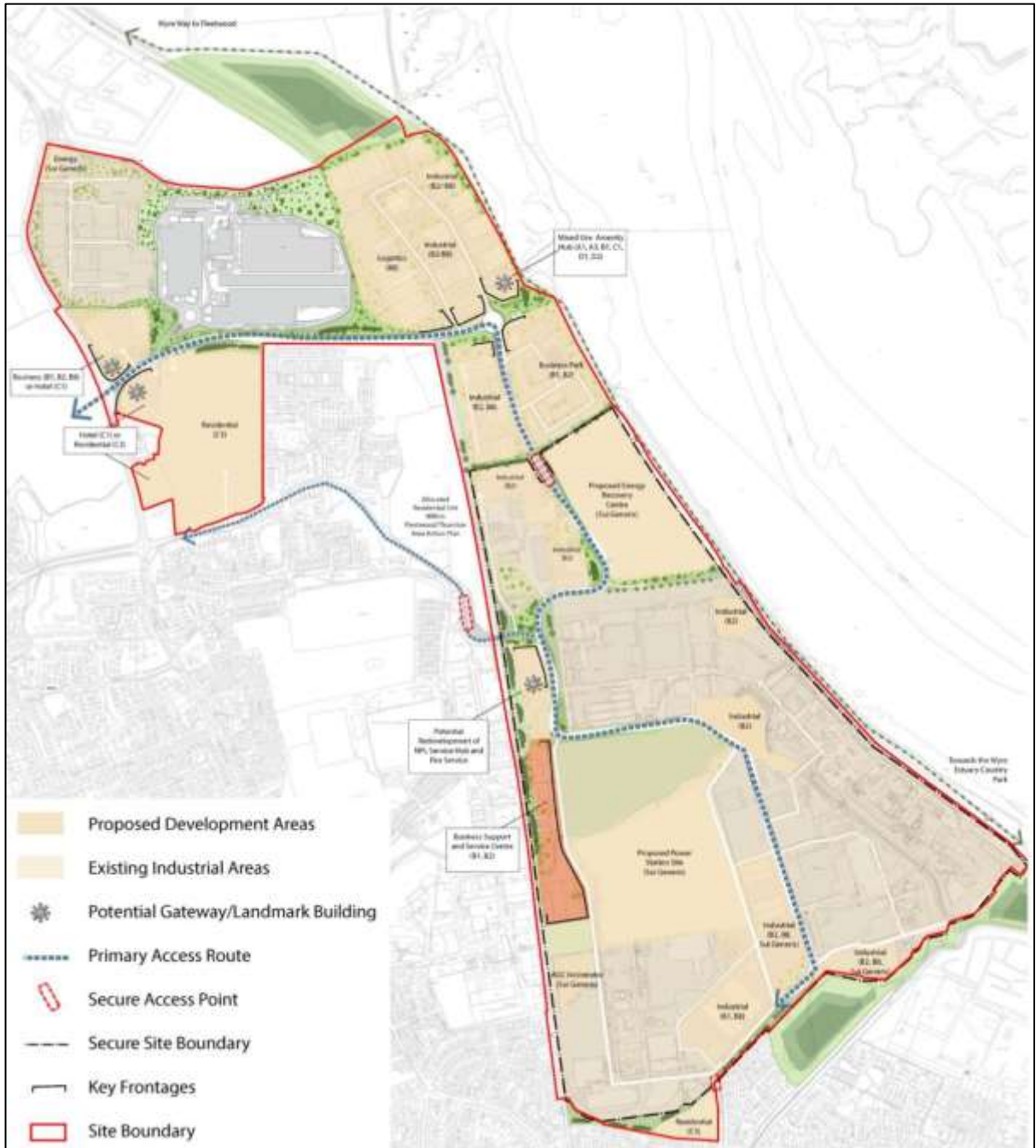
- 2.254 The Hillhouse Technology Enterprise Zone (EZ) Masterplan was developed in 2018 to serve as a framework for development for a 25-year period, by a consultancy team including BE Group. This Masterplan is presently being updated. Hillhouse International became an EZ in 2016 and offered Government financial incentives including Business Rates Relief and Enhanced Capital Allowances, now largely lapsed, to businesses with the ambition of growing employment to 3,000 jobs, from 1,650 jobs in 2018, by 2035. It was envisaged that development would be ongoing to 2041.
- 2.255 The Local Plan allocated the entire Hillhouse International EZ for mixed-use development, requiring the site to deliver 250 dwellings and at least 13 ha of employment (E(g), B2 and B8) development. It was envisaged that industrial and energy uses would make up the bulk of employment development, followed by plots designated for business uses.
- 2.256 The Masterplan Vision was that Hillhouse will become: *“A high quality riverside residential and employment site, offering well connected premises for world leading chemical and energy production, logistics and manufacturing.”* Objectives to achieve that included:
- Objective 1: Meet the Demand from a Diverse Range of Sectors
 - Objective 2: Provide Improving Accessibility

- Objective 3: Deliver Critical Infrastructure
- Objective 4: Marketing and Promotion
- Objective 5: Support Competitive Businesses, Knowledge and Innovation
- Objective 6: Deliver Efficient and Functional Employment Plots
- Objective 7: Create an Active, Productive and Liveable Environment
- Objective 8: Build a high quality neighbourhood.

2.257 Key zones of Hillhouse included the Southern Secure Area, a focus for the existing chemical operators which have growth aspirations and a number of energy projects, alongside supporting industry services. Also, the Northern Open Access Area to be opened up through the creation of the northern access road and associated new north-south road, which will form the spine road of this area. The Northern Area would appeal to a broader array of businesses, including those that serve a more localised function, subject to emerging demand, alongside support facilities such as meeting rooms, conference facilities, café, takeaway, gym, etc. The central hub could act as a catalyst to attract office and research/laboratory uses to the EZ.

2.258 More peripheral sites near the B5268 which were outside of the security perimeter could support uses including a hotel. Residential sites were identified in the masterplan with the main residential site of 7.7 ha being the former Sainsbury's site and adjacent playing fields in the west of the EZ area. The second residential site was a smaller plot in the south of the EZ, then being used as AGC offices (See Figure 5).

Figure 5 - Hillhouse Development Areas

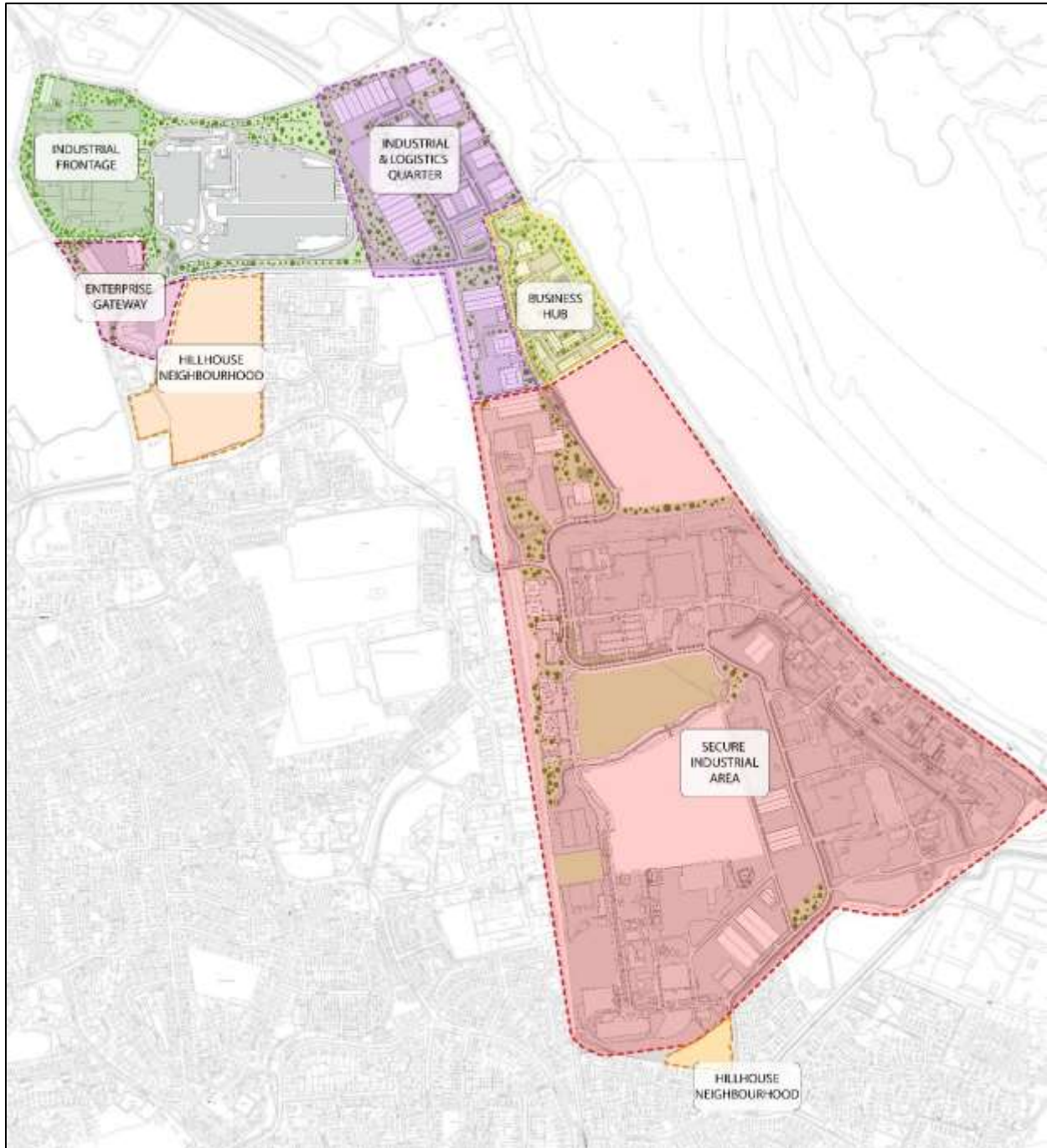


Source: Wyre Council, NPL Group, Hillhouse Technology Enterprise Zone Lancashire, 2018

2.259 Work would include the creation of a new access road off the roundabout on Fleetwood Road North (B5268) and a range of other transport infrastructure investments. The Masterplan divides the EZ into six character areas (see Figure 6):

- *“Enterprise Gateway – The Enterprise Gateway will act as the primary access point into the site, defined through a new access road along with several landmark buildings, catered towards industrial, business and commercial related uses*
- *Hillhouse Neighbourhood – The Hillhouse Neighbourhood will be the home of a new residential development within Thornton-Cleveleys with scope for 250 accessible, high quality, well designed homes for the local community.*
- *Industrial and Logistics Quarter – The Industrial and Logistics Quarter will deliver a diverse typology of light industry, manufacturing and logistics property with a mix of building and plot sizes and scales. Large floor plates will be located to the north of the new access road, making the most of the space available, whilst smaller industrial plots will be located adjacent to the proposed business hub to make the most of key business connections.*
- *Business Hub – The Business Hub will consist of the development of a new business park featuring new landmark buildings and an active amenity hub, offering services for businesses and the working community. The hub will create an environment that promotes the delivery of architectural quality and high quality business operation.*
- *Secure Industrial Area – The masterplan will preserve and enhance the existing secured industrial area within the Enterprise Zone offering industrial, manufacturing, commercial and logistics related uses along with related services. This is supported by secondary secure access points into the site from Bourne Road and Hillylaid Road, to create a secure, safe and efficient space for businesses and employees. The secure area will be enhanced through building stock improvement, better designed highway and landscaping (including an internal recreational loop), as well as the potential for a dedicated amenity space within the secure area.*
- *Industrial Frontage – The Industrial Frontage will consist of the development and optimisation of the existing Burn Hall Industrial Estate, contributing to creating an accessible and high quality employment area that defines the quality of the Enterprise Zone.”*

Figure 6 - Hillhouse Character Areas



Source: Wyre Council, NPL Group, Hillhouse Technology Enterprise Zone Lancashire, 2018

Cleveleys Town Centre Regeneration Framework – Wyre Borough Council and the Cleveleys Together Partnership Board, 2021

2.260 The Cleveleys Regeneration Framework has been prepared in order to guide the development of Cleveleys Town Centre for the next 10-15 years. The overarching vision is that *“Cleveleys is a ‘real town’ by the sea – happy to be next to, but different from, its neighbours. A friendly, welcoming and accessible place for all of its local communities and for visitors. A town proud of its past but looking forward to being an even better version of itself in the future.”* There are eight components or themes to the strategy:

1. *“The High Street - Environment and public realm*
2. *Heritage and Culture*
3. *Transport and Linkage*
4. *Community, Health and Wellbeing*
5. *Residential*
6. *Sustainability and Low Carbon*
7. *Digital Technology, Education and Skills*
8. *Business and economy.”*

2.261 Overall, Cleveleys Town Centre was not found to be underperforming when measured against the usual metrics of a town centre health check – vacancy rates, values, footfall etc. However, it was suggested that this may mask a slow, relative decline. *“For example, shop vacancy rates may be low, but does the type and quality of the offer always match customer expectations? Are trading hours, or the weekend/evening offers, keeping step with competition in other places? There are some high street and transport issues to address, and a range of non-urgent, yet still important, ones that will require attention if Cleveleys is to ensure a thriving future.”*

2.262 Key commercial projects, put forward alongside a range of public realm, community and access improvements, included:

- **1. The High Street** - Environment and Public Realm, Project No. 3: A New Indoor Artisan Market – Commercial project supported by a ‘project champion’
- **2. Heritage and Culture and the Visitor Economy, Project No. 3: A new town centre hotel** – A new hotel on the seafront. A site needs to be available
- **8. Business and Economy, Project No. 2: A business incubator space** – This Incubator space would target SMEs offering services including account management,

advice, energy efficient and low carbon technologies, resources, training, mentorship, potential private sector investment and access to workspace. These businesses would typically use the space for one to two years, this gives businesses time to set up, establish themselves in Cleveleys and grow their brand, team and connections.

Fleetwood Regeneration Framework – Wyre Borough Council, 2021

- 2.263 The Fleetwood Regeneration Framework has been prepared in order to guide the development of Fleetwood Town Centre for the next 10-15 years. The overarching objective of the study is *“to assess how Fleetwood and the wider areas of the town can sustain and grow itself and how best to support the delivery of economic growth and prosperity in the town, and in doing this, drive improvements in the quality of life of the residents and productivity of businesses.”* There are eight components or themes to the strategy, which were similarly grouped as for the Cleveleys Town Centre Regeneration Framework, as noted above.
- 2.264 Overall, the Framework Health Check identifies that Fleetwood suffers from a range of problems which impact upon the economic health and vitality of the town centre. There is a low proportion of comparison retail units and floorspace and a notable lack of cafés and restaurants suitable for families. Vacancy rates are high, and rents are low, as is footfall, and many existing retail units are in a state of disrepair and require investment while the Town Centre suffers from strong competition from the Affinity Outlet Centre.
- 2.265 The framework identifies that the economy was weak and metrics for educational attainment, wages, longevity, health and wellbeing were all below the national and regional average. Traditional industries have declined or disappeared and due to its peninsular location, the town is poorly connected to its hinterland. The town must better capitalise on its unique and attractive offer and strong local communities. To achieve, this a range of projects were put forward under the above eight themes. Key commercial projects, put forward alongside a range of public realm and access improvements, included:
- 1. The High Street - Environment and Public Realm, Project No.2: Fleetwood Market - Improvements Programme – In addition to a broader programme of physical improvement led by Wyre Council, work to include *“conversion of space above the market into studio space for craft work ‘makers’, linked to retail space in the market hall”*

- 2. Heritage and Culture, Project No.2: Development of The Visitor Centre and The Fleetwood Museum – Development of a new Visitor Centre as part of, or complimentary to, Fleetwood Museum
- 4. *Community and Residential Project No. 2: Commercially Focused Development on ABP Land* – “A commercially focused development on the only major development site within Fleetwood, adjacent to the town centre. Development scale and building form should be compatible with the adjacent town centre with a layout that recognises the geometry of the early development of the town... A Site Development Brief should be produced by Wyre Council, in partnership with the land owner, and through consultation with other stakeholders. This will establish acceptable design parameters and guide subsequent proposals. This should facilitate a smoother route through the planning process with greater certainty of good quality development. The Commercial proposal will provide new employment opportunities, an extra-care facilities and a new linear park.” Wyre Council lead on the Development Brief in liaison with the landowner and/or developer.
- 5. Sustainability and Low Carbon, Project No.1: River Wyre Tidal Barrage – A major piece of energy infrastructure and civil engineering spanning approximately 500-600 metres across the mouth of the River Wyre between Fleetwood Port and Knott End. It has been proposed by a number of organisations, most recently Natural Energy Wyre Ltd (NEW) which proposed a 90MW/hr capacity installation. The project must overcome a number of issues including environmental impact and the cost at which it will produce electricity. A multi-partner approach is needed, with committed local political support to initiate, but led by a private organisational structure.
- 9. Business and Economy Project, No. 1: Business Support Services and Spaces – This could include delivery of support services on a small scale – photocopying, binding etc. and business advice clinics to mixed-use scale support such as meeting and conference facilities in a dedicated ‘business hub’; up to provision of co - working / flexible office spaces, business incubators and live/work units. In the context of Fleetwood Town Centre, the initial focus should be on small scale support which can be incorporated into existing committed projects such as the refurbishment of Fleetwood Market (including ‘maker spaces’ for local craft businesses) and the promotion of small co - working / ‘live - work’ units as part of the repurposing of former retail space on the high street.

- 9. Business and Economy, Project No. 2: Improved Town Centre Hotel Offer – A new good quality hotel with the aim to locate it close to the town centre, potentially on the ABP port land
- 9. Business and Economy Project, No. 3: Pro-Active Pursuit of Major Investment and Improved Links to Hillhouse Enterprise Zone – A strategy to pro-actively pursue larger investment opportunities. These should include opportunities in the energy, chemical and polymer sectors, and opportunities in the tourism / leisure sector.

Garstang Town Centre Regeneration Framework – Wyre Borough Council and the Greater Garstang Partnership Board, 2022

- 2.266 The Garstang Regeneration Framework has been prepared in order to guide the development of Garstang Town Centre for the next 10-15 years. The overarching vision was that *“Garstang will be a contemporary market town – a friendly and welcoming place with both a rich heritage and a vibrant future. It will be known for its canal and river; as a focal point for its surrounding communities, and as a gateway to Lancashire’s great outdoors; but most importantly as a town with a huge community spirit.”* There were eight components or themes to the strategy which are very similar to and similarly grouped as for the other regeneration Frameworks noted above.
- 2.267 Overall Garstang Town Centre and the Greater Garstang area was not found to be underperforming when measured against the usual metrics of a town centre health check – vacancy rates, values, footfall etc. However, it was suggested that this may mask a slow, relative decline. *“For example, shop vacancy rates may be low, but does the type and quality of the offer always match customer expectations? Are trading hours, or the weekend/evening offers, keeping step with competition in other places? There seem to be no ‘burningly urgent’ issues to address, rather a range of non-urgent, yet still important ones that will require attention if Garstang is to ensure a thriving future.”*
- 2.268 Key commercial projects, put forward alongside a range of public realm, community and access improvements, included:
- **Heritage and Culture and the Visitor Economy, Project No. 2: A Heritage Centre/Archive** – A project to develop a purpose built space as a Heritage Centre and/or Archive for Garstang. This project would support and build upon work to-date by Garstang District Heritage Society

- **Heritage and Culture and the Visitor Economy, Project No. 3: Update the Market offer** – That the market trustees and operators explore opportunities to update both the appearance of the markets and the offer available
- **Heritage and Culture and the Visitor Economy, Project No. 4: Develop the town centre Food and Beverage offer** – Whilst Garstang has a number of traditional pubs, most serving food, the offer could include more with a café/bar atmosphere and a stronger ‘gastro pub’ food offering. There is also an opportunity for Garstang to offer more ‘street food’, perhaps in conjunction with the updated and extended market offer. Garstang Chamber of Trade will be instrumental in promoting this to traders. Greater Garstang Partnership (GGP), Wyre Council and others to help create environment for investment and help to remove barriers (e.g., through town centre policies)
- **Heritage and Culture and the Visitor Economy, Project No. 5: Develop an ‘outdoors hub’** – “That Garstang develop a building, or recognisable cluster of outlets that become the town’s ‘go-to’ point for information about the outdoor offer, outdoor clothing/equipment, bike hire/support (and sales), kayaking/canoeing (on the canal), cycle/walking cafés, etc. and, potentially, accommodation aimed at the ‘active outdoor’ market”. This could be a new, bespoke facility with a curated offer, potentially linked to a community building, tourist information centre or heritage centre. Greater Garstang Partnership, and Wyre Council could develop an initiative to identify, opportunities, and thereafter facilitate delivery by the private sector. Alternatively, there could be an approach to promote a particular site
- **Community, Project No. 3: A ‘young people’s market’** – The proposal is for local agencies to promote a young persons’ or ‘teenage market’, potentially associated with an expanded and enhanced market offer
- **Business and Economy Project No. 1: A “plan” for the land near Brockholes Industrial Estate at Catterall** – The Wyre Local Plan (2011-2031) identified 32.5 ha of land next to Brockholes Industrial Estate at Catterall as land for E(g), B2 and B8 employment (site SA7), although it also noted that the site is heavily constrained and therefore there is no certainty of its delivery. A masterplan is needed for the site which it is recommended should be developed to align with the objectives of this Regeneration Framework. This will require a partnership of landowners to develop proposals for the site, working closely with Wyre Council with Greater Garstang Partnership seeking an influencing and supporting role.

- **Business and Economy, Project No. 2: Support for key 3rd party projects** – That Greater Garstang Partnership monitor development proposals and business initiatives in the Greater Garstang area to determine which are aligned with and can help to deliver the local GGP Vision and Objectives. Appropriate 3rd party projects should be considered for formal or informal support.

Poulton Town Centre Regeneration Framework – Wyre Borough Council and Partners, 2024

2.269 The Poulton Regeneration Framework has been prepared in order to guide the development of Poulton-le-Fylde for the next 10-15 years. The Framework vision was identified as: *“We are Poulton. We are a contemporary shopping experience and a thriving evening economy with a strong community spirit. We have a vibrant calendar of events giving us a distinctive identity as a prosperous market town.”* In order to deliver the Vision, the objectives for the town centre were to:

- *“1. Deliver high-quality public realm improvements, including a focus on reducing the impact of traffic in order to enhance the pedestrian experience*
- *2. Make Poulton a sustainable, low-carbon town - aiming for best practice solutions to tackle energy and sustainability*
- *3. Encourage greater activity and events during the daytime and evening.*
- *4. Build on Poulton’s Localism, enhancing its current independent retail offer.*
- *5. Actively manage and programme Poulton’s town centre spaces and places.*
- *6. Promote Poulton’s strong community and local heritage.”*

2.270 Key commercial projects, put forward alongside a range of public realm, community and access improvements, included:

- **Visitor Economy, Project 2: Improve the Monday Street Market offer** - A project designed to introduce a variety of market offers, with a focus on food, and arts and crafts
- **Business Support, Projects 1: Business Support Focused on Energy** - to support high street businesses with advice and potential funding opportunities to improve building energy efficiency and carbon footprint.
- **Business Support, Project 2: Digital Training for High Street Businesses** – to support high street businesses to improve their digital skills, such as website development, content creation, or learning different software applications.

- **Business Support, Project 3: Recruit Enterprise Advisors** – enterprise advisors to help schools develop a strong career programme, helping raise students’ aspirations and awareness, including mentoring scheme in soft skills and engaging with businesses in Poulton’s network.
- **Business support, Project 4: Engage and Attract Businesses to Invest in Poulton** – developing dialogue with property owners, agents and chains to support attracting businesses to move and invest in Poulton.

Funding to Support the Town Plans

- 2.271 In December 2022 Wyre Council was awarded £3.9 million in UK Shared Prosperity Funding, and is now progressing some 15 projects, which range in scope from local creative activities like events, festivals and arts programmes, through to larger scale projects that support businesses, existing town centre CCTV upgrade, the development of community facilities and improvements to parks and public realm. Relevant projects supported include improvements to Fleetwood Market and support for businesses in achieving Net Zero targets.
- 2.272 Wyre Council have also secured £400,000 from the Rural England Prosperity Fund, to support local community infrastructure and circular economy, green space improvements, active travel enhancements and businesses. The Council recently held a call for the rural business grant programme to assist businesses diversification.
- 2.273 At the time of writing, expressions of interest were being taken for the Rural Community Facilities Fund, supported by the above funding pots, to develop and improve rural community facilities, promoting further use of community assets and encourage the provision of additional activities.

Wyre Council Climate Emergency Declaration

- 2.274 It is noted that on 11th July 2019, Wyre Council made a climate emergency declaration. Along with the goal to achieve 100 percent clean energy in the Council’s own operations, the intention is to *“ensure that all strategic decisions, budgets and approaches to planning decisions are in line with a shift to zero carbon by 2050 as far as Planning Laws allow it.”* Also, to not allow any land under its control to be used for anything that would result in the Council not meeting the target of net zero emissions by 2050.

Draft Climate Change Strategy 2024

2.275 At the time of writing, the Council’s climate change team have prepared a draft Climate Change Strategy for public consultation. The strategy outlines how the Council plan to reduce levels of pollution locally and prepare the community for the negative impacts of climate change, along with those that are already happening. The strategy includes eight objectives:

- Buildings – retrofit and decarbonise buildings and heating systems
- Transport – support decarbonised, safe and sustainable transport
- Net zero council – embed climate action across council governance and financial decision-making
- Planning – use our planning powers to plan for a low carbon and climate resilient future
- Biodiversity – protect and increase biodiversity
- Engagement – collaborate, educate and engage with others to take climate action
- Waste – reduce waste, support a circular economy and sustainable food production
- Adaptation – adapt to our changing climate.

2.276 Alongside the above objectives, actions are set out. In relation to the economy, they include:

- Net zero council, project 3.B2 – work with the Fylde Coast Economic Prosperity Board (EPB) to support economic growth and attract greener investment to Wyre when projects have been made available
- Engagement, project 6.E5 – work with businesses to encourage decarbonisation
- Waste, project 7.B1 – support a local circular economy and project 7.E2 – work with local farmers and key stakeholders to achieve sustainable farming and combat climate change.
- Adaption – project 8.C1 – work with local business to help them to make the necessary adaptations needed for climate resilience and project 8.D2 – work with local partners to upskill workers and businesses to transition to low carbon technologies.

Wyre Council Plan 2024-2028 – Wyre Borough Council, 2024

2.277 Wyre’s Council Plan has a vision that “Wyre is a place where everyone can prosper. We want everyone in Wyre to have access to jobs and share the benefits of economic growth; live in thriving, safe, more environmentally sustainable and welcoming communities; and be healthier and independent for longer”. It has four main themes – People and

Communities, Growth and Prosperity, Place and climate, and Innovative and Customer Focused. A set of ambitions are outlined for the Growth and Prosperity theme and are as follows:

- Develop Wyre’s town centres to be thriving and welcoming places to live, work and visit
- Support and champion Wyre’s growing tourism economy by promoting our coast to countryside offer, tourism businesses, attractions and events
- Grow the local economy through delivering the best support for small businesses and start-ups
- Encourage local people to develop new skills to access better paid work
- Secure external funding and investment to make improvements to places across the borough
- Promote and support low carbon businesses and jobs.

2.278 Alongside the above ambitions, actions are set out to help them be achieved. They include:

- Developing a programme of town centre improvements
- Developing and starting to deliver an economic development and tourism strategy
- Developing and delivering a comprehensive business support programme for small businesses in Wyre
- Developing and delivering a programme of support for local people to access education, employment or training
- Delivering the UK Shared Prosperity Fund and Rural England Prosperity Fund 2023-2025.

SUMMARY

2.279 This section reviewed national, regional and local reports and strategies that have a relevance to the allocation and need for employment land and premises. It is distinct from the consideration of Socio-Economic matters in the section to follow.

National Policy

2.280 The NPPF (Section 2) requires a presumption in favour of sustainable development, to support sustainable development and ensure that Objectively Assessed Needs for uses including employment land are met. Section 6 on ‘Building a strong, competitive economy’

indicates that planning policy should “*help create the conditions in which businesses can invest, expand and adapt*” supporting economic growth and productivity and accounting for both local business needs and opportunities for development. In Section 7 ‘Ensuring the Vitality of Town Centres’ it is noted the planning policy, and decision making, should support the role that town centres play in local communities, taking a positive approach to the growth, management and adaptation of uses including town centre offices. Finally, Section 11 on making ‘Effective Use of Land’ encourages reallocating land where there is no reasonable prospect of an application coming forward for the allocated use. Specifically, sites should not be held for E(g)/B-Class Uses if there is no prospect of development being progressed.

2.281 The 2020 Use Classes Order Amendment combines the B1 Office/Research/Light Industrial Uses along with the A and partly D1/ D2 uses into a single ‘E’ Use Class. For the Fylde Coast, the practical effects are likely to include some greater pressure to convert town centre offices to other uses, although the market for many of those alternative uses is suppressed at this time. The Use Class change has no spatial considerations and therefore will apply outside of town centres as well. It thus has the potential to result in the introduction of non-office/non-industrial type activities, including retail, in out of centre business parks, and industrial estates, although this is a trend which has been ongoing for some time and can, in moderation, beneficially diversify local economic activity.

2.282 PPG Notes – ‘*Housing and Economic Land Availability Assessment*’ and ‘*Housing and Economic Needs Assessments*’, alongside ‘*Making Effective Use of Land*’ provide guidance on how employment land reviews should be completed. The process can be split into five main stages, which inform this Study:

- Stage 1: Identification of sites and broad locations
- Stage 2: Site/broad location assessment
- Stage 3: Windfall assessment – Not applicable as relates to housing only
- Stage 4: Assessment review
- Stage 5: Final evidence base.

Sub-Regional Policy

2.283 Policy for the county (including the unitary authorities of Blackpool and Blackburn with Darwen) includes Lancashire 2050, a shared strategy for long term growth, based around the priorities of Economic prosperity, Environment and climate, Transport and infrastructure, Housing, Early years and education, Health and wellbeing, Employment and skills, Communities and place. Its strategic framework will be endorsed by the local authorities, other key stakeholders and align with the organisational priorities of Lancashire County Council. Action Plans will be developed around the above priorities to make cases for extra tools, powers and resources to central government.

Local – Policy Guidance

2.284 The following employment land need and supply is identified in the adopted local plans of the Fylde Coast authorities:

- **Blackpool** – The Local Plan Part 1 identifies a requirement for 31.5 ha of new employment land to 2027. Policy DM7 (Local Plan Part 2) identifies 18.97 ha of development land across the ten identified employment areas, to meet this need, as of March 2021. This included 14.15 ha at the Blackpool Airport EZ. This forms part of the 180 ha of existing business/industrial land safeguarded for B2, B8 and E(g) uses in Policy CS3 of the Core Strategy. The latest (2022) employment land topic paper indicates that Blackpool’s total employment land supply comprises 181.9 ha of land. To meet the remaining needs, 13.7 ha of employment land is provided in Fylde through the Duty to Co-operate and acknowledged in the adopted Fylde Local Plan
- **Fylde** – Based on an average take up rate of 2.22 ha/year, Fylde has a requirement for 46.6 ha to 2032. Combined with the 14 ha to meet Blackpool’s needs to 2027, as noted above, gives a total adjusted requirement of 62 ha. Strategic Policy EC1 identifies 11 sites to meet this need, including three mixed-use opportunities. 30 existing business and industrial areas are also protected under Policy EC1. The Lancashire Advanced Engineering and Manufacturing (AEM) Enterprise Zone at BAE Systems, Warton and Blackpool Airport Enterprise Zone are protected under policies EC3 and EC4 respectively for strategic employment uses and appropriate supporting uses.
- **Wyre** – An OAN of 43 ha is identified for the period 2011-2031. Policy EP1 ‘Employment Land Supply’ allocates 32.9 ha of land to meet needs which, when considered alongside the commitments as of 31 March 2018, make up an overall

supply of 47.7 ha. The new supply comprises nine employment and mixed-use sites under Policies SA2-SA4, including 13 ha at Hillhouse Technology Enterprise Zone, Thornton. Finally, a broader development opportunity of up to 32.51 ha is identified at Site SA7: Brockholes Industrial Estate Extension, Catterall, but site constraints make delivery uncertain within the Plan Period.

- 2.285 All three local authority areas seek to protect their employment areas for B1 (now use class E(g)), B2, B8 and appropriate ancillary uses. It is also noted that, in 2019 both Blackpool and Wyre Council's declared a climate emergency with the goal of achieving net zero in their own operations and encouraging a similar goal in existing business operations and future development.

Local – Regeneration Programmes and Projects

- 2.286 The Blackpool Airport Enterprise Zone comprises 144 ha of land incorporating the existing Squires Gate and Blackpool Business Park Employment Areas along with most of Blackpool Airport, north of the runway. 45 percent of the site falls within Blackpool Borough, 55 percent within Fylde Council's boundary. Blackpool Airport became an operational EZ in 2016 and the status remains active until 2041. Financial incentives offered by the EZ included Business Rates Relief, which ended in March 2022, and Enhanced Capital Allowances (available until November 2023).
- 2.287 Objectives for the EZ include to increase the number of jobs on the site by 3,400 over 25 years, from 1,600 in 2016. Also, to provide 260,000 sqm of floorspace development, conversion or repurposing. The targeted sectors for jobs growth are in Energy, Aviation, Advanced Manufacturing, Food and Drink Manufacturing and Digital and Creative sectors and back office administration. As of 2022, The Enterprise Zone has attracted over 1,600 jobs and nine developments have been completed. Future schemes included a substantial remodelling of the airport and a solar farm development to the south of the Enterprise Zone on land within the airport boundary to support the Silicon Sands development within the EZ

2.288 Other relevant regeneration programmes and projects in Blackpool include:

- Blackpool Central – A £300 million private sector leisure development. Outline plans include a major public events square, three indoor entertainment centres, a hotel, restaurants and other new hospitality and leisure spaces.
- Talbot Gateway – A multi-phase leisure and business development: Key projects currently underway includes a 144 room hotel (4 star equivalent) by summer 2024; and a Civil Services Hub and a Centre for Health and Disability (CHDA), which will accommodate 3,000 DWP staff by spring 2025.
- Multiversity – The relocation of the Blackpool and the Fylde College’s Palatine Road campus to a new carbon neutral university site in the town centre.
- The Edge – Incubation Office Space in Stanley Buildings – provision of high quality, managed workspace for start-ups and small businesses within the Town Centre.

2.289 The Lancashire Enterprise Zone at BAE Warton is identified in Fylde Local Plan Policy, as noted above and is protected for relevant employment led developments. To date, there has been no development of new E(g)/B-Class premises here, which do not directly serve BAE, with the focus of development being at the related facility at Samlesbury, South Ribble/Ribble Valley. This Enterprise Zone is discussed in more detail in Section 5.0.

2.290 In ‘*Strategic Policy EC3: Lancashire Advanced Engineering and Manufacturing (AEM) Enterprise Zone at BAE Systems, Warton*’ it was noted that the Council continues to support the specialised activity at BAE Systems, Warton, in line with the company’s operations. The designation of the Lancashire Enterprise Zone at BAE Systems, Warton will help create more businesses, jobs and attract international investment, with positive benefits across the wider economic area. It will help improve the local economy and also increase the contribution to national growth. A Local Development Order and a Masterplan have been produced at this location.

2.291 In Wyre, Hillhouse became an EZ in 2016 and offered Government financial incentives including Business Rates Relief and Enhanced Capital Allowances, now largely lapsed, to businesses with the ambition of growing employment to 3,000 jobs by 2035, from 1,650 jobs in 2018. As noted, 13 ha of employment land was allocated here in the Local Plan.

2.292 Key zones of Hillhouse included the Southern Secure Area, a focus for the existing chemical operators which have growth aspirations and a number of energy projects, alongside supporting industry services. Also, the Northern Open Access Area to be opened up through the creation of the northern access road. The Northern Area would appeal to a broader array of businesses, including those that serve a more localised function, alongside support facilities.

3.0 SOCIO-ECONOMIC PROFILE

INTRODUCTION

- 3.1 This chapter sets out the socio-economic conditions of Blackpool, Fylde and Wyre and provides context that shapes employment land demand and supply factors in the study area following on from the Covid-19 pandemic, and other macroeconomic factors that influence the economy. It establishes an updated economic baseline for the Fylde Coast sub-regional area and Blackpool, Fylde and Wyre individual authority areas.

PURPOSE

- 3.2 The overarching purpose of the Socio-Economic Profile is to provide a strong and comprehensive evidence base for the Fylde Coast to inform the wider Employment Land Review and Local Plan. Specifically, the aim of the chapter is to:
- Provide detailed analysis of the local economy in the Fylde Coast, identifying key economic drivers
 - Assess trends in the economy over recent decades and the impact of relevant policies and other macroeconomic factors
 - Provide insight on future forecasted trends in employment supply and demand

This will culminate in an overarching assessment in Section 8.0 regarding how this may influence the Objectively Assessed Needs for employment land across the Fylde Coast.

- 3.3 Shown here is analysis of key indicators that influence employment, including population and business demographics, movements in the labour market and associated skill levels, deprivation indices, migration patterns, and future anticipated employment trends. Throughout the chapter the most recent data available is used together with older data sets for comparison. Where available, regional and national comparators are also shown.

DEMOGRAPHIC ASSESSMENT

Population Change

3.4 Table 9 below provides the population change figures over the past decade for relevant areas, utilising Census data. Blackpool has the largest population out of the three local authorities, with Wyre having the second largest and Fylde the smallest. By local authority area, the following can be noted:

- **Blackpool** - As was observed in the 2011 report 'Local Economy Baseline for Blackpool', Blackpool's population fell by 9,000 residents over 1981-2010, reducing from 149,000 to 140,000 or a 6.0 % change. In that period growth was only observed in the early 1990s and early 2000s. Over 2001-2011 the population was largely unchanged, with a net decline of 183. By 2021, the population had decreased by 1,000 or 0.7 %. Thus, Blackpool's population has been declining over the past 40 years, albeit at a smaller rate of decline over the past decade (2011-2021).⁶
- **Fylde** – Fylde's population has grown consistently through the 21st Century, with a 7.4% population gain over 2011-2021 higher than the England average population change by 0.8 percentage points.
- **Wyre** – Growth in Wyre was more modest than in Fylde with a 3.9% population gain over 2011-2021, which is only three quarters of the North West rate of growth and 60 % of the English average. However, there is still a clear trend of growth in Fylde and Wyre that is not evident in Blackpool.

3.5 Whilst each authority area has its own individual population trends, overall the population has increased across the Fylde Coast when looking at the combined results of the three local authorities.

⁶ N.B. Figures here are based on Census data and will not fully accord with data in the Local Economy Baseline for Blackpool (2011) which was based on ONS Mid-year Population Estimate

Table 9 - Population breakdown by local authority

	2001	2011	2021	Change 2011-2021 ⁷	
				No.	Percent
Blackpool	142,283	142,100	141,100	-1000	-0.7
Fylde	73,217	75,800	81,400	5,600	7.4
Wyre	105,618	107,700	111,900	4,200	3.9
Local Authorities Total	321,118	325,600	334,400	8,800	2.7
North West	6,729,764	7,052,177	7,417,300	365,123	5.2
England	49,138,831	53,012,456	56,489,800	3,477,344	6.6

Source: Census 2011; Census 2021

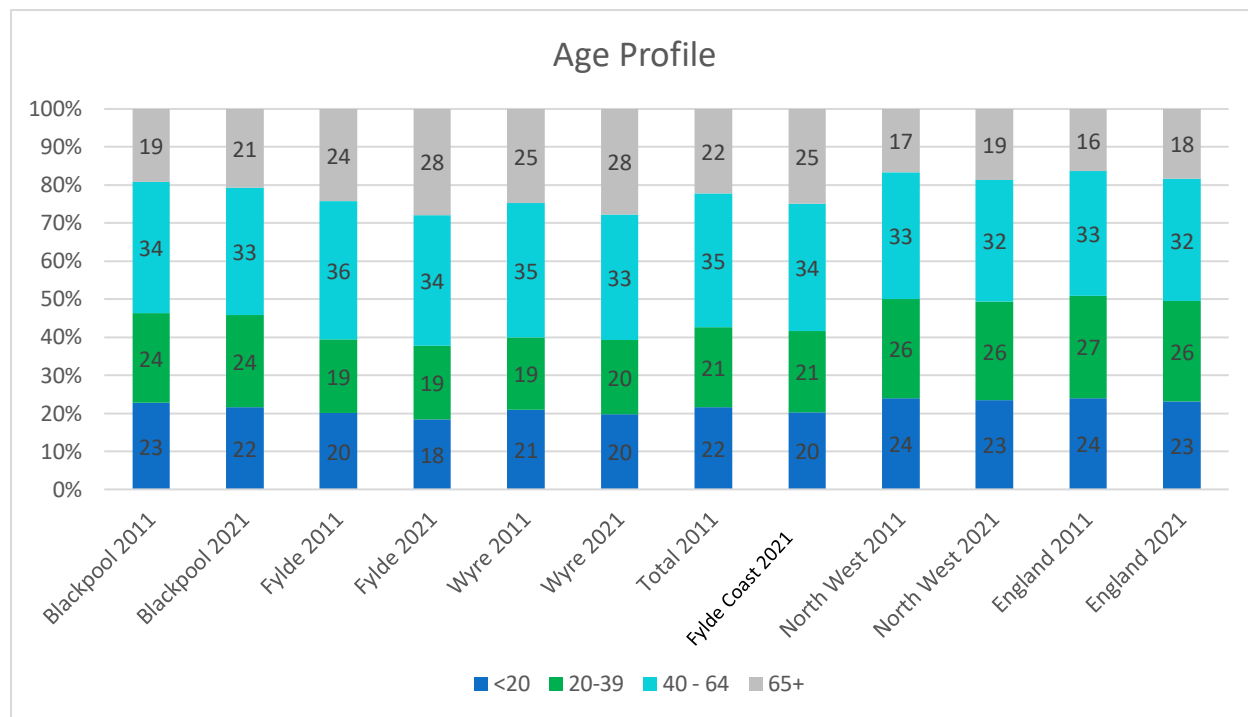
Population Composition

3.6 Census statistics allow for a more detailed analysis of the composition of the populations in each area, and in particular those between 16 and 64 years of age (the 'working population' as defined by the Census). The graph below provides an age profile, detailing the proportion of the population in each age category, compared with 2011 Census data for Blackpool, Fylde and Wyre. This shows the following:

- **Blackpool** – From 2011 to 2021 there has not been a large variance, the largest change being a 2% increase in the population aged 65+. Blackpool has a greater percentage of 65+ (21%) than both the North West (19%) and England (18%), as well as having a smaller percentage of the population aged <40 (46% compared to 49% for both the North West and England).
- **Fylde and Wyre** – Both areas saw an increase in their population, particularly in the age category 65+. They each have a much larger proportion of people in this age category (28% for both) compared to the North West (19%) and England (18%). In addition, the population <40 is much smaller than the regional and national averages (37% for Fylde and 40% for Wyre).

⁷ Census Data, 2021

Figure 7 - Age Profile Comparison 2011-2021, Fylde Coast



Source: Census 2011; Census 2021

3.7 As the chart above shows, residents under 20 and between 20 and 64 have become an increasingly smaller proportion of Blackpool, Fylde and Wyre’s populations, and this change is pacing ahead of the national average. For instance, the whole of the Fylde Coast has seen a 4% increase in population over 65 years between 2011 and 2021, compared to a 2% increase in the North West and England.

3.8 In addition, the Local Economy Baseline for Blackpool (2011), noted that Blackpool is an attractive location for retirees (i.e., those aged 65 plus) but was not attracting in-migrants of working age. This remains broadly true, although not in the case of Fylde and Wyre which have seen increases in working age population in recent years as shown in Table 10 below. However, proportions of retirees are larger in Fylde and Wyre than in Blackpool, suggesting even stronger issues with an ageing population in these locations than in Blackpool, a trend again noted in The Local Economy Baseline for Blackpool (2011).

Migration Patterns

Inflows and Outflows

- 3.9 The ONS Local Authority migration data for 2020 shows the inflows and outflows of people from Blackpool, Fylde, and Wyre.⁸ The table below shows the total number of migrants coming into and out of the three districts in year, and the proportion of which who are of working age.⁹
- 3.10 It should be noted that the data from the year ending June 2020 will capture the initial shock of the Covid-19 pandemic and the lockdown policies in place across the nation. However, as the majority of data for this year was realised between July 2019 and March 2020, it should not be overly affected by pandemic migration patterns.
- 3.11 Of the three authorities, only Blackpool saw a net loss in both population overall and people of working age. For example, in 2020 Blackpool saw 7,184 residents in total leaving the area while 6,638 moved in. Of those leaving, 5,297 (or 74.7%) were of working age, while of those arriving, 4,907 (or 73.9%) were of working. This represents a minor loss in both population groups and correlates with an overall decline in employment in Blackpool over the last decade (see Table 10 below).
- 3.12 Fylde, in contrast, experienced a net inflow of both the total population and the working age population in 2020. This represents an improvement since 2012, when the working age outflows slightly exceeded working age inflows, and this could be explained by an improvement in economic opportunity and a greater abundance of jobs in the Fylde area (again see Table 10 below).
- 3.13 Wyre also saw a net gain in both total and working age population, and its overall gain of 1,500 residents was the biggest gain of the three local authorities. As in the case of Fylde, the attraction of this area could be explained by ‘pull factors’ like jobs and economic opportunity as total employment has also grown.

⁸ This data series was initiated by ONS in 2012 and 2020 is the latest available year

⁹ ONS Local Authority migration, 2020

3.14 It should also be noted that the migration data given here represents the permanent movement in people, and it is distinct from patterns of commuting, i.e., the daily movement of people to and from employment, which are set out in Section 6.0.

Table 10 - Migration by District, 2012/2020

	Total #		15-64 yrs #		Working age proportion of total migration inflows and outflows %	
	Out	In	Out	In	Out	In
Blackpool 2020	7,184	6,638	5,297	4,907	73.7%	73.9%
Blackpool 2012	8,240	8,030	6,190	6,020	75.1%	75%
Fylde 2020	3,703	4,819	2,740	3,287	74%	68.2%
Fylde 2012	3,950	4,090	2,980	2,910	75.4%	71.1%
Wyre 2020	4,813	6,351	3,505	4,393	72.8%	69.2%
Wyre 2012	5,160	5,690	3,920	4,130	76%	73%

Source: ONS Internal migration for local authorities in England and Wales, year ending June 2012; 2020.

3.15 Further, the macroeconomic shocks of recent years have restricted the ability for many households to move, as can be seen in national trends where internal migration across England has declined in recent years¹⁰.

3.16 The proportion of inflows and outflows of the working age population has fallen across all three local authorities since 2012. This suggests that internal migration is increasingly being driven by over-65s as the UK population ages, and that the Fylde Coast retains appeal for both working age and non-working age sub-groups.

3.17 Unsurprisingly, migration between the three local authorities is strong, with 1,039 people moving between the three areas in 2020, and 55% of those migrating between areas being of working age. In absolute numbers, the amount of cross-migration did not vary substantially by area, with between 183 and 198 working age emigrants in each authority.

¹⁰ Local Area Migration Indicators UK, ONS, 2020

Migration Trends

- 3.18 Again, using ONS Local Authority migration data for 2020, Table 11 below shows the top four locations to and from which people have moved. For Blackpool, the highest proportion of outflow was to Fylde and Wyre respectively (both at 4.7%), followed by Scotland (3.42%), and Preston (3.23%). Wyre constituted the largest share of inflows to Blackpool at 7.28%, with Fylde following at 7.06%.
- 3.19 Interestingly, both Fylde and Wyre had both their highest share of outflows and its highest share of inflows to and from Blackpool: 7.38% and 9.97% for Fylde, and 6.76% and 8.78% for Wyre. This shows a strong level of cross-migration between the areas and highlights the economic interdependence of the Fylde Coast.
- 3.20 As noted above, a majority of movements were from working age people and so will, in part at least, reflect economic opportunities present in one local authority area but not in another.
- 3.21 Blackpool has strengths in its large retail and accommodation and hospitality sectors, requiring lower-skill labour, plus health and social care and transport and storage, which may require a mix of high and low skilled labour, while Fylde's strengths are in professional and scientific research, demanding workers with high qualifications. Wyre has strengths in manufacturing, construction and public administration and defence which will require staff at varying skills levels. In this way the three local authority areas are somewhat complementary, with their differing economic strengths. Further discussion on the industry sector strengths and projected trends going forward are discussed in later in this chapter.
- 3.22 Cross-migration might also be a function of house prices: the average price paid for a property in Blackpool is £151,000 as of September 2023, compared with £212,000 and £283,000 for Wyre and Fylde respectively.¹¹ Overall Blackpool is a more affordable place to live, which may be important for younger households, and those on lower incomes. Higher prices in Fylde and Wyre may conversely reflect attractive locations in terms of environment and quality of life, which are key considerations for higher income groups and as well as those at, or close to retirement age.

¹¹ OnTheMarket, 2023

- 3.23 In terms of other areas, Preston has strong interrelationships with Blackpool, Fylde and Wyre. However, in the case of Blackpool and Fylde, inflows exceed outflows, i.e., Blackpool and Fylde are attracting more people in from Preston than they are losing to the city. This is also true for South Ribble in the case of Fylde. This includes those who may be looking to retire in the coastal/rural communities of the Fylde Coast and those living in the Fylde Coast but commuting into Preston to work. Indeed, most movements are from working age people so the economic draws are important and include key Fylde Coast facilities such as BAE Warton and Westinghouse Springfields. Conversely in Wyre, migration outflows to Preston are stronger than inflows. This reflects, for the economically active working age population at least, strong economic interrelationships along the A6 Corridor, i.e., with towns like Catterall and Garstang feeding into the Preston economy.
- 3.24 Unsurprisingly, Wyre has the strongest relationship with Lancaster, in terms of migration with inflows exceeding outflows. This includes Lancaster residents looking for a higher quality of life and quality of housing in the Wyre rural communities close to Lancaster.

Table 11 - Migration Trends

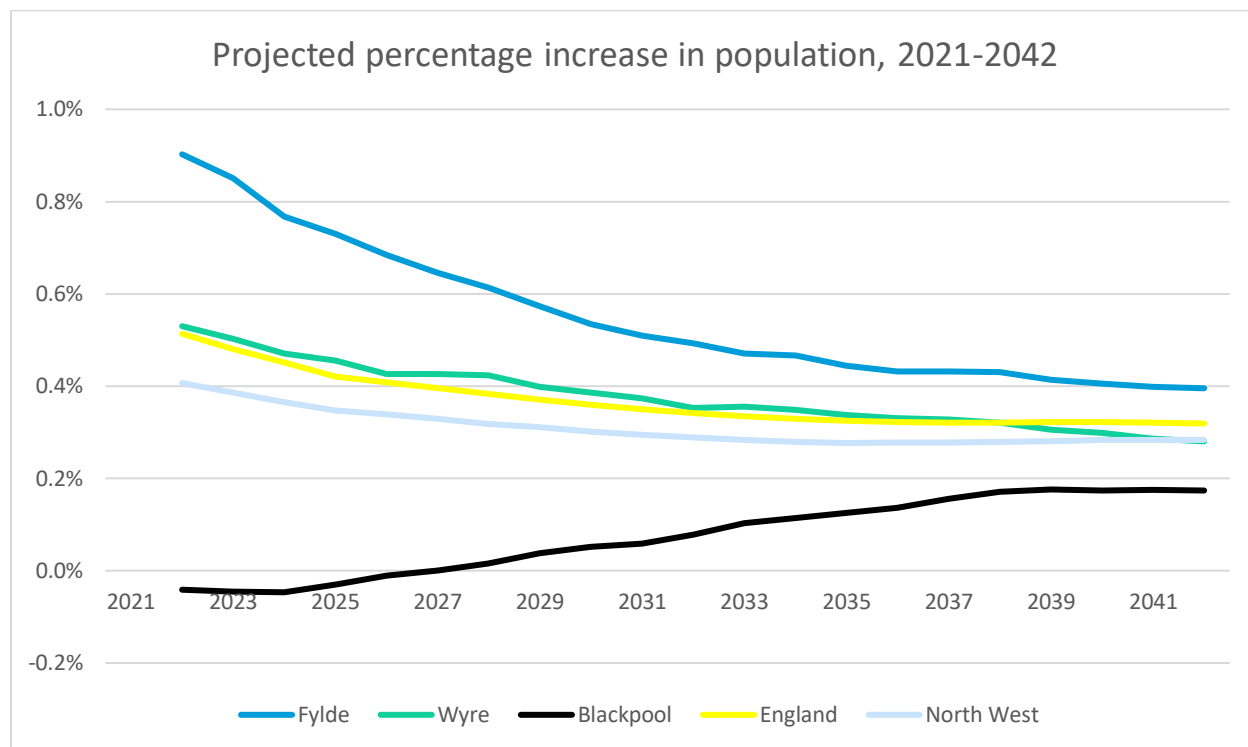
Rank	OUTFLOWS			INFLOWS		
	Count	Location	Percentage	Count	Location	Percentage
Blackpool						
1	99	Fylde	4.70%	100	Wyre	7.28%
2	99	Wyre	4.70%	97	Fylde	7.06%
3	72	Scotland	3.42%	63	Preston	4.59%
4	68	Preston	3.23%	54	Lancaster	3.93%
Fylde						
Rank	Count	Location	Percentage	Count	Location	Percentage
1	97	Blackpool	7.38%	99	Blackpool	9.97%
2	91	Wyre	6.92%	86	Preston	8.66%
3	76	Preston	5.78%	83	Wyre	8.36%
4	44	Lancaster	3.35%	62	South Ribble	6.24%
Wyre						
Rank	Count	Location	Percentage	Count	Location	Percentage
1	100	Blackpool	6.76%	99	Blackpool	8.78%
2	90	Preston	6.09%	92	Lancaster	8.16%
3	83	Fylde	5.61%	91	Fylde	8.07%
4	77	Lancaster	5.21%	87	Preston	7.72%

Source: ONS Local Authority Migration data

Population Projections

3.25 Population projections have implications for job growth and employment requirements going forward. The graph below shows the forecasted population growth as predicted by ONS up until 2042, using 2021 as the base year. These align with historic population changes between 2011 and 2021 as shown earlier.

Figure 8 - Total Population Projection for the Fylde Coast, 2021-2042



Source: ONS, 2021

3.26 This shows that Blackpool is expected to have smaller proportional increases than the averages for the North West and England. The modest population declines, noted in Blackpool since 2011 are expected to continue until 2025, reducing the population to a low of 139,000. Population growth returns post 2035 increasing the overall population to 141,000 by 2042. Overall, Blackpool’s population is expected to remain approximately the same in 2042 compared with a North West increase of c.11% and an England average of c.13%.

3.27 In contrast, projections for Fylde show the largest percentage growth of the three districts, aligning with historic increases since 2011, and above North West and England growth rates, a 13.1 % increase by 2042. The population is expected to rise to 92,170 by 2042. Wyre will see steady population change of 9.3 %, i.e., largely in line with the regional and national growth rate of 10.7 %, with its population reaching 122,350.

Population Projection by Age Group

3.28 Table 12 below breaks down population forecast into age categories. The table shows that the largest changes in population, for all three Local Authorities, are expected in the 65+ age category, aligning with the aging population in the North West and England. In the case of Blackpool and Wyre the working age population is forecasted to decrease. At Blackpool the anticipated decrease of c.11% in the number of people aged 40-64, is notable as these are normally the higher earning group of the working age population. Across all age groups, Fylde is predicted to experience the largest proportional increase at 13.1%, followed by Wyre at 9.3%, and then Blackpool at seeing no change in overall population. Over the same period, the North West region is expected to grow by 10.7%, which the over-65 group increasing by 36%.

Table 12 - Population Projections by Age and Local Authority 2042

Age	Blackpool				Fylde				Wyre			
	Bpool Pop 2021	Bpool Pop 2042	Bpool Change	Bpool % Change	Fylde Pop 2021	Fylde Pop 2042	Fylde Change	Fylde % Change	Wyre Pop 2021	Wyre Pop 2042	Wyre Change	Wyre % Change
<20	30,600	31,198	598	+2.0%	15,000	15,176	176	+1.2%	22,200	21,467	-733	-3.3%
20-39	34,000	32,412	-1,588	-4.7%	15,800	14,979	-821	-5.2%	21,900	21,503	-397	-1.8%
40-64	47,200	41,863	-5,337	-11.3%	28,000	28,105	105	+0.4%	37,100	35,541	-1,559	-4.2%
65+	29,300	35,840	6,540	+22.3%	22,700	36,207	13,507	+59.5%	31,100	43,836	12,736	+41.0%
Total	141,100	141,308	208	+0%	81,500	92,170	10,670	+13.1%	111,900	122,350	10,450	+9.3%

Source: ONS Population Projections, 2018; Census 2021

Working Age Population

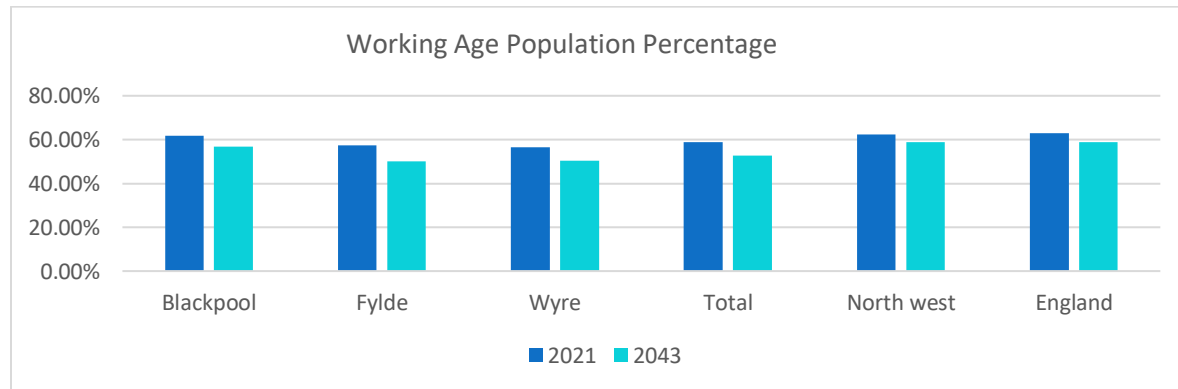
- 3.29 Working age is a prime indicator of the supply of labour and is classified by the National Census and Office for National Statistics as people between the ages of 16 and 64, despite the official retirement age as of 2023 being 66 years old. This is to maintain consistency across time series since the abolition of the default retirement age (65 years of age) in 2011.
- 3.30 Table 13 and Figure 9 below show the numbers and proportions of people that are of working age in 2011 and 2021, and the projected change by 2042. Between 2011 and 2021, all three local authority areas saw a decline in their working age populations ranging from 1% in Blackpool to 3% in Fylde. In the case of Blackpool, this reflects an ongoing decline in the working age population since at least the mid-1990s.
- 3.31 In line with population projections above, all areas are expected to see a further decrease in the future, which aligns with the expected increases in the population aged 65+. Currently, Blackpool has the same percentage of population of working age as the North West and is only one percent less than the average in England. In 2042, it is expected to be two percent less than both the regional and national averages. However, in Fylde and Wyre's case there is a larger decrease observed in the proportion of the population of working age, again this reflects trends since 2011 at least in which Fylde and Wyre have seen the largest proportionate reductions in working age population.
- 3.32 As can be seen, such reductions are a national trend, although the trend is stronger in Fylde and Wyre than elsewhere. Nationally, the trend reflects changing demographics, most notably the retirement of the 'baby boomer' generation, proportionally the largest UK generation. Locally, these factors are exacerbated by the attractiveness of the Fylde Coast to retirees and some inability to retain working age people although, as noted, the movement of people within and to/from the Fylde Coast is complex.

Table 13 - Working Age Population: Past, Present, and Future

Area	2011			2021			2042		
	All Ages (000s)	Ages 16-64 (000s)	% Working Age	All Ages (000s)	Ages 16-64 (000s)	% Working Age	All Ages (000s)	Ages 16-64 (000s)	% Working Age
Blackpool	142.1	89.3	63%	141.0	87.0	62%	141.6	80.5	57%
Fylde	76.2	45.4	60%	81.4	46.9	57%	92.5	46.4	50%
Wyre	107.7	63.7	59%	112.5	63.7	57%	122.7	61.7	50%
Total	325.9	198.4	61%	335.3	197.6	59%	356.8	188.6	53%
North West	7,056.0	4,531.7	64%	7,422.3	4,637.7	62%	7,912.6	4,666.0	59%
England	53,107.2	34,347.4	65%	56,536.4	35,600.3	63%	61,744.1	36,366.8	59%

Source: Census 2011; Census 2021; ONS population projections 2043

Figure 9 - Working Age Population Change, Fylde Coast



Source: Census 2021; ONS population projections 2043

DEMOGRAPHIC ASSESSMENT – CONCLUSIONS

3.33 The following conclusions are based on the data and analysis presented above.

Blackpool is expected to see a small fall in the working population, on par with the previous trends experienced since 2011

Fylde is experiencing a substantial rise in population, especially in those aged 65+, which is expected to continue into the future. The number of people of working age is projected to remain unchanged

Wyre's percentage of working age population has slowly declined since 2011 and this percentage, and the number of the population of working age, is forecast to decline by 2042

The rate of ageing across Blackpool and Wyre is on par with that across the North West and England

- Over the past 40 years to 2021, Blackpool's population has continued to decline from 149,000 to 141,100, albeit the decline is less in the last 20 years. Population growth is expected to increase from the mid-2030s and continue at a gradual rate up to 2042. Fylde and Wyre have seen steady past growth which is expected to continue to 2042.
- All three local authority areas saw increases in their 65+ population since 2011, this trend is forecast to continue with almost all population increase in the Fylde Coast being in the over 65 cohort. An ageing population is a national issue but will also reflect the attractiveness of the Fylde Coast to retirees. It will have a range of impacts including increased need for older person's housing options, considerations on how the elderly can be served by things like the location of shops and, reductions in the economically active population of the Fylde Coast and the overall local supply of labour, which will impact on economic growth.
- The reduction in the percentage of the working age population out of the total population affects the whole Fylde Coast although the working age population (both by number of workers and as a percentage of the whole population) is expected to fall across the Fylde Coast area by 2042.
- The higher earning age group of 40-64 is set to reduce by c.11% in Blackpool by 2043, and to a lesser degree in Wyre by c.4.2%.

- There is an active movement of people between the Fylde Coast authorities, although that movement is far less than it was in 2011. A majority of that movement is of those of working age so will likely be driven, at least in part, by economic considerations reflecting the differing employment opportunities of different parts of the Fylde Coast and the availability of suitable housing in the region.
- Preston has strong interrelationships with Blackpool, Fylde and Wyre although for Blackpool and Fylde it is a net exporter of labour to the Fylde Coast which will include working age population meeting local labour needs.

LABOUR MARKET PROFILE

Employment Rate

3.34 The employment rate is defined by Nomis as the percentage of the working age population in full-time employment, including both economically active and inactive residents. The most recent data available from the Annual Population Survey is summarised in Table 14 below. It shows that Fylde had the highest percentage of their working population in employment, with Wyre having the lowest.¹² This equated to roughly 58,300 people in Blackpool, 35,700 in Fylde and 42,900 in Wyre. Blackpool and Wyre have lower employment rates than the regional and national averages, with Fylde outperforming both the region and country for these indices.

Table 14 - Employment and Unemployment Rates, Fylde Coast, 2011-2022

	Blackpool	Fylde	Wyre	North West	England
Employment Rate, 2011	66.6%	83.2%	67.2%	68.6%	71.0%
Employment Rate, 2022	72.2%	78.9%	70.0%	73.5%	75.8%
Variance	+5.6%	-4.3%	+2.8%	+4.9%	+4.8%
Unemployment Rate, 2011	10.5%	4.6%	6.1%	8.0%	7.4%
Unemployment Rate, 2022	6.0%	3.5%	5.3%	4.1%	3.7%
Variance	-4.5%	-1.1%	-0.8%	-3.9%	-3.7%

Source: NOMIS Business Register and Employment Survey, 2022

¹² NOMIS Business Register and Employment Survey, 2022

3.35 The general trend of employment has been positive. Both Blackpool and Wyre saw increases in their employment rates from 2011 to 2022, and while Fylde experienced a small decline, it retained the highest rate of the three districts. These trends reflect an improvement of macroeconomic conditions as the country moved out of the 2008-2013 national recession, as demonstrated by similar shifts in the North West and England averages.

3.36 Correspondingly, unemployment shrunk across all areas. Blackpool experienced the largest drop, from 10.5% to 6.0%, but this 2022 level still exceeds averages in the North West and England, as was the case in 2011. Fylde experienced drops in both employment and unemployment rates, which may suggest that these movements were partially driven by working age residents retiring.

Table 15 - Employment vs Self-Employment, Fylde Coast, 2011-2022

	Blackpool	Fylde	Wyre	North West	England
% who are employees, 2011	58%	70.1%	51.7%	59.8%	60.3%
% who are employees, 2022	63.7%	63.8%	64.3%	65.4%	66.0%
Variance	+5.7%	-6.3%	+12.6%	+5.6%	+5.7%
% who are self-employed, 2011	7.9%	13.2%	14.4%	8.1%	9.2%
% who are self-employed, 2022	8.5%	15.2%	! ¹³	7.9%	9.3%
Variance	+0.6%	+2.0%	-	-0.2%	+0.1%

Source: NOMIS Business Register and Employment Survey, 2011 and 2022

3.37 The Business Register and Employment Survey (2022) provides further breakdown for those who consider themselves ‘employees’ and ‘self-employed’, stating: “The division between employees and self-employed is based on survey respondents’ own assessment of their employment status. The percentages show the number in each category as a percentage of all people aged 16-64. The sum of employees and self-employed will not equal the in employment figure due to the inclusion of those on government-supported training and employment programmes, and those doing unpaid family work in the “self-

¹³ Data for this input unavailable

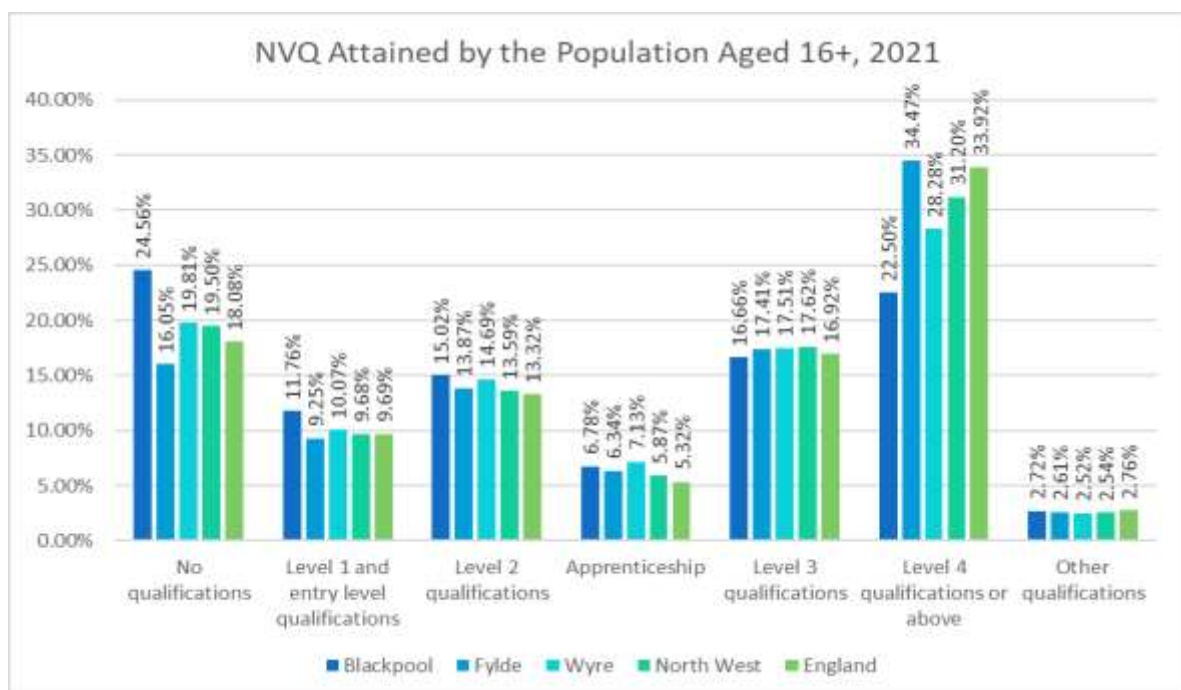
employment” category.”¹⁴.

3.38 Table 15 above shows the period 2011 to 2022 also saw a convergence of the percentage of the workforce who are employees to between 63% and 66% across geographies, a significant improvement over the period but marginally below regional and national averages. Rates of self-employment have held up well, bucking regional and national trends, which saw declines, although in Wyre there is a shift towards employed work.

Skills

3.39 Figure 10 below, using data from the 2021 Census, shows the National Vocational Qualifications (NVQ) level attained by the population aged 16+ of Blackpool, Fylde and Wyre, compared with levels attained in the North West and England. Individuals with NVQ4+ qualifications, equal to a degree level, make up the largest proportion in Fylde and Wyre, whilst representing the second largest proportion of people in Blackpool.

Figure 10 - National Vocational Qualifications Level, Fylde Coast, 2021



Source: Census Data 2021

¹⁴ Labour Market Profile – Definitions and Explanations, NOMIS, 2023

3.40 In this category, Blackpool (22.5%) and Wyre (28.3%) were behind the regional (31.2%) and national (33.9%) averages, but Fylde (34.5%) was above. Blackpool has the largest proportion (24.6%) having no qualifications which is considerably larger than regional (19.5%) and national (18.1%) averages suggesting that the Borough continues to have a significant issue with under qualified/low skilled residents. As the graph shows, the variation of each area’s population proportion in the other categories was much smaller.

Table 16 - Comparison of NVQ Levels, Fylde Coast, 2011-2021

Qualification Level		Blackpool	Fylde	Wyre	North West	England
No Qualifications	2011	31.3%	21.2%	25.9%	24.8%	22.5%
	2021	24.6%	16.1%	19.8%	19.5%	18.1%
	Change	-6.7%	-5.1%	-6.1%	-5.3%	-4.4%
Level 1	2011	15.5%	12.0%	13.4%	13.6%	13.9%
	2021	11.8%	9.3%	10.1%	9.7%	9.7%
	Change	-3.7%	-2.7%	-3.3%	-3.9%	-4.2%
Level 2	2011	17.1%	16.6%	16.6%	15.8%	15.2%
	2021	15.0%	13.9%	14.7%	13.6%	13.3%
	Change	-2.1%	-2.7%	-1.9%	-2.2%	-1.9%
Apprenticeship	2011	4.2%	4.2%	4.8%	3.9%	3.6%
	2021	6.8%	6.3%	7.1%	5.9%	5.3%
	Change	2.6%	2.1%	2.3%	2.0%	1.7%
Level 3	2011	11.6%	12.3%	12.1%	12.9%	12.4%
	2021	16.7%	17.4%	17.5%	17.6%	16.9%
	Change	5.1%	5.1%	5.4%	4.7%	4.5%
Level 4	2011	15.5%	29.8%	23.0%	24.4%	27.4%
	2021	22.5%	34.5%	28.3%	31.2%	33.9%
	Change	7.0%	4.7%	5.3%	6.8%	6.5%
Other ¹⁵	2011	4.7%	4.0%	4.2%	4.5%	5.7%
	2021	2.7%	2.6%	2.5%	2.5%	2.8%
	Change	-2.0%	-1.4%	-1.7%	-2.0%	-2.9%

Source: Census Data, 2011 and 2021

¹⁵ This covers NVQ Level 5-8 (postgraduate and doctoral levels)

3.41 Comparing 2021 data to the 2011 Census indicates that:

- There were fewer people with no qualifications across the Fylde Coast of c.5% in all three local authority areas. This reduction was in line with regional and national trends which also saw reductions in unqualified individuals
- Blackpool saw its share of population with lower grade Level 1 or Level 2 qualifications fall: the first from 15.5% to 11.8% and the second from 17.1% to 15.0%. The share with Level 3 or Level 4 qualifications both rose significantly with the proportion qualified to Level 4 gaining seven percentage points, above changes elsewhere in the Fylde Coast but in line with regional and national improvement over the same period.
- Fylde saw a similar trend, although it started from a much higher baseline. In 2011 Fylde had a higher proportion of individuals with Level 4 qualifications than the national average and has increased this proportion to 34.5%.
- Wyre too saw a drop in those with low levels of skill (10.1% with Level 1 and 14.7% with Level 2 respectively) while the proportion on Level 4 rose significantly to 28.3% (an increase of 5.3%).

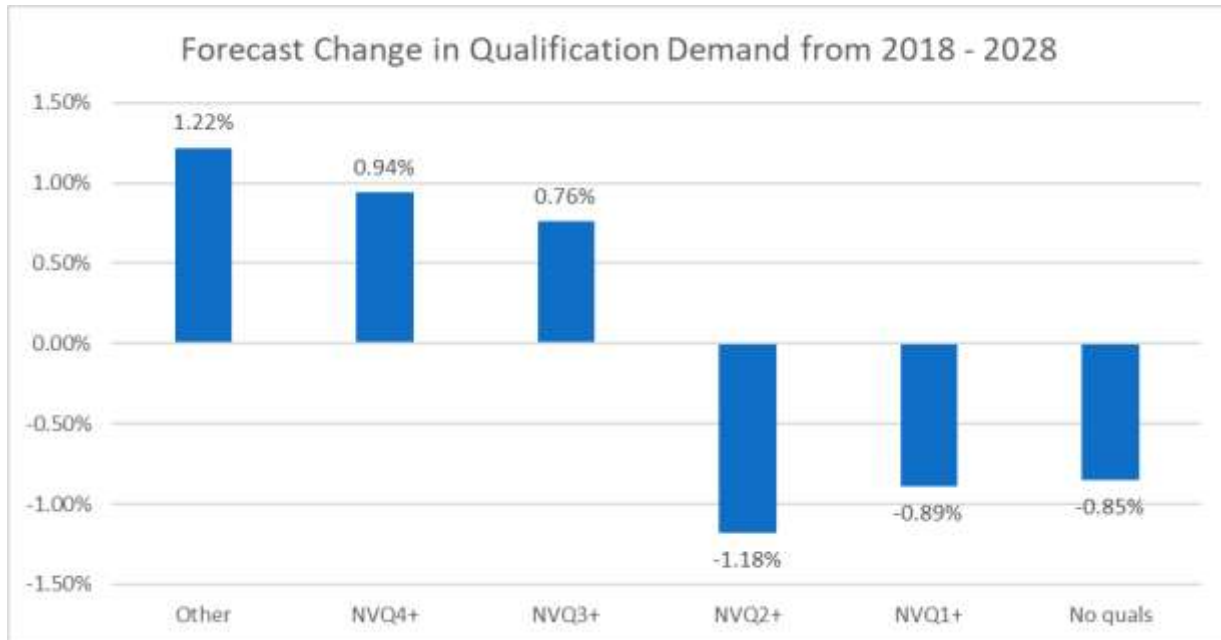
3.42 While Blackpool still has a significant proportion of its population with no qualifications and the proportions with higher qualifications remain below average, across the Fylde Coast, there has been a notable improvement in attainment levels since 2011. The improvement is largely in line with average gains across the North West and England, however.

Forecast Qualification Demand

3.43 Below is a graph showing the forecast change in qualification demand from 2018-2028 which predicts the anticipated change in qualification attainment across the time period.¹⁶ There is clearly an increased demand for higher level qualifications with NVQ3+ and higher across the study area, compared to lower-level qualifications. This rise in demand for high skill labour is roughly matched by the fall in demand for low skill labour, which suggests a continued shift towards a higher educated workforce to meet the skills needs of employers, something which is occurring based on recent trends noted above.

¹⁶ Oxford Economics Local Authority Databank Forecasts, 2018

Figure 11 - Forecast Change in NVQ Levels, Fylde Coast, 2018-2028



Source: Oxford Economics Local Authority Databank Forecasts, 2018

LABOUR MARKET PROFILE – CONCLUSIONS

3.44 The following conclusions regarding the districts’ labour market profile can be drawn from the above data:

Blackpool: The employment rate and skill levels have risen since 2011. Skill levels remain relatively lower than Fylde or Wyre.

Fylde: The employment rate has fallen slightly since 2011, while skill levels have improved.

Wyre: The employment rate and skills levels have both increased since 2011.

Demand for high skill labour is projected to increase further.

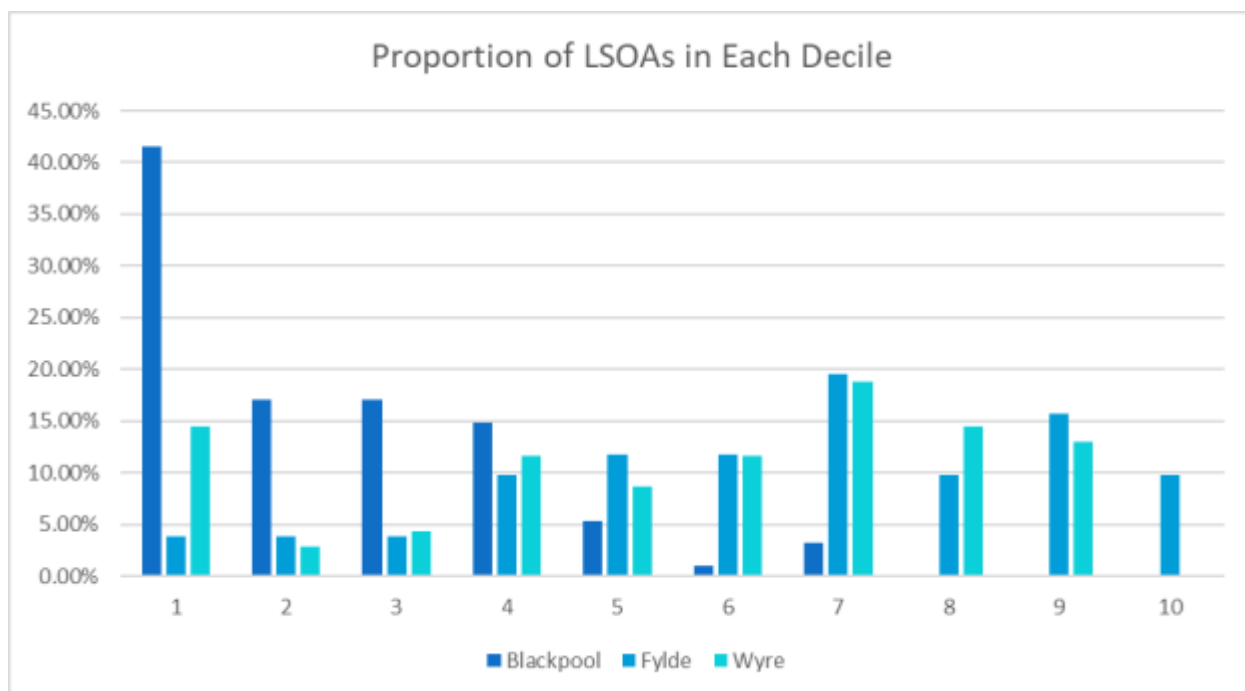
- Positive trends in employment and unemployment since 2011 accord with an easing of macroeconomic conditions as the UK recovered from recession, with more recent macro-economic crises, such as the Covid-19 Pandemic not visibly reducing employment rates to date
- There has been considerable improvement in skills levels reflecting national trends and changes to the skills needs of employers, in line with forecast demand for qualifications
- Correspondingly the demand for low skill labour has fallen, reflected in the sharp decline in the share of population with Level 2 or lower qualifications.
- The number of people employed has risen sharply since 2011 and is closing on regional and national averages, although unemployment remains a factor in Blackpool and Wyre, indicating there is action required to transform the local economy
- Blackpool's skill levels are broadly lower relative to Fylde and Wyre, as well as regional and national averages, in line with the historic reliance on low skill employment in the Borough, such as the accommodation and food sector. However, the substantial fall in the number of people with no qualifications indicates subsequent upskilling.
- A key issue in areas where skills levels are rising is the rate at which demand for those skills from employers respond – otherwise it may lead to people leaving for better prospects elsewhere.

DEPRIVATION INDEX

- 3.45 The national index of multiple deprivation (IMD) incorporates seven distinct domains of deprivation, which are: income; employment; health and disability; education and skills; crime; barriers to housing; and living environment. These are broad indicators that give a relative, rather than absolute, indication of socioeconomic hardship. The more deprived a local authority, the lower the employment and income levels in an area, reducing productivity and typically reducing the Gross Value Added (GVA) to the economy (see Section 3.98).
- 3.46 The 2019 IMD ranked Blackpool as the most deprived Local Authority in England out of 317 (from 10th in 2010). Fylde was ranked 198th (compared with 235th in 2010) and Wyre was ranked 147th (up from 185th in 2010). This demonstrates that deprivation levels in all three districts have worsened relative to the rest of the country over the last decade, despite improvements in areas such as skill levels.

3.47 Blackpool also had 8 out of the 10 most deprived Lower Layer Super Output Areas (LSOA) in England, (compared with 3 in 2010) and out of Blackpool’s 93 LSOAs, 41.5% are in the top 10% of the most deprived LSOAs nationally (up from 27%). The most deprived areas were Bloomfield and Claremont ranking second and third for the most deprived LSOAs in England.

Figure 12 - Proportion of LSOAs in Each Decile, Fylde Coast, 2019



Source: Ministry of Housing, Communities & Local Government, 2019

3.48 The graph above shows the proportion of LSOAs in each decile for the Local Authorities with 1 being the worst i.e., the most deprived. Fylde has its highest proportion of LSOAs in the 7th decile with 10/51, and its second highest proportion in the 9th decile 8/51. Wyre has its highest proportion of LOSAs in the 7th decile with 13/69 and its second highest in the 1st and 8th decile with 10/69. Both districts broadly align with their 2010 levels.

3.49 Blackpool suffers from a large segment of the population facing intense deprivation. Fylde and Wyre, in contrast, fare much better and continue to place in the middle-to-upper deciles for most LSOAs.

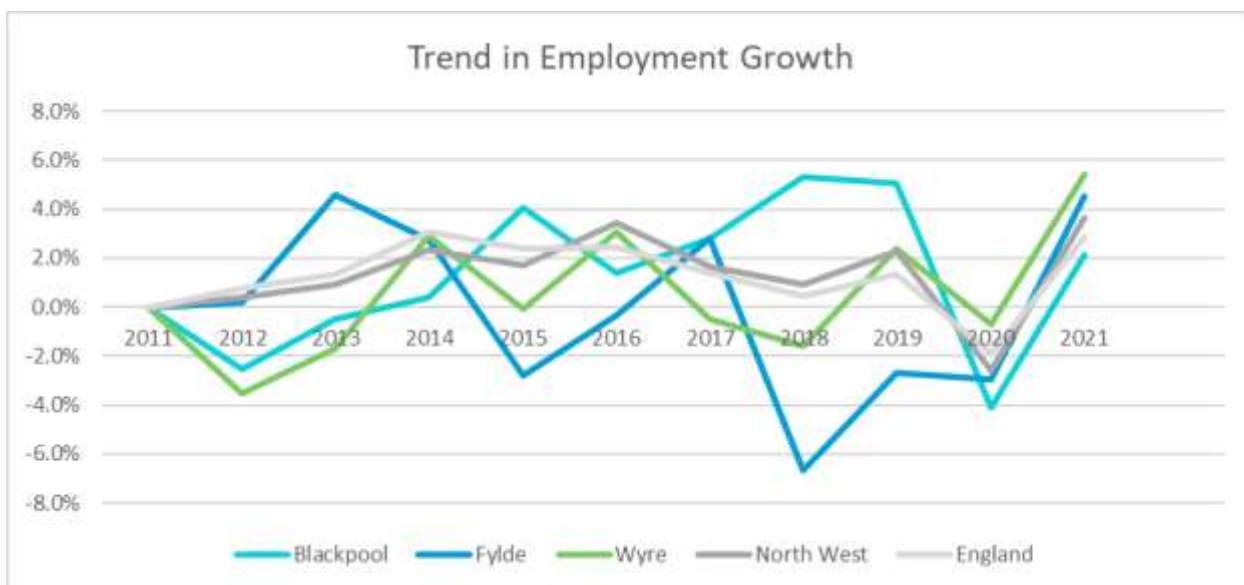
EMPLOYMENT

3.50 This section utilises the Business Register and Employment Survey (BRES) data which provides details on the number of jobs within differing industry sectors, using broad industry classification groups.

Employment Growth

3.51 Trends in employment growth have been assessed between 2011 and 2021 to provide insight on the general trajectory of employment across the Fylde Coast, compared to regional and national trends.

Figure 13 - Employment Growth for the Fylde Coast, 2011-2021



Source: BRES 2009-2015 and BRES 2015-2022

3.52 The regional and national trend in employment across the time series follows similar troughs and peaks, showing a harmonised pattern of employment growth where deviations for the three boroughs can be identified due to internal, rather than external, factors.

- Blackpool and Wyre both saw an initial downturn in employment from 2011, with Wyre recovering at a faster rate by 2013, and Blackpool falling behind until 2014, potentially indicating the delayed impact of the 2008-2013 recession on employment.
- Fylde, however, saw an initial increase in the numbers in employment from 2011 to 2013 (from c.39,800 to c.41,700 employees – an increase of c.2,000 over the two years), before slowing in 2014

- Between 2015-2019 Fylde's performance was noticeably worse than Blackpool and Wyre, particularly post-2017 where employment fell from 42,700 to 39,900 (-3%) between 2017 and 2018.
- Blackpool and Wyre followed similar patterns and performed similarly to regional and national averages, with Blackpool slightly above and Wyre slightly below.
- In the period 2019-2020 all three local authority areas showed a decline at the onset of the pandemic, although there was substantial improvement between 2020 and 2021 across all three authorities, aligning with national and regional economic recovery as restrictions eased and the furlough period ended¹⁷.
- However, Fylde achieved the greatest rate of recovery of all the areas from 2020-2021, increasing by 7.5 percentage points.

Employment by Industry

3.53 Table 17 below measures local economic activity by sector, as of 2021. Comparisons to the 2011 employee headcount per sector are included below, with the variance noted alongside. All figures are taken from census data.¹⁸

¹⁷ Coronavirus Job Retention Scheme Statistics, Gov.uk, 2021

¹⁸

https://www.nomisweb.co.uk/census/2011/QS605EW/view/1946157102?rows=c_indgepuk11&cols=rural_urban

Table 17 - Employment by Industry Sector as at 2011 vs 2021

Industry	Blackpool			Fylde			Wyre			North West, 2021	England, 2021
	Bpool 2011	Bpool 2021	Bpool Change	Fylde 2011	Fylde 2021	Fylde Change	Wyre 2011	Wyre 2021	Wyre Change		
A. Agriculture, forestry & fishing	73 (0.1%)	105 (0.2%)	+32	335 (1.0%)	335 (0.9%)	0	883 (2.0%)	902 (1.9%)	+19	0.7%	0.8%
B. Mining, quarrying & utilities	42 (0.1%)	53 (0.1%)	+11	22 (0.1%)	30 (0.1%)	+8	102 (0.2%)	124 (0.3%)	+22	0.1%	0.2%
C. Manufacturing	4,895 (8.0%)	4,004 (6.7%)	-891	4,300 (12.5%)	3,306 (9.3%)	-994	4,315 (9.7%)	3,643 (7.6%)	-672	8.1%	7.3%
D. Electricity, gas, steam and air conditioning supply	242 (0.4%)	350 (0.6%)	+108	109 (0.3%)	337 (0.9%)	+228	230 (0.5%)	380 (0.8%)	+150	0.6%	0.6%
E. Water supply; Sewerage, Waste management and Remediation activities	315 (0.5%)	286 (0.5%)	-29	159 (0.5%)	176 (0.5%)	+17	380 (0.9%)	281 (0.6%)	-99	1%	0.7%
F. Construction	4,434 (7.2%)	4,683 (7.9%)	+249	2,172 (6.3%)	2,605 (7.3%)	+433	4,313 (9.7%)	4,536 (9.5%)	+223	8%	8.7%
G. Wholesale and retail trade; repair of motor vehicles and motorcycles	9,967 (16.2%)	9,266 (15.6%)	-701	4,607 (13.3%)	4,696 (13.1%)	89	7,636 (17.1%)	6,751 (14.1%)	-885	16.1%	15%
H. Transport and Storage	2,929 (4.8%)	2,580 (4.3%)	-349	1,067 (3.1%)	1,106 (3.1%)	+39	1,987 (4.5%)	1,753 (3.7%)	-234	5.1%	5%
I. Accommodation & food services	7,438 (12.1%)	5,946 (10%)	-1,492	2,549 (7.4%)	2,207 (6.2%)	-342	3,119 (7.0%)	2,700 (5.6%)	-419	5.1%	4.9%
J. Information & Communication	1,266 (2.1%)	1,019 (1.7%)	-247	1,271 (3.7%)	1,095 (3.1%)	-176	1,135 (2.5%)	1,030 (2.2%)	-105	3.5%	4.7%

Fylde Coast Economic Needs Update & Employment Land Review – Final Report, August 2024

Industry	Blackpool			Fylde			Wyre			North West, 2021	England, 2021
	Bpool 2011	Bpool 2021	Bpool Change	Fylde 2011	Fylde 2021	Fylde Change	Wyre 2011	Wyre 2021	Wyre Change		
K. Financial & Insurance	1,706 (2.8%)	1,077 (1.8%)	-629	1,500 (4.3%)	1,061 (3.0%)	-439	1,252 (2.8%)	974 (2.0%)	-278	3.0%	3.8%
L. Real estate activities	634 (1.0%)	642 (1.1%)	+8	520 (1.5%)	579 (1.6%)	+59	497 (1.1%)	576 (1.2%)	+79	1.5%	1.6%
M. Professional, scientific & technical	1,950 (3.2%)	1,984 (3.3%)	+34	2,022 (5.9%)	2,131 (6.0%)	+109	2,286 (5.1%)	2,401 (5.0%)	-115	5.8%	6.7%
N. Administrative & support services	2,796 (4.6%)	2,787 (4.7%)	-9	1,294 (3.7%)	1,555 (4.4%)	+261	1,626 (3.6%)	1,888 (3.9%)	+262	5.1%	5.3%
O. Public administration & defence	5,750 (9.4%)	5,545 (9.3%)	-205	3,364 (9.7%)	3,682 (10.3%)	+318	5,252 (11.8%)	5,090 (10.6%)	-162	6.1%	5.8%
P. Education	4,089 (6.7%)	3,920 (6.6%)	-169	3,238 (9.4%)	3,404 (9.5%)	+166	4,802 (10.8%)	4,777 (10.0%)	-25	9.7%	9.9%
Q. Human health and social work activities	9,171 (14.9%)	12,140 (20.5%)	+2,969	4,354 (12.6%)	5,686 (15.9%)	+1,332	6,495 (14.6%)	7,848 (16.4%)	+1,353	16.2%	14.6%
R. Other¹⁹	3,697 (6.0%)	2,972 (5.0%)	-725	1,625 (4.7%)	1,725 (4.8%)	+100	2,248 (5.0%)	2,184 (4.6%)	-64	4.2%	4.6%
Total (Count #)	61,419 (100%)	59,358 (100%)	-2,061	34,510 (100%)	39,700 (100%)	+5,190	44,558 (100%)	47,838 (100%)	+3,280	100%	100%

Source: Census 2011 and Census 2021

¹⁹ 'Other' includes arts, entertainment and recreation; activities of households as employers; undifferentiated goods and services producing activities of households for own use; and other service activities.

3.54 The following are the largest sectors by proportion for each local authority area, as of 2021:

- **Blackpool:** Health (20.5%); Wholesale and Retail Trade (15.6%); and Accommodation and Food Services (10%) - these sectors were also identified as the three dominant industries in 2011²⁰
- **Fylde:** Health (15.9%); Wholesale and Retail Trade (13.1%); and Public Administration & Defence (10.3%).
- **Wyre:** Health (16.4%); Wholesale and Retail Trade (14.1%); and Public Administration & Defence (10.6%).

3.55 The following are the sectors that had the most growth for each local authority area between 2011 and 2021:

- **Blackpool:** Health (+2,969); Construction (+249); and Electricity, Gas, Steam and Air Conditioning (+108).
- **Fylde:** Health (+1,332); Construction (+433); and Public Administration and Defence (+318).
- **Wyre:** Health (+1,353); Administrative & Support Services (+262); and Construction (+223).

3.56 Overall, employment in Fylde and Wyre has nominally increased by c.5,000 and c.3,000 workers respectively across industries. Conversely, total employment in Blackpool has decreased by c.2,000 employees across all sectors. Blackpool's Local Plan Spatial Vision Goal 1²¹ was adopted in 2016 to encourage sustainable regeneration and diversification of businesses to create better paid jobs and a wider variety of employment. Employment figures by industry since 2011 indicate that sector growth has remained somewhat static, with the exception of Human Health and the Construction industry, showing limited diversification in recent years.

²⁰ Blackpool Local Economy Baseline Study, SQW, 2011

²¹ Blackpool Local Plan, Part 1 Core Strategy: 2012 - 2027

- 3.57 However, the indications are that the forward economic strategy for Blackpool will set in place changes to a more diverse economy with higher paid jobs (for example, the IT sector) and continued growth in occupational sectors 1-3 (see Tables 18 and 24 below). These factors suggest that Blackpool may become increasingly less reliant on traditional sectors such as Accommodation and Food in the future.
- 3.58 The health sector has seen the strongest growth by employment across all regions of the Fylde Coast with a total increase of some 5,700 workers, with 53% of these being in Blackpool, 23.5% in Fylde and 23.5% in Wyre. **In the case of Blackpool**, the Teaching Hospitals NHS Foundation Trust has increased its employee numbers from c.5,700 in 2015 to over 6,500 in 2021. It is also a function of ageing populations, as discussed previously, which are increasing the need for long term personal care amongst populations and care staff in residential institutions. Again, this is a national trend affecting both public and private healthcare institutions.
- 3.59 Other points of note include:
- The slight rise in **construction** in part reflects a general return to growth after a sharp decline following the 2008 crash, with total growth across the Fylde Coast close to 1,000 jobs. This is part of a national trend in construction industry growth driven by a growing housing market over the last decade which has seen extensive new housebuilding even in weaker housing markets like Blackpool who have been delivering against the standard methodology requirement of 144 dwellings per annum.
 - Clearly, **the public sector** is a large employer in all three districts accounting for 36-37 percent of employment in each area when public administration, health and education are combined. This compares to averages of 32 percent and 30 percent for the North West and England respectively. This is unsurprising given the range of major public sector employers on the Fylde Coast, including the DWP with some 3,000 employees, National Savings and Investments, and HM Land Registry. Since 2011, at least almost all public sector growth has been in Human health and social work activities, as noted above, with only modest fluctuation in other sectors, apart from Wyre which saw a 1.2 percent reduction in Public administration and defence employment over 2011-2021, which is likely linked to DWP vacating Norcross. Thus, a growing health sector aside, public sector employment has been relatively stable locally, even during the post-2010 period of national austerity. Moving forward, while

- the DWP is consolidating its staff into the new King Street office, Blackpool, no large scale public sector organisation, including education providers, is reporting plans to significantly increase or decrease local employment suggesting this overall stability will continue.
- **Manufacturing** sector employment is proportionally strongest in Fylde, at 9.3 %, followed by Wyre and then Blackpool. In all three locations, manufacturing employment has declined since 2011, with the strongest declines being in Fylde and Wyre. The decline in **manufacturing** jobs follows longstanding regional and national trends as the sector moves away from low-value labour-intensive manufacturing and a movement towards automation and white-collar work.²² It does not automatically imply a loss of businesses or a failure to attract new ones, something discussed below. It is also worth noting that local manufacturing sector employment remains well above regional and national averages in Fylde and Wyre although it is less dominant in Blackpool's economy.
 - **Transport and Storage** has only a modest role in the economy of the Fylde Coast, with proportionate employment levels falling below the wider averages of around 5 percent. The sector has also seen zero or negative growth since 2011. This is unsurprising as the M55 Corridor is considered a secondary market for logistics activities compared to the M6 and M62 cross country routes
 - **Private office sectors, comprising sectors J-N in the above table** account for 12.6 % of employment in Blackpool, 18.1% of employment in Fylde and 14.3% in Wyre. Of the three local authority areas only Fylde's proportional private office sector employment was comparable to the North West average of 18.9% or the English average of 22.1 %, although the latter will be skewed by above average office sector employment in major cities. This will reflect the presence of multiple large office sector employers in Lytham. Local office sectors have seen negligible or negative growth since 2011, including in the Information and Communication sector, suggesting a limited local market even excluding national shocks to office sectors such as the Covid-19 Pandemic. This aligns with observations by SQW in 2011 that saw no private sector job growth in Blackpool between 2005 and 2008²³.

²² The Implications for Employment of the Shift to High-Value Manufacturing, 2013

²³ Section 3.34 - Blackpool Local Economy Baseline Study, SQW, 2011

- Tourism activities will mostly fall into **Accommodation and food services** which will include hotel, guest house and self-catering accommodation along with restaurant and café operations. Unsurprisingly this is strongest in Blackpool, at 10 % of local employment in 2021, largely double regional/national averages of 5 %, followed by Fylde at 6.2 % and Wyre at 5.6 %. In all three local authority areas, the proportions employed have declined since 2011
- Despite job losses, all three districts have larger proportions of workers employed in the **Accommodation & food services** industry compared to the regional and national averages, showing that the sector remains strong along the Fylde coast. In Blackpool, the district's high-quality large-scale tourist attractions and traditional appeal as a domestic tourist destination contributed £1.4bn in output in 2021, while tourism in Blackpool accounted for almost 40% of all visits to Lancashire County in the same year.²⁴
- The tourism sector also provides an important employment boost to the wider local economy through its reliance on wholesalers and business services for day-to-day operations, and through the increased spending generated by tourists coming to visit the area. Assuming an employment multiplier of 1.2 arising from these 'indirect' effects (to remain consistent with the previous Local Economy Baseline for Blackpool), then the Accommodation & Food sector would be supporting an additional 1,189 full-time jobs.
- Employment in **Wholesale and retail trade** is close to regional/national averages in Blackpool and slightly lower in Fylde and Wyre. Since 2011 the sector has lost employment, most notably in Wyre. This will reflect the national trends which are impacting high street trading including the growth of online shopping and the impact of the Covid-19 Pandemic, and resulting lockdowns, from which the retail sector is still recovering.

²⁴ <https://www.visitblackpool.com/latest-news/blackpool-s-post-pandemic-tourism-figures/#:~:text=The%20report%2C%20which%20evaluates%20the,in%20excess%20of%2020%2C000%20jobs>

Forecast Change in Employment by Industry

- 3.60 As part of the Employment Land Review, Cambridge Econometrics was employed to provide forecast data for each area spanning from 1981-2042. The commission forecasts employment by industry and occupation, as well as anticipated changes in GVA by industry. An assessment of the reliability of the data provided, compared against realised data for 1981-2020, is attached as Appendix 2 to this report. Please note that ONS and Cambridge Econometrics use distinct data measurement methodologies which explains why there may be differences in employment and GVA between the two.
- 3.61 Table 18 below compares expected employment by industry for each of the three boroughs in 2022 against what the levels are projected to be in 2042. Employment growth is shown in green, modest losses below 5% amber and larger losses above 5% are coloured red.

Table 18 - Employment by Industry 2022 vs 2042 Comparison

Industry	Blackpool				Fylde				Wyre			
	Bpool 2022	Bpool 2042	Bpool Change	Bpool % Change	Fylde 2022	Fylde 2042	Fylde Change	Fylde % Change	Wyre 2022	Wyre 2042	Wyre Change	Wyre %Change
A: Agriculture, forestry and fishing	294	308	14	4.6%	550	563	13	2.3%	540	552	12	2.2%
B: Mining and quarrying	-	-	-	-	-	-	-	-	-	-	-	-
C: Manufacturing	3,848	3,430	-418	-10.9%	8,985	6,354	-2,631	-29.3%	3,711	3,282	-429	-11.6%
D: Electricity, gas, steam and air conditioning supply	59	55	-4.2	-7.1%	34	33	-1	-2.9%	482	460	-22	-4.6%
E: Water supply; sewerage, waste management	119	117	-1.4	-1.2%	158	156	-2	-1.1%	201	198	-3	-1.6%
F: Construction	3,332	3,522	190	5.7%	3,497	4,027	531	15.2%	3,832	4,303	471	12.3%
G: Wholesale and retail trade; repair of motor vehicles	8,902	9,249	347	3.9%	5,017	5,186	169	3.4%	6,128	6,575	447	7.3%
H: Transportation and storage	2,935	3,085	150	5.1%	1,459	1,624	165	11.3%	1,458	1,535	77	5.3%
I: Accommodation and food services activities	7,910	8,389	478	6.0%	4,556	5,344	788	17.3%	4,158	4,491	334	8.0%

Fylde Coast Economic Needs Update & Employment Land Review – Final Report, August 2024

Industry	Blackpool				Fylde				Wyre			
	Bpool 2022	Bpool 2042	Bpool Change	Bpool % Change	Fylde 2022	Fylde 2042	Fylde Change	Fylde % Change	Wyre 2022	Wyre 2042	Wyre Change	Wyre %Change
J: Information and communication	1,041	1,463	423	40.6%	1,273	1,710	437	34.3%	829	1,141	313	37.7%
K: Financial and insurance activities	1,112	1,085	-27	-2.4%	1,035	1,009	-26	-2.4%	283	277	-6	-2.0%
L: Real estate activities	882	937	55	6.2%	623	662	39	6.2%	501	584	83	16.5%
M: Professional, scientific and technical activities	2,600	2,731	131	5.1%	6,012	6,484	472	7.9%	2,303	2,524	221	9.6%
N: Administrative and support service activities	3,363	3,620	257	7.6%	2,420	2,605	185	7.6%	1,348	1,500	152	11.3%
O: Public administration and defence; social security	8,440	8,795	355	4.2%	1,323	1,378	56	4.2%	920	931	11	1.2%
P: Education	5,157	5,514	357	6.9%	2,967	3,563	597	20.1%	3,754	4,161	408	10.9%
Q: Human health and social work activities	17,639	19,137	1,498	8.5%	4,588	5,440	852	18.6%	6,097	7,226	1,128	18.5%
R: Arts, entertainment and recreation	3,477	3,686	209	6.0%	1,229	1,436	207	16.9%	1,565	1,851	286	18.3%

Industry	Blackpool				Fylde				Wyre			
	Bpool 2022	Bpool 2042	Bpool Change	Bpool % Change	Fylde 2022	Fylde 2042	Fylde Change	Fylde % Change	Wyre 2022	Wyre 2042	Wyre Change	Wyre %Change
S: Other service activities	1,345	1,325	-20	-1.5%	1,160	1,118	-42	-3.6%	885	863	-22	-2.5%
Total	72,454	76,447	3,993	5.5%	46,885	48,693	1,808	3.9%	38,993	42,453	3,461	8.9%

Source: Cambridge Econometrics Forecasting, 2023

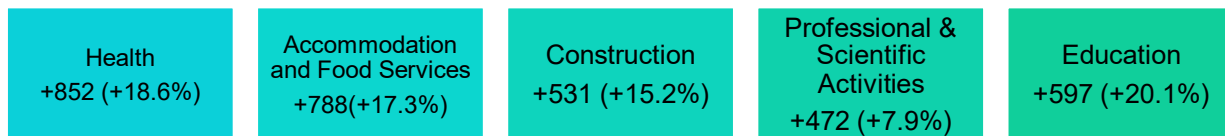
3.62 Between 2022 and 2042, job gains across all districts are expected to exceed job losses, indicated by the overall growth in employment for each borough (Blackpool: +3,993; Fylde: +1,808; and Wyre: +3,461). There is also clearly some common ground between the three districts: the Accommodation and Food Services sector is projected to increase across all areas, as is Construction. Further, the primary and secondary sectors²⁵ (Industries B to E) are predicted to see a decline in employment in the Fylde Coast. This is to be expected as the economy continues to move towards automated processing and is a continuation of the historic decline in these industries noted previously.

- **Blackpool:** The five biggest growth sectors by nominal jobs created are:



No sectors are projected to experience significant job losses, apart from the Manufacturing (-419) sector.

- **Fylde:** The largest growth sectors here include:



Forecast increase in these areas align mostly with the ageing population expected in Fylde, putting increased pressure on demand for these industries. The biggest job losses are expected in the Manufacturing industry with a loss of 2,631 jobs, a reduction of 29.3% from the estimated 2022 level (8,985 in 2022 versus 6,354 in 2042).

²⁵ Areas of the economy utilising either the collection/processing of Earth’s natural materials, and processing and manufacturing these goods

- **Wyre** is expected to have the highest overall percentage growth in employment (+8.9%), with job growth mainly projected across:

Health +1,128 (+18.5%)	Construction +471 (+12.3%)	Accommodation and Food Services +334(+8.0%)	Wholesale Trade +447 (+7.3%)	Education +408 (+10.9%)
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The manufacturing sector is the only industry expected to see significant decline across the period with a loss of 429 jobs, equating to a 11.6% reduction since 2022.

- 3.63 Following on from the analysis on historic trends in employment by sector above, further commentary is provided on core industries and how they are expected to fare in the long term.

Human Health and Social Work Activities

- 3.64 Across all three districts, the Human Health and Social Work Activities sector is predicted to continue to grow between 2022 and 2042, with a total expected increase across the Fylde Coast of 3,479 jobs (a 12.3% increase from 2022 levels). As a result, this sector's Cambridge Econometrics projection is highlighted below for specific analysis. This is expected to primarily be in the 'Residential and Social Activities' sub-sector, which is forecast to see a 35.07% increase in employment between 2022 and 2042 (as shown in Table 19 below). This further substantiates that the upward trends in health are a factor of the current and forecasted rising age of the population, increasing demand for health services and full-time care arrangements.

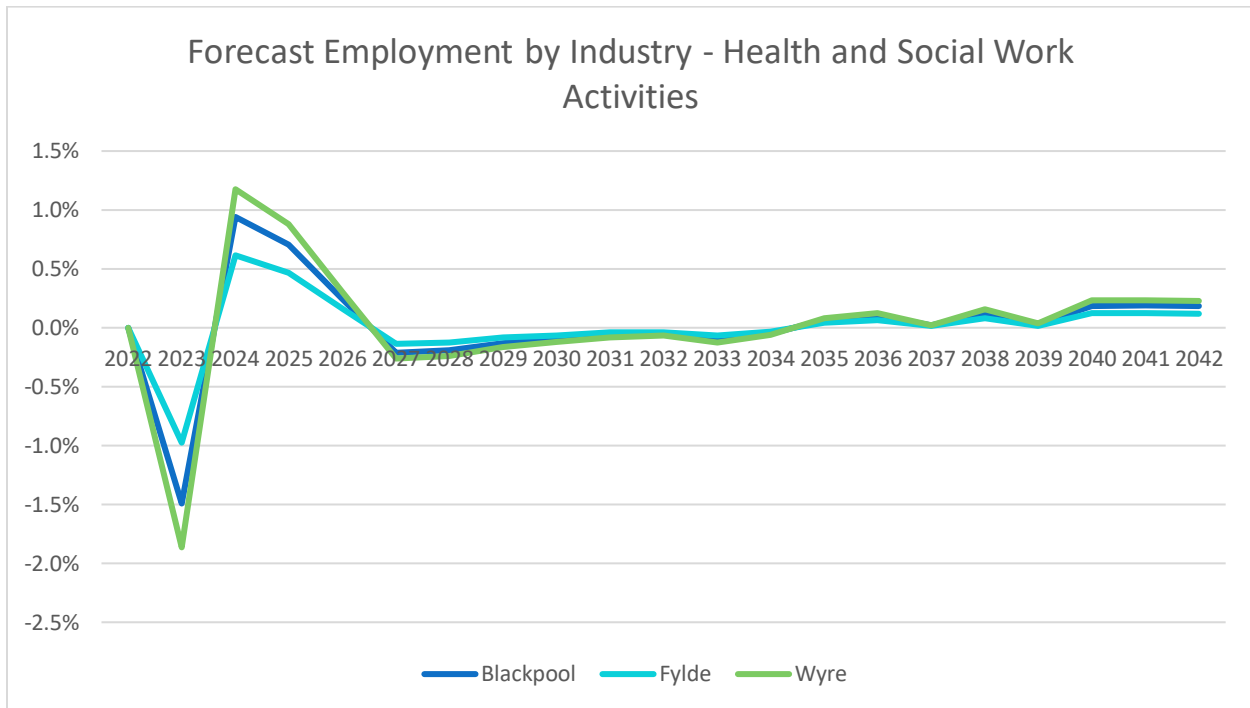
Table 19 - Breakdown of the Health and Social Work Activity Sector Forecast

	2022	2042	Nominal Change	% Change
Health				
Blackpool	12,594	12,642	48	0.38%
Fylde	2,184	2,190	6	0.26%
Wyre	3,830	3,848	18	0.47%
Total	18,608	18,679	71	0.38%
Residential and Social Activities				
Blackpool	5,045	6,496	1,451	28.76%
Fylde	2,404	3,251	846	35.19%
Wyre	2,267	3,378	1,110	48.98%
Total	9,716	13,124	3,407	35.07%
Industry Total				
Blackpool	17,639	19,137	1,498	8.50%
Fylde	4,588	5,440	852	18.56%
Wyre	6,097	7,226	1,129	18.51%
Total	28,324	31,803	3,479	12.38%

Source: Cambridge Econometrics Forecasting, 2023

3.65 The rate of growth of the Health and Social Work Activities sector between 2022 and 2042 is shown in Figure 14 below and indicates an initial period of continued accelerated growth from 2023 until 2025 across all three districts, before reducing through to 2027 and continuing on a steady upwards trajectory into the long-term.

Figure 14 - Forecast Employment Trends by Industry: Health Sector, Fylde Coast



Source: Cambridge Econometrics Forecasting, 2023

Construction

3.66 Interestingly, the rise in **construction** employment between 2011 and 2021 is expected to persist in the long-term which may reflect increased demand for housing development, and wider property maintenance. This continued upward shift in employment in the industry (+11.2% or +1,192 employees in total) accords with projected overall population growth mentioned previously, increasing housing demand. Fylde is expected to see the highest growth in employment in the construction sector at 15.2% (or +531, and Blackpool is expected to see the lowest at 5.7% (+190). These factors respond to household formation as well as population growth.

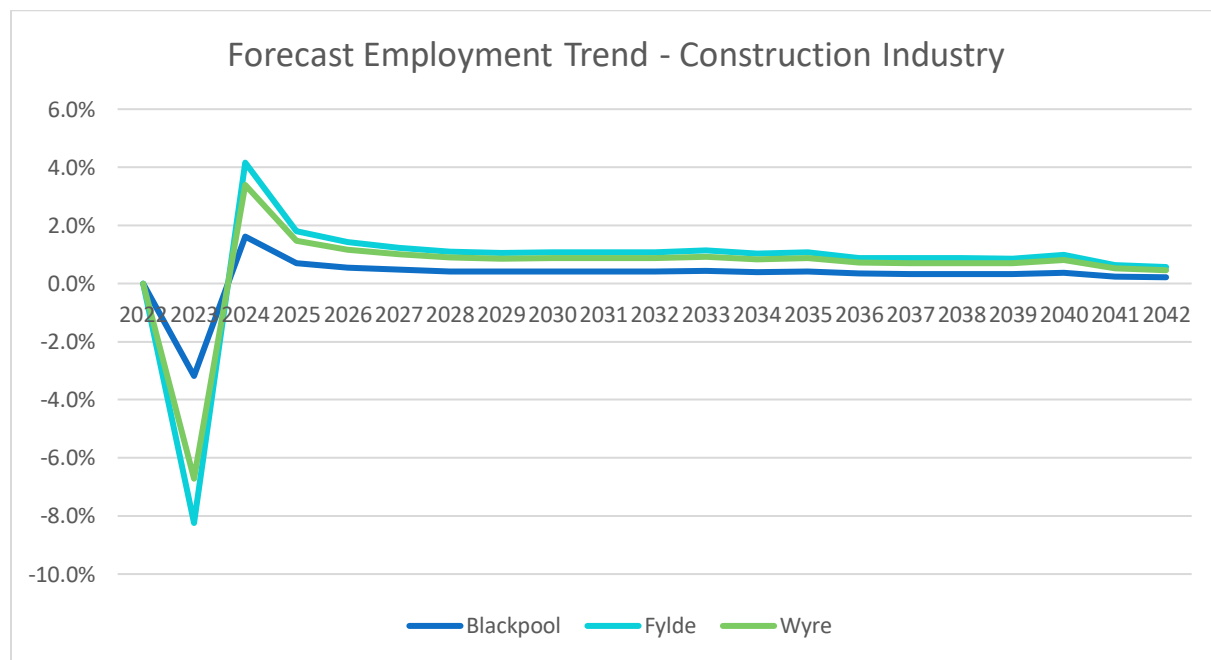
Table 20 - Forecast Employment Change: Construction 2022-2042

	2022	2042	Nominal Change	% Change
Blackpool	3,332	3,522	+190	+5.7%
Fylde	3,497	4,027	+531	+15.2%
Wyre	3,832	4,303	+471	+12.3%
Total	10,661	11,852	+1,192	+11.2%

Source: Cambridge Econometrics Forecasting, 2023

3.67 Figure 15 below shows that the initial increase in construction employment is anticipated to happen between 2023 and 2024 (an average increase of 3.06% across the Fylde Coast). Growth is then expected to slow but to remain positive for all districts, with Blackpool experiencing the slowest growth in the industry.

Figure 15 - Forecast Employment Trends by Industry: Construction Sector, Fylde Coast



Source: Cambridge Econometrics Forecasting, 2023

Public Sector Employment

3.68 As discussed previously, there is a heavy reliance across the Fylde Coast on public sector employment, covering Health, Education, and Public Administrative Services. In 2021, 36-37% of employment for each district fell into this category. Looking at future forecasts, this dominance of the workforce is expected to remain steady, with negligible change in the proportion of the workforce employed by this sector. This is reflective of market assessment and consultation with stakeholders which indicated that no large public sector employer was planning on significantly increasing or decreasing their employment levels.

Table 21 - Proportion of Fylde Coast Forecasted Employment in the Public Sector

Public Sector as % of Total	2022	2042	Change
Blackpool	36.1%	35.3%	-0.9%
Fylde	13.8%	14.7%	0.8%
Wyre	21.8%	21.1%	-0.7%
Total	26.0%	25.7%	-0.3%

Source: Cambridge Econometrics Forecasting, 2023

Manufacturing

3.69 The manufacturing industry is anticipated to see the highest decline across the Fylde Coast, suffering major losses in employment, especially within Fylde (a loss of 2,159 employees between 2023 and 2042 – a c.25% reduction). This is consistent with the trends over the past 10 years and reflects the long-standing national movement in the economy away from lower-skilled manufacturing jobs towards automation and white-collar work.

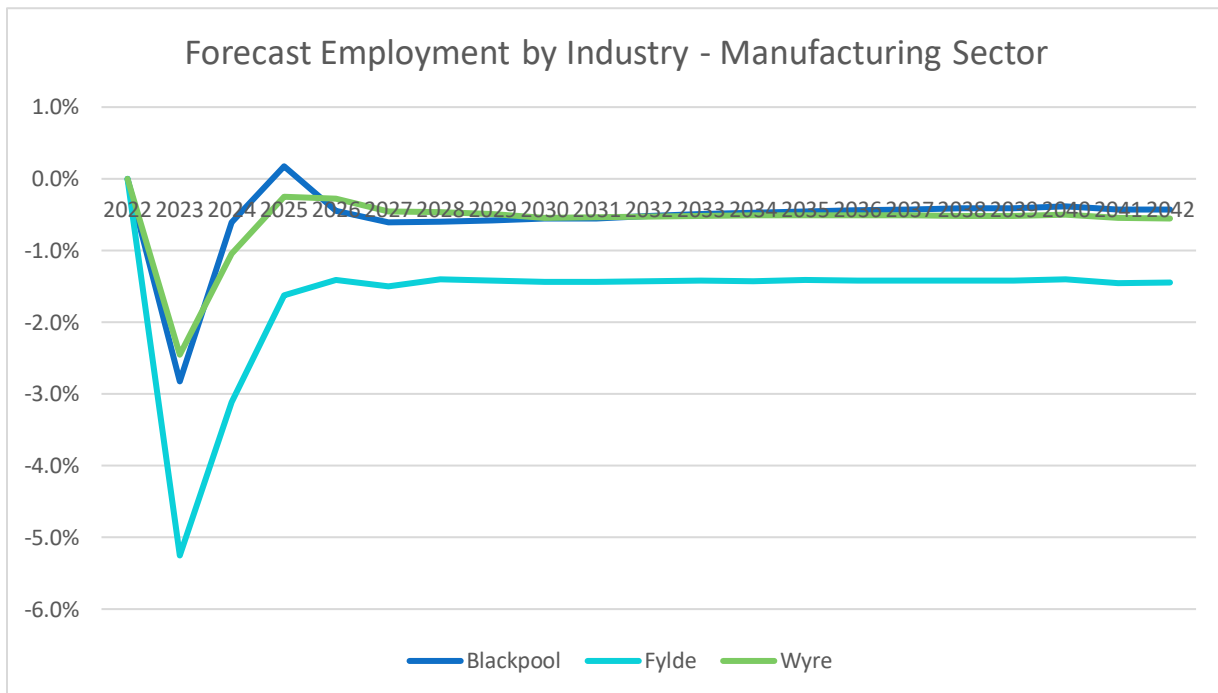
Table 22 - Forecast Employment Change: Manufacturing Sector, 2023-2042

	2022	2042	Nominal Change	% Change
Blackpool	3,848	3,430	-419	-10.9%
Fylde	8,985	6,354	-2,631	-29.3%
Wyre	3,711	3,282	-429	-11.6%
Total	16,544	13,065	-3,478	-21.0%

Source: Cambridge Econometrics Forecasting, 2023

3.70 Employment in this sector is expected to sharply decline, with Fylde experiencing a 5.3% in year decline in 2023, with Wyre and Blackpool experiencing a smaller drop of 2.5% and 2.8% respectively. Blackpool is expected to see a brief period of positive growth in 2025 where employment is expected to increase from 3,717 in 2024 to 3,723 (+6.5), however this positive growth is nominal and is not reflective of any significant trends. In the medium and long term, growth is expected to be negative for all districts.

Figure 16 - Forecast Employment Trends by Industry: Manufacturing Sector, Fylde Coast



Source: Cambridge Econometrics Forecasting, 2023

Accommodation and Food Service

3.71 As previously mentioned, the Tourism industry falls within the Accommodation and Food Services Sector which has seen an increase in employment in this sector between 2011 and 2021. This is projected to increase in the medium and long term, especially in Fylde where it is forecasted to grow by 25.2% between 2022 and 2042. In total, the Fylde Coast is anticipated to see a 13.8% overall increase (+2,287) in employment.

Table 23 - Forecast Employment Growth: Accommodation and Food Services

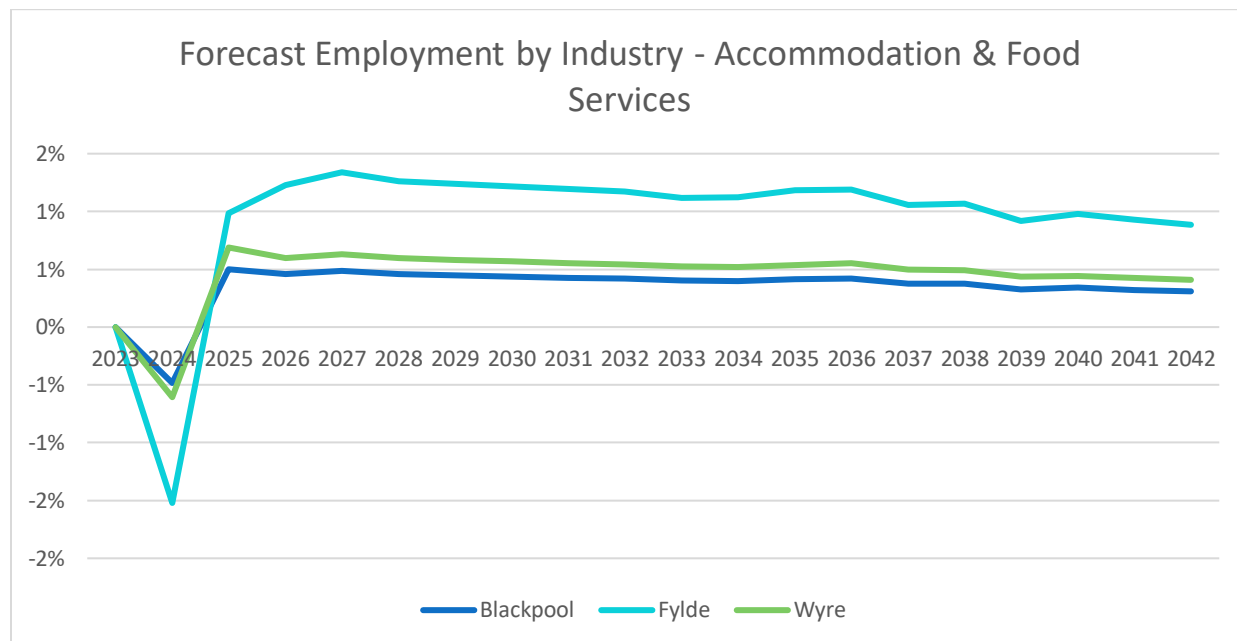
	2022	2042	Nominal Change	% Change
Blackpool	7,910	8,389	+669	+8.5%
Fylde	4,556	5,344	+1,147	+25.2%
Wyre	4,158	4,491	+470	+11.3%
Total	16,624	18,224	+2,287	+13.8%

Source: Cambridge Econometrics Forecasting, 2023

3.72 The tourism sector also provides an important employment boost to the wider local economy. Applying the same employment multiplier of 1.2 arising from these ‘indirect’ effects (as in the previous Local Economy Baseline for Blackpool), then the Accommodation & Food sector is expected to support an additional 3,645 full-time jobs in 2042.

3.73 From 2025 onwards growth is forecasted, particularly in Fylde.

Figure 17 – Forecast Employment Trends by Industry: Accommodation & Food Services, Fylde Coast



Source: Cambridge Econometrics Forecasting, 2023

Summary

3.74 Trends in employment by sector identified between 2011 and 2021 are forecast to continue into the medium and long term, with the greatest changes being the significant increase in Health sector employment, more specifically in Residential and Social Work, and the continued substantial decline in the Manufacturing sector, especially in Fylde.

Employment by Occupation

3.75 Table 24 below shows the split of employment by occupation in Blackpool, Fylde, and Wyre from January 2011 – December 2022 according to BRES.²⁶²⁷ Residents in Professional occupations account for the highest proportion of the workforce for all areas. Blackpool does stand out for having a much lower proportion (14.8%) of people working in this segment compared to the other geographies, whose values range from 22.9% - 26.6%. However, this represents a c.5% growth since 2011, demonstrating an increasing

²⁶ ONS Annual Population Survey, Jan-Dec 2022

²⁷ The values represented by (!) are not available as the group sample size is zero or would disclose details on a specific business.

number of high-quality jobs in Blackpool, in line with Local Plan objectives.

- **Blackpool:** Administrative and secretarial occupations account for the second largest proportion of employment in Blackpool (13.9%), followed by elementary occupations and associate professional occupations, both at 12.6%. These are typically lower value jobs and are more commonly found here than both the regional and national averages. Category 1 (8.7%) and Category 2 (14.8%) occupation levels remain significantly lower than regional and national averages. The proportion of managers and directors has declined since 2011. It is not clear why this has occurred although it may be linked to reductions in employment in some private office sectors, as noted above, where higher level management staff are likely to be focused. A similar trend is not noted in Fylde and Wyre, in spite of reductions in private sector office employment. Skilled trades occupations; Process, plant and machine operatives and Elementary occupations also reduced.
- **Fylde & Wyre:** In contrast Fylde (13.2%) and Wyre (18%) have significantly higher proportions of managers, directors and senior officials compared to the regional (9.9%) and national (10.7%) averages, and this gap has grown since 2011. Both districts have higher proportions of associate professional occupations than the national and regional averages. The proportion of workers employed in sales and customer service occupations, process, plant and machine operatives and elementary occupations in Fylde and Wyre are much lower than the national and regional averages, suggesting that more people are employed in higher value occupations

Table 24 - Employment by Occupation, BRES, 2011 vs 2022

Occupation	Blackpool			Fylde			Wyre			North West, 2022	England, 2022
	Bpool 2011	Bpool 2022	Bpool Change	Fylde 2011	Fylde 2022	Fylde Change	Wyre 2011	Wyre 2022	Wyre Change		
1. Managers, directors and senior officials	6,832 (11%)	5,300 (8.7%)	-1,532	4,349 (12.6%)	5,100 (13.2%)	+751	5,209 (10.7%)	8,200 (18%)	+2,991	9.9%	10.7%
2. Professional occupations	6,330 (10%)	9,000 (14.8%)	+2,670	7,168 (20.8%)	10,300 (26.6%)	+3,132	7,397 (15.2%)	10,300 (22.9%)	+2,903	24.7%	26.4%
3. Associate professional occupations	5,546 (9%)	7,700 (12.6%)	+2,154	4,330 (12.5%)	7,100 (18.2%)	+2,270	5,120 (10.5%)	7,300 (16%)	+2,180	13.9%	14.8%
4. Administrative and secretarial occupations	8,351 (13.6%)	8,500 (13.9%)	+149	4,324 (12.5%)	5,500 (14.3%)	+1,176	6,186 (14%)	5,300 (11.5%)	-886	10.3%	10.1%
5. Skilled trades occupations	7,184 (11.7%)	5,000 (8.2%)	-2,184	3,580 (10.4%)	2,300 (5.8%)	-1,280	6,703 (13.8%)	4,600 (10.1%)	-2,103	8.1%	8.6%
6. Caring, leisure and other service occupations	7,537 (12.2%)	7,400 (12%)	-137	3,279 (9.5%)	4,000 (10.2%)	+721	5,137 (10.6%)	4,300 (9.4%)	-837	8.7%	7.9%
7. Sales and customer service occupations	6,200 (10.1%)	6,200 (10.1%)	0	2,459 (7.1%)	2,500 (6.4%)	+41	3,917 (8%)	2,100 (4.6%)	-1,817	7.5%	6.2%
8. Process, plant and machine operatives	4,848 (7.9%)	4,300 (6.7%)	-548	1,832 (5.3%)	!	!	3,456 (7.1%)	1,600 (3.4%)	-1,856	6.5%	5.5%
9. Elementary occupations	8,591 (14%)	7,700 (12.6%)	-891	3,189 (9.2%)	1,500 (4%)	-1,689	4,803 (9.9%)	2,000 (4.4%)	-2,803	9.8%	9.3%
Total (Count #)	61,419 (100%)	61,200 (100%)		34,510 (100%)	38,800 (100%)		48,558 (100%)	45,500 (100%)		100%	100%

Source: Census 2011 and Census 2021

- Since 2011, there has been a shift across all local authority areas towards typically higher-skilled labour, especially in Wyre which has seen a substantial increase in the high value occupations and a decrease in lower skill employment. This will reflect, in part at least, reductions in lower skilled manufacturing work in favour of more technical jobs. Also, likely reductions in retail and accommodation and food employment, noted above, sectors which tend to employ lower skilled staff. Conversely, sectors which require more professional staff, such as health and social care have grown since 2011, or at least maintained their position locally.

3.76 The shift towards higher value occupations across the Fylde Coast demonstrates the importance of upskilling the local labour force as lower skilled job opportunities are in decline and aligns with the shift in the increasing number of people attaining NVQ 3 and 4 level qualifications, with decreases in the number of individuals with no qualifications or lower level NVQ levels, as related earlier.

Forecast Employment by Occupation

- 3.77 Based on the Cambridge Econometrics forecasts, employment trends by occupation will see several significant changes over the next two decades, as shown in Table 25 below.
- 3.78 For **Blackpool**, Corporate managers and directors will grow by 47% between 2022 to 2042. Conversely, Administrative occupations are expected to experience a decline of about 20% and secretarial and related occupations are projected to fall by 80%". Caring personal service occupations meanwhile are likely to rise by 27%, as is expected based on the forecast increase in health sector employment. Other professions such as science, teaching, and health are also expected to witness moderate upward trends.
- 3.79 In **Fylde**, Corporate managers and directors, Teaching and educational professionals and Health professionals are all expected to show robust growth over the next 20 years – with Caring personal service occupations predicted to rise considerably – likely due to increased demand for care services in the region as indicated in the forecast employment by industry for the Residential and care sector. Additionally, Secretarial and related occupations will experience a substantial decline of 76%".

3.80 In **Wyre**, notable growth is expected in occupations such as Teaching and educational professionals, Science, research, engineering and technology professionals, and Caring personal service occupations, which see percentage increases in employment ranging from 33% to 50%. Conversely, Secretarial and related occupations experience a substantial decline of approximately 74% in employment, indicating a reduced demand for such roles.

Table 25 - Forecast Employment by Occupation, 2022-2042

Employment by occupation	Blackpool			Fylde			Wyre		
	Bpool 2022	Bpool 2042	Bpool Change	Fylde 2022	Fylde 2042	Fylde Change	Wyre 2022	Wyre 2042	Wyre Change
Corporate managers and directors	3,959	5,810	47%	3,413	4,627	36%	2,486	3,710	49%
Other Managers and proprietors	3,908	3,610	-8%	2,597	2,520	-3%	2,205	2,088	-5%
Science, research, engineering and technology professionals	1,767	2,478	40%	3,378	3,807	13%	1,159	1,741	50%
Health professionals	4,831	4,752	-2%	1,427	1,546	8%	1,725	1,861	8%
Teaching and educational professionals	2,092	3,063	46%	1,206	1,818	51%	1,356	1,996	47%
Business, media and public service professionals	2,734	3,070	12%	2,287	2,493	9%	1,388	1,622	17%
Science, engineering and technology associate professionals	642.9	748.4	16%	825.5	987.9	20%	453.3	550.4	21%
Health and social care associate professionals	1,121	1,503	34%	356.3	507	42%	423.8	599	41%
Protective service occupations	2,160	2,372	10%	593.2	692.1	17%	475.7	558.7	17%
Culture, media and sports occupations	1,081	1261.5	17%	908.2	1,053	16%	674.3	813	21%
Business and public service associate professionals	3,366	4,294	28%	2,670	3,012	13%	1,694	2,187	29%
Administrative occupations	7,261	5,836	-20%	3,974	3,063	-23%	2,998	2,413	-20%
Secretarial and related occupations	1,581	315.3	-80%	804.9	193.2	-76%	682.9	179.3	-74%
Skilled agricultural trades	603.8	625.5	4%	620.7	708.7	14%	653.1	720.6	10%
Skilled metal, electrical and electronic trades	1,882	2,002	6%	2,499	2,031	-19%	1,603	1,657	3%
Skilled construction and building trades	1,735	1,797	4%	1,828	1,922	5%	1,811	1,980	9%
Textiles, printing, and other skilled trades	1,537	1,180	-23%	1,072	865.5	-19%	989.9	772.4	-22%
Caring personal service occupations	8,405	10,687	27%	2,828	3,861	37%	3,508	4,656	33%
Leisure, travel and related personal service occupations	1,949	1,934	-1%	1,087	1,166	7%	1,027	1,056	3%
Sales occupations	5,701	5,302	-7%	3,312	2,999	-9%	3,396	3,231	-5%
Customer service occupations	1,129	1,692	50%	654.9	959.5	47%	518.9	787.8	52%
Process plant and machine operatives	1,945	1,427	-27%	2,026	1,325	-35%	1,484	1,103	-26%
Transport and mobile machine drivers and operatives	2,764	2,419	-12%	1,567	1,436	-8%	1,699	1,561	-8%
Elementary trades, and related occupations	1,130	1,177	4%	731.8	737.4	1%	724.9	724.3	0%
Elementary administration and service occupations	7,171	7,093	-1%	4,221	4,363	3%	3,860	3,887	1%

Source: Cambridge Econometrics, 2021

3.81 Since 2011, the trend is towards higher value occupations requiring more extensive skill sets and shift away from low skill labour. Local level upskilling, as discussed previously, appears to have been successful across the Fylde Coast but there is still a need for lower skilled labour to support growth in areas such as health care, food and leisure.

Full to Part Time Working Rates

3.82 Table 26 below gives detailed information about the number of full-time (FT) and part-time (PT) workers employed in the three districts, while the next page displays a breakdown for different industries.

- Fylde has a much higher number of people employed full-time compared to the other two areas. This is expected as both Blackpool and Wyre have substantial hospitality and care employment sectors where part-time working is a feature, while Fylde’s higher wages (discussed below) incentivise greater participation.
- None of the areas had large variation in working patterns since 2011. Fylde, Wyre and the North West all had slight decreases in full-time working while Blackpool and England had slight increases; however, these changes were limited to between one and three percent and therefore do not have substantial implications.
- There is no available data published from the Census on double-jobbing across the Fylde Coast, where single individuals take on two or more means of employment.

Table 26 - Full-time VS Part-time working

	Blackpool		Fylde		Wyre		North West		England	
	Bpool FT vs PT		Fylde FT vs PT		Wyre FT vs PT		NW FT vs PT		England FT vs PT	
2022	62%	38%	74%	26%	64%	36%	69%	31%	70%	30%
2011	61%	39%	76%	24%	67%	33%	70%	30%	68%	32%

Source: ONS Business Register and Employment Survey, 2022

3.83 Table 27 below shows that, unsurprisingly, sectors such as Accommodation; Health; and Retail had a tendency towards part-time work, while Manufacturing; Professional and Scientific; and Finance favoured full-time work.

Table 27 - Full Time vs Part Time Working By Industry, Fylde Coast, 2022

Industry	Blackpool				Fylde				Wyre			
	Bpool Full-time		Bpool Part-time		Fylde Full-time		Fylde Part-time		Wyre Full-time		Wyre Part-time	
	Bpool No	Bpool Ind %	Bpool No	Bpool Ind %	Fylde No	Fylde Ind %	Fylde No	Fylde Ind %	Wyre No	Wyre Ind %	Wyre No	Wyre Ind %
Agriculture, forestry & fishing	0	0.0	0	0.0	175	0.6	100	1.0	250	1.2	150	1.2
Mining, quarrying & utilities	150	0.4	15	0.1	175	0.6	25	0.2	600	2.9	100	0.8
Manufacturing	3,500	8.8	200	0.8	8,000	27.6	450	4.5	3,000	14.3	300	2.5
Construction	1,500	3.8	300	1.2	2,000	6.9	500	5.0	2,500	11.9	450	3.8
Motor trades	600	1.5	200	0.8	450	1.6	50	0.5	500	2.4	150	1.2
Wholesale	1,000	2.5	175	0.7	500	1.7	75	0.8	1,000	4.8	175	1.5
Retail	2,250	5.6	3,500	14.0	1,500	5.2	1,750	17.5	1,500	7.1	2,250	18.8
Transport & storage (inc postal)	1,750	4.4	350	1.4	600	2.1	100	1.0	700	3.3	150	1.2
Accommodation & food services	3,500	8.8	4,500	18.0	1,750	6.0	2,500	25.0	1,500	7.1	2,500	20.8
Information & communication	700	1.8	175	0.7	800	2.8	150	1.5	500	2.4	100	0.8
Financial & insurance	800	2.0	175	0.7	900	3.1	125	1.2	150	0.7	50	0.4
Property	600	1.5	175	0.7	300	1.0	150	1.5	300	1.4	125	1.0
Professional, scientific & technical	1,500	3.8	350	1.4	5,000	17.2	500	5.0	1,500	7.1	350	2.9
Business administration & support services	1,750	4.4	1,000	4.0	1,250	4.3	600	6.0	600	2.9	300	2.5
Public administration & defence	6,000	15.0	2,500	10.0	1,000	3.4	300	3.0	600	2.9	250	2.1
Education	2,500	6.2	2,000	8.0	1,000	3.4	1,000	10.0	1,750	8.3	1,500	12.5
Health	10,000	25.0	7,000	28.0	2,500	8.6	1,500	15.0	3,000	14.3	2,250	18.8
Arts, entertainment, recreation & other services	1,750	4.4	2,250	9.0	600	2.1	400	4.0	800	3.8	700	5.8
All	39,850		24,865		28,500		10,275		20,750		11,850	

Source: ONS Business Register and Employment Survey, 2022

Distance Travelled to Work and Homeworking

3.84 The proportion of people travelling long distances to work and working from home affects both local economic conditions and the demand for employment space. Table 28 below sets out the 2021 Census data for Blackpool, Fylde, and Wyre.

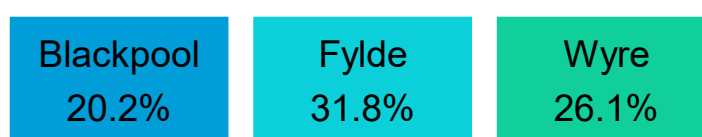
Table 28 - Distanced Travelled to Work, Fylde Coast, 2011 vs 2021

Distance Travelled	Blackpool		Fylde		Wyre	
	Bpool 2011	Bpool 2021	Fylde 2011	Fylde 2021	Wyre 2011	Wyre 2021
Less than 10km	41,591	31,450	19,089	12,732	25,384	17,755
10km to less than 30km	5,821	4,159	6,707	5,199	10,360	7,918
30km and over	2,851	1,864	2,248	1,637	3,065	1,834
Works mainly from home	6,173	12,014	4,055	11,361	5,406	12,479
Not in employment or works mainly offshore, in no fixed place or outside the UK	4,983	9,874	2,411	4,786	4,343	7,849

Source: Census 2011 and Census 2021

3.85 This shows strong retention in the three authorities base on local working (less than 10km), with few residents travelling over 30km to their place of work. Another subsection are peripatetic workers, referring to those who usually visit their clients or employees to work, such as care workers or nannies, and these will fall into the last section of workers with no fixed place.

3.86 The general trend across all three districts has been towards fewer commutes, increased working from home, and a higher number of people working without a fixed business location. The 2021 Census data further analyses the percentage of people mainly working from home. However, this census was conducted during the COVID-19 pandemic, and therefore the number of people working from home may be skewed above its typical value. The views of stakeholders, as discussed in Sections 4.0 and 5.0 are that, for office sectors at least, homeworking or at least hybrid working is now a permanent feature of the working environment. Thus, while homeworking rates may now be somewhat reduced on these 2021 figures (below), they will remain significant.



3.87 National trends show that hybrid and home working was more common amongst higher

earners. When looking at the average earnings for the three local authorities, this correlation is further demonstrated (see page 28).²⁸ Blackpool has the lowest average earnings, as well as the lowest proportion of homeworkers, Wyre the second highest earnings with the second highest proportion of homeworkers, and Fylde with the highest in both categories.

Employment - Conclusions

Blackpool: The biggest employment growth sectors include Health, Accommodation and Information Technology.

Fylde: The biggest employment growth sectors include Health, Accommodation and Construction.

Wyre: The biggest employment growth sectors include Health, Construction and Accommodation.

High value occupations are expected to grow across all three local authorities.

- Blackpool has outperformed the regional and national averages of employment growth since 2015, while Fylde has underperformed (albeit from a higher baseline). Wyre has generally aligned with the average.
- There is projected growth across high-value, medium-value and low-value sectors in all three districts, and this is likely to reflect the broad range of skill mix in their respective labour markets going forward.
- The public sector accounts for approximately 36-37% of total employment, exceeding regional and national averages. Most of the growth in the public sector over the last decade has been concentrated in health and social services, a trend that is expected to continue.
- The main occupation categories that have experienced growth since 2011 – Professional Occupations and Associate Professional Occupations – are projected to continue growing between now and 2042 as more high value jobs are created and the level of skills attainment continues to increase. The shift towards higher value occupations across the Fylde Coast demonstrates the importance of continued upskilling of the local labour force as lower skilled job opportunities decline.

²⁸ 'Hybrid Work Was More Common Among Higher Earners', Office for National Statistics, 2022

- Tourism remains a significant asset along the Fylde Coast. Accommodation and Food employment is above regional and national averages in all three local authorities, and tourism in Blackpool alone contributed more than £1.4bn in 2021, supported 6,000 direct jobs, and 1,100 jobs indirectly.
- There is limited evidence of sectoral diversification in Blackpool, as the largest growing sectors by employment were in already strong sectors such as Health, Construction and Wholesale and Retail Trade. However, the growth in Professional and Associate Professional occupations suggests that diversification is occurring within these sectors as higher quality jobs are created.
- Remote working rose sharply between 2011 and 2021 albeit pandemic impacted but is likely to remain widespread.
- The ratio between full-time and part-time workers has remained essentially the same across time for all three districts.

BUSINESS PROFILE

Number and Sizes of Businesses

3.88 In Blackpool, Fylde and Wyre as of 2022 there were 3,870, 3,330 and 4,095 VAT and PAYE registered businesses operating respectively. Overall, there were 271,165 businesses registered in the North West, meaning that Blackpool, Fylde and Wyre accounted for 1.3%, 1.1% and 1.4% respectively of firms within the region. A breakdown of these businesses by size is shown in Table 29 below, wider averages are given for comparison.

Table 29 - Size of Businesses, Fylde Coast, 2011²⁹ vs 2021

Business Size	Blackpool			Fylde			Wyre		
	Bpool 2011	Bpool 2021	Bpool Change	Fylde 2011	Fylde 2021	Fylde Change	Wyre 2011	Wyre 2021	Wyre Change
Micro (0 to 9)	3,450	3,970	+520	2,870	3,235	+365	3,665	4,035	+370
Small (10 to 49)	745	730	-15	415	490	+75	530	550	+20
Medium (50 to 249)	165	180	+15	85	90	+5	75	85	+10
Large (250+)	15	20	+5	15	15	+0	10	5	-5
Total Businesses	4,375	4,900	+525	3,385	3,830	+445	4,280	4,675	+395

Source: SQW and ONS Inter-Departmental Business Register, 2021

3.89 The key trends are:

- Micro firms account for most businesses in the three Local Authorities, 81.0% in Blackpool, 84.5% in Fylde and 86.3% in Wyre, all of which align with the regional average of 88.7% and the national average of 89.7%.
- The trend towards smaller, individual-worker firms is likely to be accentuated by remote working and increased outsourcing to companies with low overheads, in addition to the impact of Covid-19 placing more incentive towards entrepreneurship as a result of the significant number of people furloughed from their jobs during this time.
- Blackpool has the highest number of firms in the medium category with 180, or 3.7% of all businesses, outperforming the regional and national averages proportionally.

3.90 The number of micro businesses has risen substantially across all three districts since 2011. This is broadly positive since it suggests healthy local levels of business start-up, the expansion of businesses from homeworking (where they are not always picked up in data sources), and the attraction of existing micro firms into the sub-region. A study by Manchester Metropolitan University³⁰ reports that survival rates for small businesses in the North West is stronger than the national average in year 1 (90.7% for the North West, and 89.7% for England), and just below national rates in year 5 (38.7% for the North West versus 39.6% survival).

²⁹ SQW Local Economy Baseline for Blackpool, 2011

³⁰ Small Business Impact Conference Situational Report, Manchester Metropolitan University, 2021

Number of Businesses by Sector

3.91 The number of businesses can also be broken down into industry sector. Table 30 below shows the proportion of businesses in each sector and the subsequent Table 31 shows the number of businesses operating in each industry.

Table 30 - Percentage of registered businesses by industry

	Blackpool	Fylde	Wyre	North West	England
Agriculture, forestry & fishing	0.1	5.4	9.5	4.1	3.9
Mining, quarrying & utilities	0.4	0.8	0.7	0.5	0.5
Manufacturing	5.6	5.4	6.5	5.5	4.9
Construction	14.5	11.3	16.4	12.4	13.6
Motor trades	3.5	3.2	3.9	3.2	2.9
Wholesale	3.4	3.3	4.2	4.8	4.0
Retail	12.7	9.3	10.6	9.3	8.1
Transport & storage (inc postal)	5.6	3.3	3.9	5.4	5.1
Accommodation & food services	16.0	7.7	7.4	7.1	6.1
Information & communication	4.1	6.5	3.5	5.1	7.5
Financial & insurance	1.3	2.6	0.9	2.7	2.3
Property	3.7	4.8	3.4	4.1	4.1
Professional, scientific & technical	8.8	15.9	11.5	14.5	16.1
Business administration & support services	7.2	8.1	6.6	8.5	8.5
Public administration & defence	0.0	0.5	0.6	0.2	0.3
Education	1.4	1.7	1.1	1.7	1.8
Health	4.4	4.1	3.4	4.3	3.8
Arts, entertainment, recreation & other services	7.4	6.5	6.0	6.4	6.5

Source: ONS UK Business Counts - enterprises by industry and employment size band

- **Blackpool** - Unsurprisingly, Accommodation & food services has the greatest number of businesses in Blackpool with 620 businesses, or 16% of the total. This is almost 10% higher than the average for the North West and England and reflects the number of hotels, B&Bs and guest houses in the area, some 449, as well as a diverse hot food offer. As noted above in Table 27, this sector remains a high employer locally, albeit with some declines since 2011.

- Construction is another strength of Blackpool. Comparing the number of businesses to the number of recorded employees suggests that each firm employs only three people, on average. This is not surprising though as the sector typically includes a high number of self-employed people, with specialisms, and micro firms who may work as contractors on larger projects
- Blackpool is underrepresented, compared to regional and national averages, in most private office sectors, most dramatically Professional, scientific and technical where, at 8.8 %, the proportion of businesses is only nearly half the proportion in Fylde and the national rate. This is in line with the modest employment levels noted in Table 17 and broadly suggests a gap in Blackpool's business offer.
- **Fylde** - has the highest number of its businesses operating within the Professional, scientific & technical sector with 15.9%. This is in line with the regional (14.5%) and national (16.1%) averages. The Finance & Insurance sector also represented a significantly higher proportion of businesses than Wyre or Blackpool, despite being nominally low compared to the regional average as are the other private office sectors. Combined with jobs numbers this suggests that Fylde Borough does have a strong private office sector, which is not unexpected given the strong offer of office premises found in the Blackpool Airport Enterprise Zone, at Whitehills, St Georges Park Kirkham and in Lytham. The Construction and Retail sectors are somewhat weaker in Fylde than in Blackpool and Wyre but are broadly in line regional and national averages
- **Wyre** has a much larger proportion of businesses operating in Agriculture, forestry & fishing at 9.5% compared to the regional (4.1%) and national (3.9%) averages. This sector also employed double the workers proportionally compared to the region and nation. Wyre has more businesses proportionally in Construction, Retail and Accommodation & food services than the regional and national averages including the largest proportion of Construction businesses in the Fylde Coast at 16.4 %, again primarily sole traders and micro firms. It also has the largest proportion of manufacturing firms, notably above regional and English norms at 6.5 percent or 265 businesses. This reflects the scale of the manufacturing offer in the major industrial estates of Thornton and Poulton-le-Fylde.

Table 31 – Business Count by Industry Sector, Fylde Coast, 2022

	Blackpool	Fylde	Wyre
Agriculture, forestry and fishing	5	180	390
Mining and quarrying	0	0	0
Manufacturing	215	180	265
Electricity, gas, steam and air conditioning supply	5	5	10
Water supply; sewerage, waste management and remediation activities	10	20	20
Construction	560	375	670
Wholesale and retail trade; repair of motor vehicles and motorcycles	755	520	765
Transportation and storage	215	110	160
Accommodation and food service activities	620	255	305
Information and communication	160	215	145
Financial and insurance activities	50	85	35
Real estate activities	145	160	140
Professional, scientific and technical activities	340	530	470
Administrative and support service activities	280	270	270
Public administration and defence; compulsory social security	0	15	25
Education	55	55	45
Human health and social work activities	170	135	140
Arts, entertainment and recreation	100	80	90

Source: ONS UK Business Counts - enterprises by industry and employment size

3.92 Looking at total business count clearly reveals the local authorities' respective strengths: Blackpool in Accommodation & Food; Fylde in Professional, Scientific and Technical; and Wyre in Construction and Agriculture.

- The number of businesses in Public administration & defence, Education and Health is modest compared to the numbers employed; however, the above data only accounts for private businesses. Public institutions with high, and growing, rates of employment, such as the NHS, are not counted. In this regard it is noted that Blackpool has no private businesses which can be classed as being in Public administration and defence.
- Aside from these, the Financial & Insurance sector and the Mining, Quarrying and Utilities sector have few registered businesses in Blackpool, Fylde and Wyre.

Growth of Business

3.93 Table 32 below illustrates how the total number of businesses within each sector has changed from 2011-2021, allowing comparison between employment growth and business growth. Each sector is represented by a number in the graph, these numbers correspond with the sectors in Table 31 above.

Table 32 - Change in Sectoral Businesses, 2011-2021

	Blackpool	Fylde	Wyre
Agriculture, forestry and fishing	-5	0	-20
Mining and quarrying	0	0	0
Manufacturing	30	35	25
Electricity, gas, steam and air conditioning supply	0	5	5
Water supply; sewerage, waste management and remediation activities	5	0	0
Construction	185	60	125
Wholesale and retail trade; repair of motor vehicles and motorcycles	-5	-5	-30
Transportation and storage	185	40	70
Accommodation and food service activities	105	45	70
Information and communication	20	40	35
Financial and insurance activities	-5	35	-5
Real estate activities	10	10	15
Professional, scientific and technical activities	45	115	70
Administrative and support service activities	70	75	85
Public administration and defence; compulsory social security	0	5	25
Education	15	-5	-5
Human health and social work activities	-35	10	-15
Arts, entertainment and recreation	0	-5	0

Source: ONS UK Business Counts - enterprises by industry and employment size

3.94 The following business sectors experienced the largest increase by business count:

- **Blackpool:** Transport & Storage (+185); Construction (+185); Accommodation & Food (+105)

- **Fylde:** Professional & Scientific (+115); Business Administration & Support (+75) and Construction (+60)
- **Wyre:** Construction (+125); Business Administration & Support Services (+85); Accommodation & Food Services (+70).

Table 33 - Percentage Change in Business Count by Industry 2011-2021

	Blackpool	Fylde	Wyre	North West	England
Agriculture, forestry & fishing	-33.3	0	-4.8	0.4	0
Mining, quarrying & utilities	66.7	25	0.0	50	92
Manufacturing	15.4	25	10	13.1	13
Construction	50.6	19.3	23.6	33.14	41
Motor trades	13.0	-9.1	6.45	17.5	20
Wholesale	7.4	0.0	0.0	12.3	4
Retail	-4.9	3.4	-8.6	23.7	22
Transport & storage (inc postal)	217.6	47.0	60.9	120.4	119
Accommodation & food services	22.8	22.5	30.43	39.8	33
Information & communication	13.8	19.5	28	39.9	45
Financial & insurance	-8.3	70	-11.1	50.2	42
Property	7.7	6.5	13.0	41.4	43
Professional, scientific & technical	13.8	26.4	17.5	37.5	38
Business administration & support services	35	42.9	44.7	71.4	66
Public administration & defence	0.0	50	50	166.7	173
Education	37.5	-8.3	-11.1	47.7	47
Health	-17.5	-8.7	-9.7	27.6	28
Arts, entertainment, recreation & other services	5.7	-2.4	-7.8	24.8	21

Source: ONS UK Business Counts - enterprises by industry and employment size band

- Transport and storage has seen recent growth in business numbers, most dramatically in Blackpool, but employment numbers remain small and the sector has seen zero or negative jobs growth. This suggests that any new businesses in the sub-region are micro firms or sole traders engaged in ‘final mile’ delivery activities rather than larger logistics operations.

- As mentioned, the Construction industry is similarly dominated by sole traders and micro businesses, and experienced strong growth in business numbers across all geographies, which again reflects the recovery of the industry from its post-recession state.
- The decrease in the number of businesses in the Health sector in **Blackpool** was much larger proportionally (17.5%) than the wider area averages shown in the table above. Interestingly, (as noted above in the section ‘Employment by Industry’), the number of health employees has grown substantially in the last few years. The decrease in business numbers could also indicate business consolidation in the private element of the health sector. As a result, the relationship between health employment and the number of businesses in the sector is indirect.
- Blackpool also saw a modest growth in the number of manufacturing businesses against reducing employment numbers but, as mentioned modernisation in the sector is increasing business productivity and reducing the number of employees each business requires.
- **Fylde** had the largest proportional increase in business numbers in the Transport & Storage (incl. postal) sector (+47%), although this was still much lower than the corresponding Blackpool increase of 217%. Other sectors in which business numbers grew substantially were the Professional & Scientific (+26.4%) and Business Administration & Support (+42.9%).
- **Wyre** saw its biggest nominal decrease in the retail sector (-40 businesses, -8.6%) while proportionally, the largest drop occurred in Financial & Insurance and Education (both experiencing a decrease of -11.1%). Conversely, Wyre exhibited the biggest percentage increase in Transport and Storage (+60.9%), and Business Administration, with a rise of 45%. Wyre along with Fylde experienced a large percentage increase in businesses operating in the Public Administration & Defence sector, although this was from a low baseline.

Location Quotient

- 3.95 The location quotient shows the strength and size of an industry in a region. A location quotient greater than one indicates that a sector is more important locally than it is nationally, whereas a quotient of less than one indicates that a sector is less significant locally. The resulting figure is a way of quantifying how concentrated an industry is within an area compared to the country as a whole. It should be noted that the quotient reflects the existing position of industries so should be viewed in conjunction with sectoral projections in Table 18.

- 3.96 The use of the location quotient is a powerful way to identify growth opportunities and comparative regional advantages. It is important to evaluate the growth of particular industries to predict the demand and supply of a region, which can be useful when making decisions regarding commercial real estate developments etc. Understanding the importance of certain industries within regions can help to predict the effects that growth or decline within this industry will have on the economic health of the region. The formulas used for calculating location quotient is below:³¹

Location Quotient = Regional Industry Concentration / National Industry Concentration

Industry Concentration = Average Industry Employment / Total Employment

- 3.97 For example, in the case of Blackpool, a decline in the location quotient from 2012³² indicates employment is less concentrated in these sectors: Accommodation & food services (2.1 to 1.65), Construction (0.8 to 0.56) and Agriculture (0.1 to 0.03). In contrast, the following sectors exhibit higher employment concentration: Information & communication (0.2 to 0.27), Financial & Insurance (0.3 to 0.42) and Public Administration & Defence (2.0 to 3.25).

³¹ Property metrics, 2023

³² Towards an objective assessment of housing need in Blackpool, Amion, 2014 – NB: historic location quotient data for Fylde and Wyre is not available and thus a historic comparison has not been provided for consistency across the three local authorities

Table 34 - Location Quotient by Industry, Fylde Coast, 2023

Industry	Blackpool	Fylde	Wyre
Agriculture, forestry & fishing	0.03	1.07	2.07
Mining, quarrying & utilities	0.23	0.43	1.84
Manufacturing	0.72	3.04	1.44
Construction	0.56	1.31	1.91
Motor trades	0.73	0.75	1.09
Wholesale	0.53	0.41	1.05
Retail	1.02	0.84	1.35
Transport & storage (inc postal)	0.67	0.34	0.53
Accommodation & food services	1.65	1.52	1.64
Information & communication	0.27	0.54	0.40
Financial & insurance	0.42	0.69	0.19
Property	0.67	0.62	0.75
Professional, scientific & technical	0.33	1.63	0.58
Business administration & support services	0.51	0.49	0.31
Public administration & defence	3.25	0.74	0.64
Education	0.80	0.58	1.05
Health	1.85	0.76	1.15
Arts, entertainment, recreation & other services	1.46	0.59	1.08

Source: Property Metrics, 2023

- 3.98 Blackpool performs well in the Health, Accommodation, and Arts sectors, while Fylde shows significant strength in the Manufacturing, Construction, Accommodation, and Professional Sciences industries. Wyre performs strongly in most sectors, with a particularly high location quotient for the Agriculture, Forestry and Fishing industry.
- 3.99 Note that a high location quotient itself does not mean that a sector will undergo high future growth, as it may instead be a legacy position, but it does indicate each area's comparative advantages. For example, Fylde is projected to experience growth in its Construction sector between now and 2042, while its manufacturing sector is expected to decline, even though both have high location quotients.

Business Profile – Conclusions

Blackpool: Micro-businesses have become more common, and the Accommodation sector remains large by business count and proportion.

Fylde: Micro-businesses and the Professional & Scientific sector experienced large growth since 2011.

Wyre: Micro-businesses and Construction businesses experienced large growth since 2011.

- The increased concentration of micro-businesses (in line with regional and national averages) could reflect greater resilience to economic downturns across the districts.
- Future planning policy in these districts should account for the growth in specific business sectors, such as Construction and Accommodation & Food Services, when making decisions regarding land use.
- Business count growth does not necessarily reflect employment growth, which is proven by the sharp rise in Transport sector despite its low employee headcount, and the fall in registered Health businesses even as sector employment grew.

GVA BY INDUSTRY

3.100 Table 35 below shows GVA in pounds million for Blackpool, Fylde and Wyre between 2011 and 2021.³³

Table 35 - Total GVA, Fylde Coast, 2011-2021³⁴

£m, 2019 prices	Blackpool	Fylde	Wyre
GVA 2011	1,991	2,470	1,226
GVA 2021	2,704	2,654	1,660
% increase, 2011-2021	+35.8%	+7.4%	+35.4%

Source: Regional gross value added (balanced) by industry: local authorities by ITL1 region, 2021

- Blackpool and Wyre have seen steady growth over the last decade, with GVA in 2021 measured at almost 36% higher than in 2011 in Blackpool and 35% higher in Wyre.
- Conversely, Fylde’s performance has been more mixed: a peak in 2017 was followed by a decline bringing GVA back down to only 7.4% above its 2011 level. However, it should be noted that Fylde started at a substantially higher baseline than either of the other two districts.

3.101 Table 36 breaks down GVA by industry using the latest available data (2021) for the three local authorities with growth in green, modest losses in amber and larger losses red. Values are in £m at 2019 prices.

- The Services sector is a significant and growing area for **Blackpool**, with Accommodation & Food GVA rising by 21% over the last decade and Health by 90%. The biggest value decline occurred in the Construction sector, which fell by 14% or £13m.
- The Manufacturing and Production sector is by far the most prominent in **Fylde** and rose by 27% to over £900m. In contrast, the Financial & Insurance sector was near its peak in 2011 and since then has lost 89% of its value.
- **Wyre**, in contrast to Blackpool and Fylde, saw substantial growth in its Construction sector: a 38% rise to £139m. The Health sector grew by 59% in value, while Agriculture more than doubled. Again, Finance and Insurance fell sharply (-59%).

³³ Regional gross value added (balanced) by industry: local authorities by ITL1 region, 2021

³⁴ Please note that ONS and Cambridge Econometrics use distinct data measurement methodologies and different time periods and as such there are differences in employment and GVA between the two.

- Other notable sectors in terms of output for all three local authorities include Wholesale and Retail trade, Real Estate Activities and Education.

Table 36 - GVA balanced by industry, current prices (£m, 2019 prices)

	Blackpool 2011	Blackpool 2021	Blackpool Variance	Fylde 2011	Fylde 2021	Fylde Variance	Wyre 2011	Wyre 2021	Wyre Variance
Agriculture	16	22	+38%	17	57	+235%	45	137	+204%
Manufacturing	135	190	+41%	710	905	+27%	134	252	+88%
Construction	90	77	-14%	136	104	-24%	101	139	+38%
Wholesale and Retail trade	255	320	+25%	122	185	+52%	176	234	+33%
Transportation & Storage	35	38	+9%	25	18	-28%	49	25	-49%
Accommodation & Food	128	155	+21%	61	79	+30%	52	72	+38%
Information & Communication	18	46	+56%	175	79	-55%	31	57	+84%
Financial & Insurance	50	39	-22%	318	36	-89%	32	13	-59%
Real Estate	240	259	+8%	260	266	+2%	257	281	+9%
Professional & Scientific	46	74	+61%	164	263	+60%	44	50	+14%
Administrative & Support	57	84	+47%	35	68	+94%	17	28	+65%
Public Administration & Defence	268	414	+54%	119	88	-26%	49	48	-2%
Education	179	193	+8%	65	92	+42%	103	138	+34%
Health	351	667	+90%	204	365	+79%	92	146	+59%
Arts & Recreation	99	99	0%	10	8	-20%	12	17	+42%
Other³⁵	25	26	+4%	41	41	0%	14	13	-7%
All	1,991	2,704	+35.8%	2,470	2,654	+7.4%	1,226	1,660	+35.4%

Source: Regional gross value added (balanced) by industry: local authorities by ITL1 region, 2021

³⁵ 'Other' includes arts, entertainment and recreation; activities of households as employers; undifferentiated goods and services producing activities of households for own use; and other service activities.

3.102 The Cambridge Econometrics projections for 2042 GVA for each district are presented below.³⁶

Table 37 - Forecast GVA, Fylde Coast, 2042

£m, 2019 prices	Blackpool	Fylde	Wyre
GVA, 2022	£2,613,001,800	£2,283,836,400	£1,614,653,500
GVA Projection 2042	£3,266,659,800	£2,769,976,300	£2,023,262,200
% increase, 2022-2042	+25%	+21%	+25%

Source: Cambridge Econometrics, 2023

3.103 The Fylde Coast sees an uplift in GVA to 2042 with Blackpool and Wyre achieving 25% uplift and Fylde achieving 21%. A breakdown of projected change in GVA by industry can be found in Table 38 below.

³⁶ It should be noted that that Cambridge Econometrics employs its own distinct local economy forecasting model to measure and project GVA and employment, and as a result its estimates differ from those produced by ONS.

Table 38 - Forecast GVA by Industry, 2022-2042

GVA by Industry (£m)	Blackpool						Fylde						Wyre					
	Bpool 2022	Bpool %	Bpool 2042	Bpool %	Bpool Change	Bpool % Change	Fylde 2022	Fylde %	Fylde 2042	Fylde %	Fylde Change	Fylde % Change	Wyre 2022	Wyre %	Wyre 2042	Wyre %	Wyre Change	Wyre % Change
A: Agriculture, forestry and fishing	£ 12	0%	£ 16	0%	£ 4	33.3%	£ 22	1%	£ 29	1%	£ 7	30.3%	£ 22	1%	£ 28	1%	£ 7	30.2%
B: Mining and quarrying	£ -	0%	£ -	0%	£ -	-	£ -	0%	£ -	0%	£ -	-	£ -	0%	£ -	0%	£ -	-
C: Manufacturing	£ 279	11%	£ 340	10%	£ 61	21.9%	£ 952	42%	£ 1,065	38%	£ 113	11.9%	£ 294	18%	£ 352	17%	£ 59	20.0%
D: Electricity, gas, steam and air conditioning supply	£ 13	1%	£ 14	0%	£ 1	5.0%	£ 8	0%	£ 9	0%	£ 1	9.6%	£ 110	7%	£ 119	6%	£ 9	7.8%
E: Water supply; sewerage, waste management	£ 20	1%	£ 21	1%	£ 1	6.0%	£ 27		£ 29	1%	£ 2	6.0%	£ 34	2%	£ 36	2%	£ 2	5.5%
F: Construction	£ 132	5%	£ 162	5%	£ 30	22.4%	£ 138	6%	£ 185	7%	£ 46	33.4%	£ 152	9%	£ 197	10%	£ 46	30.0%
G: Wholesale and retail trade; repair of motor vehicles	£ 299	11%	£ 388	12%	£ 90	30.1%	£ 172	8%	£ 223	8%	£ 51	30.0%	£ 228	14%	£ 305	15%	£ 77	33.6%
H: Transportation and storage	£ 68	3%	£ 80	2%	£ 12	17.8%	£ 43	2%	£ 58	2%	£ 15	35.6%	£ 33	2%	£ 39	2%	£ 6	18.1%
I: Accommodation and food services activities	£ 183	7%	£ 178	5%	£ -5	-2.9%	£ 105	5%	£ 113	4%	£ 7	7.1%	£ 95	6%	£ 93	5%	£ -2	-2.0%
J: Information and communication	£ 73	3%	£ 108	3%	£ 35	48.3%	£ 75	3%	£ 109	4%	£ 34	45.3%	£ 54	3%	£ 79	4%	£ 25	47.1%

Fylde Coast Economic Needs Update & Employment Land Review – Final Report, August 2024

GVA by Industry (£m)	Blackpool						Fylde						Wyre					
	Bpool 2022	Bpool %	Bpool 2042	Bpool %	Bpool Change	Bpool % Change	Fylde 2022	Fylde %	Fylde 2042	Fylde %	Fylde Change	Fylde % Change	Wyre 2022	Wyre %	Wyre 2042	Wyre %	Wyre Change	Wyre % Change
K: Financial and insurance activities	£ 74	3%	£ 97	3%	£ 22	30.3%	£ 69	3%	£ 90	3%	£ 21	30.3%	£ 19	1%	£ 25	1%	£ 6	30.9%
L: Real estate activities	£ 74	3%	£ 110	3%	£ 36	48.2%	£ 53	2%	£ 78	3%	£ 25	48.2%	£ 42	3%	£ 69	3%	£ 26	62.5%
M: Professional, scientific and technical activities	£ 85	3%	£ 97	3%	£ 13	15.0%	£ 183	8%	£ 216	8%	£ 33	18.1%	£ 75	5%	£ 88	4%	£ 14	18.2%
N: Administrative and support service activities	£ 107	4%	£ 115	4%	£ 8	7.6%	£ 77	3%	£ 83	3%	£ 6	7.6%	£ 43	3%	£ 48	2%	£ 5	11.2%

Source: Cambridge Econometrics, 2023

- **Blackpool:** Public Administration and Real Estate are projected to increase in value added to the local economy in Blackpool, with a +£159m (+41.3%) and +£35.8m (+48%) respective increase. Public Administration also has the largest growth in nominal terms, which reflects the importance of public sector employment to the local economy. The main sector expected to decline is Arts & Entertainment (-10.4%). The traditional Blackpool strength of Accommodation and Food will experience a small decrease in value (-2.9%), even as the number of jobs in this sector is expected to increase. This result could be reflective of the increasingly low value nature of these jobs, particularly compared with sectors such as Information and Communication (+48.3%).
- **Fylde:** Meanwhile in Fylde, the relatively strong Construction sector is expected to grow over time (+33.4%), as is Education industry (+50.3%). Interestingly, the value added of the Manufacturing industry is projected to increase by £113m (+11.9%), despite the previously noted significant decline in the number of jobs in this sector, especially for Fylde. This further evidences the shift from manual to automatic labour in this field and the improvements in productivity from automation.
- **Wyre:** Finally in Wyre, GVA for Construction (+30%) is also set to grow consistently, alongside the district's strong Agriculture sector (+30.2%). The Education sector is further set to see an increase in value added of c.£54m (+38.8%) growth in alignment with the projected increase in employment in this industry discussed previously, as is the Health and Social Work sector (+30.7%). In nominal terms, the largest GVA increase will be in the Wholesale and Retail Trade sector, a rise of £77m.

GVA – Conclusions

Blackpool: The biggest GVA growth sectors since 2011 were Health and Professional & Scientific.

Fylde: The biggest GVA growth sectors since 2011 were Agriculture and Administrative Support.

Wyre: The biggest GVA growth sectors since 2011 were Agriculture and Information & Communication.

- Sectors that experienced high GVA growth over the last decade, such as Health, Manufacturing, Accommodation & Food and Construction are generally projected to continue that growth over the next 30 years, as well as an increase in employment in these sectors.

HOUSEHOLDS

Gross Disposable Household Income (GDHI)

3.104 Table 39 below shows the GDHI per head alongside the percentage change in this from the previous year.

- A broad increase in GDHI across all geographies between 2011 and 2021 can be observed.
- In 2021 Fylde had the largest GDHI and exceeded both the national and regional averages. Wyre had the second largest of the districts and was above the regional average whereas Blackpool had the lowest out of all the areas.
- Despite this Blackpool increased or maintained every individual year whereas Fylde and Wyre have seen a decrease from 2019-2020. This may be due to the impacts of the pandemic as England also saw a decrease in this time frame, while Blackpool benefitted somewhat as a domestic tourist destination.
- The two biggest year-on-year rises in GDHI were the 5.8% increase observed from 2014-2015 in Fylde and the 6.6% increase from 2018-2019 in Wyre.

Table 39 - GDHI by local authority, Fylde Coast

Date	Blackpool		Fylde		Wyre		North West		England	
	Bpool GDHI per head (£)	Bpool % Change	Fylde GDHI per head (£)	Fylde % Change	Wyre GDHI per head (£)	Wyre% Change	NW GDHI per head (£)	NW % Change	England GDHI per head (£)	England % Change
2011	13,349	-	18,148	-	15,193	-	14,516	-	16,587	-
2012	13,390	0.3	18,508	2.0	15,488	1.9	14,948	3.0	17,195	3.7
2013	13,717	2.4	18,901	2.1	16,044	3.6	15,439	3.3	17,900	4.1
2014	14,116	2.9	19,396	2.6	16,396	2.2	15,835	2.6	18,452	3.1
2015	14,651	3.8	20,525	5.8	16,856	2.8	16,589	4.8	19,504	5.7
2016	15,094	3.0	20,657	0.6	17,011	0.9	16,692	0.6	19,729	1.2
2017	15,630	3.5	21,087	2.1	17,742	4.3	17,164	2.8	20,179	2.3
2018	15,976	2.2	21,939	4.0	18,202	2.6	17,746	3.4	20,971	3.9
2019	16,571	3.7	22,492	2.5	19,407	6.6	18,371	3.5	21,644	3.2
2020	16,713	0.8	21,877	-2.7	19,146	-1.3	18,418	0.3	21,414	-1.1
2021	16,717	0.0	22,514	2.9	19,979	4.4	18,864	2.4	21,679	1.2

Source: ONS GDHI by local authority, 2016-2020

Average Household

3.105 The average gross annual earnings of full-time workers are shown in Table 40 below alongside the percentage change from 2011-2022.

- Blackpool exhibited the greatest percentage increase over the last decade, rising by 30%, but income levels remain substantially below the regional and national averages.
- Fylde had the highest annual earnings in 2011, but consequently grew the slowest, while Wyre earnings grew at a slightly slower pace than the national average.

3.106 It should be noted that the recession led to a pronounced slowdown in English wage growth between 2009 and 2011, and as such comparing these figures with 2022 may slightly distort the extent to which wages grew.

Table 40 - Average Full-time Earnings (£2,018 prices)

Area	2011	2022	Percentage Change (2011-2022)
Blackpool	19,443	25,288	30%
Fylde	29,094	32,812	12%
Wyre	23,930	30,035	25%
North West	23,852	31,392	32%
England	26,010	33,894	30%

Source: ONS Annual Survey of Hours and Earnings

3.107 It is important to look at this data as demand side factors can impact business generation and employment. If people have more money this will lead to an increase in spending, which will drive business growth and lead to increased employment. If an area is spending more this will also attract more businesses and investment, which in turn increases business generation and employment.

3.108 Blackpool also has a notably high benefits claimant count (7.2% of the population vs 4.2% for the Lancashire-14 area³⁷ as of March 2023). The Department of Work and Pensions recorded the average household on Universal Credit as receiving approximately £800 a month, equivalent to £9,600 a year. Fylde and Wyre, in contrast, have claimant counts more in line with the regional average.

CLIMATE CHANGE AND THE GREEN ECONOMY

3.109 As part of the economic assessment, the green economy is reviewed at high level to identify the scale of the sector, and its current and future impact across the Fylde Coast. Commentary is provided on risk and opportunities to industry sectors.

3.110 Paragraph 11, of the NPPF (2023) notes that “all plans should promote a sustainable pattern of development that seeks to: meet the development needs of their area; align growth and infrastructure; improve the environment; mitigate climate change (including by making effective use of land in urban areas) and adapt to its effects.” In 2019, both Blackpool and Wyre councils made climate emergency declarations and produced

³⁷ The Lancashire-12 area is comprised of the 12 local authorities that fall within the Lancashire County Council administrative boundary. The Lancashire-14 area incorporates the two additional unitary authorities of Blackburn with Darwen and Blackpool and has the same geographic footprint as the Lancashire Local Enterprise Partnership (LEP) area.

strategies/ action plans. This links to the wider UK Government Strategy to decarbonise all sectors of the UK economy to achieve net zero, in terms of carbon emissions, by 2050.

3.111 The Lancashire Climate Resilience Study 2018 examined the potential harm to the economy presented by an increase in emissions and global warming. It highlights issues such as drought, sea level rise, flooding, and risks to agriculture.

3.112 Blackpool Council's declaration of a climate emergency, included a commitment to cut the Council's own emissions to zero by 2030, with the Climate Action Plan setting out targets to:

- Reduce emissions, not compensate for them
- Work with residents, collaborating on the action plan
- Lead by example, informed by analysis by leading environmental experts
- Ensure a "just" transition to net zero, catering towards the social and economic situation of local people
- Focus on the positives and aiming to benefit as many people as possible during the process

3.113 Notable projects and activities in this regard with implications for relevant industry sectors include:

- Exploring a solar farm at Blackpool Airport and battery storage
- Ambitions to drive all housing to at least EPC C rating
- Developing an Electric Transport Strategy

3.114 Wyre Council has a pledge for its activities to be net zero by 2050. In its Draft Climate Change Strategy it sets out the threats in terms of drought, flooding and rises in sea levels, and extreme heat. It also sees the positive effects of galvanising communities to action in terms of:

- Increased carbon storage within natural landscapes, such as peatland, grasslands, saltmarsh and via our trees and hedgerows.
- Using the local farming community, who provide local sources of food and have potential to combat climate change whilst generating profits via new government Environmental Land Management schemes.
- Natural flood protection along the coastline through saltmarsh enhancement as well as on uplands and green spaces within the borough.

- Opportunities for increased water storage within natural habitats to reduce water stress during prolonged droughts.
- Potential for renewable energy generation, via solar farms, wind farms, or harnessing the power of the sea via tidal energy, which can be utilised for community benefit.
- Close-knit, strong communities across Wyre who are key to enabling climate action and improving their local area.

3.115 Wyre has eight key objectives linked to individual action plans as follows:

- Buildings Retrofit - decarbonise buildings and heating systems
- Transport - support decarbonised, safe and sustainable transport.
- Net zero council - embed climate action across council governance and financial decision-making.
- Planning -use our planning powers to plan for a low carbon and climate resilient future.
- Biodiversity - Protect and increase biodiversity.
- Engagement - collaborate, educate and engage with others to take climate action.
- Waste - reduce waste - support a circular economy and sustainable food production.
- Adaptation - adapt to our changing climate.

3.116 From this it can be seen that the relevant elements for industry sectors includes construction and waste management.

3.117 Fylde has made a general commitment to net zero along the principles of national guidance and has committed to the development of a climate change strategy. It has undertaken to reduce both the carbon footprint of the Council itself and effect positive change in its communities. It is a potential location for landward infrastructure servicing two large scale wind farms off the Lancashire Coast which could supply power to a substantial proportion of the local population in the west of Lancashire.

3.118 In spite of the lack of an adopted strategy the relevant industry sectors are likely to be those of the other boroughs as reflected below.

3.119 Therefore, climate change has the potential to cause significant damage to productivity and employment, but actions to address global warming, such as policy initiatives and diversification, provide opportunities to expand and improve the Green Economy. In particular many councils are focused on the immediate opportunities to upskill workers to act in the roles of low carbon consultancy and the fitting of applications – with particular

benefits to construction related jobs. In reality the scope is wider and encompasses:

- Construction
- Waste management
- Transport
- Utilities

3.120 Tables 41-43 below show the core industries associated with the green economy and summarises their pattern of growth from 2011 to 2021, and into the 2022-2042 Local Plan period for each authority in the Fylde Coast. It should be noted that these industry sectors are shown here in terms of their entirety of sectoral performance and reflect the data in the wider report. Therefore, what follows is the potential growth in sectors, part of which may be the result of activity to reduce climate change impacts.

Table 41 – Blackpool Employment by Industry, Green Economy

Industry	Blackpool			
	Past Growth % (2011-2021)	2022	2042	Future Growth (2022-2042)
Agriculture, forestry & fishing	44%	294	308	4.6%
Manufacturing	-18%	3,848	3,430	-10.9%
Electricity, gas, steam and air conditioning supply	45%	59	55	-7.1%
Water supply; Sewerage, Waste management and Remediation activities	-9%	119	117	-1.2%
Construction	6%	3,332	3,522	5.7%
Transport and Storage	-12%	2,935	3,085	5.1%
Information & Communication	-20%	1,041	1,463	40.6%
Real estate activities	1%	882	937	6.2%
Professional, scientific & technical	2%	2,600	2,731	5.1%
Human health and social work activities	32%	17,639	19,137	8.5%

Source: Census 2011, Census 2021, and Cambridge Econometrics 2023

Table 42 – Fylde Employment by Industry, Green Economy

Industry	Fylde			
	Past Growth (2011-2021)	2022	2042	Future Growth (2022-2042)
Agriculture, forestry & fishing	0%	550	563	2.3%
Manufacturing	-23%	8,985	6,354	-29.3%
Electricity, gas, steam and air conditioning supply	209%	34	33	-2.9%
Water supply; Sewerage, Waste management and Remediation activities	11%	158	156	-1.1%
Construction	20%	3,497	4,027	15.2%
Transport and Storage	4%	1,459	1,624	11.3%
Information & Communication	-14%	1,273	1,710	34.3%
Real estate activities	11%	623	662	6.2%
Professional, scientific & technical	5%	6,012	6,484	7.9%
Human health and social work activities	31%	4,588	5,440	18.6%

Source: Census 2011, Census 2021, and Cambridge Econometrics 2023

Table 43 – Wyre Employment by Industry, Green Economy

Industry	Wyre			
	Past Growth (2011-2021)	2022	2042	Future Growth (2022-2042)
Agriculture, forestry & fishing	2%	540	552	2.2%
Manufacturing	-16%	3,711	3,282	-11.6%
Electricity, gas, steam and air conditioning supply	65%	482	460	-4.6%
Water supply; Sewerage, Waste management and Remediation activities	-26%	201	198	-1.6%
Construction	5%	3,832	4,303	12.3%
Transport and Storage	-12%	1,458	1,535	5.3%
Information & Communication	-9%	829	1,141	37.7%
Real estate activities	16%	501	584	16.5%
Professional, scientific & technical	-5%	2,303	2,524	9.6%
Human health and social work activities	21%	6,097	7,226	18.5%

Source: Census 2011, Census 2021, and Cambridge Econometrics 2023

3.121 The performance of green industries across the Fylde Coast is expected to improve from past trends where several sectors have seen decline since 2011. The construction sector, in particular, across all three districts is expected to show steady growth. The following paragraphs discuss the relevance of these findings in regard to green industries.

Retrofit and Decarbonisation Demand

3.122 National initiatives to reduce carbon emissions and improve heating efficiency of homes create demand across the construction sector for businesses to specialise in retrofit and carbon saving technology. The construction industry across the Fylde Coast has seen moderate growth since 2011, with a total of 4,683 employees in Blackpool (an increase of 5.6 percent from 2011), 2,605 employees in Fylde (an increase of 19.9 percent from 2011), and 4,536 employees in Wyre (an increase 5.2 percent from 2011). This growth is forecast to persist in the long-term as a result from the continued demand for housing development, with an additional 1,192 employed in the sector in 2042, across the Fylde Coast (an 11.2 % increase).

3.123 The Future Homes Standard (FHS) is set to become mandatory for housing construction in 2025 and aims to ensure that new homes built from 2025 will produce 75-80 percent fewer carbon emissions than homes built under the current Building Regulations. The continued growth of the construction sector, on the Fylde Coast, indicates capacity and opportunity to upskill the local supply chain to specialise in net zero construction, and reduce carbon emissions of existing and new-build industrial, commercial and residential stock. Taking advantage of the opportunities presented by this will require upgrades in local construction sector skills. However, as noted in Section 5.0, and elsewhere, the majority of local Construction businesses are micro and smaller traders who may lack the resources and time for training, so this is an area where local skill providers could usefully provide support.

Agricultural Yields

3.124 The Fylde Coast's agricultural sector currently contributes some £56 million in GVA to the local economy, which is forecast to grow by 30 percent to £73 million by 2042, despite being expected to see negligible job growth (from 1,384 people to 1,423 people, a 2.8 percent growth rate). Fylde and Wyre are home to some of the "most productive land in Lancashire", with most farmland being dedicated to grassland for livestock, followed by cereals.

Table 44 – Agricultural Sector; Farmland by Crop Type, Fylde Coast

	Farmed Area (hectares)	Cereals (hectares)	Arable (hectares)	Fruit & Veg (hectares)	Grassland (hectares)
Blackpool and Fylde	11,183	2,092	976	-	7,651
Wyre	22,889	2,594	1,154	33	18,336

Source: Department for Environment, Food, & Rural Affairs

3.125 Agriculture is particularly vulnerable to shocks created by climate change, such as changing weather patterns limiting the growth of arable crops and impacts in relation to cattle husbandry.

3.126 The Lancashire Climate Resilience study highlights the main risks as:

- Vegetation change
- Invasive species, pests and disease
- Loss of habitat, erosion of land
- Water supply shortages
- Higher soil moisture content over winter
- Risk of stream, river, sewer floods, and pollution runoff
- Damage to agriculture from storms and heatwaves
- Wildfires

3.127 Although the potential impacts from climate change are not positive, the Study indicates that opportunities may be:

- Potential for new crops
- More rapid vegetation growth and longer growing season for some species
- Diversification to leisure and hospitality uses associated with a rural setting

3.128 Additionally, mitigation could relate to diversifying the crop grown, changing planting dates, adjusting practices in relation to livestock, and better land management to improve soil quality.

Other Opportunities for Growth

3.129 As fossil fuels and non-renewable resources become too costly, both in monetary terms and their impact on the environment, a shift towards renewable energy sources such as wind and solar farms is created. Domestic Gas is the highest contributor of carbon emissions across the Fylde Coast, indicating a substantial shift of existing homes to

renewable energy sources is essential to help mitigate the negative impact on the environment, creating opportunities for retrofitting and renewable energy companies across Fylde Coast. In this regard it is recognised that the Hillhouse Enterprise Zone is a growing centre for energy generation, storage and related businesses.

- 3.130 Businesses across a variety of sectors have the opportunity to invest in the Green Economy, such as the specialisation of digital and IT companies into developing carbon capture technology, improvement of sustainable public transport provision, and development of renewable district heating solutions across the Fylde coast.

Net Zero Awareness

- 3.131 Improvements in carbon literacy and understanding climate change are instrumental in delivering effective change across an economy as citizens need to understand why they need these new green initiatives to ensure the demand for uptake is maintained. As such, the authorities should closely monitor understanding of climate change across the populace, promoting initiatives to improve awareness and behavioural shifts towards an eco-friendly lifestyle.
- 3.132 In the review of employment sites, and Employment Areas, in Section 7.0, issues relevant to climate change, such as flood risk and accessibility via public transport, inform our conclusions and recommendations on individual sites.
- 3.133 Table 45 considers some of the economic opportunities for the Fylde Coast, and its property market, which may result from the above issues and how these can be linked to relevant actions from the Blackpool and Wyre climate Emergency/Climate Change Action Plans.
- 3.134 However, one relevant constraint from increased action in tackling Climate Change will be greater difficulty in delivering new office premises. As is discussed in Section 4.0, post the Covid-19 Pandemic businesses are increasingly seeking high grade, flexible accommodation which meets the highest environmental standards. This helps companies meet their Environmental, Social and Governance (ESG), and similar, targets as well as encouraging staff to come back to the office after the Lockdowns. However, achieving the highest building quality standards for office development, i.e. Building Research Establishment Environmental Assessment Methodology (BREEAM) 'Outstanding' and an Energy Performance Certificate (EPC) rating of 'A' can add considerable cost to a development, at a time when high construction costs are already inhibiting viability on

many new build schemes. The highest specification offices can require rents of up to £40/sqft (£431/sqm) to be viable, rates difficult to achieve in regional cities and far beyond peak rents on the Fylde Coast, identified in Section 4.0 as being £10-12/sqft (£108-129/sqm).

3.135 Meeting the highest environmental standards can cause viability constraints in the industrial and warehouse sectors as well, but there is more scope to change property designs and specifications here to achieve financially viable schemes.

Table 45 – Climate Change, Local Property Market/Land Need Opportunities

Sector Impacted	Fylde Coast Property Market/Land Need Opportunities	Links to Blackpool Climate Emergency Action Plan, 2021 and the Wyre Draft Climate Change Strategy 2024
Construction	<p>An increased need to retrofit and upgrade residential and commercial properties will boost the construction sector, which is dominated, on the Fylde Coast, as elsewhere, by micro firms employing less than ten staff. A growing micro firm based construction sector will increase demand for light industrial, small storage and associated yard spaces. As is noted in Section 4.0, the strongest segment of local market demand is already for industrial/warehouse properties of sub-500 sqm each and stakeholders feel there is a shortage of such properties across the Fylde Coast. Demand for smaller space, combined with the good financial returns which can be achieved in delivering such units means that sub 500 sqm properties are actively being delivered on a number of employment sites and within Employment Areas across the Fylde Coast. An expanding construction sector will therefore increase this existing development trend.</p>	<p>Blackpool Climate Emergency Action Plan Actions 1-3 and 4-12 of Theme 1: Housing (Pages 20-21) and Actions 14, 18-19 of Theme 2: Buildings and Built Environment (Page 21) discuss a range of physical investments in the residential and commercial stock, proposed to achieve Climate Emergency targets. All will boost construction sector activity.</p> <p>Wyre Draft Climate Change Strategy Under Objective 1, Buildings Actions 1.A1-1.A4, 1.C1 and 1.E3-1.1.E4 (Pages 48-51) show how the Council will directly invest in energy efficiency improvements or encourage others to invest in such improvements. Again, these will boost local construction sector activity.</p>
Renewable Energy Generation	<p>The Fylde Coast benefits from an established skills and training centre for the renewable energy sector, the Lancashire Energy HQ, part of Blackpool and Fylde College, and located in the Blackpool Airport Enterprise Zone. Fylde Borough is also home to the nuclear facilities of Westinghouse, Springfield.</p> <p>The strongest local opportunities in this sector are focused in the Blackpool and Wyre Enterprise Zones. At the Hillhouse Enterprise Zone, out of a total of 22 plots comprising 61.62 ha of land, six plots (A, K1, K2, N, R and V1 totalling 18.34 ha) are primarily developed for, or proposed for, specialist energy generation infrastructure and facilities. At nearby Preesall, Halite Energy has consent for an underground gas storage project. Not all these projects will ultimately be realised but Hillhouse is increasingly establishing itself as a centre for such infrastructure, generating opportunities for related manufacturing, servicing and administrative support.</p> <p>Only a few other employment sites and Employment Areas on the Fylde Coast could realistically provide the land areas, separate from housing and other sensitive uses, for such large infrastructure projects. However, a growing trend is for industrial estates, business parks, large single businesses, etc. to generate a portion of their own power through local renewable sources. This provides construction and management opportunities for developing and operating such energy facilities, however, land allowances will need to be made, on or adjacent to, employment sites to provide space for the required infrastructure. This may impact on employment land take up rates.</p>	<p>Blackpool Climate Emergency Action Plan Actions 38-42, and 46 of Theme 4: Power and Heat (Pages 23-24), as well as Action 91 of Theme 9: Natural Environment, discuss options for delivering new and enhanced renewable energy options in Blackpool, particularly at Blackpool Airport Enterprise Zone but also linked to individual businesses or property schemes.</p> <p>Wyre Draft Climate Change Strategy Under Objective 4, Planning, Action 4.B4 (Page 66) will <i>“Review opportunities in Wyre to develop renewable energy schemes e.g., wind, solar and wave.”</i></p>

Sector Impacted	Fylde Coast Property Market/Land Need Opportunities	Links to Blackpool Climate Emergency Action Plan, 2021 and the Wyre Draft Climate Change Strategy 2024
Specialist IT/Consulting	<p>Investment into renewable energy (including offshore energy in the Irish Sea), carbon capture, climate modelling, building retrofit, amongst other topics, will generate opportunities in a diverse range of associated consulting and IT related sectors. Facilities such as Hillhouse and the training/skills opportunities of the Lancashire Energy HQ may draw businesses to the Fylde Coast, but to be sure of retaining them the sub-region will need a strong offer of high grade office premises.</p> <p>Consulting and IT firms are likely to be micro and small businesses, employing less than 50. As noted in Section 4.0, local office market demand is for high grade suites of sub 200 sqm each which are well located on main road corridors and with good public transport links. However, opportunities to deliver such space on the Fylde Coast are limited with a heavy dependence on the Knowledge Quarter scheme at Blackpool Airport Enterprise Zone to meet a broad range of future office requirements. In particular, the Knowledge Quarter is expected to offer data centre facilities while its position in relation to undersea international data cables, which come ashore on the Fylde Coast, offers some advantages for high speed data transmission. If delivered this scheme would be attractive to IT companies in a range of sectors.</p>	<p>Blackpool Climate Emergency Action Plan Ancillary uses which would support achieving the above mentioned actions.</p> <p>Wyre Draft Climate Change Strategy Ancillary uses which would support achieving the above mentioned actions.</p>
Advanced Manufacturing	<p>To maximise value from the growth of renewable energy, low carbon and related sectors, the Fylde Coast should seek to attract not just renewable energy/low carbon infrastructure but also the manufacturing industries that produce that infrastructure. It is important to recognise that many local authority areas, and sub-regions, are seeking to attract high grade 'green jobs' of this type so competition is strong. However, again the Fylde Coast has advantages including a growing green energy cluster at Hillhouse (which includes some manufacturing), training facilities, accessibility for offshore energy programmes and an established advanced manufacturing cluster at the Blackpool Airport Enterprise Zone with capacity for growth. In time, development at the Warton Enterprise Zone could deliver a further advanced manufacturing cluster to compete for green manufacturing. Such opportunities need to be marketed to green sectors and new build industrial schemes which will deliver high specification properties, competitive in advanced manufacturing markets encouraged.</p>	<p>Blackpool Climate Emergency Action Plan Ancillary uses which would support achieving the above mentioned actions.</p> <p>Wyre Draft Climate Change Strategy Ancillary uses which would support achieving the above mentioned actions.</p>
Agriculture	<p>Much of the change in the agricultural sector falls outside the scope of this study. But more uncertain agricultural markets may create opportunities for growth as well if they drive farmers to diversify their operations into other areas such as leisure or business accommodation. Fylde and Wyre are already home to a range of successful rural business schemes and further proposals for agricultural diversification, consistent with wider planning policy, should be encouraged.</p>	-

Source: BE Group, 2024

SUMMARY

3.136 Overall, the socioeconomic assessment has identified core trends that influence employment and the demand for employment land. SWOT analyses for each district are detailed below which will inform Chapter 8 of the Employment Land Review. The national and regional context forms a significant aspect of each district's future, and this includes the following:

- **Macroeconomic conditions:** The annual inflation rate has fallen to 3.25.6% as of March 2024 but still presents a challenge to consumers and businesses in the short to medium term. Continued interest rate rises and the onset of a nationwide recession could be accompanied by a sharp slowdown in investment.
- **Public spending:** A reduction in public funding for investment and regeneration projects across Blackpool, Fylde and Wyre could leave these areas vulnerable. In contrast, a commitment to further intervention would likely lead to improved socioeconomic outcomes.
- **Competition:** Competition with nearby urban centres such as Preston, Manchester and Liverpool presents a challenge for all three districts in attracting investment, employment and tourism.

3.137 As a whole, the Fylde Coast is expected to see modest growth which is forecast to continue into the medium and long term. Skill level improvements have been met with an increase in proportion of workers in high-value employment occupations, and a consequent increase in GVA. It is important that all three local authorities continue to monitor the changing demand for industry employment as a result of the ageing population, to ensure the supply of appropriately skilled labour aligns.

3.138 District specific strengths, weaknesses, opportunities and threats are outlined below:

Blackpool

Strengths

- **Employment Trends: Blackpool's** employment rate is on an upward trajectory, having increased by 5.6% since 2011 to 72.2% of the working population now in employment
- **Tourism:** Blackpool is a well-known traditional tourist destination within the UK, with a record nineteen million visitors to the town in the year 2021, contributing £1.4bn in output in 2021, while tourism in Blackpool accounted for almost 40% of all visits to Lancashire County in the same year.³⁸
- **Business Size:** Since 2011, the proportion of micro businesses has risen significantly, which could provide a hedge against unemployment during a macroeconomic downturn, with 87.9% of the 3,870 VAT and PAYE registered businesses at the micro level. This effect will be weakened if the businesses are still concentrated in one particular sector (e.g., accommodation and hospitality), but this trend still places Blackpool in a stronger economic position relative to where it was a decade ago.
- **Sector Dominance:** The Health Sector has shown substantial growth since 2011, with 53% of additional employment across the Fylde Coast attributable to Blackpool
- **Skills growth:** Blackpool has shown significant improvement in skills attainment since 2011, with a 7% increase in people attaining NVQ Level 4+ qualifications, which are expected to further increase by 2028.
- **Income growth:** Between 2011 and 2022, average earnings growth in Blackpool was in line with the England and North West averages and exceeded growth levels in Fylde and Wyre.

Weaknesses

- **Population Trends:** Blackpool's population continues to decline, with a 0.7% reduction since 2011 and 2021, albeit at a slower rate of decline than that noted across 1981-2010 (a 6.4% loss).
- **Unemployment:** The unemployment rates in Blackpool, while much reduced from their 2011 levels, are still above regional and national counterparts.

³⁸ <https://www.visitblackpool.com/latest-news/blackpool-s-post-pandemic-tourism-figures/#:~:text=The%20report%2C%20which%20evaluates%20the,in%20excess%20of%2020%2C000%20jobs>

- **Employment value:** Blackpool continues to suffer from low-value employment (e.g., hospitality, retail) compared to Fylde and Wyre, despite having seen an improvement in skills attainment since 2011. Blackpool has seen improvement in terms of occupational sectors, however, with sectors 1, 2 and 3 constituting 36% of total jobs in 2022 compared with 30% in 2011.
- **Migratory Patterns:** While migration out of Blackpool has slowed since 2011, outflows remain larger than inflows, with 70% of people migrating out of Blackpool being of working age population, indicating strong push factors outside the area, likely due to limited appropriate employment opportunities and appropriate housing stock.

Opportunities

- **Tourism:** Continued investment in tourism infrastructure in Blackpool to ensure that the area remains a viable and attractive destination for visitors both within and outside of the UK.
- **Employment Growth:** Overall employment across Blackpool is expected to grow by 3,993 jobs by 2042. The Health, Information Technology and Accommodation sectors are projected to experience the highest levels of employment growth across Blackpool between 2022 and 2042.
- **High Value Employment:** High value employment is forecast to rise, with Corporate Manager and Director employment expected to grow by 47% by 2042
- **Changing working patterns:** An increased tendency to work remotely, improvements to digital infrastructure and relatively lower property prices allows these areas to attract more high-quality, professional employment.

Threats

- **Brain drain:** Blackpool has been successful in raising education and skill levels over the last decade, but unless a sufficient number of high skill jobs are created, there is a risk of losing these workers to outward migration
- **Unemployment Trends:** Blackpool's unemployment rate has reduced by 4.5% since 2011 to 6.0%, but remains higher than the regional and national average (4.1% and 3.7% respectively)
- **Overreliance on public sector:** The high involvement of the public sector in Blackpool's economy leaves it particularly vulnerable to policy and funding changes.
- **Demographics:** The proportion of the population over 65 in each district already exceeds the national average and is set to grow significantly over the next 20 years.

This could lead to a relative decline in the labour supply and heightened pressure on public services.

3.139 Overall, Blackpool has seen substantial improvement across employment rate, skills attainment, and job growth by industry and sector since 2011. Notably, the health sector has provided a large-scale uplift to the GVA contributions of the local authority, while also providing high levels of employment. Forecasting indicates that this general trend of growth is set to continue, providing opportunities for Blackpool to continue to improve skill levels, while also continuing to develop its strengths in health and attracting high value IT and Construction jobs.

Fylde

Strengths

- **Income:** Fylde is a relatively high-income district. Average full-time earnings in Fylde were £32,812 in 2022, compared with £31,392 for the North West.
- **Education:** The proportion of the population with NVQ4 qualifications or equivalent in Fylde exceeds the regional and national averages, with 34.5% attaining this level versus 31.2% in the North West, and 33.8% in England.
- **Sector mix:** While Fylde has particular sector focuses (e.g., scientific and technical work), the area as a whole has a diverse range of sectors and consequently is less vulnerable to industry collapse.
- **Business Size:** Since 2011, the proportion of micro businesses has risen significantly, which could provide a hedge against unemployment during a macroeconomic downturn (88.4% of 3,330 registered businesses are at the micro level).
- **Employment:** Fylde has particularly low unemployment compared to the regional average, having reduced further since 2011 by 1.1% to a rate of 3.5%
- **Occupation Type:** Fylde's quantum of high value jobs is expected to rise significantly by 2042, with a 36% increase in Corporate Managers and Directors

Weaknesses

- **GVA growth:** Growth in total GVA for Fylde was 7.4% between 2011 and 2021, compared with 35% for both Blackpool and Wyre. This growth gap is not expected to close between now and 2042.

- **Employment Growth:** Compared to Wyre and Blackpool, Fylde's total employment is only expected to increase by 1,808 employees by 2024, however this is likely reflective of the size of the locality and location of urban employment areas
- **Over-reliance on Single Employer:** BAE Systems is a large employer in Fylde but its supply chain is not located within the district, leaving Fylde more dependent on this single company.

Opportunities

- **Tourism:** Continued investment in tourism infrastructure in Blackpool and the Fylde Coast to ensure that the area remains a viable and attractive destination for visitors both within and outside of the UK.
- **Employment Growth:** Health, Technology, Accommodation and Construction are projected to experience varying degrees of employment growth across the three boroughs between now and 2042.
- **Changing working patterns:** An increased tendency to work remotely, improvements to digital infrastructure and relatively lower property prices allows these areas to attract more high-quality, professional employment.

Threats

- **Demographics:** The proportion of the population over 65 in each district already exceeds the national average and is set to grow significantly over the next 20 years. This could lead to a relative decline in the labour supply and heightened pressure on public services. Similarly, the working age population across all three districts is projected to decline in absolute terms.
- **Decline in Manufacturing:** A 25% loss in manufacturing employment is expected in Fylde by 2042 as businesses move towards automation and white-collar work. The industry is set to continue to contribute significantly in terms of GVA, however.
- **Competition:** Competition with nearby urban centres such as Preston, Manchester and Liverpool for investment, employment and tourism.

3.140 Overall Fylde performs highly across a multitude of factors, with skills attainment and employment rates exceeding the North West and England averages. It is a relatively affluent area, however the ageing population is significant. It is anticipated that Fylde is expected to see a 56.5% increase in the over 65 age bracket, above regional and national averages of 36% and 44%. This poses the biggest threat to Fylde's economy and, as such,

future development and land use should consider this element and adapt future service provisions accordingly.

Wyre

Strengths

- **Population Growth:** Wyre has continued to show steady growth since 2011, with an anticipated steady population change of 10.3% (largely in line with regional and national growth) by 2042 – presenting predictability in demand and supply of labour
- **Education:** The proportion of the population with NVQ4 qualifications or equivalent in Wyre aligns with the regional and national average, with the number of people attaining NVQ Level 4+ qualifications having increased by 5.3% since 2011
- **Business Size:** Since 2011, the proportion of micro businesses has risen significantly (90% of Wyre's 4,095 registered businesses are at the micro level), which could provide a hedge against unemployment during a macroeconomic downturn.
- **Employment by occupation:** The proportion of workers classified as managers, directors and professionals has increased moderately since 2011, likely being in part due to the Hillhouse Enterprise Zone.

Weaknesses

- **Income growth:** Average full-time earnings growth across all three districts was lower than the North West average for the period 2011-2022.
- **Unemployment:** The unemployment rates in Wyre, while much reduced from their 2011 levels, are still above regional and national counterparts (5.3% versus 4.1% for the North West, and 3.7% for England).

Opportunities

- **Tourism:** Continued investment in tourism infrastructure in Blackpool and the Fylde Coast to ensure that the area remains a viable and attractive destination for visitors both within and outside of the UK.
- **Employment Growth:** Health, Technology, Accommodation and Construction are projected to experience varying degrees of employment growth across the three boroughs between now and 2042.
- **Changing working patterns:** An increased tendency to work remotely, improvements to digital infrastructure and relatively lower property prices allows these areas to attract more high-quality, professional employment.

Threats

- **Demographics:** The proportion of the population over 65 in each district already exceeds the national average and is set to grow significantly over the next 20 years. This could lead to a relative decline in the labour supply and heightened pressure on public services.
- **Remote:** There are arguably better transport connections (e.g., M55) available to the other nearby boroughs than to Wyre, and this may create a perception of remoteness that discourages workers and employers.

3.141 Overall, Wyre is on par with the wider North West in terms of population growth, employment rate, and skills levels. The Health Sector is particularly strong in Wyre, with GVA and employment growth further expected in the Construction and Hospitality sectors by 2042. Wyre's unemployment levels remain above regional and national averages.

4.0 PROPERTY MARKET ASSESSMENT

INTRODUCTION

- 4.1 This section provides a consideration of the demand for land and property in the Fylde Coast. The report first provides some brief comments on national and regional market trends which will impact on the local demand for land and premises. The local market is assessed through a quantitative review of property enquiries, deals done and the local supply of vacant premises alongside up to date market intelligence derived from consultations with developers, scheme managers and property agents.

NATIONAL AND REGIONAL PROPERTY MARKETS

- 4.2 Some brief comments on the wider market are provided below regarding the industrial, logistics and office sectors, along with the wider investment market.

Industrial/Warehouse Market

- At a nationwide level, 2022 was a tale of two halves, with record levels of take-up in the first half of the year giving way to what feels like a sharp decline in the second part of the year. However, notwithstanding a natural return to pre-Covid levels amplified by wider economic and political issues, year end take-up reached 4.46 million sqm (47.99 million sqft), making 2022 the third strongest year ever in terms of industrial warehouse take up. (Savills, 2023).
- Take-up in the North West reached 656,000 sqm (7.06 million sqft) in 2022 with 24 large transactions recorded. Demand has continued into 2023, particularly for prime stock. As of mid-2023 half the stock in the development pipeline (i.e., consented but not yet completed) was under offer, let or sold off plan (Savills - Big Shed Briefing, 2023).
- The supply of larger industrial and warehouse space has increased by a third over 2022, regionally or 314,000 sqm (3.38 million sqft) of new space across 16 units. However, using the three-year average annual take-up rate of 614,000 sqm/year (6.61 million sqft/year), this recent development equates to just half a year's worth of supply in the region. (Savills, 2023).
- The overall occupancy rate for the North West was around 94 percent, as of mid- 2023. Lower than in previous years, but still a limited offer for businesses in terms of the scale and types/tenures of stock available. The majority of this available space (77 percent) comprises second-hand, lower grade (grade B and C) units, while there remains a shortage of new, larger units available in the region (Knight Frank, 2023).

- Despite the macro-economic uncertainties of 2022, investment in industrial premises remained strong, with £900 million in industrial investments transacted in 2022, in the North West. While this figure was reduced on the 2021 rate of £1.30 billion, it was still ahead of the 5 year average of £868 million/year (B8 Real Estate, 2023).
- Focusing on the market for sub-9,000 sqm units, of most relevance to the Fylde Coast, development activity concentrated on the sub-1,500 sqm market with rents for high grade space reaching £10.00 per sqft (£108/sqm), even in the second hand market (B8 Real Estate, 2023).

Office Market

- Two years on from the end of the Covid-19 Pandemic and associated Lockdowns, office take up in the UK's main office market centres remains up to a third below wider averages, with considerable variation between sub-markets (Cushman and Wakefield, 2023). In 2022, office lettings and occupational sales in the North West totalled some 372,000 sqm (4 million sqft) around 80 percent of pre-pandemic levels. (EG Radius, 2023)
- In terms of larger office-based businesses, there is greater boardroom acceptance of remote-working/hybrid working while firms are increasingly exchanging quantity for quality in location decision-making. (Lambert Smith Hampton, 2022).
- In terms of varying working practices, the agility that serviced offices provide to occupiers has been a key advantage in the post-pandemic period. In an uncertain environment, occupiers have valued flexibility above almost anything else. The ability to expand, contract or terminate leases at relatively short notice has been highly beneficial to companies still developing their workplace strategies, and firms have been willing to pay a premium for this flexibility. (Lambert Smith Hampton, 2022)
- The rise of hybrid working has also caused the key features demanded by occupiers of serviced offices to change. Extra passes and memberships for staff, to allow the same space to be used by multiple different employees across the working week, are a key requirement. Other sought-after features that aid hybrid working include collaborative workspaces and soundproofed booths providing private spaces for phone and video calls. (Lambert Smith Hampton, 2022).
- In terms of quality, the North West is leading the 'flight to quality'; with occupiers consistently prioritising Grade A office space as it contributes towards their own sustainability goals.
- Data from EG Radius shows this shift to premium premises led average rents to reach £19.63/sqft (£211/sqm) or a quarter above the five-year average.

- Perhaps unsurprisingly, given rental growth, investment in the region’s office market (including from Real Estate Investment Trusts) remains buoyant. In 2022, buyers paid an average price of £215.69/sqft (£2,322/sqm), with an average net yield of 7.88 percent. The total value of deals in 2022 amounted to £448.8 million. (EG Radius, 2023).

PUBLIC SECTOR ENQUIRIES

- 4.3 All three of the respective local authorities have collected property enquiries information, through a mixture of telephone contacts with officers and online sources. This information is then collated and analysed using the Evolutive software programme. The Evolutive systems records the size and type of commercial property required for each enquiry received by the Council but, Evolutive floorspace data is either incomplete or includes exceptionally high figures which are difficult to interpret. Thus, the tables below examine the supplied data regarding property type only, although commentary is provided on the sizes of premises most commonly sought in the industrial and office markets.

Blackpool

- 4.4 Table 46 provides a year-by-year analysis of the number of enquiries for Blackpool, between 1st January 2006 and Summer 2023 (the period over which enquiries were recorded, consistent with other analyses of enquiries in Lancashire, including the Central Lancashire Employment Land study, 2021). Over this period, there were 1,973 property enquiries. Almost a quarter of enquiries were for industrial properties. 28.5 percent were for retail, 16.2 percent for offices and 12.4 percent for investment purchases, of any type. Other sectors saw only modest interest, most notably for this Study storage or trade units, for which only 28 enquiries were recorded over 17.5 years. Surprisingly, only 9.4 percent of the enquiries were for leisure and tourism properties, which will include hotels and holiday flats. This may not indicate an absence of demand for sectors which saw low levels of enquiries, however, rather that businesses are not enquiring for such property uses through the Councils.

Table 46 – Enquiries 2006-2023 Type – Blackpool

Year	Office ¹	Industrial ²	Storage ³	Retail ⁴	Land ⁵	Investment Purchase (Any Type)	Leisure / Tourism ⁶	Medical / Clinical	Total
2006	3	2	0	0	0	2	0	0	7
2007	26	9	1	32	3	42	5	0	118
2008	37	59	3	40	13	20	14	0	186
2009	25	52	5	39	7	14	10	3	155
2010	11	16	2	15	1	4	5	1	55
2011	33	32	0	48	9	19	19	0	160
2012	22	42	2	43	22	19	12	2	164
2013	17	40	0	55	17	13	12	1	155
2014	14	21	2	35	8	7	9	2	98
2015	23	29	2	58	7	13	17	2	151
2016	22	36	0	41	9	14	17	1	140
2017	24	38	5	30	19	14	14	2	146
2018	16	19	1	24	8	8	8	0	84
2019	13	20	2	20	3	8	10	0	76
2020	7	14	2	20	6	10	20	0	79
2021	10	13	0	30	10	12	8	2	85
2022	9	15	1	22	8	20	3	0	78
2023 (part)	7	7	0	11	3	6	2	0	36
Total (Percent)	319 (16.2)	464 (23.5)	28 (1.4)	563 (28.5)	153 (7.8)	245 (12.4)	185 (9.4)	16 (0.8)	1,973 (100.0)

Source: BBC, 2023

1. Office – includes Call Centre enquiries, which are recorded separately.
2. Industrial – includes Garages (not motor showrooms) which fall within industrial use class and are recorded separately.
3. Storage – includes Trade Units, which fall within B8 Use Class which are recorded separately.
4. Retail – includes Food Outlets which are separately recorded.
5. Land – includes those enquires listed as Yard.
6. Leisure and Tourism includes hotels and holiday flats.

4.5 Fewer organisations have been enquiring for premises, of all types, via the Council, since 2018, than was the case over 2006-2017. Pre-2018 there were notable reductions in enquiry rates in 2010, a recessionary year, although rates recovered well in 2011 and then remained high, with the partial exception of 2014, until 2018. Only a few enquiries were recorded in 2006 but the Council enquiry recording system was only commencing in that year.

- 4.6 In terms of more recent data, industrial and office enquiry rates saw some reduction in the pandemic year 2020, although other sectors saw little change and even some increases on 2019 (as was the case for leisure and tourism). Industrial apart, most sectors saw some improvement in 2021-2022 although the changes in annual enquiry numbers were modest.

Fylde

- 4.7 Table 47 provides a year-by-year analysis of the number of enquiries for Fylde, between 1st January 2006 and Summer 2023. Over this period, there were 906 property enquiries. Over a third of enquiries were for industrial properties, a higher proportion than in Blackpool. 21.2 percent were for retail, 14.2 percent for offices and 12.4 percent for investment purchases, of any type. Other sectors saw only modest interest, most notably for this Study storage or trade units, for which only seven enquiries were recorded over 17.5 years. Again, there were only a few for leisure and tourism properties, which will include hotels and holiday flats. This may not indicate an absence of demand for sectors which saw low levels of enquiries, however, rather that businesses are not enquiring for such property uses through the Councils.

Table 47 – Enquiries 2006-2023 Type – Fylde

Year	Office ¹	Industrial ²	Storage ³	Retail ⁴	Land ⁵	Investment Purchase (Any Type)	Leisure / Tourism ⁶	Medical / Clinical	Total
2006	0	0	0	0	0	0	0	0	0
2007	1	2	1	1	0	0	0	0	5
2008	9	15	1	6	5	2	1	0	39
2009	2	4	0	3	0	2	0	0	11
2010	5	15	0	8	3	5	3	0	39
2011	17	26	0	14	4	5	2	0	68
2012	15	31	1	16	15	6	4	0	88
2013	9	26	0	18	16	10	0	0	79
2014	4	27	0	7	10	3	0	0	51
2015	11	25	1	29	8	5	5	1	85
2016	12	31	0	17	7	7	4	0	78
2017	17	26	3	10	9	14	1	0	80
2018	12	19	0	10	2	2	2	0	47
2019	4	13	0	7	4	7	0	0	35
2020	4	13	0	9	4	15	4	0	49
2021	3	21	0	16	12	16	1	0	69
2022	3	20	0	13	7	7	2	0	52
2023 (part)	4	10	0	8	3	5	1	0	31
Total (Percent)	132 (14.6)	324 (35.8)	7 (0.8)	192 (21.2)	109 (12.0)	111 (12.3)	30 (3.3)	1 (0.1)	906 (100.0)

Source: BBC, 2023

1. Office – includes Call Centre enquiries, which are recorded separately.
2. Industrial – includes Garages (not motor showrooms) which fall within industrial use class and are recorded separately.
3. Storage – includes Trade Units, which fall within B8 Use Class which are recorded separately.
4. Retail – includes Food Outlets which are separately recorded.
5. Land – includes those enquires listed as Yard.
6. Leisure and Tourism includes hotels and holiday flats.

4.8 Fewer organisations have been enquiring for premises, of all types, via the Councils, since 2018, than was the case over 2006-2017, although the reduction in enquiry numbers was less extreme than can be observed in Blackpool. The period 2011-2017 saw the highest enquiry rates. This was a period of national economic recovery from recession and growth.

4.9 Unlike in Blackpool there was no particular reduction in enquiry rates in 2020, while 2021-2022 saw some of the best enquiry rates of recent years. It should also be noted that interest in offices has been negligible, in Fylde, since 2019.

Wyre

4.10 Table 48 provides a year-by-year analysis of the number of enquiries for Wyre, between 1st January 2006 and Summer 2023. Over this period, there were 888 property enquiries. The split of enquiries received, by use, is similar to that seen in Fylde and it is likely that many businesses enquiring for space in Wyre also enquired about Fylde as well.

Table 48 – Enquiries 2006-2023 Type – Wyre

Year	Office ¹	Industrial ²	Storage ³	Retail ⁴	Land ⁵	Investment Purchase (Any Type)	Leisure / Tourism ⁶	Medical / Clinical	Total
2006	0	0	0	0	0	0	0	0	0
2007	0	3	0	1	0	0	0	0	4
2008	3	5	0	2	0	2	0	2	14
2009	1	2	0	0	0	1	0	0	4
2010	6	12	0	5	2	4	3	0	32
2011	19	32	0	14	6	3	3	0	77
2012	16	42	1	19	17	9	5	0	109
2013	13	36	1	16	18	10	1	0	95
2014	6	25	0	14	10	1	1	0	57
2015	8	22	1	24	8	6	6	1	76
2016	8	27	1	17	7	8	5	0	73
2017	13	36	3	10	7	14	4	0	87
2018	10	12	0	12	4	4	1	0	43
2019	6	14	0	8	5	11	0	0	44
2020	5	12	0	8	4	13	4	0	46
2021	5	13	0	12	9	10	1	0	50
2022	4	17	0	12	8	9	0	0	50
2023 (part)	5	7	0	5	3	7	0	0	27
Total (Percent)	128 (14.4)	317 (35.7)	7 (0.8)	179 (20.2)	108 (12.2)	112 (12.6)	34 (3.8)	3 (0.3)	888

Source: BBC, 2023

1. Office – includes Call Centre enquiries, which are recorded separately.
2. Industrial – includes Garages (not motor showrooms) which fall within industrial use class and are recorded separately.
3. Storage – includes Trade Units, which fall within B8 Use Class which are recorded separately.

4. *Retail – includes Food Outlets which are separately recorded.*
5. *Land – includes those enquires listed as Yard.*
6. *Leisure and Tourism includes hotels and holiday flats.*

- 4.11 Over a third of enquiries were for industrial properties. 20.2 percent were for retail, 14.4 percent for offices and 12.6 percent for investment purchases, of any type. Other sectors saw only modest interest, most notably for this Study storage or trade units, for which only seven enquiries were recorded over 17.5 years. Again, there were only a few for leisure and tourism properties, which will include hotels and holiday flats. This may not indicate an absence of demand for sectors which saw low levels of enquiries, however, rather that businesses are not enquiring for such property uses through the Councils.
- 4.12 As elsewhere, fewer organisations have been enquiring for premises, of all types, via the Councils, since 2018, than was the case over 2006-2017. The period 2011-2017 saw the highest enquiry rates. This was a period of national economic recovery from recession and growth.
- 4.13 As in Fylde there was no particular reduction in enquiry rates in 2020, while 2021-2022 saw some of the best enquiry rates of recent years. It should also be noted that interest in offices has been negligible in Wyre since 2019.

Fylde Coast Enquiries by Size Range

- 4.14 As noted, total floorspace figures are difficult to analyse but, across the Fylde Coast, most of those enquiring for industrial units sought premises of sub-300 sqm each or greater than 1,000 sqm each, with a gap in interest in between. This trend was also true for storage units. It is likely that those enquiring for very large space had an area of search greater than the Fylde Coast, extending across Lancashire.
- 4.15 Three quarters of those enquiring for office space sought suites of less than 300 sqm. Of this, 46.4 percent were for less than 100 sqm. Only nine enquiries for office premises of 2,500 sqm or greater were recorded in the period.
- 4.16 For retail, leisure and tourism units the interest was for properties of less than 100 sqm each. Meaningful size data for other uses is not available.

PROPERTY TRANSACTIONS

4.17 Transactional information has been sourced from Radius Data Exchange property database for industrial units and offices, which have been sold or let in the Fylde Coast in the last ten years. Transactional data provides evidence of trends, popular locations, along with prime rents which have been achieved in the area.

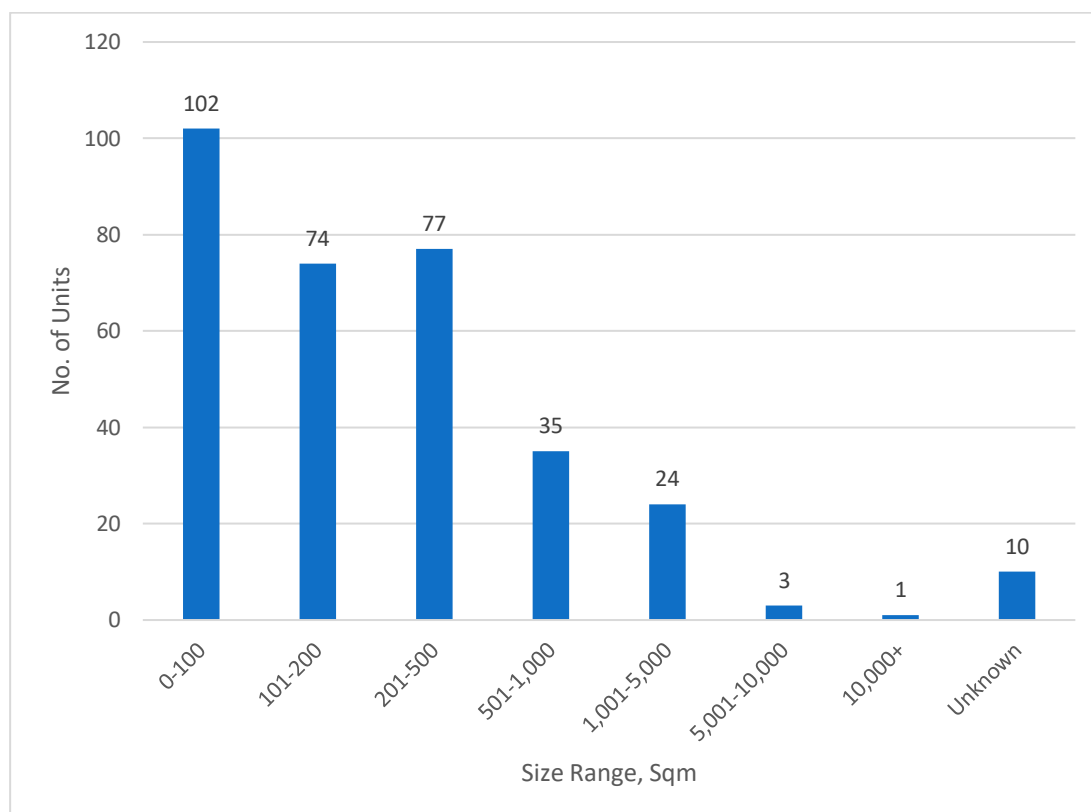
Industrial Transactions

Blackpool

4.18 Over the last ten years, 326 industrial deals have been recorded within Blackpool, of which a total of 157,184 sqm of floorspace has been transacted. A breakdown by size band can be seen in Figure 18 below. On average over the last ten years, 33 deals and around 15,700 sqm of floorspace have been transacted annually. Some key market trends include:

- Over three quarters of the transactions were for units of sub-500 sqm in size, with just under a third (102) being for units of 100 sqm or less.
- Transactions for units of 501-5,000 sqm each were infrequent but did occur with 59 recorded over the decade, an average of 6 per year.
- Only four deals for units of greater than 5,000 sqm, and only one for more than 10,000 sqm (premises on Clifton Road in 2015, a freehold sale. Further details confidential), were recorded although properties of this size will only rarely become available anywhere on the Fylde Coast.
- 2018 saw the highest number of deals occur within a single year, 52, 16.0 percent of the total for the decade.
- However, over 2021-2023 there have been just 17 industrial transactions recorded in Blackpool accounting for 18,861 sqm, or 12.0 percent of the decade's total deals. This may reflect weakened demand post the Covid-19 Pandemic and subsequent macro-economic issues. However, reflecting property agent comments, discussed below, it appears to reflect a lack of supply, of all sizes, to meet demand.
- 77.0 percent of the transactions were leasehold with an average achieved rent of £5.00/sqft (£53.82/sqm). This rental level was slightly higher than the averages for Fylde and Wyre, as noted below, at £4.46/sqft (£48/sqm) each.

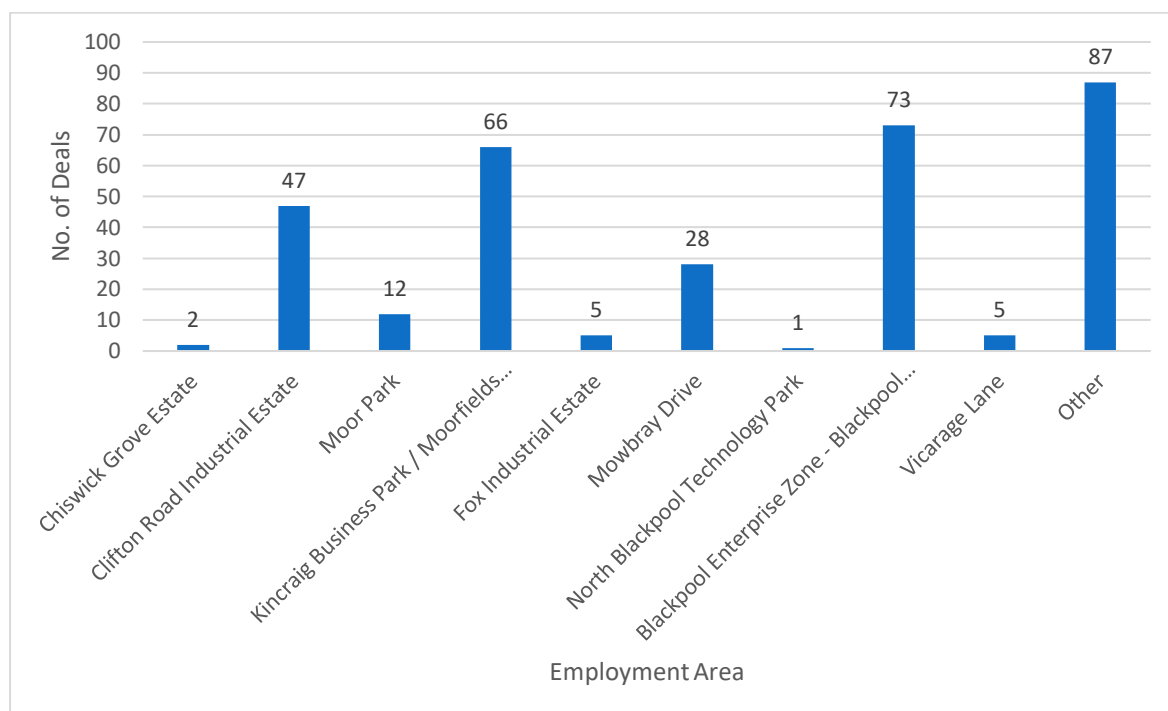
Figure 18 – Industrial Transactions by Size, 2013-2023 – Blackpool



Source: Radius Data Exchange, 2023

- 4.19 Figure 19 divides the 326 recorded transactions by the nine main multi-occupancy industrial estates of Blackpool. Of these, the Blackpool Airport Enterprise Zone, primarily Blackpool Business Park and Squires Gate Industrial Estate, was most active with 73 recorded transactions or 22.4 percent of the total. At Squires Gate Industrial Estate, most transactions were for units of 100-200 sqm each, achieving rents of £4-5/sqft (£43-54/sqm), indicative of average quality accommodation. At Blackpool Business Park, the average leasehold deal was for 70-800 sqm of space each, achieving £5-8/sqft (£54-86/sqm), with a best rent of £8.12/sqft (£87/sqm) achieved in 2021 for a unit of 84 sqm. Perhaps unsurprisingly, given the modern offer of space at Blackpool Business Park, these are amongst the highest industrial rents in Blackpool over the decade.
- 4.20 Blackpool Business Park has also been the main source of freehold and long leasehold deals in Blackpool since 2013, with 29 recorded. Smaller transactions were for units of 75 sqm achieving around £143/sqft (£1,539/sqm). Larger deals were for units of 125-1,350 sqm each achieving £63-100/sqft (£678-1,076/sqm).

Figure 19 – Industrial Transactions by Employment Area – Blackpool³⁹



Source: Radius Data Exchange, 2023

- 4.21 Kinraig Business Park / Moorfields Estate was the second most active location, with 66 deals or 20.2 percent of the total. Deals here were for units of 500-1,000 sqm each. Perhaps surprisingly, the modern accommodation of Kinraig Road achieved rents equal to, and sometimes exceeding those of Blackpool Business Park with a range of £5-11/sqft (£54-118/sqm) and an average of £7.10/sqft (£76/sqm). The highest rent achieved anywhere in Blackpool was Unit 2c, Kinraig Business Park, Kinraig Court. This smaller 139 sqm unit achieved £11.33/sqft (£122.0/sqm). 38 freehold deals were also recorded here, generally for smaller units of 0-400 sqm each. Achieved sale prices varied considerably though.
- 4.22 Clifton Road Industrial Estate saw 47 transactions over the decade, 14.4 percent of the total. Transactions here were generally for units of 150-700 sqm each, achieving £3-7/sqft (£32-75/sqm) with a best rent of £7.52/sqft (£81/sqm) achieved in 2013 for a 105 sqm unit.
- 4.23 Activity in the other Employment Areas was modest by comparison. 87 transactions categorised as 'Other' fell outside of the Employment Areas. These generally comprised

³⁹ Fox Industrial Estate is identified as part of Mowbray Drive in Policy DM7: 'Provision of Employment Land and Existing Employment Sites' of Blackpool Local Plan Part 2: Site Allocations and Development Management Policies (2021).

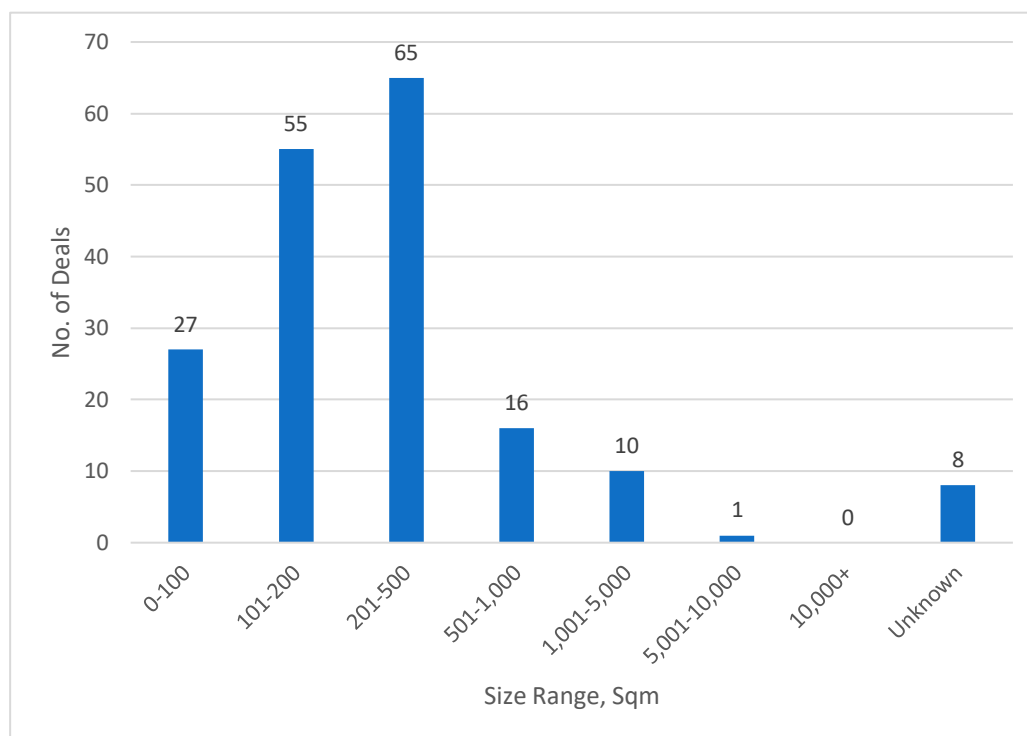
units of up to 600 sqm each in backland industrial locations, within the mostly residential areas of Inner Blackpool (the FY1 postcode area). This lower grade space achieved rents of £3-5/sqft (£32-54/sqm).

Fylde

4.24 Over the last ten years 182 industrial deals have been recorded within Fylde, of which a total of 65,547 sqm of floorspace has been transacted. A breakdown by size band can be seen in Figure 20 below. On average over the last ten years, 18 deals and around 6,600 sqm of floorspace have been transacted annually. Some key trends include:

- Units of less than 500 sqm accounted for 80.8 percent of all transactions. There were only 11 deals for units of over 500 sqm in size.
- Properties of 201-500 sqm represented the highest number of deals, accounting for just over a third of the total during the time frame, or 65 deals. This was followed by 55 deals occurring of 101-200 sqm. This shows the strength of the local market for small to mid-sized units.
- Only one deal for more than 5,000 sqm of space was recorded. This premises was located at Queensway Industrial Estate, Everest Road, Lytham St Annes. The 5,713 sqm unit achieved £1.79/sqft (£19/sqm) on a ten year lease.
- 2015 saw the highest number of deals occur within a single year, 28, 15.4 percent of the total for the decade. This was followed by 25 deals occurring in 2018. There has been a noticeable downturn in the number of deals which have taken place in the years 2021, 2022 and 2023 to date, with just nine deals recorded.
- Of the transactions, the majority, 86.3 percent, were leasehold. The average rent in Fylde, over the decade was £4.64/sqft (£49.95/sqm).

Figure 20 – Industrial Transactions by Size, 2013-2023 – Fylde

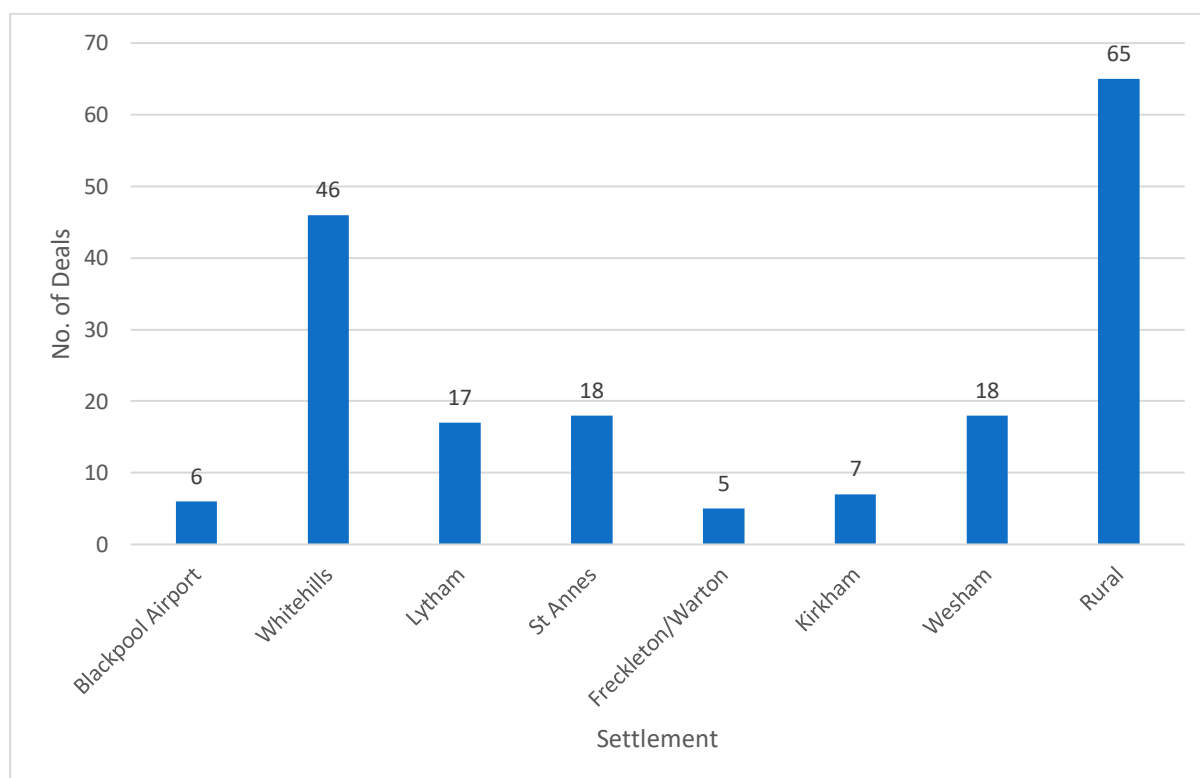


Source: Radius Data Exchange, 2023

- 4.25 Figure 21 divides the 182 recorded deals by settlement. It shows that, the wider rural area aside, Whitehills (comprising Whitehills Park and Blackpool and Fylde Industrial Estate) was the most active location with 46 recorded deals around a quarter of the total. This is unsurprising as, as will be shown in Section 7.0, Whitehills is also the focus of past and present development activity, reflecting its strong position on the M55 Corridor. Market activity here is for units of 50-800 sqm each. Achieved rents here are a reasonable £6-8/sqft (£65-86/sqm), suggesting average-good quality space, with a best rent of £8.71/sqft (£94/sqm) achieved in 2013 for a 320 sqm unit. Whitehills is also the focus of much of the local freehold market activity although sale prices are generally not stated in the available data.
- 4.26 Just over a third of the deals, 65, were in the ‘Rural’ area of Fylde, with a focus on Peel Hall Industrial Estate in the west and Clifton Business Park in the east. In both locations, deals were for units of sub-250 sqm each. Achieved rents were £5-6/sqft (£54-65/sqm), again reasonable for second hand stock.
- 4.27 In terms of the other settlements:
- Lytham – Deals focused in the industrial estates in the east of the town, for units of sub-300 sqm each. Achieved rents were £5-6/sqft (£54-65/sqm).

- St Annes – Queensway Industrial Estate is the focus for activity here, for units of 100-700 sqm each. Achieved rents were £4-6/sqft (£43-65/sqm).
- Kirkham/Wesham – Active locations include Bradkirk Business Park, Weeton Road, Wesham and Kirkham Trade Park, mostly for sub 400 sqm units. Achieved rents were £4-6/sqft (£43-65/sqm).
- Freckleton/Warton – With few Employment Areas in this location, excluding BAE Warton which does not offer local business space, it is unsurprising that only five deals were recorded here. Freckleton Enterprise Park, Bush Lane was the only active location, for units of sub 250 sqm each. Achieved rents were £4/sqft (£43/sqm) on average.
- Deals at Blackpool Airport were for hangar space and distinct from accommodation elsewhere.

Figure 21 – Industrial Transactions by Settlement – Fylde



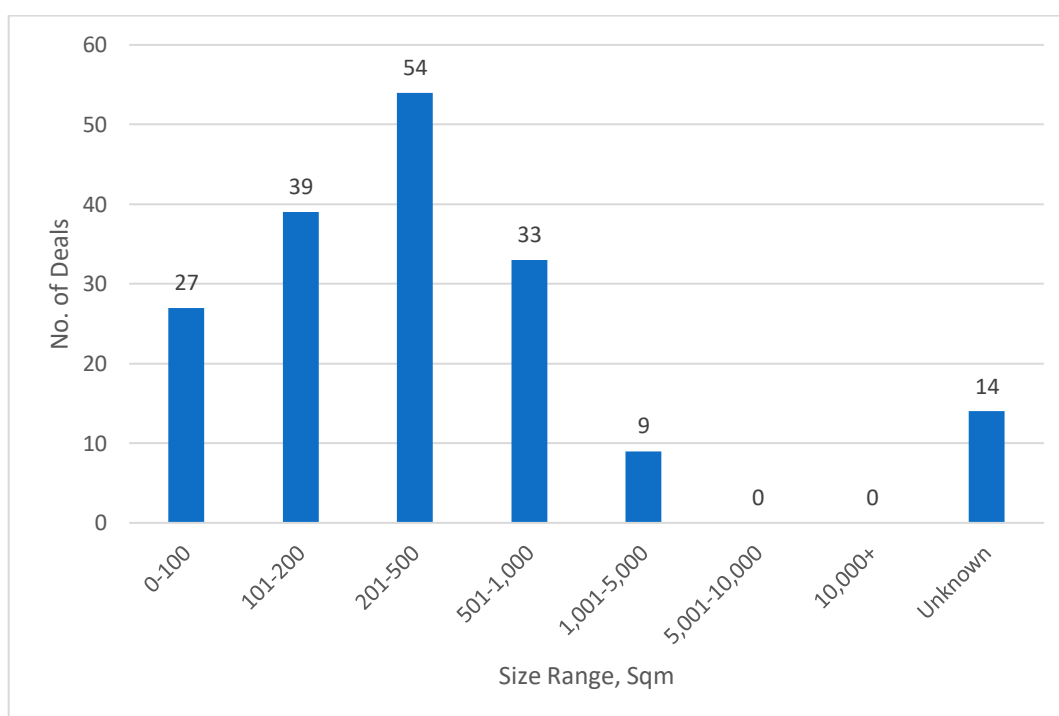
Source: Radius Data Exchange, 2023

Wyre

4.28 Over the last ten years 176 industrial deals have been recorded within Wyre, of which a total of 61,580 sqm of floorspace has been transacted. A breakdown by size band can be seen in Figure 22 below. On average over the last ten years, 18 deals and around 6,200 sqm of floorspace have been transacted annually. The key trends are:

- Units of under 500 sqm accounted for 68.2 percent of all transactions, with properties of 201-500 sqm dominating again showing a market focused on small to mid-sized premises.
- There were no deals for units over 5,000 sqm.
- 2016 saw the highest number of deals occur within a single year, 32, 18.2 percent of the total for the decade. 2017 saw the next highest number of deals in a single year with 24.
- Since January 2020 there has been just 10 transactions completed accounting for 5,420 sqm of floorspace. This may reflect weakening market demand but could also reflect a more limited local supply for businesses to take up.
- Two third of the deals were leasehold, with an average achieved rent of £4.46/sqft (£48/sqm).

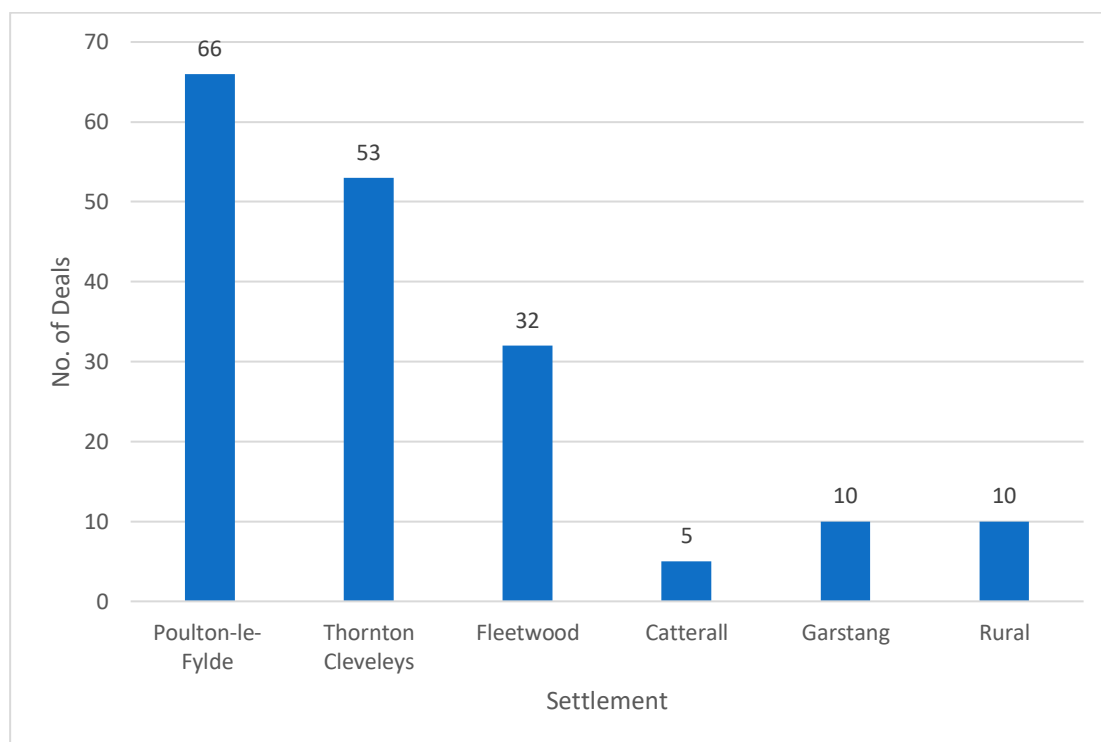
Figure 22 – Industrial Transactions by Size, 2013-2023 – Wyre



Source: Radius Data Exchange, 2023

4.29 Figure 23 divides the 176 transactions of Wyre by settlement. It shows that the majority of deals, 119 or two thirds of the total, occurred in Poulton-le-Fylde or Thornton Cleveleys. This is unsurprising as most of the largest industrial estates fall into these settlements, including the substantial Poulton Industrial Estate which is discussed further in Section 7.0.

Figure 23 – Industrial Transactions by Settlement – Wyre



Source: Radius Data Exchange, 2023

- 4.30 At Poulton Industrial Estate, most deals were for sub 700 sqm units. Achieved rents were £4-6/sqft (£43-65/sqm), with a best rent of £8.67/sqft (£93/sqm) achieved for a small, 70 sqm unit, in 2016. Freehold values vary, but average around £54/sqft (£584/sqm) for sub-300 sqm units of second hand space.
- 4.31 Deals in Thornton Cleveleys are focused on Red Marsh Industrial Estate, Thornton for sub 400 sqm units. Rents here are a reasonable £4-7/sqft (£43-75/sqm), with a best rent of £10.86/sqft (£117sqm) recorded for a 145 sqm unit in 2019. Freehold deals are also for sub 400 sqm units, but achieved prices vary considerably.
- 4.32 Fleetwood saw 32 deals or 18.2 percent of the total, almost all at Copse Road Industrial Estate. Average rents are £3-5/sqft (£32-54/sqm) here, with a best rent of £10.15/sqft (£109 sqm) recorded for a 604 sqm unit in 2020. Only a small number of freehold deals were reported here, with price data generally not disclosed.
- 4.33 Market activity on the A6 corridor and in the rural area, particularly when compared to Fylde, has been modest and generally for sub 500 sqm units, let for rents of less than £5/sqft (£54/sqm) in a diverse number of Employment Areas.

Overall Trends

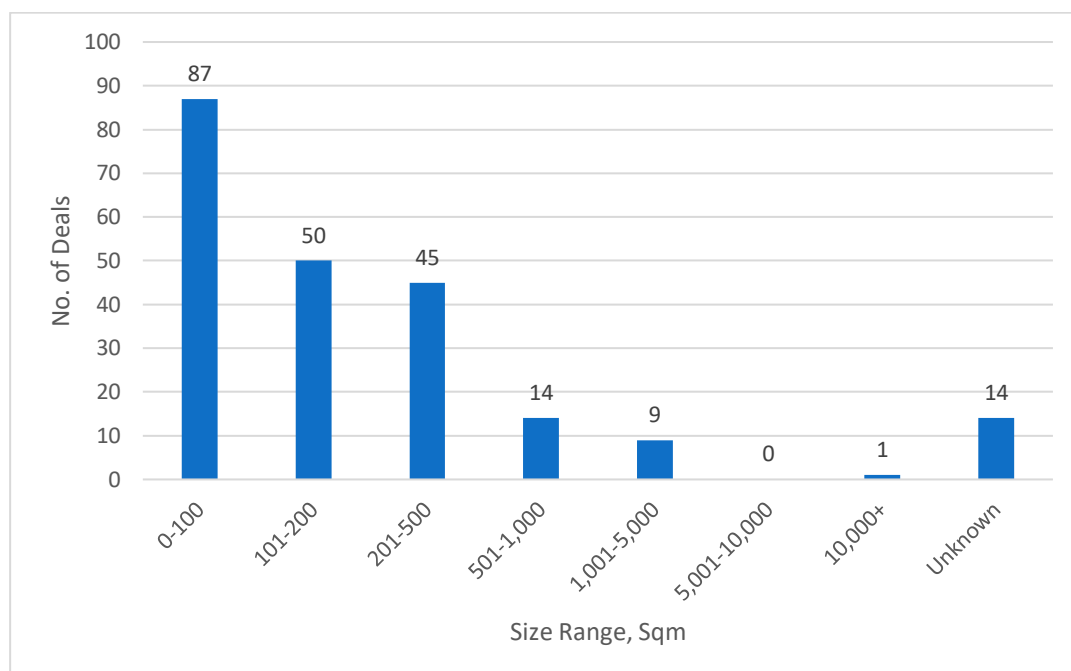
- 4.34 Across the Fylde Coast, the vast majority of market activity is for sub 500 sqm units. This is unsurprising as 88-90 percent of all local businesses in Blackpool, Fylde and Wyre are micro firms, employing less than ten staff (see Section 3.0), which will only generate small property requirements.
- 4.35 Units of 500-5,000 sqm see transactions occasionally while market activity for units above 5,000 sqm, in size, is negligible. The question to be determined is whether this reflects a lack of demand for larger units, or a lack of supply for businesses to take up. Since 2020 there has been a notable reduction in transaction rates, something considered in Section 10.0 Conclusions. Around a third to 86 percent of deals were leasehold, with Wyre having the largest freehold market.
- 4.36 The most active locations, in terms of market transactions include the Blackpool Airport Enterprise Zone and Kincaig Business Park / Moorfields Estate in Blackpool, Whitehills in Fylde and the industrial estates of Thornton Cleveleys and Poulton-le-Fylde in Wyre. Average rents are £4-6/sqft (£43-65/sqm), extending to £8/sqft (£86/sqm) at prime locations. These rental levels suggest that the Fylde Coast does not have a significant problem with lower grade industrial stock.

Office Transactions

Blackpool

- 4.37 Within the last ten years in Blackpool, 220 office deals have transacted, totalling 72,939 sqm of office floorspace. On average over the last ten years, 22 deals and around 7,300 sqm of floorspace have been transacted annually. Figure 24 shows a breakdown by size band. The key trends are:
- Unsurprisingly most details were for smaller suites, with units under 500 sqm accounting for 82.7 percent of transactions. In particular, units of 100 sqm or less accounted for 39.5 percent of all transactions.
 - 2014 saw the highest number of deals complete with 41, accounting for 18.6 percent of the total.
 - Since 2020 only 6-7 deals/year were recorded.
 - 167 (75.9 percent) of the deals were leasehold transactions. The average rent achieved for offices with pricing information available was £7.04/sqft (£76/sqm).

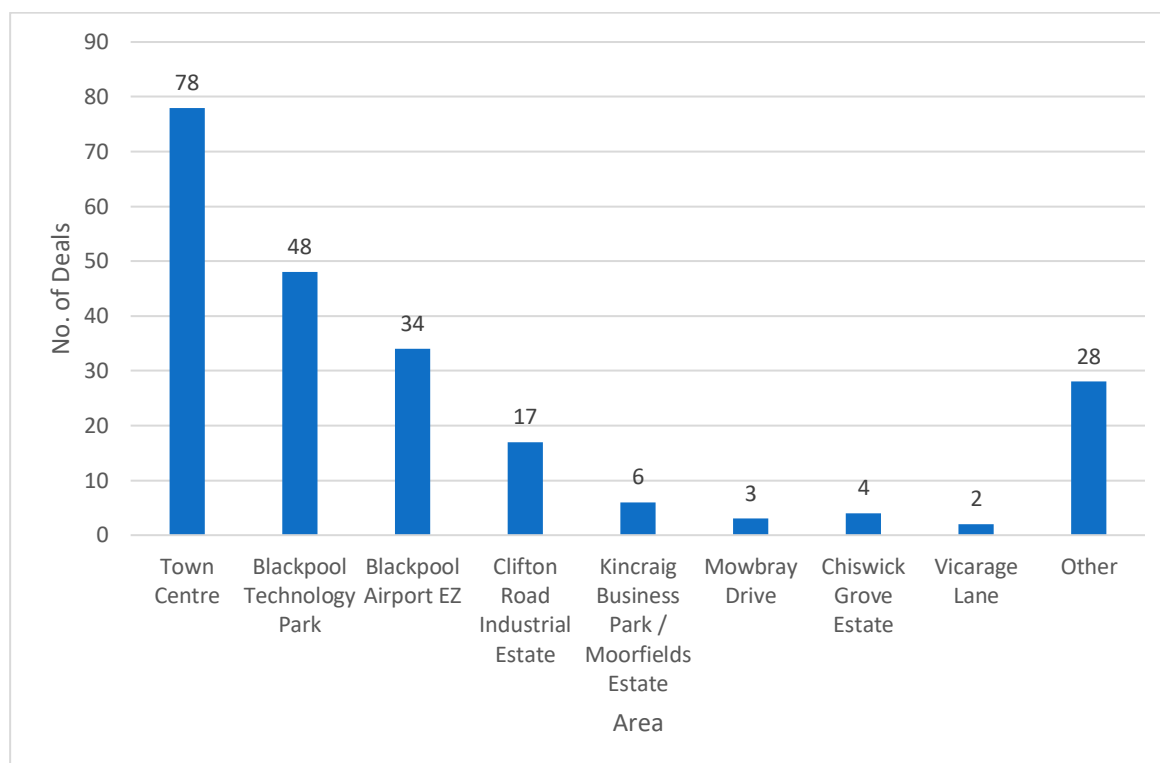
Figure 24 – Office Transactions by Size, 2013-2023 – Blackpool



Source: Radius Data Exchange, 2023

4.38 Figure 25 splits the 220 office deals by sub area. Perhaps unsurprisingly nearly half the transactions, 106 occurred in stock outside of the Employment Areas. Most of these 106, nearly three quarters or 78, occurred in, or on the edge of, Blackpool Town Centre. Deals in the Town Centre were mostly for sub 500 sqm suites in multi-occupancy properties, but individual deals for whole buildings of up to 2,000 sqm each were recorded. The deals cover a diverse range of town centre streets. Achieved rents vary, but the dominant range was £5-11/sqft (£54-118/sqm), with an average rent of £6.65/sqft (£72/sqm). This suggests mostly average quality or ‘Grade B’ stock. Such stock is usable, albeit including individual units which may be poor in nature.

Figure 25 – Office Transactions by Area – Blackpool



Source: Radius Data Exchange, 2023

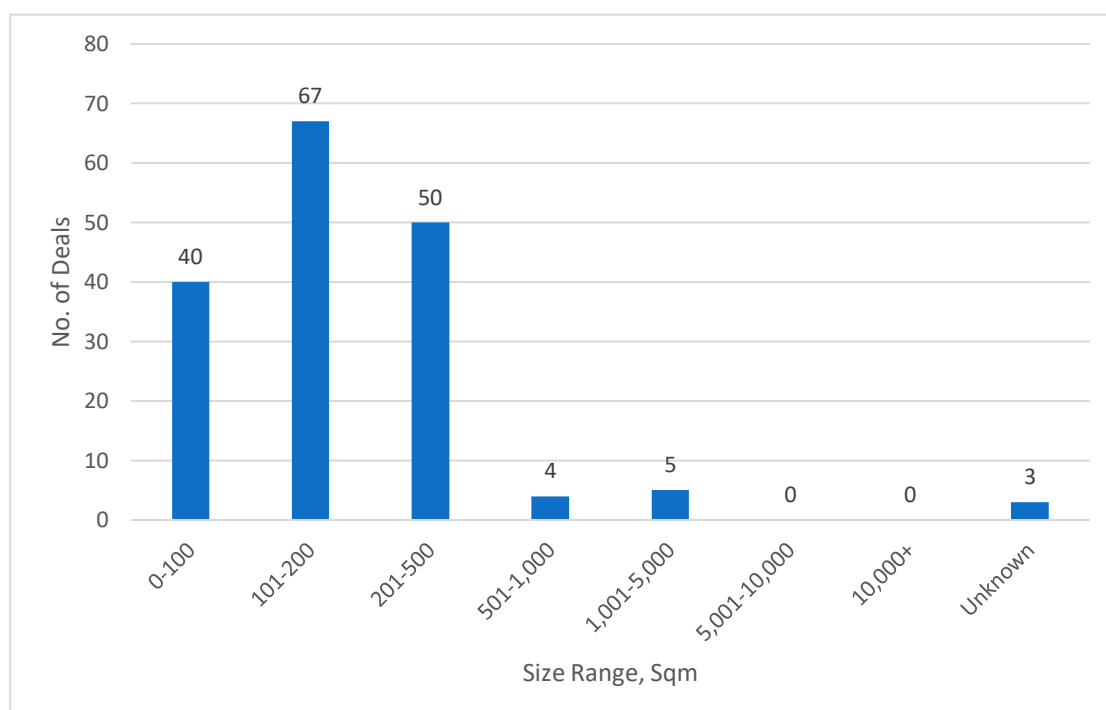
- 4.39 Best rents of £14.50/sqft (£156/sqm) were recorded for the letting of a 1,997 sqm property at Bickerstaffe Square, Talbot Road in 2018. This new build property, part of Talbot Gateway, was one of the few high grade ‘Grade A’ properties in the Town Centre. It also had Blackpool Council as an anchor tenant. Freehold sale prices in the Town Centre varies considerably.
- 4.40 Outside of the Town Centre, Blackpool Technology Park is the second most active location. Deals mostly occurred in the multi-let offices of Hawking Place and in the Blackpool Technology Management Centre, Faraday Way. Deals here were for sub 300 sqm units with rents of £5-10/sqft (£54-108/sqm) achieved. Again, such rents suggest average quality stock.
- 4.41 The third most active location was Blackpool Airport Enterprise Zone and Blackpool Business Park. Deals here were for sub 300 sqm units. Rents here were £6-8/sqft (£65-86/sqm), again at average levels.

Fylde

4.42 Within the last ten years in Fylde, 169 office deals have transacted totalling 40,681 sqm of office floorspace. On average over the last ten years, 17 deals and around 4,100 sqm of floorspace have been transacted annually. Figure 26 shows a breakdown by size band. The key trends are:

- Unsurprisingly units of a small size were most popular. Units under 500 sqm accounted for 92.9 percent of all transactions. In particular, units of 101-200 sqm accounted for 39.6 percent of all transactions
- The largest premises to transact was Discovery House, Brooklands Way, Whitehills Business Park in 2019. This 2,351 sqm unit was leased for £9.88/sqft (£106.35/sqm)
- 2017 saw the highest number of deals complete in a single year with 26, accounting for 15.4 percent of the total.
- Since the start of 2020, only 18 deals have transacted, accounting for 10.7 percent of deals within the last ten years
- Of the 169 office deals to complete in the last ten years, 139 (82.2 percent) were leasehold transactions. The average achieved rent for all offices with price information available was £8.00/sqft (£86.11/sqm).

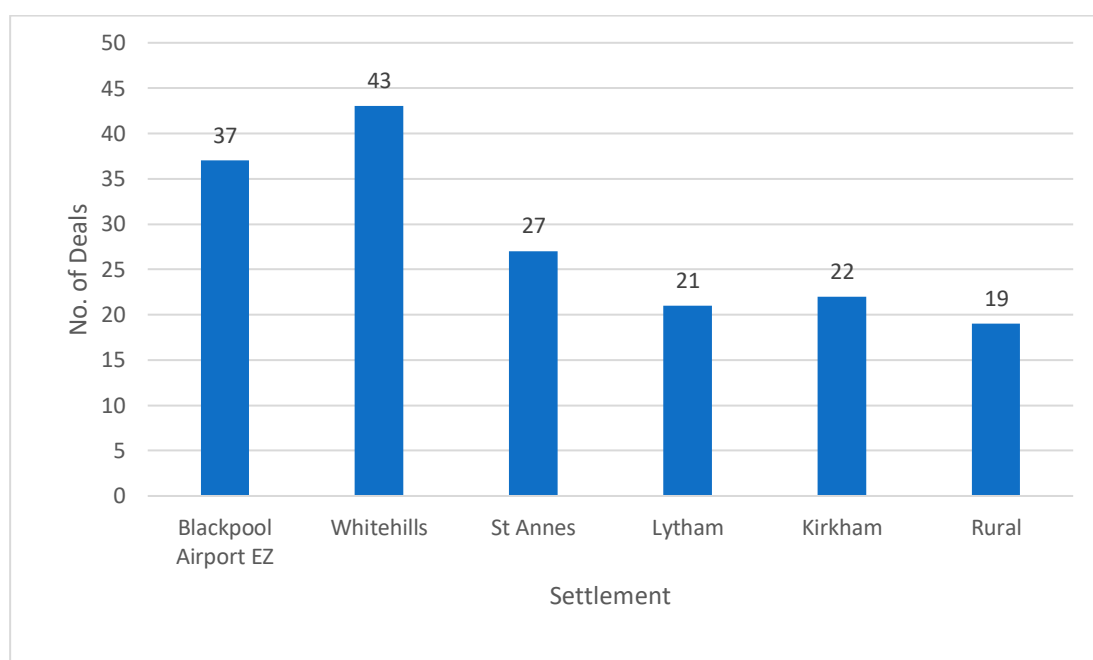
Figure 26 – Office Transactions by Size, 2013-2023 – Fylde



Source: Radius Data Exchange, 2023

- 4.43 Figure 27 splits up the 169 office transactions by settlement. In terms of numbers of deals, Whitehills (primarily Whitehills Park) dominated with 43 or around a quarter of the total. Most deals here were lettings of suites of 100-250 sqm each mostly on Neptune Court and Croft Court. Average rents were £6-10/sqft (£65-108/sqm), reasonable although not exceptional, with a best rent of £13.22/sqft (£142/sqm) reported for a small suite of 70 sqm in 2013. Whitehills Park was also a focus for freehold transactions with suites sub 300 sqm each selling for £110-120/sqft (£1,184-1,292/sqm).
- 4.44 At Blackpool Airport Enterprise Zone, Blackpool Business Park was another focus of office market activity, accounting for 21.9 percent of the deals. Transactions were for sub 400 sqm suites. Average rents were £5-9/sqft (£54-97/sqm), with a best rent of £13/sqft (£140/sqm) reported for a small suite of 304 sqm in 2020.
- 4.45 In St Annes, office market activity was focused in the town centre, mostly for suites of sub 300 sqm each achieving rents of £7-13/sqft (£75-140/sqm). The best rent achieved was of £13.22/sqft (£142/sqm), reported for a small suite of 24 sqm, on Orchard Road in 2013.

Figure 27 – Office Transactions by Settlement – Fylde



Source: Radius Data Exchange, 2023

- 4.46 In Lytham, transacted properties were spread throughout the town, with most deals for suites of less than 200 sqm each. Achieved rents average £10-12/sqft (£108-129/sqm). Some small offices at Jubilee House, of less than 20 sqm each achieved rents of £25/sqft (£269/sqm) although that likely includes a service charge.

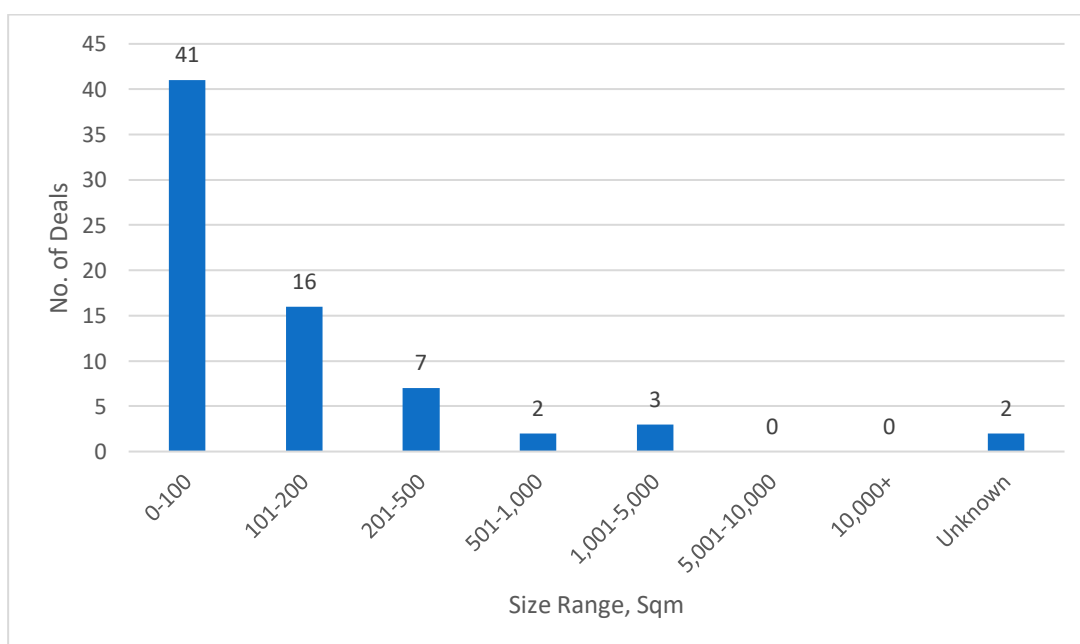
4.47 In Kirkham, transactions focused at St Georges Park, for suites of sub 200 sqm each. Achieved rents were £6-8/sqft (£65-86/sqm). Transactions in the rural area were limited and spread across multiple Employment Areas for second hand space. This suggests the rural market in Fylde is strongly industrial (and storage) in character.

Wyre

4.48 Within the last ten years in Wyre, 71 office deals have transacted totalling 13,823 sqm of office floorspace. On average over the last ten years, seven deals have completed each year, equivalent to around 1,400 sqm of floorspace per year. Figure 28 shows a breakdown by size band. The key trends are:

- Unsurprisingly smaller units were most popular. Units under 500 sqm accounted for 90.1 percent of transactions. In particular units of under 100 sqm accounted for 57.7 percent of all transactions, the strongest size band over the past ten years
- 2016 saw the highest number of deals complete with 16, accounting for 22.5 percent of the total. No other year saw ten or more deals take place
- Since the start of 2020, only six deals have transacted, accounting for 8.5 percent of deals within the last ten years
- Of the 71 office deals to complete in the last ten years, 59 (83.1 percent) were leasehold transactions. The average rent of all the offices with pricing information was £9.00/sqft (£97/sqm).

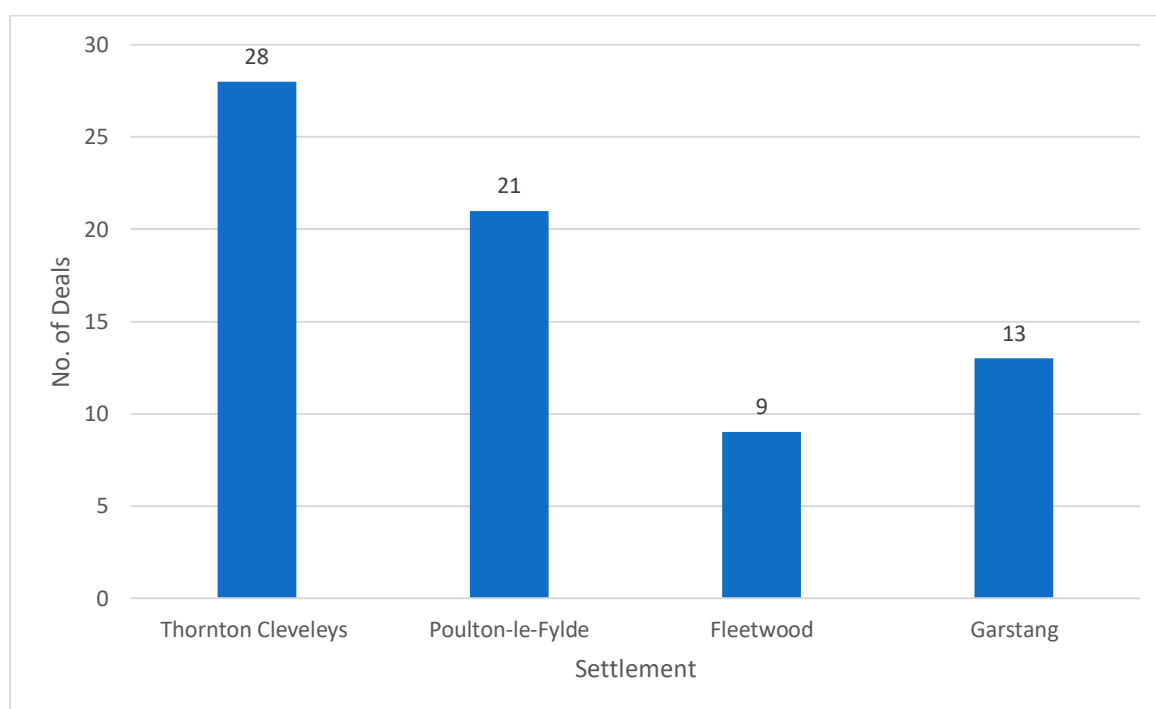
Figure 28 – Office Transactions by Size, 2013-2023 – Wyre



Source: Radius Data Exchange, 2023

- 4.49 In Figure 29 the 71 recorded deals are split by settlement. As can be seen office transactions are only recorded in four locations. In Thornton Cleveleys, office deals were somewhat focused at Marsh Mill Village, Thornton and along Victoria Road West, Cleveleys, mostly for sub 100 sqm units. Rents varied, with a range of £8-12/sqft (£86-129/sqm). A best rent of £17.42/sqft (£188/sqm) for a small, upper floor suite of 35 sqm on Brighton Avenue, Cleveleys was recorded in 2013.
- 4.50 In Poulton-le-Fylde, deals are spread throughout the town, with no particular focus on the town centre or Poulton Industrial Estate. Most deals are for sub 150 sqm suites, achieving £9-12/sqft (£97-129/sqm). The best rent was achieved on a small, 26 sqm suite on Chapel Street of £26.18/sqft (£282/sqm), likely including a service charge.

Figure 29 – Office Transactions by Settlement – Wyre



Source: Radius Data Exchange, 2023

- 4.51 In Fleetwood, most deals occurred in, or close to, the town centre, and included freehold sales of office buildings, of up to 400 sqm each, mostly on London Street which achieved sale prices of £40-50/sqft (£431-538/sqm).
- 4.52 In Garstang, deals were mostly on Windsor Road and Park Hill Road for suites of sub-400 sqm each. Average rents were £8-12/sqft (£86-129/sqm) each. A best rent of £16.13/sqft (£174/sqm) was achieved for a small suite of 20 sqm on Park Hill Road.

Overall Trends

- 4.53 Across the Fylde Coast, the vast majority of market activity is again for sub 500 sqm units, and particularly sub 200 sqm units. This is unsurprising as 88-90 percent of all local businesses in Blackpool, Fylde and Wyre are micro firms, employing less than ten staff (see Section 3.0), which will only generate small property requirements.
- 4.54 Activity for larger office suites is negligible although it is not clear if this represents a lack of demand or constrained supply. Since 2020 there has been a notable reduction in transaction rates, for offices of all sizes. As will be noted below, in the discussions with property market stakeholders, this reflects reduced market demand since the onset of the Covid-19 Pandemic. Across the sub-region, more than three quarters of transactions were leasehold.
- 4.55 The most active locations in terms of market transactions include Blackpool Town Centre, North Blackpool Technology Park, Blackpool Airport Enterprise Zone, Whitehills and Thornton Cleveleys. Most other sub-areas, including other town centres have seen only limited office market activity since 2013. Average rents are £8-12/sqft, mostly suggesting average quality (Grade B) stock.

SUPPLY

- 4.56 A schedule of vacant industrial floorspace being marketed in the three local authorities, as of Summer 2023, has been compiled from property websites such as Rightmove, EGi Property Link and commercial property agents' websites. This will only represent a portion of the true vacancy rate as there will be vacant floorspace not being marketed, including poorer quality floorspace and space being marketed informally without engaging agents.
- 4.57 The below supply is applied to the 86 Employment Areas reviewed in Section 7.0 to identify the occupancy rates of each area. It shows that almost all those areas are more than 90 percent occupied, across all premises types, suggesting a lack of choice for businesses.

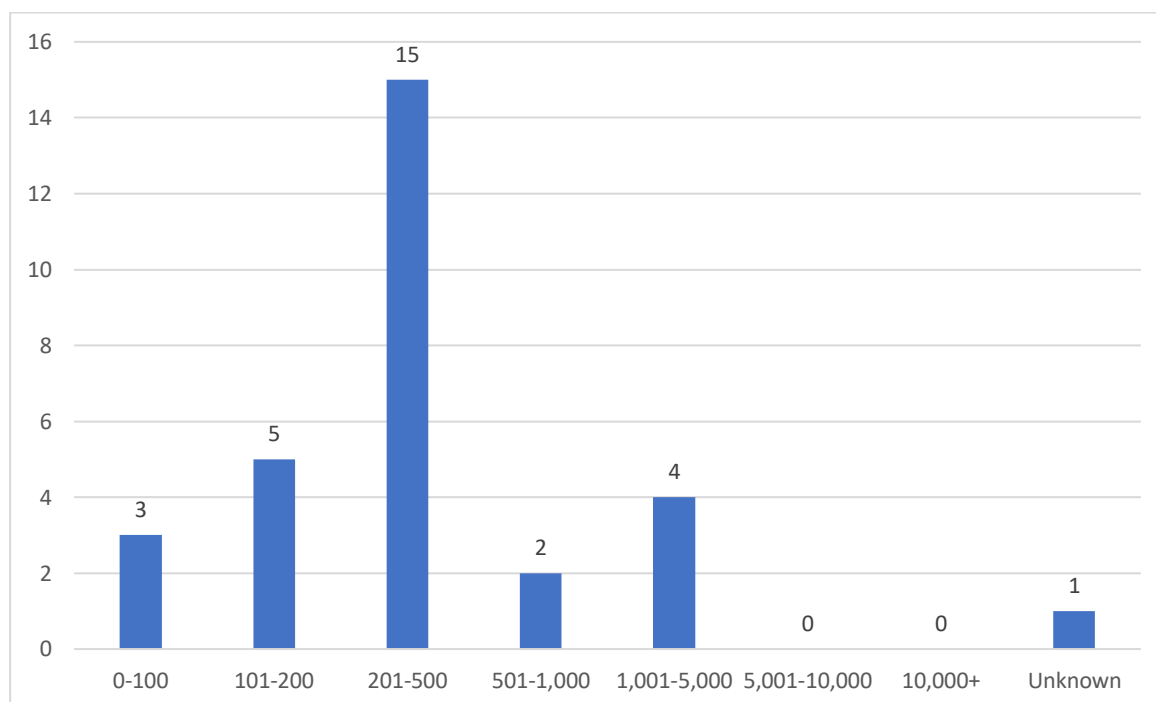
Industrial Supply

Blackpool

- 4.58 Within Blackpool, a total of 12,755 sqm of industrial floorspace was being marketed comprised of 30 individual premises (see Figure 30). From the property transactions noted above, it can be seen that, on average over the last ten years, 33 deals and around 15,700

sqm of floorspace have been transacted annually. This means that Blackpool only has around a year’s supply of premises available at the time of writing, less than a year if measured by floorspace.

Figure 30 – Marketed Industrial Property – Blackpool



Source: Radius Data Exchange, Various Commercial Agent Websites, 2023

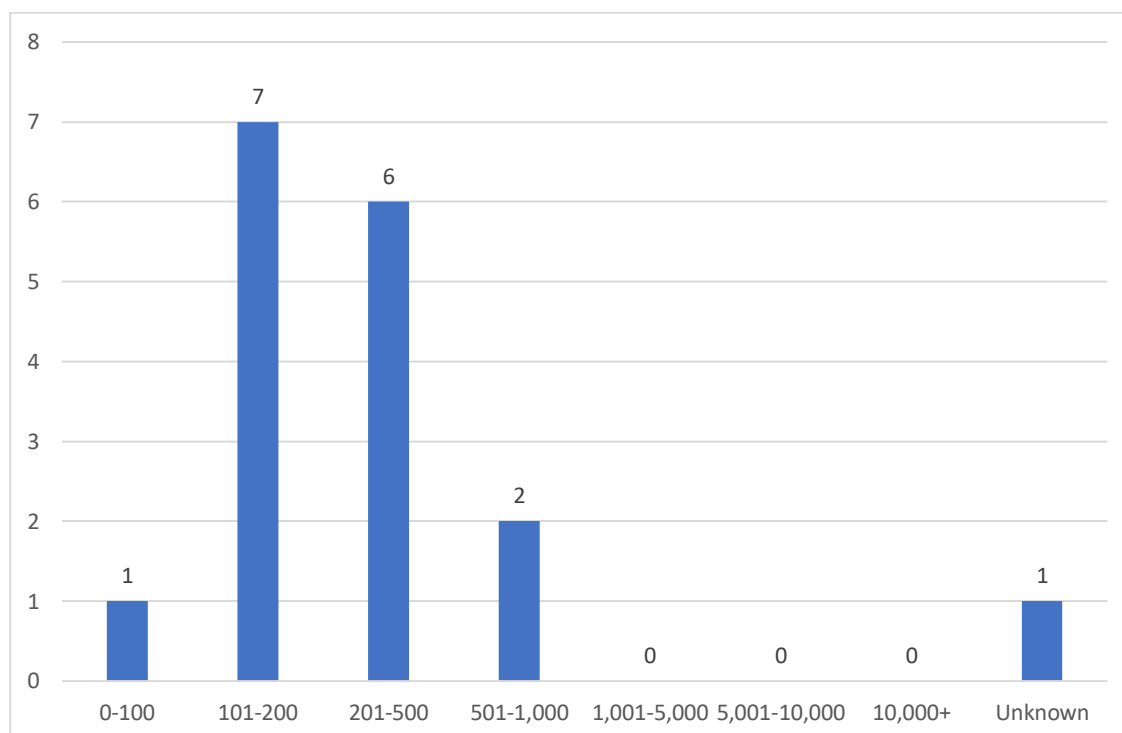
- 4.59 As Figure 30 shows, the supply of marketed properties was dominated by units of between 201-500 sqm in size, with 15 actively being marketed. This was followed by the 101-200 sqm and 1,001-5,000 sqm size bands, with five and four marketed units respectively. This supply somewhat reflects the transactional trend of the majority of properties let/sold in Blackpool being in the small-mid-market size, again reflecting the fact that most local businesses are micro firms employing 1-9 staff. However, there does appear to be a shortage of the very small units of less than 0-100 sqm, which saw strong take-up in the last ten years. There were no units of over 5,000 sqm marketed at this time which could be marketed to inward investors or allow the largest local businesses to grow.
- 4.60 The majority of units on the market were available to let, 70.0 percent of the marketed total, with the remaining 30.0 percent being for sale. No units were available to be both leased or purchased. The proportion of freehold units is thus similar to the proportion of freehold take up recorded in transactions.

- 4.61 Whilst rents are not given for all properties, the property with the highest quoting rent was Unit 7, The Wheeler Hub, Bristol Avenue, Bispham, which had an asking rent of £11.54/sqft (£124/sqm). This is a high spec, new build unit of 60 sqm. The median asking rent for all properties with available pricing information was £6.00/sqft (£65/sqm), close to the average achieved rent noted above.
- 4.62 The largest individual premises being marketed was Unit 1f, Squires Gate Lane, Squires Gate Business Park, which is 1,817 sqm in size. This unit was being marketed to lease for £5.47/sqft (£50/sqm). Units 18 and 19 of Blackpool Business Park, Amy Johnson Way were the largest premises currently being listed for sale. The 1,394 sqm units had an asking price of £1.95 million (£130/sqft or £1,399/sqm).

Fylde

- 4.63 Within Fylde a total of 4,378 sqm of industrial floorspace was being marketed comprised of 17 individual premises. On average over the last ten years, 18 deals and around 6,600 sqm of floorspace have been transacted annually. Thus, this marketed stock only represents less than a year's supply by premises numbers and some eight months' supply by floorspace.
- 4.64 As Figure 31 shows, the supply of marketed properties was predominantly for units between 100-500 sqm, with the largest amount of vacant property being between 101-200 sqm. This supply reflects the transactional trend of the majority of properties let/ sold in Fylde being in the small to mid-market size of less than 500 sqm. Units of sub 500 sqm comprised 87.5 percent of units being marketed and accounted for 80.8 percent of transactions in the last ten years.

Figure 31 – Marketed Property, Industrial - Fylde



Source: Radius Data Exchange, Various Commercial Agent Websites, 2023

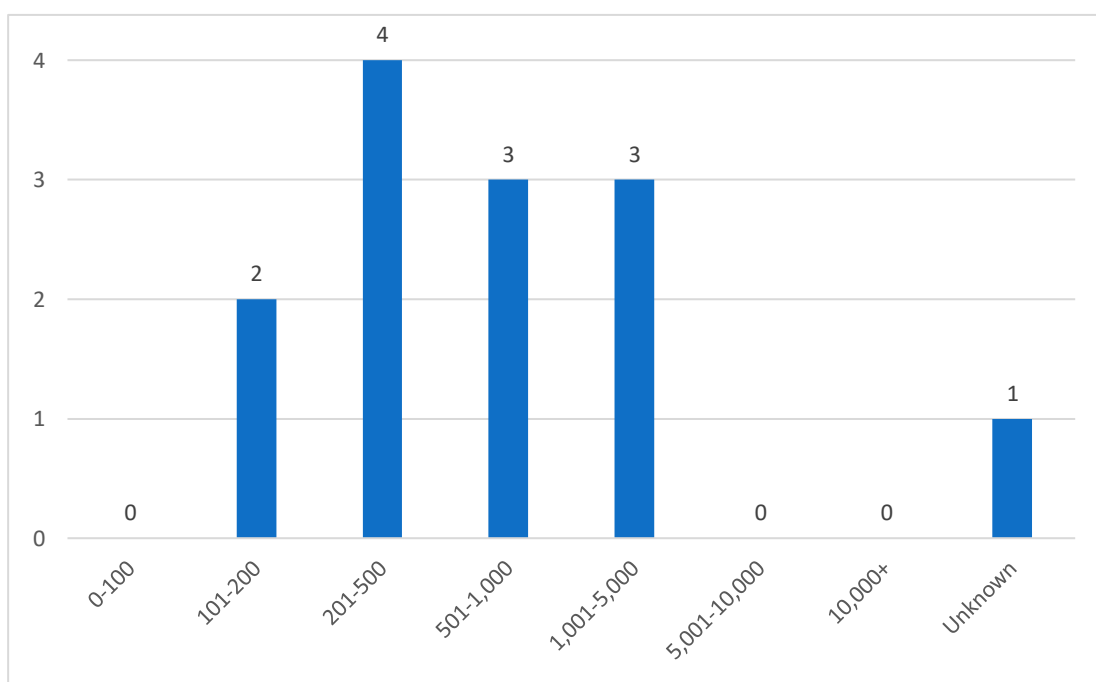
- 4.65 There were no units being marketed of more than 1,000 sqm each which could meet larger property requirements.
- 4.66 The majority of units on the market were available to let, 82.4 percent of the marketed total. Two units were available to lease or purchase and just one unit was solely marketed for sale. This would indicate a lack of freehold opportunities on the current market. Whilst rents are not given for all properties, the property with the highest quoting rent was Unit 7, Cropper Close, Whitehills Business Park, which was marketed for £9.22/sqft (£99/sqm) reflecting the comparatively high rents achieved in Whitehills historically, for recently completed stock.
- 4.67 The largest individual premises being marketed to lease was Unit E, New Hey Farm, New Hey Lane, Newton-with-Scales, which was 662 sqm in size. This unit was being marketed for £3.75/sqft (£40/sqm). Units 4 and 5, Whitehills Business Park, Graceways were the two largest units listed for sale, with an asking price of £175,000 (£117/sqft or £1,258/sqm). The 139 sqm units were also available to lease for £8.00/sqft (£86/sqm).

Wyre

4.68 Within Wyre a total of 7,899 sqm of industrial floorspace was being marketed comprised of 13 individual premises. From property transactions, it was noted, an average of 18 deals and 6,200 sqm of floorspace have been transacted annually over the last ten years. Thus, Wyre has the lowest supply level on the Fylde Coast, some nine months by premises numbers although this increases to 1.3 years by floorspace.

4.69 As Figure 32 shows, the supply of marketed properties was varied, with the largest amount of vacant property sized between 201-500 sqm. This supply reflects the transactional trend of the majority of properties let/sold in Wyre being in the small-mid-market size of less than 500 sqm. However, there were no units of less than 100 sqm marketed. Units of 201-500 sqm comprise 30.8 percent of units being marketed and accounted for 30.7 percent of transactions in the last ten years, suggesting a strong match between need and supply in this area.

Figure 32 – Marketed Property, Industrial - Wyre



Source: Data Radius Exchange, Various Commercial Agent Websites, 2023

4.70 The majority of units on the market were available to let, 76.9 percent of the marketed total. A further two units were available for purchase (15.3 percent). Finally, there was one unit that was available to be purchased or leased. This would indicate a lack of freehold opportunities on the current market. Whilst rents are not given for all properties, Units 9 and 10 Neptune Park, Dock Avenue, Fleetwood were the properties with the highest quoting

rent of £8.20/sqft (£88.26/sqm). Unit 9 is 186 sqm and unit 10 is 151 sqm. This is quite high in the Wyre context although it does reflect that Neptune Court is brand new and purpose built, aimed at specialist fish processing businesses.

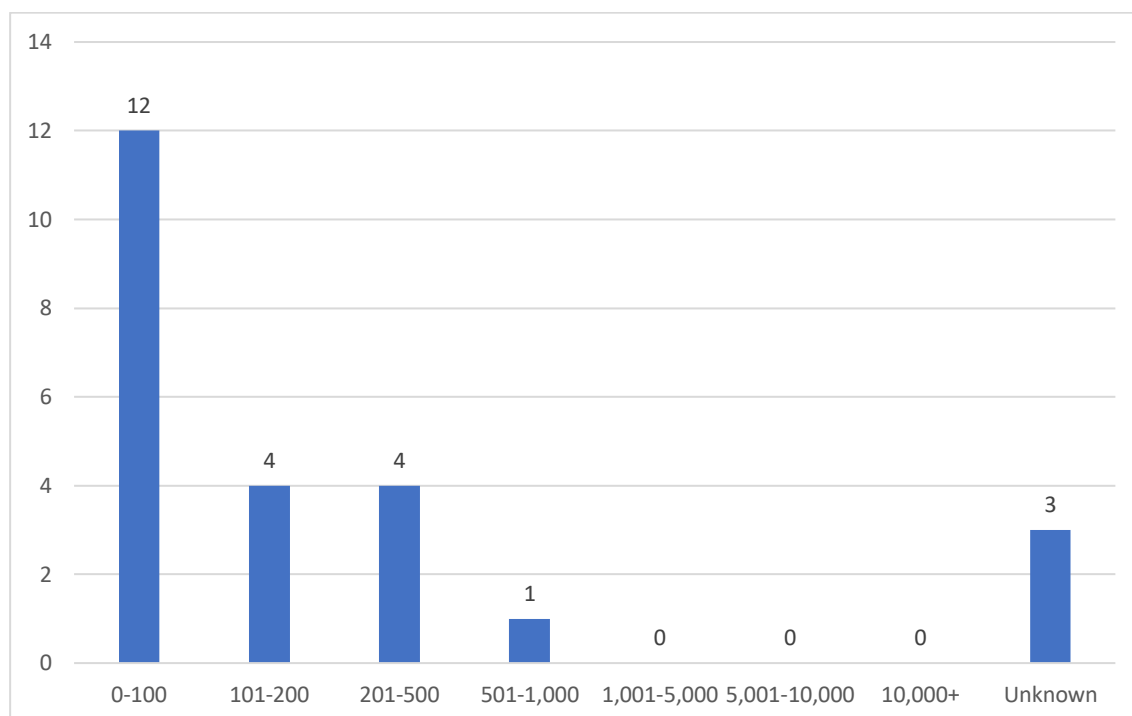
- 4.71 The largest individual premises being marketed was Unit E, Ice House Industrial Estate, Dock Avenue, Fleetwood which was 2,090 sqm in size. This unit was being marketed for £5.00/sqft (£53.82/sqm).
- 4.72 Unit 1, Navigation Way, Fleetwood was the largest unit available to purchase. The 650 sqm premises was listed for £550,000 (£79/sqft or £846/sqm).

Office Supply

Blackpool

- 4.73 24 vacant offices were being marketed in Blackpool as of summer 2023. These vacancies totalled 3,007 sqm (N.B. this excludes the 28,654 sqm of space at Warbreck Hill which is vacant but not being marketed for re-occupation and expected to be redeveloped). On average over the last ten years, 22 deals and around 7,300 sqm of floorspace have been transacted annually. This shows that Blackpool has around a year's supply of office space, by premises but only five months' supply by floorspace. However, the ten-year average may not reflect current trends as the Covid-19 pandemic has drastically altered business requirements for office space.
- 4.74 Unsurprisingly the largest amount of marketed office space was found within the small size bands, and in particular units of 100 sqm or less, accounting for half of the marketed total (see Figure 33). Overall, offices of sub 500 sqm accounted for all of the marketed units with size information stated. This is in line with demand seen from transactional data, with 82.7 percent of transactions in the last ten years also being sub 500 sqm.
- 4.75 Offices to let dominated the market in Blackpool and accounted for all but two of the marketed properties. One property was available for sale and the other was available to lease or for sale. Like with the industrial market, there is a lack of freehold opportunities for office space.
- 4.76 278 Church Street was quoting the highest rents within Blackpool of £19.05/sqft (£205/sqm). This reflects the size of the office, 25 sqm, and not high quality. The median asking rent was £12.48/sqft (£134/sqm).

Figure 33 – Marketed Property, Office - Blackpool



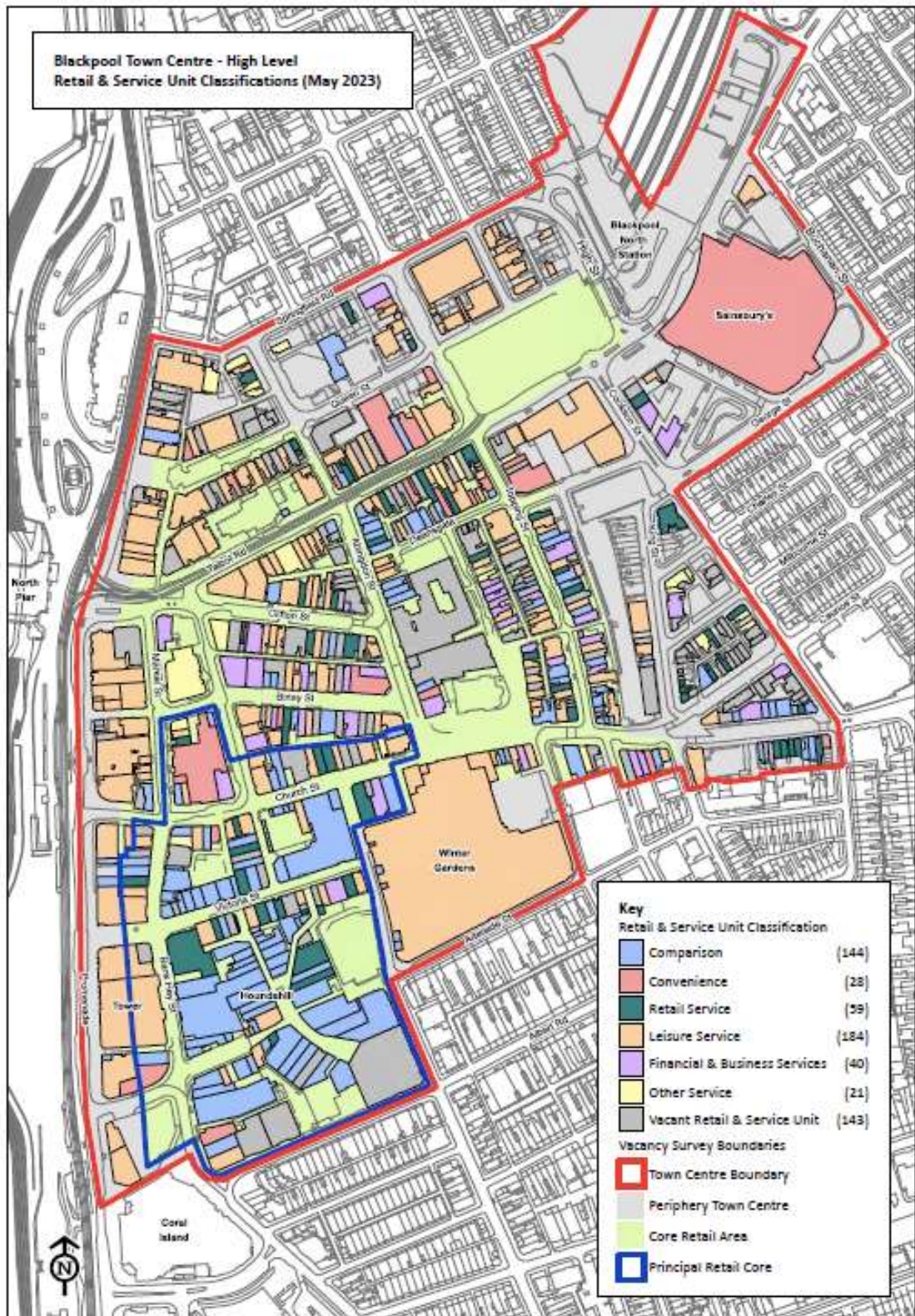
Source: Radius Data Exchange, Various Commercial Agent Websites, 2023

- 4.77 The largest office space on the market was Forsyth House, Queen Street, listed as 514 sqm. The two-storey building was being marketed for £6.00/sqft (£64.58/sqm).
- 4.78 As mentioned, vacant units in the Employment Areas are incorporated into the Employment Areas review in Section 7.0. However, it is important to note that none of the marketed properties were in the Town Centre, although two offices on Church Street, including the suite mentioned above, were in edge of centre locations. This is a notable supply gap given the focus of past transactions in, and around, the Town Centre noted above.

Blackpool Town Centre

- 4.79 Blackpool Council have also provided information with regards to Town Centre commercial vacancies as of May 2023. Figure 34 below identifies all occupied and vacant retail and service units within the town centre boundary. Leisure service represents the largest proportion of all the retail/service units, accounting for 184 out of 619, or 29.7 percent. Units of this type are particularly prominent along the promenade.

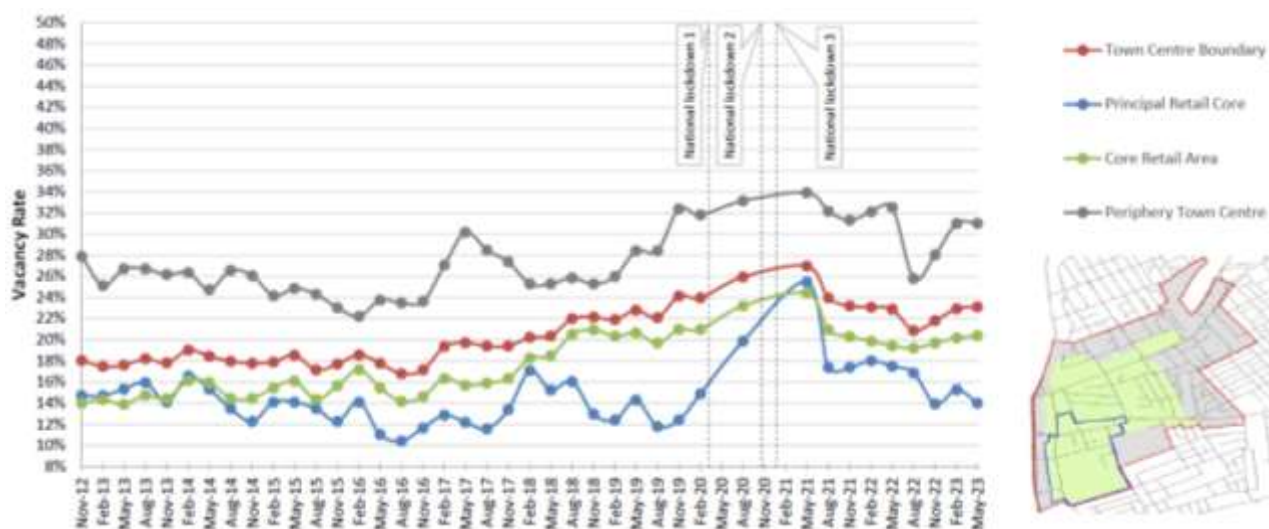
Figure 34 – Ground Floor Unit Classifications, May 2023



Source: BBC, 2023

- 4.80 The total number of vacant retail and service units in Blackpool Town Centre amounted to 143 units, equivalent to 23.1 percent of the total. 72 of the 143 units were located in the core retail area seen in Figure 34. A high density of vacant units in the core retail area in the town likely reflects the increase in vacant retail units observed nationally, since the 2020 Covid-19 Pandemic and related lockdowns.
- 4.81 49 of the 143 vacant units were located in the periphery town centre, predominantly to the east. Finally, there were 22 vacant units in the principal retail core, within the core retail area.
- 4.82 Blackpool Council have also monitored the vacancy rate in the town centre on a quarterly basis between 2012 and 2023, as illustrated in Figure 35. One significant trend observed in the data is the substantial change in the vacancy rate in Blackpool’s Principal Retail Core before and after the national lockdowns had taken place. This demonstrates just how damaging the national lockdowns were for retail occupancy during this time. However, Blackpool’s Principal Retail Core has shown strong signs of recovery, with the vacancy rate down to approximately 14 percent as of May 2023, below that observed in February 2020, just before the first national lockdown.

Figure 35 – Blackpool Town Centre Vacancy Rate, 2012-2023



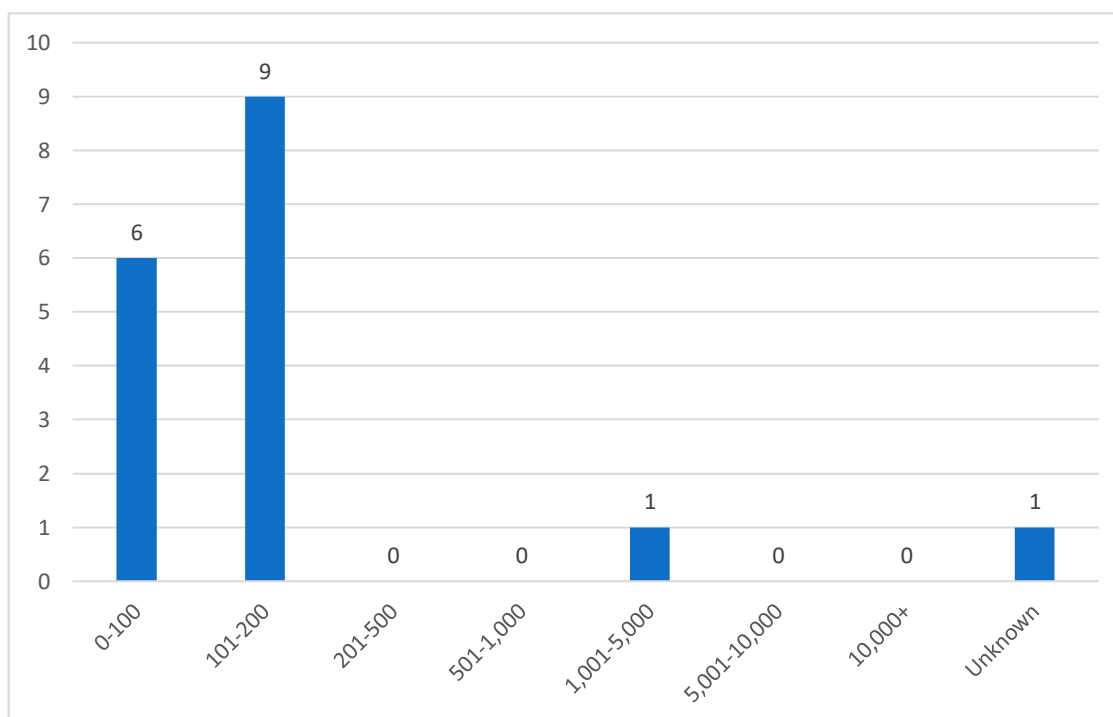
Source: BBC, 2023

4.83 As might be expected, the vacancy rate in the town centres periphery was higher than that observed in the core retail area throughout the measured time period. Located on the edge of the commercially established part of the town centre, the periphery areas of town will see less footfall. Subsequently, businesses are less likely to invest in the area, resulting in a higher number of vacant units.

Fylde

4.84 17 vacant offices were being marketed in Fylde as of summer 2023. These vacancies totalled 3,746 sqm. On average over the last ten years, 17 deals and around 4,100 sqm of floorspace have been transacted annually. Thus, Fylde has a year’s supply of offices by premises and just under a year by floorspace. However, the ten-year average may not reflect current trends as the Covid-19 pandemic has altered business requirements for office space, something discussed below.

Figure 36 – Marketed Property, Office - Fylde



Source: Radius Data Exchange, Various Commercial Agent Websites, 2023

4.85 The largest amount of marketed office space was found within the small size bands, and in particular units of 101-200 sqm and less than 100 sqm, accounting for 52.9 and 35.3 percent of the marketed total, respectively. Overall, units of sub 200 sqm accounted for 88.2 percent of all vacancies. This is somewhat in line with demand seen from transactional data, with 63.3 percent of transactions in the last ten years also being sub 200 sqm.

However, there were also a number of deals that took place in the 201-500 sqm size band and no premises were on the market in this size.

- 4.86 Offices to let dominated the market in Fylde and accounted for all of market properties, with no offices available for freehold purchase. There is thus a lack of freehold opportunities for office space.
- 4.87 A ground floor office at The Old Bakery, Green Street, Lytham was quoting the highest rent within Fylde, £18.18/sqft (£196/sqm) high in the Fylde context. The high asking rent reflects the size and high quality fit out of the office. Median asking rent in Fylde is £11.04/sqft (£119/sqm) which is above median rent noted in historic transactions.
- 4.88 The largest office space on the market was Calder House, St Georges Park, Kirkham listed as 1,936 sqm. The two-storey building was marketed for £6.48/sqft (£70/sqm), the second lowest at the time. This building comprised over half of the office floorspace total.
- 4.89 As noted, available units in the Employment Areas are discussed further in Section 7.0. However, it should also be noted that seven of the 17 available units (41.2 percent) were within St Annes and Kirkham Town Centres. Five suites of 50-180 sqm each were available in St Annes Town Centre, with quoting rents of £7-15/sqft (£75-161/sqm). Two suites of 80 sqm each were available in Kirkham Town Centre, with a quoting rent of £15/sqft (£161/sqm). All are upper floor suites, of reasonable quality, in multi occupancy buildings.

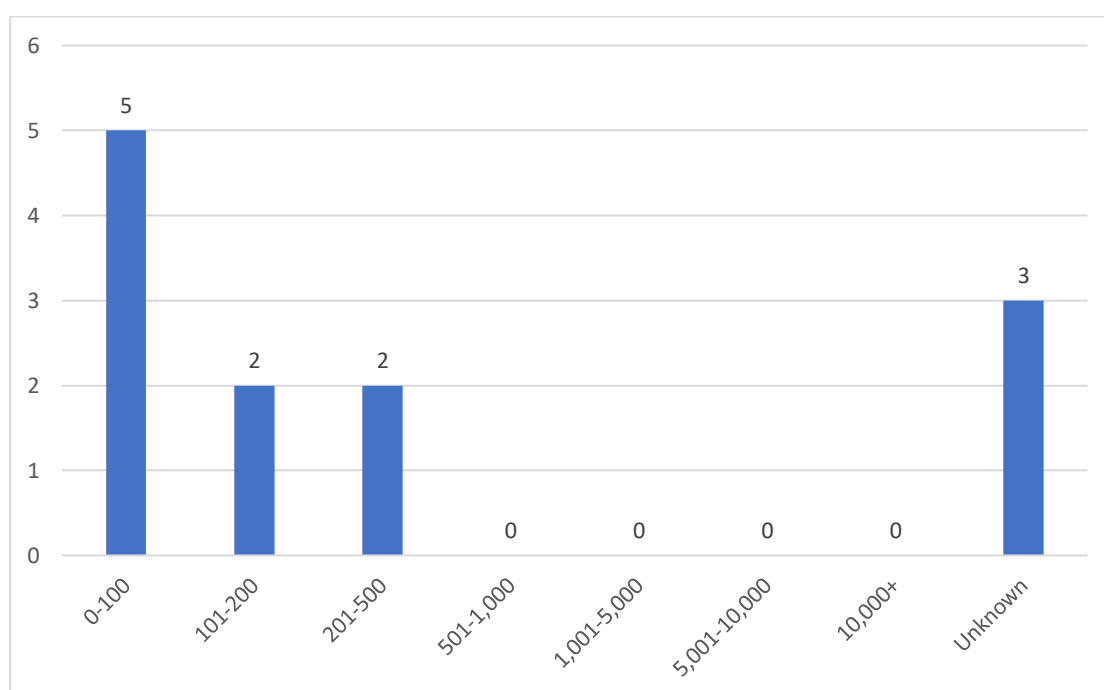
Wyre

- 4.90 12 vacant offices were being marketed in Wyre as of June 2023. These vacancies totalled 1,009 sqm. On average over the last ten years, seven deals and around 1,400 sqm of floorspace have been transacted annually. This represents nearly two years supply by premises, but less than a year by floorspace. Again, however, the ten year average may not reflect current trends as the Covid-19 pandemic has drastically altered business requirements for office space.
- 4.91 Unsurprisingly, the largest amount of marketed office space was found within the small size bands, and in particular units of less than 100 sqm, which accounted for 41.7 percent of the marketed total (see Figure 37). Overall, units of sub 500 sqm accounted for all marketed units with size information provided. Thus, as was true for Blackpool and Fylde, the supply reflects the size of suites most commonly transacted in Wyre over the last decade.

4.92 Offices to let dominated the market in Wyre, accounting for 11 of the 12 marketed properties. Like with the industrial market, there is a lack of freehold opportunities for office space.

4.93 A 45 sqm office barn conversion in Oakenclough Mill was quoting the highest rent within Wyre of £17.50/sqft (£188/sqm), high in the local context. The recent refurbishment and small size of the property allows this high asking rent to be sought after. Median rent for all the properties with rental rates available was £10.64/sqft (£115/sqm).

Figure 37 – Marketed Property, Office – Wyre



Source: Data Radius Exchange, Various Commercial Agent Websites, 2023

4.94 The largest office space on the market was North Lancs Training Centre, Fleetwood listed as 248 sqm. The premises was marketed for £9.37/sqft (£100.86/sqm).

4.95 Outside of the Employment Areas, three suites were on the market at Park Hill House, Park Hill Road, Garstang of 30-40 sqm each, with quoting rents of £12-13/sqft (£129-140/sqm) each. Also, another suite on London Road, Fleetwood was marketed although further details were not provided on that.

4.96 As mentioned, vacant units in the Employment Areas are incorporated into the Employment Areas review in Section 7.0. However, it is important to note that none of the marketed properties were in Wyre’s Town Centres. This is a notable supply gap given the focus of past transactions in, and around, the Town Centres, noted above.

VALUATION OFFICE DATA

4.97 The Valuation Office Agency (VOA) provides data on the overall number of business premises (hereditaments) and overall floorspace by broad use type, including offices and industrial/ warehousing. Table 49 which presents the latest VOA statistics (2022), shows that there were 3,230 industrial hereditaments and 1,750 office hereditaments in the Fylde coast at that time, totalling 1,396,000 sqm and 339,000 sqm respectively. Apart from the number of industrial units, Blackpool had the largest stock and the most overall floorspace. N.B. figures here will include units outside of the Employment Areas so will not accord with stock figures given in Section 7.0, which is a survey of the Employment areas only.

Table 49 – VOA Industrial and Office Premises and Floorspace

Local Authority Area	Industrial		Office	
	No. Units	Floorspace, sqm	No. Units	Floorspace, sqm
Blackpool	1,190	577,000	810	153,000
Fylde	800	329,000	510	118,000
Wyre	1,240	490,000	430	68,000
Total	3,230	1,396,000	1,750	339,000

Source: VOA, 2023

4.98 Comparing these VOA figures to the vacancy schedules above can provide an indication of the overall occupancy rate of the commercial premises. The occupancy rates calculated are estimates only due to the different timeframes of the two sets of data (VOA data and the vacancy schedules) and that some floorspace may be being sold off-plan (i.e., yet to be constructed). However, they do provide a reasonable indication of the overall performance of the market.

4.99 Occupancy rates of 90-95 percent can be considered a reasonable balance between a vibrant, active market, providing good returns to landlords and providing capacity for churn and growth in the market. A higher occupancy rate is an indicator of a full market with businesses having difficulties in finding adequate premises. A lower occupancy rate indicates long-term unoccupied and derelict stock and poor business growth.

4.100 Table 50 shows the occupancy rates for the Fylde Coast, less the vacant and marketed stock noted above. These occupancy rates suggest shortages of industrial and office stock across the Fylde Coast which may mean that businesses will have difficulty finding adequate space to meet their needs, in relation to the quality, specification, size and tenure of the building they wish to let/ buy.

Table 50 – Fylde Coast Industrial and Office Stock Occupancy Rates, Percent

Local Authority Area	Industrial		Office	
	Units	Floorspace	Units	Floorspace
Blackpool	97.5	97.8	97.0	98.0 ⁴⁰
Fylde	97.9	98.7	96.7	96.8
Wyre	99.0	98.4	97.2	98.5
Fylde Coast Average	98.1	98.2	96.9	97.7

Source: VOA, BE Group, 2023

4.101 In the case of Blackpool, the occupancy rate reduces significantly if the 28,654 sqm of vacant but not marketed stock of Warbreck Hill is included, although not by the number of units. However, redevelopment of this facility would remove this floorspace from consideration.

PROPERTY MARKET STAKEHOLDERS

4.102 This section provides qualitative evidence of the demand, activity levels in relation to spatial and size differences, key market interests and weaknesses in the market for industrial and office property within the study area. This data was gained through consultations with active commercial property agents and developers in the Fylde Coast. The results of other stakeholder engagement are set out in Section 5.0.

4.103 These views are the opinions of the representatives of the consulted organisations at the time of the consultations and they are not the views of the Councils, Capita or BE Group, (the consultants).

⁴⁰ The figure excludes the vacant and not marketed stock at Warbreck Hill. Including Warbreck Hill reduces the vacancy rate to 79.3 percent by floorspace

Industrial

- 4.104 Stakeholders report continuing strong demand for smaller industrial units of sub 500 sqm each, across the Fylde Coast, reflecting past transactions. Demand has cooled slightly in 2022-2023 in the face of macro-economic uncertainties, particularly inflation and rising interest rates, but this is only expected to be a short term constraint, with forecast recovery in 2024-2025.
- 4.105 In terms of rents, good quality smaller light industrial stock, such as the Wheeler Hub, in the Moor Park Industrial Estate, Blackpool, units of 60-70 sqm each, are achieving £11-12/sqft (£118-129/sqm) or £118/sqft (£1,270 sqm) to purchase. Larger units are achieving £7-8/sqft (£75-86/sqm).
- 4.106 There is a noted shortage of supply against demand. This should be pushing up rents and values, but other factors are mitigating against this, including rising interest rates and operational costs which are inhibiting what businesses can pay for. Combined with rising construction costs, which now exceed £100/sqft (£1,076/sqm), the limited rental growth is generating a significant viability constraint to most forms of new development. Accordingly, a lot of developers are delaying developments, pending improving market conditions which are expected from 2025 onwards.
- 4.107 Almost all development activity, across the Fylde Coast is for light industrial units at present, which are most viable. This will meet micro business needs but provides no options for the growth of established firms.
- 4.108 While there is some older stock on the Fylde Coast, no part of the sub-region has a particular oversupply of poor quality stock, and all local industrial estates are well occupied. Given demand shortages even lower quality options can usually secure occupiers quickly, particularly if they have good links to the strategic road corridors. Even for the worst space, rents don't usually drop below £5/sqft (£54/sqm).
- 4.109 At the larger end of the market, stakeholders report a significant shortage of mid-sized B2/B8 units of 1,500-4,000 sqm (with 8-9 metre high eaves and frequently a related showroom) each to allow local businesses, currently occupying units of around 1,000 sqm each to grow. The lack of such options is preventing local businesses growth, with firms having to look towards Central Lancashire to meet needs, although there are plenty of supply shortages in this sub region as well. It also means there are no options to market to inward investors. As will be discussed in Section 7.0, the main development in the pipeline

to provide such mid-sized/larger units is the Eastern Gateway proposals on employment site BB2: Eastern Gateway at Blackpool Airport Enterprise Zone.

4.110 Stakeholders do not report market interest for still larger 5,000 sqm stock, which might compete for regional and national enquiries. In Lancashire, interest for this size of units is focused on the M6 Corridor which benefits Lancaster and Central Lancashire against the Fylde Coast.

4.111 While the industrial and warehouse market is active across the Fylde Coast, demand is focused on locations which link to the M55 Corridor. This benefits Squires Gate and South East Blackpool, Whitehills and Kirkham/Wesham in Fylde and Thornton Cleveleys in Wyre. Even here though the market is predominantly local, drawing labour and occupiers from the main population centres of Blackpool, St Annes, Lytham and Thornton Cleveleys.

Office

4.112 The office market is quieter at present. Following the end of the Covid-19 Pandemic and associated Lockdowns, most businesses have accepted that hybrid working will be a permanent feature of operations moving forward. As a direct result, businesses are reassessing the amount of floorspace they need. Many businesses are downsizing, usually at the end of their lease periods (or at identified break periods in that lease). In particular, they are leaving older stock and prioritising higher grade options. This trend favours smaller, high grade suites of sub 200 sqm each which are well located on main road corridors and with good public transport links. Sustainability policies are also pushing businesses towards modern stock with higher EPC Ratings, against older options.

4.113 In this regard, the Whitehills and Blackpool Airport/Squires Gate is the most desirable location for office uses on the Fylde Coast, offering strong transport links and a sizeable body of high grade stock. The area also offers a good mix of serviced multi-occupancy space and self-contained suites, providing the flexibility to scale up or scale down their operations, as required, while staying local. The main Fylde Coast town centres, including Blackpool, St Annes, Lytham and Thornton Cleveleys benefit from critical masses of existing office firms who want to stay local but suffer from a lack of modern, higher grade space and serviced options which give businesses the flexibility they crave. Without investment in more modern space, it is expected that businesses will be forced to look further afield to support future growth or consolidation.

4.114 An oversupply of older stock is suppressing rents across Lancashire. New modern options could be expected to command rents of £10-12/sqft (£108-129/sqm) on the Fylde Coast, reducing to £6-9/sqft for older space (£65-97/sqm). This is only slightly less than the best rents which might be achieved in Preston, some £14.50/sqft (£156/sqm). However, it remains well below the rate at which new offices could be viable without public support, at least £25/sqft (£269/sqm). Such rates are completely unachievable anywhere in the North West outside of Manchester and Liverpool City Centres. Thus, any offices which are delivered locally for the foreseeable future will require public sector inputs. This is true even at prime locations such as Whitehills where the bulk of office development has been for design and build options, and speculative office development will not be considered.

Market Demand in the Blackpool Airport Enterprise Zone

4.115 The Enterprise Zone is around 90 percent occupied at present. Most demand has been from local firms, from Blackpool and other settlements in the west of the Fylde Coast, reflecting the lack of other supply options locally. Industrial space is achieving £6.25/sqft (£67/sqm) on average, while new build options are being quoted at £7-8/sqft (£75-86/sqm). The new build rate is considered the minimum rental level which general industrial space can be let at and still meet construction costs. The rate is high but not out of line with what is being quoted at Whitehills and competing locations in Central Lancashire.

4.116 The focus of demand is for sub 500 sqm industrial units, but agents also report good interest for 2,000-4,000 sqm units, mostly from established businesses from within the Fylde Coast and particularly from other areas of Blackpool. This is unsurprising as the Enterprise Zone is the main source of larger modern industrial/warehouses in the Fylde Coast. Demand far exceeds supply here, as is the case across the Fylde Coast and the developed industrial space is largely fully occupied. By sector, the strongest interest comes from advanced manufacturing companies, food and drink (mostly supplements) and ICT companies, which is in line with Enterprise Zone goals.

4.117 In terms of the office market, good demand is noted for sub 200 sqm suites, which are available in the serviced business centres. Demand is again from local businesses seeking higher quality suites, which are not readily available in Blackpool, St Annes or Lytham town centres. Agents are not seeing demand for larger suites.

Market Demand in the Hillhouse Enterprise Zone

- 4.118 Inward investment interest here is for battery storage and energy from waste facilities alongside demand for general warehouses of 1,000-2,000 sqm, mostly from firms from across Lancashire.
- 4.119 The strongest local demand is for industrial units, of mostly less than 1,000 sqm each, including an element of offices. Again, there is a shortage of industrial premises across the Fylde Coast. More limited interest, around two requirements per quarter, is also reported for larger manufacturing facilities of 1,000-6,000 sqm each from across Lancashire. Hillhouse accounts for around half of the enquiries received for Wyre.

SUMMARY

- 4.120 Although the macro-economic issues of 2022 have hit national/regional industrial and warehouse demand, reducing it from a 2021/early 2022 market peak, there remains plenty of market interest including a strong investment market. The overall occupancy rate for the North West was around 94 percent, as of mid- 2023. Lower than in previous years, but still a limited offer for businesses in terms of the scale and types/tenures of stock available. There is a particular shortage of higher grade stock. Development activity is focused on the sub-1,500 sqm market with rents for high grade space reaching £10.00 per sqft (£108/sqm), even in the second hand market.
- 4.121 Two years on from the end of the Covid-19 Pandemic and associated Lockdowns, office take up in the UK's main office market centres remains well below wider averages, although the exact amount of take up reduction can vary considerably depending on the sub-market. In terms of larger office-based businesses, there is greater boardroom acceptance of remote-working/hybrid working while firms are increasingly exchanging quantity for quality in location decision-making. With businesses seeking higher quality and flexible space, this benefits serviced schemes over unserviced and increases demand for Grade A space. The 'drive to quality' is pushing up rents which in turn encourages investors to invest in office accommodation.
- 4.122 Since 2006, the Councils have received 3,767 property enquiries, recorded through the Evolutive system. Since 2017, the number of enquiries received by the three Local Authorities, year on year, has reduced noticeably although businesses may be enquiring for premises via other means. Across the Fylde Coast, the highest proportion of enquiries are for industrial premises, and retail in the case of Blackpool. Interest for offices, and other uses is more modest.

- 4.123 Across the Fylde Coast, most enquiring for industrial units sought premises of sub-300 sqm each or greater than 1,000 sqm each, with a gap in interest in between. This trend was also true for storage units. It is likely that those enquiring for very large space likely had an area of search greater than the Fylde Coast, likely extending across Lancashire. Three quarters of those enquiring for office space sought suites of less than 300 sqm. Of this, 46.4 percent were for less than 100 sqm.

Market Transactions/Supply

- 4.124 Market transactions for the last decade have been reviewed. In terms of the industrial market, across the Fylde Coast, the vast majority of market activity is for sub 500 sqm units. Units of 500-5,000 sqm see occasional transactions while activity for units above 5,000 sqm each is negligible. The question to be determined is whether this reflects a lack of demand for larger units, or a lack of supply for businesses to take up. Since 2020 there has been a notable reduction in transaction rates and again it needs to be clarified if this reflects reduced demand or constrained supply. Both these points are considered in Section 10.0 Conclusions. Across the three Fylde Coast local authority areas, around a third to 86 percent of deals were leasehold, with Wyre having the largest freehold market.
- 4.125 The most active locations in terms of market transactions include the Blackpool Airport Enterprise Zone and Kincaig Business Park / Moorfields Estate in Blackpool, Whitehills in Fylde and the industrial estates of Thornton Cleveleys and Poulton-le-Fylde in Wyre. Average rents are £4-6/sqft (£43-65/sqm), extending to £8/sqft (£86/sqm) at prime locations. These rental levels suggest that the Fylde Coast does not have a significant problem with lower grade industrial stock.
- 4.126 In terms of office transactions, the vast majority of market activity is again for sub 500 sqm units, and particularly sub 200 sqm units. Activity for larger office suites is negligible although it is not clear if this reflects reduced demand or constrained supply. Since 2020 there has been a notable reduction in transaction rates and again it needs to be clarified if this reflects reduced demand or constrained supply. Both these points are considered in Section 10.0 Conclusions. Across the sub-region, more than three quarters of transactions were leasehold.
- 4.127 The most active locations in terms of market transactions include Blackpool Town Centre, North Blackpool Technology Park, Blackpool Airport Enterprise Zone, Whitehills and Thornton Cleveleys. Most other sub-areas, including other town centres have seen only

limited office market activity since 2013. Average rents are £8-12/sqft, mostly suggesting average quality (Grade B) stock.

4.128 The marketed supply of premises, as of Summer 2023, has been reviewed. By local authority area, the following can be noted in terms of the industrial stock:

- Within Blackpool, a total of 12,755 sqm of industrial floorspace was being marketed comprised of 30 individual premises. On average over the last ten years, 33 property market deals and around 15,700 sqm of floorspace have been transacted annually. This means that Blackpool only has around a year's supply of premises available at the time of writing, less than a year if measured by floorspace. Most units on the market were sub 500 sqm in size each. This supply somewhat reflects the transactional trend of the majority of properties let/sold in Blackpool being in the small-mid-market size. However, there does appear to be a shortage of the very small units of less than 0-100 sqm, which saw strong take-up in the last ten years. There were no units of over 5,000 sqm marketed at this time which could be marketed to inward investors or allow the largest local businesses to grow.
- Within Fylde a total of 4,378 sqm of industrial floorspace was being marketed comprised of 17 individual premises. On average over the last ten years, 18 deals and around 6,600 sqm have been transacted annually in the Borough. Thus, this marketed stock only represents a year's supply by premises numbers and some eight months' supply by floorspace. Most marketed units were 100-500 sqm each in size, with the largest amount of vacant property being between 101-200 sqm. This supply reflects the transactional trend of the majority of properties let/ sold in Fylde being in the small to mid-market size of less than 500 sqm. However, as elsewhere there were few larger units on the market and no options of more than 1,000 sqm being marketed, at that time.
- Within Wyre a total of 7,899 sqm of industrial floorspace was being marketed comprised of 13 individual premises. From property transactions, it was noted, on average 18 deals and around 6,200 sqm of floorspace have been transacted annually over the last ten years. Thus, Wyre has the lowest supply level on the Fylde Coast, some nine months by premises numbers although this increases to 1.3 years by floorspace. Again, the marketed supply mostly comprised sub 500 sqm units, which reflected transaction rates. However, there were no units of less than 100 sqm marketed and nothing available of more than 2,000 sqm in size which might compete for occupiers in the strategic market.

4.129 In terms of the supply of marketed offices:

- 24 vacant offices were being marketed in Blackpool as of summer 2023. These vacancies totalled 3,007 sqm (N.B. this excludes the 28,654 sqm of space at Warbreck Hill which is vacant but not being marketed for re-occupation). On average over the last ten years, 22 deals and around 7,300 sqm of floorspace have been transacted annually. This shows that Blackpool has around a year's supply of office space, by premises but only five months' supply by floorspace. However, the ten-year average may not reflect current trends as the Covid-19 pandemic has drastically altered business requirements for office space. Unsurprisingly the largest amount of marketed office space was found within the small size bands, and in particular units of 100 sqm or less which reflects past transactions. None of the marketed properties were in the Town Centre, although two were in edge of centre locations. This is a notable supply gap given that just over a third, 78 of the 220 recorded past transactions, occurred in, and around, the Town Centre.
- 17 vacant offices were being marketed in Fylde as of summer 2023. These vacancies totalled 3,746 sqm. On average over the last ten years, 17 deals and around 4,100 sqm of floorspace have been transacted annually. Thus, Fylde has a year's supply of offices by premises and just under a year by floorspace, although again market trends have changed in recent years. All but one marketed premises was sub 200 sqm in size. This is somewhat in line with demand seen from transactional data, with 63.3 percent of transactions in the last ten years also being sub 200 sqm. However, there were also a number of deals that took place in the 201-500 sqm size band and no premises were on the market in this size.
- 12 vacant offices were being marketed in Wyre as of June 2023. These vacancies totalled 1,009 sqm. On average over the last ten years, seven deals have completed each year, equivalent to around 1,400 sqm of floorspace per year. This represents nearly two years supply by premises, but less than a year by floorspace, although again market trends have changed in recent years. All marketed units were sub 500 sqm in size, which reflects transaction rates but provide no opportunities for established firms to grow.

4.130 The supply of freehold premises, of all types and sizes is limited across the Fylde Coast. The industrial and office stock across the Fylde Coast is over 95 percent occupied. These occupancy rates suggest shortages of industrial and office stock across the Fylde Coast which means that businesses will have difficulty finding adequate space to meet their needs, in relation to the quality, specification, size and tenure of the building they wish to let/ buy.

Property Market Stakeholders

- 4.131 Stakeholders report continuing strong demand for smaller industrial units of sub 500 sqm each, across the Fylde Coast, reflecting past transactions. There is a noted shortage of supply against demand. Almost all development activity across the Fylde Coast is for light industrial units, which are most viable. This will meet micro business needs but provides no options for the growth of established firms.
- 4.132 At the larger end of the market, stakeholders report a strong shortage of mid-sized B2/B8 units of 1,500-4,000 sqm each to allow local businesses, currently occupying units of around 1,000 sqm each to grow. The lack of such options is preventing local businesses growth. While the industrial and warehouse market is active across the Fylde Coast, demand is focused on locations which link to the M55 Corridor.
- 4.133 The office market is quieter at present. Following the end of the Covid-19 Pandemic and associated Lockdowns, most businesses have accepted that hybrid working will be a permanent feature of operations moving forward. As a direct result, businesses are reassessing the amount of floorspace they need. In particular, they are leaving older stock and prioritising higher grade options. This trend favours smaller, high grade suites of sub 200 sqm each which are well located on main road corridors and with good public transport links.
- 4.134 Blackpool Airport Enterprise Zone is around 90 percent occupied at present. Most demand has been from local firms, from Blackpool and other settlements in the west of the Fylde Coast. The focus of demand is for sub 500 sqm industrial units, but agents also report good interest for 2,000-4,000 sqm units, mostly from established businesses from within the Fylde Coast and particularly from other areas of Blackpool. In terms of the office market, good demand is noted for sub 200 sqm suites, which are available in the serviced business centres. Demand is again from local businesses.
- 4.135 Inward investment interest in the Hillhouse Enterprise Zone is for battery storage and energy from waste facilities alongside demand for general warehouses of 1,000-2,000 sqm, mostly from firms from across Lancashire. The strongest local demand is for industrial units, of mostly less than 1,000 sqm each, including an element of offices.

5.0 STAKEHOLDER CONSULTATIONS

INTRODUCTION

- 5.1 This section provides commentary about the Fylde Coast, drawn from consultations with the public sector, higher/further education operators, business representative fora and major businesses. These views are the opinions of the representatives of the consulted organisations at the time of the consultations and they are not the views of the Councils, Capita or BE Group, (the consultants).
- 5.2 Discussions with private sector developers and property agents are outlined in Section 4.0, Property Market Assessment. Discussions with neighbouring local authorities are included in Section 6.0, Functional Economic Market Area. A list of the organisations, businesses and commercial property agents spoken to within the study is listed in Appendix 1.
- 5.3 To ensure anonymity, the details of engagement are set out here by topic rather than by contributor, with the topics being:

Market Activity

- Inward investment market
- Business needs and operational issues.

Public Sector Programmes and Activities

- Lancashire 2050
- Enterprise Zone growth prospects
- Regeneration programmes and projects

Skills

- Skills needs, skills gaps and skills improvement prospects

MARKET ACTIVITY

- 5.4 It should first be noted that general market comments are covered in Section 4.0, where healthy demand for industrial units of all sizes is noted. The market is meeting needs for sub-500 sqm units while there remains a shortfall of larger options, which can be difficult to deliver viably without an agreed occupier. Office market demand is more limited, focused on sub-200 sqm suites, with little prospect of private sector office development in the short to mid-term, given viability constraints.

Inward Investment Market

- 5.5 In Lancashire, Pennine Lancashire has historically been most successful in attracting inward investment, in sectors such as aerospace, logistics and advanced manufacturing. This reflects the availability of serviced development land immediately off M65 junctions, which was well marketed by sub-regional agencies. Inward investment onto the Fylde Coast has been more limited, even in the Enterprise Zones. At the Blackpool Airport Enterprise Zone, the most active of the three, investment has mostly been from local industrial firms. At the Warton Enterprise Zone activity has been limited to the activities of BAE and its immediate sub-contractors. At the Hillhouse Enterprise Zone, inward investment is for energy generation facilities rather than manufacturing companies.
- 5.6 When they occur, inward investments to the Fylde Coast come from the medical, metal processing and food and drink sectors. Requirements for the Fylde Coast are typically for 1,000-7,000 sqm units on motorway accessible sites. There is also a lack of smaller business hubs which could accommodate support personnel or decentralised or hybrid workers from large companies. There is a lack of larger industrial sites both to allow inward investment and allow local businesses to grow.
- 5.7 Several businesses, including manufacturing firms, had to leave the Fylde Coast due to an inability to find available employment land. Smaller investors report a lack of smaller manufacturing units, delivered speculatively and thus immediately available to meet needs.
- 5.8 Some companies are also struggling to find the units with sufficient power supply for their needs.

Businesses Needs and Operational Issues

- 5.9 Consultations have taken place with a range of major employers located across the Fylde Coast. The **industrial/warehouse businesses consulted** trade in a range of high value advanced manufacturing uses in areas including energy, aerospace, automotive, wholesale and materials development. Most companies are looking beyond the short term macro-economic issues of 2023, such as increasing inflation and interest rates (which are increasing labour costs), to plan for long term growth of 15 years or more. Such growth may result from an assumed annual production/sales increase, on average around 5 percent/year, or through specific plans to expand their product lines and increase their market shares. Some three years after the UK left the European Union, businesses have

also factored the increased challenges to exporting, and do not view them as a significant barrier to growth.

- 5.10 Economic growth invariably means demand for more premises and there is a desire to more than double the size of existing facilities. This generates property requirements of 5,000-30,000 sqm, albeit not always in a single property. Given the almost complete absence of available properties in this size range available on the market, most businesses have long accepted that they need to plan for their own growth. The businesses consulted have generally been planning for long term expansion for some years now, since at least 2015. However, opportunities to fulfil these requirements have varied, meaning that a number of firms have struggled to find the available, unconstrained land (sites of up to 7.5 ha) they need to meet their requirements.
- 5.11 Many of the largest businesses on the Fylde Coast are long established in their operational locations, drawing labour from their local areas. They would thus prefer to grow in the local area. However, this is frequently impractical as they are often based in the smaller settlements of the Fylde Coast, or in mostly residential areas of Blackpool. If they do need to expand or relocate to more distant locations, businesses generally wish to remain in the Fylde Coast, the source of most of their labour. As with other businesses, sites with immediate access to the M55 are most favoured, including Blackpool Airport Enterprise Zone, Whitehills, Kirkham/Wesham and to a lesser degree sites at Thornton Cleveleys and Poulton-le-Fylde.
- 5.12 Other than these often long term property needs, industrial/warehouse businesses are broadly satisfied with their locations in the Fylde Coast. In terms of infrastructure, it should be noted that advanced manufacturing businesses frequently have higher than average power requirements that cannot be met in a standard industrial unit. However, as many of these businesses are seeking bespoke premises, developed to meet their specific requirements, such issues can be factored in. Businesses do not report significant issues with crime or anti-social behaviour, other than some concerns over trespass by some gypsy and traveller groups for rural businesses.
- 5.13 Larger industrial/warehouse businesses employ 100-600 staff each. Few are employed on a part time basis and homebase or hybrid working is not a feature of their operations, even for office- based staff. Larger manufacturing businesses are frequently active participants in apprenticeship programmes, led by local colleges, to train and secure staff. There are shortages of appropriately trained production staff, however, the highly specialist nature of

many businesses means that they have always had to undertake an element of on-site training.

- 5.14 Two growth areas in terms of labour demand include individuals trained in aerospace manufacturing and energy generation activities. The Fylde Coast has a strong body of skilled staff in the former but needs to build its skills base in the latter. The Westinghouse Springfield Nuclear Facility has an established labour base, extending into Central Lancashire, and has the capacity to recruit staff from across the UK. However, developing other energy facilities, particularly at the Hillhouse Enterprise Zone, to meet UK Zero Carbon Targets, will require a further pool of staff skilled in highly technical roles that is not available at present.
- 5.15 As with the industrial/warehouse businesses, **the office firms contacted** report longer term growth plans which will generate property requirements of up to 3,000 sqm over the Local Plan period 2022-2042. Although office businesses have increasingly embraced hybrid working practices since 2020, steady staff growth will still generate office space needs over time. Again, office spaces in this size range are rarely available locally and businesses have been proactive in securing space when it becomes available, most notably in Lytham. Offices with good links to the M55 Corridor as well as in Lytham and St Annes are most desirable.
- 5.16 The largest (private sector) office businesses employ 100-300 staff each. Even with hybrid working this generates sizeable car parking requirements which can be hard to meet in town centre sites, favouring out of town business parks. In terms of skills, staff in financial services sectors can be hardest to recruit locally, at least in the large numbers needed, and businesses generally accept a high proportion of their staff will commute in from across Lancashire and the North West.
- 5.17 Other than securing space in locations with sufficient car parking and appropriate access, businesses do not report other significant barriers to their operations. Businesses in urban locations do see some issues with anti-social behaviour although this does not extend to more significant property crime.

- 5.18 In terms of **public sector offices**, the Department of Work and Pensions (DWP) plans to relocate the bulk of its staff to the new offices under construction in King Street in Central Blackpool. This will house some 3,000 staff transferred from Warbeck House, Blackpool; Peel Park, Whitehills, Fylde and Hesketh House, Fleetwood, Wyre (which it is temporary sub-letting) to run DWP back office functions. In terms of these existing offices:
- Warbreck House, Warbreck Hill, Blackpool – Now fully vacated with staff relocated to Peel Park and Hesketh House
 - Peel Park, Whitehills – Currently houses some 100 staff, awaiting transfer to King Street.
- 5.19 It is not yet clear if Peel Park will be retained or released by the DWP. The DWP also operates a range of customer focused Job Centres across the Fylde Coast and two Youth Hubs – One at Fleetwood Hospital Site, the other at Bickerstaffe House, Talbot Road Blackpool – which serve youth customers of unemployment services who would otherwise go to the normal Job Centres.

PUBLIC SECTOR PROGRAMMES AND ACTIVITIES

Lancashire 2050

- 5.20 Lancashire 2050 builds upon the work of the Lancashire Infrastructure Plan (2021) with a larger, longer term Sectoral Growth Plan. It aims to identify what Lancashire will need in the longer term in terms of strategic sites to allow sectoral growth. Launched in London in 2022, it is based around eight key themes:
- *“Economic prosperity – Succeed as a globally recognized, competitive and sustainable economy, distinguished by its quality of life, connectivity and access to opportunities.*
 - *Environment and climate – Meet our low carbon ambitions, promote clean energy and enhance our rich natural environment.*
 - *Transport and infrastructure – Become better-connected and accessible, with infrastructure that links opportunities to need, and travel choices that are safe, inclusive, affordable and low carbon.*
 - *Housing – Deliver decent and affordable housing for every community. High quality housing will benefit existing residents, as well as attract and retain the people required to drive the economy over the long term.*
 - *Early years and education – Support all our children so they are ready to learn, achieve, and can access opportunity.*
 - *Health and wellbeing – Improve health, life chances and independence, so residents can live healthy lives and access quality care when they need it.*

- *Employment and skills –Support people to develop skills throughout their lives and attract business to the county because of our high skilled workforce.*
- *Communities and place – Build pride, belonging, and resilience in all our diverse communities and ensure people have a voice and stake in Lancashire’s future.”*

5.21 Each theme is to be developed by LCC leadership with officer support from the districts. Each Theme Group will produce an action plan based on their progress. The work will inform the actions of the County Council, and the unitary authorities of Blackpool and Blackburn with Darwen, under devolution proposals.

5.22 Work underway to date includes the Lancashire Strategic Pipeline Study, being completed by consultants, working with Blackpool and, Blackburn with Darwen Councils and LCC. The study assesses strategic projects and sites against agreed criteria to identify locations which can be marketed nationally and internationally to raise the profile of Lancashire. It aims to identify ten transformational projects/sites and clarify what is needed to unlock them, including any needs from national government. The ten projects/sites could be defined geographic locations or more dispersed economic clusters such as the Lancashire Enterprise Zone, Samlesbury-Warton Aerospace Cluster. The programme thus has the potential to stimulate economic growth across Lancashire, by opening up strategic projects to development more rapidly and more completely than would otherwise have occurred, but to what degree is not clarified. It should be noted that the project will not include any new forecasts of jobs change to 2050 or analysis of the supply of and demand for, employment land.

5.23 LCC are also setting up a Lancashire 2050 Data Observatory, bringing together the public sector, businesses, and Universities to create a common resource. Further thematic studies are expected which will draw on Cambridge Econometrics jobs forecasts, the same forecast model used in this Economic Needs Update and Employment Land Needs Study.

Enterprise Zone Growth Prospects

5.24 This section considers the three Enterprise Zones of the Fylde Coast – the Blackpool/Blackpool Airport Enterprise Zone in Fylde and Blackpool; Hillhouse Enterprise Zone in Wyre and the Lancashire (BAE Warton) Enterprise Zone in Fylde which is twinned with BAE Samlesbury in Central Lancashire. It should first be noted that the main Enterprise Zone advantages ended in March 2023, including Enhanced Capital Allowances. From this point onwards, the main benefits the Enterprise Zones possess are the retention of

Business Rates generated on site, for reinvestment into the Zones, and some elements of simplified planning.

Blackpool/Blackpool Airport Enterprise Zone

- 5.25 The Enterprise Zone is a 144 ha site that includes Blackpool Airport, Blackpool Business Park, Squires Gate Industrial Estate, Sycamore Industrial Estate and land up to the border of Common Edge Road in the south east quadrant of the Enterprise Zone. The Zone straddles the boundary between the Boroughs of Fylde (which accommodates 55 percent of the Enterprise Zone) and Blackpool. Much of the operational airport land, in Fylde Borough, is within Green Belt, with land held by some 20 freehold and long leasehold property interests and over 200 occupiers.
- 5.26 Development to date has focused on Blackpool Business Park, which falls within Blackpool Borough. This has included light industrial units, mostly of sub-250 sqm each with a range of other light industrial schemes in the pipeline (plans on the remaining development plots here are discussed further in Section 6.0, as part of the wider analysis of the employment land supply). This is an important source of smaller business units, of sub 500 sqm each, as noted in Section 4.0, which form the bulk of the industrial market activity in the Fylde Coast.
- 5.27 Sites at Blackpool Business Park have also been taken up by a number of larger industrial businesses, most being relocations from within the Fylde Coast, for units of 3,000-4,000 sqm each. Key occupiers include Force Tech, Multi-Ply and Magellan Aerospace. Many sites have expansion space for the business which could provide further space of 1,000-4,000 sqm. Thus, Blackpool Business Park has also been a key source of growth accommodation for established businesses, proving space is not available elsewhere in the Fylde Coast, either as developed property or as serviced development plots.
- 5.28 Given the lack of growth opportunities for larger industrial and warehouse businesses, elsewhere in Blackpool, a key development moving forward will be the Eastern Gateway site. Located east of Blackpool Business Park, this site is considered in more detail in Section 6.0, however, it is marketed for a scheme of six B2/B8 Units of 1,394-6,968 sqm each (21,367 sqm of total floorspace), with a 5 year delivery timeframe. These are the only larger B2/B8 units proposed on the Fylde Coast at this time. Delivery is expected to be as design and build options or through a joint venture between Blackpool Council and a developer. This site will be opened up by the new link road through the site to the B5261 Common Edge Road, which has planning consent and is due to be delivered over 2024.

- 5.29 Blackpool Airport Enterprise Zone is also a focus for office market activity in the Fylde Coast, along with Whitehills, something discussed further in Section 4.0. Viability issues mean that the delivery of new offices, by the private sector, is very unlikely anywhere on the Fylde Coast in the short-medium term. With this in mind, the public sector led Knowledge Quarter (Silicone Sands) proposal, again discussed further in Section 6.0, is the main opportunity for office development on the Fylde Coast. Development here is strongly dependant on securing public funding as well as the relocation of Airport uses south. The latter has commenced, with consent now being sought for the development of new hangar space for the Airport west of Blackpool Business Park.
- 5.30 A recent business survey suggests that the Blackpool Airport Enterprise Zone now accommodates some 2,300 jobs although a high proportion of these are relocations from elsewhere on the Fylde Coast.

Hillhouse Enterprise Zone

- 5.31 The Hillhouse Enterprise Zone is located on the site of the former ICI manufacturing plant at Thornton. It is home to some 40 businesses but is dominated by two chemicals firms – Victrex and AGC. Victrex, which employs 600 in the Zone (including sub-consultants) and recently completed some 2,200 sqm of new production space. AGC employs some 200 and are at capacity with the business looking to grow locally. The third large occupier, PVC manufacturer Vinnolit, has now vacated Hillhouse but its four warehouses have since been refurbished and have been reoccupied. Other companies in the Enterprise Zone are generally local micro-small businesses, employing 10-25 each.
- 5.32 There are multiple energy and gas electricity generators in the Zone and the main future development plans are for hydrogen production and energy generation facilities. An initial 10 MW facility is proposed in a former Vinnolit warehouse, and a larger 100 MW facility is proposed in the southern part of the Enterprise Zone, occupying land previously proposed for a power station. These facilities would power Victrex and provide fuel stations at Fleetwood Port and elsewhere. Consideration of the current development plans at Hillhouse, in a plot by plot basis, is undertaken in Section 6.0.
- 5.33 A key offsite project, related to Hillhouse, is the Preesall Underground Gas Storage Facility. Here, Halite Energy Group is seeking to develop an Underground Natural Gas Storage Facility. Up to 19 underground caverns would be individually designed and constructed and used for the storage of up to 900 million cubic metres of natural gas. Gas distribution pipelines and connections to the wellheads and a pipeline that links the facility to the

National Transmission System (NTS) at Nateby, 12 km to the east, would also be constructed. This facility could also be used to store hydrogen from Hillhouse before returning it for use in power generation. Final investment is near completion from a major power company and other investors.

- 5.34 Enterprise Zone expansion will require a new access road which is at the design stage. £700,000 has recently been spent on other infrastructure from the Getting Building Fund. Superfast Broadband is now available from the site entrance.
- 5.35 Stakeholders estimate that some 300 jobs have been generated at Hillhouse over the lifetime of the Enterprise Zone, but a largely equal number have been lost with the departure of Vinnolit.
- 5.36 Market demand at Hillhouse is discussed in Section 4.0 but, alongside energy generation facilities, most interest is from existing local firms looking to relocate with interest from businesses in the site, for aggregates, plastics recycling and civil construction sectors.
- 5.37 Over 2024 a new masterplan is being produced for the Enterprise Zone, which will update the 2018 Masterplan. As was the case in 2018, the new Masterplan is expected to propose the bulk of the available land for energy from waste/sui generis development with a focus on chemical and energy generation.

Lancashire (BAE Warton) Enterprise Zone

- 5.38 The Lancashire Enterprise Zone site remains in the exclusive use of BAE. There are no companies occupying the area that are not directly part of BAE operations. The activities of BAE and its suppliers on the Warton site remain classified, however stakeholders note that in December 2022 BAE won the UK defence Global Combat Aircraft Contract to replace the Typhoon Fighter Jet. This contract secures BAE's future in the North West for the long term and will likely draw supply chain companies to both parts of the Lancashire Enterprise Zone and the Blackpool Airport Enterprise Zone as well.
- 5.39 However, with all land at the Sablesbury Enterprise Zone now developed or identified for the new National Cyber Force Campus, the emphasis of development will move to Warton in the future. Over 2023/2024 a new masterplan is being produced for the Warton Enterprise Zone, which will update the 2014 Masterplan. As was the case in 2014, the new Masterplan is expected to propose the bulk of the available land for E(g)/B-Class development with a focus on aerospace and advanced manufacturing activities. Further details on this are

confidential at this time. The Local Development Order for Warton will lapse in 2024 and it is expected that BAE will engage with Fylde Council to renew this.

- 5.40 BAE Warton will benefit from the new Junction 2, M55 which provides more direct motorway access. Previously, for BAE Warton, the most direct motorway access would have been north to Junction 3, M55 via rural roads. This improved access will make the location more desirable to occupiers.

Regeneration Programmes and Projects

- 5.41 There are a diverse range of economically focused regeneration projects being enacted in each of the three local authority areas, these are discussed here.

Blackpool

- 5.42 In Blackpool Borough, regeneration is focused around its Growth and Recovery Programme which will deliver some £2 billion in investment. This is based on three main strands:

- Town Centre Regeneration, focused on the Talbot Gateway development
- Extending the Tourism Season, focused on the Blackpool Central development
- Jobs in Growth Sectors, focused on the Enterprise Zones discussed above.

- 5.43 In terms of Town Centre Regeneration, the goal is to increase visits and footfall in Blackpool Town Centre. At present, only 40 percent of visitors to Blackpool access the Town Centre. The primary project in this strand is Talbot Gateway, a £350 million development which is led by Blackpool Council, alongside its long term partner Muse. The scheme is redeveloping the area around Blackpool North railway station in order to bring more workers and students into Blackpool Town Centre and create more jobs and opportunities for local people.

- 5.44 A multi-phase project, the first phase was completed in 2014 with the opening of the 11,600 sqm Number One Bickerstaffe Square council office, a Sainsbury's supermarket and a refurbished 650-space multi-storey car park, alongside public spaces, some £80 million in investment. Phase Two comprises a tram/transport interchange at Blackpool North Station, plus a Holiday Inn and Marco Pierre White restaurant. These comprise some £35 million in investment and will generate some 87 jobs (39 additional). Development is underway on the site of the old Wilko store and multi-storey car park, with completion expected in 2024.

- 5.45 Phase three will comprise the 20,000 sqm Civil Service Hub on King Street, for the relocation of 3,000 DWP staff, as discussed above. This is under construction, at a cost of £99 million, with completion expected in 2025.
- 5.46 A related project is the 'Multiversity', the relocation of the Blackpool and Fylde College's Palatine Road campus to a new carbon neutral university site in the town centre. Land assembly for this is underway, with £40 million in Levelling Up Funding secured. It is proposed to open in 2027. Blackpool and Fylde College is to run the completed scheme which will house its higher education courses, with some 157 jobs transferred to the new scheme (and 32 indirect jobs generated). It will replace the University Centre, Park Road, Blackpool which will then be disposed of for uses to be determined.
- 5.47 Other projects in this strand include:
- Further Civil Service offices
 - Shared prosperity funding for public realm investment
 - Houndshell Shopping Centre Phase 2 extension – Imax cinema and restaurant opening in spring 2024
 - Abingdon Street Market refurbishment completed
 - Winter Gardens Conference and Exhibition Centre, £25 million in investment.
- 5.48 The strand Extending the Tourism Season, concerns breaking Blackpool's dependency on seasonal tourism. The core project is Blackpool Central, a £300 million scheme which is expected to create around 1,000 new jobs, bring an estimated 600,000 additional visitors each year, and boost annual spend in the town by around £75 million. Taking up land adjacent to Central Pier, led by developer Nikal, development will include a 1,306 space Multi Storey Car Park and a 'Heritage Quarter'. The Heritage Quarter will include:
- The Grade II Listed former King Edward VII Picture House transformed into a new 'Artisan Food Hall', with new outdoor dining space
 - The locally listed King Edward VII pub refurbished into a new pub and hotel
 - The King Edward VII apartment building renovated into an 'Aparthotel'.
- 5.49 Estimates of jobs for this scheme are included in Section 8.0. Further phases of Blackpool Central could provide:
- A major public event's square for live events
 - Three indoor entertainment centres
 - Hotel

- Restaurants
 - Additional leisure and hospitality space.
- 5.50 A related project has been the investment of £4.5 million of Town Deal funding into Blackpool Illuminations. This supports infrastructure investment including interactive exhibits. The Illuminations will also run to January now.
- 5.51 Blackpool has a wider Town Deal Programme of £40.5 million which is being invested in the following projects:
- The Platform (Youth Hub) - £500,000 in investment
 - Blackpool Illuminations - £4.5 million of £13.2 million total
 - Blackpool Central courts relocation to support the Blackpool Central project - £7 million of £47 million total
 - Revoe Community Sports Village, supporting Blackpool Football Club - £6.5 million of £23.5 million total
 - Blackpool Airport Enterprise Zone - £7.5 million in infrastructure investment of £23.9 million total
 - Multiversity - £9 million of £65 million total
 - The Edge, Stanley Buildings, a Council owned development for an improved business incubator of 26 pods. Tenders out for contracting on this. 4.5 million of £7 million total (the rest is prudential borrowing by Blackpool Council).
- 5.52 Of the £2 billion Growth and Recovery Programme, £830 million in investments has been completed over the last decade, with another £1 billion in recent investments completed or underway. £136.7 million in public funding has been received to support these investments.
- 5.53 The main barriers to this growth, identified by stakeholders include a lack of joined up working between local and national government agencies, which is making planning for and implementing development more difficult, as there is less confidence in public sector plans for change and investment. Skills investment is needed to allow the local population to capitalise on opportunities. It is also argued that more extensive marketing is needed to bring in private sector investment to reduce dependence on public investment. Finally, the lack of available land, for all use types, limits what can be developed to support economic growth.

Fylde

5.54 Comments on specific employment sites and employment areas are included in Section 6.0. In terms of other regeneration investment:

- *St Annes* – The St Annes Masterplan, discussed in Section 2.0, developed 5-6 conceptual projects. These fed into a bid for £14 million in Levelling Up funding. This was unsuccessful, and the Council is considering alternative options to deliver the Masterplan. However, Fylde Council do have £1.5 million (provisional figure) in Council/Shared Prosperity Funding, which will deliver a new open event space in St Annes. This is a project within the Masterplan.
- *Kirkham* – A successful town with few vacant commercial units. There has been considerable public investment through a successful bid to the Future High Street Fund and Heritage Action Zone. Match funding for the ‘Kirkham Futures’ programme was provided by LCC, Fylde Council and Kirkham Town Council, proving a total of £9 million of public investment in the town. As part of this investment, Fylde Council have acquired the former Charity Girls School (former TSB), which is being marketed as a restaurant. A use is also being sought for the Council-owned former Hillside Restaurant and Night Club Site. There is also a private sector proposal for office space, hot desking, in a former bank building, 6-8 Freckleton Street.
- *Lytham* – Will benefit from a £1.1 million public realm project for surfacing, tree planting and new lighting columns, comprising £800,000 from Fylde Council and £350,000 from UK Shared Prosperity Funding.
- *Warton* – Approximately £300,000 in funds through Section 106, Parish Council, etc. to undertake a village centre public realm phased project led by Fylde Council (under construction).
- *Rural Economy* – Fylde Council also has £2.6 million of UK Shared Prosperity Funds for Town Centre regeneration projects, supporting local businesses and projects supporting people and skills. The money has to be spent by 31st March 2025.

Wyre

5.55 Comments on specific employment sites and employment areas are included in Section 6.0. In terms of other regeneration investment:

- Wyre Council has £3.9 million of UK Shared Prosperity Fund. The UKSPF Investment Plan supports strategic business recovery in key economic centres and a range of projects focused on communities and place; supporting local business; and people and skills.

- *Fleetwood* – A regeneration framework for Fleetwood was published in 2023 and outlines projects and interventions being considered to improve the town over the next 20 years. Town centre investment is focused at Fleetwood Market which has funding to broaden the offer and appeal, part of a Heritage Action Project. Adjacent properties are now receiving grants for shop front improvement, public realm and delivery of a pocket park. A seafront masterplan and feasibility study is underway, focused around the Marine Hall to consider the changing offer for leisure attractions, event and conference space as well as office accommodation. At Fleetwood Port, Wyre Council worked with owner ABP to complete Project Neptune (Fish Park), facilities for ten fish processing businesses at the Port. A masterplan for the Port is also being considered. It was hoped that Fleetwood would benefit from a Round One, Levelling Up Fund bid. However, the town was not ultimately successful in this bid and, as a result, plans are on hold.
- Generally, Fleetwood suffers from not having a Further Education College, or similar facility locally which would bring in the student footfall, only having the Nautical College. It also has a limited office offer apart from NHS Pension Service operations and the Fisherman's Friend HQ. Given the lack of these facilities, stakeholders feel that tourism and retail are the main ways to achieve growth. They would like Fleetwood to copy New Brighton in the Wirral, a similarly isolated seaside town which has still built a good offer of local leisure and retail facilities to draw in the visitors.
- Some stakeholders feel the tram service is tired and dated and could benefit from investment, as could Fleetwood's Marine Hall. Generally, the core attractions of the town – the coast, Freeport and Market – need to be better linked together and marketed.
- ABP also has a lot of unused land at Fleetwood which could support future leisure growth.
- *Thornton Cleveleys* – Regeneration Framework in place for Cleveleys, focused on public realm and pedestrian connection improvements plus some investment in the High Street. No plans for office development.
- *Poulton-le-Fylde* – Town Centre Framework in place. Poulton Industrial Estate is fully developed but attracting further demand. Stakeholders would like to see it expand but it is on the edge of countryside, located in flood zone three and growth would go into Fylde Borough so not clear if this is achievable.
- *Garstang* – Town Centre Framework in place, focused on public realm and pedestrian connection investments, as well as supporting community groups and arts events. The Brockholes Arms Auction Mart and Leach Structural Steel located at Catterall have been growing over the last decade, including new car parking and sales facilities at the Auction Mart and extension to steel fabrication plant at Leach. Land earmarked for

further growth but plans not being brought forward at present, something discussed further in Section 6.0.

- *Rural Area* – Wyre was allocated £400,000 through the Rural England Prosperity Fund, aimed at farm diversification and SMEs. Wyre Council have agreed two grants with plans for the conversion of two unused stables into two employment units to let and a purchase of new machinery to support an existing cheese producer to double production and create new jobs. Each grant will need to be spent by March 2025. The grant is for 40 percent of project costs, with £20,000 as the minimum grant and £100,000 the average.

SKILLS

Skills Needs, Skills Gaps and Skills Improvement Prospects

- 5.56 Discussions have been undertaken with the main higher and further education facilities, relevant to the Fylde Coast. Table 51 provides an overview of those institutions and how they support business activity and entrepreneurship.
- 5.57 Stakeholders were consulted on skills gaps in the Fylde Coast. Responses largely echo the Lancashire Local Skills Improvement Plan (2022), that while there are shortages in all sectors, from factory floor workers up to managers, the main shortages are in manufacturing/engineering; construction; health and social care; transport and distribution; hospitality, leisure and tourism; and IT and Digital. Shortages in these areas are considered in more detail in Table 52. The Pandemic has made the situation worse by taking a lot of staff out of the workplace and changing worker expectations, but the problem predates it.
- 5.58 It was noted that, as shown in Section 2.0, skills levels have improved in the Fylde Coast, particularly at degree level (NVQ Level 4). The most significant gaps are now felt to be in mid-level positions, in the above sectors, which don't always require a University degree.
- 5.59 One significant cause is that key business administrative skills are not being taught in schools and colleges. Manufacturing, engineering and communication skills are also not being taught.
- 5.60 Overall, it was noted that larger companies are actively addressing their ongoing skills needs. For smaller firms, which lack that capacity, as noted in the Lancashire Local Skills Improvement Plan (2022), there is a need for new shorter courses, by Higher/Further Education institutions reacting to upskilling needs and changing employer requirements. It

is difficult for employers to commit to courses such as apprenticeships, for at least one year, when there are only one or two elements that are relevant to the employee's role.

Table 51 – Education Institutions Overview

Institution	Overall Relevant Activities	Activities in the Fylde Coast
Higher Education		
Lancaster University	<p>18-20,000 students at the Bailrigg Campus. Also, co-founded University 92 in Old Trafford, Greater Manchester and have an international presence in Ghana, Leipzig, Beijing and Malaysia.</p> <p>Lancaster University has strengths in management, medicine, linguistics, sociology. It provided the first bachelor's degree in cyber security. Lancaster was part of the team behind the bid to locate the National Cyber Force (NCF) in the Samlesbury Enterprise Zone. NCF is investing £5 billion in local facilities and will employ 5,000 people. The location of the NCF in Samlesbury will bring an estimated 30-40,000 jobs to the North West region.</p> <p>Lancaster University also provide innovation support for SMEs, providing £6 million/year worth of support in areas such as leadership and innovation in production. However, 90 percent of the funding for this came from the ERDF which recently ended. Now they only have some £120,000 from the UKSPF to support investment.</p> <p>In terms of incubator space, they have DISH in Manchester, Infolab 21, in Lancaster along with the Environment Centre, cTAP. Lancaster do not operate any facilities on the Fylde Coast.</p> <p>The University does not provide many degree apprenticeships and professional training courses. They do, however, train social workers, providing NHS management training and have provided the first cyber executive MBA programme.</p>	<p>Lancaster has a partnership with Blackpool and Fylde College, has done for around 30 years. Blackpool and Fylde College is the largest college provider of degree-level education with over 55 degrees offered, in all areas of science and humanities, with support from Lancaster University and offer a diverse range of courses from Human Resources to Human Biosciences.</p>
UCLan	<p>Accommodates 35,000 students across four campuses, 28,000 in Preston. No facilities in the Fylde Coast but do own Training 2000 a company with an Accounting Training Centre in Blackpool.</p> <p>In terms of business support, UCLan were running 16 support programmes with EU Funding, but that funding ceased in June 2023. It is looking for</p>	<p>Activities on the Fylde Coast include:</p> <ul style="list-style-type: none"> • The School of Architecture work on community projects in Fylde Coast • Work with BAE in business to business training/support at Warton, Samlesbury and Barrow. Have a sub-contract for training providing apprenticeships in areas such as software engineering, aerospace engineering and maintenance.

Institution	Overall Relevant Activities	Activities in the Fylde Coast
	<p>replacement funding but only expect to continue around half of those programmes.</p> <p>Physical facilities include the Propeller Hub, dedicated serviced workspace offered by UCLan's Centre for SME and Enterprise Development, based within the Media Factory, Preston. Includes hot desking, rent a desk and meeting rooms. In the last five years this facility has supported over 2,000 people through workshops, mentoring, space rental, networking, competitions, and other activities. Within the last three years it has supported 200 businesses, 152 of which the facility helped to start. Other facilities in Burnley (Landmark) and Lancaster (Frasier House). Changing working practices in the office sector are increasing demand for serviced business space, for example from big businesses whose staff mostly work from home and have to come together on a semi-regular basis.</p> <p>Also offer an Online Fast Track to business, supporting self-employment and business start-up in areas like sales and Help to Grow, a course to develop business skills and business planning for SMEs. It is 90 percent government funded.</p>	<ul style="list-style-type: none"> • Work with One Fylde on skills and training. One Fylde works with people with learning disabilities across the Fylde Coast. <p>Offer a wide range of Degree Apprenticeships. On the Fylde Coast, its largest apprenticeship programme is at Blackpool Teaching Hospital with 274 learners.</p>
Further Education		
<p>Blackpool and Fylde College</p>	<p>Has 10,000-12,000 Students overall. Don't provide business start-up space. Have considered this but have no surplus premises to achieve it.</p>	<p>Six facilities in the Fylde Coast:</p> <ul style="list-style-type: none"> • <i>Fleetwood Campus</i> – Includes halls of residence, main campus, 4 metre training pool (for maritime training) and a mechanical engineering centre. Also have the Fireguard facility, containers on a plot of land used for fire safety training and a platform on the River Wyre for lifeboat training. The Campus accommodates 1,000 students at any one time. There are plans to redevelop one hall of residence and develop car parking. Looking to expand various teaching buildings. • <i>Main Campus Bispham Road, Blackpool</i> • <i>University Centre, Park Road, Blackpool</i> – Uses to be relocated to the Multiversity Campus as discussed above • <i>Gateway, Park Road, Blackpool</i>

Institution	Overall Relevant Activities	Activities in the Fylde Coast
		<ul style="list-style-type: none"> • <i>Lancashire Energy HQ, Squires Gate, Blackpool</i> – Apprenticeship training, particularly for BAE. Apprenticeships on energy engineering. • Rent space at <i>Blackpool FC Stadium</i> on a seasonal basis for English language training and Access to Learning courses for foreign students and local communities respectively.
Myerscough College	<p>A specialist land and sports college in a main campus off the A6 in Bilsborrow, Wyre. Have other campuses in Blackpool, Ullswater and Warrington. Have 6,000 students of which 3,000 are in the A6 site. Students can be full time, part time or in apprenticeships delivered solely off site, e.g., have sports turf management courses delivered solely at sports grounds across the UK. Don't do A-Levels, just vocational courses for 16-18 year olds, mostly working with SMEs across the UK.</p>	<p>Bilsborrow Site Comprises 60,000 sqm of space including residential blocks, core educational facilities, three covered equine areas. Own 304 ha of farmland in the area and two working farms. It is identified in the Wyre Local Plan as an educational institution in open countryside with options for growth for core uses. Have a masterplan for growth but the focus is on refurbishment of existing buildings rather than new development. With most staff and students undertaking hybrid working post the Covid-19 Pandemic, the College have no unmet space requirements. Have dedicated bus services for students from Preston and Blackpool (inc. Lytham and Fleetwood), plus a shuttle bus service along the A6.</p> <p>Business Incubator Had an NWDA Rural Incubator in 2000 providing offices for start-ups. It soon became clear that workshops were needed as well. That has now ended. Had a couple of legacy businesses in the College from that until recently, but these have now gone. No plans to do this again but get approached by lots of rural businesses for space. Don't have any surplus space to let.</p> <p>Training Provide a range of training courses supporting public sector activities.</p>
AFC Fylde, Mill Farm, Wesham	<p>The AFC Fylde, Mill Farm facility includes the Fylde Sports and Education Centre, which provides multiple 3G football pitches, a hockey pitch and indoor facilities.</p>	<p>A range of short courses are provided from the Fylde Sports and Education Centre as well as BTEC courses in sports management and a foundation degree in sports development.</p> <p>The AFC Fylde Community Foundation also deliver a UK Shared Prosperity Fund apprenticeship programme which puts applicants in</p>

Institution	Overall Relevant Activities	Activities in the Fylde Coast
		touch with a further education provider and find appropriate courses. It also delivers several more UK Shared Prosperity Fund projects under People and Skills which can involve assisting individuals to access further education courses (with the courses themselves delivered by other providers).

Source: Various, 2024

Table 52 – Skills Gaps

Sector	Detailed Gaps ⁴¹	Comments and Issues to Address
Manufacturing and Engineering	Shortages are in skilled technical sectors, and associated data analysis and procurement.	<p>The Fylde Coast has a strong base of trained staff in the aerospace sector, reflecting the prominence of BAE Warton in the sub-region, but gaps in many other sectors. Larger businesses have long accepted this and are pro-actively working with colleges to train up staff on their relevant specialisms. Smaller businesses can't do this though, making skills shortages harder to address and potentially impacting on growth.</p> <p>As was shown in Section 2.0, manufacturing employment is in decline, but this reflects increasing productivity and technical complexity in production operations. This generates a need for continuous upskilling that businesses and educational institutions struggle to match.</p> <p>There is a need to build up apprenticeships to meet forward needs in 5 plus years, but in practice a lot of companies don't know what skills they will need in advance as requirements will be driven by the contracts they win. There is a need to work with partners to understand and build up supply chain resilience.</p>
Construction	Skilled technical roles, such as plumbers and electricians, site managers and Quantity Surveyors.	As was noted in Section 2.0, most businesses in this sector, on the Fylde Coast, are micro firms or sole traders who operate as contractors on larger schemes. Such micro/single person businesses will frequently lack the time and resources to invest in skills development, particularly if they are dependent on uncertain contractual work. People are also unaware of the more technical roles available in this sector, e.g., digital design and Quantity Surveyors.
Health and Social Care	Healthcare assistants, nursing staff and adult social care roles.	As was noted in Section 2.0, the Health and Social Care sector has grown significantly over the last decade and is forecast to grow further. In addition to specific health sector investments, this

⁴¹ Summarised from the Lancashire Local Skills Improvement Plan (2022)

Sector	Detailed Gaps ⁴¹	Comments and Issues to Address
		reflects an ageing population in the Fylde Coast which is increasing demand for nursing and care staff. Against this need, stakeholders report significant recruitment problems, particularly in social care roles which are less attractive to young people, particularly as such roles are known for their high stress, low pay and long hours.
Transport and Distribution	Drivers, technicians and transport managers, alongside warehouse operatives.	The Transport and Distribution sector, in the Fylde Coast, is focused into short-distance 'Final Mile' activities rather than strategic logistics. Nationally, there is a shortage of HGV drivers. This reflects the difficulty in attracting staff, to a career with a reputation for low pay, long hours and difficult conditions. It also reflects changing Driving Licence regulations which make it harder and more expensive to upgrade to an HGV Licence. Larger haulage companies have created their own training courses for drivers, while strategic logistics companies also train their own staff. However, larger firms have a limited presence on the Fylde Coast.
Hospitality, Leisure and Tourism	Catering assistants and waiting staff, hospitality managers, administration and marketing roles	A strong sector in Blackpool. It lost a lot of staff during the Covid period, although retaining staff in the long term has always been difficult. A lot of employment in Blackpool is also seasonal, which also makes long term retention of staff difficult. It is noted that one focus of regeneration investments in Central Blackpool is to move the leisure economy away from seasonal work.
IT and Digital	Software engineers and developers, cyber security roles.	Locations across Lancashire are competing for high skilled workers. The National Cyber Force development at Samlesbury will generate several thousand new jobs, but there is a lack of trained workers on the Fylde Coast which would allow the subregion to benefit from this. Traditionally, local ICT workers have left for the cities. Covid mitigated this somewhat but still an issue.

Source: Various, 2023

SUMMARY

- 5.61 The Fylde Coast has been less successful at attracting inward investment than some other parts of Lancashire, even in the Enterprise Zones. When they occur, inward investments to the Fylde Coast come from the medical, metal processing and food and drink sectors. Requirements for the Fylde Coast are typically for 1,000-7,000 sqm units on motorway accessible sites, of which there is a shortage. There is also a lack of smaller business hubs which could accommodate support personnel or decentralised or hybrid workers from large companies.
- 5.62 In terms of existing occupiers, despite the macro-economic constraints of 2023, large industrial businesses are planning for growth which is generating property requirements of 5,000-30,000 sqm, albeit not always in a single property. As units of this size range are not readily available in the Fylde Coast many companies are looking to fund development to meet their own needs. However, opportunities to fulfil these requirements have varied, meaning that a number of firms have struggled to find the available, unconstrained land (sites of up to 7.5 ha) they need to meet their requirements, in the areas in which they operate. Sites with immediate access to the M55 are most favoured, including Blackpool Airport Enterprise Zone, Whitehills, Kirkham/Wesham and to a lesser degree sites at Thornton Cleveleys and Poulton-le-Fylde.
- 5.63 The office firms contacted report longer term growth plans which will generate property requirements of up to 3,000 sqm over the period to 2042. Although office businesses have increasingly embraced hybrid working practices since 2020, steady staff growth will still generate office space needs over time. Again, office spaces in this size range are rarely available locally and businesses have been proactive in securing space when it becomes available. Offices with good links to the M55 Corridor as well as in Lytham and St Annes are most desirable.
- 5.64 Blackpool Airport Enterprise Zone has been a focus for investment by local industrial firms, both micro firms seeking sub 500 sqm units and larger firms investing in units of 3,000-4,000 sqm each. Given the lack of growth opportunities for larger industrial and warehouse businesses, elsewhere in Blackpool and the Fylde Coast, a key development moving forward will be the Eastern Gateway site. Blackpool Airport Enterprise Zone is also a focus for office market activity in the Fylde Coast, along with Whitehills. Viability issues mean that the delivery of new offices, by the private sector, is very unlikely anywhere on the Fylde Coast in the short-medium term and the public sector led Knowledge Quarter (Silicone Sands) proposal is the main opportunity for office development on the Fylde Coast.

- 5.65 The Hillhouse Enterprise Zone has mostly seen investment from micro-small local industrial/warehouse businesses and energy sector infrastructure. This trend is expected to continue in the future. Over 2024 a new masterplan is being produced for the Enterprise Zone, which will update the 2018 Masterplan. As was the case in 2018, the new Masterplan is expected to propose the bulk of the available land for energy / sui generis development with a focus on chemical and energy generation.
- 5.66 The Lancashire Enterprise Zone site at Warton remains in the exclusive use of BAE, so there are no companies occupying the area that are not directly part of BAE operations. With all land at the Samlesbury Enterprise Zone now developed or identified for the new National Cyber Force Campus, the emphasis of further development will move to Warton in the future. Over 2023/2024 a new masterplan is being produced for the Warton Enterprise Zone. As was the case in 2014, the new Masterplan is expected to propose the bulk of the available land for E(g)/B-Class development, with a focus on aerospace and advanced manufacturing activities.
- 5.67 In terms of Town Centre Regeneration in Blackpool, the goal is to increase visits and footfall in Blackpool Town Centre and replace seasonal activity with year round leisure activity. At present, only 40 percent of visitors to Blackpool access the Town Centre. The primary projects are the Talbot Gateway and Blackpool Central, which are key parts of a £2 billion investment programme.
- 5.68 In Fylde Borough, the larger investments of the St Annes Masterplan are on hold following an unsuccessful £14 million levelling up funding bid. Smaller investments are progressing in St Annes and Kirkham, however.
- 5.69 In Wyre Borough, Fleetwood suffers from not having a Further Education College, or similar facility locally which would bring in the student footfall, with the exception of the Nautical College. It also has a limited office offer apart from NHS Pension services operations and the Fisherman's Friend HQ. Given the lack of these facilities, stakeholders feel that tourism and retail are the main ways to achieve growth. Regeneration investment in the other settlements of Wyre generally comprises smaller scale town centre focused projects.
- 5.70 Stakeholders were consulted on skills gaps in the Fylde Coast. Responses largely echo the Lancashire Local Skills Improvement Plan (2022), that while there are shortages in all sectors, from factory floor workers up to managers, the main shortages are in manufacturing/engineering; construction; health and social care; transport and distribution;

hospitality, leisure and tourism; and IT and Digital. One key cause is that key business admin skills are not being taught in schools and colleges. Manufacturing, engineering and communication skills are also not being taught.

- 5.71 Overall, it was noted that larger companies are actively addressing their ongoing skills needs. For smaller firms, which lack that capacity, there is a need for new, shorter courses, reacting to upskilling needs and changing employer requirements.

6.0 FYLDE COAST FUNCTIONAL ECONOMIC MARKET AREA

INTRODUCTION

6.1 This section defines and reviews the Fylde Coast's role in the wider economy of the North West. It provides a definition and quantitative review of the Fylde Coast Functional Economic Market Area (FEMA).

Guidance on FEMA Definition

6.2 Paragraph 19 of the Planning Practice Guidance Note '*Plan-making*' (2021) identifies that; *"Since patterns of economic activity vary from place to place, there is no standard approach to defining a functional economic market area, however, it is possible to define them taking account of factors including:*

- *extent of any Local Enterprise Partnership within the area*
- *travel to work areas*
- *housing market area*
- *flow of goods, services and information within the local economy*
- *service market for consumers*
- *administrative area*
- *catchment areas of facilities providing cultural and social well-being*
- *transport network."*

6.3 All definitions of the FEMA are approximations of the interrelationships of a local economy with areas outside the local authority. Analysis cannot account for all relationships in the economy, rather it is a representation of the key economic, workforce and consumer flows for the local economy.

ANALYSIS

Local Enterprise Partnership

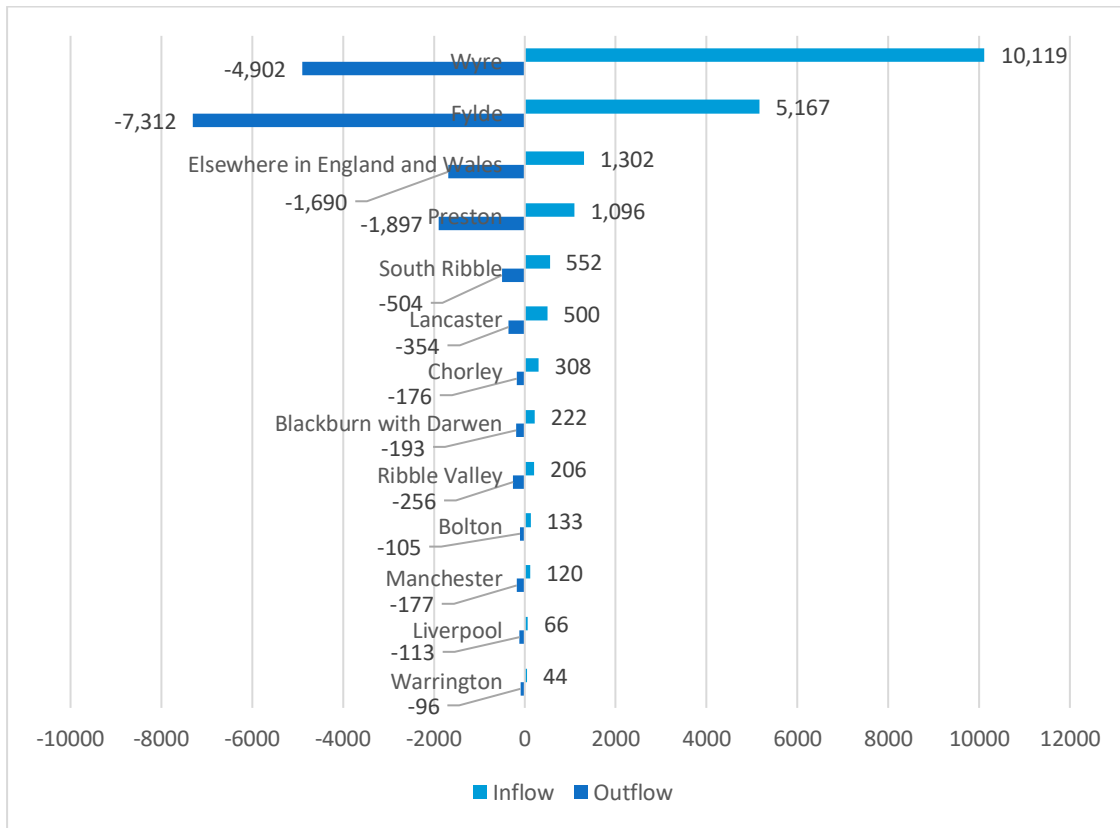
6.4 All three Fylde Coast local authorities fall within the Lancashire LEP. This reflects the Fylde Coast's established role as a defined sub-region within the county, but also very significant economic interrelationships as is shown in the commuting data below. This has been expressed in a range of cross boundary programmes and projects within the LEP Area. Examples of this include the Lancashire Enterprise Zone which takes in the BAE facilities of Warton in Fylde and Samlesbury in South Ribble and Ribble Valley. Additionally, the emerging Lancashire 2050 programme which seeks to promote key strategic sites from across the LEP area for national government support.

- 6.5 Alongside the LEP, a Fylde Coast Economic Prosperity Board was established in May 2018 to bring together local authority partners in a formally constituted arrangement to help shape and drive economic development across the Fylde Coast.

Travel to Work Area

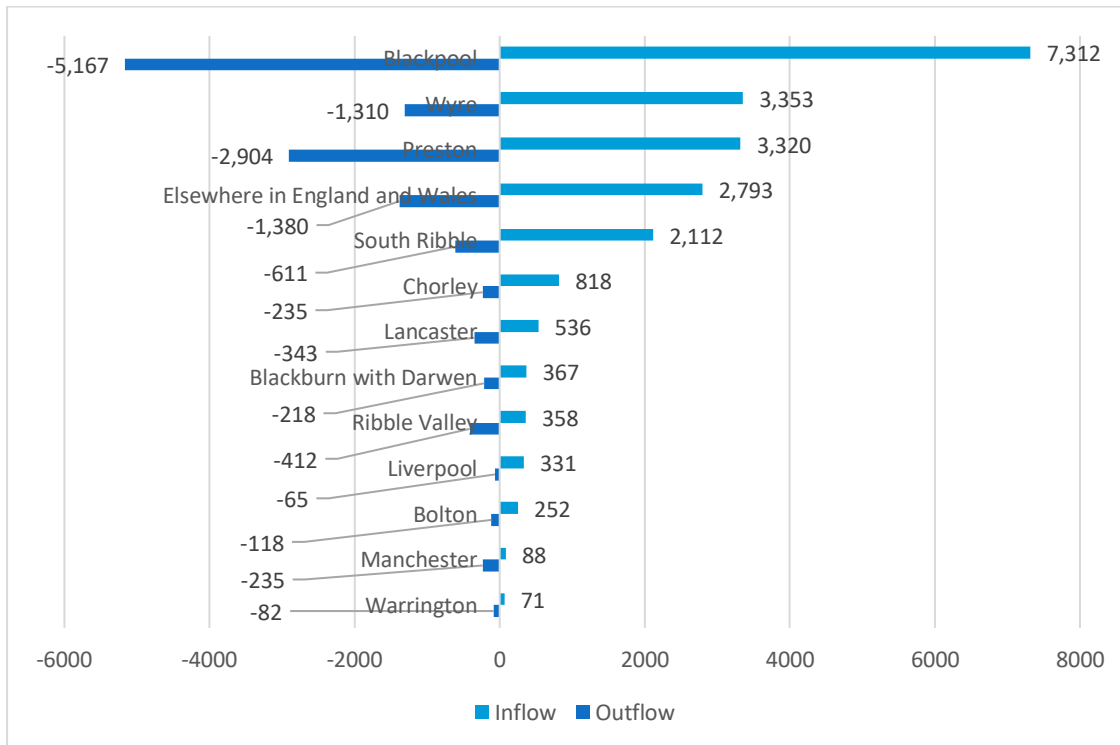
- 6.6 The commuting patterns of the working residents of the Fylde Coast and the workforce employed in the three local authority areas are important in understanding the housing and employment role of the Fylde Coast in the context of the broader sub-region. This has implications for the definition and understanding of the Fylde Coast FEMA.
- 6.7 Figures 38 to 40 summarise the in and out commuting patterns of Blackpool, Fylde and Wyre at the time of the 2011 Census. At the time of writing detailed commuting statistics from the 2021 Census were not available. However, what is worth highlighting is that the 2021 commuting data is expected to be skewed by the Covid-19 Pandemic and related lockdowns that were ongoing in 2021 and which encouraged far greater levels of homeworking than might have occurred naturally. Accordingly, the older 2011 Census data is used for this exercise and the figures given below should be taken as indicative of wider patterns rather than definitive.
- 6.8 It should also be noted that commuting figures (i.e. day to day movement of workers) shown here are distinct from the migration figures (i.e. permanent relocation of individuals) discussed in Section 2.0.
- 6.9 Overall, in 2011 at least, Blackpool and Fylde were net importers of labour, net gains of 1,826 and 8,474 workers respectively, while Wyre was a sizeable exporter, with a net loss of -10,821. Between the three Fylde Coast authorities, Blackpool was a net importer from Wyre (+5,217 workers) but an exporter of labour to Fylde (-2,145 workers). Fylde was an importer of labour from both its neighbours and Wyre an exporter to both.

Figure 38 – In and Outflows of Fylde Coast Commuters – Blackpool



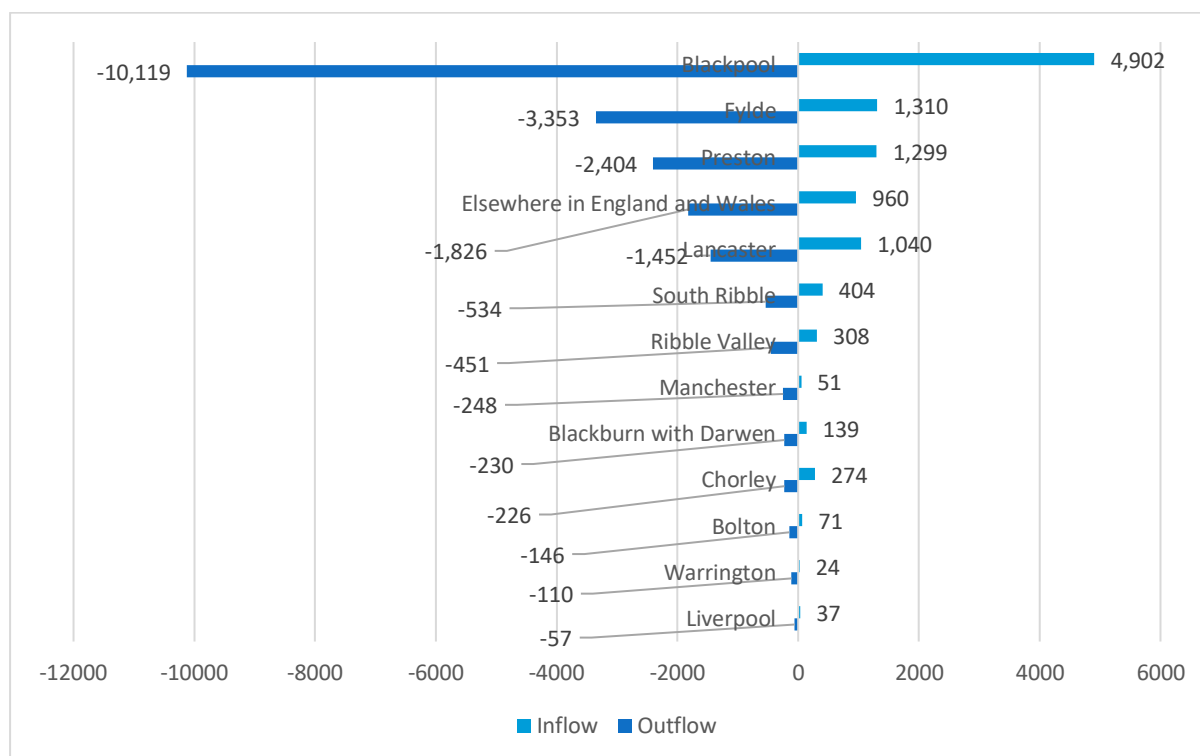
Source: ONS 2011 Census

Figure 39 – In and Outflows of Fylde Coast Commuters - Fylde



Source: ONS 2011 Census

Figure 40 – In and Outflows of Fylde Coast Commuters - Wyre



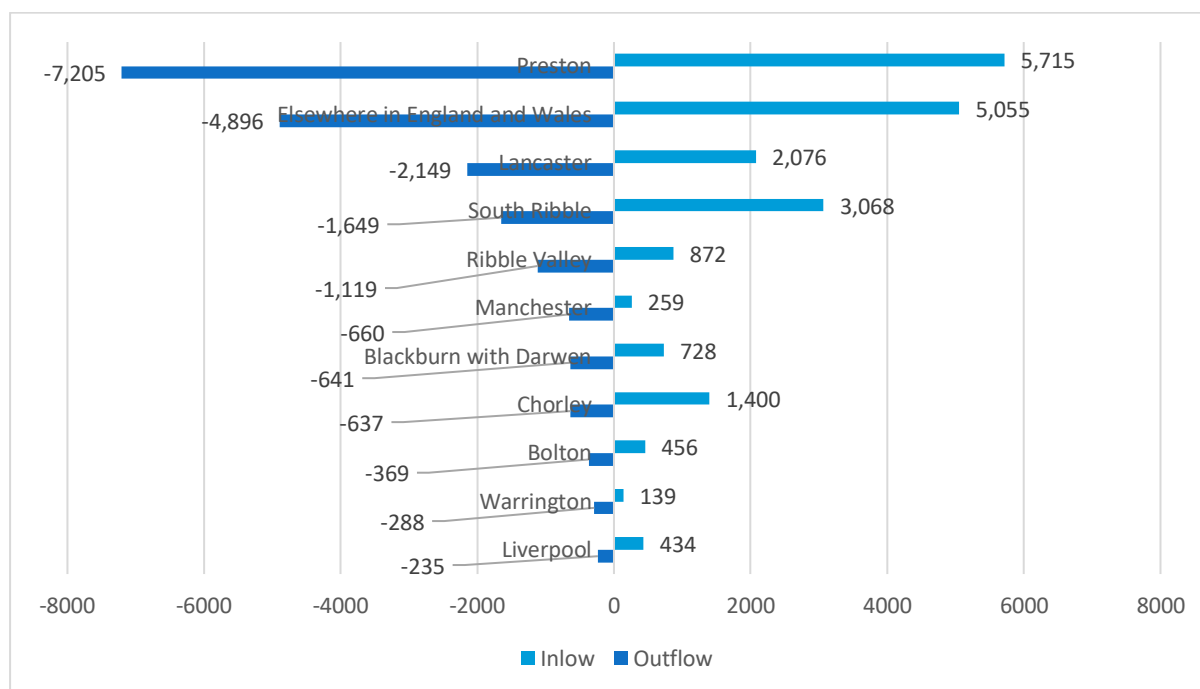
Source: ONS 2011 Census

6.10 When considering the Fylde Coast’s combined relationship to other local authority areas, as shown in Figure 41 and Table 53, the Fylde Coast had a positive net flow of workers (i.e., many more workers commuting into the sub-region than out of it to/from an area) with South Ribble. Most of that gain, a net change of +1,501 workers in 2011, was with Fylde Borough which is unsurprising as Fylde has the most direct road links with South Ribble and contains a number of major employers which will draw labour from Central Lancashire. Additionally, there will be labour links between the BAE facilities at Warton (Fylde) and Samlesbury (mostly within South Ribble) with roles moving between the two as differing aerospace production contracts are implemented.

6.11 The Fylde Coast was also a net importer from Chorley, again with the inflow focused on Fylde Borough, and the City of Liverpool, along with Blackburn with Darwen and Bolton.

6.12 By far the largest negative flows (i.e., more residents going out of the sub-region to work than coming in) was with Preston. The biggest individual exporter of labour to the city was Wyre (-1,105 net change), reflecting linkages along the A6 Corridor and the attraction of major employers. Fylde by comparison was a net importer of labour from the city (+416 net change). The Fylde Coast was net exporter of labour to Lancaster, Ribble Valley and Manchester.

Figure 41 – Inflows and Outflows of Fylde Coast Commuters – Combined Fylde Coast Totals



Source: ONS 2011 Census

Table 53 – In and Outflows of Fylde Coast Commuters – Combined Fylde Coast Totals, Net Change

Settlement	Net Flow of Workers into Fylde Coast
Preston	-1,490
South Ribble	1,419
Lancaster	-73
Ribble Valley	-247
Blackburn with Darwen	87
Manchester	-401
Chorley	763
Liverpool	199
Bolton	87
Warrington	-149
Elsewhere in England and Wales	159
Total	354

Source: ONS 2011 Census

- 6.13 Overall, the Fylde Coast had strong economic linkages – which can be defined as more than 1,000 commuter movements, in and out of the sub-region, to or from that location – with the three Central Lancashire authorities of Chorley, Preston and South Ribble. 19,674 commuter movements were recorded between the Fylde Coast and Central Lancashire in 2011. Strong links can also be observed between Lancaster and the Fylde Coast, 4,225 movements in 2011, Ribble Valley (1,991 movements) and Blackburn with Darwen (1,369 movements).

Housing Market Area

- 6.14 Housing Market Assessments can be useful in defining FEMAs as they review population and travel to work/migration patterns to understand defined areas of economic activity, which inform housing market area geographies.
- 6.15 Fylde and Wyre Councils have produced various housing evidence base documents in recent years which only cover the housing markets within those local authority areas. In 2014 a joint Fylde Coast Strategic Housing Market Assessment (SHMA) was published, which covered the whole Fylde Coast sub-region and in Section 3.0, provided *“A Review of the Housing Market Area Geography”*.
- 6.16 At Paragraph 3.28 the Fylde Coast SHMA identified that *“the three authorities making up the Fylde Coast area operate as a relatively strong and distinct housing market area. There is a high level of self-containment with regards flows of commuters and the movement of people shows relatively limited flows with surrounding authorities.”*
- 6.17 In terms of linkages beyond the Fylde Coast sub-region Paragraph 3.29 of the Joint SHMA noted that *“In terms of connections to surrounding areas, the analysis of commuting and migration patterns suggest that the Fylde Coast share the strongest relationships with Preston and Lancaster. Individual authorities within the Fylde Coast also have comparatively established relationships with South Ribble, Pendle and Manchester.”*
- 6.18 Notwithstanding those wider links, however, the overall conclusion of the Joint SHMA was that *“The high levels of containment in the Fylde Coast do however support the consideration of objectively assessed needs and demands for housing within this geography, recognising the evidenced linkages with a number of surrounding authorities”* (Paragraph 3.30).

Services and Infrastructure

- 6.19 Key cross boundary road links include the M55 and A583 which connect Blackpool, the main settlements of Fylde District and, more indirectly, via the A582, the main settlements of Wyre to Preston and the M6 Corridor. The A6 also links the eastern settlements of Wyre to Lancaster in the north and Preston in the south although this corridor is arguably more peripheral to the rest of the Fylde Coast.
- 6.20 The Blackpool North Railway Station provides links between Blackpool and a range of destinations but most frequently it links the Fylde Coast to Central Lancashire settlements and Greater Manchester, including Manchester City and Manchester Airport. There are also regular services to Liverpool via Preston, Wigan and St Helens. Some Blackpool North trains also serve Poulton-Le-Fylde in Wyre. More local rail links are also provided from Blackpool South to Preston, including stops in St Annes and Lytham. Kirkham and Wesham Station accommodates services to and from both Blackpool North and Blackpool South. Blackpool, Cleveleys and Fleetwood are also linked by the Blackpool Tramway service.
- 6.21 Rail freight has a limited role on the Fylde Coast, with no active B8 rail freight facilities in the sub region at this time. The Hillhouse Enterprise Zone retains the rail infrastructure to support rail freight activities but, at the time of writing there were no plans to bring forward such uses here. The delivery of significant rail freight uses on the Fylde Coast is unlikely as such strategic facilities prefer to locate at the intersections of the main cross country railway lines and motorways, with strong linkages to major ports, such as the Port of Liverpool.
- 6.22 In terms of services, Blackpool is a significant sub-regional centre, serving the whole Fylde Coast and, in terms of its core leisure and retail offer, the whole UK. Nearby St Annes and Lytham in Fylde Borough, and to a lesser degree Cleveleys and Fleetwood in Wyre, provide a related and complementary tourism offer to Blackpool.

THE FYLDE COAST FEMA

- 6.23 Based on the above evidence, the Fylde Coast's FEMA clearly includes the Central Lancashire local authorities of Chorley, Preston and South Ribble. Nearly 20,000 commuter movements were recorded to and from those locations in 2011. The two sub-regions also benefit from strong road and rail links.
- 6.24 Commuting also showed strong links with Lancaster, which also links well to Wyre along the A6 Corridor, the Ribble Valley, as well as the more distant Blackburn with Darwen.

- 6.25 The Fylde Coast has reasonable linkages, in terms of commuter activity, with the cities of Manchester and Liverpool. However, this will be true for all the local authority areas of Lancashire given the importance of these two cities in the regional economy. Overall, however, the relationship is weaker than with the other locations shown above. The purpose of the FEMA is to consider key economic relationships rather than all possible cross boundary relationships.

NEIGHBOURING AREAS

- 6.26 Having reviewed the FEMA of the Fylde Coast, the remainder of this section considers each of the districts which fall within that FEMA on an individual basis, to understand strategic and cross boundary issues which may impact on the Fylde Coast. In all cases, BE Group consulted with the relevant local authorities on their policy positions as of summer 2023. In the case of Central Lancashire and Blackburn with Darwen, BE Group completed much of the employment land evidence base which informs their emerging Local Plans.

Central Lancashire

Chorley

- 6.27 The Chorley Local Plan 2012 – 2026 Site Allocations and Development Management Policies DPD (2015) allocated 88.74 ha of employment land, to meet overall needs to 2026 of 112 ha. Allocations focused around Buckshaw Village and the Botany Bay/Great Knowley areas, adjoining Junction 8, M61 and the B5252 Euxton Lane Corridor. These locations have been a focus of development in recent years, primarily for local scale light and general industrial premises.
- 6.28 A new Local Plan for the three Authorities of Chorley, Preston and South Ribble is being prepared to cover the period to 2038. It passed the Regulation 18 Consultation stage in late 2022 / early 2023. In 2021-2022, BE Group completed an Employment Land Study for Central Lancashire. Using the forward projection of past employment land take up, needs to 2038 of 76.34 ha were identified for Chorley Borough. Against an existing realistic supply of 56.28 ha, a further requirement of 20.06 ha was noted.
- 6.29 The land which will meet this future need is still subject to ongoing consideration, but there is expected to be a focus again on the area of Buckshaw Village and Junction 8, M61 areas, and adjoining locations in the Chorley settlement area. Stakeholders identify this sub-area as a focus for market activity in Central Lancashire and Buckshaw Village already accommodates facilities for several national employers including Kimberley Clark and GA

Pet Food. Recent growth has been primarily at the local scale however, for light and general industrial premises to meet the requirements of micro and small firms. Such development will meet needs in Central Lancashire but have negligible impacts further afield.

Preston

- 6.30 The Preston Local Plan (2015) allocated 50.44ha of employment land, to meet overall needs to 2026 alongside another 44.93 ha in commitments on allocated sites and 4.15 ha carried forward from previous Local Plans. This helped to meet a total requirement of 118.5 ha to 2026. Allocations focused at North East Preston, around Junction 31a, M6.
- 6.31 The 2022 Central Lancashire ELR identified needs to 2038 of 71.06 ha for Preston. Against an existing realistic supply of 71.31 ha, Preston had a modest supply surplus.
- 6.32 Preston City Centre is an established focus for financial, legal and professional services although a lot of recent office sector development has taken place to the south at South Rings, Bamber Bridge and Walton Summit, locations which fall into South Ribble Borough, but which link strongly to the Preston market area. Preston also has a strong secondary office location at the Riversway Docklands which is located off the A583 route from Preston into the Fylde Coast. Collectively, these locations form a key office market area for Lancashire, which has, and will continue to draw labour from the rest of the county.
- 6.33 Stakeholders report that the prospects for large scale private office sector development remain modest, even in Preston City Centre. Given increasing construction costs, rents of £25/sqft (£269/sqm) are needed to allow the viable development of new offices. At present, prime rents in Preston do not exceed £15/sqft (£161/sqm). This is combined with varying demand for larger office suites following the Covid-19 Pandemic.
- 6.34 In terms of the industrial and warehouse development, growth in Preston has focused on Junction 31a, with a number of recent developments completed and underway. Development is expected to continue to focus in this area, for mostly local scale development, in a location which enjoys reasonable links to the Fylde Coast via the M55/M6 routes, even with the lack of north bound slip roads at Junction 31a. North East Preston may therefore provide some competition to equivalent locations in Blackpool, Fylde and Wyre.
- 6.35 Access between the Fylde Coast and Preston now benefits from the newly opened Junction 2 M55 and associated link road to the A583. This new link will aid access between the Fylde Coast and Central Lancashire. Some employment and mixed use sites have been put

forward through Call for Sites around this new link. However, it has yet to be confirmed if any of these options will be taken forward in the Central Lancashire Local Plan. Growth in North West Preston remains focused on housing and associated services, and the new Link provides greater opportunities for this growing Preston population to access employment opportunities in the Fylde Coast.

South Ribble

- 6.36 The South Ribble Local Plan (2015) allocated 35.40 ha of employment land, to meet overall needs to 2026 of 44.5 ha. Allocations focused around Farington and Lancashire Business Park.
- 6.37 The 2022 Central Lancashire ELR identified needs to 2038 of 77.66 ha for South Ribble Borough. Against an existing realistic supply of 51.98 ha, a further requirement of 25.68 ha was noted.
- 6.38 In addition to a local supply, South Ribble is home to two strategic sites, which will have larger than local impacts – the Cuerden Strategic site and Samlesbury Enterprise Zone.
- 6.39 Now referred to as Lancashire Central, an Outline planning application was submitted, on the Cuerden Strategic Site in August 2022 to LCC (App. No. LCC/2022/0044) by LCC and its development partner Maple Grove Developments (part of the Eric Wright Group). The proposal would provide up to 155,000 sqm of B2/B8 premises, with options for up to 19,000 sqm in offices, in four phased zones alongside retail and leisure facilities and 116 homes. Development is proposed on land under LCC ownership. A further 15.93 ha site to the south, owned by Brookhouse Group could provide 52,385 sqm of B2/B8 uses based on historic planning consents. Maple Grove has indicated that it would be willing to commence the scheme within a year of securing consent.
- 6.40 Assuming delivery, Lancashire Central would provide a substantial new development site for the county, which will compete in the regional and national market for occupiers. At the time of writing, it is unclear if the substantial office element will ultimately come forward, given the viability constraints faced by office developments in the current market. However, if it does, it will meet much of the need for new, larger E(g)(i) uses in Central Lancashire. Given the Preston conurbation's strong links to the Fylde Coast (Cuerden falls within the Preston market area, even though it is outside of the city boundaries) it would also likely take up a portion of the office demand which might otherwise have gone to locations such as Whitehills and Blackpool Airport Enterprise Zone.

- 6.41 The BAE Samlesbury site is linked to BAE Warton as the joint Lancashire Enterprise Zone. To date, all Enterprise Zone related development has been at the Samlesbury site, with a number of schemes completed:
- Access is in place from the A59 and other junction work has been completed
 - The Wincanton Defence Logistics Centre, which is purpose built to support BAE Systems production and through life support programmes. It has a 13,000 sqm footprint and employs 170
 - BAE's 7,400 sqm Academy for Skills and Knowledge (ASK), an apprentice and training facility
 - BAE's 13,000 sqm Asset Management Facility
 - An Advanced Manufacturing Research Centre (AMRC), on Roy Chadwick Way of 4,500 sqm. It is operated as a partnership between BAE and the University of Sheffield to support advanced research and innovation activities in the North West.
- 6.42 In October 2021, it was also announced that the Samlesbury Enterprise Zone will be home to a £5 billion campus for the National Cyber Force. The properties developed will accommodate cyber experts from MI6, GCHQ, the Ministry of Defence and the Defence Science and Technology Laboratory. At the time of writing, no estimates on the number of people which this facility could employ have been made publicly available however, it will inevitably draw in high skilled labour for ICT sectors from across Lancashire.
- 6.43 The size of the buildings for the National Cyber Force Campus, to be developed by 2030, have yet to be agreed but the campus is likely to take up a sizeable area of land within the 35 ha Enterprise Zone. With the Samlesbury Enterprise Zone moving towards capacity, it provides the longer term opportunity for the emphasis of development to move towards Warton and potentially also the Blackpool Airport Enterprise Zone which also has a focus on the aerospace sector.

Pennine Lancashire

Blackburn with Darwen

- 6.44 Blackburn with Darwen's Local Plan was submitted under Regulation 22 to the Secretary of State in August 2022, for Examination in Public (EiP). The EiP Sessions were held over January-March 2023 and a consultation on a Draft Main Modifications Version of the Local Plan was held in October 2023. The employment land OAN is for at least 46.4 ha of new land for employment purposes over the period 2021-37.

- 6.45 To meet this need, a 22.02 ha, in two plots, Junction 5 Strategic Employment Site is proposed, off the M65, which will have larger than local influences. This replaces the now complete Whitebirk scheme (Frontier Park) at Junction 6. As with Frontier Park, the new site would likely focus on the development of larger B2/B8 uses, but the competition it will provide will likely be limited to the M65 Corridor as the plot is not large enough to meet the most extensive regional and national B2/B8 requirements.
- 6.46 The aerospace and advanced flexible materials sectors are considered key within Blackburn with Darwen, and the Borough already contains a number of companies within the BAE Systems supply chain. Stakeholders hope the Borough can attract further companies who are looking to support BAE but are not eligible to locate on the Warton or Samesbury Enterprise Zones directly. Blackburn with Darwen would compete with the Fylde Coast, and Central Lancashire, to attract these businesses.
- 6.47 Elsewhere however, Blackburn with Darwen is felt to be relatively self-contained with retail, leisure, office and industrial markets which are distinct from both Central Lancashire and the Fylde Coast. Blackburn with Darwen's retail and employee catchment area more naturally extends east to Burnley, Hyndburn and Pendle.

Ribble Valley

- 6.48 The Ribble Valley Core Strategy was adopted in 2014 which proposed an extra 8 ha of employment land to 2028. As part of the production of the Housing and Economic Development, Development Plan Document (HED-DPD), a residual requirement of 2.41 ha was identified in order to meet employment land requirements in the period 2008 – 2028. In October 2019 the Council adopted the HED-DPD which identified the following employment land allocations totalling 4 ha, which have now largely been developed.
- 6.49 Ribble Valley Enterprise Park, off the A59 at Clitheroe is identified as the Borough's main established employment area with some 12 ha of land remaining here. Though land at this location has been on the market for some time, there is limited growth in the pipeline. Across Clitheroe, growth is expected to be housing focused.
- 6.50 The 2013 Ribble Valley Employment Land Study Refresh suggested that while the local property market was stable, and some rural businesses were performing very well, there remained an oversupply of both office and industrial property in the Borough. However, stakeholders feel that demand has improved since that time. Clitheroe, Longridge, Whalley and rural schemes are proving increasingly successful in attracting SMEs undertaking

bespoke manufacturing and small-scale warehousing. Such companies are drawn to these locations by the good environmental quality and high standard of living within the area.

- 6.51 Samlesbury Enterprise Zone is a strategic opportunity site which will inevitably benefit all of Lancashire. Enterprise Zone development is focused in South Ribble and is discussed above. Ribble Valley feel that, as with Blackburn with Darwen, it could benefit from supply chain businesses looking to relocate to the area to serve BAE, but who are ineligible to operate from the Enterprise Zone itself.
- 6.52 A new Local Plan is under preparation, although due to staff shortages at the Council, it remains at the Regulation 18 Stage. A new Economic Plan is also subject to consultation. The key themes of both are likely to focus on sustainable change and improving what Ribble Valley has, particularly its strong offer of micro businesses, rather than going for extensive growth which will have cross boundary implications.

Lancaster

- 6.53 The Local Plan for Lancaster, comprising Part One: Strategic Policies and Land Allocations DPD and Part Two: Development Management DPD, was adopted in 2020. The Plan allocates 59.5 ha of employment land in six main locations. Lancaster City Council is now at Examination in Public, undertaking a Climate Emergency Review of the Local Plan, but this will not affect Lancaster's OAN for employment land or the strategic sites put forward to meet needs.

Bailrigg Garden Village

- 6.54 The Local Plan identifies a broad location for growth, south of the city, surrounding the Lancaster University Campus. Some 3,500 homes are proposed alongside 2-8 ha of employment land for offices and high end manufacturing linked to the University, to be informed by a Lancaster South Area Action Plan. Sitting on the A6 Corridor it has the most direct economic links to the Fylde Coast and a high value employment area here may provide competition for equivalent high value facilities on the Fylde Coast, most notably the three Enterprise Zones.
- 6.55 The adopted Local Plan anticipated that the Bailrigg Garden Village, and other development in the south Lancaster area, would be enabled by Housing Infrastructure Fund (HIF) funded infrastructure. However, high inflation of construction costs, over 2021-2023 mean that this £140 million grant will not now be enough to fund the infrastructure required to open up the site. In June 2023 the City Council announced the suspension of further work on the

proposed South Lancaster to M6 transport project.

- 6.56 This decision, which was supported by Lancaster City Council, means that anticipated infrastructure, including the transport infrastructure for the Bailrigg Garden Village, is unlikely to come forward in the short term, and that this will affect the future rate of delivery of key strategic sites. As a result of this, the City Council resolved, in September 2023, to cease work on the Lancaster South Area Action Plan and commence a full Local Plan Review. *“The Review will revisit all strategic planning matters include setting new requirements for housing and employment related development as well as setting out new or revised approaches to addressing climate change, design and the natural environment. It will be for the reviewed Local Plan to determine how [and where] a freshly established housing requirement will be delivered over a new local plan period. The Plan Review process will include the exploration of strategic development distribution options and be informed by “call for sites” and site suitability assessment processes. The currently adopted plan (or the partial Climate Emergency Review of the existing Local Plan if progressed to adoption) will remain the development plan position until the fully reviewed new development plan documents are adopted.”*

Heysham

- 6.57 In terms of Heysham Port, owner Peel Ports have invested in infrastructure to increase the capacity of port operations. There is an enhanced role for logistics and container storage in the existing facilities but no expansion or growth yet. In discussions, the owners of Fleetwood Port report that Heysham Port is the main competing facility for Fleetwood. The established nature of Heysham Port in terms of port trade and ferry activities leaves little scope for the return and growth of such uses in Fleetwood. Growth of the Heysham Port will be supported by investment in employment land at Heysham Gateway for high value B2/B8 uses. A lot of land is under LCC and City Council ownership here allowing the public sector to drive forward development.
- 6.58 In terms of Heysham Power Station, the two reactors are scheduled to close in 2027 and 2031 respectively. There are no firm plans for a third reactor at this stage. Another plan was for Heysham to be a landing stage for power transmission from Sellafield, but it is understood this will not now occur. At the time of writing the firmest proposals were for battery farms and infrastructure for offshore wind farms.

Morecambe

- 6.59 The key investment here will be in the leisure sector. The Eden Project North is consented with £50 million in public funds secured. Plans are being worked up and other funding sought with development expected to start in the next 12 months for mussel shaped bio-domes, educational facilities plus retail and service uses. This will be a competing facility for the Fylde Coast's leisure offer although its exact impact will depend on what complimentary facilities can be brought in alongside it. There are no firm plans for related development at this time, but the City Council reports interest from hotel and self-catering apartment developers and operators.

Lancaster and Wider Links to Fylde Coast

- 6.60 The main E(g)/B-Class opportunity in the city is identified to be the Canal Quarter where a range of Council owned buildings and car parks provide opportunities for retail, housing and employment uses, to be delivered over the next 5-10 years.
- 6.61 Overall, there are reasonable economic linkages between Lancaster District and the Fylde Coast via the M6 and Lancaster Road/A6 Corridor. As noted above, there has been, and remains labour movement between Lancaster and the Fylde Coast, particularly Wyre. However, City Council officers feel that Lancaster has stronger links with Westmorland to the north. A key cross boundary link in the south would be the new Lancaster Auction Mart, including a Rural Business Hub, which is proposed for land at J33, M6. This would serve a cross boundary rural economy extending to include eastern parts of Fylde and Wyre. A planning application for this has been under consideration since 2019 but, at the time of writing, there was disagreement over the amount of retail proposed in the scheme, making a consent uncertain.

SUMMARY

- 6.62 Based on a mix of geographic evidence and commuting data, the FEMA of the Fylde Coast includes all of Central Lancashire and the Pennine Lancashire authorities of Blackburn with Darwen and Ribble Valley, along with Lancaster. The other areas of Lancashire, including West Lancashire, have more limited relationships with the Fylde Coast.
- 6.63 In Chorley Borough, growth has and is expected to continue to focus in the area of Buckshaw Village, around Junction 8, M61 and on connections between the two. This location includes some larger employers including GA Pet Foods but mostly accommodates local businesses with limited larger than local impacts. The M61 Corridor also links more strongly to Greater Manchester than the Fylde Coast.

- 6.64 The Fylde Coast has very strong linkages with Preston, with 12,920 commuter movements recorded between the two locations in 2011. Preston is a long established centre of the office market in Lancashire, both in terms of the City Centre and the associated market area of South Rings/Bamber Bridge of South Ribble. Overall, this will not change, limiting the capacity for private sector office sector growth in the neighbouring Fylde Coast. Significant growth in Preston's office sector is unlikely in the short-medium term, reflecting viability constraints, although such issues will also affect the Fylde Coast.
- 6.65 In recent years, growth in Preston has primarily been for B2/B8 uses in the North East of the City, at Junction 31a, and further growth is possible with consents achieved/being sought at locations such as Red Scar and Roman Way Industrial Estates. Sitting at the opposite end of the M55 Corridor from the Fylde Coast this location will compete with the Fylde Coast for small-medium sized industrial and warehouse requirements, benefitting from its more direct links to the M6 Corridor than the Fylde Coast.
- 6.66 Access between the Fylde Coast and Preston now benefits from the newly opened Junction 2 M55 and associated link road to the A583. This new link will aid access between the Fylde Coast and Central Lancashire. Employment allocations in this area are possible, but at the time of writing none have been confirmed and North West Preston remains a primarily residential area. The growing residential communities here, with improved access west, do provide a labour source for Fylde Coast businesses, however. One particular benefit of this link will be improved access between the two halves of the Lancashire Enterprise Zone, Warton in Fylde Borough and Samlesbury in South Ribble and Ribble Valley.
- 6.67 In South Ribble, consent is being sought for 155,000 sqm of B2/B8 premises, with options for up to 19,000 sqm in offices at the Cuerden Strategic Site or Lancashire Central. The office component would represent a significant investment in new accommodation in Lancashire and would likely draw in businesses from across the County. However, given the viability issues which have affected office development across the region, it is unclear if this aspect of the project will be realised, at least at the scale proposed.
- 6.68 The Samlesbury Enterprise Zone has been the focus for development activity in the wider Lancashire Enterprise Zone, which also includes BAE Warton. Most properties delivered here have been skills and training facilities for BAE. Samlesbury Enterprise Zone will also accommodate a campus for the National Cyber Force, accommodating cyber experts from MI6, GCHQ, the Ministry of Defence and the Defence Science and Technology Laboratory. No estimates on the number of people which this facility could employ have been made

publicly available however, it will inevitably draw in high skilled labour for ICT sectors from across Lancashire and could deprive other locations, such as the Fylde Coast of skilled staff. Conversely, with the development of the Campus, the Samlesbury Enterprise Zone will be close to capacity and the emphasis of development in areas such as aerospace could move more to the Warton and Blackpool Airport Enterprise Zones.

- 6.69 In Blackburn with Darwen, growth is focused on the M65 Corridor which has only limited linkages to the Fylde Coast. The Borough does have an established cluster of aerospace and related engineering businesses and will compete for labour and companies in this area with locations such as Samlesbury, Warton and the Blackpool Airport Enterprise Zone. In the Ribble Valley, future growth is expected to meet local needs only.
- 6.70 Finally, in Lancaster the strategic development with the most cross boundary impact would be Bailrigg Garden Village where some 3,500 homes are proposed alongside 2-8 ha of employment land for offices and high end manufacturing linked to the University, in a location on the A6 Corridor close to the boundary with the Fylde Coast. A high value business park here, benefiting from links to a university, would compete for high tech businesses with locations including Blackpool Airport Enterprise Zone. However, infrastructure funding for this project is no longer available and the Garden Village, along with other projects, is now subject to a full review of the Lancaster Local Plan which may restructure how Lancaster's housing and employment land needs will be met.
- 6.71 Heysham Port is the main competing facility for Fleetwood and its continued growth is expected to limit options for port related facilities in Fleetwood. Finally, at Morecambe, Eden Project North will represent a new leisure attraction for Lancashire, competing with Blackpool attractions although its longer term impact will likely be dependent on how much of an associated hotel, hot food and ancillary leisure offer it can attract to Morecambe.
- 6.72 In summary, the proposals with the most potential for cross boundary impact in the Fylde Coast FEMA are in South Ribble. At the Samlesbury Enterprise Zone, the National Cyber Force Campus would, in the short term, be a significant draw for skilled labour from other parts of Lancashire. In the long term, however, with the Samlesbury Enterprise Zone increasingly at capacity opportunities for growth improve at the Warton and Blackpool Airport Enterprise Zones. The delivery of 19,000 sqm in offices at the Cuerden Strategic Site would also impact demand for office space across the county although, at the time of writing it is unclear if viability constraints would allow the delivery of E(g)(i) accommodation at this scale.

7.0 EMPLOYMENT LAND ASSESSMENT – EXISTING LAND SUPPLY

INTRODUCTION

- 7.1 This section looks at the portfolio of employment land which was available, as of Autumn 2023, to meet the employment land needs of the Fylde Coast to 2042, as identified in Section 8.0. This is distinct from the opportunities for additional employment land which are considered in Section 9.0. It also reviews 86 Employment Areas (industrial estates, business parks, etc.) which contain the bulk of the developed E(g)/B-Class premises in the Fylde Coast, considering the scale and nature of the offer they present to the sub-regional market.
- 7.2 Blackpool, Fylde and Wyre need a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices. The following sections consider the supply picture in Blackpool, Fylde and Wyre individually.

BLACKPOOL BOROUGH EMPLOYMENT LAND SUPPLY

Baseline Land Supply – Blackpool Borough

- 7.3 This Study has examined the 13 main Employment Areas of Blackpool Borough, as defined in Policy DM7: 'Provision of Employment Land and Existing Employment Sites' of Blackpool Local Plan Part 2: Site Allocations and Development Management Policies (2021), and identified opportunities for redevelopment and expansion, which could provide brownfield employment development land for the Borough. The full review of each Employment Area is provided later on in this Section. Table 54 below summarises the opportunities for brownfield redevelopment identified. Figures 42 and 43 show the Employment Areas and associated regeneration opportunities. This review of the Employment Areas has regard to previous Council studies of available employment land in Blackpool, most notably the 'Employment Land Update 2021 and Blackpool Airport Enterprise Zone Topic Paper' (2022).
- 7.4 Reflecting Paragraph: 009 (Reference ID: 3-009-20190722) of the National PPG note 'Housing and economic land availability assessment' only opportunities for redevelopment and expansion larger than 0.25 ha in size are considered in detail in this Study. Excluding small plots, a supply of 17.94 ha is identified in seven sites (see Table 54; sites labelled BB1-BB7).

Table 54 – Blackpool Employment Areas Analysis – Opportunities for Redevelopment and Expansion

Employment Area	Opportunities for Redevelopment and Expansion	Development Opportunity Sites (Employment Sites) for Further Review	Site Sizes, ha
<p>Blackpool Enterprise Zone - Blackpool Business Park / Squires Gate Estate / Sycamore Trading Estate</p>	<p>Eight infill plots in Blackpool Business Park. Eastern Gateway development site is located to the east. Another 1.15 ha (Parcel B) is identified south east of Blackpool Business Park. At Squires Gate Industrial Estate - Fox Brothers Transport and Recycling Yard, this site is in temporary use for commercial vehicle parking, with a 1 year consent for this which expires in May 2024. It thus represents a medium development opportunity, which could be linked to the Eastern Gateway site to the south. Further growth opportunities in Blackpool Airport, to the west and south, fall into Fylde Borough.</p>	<p>BB1: Blackpool Business Park Expansion Plots BB2: Eastern Gateway (Land consented for E(g)/B-Class uses) BB3: Parcel B BB4: Squires Gate Industrial Estate - Fox Brothers Transport and Recycling Yard</p>	<p>3.76 6.53 1.15 1.70</p>
<p>Vicarage Lane</p>	<p>One very small, 0.02 ha, undeveloped site is found off Burton Road, south of the Dennis Eagle manufacturing plant. Undeveloped land to the west forms part of the secure Valeo Snack Foods facility and is assumed not to be available to meet the needs of other parties. Area bounded by housing and retail offering no opportunities for expansion.</p>	<p>Undeveloped site falls below 0.25 ha in size.</p>	<p>-</p>
<p>Clifton Road</p>	<p>Two areas of vacant and underused land in the area:</p> <ol style="list-style-type: none"> Plot in South West of Industrial Estate, to rear of DePuy Synthes (2.50 ha) - Area of cleared backland, partly in use for open storage and HGV parking. Falls into the curtilage of the adjacent, recently completed Affordable Aluminium unit and only accessible via that property. Isolated backland site, which could not be developed for anyone other than the existing site owner/occupier. Site is already partially in use by that business. The land thus does not appear available to meet the needs of other occupiers. Unused Land in the Cadent Facility, Gerry Richardson Way (3.83 ha) - Considerable land within this facility is unused or in use for open storage. However, the land is occupied by the remains of a range of former gas holding and processing facilities, with extensive ground contamination likely. Remediating this site will likely generate considerable additional development costs and low value uses, including E(g), B2, B8 uses are very unlikely to be financially viable here. Thus, the site is not considered further. <p>Other undeveloped plots in the Area fall into the secure curtilages of facilities such as Nutrition</p>	<p>BB5: Plot in South West of Industrial Estate, to rear of DePuy Synthes</p>	<p>2.50</p>

Employment Area	Opportunities for Redevelopment and Expansion	Development Opportunity Sites (Employment Sites) for Further Review	Site Sizes, ha
	Group and the North West Division Police Headquarters and are assumed not to be available for development by other parties. Undeveloped land to the north and west comprises Mereside Park and playing fields for St Georges School. It is assumed these are not available for development. They are designated as green infrastructure protected by Policy CS6 of the Local Plan Part 1.		
Blackpool and Fylde Industrial Estate (Adjacent to roundabout at beginning of Yeadon Way, south west side) ⁴²	All development opportunities fall into Fylde Borough.	-	-
Preston New Road (NS&I)	Secure financial facility. It is assumed no land within the secure area is available for development by third parties. Area bounded by other uses including, housing and a caravan site offering no opportunities for expansion.	-	-
Chiswick Grove	All land in use. Area bounded by other uses including a cemetery, housing and a school offering no opportunities for expansion.	-	-
Mowbray Drive	One small undeveloped site in the north east – Infill Plot off Chorley Road, South East of Westfield Caravans (0.30 ha). Small grassed infill site, with road frontage, in the rear of an established industrial estate, bounded by a caravan sales facility and warehouses, HGV parking. Small, unconstrained plot which remains available to meet needs. Site is Council owned, allowing Blackpool Council to support the marketing and development of the site. Reflecting market demand, this small plot could either meet the needs of a single business or support a small scheme of light industrial units. Other undeveloped land in the estate falls into the private, secure facilities of larger occupiers like Enveco and Westfield Caravans and assumed not available for development by other parties. Area bounded by other uses including college buildings, housing and a railway line offering no opportunities for expansion.	BB6: Infill Plot off Chorley Road, South East of Westfield Caravans	0.30
Fox Industrial Estate ⁴³	Area is in full use. Land to the north east is in outdoor leisure use and assumed not available for development. This area is designated as green infrastructure protected by Policy CS6 and as a 'Site with Biodiversity Value' under Policy DM35 of the Local Plan Part 1.	-	-
Devonshire Road / Mansfield Road	All land in use. Area bounded by other uses including a cemetery, housing and a railway line offering no opportunities for expansion.	-	-

⁴²Part of Clifton Road in Policy DM7: 'Provision of Employment Land and Existing Employment Sites' of Blackpool Local Plan Part 2: Site Allocations and Development Management Policies (2021).

⁴³ Part of Mowbray Drive in Policy DM7: 'Provision of Employment Land and Existing Employment Sites' of Blackpool Local Plan Part 2: Site Allocations and Development Management Policies (2021).

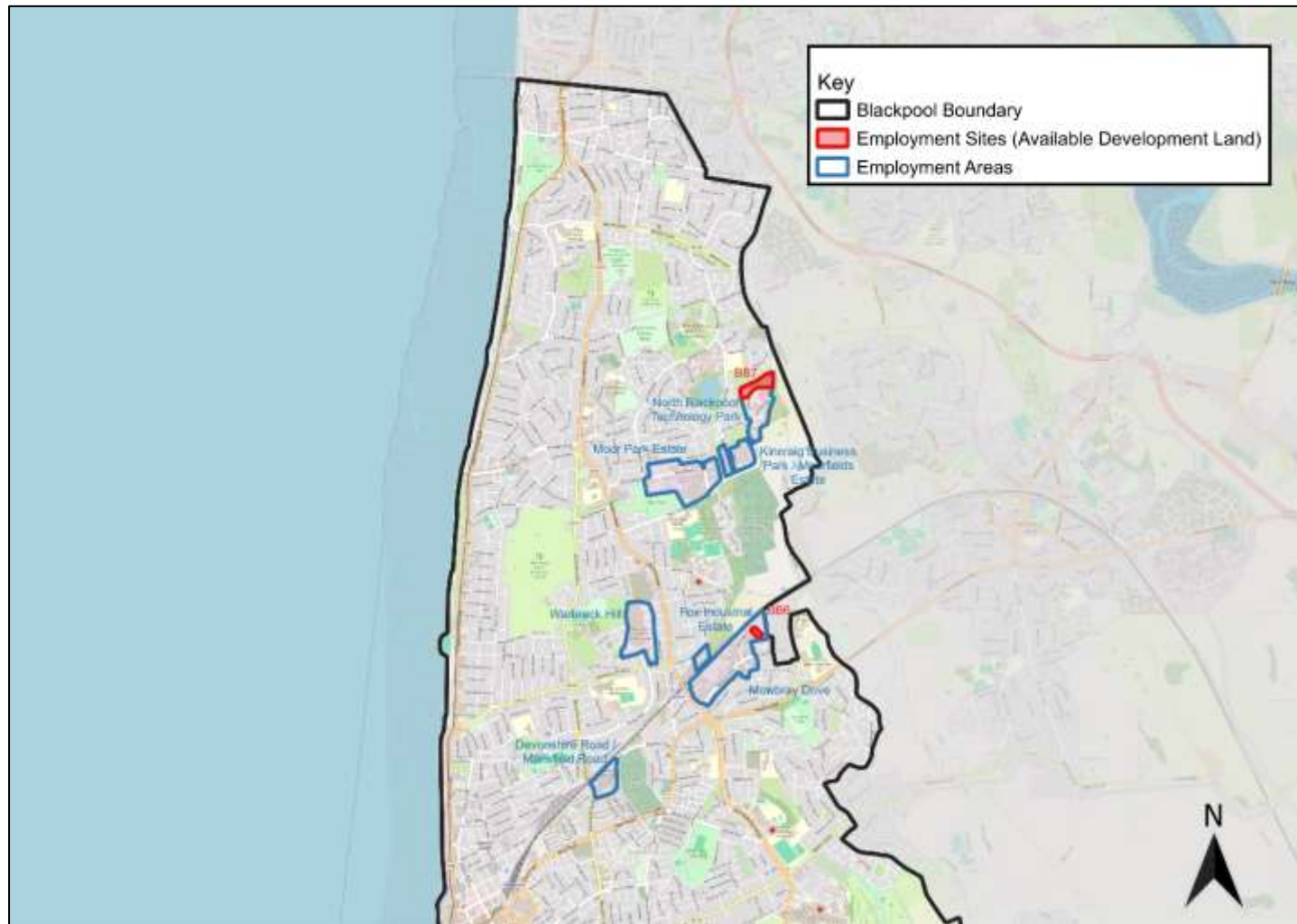
Employment Area	Opportunities for Redevelopment and Expansion	Development Opportunity Sites (Employment Sites) for Further Review	Site Sizes, ha
Moor Park	Site is in full use including a large electricity transformer facility. Previously vacant land on Bristol Avenue is now developed for the Wheeler Hub workshops, Land to the north of this is in use as a Household Waste Facility. Undeveloped land to the west and east is in outdoor leisure use, including Moor Park. These areas are designated as green infrastructure protected by Policy CS6 of the Local Plan Part 1.	-	-
Kinraig Business Park / Moorfields Estate ⁴⁴	Area is in full use. Undeveloped land to the north is in outdoor leisure uses and assumed not available for development. This area is designated as green infrastructure protected by Policy CS6 of the Local Plan Part 1.	-	-
North Blackpool Technology Park	Identified 2.0 ha expansion site in the north. Linear area of greenfield land in the north of an established, high quality business and science park on the edge of the Blackpool settlement area. Land in the south west is now developed for light industrial uses. Development plans for this site are discussed in the below Proforma. Area bounded by housing, with Green Belt land to the east, offering no opportunities for expansion.	BB7: Blackpool North Technology Park – Undeveloped land in the North	2.0
Warbreck Hill	Whole site is vacant and provides a redevelopment opportunity, with 28,654 sqm of existing floorspace on 8.36 ha. These properties are no longer needed by the public sector, and it is very unlikely that a private sector business, or businesses, could be found who would occupy even a portion of this extensive complex. This is particularly, true as the historic properties of Warbreck House will not meet the specification of modern office occupiers while the residential location of the site will be less attractive to businesses than competing alternatives in Central Blackpool or in the Whitehills/Blackpool Airport Enterprise Zone Area to the south, which links to the M55. Redevelopment of this site for E(g)/B-Class uses could have viability constraints. Certainly, redeveloping this office site for more modern office uses would not generate the necessary value uplift to fund the scheme, even if supported by demand. Market interest is for industrial, and warehouse uses but a large scale B2/B8 development here may not be appropriate in this primarily residential area, even if found to be viable. A mixed use redevelopment scheme is thus most likely here. It is understood that landowner aspirations are for a primarily residential scheme, which would generate the value to allow the clearance of the site, with some	-	

⁴⁴ Part of Moor Park in Policy DM7: ‘Provision of Employment Land and Existing Employment Sites’ of Blackpool Local Plan Part 2: Site Allocations and Development Management Policies (2021).

Employment Area	Opportunities for Redevelopment and Expansion	Development Opportunity Sites (Employment Sites) for Further Review	Site Sizes, ha
	<p>ancillary employment generating uses. It is understood those ancillary uses are presently intended to include health, community and retail/hot food options, supporting the housing. No E(g)/B-Class uses are being put forward which is again unsurprising given the mostly residential character of the area.</p>		
Total			17.94

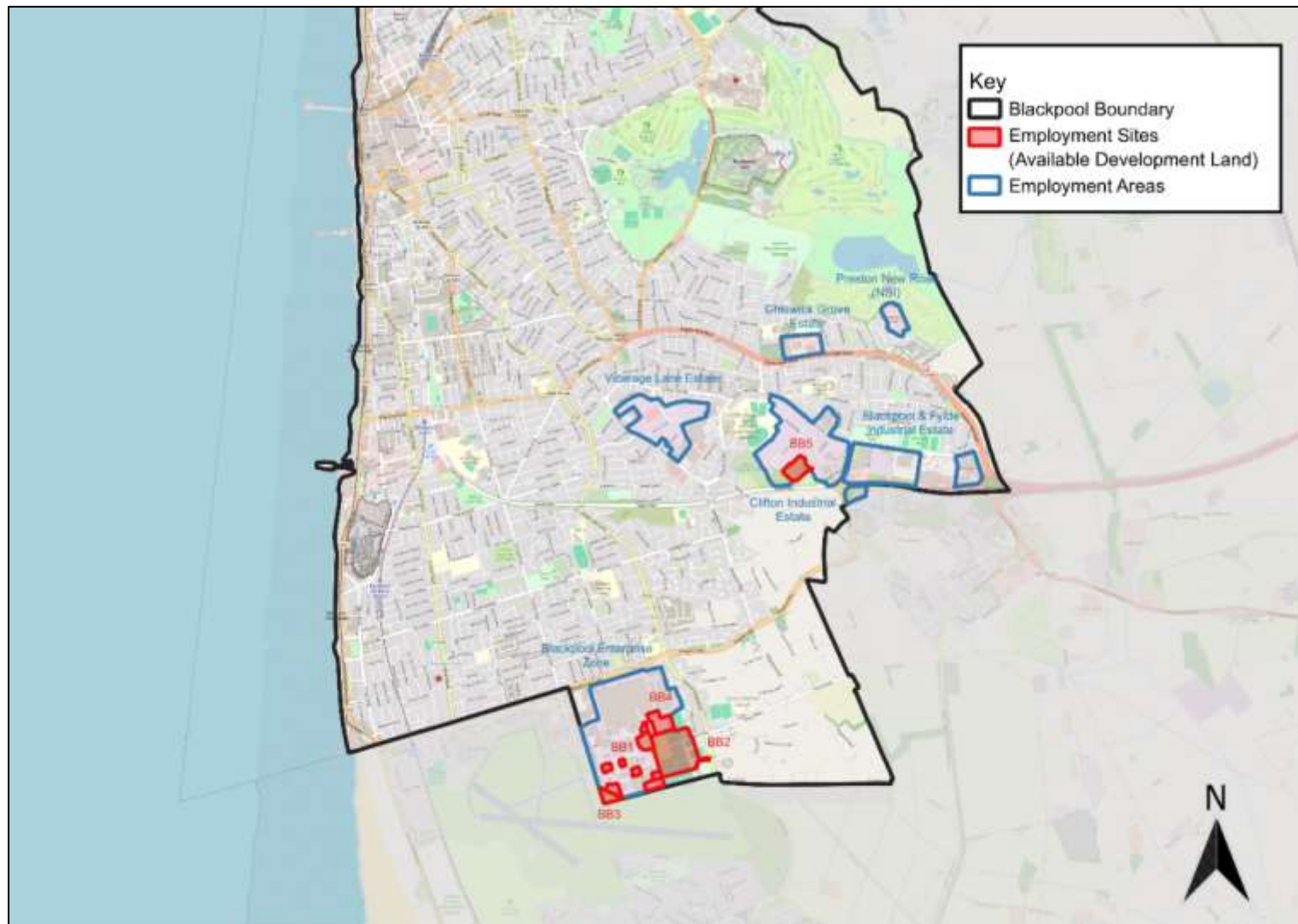
Source: BE Group, 2024

Figure 42 - North Blackpool Employment Areas and Employment Sites



Source: BE Group, 2024

Figure 43 - South Blackpool Employment Areas and Employment Sites



Source: BE Group, 2024

7.5 Site BB1: Blackpool Business Park is split into eight plots, labelled A-F. These are shown in Figure 44.

Figure 44 - BB1: Blackpool Business Park, Plots A-F



Source: BE Group, 2024

Employment Sites Analysis – Blackpool Borough

7.6 Table 55 provides a summary of the assessment of the seven Development Opportunity Sites (Employment Sites), referenced as BB1-BB7, as identified in Table 54 above. It considers:

- The Baseline Site supply, hectares
- Comments on landowner/developer plans for the Site, and its deliverability
- Likely use of the site
- The realistic employment land supply available to meet identified needs.

7.7 A more detailed analysis of each site is provided in the proformas set out in Appendix 3a.

Table 55 – Blackpool - Summary of Employment Sites Assessment (Land Supply)

Site Ref. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
BB1	Blackpool Business Park Expansion Plots	3.76	<p>Modern, high quality business park, to the rear of older industrial and retail premises, off a key route in the south of Blackpool, including eight further development plots.</p> <p>Multiple owners including Blackpool Council (north of the Business Park), Penult 105/TMW Holdings (south of the Business Park), Fylde Coast Holdings (Plot 101). Some road infrastructure owned by Blackpool Airport.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Foundations of previous uses, including former runway/taxiway surfacing, in some development plots • Potential contamination from previous uses • Proximity to Blackpool Airport Runway constrains building height and construction materials. Also, noise issues from the adjacent runway. <p>Part of an active Enterprise Zone although most EZ benefits have now lapsed.</p> <p>By plot:</p> <ul style="list-style-type: none"> • Blackpool Business Park Site A - Plot 102 (0.367 ha): Site has been on the market for 5 years and is now under offer (further details confidential at this time). Likely development would be for an industrial unit or a scheme of light industrial units. • Blackpool Business Park Parcel B - Site 109 (0.685 ha): Consented for 16 warehouse/industrial units of 220-450 sqm each in September 2023 (App. No 22/0365). 3,920 sqm of total floorspace. Consent is from an established local developer and the scheme is expected to come forward in the short term. • Blackpool Business Park Site C – ARC (0.185 ha): ARC have built a facility to the west. Site C is expected to be an expansion facility for ARC, of some 929 sqm. The Site falls within the curtilage of the ARC facility, is under common ownership with ARC, and is presently used by ARC for car parking. It is thus unlikely this site could be used for parties other than ARC. 	Most plots to be developed for light industrial or storage uses, providing the main source of small business accommodation to Blackpool’s micro and small firms. The eight sites could provide some 13,380 sqm in total, of which 10,962 sqm, in six plots, is consented/proposed for micro/small business units to meet wider needs.	2.97 (Excluding Sites C and F which are not available to meet wider needs, held for highways infrastructure or non E(g)/B-Class uses)

Site Ref. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<ul style="list-style-type: none"> Blackpool Business Park Site D – Chorley Group Car Parking (0.324 ha): Presently in use as car parking for Chorley Group. Could be additional workshop facilities for Chorley. If not needed by Chorley Group the most likely alternative would be micro business workshops of around 93 sqm each, reflecting developments elsewhere on the Business Park. At average densities the site could deliver 13 such 93 sqm units, 1,209 sqm in total. Blackpool Business Park Site E - Skyways Commercial Campus (0.392 ha): Consented for eight E(g)(iii) units of 96 sqm each (App. No. 22/0139). Various discharge of conditions activities being progressed. Development expected to commence within a year. 768 sqm of floorspace in total. Blackpool Business Park Site F (Less Multi-Ply) - Access for Eastern Gateway/Local Facilities (0.60 ha): The main Multi-Ply facility is now completed, as is a further unit of 929 sqm to the east, to accommodate further growth and expansion of Multi-Ply only. Other land will accommodate the new access road for the eastern Gateway and is also proposed to provide services including a convenience store no greater than 275 sqm; a café/sandwich shop no greater than 275sqm; and a children’s day nursery. Blackpool Business Park Site H - Enterprise Court Phase 2 (0.339 ha): Consented for five E(g)(iii)/B2/B8 Units of 232 sqm each, or 1,161 sqm in total (App. No. 22/0140). The site is being marketed off plan and understood to be attracting interest. It is unclear when it will be brought forward. The premises are expected to primarily accommodate the relocation and growth of local firms, however. Blackpool Business Park Site I - Enterprise Court Phase 3 (0.866 ha): Consented for two B2/B8 units of 1,394 sqm each, 2,788 sqm in total. The site is being marketed off plan and understood to be attracting interest. It is unclear when it will be brought forward. The premises are expected to primarily accommodate the relocation and growth of local firms, however. 		
BB2	Eastern Gateway	6.53	The Eastern Gateway comprises a large area of partial brownfield land and greenfield former sports pitches, south and east of established	For the marketed employment premises of the Eastern Gateway, market interest is reported from local industrial businesses	6.53

Site Ref. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p>industrial uses, of varying quality, on the edge of the wider Enterprise Zone.</p> <p>Blackpool Council own</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Trees onsite • Housing adjacent. <p>Site will be opened up by the new link road, from the Business Park, through the Eastern Gateway site, to the B5261 Queensway/Common Edge Road. The Queensway Link, has planning consent (App. No. 19/0271) and is due to start later in 2023, being delivered over 2024.</p> <p>Part of an active Enterprise Zone although most EZ benefits have now lapsed.</p> <p>Site split into three parcels:</p> <ul style="list-style-type: none"> • Sports Development Zone (6.206 ha): South and south east of the site proposed for outdoor leisure. Sports pitches delivered along with Common Edge Community Sports Village • Residential Area (1.42 ha): Land in the east, fronting the B5261 Common Edge Road/Queensway is allocated for 57 homes • Net Employment Land (6.48 ha): Land in the north and north west is marketed for a scheme of six B2/B8 Units of 1,394-6,968 sqm each, with a 5 year delivery timeframe. 21,367 sqm of total floorspace. Delivery is expected to be as design and build options or through a joint venture between Blackpool Council and a developer. <p>A planning application for the wider scheme was submitted by Blackpool Council in 2020, but later withdrawn (App. No. 19/0271). No further application submitted for the employment uses.</p>	<p>looking to relocate to more modern premises, plus some expansion. This is likely to drive development forward quickly, once the site is opened up by infrastructure. 21,367 sqm of total floorspace proposed.</p>	
BB3	Parcel B	1.15	<p>Parcel B, comprises a triangular area of grassed airfield land, including an airport access road, part of the wider Airport which falls into the Blackpool Local Authority Area.</p> <p>Blackpool Airport own</p> <p>Part of an active Enterprise Zone although most EZ benefits have now lapsed.</p>	Airport infrastructure.	-

Site Ref. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			Small Green Belt site. If utilised, the site would most likely support the relocation of airport infrastructure from the north west, such as the control tower. It is not expected to accommodate any new employment generating uses. Application, to Fylde Borough Council, App. No. 23/0589 for new aircraft hangars to the north allows the option of an access road running south east to B5261 Common Edge Road/Queensway, which would cross over Parcel B.		
BB4	Squires Gate Industrial Estate - Fox Brothers Transport and Recycling Yard	1.70	<p>Small brownfield site, in use for commercial vehicle parking, in a backland location with constrained access.</p> <p>EP Properties own. Let to Fox Brothers.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Foundations of previous uses on the site • Likely contamination from past and existing uses. <p>The site has a 1 year consent for commercial vehicle parking which expires in May 2024. It thus represents a medium term development opportunity, which could be linked to the Eastern Gateway site to the south.</p>	Based on reported demand at the Eastern Gateway, the most likely interest here would be for two B2 industrial units of around 3,000 sqm each to allow the relocation and some expansion of local businesses, 6,000 sqm of floorspace in total.	1.70
BB5	Plot in South West of Industrial Estate, to rear of DePuy Synthes	2.50	<p>Area of cleared backland, partly in use for open storage and HGV parking. Falls into the curtilage of the adjacent, recently completed Affordable Aluminium unit and only accessible via that property.</p> <p>Affordable Aluminium own</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Housing and Gypsy/Traveller site adjacent <p>No identified proposals for development.</p> <p>Isolated backland site, which could not be developed for anyone other than the existing site owner/occupier. Site is already partially in use by that business. The land thus does not appear available to meet the needs of other occupiers.</p>	Not available to meet wider business needs.	-

Site Ref. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
BB6	Infill Plot off Chorley Road, South East of Westfield Caravans	0.30	<p>Small grassed infill site, with road frontage, in the rear of an established industrial estate, bounded by a caravan sales facility and warehouses, HGV parking.</p> <p>Blackpool Council own. Site, along with land to the south, in use for vehicle parking, was let for 125 years, in 2016, to Trevors Warehouses.</p> <p>No identified proposals for development.</p> <p>Small, unconstrained plot, with road frontage. The site has been let on a long leasehold, but no development, or storage uses, have occurred here in some eight years so the land remains available for development.</p> <p>Blackpool Council is the ultimate freeholder of the land, allowing Blackpool Council to support and encourage the development of the site, subject to the aspirations of the leaseholder.</p>	Reflecting market demand, this small plot could either meet the needs of a single business or support a small scheme of light industrial units. The site could provide 1,170 sqm of industrial or warehouse space at average densities.	0.30
BB7	Blackpool North Technology Park – Undeveloped land in the North	2.0	<p>Linear area of greenfield land in the north of an established, high quality business and science park on the edge of the Blackpool settlement area. Land in the south west is now developed for light industrial uses.</p> <p>Blackpool Council own. Cumpsty Properties (AC Properties) has a 125 year lease, from 2019, on the southern half of the site, 1.116 ha in total.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Ponds onsite • Areas of ecological value • Footpaths cross the site • Trees onsite • Housing adjacent. <p>Southern area of the site, let to Cumpsty Properties (AC Properties), is being brought forward for light industrial and warehouse development. In 2021, Cumpsty secured consent for a scheme of three E(g)(iii)/B8 units, of 256-390 sqm each, totalling 902 sqm (App. No. 20/0443). The scheme has been developed with some units now occupied.</p> <p>These properties are identified as Phase One of a larger scheme, extending across Cumpsty Properties (AC Properties) holdings. In 2022,</p>	<p>Notwithstanding the refused planning application, there is a clear desire by a developer to develop just over half the site for light industrial units. The latest masterplanning suggests the land controlled by Cumpsty Properties (AC Properties) could support eight E(g)(iii)/B8 units, including those already developed, totalling 2,149 sqm, or 1,247 sqm less those already completed. Other land in the south would be used for environmental mitigation.</p> <p>Another 0.88 ha of land remains available in the north of the site, capable of providing 3,432 sqm of further space at standard densities. This land could support further growth of the light industrial uses here with an access off Hawking Place, although masterplanning suggests that such an access would need to cut through land</p>	1.46 (Excluding land in the south west now developed)

Site Ref. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p>consent was sought for a Phase Two scheme, of two E(g)(iii)/B8 units, of 214 sqm each, totalling 428 sqm, on land to the south west of Phase One (App. No. 22/0206). However, this application was refused as the development might interfere with the Phase One development, provides insufficient car parking and insufficient mitigation for the biodiversity impacts of the development.</p> <p>Consent is now being sought for a Phase Three development, east of Phase One (App. No. 22/0749). Development would comprise three E(g)(iii)/B8 units, of 232-355 sqm each, totalling 819 sqm. The application also seeks consent for the Phase Two units previously refused.</p>	<p>presently proposed for environmental mitigation. Before the 0.88 ha is allocated again in the next Local Plan, confirmation should be sought as to how it could be accessed and what the developable area would be net of land to be protected for environmental mitigation.</p>	
	Total	17.94			12.96

Source: BE Group, BBC, Other Stakeholders, 2024

- 7.8 As Table 55 shows of the 17.94 ha identified in seven sites as potentially available, **12.96 ha in five sites** appears realistically available to meet wider needs. This excludes BB5: Plot in South West of Industrial Estate, to rear of DePuy Synthes (2.50 ha), a backland site which could not be used by any business other than its owner occupier. It also excludes 0.54 ha at BB7: Blackpool North Technology Park – Undeveloped land in the North, now developed for light industrial uses, and 0.79 ha, in two plots (C and F) at BB1: Blackpool Business Park Expansion Plots, which are expected to be held for the exclusive use of adjoining occupiers, to support road infrastructure or provide services. Finally, BB3: Parcel B (1.15 ha) at Blackpool Airport Enterprise Zone will be held for the relocation of airport infrastructure.
- 7.9 Of the remaining land identified in Table 55, 11.20 ha or 86 percent is focused within the Blackpool Airport Enterprise Zone in the south of the Borough.
- 7.10 Across all the remaining sites, development plans are for local scale industrial, and warehouse uses and primarily light industrial units of less than 500 sqm each. Only at BB2: Eastern Gateway are larger B2/B8 units of 1,394-6,968 sqm proposed. Overall, the remaining sites could accommodate 47,178 sqm of floorspace.
- 7.11 No office uses are proposed, or likely, on any of the plots suggesting that future office requirements will need to be met in Central Blackpool and on immediately adjacent sites in Fylde Borough at Blackpool Airport Enterprise Zone (Avroe Crescent/Sir Frank Whittle Way). In this regard, development of the Knowledge Quarter scheme at Blackpool Airport Enterprise Zone (in Fylde Borough, see below) would deliver up to 15 office or data centre properties totalling 70,355 sqm (gross) fronting the A5230 Squires Gate Lane and is thus well able to support the Blackpool market.

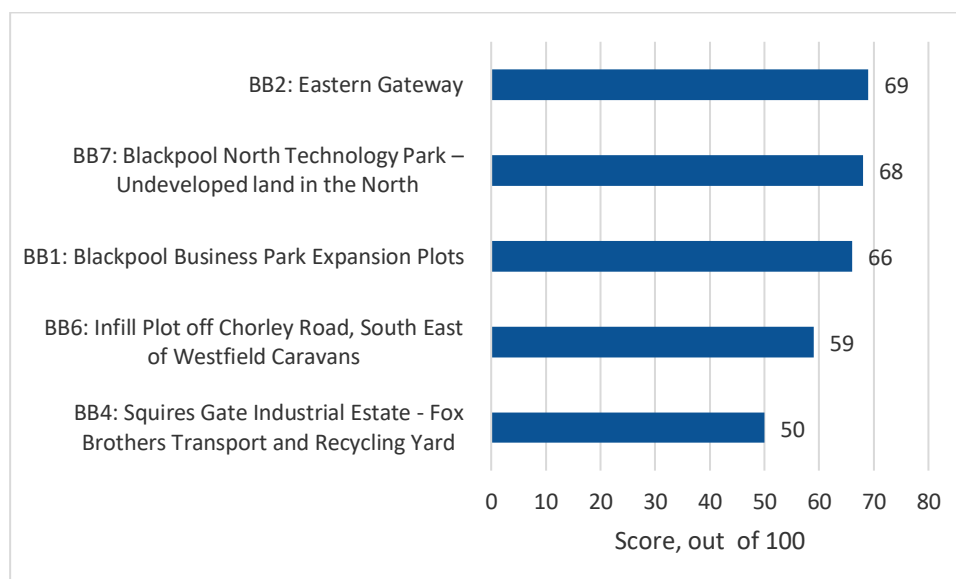
Site Scoring – Realistic Supply

- 7.12 Each realistically available Site has been scored against ten criteria relating to Site Location and Access, Development Prospects, Site Conditions and Availability. The maximum score possible is 100. The Scoring Criteria can be found in Appendix 6 and individual Site scores can be found in Appendix 7. Figure 45 shows the scoring for the five sites identified as comprising Blackpool's maximum realistic long-term supply. The assessment gives an appraisal of the overall quality of the land resource and provides one measure of what sites could be considered priorities for Local Plan allocation and what sites are of secondary value.

7.13 The highest scoring site is the BB2: Eastern Gateway site at the Blackpool Airport Enterprise Zone, a well located growth site with strong plans for delivery and soon to benefit from a new access road. BB7: Blackpool North Technology Park – Undeveloped land in the North also scores well reflecting its accessibility and plans for development which are actively being implemented.

7.14 The lowest scoring site is BB4: Squires Gate Industrial Estate - Fox Brothers Transport and Recycling Yard. A backland plot with constrained access, this site is in use by a leaseholder at present but does represent a medium term infill opportunity within the Enterprise Zone.

Figure 45 – Blackpool Sites Scoring – Realistic Supply



Source: BE Group, 2024

FYLDE BOROUGH EMPLOYMENT LAND SUPPLY

Baseline Land Supply – Fylde Borough

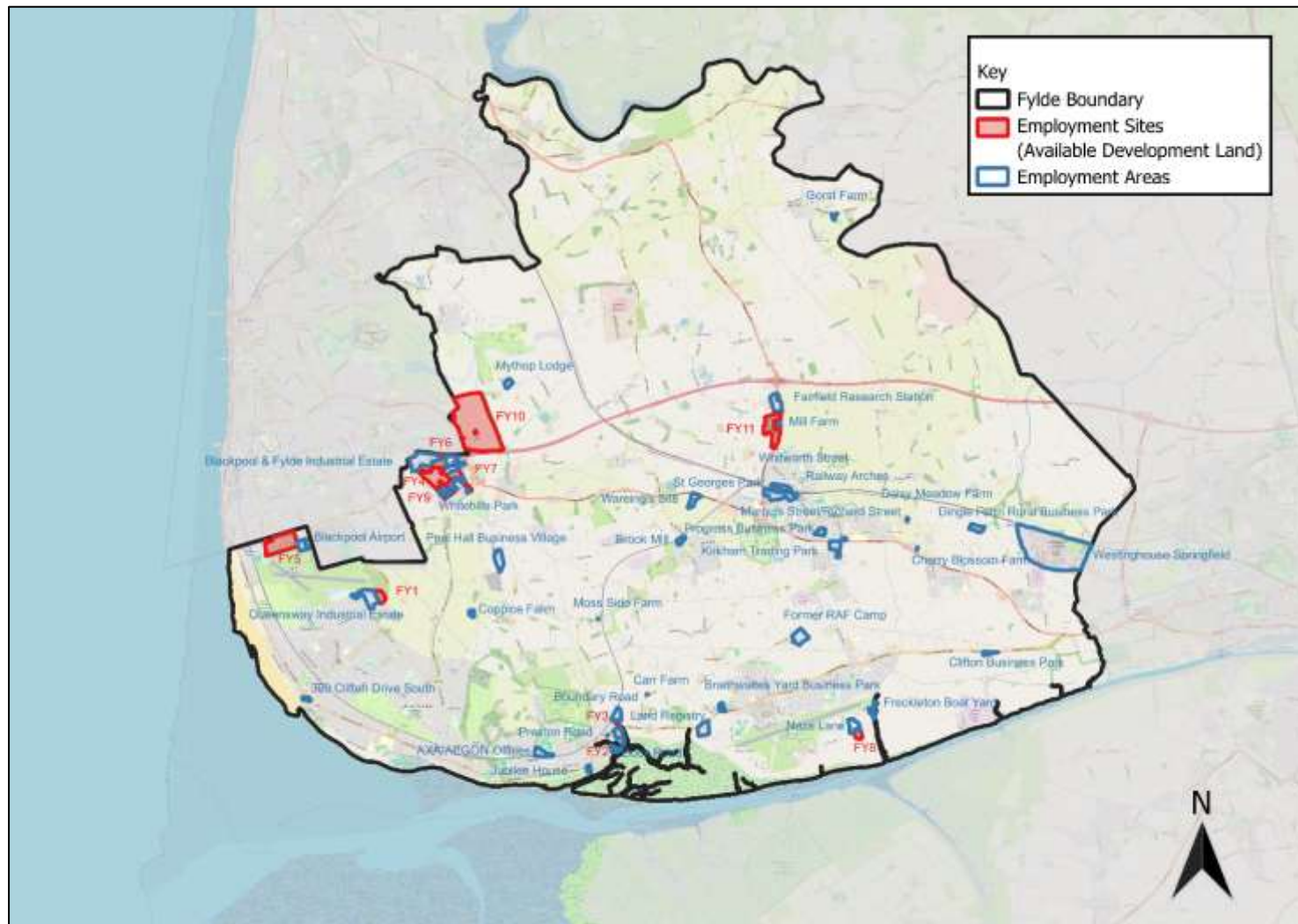
7.15 The starting point for the supply assessment is Policy EC1 of Fylde’s Adopted Local Plan (2021). This policy identified 62 ha of new employment land, in 11 sites, to be delivered during the plan period. That supply had reduced to 56.35 ha as of Fylde Council’s latest Business and Industrial Land Schedule (March 2023 – ‘Table G: Take up rates on Employment Land (hectares) in Fylde, April 2011 to March 2023’, Pages 15-6). These comprise Fylde Borough’s existing employment land supply (see Table 56 and Figure 46).

Table 56 – Baseline Land Supply – Fylde

Site No. (Study Ref.)	Local Plan Ref.	Site	Size, ha	Comment
FY1	ES1	Queensway Industrial Estate, Snowden Road, St. Annes	3.80	Uses acceptable under Policy EC1: E(g), B2, B8
FY2	ES2	Dock Road, Lytham	0.145	Uses acceptable under Policy EC1: E(g), B2, B8
FY3	ES3	Boundary Road, Lytham	0	Uses acceptable under Policy EC1: E(g), B2, B8
FY4	ES4	Blackpool and Fylde Industrial Estate, Whitehills	2.40	Uses acceptable under Policy EC1: E(g), B2, B8
FY5	ES5	Blackpool Airport Enterprise Zone, Squires Gate	14.50	Uses acceptable under Policy EC1: E(g), B2, B8 (to be determined through a masterplan for the Enterprise Zone)
FY6	ES6	DWP, Brunel Way, Whitehills	4.90	Uses acceptable under Policy EC1: E(g), B2, B8
FY7	ES7	Whitehills Business Park, Whitehills	4.90	Uses acceptable under Policy EC1: E(g), B2, B8
FY8	ES8	Naze Lane, Freckleton	2.40	Uses acceptable under Policy EC1: E(g), B2
FY9	MUS1	Cropper Road East, Whitehills (mixed use: Housing and employment)	3.30	Uses acceptable under Policy EC1: E(g), B2, B8
FY10	MUS2	Whyndyke Garden Village, Preston New Road, Whitehills (mixed use: housing and employment)	20.0	Uses acceptable under Policy EC1: E(g), B2, B8
FY11	MUS3	Mill Farm Sports Village, Fleetwood Road, Wesham (mixed use: employment and leisure)	0	Uses acceptable under Policy EC1: E(g), B2, B8 and E(d)
Total			56.345	

Source: BE Group, FBC, 2023

Figure 46 - Fylde Baseline Employment Land Supply and Employment Areas



Source: BE Group, 2024

- 7.16 The above supply excludes any land at the BAE Warton site, which forms part of the Lancashire Enterprise Zone. This reflects the view, consistent with Local Plan Policy and past Employment Land Needs Studies, that BAE Warton is a strategic site aimed at meeting larger than local needs only. Additionally, that BAE Warton is a secure site where, reflecting the experience at BAE Samlesbury, most development will be for the exclusive use of BAE and related businesses in its supply chain. BAE Warton is thus not a source of readily available employment land which could be taken up by any business on the Fylde Coast and accordingly is not considered part of Fylde's baseline employment land supply, for review here.

Employment Sites Analysis – Fylde Borough

- 7.17 Table 57 provides a summary of the assessment of the 11 Employment Sites, as outlined in Table 56 above. It considers:
- The Baseline Site supply, hectares
 - Comments on landowner/developer plans for the Site, and its deliverability
 - Likely use of the site
 - The realistic employment land supply available to meet identified needs.
- 7.18 A more detailed analysis of each site is provided in the proformas set out in Appendix 4a.
- 7.19 As Table 57 shows of the 11 employment sites, totalling 56.35 ha, allocated in the Local Plan a supply of **56.61 ha in ten sites** is realistically available to meet ongoing needs. The site now excluded from the realistic supply is FY8 Naze Lane, Freckleton (2.40 ha), a very isolated backland, rural site which has been undeveloped for some time. If not required by its owner, an adjacent business, it is unlikely to be of interest to other firms.
- 7.20 FY7 Whitehills Business Park, Whitehills has seen good growth and development in recent years, with most take up being for industrial and warehouse uses. 2.87 ha remains available for E(g)/B-Class development here.

Table 57 – Fylde - Summary of Employment Sites Assessment (Land Supply)

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
FY1	Queensway Industrial Estate, Snowden Road, St. Annes	3.80	<p>Moderate quality greenfield site, on the edge of the St Annes urban area, with existing average quality industrial estate to the west and Lytham Moss Green Belt to the north and east.</p> <p>Gillett Group Holdings own.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Proximity to Blackpool Airport Runway constrains building height and construction materials. Also, noise issues from the adjacent runway. • Possible wildlife habitats on site. <p>Land in the process of being sold, with the new owner’s intentions not yet clear. However, the land remains available as a logical extension to an established local industrial estate, in a gateway location into St Annes.</p>	<p>The most likely uses would be light industrial, industrial and warehouse uses which are all in good demand.</p> <p>At average employment densities the site could provide 14,820 sqm of floorspace.</p> <p>Given nearby housing developments, pressure for residential uses is also likely here.</p>	3.80
FY2	Dock Road, Lytham	0.145	<p>Small rectangular shaped brownfield, in use as car parking, in the curtilage of a large manufacturing unit, in a small industrial estate.</p> <p>Helical Industries own.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Site in an area of Flood Risk, primarily Flood Zone 2. Flood defences in place on northern boundary • Close to Ribble wetlands ecological site (Ramsar site, National Nature Reserve, Site of Special Scientific Interest, Special Protection Area, Biological Heritage Site) • Possible contamination from previous uses. <p>Site presently in use for car parking. It remains available for development. It is most likely to be developed for the exclusive use of the landowner Helical, however, its position on Dock Road means that it could be sold to other parties for separate development.</p>	<p>The most likely development potential would either be for light industrial uses which are in good demand at present or to a single business for a solus B2/B8 development. Some 3,500 sqm could be developed here at average densities.</p>	0.145

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
FY3	Boundary Road, Lytham	0	<p>Cleared former car dealership workshop on a main road location, fronting a low quality industrial estate, on the edge of Lytham.</p> <p>Aldi Stores own (acquired May 2023).</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Possible contamination from previous uses • Foundations of previous buildings onsite • Trees onsite • Access likely to be off Boundary Road, however, this is an unadopted, unsurfaced industrial estate road. An alternative access may be provided to Preston Road although this may require land to be released from the adjacent former Stanway Car Showroom. <p>The site, extending west to include the Stanways Car Garage and units to the rear, now has consent for (App. No. 22/0593):</p> <ol style="list-style-type: none"> 1. A foodstore of 1,881 sqm and associated parking in the south 2. 0.49 ha of land in the north (application estimate) to be developed for 80 storage/employment units of some 28 sqm each, in six terraces, totalling 2,226 sqm. The identified tenant for this is Storage 24. <p>The site has since been cleared and various discharge of conditions applications made so rapid implementation is assumed.</p>	<p>The south of the site now has consent to be developed for a foodstore. 0.49 ha in the north now has consent for a B8 storage facility, providing small storage units to craftsmen/trades people, retailers, and entrepreneurs operating as individuals, start-ups, and SMEs. The consented development is being progressed. 0.49 ha thus remains in relevant employment use, albeit with a rapid take up likely.</p>	0.49
FY4	Blackpool and Fylde Industrial Estate, Whitehills	2.40	<p>Moderate quality brownfield site at entrance to existing industrial estate and government offices.</p> <p>TLW Trading Properties own.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Possible contamination from previous uses • Trees onsite • Overhead electricity pylons cross the site • Gas pipelines and drainage pipes cross the edges of the site • Adjacent to waste water pumping station. <p>Full planning consent is now being sought for three industrial buildings consisting of eight units of between 219 sqm and 412 sqm each (App. No.</p>	<p>Planning now being sought for an industrial scheme totalling 2,668 sqm, expanding a well-established local industrial estate. The remaining land could provide another 4,017 sqm at average densities.</p>	2.40

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			23/0128). The proposal would take up 1.37 ha in the west of the site, with the remaining land in the east held for phase 2-3 schemes. The application is submitted by Blackpool based AC Electrical. It is not known if any of the proposed space will be used by this company or if it will all be offered to other businesses.		
FY5	Blackpool Airport Enterprise Zone, Squires Gate	14.50	<p>Active airport facilities including terminal buildings, hangars and a range of offices and workshops, along with modern further education facilities and areas of airport taxiway in the south. In a prominent location on the southern edge of Blackpool.</p> <p>Blackpool Airport Properties (Blackpool and Fylde College Buildings owned by the College) own.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Active airport facilities constrain building height and construction materials. Also, noise issues from the adjacent runway. • Includes Green Belt land • A range of active businesses, airport facilities on the site. Some premises let out to other operators. • Various pieces of infrastructure on the site which need to be protected • Blackpool and Fylde College has an option on the terminal buildings. <p>Part of an active Enterprise Zone although most EZ benefits have now lapsed.</p> <p>Knowledge Quarter</p> <p>Longer term (10 plus years) proposal for a Knowledge Quarter (Silicone Sands) a high technology business park aimed at attracting businesses and investment in ICT, professional and research and development sectors.</p> <p>The Knowledge Quarter would benefit from proximity to the Transatlantic Aquacomms fibre cable which links the UK to the US and Northern Europe and comes ashore at Starr Gate, Blackpool, to the west, and allows high internet speeds locally.</p>	Proposed for a high tech business park, the Knowledge Quarter, comprising some 70,355 sqm of gross floorspace. Funding and delivery plans still to be agreed, however, delivery is dependent on the ability to viably relocate Airport Uses to the south (the Aviation Zone). At the time of writing, it is not clear what additional employment land the Aviation Zone could generate and to what degree it will simply relocate existing airport uses from the north.	14.50

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p>It would begin with at technology demonstrator facility to highlight what could be achieved here and build up market interest for a larger development.</p> <p>Funding to be secured. A strong element of public sector funding and leadership is assumed.</p> <p>Revised masterplan under development. The existing masterplan proposes 17, 2-3 storey offices, plus a data centre, of 1,881- 11,688 sqm each. Three of those offices, HN14-KN16 are located on essential infrastructure sites and unlikely to be delivered. This leaves 15 possible properties totalling 70,355 sqm (gross).</p> <p>Delivery is dependent on the ability to viably relocate Airport Uses to the south (see below).</p> <p>Aviation Zone</p> <p>Longer term (10 plus years) proposal to relocate and significantly expand the Airport, which would allow the Knowledge Quarter development to the north. Heavily dependent on demand, public sector support and Airport aspirations, none of which are fully secured at the time of writing.</p> <p>However, in September 2023, Blackpool Airport Properties sought a Hybrid planning consent for five hangars of 1,920-5,720 sqm, a commercial unit of a 570 sqm, and a private commercial car park (Outline consent) and new access roads to connect the proposed hangars to Amy Johnson Way, existing highways improvements and drainage works (full consent) (App. No. 23/0589). The five hangars would be located in the north west of the site.</p> <p>Stakeholders report reasonable market interest for air operations here. Provisionally, the smaller hangars would accommodate basic aviation storage and repair. The larger hangars could accommodate a more significant maintenance facility.</p> <p>Masterplanning identifies 19 plots, two of which will accommodate the relocation of the Control Tower, Radar, Fire Stations. The remaining would accommodate 49,278 sqm on new floorspace comprising 15 hangars of 721-2,1000 sqm each. A data centre of 2,790 sqm and 1,010 sqm office.</p>		

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
FY6	DWP, Brunel Way, Whitehills	4.90	<p>Large area of flat brownfield land, adjoining a large secure facility for the DWP and falling within the secure area.</p> <p>Elite Gemstones Properties own. Subject to a 10 year lease to the Secretary of State for Communities and Local Government to 2028.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Ponds onsite • Trees onsite. <p>Several hundred DWP staff presently occupy Peel Park. Over time they will relocate to the new office on King Street, Blackpool. At this time, it is not clear if the DWP will retain Peel Park or quit the lease. No further change is likely until the future of the wider site is clarified.</p> <p>Development here will depend on the future of the wider Peel Park site. Assuming the public sector did fully vacate the building then providing a new private sector occupier to accommodate this large facility would be extremely challenging. The alternatives would be sub-division of the properties for multi-occupancy or a comprehensive redevelopment scheme, likely incorporating site FY6.</p>	<p>In the present market the most likely use to be developed here would be small to mid-sized industrial uses. These are in demand with schemes actively being progressed on nearby sites. The costs of site redevelopment may require mixed use options here, however, with housing or services cross funding employment uses.</p> <p>The FY6 site would provide 19,110 sqm at standard employment densities</p>	4.90 (but subject to variation depending on the future of the DWP site)
FY7	Whitehills Business Park, Whitehills	4.90	<p>Multiple undeveloped greenfield plots in a good quality office and industrial park.</p> <p>Henco International own (vacant plots).</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Surface water and drainage issues. <p>Four main undeveloped plots at time of writing:</p> <ul style="list-style-type: none"> • <i>Whitehills Retail Park (Land bounded by Hallam Way in the south east, Brooklands Way to the south west, Dugdales Close to the north west, B&Q Blackpool to the north east) (1.69 ha) – Full Planning consent for a 10,195 sqm retail park, West Retail Park (App. No. 17/0359), has now lapsed. Henco intend to seek another</i> 	<p>Whitehills has seen extensive development over the last decade. There remains good demand for industrial, trade and warehouse units of up to 929 sqm each from companies local to the Lytham, St Annes and Blackpool area. At average densities, the remaining land proposed for E(g)/B-Class uses could provide</p>	2.87 (Realistic developable area for E(g)/B-Class uses)

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p>consent for a comparable retail/services scheme. Assuming a new consent is secured, Henco have a joint venture agreement with Barnfield Construction so intend to deliver the scheme quickly on a speculative basis, to provide retail, hot food and leisure uses to serve the wider area.</p> <ul style="list-style-type: none"> • <i>Site 3 (Land south of the Hallam Way, Graceways, Boardmans Way Roundabout) (0.56 ha)</i> – Further development on hold here, pending more clarity on long term economic conditions. When delivered, the plot is expected to comprise light/general industrial and warehouse space. • <i>Site 4 (Land bounded by Hallam Way to the north west, Graceways in the south west, B5410 Lytham St Annes Way to the south east, the Neptune Court Office Scheme to the north east) (0.90 ha)</i> – Further development on hold here, pending more clarity on long term economic conditions. When delivered, the plot is expected to comprise light/general industrial and warehouse space. • <i>Site 5 – (Land Bounded by Westby Close in the north west, Brooklands Way in the north east, mixed offices/trade units in the south east (including units for Travis Perkins and Enterprise Rent a Car), undeveloped land in the south west) (1.41 ha)</i> – Eastern half of the site has consent for a warehouse building of 2,836 sqm (gross) housing four business units of 465-975 sqm each (App. No. 23/0257). Further growth options to the west include a further business unit of 418 sqm and a three-storey office building of 1,394 sqm. Henco is weighing up the costs of delivering this development. Viability is a question at present with construction costs hovering at around £100/sqft (£1,076/sqm) plus land value. A negative viability assessment may delay delivery for a year or so. 	<p>some 11,193 sqm. Limited future office development is assumed as Henco identify insufficient local demand to support speculative office developments (i.e. developments without a pre-agreed occupier which offer greater risk to developers as the letting or sale of the completed properties is not guaranteed).</p>	
FY8	Naze Lane, Freckleton	2.40	<p>Low quality backland extension to an isolated rural industrial estate.</p> <ul style="list-style-type: none"> • Land south of existing industrial estate – Polytank Group own. • Land fronting Naze Lane – Private Individual owns. <p>Constraints:</p> <ul style="list-style-type: none"> • East of the site includes one small workshop which is in use 	<p>Isolated backland site with very limited access north to the A584 Preston New Road. While it is noted that access to Freckleton has improved more generally with the opening of the new Junction 2, M55 this</p>	-

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<ul style="list-style-type: none"> • South of this workshop are the foundations of several other small buildings, trees and hedges • Proximity to Warton Aerodrome constrains building height and construction materials. Also, noise issues from the adjacent runway. <p>Polytank Group has previously indicated that the land is surplus to requirements and that it might look to dispose of the land.</p>	<p>does not change the backland status and more immediate access constraints of this site, off Naze Lane.</p> <p>Although there is reasonable demand for smaller industrial/warehouse uses across the Fylde Coast, this site is likely to be a low priority for businesses and developers. Assuming Polytank Group does not need the land, and has no other development plans, the development of this site, for E(g)/B-Class uses appears unlikely.</p>	
FY9	Cropper Road East, Whitehills	3.30	<p>Large backland greenfield/brownfield site within the wider Whitehills area, to the rear of employment and housing uses.</p> <p>Lancashire County Council own.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Electricity pylons cross the site • Various pipelines cross the site • Several dwellings on the site, at Old House Lane. Other dwellings/farm buildings in the north east. All owner occupied • Trees onsite • Public footpaths cross the site. <p>Land fronting Cropper Road now developed for housing. No identified development plans for the land to the east.</p> <p>Site sits in the backlands at present and is likely to be of limited interest to developers at present, compared to more prominent options in the</p>	<p>Reflecting demand, development here would most likely be for small-medium sized industrial and warehouse units. The site could provide some 22,230 sqm of floorspace at average densities.</p>	3.30

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			Whitehills area. However, the development of adjoining sites, including FY4 Blackpool and Fylde Industrial Estate, Whitehills will open up this land while completion of the remaining plots at Whitehills Business Park will encourage businesses and developers to look at options further from the main roads. A comprehensive masterplan will be needed for the site, particularly clarifying site access and links to existing employment areas.		
FY10	Whyndyke Garden Village, Preston New Road, Whitehills	20.0	<p>Large area of primarily greenfield land at the edge of the Blackpool settlement area, north east of Junction 4, M55 and fronting the A583 Preston New Road.</p> <p>Primary landowner is Closelink. Land in north east corner is owned by Metacare (Northern Trust).</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Various waterbodies and drainage ditches on the site • A small area of land in the north of the site is in Flood Zone 2 • Pylons cross the eastern edge of the site • Various areas of woodland on the site, large area of woodland along the eastern boundary • Small Local Nature Reserve on the Site (Local Plan Policy ENV2) • Various ecological features on the site. Mitigation included in the Outline consented scheme. <p>The site has Outline consent for 1400 residential dwellings, 20 ha of B2/B8 industry and warehousing (proposed for the south of the site), a primary school, two local neighbourhood centres, a drinking establishment, health centre and community building, with vehicle access onto Preston New Road and Mythrop Road, along with associated road infrastructure, car parking, public open space, sports pitches, allotments, the retention and improvement of natural habitats, watercourse, ponds, reed beds, hedgerows and landscaping features (App. No. 11/0221).</p> <p>A Section 106 was signed in relation to this development in June 2018.</p> <p>Several Discharge of Conditions applications under consideration.</p> <p>Reserved Matters consent for a public house, and associated access, in the centre of the site (App. No 21/0487).</p>	The consent for B2/B8 uses is being progressed for 120,000 sqm of floorspace although it is understood the developer may also seek more provision of light industrial and office uses here.	20.0

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p>Agents for the site report that owners are in the process of negotiating a deal with a developer who will bring forward the site under the existing consent, i.e. 1,400 dwellings and 20ha of employment land, with the latter comprising:</p> <ul style="list-style-type: none"> • 40,000 sqm B2 • 80,000 sqm B8. <p>But the developer is looking to extend the amount of light industrial and office use to create a more mixed use scheme. The developer is looking to submit a Reserved Matters consent by early 2024, for the full scheme, and then progress the development as soon as possible.</p>		
FY11	Mill Farm Sports Village, Fleetwood Road, Wesham	0	<p>Modern, good quality mixed use employment area, on the route between Kirkham/Wesham and Junction 3, M55. Site is focused around the AFC Fylde Football Ground and a large B8 unit for Trilanco and includes a foodstore, other sports facilities and roadside services.</p> <p>Tangerine Group Holdings and Mill Farm Ventures own.</p> <p>The remaining land comprises seven plots, mostly north of the Football Stadium. Discussions with the site owners, and their agents, suggest the following proposals here:</p> <ul style="list-style-type: none"> • Plot A (Land east of the Mill Farm Sports Village Playing Pitches and Sports and Education Building) (3.24 ha) – Under conditional contract to toy company HTI for a new HQ building. A planning application for this 19,554 sqm B2/B8 facility is being considered (App. No. 22/0616). Development would include the movement south of an attenuation pond. • Plots B-C (South of Plot A) (0.27 ha and 0.42 ha) – Owner looking to dispose of. Confidential discussions underway with potential occupiers • Plot D (Between Coronation Way and Mill Farm, farm buildings) (0.16 ha) – Available for development • Plot E (Land occupied by the Mill Farm, farm buildings, extending south to the Football Stadium, fronting A585 Fleetwood Road) (0.66 ha) – Considered for services, due to its position on the main road • Plot F (South of Plot D, north of the Football Stadium) (0.39 ha) – Interest from a church, subject to planning 	<p>Mixed use site, but with established interest for industrial and warehouse uses, as evidenced by the HDI HQ proposal, alongside retail and leisure uses. Four other plots remain available on the site for E(g)/B-Class employment although other uses are also possible here as evidenced by the interest for uses such as a church. The outstanding plots are mostly sub 0.7 ha in size and so would most likely support light industrial uses or solus businesses, reflecting market demand. In addition to the 19,554 sqm HDI facility, the remaining plots, not proposed for alternative uses, could provide some</p>	4.20 (Total supply proposed for E(g), B2, B8 uses)

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<ul style="list-style-type: none"> • Also proposing a new road access onto the A585 Fleetwood Road, north of the Stadium, between Plots B-C and Plots D-E, including a signalised junction • Plot G (South of the Stadium, west of Aldi foodstore, east of Coronation Way) (0.21 ha) – Previously consented for a hotel (now lapsed), but that hotel was subsequently included in the Stadium. Expected to be used as car parking. Land south of this plot is proposed for an Electric Vehicle charging facility, subject to planning. 	4,134 sqm of floorspace at average densities.	
Total		56.345			56.605

Source: BE Group, FBC, Other Stakeholders, 2024

- 7.21 Conversely, discussions with the agents and owners of FY11 Mill Farm Sports Village, Fleetwood Road, Wesham suggest a larger supply of 4.20 ha is available here and being marketed for E(g)/B-Class uses, in five plots.
- 7.22 Elsewhere, site FY6 DWP, Brunel Way, Whitehills (4.90 ha) remains available, but longer term growth here will depend on whether the DWP will retain any of the adjoining offices and, subject to that, the wider plans of the landowner, which are not known at this time.
- 7.23 As with Blackpool it is expected that most development will be for industrial and warehouse uses, reflecting wider demand. However, there are opportunities for office development in the supply. Most notably these include FY5 Blackpool Airport Enterprise Zone, Squires Gate (14.50 ha) where masterplan proposals are for a Knowledge Quarter comprising some 15, 2-3 storey offices, plus a data centre, of 1,881- 11,688 sqm each or 70,355 sqm of gross floorspace. Delivery of this will be subject to a range of factors including occupier demand, public sector support and the successful relocation of most Airport uses south. However, if successfully brought forward it would accommodate both local office sector growth and support inward investment.
- 7.24 At FY10 Whyndyke Garden Village, Preston New Road, Whitehills (20 ha) Agents for the site report that owners are in the process of negotiating a deal with a developer who will bring forward the site under the existing B2/B8 consent. However, that developer has a reported interest in provision of offices and light industrial uses here. Although that has yet to be confirmed. Alternatively, this site could provide larger B2/B8 options, with 120,000 sqm consented.

Geographic Distribution of the Fylde Realistic Employment Land Supply

- 7.25 Table 58 shows the geographic split of the realistic employment land supply in Fylde Borough. 84.7 percent of Fylde Borough's supply is focused at Whitehills and nearby Squires Gate. This reflects demand, however, with market interest focused on the western end of the M55 Corridor and linked to Blackpool. It does mean that there are limited growth options in Lytham, St Annes and serving Kirkham/Wesham. There are no growth options in smaller settlements such as Warton and Freckleton although stakeholders do not identify demand in these locations.

Table 58 – Fylde Location Assessment – Realistic Supply

Location	Realistic Supply	
	Total, ha	Percentage
Whitehills	33.47	59.1
Squires Gate	14.50	25.6
Wesham	4.20	7.4
Lytham	0.64	1.1
St Annes	3.80	6.7
Total	56.61	100

Source: BE Group, 2023

Site Scoring – Realistic Supply

- 7.26 Each Site, in the realistic land supply, has been scored against ten criteria relating to Site Location and Access, Development Prospects, Site Conditions and Availability. The maximum score possible is 100. The Scoring Criteria can be found in Appendix 6 and individual Site scores can be found in Appendix 7. Figure 47 shows the scoring for the ten sites identified as comprising Fylde Borough’s maximum realistic long-term supply. The assessment gives an appraisal of the overall quality of the land resource and provides one measure of which sites could be considered priorities for Local Plan allocation and which sites are of secondary value.
- 7.27 The highest scoring site is MUS3 Mill Farm Sports Village, Fleetwood Road, Wesham which is prominently located on an A Road close to M55 Junction 3. It offers clearly defined plots where plans for development are being actively progressed on some plots. ES2 Whyndyke Garden Village, Preston New Road, Whitehills also scores well, reflecting the large size of the available site and its strong position adjacent to Junction 4 of the M55, adjacent to the edge of Blackpool, as well as the reasonable prospects for delivery.
- 7.28 The lowest scoring site is FY11 Cropper Road East, Whitehills. This land is in the backlands, with no immediate plans for growth. Although it remains a development option in the core Whitehills area it is unlikely to be taken up until other, more accessible plots in the area have been completed.

Figure 47 - Fylde Borough Sites Scoring – Realistic Supply



Source: BE Group, 2023

WYRE BOROUGH EMPLOYMENT LAND SUPPLY

Baseline Land Supply – Wyre Borough

- 7.29 The starting point for the supply assessment is the Council's 31st March 2023 Employment Land Monitoring. This identified 52 employment sites, as set out in Table 59 and include:
- Nine Local Plan Allocations (Wyre Local Plan (2011-2031) (2023)) – 32.89 ha allocated
 - 11 sites with unimplemented planning consents within Existing Employment Areas – 14,538 sqm of net floorspace gain
 - 32 sites with unimplemented planning consents in other locations – 14,690 sqm of net floorspace gain.

Table 59 – Baseline Land Supply – Wyre

Site No. (Study Ref.)	Local Plan Ref. (Where Relevant)	Site	Size, ha	Comment
Allocated Sites				
Wyre Peninsula				
WY1	SA3/1	Fleetwood Dock and Marina, Fleetwood	6.32	An available supply of 6.32 ha, reduced from an original allocation of 7.50 ha reflecting the completion of the Fish Park scheme.
WY2	SA4	Hillhouse Technology Enterprise Zone, Thornton	13.00	
A6 Corridor				
-	SA3/2	Joe Lane, Catterall	-	Multiple planning consents have removed the land available for employment as of 31 st March 2023
WY3	SA2/2	Riverside Industrial Park Extension, Catterall	3.42	
WY4	SA2/3	South of Goose Lane, Catterall	1.00	
WY5	SA3/5	Land West of the A6, Garstang	4.68	
Rural Area				
WY6	SA2/1	Carrfield Works, Park Lane, Preesall Hill	0.34	
WY7	SA3/3	Land West of Great Eccleston	1.00	
WY8	SA3/4	Forton Extension, Forton	1.00	
Sub-Total			30.76	
Land in Existing Employment Areas with Unimplemented Consents				
-	-	Lofthouse Of Fleetwood, Maritime Street, Fleetwood (App. No. 16/00496/FUL)	-	166 sqm of net floorspace proposed, falls below size threshold for analysis
WY9	-	Former LCC Depot, Green Lane West, Garstang (App. No. 17/00177/FULMAJ)	0.50	843 sqm of net floorspace proposed, on 0.50 ha
	-	Former District Council Depot, Green Lane West, Garstang (App. No. 17/00210/FUL)		580 sqm of net floorspace proposed on the same site as the above.
WY10	-	Land At Copse Road, Fleetwood (App. No. 20/00128/FULMAJ)	2.11	6,498 sqm of net floorspace proposed, on 0.50 ha of net developable land
-	-	Lofthouse Of Fleetwood, Maritime Street, Fleetwood (App. No. 18/00334/FULMAJ)	-	2,952 sqm proposed. However, consent falls within a larger secure site and could only meet the needs of Lofthouse and not be offered to other companies

Site No. (Study Ref.)	Local Plan Ref. (Where Relevant)	Site	Size, ha	Comment
-	-	Unit 1, Oakenclough Mill, Oakenclough Road, Scorton (App. No. 18/00888/FUL)	-	2,049 sqm proposed. However, consent falls within a larger secure site and could only meet the needs of a single business and not be offered to other companies. Development also appears complete at time of writing.
-	-	Amusement Technical Rentals, Red Marsh Drive, Thornton Cleveleys (App. No. 18/01251/FUL)	-	88 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	Brockholes Auction Mart, Garstang Road, Claughton-On-Brock (App. No. 20/00232/FUL)	-	78 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	Land At Unit 17, Aldon Road, Unit G1, Cocker Avenue, Poulton-Le-Fylde (App. No. 20/00635/FUL)	-	370 sqm of net floorspace proposed, falls below size threshold for analysis
WY11	-	VMS Solutions, Butts Close, Thornton Cleveleys (App. No. 21/01411/FUL)	0.06	582 sqm proposed (Net Floorspace gain, above 500 sqm threshold for analysis)
-	-	West Lancs Caravans, Creamery Industrial Estate, Kenlis Road, Barnacre, (App. No. 22/00540/FUL)	-	332 sqm of net floorspace proposed, falls below size threshold for analysis
<i>Sub-Total</i>			2.67	
Other Land with Unimplemented Consents				
-	-	Formerly Interblast Ltd, 2 Ash Villas, Lancaster Road, Out Rawcliffe (App. No. 11/00827/FULMAJ)	-	539 sqm of net floorspace proposed, on 0.28 ha. However, proposal comprises the conversion of an existing industrial building, i.e. the proposal does not lead to an increase in employment land.
-	-	Siromer Tractors Taylors Lane Industrial Estate Taylors Lane Pilling (App. No. 14/00475/FUL)	-	506 sqm proposed. However, consent falls within a larger secure site and could only meet the needs of a single business and not be offered to other companies.
-	-	Pennine Garage, Lancaster Road, Forton (App. No. 15/00775/FUL)	-	271 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	New Hollins Garage, Brock Road, Great Eccleston (App. No. 17/00127/LAWP)	-	176 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	South Planks Farm, Garstang Road, Barton (App. No. 17/00245/FUL)	-	262 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	ND Civils, Hillfield Sower Carr Lane, Hambleton, Poulton-Le-Fylde (App. No. 17/00799/FUL)	-	704 sqm proposed. However, consent falls within a larger secure site and could only meet the needs of a single business and not be offered to other companies.
-	-	Bradley Hill Farm, Garstang Road, Claughton-On-Brock (App. No. 17/01179/FUL)	-	95 sqm of net floorspace proposed, falls below size threshold for analysis

Site No. (Study Ref.)	Local Plan Ref. (Where Relevant)	Site	Size, ha	Comment
-	-	The Old Smithy, Carr Lane, Stalmine, Poulton-Le-Fylde (App. No. 18/00401/FUL)	-	161 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	High Meadows, Reservoir Road, Barnacre-With-Bonds (App. No. 18/00465/FUL)	-	80 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	The Boat House, Blackpool Road, St Michaels-On-Wyre (App. No. 19/00052/FUL)	-	472 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	Stubbins House Farm, Stubbins Lane, Cloughton-On-Brock (App. No. 19/00457/FULMAJ)	-	1,120 sqm proposed. However, visual analysis suggests the scheme is complete at time of writing
-	-	Moss Cottage Farm, Lancaster Road, Out Rawcliffe (App. No. 19/00579/FUL)	-	740 sqm proposed. However, visual analysis suggests the scheme is complete at time of writing
-	-	Holmsleigh, Sower Carr Lane, Hambleton, Poulton-Le-Fylde (App. No. 19/00619/FUL)	-	168 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	Fell View Cottage Hall, Gate Lane, Preesall, Poulton-le-Fylde (App. No. 19/00784/FUL)	-	257 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	Greenhalgh Castle House, Castle Lane, Barnacre-With-Bonds (App. No. 19/01121/FUL)	-	96 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	Foggs Farm, Hobbs Lane, Cloughton-On-Brock (App. No. 20/00158/FUL)	-	56 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	Garden Centre Plants, Lancaster Road, Pilling (App. No. 20/00416/FUL)	-	1,028 sqm proposed. However, consent falls within a larger secure site and could only meet the needs of a single business and not be offered to other companies.
WY12	-	Land East of Brockholes Industrial Estate, Brockholes Way, Cloughton-On-Brock (App. No. 20/00497/LMAJ)	2.25	4,062 sqm of net floorspace proposed, on 2.25 ha
-	-	Middle Holly Field, Forton (App. No. 20/00504/FUL)	-	241 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	Riverside Industrial Park, Catterall Gates Lane, Catterall (App. No. 20/00639/FULMAJ)	-	388 sqm of net floorspace proposed, on 0.43 ha. Proposed for the exclusive use of a single business and in a secure site. Could only meet the needs of the single business and not be offered to other companies.
-	-	Cross House Farm, Moss Side Lane, Great Eccleston (App. No. 20/00979/FUL)	-	454 sqm of net floorspace proposed, falls below size threshold for analysis. Site identified as 0.42 ha in size, but appears smaller, approx. 0.20 ha, once areas of water treatment and environmental mitigation are excluded.

Site No. (Study Ref.)	Local Plan Ref. (Where Relevant)	Site	Size, ha	Comment
-	-	Sunnybank Industrial Estate, Grange Road, Hambleton, Poulton-Le-Fylde (App. No. 20/01030/FUL)	-	54 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	Kurloon, Horse Park Lane, Pilling (App. No. 20/01181/FUL)	-	19 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	Preston Plastics, Lancaster Road, Out Rawcliffe (App. No. 21/00088/FUL)	-	891 sqm proposed. However, consent falls within a larger secure site and could only meet the needs of a single business and not be offered to other companies. Development also appears complete at time of writing.
-	-	PM Groundworks, High View, Sower Carr Lane, Hambleton, Poulton-Le-Fylde (App. No. 21/00099/FUL)	-	20 sqm of net floorspace proposed, falls below size threshold for analysis
-	-	Direct Poultry Supplies, Bankfield, Preston Road, Inskip-With-Sowerby (App. No. 21/00561/FUL)	-	243 sqm of net floorspace proposed falls below size threshold for analysis
-	-	Daedalian Glass Studios, Smithy Farm, Carr Lane, Hambleton, Poulton-Le-Fylde (App. No. 21/00595/FUL)	-	450 sqm of net floorspace proposed falls below size threshold for analysis
WY13	-	Victoria Bingo, Poulton Road, Fleetwood (App. No. 21/01273/FULMAJ)	0.14	868 sqm proposed (Net Floorspace gain, above 500 sqm threshold for analysis)
-	-	Brick House Farm Cottages, Brick House Lane, Hambleton, Poulton-Le-Fylde, Lancashire, FY6 9BG (App. No. 21/01414/FUL)	-	74 sqm of net floorspace proposed falls below size threshold for analysis
-	-	Barnfield, Sower Carr Lane, Hambleton, Poulton-le-Fylde, Lancashire, FY6 9DJ (App. No. 22/00613/FUL)	-	246 sqm of net floorspace proposed falls below size threshold for analysis
-	-	Unit 1, Jim Brown Fabrication, Lancaster Road, Pilling, Lancashire, PR3 6AU (App. No. 22/00698/FUL)	-	450 sqm of net floorspace proposed falls below size threshold for analysis
-	-	Land Hill Farm, Ghants Lane, Hambleton, Poulton-Le-Fylde, Lancashire, FY6 9DG (App. No. 22/00806/FUL)	-	192 sqm of net floorspace proposed falls below size threshold for analysis
<i>Sub-Total</i>			2.39	
Total			35.82	

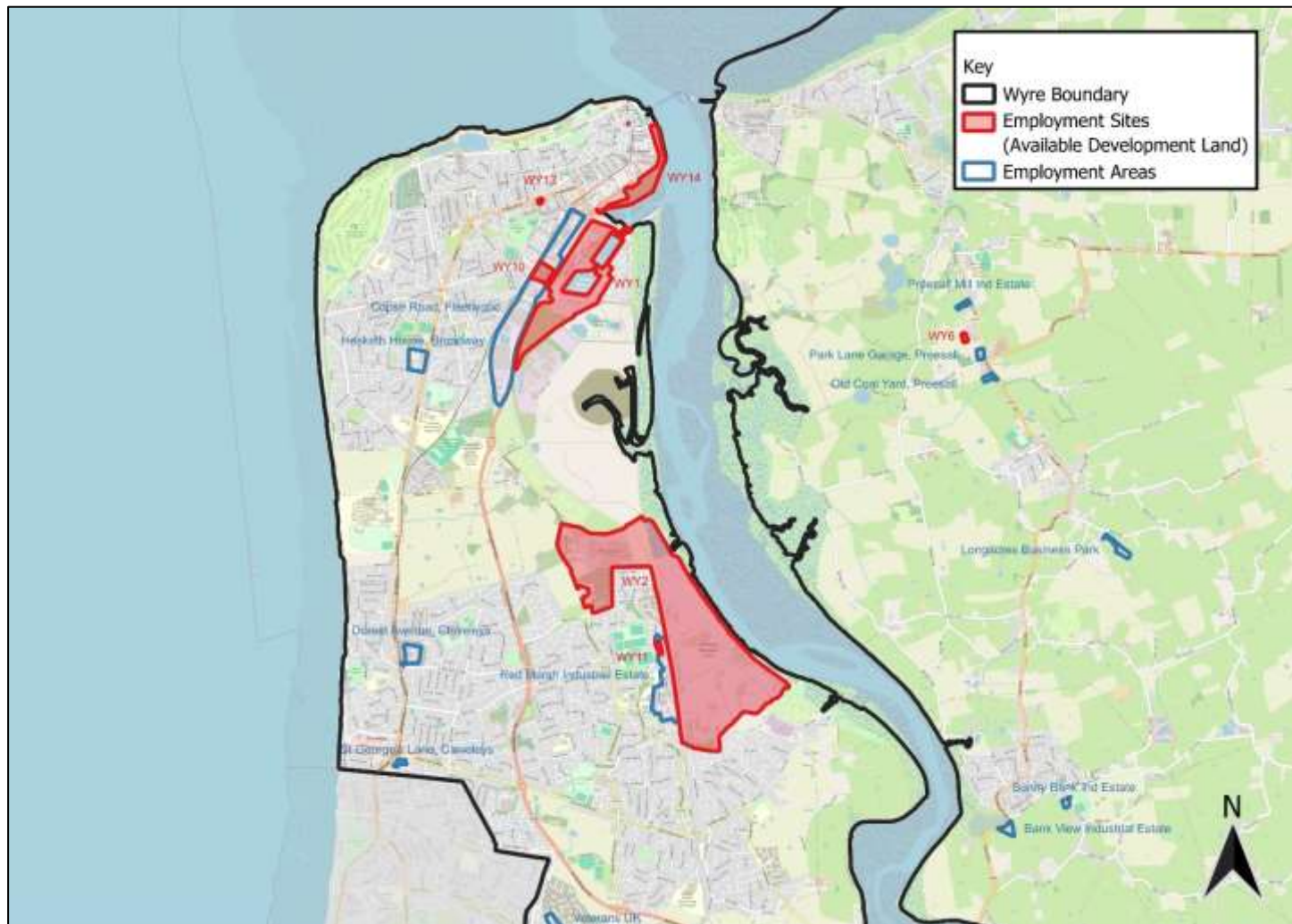
Source: BE Group, WBC, 2023

- 7.30 In terms of the nine allocated sites, all employment land at Joe Lane, Catterall has been lost to consents for alternative uses. This site is not considered further. The site area of Site WY1 Fleetwood Dock and Marina, Fleetwood has been adjusted to reflect net completions.
- 7.31 For the 43 recorded consents, the majority have been excluded from further analysis for the following reasons:
- Reflecting Para 009 (Reference ID: 3-009-20190722) of Planning Practice Guidance Note ‘Housing and Economic Land Availability Assessment’ consents for less than 500 sqm of floorspace, or 0.25 ha of land, are excluded from further consideration in this Study
 - Redevelopment proposals, i.e., the re-use of land already in E(g)/B-Class use, with no net gain of employment land, are also excluded from the realistic supply
 - Several consents are for extensions to existing E(g)/B2/B8 facilities which, due to the design of the proposed extension(s), would only support the growth of that particular unit and that particular business. The new space could not be offered to other businesses in the Borough and support broader economic growth. Such sites are not considered further.
 - Visual analysis has also identified some consents which were complete, externally at least, at the time of the analysis.
- 7.32 As Table 59 shows, excluding non-relevant sites, the supply reduces to 13 sites and 35.82 ha, including:
- Eight Local Plan Allocations (Wyre Local Plan (2011-2031) (2023)) – 30.76 ha
 - Three sites with unimplemented planning consents within Existing Employment Areas – 2.67 ha
 - Two sites with unimplemented planning consents in other locations — 2.39 ha.
- 7.33 Two other sites are safeguarded for E(g), B2, B8 uses in the Wyre Local Plan (2011-2031) (2023) and are also reviewed here to consider their suitability to become future employment land allocations:
- Site WY14 (Local Plan Ref. SA5): Port of Fleetwood, Fleetwood (7.60 ha). The site of the former Fleetwood Ro-Ro Ferry, the land was safeguarded for port related development. *“Other employment development within use class B1 (now part of class E(g)), B2 and B8 will be permitted where it is demonstrated that the development would benefit from the specific port location and it will not prejudice the long term operation of the Port.”*
 - Site WY15 (Local Plan Ref. SA7): Brockholes Industrial Estate Extension, Catterall (32.51 ha) was safeguarded in the Wyre Local Plan (2011-2031) (2023) for E(g), B2, B8 uses

“to establish the principle of employment development on this land and stimulate the market to resolve issues and bring forward the site.” This site is also reviewed here to consider its suitability to become a future employment land allocation.

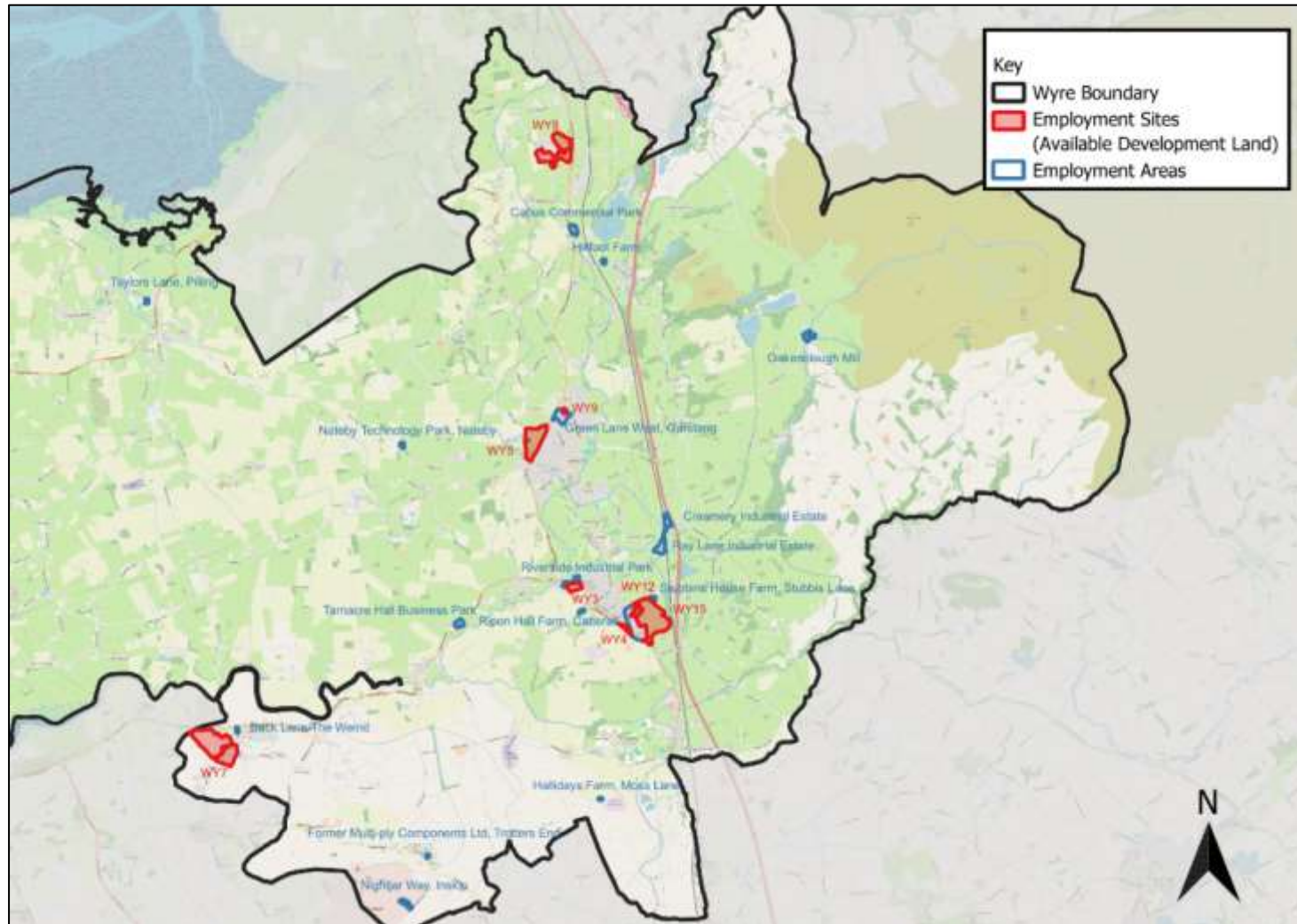
7.34 This baseline supply is set out in Figures 48-50.

Figure 48 – Wyre North West Baseline Employment Land Supply and Related Employment Areas



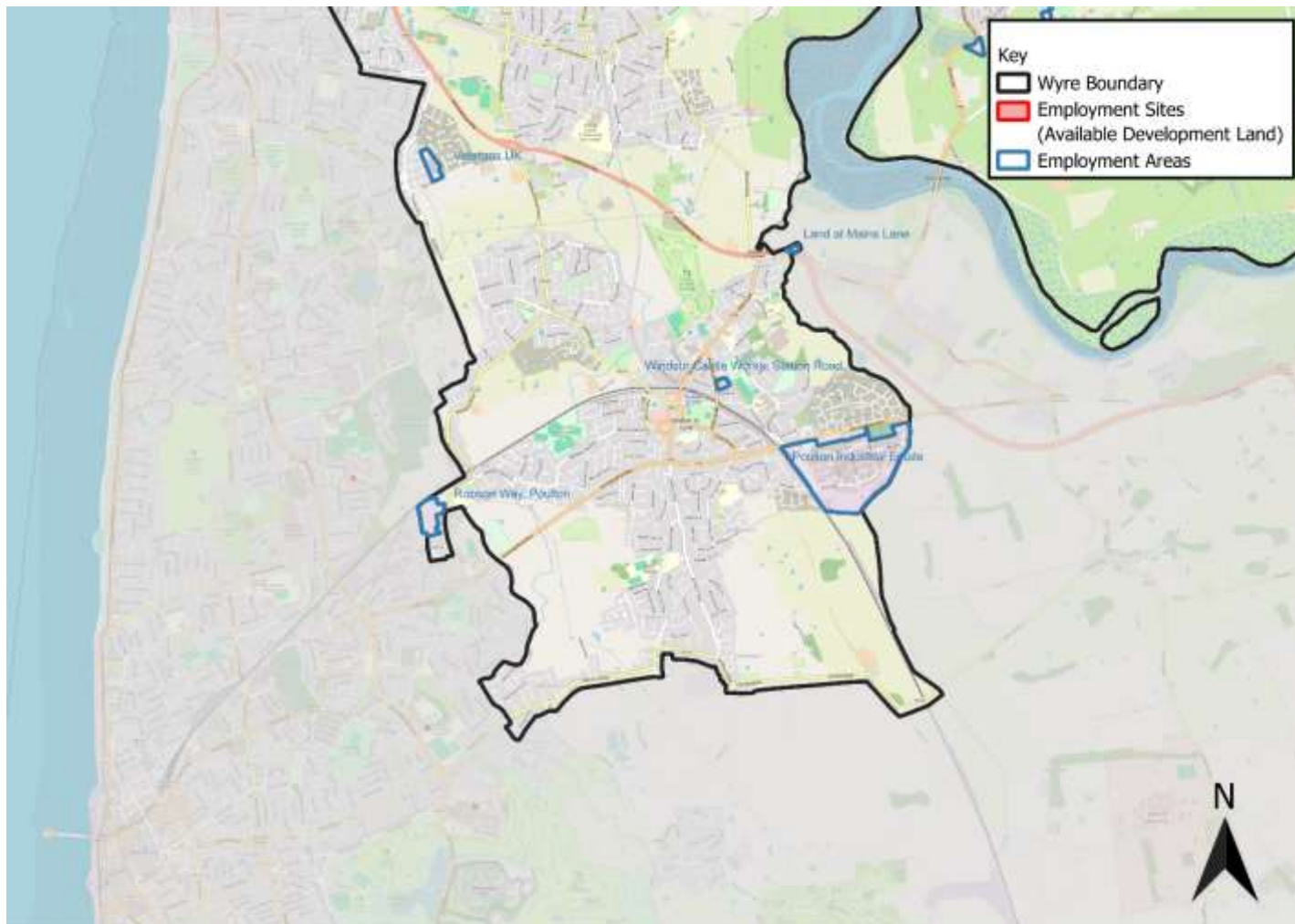
Source: BE Group, 2024

Figure 49 – Wyre East Baseline Employment Land Supply and Related Employment Areas



Source: BE Group, 2024

Figure 50 – Wyre South West Baseline Employment Land Supply and Related Employment Areas



Source: BE Group, 2024'

Employment Sites Analysis

7.35 Table 60 provides a summary of the assessment of the 13 employment sites, and two safeguarded options, as outlined above, completed by BE Group. It considers:

- The Baseline Site supply, hectares
- Comments on landowner/developer plans for the Site, and its deliverability
- Likely use of the site
- The realistic employment land supply available to meet identified needs.

7.36 As Table 60 shows of a baseline land supply of 35.82 ha of land in 13 sites (excluding safeguarded sites), **35.08 ha in 11 sites** appears realistically available to meet local needs. This reflects the following adjustments:

- At WY1 Fleetwood Dock and Marina, Fleetwood (8.1 ha) although plans are evolving, land within the Docks is most likely to be taken up for leisure, retail and residential uses. The only land which appears likely to be taken up for E(g)/B-Class uses is the Lofthouse (Fisherman's Friend) site which has a Member resolution to approve consent (subject to the signing of a Section 106 agreement), for a 34,263 sqm B2 production facility for that business, on 8.1 ha. That land is most likely to be taken up for the exclusive use of Fisherman's Friend but, should that company ultimately not need all the land, plots could be offered to other businesses. Thus the 8.1 ha remains in the realistically available supply.
- WY2 Hillhouse Technology Enterprise Zone, Thornton (10.96 ha) is a complex site with constantly evolving plans on 22 development plots, the deliverability of many in the north being dependant on a major investment in highways infrastructure which has yet to be confirmed. Any consideration of this location can thus only ever be a point in time analysis. At the time of writing, however, discussions with both EZ managers and NPL suggest that of a total development land supply of 61.62 ha, most land is proposed for specialist energy generation uses, housing or held to meet the needs of established businesses in Hillhouse. This leaves five plots (E, H, J, I and L totalling 10.96 ha) available to meet a broader range of strategic and local needs. These five plots could provide some 42.733 sqm of floorspace. Plots G, M and V4 totalling 12.19 ha may also provide some E(g)/B-Class redevelopment options over the next Local Plan Period, but there is little certainty about the scale and extent of what might be brought forward here.
- WY6 Carrfield Works, Park Lane, Preesall Hill (0.34 ha) forms part of the wider Wyre Building Supplies facility. Due to its backland position it could not be offered to other

parties and remains expansion land for this facility only, rather than broader employment land. Accordingly, it is excluded from the realistic supply.

- Of the five relevant planning consents Site WY13 Victoria Bingo, Poulton Road, Fleetwood (0.14 ha) is proposed for an upper floor re-use for small scale storage only rather than meeting business needs for accommodation. Accordingly, it is excluded from the realistic supply.

Table 60 – Wyre - Summary of Employment Sites Assessment (Land Supply)

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
Allocated Sites					
Wyre Peninsula					
WY1	Fleetwood Dock and Marina, Fleetwood	6.32	<p>Dock and marina facilities, including a high quality retail park in the north and older industrial, warehouse facilities in the south as part of a secure port area, along with areas of development land.</p> <p>Multiple owners (inc. Associated British Ports, ABP Property Development Company Ltd, Heaton Estates Limited and others)</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Large areas of the site are in Flood Zone 3, although protected by flood defences • A range of low quality buildings on the site • Likely contamination from previous uses • Fleetwood Marsh Nature Reserve adjacent • The site is located near to the River Wyre estuary which is a European designated site: Morecambe Bay and Duddon Estuary Special Protection Area (SPA), Morecambe Bay Special Area of Conservation (SAC) and Morecambe Bay Ramsar site. The estuary is also a Site of Special Scientific Interest • A Biological Heritage Site is located within part of the south eastern extent of the site. <p>By sub-area the following can be noted:</p> <ul style="list-style-type: none"> • The Affinity Outlet Centre is in full use and unlikely to see significant change. Any small undeveloped plots within this scheme, will likely be used for car parking/public access rather than new development. Refurbishment may see some retail/hot food units reversed so they look out onto the waterfront. Presently almost all units face away from the marina. • In terms of the Docks to the south, the main landowner, ABP, report some 5.40 ha of brownfield development 	<p>Within the docks themselves, owner ABP expect that most future development will be for retail, leisure and hot food uses, supporting an expansion of the marina. At the 1.43 ha Fylde Ice and Cold Storage Co. building, which is at least partially empty, a change of use on this site appears likely for a non-employment use. It is therefore not assumed this site is available for E(g), B2, B8 employment development. Given landowner intentions and the viability constraints associated with recently delivering Neptune Court, no available employment land is assumed in the main docks area.</p> <p>The remaining employment land within the allocation is thus limited to the 8.10 ha Land south of Windward Avenue site, which has a Member resolution to approve consent (subject to the signing of a Section 106 agreement) for a 34,263 sqm B2 production facility for Lofthouse (Fisherman's Friend) and is expected to be taken up in the short term. That land is most likely to be taken up for the exclusive use of Fisherman's Friend but, should that company ultimately not need all the</p>	8.10 (Based on planning application estimate of the Fisherman's Friend site)

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p>land is available in the south, between the dock and Windward Avenue. This includes the Former Fisherman’s Wharf buildings which are now being cleared. Another 2.30 ha of development land is available on the north west side of the Dock, between the Dock and Dock Avenue. ABP report no demand for port related uses here, reflecting strong competition from Heysham Port and the fact that Fleetwood’s fishing fleet is now negligible. The completed Neptune Court, which due to viability required grant funding circa £4 million, is expected to meet the needs of the existing fish/food processing businesses of Fleetwood. General industrial or warehouse uses may be possible here, reflecting the good demand for such uses across the Fylde Coast, but there are other sites along the A585 which are more prominent and accessible, and could better meet local needs. The most likely long term use of this land would be to extend the Marina south, increasing the number of leisure boat births from 168 to 400 and developing the land for complimentary retail, leisure and food uses. Undeveloped land on the east side of the docks, between the docks and the Windward Avenue Housing Estate, would continue to be used for the storage and maintenance of private boats, associated with the marina.</p> <ul style="list-style-type: none"> • Land south of Windward Avenue, 8.10 ha based on the planning application estimate, has a Member resolution to approve consent (subject to the signing of a Section 106 agreement), for a 34,263 sqm production facility for Lofthouse (Fisherman’s Friend) (App. No. 22/00774/FULMAJ). One impact of this is that the development of this site would prevent any Fleetwood main line railway terminus on the land, however it would not completely block off any access for any potential single track railway linking further north nearer Fleetwood Town Centre. • On the A585 Amounderness Way frontage the Fylde Ice and Cold Storage Co premises are separately owned. Fylde Ice have closed down its production factory and in 	<p>land, plots could be offered to other businesses. Thus the 8.10 ha remains in the realistically available supply.</p>	

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p>2021 sold the 1.43 ha site to Heatons Estates. Stakeholders indicate that Heatons is considering the conversion of the properties although planning consent has yet to be sought for any such scheme. The Fylde Ice cold storage facility is understood to be still in use, rented out to other businesses to meet peak demand.</p> <ul style="list-style-type: none"> Halite Energy Group is a tenant on the docks. It previously had an option/agreement in place to pump saline solution from Salt caverns at Preesall to the Docks, as part of the Halite Energy underground gas storage project. This national infrastructure project has extant permission, but no land has been taken up in Docks to date. The future of Halite’s operations on Fleetwood Dock is confidential however. 		
WY2	Hillhouse Technology Enterprise Zone, Thornton	13.00	<p>Large industrial site, secure in places, accommodating a diverse range of businesses and energy infrastructure, on the edge of the Thornton settlement area and the Wyre Estuary.</p> <p>Multiple owners (inc. Dragon Power Developments, Le-Fylde Estates (NPL), Inovyn Chlorvinyls) NPL manage and market the site.</p> <p>Site still categorised as an Enterprise Zone although all EZ benefits finished in 2021.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> Site contamination from historic uses Trees onsite Much of the site falls into Flood Zones 2 and 3. Some flood defences in place Two main rivers, Springfield and Royles Brook are located within the site Constraints on the capacity of the potable and foul water networks Various utilities, including a gas line cross the eastern side of the site 	<p>A diverse range of projects are being progressed across the 22 plots. There is a clear focus on energy generation and related infrastructure, with several small generation facilities completed and a range of larger facilities in the pipeline. Hydrogen is intended to power major occupier Victrex and provide fuel stations at Fleetwood Port and elsewhere.</p> <p>Good demand is reported from local businesses in the aggregates, plastics recycling, and civil construction sectors, as evidenced by the critical mass of such businesses already active on the site.</p> <p>Overall, the 22 identified plots offer 61.62 ha of land, but the bulk of this is proposed for specialist energy generation uses, housing or held to</p>	10.96 (available local/strategic supply)

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<ul style="list-style-type: none"> • New highway access to traverse the rail line required to unlock the northern area • Public rights of way on the edges of the site • The site is located near to the River Wyre estuary which is a European designated site: Morecambe Bay and Duddon Estuary Special Protection Area (SPA), Morecambe Bay Special Area of Conservation (SAC) and Morecambe Bay Ramsar site. The estuary is also a Site of Special Scientific Interest. • The site includes land connected with ecological mitigation and compensation that was provided to offset ecological impacts associated with a previous residential development at Bourne Road. <p>22 development plots were identified in the Hillhouse Technology Enterprise Zone Masterplan (2018) (see Figure 2, Page 20), labelled A-U. As part of this exercise, Wyre Borough Council has reviewed and amended the plots, reflecting changing conditions on the ground and evolving plans for change, although this will be subject to wider review as part of the Enterprise Zone masterplan refresh. This gives 22 plots totalling 61.08 ha. A map showing these plots is provided after the Hillhouse Proforma in Appendix 5b - Wyre Existing Employment Land Supply Proforma. These are considered here, reflecting discussions with Enterprise Zone managers and NPL:</p> <ul style="list-style-type: none"> • Plot A (0.45 ha, with 0.27 ha undeveloped) – owned by Conrad Energy and partly developed for energy generation facilities, Energy Peak Plant. It is assumed further development here will be for the expansion of this use • Plot B1 (1.10 ha) – Owned by Le-Fylde Estates and BXB. Consent being sought for 48 homes here (App. No. 23/00122/FULMAJ). 	<p>meet the needs of established businesses in Hillhouse. This leaves five plots (E, H, J, I and L totalling 10.96 ha) available to meet a broader range of strategic and local needs and considered as available supply for this Study. These five plots could provide some 42.733 sqm of floorspace.</p> <p>Plots G, M and V4 totalling 12.19 ha may also provide some E(g)/B-Class redevelopment options over the next Local Plan Period, but there is little certainty about the scale and nature of what might be brought forward here.</p> <p>Most development in the north of Hillhouse will be dependent on delivery of a new road access across the railway. Stakeholders report some progress is being made on this, with concept designs for the new access bridge now commissioned. However, the deliverability of all relevant infrastructure will need to be confirmed before any allocation of employment land was made here in the new Local Plan.</p>	

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<ul style="list-style-type: none"> Plot B2 (0.37 ha) – Owned by Le-Fylde Estates and BXB. Application approved for a 750 sqm retail use (App. No. 22/00845/OUT). Plot D. Former C1, C2 and D sites now merged as new Plot D (8.51 ha) Owned by Dickie and Moore Homes, Le-Fylde Estates and BXB. All proposed for housing, with some development completed. Planning App. No. 23/00215/OULMAJ in north parcel pending for 130 homes; App. No. 23/00338/FULMAJ approved for 81 homes; also includes App. No. 19/00347/FULMAJ which gives planning permission for 41 homes, with 23/00349/FUL pending to increase the dwelling numbers up to 42. New Plot E (2.56 ha) – Le-Fylde Estates own. New area created on west of rail line to form new northern triangle. Proposed for speculative office development of up to 29,922 sqm. Old Plots E-F to be public open space only. Lagoon to be retained. Plot G (1.02 ha) – Le-Fylde Estates/Brownfield Land Holdings own. Proposed for a services hub including food and drink, hotel, gym, nursery plus some E(g) office uses of up to 4,090 sqm. Plot H (2.26 ha) – Le-Fylde Estates/Brownfield Land Holdings own. Proposed for smaller B2 units, up to 8,800 sqm. Plot I (3.53 ha) – Le-Fylde Estates/Brownfield Land Holdings own. Larger B2 production facilities in the green energy sector, some 12,077 sqm of space Plot J (1.43 ha) – Plot J (South) is partly occupied by Sid Hill Transport for HGV parking, with a small workshop onsite. Proposals for a battery facility here. Longer term potential for B8 uses here up to 5,581 sqm. Plot K1 (1.80 ha) – Le-Fylde Estates/Brownfield Land Holdings own. Proposed for an energy from waste plant 		

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p>of 6,055 sqm by Sesona Hill House, with County Council App. No. LCC/2023/0003 pending.</p> <ul style="list-style-type: none"> • Plot K2 (5.16 ha) – Le-Fylde Estates/Brownfield Land Holdings own. Proposed for an energy from waste plant of 18,580 sqm. Further details are confidential at this time. <p>N.B. Other aspirations for sites H-K include a Data Centre.</p> <ul style="list-style-type: none"> • Plot L (1.18 ha) – Le-Fylde Estates/Addison Engineering own. Some land to be taken up by the expansion of Addison Engineering east. Interest from other parties such as Lancashire Waste Management reported. NPL also have the aspiration for a 17 unit trade and retail park here. • Plot M (3.37 ha) – Le-Fylde Estates own. Land and property in use by a range of occupiers. The relocation of some occupiers into the retained Vinnolit buildings would allow at least a partial redevelopment here. Longer term aspirations include some 2,787 sqm of spec offices although this would be dependent on the viability of such uses here so remains uncertain. The site contains an existing NPL run office block of 32 rooms, half occupied. Good demand reported from smaller firms. • Plot N (including former Plot O) (7.83 ha) – Le-Fylde Estates and Dragon Power Developments own. Proposed for a hydrogen production facility, subject to public grant funding support. An initial 10MW pilot production plant is proposed. If successful, a larger 100MW facility is likely • Plot P (4.92 ha) – Le-Fylde Estates and a private individual own. In use by several businesses including Greens Environmental, mostly for open storage. It is expected that several businesses will relocate away from the plot and possibly out of the EZ completely. AGC Chemicals is likely to take up any resulting vacant land for chemicals storage and production. The site may offer the longer term prospect for a more comprehensive 		

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p>regeneration, for up to 19,169 sqm of floorspace, but there is no certainty of this at the time of writing</p> <ul style="list-style-type: none"> • Plot Q (0.83 ha) – Asahi Glass Fluoropolymers UK own. Site comprises York House, occupied by AGC Chemicals who may relocate uses elsewhere in Hillhouse. Interest from other businesses in the property is reported but if the site is redeveloped it is most likely to be for housing, reflecting the adjacent residential uses. • Plot R (0.85 ha) – Le-Fylde Estates own. Western half of the site now developed for 20 MW Gas Powered Generator from Hillhouse Generation. Some remaining land of interest to construction companies for open storage. • Plot S (1.63 ha) – Sold to Victrex for the expansion of that business. Part of the plot is occupied by two other businesses, who, it is expected will relocate outside of Hillhouse. Victrex will expand onto their plots to gain additional production and warehousing space. • Plot T (0.54) – Asahi Glass Fluoropolymers UK own. Now built out by AGC Chemicals, who operate the complex to the south • Plot U (0.93 ha) – Sold to Victrex for the expansion of that business. <p>Two further sites have been released in the south east by Vinnolit:</p> <ul style="list-style-type: none"> • Plot V1 (2.25 ha) – Le-Fylde Estates and Inovyn Chlorvinyls own. Proposed for an energy from waste facility, by Xetrov Energy, generating up to 20 MW. A screening opinion has been submitted to LCC for this (App. No. SCR/2023/0004). Expected to come online by 2025 • Plot V4 (7.80 ha) – Le-Fylde Estates and Inovyn Chlorvinyls own. Multiple occupiers including Daily Cranes, Karpa BW Engineering Solutions, Express Trade, The Event Company and Thornton Storage. 		

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p>Proposal for Bottom Ash Recycling on 4.85 ha with Fortis. Interest for aggregate storage here as well. A Waste to Energy company is about to start refurbishment of an 8,361 sqm warehouse to convert it to a WTE plant. This is expected to complete in two years. Overall, it is not certain what additional land will become available moving forward.</p> <p>Of the 22 plots totalling 61.62 ha:</p> <ul style="list-style-type: none"> • Three plots (B1, B2, D totalling 9.97 ha) have been consented for housing or have active applications for housing and related services. Site Q (0.83 ha) may also be developed for housing in the long term • Six plots (A, K1, K2, N, R and V1 totalling 18.34 ha) are primarily developed for, or proposed for, specialist energy generation infrastructure and facilities • On four plots (P, S, T, U totalling 8.02 ha) available land has been, or is expected to be, held for the exclusive use of the two main occupiers of Hillhouse – AGC Chemicals and Victrex – and not available to meet wider needs <p>This leaves five plots (E, H, J, I and L totalling 10.96 ha) available to meet a broader range of strategic and local needs, with E (2.56 ha) proposed for office uses and the remainder for B2 uses of varying sizes.</p> <p>Finally, plots G, M and V4 totalling 12.19 ha may provide some E(g)/B-Class redevelopment options over the next Local Plan Period, but there is little certainty about the scale and nature of what might be brought forward here making these windfall opportunities.</p>		

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
A6 Corridor					
WY3	Riverside Industrial Park Extension, Catterall	3.42	<p>Rectangular area of greenfield agricultural land, south of Collinson and close to the A6 Preston-Lancaster Road, on the edge of Catterall.</p> <p>Orchard Farm own</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Trees onsite • Housing adjacent • North and north east of the site falls into mostly Flood Zone 2 associated with the River Wyre • Site is constrained in terms of access, blocked from main road access by other ownerships in all directions <p>Collinson, located to the north, proposed the land should be an allocation for employment in the Adopted Local Plan to support its business expansion.</p> <p>Collinson subsequently received Outline Consent for an extension comprising 6,000 sqm of B2 employment and 121 car parking spaces (App. No. 16/00955/OULMAJ). However, Collinson subsequently indicated that the landowner is no longer willing to sell the site to them.</p> <p>Over the past 5 years Collinson report that it has invested in R&D for two new product lines, and is looking to expand sales globally, while manufacturing more component parts locally. However, Collinson’s existing facilities are at capacity so long term growth will require the doubling, tripling or more of its operations, i.e., up to 29,500 sqm of extra space.</p> <p>To meet this need Collinson remain interested in this site, but it is reported that it will need a change of ownership to achieve this (i.e., passing the site to the next generation of private owners). If this occurs, Collinson will again seek to acquire this site either to develop for its own uses or to deliver premises, with a developer partner, to support the</p>	<p>Site remains of interest to adjacent business Collinson, subject to acquisition. Site would most likely meet the businesses own needs but could be made available, at least in the short-medium term to support other business growth for industrial and warehouse uses. The site could provide 13,338 sqm of floorspace at standard densities.</p>	3.42

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			growth of other businesses in the Garstang/Catterall area. Collinson report good local demand for industrial/warehouse uses locally. Would develop space for short-medium term occupation by others on the assumption that Collinson would take it up over the long term for its own needs.		
WY4	South of Goose Lane, Catterall	1.00	<p>Irregularly shaped parcel of greenfield land, fronting the A6 Preston-Lancaster Road on the southern edge of Catterall, adjacent to an existing industrial estate.</p> <p>Toll Bar own</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Dwelling adjacent • Trees onsite • A High Pressure gas pipeline runs east – west across the southern part of the site. Three United Utilities pipelines also run east – west across the site, to the north and south • A Grade II listed cross base is located to the north west of the site. <p>As of June 2023, the site has Reserved Matters Consent for a mixed employment site consisting of a 400sqm café, a 1,212 sqm warehouse and 1,502 sqm of light industry (App. No. 22/00366/REMAJ following outline planning permission 20/00998/OUTMAJ and various Discharges of Conditions). Employment premises to be divided into 11 units of 200-337 sqm each.</p>	<p>Site recently secured consent for a mixed light industrial/warehouse scheme of smaller units. This reflects the good demand for smaller industrial and storage space across the Fylde Coast. 2,714 sqm is consented.</p> <p>The site owners/applicant is currently seeking planning permission for a revised scheme with a greater retail focus, including a MacDonalds hot food restaurant, Starbucks drive through coffee shop with the residual units used for a mixture of E(g)/B-Class employment and trade counter uses. If consented, this would therefore reduce the net area of land and premises in E(g)/B-Class employment use.</p>	1.00
WY5	Land West of the A6, Garstang	4.68	<p>Large irregularly shaped area of greenfield agricultural land, located off the A6 Preston-Lancaster New Road, located within the west of the Garstang settlement area and east of Garstang Marina.</p> <p>Multiple private individuals own</p> <p><i>Constraints:</i></p>	<p>It is likely that the housing element of the mixed use scheme will be progressed in the short term. The employment land will not be progressed at this time, but the housing development will open up the wider location for future phases</p>	4.68

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<ul style="list-style-type: none"> • Trees onsite • Several small waterbodies cross the site • Housing adjacent • Possible site contamination from historic landfill • Lancaster Canal Biological Heritage Site forms the southern boundary of the site • An overhead cable runs north/south towards the eastern boundary • Two large diameter drains and a water main cross the site • Public rights of way cross the boundaries of the site • Cathouse Bridge adjacent to the southern end of the site is a Grade II listed structure. <p>Site is subject to two alternative schemes for mixed use development comprising up to 270 dwellings, 4.68 ha of Employment land (some 5,740 sqm E(g) and B8) in the north east, a convenience store (up to 375 sqm sales area) and coffee shop (up to 235 sqm sales area). App. No. 14/00458/OULMAJ has outline consent and allows for signalised junction with the A6 Preston-Lancaster New Road. The alternative outline scheme App. No. 16/00241/OULMAJ has a Committee resolution to approve subject to the signing of a Section 106 agreement and would allow for a roundabout access with the A6.</p> <p>A Reserved Matters application was submitted in 2020, for this site (App. No. 20/00340/RELMAJ). It was understood this was primarily submitted to keep the original outline permission extant.</p> <p>Housebuilders Story Homes and Jones Homes are now supporting the housing element of the scheme. A final Outline planning application was submitted in 2022 for the above scheme but with a signalised crossing on the A6 instead of a pedestrian underpass (App. No. 22/00423/OULMAJ). The applications were approved by Committee in summer 2024.</p>	<p>of development. This will provide a future employment development option, in a prominent location in the A6 Corridor, serving the east of Wyre Borough.</p> <p>5,740 sqm of E(g) and B8 uses are proposed in the existing consents on a 4.68ha plot.</p> <p>At the time of writing there were questions about whether the identified market interest, for the employment plot, can deliver a financially viable scheme. However, market interest will be hard to measure until the site access, necessary for a deliverable scheme, is agreed and ideally brought forward with the housing element. If interest remains provably insufficient, for viability, even after access is agreed/delivered then it is likely that alternative uses will be sought here.</p>	

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p>Stakeholders report that Story Homes and Jones Homes are strongly interested in progressing the housing element of the scheme in the short term, subject to planning, which will open up the wider site to development, including the employment element.</p> <p>These housebuilders will not deliver the employment element, although this plot remains available for future development. The employment site has been marketed for several years without attracting viable interest, although businesses and developers are unlikely to commit to the location until access is agreed and ideally delivered. It is also possible the applicants may seek consent for other uses here, including retail.</p>		
Rural Area					
WY6	Carrfield Works, Park Lane, Preesall Hill	0.34	<p>Backland greenfield plot, to the rear of a large builders merchants in an isolated rural location.</p> <p>The Managing Trustees of The John Wilkinson and Son (Builders) Retirement and Death Benefit Scheme own.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> Backland site, only accessible through the existing Carrfield Works. <p>In 2017 Wilkinson Group received consent for a change of use of land to B8 storage use (App. No. 16/01054/FUL). That consent has now expired.</p>	The land forms part of the wider Wyre Building Supplies facility. Due to its backland position it could not be offered to other parties and remains expansion land for this facility only, rather than broader employment land.	-
WY7	Land West of Great Eccleston	1.00	<p>Greenfield land, located within the south west of the Great Eccleston settlement area, and extending south west of the Great Eccleston settlement area, extending south east from the A586 Garstang Road across Copp Lane. Land south east of Copp Lane is now developed for housing.</p> <p>Multiple owners including Avant Homes, Newbury Homes, Rowland Homes, private individuals and others. Avant is now delivering the Duchy part of the site and have submitted a reserved matters application.</p>	The housing development will open up an employment site of 1 ha, fronting the A586 Garstang Road. As with the 1 ha employment site at SA3/4: Forton Extension, Forton, there are no firm plans for delivery of this plot, but it remains available as a prominently located development option in a rural area with few other alternatives. It	1.00

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p><i>Constraints:</i></p> <ul style="list-style-type: none"> Assumed limited on the 1 ha site specifically available for employment uses. Site will be bounded by housing and front onto the countryside, however. <p>Land north of Copp Lane has Outline consent for up to 350 dwellings together with 1ha of employment uses in the north west, partly fronting and accessed from the A586 Garstang Road, a health centre, community hall, primary school, local convenience store and public open space (App. No. 19/00860/OULMAJ).</p> <p>The consent was secured by Metacre (Northern Trust). In 2022 the site, including the employment site was sold to Duchy Homes. In 2023, Duchy and Bellway Homes secured Reserved Matters consent but for the housing only (App. No. 22/00761/RELMAJ).</p> <p>At the time of writing there were no firm plans for delivery of the employment element.</p>	<p>remains available to meet local needs. Site could deliver 3,900 sqm of floorspace at standard densities.</p>	
WY8	Forton Extension, Forton	1.00	<p>Areas of greenfield land surrounding the Forton settlement area, to the south and east, with frontage to the A6 Preston-Lancaster Road. Sites in the east are being developed for housing, land in the south remains in agricultural use.</p> <p>Multiple owners including Persimmon Homes, Lancaster Roman Catholic Diocesan Trustees Registered and others.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> Assumed limited on the 1 ha site specifically available for employment uses. Site will be bounded by housing, however. <p>Land to the east of Forton, north and south of School Lane, owned by Persimmon Homes, has Outline consent for 195 homes (later reserved matters for 184 homes), 1ha of E(g), B2, B8 employment land in the south east, fronting the A6 Preston-Lancaster Road, a community centre and shop (App. No. 18/00469/OULMAJ and 22/00735/RELMAJ). The application site is divided by an existing road. The reserved</p>	<p>The housing development will open up an employment site of 1 ha, fronting the A6 Preston-Lancaster Road which will be marketed for employment uses.</p> <p>Initial market testing suggests limited market interest at this time, but a more extensive marketing exercise may identify requirements. The site provides a prominently located development option in a rural area with few other alternatives, particularly if employment options associated with the Bailrigg Garden Village to the north are not realised. It</p>	1.00

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p>matters consent is for 145 homes to the north of the road, now under development by Persimmon Homes, and nearly 40 homes to the south of the road. A further outline application 23/01031/OULMAJ has been received by the Council proposing a revision to the off-site highways works. This is undecided at the time of writing.</p> <p>Persimmon indicated that it will deliver the housing, put in infrastructure for the employment site and market the land to developers/businesses, who would separately develop the site. It has had informal discussions with agents but did not identify strong demand for E(g), B2, B8 uses at present in this relatively isolated location. There are thus no formal delivery plans for employment uses here, at this time.</p>	<p>remains available to meet local needs.</p> <p>Site could deliver 3,900 sqm of floorspace at standard densities.</p> <p>At the time of writing there were questions about whether the identified market interest, for the employment plot, can deliver a financially viable scheme. However, market interest will be hard to measure until the site access, necessary for a deliverable scheme, is agreed and ideally brought forward with the housing element. If interest remains provably insufficient, for viability, even after access is agreed/delivered then it is likely that alternative uses will be sought here.</p>	
<i>Sub-Total</i>		30.76			30.16
Land in Existing Employment Areas with Unimplemented Consents					
WY9	Former LCC Depot, Green Lane West, Garstang	0.50	<p>Vacant depot facility comprising a series of small, single storey storage, workshop and prefabricated office buildings, along with areas of hardstanding on a rectangular site within an established local industrial estate, just off the A6 Preston-Lancaster Road.</p> <p>Ownership registered as Lancashire County Council, although the County Council indicate that it sold the property in 2017.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> Existing buildings to be cleared Potential contamination from the previous use 	<p>Despite some delays in progressing the consents, the site is still likely to provide smaller industrial units supporting local engineering and manufacturing firms. 2,053 sqm of floorspace is proposed.</p>	0.50

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<ul style="list-style-type: none"> Housing to the north and north east. <p>Site has full consent for redevelopment of the existing depot to develop eight B2 industrial units of 106-167 sqm each or 1,474 sqm in total (843 sqm net of buildings to be cleared) (App. No. 17/00177/FULMAJ). The proposal was submitted by a neighbouring occupier, Garstang Truck Bodies, as a speculative development, consented in 2018.</p> <p>Over 2020-2021 a discharge of conditions consent was submitted, which resulted in a split decision with the Construction Management Plan viewed as insufficient as of May 2022 (App. No. 17/00177/DIS). No further applications submitted since then.</p> <p>One new unit is proposed to house Garstang Truck Bodies' expansion, with the other seven being self-contained industrial units available for Garstang's expanding businesses.</p> <p>Overall, the scheme is speculative in nature but is being slowly progressed by the applicant through the planning process.</p> <p>Separately, the north of the site has consent for two units, one of 426 sqm and one of 153 sqm. The larger unit is proposed for the expansion of the applicant's business, Pugh's Piglets, the smaller one to be rented out by the applicant (App. No. 17/00210/FUL). This scheme would have a shared access with the above scheme and the two proposals have been designed to work together.</p> <p>Three discharge of conditions applications submitted over 2021-2022 related to this, one approved, one rejected and one subject to a split decision.</p>		
WY10	Land At Copse Road, Fleetwood	2.11	<p>Vacant brownfield site cleared but with some foundations remaining, in an established industrial area off the A585 Amounderness Way within the Fleetwood settlement area.</p> <p>Two private individuals and Fleetwood FRP own.</p>	Likely to provide smaller industrial units supporting local engineering and manufacturing firms although some trade counter uses may also be sought here.	2.11

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Foundations of previous uses on site. <p>The site has full planning consent for six commercial units comprising one unit of 2,323 sqm for a B2 use, three units consisting of 930 sqm of floorspace and two units consisting of 697 sqm floorspace all proposed with flexible of E(g), B2 and B8 uses. The six properties could provide up to 13 terraced units (App. No. 20/00128/FULMAJ).</p> <p>The scheme is presently being marketed, off plan, with the units to let. Marketed as suitable for warehouse, workshop, trade counter, showroom and office use, subject to relevant planning consents.</p>		
WY11	VMS Solutions, Butts Close, Thornton Cleveleys	0.06	<p>Area of cleared land, between two industrial units and in the curtilage of VMS Solutions, in an established industrial estate.</p> <p>GBR Holdco own</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Foundations of previous uses on site. <p>The site has full consent for a B8 industrial Building of 582 sqm for the storage of goods (vitamin tablets) ancillary to tenant VMS Solutions (App. No. 21/01411/FUL). The property is intended for the use of an existing business but has an independent access onto Butts Close so could be offered to other parties.</p>	Proposed for a storage use of 582 sqm for a production business.	0.06
<i>Sub-Total</i>		2.67			2.67
Other Land with Unimplemented Consents					
WY12	Land East of Brockholes Industrial Estate, Brockholes Way, Cloughton-On-Brock.	2.25	Greenfield agricultural land, presently in agricultural use, adjacent to, and accessed from, an established industrial estate. The site forms part of the Local Plan development opportunity site SA7	Development likely to meet local needs for industrial and warehouse space from local manufacturing, engineering and logistics	2.25

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			<p><i>Constraints:</i></p> <ul style="list-style-type: none"> Trees on site <p>Full planning consent for an extension to the existing Brockholes Industrial Estate comprising 6,039 sqm of new industrial and warehouse floorspace, comprising 15 units of 77-777 sqm. Consented with a Section 106 agreement in October 2022 (App. No. 20/00497/LMAJ).</p> <p>In November 2022 a transfer on the Ownership Title was secured by developer Rayner Rowen Developments, the applicant on the above scheme. The land is thus now under developer control but no further progress towards delivery at this time.</p>	companies. 6,039 sqm of new industrial and warehouse floorspace proposed.	
WY13	Victoria Bingo, Poulton Road, Fleetwood	0.14	<p>Vacant, historic, three storey former bingo hall (originally a cinema built in the 1920s) in a mixed residential and retail area of Fleetwood on the A587 Poulton Road. Wyre Marine Services own.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> Historic building to be refurbished. <p>The property has full planning consent for a change of use from bingo hall at ground floor to part B8 storage, access to first floor, and change of use at first floor to a gym (App. No. 21/01273/FULMAJ). Ground floor plans are for some 16 storage units for domestic/business storage. Current plans are one of several proposals put forward by owner Wyre Marine Services, since it purchased the building in 2016, including proposals for retail and apartments. An application for 12 apartments and two retail units was consented but never implemented (App. No. 16/00478/FUL).</p> <p>No identified timetable for delivery at this time.</p>	Even if the present consent is delivered, the proposal is for small scale storage only rather than meeting business needs for accommodation.	-
<i>Sub-Total</i>		2.39			2.25
Safeguarded Sites					

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
WY14	Port of Fleetwood, Fleetwood	7.60	<p>Vacant former Roll-On, Roll-Off Ferry facility, mostly comprising surfaced car parking land, plus vacant dock facilities in the north, located on the edge of central Fleetwood and fronting the Wyre Estuary. Associated British Ports (ABP) own.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Site in Flood Zone 3, flood defences needed • Likely contamination from previous uses • Remains of various dock structures on the site • The site is located near to the River Wyre estuary which is a European designated site: Morecambe Bay and Duddon Estuary Special Protection Area (SPA), Morecambe Bay Special Area of Conservation (SAC) and Morecambe Bay Ramsar site. The estuary is also a Site of Special Scientific Interest. <p>Site will not be developable until it receives Environment Agency investment into flood defences (new sea wall). Flood defences will reduce the net developable area to 5-5.6 ha.</p> <p>The site is very unlikely to be used for port related uses, Fleetwood would need some £20 million (ABP estimate) in investment in dredging, etc. to become a viable port again and suffers significant competition from Heysham Port. Uses linked to the local fishing industry are also unlikely as Fleetwood's fishing fleet is now limited to only a few boats.</p> <p>ABP report that general industrial and warehouse uses may be possible here, reflecting the reasonable demand for such uses reported across the Fylde Coast. However, the costs of mitigating flood risk constraints here and opening up the site for development are expected to render almost any development scheme here unviable without public sector support. ABP and public parties have tried to access several public funds without success. These included Phase One Levelling Up funds where the site proposed for housing led development would be providing a new sea wall.</p>	<p>ABP argue that port related uses are unlikely here as Fleetwood is no longer a viable commercial port, without very significant investment, and reflecting competition from Heysham Port.</p> <p>While ABP would support the development of the site for other uses, including industrial and warehousing, the site is not judged viable for development without public sector funding to address viability issues. Attempts to secure such funding have not been successful to date and ABP are not pursuing any alternative funding options at the time of writing. Unless a clear 'way forward' can be identified to secure development funds, it is not recommended that this site be allocated in the next Local Plan for employment, or other uses.</p>	-

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
			Unless a source of development funding can be accessed, ABP argue that this site is unlikely to come forward for development, for almost any use.		
WY15	Brockholes Industrial Estate Extension, Catterall	30.26 (excluding planning permission 20/00497/LMAJ in site WY12: Land East of Brockholes Industrial Estate, Brockholes Way, Claughton-On-Brock for 2.25ha)	<p>Large area of irregularly shaped greenfield land, to the rear of an established local industrial estate off the A6 Preston-Lancaster Road, bounded by the Lancaster Canal in the east and south east.</p> <p>Stubbins House Farm and Town Croft Farm are the primary owners. Land in the north west, associated with the above planning application (App. No. 20/00497/LMAJ) owned by Leach Holdings.</p> <p><i>Constraints:</i></p> <ul style="list-style-type: none"> • Various underground pipelines cross the site including a high pressure gas pipeline running north-south and water pipelines running east-west • Electricity pylons cross the site • Trees onsite • Farms adjacent • Lancaster Canal is a designated Biological Heritage Site • A small area of the site to the north is within Flood Zones 2 and 3 • Access is constrained in all directions. <p>2.25 ha of land in the north west of the site – Land East Of Brockholes Industrial Estate, Brockholes Way, Claughton-On-Brock – has full planning consent for an extension to the existing Brockholes Industrial Estate comprising 6,039 sqm of new industrial and warehouse floorspace, comprising 15 units of 77-777 sqm. This is considered separately.</p> <p>Leach Industries expanded east from Brockholes Industrial Estate into the Safeguarded Area in 2018/2019.</p> <p>No plans for a more comprehensive development of the site have been identified.</p>	<p>Piecemeal expansion of Brockholes Industrial Estate, eastwards is occurring, under private sector initiative, to meet local business needs and to allow the growth of large existing occupiers on the Estate.</p> <p>A more comprehensive development of this large, heavily constrained site would require the leadership of a developer, experienced with such complex sites, who would likely seek a mixed-use scheme, including higher value uses, to ensure viability. Public sector financial support may also be needed. At the time of writing, no such developer interest is identified nor is there any alternative plan, by the public sector to drive forward a larger scheme here.</p> <p>In the absence of such a delivery plan it is not recommended the site be allocated for employment uses in its entirety. Small scale growth of Brockholes Industrial Estate to meet local business needs, onto deliverable plots, should be supported however.</p>	-

Site No. (Study Ref.)	Site Name	Baseline Employment Land Supply, ha	Comments	Likely Site Use	Realistic Employment Land Supply, ha
<i>Sub-Total</i>		37.86			-
Total		35.82 (plus 37.86 Safeguarded)			35.08

Source: BE Group, WBC, Other Stakeholders, 2023

- 7.37 Collison have confirmed its ongoing interest in Site WY3 Riverside Industrial Park Extension, Catterall to support its own expansion, possibly with land and premises offered to other businesses, although this remains dependant on its acquisition of the land.
- 7.38 In terms of the two Safeguarded Sites, WY14 Port of Fleetwood, Fleetwood (7.60 ha) is unlikely to be developed for port related uses. General industrial and warehousing uses may be possible here but would not be deliverable without significant public funding to address the site constraints. Attempts to secure such funding have not been successful to date. Unless a clear 'way forward' can be identified to secure development funds, it is not recommended that this site be allocated in the next Local Plan for employment, or other uses.
- 7.39 At Safeguarded site WY15 Brockholes Industrial Estate Extension, Catterall (30.26 ha) piecemeal development is occurring on the edge of Brockholes Industrial Estate to meet local needs and allow growth. There is no market or developer interest in a more comprehensive development here, particularly given the site's constraints and uncertainties about how a large scheme could be accessed. SA7, in its entirety, does not appear to be a deliverable site and it is not recommended the site be allocated for employment uses. Small scale growth of Brockholes Industrial Estate to meet local business needs, onto deliverable plots, should be supported, however.
- 7.40 Site WY4 South of Goose Lane, Catterall (1.00 ha) recently secured consent for a mixed light industrial/warehouse scheme of smaller units. However, the site owners are seeking a revised scheme which, if consented, would include hot food uses which would therefore reduce the net area of land and premises in E(g)/B-Class employment use.
- 7.41 Additionally, three sites – WY7 Land West of Great Eccleston (1.00 ha), WY8 Forton Extension, Forton (1.00 ha) and WY5 Land West of the A6, Garstang (4.68 ha) – are now consented for mostly residential schemes with ancillary sites set aside for E(g)/B-Class uses. These sites have not attracted viable market interest to date, although this may reflect the fact that infrastructure and site access has yet to be provided to any plot. Discussions with the housebuilders, and their agents, suggest that the respective housing schemes will open up and provide infrastructure for the employment land. It is likely that once the sites are opened up, market interest will improve, particularly at key locations off the A6. However, there remains a risk that the local business interest these sites will not generate sufficient value to allow a viable development and/or that the

applicants will seek alternative, higher value, uses here, reflecting what has occurred across the wider locations.

- 7.42 All these plots would need to be subject to viability testing before they were included in the new Local Plan. However, if it was assumed that all three of these sites, plus WY4 South of Goose Lane, Catterall will ultimately be lost to non E(g)/B-Class uses then as **a worst case scenario the realistic land supply reduces to 27.40 ha in seven sites. If the 10.96 ha at WY2 Hillhouse Technology Enterprise Zone, Thornton were excluded from the supply, given the many uncertainties at that location, the supply reduces further to 16.44 ha.** However, we would argue that it is realistic to allow for some available supply at Hillhouse, given the commitment of stakeholders to delivery here and the market interest from at least local businesses, even if what is ultimately brought forward bears little resemblance to what was initially proposed in masterplanning.
- 7.43 The vast majority of land in Wyre is proposed for industrial and warehouse uses only, mostly aimed at meeting local needs for units of sub 500 sqm each, which does reflect market demand. Only at WY2 Hillhouse Technology Enterprise Zone, Thornton are multiple plots provided which could support larger business requirements.
- 7.44 Hillhouse is also the only location where offices are proposed, primarily on New Plot E (2.56 ha) where a speculative office development of up to 29,922 sqm is suggested. Also Plot G (1.02 ha) where 4,090 sqm of offices is proposed. Given the uncertainties in the local office market, outside of public sector change, demand for this scale of offices here will need to be tested further. Also, given issues of viability in larger office schemes, even in town and city centres, large scale delivery here is unlikely without public sector support or cross funding from other large projects in the area. The delivery of offices thus remains aspirational at this time, although the land remains available to meet other needs if the office space is not brought forward.

Geographic Distribution of the Wyre Realistic Employment Land Supply

- 7.45 Table 61 shows the geographic split of the realistic employment land supply in Wyre Borough.

Table 61 – Wyre Borough Location Assessment – Realistic Supply

Location	Realistic Supply	
	Total, ha	Percentage
A6 Corridor – Garstang/Catterall	11.85	33.8
Thornton/Cleveleys	11.02	31.4
Fleetwood	10.21	29.1
Rural – Great Eccleston/Forton	2.00	5.7
Total	35.08	100.0

Source: BE Group, 2023

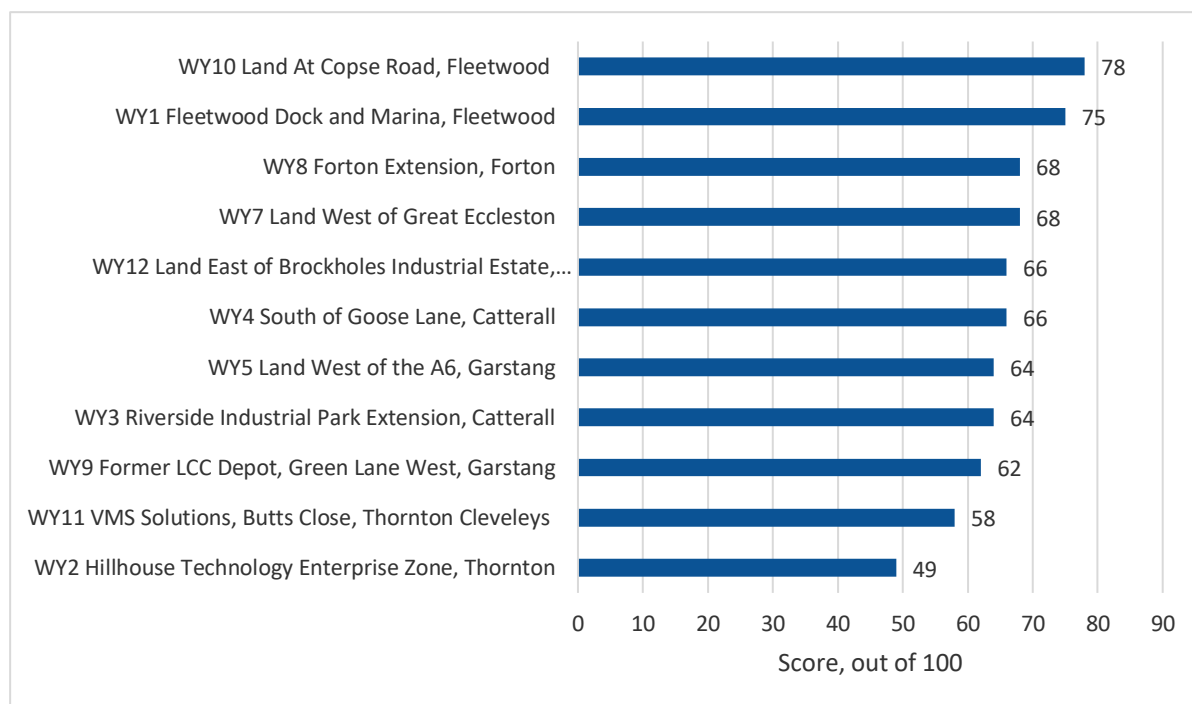
- 7.46 As Table 61 shows, there is a relatively even division in the supply between the A6 Corridor, Thornton/Cleveleys and Fleetwood at this time. However, if, as seems most likely, the remaining employment land at WY1 Fleetwood Dock and Marina, Fleetwood is taken up for the exclusive use of Fisherman’s Friend then supply in the Wyre Peninsular will be focused in WY2 Hillhouse Technology Enterprise Zone, Thornton which is increasingly meeting both local and strategic needs. The supply in rural Wyre is modest although locations such as Great Eccleston and Forton benefit from relatively strong links to other parts of Wyre.

Site Scoring – Realistic Supply

- 7.47 As for Blackpool and Fylde, each site has been scored against ten criteria relating to Site Location and Access, Development Prospects, Site Conditions and Availability. The maximum score possible is 100. The Scoring Criteria can be found in Appendix 6 and individual site scores can be found in Appendix 7. Figure 51 shows the scoring for the 11 sites identified as comprising Wyre Borough’s maximum realistic long-term supply. The assessment gives an appraisal of the overall quality of the land resource and provides one measure of what sites could be considered priorities for Local Plan allocation and what sites are of secondary value.
- 7.48 The highest scoring sites are found at Fleetwood, benefiting from direct access to the A585 Amounderness Way and reasonable public transport, including the tram. The sites also benefit from strong plans for delivery, even if that means the land is likely to be taken up early in the next Local Plan period.
- 7.49 The lowest scoring site is WY2 Hillhouse Technology Enterprise Zone, Thornton. This reflects the site’s relative distance from the strategic road and rail network and the range

of site constraints. There are clearly a diverse range of proposals being progressed at Hillhouse, but they have more issues to overcome here than they might have to in other locations in the Fylde Coast.

Figure 51 – Wyre Borough Sites Scoring – Realistic Supply



Source: BE Group, 2023

EMPLOYMENT AREA ASSESSMENTS

7.50 BE Group have reviewed a total of 86 Employment Areas (industrial estates, business parks, rural and urban businesses centres, farm conversions to E(g)/B-Class uses and facilities for larger individual businesses) across the Fylde Coast. Each has been appraised and assessed through a combination of site visits, local intelligence and the views of those involved in the property market in those areas.

7.51 Proformas have been completed for each area and are accompanied by site plans. These are included at Appendices 3a to 5b. The proformas adopt the following format, to simplify the data and make it easier to interpret:

- A location map, including the area boundary is provided
- ‘Area Name, Area Address/Settlement’ the local authority’s designated title for the area, including where necessary the main street and town
- The size of the area, in hectares, is provided based on GIS plans provided by the local authorities

- A brief ‘Description’ is provided in the form of BE Group’s comment on the area
- Details on ‘Prominence’ and other locational factors such as distance to key routes, public transport, local population and services are provided to show how the area links to the wider Fylde Coast economy
- Included in the sub section ‘Premises and Area Condition’ are consideration of the main ‘Occupiers’ of the area. Using a mixture of Valuation Office Agency (VOA) and LandInsight data, and site surveys, property data is also provided on the following:
 - The total number of units in the area
 - The total floorspace of all premises in the area, in sqm
 - A split of the number of premises, by Use Class, i.e., split by E(g)(i), E(g)(ii), E(g)(iii), B2, B8 or ‘other’ use classes
 - The ‘Predominant Uses’ in the area, by the 2007 Standard Industrial Classification (SIC)
 - An overall assessment of the ‘Prevailing Uses’ of the area – for example, the area could comprise an office park, modern distribution, mixed use with retail or other, key local services centre or a town centre office area
 - An indication is provided of the age of properties in each of four categories assessed in ‘Buildings Age’. These are pre-1945; 1945-1990; 1990-2010; 2010+(new)
 - ‘Buildings Quality’ is also broken down into four category assessments. ‘Derelict’ is as expected. ‘Poor’ represents low quality design, externals, and condition. ‘Good’ equates to modern design, building condition, parking and external area provision. The remaining category is ‘Average’, covering properties that do not fit any of the other three headings
 - In ‘Tenure’ the number of owner occupied or leasehold properties, in the area, is identified. This gives some evidence of how committed businesses are likely to be to long term occupancy in the area, i.e. owner occupiers have a stronger commitment to retaining their property over the long term than leaseholders
 - In ‘Vacancy’ the number, floorspace, condition of properties and quoting rents (where given) of vacant and marketed premises is identified. These properties have been identified from a combination of the site surveys and interrogation of the data collated for the vacant property schedules set out in Section 4.0. It gives a view of vacancy rates in each area although it will not always be possible to identify premises which are vacant, but not being openly marketed, through visual inspection

- The average rateable value of premises in the area, in a £ per sqm basis is provided, derived from VOA data. This gives a high level view of the value of property in the area.
- ‘Access factors’ reviews access issues in the area, which will be a key factor that businesses will consider when making relocation decisions. This includes the availability of parking and loading facilities generally and specifically for larger sites
- ‘Other Property Details’ considers other factors in the property offer, such as the number of floors in buildings, while ‘Other Constraints’ considers any other issues which may affect the ability of the area to operate and attract new businesses, such as flood risk.
- In terms of ‘Area Conclusions’, in ‘Opportunities for redevelopment/ expansion’, vacant land is identified, as is the scope for redevelopment of particular vacant/derelict properties or sites. Greenfield expansion possibilities are also included, showing opportunities for the growth and intensification of the E(g)/B-Class uses here
- Finally, ‘Grade’ refers to BE Group’s professional opinion on the ranking that should be afforded to the individual area. This has been based on a consideration of the above data and BE Group’s professional opinion on each area, reflecting site visits and relevant stakeholder comments. Combining this data leads to an overall hierarchical assessment banded A to E. These are described in Table 62.

Table 62 – Grades A to E Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly in the Local Plan Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, E(g), B2 and B8, including some new inward investors.	Protect strongly in the Local Plan Support and expand
C	Key employment sites with an influence over the whole local authority area, but primarily geared towards local businesses and E(g)(iii) light industrial, B2 and B8 uses.	Protect in the Local Plan Support
D	Lower quality locations in residential or rural areas suffering from poor accessibility and massing.	Continue to protect/review through the Local Plan
E	Very poor quality areas. Widespread vacancy and dereliction in poor environments. Or areas which have been, or are in the process of being, lost to other uses.	Promote alternative uses if possible

Source: BE Group 2023

7.52 The template for the areas' proforma is included at Table 63. Also, at Appendices 3a to 5b, background data on the address, size (sqm), use class and average rateable value (£/sqm) of each property, derived from VOA data, is provided as an ancillary spreadsheet to each proforma labelled 'Property Details'.

Table 63 – Proforma Template

SITE MAP													
Area Name, Area Address/Settlement													
Area Size, Ha													
Employment Area Description													
Prominence and Location													
Location													
Distance to M55 Motorway, km													
Distance to A-road, km													
Distance to Rail Station, km													
Distance to Existing Bus Route, km													
Distance to Services, km													
Overall Prominence (High, Medium, Low)													
Premises and Area Condition													
Main Occupiers													
Total Number of Units													
Total Floorspace, Sqm													
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33.33%;"></td> <td style="width: 16.67%; text-align: center;">E(g)(i)</td> <td style="width: 16.67%; text-align: center;">E(g)(ii)</td> <td style="width: 16.67%; text-align: center;">E(g)(iii)</td> <td style="width: 8.33%; text-align: center;">B2</td> <td style="width: 8.33%; text-align: center;">B8</td> <td style="width: 8.33%; text-align: center;">Other</td> </tr> </table>								E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	Other
	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	Other							
Properties by Use Class, No. of Units													
Predominant SIC Codes (2007)													
Prevailing Uses													
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;"></td> <td style="width: 25%; text-align: center;">Pre 1945</td> <td style="width: 12.5%; text-align: center;">1945-90</td> <td style="width: 12.5%; text-align: center;">90-2010</td> <td style="width: 25%; text-align: center;">New 2010+</td> </tr> </table>								Pre 1945	1945-90	90-2010	New 2010+		
	Pre 1945	1945-90	90-2010	New 2010+									
Buildings Age													
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;"></td> <td style="width: 25%; text-align: center;">Derelict</td> <td style="width: 12.5%; text-align: center;">Poor</td> <td style="width: 12.5%; text-align: center;">Average</td> <td style="width: 25%; text-align: center;">Good</td> </tr> </table>								Derelict	Poor	Average	Good		
	Derelict	Poor	Average	Good									
Buildings Quality													
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"></td> <td style="width: 50%; text-align: center;">No. Owner Occupied Units</td> <td style="width: 50%; text-align: center;">No. Leasehold Units</td> </tr> </table>								No. Owner Occupied Units	No. Leasehold Units				
	No. Owner Occupied Units	No. Leasehold Units											
Tenure													
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33.33%;"></td> <td style="width: 16.67%; text-align: center;">E(g)(i)</td> <td style="width: 16.67%; text-align: center;">E(g)(ii)</td> <td style="width: 16.67%; text-align: center;">E(g)(iii)</td> <td style="width: 8.33%; text-align: center;">B2</td> <td style="width: 8.33%; text-align: center;">B8</td> <td style="width: 8.33%; text-align: center;">Other</td> </tr> </table>								E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	Other
	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	Other							
Vacancy													
No. of Vacant Units													
Floorspace of Vacant Units													
Condition of Vacant Properties													
Average Rents Sought/Achieved, £ per Sqm													
Average Ratable Values, £ per Sqm													
Access Factors													
Other Property Details													
Other Constraints													
Area Conclusions													
Opportunities for redevelopment/ expansion													
Site Grading A-E													

Source: BE Group, 2023

Blackpool – Employment Area Assessments

7.53 Table 64 provides the assessment of 13 Employment Areas in Blackpool. These comprise the ten Employment Areas identified in Policy DM7: ‘Provision of Employment Land and Existing Employment Sites’ of the Blackpool Local Plan Part 2: Site Allocations and Development Management Policies (2023). Reflecting monitoring documents such

as 'Employment Land Update 2021 and Blackpool Airport Enterprise Zone Topic Paper' (2022)' and general geography, we separated out three other industrial estates, previously included in larger Employment Areas, under Policy DM7:

- Kinncraig Business Park / Moorfields Estate – Included in Moor Park under DM7
- Fox Industrial Estate – Included in Mowbray Drive under DM7
- Blackpool and Fylde Industrial Estate – 1.49 ha share of a larger estate, the majority of which falls into Fylde Borough – Included in Clifton Drive under DM7.

7.54 Together these 13 Employment Areas comprise 180.86 ha of primarily developed employment land. Just under a third of this, 56.23 ha, falls within Blackpool Airport Enterprise Zone – which includes Blackpool Business Park / Squires Gate Estate / Sycamore Trading Estate within the EZ boundary. Another quarter of the space, 46.25 ha, is within Clifton Road Industrial Estate.

7.55 Analysis of VOA data identifies a supply of 785 properties in these 13 Employment Areas, comprising 553,309 sqm of floorspace. Again, Blackpool Airport Enterprise Zone - Blackpool Business Park / Squires Gate Estate / Sycamore Trading Estate has the largest supply – 234 units, comprising 161,873 sqm of floorspace or 29.8 percent of the total number of units and 29.3 percent of the total floorspace in the Borough. Clifton Road Industrial Estate has 141 units and 139,535 sqm of floorspace, 18.0 percent of the total number of units and a quarter of the total floorspace.

7.56 The area survey did not identify any premises showing external evidence of dereliction and all, but one area was over 90 percent occupied, while nine of the 13 areas were fully occupied, with no openly marketed premises. The exception is Warbeck Hill where 28,654 sqm of existing floorspace, in two main buildings, on 8.36 ha is now vacant. Stakeholder discussions indicate that Warbeck Hill will most likely be redeveloped for non E(g)/B-Class uses, removing this stock from the supply.

Table 64 – Blackpool - Assessment of Existing Employment Areas (Existing Premises)

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
Existing Designated Employment Area													
Blackpool Enterprise Zone - Blackpool Business Park / Squires Gate Estate / Sycamore Trading Estate	56.23	Business estate accommodating a range of uses located adjacent to Blackpool Airport and accessed off the A5230. The estate has two access points off the A5230 via Amy Johnson Way and Sycamore Avenue. Amy Johnson Way leads to the back of the estate and contains a range of good quality modern uses. The front of the estate, accessed via Sycamore Avenue is home to older, multi-let industrial units.	Location is very prominently located on the A5230 Squires Gate Lane with a direct route east to the M55, Junction 4. Area is on a bus route and 1.8 km east of a railway station.	234 (161,873)	Area incorporates a wide mix of uses including 87 offices (37 percent) mostly found at Evans Business Centre, Sycamore Trading Estate. Evans Business Centre is also a focus for the 22 light industrial units identified. The remaining units are B2 (36 or 15 percent) or B8 (89 or 38 percent) uses including the modern properties of Amy Johnson Way. Most offices and light industrial units are sub-100 sqm each. The B2/B8 units are mostly sub-1,000 sqm each.	The majority of the units 139 (59 percent) have been built since 1990, with a majority of premises in Blackpool Business Park built in the 2000s. The larger industrial and warehouse units fronting A5230 Squires Gate Lane being of the 1945-1990 age range.	Premises in Blackpool Business Park are of good quality, others are of average quality	No vacancies amongst the developed space	All units appear to be subject to some leasehold	Average rateable value: £71.42/sqm. Two access points from the A5230 with good internal navigation due to wide internal roads throughout the estate and sufficient parking on premises. Development limited by the need to safeguard the adjacent Airport	Eight infill plots in Blackpool Business Park. Eastern Gateway development site is located to the east (Parcel BB1 above). Another 1.15 ha (Parcel BB3: Parcel B) is identified south east of Blackpool Business Park. At Squires Gate Industrial Estate - Fox Brothers Transport and Recycling Yard (Parcel BB4), this site is in temporary use for commercial vehicle parking, with a 1 year consent for this which expires in May 2024. It thus represents a medium development opportunity, which could be linked to Parcel BB2 Eastern Gateway site to the south. Further growth opportunities in Blackpool Airport, to the west and south, fall into Fylde Borough.	Alongside North Blackpool Technology Park this is one of the prime employment locations of Blackpool, with the largest offer of modern premises and being in the stronger location on the strategic road network. Although the bulk of the occupiers are local to Blackpool and the Fylde Coast, the area also accommodates a range of larger regional/national employers, including high technology businesses such as Magellan Aerospace. Development of the infill plots at Blackpool Business Park (Parcel BB1) is expected to be primarily for light industrial space, aimed at local firms, or for the expansion of existing occupiers. The Eastern Gateway, Parcel BB2 above, is expected to meet some demand from inward investors though.	A
Vicarage Lane Estate	15.82	Busy industrial estate bordering residential uses to the north, west and south, with retail uses to the east. The stock is older and is mainly made up of B2 and B8 uses with a small presence of offices.	In a residential area, somewhat removed from the strategic road network, 1.4 km from the A583, 3.2 km from the M55. 1.9 km from the nearest railway station	69 (55,275)	Predominantly B2 and B8 industrial estate, with 24 (35 percent) B2 general industrial units and 37 (54 percent) B8 warehouse units. The B2/B8 units are mostly sub-1,000 sqm each.	Most units are from the 1945-90 age range	All of average quality	Fully occupied	54 leasehold units (78 percent), 15 owner occupied	Average rateable value: £41.86/sqm. Access road sufficiently wide, internal roads narrowed due to on-road parking	One very small, 0.02 ha, undeveloped site is found off Burton Road, south of the Dennis Eagle manufacturing plant. Undeveloped land to the west forms part of the secure Valeo Snack Foods facility and is assumed not to be available to meet the needs of other parties. Area bounded by housing and retail offering no opportunities for expansion.	Mid-sized, average quality industrial estate, meeting a diverse range of needs. The Area accommodates one major occupier, Velo Snackfoods but most other premises are occupied by local businesses. The residential nature of the location and the average quality of the premises mean that it is likely to be mostly of interest to local businesses only.	C

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition						Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure				Other Issues
Clifton Road Industrial Estate	46.25	Large industrial estate with a very strong location being situated at an intersection of the A583, A5230 and the M55 Motorway. The employment area is divided into three sections with a large sprawling industrial section to the west, a large new Lancashire Constabulary Headquarters located in the middle and a Glasdon premises in the east.	Very strong location at the intersection of the A583, A5230 and the M55. On bus routes and 4.5 km from a rail station	141 (139,535)	Mixed offer with 23 office premises, 70 light/general industrial units (49.6 percent) and 48 warehouses. All the offices are sub-200 sqm in size. The light/general industrial units are mostly sub-400 sqm in size. The B8 units are mostly sub-1,000 sqm in size.	110 units (78.0 percent) of 1945-1990 age range, 28 in the 1990-2010 range and three new build units including the Police HQ	138 units (97,9 percent) of average quality. Three of good quality	Fully occupied	88 units (62.4 percent) leasehold, including all the offices. 53 freehold, mostly the larger B2/B8 facilities.	Average rateable value: £48.57/sqm Very strongly located in relation to important A-roads and the M55 motorway. The western section sees on-road parking narrow the internal roads of the estate.	Two areas of vacant and underused land in the area: 1. Plot in South West of Industrial Estate, to rear of DePuy Synthes (2.50 ha) (Parcel BB5 above) - Area of cleared backland, partly in use for open storage and HGV parking. Falls into the curtilage of the adjacent, recently completed Affordable Aluminium unit and only accessible via that property. Isolated backland site, which could not be developed for anyone other than the existing site owner/occupier. Site is already partially in use by that business. The land thus does not appear available to meet the needs of other occupiers 2. Unused Land in the Cadent Facility, Gerry Richardson Way (3.83 ha) - Considerable land within this facility is unused or in use for open storage. However, the land is occupied by the remains of a range of former gas holding and processing facilities, with extensive ground contamination likely. Remediating this site will likely generate considerable additional development costs and low value uses, including E(g), B2, B8 uses are very unlikely to be financially viable here (Site not considered further). Other undeveloped plots in the Area fall into the secure curtilages of facilities such as Nutrition Group and the North West Division Police Headquarters and are assumed not to be available for development by other parties. Undeveloped land to the north and west comprises	The second largest and arguably best located employment area of Blackpool. The location accommodates some major employers, but the bulk of the premises is occupied by smaller, local businesses. The office premises mostly comprises 14 suites in Brinwell Road Business Centre, Brinwell Road, of sub 100 sqm each. The most significant offer is smaller industrial and warehouse units of sub-400 sqm each.	C

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
											Mereside Park and playing fields for St Georges School. It is assumed these are not available for development. They are designated as green infrastructure protected by Policy CS6 of the Local Plan Part 2.		
Blackpool and Fylde Industrial Estate	1.49	Small section of Blackpool and Fylde Industrial Estate lying within the Blackpool authority boundary. The land contains a Booker Wholesale facility	Wider industrial estate has direct access to the A5230 and then the M55, Junction 4. Bus route nearby, 4.3 km from a railway station.	1 (10,629)	1 B8 trade use	1945-1990 age range building	Average quality unit	Fully occupied	All freehold	Average rateable value: £41.64/ sqm. Access in Fylde Borough	All development opportunities fall into Fylde Borough.	See analysis for wider area in Fylde Borough	C (Grading for wider Area)
Preston New Road (NS&I)	2.99	Self-contained office building located at the back of a recently built residential estate.	Area well located overall, off the A583 and 1.6 km north of the M55, Junction 4. However, locally the area falls at the back of a residential area, accessed by residential roads.	2 (4,476)	Offices	1945-1990 age range	Average quality	In full use	Partly leasehold, partly owner occupied.	Average rateable value: £84.0/sqm. Access through residential estate.	Secure financial facility. It is assumed no land within the secure area is available for development by third parties. Area bounded by other uses including, housing and a caravan site offering no opportunities for expansion. It is understood that, in the long term at least, the occupiers may wish to vacate the property. If the building becomes empty it is unlikely that this isolated office will be reoccupied by another large business. Under that scenario the whole site could represent a redevelopment opportunity.	Large, reasonable quality office building in national public sector use. The property remains in use at the time of writing, but it is understood that the occupiers may wish to vacate the property. Should the property be vacated by the public sector, it is very unlikely that a private sector business, or businesses, could be found who would occupy even a portion of this large backland office building. In particular the residential location of the site will be less attractive to businesses than competing alternatives in Central Blackpool or in the Whitehills/Blackpool Airport Enterprise Zone Area to the south, which links to the M55. Redevelopment of this site for E(g)/B-Class uses could have viability constraints. A residential redevelopment scheme would thus be most likely here given surrounding	D/E

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
												uses. The Local Plan allocation here should reflect this likelihood.	
Chiswick Grove Estate	4.47	Business estate off the A583 with newer retail uses sitting on the frontage of the park and other employment uses towards the back. The rear employment consists mainly of offices while there is a small presence of industrial uses with Simpsons Beverage Company being the main industrial occupier.	Well located off A583, serving south east Blackpool and only 1.7 km north west of the M55, Junction 4.	30 (9,804)	23 (77 percent) offices. 4 light industrial/general industrial, 3 warehouses. All but 6 units are sub-200 sqm in size.	All 1945-1990 age range	All average quality	2 vacant offices (93 percent occupancy rate), 1,664 sqm of vacant floorspace in total. Quoting rent is £10.76/sqft (£81.59/sqm)	27 units leasehold, including all the offices. 3 freehold	Average rateable value: £63.84/sqm Good access off the A583 however internal roads are narrowed due to on-road parking	All land in use. Area bounded by other uses including a cemetery, housing and a school offering no opportunities for expansion.	Well located local scale employment area, on a main A Road and well placed to serve south Blackpool while linking well to the M55 Corridor. A key feature is its offer of average quality, smaller offices, mostly sub-200 sqm each in size, in two schemes, offered at relatively affordable rents of £10.76/sqft (£81.59/sqm).	C
Moor Park	14.46	Industrial estate in the north of Blackpool, close to the A587, comprised mainly of small to mid-sized industrial units. The north west of the employment area is home to a new development under construction, the Wheeler Hub which will comprise small workshop units.	Industrial estate has local prominence on Moor Park Avenue with close proximity to the A587 Bispham Road, which runs through Blackpool. 2 km from railway station and close to bus route.	64 (44,550)	Comprises 38 (59 percent) light industrial/general industrial units and 19 B8 warehouses. Also includes 7 mid-sized office suites/ buildings of 140-450 sqm each. The light industrial units, the Wheeler Hub, are 60-70 sqm each. Other B2/B8 units are of mixed sizes, ranging from 79 sqm up to 3,600 sqm each.	35 properties (56 percent) in 1945-1990 age range. 24 units (38 percent) under construction as the Wheeler Hub.	Existing units are of average quality, the 24 new build units of the Wheeler Hub can be classified as good quality.	3 Wheeler hub units remain on the market at time of writing, workshops of 60 sqm each available for freehold sale at a quoting price of £118/sqft (1,283/sqm). Overall scheme 95 percent occupied.	28 units (44 percent) are freehold, including the Wheeler Hub units. 36 units are leasehold.	Average rateable value: £54.20/ sqm. Wide roads with double yellow lines limiting on-road parking. Most sites have parking on the premises. Some land in NE is in Flood Zone 3 and includes trees with Tree Preservation Orders.	Site is in full use including a large electricity transformer facility. Previously vacant land on Bristol Avenue is now developed for the Wheeler Hub workshops. Land to the north of this is in use as a Household Waste Facility. Undeveloped land to the west and east is in outdoor leisure use, including Moor Park. These areas are designated as green infrastructure protected by Policy CS6 of the Local Plan Part 1.	Reasonable quality local industrial estate serving the northern area of Blackpool. Includes space for mid-sized industrial and warehouse businesses, but key has been the recent development of the Wheeler Hub, primarily for 60-70 sqm light industrial workshops. Units of this size are in strong demand across the Fylde Coast, demonstrated here by the fact that 21 out of 24 units were sold, or at least reserved, off plan. With this scheme now nearing capacity businesses will be looking for other similar opportunities elsewhere.	C
Fox Industrial Estate	1.26	Older industrial estate consisting of two rows of multi-let units	Small estate in a residential area, distant from the M55 but off the A587 Bispham Road cross town route. Close to a bus route and rail station.	18 (4,562)	Area mostly comprises 13 (72 percent) B2 general industrial uses of 100-600 sqm each plus 3 offices and 3 B8 warehouses	1945-1990 age range	Average quality	Fully occupied	All units are leasehold	Average rateable value: £40.40/sqm. On-street parking narrows access road to the estate while parked cars make internal navigation difficult.	Area is in full use. Land to the north east is in outdoor leisure use and assumed not available for development. This area is designated as green infrastructure protected by Policy CS6 on the Local Plan Part 1 and as a 'Site with Biodiversity Value' under Policy DM35 of the Local Plan Part 2.	Small, average quality industrial estate serving the centre and east Blackpool. Area is fully occupied, and increasingly dominated by motor vehicle repair and parts businesses and appears to be serving a purpose meeting needs from this sector.	C

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
											Northern corner is in Flood Zone 3.			
Devonshire Road / Mansfield Road	3.44	Sitting on the B5124, this large self-contained industrial premises is occupied by biscuit manufacturer, Burton's Biscuits	Located in a mostly residential area, separate from the strategic road network and 4.4 km from the nearest rail station	1 (18,230)	B2 manufacturing facility	1945-1990 age range	Average quality	Fully occupied	Freehold facility		Average rateable value: £15.64/sqm In a mostly residential area but retains reasonable access, parking and space for heavy vehicles to turn	All land in use. Area bounded by other uses including a cemetery, housing and a railway line offering no opportunities for expansion.	Solus facility for a key Fylde Coast employer. The facility's position in a residential area does not appear to be inhibiting operations.	B
Mowbray Drive	15.44	Busy mixed use estate located off the A587, stretching along both sides of Mowbray Drive. Trade uses dominate while there are some small, serviced office providers such as Thrive present.	Mid-sized estate in a residential area, distant from the M55 but off the A587 Bispham Road cross town route. Close to a bus route and rail station.	109 (50,279)	Mixed use area, including 46 (42 percent) smaller office suites, mostly sub 70 sqm in size at the multi-let office building 22 Plymouth Road (Thrive serviced office scheme). Also 25 B2 general industrial units (23 percent) and 38 (35 percent) B8 warehouses. Most industrial and warehouse uses are sub-500 sqm in size each.	1945-1990 age range	Average quality	3 offices on the market, totalling 88 sqm. 4 B2 units on the market, totalling 1,706 sqm. Scheme is 94 percent occupied.	2 freehold units, the rest leasehold		Average rateable value: £49.1/sqm. Accessed off the A587 the estate is well located but the shortage of on-site parking causes congestion within the estate's internal roads.	One small undeveloped site in the north east – Infill Plot off Chorley Road, South East of Westfield Caravans (Parcel BB6 above). Small grassed infill site, with road frontage, in the rear of an established industrial estate, bounded by a caravan sales facility and warehouses, HGV parking. Small, unconstrained plot which remains available to meet needs. Site is Council owned, albeit on a long lease to Trevors Warehouses allowing Blackpool Council to provide at least some support in marketing and developing the site. Reflecting market demand, this small plot could either meet the needs of a single business or support a small scheme of light industrial units. Other undeveloped land in the estate falls into the private, secure facilities of larger occupiers like Enveco and Westfield Caravans and assumed not available for development by other parties. Area bounded by other uses including college buildings, housing and a	Large industrial estate, capable of meeting a diverse range of mostly local needs. It accommodates some larger businesses, but primarily provides units of 500 sqm each to meet local businesses. It also supports one of the largest serviced office schemes in Blackpool, 46 smaller suites which appear well occupied.	C

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
											railway line offering no opportunities for expansion.		
Kincraig Business Park / Moorfields Estate	2.93	Industrial estate lying to the north of Blackpool close to the A587. The area is dominated by smaller industrial uses and is split into two sections with modern units in the northern section and older units in the southern section.	Industrial estate has local prominence on Faraday Way with close proximity to the A587 Bispham Road, which runs through Blackpool. 2 km from railway station and close to bus route.	63 (12,292)	33 (52 percent) of the units are in B8 use including some in trade use. 25 are in light industrial/general industrial use. Three offices on Kincraig Road. All but 8 units are sub-300 sqm in size.	36 units (57 percent) in the south are in the 1945-1990 age range. 27 units in the north are in the 1990-2010 age range.	Older units are of average quality, more modern units are of good quality	Fully occupied	All units are leasehold	Average rateable value: £62.55/sqm. Good access to both sections, parking constrained in the southern section of the area.	Area is in full use. Undeveloped land to the north is in outdoor leisure uses and assumed not available for development. This area is designated as green infrastructure protected by Policy CS6 of the Local Plan Part 1.	Area includes a sizeable offer, some 35 units of smaller light industrial and warehouse properties of less than 100 sqm each. Stakeholders report that such units are in strong demand at this time, but none are available at this time.	C
North Blackpool Technology Park	7.72	Business park lying to the north of Blackpool, close to the A587. The area is dominated by office uses but recent development has been for light industrial units.	Edge of settlement business park, serving north Blackpool and Thornton-Cleveleys. In the Blackpool context the location is distant from the main A-Roads, M55 and rail stations.	51 (13,150)	Large office park, with 46 offices (90 percent), some of which may incorporate laboratory uses All but 5 offices are sub-300 sqm in size each. 4 light industrial units completed to date and a B8 Royal Mail sorting centre.	All buildings developed since 2000 and most built after 2015	Good quality modern space	No vacancies amongst the developed space	All leasehold	Average rateable value: £87.0/sqm. The area is well laid out with wide roads and sufficient parking.	Identified 2.0 ha expansion site in the north (Parcel BB7 above). This is a linear area of greenfield land in the north of an established, high quality business and science park on the edge of the Blackpool settlement area. Land in the south west is now developed for light industrial uses. Development plans for this site are discussed separately. Area bounded by housing, with Green Belt land to the east, offering no opportunities for expansion.	Large modern office park. The location accommodates some regional high technology uses, including medical companies such as the MAC Clinical Research Centre. However, the majority of occupiers appear to be in traditional financial, legal and professional service uses. With 51 offices this is one of the largest sources of modern office space in the Fylde Coast, including some 26 smaller suites of 34-352 sqm at the Blackpool Technology Management Centre and 9 suites of 75-280 sqm at Darwin Court. It is a strong location for marketing for inward investors, although there appears to be no available offices at this time. It should be noted that future development here is expected to be for light industrial units however, aimed at meeting local	B

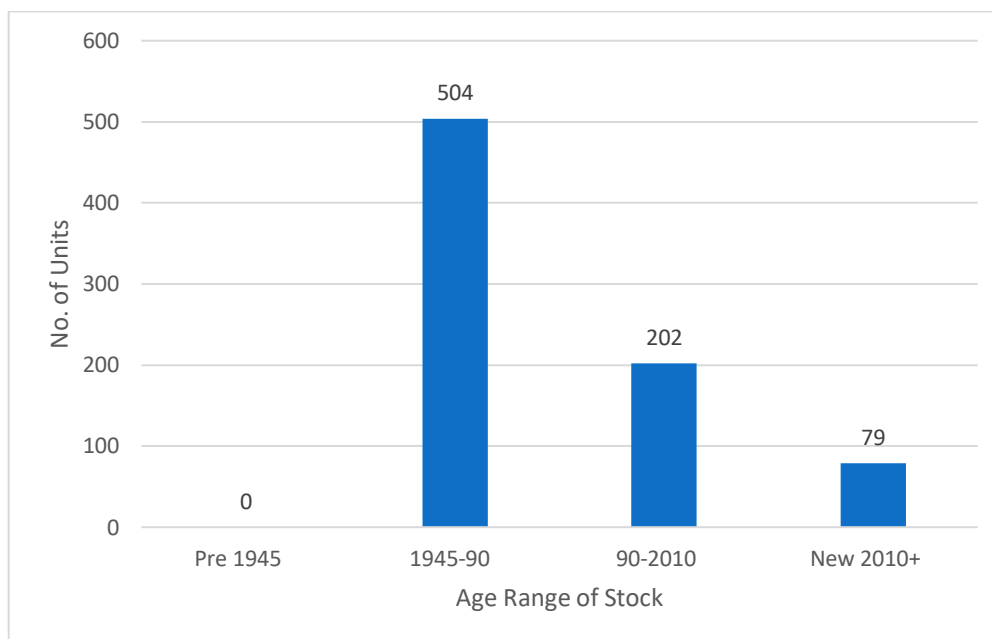
Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
												business needs and reflecting local demand.	
Warbreck Hill	8.36	Large self-contained, older office premises accessed off the B5265 in close proximity to the A587. Located in a mostly residential area, the premises are now vacant.	In a residential area, somewhat removed from the strategic road network, 0.5 km from the A587, 7.2 km from the M55. 0.7 km from the nearest railway station	2 (28,654)	Large office complex	1945-1990 age range	Average quality	All vacant	N/A	Average rateable value: not known. The area is accessed off the B5265 and is in close proximity to the A587.	Whole site is vacant and provides a redevelopment opportunity, with 28,654 sqm of existing floorspace on 8.36 ha. These properties are no longer needed by the public sector, and it is very unlikely that a private sector business, or businesses, could be found who would occupy even a portion of this extensive complex. This is particularly, true as the historic properties of Warbreck House will not meet the specification of modern office occupiers while the residential location of the site will be less attractive to businesses than competing alternatives in Central Blackpool or in the Whitehills/Blackpool Airport Enterprise Zone Area to the south, which links to the M55. Redevelopment of this site for E(g)/B-Class uses could have viability constraints. Certainly, redeveloping this office site for more modern office uses would not generate the necessary value uplift to fund the scheme, even if supported by demand. Market interest is for industrial, and warehouse uses but a large scale B2/B8 development here may not be appropriate in this primarily residential area, even if found to be viable. A mixed use redevelopment scheme is thus most likely here. It is understood that landowner aspirations are for a primarily residential scheme, which would	Large vacant office complex. Site is not derelict but as discussed, for reasons of demand and viability is unlikely to be redeveloped or reused for E(g)/B-Class uses.	E

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
											generate the value to allow the clearance of the site, with some ancillary employment generating uses. It is understood those ancillary uses are presently intended to include health, community and retail/hot food options, supporting the housing. No E(g)/B-Class uses are being put forward which is again unsurprising given the mostly residential character of the area.		
Total	180.86			785 (553,309)									

Source: BE Group, 2023

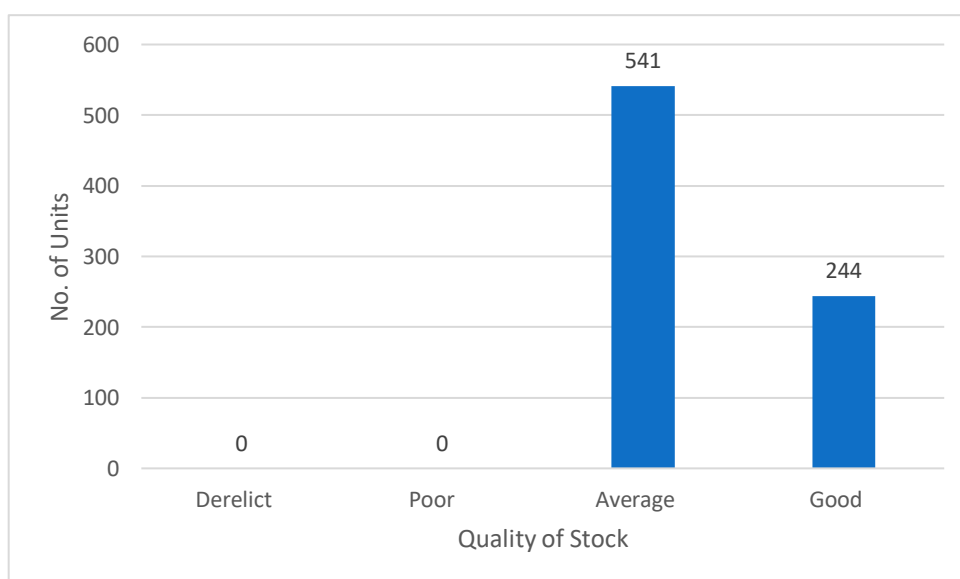
7.57 As Figure 52 shows, 504 of the 785 total units, or just under two thirds, were developed over 1945-90 while 79 (10.1 percent) were built since 2010, i.e., are new stock. None of the stock can be dated to before 1945, i.e., historic mills. In terms of quality, as Figure 53 shows, a qualitative review of the stock indicates that 68.9 percent of the stock, 541 units, is of average quality and 31.1 percent, 244 units, is of good quality. None of the stock can be classed as poor quality and, as mentioned, no units are derelict.

Figure 52 - Blackpool Employment Area Stock – By Age Range



Source: BE Group, 2023

Figure 53 - Blackpool Employment Area Stock – By Quality Range

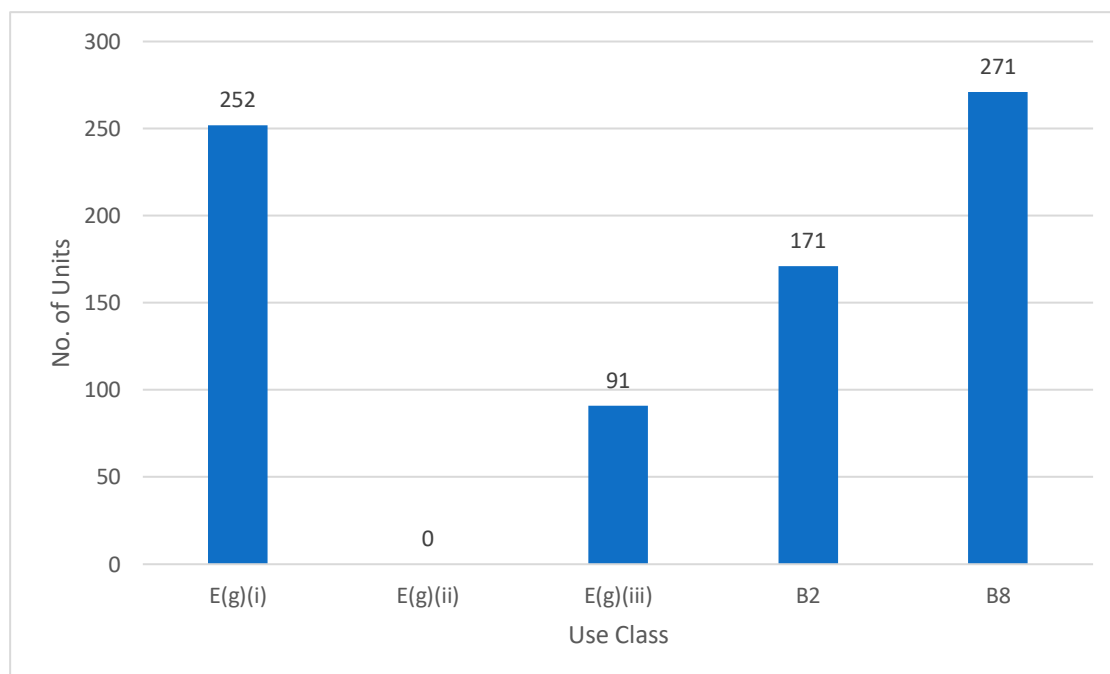


Source: BE Group, 2023

- 7.58 The high occupancy rates and lack of poor quality, derelict or very old stock suggests that Blackpool does not have any problems with surplus premises. If there are issues with the accommodation it is issues of undersupply of types and tenures of property, rather than oversupplies.
- 7.59 The vast majority of the stock is found in the south of the Borough, on, or south of the A583 Preston New Road and the A5073 Waterloo Road. This specifically includes the Employment Areas of Chiswick Grove Estate, Clifton Road Industrial Estate, Blackpool and Fylde Industrial Estate, Preston New Road, Vicarage Lane Estate and Blackpool Enterprise Zone - Blackpool Business Park/Squires Gate Estate/Sycamore Trading Estate. Collectively these locations account for 447 premises, or 56.9 percent of the total and 381,592 sqm of floorspace, or 69.0 percent of the total.
- 7.60 This is not viewed as a particular concern by stakeholders who highlight the M55 Corridor area as a focus for market interest with businesses prioritising strategic road access to the wider sub-region/region over links with Blackpool communities' further north which might provide labour sources. Certainly, the majority of recent investment in E(g)/B-Class accommodation has been in the Squires Gate and Whitehills areas, shared between Blackpool and Fylde.
- 7.61 The northern and eastern parts of Blackpool Borough depend on three main industrial estates – Kincaig Business Park/Moorfields Estate, Fox Industrial Estate and Mowbray Drive – which between them offer 190 units and 67,133 sqm of floorspace or 24.2 percent and 12.1 percent of the totals. These estates provide a mix of mostly smaller industrial and warehouse units, aimed at local firms. Also, North Blackpool Technology Park which, while it accommodates some larger employers, is also a key source of micro business office space serving Blackpool and adjoining settlements of Wyre.
- 7.62 Figure 54 shows a split of the 785 identified units by relevant Use Class. One, perhaps surprising result is that the stock includes 252 E(g)(i) offices or nearly a third of the total. Aside from a few larger properties at North Blackpool Technology Park, these mostly comprise smaller suites, of sub-400 sqm each found in a selection of serviced business centres across the Borough, with the most modern options being at Hawking Place, North Blackpool Technology Park. There seems to be a supply gap for larger private offices although it is worth noting that larger offices can be found in adjoining areas of Fylde Borough including the Avro Crescent/Sir Frank Whittle Way area of the Blackpool Airport Enterprise Zone and at Whitehills Business Park. Stakeholders do not identify an

urgent need for more larger offices in Blackpool Borough while redevelopment plans for the Blackpool Airport Buildings, which fall into Fylde Borough, and are discussed above, are for a substantial new office park serving the whole of the Fylde Coast.

Figure 54 - Blackpool Employment Area Stock – By Use Class



Source: BE Group, 2023

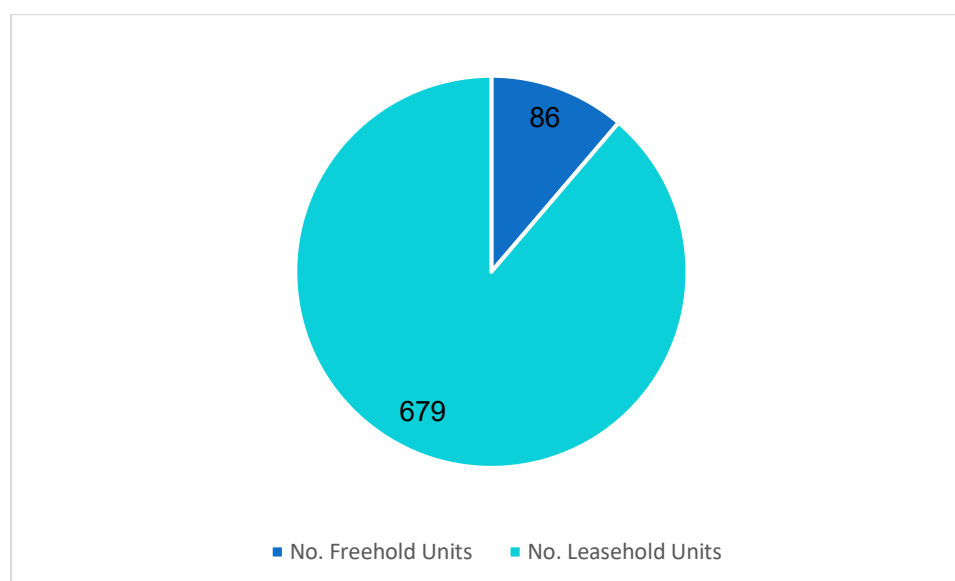
7.63 Another third of the stock, 262 units, are in light or general industrial use. That stock is relatively diverse but mostly comprises sub-1,000 sqm units apart from the long established premises of major employers. Blackpool Business Park at Blackpool Airport Enterprise Zone is the main source of modern industrial stock in Blackpool. Agents report ongoing high demand for smaller industrial and storage premises, but this need is being met by the market, indeed all relevant private sector led development activity in Blackpool, and across the Fylde Coast is for smaller units of mostly sub-500 sqm each. However, there seems to be a supply gap for larger units which are not proposed anywhere apart from a couple of plots at Blackpool Business Park, and which might allow established firms to expand locally.

7.64 The final third of the supply comprises 271 B8 storage and distribution units. B8 units, in a range of sizes mostly up to around 1,000 sqm each, are found across all the industrial estates of Blackpool, interlinked with the older industrial stock. There are few modern B8 warehouses in the Borough and particularly no larger logistics premises, although

strategic scale logistics options would be unlikely away from the M55, M6 and A6 national corridors and are not sought by the market in Blackpool.

- 7.65 Figure 55 splits the stock by tenure showing that, out of 765 units where tenure could be established, 88.7 percent were leasehold. Only Clifton Road and Moor Park had more than 15 freehold units each and none were on the market at the time of writing. Stakeholders regularly identify a shortage of freehold options, of all Use Classes, against requirements from businesses seeking stock for owner occupation.

Figure 55 – Blackpool Employment Area Stock – By Tenure



Source: BE Group, 2023

- 7.66 All the infill opportunities identified are discussed in the employment sites section above. Given the high occupancy rates and reasonable quality of most stock, no large scale redevelopment opportunities have been identified, apart from Warbreck Hill and Preston New Road (NS&I). The latter is occupied at present but may become vacant in the long term. Both are very large offices in mostly residential areas which are likely to be redeveloped for non E(g)/B-Class uses.
- 7.67 Again, excepting Warbreck Hill and Preston New Road (NS&I), the Employment Areas can all be graded A-C. It is thus recommended that the remaining 11 continue to be identified and protected for E(g)/B-Class uses in the Local Plan, as areas as a whole, even if enhanced permitted development rights make it harder to protect individual properties from changes of use.

Fylde – Employment Area Assessments

- 7.68 Table 65 provides the assessment of 39 Employment Areas in Fylde Borough. This includes 29 Employment Areas allocated under Policy EC1 of the Fylde Local Plan to 2032 (2021). For this exercise, two Local Plan allocated Employment Areas – Queensway Industrial Estate, Snowden Road, St Annes and Scafell Road, Snowden Road / Everest Road, St Annes – have been combined as they cover the interrelated area of Queensway Industrial Estate. Ten other locations, identified by the Council as also potentially including E(g)/B-Class premises, are also reviewed here (some of these were identified for employment uses in Local Plan mapping, but not in policy description). Within those ten sites, three comprise farms in agricultural use, where any other businesses trading from the area are ancillary to farm operations:
- Cherry Blossom Farm, Blackpool Road, Newton
 - Daisy Meadow Farm, New Hey Lane, Newton
 - Gorst Farm, Lodge Lane, Elswick.
- 7.69 Additionally, 300 Clifton Drive South, St Annes is in medical use rather than providing E(G)(i) offices. It is therefore not recommended that these locations be allocated for E(g)/B-Class uses in the next Local Plan.
- 7.70 Excluding these four locations leaves 35 areas, comprising 283.49 ha of mostly developed employment land. 57.5 percent of this, 162.95 ha, comprises strategic facilities for the two largest employers of the Borough – Westinghouse Springfield, Salwick and BAE Systems, Warton. All other Employment Areas are sub-20 ha in size, and most are sub-10 ha in size.
- 7.71 Analysis of VOA data identifies a supply of 593 properties in these 35 Employment Areas, comprising 333,894 sqm of floorspace (although this excludes details on the premises/floorspace supply in Westinghouse Springfield, Salwick and BAE Systems, Warton, where data is not available). By far the largest supply is in Whitehills Park, Whitehills which offers 139 units comprising 45,596 sqm of floorspace, or 23.4 percent of the unit total and 13.7 percent of the floorspace total.

Table 65 – Fylde - Assessment of Existing Employment Areas (Existing Premises)

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
Employment Areas Allocated under Local Plan Policy EC1													
Queensway Industrial Estate, Snowden Road, St Annes	9.07	Sizeable, average quality industrial estate located off the B5261 and accessed via a residential road. The area comprises a range of uses and sizes with the main occupiers being QEP and Zell-em Design Group	Area enjoys some prominence on local roads, 2.9 km from the A5230 and 5.8 km from the M55, Junction 4. The site is 0.5 km from a bus stop and 3 km from St Annes railway station.	41 (47,407)	14 (34 percent) of the units are general industrial, 18 are warehouses. There are also 9 offices at Freedom House and several other properties along Snowden Road. The Estate has a diverse property offer, ranging from sub-100 sqm offices and units up to large factories of up to 6, 234 sqm each.	All but one unit is in the 1945-1990 age range	All average quality	4 vacant properties, 2 offices and 2 B2 units, totalling 504 sqm. The area is thus 90 percent occupied. The offices have a quoting rent of £9.25/sqft (£100/sqm), rents for the industrial units are not stated.	33 (81 percent) of the units are leasehold, 8 are freehold.	Average rateable value: £42.70/sqm. Access and internal roads narrowed due to the presence of on-road parking. Most sites have allocated parking on premises.	Existing industrial estate is densely developed, with the main undeveloped area comprising a timber yard for Jewson. 3.8 ha of expansion land to the east is identified in the Local Plan – FY1 Queensway Industrial Estate, Snowden Road, St Annes – this is discussed separately above.	Established and successful local industrial estate. This should continue to be protected in the Local Plan.	C
Blackpool Airport, Squires Gate	3.45	Good quality office park accessed off the A5230 via Amy Johnson Way. Part of the larger Airport Enterprise Zone Employment Area. The park is mainly made up of larger, 2 storey,	Well located on the edge of Blackpool, just off the A5230 Squires Gate Lane, to the rear of a retail park and 1.5	26 (8,480)	All but one of the relevant premises here is an office, with suites ranging from 26 sqm to	Scheme build between 1990 and 2010.	The larger units fronting the park are of good quality (14),	3 offices are vacant and, on the market, totalling 568 sqm. The park is thus 88 percent occupied. The	All units are leasehold.	Average rateable value: £99.9/sqm. Good access off the A5230 with wide	Area is fully developed. The further growth opportunities are elsewhere in the Enterprise Zone.	Key source of small-medium sized office accommodation, in a prime location on the Fylde Coast.	B

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
		offices but a few smaller, one storey, office buildings are observed at the end of the park.	km from Squires Gate railway station.		1,303 sqm in size.		smaller offices to the rear (the Pavilions, 12) are of average quality	offices have a quoting rent of £10.24/sqft (£110/sqm).		internal roads and allocated parking provided for each premises.			
Preston Road, Lytham	3.33	Employment area split into two sections, split by Lidl, with a self-contained factory premises occupied by Dudley Industries in the east and a row of multi let industrial units in the west.	Well located area on the A584 Preston Road into Lytham, a bus route. 2.2 km east of Lytham railway station, with shops adjacent.	5 (7,426)	All but one unit is in warehouse use. The smaller properties are around 400 sqm in size each.	All 1945-1990	All average quality	Fully occupied	All leasehold	Average rateable value: £25.93/sqm. Good access off the A584 but narrow internal roads. Parts of the area are in Flood Zone 3, with footpaths and greenspace adjacent.	The Dudley Industries site has some undeveloped land to the south but it is not clear if this is developable as this land is in Flood Zone 3.	The Area includes several key industrial premises, including space for a larger employer, and should be protected in the Local Plan.	C
Dock Road, Lytham	1.61	Average quality facilities for major employer Helical Technology located off the A584 bordering the Main Drain watercourse. The site comprises workshops, warehousing and offices of varying ages and quality. Two warehouses, one occupied by Vetplus,	Well located area off the A584 Preston Road into Lytham, a bus route. 2.1 km east of Lytham railway station, with shops nearby.	9 (5,180)	Area includes 5 (56 percent) warehouse units, 3 general industrial units and one office. Most space falls within the 3,132 sqm Helical facility	Main factory uses are 1945-1990 in age. Three B8 units built since 2010	All average quality, except for the three most recently developed B8 units which are good quality.	Fully occupied	All but one are freehold	Average rateable value: £26.01/sqm. Accessed off the A584 down Dock Road which is fairly wide while the internal roads of Helical Technology's premises are	0.9 ha of expansion land to the north of Dock Road is identified in the Local Plan – FY2 Dock Road, Lytham – this is discussed separately above	Active local employment area, including premises for a larger employer, which has seen some growth, and should be protected in the Local Plan. The area boundary should be adjusted north, to reflect recent development.	C

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
		also fall within the employment area, found on the approach to the gates of Helical Technology's premises. Land north of Dock Road, outside the area boundary, is also now developed for B8 uses for Helical and could be included in the employment area.									sufficiently wide with allocated parking. Parts of the area are in Flood Zone 3 and greenspace adjacent.			
Boundary Road, Lytham (Lidun/Lidun Park Industrial Estate)	3.61	Located off the A584, this average quality industrial estate is fronted by a McDonald's restaurant, comprising a mix of B2 and B8 units.	Well located area off the A584 Preston Road into Lytham, a bus route. 2.6 km east of Lytham railway station, and fronted by a hot food restaurant	19 (13,257)	Area split relatively evenly between general industrial units (10) and warehouses (9). Estate mixes smaller units of mostly sub-150 sqm each and larger properties of up to 4,492 sqm each.	All built 1945-90	All average quality	Fully occupied	All but two are leasehold	Average rateable value: £58.00/sqm. Good access off the A584 with on premises parking provided. On street parking can narrow internal roads in places. Parts of the area are in Flood Zone 3.	Land in the north of the estate is in use for caravan storage. 0.7 ha of expansion land to the south west is identified in the Local Plan – FY3 Boundary Road, Lytham – this is discussed separately above.	Although further expansion here appears unlikely the existing estate remains active, accommodating several larger employers. It should continue to be protected in the Local Plan.	C	
Naze Lane, Freckleton	4.53	Rural industrial estate located south east of BAE Warton close to the Ribble Estuary. The estate comprises sites for vehicle repair services, Waltons	Backland estate, served by rural roads, 4.7 km south of the A583 and 6.2 km from Kirkham	5 (6,905)	Mixed general industrial (3) and warehouses (2). Includes 3 properties of around 100	4 units built 1945-90, Polytank Group premises built in stages, post 2000	All average quality	Fully occupied	All freehold	Average rateable value: £28.5/sqm. Access takes vehicles through	2.4 ha of expansion land to the south is identified in the Local Plan – FY8 Naze Lane, Freckleton – this is discussed separately above.	Small rural industrial estate. Continues to have value accommodating several key local employers, most notably Polytank. Even if no further	D	

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition						Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure				Other Issues
		Coach Hire and a large premises of Polytank Group.	and Wesham railway station		sqm each as well as the Polytank Group. Building of 5,870 sqm.					residential streets. The immediate access road is narrow but internal roads are wider with on-site parking. Internal roads are mostly tarmacked with one stretch of dirt track	Two very small infill plots exist west and south east of the entrance off Naze Lane, of 0.10 ha and 0.18 ha, respectively. This land is now subject to a full planning application for 12 industrial units of 91 sqm each (App. No. 23/0759).	expansion occurs here this location should continue to be protected in the Local Plan.	
Kirkham Trading Park, Kirkham	4.85	Average quality industrial estate located off the A583 that is predominantly, but not exclusively, occupied by B8 uses. Screwfix and Travis Perkins have large footprints on the site.	Area enjoys local prominence off the A583, close to a bus route. It is 5.1 km from the M55 and 1.9 km from Kirkham and Wesham railway station	11 (13,155)	Area includes 7 (64 percent) B8 units, 2 general industrial units and 2 offices. Most units are mid-sized or larger, ranging from 425 sqm to 2,351 sqm each.	9 units built 1945-90, subject to some more recent extensions. The Travis Perkins units were built post 2010.	All average quality	Fully occupied	All but one are leasehold	Average rateable value: £36.56/sqm. Good access off the A583, internal roads narrowed by on-street parking.	Further expansion not possible without encroaching into surrounding Green Belt.	Although trade uses dominate here, their remains a good mix of occupiers and the Park is a useful source of larger B2/B8 units for the east of Fylde Borough. It should continue to be protected in the Local Plan.	C
Progress Mill, Orders Lane, Kirkham	2.24	Located in the middle of a residential area, this business park is home to a mix of uses including office, workshop and storage uses and comprises a sub-divided historic mill complex.	Located in a mostly residential area, 0.8 km west of an A583 junction, close to a bus route It is 3.5 km from the M55 and 1.1 km from Kirkham and	Up to 76 (subject to multiple sub-division options) (10,225)	Mixed area including: <ul style="list-style-type: none"> Offices: 21 (23 percent) Light industrial: 13 (17 percent) General industrial: 	Wider mill complex is pre-1945, subject to some more recent modernisation and extensions.	All average quality	Fully occupied	All are leasehold	Average rateable value: £56.5/sqm. Accessed via residential streets that can be narrowed due to road parking. Internal roads	Densely developed site, tightly bound by housing and urban greenspace.	The Mill is a key source of micro business space, including starter offices, in the east of Fylde Borough. It should continue to be protected in the Local Plan.	C

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
			Wesham railway station		25 (33 percent) • Storage: 17 (22 percent). All but 6 units are sub 300 sqm in size each.						are also narrowed, and one-way in places, due to on road parking and the dense nature of the area.			
Marquis Street/Richard Street, Kirkham	2.62	Small local industrial estate in Kirkham located just off the B5192 comprising older industrial units and a modern office premises occupied by Warden Construction	The area has local prominence, in Kirkham, but is somewhat removed from strategic routes, being 1.4 km from the A585 and 2.9 km from the M55. It is only 0.5 km from Kirkham and Wesham railway station however.	10 (6,456)	Area includes 6 general industrial units, 3 warehouses and one office. Unit sizes range from 166 sqm up to 1,284 sqm each.	9 units built 1945-90, 1 built 1990-2010.	All average quality	Fully occupied	6 freehold units, 4 leasehold.	Average rateable value: £32.33/sqm. Located off the B5192, this area is accessed via Station Road which is narrowed by the parked cars of the motor repair garage. Narrow roads are observed internally throughout the estate. Parts of the area fall into Flood Zone 3.	There is one undeveloped yard in the area, between Station Road and Richard Street. However, this appears to be in use by a haulage company. Elsewhere the area is tightly bound by other uses.	Small, local industrial estate. While not of particularly high economic value, the location is fully occupied supporting a range of established local businesses. It should continue to be protected in the Local Plan.	D	
Whitworth Street, Wesham	3.49	Large factory premises occupied by Fox's Biscuits. The premises is accessed just off the B5192 in Wesham.	The area is in the backlands in terms of its immediate position, albeit	1 (18,846)	General industrial factory	All built 1945-90	All average quality	Fully occupied	Freehold facility	Average rateable value: £19.39/sqm.	Densely developed site, tightly bound by other uses.	Grading reflects the importance of the occupier rather than the quality of the premises. If Fox's were ever to	B	

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
			centrally located in Wesham. It is only 0.8 km from the A585, however, and 2.6 km from the M55. It is only 0.3 km from Kirkham and Wesham railway station.								Accessed down residential streets narrowed by on-street parking. Parking is provided on premises while the internal roads have adequate space for HGVs. Parts of the area fall into Flood Zone 2.		vacate it is unlikely that a new private business could be found to occupy this older, urban factory with locally constrained access. Redevelopment for other appropriate uses would be the most likely outcome. However, subject to Fox's ongoing occupation, it should continue to be protected in the Local Plan..	
Westinghouse Springfield, Salwick	89.2	Large nuclear production facility in Salwick located in a rural area, but with good access to Salwick railway station and benefiting from the new M55 Junction 2 and associated link	As noted, the completion of the new Junction 2, M55, means that this area is now only 0.8 km from the A582 Edith Rigby Way and 1.8 km from the M55. The local Salwick railway station is to the immediate west.	VOA property data not fully available for this secure site	Predominantly general industrial operations	Most units built 1945-90. Several facilities demolished since 2017.	Not known	Not known	Not known	Average rateable value: Not known. Accessed via Station Road which is sufficiently wide. Internal roads and on-premises parking are also sufficient. Parts of the area fall into Flood Zone 2, Deepdale Brook runs through the	There are a diverse range of cleared and undeveloped plots. However, these fall within a secure site and are not available to meet general business needs.	Key facility, of national significance and a major local employer. The secure and specialist nature of the site makes it unique however, and it does not support more general business needs, for land or property. It should continue to be protected in the Local Plan.	A	

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition						Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure				Other Issues
										site, various greenspace and woodland in the area.			
BAE Systems, Warton	73.75	Large modern manufacturing and assembly facility for defence contractor, BAE Systems. The employment floorspace is located in three sections around Warton Aerodrome and can be accessed via the A584. Also forms part of Lancashire Enterprise Zone.	Located off the A584 and on a bus route. Area is 8.3 km from the M55 and 5.6 km from Lytham railway station.	VOA property data not fully available for this secure site	Predominantly general industrial operations	Most units built 1945-90	Not known	Not known	Not known	<p>Average rateable value: Not known.</p> <p>Accessed via the A584 with a wide entrance and internal roads. The accessibility of this Area has improved dramatically with the new Junction 2 on the M55 and Preston Western Distributor Road which gives Warton more direct motorway access.</p> <p>Small sections within Flood Zone 3 and the Green Belt. Southern section within a Site of Special Scientific</p>	Part of the Lancashire Enterprise Zone since 2011. Delivery of new premises has been negligible to date. Growth is expected over the next Local Plan period, driven by BAE's internal development and expansion plans, but all details on this remain confidential at this time.	Key strategic facility for the Fylde Coast, of national significance. The location has considerable growth potential. However, this will be driven by BAE's internal needs and decision making, distinct from the requirements of the local property market. It should continue to be protected in the Local Plan.	A

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
											Interest (Ribble Estuary), ENV1 Coastal Change Management Area along southern boundary and has a footpath running through.		
Blackpool and Fylde Industrial Estate, Whitehills	17.28	Large industrial estate lying predominantly in Fylde but extending across the border into Blackpool. The estate is in close proximity to the M55 junction 4 and is accessed off the A5230. The site mainly comprises smaller workshop units with some larger B8 uses. Separate from the industrial activity is a large self-contained office occupied by DWP.	The area is well located off the A5230, 2.5 km from the M55, Junction 4 and on a bus route.	37 (40,712)	Light industrial units predominate, with 22 properties (59 percent), also 5 general industrial units and 8 storage units as well as the 2 DWP office buildings. The E(g)(iii) workshops are all sub-100 sqm in size. The DWP offices comprise 21,895 sqm of floorspace.	All built 1945-90	All average quality	Fully occupied	All leasehold	Average rateable value: £73.67/sqm Good access off the M55 and A5230, internal roads of the multi-let industrial estate can become congested. Includes area of woodland, ponds and other environmental features.	Growth here is likely to be dependent on the future of the DWP offices and this is discussed in relation to Site FY6: DWP, Brunel Way, Whitehills, in Table 57 above.	Notwithstanding the DWP office this is primarily a local employment area and in particular it is a key source of smaller workshops for start-ups and micro firms from across Blackpool and Fylde. It should continue to be protected in the Local Plan.	C
Whitehills Park, Whitehills	11.39	Large high quality business park located in close proximity to the M55 junction accessed	Prominently located in the Whitehills area, close to	139 (45,596)	A mixed employment area including 80 office	Age range varies, with the majority of stock, 100 units or 73 percent developed	Most stock, 117 units or 85 percent	Five units were on the market at time of writing, 3	123 units (88 percent) are	Average rateable value: £83.1/sqm	There are a diverse range of development plots in, and around, Whitehills Park. These	High grade business park with a diverse offer of modern premises, including offices and	B

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
		via the A583. The estate contains a mix of offices, workshops and warehouses alongside retail, car dealerships, hotel and food and drink providers.	the A583 and 1.2 km from the M55, Junction 4. The area is 5.6 km east of Blackpool South Railway Station		suites (58 percent), mostly in the Olympic Court scheme and several multi-occupancy buildings. Also 37 light or general industrial properties and 22 warehouse units. The office suites are mostly sub-200 sqm in size, each. The industrial and warehouse uses are mostly sub-400 sqm each.	over 1990-2010 and some 22 units delivered since 2010.	can be classed as good quality	offices totalling 361 sqm and 2, B2 units totalling 462 sqm. Scheme is 96 percent occupied. Quoting rents for the offices are £10.46/sqft (£112/sqm) and for the industrial units are £7.26/sqft (£78/sqm)	leasehold. 16 freehold.	Located in close proximity to the M55 Junction 4, the business park is accessed via the A583. Wide roads are present internally while most premises have allocated on-site parking.	have been captured in the Local Plan and are discussed further above.	workshops, the site is well placed on the strategic highways network to be marketed to both local firms and inward investors. Its highest value is its ability to support local businesses with small premises, particularly smaller offices not readily available elsewhere other than a few business centres and at Blackpool Airport. There are a range of ongoing growth plans here, but most development in the pipeline is for light industrial units, with offices not felt to be viable in the present market. It should continue to be protected in the Local Plan.	
AXA/AEGON Offices, Ballam Road, Lytham	3.71	Office Park comprising four large, older office buildings located near the town centre of Lytham off Ballam Road. Occupiers include Atos, Aegon, Inenco and Beaverbrooks	Centrally located in Lytham, 0.5 km from Lytham railway station. 1.4 km from the A584 and 6.8 km from the M55	4 (16,001)	All offices, larger buildings of up to 8,020 sqm each	All 1945-90	All average quality	No vacancy. N.B. Beaverbrook's have purchased the 6,190 sqm Axa building and intend to retain the whole property for its own use.	2 freehold, 2 leasehold	Average rateable value: £89.03/sqm Located in close proximity to Ballam Road which provides good access to the offices. The entry and	Existing premises in use or held for the expansion of occupiers. Further development would not be possible without impacting on the right to light of the existing office buildings.	Very large offices, unique locally in that they mostly accommodate large private sector businesses rather than public sector organisations. The Axa building is vacant at present, but intended to be occupied	B

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
											internal roads are wide while parking is provided on premises. Parts of the site are in Flood Zone 3.		by Beaverbrooks, who will expand within the building. The properties have demonstrated that they can attract new occupiers, such as Beaverbrooks, when vacant or could be sub-divided to provide smaller suites, if needed. It should continue to be protected in the Local Plan.	
Jubilee House, Lytham	1.07	Large, modern office building with frontage onto the A584, on the edge of Lytham Green. The offices are of good quality and are occupied by several businesses.	The property has local prominence in Lytham, on the A584 route through the town and on a bus route. It is 1.4 km from Lytham Station	1 property (capable of sub division into up to 37 suites) (6,180)	Office building (incorporating an internal café, gym, salon and other services)	1945-90 building but, significantly refurbished and expanded in 2013-2015	Good quality	One vacant suite of 123 sqm with a quoting rent of £28/sqft (£302/sqm) although that will be inclusive of service charges. Office 98 percent occupied by floorspace.	All leasehold	Average rateable value: £106/sqm Good access off the A584 with large shared car park located around the back. Parts of the site are in Flood Zone 3.	The office uses could be extended to the rear, with the loss of some parking. Some 0.5 ha is available here. However, as the last refurbishment demolished offices that used to occupy some of this land, such an expansion is unlikely.	High quality offices. Along with the nearby AXA/AEGON Offices this facility is a relatively unique source of larger, in-settlement, private sector offices on the Fylde Coast which could be marketed to both local firms and inward investors. It should continue to be protected in the Local Plan.	B	
St George's Park, Kirkham	6.26	Business park located off the A585 comprising good quality office buildings as well as a large factory premises occupied by Kepak.	The scheme is prominently located off the A585 and on a bus route. The M55 Junction 3 is 2.9 km to the north. It is	22 (22,343)	Scheme includes 19 office suites (86 percent) in 7 buildings, 2 general industrial units and one B8	The offices were built in 1990-2010, other properties are 1945-90 in age range.	The offices are of good quality. Other properties of average quality.	1 vacant office of 136 sqm. Area 95 percent occupied. Quoting rent is £10/sqft (£108/sqm)	The offices are leasehold, other properties freehold.	Average rateable value: £68.69/sqm Good access off the A585 with adequately wide internal	Site fully developed and bound by other uses or greenspace.	Area accommodates a large employer but is also a useful source small and mid-sized unserved office space in the east of the Borough, accommodating a range	C	

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
			2.1 km from Kirkham and Wesham railway station. Pub/restaurant and gym on site.		storage use. The office suites are 82-358 sqm in size each.						roads and allocated parking.		of local legal, financial and creative industry businesses which might otherwise have to look either to Whitehills/Blackpool Airport, or to Preston. It should continue to be protected in the Local Plan.	
Fairfield Research Station, Greenhalgh	5.78	Large factory and office premises located off the A585 and occupied by Laleham	Prominently located off the A585, 0.7 km south of Junction 3, M55. It is 2.2 km from Kirkham and Wesham railway station. Pub/restaurant and gym on site.	2 (13,615)	An office and a general industrial unit	Core buildings date from 1945-90 but the majority of the Laleham date from 2000-2017	All average quality	Fully occupied	Leasehold	Average rateable value: £25.95/sqm Good access off A585. Internal roads are narrow but there are areas for HGVs to turn. Sufficient parking is provided on premises.	Undeveloped land in the area comprises woodland, ponds and other environmental features.	Active facilities for a major employer, which have seen considerable investment, suggesting a long term commitment to the location. It should continue to be protected in the Local Plan.	C	
Former RAF Camp, Hillock Lane, Warton	6.40	Rural, average quality, industrial and office premises located off Hillock Lane occupied by Helical Technology	Site is in a rural area, north of Warton, but only 2 km from the A584 and on a bus route.	3 (7,774)	General industrial use, incorporating HQ offices.	All 1945-90	All average quality	Fully occupied	Freehold	Average rateable value: Not known Hillock Lane provides sufficient width as do the internal roads while sufficient parking is	1.3 ha of undeveloped expansion land in the south of the site, comprising former airfield infrastructure. Green Belt to the east.	Facilities for an established local employer. It should continue to be protected in the Local Plan. Additionally, the Area is identified in the Adopted Local Plan to 2032 (2018), Strategic Policy EC1, as being for E(g) (B1) use classes only. In practice Helical	C	

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
											found on premises		Technology are a general industrial business (Use Class B2). The location also has a change of use consent, including B2 and B8 uses (App. No. 14/0508). Reflecting this, the Area should be identified, in the Local Plan, for the full range of E(g) and B-Class uses.	
Land Registry, Warton	5.19	Large self-contained office premises located on the A584, occupied by HM Land Registry.	Out of settlement area, but prominently located on the A584, between Lytham and Warton. On a bus route.	1 (3,775)	Office	1990-2000	All average quality	Fully occupied	Freehold	Average rateable value: £95/sqm Good access off the A584 and benefitting from improved access to the M55 from the new Junction 2 to the east. The internal roads are sufficiently wide and there is sufficient parking. Parts of area are in Flood Zone 3.	Undeveloped land in the area is in use as environmental mitigation, including ponds and wooded areas, including land with consent for a solar farm (App. No. 22/0449). Surrounded on three sides by Green Belt.	Facilities for an established public sector employer, with no identified plans for change. It should continue to be protected in the Local Plan.	C	
Brook Mill, Station Road, Wrea Green	1.77	Small, poor-average quality industrial estate located just off the B5260 centred around an old mill building.	Backland, edge of settlement industrial estate, 1.4 km	18 (5,082)	Mixed general industrial (11 units or 61 percent) and storage (7)	Core units, 14 (78 percent) are a pre-1945 mill. Some small scale	14 units area poor quality, others average	Fully occupied	All leasehold	Average rateable value: £34.35/sqm	0.79 ha field to the west could provide an expansion opportunity. Growth elsewhere is constrained by adjoining	Low value local employment area. The location continues to serve a function however, providing	D	

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
			south of the A583 and close to a bus route. Local services nearby.		units). All but 3 units are sub-400 sqm in size each.	development and extension since then.					Accessed off the B5260 down a narrow road. The internal roads are sufficiently wide with parking. Internal roads are not fully tarmacked	uses. This is highly unlikely though given the constrained access through the existing area, and the low value of the existing scheme. In the long term, the whole area might provide a regeneration and/or refurbishment opportunity but, at present, the properties are well used.	affordable premises to local firms which might struggle to find such budget space elsewhere. It should continue to be protected in the Local Plan.	
Clifton Business Park (Clifton Marsh Depot)	1.16	Five rows of average quality, multi-let workshop units located on the A584 with frontage onto the A road.	Area is prominently located on the A584 route and on a bus route. It is distant from other transport modes however.	14 (4,864)	All but 2 units are in general industrial use. All but two units are sub-450 sqm in size each.	10 units (71 percent) were developed over 1990-2000. Others date from the 1945-1990 period.	All average quality	Fully occupied	All leasehold	Average rateable value: £60.77/sqm Good access to A584 but internal roads within the estate are congested with disorganised parking. Parts of area are in Flood Zone 3.	Existing area fully developed. Further expansion would require incursion into the adjoining countryside and areas of high flood risk.	Small but active and prominent rural industrial estate. It should continue to be protected in the Local Plan.	D	
Mill Farm, Wesham	1.26	Located off the A585, this estate is made up of a collection of older, average quality, former farm buildings, some in use as workshops and the remainder as offices	Prominently located off the A585, 1.0 km south of Junction 3, M55. It is 1.4 km from Kirkham and Wesham railway	8 (1,073)	5 offices (63 percent), 3 general industrial units. Units are 33-339 sqm in size each.	All 1945-1990	All average quality	Fully occupied	All leasehold	Average rateable value: £57.63/sqm Good access to the A585 with overflow parking facilities to alleviate	Site now falls into the wider Mill Farm Sports Village (Study Ref. FY11), to the east which includes a developed B8 unit for Trilanco, roadside services and sports facilities and 7 further development plots.	These properties now fall within the wider Mill Farm Sports Village, where E(g)/B Class uses have been delivered and more are proposed. Future change is likely to include the redevelopment of the	B (Reflecting the wider Sports Village)	

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
			station. There are a range of services to the south								parking pressure.	Discussions with the area owners, and their agents, suggest that within the plots, 4.20 ha, in four sites is proposed for E(g), B2, B8 uses. This is discussed further in the employment supply section above. The existing Mill Farm buildings, identified as Plot E are being considered for redevelopment for further roadside services, linked to the adjacent Stadium and reflecting the frontage to the A585.	existing Mill Farm properties. A future Local Plan allocation should cover the wider area, reflecting completed development and known plans for change. It should, however, retain a countryside buffer to Fleetwood Road to east.	
Wareing's Site, Blackpool Road, Kirkham	3.50	Premises of construction company J. Wareing & Son. The premises is made up of seven average quality buildings comprising two offices and five industrial buildings.	Rural facilities but enjoying a prominent position on the A583, on a bus route, 4.3 km from the M55. It is 3.5 km from Kirkham and Wesham railway station	7 (6,910)	Site includes 5 general industrial buildings, likely incorporating B8 storage capacity, and 2 offices.	Main B2 facilities and HQ office completed over 1990-2010 (3 properties). Other units completed post 2010.	All good quality	Fully occupied	All freehold	Average rateable value: £27.32/sqm Good access off the A583 and adequate on-site parking.	Undeveloped land in the south of the area is in use for open storage.	Facilities for an established local employer, that has made considerable investments in the location, suggesting an interest in remaining here over the long term. It should continue to be protected in the Local Plan.	C	
Peel Hall Business Village, Westby	5.41	Rural, average quality industrial estate located off Peel Road comprising small	Rural site, with limited prominence, even on local roads. The	17 (1,906)	Mixed use site comprising: • 8 offices (47 percent)	All 1945-90	All average quality	Fully occupied	All leasehold	Average rateable value: £63.37/sqm	Northern quarter of the site, 0.97 ha, is undeveloped. Other land in the south east is in use	Modest rural employment area. In the long term it may provide opportunities for redevelopment. At	D	

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition						Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure				Other Issues
		workshop, offices and self-storage	area is 2.0 km from the A583 and 3.4 km from the M55. It is also 2 km from the nearest bus route and 2.5 km from services.		<ul style="list-style-type: none"> • 4 light industrial units (24 percent) • 3 general industrial units (18 percent) • 2 storage units (12 percent). Units 48-235 sqm each.					Peel Road is sufficiently wide, but the estate's access road is narrow while parking is constrained in the multi-let industrial section of the estate.	as a container storage facility.	present, however, it is well occupied, providing affordable premises to a range of rural businesses. It should continue to be protected in the Local Plan.	
Braithwaites Yard Business Park, Warton	1.33	Small industrial estate accessed off the A584 adjacent to a new residential development. The estate is made up of 14 average quality workshops, fronted by a car dealership.	Area has local prominence, off the A584 on the edge of Warton. Access to the M55 has improved with the new Junction 2 and Preston Western Distributor Road to the east. On a bus route. The area is 4.8 km from Lytham railway station and close to services.	14 (2,027)	Area comprises 11 general industrial units (79 percent) and 3 warehouses. All but 1 unit, sub 250 sqm in size each.	12 units (86 percent) built over 1945-90. 2 built over 1990-2010.	All average quality	Fully occupied	All leasehold	Average rateable value: £48.69/sqm Good access off the A584, internal roads could be prone to congestion.	Small infill plot of 0.15 ha in the north west.	Small but active local industrial estate. It should continue to be protected in the Local Plan, with the Local Plan policy mapping reflecting the actual area of employment use.	C
Mythop Lodge,	1.97	Rural premises located off Mythop Road solely occupied by electronics	Rural site, on a bus route but 1.6 km	5 (3,837)	Warehousing, incorporating showroom	All 1945-90	All average quality	Fully occupied	All leasehold	Average rateable value: £28.28/sqm	Further expansion not possible without	Small but active facilities for a local employer, albeit primarily in	D

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Weeton with Preese		retailer, Reliant for warehousing, a showroom and HQ offices. One dwelling fronts the site.	from the A583 and 2.5 km from the M55.		and ancillary office uses						Accessed via Mythop Road, the site has a sufficiently wide entrance as well as enough parking given there is only one occupier.	encroaching on surrounding countryside.	wholesale and trade use. It should continue to be protected in the Local Plan.	
Freckleton Boatyard, Freckleton	1.70	Small employment area with two access points, one via Naze Lane East and another down a narrow residential track. The area is split into three sections. The site accessed via Naze Lane is in use for boat storage. The remaining sites, accessed via Poolside, are made up of a premises occupied by fibreglass manufacturer, Marine and Industrial Mouldings, as well as a mixed site comprising a residence and dilapidated workshop units.	Backland site with constrained immediate access to all parts of the area. Site 1.1 km south of the A584, local services and a bus route	2 (1,228)	Space in general industrial use	Marine and Industrial Mouldings building developed 1990-2010. Other premises 1945-90.	Marine and Industrial Mouldings building is of average quality. Other premises appear largely derelict	Occupancy unclear	All freehold	Average rateable value: £18.9/sqm Two access roads, one route is through a residential area and down a narrow track. Parking space is sufficient considering the number of occupiers. Area is in Flood Zone 3.	Derelict premises in the south offers a very modest redevelopment opportunity of some 0.18 ha. However, given the access constraints and high flood risk, it is not clear what could be delivered here.	Marine and Industrial Mouldings premises appears to be the main active facility in the area. Elsewhere it is unclear what property remains in E(g)/B Class use, subject to a more detailed assessment of the premises. The area is of limited economic value and a formal allocation in the Local Plan for E(g)/B Class uses is not needed.	E	
Dingle Farm Rural Business Park, Newton	3.96	Rural multi-let industrial estate accessed down a narrow dirt track. Uses include	Backland, rural site in terms of its immediate	15 (2,318)	Area offers 9 (60 percent) light industrial units, 4	All 1945-90	All average quality	Fully occupied	All leasehold	Average rateable value: £39.06/sqm	Undeveloped land in the area is in use for open storage.	Low value local employment area. The area has significant access constraints and	D	

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				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
		workshops and indoor and outdoor storage	access. Area is 1 km north of the A583 and a bus route. The area is 2.4 km from Salwick railway station.		general industrial units and 2 warehouses. All but 3 units are sub-200 sqm in size each.						Accessed down narrow dirt track, the layout and parking are disorganised.		could not support further growth. However, the location continues to serve a function, providing affordable premises to local firms which might struggle to find such budget space elsewhere. It should continue to be protected in the Local Plan (N.B. The Area is already allocated on the Adopted Local Plan Policies Map and should be added to written policy for consistency but with limited uses supported to reflect ecological, flood risk and access constraints).	
Other Areas for Review														
Railway Arches 1, 4 & 5, Station Road, Kirkham	0.07	Workshop units located underneath the railway bridge of Kirkham and Wesham train station.	Centrally located units in Kirkham, adjacent to Kirkham and Wesham railway station, a bus route and services. The area is 1 km from the A585 and 2.5 km	4 (675)	2 units in general industrial use, 2 in storage use.	Pre 1945 infrastructure	All poor quality	Occupancy not known	All leasehold	Average rateable value: £29.02/sqm Located off the B5192, these premises do not have an allocated car park with parking observed on the pavement. Station Road is	Railway infrastructure in an urban area. No capacity for growth.	Small number of low grade workshops. They are of limited economic value but continue to offer some micro business accommodation and this could usefully be recognised in the Local Plan.	D	

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			from the M55, Junction 3.								narrowed by the parked cars of the motor repair garage opposite. Area in Flood Zone 3.			
Cherry Blossom Farm, Blackpool Road, Newton	N/A	Private self-storage facility located off the A583. Does not offer business accommodation.	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Private self-storage units rather than business accommodation or business storage. Not comparable to the other employment areas here.	N/A	
Moss Side Farm, Lytham Road, Moss Side, Westby	0.11	Large commercial farm, with a range of employment uses operating from it, off a B- Road in a rural location.	Rural site, 3.0 km from the A583. On a bus route. 0.1 km from Moss Side railway station	29 (5494)	Warehousing	All 1945-90	All average quality	Fully occupied	All leasehold	Average rateable value: £ 34.94/sqm. Rural scheme. Area in Flood Zone 3.	Undeveloped land in the south is in use for container and vehicle storage.	Area has a range of employment uses operating from it. Access is good and it provides effective local scale rural employment opportunities. The site should be allocated in the Local Plan for E(g)/B-Class uses. The allocation should cover the full area of the Farm, extending to some 2.12 ha.	C	
Carr Farm, Lodge Lane, Warton	0.10	Single low grade industrial unit, in a wider rural farm. In Green Belt with access constraints.	Rural site, 0.8 km from the A584 and a bus route. 3.1 km from Moss Side railway station.	1 (1,132)	General industrial	1990-2010 age range	Average	Occupied	Freehold	Average rateable value: £12.94/sqm Rural unit located off a narrow country road with	Single unit on an otherwise active farm.	Single low grade unit on an otherwise active farm. The Area is in Green Belt with poor access and nearby neighbours. An allocation for E(g)/B-	E	

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
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											parking on the premises. Area in Flood Zone 3 and in Green Belt.	Class uses in the local plan is not required.	
300 Clifton Drive South, St Annes	N/A	Located in St Anne's Town Centre, Therapy House is a two storey building that is currently in private medical use	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Building is in E(e) medical use rather than E(g)/B-Class employment use. While it is possible the premises may be re-occupied by an office use in the future, other uses including residential, community uses, E(c) financial/professional services and leisure are also possible here.	N/A
Daisy Meadow Farm, New Hey Lane, Newton	N/A	Rural farm premises accessed via New Hey Lane, a narrow country road. The buildings are in use for farm activities only, including horse stabling.	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Farm in agricultural use. Any other businesses which may be trading from the location are ancillary or unauthorised.	N/A
Coppice Farm, West Moss Lane, Ballam, Westby (Coppice Business Park)	1.28	Rural farm location, being redeveloped for a light industrial location with two units newly built and in use and six rows of light industrial units under construction.	Location accessed by rural roads, distant from the strategic road network, 5.7 km from the A583 and 6.5 km from the M55. 2.9	2 (Space for up to 40 further units under construction) (989 (3,130 under construction))	1 light industrial unit completed and occupied, 40 under construction. 1 unit in storage use.	Completed units in the 1945-90 age range, but substantially refurbished post-2010	All good quality	The 40 units under construction are on the market. The units under construction range in size from 60 sqm to 125 sqm, some	All leasehold	Average rateable value: £25.35/sqm Accessed down narrow country lane, the current premises has sufficient on-	Site under development	Farm being redeveloped for a local industrial estate. It will offer light industrial space, particularly to rural businesses in the centre and east of the Borough for which there is good demand. Delivery has been slow, but the site is	C (Subject to scheme completion)

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				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
			km from a bus route and 3.4 km from Ansdell and Fairhaven railway station					with mezzanine floors. The quoting rent, on average is, £13.50/sqft (£145.30/sqm)		site parking. Area in Flood Zone 3		nearing completion. The new Coppice Business Park should be allocated, for relevant uses in the Local Plan (N.B. The Area is already allocated on the Adopted Local Plan Policies Map and should be added to written policy for consistency but with limited uses supported to reflect ecological, flood risk and access constraints).	
Town Hall/Public Offices, St Annes Road West and Clifton Drive South, St. Annes	0.70	Council offices centrally located in St Anne's Town Centre. The Town Hall remains in use by Fylde Borough Council. The Public Offices building is now in use as a retail unit with ancillary café element, while the Tourism and Leisure building has been demolished and the site is to be redeveloped for flats.	Centrally located in St Annes, off the A584 and on a bus route, with services adjacent. 0.5 km from St Annes railway station.	3 (1,500)	Town Hall is in office use. Other buildings converted to, or being redeveloped for, other uses.	Buildings are Pre-1945 in age	Average quality	Space occupied or being converted to other uses.	All leasehold	Average rateable value: £55.00/sqm Good access off the A584 with on-site parking. In Conservation Area (ENV5).	Two properties, the Public Offices and the Tourism and Leisure building, converted to, or being redeveloped for, other uses. Any surplus space in the Town Hall could be sub-let to other businesses.	The Town Hall represents a sizeable source of office premises in St Annes Town Centre. While it is presently in use by the Council, it could provide offices for other firms as well moving forward. It should be allocated for E(g)(i) use in the Local Plan. The changes of use/redevelopment of the other buildings should be identified in the Local Plan, as appropriate.	C
The Crossroads Business Centre, Blackpool	0.36	Good quality, office park located on the A583 made up of two	Prominently located off the A583, on a bus route, on the edge of	15 (1,544)	All offices. Suites range from 83-145 sqm each.	All 1990-2010	Good quality	Fully occupied	All leasehold	Average rateable value: £73.24/sqm	Fully developed and bound by other uses, including urban greenspace.	Good quality, smaller, modern offices a valuable resource for business start-ups and micro firms in the	C

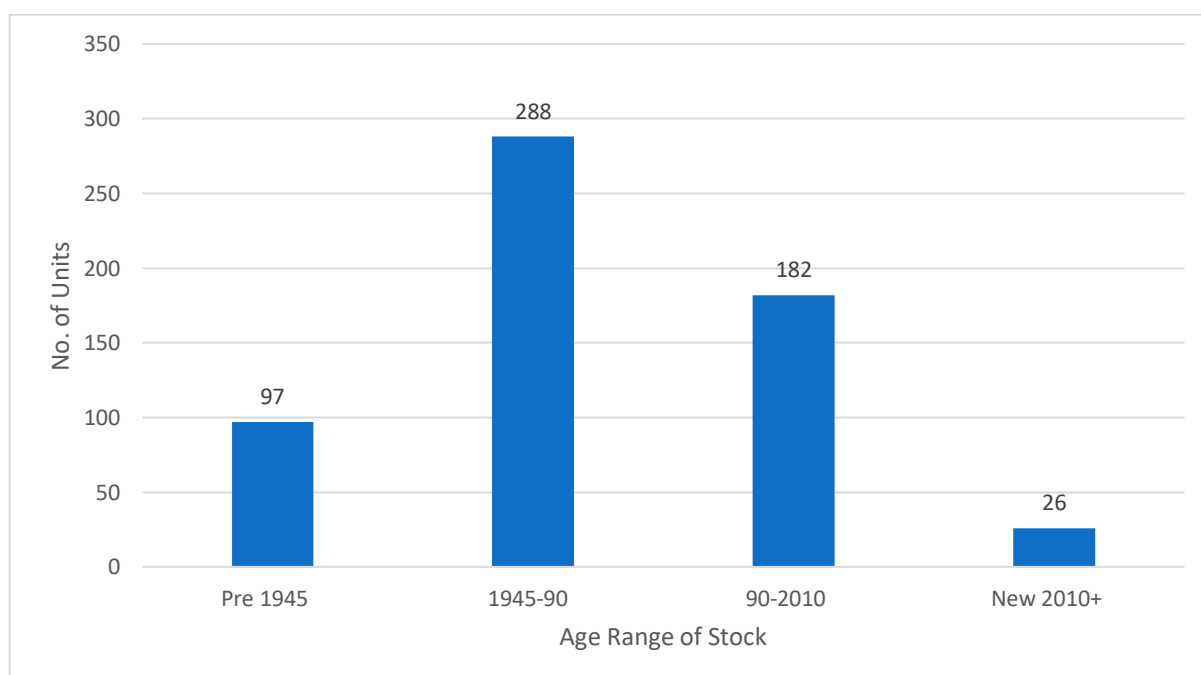
Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
Road, Kirkham		office buildings with multiple occupiers.	Kirkham, 5.3 km from the M55, Junction 2. 1.7 km from Kirkham and Wesham railway station								Accessed off the A583. Parking is insufficient for the number of occupiers present.		Borough, complimenting the larger self-contained offices found at St Georges Park to the north west. The area should be allocated in the Local Plan for E(g)(i) uses.	
Gorst Farm, Lodge Lane, Elswick	N/A	Rural farm premises accessed off the B5269. All premises appear in agricultural use. Facilities for motor repair business, Elswick Motors (Blackport Motors) adjacent.	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	The Farm is in agricultural use and the Council report that there are no lawful employment uses being pursued here. Fylde Council have pursued enforcement action against unauthorised employment activity at the location in the past. Therefore, an allocation, in the Local Plan, for E(g)/B-Class uses would not be appropriate here.	N/A
Total	283.49			593 (333,894)										

Source: BE Group, 2023

7.72 Only one Area showed evidence of significant dereliction. That was the very small Freckleton Boatyard, Freckleton (1.70 ha), which should not be considered a priority in the Local Plan for protection for E(g)/B-Class uses. All the Areas are over 90 percent occupied, at least in terms of completed premises and allowing for several locations, such as BAE Systems, Warton where the exact occupancy is unknown.

7.73 As Figure 56 shows, 288 of the 564 total units, or nearly half, were developed over 1945-90, while another 182 or just under a third, were developed over 1990-2010. Only 26 'new' units were identified, built since 2010, mostly located at Whitehills Business Park. However, conversely only a small proportion of the stock, 97 units or 16.4 percent, can be dated to before 1945. The latter mostly comprises historic mill premises in Kirkham and Wesham.

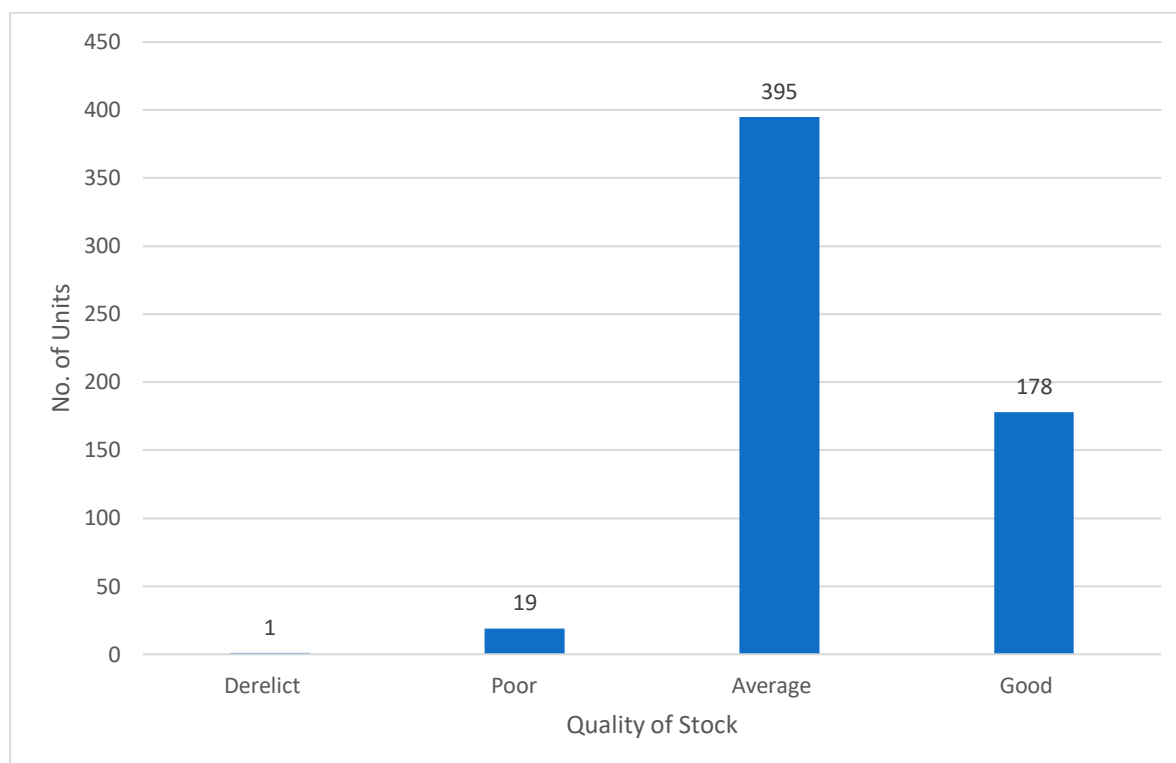
Figure 56 – Fylde Employment Area Stock – By Age Range



Source: BE Group, 2023

7.74 In terms of quality, as Figure 57 shows, a qualitative review of the stock indicates that around two thirds of the stock, 395 units, is of average quality and 30.0 percent, 178 units, is of good quality. Only 19 units were classed as poor while, as noted, only Freckleton Boatyard showed evidence of dereliction.

Figure 57 - Fylde Employment Area Stock – By Quality Range



Source: BE Group, 2023

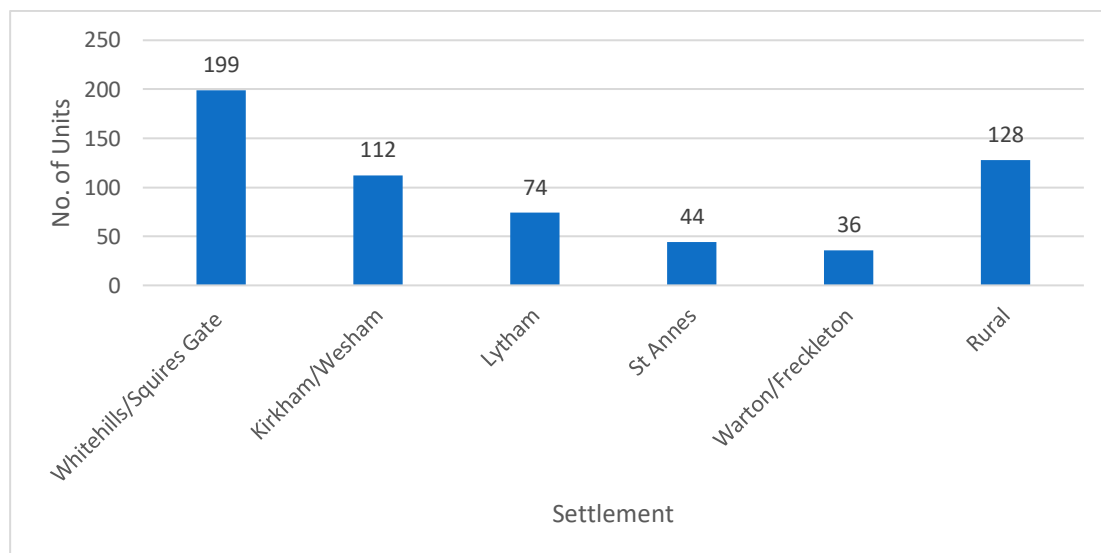
7.75 Thus, while Fylde Borough’s stock is slightly older than Blackpool’s it is well occupied, with few poor quality or derelict units. This suggests that Fylde, like Blackpool, does not have any problems with surplus premises. If there are issues with the accommodation it is issues of undersupply of types and tenures of property, rather than oversupplies.

7.76 Figure 58 splits the number of units by settlement area. It shows that over a third of the stock, 199 units, is located in the Whitehills area, extending to relevant parts of the Blackpool Airport Enterprise Zone. This reflects market demand, which remains focused on the M55 Corridor area, for all types and tenures of premises. It also means that a high proportion of the stock is well placed to support the Blackpool economy as well. This area has been a focus of recent investment into new E(g)/B-Class premises, most notably at Whitehills Business Park and, as noted above, judging by the number of planning consents on land in this area, remains an area of market interest.

7.77 Kirkham and Wesham are home to another 112 units, 18.9 percent of the total. This again reflects market demand, which is focused on the M55, but which also sees Kirkham and Wesham as a distinct market from Blackpool. Rural Fylde is reasonably well served by a diverse offer of local industrial estates, accommodating 128 units (21.6

percent). Some of these rural estates are isolated, but most are within 2 km of the Borough’s main A Roads.

Figure 58 - Fylde Employment Area Stock – Number of Units by Settlement



Source: BE Group, 2023

- 7.78 The offer in Lytham and St Annes is modest compared to other areas. Lytham is served by two main industrial estates on its eastern edge, plus larger offices towards the centre. St Annes is largely dependent on Queensway Industrial Estate for space, although the town enjoys good access to Whitehills and the Employment Areas at Blackpool Airport, further increasing the importance of these locations.
- 7.79 Apart from BAE facilities, Warton and Freckleton have only limited local employment space, although residents here can access a range of rural employment locations in the surrounding area, including the major employer of Westinghouse Springfield at Salwick, where further growth is likely.
- 7.80 Locations in the east of Fylde Borough, most notably the major employment sites of BAE and Westinghouse Springfield, will benefit from the new Junction 2, M55 which provides more direct motorway access. Previously, for BAE Warton, the most direct motorway access would have been north to Junction 3, M55 via rural roads. Motorway access for Westinghouse Springfield would have required passing through the Preston settlement area.
- 7.81 Table 66 shows a split of the 593 identified units by relevant Use Class. This shows that, by number of units at least, office stock dominates with 231 units or 39.0 percent of the

stock. This supply is focused at Whitehills/Squires Gate and Kirkham/Wesham, with a negligible offer elsewhere. The offer is dominated by smaller suites, of sub-200 sqm each, in multi-occupancy schemes, which remain in demand by the market. However, Fylde Borough does include an offer of larger, self-contained office properties focused at Blackpool Airport Enterprise Zone and St George’s Park, Kirkham. This offer is relatively unique in the Fylde Coast, allowing local office businesses to grow in the sub-region.

Table 66 - Fylde Employment Area Stock – By Use Class

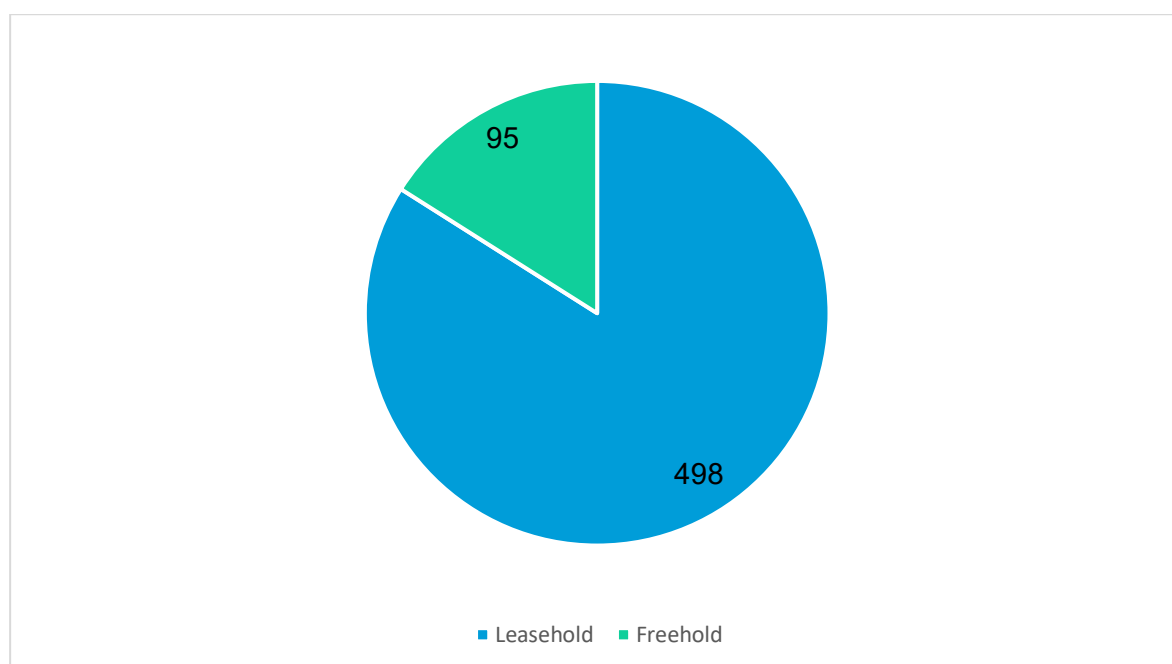
Settlement	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8
Whitehills/Squires Gate	107	-	25	37	30
Kirkham/Wesham	58	-	13	21	20
Lytham	6	-	-	27	21
St Annes	12	-	-	14	18
Warton/Freckleton	1	-	-	29	6
Rural	9	-	13	63	43
Total (Percent)	231 (39.0)	-	51 (8.6)	182 (30.7)	129 (21.8)

Source: BE Group, 2023

- 7.82 Another 39.3 percent of the stock, 233 units, are in light or general industrial use. That stock is relatively diverse but mostly comprises sub-400 sqm units. B2 units are spread relatively evenly around the Borough, with some focus in rural schemes. Light industrial units are more focused in select locations.
- 7.83 Agents report ongoing high demand for smaller industrial and storage premises, but this need is being met by the market, indeed all relevant private sector led development activity across the Fylde Coast is for smaller units of mostly sub-500 sqm each. However, there seems to be a supply gap for larger units which are not proposed anywhere in Fylde Borough, and which might allow established firms to expand locally.
- 7.84 The final 21.8 percent of the supply comprises 129 B8 storage and distribution units. The B8 units mostly comprise smaller storage properties of up to 400 sqm each, intermingled with the industrial space and focused in the rural area, Whitehills/Squires Gate, Kirkham/Wesham and Lytham. There are few modern B8 warehouses in the Borough and in particular no larger logistics premises, which might compete for inward investment requirements, even on the Motorway junctions.

7.85 Figure 59 splits the stock by tenure showing that, out of 593 units where tenure could be established, 84.0 percent were leasehold. Freehold units mostly comprise the premises of larger local businesses and, other than the small units of Coppice Farm, West Moss Lane, Ballam, Westby (Coppice Business Park), which are not yet complete, Fylde lacks an offer of smaller freehold properties which firms could seek to acquire. Stakeholders regularly identify a shortage of freehold options, of all Use Classes, against requirements from businesses seeking stock for owner occupation.

Figure 59 - Fylde Employment Area Stock – By Tenure



Source: BE Group, 2023

7.86 Infill opportunities in the 35 Employment Areas mostly comprise very small areas of unused land, frequently in rural industrial estates. Most undeveloped land is in use for open storage and HGV parking and so not readily available. Given the high occupancy rates and reasonable quality of most stock, no large scale redevelopment opportunities have been identified.

7.87 Apart from Freckleton Boatyard, Freckleton; Carr Farm, Lodge Lane, Warton and the four locations identified as not relevant, all the Employment Areas received a grade of A-D. It is thus recommended that these 33 Areas to be identified and protected for E(g)/B-Class uses in the Local Plan, as areas as a whole, even if enhanced permitted development rights make it harder to protect individual properties from changes of use.

The focus should be on the eight locations graded A-B in Fylde, which are the key locations for marketing Fylde Borough to wider markets.

Wyre – Employment Area Assessments

7.88 Table 67 provides the assessment of 34 Employment Areas in Wyre Borough. This includes 25 Employment Areas protected in the Wyre Local Plan (2011-2031) (2023). Nine other locations, identified by the Council as also potentially including E(g)/B-Class premises, are also reviewed here. Of these nine extra locations:

- Long Acres Farm falls into the allocated Employment Area Longacres Business Park, Stalmine and is reviewed in combination with that Employment Area
- Former Multi-ply Components Ltd, Trotters End, Inskip now appears to be wholly in residential use following the business relocation to Blackpool Airport Enterprise Zone.

7.89 The remaining 32 areas, comprise 131.34 ha of mostly developed employment land. By far the two largest Employment Areas are Copse Road, Fleetwood (29.19 ha) and Poulton Industrial Estate, Poulton-le-Fylde (34.95 ha). These comprise a total of 64.14 ha or nearly half the total. All other Employment Areas are sub-15 ha in size, and all but five are sub-5 ha in size.

7.90 Analysis of VOA data identifies a supply of 755 properties in these 32 Employment Areas, comprising 340,457 sqm of floorspace. By far the largest supply is again in Copse Road, Fleetwood which offers 103 units comprising 107,029 sqm of floorspace and Poulton Industrial Estate, Poulton-le-Fylde, which offers 226 units comprising 84,523 sqm. Collectively, these comprise 43.6 percent and 56.3 percent of the respective totals.

Table 67 – Wyre - Assessment of Existing Employment Areas (Existing Premises)

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
Employment Areas Allocated in the Wyre Local Plan (2011-2031) (2023)													
Dorset Avenue, Cleveleys	2.24	Located north of Cleveleys Town Centre, off the A587, this small average quality business park is set within a residential area. Cleveleys Business Centre is found in the centre of the area, offering office and storage space. This is surrounded by older units in B2 and B8 use.	Site is located in a mostly residential area, off the A587 Rossall Road. Distant from a railway station but close to bus and tram stops.	18 (11,365)	14 of the units (78 percent) comprise B2/B8 uses, mostly sub 400 sqm each in size, but including three larger 1,000-3,000 sqm units. Also includes 4 offices, located within the industrial space.	All in the 1945-90 age range	All average quality	Fully occupied	11 (61 percent) leasehold, 7 owner freehold	Average rateable value: £41.72/sqm. Internal roads narrowed due to on-road parking as there is insufficient parking on premises. Parts of site fall into Flood Zone 2.	No room for expansion. Area bounded by housing.	Small, average quality industrial estate, tightly bound in a residential area. Continues to serve a purpose accommodating a range of local businesses, plus several long established sub-regional manufacturing firms. It should continue to be protected in the Local Plan.	C
St Georges Lane, Cleveleys	0.45	Located on a back street of Cleveleys Town Centre this employment area is accessed via the A587 or a residential street, St Georges Avenue. St George's Lane is a very narrow road mainly made up of small garages alongside a bar, a gym and a mobility equipment shop.	Backland site, in a mostly residential area off the A587 Rossall Road. Distant from a railway station but close to bus and tram stops.	17 (1,227)	15 of the 17 units (88 percent) comprise small workshops in light industrial or storage use, most sub-100 sqm each in size.	All in the 1945-90 age range	All average quality	Fully occupied	14 (82 percent) freehold, 3 leasehold	Average rateable value: £49.55/sqm. Very narrow road and insufficient parking.	No room for expansion. Area bounded by housing/retail	Small area of backland workshops. Is of limited economic value but appears to be serving a purpose at present, providing affordable space to local micro firms. It should continue to be protected in the Local Plan.	D
Red Marsh Industrial Estate, Thornton	10.20	Located in Thornton Cleveleys, off the B5439, this mid-sized industrial estate stretches along either side of Red Marsh Drive. The estate comprises older workshop and warehouse	Backland site, in a mostly residential area, somewhat distant from the strategic road network,	132 (35,221)	A mostly industrial scheme, with 91 units (69 percent) classed as light industrial/general industrial, most	All in the 1945-90 age range	All average quality	Fully occupied	All leasehold	Average rateable value: £50.59/sqm. Access and internal roads narrowed by	No room for expansion. Bounded by other uses.	Active, fully occupied industrial state, meeting local needs. Site is adjacent to the Hillhouse Enterprise Zone but separate to that facility. It should continue to be	C

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition						Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure				Other Issues
		uses with a very small number of office uses. Occupiers include manufacturers, building materials suppliers and vehicle repairs providers.	1.8 km from the A585 and 13km from the M55. 5.3 km from the nearest railway station.		sub 550 sqm in size each. 38 units are classed as B8 warehousing.						on-road parking. Parts of the area fall into Flood Zone 3.	protected in the Local Plan.	
Copse Road, Fleetwood	29.19	Industrial estate located off the A585, stretching mainly along the eastern side of Copse Road with a small development of modern workshop units on the west side of the road. Premises are mainly older with general industrial uses dominating. HT1 and Fisherman's Friend both occupy large factories in the area.	The area is well located in the Fleetwood context, adjacent to the A585 Amounderness Way, on a bus route and served by three tram stops to the west.	103 (107,029)	A mostly industrial scheme, with 67 units (65 percent) classed as light industrial/general industrial, most sub 600 sqm in size each, alongside the larger production facilities. 33 units are classed as B8 warehousing.	97 units (94 percent) in the 1945-90 age range. The others aged 1990-2010.	All average quality	One B2 unit on the market of 329 sqm with a quoting rent of £7.06/sqft (£76.00/sqm). Scheme 99 percent occupied.	41 (40 percent) freehold, 62 leasehold	Average rateable value: £40.32/sqm. Good access off the A585, internal roads are wide while sufficient parking is provided on premises. Parts of the area fall into Flood Zone 3.	2.11 ha of cleared land south of the Wyre MOT Centre. The site has full planning consent for six commercial units comprising one unit of 2,323 sqm for a B2 use, three units consisting of 930 sqm of floorspace and two units consisting of 697 sqm floorspace all proposed with flexible of E(g), B2 and B8 uses. The six properties could provide up to 13 terraced units (App. No. 20/00128/FULMAJ). The scheme is presently being marketed, off plan, with the units to let. marketed as suitable for warehouse, workshop, trade counter, showroom and office use, subject to relevant planning consents. This is identified in the Wyre employment land supply as 'Site WY10: Land at Copse Road, Fleetwood '. Also, Lofthouse (Fisherman's Friend) now has a Member resolution to approve consent (subject to the signing of a Section 106	The main local industrial estate for Fleetwood, well located in the settlement and with some scope for further growth. The site accommodates two major employers, but the bulk of the stock is in use by local manufacturing and warehousing businesses. Future inward investment is more likely to go to the nearby Hillhouse Enterprise Zone than here. It should continue to be protected in the Local Plan.	C

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
											agreement), for a large new manufacturing facility to the east of the A585. At the time of writing, it is not clear if any of the existing Lofthouse facilities will be released for other uses. Elsewhere, land is in use and tightly bound by other uses.		
Poulton Industrial Estate, Poulton-le-Fylde	34.95	Located off the A586, east of Poulton-le-Fylde, this large employment area contains a Lidl and a gym towards the front of the estate. The estate is mainly made up of older industrial units with a small proportion of offices. A small development of office and workshop premises, built around 2000, are present towards the back of the estate.	Area is well located off the A586 Garstang Road East, on the edge of Poulton and 2 km from a railway station.	226 (84,523)	A mostly industrial scheme, with 123 units (54 percent) classed as light industrial/general industrial, most sub 400 sqm in size each, alongside the larger production facilities. 72 units are classed as B8 warehousing. There are also 31 offices, mostly smaller suites of sub-100 sqm in multi-occupancy buildings at Sovereign Court, Wyrefields and 30 Aldon Road.	205 units (91 percent) in the 1945-90 age range. The others aged 1990-2010.	All average quality	One B8 unit on the market of 929 sqm with a quoting rent of £8.50/sqft (£37.67/sqm). Scheme 99.6 percent occupied.	48 (21 percent) freehold, 176 leasehold	Average rateable value: £40.98/sqm. Good access off the A586, while parking is provided on most premises, on-road parking narrows internal roads in places. Parts of the area fall into Flood Zone 3.	Some undeveloped land in the south, but it appears in full use by several recycling companies at this time, for sand, aggregate and metal open storage. The land is also in an area of high flood risk.	Key industrial estate for Poulton. Well located and well occupied, including some larger occupiers but mostly serving the local economy of Thornton, Cleveleys and Poulton. It should continue to be protected in the Local Plan.	C
Robson Way, Poulton-le-Fylde	3.58	Located opposite The Blackpool Sixth Form College on the B5268, this industrial estate is	Local industrial estate on the edge of Poulton-le-	18 (3,998)	All but one of the units is in B2 or B8 use, including 7 general	All in the 1945-90 age range	All average quality	Fully occupied	16 leasehold (89 percent), 2 freehold	Average rateable value: £41.07/sqm.	Area tightly bound by other uses. Undeveloped land in	Small, average quality industrial area. A lot of land is in low value open storage use, but this falls	D

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
		made up of older premises. The estate is fronted by the premises of Abelglass and Barry & Wilkinson while Hi-Line Caravan Transport store caravans in the plots behind. Robson Way itself is separate from these uses and contains units in storage and workshop use along with one office. Site is to the east of the Blackpool Mowbray Drive Employment Area but there is no public road link between the two.	Fylde but also linking to the wider Blackpool settlement area. The area is 0.6 km from the A586. It is on a bus route and 1.5 km from a railway station		industrial units and 10 warehouse units. Most are sub 400 sqm in size each.						Accessed off the B5268 which is sufficiently wide while the premises of Abelglass and Barry & Wilkinson have sufficient parking. Robson Way itself is a very narrow road	the area falls into the secure Westfields Caravan facility.	within the secure Westfields Caravan facility and is not available for wider development. The Westfields Caravan facility also prevents any public link west to the Mowbray Drive employment area of Blackpool. It should continue to be protected in the Local Plan.	
Bank View Industrial Estate, Hambleton	0.89	Located on the A588, the employment uses on this site are found behind a row of retail uses as well as a petrol station. The employment uses are made up of a vehicle repair service, a workshop occupied by PRS Electrical Contractors and an office.	Site sits to the rear of services on the A588 Shard Lane. It is also on a bus route.	3 (533)	2 B2 units and an office	All in the 1945-90 age range	All average quality	Fully occupied	All leasehold	Average rateable value: £78.75/sqm. Good access off the A588, sufficient parking is available internally. Parts of the area fall into Flood Zone 3	Expansion would require incursion into the countryside and areas of high flood risk.	Very small, average quality employment area, of only three units. All are in use however, so the area continues to serve a purpose. It should continue to be protected in the Local Plan.	D	
Sunny Bank Industrial Estate, Hambleton	0.43	Located at the edge of the Hambleton settlement, this industrial estate is accessed via Grange Road, a narrow rural lane. Located to the	A rural estate, located in backlands and separate from the strategic road network.	11 (1,096)	The 11 units are split between 2 light industrial units, 4 general industrial units and 4	All in the 1945-90 age range	All average quality	Fully occupied	8 leasehold (73 percent), 3 freehold	Average rateable value: £47.3/sqm. Accessed via a narrow country	Expansion would require incursion into the countryside and areas of high flood risk	Very small, average quality rural employment area. The location is of limited economic value but continues to serve a purpose, providing	D	

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition						Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure				Other Issues
		rear of a farm, the estate is dominated by motor trade uses with Saltcoat Motors being the main occupier and comprises small workshops.	It is 1.5 km from the A588, 14.9 km from the M55 and 5 km from a railway station.		warehouses. Plus 1 office. All but 1 unit is sub 150 sqm in size each.						road and internal roads very congested due to vehicle repair use. Parts of the area fall into Flood Zone 3	affordable premises to businesses in the rural economy. It should continue to be protected in the Local Plan.	
Old Coal Yard, Preesall	0.47	Located on the A588, this rural estate comprises two rows of modern workshop units. One row is occupied by a Café while the other is occupied by Astro Signs, A&G Precision & Sons and a tattoo studio	Located directly off A588 and on a bus route. 8.9 km from a railway station.	3 (369)	3 B2 units plus cafe and tattoo parlour	All in the 90-2010 age range	All average quality	Fully occupied	All leasehold	Average rateable value: £75.08/sqm. Good access off the A588, sufficient parking is available. Parts of the area fall into Flood Zone 3.	Expansion would require incursion into the countryside and areas of high flood risk	Very small, average quality rural employment area. The location is of limited economic value but continues to serve a purpose, providing premises to businesses in the rural economy. The growing presence of non E(g)/B-Class uses here needs to be monitored to see how the character of the area is changing and if a revised designation in the Local Plan is ultimately required.	D
Preesall Mill Industrial Estate, Preesall	0.41	Located at the edge of the Preesall settlement, this employment area comprises a single historic mill complex to the rear of housing. A & G Precision & Sons Limited are the owner occupier.	Rural site, 0.6 km from the A588 and on a bus route, but otherwise distant from strategic transport routes and railway stations.	1 (1,642)	Mill in B2 use	A pre-1945 mill, but building has modern extensions/ refurbishments	Average quality	Fully occupied	Freehold	Average rateable value: £25.5/sqm. To rear of housing, but access road is sufficiently wide. Internal roads are narrow while sufficient	Expansion would require incursion into the countryside	Area is in full use by a key local employer. Buildings have benefitted from ongoing investment and should therefore continue to be protected in the Local Plan, even though there is only one business in operation here. It should continue to be protected in the Local Plan.	C

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition						Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure				Other Issues
										parking is available			
Park Lane Garage, Preesall	0.57	Located just off the A588 this rural industrial estate is made up of rows of workshop units. Motor trades/trade is the most prevalent industry among occupiers.	Rural site, near the A588 and by a bus stop, but otherwise distant from strategic transport routes and railway stations	6 (1,018)	4 light industrial units, 1 general industrial, 1 warehouse unit	All in the 1945-90 age range	All average quality	Fully occupied	All freehold	Average rateable value: £71.19/sqm. A588 and B5377 are sufficiently wide while adequate parking is available on premises. Parts of the area fall into Flood Zone 3.	Expansion would require incursion into the countryside	Site mostly in trade/motor trade use but otherwise comprises an active rural employment area. It should continue to be protected in the Local Plan.	C
Nateby Technology Park, Nateby	0.77	Good quality rural business park, accessed via country roads. Nateby Technology Park is comprised of two office buildings split into several smaller office serviced suites and two other units, one in B8 use and the other in B2 use. Area is fronted by a bowling club.	Rural site, over 1 km from a bus route and 2.9 km from the A6.	19 (1,039)	17 served offices (all but 2, sub-50 sqm each), 1 general industrial, 1 warehouse unit	Pre-1945 farm buildings, refurbished and upgraded	All good quality	1, 99 sqm office, to let for £12.06/sqft (£130/sqm). Scheme 95 percent occupied.	The 17 offices are available leasehold, the other units are available freehold.	Average rateable value: £120.18/sqm. Accessed via narrow country road, while sufficient parking is available for the uses contained on site. Area fronted by green infrastructure	Expansion would require incursion into the countryside	Good quality rural business park, a key source of smaller office suites in eastern Wyre. It should continue to be protected in the Local Plan.	C
Taylors Lane Industrial Estate, Pilling	0.58	Located just off the A588, this employment area comprises three workshops/storage units	Rural parcel, but close to an A588 junction and on a bus route.	3 (448)	B2 units	All in the 1945-90 age range	All average quality	Fully occupied	All freehold	Average rateable value: £39.99/sqm.	Some land in the south of the area is undeveloped, but the land is in use for tractor parking at present and assumed not available.	Area is in full use by a local employer. It should continue to be protected in the Local Plan.	C

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues				
		occupied solely by Siromer Tractors.									Access road is sufficiently wide, while internal roads are also sufficiently wide and adequate parking is available. Parts of the area fall into Flood Zone 3.			
Green Lane West, Garstang	5.78	Located just off the A6, within the Garstang settlement, this industrial estate stretches along either side of Green Lane West. B2 and B8 uses are most prevalent within the area with a small presence of offices. Howdens and Coars Ltd both occupy large floorplates	Area has prominence on the A6 and is close to a bus route.	32 (15,088)	Includes 16 (50 percent) general industrial units, 13 warehouses and 3 offices	29 in the 1945-90 age range (91 percent). 1 90-2010 aged unit and 2 2010+ modern units.	All average quality	Fully occupied	23 leasehold (72 percent), 9 freehold	Average rateable value: £45.17/sqm. A 6 way junction used to access Green Lane West, from the A6, while Green Lane West itself is narrowed by on-road parking, as are the internal roads.	North of Green Lane is the Former LCC Depot (0.50 ha), which is vacant. This site has full consent for redevelopment of the existing depot to develop eight B2 industrial units of 106-167 sqm each or 1,474 sqm in total (843 sqm net of buildings to be cleared) (App. No. 17/00177/FULMAJ). Separately, the north of the site has consent for two units, one of 426 sqm and one of 153 sqm. The larger unit is proposed for the expansion of the applicant's business, Pugh's Piglets, the smaller one to be rented out by the applicant (App. No. 17/00210/FUL). This scheme would have a shared access with the above scheme and the two proposals have been designed to work together.	Key local industrial estate for Garstang. Well located off the A6. Fully occupied but with some growth options. It should continue to be protected in the Local Plan.	C	

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
											This site is considered above as part of the employment land supply.		
Riverside Industrial Park, Catterall	2.48	Located off the A6, on the edge of Catterall settlement, this average quality factory complex is owned and occupied by Collinson and comprises six buildings	Area has prominence on the A6 and is close to a bus route.	6 (9,824)	B2 production complex	All in the 1945-90 age range	All average quality	Fully occupied	All freehold	<p>Average rateable value: £31.44/sqm.</p> <p>Good access via A6, parking is provided on premises while internal roads are wide enough for HGV Vehicles. Parts of the area fall into Flood Zone 3.</p>	<p>Collison is seeking growth, with various options:</p> <p>Agricultural Land to the South (Employment Site WY3 Riverside Industrial Park Extension, Catterall, 3.42 ha)</p> <p>Owned by a nearby farm, Orchard House. Collinson have sought to acquire this site either to develop for its own uses or to deliver premises, with a developer partner, to support the growth of other businesses in the Garstang/Catterall area. This is discussed further in the employment land supply section above.</p> <p>Land to the north east (Up to 3.45 ha)</p> <p>Constrained by restrictive covenants and Flood Risk from adjacent River Wyre/River Calder, can only be developed for offices due to covenant. Collinson have consent for one modular office here. This will meet Collinson's needs. The rest of the site could be</p>	Facilities for a key local employer, which is seeking growth, albeit on sites which are constrained. Expansion is most likely to occur on the land to the south, subject to site acquisition. It should continue to be protected in the Local Plan.	C

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
											<p>developed for other offices but Collinson are not sure what demand exists for this. Collinson owns most of site, except one plot.</p> <p>Land to north west (0.76 ha)</p> <p>Constrained by restrictive covenants and Flood Risk from adjacent River Wyre. Mill House owns. Could only be used for car parking.</p>		
Brockholes Way, Catterall	14.38	Located just off the A6 in Catterall, this employment area comprises a mix of uses with B2 being the most abundant. Leach Holdings are the main occupier, owning and occupying a unit in the south of the estate that is in excess of 20,000 sqm.	Area has prominence on the A6 and is close to a bus route.	28 (1,304)	15 (54 percent) general industrial units and 6 warehouse units. The size of units varies considerably with 18 units of 0-1,100 sqm and 3 larger properties of 20,000-36,000 sqm. The area also accommodates 7 offices, mostly ancillary to the B2/B8 facilities.	24 in the 1945-90 age range (86 percent). 4 90-2010 aged units.	All average quality	Fully occupied	27 leasehold (96 percent), 1 freehold	<p>Average rateable value: £52.05/sqm.</p> <p>Access roads are sufficiently wide while internal roads are narrowed by on-road parking. Trees in the area subject to TPOs</p>	Land to the east is safeguarded in the Local Plan - Site Ref. WY15 Brockholes Industrial Estate Extension, Catterall (32.51 ha). There is consent for some expansion from the north eastern part of the adjacent Brockholes Way Estate. This is considered in the employment land supply analysis above.	Key industrial estate for Catterall, accommodating a diverse range of local employers plus several larger firms. A key source of mid-sized industrial units on the A6 Corridor. It should continue to be protected in the Local Plan.	C
Creamery Industrial Estate,	2.52	Rural industrial estate situated between the M6 motorway (without	Site has M6 visibility but is distant from	24 (5,261)	13 (54 percent) general industrial units and 9	18 in the 1945-90 age range (75	All average quality	Fully occupied	22 leasehold (92 percent), 2 freehold	<p>Average rateable value: £51.16 /sqm.</p>	Vacant land in the area is in use for caravan storage.	Small but well occupied and diverse local industrial estate, serving	C

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition						Opportunities for redevelopment/ expansion	Overall Comments	Site Grading		
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure				Other Issues	
Barnacre (nr Garstang)		nearby access) and the railway line. The estate is accessed down a country road with a low and narrow bridge limiting access from the west	any junction and 2.9 km from the A6. Access is via rural roads with a bus stop nearby.		warehouse units. The units are up to 550 sqm in size. The area also accommodates 2 offices.	percent). 6 90-2010 aged units.					Ray Lane is narrow with a narrow bridge, followed by a low bridge. Kenlis Road is also very narrow.	the rural economy but also linked to the A6 Corridor. It should continue to be protected in the Local Plan.		
Oakenclough Mill, Oakenclough	2.50	Average quality, rural industrial estate located in the east of the Wyre district comprising several industrial units built around old mill buildings.	Rural site, distant from the strategic road network.	14 (8,469)	9 (64 percent) general industrial units and 4 warehouse units. Most units are up to 550 sqm in size. The area also accommodates 1 office.	Historic mill buildings assumed to be pre-1945 in age.	All average quality	1, 45 sqm office, to let for £17.50/sqft (£188/sqm). Scheme 93 percent occupied.	8 leasehold (57 percent), 6 freehold	Average rateable value: £17.94/sqm.	Expansion would require incursion into the countryside and areas of high flood risk	Access roads and internal roads are narrow. Parts of the area fall into Flood Zone 3 and the Forest of Bowland.	Small, but active rural industrial estate. It should continue to be protected in the Local Plan.	C
Ray Lane Industrial Estate, Barnacre (nr Garstang)	4.05	Rural industrial estate located adjacent to Creamery Industrial Estate, on the opposite site of the railway track. The estate is accessed down a country road with a narrow bridge on the approach and is split into two parts, separated by Ray Lane. The bulk of the area is contained within the south, which comprises a private premises occupied by	Site is distant from M6/M55 and 2.9 km from the A6. Access is via rural roads with a bus stop nearby.	3 (12,295)	All B2 general industrial	All in the 1945-90 age range	All average quality	Fully occupied	2 freehold, 1 leasehold	Average rateable value: £35.26/sqm.	Walki have very limited expansion space fronting their facility, currently used as landscaping	Access roads and internal roads are narrow. Parts of the area fall into Flood Zone 3 and trees protected by TPOs on site.	Rural units for two sizeable rural employers, all space in active use. It should continue to be protected in the Local Plan.	D

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
		Walki while the northern section is a much smaller private premises occupied by Dewhurst Richard & Sons.											
Longacres Business Park, Stalmine	1.15	Located rurally, to the south east of Stalmine, this industrial estate is made up of a line of older units with a mix of B2 and B8 uses.	Accessed by rural roads, 0.8 km from the A588 and a bus route. Distant from other strategic transport networks.	11 (1,458)	5 (46 percent) general industrial units, 6 warehouse units. Units of 0-250 sqm each.	All in the 1945-90 age range	All average quality	Fully occupied	All leasehold	Average rateable value: £52.51/sqm. Narrow access and internal roads.	Undeveloped land in the east is taken up by a lake and associated greenspace.	Small but active and well used rural employment area, continuing to serve a function, meeting local business needs. It should continue to be protected in the Local Plan.	D
Back Lane - The Weind, Great Eccleston	0.51	Located behind Great Eccleston High Street, this average quality, local area is accessed through the middle of Great Eccleston Dental Surgery and the Courtyard Café. The area comprises two garage units, a workshop premises of Supplement Solutions and a larger premises occupied by Multiply Components	Centrally located in Great Eccleston, 0.25 km south of the A586 and on a bus route.	4 (1,304)	2 general industrial, 2 warehouse, Units of mixed sizes up to 789 sqm each.	All in the 1945-90 age range	All average quality	Fully occupied	All freehold	Average rateable value: £34.66/sqm. Accessed through the middle of a café and dentist. Internal roads are very narrow.	Tightly bound by other uses	Small scale backland employment area. Low value but well used at present, supporting several local firms. It should continue to be protected in the Local Plan.	D
Nightjar, Inskip	1.93	Located in a rural area south of Inskip, this estate comprises a nursery at the front and a mix of average quality workshop and office uses behind.	Rural site, more than 5 km from strategic roads and a rail station	19 (2,907)	11 (58 percent) light and general industrial units. 5 multi-occupancy offices in Unit 19. 3 warehouses. Most units sub-150 sqm in size each.	All in the 1945-90 age range	All average quality	Fully occupied	14 leasehold (74 percent), 5 freehold	Average rateable value: £48.29/sqm. Access and internal roads are sufficiently wide. Part of	Several infill plots in the existing area boundary: <ul style="list-style-type: none"> • 0.12 ha of grassed land, fronting the Inskip Pre-School Nursery • 0.06 ha of grassed land north of the Unit 19 offices • 0.06 ha of grassed land north east of Inskip Golf Club 	Small but active and well used rural employment area, continuing to serve a function, meeting local business needs. It should continue to be protected in the Local Plan.	D

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition						Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure				Other Issues
										the site is in Flood Zone 2.	Other land is in agricultural uses.		
Cabus Commerical Park, Cabus	2.14	Located on the A6, south of Hollins Lane, this average quality estate is a mix of B2 and B8 units along with one office fronted by a service station	Well located off the A6, and on a bus route. 5.9 km south of Junction 33, M6.	6 (3,372)	2 industrial units, 3 warehouses and an office. Units of mixed sizes up to 333 sqm each, plus one larger unit of 2,305 sqm.	All in the 1945-90 age range	All average quality	Fully occupied	All leasehold	Average rateable value: £42.49/sqm. Good access via the A6, internal roads disorganised and could potentially become congested	Undeveloped land in the estate appears to be in full use for HGV parking and open storage.	Small but active and well used rural employment area, continuing to serve a function, meeting local business needs. It should continue to be protected in the Local Plan.	D
Tarnacre Hall Business Park, St. Michaels	1.90	Rural estate located on the A586 between St Michael's on Wyre and Churchtown. The estate is made of two workshops occupied by two timber frame manufacturers, Maple and Flitcraft.	Rural employment area, 1.4 km from the A586 and 1 km from a bus route.	2 (3,341)	All general industrial units	All in the 1945-90 age range	All average quality	Fully occupied	All leasehold	Average rateable value: £24.78/sqm. Access roads sufficiently wide. Sufficient parking is available on premises for the uses contained. Part of the site is in Flood Zone 2.	Expansion would require incursion into the countryside 0.17 ha of grassland, to the north of Flitcraft.	Modern premises for two key rural employers. It should continue to be protected in the Local Plan.	C
Hillfoot Farm, Scorton	0.59	Located in the rural area, to the west of Scorton, this area is found adjacent to a farm and provides small scale workshops and container storage.	Rural employment area, 0.6 km east of the A6 and a bus route. 6.4 km from Junction 33, M6.	17 (1,207)	All B8 storage units. Smaller units of 32-105 sqm each.	All in the 1945-90 age range	All average quality	Fully occupied	All leasehold	Average rateable value: £45.47/sqm. Access and internal roads are narrow.	Brownfield land to the north, extending to the River Wyre. However, this land is in Flood Zone 3 so assumed not developable for relevant uses.	Small but active and well used rural employment area, continuing to serve a function, meeting local business needs. It should continue to be protected in the Local Plan.	D

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition						Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure				Other Issues
										Part of the site is in Flood Zone 3.			
Other Employment Areas (non designated)													
Hesketh House, Broadway, Fleetwood	2.76	Located on the A587, this area comprises a large office premises occupied by the NHS Business Services Authority. The premises is made up three interlinked older buildings.	Urban office facilities, well located off the A587 Broadway. On a bus route. 0.5 km from the Broadway Tram Stop	1 (11,116)	1 large office	All in the 1945-90 age range	All average quality	Fully occupied	All leasehold	Average rateable value not known. Accessed via the A587. Internal navigation is organised while car park at the back is large. Part of the site is in Flood Zone 3.	Very large parking area to the rear, 0.95 ha, may provide some infill options.	Large urban office. In full use by the public sector at present. This should be recognised in the Local Plan. If the occupier ever vacates, this older office is unlikely to be reoccupied by the private sector. Site would thus represent a redevelopment opportunity for uses appropriate for this mostly residential area.	C
Hallidays Farm, Moss Lane, Bilsborrow	0.34	This rural estate is found to the south of Myerscough and is accessed via a narrow country road. The estate is fronted by a café and comprises five industrial units as well outdoor caravan storage.	Rural scheme, 2 km west of the A6 and a bus route.	5 (1,300)	4 general industrial units, 1 warehouse, of 84-420 sqm each	All in the 1945-90 age range	All average quality	Fully occupied	All leasehold	Average rateable value: £61.2/sqm. Access road is narrow while internal roads are disorganised and prone to congestion.	Undeveloped land in the east is in full use for caravan storage.	Small but active and well used rural employment area, continuing to serve a function, meeting local business needs. This should be recognised in the Local Plan	D
Former Multi-ply Components Ltd, Trotters End, Inskip	0.41	Area appears to be fully in residential use. Any business trading from this location is ancillary to that use.	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Appears to be a residential area only.	N/A

Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition							Opportunities for redevelopment/ expansion	Overall Comments	Site Grading
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure	Other Issues			
Land at Mains Lane, Poulton-le-Fylde	0.30	Located on the A585, this newly constructed premises comprises a good quality office building and allocated parking.	On the A585, also a bus route. The site stands to benefit from the M55 Junction 3 to Fleetwood Corridor improvements, including the Skippool bypass which officially opened on 1 March 2024. 5.9 km to Poulton-le-Fylde railway station.	2 242	2 office suites in 1 property	New build	Good quality	Fully occupied	1 freehold, 1 leasehold	Average rateable value: £116.08/sqm. Good access via the A585. Sufficient parking available. Part of the site is in Flood Zone 3.	Site fully developed	New build, good quality office. This could usefully be recognised in the Local Plan.	C
Stubbins House Farm, Stubbins Lane, Cloughton-On-Brock	0.31	Located rurally, to the east of Catterall, this employment area is found next to a farm and comprises of two rows of units used for storage.	Rural area, 1.2 km from the A6, 0.7 km from a bus route.	8 (590)	8 storage units of 66-87 sqm each.	Developed in 90-2010 period, but converted to B8 use post 2020	All average quality	Fully occupied	All leasehold	Average rateable value: £68.13/sqm. Stubbins Lane is narrow	Expansion would require incursion into the countryside. Conversion of other farm buildings to E(g)/B-Class Use may be possible.	Low value storage use. Could be recognised in Local Plan, but B8 uses remain ancillary to farm operations here so that would not be essential.	D
Veterans UK, Thornton-Cleveleys	1.84	Located in Thornton-Cleveleys, this area comprises one large, average quality, self-contained office building occupied by Defence Business Services (DBS)	In a residential area, 0.7 km west of the A585 Amounderness Way and on a bus route. 4	1 (9,136)	Office building	Buildings from 90-2010	All average quality	Fully occupied	All freehold	Average rateable value: £105.31//sqm. Norcross Lane, the access and internal roads	Area now tightly bound by recently developed housing.	Large urban office. In full use by the public sector at present. This should be recognised in the Local Plan. If the occupier ever vacates, this older office is	C

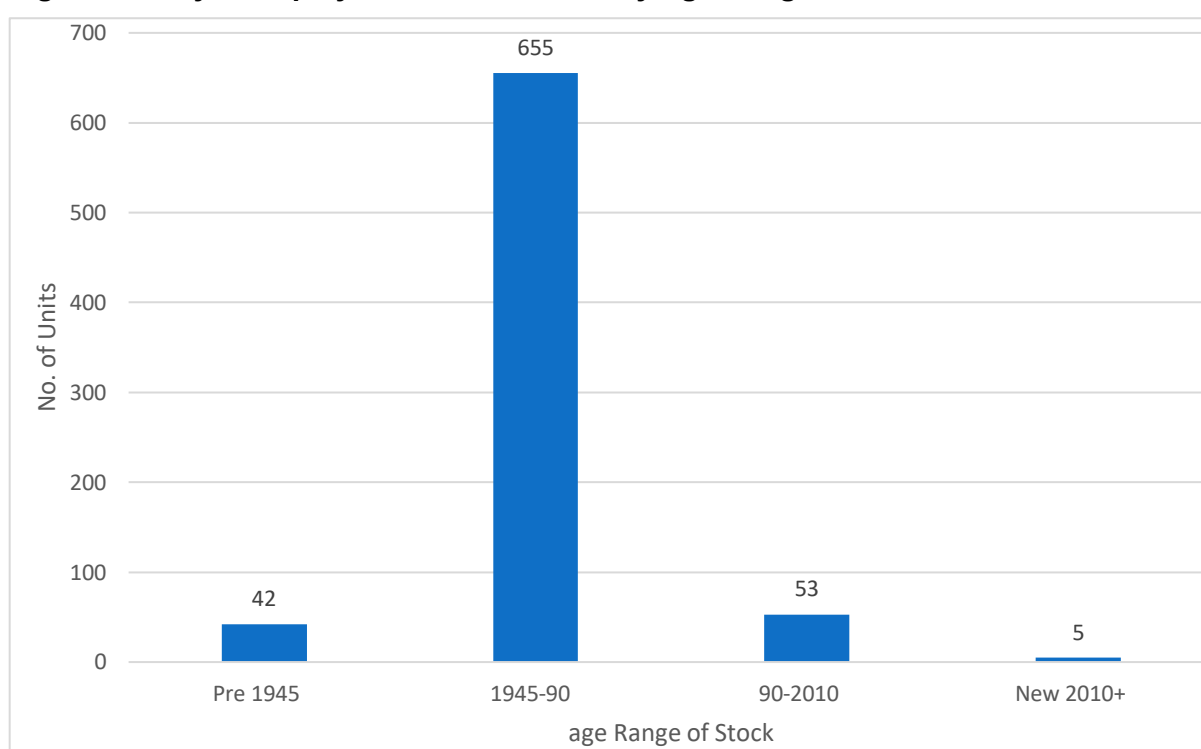
Site	Site Area, ha	Employment Area Description	Prominence and Location Summary	Premises and Area Condition						Opportunities for redevelopment/ expansion	Overall Comments	Site Grading	
				Total Number of Relevant Premises (Total Floorspace, Sqm)	Predominant Use Classes	Buildings Age	Buildings Quality	Vacancies	Tenure				Other Issues
			km from Poulton-le-Fylde railway station.							are sufficiently wide. Parking provided on premises.	unlikely to be reoccupied by the private sector. Site would thus represent a redevelopment opportunity for uses appropriate for this mostly residential area.		
Windsor Castle Works, Station Road, Poulton-le-Fylde	0.61	This employment area is located in Poulton-le-Fylde, a short distance from the town centre. Windsor Castle Works is an old two-storey building with office and industrial space. Within this building Unit 7 is in disrepair due to fire damage. Adjacent to this there is a vehicle repair premises occupied by Jim Clancy & Son and behind this more garage units can be found.	In a residential area, 0.7 km from the A588, on a bus route and 0.6 km from Poulton-le-Fylde railway station.	9 (2,287)	5 (56 percent) general industrial uses, 3 warehouses and one office. Units are of 22-142 sqm each, plus two larger units of 608 sqm and 1,192 sqm each.	Historic units, mostly pre-1945.	Mostly average quality plus one fire damaged unit.	It is assumed the damaged unit is vacant, other space is occupied.	All leasehold	Average rateable value: £46.26/sqm. Accessed through residential roads, narrowed by on-road parking. Internal roads are narrow and congested by parking from the vehicle repair use.	Damaged unit offers a refurbishment/redevelopment opportunity. Otherwise, the area is densely developed and tightly bound by other uses.	Small, densely developed employment area. Mostly in full use. This should be recognised in the Local Plan.	D
Ripon Hall Farm, Catterall Lane, Catterall	0.53	Located off the A6, this small industrial estate is found on the edge of the Catterall settlement. The estate comprises three industrial premises alongside a gym.	In a rural area, off the A6 on a bus route.	3 (488)	All in general industrial use, plus a gym. Units are 58-358 sqm each.	1990-2010	All average quality	All occupied.	All leasehold	Average rateable value: £38.59/sqm. Reasonable access off the A6.	Existing site is in full use.	Small, modern employment area. In full use. This should be recognised in the Local Plan.	D
Total	131.34			755 (340,457)									

Source: BE Group, 2023

7.91 Across the 33 areas, only one property, a fire damaged unit in Windsor Castle Works, Station Road, Poulton-le-Fylde showed evidence of dereliction. All the Areas are over 90 percent occupied, at least in terms of openly marketed premises, and most are fully occupied.

7.92 As Figure 60 shows, 655 of the 755 total units, or 86.8 percent were developed over 1945-90. Wyre contains comparatively few more modern premises, developed since 1990. Only 42 more historic premises, which can be dated to pre-1945 are noted, mostly historic mills and farm conversions, located in rural areas.

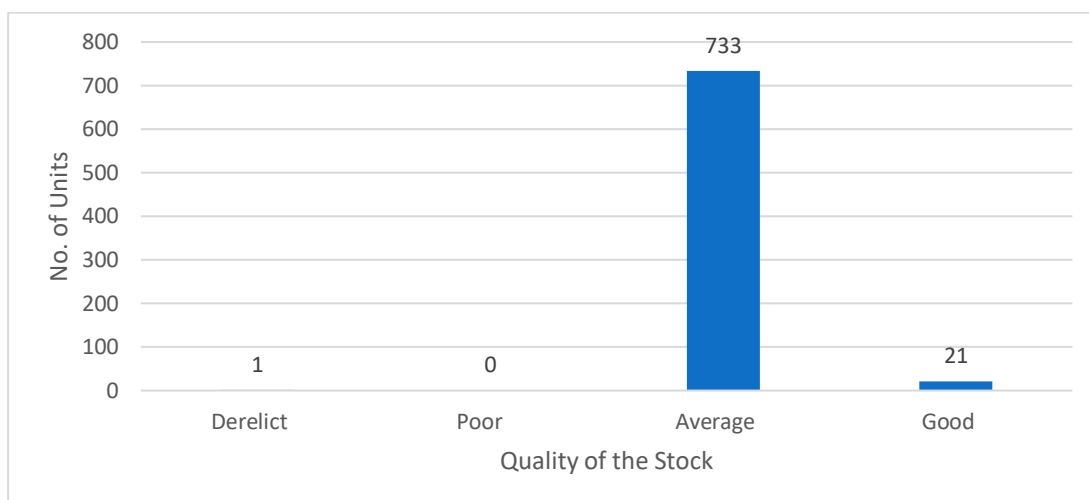
Figure 60 - Wyre Employment Area Stock – By Age Range



Source: BE Group, 2023

7.93 In terms of quality, as Figure 61 shows, all but 21 of the units were classed as average. Wyre has no notably poor graded stock and, as mentioned, only one clearly derelict property. However, the only source of high grade properties is the comparatively small Nateby Technology Park, Nateby which mostly offers 17 smaller office suites.

Figure 61 - Wyre Employment Area Stock – By Quality Range



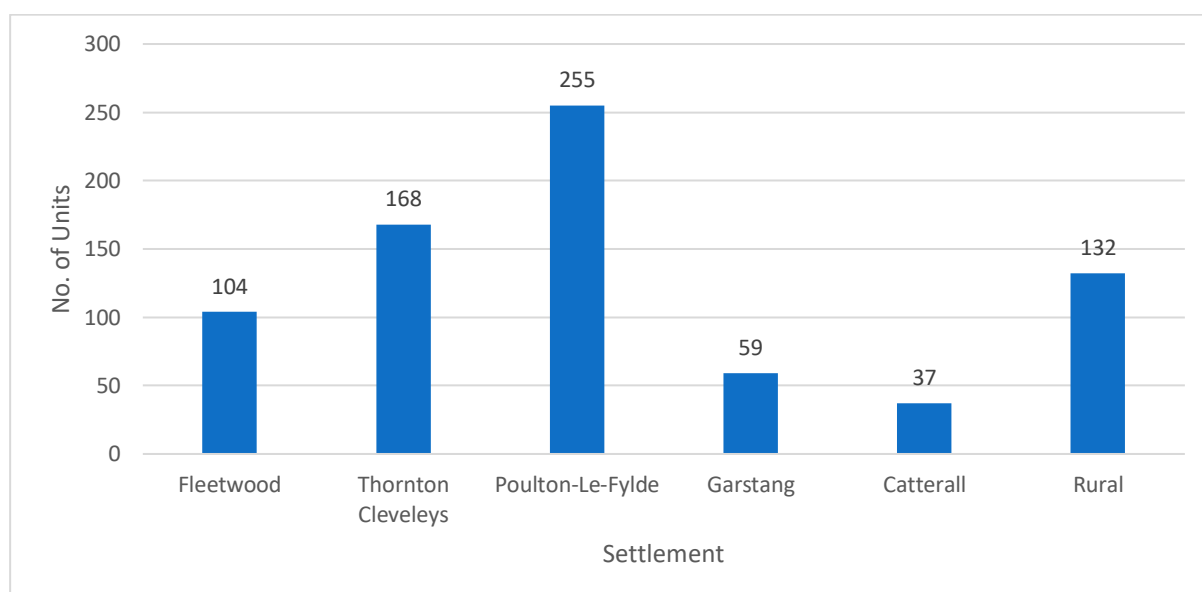
Source: BE Group, 2023

7.94 Thus, Wyre has no significant issue with older, low grade and/or extensively vacant premises. However, conversely it has few modern or higher grade premises which could be marketed to the wider sub-regional and regional economy. This point could be extended to the Hillhouse Enterprise Zone, discussed above, where the offer to inward investors is based on available land, suited for specialist uses, rather than premises.

7.95 As with Blackpool and Fylde, Wyre’s premises is very well occupied and Wyre Borough, does not have any problems with surplus premises. If there are issues with the accommodation it is issues of undersupply of types and tenures of property, rather than oversupplies.

7.96 Figure 62 splits the number of units by settlement area. It shows that a third of the stock, 255 units, is located in Poulton-Le-Fylde. Again, this reflects the importance of Poulton Industrial Estate, Poulton-le-Fylde, as the largest single source of mostly industrial and warehouse premises in Wyre. This location is somewhat distant from the core area of market interest, the M55 Corridor but enjoys reasonable linkages to Junction 3, M55 via the A585 as well as sitting on the edge of the main settlement areas of Wyre Borough, extending from Fleetwood down into Blackpool.

Figure 62 – Wyre Employment Area Stock – Number of Units by Settlement



Source: BE Group, 2023

- 7.97 Thornton Cleveleys are home to 168 units, 22.3 percent of the total. Again, this area is distinct from the M55 but as reasonable A-road links to it and benefits from a sizeable surrounding population. The local property offer here is supported by Hillhouse which is increasingly accommodating a range of local businesses alongside meeting strategic requirements, mostly for energy generation infrastructure.
- 7.98 Rural Wyre, like rural Fylde (and the markets for these two sub areas will overlap) is well served by a diverse offer of local industrial estates, accommodating 132 units (17.5 percent). Some of these rural estates are isolated, but most are within 2km of the Borough’s main A Roads and include some reasonable quality mill and farm conversions.
- 7.99 The offer in the main A6 settlements of Garstang and Catterall, another focus for market interest, is modest compared to other areas, although the A6 Corridor is supported by other schemes in the rural area. There are several growth sites along the A6, identified in the employment land supply, which could generate further employment opportunities here although most lack a clear ‘way forward’ to delivery at this time. Other options located outside of Wyre borough, to the south around Broughton in Preston and, to the north around Lancaster University are possible, but not confirmed at this time.

7.100 At Fleetwood, significant provision of E(g)/B-Class uses at the Port remains unlikely, increasing the importance of Copse Road, Fleetwood as the main local source of employment premises.

7.101 Table 68 shows a split of the 755 identified units by relevant Use Class. This shows that, in all sub-areas, B2 stock dominates followed by B8 storage and distribution uses. Offices have a negligible role in most areas, except for a couple of rural schemes and several multi-occupancy buildings at Poulton Industrial Estate, Poulton-le-Fylde. These mostly offer suites of sub-100 sqm, meaning that Wyre largely lacks larger offices although stakeholders do not indicate that these are urgently sought by the market.

7.102 Wyre has a modest offer of 82 light industrial units, 10.9 percent of the total, although this offer is more evenly spread around the Borough than is true in Fylde Borough. As noted, most active private sector development schemes across the Fylde Coast, are to deliver light industrial and storage space.

Table 68 - Wyre Employment Area Stock – By Use Class

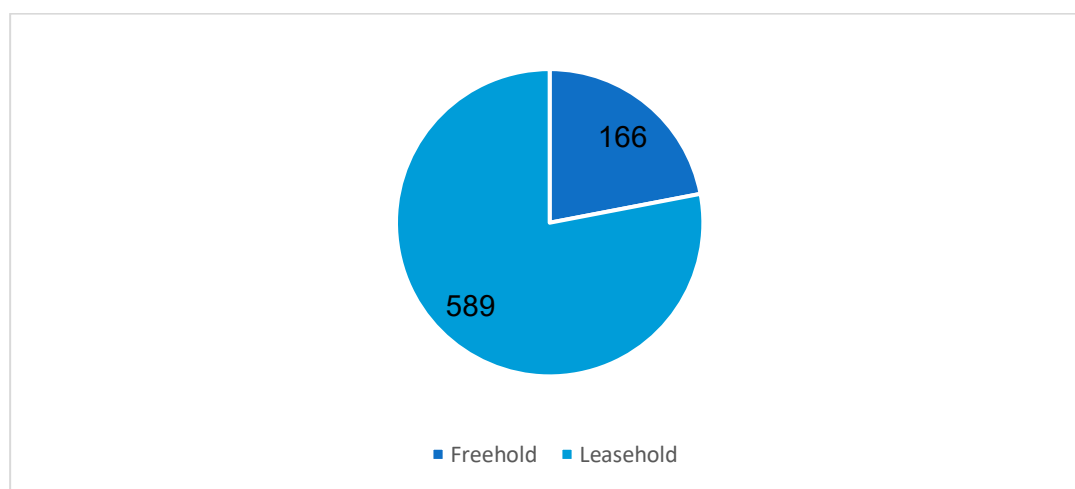
Settlement	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8
Fleetwood	4	-	10	57	33
Thornton Cleveleys	10	-	43	69	46
Poulton-Le-Fylde	35	-	10	125	85
Garstang	5	-	-	35	22
Catterall	7	-	6	15	6
Rural	26	-	13	43	50
Total (Percent)	87 (11.5)	-	82 (10.9)	344 (45.6)	242 (32.1)

Source: BE Group, 2023

7.103 Most industrial and warehouse space in Wyre Borough, comprises units of less than 600 sqm each. Larger units largely comprise bespoke facilities for the established large businesses of the Borough rather than generic properties which can easily be taken up by other firms. Thus, as is the case in Blackpool and Fylde there seems to be a supply gap for larger units which might allow established firms to expand locally and attract inward investors.

7.104 Figure 63 splits the stock by tenure showing that, out of 755 units, 78.0 percent were leasehold. There is a small, but not negligible freehold offer in the main industrial estate of Thornton Cleveleys and Poulton-Le-Fylde, which is proportionately at least larger than that of Blackpool and Fylde Borough. However, as is true elsewhere, Wyre still lacks an offer of smaller freehold properties which firms could seek to acquire. Stakeholders regularly identify a shortage of freehold options, of all Use Classes, against requirements from businesses seeking stock for owner occupation.

Figure 63 - Wyre Employment Area Stock – By Tenure



Source: BE Group, 2023

7.105 Infill opportunities in the 33 Employment Areas mostly comprise very small areas of unused land, frequently in rural industrial estates. Most undeveloped land is in use for open storage and HGV parking and so not readily available. Given the high occupancy rates and reasonable quality of most stock, no large scale redevelopment opportunities have been identified.

7.106 At Riverside Industrial Park, Catterall Collinson is seeking growth, with various options put forward, north and south of the existing plant. This growth would support both the expansion of Collinson and provide some space for other businesses. However, there are constraints to expansion in all directions which mean that expansion here is likely to be a slow and difficult process.

7.107 Apart from the two locations identified as not relevant, all the Employment Areas received a grade of C-D. It is thus recommended that these 33 areas to be identified and protected for E(g)/B-Class uses in the Local Plan, as areas as a whole, even if enhanced permitted development rights make it harder to protect individual properties

from changes of use. Areas in Wyre Borough are graded C-D meaning they are primarily aimed at meeting local needs, with Hillhouse being the likely focus for inward investment in Wyre Borough, moving forward.

SUMMARY

Employment Land Supply

- 7.108 In the case of Blackpool, this Study has examined the 13 identified Employment Areas of Blackpool Borough and identified opportunities for redevelopment and expansion, exceeding 0.25 ha each, which could provide brownfield employment development land for the Borough. Excluding small plots, a supply of 17.94 ha is identified in seven sites, referenced BB1-BB7.
- 7.109 Excluding land which is developed or not available for development suggests a more realistic figure of **12.96 ha** in five sites. Of the remaining land, 11.20 ha or 86 percent is focused within the Blackpool Airport Enterprise Zone in the south of the Borough.
- 7.110 Across all the remaining sites, development plans are for local scale industrial, and warehouse uses and primarily light industrial units of less than 500 sqm each. Only at the Eastern Gateway Site, Blackpool Airport Enterprise Zone are larger B2/B8 units of 1,394-6,968 sqm each proposed. Overall, the remaining sites could accommodate 47,178 sqm of floorspace.
- 7.111 No office uses are proposed, or likely, on any of the plots suggesting that future office requirements will need to be met in Central Blackpool and on immediately adjacent sites in Fylde Borough. In this regard, development of the Knowledge Quarter scheme at Blackpool Airport Enterprise Zone would deliver up to 15 office or data centre properties totalling 70,355 sqm (gross) fronting the A5230 Squires Gate Lane and thus well able to support the Blackpool market.
- 7.112 Fylde Borough's baseline employment land supply comprises 56.35 ha, in 11 sites, as of Fylde Council's latest Business and Industrial Land Schedule (March 2023 – 'Table G: Take up rates on Employment Land (hectares) in Fylde, April 2011 to March 2023', Pages 15-6). It excludes the strategic and secure land at BAE Warton.

- 7.113 An assessment of this supply, excluding land unlikely to be brought forward, proposed for alternative uses or held for specific occupiers suggests a more realistic figure of **56.61 ha** in ten sites. The deducted site is FY8 Naze Lane, Freckleton (2.40 ha), a very isolated backland, rural site which again has been undeveloped for some time. If not required by its owner, an adjacent business, it is unlikely to be of interest to other firms.
- 7.114 It also reflects an analysis of what remains available at Whitehills Business Park, following recent development. Conversely, discussions with the agents and owners of FY11 Mill Farm Sports Village, Fleetwood Road, Wesham suggest a larger supply of 4.20 ha is available here and being marketed for E(g)/B-Class uses, in five plots.
- 7.115 As with Blackpool it is expected that most development will be for industrial and warehouse uses, reflecting wider demand. However, there are opportunities for office development in the supply. Most notably these include FY5 Blackpool Airport Enterprise Zone, Squires Gate (14.50 ha) where masterplan proposals are for a Knowledge Quarter comprising some 15, 2-3 storey offices, plus a data centre, of 1,881- 11,688 sqm each or 70,355 sqm of gross floorspace. If successfully brought forward it would accommodate both a lot of local office sector growth and support inward investment.
- 7.116 At FY10 Whyndyke Garden Village, Preston New Road, Whitehills (20 ha) Agents for the site report that owners are in the process of negotiating a deal with a developer who will bring forward the site under the existing B2/B8 consent. However, that developer has a reported interest in provision of offices and light industrial uses here. Although that has yet to be confirmed. Alternatively, this site could provide larger B2/B8 options with 120,000 sqm consented.
- 7.117 In Wyre, the Council's 31st March 2023 Employment Land Monitoring identified 53 employment sites, including Local Plan allocations and unimplemented consents. Excluding sites of less than 0.25 ha in size or offering less than 500 sqm of floorspace, completed schemes or developments for the exclusive use of a specific business, the supply reduces to 13 sites and 35.82 ha. Two other sites are safeguarded for E(g), B2, B8 uses in the Wyre Local Plan (2011-2031) (2023) and were also reviewed here to consider their suitability to become future employment land allocations.
- 7.118 An assessment of this supply, excluding land unlikely to be brought forward, proposed for alternative uses, or held for specific occupiers suggests a more realistic figure of **35.08 ha** in 11 sites. This reflects adjustments to the supply at WY1 Fleetwood Dock and

Marina, Fleetwood and WY2 Hillhouse Technology Enterprise Zone, Thornton, following consultations with landowners, and their agents. Also, the removal of WY6 Carrfield Works, Park Lane, Preesall Hill as not being available to meet wider needs and adjustments to the remaining consents being reviewed.

- 7.119 In terms of the two Safeguarded Sites, WY14 Port of Fleetwood, Fleetwood (7.60 ha) is unlikely to be developed for port related uses. General industrial and warehousing uses may be possible here but would not be deliverable without significant public funding to address the site constraints. Attempts to secure such funding have not been successful to date. Unless a clear 'way forward' can be identified to secure development funds, it is not recommended that this parcel be allocated in the next Local Plan for employment, or other uses.
- 7.120 At Safeguarded site WY15 Brockholes Industrial Estate Extension, Catterall (32.51 ha) piecemeal development is occurring on the edge of Brockholes Industrial Estate to meet local needs and allow growth. There is no market or developer interest in a more comprehensive development here, particularly given the site's constraints and uncertainties about how a large scheme could be accessed. WY15, in its entirety, does not appear to be a deliverable site and it is not recommended the parcel be allocated for employment uses. Small scale growth of Brockholes Industrial Estate to meet local business needs, onto deliverable plots, should be supported, however.
- 7.121 Site WY4 South of Goose Lane, Catterall (1.00 ha) has secured consent for a mixed light industrial/warehouse scheme of smaller units. However, the site owner is now seeking a revised scheme which, if consented, would include restaurant/drive-thru uses which would reduce the net area of land and premises in E(g)/B-Class employment use.
- 7.122 Additionally, three sites – WY7 Land West of Great Eccleston (1.00 ha), WY8 Forton Extension, Forton (1.00 ha) and WY5 Land West of the A6, Garstang (4.68 ha) – are now consented for mostly residential schemes with ancillary sites set aside for E(g)/B-Class uses. These sites have not attracted viable market interest to date, although this may reflect the fact that infrastructure and site access has yet to be provided to any plot. Discussions with the housebuilders, and their agents, suggest that the respective housing schemes will open up and provide infrastructure for the employment land. It is likely that once the sites are opened up, market interest will improve, particularly at key locations off the A6. However, there remains a risk that the local business interest these sites will likely attract won't generate sufficient value to allow a viable development

and/or that the applicants will seek alternative, higher value, uses here, reflecting what has occurred across the wider locations.

- 7.123 All these plots would need to be subject to viability testing before they were included in the new Local Plan. However, if it was assumed that there could be pressure to release all three of these sites, plus WY4 South of Goose Lane, Catterall could ultimately be lost as a worst case scenario to non E(g)/B-Class uses. If that occurred, then the realistic land supply reduces to **27.40 ha** in nine sites (see Section 10.0). If the 10.96 ha at WY2 Hillhouse Technology Enterprise Zone, Thornton were excluded from the supply, given the many uncertainties at that location, the supply reduces further to 16.44 ha. However, we would argue that it is realistic to allow for some available supply at Hillhouse, given the commitment of stakeholders to delivery here and the market interest from at least local businesses, even if what is ultimately brought forward bears little resemblance to what was initially proposed in masterplanning.
- 7.124 The vast majority of land in Wyre is proposed for industrial and warehouse uses only, mostly aimed at meeting local needs for units of sub 500 sqm each, which does reflect market demand. Only at SA4 Hillhouse Technology Enterprise Zone, Thornton are multiple plots provided which could support larger business requirements plus potentially provide some office space.

Employment Areas Analysis

- 7.125 86 Employment Areas – 13 in Blackpool, 39 in Fylde and 34 in Wyre – have been assessed and graded. Five areas, four in Fylde, one in Wyre, were identified as not being primarily occupied by E(g)/B-Class uses and are not recommended for protection for such uses in emerging Local Plans. One area in Wyre fell within another, larger employment area and was also excluded. This leaves 80 areas, suitable for further consideration. Flagship locations, graded A-B which merit particular protection in Local Plans are:

Blackpool

- Devonshire Road / Mansfield Road
- North Blackpool Technology Park
- Blackpool Enterprise Zone - Blackpool Business Park / Squires Gate Estate / Sycamore Trading Estate.

Fylde

- Blackpool Airport, Squires Gate
- Whitworth Street, Wesham
- Westinghouse Springfield, Salwick
- BAE Systems, Warton
- Whitehills Park, Whitehills
- AXA/AEGON Offices, Ballam Road, Lytham
- Jubilee House, Lytham
- Mill Farm, Wesham.

7.126 All areas in Wyre achieve grades of C-D, meaning they are primarily focused on meeting local business needs rather than serving the sub-regional/regional market.

7.127 In general, most of the 80 Existing Employment Areas are well occupied, with no large areas of void premises, and of average quality and offering few opportunities for infill or redevelopment. In terms of offices, smaller offices of sub 200 sqm each, in multi-occupancy schemes, can be found in a range of locations across the Fylde Coast but larger offices which could allow business growth and be marketed to inward investors are only found in a couple of locations focused around Blackpool Airport Enterprise Zone and Whitehills. The industrial and warehouse stock mostly comprises units of less than 1,000 sqm in size, with most active development proposals in the Fylde Coast being for light industrial uses. There is thus a supply shortage of larger B2/B8 units in the sub-region, against identified demand.

7.128 Locations in the east of Fylde Borough, most notably the major employment sites of BAE and Westinghouse Springfield, will benefit from the new Junction 2, M55 which provides more direct motorway access. Previously, for BAE Warton, the most direct motorway access would have been north to Junction 3, M55 via rural roads. Motorway access for Westinghouse Springfield would have required passing through the Preston settlement area.

8.0 OBJECTIVELY ASSESSED NEEDS

INTRODUCTION

8.1 In this Section we consider the Objectively Assessed Need (OAN) for employment land and floorspace over the period from 2022-2042 for the Fylde Coast authorities of Blackpool, Fylde and Wyre. Paragraph 27 of the Planning Practice Guidance ‘Housing and Economic Needs Assessment’ notes that “*Strategic policy making authorities will need to develop an idea of future needs based on a range of data which is current and robust, such as:*

- *Sectoral and employment forecasts and projections which take account of likely changes in skills needed (labour demand)*
- *Demographically derived assessments of current and future local labour supply (labour supply techniques)*
- *Analysis based on the past take-up of employment land and property and/or future property market requirements...*”

8.2 Reflecting that Guidance, the approach that has been adopted in this study is to consider the appropriateness of two models, the Labour Demand and Past Take Up, to determine the OAN for Blackpool, Fylde and Wyre (the Fylde Coast) local authority areas. Trends and forecasts must also reflect market signals and therefore they are considered in the context of the market overview undertaken as part of this study.

8.3 **Labour Demand** relies on the econometric forecasts which use a model that projects the likely jobs growth in different industry sectors. The jobs figures are then translated to land using a formula based on a jobs to floorspace density which, in turn, can be translated into the projected land need. This scenario uses as its base the updated economic forecasts (August 2023), produced by Cambridge Econometrics for Blackpool, Fylde and Wyre. These forecasts accounted for macro-economic conditions as understood at Summer 2023 and the projected long-term impacts of issues like the Covid-19 Pandemic and inflation on the local economy. The forecast is examined in more detail in Section 3.0 while Appendix 2 provides a justification for why Cambridge Econometrics was chosen for jobs change modelling in this Study.

8.4 The above is a ‘policy off’ forecast, i.e., the outcome which, given national trends in the economy, might be expected to occur locally anyway without any intervention from public policy and programmes. However, in reality, large scale public policy initiatives will

impact on jobs growth (Labour Demand) moving forward. Accordingly, additional 'policy on' Labour Demand modelling is undertaken, providing a sensitivity test of the baseline forecasts against existing and emerging strategic policy initiatives, specifically the Enterprise Zones of Blackpool, Fylde and Wyre, combined with key regeneration projects in Central Blackpool.

- 8.5 The econometric forecasts are useful in that they analyse each industry sector and, in conjunction with other market data, the forecasts can identify where sectors may be growing or shrinking which in turn can inform land and property needs. However, they also have several limitations. They are based on national and regional trends with some local adjustments for some industry sectors, which means, at a local level, economic activity is not always accurately represented. Also, merely translating jobs to land needs will not always reflect local property trends or changing working practices, which may alter jobs densities. Therefore, sensitivity testing against factors like changes to homeworking is also undertaken.
- 8.6 **Labour Supply**, also referenced in the PPG Note, is a variation on Labour Demand that uses the same method of forecasting as the Employment based method but takes forecast changes in the working population i.e., labour supply, rather than jobs – labour demand. However, it ideally requires, as a base, the forecasts of working age population change which will specifically inform agreed projections of housing need on the Fylde Coast, to allow a link to be made between housing and employment land requirements.
- 8.7 In Section 2.0, this Study uses 2018-based population projections, from ONS, to show broad trends in population change across the Fylde Coast, to the 2040s. In principle, these projections could be used to provide a labour supply model, however, as they forecast decreases in working age population in Blackpool, Fylde and Wyre all the resulting needs figures would be negative requirements. As will be shown in this Section, this is not consistent with the outputs of the other models.
- 8.8 Accordingly, the Labour Supply Model is not used in this Study. This is not a particular concern since Labour Supply modelling only identifies employment land needs from the extra working age population, identified to 2042. It does not analyse change across the wider economy to provide complete projections of OAN.

- 8.9 **Past Take-Up** reviews the actual take-up of employment land in the three local authority areas over a period of time. The advantage of this model is that it looks at real world conditions, i.e. the growth that has actually occurred in the study area to date, and projects that growth forward. It allows for market demand and business needs in a way that calculations of jobs change cannot. The method is not wholly reliable, however, as there will be peaks and troughs and also different time periods taken can also result in different outcomes. For example, a period of sustained growth may show a high average take-up whereas looking over a recessionary period could well reflect low or even nil take-up. Additionally, the monitoring of employment land take up has become more challenging for Councils since 2020, given changes in Permitted Development Rights and the Use Classes Order, which allow more changes of use within, and from, the E(g)/B-Class uses without the need to seek planning consent. Councils are also under pressure to prioritise the monitoring of housing take up, a factor given more importance in national policy and local authority resourcing, over employment land take up.
- 8.10 The methods, and calculations, are considered in turn.

LABOUR DEMAND – BASELINE FORECAST

- 8.11 Work has been completed using forecasts provided by Cambridge Econometrics. A detailed review of the output of the forecast, in terms of jobs and GVA, over 2022-2042 is provided in Section 3.0.
- 8.12 This baseline scenario considers the quantum of employment land required to support the growth of 9,262 jobs across the Fylde Coast – 3,993 in Blackpool, 1,808 in Fylde (with the lower figure reflecting higher projected losses in manufacturing employment than elsewhere), 3,461 in Wyre – 2022-42 shown in the Cambridge Econometrics baseline forecast. The jobs changes by sector are set out in Table 18 in Section 3.0.
- 8.13 To use these figures to forecast OAN in the Fylde Coast, several adjustments must be made to allow for real world conditions. Firstly, an allowance is made for part time working in the labour force, by converting the forecasts for total employment, by sector, into forecasts for Full-Time Equivalent (FTE) jobs by sector.⁴⁵ This is achieved through

⁴⁵ An FTE job is equal to the no. of hours a full-time employee works for an organisation. It counts “hours worked” rather than the no. of employees. For example, if an organisation considers 40 hours per week as full-time and there are 4 employees who work 10 hours each per week, the hours for those employees equal 1.0 FTE.

an analysis of the proportion of full-time and part-time jobs in Blackpool, Fylde and Wyre as of 2022, using Business Register and Employment Survey (BRES) employment data. The number of full time employees in each industry sector is divided from the total number of combined full/part time employees to identify the proportion of jobs in each sector which are full time only. This proportion can then be applied to the forecast change, for each sector, to identify FTE jobs numbers.

- 8.14 Tables 69 to 71 show the conversion to FTE jobs for the three Fylde Coast Local authorities and shows that the Fylde Coast is forecast to gain 7,031 FTE jobs to 2042, 3,230 in Blackpool, 1,072 in Fylde and 2,729 in Wyre.⁴⁶

⁴⁶ Numbers in tables may not sum due to rounding

Table 69 – Conversion to FTE Jobs and Allowance for Homeworking – Blackpool

Cambridge Forecast Change - Employment by Industry	Total Change 2022-2042	Percentage Applied (To allow for Part Time Labour)	FTE Jobs Change 2022-2042	FTE Jobs, with a 20.2 percent Reduction in Office Jobs, allowing for Homeworking (Affected Sectors in Bold/Highlighted)
Agriculture, forestry & fishing	14	100	14	11
Mining & quarrying	0	100	0	0
Food, drink & tobacco	-46	95	-44	-44
Textiles etc	-19	100	-19	-19
Wood & paper	-1	94	-1	-1
Printing & recording	-25	77	-19	-19
Coke & petroleum	0	100	0	0
Chemicals	-7	93	-7	-7
Pharmaceuticals	0	100	0	0
Non-metallic mineral products	-69	100	-69	-69
Metals & metal products	-128	99	-127	-127
Electronics	-13	100	-13	-13
Electrical equipment	1	94	1	1
Machinery	-56	98	-55	-55
Motor vehicles	-39	98	-38	-38
Other transport equipment	-21	98	-21	-21
Other manufacturing & repair	3	92	3	3
Electricity & gas	-4	100	-4	-3
Water, sewerage & waste	-1	100	-1	-1
Construction	190	94	179	143
Motor vehicles trade	155	91	141	141
Wholesale trade	30	92	28	28
Retail trade	162	70	113	113
Land transport	145	94	136	136
Water transport	1	100	1	1
Air transport	-1	93	-1	-1
Warehousing & postal	5	91	5	5
Accommodation	144	76	109	109
Food & beverage services	334	67	224	224
Media	5	91	5	4
IT services	418	88	368	294
Financial & insurance	-27	91	-25	-20
Real estate	55	90	50	40
Legal & accounting	50	91	46	36
Head offices & management consultancies	12	92	11	9
Architectural & engineering services	20	93	19	15
Other professional services	50	85	43	34
Business support services	257	85	218	174
Public Administration & Defence	355	86	305	244
Education	357	81	289	231
Health	48	80	38	31
Residential & social	1451	82	1,190	1,190
Arts	20	74	15	15
Recreational services	188	75	141	141
Other services	-21	83	-17	-17
Unallocated	0	100	0	0
Total	3,993	-	3,230	2,916

Source: Cambridge Econometrics, 2023 and ONS, 2023

Table 70 – Conversion to FTE Jobs – Fylde

Cambridge Forecast Change - Employment by Industry	Total Change 2022-2042	Percentage Applied (To allow for Part Time Labour)	FTE Jobs Change 2022-2042	FTE Jobs, with a 31.8 percent Reduction in Office Jobs, allowing for Homeworking (Affected Sectors in Bold/Highlighted)
Agriculture, forestry & fishing	13	82	11	7
Mining & quarrying	0	100	0	0
Food, drink & tobacco	-81	97	-79	-79
Textiles etc	-26	97	-25	-25
Wood & paper	-1	98	-1	-1
Printing & recording	-7	77	-5	-5
Coke & petroleum	0	100	0	0
Chemicals	-35	97	-34	-34
Pharmaceuticals	-2	97	-2	-2
Non-metallic mineral products	-22	98	-22	-22
Metals & metal products	-309	98	-303	-303
Electronics	-2	100	-2	-2
Electrical equipment	0	100	0	0
Machinery	-8	93	-7	-7
Motor vehicles	-79	98	-77	-77
Other transport equipment	-2,064	97	-2,002	-2,002
Other manufacturing & repair	4	93	4	4
Electricity & gas	-1	100	-1	-1
Water, sewerage & waste	-2	100	-2	-1
Construction	531	89	473	322
Motor vehicles trade	36	94	34	34
Wholesale trade	45	91	41	41
Retail trade	88	73	64	64
Land transport	172	89	153	153
Water transport	1	100	1	1
Air transport	-10	73	-7	-7
Warehousing & postal	3	96	3	3
Accommodation	109	75	82	82
Food & beverage services	679	67	455	455
Media	34	93	32	22
IT services	403	89	359	245
Financial & insurance	-25	93	-23	-16
Real estate	39	81	32	22
Legal & accounting	266	98	261	178
Head offices & management consultancies	44	92	40	28
Architectural & engineering services	28	94	26	18
Other professional services	134	92	123	84
Business support services	185	87	161	110
Public Administration & Defence	56	86	48	33
Education	597	76	454	309
Health	6	85	5	3
Residential & social	846	81	685	685
Arts	61	68	41	41
Recreational services	147	77	113	113
Other services	-42	83	-35	-35
Unallocated	0	83	0	0
Total	1,808	-	1,072	437

Source: Cambridge Econometrics, 2023 and ONS, 2023

Table 71 - Conversion to FTE Jobs – Wyre

Cambridge Forecast Change - Employment by Industry	Total Change 2022-2042	Percentage Applied (To allow for Part Time Labour)	FTE Jobs Change 2022-2042	FTE Jobs, with a 26.1 percent Reduction in Office Jobs, allowing for Homeworking (Affected Sectors in Bold/Highlighted)
Agriculture, forestry & fishing	12	81	10	7
Mining & quarrying	0	100	0	0
Food, drink & tobacco	-43	93	-40	-40
Textiles etc	-64	73	-47	-47
Wood & paper	-1	94	-1	-1
Printing & recording	-7	96	-7	-7
Coke & petroleum	0	100	0	0
Chemicals	-120	98	-118	-118
Pharmaceuticals	-2	100	-2	-2
Non-metallic mineral products	-32	96	-31	-31
Metals & metal products	-93	97	-90	-90
Electronics	-18	100	-18	-18
Electrical equipment	1	94	1	1
Machinery	-15	93	-14	-14
Motor vehicles	-32	100	-32	-32
Other transport equipment	-4	91	-4	-4
Other manufacturing & repair	2	94	2	2
Electricity & gas	-22	97	-21	-16
Water, sewerage & waste	-3	100	-3	-2
Construction	471	95	447	331
Motor vehicles trade	57	90	51	51
Wholesale trade	85	92	78	78
Retail trade	306	70	214	214
Land transport	73	94	69	69
Water transport	2	90	2	2
Air transport	0	100	0	0
Warehousing & postal	2	91	2	2
Accommodation	117	73	85	85
Food & beverage services	217	67	145	145
Media	11	89	10	7
IT services	302	90	272	201
Financial & insurance	-6	91	-5	-4
Real estate	83	81	67	50
Legal & accounting	79	90	71	53
Head offices & management consultancies	8	91	7	5
Architectural & engineering services	90	92	83	61
Other professional services	45	90	41	30
Business support services	152	84	128	94
Public Administration & Defence	11	89	10	7
Education	408	75	306	226
Health	18	83	15	11
Residential & social	1110	77	855	855
Arts	43	69	30	30
Recreational services	243	74	180	180
Other services	-22	85	-19	-19
Unallocated	0	100	0	0
Total	3,461		2,729	2,354

Source: Cambridge Econometrics, 2023 and ONS, 2023

- 8.15 The second consideration is homeworking, which affects the number of new jobs which need to be accommodated in commercial premises, and therefore need employment land. The latest data on homeworking, by local authority area, is derived from the 2021 Census and as shown in Section 2.0, this identifies homeworking rates of 20.2 percent in Blackpool, 31.8 percent in Fylde and 26.1 percent in Wyre. The 2021 Census does not split homeworking rates by business sector, but it can be assumed that, after the lockdowns associated with the Covid-19 Pandemic have ended at least, homeworking will primarily be found in office-based sectors.
- 8.16 Reducing the relevant, office-based, sectors by the above proportions, to exclude jobs which would be mostly home based, reduces the FTE employment growth needing commercial premises over 2022-2042 to 5,707 jobs across the Fylde Coast, comprising 2,916 jobs in Blackpool, 437 jobs in Fylde and 2,354 jobs in Wyre. The affected sectors are highlighted in bold in Tables 69 to 71 above.
- 8.17 As noted in Section 3.0, 2021 Census data was collected at a time when the UK was still experiencing lockdowns associated with the Covid-19 Pandemic, it may therefore exaggerate present homeworking rates and homeworking levels moving forward to 2042. However, it was the view of stakeholders, contacted for this study, that large scale homeworking and hybrid working continues to remain a key part of office sector working on the Fylde Coast, but stakeholders could not confirm what proportion of their staff now work mostly from home and what proportion work on a hybrid basis (i.e. partly from home, partly from the office). Hybrid workers will still require some office accommodation.
- 8.18 Given the uncertainties around present and future homeworking rates, and the desire of the Councils to encourage as much employment as possible back into offices, particularly town centre offices (expressed in a range of local policies, for example Policy CS3: Economic Development and Employment of the Blackpool Local Plan Part 1 (2016)), two scenarios are shown below which illustrate premises and land needs, with or without a deduction for homeworking.
- 8.19 Finally, in terms of employment land requirements, only certain sectors will translate jobs into a requirement for employment land. The model assesses what percentage of jobs in each sector translates to floorspace. For example, in transport and storage a percentage of jobs will be warehouse based, whilst the remainder will be drivers not operating on site. Thus, this model is likely to be affected by a number of key factors,

namely:

- **The future mix of activities in respect of office, manufacturing and warehousing employment within different sectors.** It is not possible to predict the impact of evolving technical change over the period to 2042, and we have therefore assumed that this mix will not change over the period
- **The percentage of employees in each sector that will translate to floorspace.** The proportion of people in each industry sector that occupy E(g), B2 or B8 space conforms to those ratios used in other studies and accepted in comparable locations and are sourced from the South East Regional Planning Conference's 'The Use of Business Space', which remains the most up to date study on such matters and is used across England
- **The average space each employee occupies – the employment density.** We have assumed no variation in the density rates through to 2042 and have used those densities identified in the Homes and Communities Agency (now Homes England) 2015 published Employment Densities Guide 3rd Edition, with allowances made for Net or Gross Internal Areas. With changing work practices, the densities will vary, but in the absence of more locally sourced or up-to-date data (including post-pandemic workplace practices) this industry accepted data is used.
- **The average development floorspace per hectare for office, manufacturing and warehousing activities.** We have applied the uniform amount of 4,000 sqm per hectare for the OAN calculations for Blackpool, Fylde and Wyre. This is a standard density for development in business park and industrial estate settings where the bulk of new development is likely to occur.

8.20 These assumptions are summarised in Table 72.

Table 72 - Model Assumptions

Industry Sector	Employees		
	Percentage of Staff Occupying E(g), B2, B8 Floorspace %	Floorspace Occupied per Person (sqm)	Other Comments
Agriculture/Mining	5	14	The 5 percent will comprise managerial, admin, thus E(g)(i) office space. This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area of buildings is on average 20 percent higher than the net internal area.
Manufacturing	100	49	Reflecting present development trends in the Fylde Coast which are seeing a majority of employment sites developed for E(g)(iii) light industrial units (as discussed in Section 7.0), an average of 49 sqm gross external area per employee is used. This assumes that the gross external area of buildings is on average 5 percent higher than the net internal area.
Utilities	26	14	The 26 percent will comprise managerial, admin, thus E(g)(i) office space. This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area is on average 20 percent higher than the net internal area.
Construction	26	14	The 26 percent will comprise managerial, admin, thus E(g)(i) office space. This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area is on average 20 percent higher than the net internal area.
Transport and Distribution	48	70	Warehouses, offices. It is assumed that development on the Fylde Coast will primarily be for 'Final Mile' Distribution Centres, with an average gross external area of 70 sqm/job.
Private office sectors e.g., Financial and Legal, Professional Services	100	14	This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area of buildings is on average 20 percent higher than the net internal area.
Government and Other Services	22	14	Local Government, Public Administration for E(g)(i) offices. This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area of buildings is on average 20 percent higher than the net internal area.

Source: SERPLAN, Homes England, 2015 and BE Group, 2023

- 8.21 Using the adjustments shown in Table 72 the net job figure for each sector is calculated to reflect the proportion of jobs occupying 'E(g) or B' floorspace. That figure is then multiplied by the floorspace per person to give total floorspace for each sector.
- 8.22 Once a total floorspace is calculated, the figures are then translated to a land requirement using the ratio of 4,000 sqm per hectare. This applies to all use classes. Tables 73 to 78 show these calculations, split by Use Class. The wider calculations are provided at Appendix 8.

Fylde Coast Baseline Forecasts – With no Reduction in Employment for Homeworking

Table 73 – Blackpool Labour Demand Forecast 2022-2042 – With no Reduction in Employment for Homeworking⁴⁷

Use Class	Overall, Jobs Change (FTE)	Jobs Needing E(g)/B Class Space	Floorspace Need, Sqm	Land Need, Hectares
Offices	1,562	922	12,905	3.23
Light/General Industrial	-409	-409	-20,041	-5.01
Storage and Distribution	141	68	4,738	1.18
Other Jobs - Retail/Wholesale	282	-	-	-
Other Jobs - Accommodation	109	-	-	-
Other Jobs - Food and Beverage Services	224	-	-	-
Other Jobs - Arts and Recreation	156	-	-	-
Other Jobs - Other Services	1173	-	-	-
Total	3,230	580	-2,398	-0.60

Source: BE Group, 2023

⁴⁷ Columns may not total due to rounding

Table 74 – Fylde Labour Demand Forecast 2022-2042 – With no Reduction in Employment for Homeworking⁴⁸

Use Class	Overall, Jobs Change (FTE)	Jobs Needing E(g)/B Class Space	Floorspace Need, Sqm	Land Need, Hectares
Offices	1,999	1,245	17,434	4.36
Light/General Industrial	-2,555	-2,555	-125,195	- 31.30
Storage and Distribution	150	72	5,040	1.26
Other Jobs - Retail/Wholesale	139	-	-	-
Other Jobs - Accommodation	82	-	-	-
Other Jobs - Food and Beverage Services	455	-	-	-
Other Jobs - Arts and Recreation	154	-	-	-
Other Jobs - Other Services	650	-	-	-
Total	1,072	-1,238	-102,721	-25.68

Source: BE Group, 2023

⁴⁸ Columns may not total due to rounding

Table 75 – Wyre Labour Demand Forecast 2022-2042 – With no Reduction in Employment for Homeworking⁴⁹

Use Class	Overall, Jobs Change (FTE)	Jobs Needing E(g)/B Class Space	Floorspace Need, Sqm	Land Need, Hectares
Offices	1,438	857	12,002	3.00
Light/General Industrial	-401	-401	-19,649	- 4.91
Storage and Distribution	73	35	2,453	0.61
Other Jobs - Retail/Wholesale	343	-	-	-
Other Jobs - Accommodation	85	-	-	-
Other Jobs - Food and Beverage Services	145	-	-	-
Other Jobs - Arts and Recreation	210	-	-	-
Other Jobs - Other Services	836	-	-	-
Total	2,729	491	-5,194	-1.3

Source: BE Group, 2023

⁴⁹ Columns may not total due to rounding

Fylde Coast Baseline Forecasts – With a Reduction in Employment for Homeworking

Table 76 – Blackpool Labour Demand Forecast 2022-2042 – With a Reduction in Employment for Homeworking⁵⁰

Use Class	Overall, Jobs Change (FTE)	Jobs Needing E(g)/B Class Space	Floorspace Need, Sqm	Land Need, Hectares
Offices	1,242	734	10,276	2.57
Light/General Industrial	-409	-409	-20,041	-5.01
Storage and Distribution	141	68	4,738	1.18
Other Jobs - Retail/Wholesale	282	-	-	-
Other Jobs - Accommodation	109	-	-	-
Other Jobs - Food and Beverage Services	224	-	-	-
Other Jobs - Arts and Recreation	156	-	-	-
Other Jobs - Other Services	1173	-	-	-
Total	2,916	393	-5,027	-1.26

Source: BE Group, 2023

⁵⁰ Columns may not total due to rounding

Table 77 – Fylde Labour Demand Forecast 2022-2042 – With a Reduction in Employment for Homeworking⁵¹

Use Class	Overall, Jobs Change (FTE)	Jobs Needing E(g)/B Class Space	Floorspace Need, Sqm	Land Need, Hectares
Offices	1,363	850	11,906	2.98
Light/General Industrial	-2,555	-2,555	-125,195	-31.3
Storage and Distribution	150	72	5,040	1.26
Other Jobs - Retail/Wholesale	139	-	-	-
Other Jobs - Accommodation	82	-	-	-
Other Jobs - Food and Beverage Services	455	-	-	-
Other Jobs - Arts and Recreation	154	-	-	-
Other Jobs - Other Services	650	-	-	-
Total	438	-1633	-108,249	-27.06

Source: BE Group, 2023

⁵¹ Columns may not total due to rounding

Table 78 – Wyre Labour Demand Forecast 2022-2042 – With a Reduction in Employment for Homeworking⁵²

Use Class	Overall, Jobs Change (FTE)	Jobs Needing E(g)/B Class Space	Floorspace Need, Sqm	Land Need, Hectares
Offices	1,061	632	8,854	2.21
Light/General Industrial	-401	-401	- 19,649	- 4.91
Storage and Distribution	73	35	2,453	0.61
Other Jobs - Retail/Wholesale	343	-	-	-
Other Jobs - Accommodation	85	-	-	-
Other Jobs - Food and Beverage Services	145	-	-	-
Other Jobs - Arts and Recreation	210	-	-	-
Other Jobs - Other Services	836	-	-	-
Total	2,354	266	-8,342	-2.09

Source: BE Group, 2023

8.23 When the land needs from the office, industrial and warehouse sectors are combined, the following OAN can be identified, with or without a deduction for homeworking:

Blackpool

- Without a Reduction for Homeworking – 580 extra jobs in relevant sectors (3,230 extra jobs across all sectors), equating to a negative requirement of -2,398 sqm of floorspace and -0.60 ha of land, i.e. the local authority area needs less premises/land than it presently has.
- With a Reduction for Homeworking – 393 extra jobs in relevant sectors (2,916 extra jobs across all sectors), equating to a negative requirement of -5,027 sqm of floorspace and -1.26 ha of land, i.e. the local authority area needs less premises/land than it presently has.

⁵² Columns may not total due to rounding.

Fylde

- Without a Reduction for Homeworking – -1,238 fewer jobs in relevant sectors (1,072 extra jobs across all sectors), equating to a negative requirement of -102,721 sqm of floorspace and -25.68 ha of land, i.e. the local authority area needs less premises/land than it presently has.
- With a Reduction for Homeworking – -1,633 fewer jobs in relevant sectors (438 extra jobs across all sectors), equating to a negative requirement of -108,249 sqm of floorspace and -27.06 ha of land, i.e. the local authority area needs less premises/land than it presently has.

Wyre

- Without a Reduction for Homeworking – 491 extra jobs in relevant sectors (2,729 extra jobs across all sectors), equating to a negative requirement of -5,194 sqm of floorspace and -1.3 ha of land, i.e. the local authority area needs less premises/land than it presently has.
- With a Reduction for Homeworking – 266 extra jobs in relevant sectors (2,354 extra jobs across all sectors), equating to a negative requirement of -8,342 sqm of floorspace and -2.09 ha of land, i.e. the local authority area needs less premises/land than it presently has.

8.24 However, the final outputs are severely limited by the large declines in manufacturing employment predicted in the model. This is most significant in Fylde Borough, but is evident in Blackpool and Wyre as well, and leads to the negative requirements for premises and land under all scenarios, i.e. the local authority area needs less premises/land than it presently has.

8.25 The loss of manufacturing jobs reflects the assumption that technological change will lead to increased productivity per worker and reduce the number of production staff each business needs to employ. Over the long term, such a decline is likely, however, there is no reason to assume that a decline in employment will lead to a greatly reduced, or negative, need for employment land. Experience suggests that even where businesses are contracting, in labour terms, they will continue to hold onto sites in anticipation of future improvement and change. Also, where jobs are being lost to automation, those new automated processes will still require premises and land on which to operate. Certainly, the larger industrial businesses, contacted for this Study, are actively seeking to expand their physical facilities as they grow their production capacity, even if the jobs

density on that land is reducing.

- 8.26 Some of these points can also be applied to the storage and distribution sector as well where physically identical logistics facilities may be sought by logistics companies which have very different jobs densities. For example, a warehouse processing Fast Moving Consumer Goods (FMCG) which are picked on an intensive basis by staff and where stock turns over on a regular basis will have a dramatically different employment density to an identical warehouse where spare parts for machinery or transport equipment are required to be stored for long periods of time, or a facility with high levels of automation. However, an element of jobs growth is still projected in this sector, for Blackpool, Fylde and Wyre, which needs to be accounted for.
- 8.27 Thus, there is a case for excluding the industrial change in this scenario and looking at the office and warehouse forecasts, where growth is projected. The revised needs are set out below, using just the figures for office and storage and distribution change, set out in Tables 73 to 78 above:

Blackpool

- Without a Reduction for Homeworking – 989 extra jobs in relevant sectors equating to a need of 17,643 sqm of floorspace and 4.41 ha of land.
- With a Reduction for Homeworking – 802 extra jobs in relevant sectors, equating to a need of 15,014 sqm of floorspace and 3.75 ha of land.

Fylde

- Without a Reduction for Homeworking – 1,317 extra jobs in relevant sectors, equating to a need of 22,474 sqm of floorspace and 5.62 ha of land
- With a Reduction for Homeworking – 922 extra jobs in relevant sectors, equating to a need of 16,946 sqm of floorspace and 4.24 ha of land.

Wyre

- Without a Reduction for Homeworking – 892 extra jobs in relevant sectors, equating to a need of 14,455 sqm of floorspace and 3.61 ha of land
- With a Reduction for Homeworking – 667 extra jobs in relevant sectors, equating to a need of 11,307 sqm of floorspace and 2.82 ha of land.

LABOUR DEMAND – POLICY-ON FORECAST

- 8.28 This section provides a sensitivity test of the baseline forecasts against existing and emerging strategic policy initiatives, specifically the Enterprise Zones present in Blackpool, Fylde and Wyre, combined with key regeneration projects in Central Blackpool.

Blackpool/Fylde – Blackpool Airport Enterprise Zone and Central Blackpool Regeneration

- 8.29 Blackpool Airport Enterprise Zone is split between the Boroughs of Fylde (which accommodates 55 percent of the Enterprise Zone) and Blackpool. Market activity at the Enterprise Zone is discussed further in Sections 4.0 and 5.0 and detailed development plans at the Zone, on a plot-by-plot basis are discussed in Section 7.0.
- 8.30 Development in the Enterprise Zone to date has been to accommodate local businesses, mostly at Blackpool Business Park, within Blackpool Borough. The employment generated by such local development will be accounted for in the Baseline forecasts of jobs change which are analysed above. In the future, the Eastern Gateway site, discussed in Section 7.0, which also falls into Blackpool Borough, might attract some inward investment, and therefore generate some jobs not accounted for in baseline forecasts. However, market comments suggest that the bulk of take up here will also be from firms local to the Fylde Coast looking to expand in the sub-region, i.e. primarily local growth. **Thus, it is assumed that none of the projected jobs growth in the portions on the Enterprise Zone which fall into Blackpool Borough will be additional to that forecast by the Cambridge Baseline jobs projections.**
- 8.31 However, moving forward there is a prospect for strategic growth, specifically the development of the Knowledge Quarter on land presently occupied by the buildings of Blackpool Airport, which are within Fylde Borough. The proposal would be for a strategic office and technology park, competing in the regional market for ICT, professional and research and development-based businesses. This will be combined with the relocation and expansion of the Airport to the south, as a new 'Aviation Zone'. The strategic proposal is likely to generate jobs additional to the Baseline jobs forecast. It is also proposed on land owned, in part at least, by Blackpool Council, giving the public sector the capacity to drive forward development. **This project, and just this project, is therefore considered further in this Policy On model, with all resulting floorspace/land needs applied to Fylde Borough only.**

8.32 To undertake a Policy On employment forecast, linked to the Enterprise Zones, certain assumptions need to be made:

- *Development Plans* – Plans for development of the Knowledge Quarter/Aviation Zone at Blackpool Airport Enterprise Zone have been identified through discussions with stakeholders, informed by a review of the existing Blackpool Airport Enterprise Zone Masterplan (2017). These are set out at Appendix 9 in columns A-G, on a plot by plot basis, and include estimates of the floorspace to be generated from each development on a gross or net basis. Overall, the proposed new development could create 119,633 sqm of new gross E(g)/B-Class floorspace or 59,324 sqm of net floorspace
- *Identify Gross Jobs* – There are no up to date estimates of the number of jobs which could be generated in the Enterprise Zone⁵³, in masterplanning completed to date. In the absence of such data, this Study converts the floorspace to be developed into numbers of jobs using industry standard jobs density figures, relevant to the accommodation being developed (tech offices, data centre), derived from the HCA (Homes England) Jobs Density Guide 2015, consistent with the Baseline Labour Demand forecast above. The resulting jobs figures are set out in Appendix 9 column H and indicate that the Knowledge Quarter/Aviation Zone could attract 5,113 gross jobs.
- *Additionality/Displacement* – Only some of those 5,113 gross jobs will be new to Blackpool and the Fylde Coast with others coming from businesses, or individual employees, that have relocated from elsewhere in Blackpool/Fylde. Alternatively, they may be new jobs but represent local growth already allowed for in the Cambridge Baseline Forecast. In terms of the Knowledge Quarter, the offices developed are expected to accommodate a mix of business relocation from within the sub-region, combined with growth and expansion of those firms, plus inward investment from further afield. Subject to more detailed analysis, it is assumed that half of the jobs generated will be additional, with the rest displaced locally. In the Aviation Quarter, the proposed significant expansion of existing airport operations, is expected to generate jobs in specialist civilian aerospace sectors. Three quarters of

⁵³ The last figures created were for the 2018 Enterprise Zone Area Masterplan, which estimated the location could generate, some 5,000 extra jobs. This jobs estimate was based on an analysis of the development plans of the Enterprise Zone, at that time, and the floorspace which those plans would generate. That floorspace was then converted to jobs using standard jobs densities. This Policy On Model provides an updated assessment of the jobs generation potential of the Enterprise Zone, based on the latest, 2023/2024 plans for change, as identified through engagement with Blackpool Council and other stakeholders. As development plans have been refined since 2018, the jobs outputs here will differ from previous estimates.

the jobs generated are assumed to be additional. The net jobs generated, with those assumptions, are set out in column J of Appendix 9.

- *Development Period* – Although there is no firm timetable for delivery of the Knowledge and Aviation Quarters, a delivery period of up to 20 years is projected by stakeholders, subject to securing relevant funding. Thus, it is assumed that 100 percent of all the jobs which can be generated by the scheme will have been generated by the end of the forecast period, i.e., 2022-2042.
- *Division of Additional Employment Between Blackpool and Fylde* – As noted above the strategic growth in the Enterprise Zone is programmed to occur in the Knowledge Quarter/Aviation Quarter which is within Fylde Borough. Accordingly, 100 percent of the additional jobs forecast are applied to the growth projections for Fylde. While some of the labour will be drawn from adjacent Blackpool, and from Wyre, the Labour Demand Model is a measure of where the labour is being drawn to, and therefore where employment land/premises need to be provided, rather than where the workers originate.
- *Construction Jobs* – Finally, it should be noted that this model measures the permanent jobs which will be accommodated in the new premises. While construction of the new buildings will support some employment, these will not necessarily be permanent or additional to existing construction labour and the growth in the construction sector projected in Baseline Forecasting.

8.33 With the above assumptions the Knowledge Quarter can be identified as generating 2,414 net additional jobs for Fylde Borough, with another 213 generated in the Aviation Quarter, to 2042, i.e. 2,627 additional jobs in total. Those jobs need to be applied to different industry sectors, relating to the 45-sector Cambridge Forecast. This is done, with justifications, in Table 79.

Table 79 - Blackpool Airport Enterprise Zone – Additional Strategic Jobs by Sector

Relevant Sectors	Office Sectors								Relevant Manufacturing Sectors		Comments
	IT services	Financial and Insurance	Real Estate	Legal accounting and	Head offices and management consultancies	Architectural and engineering	Other professional services	Business support services	Air transport	(Manufacture of) Other transport equipment	
Percentage Split of Relevant Sectors as at 2042.	10	8	6	28	7	9	10	22	N/A	N/A	Figures are the percentages of total jobs, each sector occupies, in 2042 in the Cambridge Econometrics Forecasts. The additional jobs from the Enterprise Zone are then split, by these percentages below.
Knowledge Quarter – Split of 2,414 jobs	724	145	97	531	121	169	193	435	N/A	N/A	Projected to be an office based scheme, plus at least one data centre. The scheme is identified as focusing on ICT activities but, in practice will likely accommodate office-based businesses in a range of sectors. Reflecting this it is assumed that 30 percent of the employment will be in IT Services with the remaining jobs split between the other office sectors.
Aviation Quarter– Split of 213 jobs	8	4	N/A	15	4	5	5	12	108	53	Scheme will be dominated by hangers, accommodating aircraft maintenance, manufacturing and related technical activities along with ancillary office/administration activities. Accordingly, a quarter of the jobs are assigned to office sectors (excluding Real Estate), a quarter of the jobs are applied to the (Manufacture of) Other Transport activities and half to Air Transport (i.e. aerospace operations and maintenance).
Total	732	149	97	546	124	174	198	446	108	53	2,627

Source: BE Group, 2023

8.34 The Study was also asked to consider the jobs impact of the main new build commercial projects of Blackpool’s £2 billion Growth and Recovery Programme, to be undertaken in Central Blackpool, specifically the Talbot Gateway (including Multiversity) and Blackpool Central programme areas, as discussed in Section 5.0. The analysis for this is set out in Table 80 reflecting stakeholder comments, average densities as set out in the HCA (Homes England) Jobs Density Guide 2015 and estimates of the proportion the jobs which are additional.

Table 80 - Central Blackpool Regeneration Programmes – Additional Jobs

Programme	Projects	Total Permanent Jobs Generated	Additional Jobs	Comments
Talbot Gateway	Holiday Inn	48	10	Jobs and additionality derived from Council comments
	Hotel Retail	29	7	Based on a Jobs Density of 15 sqm/job (HCA standard density, for high street retail, based on a net internal area of 435 sqm). Given the strong existing base of retail/leisure staff in Blackpool, a high degree displacement/relocation of existing workers/businesses, locally, is assumed with only 25 percent of the jobs being additional.
	Multiversity	32	8	The Town Deal business case, Levelling Up Fund application and Project Adjustment Requests identifies that the project will involve the relocation of 157 jobs of Blackpool and Fylde College. This will be the displacement of existing jobs in Blackpool only. However, it is also estimated that the Multiversity will generate 32 indirect jobs in town centre retail/Food and Beverage when in operation. Given the strong existing base of retail/leisure staff in Blackpool, a high degree displacement/relocation of existing workers/businesses, locally, is assumed with only 25 percent of the jobs being additional.
	Civil Service Hub, King Street	-	-	20,000 sqm new office building, under development. However, this facility will accommodate the relocation of existing DWP staff from elsewhere on the Fylde Coast and Preston. Any new jobs created here will be negligible.
	Talbot Gateway Phase 5	1,000	500 (approx.)	Full planning permission is being sought for a new six storey office building on the site of the former Apollo 2000 store, close to Blackpool north Railway Station (App. No. 24/0215). The property will have a Net Internal Area of some 4,919 sqm. Blackpool Council and its development partner Muse are in advanced discussions with an organisation that wishes to occupy the property. It is understood the new office will accommodate around 1,000 new jobs, of which at least half will be new jobs. Further details remain confidential, at this time, however and it is not known if the occupier is new to Blackpool and the Fylde Coast or represents a relocation/expansion of an existing local business or public sector organisation.
Blackpool Central	Heritage Zone – Food and Beverage Total	64	16	Based on a Jobs Density of 15 sqm/job (HCA standard density, for Restaurants and Cafes, based on a net internal area of 963 sqm). Given the strong existing base of retail/leisure staff in Blackpool, a high degree displacement/relocation of existing workers/businesses, locally, is assumed with only 25 percent of the jobs being additional.
	Heritage Zone	-	-	1,138 sqm of gross space proposed. However, employment

Programme	Projects	Total Permanent Jobs Generated	Additional Jobs	Comments
	-King Edward Pub for Food and Beverage and apartment-hotel on first floor			levels at the hotel could vary considerably depending on the quality of the hotel, the number of rooms and the range of additional facilities offered. It is therefore impossible to estimate.
	Heritage Zone - Re use of King Edward Apartment building for Food and Beverage ground floor and apartment hotel above	-	-	1,880 sqm of gross space proposed. However, employment levels at the hotel could vary considerably depending on the quality of the hotel, the number of rooms and the range of additional facilities offered. It is therefore impossible to estimate.
	Leisure Zone - Three indoor Theme Parks	328	41	Based on a Jobs Density of 70 sqm/job (HCA standard density, for Amusement and Entertainment Centres, based on a gross internal area of 22,962 sqm). Given the strong existing base of retail/leisure staff in Blackpool, a high degree displacement/relocation of existing workers/businesses, locally, is assumed with only 25 percent of the jobs being additional. 41 jobs deducted from the net total to allow for the 41 existing retail and service jobs projected to be lost by the Blackpool Central development.
	Leisure Zone - Hotel floorspace	-	-	7,226 sqm of gross space proposed. However, employment levels at the hotel could vary considerably depending on the quality of the hotel, the number of rooms and the range of additional facilities offered. It is therefore impossible to estimate.
	Leisure Zone – Food and Beverage	129	32	Based on a Jobs Density of 15 sqm/job (HCA standard density, for Restaurants and Cafes, based on a net internal area of 1,939 sqm). Given the strong existing base of retail/leisure staff in Blackpool, a high degree displacement/relocation of existing workers/businesses, locally, is assumed with only 25 percent of the jobs being additional.
Total	-	1,630	614	

Source: Various, 2024

8.35 Also included within broader regeneration plans is the restoration of the Stanley Buildings, Church Road. The refurbishment, now underway, will deliver 44 serviced offices, accommodating 1-12 people each and 265 sqm of co-working space. Overall, the facility could accommodate 153 people. However, this facility will be aimed at local micro businesses, including start-ups, rather than strategic change. An allowance for projected local growth, in relevant sectors, is already made in the Baseline Cambridge forecast.

- 8.36 This analysis suggests that the relevant programmes would generate 1,630 jobs in total, of which 614 would be additional. However, in the Blackpool Central programme area this employment is mostly derived from the new retail, food and beverage and theme park facilities. There will be further employment from the hotels. employment levels at the hotels could vary considerably depending on the quality of the hotel, the number of rooms (from one bed/job for a luxury hotel to five beds/job in a budget hotel) and the range of additional facilities offered. It is therefore not possible to estimate at this time. None of these additional jobs are in sectors which could require office, industrial or warehouse space, affecting the OAN forecasting for Blackpool.
- 8.37 In the Talbot Gateway programme area, the main office based scheme underway at this time, is the 20,000 sqm Civil Service Hub on King Street, Talbot Gateway. This facility will accommodate the relocation of existing DWP staff from elsewhere, however. Any new jobs created here will be negligible.
- 8.38 Also proposed is Talbot Gateway Phase 5, a new build 4,919 sqm office. Negotiations are underway with an occupier who could bring some 1,000 jobs into the area, of which at least half could be new. At the time of writing, it is not clear if this organisation represents inward investment into Blackpool and the Fylde Coast, which might not be anticipated by Cambridge forecasting, or a relocation within the sub-region which can be considered part of the baseline growth already projected. Also, there is no understanding about what the business sectors of the proposed occupier are, thus what sectors should be applied to it in any policy on forecast. Once more information about the investment is known, it could be the subject of separate scenario testing. However, as the space for this organisation's growth is being provided for within the proposed new office building, it doesn't directly generate demand elsewhere.
- 8.39 Reflecting the above comments, Tables 81 and 82 provide a revised policy on calculation of forecast land needs in Fylde Borough only, reflecting the growth potential of the Knowledge Quarter/Aviation Quarter. It utilises the same forecast method as the baseline forecast but with the inclusion of the additional jobs identified in Table 73 above. Forecasts are provided with and without an allowance for homeworking. The detailed calculations can be found in Appendix 8.

Table 81 – Fylde Policy On Labour Demand Forecast 2022-2042 – With no Reduction in Employment for Homeworking⁵⁴

Use Class	Overall, Jobs Change (FTE)	Jobs Needing E(g)/B Class Space	Floorspace Need, Sqm	Land Need, Hectares
Offices	4,250	3,496	48,948	12.24
Light/General Industrial	-2,504	-2,504	- 122,696	- 30.67
Storage and Distribution	229	110	7,694	1.92
Other Jobs - Retail/Wholesale	139	-	-	-
Other Jobs - Accommodation	82	-	-	-
Other Jobs - Food and Beverage Services	455	-	-	-
Other Jobs - Arts and Recreation	154	-	-	-
Other Jobs - Other Services	650	-	-	-
Total	3,455	1,102	-66,054	-16.51

Source: BE Group, 2023

⁵⁴ Columns may not total due to rounding

Table 82 – Fylde Policy On Labour Demand Forecast 2022-2042 – With a Reduction in Employment for Homeworking⁵⁵

Use Class	Overall, Jobs Change (FTE)	Jobs Needing E(g)/B Class Space	Floorspace Need, Sqm	Land Need, Hectares
Offices	2,896	2,383	33,368	8.34
Light/General Industrial	-2504	-2504	-122,696	-30.67
Storage and Distribution	229	110	7,694	1.92
Other Jobs - Retail/Wholesale	139	-	-	-
Other Jobs - Accommodation	82	-	-	-
Other Jobs - Food and Beverage Services	455	-	-	-
Other Jobs - Arts and Recreation	154	-	-	-
Other Jobs - Other Services	650	-	-	-
Total	2,101	-11	-81,634	-20.41

Source: BE Group, 2023

8.40 Clearly the inclusion of the Policy On jobs does generate an uplift in projected employment growth and therefore premises and land needs, in the office sector, a more than doubling of all figures with or without an allowance for homeworking. The needs can be summarised as:

- Without a Reduction for Homeworking – 1,102 extra jobs in relevant sectors (3,455 extra jobs across all sectors), equating to a negative requirement of -66,054 sqm of floorspace and -16.51 ha of land, i.e. the local authority area needs less premises/land than it presently has.
- With a Reduction for Homeworking – 11 fewer jobs in relevant sectors (+2,101 extra jobs across all sectors), equating to a negative requirement of -81,634 sqm of floorspace and -20.41 ha of land, i.e. the local authority area needs less

⁵⁵ Columns may not total due to rounding.

premises/land than it presently has.

8.41 However, the uplift in office employment is still not sufficient to overcome the large projected net losses in industrial land, and so the overall net figures remain negative. If we again exclude the industrial change in this scenario and focus on the office and warehouse forecasts, where growth is projected, the Policy On needs are:

- Without a Reduction for Homeworking – 3,606 extra jobs in relevant sectors, equating to a need of 56,642 sqm of floorspace and 14.16 ha of land.
- With a Reduction for Homeworking – 2,493 extra jobs in relevant sectors, equating to a need of 41,062 sqm of floorspace and 10.26 ha of land.

Fylde – Lancashire (BAE Warton) Enterprise Zone

8.42 As was noted in Section 5.0, there has been no significant development on the Enterprise Zone site at Warton, but BAE Systems have started work on a new masterplan to market the Enterprise Zone and the opening of the Preston Western Distributer Road, which improves connectivity between Warton and the motorway network, is expected to lead to increased interest in the Warton part of the Lancashire Enterprise Zone.

8.43 The site is still available, and BAE Systems have aspirations for it. They will deal with it through the new masterplan. Separately, Fylde Council are aware that BAE Systems have moved a number of jobs from its offices at Warton to Samlesbury and so there is likely to have been a net reduction in jobs based at the Warton site, although BAE employment contracts treat Samlesbury and Warton as a single base and so it is difficult to ascertain who works where.

8.44 The lack of past growth and uncertainty about future plans for change mean that it is not possible to undertake a policy on forecast for the Lancashire (BAE Warton) Enterprise Zone.

Wyre – Hillhouse Enterprise Zone

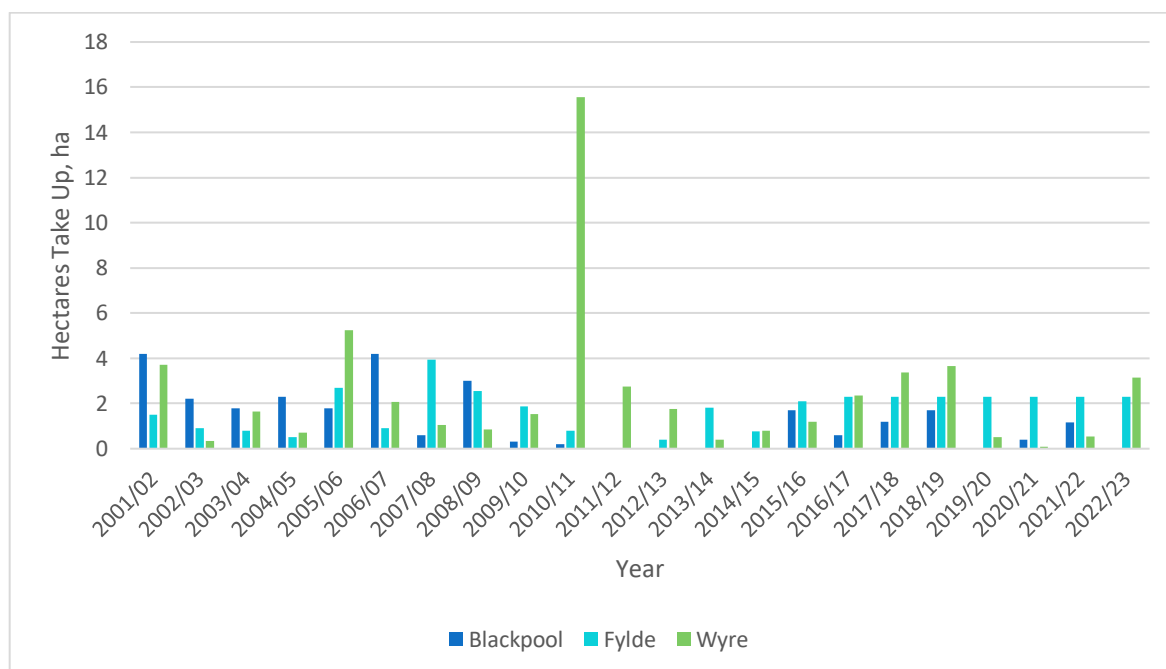
8.45 As was noted in Sections 4.0 and 5.0, Hillhouse has seen a range of development over the last decade, but most take up has been from local firms moving within the district, with a negligible net gain in jobs and limited inward investment. Additionally, the loss of major occupier Vinnolit means that the Enterprise Zone has likely seen a net reduction of jobs, to date.

- 8.46 Moving forward, most development at Hillhouse is expected to be for local firms. Any jobs increase which results from such development will not be additional to forecast baseline jobs growth. Other investment will be for energy generation infrastructure which whilst land hungry, will generate negligible numbers of additional permanent jobs for Wyre. There are infrastructure constraints that are preventing the wider delivery of the northern site, which will require its own dedicated northern access road. Due to the pending decision by Government on the Rail Reinstatement Project for the Poulton to Fleetwood rail line, as a worst case cost option, the Northern access route will also require a rail overbridge. The new northern access and wider infrastructure currently remains unfunded. Finally, there are questions about the deliverability of some plans put forward for the Enterprise Zone, most notably large scale office development in the northern site, which are unlikely to be viable without significant public sector support.
- 8.47 Given the uncertainty regarding some plans and the likelihood that jobs growth at the Enterprise Zone, additional to the local growth already identified in the baseline Cambridge Forecast, will be negligible, it is not possible to undertake a policy on forecast for the Hillhouse Enterprise Zone.

PAST TAKE-UP

- 8.48 Employment land take-up annually is recorded by the three Councils, with consistent gross data available from all three local authorities for the 22 year period 2001/2002 and 2022/2023. This data is shown in Figure 64.

Figure 64 - Fylde Coast Gross Take Up 2001/2002-2022/2023



Source: Blackpool Council, Wyre Borough Council, Fylde Borough Council, 2023

- *Blackpool: Pre-2012/2013 data taken from the Blackpool Employment Land Study (2013), post-2012/2013 data taken from the Employment Land Update 2021 and Blackpool Airport Enterprise Zone Topic Paper (2022, 2022/2023 data provided by the Council). Both documents credited to Blackpool Borough Council.*
- *Fylde: Data is taken from the most up to date Fylde Borough Council Business and Industrial Land Schedules available, of March 2015, March 2018 and March 2023 respectively. Figures may vary from more historic monitoring. For the years 2016/2017-2017/2018 and 2018/2019-2022/2023 annual take up figures are not available and accordingly the 2 and 5-year totals are split evenly across the two periods. To provide as complete a picture of take up in the Borough as possible, annual completions recorded on sites covered under Local Plan Policy EC1 Employment Land, EC1 Existing Employment Sites and EC2 Employment Opportunities (i.e. windfalls outside of allocated Employment Sites/Areas) (Policies EM1, EM2, EM3 in the previous Local Plan) are included in the above figures.*
- *Wyre: All data from Wyre Borough Council annual employment monitoring.*

8.49 Based on this data, the Fylde Coast has seen 118.30 ha of employment land taken up since 2001/2002 or 5.38ha/year. By local authority area, take up comprises:

- Blackpool: 27.37 ha (23.1 percent of the total) or 1.24 ha/year
- Fylde: 37.68 ha (31.9 percent of the total) or 1.71 ha/year
- Wyre: 53.25 ha (45.0 percent of the total) or 2.42 ha/year.

Take Up Analysis – Blackpool

- 8.50 Blackpool saw its highest take up rates in the 2000s, with negligible or zero completions recorded over 2009/2010 to 2014/2015. These latter years of low growth reflect a period of national recession. Take up after this period has been reduced.
- 8.51 Stakeholders report that the higher take up rates in the 2000s in Blackpool, in part at least, reflect public sector funded regeneration programmes implemented over this period. Over the period 2001 to 2012, Blackpool benefitted from Single Regeneration Budget (SRB) Challenge Fund funding for urban regeneration. Blackpool was successful in gaining SRB2 and SRB5 funding, and these monies were specifically directed towards land owned by Blackpool Council in the North East of the Borough for the development of Blackpool Technology Park and land at Blackpool Airport (land also owned by the Council) resulting in the establishment of Blackpool Business Park. The funding provided incentives for businesses to locate in Blackpool. Publicly funded development, on Council-owned land, took place between 2001 and 2008 and is recorded in the above take up figures.
- 8.52 This publicly supported growth, on Council-owned land, was not repeated in the 2010s and is not likely to be repeated in the future. Other than the land at the Blackpool Airport Enterprise Zone within Blackpool (the Eastern Gateway), the Council does not own similar swathes of land that they could bring forward through funding in the future. It should also be noted that the incentives offered by the Enterprise Zone, which have now ended, did not directly fund property development in the way SRB funding did, rather supported business operations.
- 8.53 Thus, the case can be made that take up figures, in Blackpool, in the 2000s, were artificially inflated by public investment and are not representative of the level of development which might be achieved locally in the future. If only take up since the start point of the Blackpool Local Plan Part 1: Core Strategy 2012-2027, i.e. 2012, is used then 6.769 ha was recorded over 11 years (to 2022/2023), or 0.62 ha/year. This take up figure excludes office use land take up and has only taken into account industrial and warehouse uses.

Take Up Analysis – Fylde

- 8.54 Fylde saw comparatively modest take up rates in the early 2000s, an average of 1.22 ha/year to 2006/2007. Completion rates increased for the next few years, to 1.88-3.93

ha/year, before reducing again for the period of national recession. In Fylde's case, the period of low growth ran from 2010/2011 to 2014/2015, although only in one year, 2011/2012, was a near zero take up figure of 0.04 ha recorded. Since the adoption of Fylde Local Plan to 2032, in 2018, Fylde Borough has recorded 11.49 ha of take up or 2.30 ha/year, i.e.0.59 ha/year above the 22 year average. Thus, since the allocation of extra land in Fylde, in the Local Plan (including 14 ha to meet Blackpool's needs), some increase in development can be noted. However, less than a quarter of the recorded take up since 2018/2019, 2.64 ha, has occurred on the Employment Land allocated under Policy EC1 so there does not appear to be a direct correlation between the provision of this land and increased completion levels. However, other factors including the Covid-19 Pandemic in 2020/2021 and subsequent macro-economic issues will also have affected local development rates, over the last five years, regardless of the quantum of land offered.

- 8.55 Since 2018, 4.12ha (36 percent of total take up) has been delivered on employment opportunity sites, outside of the identified Employment Areas and allocated Employment Sites. 3.88 ha of this, or 94 percent, comprised farm conversions, mostly for industrial and warehouse uses. Thus, while development is occurring on defined employment sites and in Employment Areas, it is also important to recognise the strength of the rural economy which does not operate on defined employment allocations.
- 8.56 Focusing just on allocated employment land, since 2011/2012 take up has focused at Whitehills Business Park, with some 4.58 ha completed here, or just over a third of the 12.25 ha completed on Policy EC1 Employment Land and Existing Employment Sites, over this period. This reflects identified demand, which focuses on the M55 Corridor. The only other Employment Area to see more than a hectare of take up over the same period was MUS3 – Mill Farm Sports Village, Wesham. A split of take up, by use class, is not available although examination of the Employment Areas, suggests that, within Fylde Borough, new office space has only been delivered at Whitehills Business Park since 2011/2012 and limited to two buildings.

Take Up Analysis – Wyre

- 8.57 Take up in Wyre fluctuated in the 2000s, with peaks in 2001/2002 and 2005/2006 of 3.72 ha and 5.23 ha respectively. Conversely, 2002/2003 and 2004/2005 saw take up levels of sub-1 ha each, 0.33 ha and 0.70 ha respectively.
- 8.58 As Figure 63 shows, Wyre Borough then saw an exceptional 15.55 ha of take up in 2010/2011, more than six times the average take up rate for Wyre and treble the next highest annual take up rate in the Borough, 5.23 ha in 2005/2006. This 15.55 ha included 13.3 ha completed at Lancashire Waste Technology Park, Thornton. This rate of annual take up is clearly exceptional, both in Wyre and across the Fylde Coast, and no comparable annual take up rate has been achieved before or since.
- 8.59 If the 2010/2011 Wyre take up of 13.3 ha at Lancashire Waste Technology Park is excluded, as being exceptional and not typical of wider growth, the total take up in Wyre reduces to **39.95 ha or 1.82 ha/year**.
- 8.60 Take up rates remained high over the recessionary period 2008-2013, although this again reflects the impacts of 13.3 ha of take up for Lancashire Waste Technology Park, a publicly funded scheme by LCC and Blackpool Council which would not have been impacted by weaknesses in the private sector property market. Excluding this development, average annual take up reduces to 1.51 ha/year over the 7 year period 2007/2008-2013/2014, i.e. below average for the full 22 year period of recorded take up. Take up rates also reduced over the later recessionary period, 2012/2013, extending onwards to 2014/2015. This suggests that unlike in Blackpool and Fylde, Wyre had a backlog of developments, committed/underway at the onset of recession, that then took multiple years to complete, delaying the impact of the recession on completion levels.
- 8.61 Wyre has not seen any years with no take up recorded and only three years – 2002/03, 2013/14 and 2020/21 which saw less than 0.50 ha/year of land completed. Since the adoption of the Wyre Local Plan (2011-2031) in 2019, which identified a range of new employment land allocations, Wyre has recorded 7.97 ha of take up or 1.59 ha/year, i.e. slightly below the 22 year average rate noted above. A more detailed breakdown of take up, since 2011/2012, has been provided by the Council and identifies the following:
- Just over half the take up since 2011/2012 has been in Allocated sites or in Existing Employment Areas. 48.3 percent has been in other locations.
 - Take up is split relatively evenly between the Wyre Peninsular, which saw 37.6

percent of completions, the A6 Corridor (31.4 percent) and the Rural Area (31.0 percent).

- As elsewhere, development, in the last decade at least, has been overwhelmingly for industrial and warehouse uses. 85.8 percent of take up since 2011/2012 has been for B2/B8 uses, increasing to 87.8 percent with E(g)(iii) light industrial completions. These completions are split evenly between E(g)(iii)/B2 industrial and B8 warehousing which accounted for 43.8/9 percent of the total completions each. Office development only accounted for 7.5 percent of take up, with another 4.8 percent of completions for research and development uses.

8.62 By local authority area, the take up figures, adjusted for the above issues, are:

- Blackpool – 6.769 ha of take up was recorded over 11 years of the Blackpool Local Plan Part 1: Core Strategy 2012-2027 (2011/2012 to 2022/2023), or 0.62 ha/year.
- Fylde – 37.68 ha of take up was recorded over 2001/2002 to 2022/2023, or 1.71 ha/year.
- Wyre – 39.95 ha of take up was recorded over 2001/2002 to 2022/2023, less the exceptional take up of 13.3 ha at Lancashire Waste Technology Park in 2010/2011, or 1.82 ha/year.

EMPLOYMENT LAND LOSSES

8.63 The three Councils have considered the quantum of existing employment land developed for other uses, e.g., residential, leisure, retail, etc. within their local authority areas.

Losses Analysis – Blackpool

8.64 In the case of Blackpool, the 'Employment Land Update 2021 and Blackpool Airport Enterprise Zone Topic Paper' (2022) identified a loss of 9.6 ha of designated employment land to other uses since 2012/2013 or *-0.87 ha/year*. This included the loss of 9 ha of land at the National Savings and Investment Site, Preston New Road to housing and the loss of 0.6 ha at Squires Gate Industrial Estate to an Aldi food store. Any losses of E(g)(i)/B-Class land and premises outside of the Employment Areas were not identified.

- 8.65 The identified annual rate of losses exceeds the identified annual rate of take up, noted above, giving an OAN for the forecast period of -5 ha, i.e.

0.62 ha/year (identified average annual take up rate) minus -0.87 ha/year (average annual losses rate) equals -0.25 ha/year. -0.25 ha/year x 20 (years, 2022-2042 forecast period) equals -5.0 ha OAN.

- 8.66 By this measure, Blackpool does not need any of its available employment land supply and could lose a further 5 ha of developed employment land from its Employment Areas.

- 8.67 This is clearly unrealistic. As noted in Section 7.0, Blackpool's Employment Areas are well occupied while stakeholders report ongoing good demand for industrial and warehouse units of up to 4,000 sqm. Additionally, as noted in Section 5.0, large businesses on the Fylde Coast are looking to grow and rarely able to find the premises they need readily available.

- 8.68 However, not all losses automatically need to be accounted for in OAN figures. While some losses may solely reflect the desire of landowners to convert sites/buildings to higher value uses, the properties lost may also be of a specification, quality, tenure or in a location that is no longer desired by the market. The survey of Employment Areas, summarised in Section 7.0, suggests that the Fylde Coast does not have a particular problem with large amounts of low grade stock. Also, given the high demand for floorspace in the sub-region, versus the low available supply, it is likely that if the individual buildings recorded lost were still needed by the market, they would have been occupied.

- 8.69 In the case of Blackpool, the 9 ha of land at the National Savings and Investment Site, Preston New Road comprised older, public sector offices, stock which no longer met modern requirements and was unlikely to have been reoccupied, or redeveloped, for offices, particularly given current and past constraints in the office market nationally. In principle, the land could have been re-used for industrial or warehouse uses, but this may not have been achievable in what is, the remaining NS&I office aside, an exclusively residential area.

- 8.70 If the 9 ha is excluded then the only recorded loss in the period is the 0.6 ha at Squires Gate Industrial Estate, which gives a reduced loss rate of *-0.05 ha/year*. Deducted from the average annual take up rate, this gives a revised annual take up rate of **0.57 ha year**.

Projected forward over the 20 year, 2022-2042, forecast period gives an OAN of 11.40 ha, i.e. 0.57x 20.

Losses Analysis – Fylde

8.71 In the case of Fylde, the latest 'Business and Industrial Land Schedule' (March 2023) identified 15.27 ha of land lost for business and industrial use, between April 2011 and March 2015. This comprised two large areas of employment land lost to primarily residential uses:

- Electronic Data Systems, Heyhouses, St. Annes – 7.45 ha
- GEC Marconi, Lytham Road, Warton (BAE Warton) – 7.82 ha

8.72 These represent the only recorded losses of employment land within the Borough's allocated employment sites and areas since 2011. Outside of the allocations, Fylde Council has identified another 4.07 ha in losses over the last decade. These comprise nine distinct losses, six of which were in St Annes or Lytham and mostly comprised the loss of office or warehouse space. This gives a total combined loss figure of 19.34 ha or *-1.61 ha/year*.

8.73 As with Blackpool, including all losses in calculations gives an unrealistic figure, which provides little opportunity for local business growth. In this case the resulting OAN to 2042 is just 2 ha, i.e.

1.71 ha/year (identified average annual take up rate) minus -1.61 ha/year (average annual losses rate) equals 0.10 ha/year. 0.10 ha/year x 20 (years, 2022-2042 forecast period) equals 2.0 ha OAN.

8.74 Again, however, not all losses need to be accounted for as some losses represent stock which is fully surplus to market needs. As with Blackpool, older offices are least likely to be needed by the market, particularly given constraints on demand, both today and in the recent past. Also, as all the recorded losses of office stock took place in the Lytham and St Annes settlement areas, on sites bounded by housing, it is less likely that the land could simply have been redeveloped for industrial, or warehouse uses.

- 8.75 Deducting land in mostly office use, excludes the 7.45 ha Electronic Data Systems, Heyhouses, St. Annes site and 2.20 ha of smaller losses, a total of 9.65. The remaining industrial and warehouse losses total 9.69 ha of land lost of over 2011-2022 or 0.88 ha/year. Deducted from the average annual take up rate of 1.71 ha/year, this gives a revised annual take up rate of **0.83 ha year. Projected forward over the 20 year, 2022-2042, forecast period gives an OAN of 16.6 ha, i.e. 0.83x 20.**

Losses Analysis – Wyre

- 8.76 In the case of Wyre, the latest Employment Monitoring Report (2022/2023) recorded 10.24 ha of losses over 2011/2012-2022/2023 or *-0.85 ha/year*. 95 percent of the recorded losses were in the Wyre Peninsula and 87.2 percent comprised the loss of B2 or B8 premises. The Council also note that its historical approach to monitoring loss means that the loss is only recorded as such when new use is complete. For larger, more complex sites, e.g. large housing schemes, this can mean a delay of some years between the consent for alternative uses and its identification as a loss. The 10.24 ha noted here thus comprises completed losses only. Two key sites which are being lost to housing, but where redevelopment has yet to fully complete are:
- Norcross, Cleveleys – 11.12 ha.
 - Former Council Offices, Fleetwood Road South, Thornton – 0.9 ha.
- 8.77 These two sites represent a loss of 12.02 ha of employment land within the Borough over 2011/2012-2022/2023 or *-1.00 ha/year*. This gives a total combined loss figure, with completed and uncompleted losses, of 22.26 ha or *-1.86 ha/year*.
- 8.78 As with Blackpool and Fylde, including all losses in calculations gives an unrealistic figure, which provides little opportunity for local business growth. In this case the resulting OAN to 2042 is *-0.80 ha, i.e.*

1.82 ha/year (identified average annual take up rate) minus -1.86 ha/year (average annual losses rate) equals -0.04 ha/year. -0.04 ha/year x 20 (years, 2022-2042 forecast period) equals -0.80 ha OAN.

- 8.79 Consistent with the approach in Blackpool and Fylde, if losses in office land are excluded, the loss rate reduces to 8.97 ha or *-0.75 ha/year*. This excludes the two uncompleted losses, noted above, and 12.4 percent of the losses recorded in the latest Employment Monitoring Report (2022/2023) identified as being in E(g)(i) or E(g)(ii) use.

8.80 Deducting -0.75 ha/year from the average annual take up rate of 1.82 ha/year gives a revised annual take up rate of **1.07 ha year. Projected forward over the 20 year, 2022-2042, forecast period gives an OAN of 21.40 ha, i.e. 1.07x 20.**

8.81 Table 83 summarises the final annual take up and adjusted losses rates used in this Study, and the OAN projections resulting, for each Fylde Coast Local Authority.

Table 83 - Take Up OAN Projections Summary, ha

Local Authority Area	Hectares/Year			OAN 2022-2042 (Revised Annual Take Up Rate x 20)
	Annual Take Up Rate	Adjusted Losses Rate	Revised Annual Take Up Rate (Take Up Minus Losses)	
Blackpool	0.62	0.05	0.57	11.40
Fylde	1.71	0.88	0.83	16.60
Wyre	1.82	0.75	1.07	21.40
Fylde Coast Total	4.15	1.68	2.47	49.40

Source: BE Group, 2024

SUMMARY OF FYLDE COAST OAN AND FURTHER ADJUSTMENTS

8.82 This Section has undertaken Labour Demand and Past Take-Up modelling to consider the OAN for Blackpool, Fylde and Wyre. The findings are summarised in Tables 84 to 86.

Table 84 - Blackpool OAN Projections 2022-2042, ha

Sector	Labour Demand, Policy Off		Past Take Up
	Without a Deduction for Homeworking	With a Deduction for Homeworking	With an Adjusted Deduction for Industrial/warehouse Losses
Office (inc. Research and Development)	3.23	2.57	-
Industrial	-5.01	- 5.01	11.40 ⁵⁶
Warehouse	1.18	1.18	
Total	-0.60	-1.26	11.40

Source: BE Group, 2023

Table 85 - Fylde OAN Projections 2022-2042, ha

Sector	Labour Demand, Policy Off		Labour Demand, Policy On		Past Take Up
	Without a Deduction for Homeworking	With a Deduction for Homeworking	Without a Deduction for Homeworking	With a Deduction for Homeworking	With an Adjusted Deduction for Industrial/warehouse Losses
Office (inc. Research and Development)	4.36	2.98	12.24	8.34	-
Industrial	- 31.30	- 31.30	- 30.67	-30.67	16.60 ⁵⁷
Warehouse	1.26	1.26	1.92	1.92	
Total	-25.68	-27.06	-16.51	-20.41	16.60

Source: BE Group, 2023

⁵⁶ It is assumed that future take up will be primarily/exclusively for industrial and warehouse uses, reflecting past completion trends since 2012/2013, as well as the private sector development proposed at this time.

⁵⁷ As noted in Paragraph 8.53, a split of past completions by use class is not available for Fylde. However, take up can be assumed to be primarily/exclusively industrial and warehouse based on past trends which have only seen a very limited delivery of new offices at Whitehills Business Park. New offices are only in the pipeline at Blackpool Airport Enterprise Zone, something accounted for in the Labour Demand, Policy On model.

Table 86 - Wyre OAN Projections 2022-2042, ha

Sector	Labour Demand, Policy Off		Past Take Up ⁵⁸
	Without a Deduction for Homeworking	With a Deduction for Homeworking	With an Adjusted for Industrial/warehouse Losses
Office (inc. Research and Development)	3.00	2.21	2.61
Industrial	-4.91	- 4.91	9.41
Warehouse	0.61	0.61	9.38
Total	-1.30	-2.09	21.40

Source: BE Group, 2023

- 8.83 Clearly there are substantial differences in the outputs of the different models. These are most pronounced in relation to industrial needs where the Labour Demand forecasts indicate a decline in manufacturing OAN while the completions trends, identified local pipeline of development and market analysis suggest strong growth. Before consideration of a preferred model, further adjustments are made below to allow the models to better reflect real world conditions.

Further Adjustments

- 8.84 To provide an indication of the final need for employment land, it is appropriate to allow for any large scale displacement of businesses in the Fylde Coast, to redevelopment programmes, and to provide some margin within the supply of land to provide a choice of sites.

Displacement

- 8.85 It needs to be considered if there is a need to allow for 'Displacement' on the Fylde Coast. This refers to major redevelopment projects that will displace existing office, industrial or warehouse businesses, companies that will need to be relocated locally, generating land and premises requirements additional to baseline OAN. At this time, the largest likely loss in Blackpool is the 28,654 sqm Warbreck Hill office, expected to be redeveloped for other uses in the Local Plan period. However, DWP staff have already vacated this building and will be accommodated in the new King Street office by 2025,

⁵⁸ The split of Past Take Up OAN, by Use Class, reflects patterns in recorded completions and losses since 2011/2012.

i.e. displacement here has already occurred.

- 8.86 In Fylde, the relocation of airport uses south to make way for the Knowledge Quarter proposals, at Blackpool Airport Enterprise Zone, represent the displacement of business activities within one site and should not generate significant additional land and property requirements. In Wyre, redevelopment proposals at Fleetwood Marina and Dock would represent modest losses/displacements compared to the more strategic proposals elsewhere. Allowances for smaller scale losses are discussed separately below.
- 8.87 Discussions with the neighbouring local authorities of the Fylde Coast FEMA have also not identified any cross boundary displacements which may generate additional needs in the Fylde Coast. Thus, it is not considered that an additional allowance of need, to account for any displacement, needs to be made for Blackpool, Fylde or Wyre.

Buffer

- 8.88 The three local authority areas should also have a buffer in supply to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the forecast period. This makes some allowance for the exceptional loss of further employment land to non E(g)/B-Class uses, over and above, that already allowed for or for sites that do not come forward. It allows for increasing difficulty in monitoring losses moving forward as changes of use, away from E(g), B2, B8 uses, increasingly occur via the enhanced permitted development rights available under the 2020 Use Classes Order. It also allows for a margin for error in the forecasting process.
- 8.89 There is no set guidance on how long this buffer should be, however, in over 70 employment land studies completed by BE Group over the last 15 years, a buffer of 3-5 years has usually been applied, i.e. a 15-25 percent uplift on the 20-year forecast period used in this Study. In past Employment Land Studies on the Fylde Coast a 2-4 year buffer was used.⁵⁹ The approach of these studies has since been found sound in Examinations in Public for the Blackpool, Fylde and Wyre. **To give an element of consistency with past research a 3 year or 15 percent buffer is applied here.**

⁵⁹ Relevant studies include the Blackpool Employment Land Study 2013 (Issued 2014), the Wyre Employment Land and Commercial Leisure Study (2012), the Wyre Employment Land Study Update (2015), the Wyre Employment Land Study Update Addendum Report (2015) and the 2015 Wyre Employment Land Study Addendum II (2017). The last Fylde Employment Land Review (2012) did not include any buffer.

Recommended Models

- 8.90 **Office OAN:** Experience suggests that the quantum of office space required by businesses is strongly driven by the number of staff they have to accommodate. This differs from the industrial and warehouse markets where space requirements are likely to reflect the number and scale of production processes which need to be housed, and/or the amount of parts and finished goods which need to be stored, rather than staffing numbers. Thus, the jobs-based Labour Demand model is likely to best project office sector needs moving forward. As the majority of projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward.
- 8.91 Discussions with stakeholders suggest that some two years after the end of the Covid-19 Pandemic and associated Lockdowns, homeworking and hybrid working practices are here to stay with impacts on the quantum of space businesses need. While it is not possible to say exactly how working practices will evolve to 2042, Labour Demand models net of homeworking are more realistic at this time. By local authority area, the recommended office sector OANs are shown below. **All figures include a 15 percent buffer for flexibility and choice:**
- **Blackpool – 2.96 ha**
 - **Fylde – 9.59 ha.** Here the Policy On forecast is recommended as providing the most complete picture of employment change in the Borough, and particularly accounting for the Knowledge Quarter, Blackpool Airport Enterprise Zone, the largest office development likely on the Fylde Coast to 2042
 - **Wyre – 2.54 ha.**
- 8.92 **Industrial and Warehouse OAN:** It should first be noted that industrial and warehouse needs can be linked together as, at the local scale at least, demand for industrial/warehouse space is frequently interchangeable, particularly on industrial estates where outline consents are usually for general B Class Units, with the ultimate use determined by the occupier.
- 8.93 As referenced above, requirements for industrial and warehouse premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker. Industrial and warehouse companies

are also more likely to acquire and hold onto expansion land and premises, even in times of contraction in the business, than office sector companies, in anticipation of future growth. This results in a weaker link to the jobs-based Labour Demand modelling that was true for offices. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector, across the Fylde Coast, which is at odds with identified market demand and the almost exclusively industrial pipeline of development identified on local employment sites.

8.94 Here therefore the Past Take Up model is recommended as it is independent of jobs change projections and based on real world trends. It accounts for periods of growth and recession in the local economy, allowing that such economic growth and decline will continue to 2042. It is thus likely to be better in tune with real market demand than the Labour Demand model. By local authority area, the recommended industrial/warehouse sector OANs are shown below. Where possible an allowance has been made for any office based take up which may have been included in the model data and would lead to double counting with the Office OAN model above, although the specific approach used on this matter depends on the monitoring data available from each local authority.

All figures include a 15 percent buffer for flexibility and choice:

- **Blackpool – 13.11 ha.** N.B. The past take up this projection is based on has exclusively comprised the completion of industrial and warehouse uses
- **Fylde – 19.09 ha.** N.B. As noted in Paragraph 8.53, a split of past completions by use class is not available for Fylde. However, take up can be assumed to be primarily industrial and warehouse based on past trends which have only seen a very limited delivery of new offices at Whitehills Business Park.
- **Wyre – 21.61 ha.** N.B. Here a deduction of 12.21 percent is made to allow for the percentage of take up which is likely to be office based, reflecting past completion trends since 2011/2012. This deduction is made to avoid double counting with the preferred office OAN forecasting model, noted above.

8.95 How the preferred OAN figures are derived is summarised in Table 87.

Table 87 – Preferred OAN Summary

Sector	Base Requirement	Addition – Displacement	Addition – Buffer (15 Percent Uplift)	Final OAN
Blackpool				
Office (inc. R&D) <i>(Need based on Labour Demand, Policy Off)</i>	2.57 <i>(From FTE Jobs Growth, with a 20.2 percent reduction for homeworking)</i>	N/A	+0.39	2.96
Industrial/Warehouse <i>(Need based on Past Take Up, with an adjustment for industrial/warehouse losses)</i>	11.40 <i>(0.57 ha/year x 20)</i>	N/A	+1.71	13.11
Total	13.97	-	+2.10	16.07
Fylde				
Office (inc. R&D) <i>(Need Based on Labour Demand, Policy On)</i>	8.34 <i>(From FTE Jobs Growth, with a 31.8 percent reduction for homeworking)</i>	N/A	+1.25	9.59
Industrial/Warehouse <i>(Need based on Past Take Up, with an adjustment for industrial/warehouse losses)</i>	16.60 <i>(0.83 ha/year x 20)</i>	N/A	+2.49	19.09
Total	24.94	-	+3.74	28.68
Wyre				
Office (inc. R&D) <i>(Need Based on Labour Demand, Policy Off)</i>	2.21 <i>(From FTE Jobs Growth, with a 26.1 percent reduction for homeworking)</i>	N/A	+0.33	2.54
Industrial/Warehouse <i>(Need based on Past Take Up, with an adjustment for industrial/warehouse losses)</i>	18.79 <i>(1.07 ha/year x 20 = 21.4 ha. Less 12.21 percent) (A reduction of 12.21 percent is made to allow for the percentage of take up which is likely to be office based, to avoid double counting with the office OAN forecasting model.)</i>	N/A	+2.82	21.61
Total	21.00	-	+3.15	24.15

Source: BE Group, 2024

MONITORING ARRANGEMENTS

8.96 Monitoring is an integral part of plan production, a key contributor to the evidence base. As part of this study BE Group has reviewed the monitoring methodologies of the three Fylde Coast local authorities to establish whether there is scope for improvement at the collective, or individual, level. Table 88 summarises the monitoring process for each local authority. From the information supplied it is noted all the planning departments are

monitoring information on employment land completions, both within and outside the adopted employment land allocations and Employment Areas.

- 8.97 Losses are also monitored by all three Councils although Fylde only record losses where the site can never revert back to employment. i.e. lost to residential redevelopment/refurbishment. Losses are only counted once the development is complete.
- 8.98 All the authorities identify new relevant planning applications by running queries through their respective databases, which link to Development Management, mostly on a monthly basis. The sizes of application sites are identified from the planning application data, as are the sizes of the buildings to be altered or developed. This is a possible point of inaccuracy as the red line boundaries given in planning applications often overstate the area of land where change will occur. This is discussed further below.
- 8.99 The progress of applications is generally checked through a range of sources including tax records, Google Maps/Streetview, contacts with stakeholders and, links to Building Control records. Site visits are undertaken as required. Data on relevant applications, commitments, and completions is recorded in Excel or Access databases to provide the relevant monitoring data for the Authority Monitoring Reports and related updates, produced by each Council.

Table 88 – Monitoring Process – Comparative Table for Local Authorities

Stage	Blackpool	Fylde	Wyre
Identify new relevant planning permissions	<p>Identify relevant employment policies from the Local Plan (includes Policies CS3, CS24, DM7 and DM8).</p> <p>Produce Crystal reports for each of the above policies. When determining planning applications, Development Management officers tag relevant employment policies to planning applications. Crystal reports pull together all planning applications that have been decided that are tagged under a particular policy.</p> <p>Read through the list of applications in each Crystal report and read through the development proposal to manually filter out relevant applications for each employment monitoring indicator in the Authority Monitoring Report.</p> <p>Once all relevant applications are filtered out from the Crystal report, they are input on the Excel monitoring spreadsheet as 'extant' applications.</p>	<p>Identify relevant employment policies from the Fylde Local Plan (Incorporating Partial Review) (i.e. Strategic Policy EC1: Overall Provision of Employment Land and Existing Employment Sites) and existing employment sites.</p> <p>Run commitment and completion reports on a monthly basis to tie in with other monitoring tasks.</p> <p>Read through each report and extract relevant applications that are new or amend existing sites, add the application details to spreadsheet manually.</p> <p>Add to Excel monitoring spreadsheet.</p>	<p>Identify relevant employment policies from the Wyre Local Plan (includes Policies SP1, EP1, EP2, EP3, SA2, SA3, SA4, SA5 and SA7)</p> <p>Use Access Database to record new relevant planning consents on a monthly basis, for changes in the E(g)/B2/B8 Use Classes. Also record changes between the E(g)/B Use Classes</p>
Identify site sizes of new consented sites	<p>Site size (hectares) taken from the curtilage of the planning application. Additional floorspace developed, changes of use, etc. recorded from details provided in the planning application, cross checked against plans.</p>	<p>Site Size (hectares) taken from the curtilage of the planning application. Changes to existing floorspace, changes of use, etc., recorded from details provided in the planning application.</p>	<p>Site size (hectares) taken from the curtilage of the planning application. Additional floorspace developed, changes of use, etc. recorded from details provided in the planning application.</p>
Any limits on what is recorded?	<p>No limits on the sizes of consents recorded. Record both new development and redevelopments. Changes between the E(g)/B Use Classes recorded. Changes of use within Permitted Development Rights not recorded.</p>	<p>No limits on size of consents recorded. All new and changes to existing Employment Sites recorded. Also, development outside of the Strategic Policy EC1 Employment Allocations (including locations falling under Strategic Policy EC2 Employment Opportunities) recorded.</p>	<p>No limits on size of consents recorded. Record changes under Prior notifications, including changes on sites of sub-0.25 ha in size and changes between the E(g)/B Use Classes.</p> <p>Unable to record Permitted Development Rights.</p> <p>Sui Generis energy generation uses are recorded for the Hillhouse Enterprise Zone, where they are a key feature of development.</p>

Stage	Blackpool	Fylde	Wyre
Losses recorded?	Losses, both changes of use and redevelopments, monitored. Losses only counted as such, once completed. Losses not reported in Authority Monitoring Reports.	All losses are recorded but only losses where the site can never revert back to employment, i.e. lost to residential redevelopment/ refurbishment, are reported in the Authority Monitoring Report. Losses only counted once complete.	Record losses. Changes of use within the E(g)/B Use Classes recorded as both a loss and a gain. Losses only counted as such once new development completed.
Site visits and further updates to database	Undertake a desk study to find the status of the application as of 31 st March each year. This includes looking at building control records, council tax records, Google Maps/Streetview and phoning up applicants to determine whether an application has commenced or completed. If the application's status cannot be determined from the desk survey a site visit is undertaken.	Undertake a desk study to find the status of the application as of 31 st March each year. This includes looking at building control records, Google Maps/Street view. Checking the status of the Building Regulations application to see if the development has commenced. If it is not possible to find out the application's status from the desk survey a site visit is undertaken.	Undertake a desk study to find the status of the application as of 31 st March each year. This includes looking at building control records, Google Maps/Street view, website of company. Checking the status of the Building Regulations application to see if the development has commenced. If it is not possible to find out the application's status from the desk survey a site visit is undertaken. Site visits undertaken as required if building control records unable to record status e.g. change of use.
Add new planning history to database.	Applications decided in previous years that are listed on the extant sheet of the monitoring spreadsheet and are still valid are also surveyed to determine whether they have completed in the current monitoring year and whether they are to be included in the total figure published in the Authority Monitoring Report.	All data kept in an Excel spreadsheet including commitments (existing consents and sites under construction), completions and expired applications. As the status of the application changes the application is moved along through the worksheets. Completed applications (take up) are totalled to produce an overall figure that is used to report in the Authority Monitoring Report. .	Access Database updated. Monitor application progress, expired applications, completions. Initial data entered by a technical officer and records checked/updated by a planning officer.
Take up recorded	Recorded on completion. This process is undertaken in April each year following the start of the new financial year on April 1st and site visits normally take place in May of each year.	Recorded on completion and is confirmed via Building Control or site visit. This process is undertaken in April each year following the start of the new financial year on April 1 st and site visits would normally follow.	Take-up recorded on completion, i.e. when signed off by building control or a change of use is confirmed by a site visit by officer, via Google Streetview, business website information, etc. Undertake a desk study to find the status of the application as of 31 st March each year. This includes looking at building control records,

Stage	Blackpool	Fylde	Wyre
			<p>Google Maps/Street view, website of company. Checking the status of the Building Regulations application to see if the development has commenced. If cannot find out the application's status from the desk survey a site visit is undertaken.</p>
<p>Reporting</p>	<p>Authority Monitoring Report, monitors:</p> <ul style="list-style-type: none"> • Amount of existing industrial/business land within the defined main employment areas redeveloped for new Class E(g)(i), B2 and B8 uses (Redeveloped land includes brownfield sites and previously developed land). • Take-up of undeveloped, allocated industrial/business land for E(g)(i), B2 and B8 uses and amount of land available. • Number of vacant uses and non-employment uses on allocated employment sites. • Amount and percentage of new completed office development in Blackpool Town Centre. <p>Losses not recorded in the Authority Monitoring Reports.</p> <p>Also completed an Employment Land Update 2021 and Blackpool Airport Enterprise Zone Topic Paper (2022) using monitoring data.</p>	<p>Authority Monitoring Report, monitors:</p> <ul style="list-style-type: none"> • EC1 Overall Provision of employment land and existing employment sites. • Additional Employment Land that has received Planning Permission (EC2) • Employment Land Take Up from 2011 • Loss of Business use (ha) to residential use. <p>Also publish a Business and Industrial schedule which contains more data than the Authority Monitoring Report.</p>	<p>Employment Monitoring Report monitors:</p> <ul style="list-style-type: none"> • Available employment land, by area (ha) within employment site allocations • Take-up of employment land on employment allocations; existing employment areas; and windfall sites for use class E(g)(i)(ii)(iii), B2 and B8 by hectares and floorspace. • Employment commitments on employment allocations; existing employment areas; and windfall sites for use class E(g)(i)(ii)(iii), B2 and B8 by hectares and floorspace. • Amount of gross employment land (ha) and net floorspace (sqm) lost to alternative uses (non B use class) and loss between E (g)/B use class • Amount of gross employment land (ha) and net floorspace (sqm) committed to be lost through grant of planning permission to an alternative uses (non B use class) and loss between E (g)/B use class • Take-up on brownfield (PDL)/greenfield sites • Take-up percentage by employment sub-market – A6 corridor, rural area and urban peninsula. • Updated Employment supply for the plan period, to determine if the identified OAN is being met.

Stage	Blackpool	Fylde	Wyre
			The information is also presented in an Authority Monitoring Report.

Source: BBC, FBC, WBC, BE Group, 2024

8.100 Reflecting the above, and discussions with each local authority, following comments are given on how the Councils might achieve best practice in monitoring moving forward:

- *Measuring Sites* – It is recommended that the three authorities measure all sites themselves using GIS Systems rather than relying of figures for site areas provided in planning applications. BE Group has experienced elsewhere examples of significant calculated errors within the red line boundaries of planning applications, e.g. a farm building conversion to employment use of circa 100 sqm defined as being 1 ha of land take-up because the site boundary was drawn (and calculated) for the whole of the farm complex. Where a clear site boundary cannot be identified through GIS, etc. the alternative would be to use a standard floorspace to land conversion rate of 40 percent, i.e. an average hectare of land (10,000 sqm) would accommodate 4,000 sqm of gross floorspace with the other 60 percent used for access, parking, landscaping, etc.
- *Losses Monitoring* – All councils should monitor, and report on, losses of E(g)/B-Class land and premises to other uses to gain a complete picture of change in their local authority areas. All losses should be monitored. However, the priority should be to identify losses which result in structural changes to land and property. Many changes of use consents, or permitted development changes, only result in a change in occupier with no significant structural changes to the property, i.e. a gym occupying a light industrial unit. Such losses may only prove temporary as there is no physical barrier to the same property being reoccupied by another business under the old use. Losses monitoring could usefully therefore distinguish between ‘Structural’ and ‘Non-Structural’ losses.
- *Monitoring Completions/Losses in and Out of Employment Areas* – Monitoring should identify changes both inside and outside of defined employment areas. This allows the identification of areas of economic growth and decline, locations which are seeing significant changes of use and if existing Employment Area boundaries remain accurate.
- *Monitoring Changes within the E(g), B2, B8 Uses* – It is useful to monitor changes within the employment use classes, to understand how local property stock and business needs are changing. However, it should be recognised that changes within the E(g)/B-Class uses do not result in a net gain or loss of employment land.
- *Monitoring the Growth of Trade Uses* – It is also useful to monitor changes to, or developments for, trade uses. There is a growing demand for trade premises in existing industrial estates and proper monitoring of this use can help determine if a growing local trade sector is impacting on the availability of industrial and warehouse

premises locally and, if so, if protections in Policy might be advisable.

- *Monitoring Office Conversions* – A lot of office sector conversions are now permitted development, changes of use within the 'E' Use Class, and do not need full planning consent. However, development management planners will still be notified about many such changes of use in their daily work, Building Control will have still more information on physical changes while VOA data is also available to identify the sizes of commercial properties affected where no disclosure of size is made through other sources. A useful activity for monitoring office change would therefore be to develop a procedure for researching office stock losses across planning and Building Control databases, alongside secondary sources such as VOA, to create a single register and GIS mapping of losses. This will allow the Councils to better understand their office stock, and what types and quality levels of premises are being lost, thus what other office stock might be at risk in the future. Also, what types of stock might be required to be delivered elsewhere to address supply gaps.
- *Recording Changes of Use of Agricultural Buildings to B8 Storage* – Wyre in particular are seeing large numbers of small scale rural changes of use of agricultural buildings, to B8 storage. It would be useful to monitor these changes to provide a full picture of economic change locally, although it is accepted that this can be practically challenging, in terms of officer time and resources. Again, a link to Building Control records can be useful to identify relevant physical changes as well as clarity for development management officers that they should highlight relevant changes of use consents, etc. to monitoring officers.
- *Job Generation* – It would be appropriate for the authorities to record details of the job numbers associated with each development. It is accepted that for some speculative schemes, without a pre-agreed occupier, the job numbers given will be estimates only or absent from the application forms. Where there is such a data gap it could be filled using Homes England jobs density figures to work out likely employment numbers from the floorspace proposed (see HCA Employment Density Guide 3rd Edition (2015))⁶⁰. This data could be used in future to assess employment densities against differing B Use Classes, and whilst acknowledged as being only indicative, provide figures on job generation from schemes that could inform a wide range of economic and regeneration activities.

⁶⁰ Available at: https://www.kirklees.gov.uk/beta/planning-policy/pdf/examination/national-evidence/NE48_employment_density_guide_3rd_edition.pdf

- *Record details of Applicants/agents in Monitoring* – Holding this information is recommended, as it is valuable source for confirming ownership and identifying contacts for future site status checking.
- *Measure Details of Car Parking Provision* – This could allow proper calculation of the parking numbers businesses are seeking, allowing more responsive planning policy to be created.

8.101 Table 89 shows a more general good practice methodology for monitoring completions and losses.

Table 89 – Monitoring Process – Good Practice for Local Authorities

Stage	Practice
Identify new relevant planning permissions	Receive weekly report from development management or run query through development management databases. Exclude irrelevant applications.
Match with existing employment sites/create new sites in GIS	Search GIS database, add new site ID if required
Add new planning history to database. Also new site history for new sites	Update database fields to add new planning applications and create new sites. Site area is measured using GIS software, rather than relying on planning application.
Update starts and completions details	Weekly check of commencement list from Building Control. This should include reference to permitted development losses. Supported by regular site visits throughout the year (and prior to year end).
Remaining sites identified	Sort to identify remaining supply
Site visits and further updates to database	Site visits conducted 1-2 times a year. Database continually updated weekly
Produce reports on available sites/completions	Available Employment Sites Schedule, Authority Monitoring Report Inputs. Other reports as required. Clear, up to date data on the supply of employment land is key for a range of circumstances, including local plan reviews and providing evidence at planning appeals for refusing planning permissions for the loss of employment land (i.e., to demonstrate to inspectors how a site is important to meet the overall local plan supply).

Source: BE Group, 2024

SUMMARY

8.102 Two forecast models have been produced – Labour Demand (with Policy On for Fylde Borough, allowing for strategic projects at Blackpool Airport Enterprise Zone) and Past Take Up (with an allowance for losses of industrial and warehouse land and property to alternative, non E(g)/B-Class uses) – for the period of 2022-2042 for Blackpool, Fylde and Wyre. The outputs of the models are summarised in Tables 90 to 92.

Table 90 – Blackpool OAN Projections 2022-2042, ha

Sector	Labour Demand, Policy Off		Past Take Up
	Without a Deduction for Homeworking	With a Deduction for Homeworking	With an Adjusted for Industrial/warehouse Losses
Office (inc. Research and Development)	3.23	2.57	-
Industrial	-5.01	- 5.01	11.40 ⁶¹
Warehouse	1.18	1.18	
Total	-0.60	-1.26	11.40

Source: BE Group, 2023

⁶¹ It is assumed that future take up will be primarily/exclusively for industrial and warehouse uses, reflecting past completion trends since 2012/2013, as well as the private sector development proposed at this time

Table 91 - Fylde OAN Projections 2022-2042, ha

Sector	Labour Demand, Policy Off		Labour Demand, Policy On		Past Take Up
	Without Deduction for Homeworking ^a	With Deduction for Homeworking ^a	Without Deduction for Homeworking ^a	With Deduction for Homeworking ^a	With an Adjusted Deduction for Industrial/warehouse Losses
Office (inc. Research and Development)	4.36	2.98	12.24	8.34	-
Industrial	- 31.30	- 31.30	- 30.67	-30.67	16.60 ⁶²⁶³
Warehouse	1.26	1.26	1.92	1.92	
Total	-25.68	-27.06	-16.51	-20.41	16.60

Source: BE Group, 2023

Table 92 - Wyre OAN Projections 2022-2042, ha

Sector	Labour Demand, Policy Off		Past Take Up
	Without a Deduction for Homeworking ^a	With a Deduction for Homeworking ^a	With an Adjusted Deduction for Industrial/warehouse Losses
Office (inc. Research and Development)	3.00	2.21	2.61
Industrial	-4.91	- 4.91	9.41
Warehouse	0.61	0.61	9.38
Total	-1.30	-2.09	21.40

Source: BE Group, 2023

8.103 To the above figures a buffer of 3 years, or 15 percent, is added to allow for choice and potential change in needs during the Plan Period as well as accounting for exceptional further losses in the supply.

⁶² As noted in Paragraph 8.53, a split of past completions by use class is not available for Fylde. However, take up can be assumed to be primarily/exclusively industrial and warehouse based on past trends which have only seen a very limited delivery of new offices at Whitehills Business Park. New offices are only in the pipeline at Blackpool Airport Enterprise Zone, something accounted for in the Labour Demand, Policy On model.

⁶³ The split of Past Take Up OAN, by Use Class, reflects patterns in recorded completions and losses since 2011/2012.

8.104 In terms of the preferred **Office OAN** experience suggests that the quantum of office space required by businesses is strongly driven by the number of staff they have to accommodate. This differs from the industrial and warehouse markets where space requirements are likely to reflect the number and scale of production processes which need to be housed, and/or the amount of parts and finished goods which need to be stored, rather than staffing numbers. Thus, the jobs-based Labour Demand model is likely to best project office sector needs moving forward. As the majority of projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward. As homeworking/hybrid working remains a key feature of business activities, Labour Demand models net of homeworking are more realistic at this time. By local authority area, the recommended office sector OANs are shown below. **All figures include a 15 percent buffer for flexibility and choice:**

- **Blackpool – 2.96 ha**
- **Fylde – 9.59 ha.** Here the Policy On forecast is recommended as providing the most complete picture of employment change in the Borough, and particularly accounting for the Knowledge Quarter, Blackpool Airport Enterprise Zone, the largest office development likely on the Fylde Coast to 2042
- **Wyre – 2.54 ha.**

8.105 In terms of a preferred OAN model for the **industrial and warehouse sector**, requirements for industrial and warehouse premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker. Industrial and warehouse companies are also more likely to acquire and hold onto expansion land and premises, even in times of contraction in the business, than office sector companies, in anticipation of future growth. This results in a weaker link to the jobs-based Labour Demand modelling that was true for offices. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector, across the Fylde Coast, which is at odds with identified market demand and the almost exclusively industrial pipeline of development identified on local employment sites.

8.106 Therefore the Past Take Up model is recommended as it is independent of jobs change projections and based on real world trends. It accounts for periods of growth and recession in the local economy, allowing that such economic growth and decline will continue to 2042. It is thus likely to be better in tune with real market demand than the Labour Demand model. By local authority area, the recommended industrial/warehouse sector OANs are shown below. Where possible an allowance has been made for any office based take up which may have been included in the model data and would lead to double counting with the Office OAN model above, although the specific approach used on this matter depends on the monitoring data available from each local authority.

All figures include a 15 percent buffer for flexibility and choice:

- **Blackpool – 13.11 ha.** N.B. The past take up this projection is based on has exclusively comprised the completion of industrial and warehouse uses
- **Fylde – 19.09 ha.** N.B. As noted in Paragraph 8.53, a split of past completions by use class is not available for Fylde. However, take up can be assumed to be primarily industrial and warehouse based on past trends which have only seen a very limited delivery of new offices at Whitehills Business Park.
- **Wyre – 21.61 ha.** N.B. Here a deduction of 12.21 percent is made to allow for the percentage of take up which is likely to be office based, reflecting past completion trends since 2011/2012. This deduction is made to avoid double counting with the preferred office OAN forecasting model, noted above.

8.107 How the preferred OAN figures are derived is summarised in Table 93.

Table 93 – Preferred OAN Summary

Sector	Base Requirement	Addition – Displacement	Addition – Buffer (15 Percent Uplift)	Final OAN
Blackpool				
Office (inc. R&D) <i>(Need based on Labour Demand, Policy Off)</i>	2.57 <i>(From FTE Jobs Growth, with a 20.2 percent reduction for homeworking)</i>	N/A	+0.39	2.96
Industrial/Warehouse <i>(Need based on Past Take Up, with an adjustment for industrial/warehouse losses)</i>	11.40 <i>(0.57 ha/year x 20)</i>	N/A	+1.71	13.11
Total	13.97	-	+2.10	16.07
Fylde				
Office (inc. R&D) <i>(Need Based on Labour Demand, Policy On)</i>	8.34 <i>(From FTE Jobs Growth, with a 31.8 percent reduction for homeworking)</i>	N/A	+1.25	9.59
Industrial/Warehouse <i>(Need based on Past Take Up, with an adjustment for industrial/warehouse losses)</i>	16.60 <i>(0.83 ha/year x 20)</i>	N/A	+2.49	19.09
Total	24.94	-	+3.74	28.68
Wyre				
Office (inc. R&D) <i>(Need Based on Labour Demand, Policy Off)</i>	2.21 <i>(From FTE Jobs Growth, with a 26.1 percent reduction for homeworking)</i>	N/A	+0.33	2.54
Industrial/Warehouse <i>(Need based on Past Take Up, with an adjustment for industrial/warehouse losses)</i>	18.79 <i>(1.07 ha/year x 20 = 21.4 ha. Less 12.21 percent) (A reduction of 12.21 percent is made to allow for the percentage of take up which is likely to be office based, to avoid double counting with the office OAN forecasting model.)</i>	N/A	+2.82	21.61
Total	21.00	-	+3.15	24.15

Source: BE Group, 2024

8.108 Combining the office, industrial and warehouse requirements gives an OAN for the Fylde Coast, to 2042 of **68.90 ha**, comprising:

- **Blackpool: 16.07 ha**
- **Fylde: 28.68 ha**
- **Wyre: 24.15 ha.**

8.109 Section 7.0 identifies a realistic 2023 land supply scenario of 104.65 ha across the Fylde Coast, comprising:

- Blackpool: 12.96 ha supply
- Fylde: 56.61 ha supply
- Wyre: 35.08 ha supply (27.40 ha as a worst case scenario).

8.110 Thus, to 2042, Blackpool has a supply shortfall of **3.11 ha** while Fylde has a surplus of **27.93 ha**. Wyre also has a more modest surplus of **3.25-10.93 ha**.

8.111 The monitoring processes of each local authority have been reviewed and best practice recommendations given on:

- *Measuring Sites* – Use GIS, where possible, rather than relying on application data to identify site areas.
- *Losses Monitoring* – All councils should monitor, and report on, losses of E(g)/B-Class land and premises to other uses, with a focus on losses involving structural changes to property rather than just changes of business occupier.
- *Monitoring Completions/Losses in and Out of Employment Areas* – Monitoring should identify changes both inside and outside of defined employment areas.
- *Monitoring Changes within the E(g), B2, B8 Uses* – It is useful to monitor changes within the employment use classes, to understand how local property stock and business needs are changing. However, it should be recognised that changes within the E(g)/B-Class uses do not result in a net gain or loss of employment land.
- *Monitoring the Growth of Trade Uses* – It is also useful to monitor changes to, or developments for, trade uses which are a growing component of industrial estates.
- *Monitoring Office Conversions* –. Look to record changes under Permitted Development Rights, where possible.
- *Recording Changes of Use of Agricultural Buildings to B8 Storage* – It is useful to monitor these changes to provide a full picture of economic change locally.
- *Job Generation* – It would be appropriate for the authorities to record details of the job numbers associated with each development.
- *Record details of Applicants/agents in Monitoring* – These are valuable source for confirming ownership and identifying contacts for future site status checking.
- *Measure Details of Car Parking Provision* – This could allow proper calculation of the parking numbers businesses are seeking, allowing more responsive planning policy to be created.

9.0 FURTHER GROWTH OPPORTUNITIES – POTENTIAL FUTURE EMPLOYMENT LAND SUPPLY

INTRODUCTION

9.1 This section considers other employment opportunity sites which could be assessed in the Local Plans of the Fylde Coast Local Authorities, as required and as judged appropriate by other planning factors, to meet the needs identified in Section 8.0. Any such provision would be additional to the realistic supply of existing employment land identified in Section 6.0. For Fylde, the five sites identified would have to be assessed against any other sites submitted via a Call for Sites, which may be more suitable for employment development.

9.2 The Further Growth Opportunities comprise:

- **Blackpool** – No further sites identified. A review of the available brownfield land in Blackpool’s Employment Areas was undertaken in Section 7.0.
- **Fylde** – Fylde Council have identified five sites pursued by stakeholders at the 2017 EIP for the Fylde Local Plan to 2032 (2021) but not ultimately adopted in the Plan, for consideration as further growth opportunities. It should be noted that, moving forward, Fylde Council will undertake a Call for sites exercise and, any employment site options identified in that exercise would be assessed against the five already submitted in 2017. What land could be taken up would also depend on whether a review of Green Belt was also undertaken as part of the Local Plan development process.
- **Wyre** – Wyre Council have identified 21 sites put forward in two Call for Sites exercises in 2022 and 2023 for employment uses, or for a range of mixed uses including housing. The Council is not reviewing its Green Belt, therefore sites put forward through Call for Sites that are within Green Belt have not been considered.

ASSESSMENT

9.3 The 26 relevant sites were appraised against their high-level constraints (accessibility, stated physical issues, etc.) informed by the Councils’ own analyses of site constraints and representations made to EIP (for Fylde) or Call for Sites’ exercises (for Wyre); their ‘fit’ with identified market demand/ability to fill a defined supply gap and potential ability to deliver premises within the 2022-2042 Local Plan period. Based on how well the site performs against these criteria, it is graded A-E. Grades, and resulting recommendations

are set out in Table 94. The results of the site review are outlined in Table 95. The sites are mapped in Appendix 10 and 11.

Table 94 – Grades A to E Definitions

Grade	Definition	Recommendation
A+	<p>Site has no large-scale constraints</p> <p>It is well placed, and of a size, to meet <i>strategic</i> demand and attract inward investment</p> <p>Site is in developer control, or has other strong indications of deliverability early in the Plan Period</p>	<p>Subject to other considerations, site represents a strong candidate for inclusion in the Local Plan to meet strategic needs for E(g)/B2/B8 uses, and attract inward investment</p>
A-	<p>Site has some, possibly significant constraints, although these can potentially be overcome with investment</p> <p>It is well placed, and of a size, to meet <i>strategic</i> demand and attract inward investment</p> <p>Site is in developer control, or has other strong indications of deliverability in the Plan Period</p>	<p>Constraints raise some questions over deliverability but there remains a way forward to development if certain issues can be addressed.</p> <p>Subject to other considerations, site represents a strong candidate for inclusion in the Local Plan to meet strategic needs for E(g)/B2/B8 uses, and attract inward investment</p>
B+	<p>Site has no large-scale constraints</p> <p>It is well placed, and of a size, to meet <i>local</i> demand</p> <p>It meets defined market needs in a relevant geographic area</p> <p>Site is in developer control, or has other indications of deliverability early in the Plan Period</p>	<p>Subject to other considerations, site represents a strong candidate for inclusion in the Local Plan to meet local needs for E(g)/B2/B8 uses</p>
B-	<p>Site has some, possibly significant constraints, although these can be overcome with investment</p> <p>It is well placed, and of a size, to meet <i>local</i> demand</p> <p>It meets defined market needs in a relevant geographic area</p> <p>Site is in developer control, or has other indications of deliverability early in the Plan Period</p>	<p>Constraints raise some questions over deliverability but there remains a way forward to development if certain issues can be addressed.</p> <p>Subject to other considerations, site represents a strong candidate for inclusion in the Local Plan to meet local needs for E(g)/B2/B8 uses</p>
C	<p>Few/moderate site constraints</p> <p>Site could meet some local demand but:</p> <ol style="list-style-type: none"> 1. Delivery of employment uses would be dependent on development of additional uses, likely housing, in a mixed-use scheme, or 2. Size and position mean that it is most likely to support the growth/relocation of a single firm or rural infill development. 	<p>Consider for allocation to meet local needs. However:</p> <ol style="list-style-type: none"> 1. If tied to a mixed-use scheme, confirmation that the wider development package is acceptable and deliverable, is required 2. If take up tied to a single firm/rural diversification, it may be preferable to review applications for growth of that firm on a case by case basis through the planning system
D	<p>Site constraints</p> <p>What demand exists primarily for lower value uses – waste, open storage, etc. or for non E(g)/B Class uses</p> <p>Conversely, higher demand but likely insufficient to overcome site constraints.</p> <p>Moderate evidence that B-Class uses would be deliverable here in Local Plan Period</p>	<p>Low priority for E(g)/B-Class allocation. Subject to further review may suit other uses.</p>
E	<p>Significant site constraints</p> <p>Location and size offer negligible scope for meeting local demand or supply gaps</p> <p>Significant barriers to delivery</p>	<p>Do not allocate for E(g)/B2/B8 uses.</p>

Source: BE Group, 2023

Table 95 – Site Review Summaries

Ref	Site Name/ Address	Site Description	Size, ha	Proposed Use(s)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
Fylde								
N/A	Blackpool Airport Enterprise Zone - Zone B	Land comprises Airport runways, taxiways and surrounding grassland, south of the main Blackpool Airport buildings, off Squires Gate Lane.	Up to 34.60	Employment	<ul style="list-style-type: none"> • Much of the land falls into Green Belt • In use for Airport infrastructure • Constrained access through Airport from Squires Gate Lane 	<p>The wider Blackpool Airport Enterprise Zone has been a focus for market activity in the Fylde Coast, for industrial and warehouse uses, most notably at Blackpool Business Park. The location, along with Whitehills, is expected to continue to be a focus for activity meeting ongoing demand for smaller and mid-sized industrial/warehouse units, which are identified as being in short supply by stakeholders.</p> <p>The Knowledge Quarter scheme, discussed further in Section 7.0, is also expected to represent the most significant investment in office accommodation on the Fylde Coast over the next Local Plan period, meeting local needs and competing for inward investment windfall enquiries with other schemes across Lancashire and the North West.</p>	<p>Present plans, supported by public sector partners, will see the main Airport facilities, off Squires Gate Lane redeveloped for the Knowledge Quarter. Aviation uses would then be relocated south partly into Zone B to form the Aviation Quarter. Expansion/consolidation of Airport uses south has already commenced with hybrid consent now being sought for the construction of new access roads, existing highways improvement works and drainage works (full consent sought) and an outline planning application for the construction of five hangars, a (E(g)/B2) commercial unit and car parking (App. No. 23/0589). Delivery of the Aviation Quarter could result in an intensification of uses in the Green Belt and may require some changes to boundaries in the next Local Plan. This will be clarified further in a new Enterprise Zone Masterplan, presently under development.</p> <p>It is unclear if these changes will generate any new employment land however, with the Aviation Quarter being for specialist aviation uses only and development mostly comprising hangars rather the general E(g), B2, B8 premises. This would be particularly true if the bulk of the Aviation Quarter is taken up by the relocation of existing uses south from the current Airport complex.</p>	N/A (At the time of writing it is unclear if proposals here will generate additional employment land within Fylde Borough)
N/A	Great Birchwood, Lytham Road, Warton	Former country park, with vacant and derelict leisure and camping facilities off the A584 Lytham Road, in an out of settlement location.	8.32	-	<ul style="list-style-type: none"> • Derelict structures on site • Protected Trees onsite (Great Birch Wood adjacent) • Pond onsite • In Green Belt 	<p>Although in a secondary location compared to the M55 Corridor area, the site still enjoys a strong overall position off the A584 with direct access to the main settlements of Fylde Borough. The creation of Junction 2, M55 also gives the site improved access to the Motorway, via A-Roads.</p> <p>A development of industrial and/or warehouse units here would likely attract reasonable local demand, reflecting the identified shortages of such premises across the Fylde Coast.</p> <p>Consent was sought, in 2023, for 30 residential units (App. No. 21/1110). That application was withdrawn in October 2023. However, the site is owned by Fylde Coast Care Village, and it is assumed the landowner</p>	<p>Brownfield site in a reasonable position off the A584. Assuming development could be supported on such a Green Belt site, it could provide a local industrial/warehouse site, serving the main settlements of Fylde Borough. However, based on the recent withdrawn planning application it is assumed that landowner aspirations are for residential uses.</p>	D

Ref	Site Name/ Address	Site Description	Size, ha	Proposed Use(s)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
N/A	Land North of Lytham Road Roundabout, Warton	Greenfield agricultural land, located off the A584, north west of the A584 Lytham Road/Nectar Drive roundabout, at the edge of the Warton Settlement Area	2.23	Originally proposed for a local retail and services centre	<ul style="list-style-type: none"> Trees onsite Housing (including residential caravan park) adjacent 	<p>aspiration remains for residential, or related care facilities.</p> <p>Although in a secondary location compared to the M55 Corridor area, the site still enjoys a strong overall position off the A584. Although stakeholders did not identify a specific need for premises in Warton/Freckleton, a development here would have good access to all the main settlements of Fylde Borough. A development of industrial and/or warehouse units here would likely attract reasonable local demand, reflecting the identified shortages of such premises across the Fylde Coast.</p> <p>With regards to the previous aspiration for a local centre here, it is noted that land on the opposite side of the A584 Lytham Road now has Full Consent for a retail unit and drive through coffee shop (App. No. 21/1075).</p>	If required and subject to landowner interest, this site could provide a modest local scale employment site, meeting local needs in the main settlements of Fylde Borough. Development would be subject to appropriate buffering with adjacent housing and an agreed access onto the A585 Lytham Road, possibly via Nectar Drive to the east.	B-
N/A	Land at Peel Hill	Large area of greenfield agricultural land, located south east of Junction 4, M55 and east of Whitehills Business Park and with frontage on the A583 Preston New Road, albeit mostly to the rear of housing and a caravan park.	Up to 24.50 (based on past submission)	Previous Local Plan representations were for 16ha of residential, 5ha employment, a 1.5 ha primary school and neighbourhood centre, and 2ha of open space. Discussions with land promoters suggest majority employment scheme could now be pursued, with housing and mixed-use as alternatives.	<ul style="list-style-type: none"> Trees onsite Housing (including caravan parks) adjacent Electricity pylons on the eastern edge of the site The site drops in level from west to east, with Peel Hill being the summit of a small hill and a watershed. The most easterly part of the site adjacent to the M55 is regularly flooded, drainage is an issue. The change in levels means the site is very prominent in the landscape. Landscaped buffer zones would need to be provided to screen it from the open countryside to the east. 	<p>Site is located in the M55 Corridor area, immediately off Junction 4, close to Whitehills Business Park and the A583 Preston New Road. The M55 Corridor is identified by stakeholders as a focus for industrial and warehouse demand on the Fylde Coast, particularly for sub 500 sqm units and larger grow-on accommodation. Whitehills has been a focus for E(g)/B-Class development in Fylde Borough over the last decade with plans for light industrial development being pursued on several allocated sites here and larger premises likely on nearby Whyndyke Farm. Peel Hill could thus be taken forward as a further long term growth option for this core market area, if needed.</p>	<p>The Strategic Land Group have a 20 year promotion agreement with the landowners and will continue to promote the site for housing, mixed use and full employment through the Local Plan process.</p> <p>In terms of employment uses, The Strategic Land Group have identified demand either for mid-sized B8 warehousing or smaller workspace aimed at the Fylde Coast market. Good interest from housebuilders is also reported.</p> <p>The Strategic Land Group would work with the Council to secure an allocation for the site, be it for housing, employment or mixed use and then work to secure a planning consent. The site would then be sold to developers. Reasonable demand for this is seen as likely given the prominent location of the land.</p> <p>The main barrier to delivery would be road access, with much of the A583 frontage blocked by residential uses. The Strategic Land Group propose that access would be off the Preston New Road Roundabout, with a fourth arm added. It has consulted with LCC Highways who did not indicate any material issues with this approach and noted that capacity exists at the junction. It is assumed the drainage, viability and levelling issues could be addressed through an appropriate design.</p>	A-
N/A	Corner Hall (Cornah Hall) Farm, Fleetwood Road, Greenhalgh-with-Thistleton	Large area of greenfield agricultural land, extending west from Junction 3, M55. Frontage to the A585 Fleetwood Road in the east is largely	Up to 16.36	Employment	<ul style="list-style-type: none"> Trees onsite Ponds onsite Existing farm buildings onsite 	<p>Site is located in the M55 Corridor area, immediately off Junction 3, with access to Kirkham/Wesham via the A585 Fleetwood Road. The M55</p>	<p>The site has the potential to build on the growing offer of premises at the main M55 Junctions. The full 16 ha site would be a substantial</p>	B-

Ref	Site Name/ Address	Site Description	Size, ha	Proposed Use(s)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
		blocked by the Villa Express Hotel and pub/restaurant.			<ul style="list-style-type: none"> Housing (and hotel) adjacent 	<p>Corridor is identified by stakeholders as a focus for industrial and warehouse demand on the Fylde Coast, particularly for sub 500 sqm units and larger grow-on accommodation. Demand is more focused on the western end of the M55, linked to Whitehills and the Blackpool Airport Enterprise Zone, but interest along the full length of the M55 Corridor is reported.</p> <p>A development here would build on the growing critical mass of employment uses off the A585, north of Wesham, including Laleham Health and Beauty and the expanding Mill Farm, as well as a number of established Employment Areas in Kirkham/Wesham.</p>	<p>development in the countryside, however, and smaller site focused in the east might be preferable.</p> <p>A key constraint would be access, with much of the A585 frontage blocked by the hotel. Existing accesses include the Corner Hall access road which links almost directly onto the Junction 3 roundabout and Bradshaw Lane in the south which is narrow and may not support further HGV traffic.</p>	
Wyre								
CFS_2022_008	Land east of Cartmell Lane, Nateby	Greenfield agricultural land, immediately north of the Nateby settlement area and just over 1 km west of the A6 and Garstang	5.00	Employment, leisure and housing	<ul style="list-style-type: none"> Trees onsite Pond onsite Housing and school adjacent Would require additional water treatment facilities Access roads narrow in places, especially Cartmell Lane In the impact area for a Shell Pipeline 	<p>Site is largely separate from the core A6 Corridor market area and any development here would most likely serve the rural economy where demand is primarily for smaller industrial units of sub-500 sqm each. The relative isolation of the plot would make it a low priority for many business investors, especially if already allocated employment sites in Garstang and Catterall can be brought forward</p>	<p>Development here would represent a significant expansion of the Nateby settlement area, and it is questionable if local roads could support increased HGV activity. These points combined with the relative isolation of the plot would make it a low priority for business and developer investment.</p>	D
CFS_2022_009	Stannah Substation, River Road	Rectangular area of brownfield land, comprising hardstanding and scrubland, partly occupied by energy transmission infrastructure, adjoining housing and a caravan park.	4.95	Housing, employment, leisure, commercial, gypsies and travellers and travelling showpeople; renewable, community and low carbon energy; nature recovery/ biodiversity net gain; and natural flood management.	<ul style="list-style-type: none"> Active energy transmission infrastructure spread across the site Falls into Flood Zones 2 and 3 Accessed via residential roads, narrow in places Trees onsite. 	<p>Site is close to the Hillhouse Enterprise Zone Hillhouse is seeing good demand from local businesses for industrial and warehouse space plus more strategic investment into energy generation infrastructure.</p>	<p>The energy generation infrastructure, which it is understood needs to be retained, is spread across the site, with transmission wires crossing areas of unused land. This represents a very significant barrier to development. Other barriers include flood risk and the existing access which is narrow and through residential areas. It may be possible to deliver more energy generation infrastructure here, linked to plans at Hillhouse but development of basic E(g)/B-Class uses here would be challenging.</p>	E
CFS_2022_030	Land south of Snapewood Lane, Cabus, PR3 0JP	Area of greenfield agricultural land, plus one dwelling, accessed via narrow rural road, west of the A6 and North West of Garstang.	4.10	Housing, retail, employment, leisure, commercial, or new medical facilities as part of a mixed development: <i>"Site could accommodate (in part or whole) new medical facilities (such as a new hospital / medical centre / NHS hub), or form part of a mixed development (housing, employment, community facilities, retailing, sport and leisure) as part of the development of the wider parcel which our client's land forms part of."</i>	<ul style="list-style-type: none"> Access is from Snapewood Lane, a very narrow rural road Falls into an Area of Separation for settlements Trees onsite Housing on site and adjacent 	<p>Site links to the A6 Corridor and particularly the Garstang/Catterall area which is a focus for demand for industrial and warehouse space, with schemes for light industrial accommodation being progressed and larger local businesses seeking growth land and premises.</p>	<p>Site links to the active A6 Corridor but Snapewood Lane is too narrow to support HGV traffic. Thus E(g)/B-Class uses do not appear deliverable here without considerable investment in infrastructure.</p>	D

Ref	Site Name/ Address	Site Description	Size, ha	Proposed Use(s)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
CFS_2022_032	Land Off Shard Lane, Hambleton, FY6 9DD	Large area of greenfield agricultural land south of the A588.Bull Park Lane Junction	11.00	Housing, employment	<ul style="list-style-type: none"> Trees onsite Pond onsite Farms adjacent Northern extent of site falls into Flood Zones 2 and 3 Public rights of way pass through site 	Site enjoys a reasonable position on the strategic road network but falls into the rural area east and north of the River Wyre. Stakeholders don't identify this area as a focus for demand, while existing employment locally is limited to a couple of very small industrial schemes or solus business sites.	Flood risk would be the main barrier to delivery here and it would need to be clarified that existing flood defences on the River Wyre are sufficient to allow a large scale development. Site is in a rural location, albeit with good road access, and would likely be a low priority for developers compared to options closer to the M55 or A6 Corridors.	D
CFS_2022_033	Land Off Marsh Lane, Hambleton, FY6 9AW	Large area of greenfield agricultural land south of Hambleton and east of the A588	26.00	Housing, employment	<ul style="list-style-type: none"> Trees onsite Pond onsite Farms, hotel adjacent Falls into Flood Zones 2 and 3 In Critical Drainage Zone Public rights of way pass through site 	Site enjoys a reasonable position on the strategic road network but falls into the rural area east and north of the River Wyre. Stakeholders don't identify this area as a focus for demand, while existing employment locally is limited to a couple of very small industrial schemes or solus business sites.	It is first assumed that any development here, on a site of this size would be mixed use and housing led. It would therefore first need to be agreed that the site is suitable for housing. In terms of employment uses, flood risk would be the main barrier to delivery here and it would need to be clarified that this can be mitigated to allow a large scale development. Site links to Hambleton and might meet some immediate local needs. However, more generally, land east and north of the River Wyre would likely be a low priority for developers compared to options closer to the M55 or A6 Corridors.	D
CFS_2022_036	Westfield Farm, Claughton on Brock, Garstang, PR3 0PU	Greenfield agricultural land, surrounding a large farm, fronting the A6, adjacent to Catterall.	17.00	Housing, employment, retail, commercial An Outline Planning application for a retirement village of 200 assisted living residential dwellings was refused and subsequently dismissed at appeal (App. No. 17/00743/OULMAJ). The refusal primarily related to the out of settlement nature of the site and its unsustainable location and distance from services for the proposed use and visual impact	<ul style="list-style-type: none"> Trees onsite Farm onsite, others adjacent Westfield Farmhouse is a Grade II Listed Building, Watercourse, Yoed Pool, passes through the site CADENT (Major Accident Hazard) pipeline in area 	Site enjoys a strong location on the A6 Corridor, across the A6 from the large Brockholes Employment Area, where businesses are seeking growth. It is also across the A6 from site SA2/3 South of Goose Lane, Catterall where consent for a light industrial scheme has recently been secured. The A6 Corridor and particularly the Garstang/Catterall area is a focus for demand for industrial and warehouse space, with schemes for light industrial accommodation being progressed and larger local businesses seeking growth land and premises	Site has some constraints, but it is likely that these can be mitigated. This is a strong location for further employment uses, building on its direct A6 access and the critical mass of existing business premises of nearby Brockholes. However, landowner interest in E(g)/B-Class used would need to be confirmed given the previous refused application for residential uses here, and the fact that stated market interest for the site has been from housebuilders.	B-
CFS_2022_040	Riverside Industrial Park, Tan Yard Road, Catterall, Preston, Lancashire, PR3 0HP	Greenfield agricultural land, bounded by the Catterall settlement area to the south and the River Calder to the north, to the north east of Collinson's	4.50	Employment	<ul style="list-style-type: none"> Housing adjacent Trees onsite Constrained access through the secure Collinson facility Public Right of Way passes through the site Site mostly falls into Flood Zone 3 with the remainder in Flood Zone 2 Restrictive covenants on the site which limit development to offices 	Site enjoys a strong location on the A6 Corridor, linked to the active Collinson business. It falls into the backlands, behind existing company facilities however, it is only accessible via Collinson's secure facility. The A6 Corridor and particularly the Garstang/Catterall area is a focus for demand for industrial and warehouse space. However, it is understood development here would be limited to offices for which little demand is reported away from established office centres such as Whitehills and there is particularly limited demand for larger self-contained office units. Collinson have consent for one modular office in the west of the site	Site is in a strong location generally, but falls into the backlands, is constrained by flood risk and development here is understood to be limited to offices. As noted in this Study, demand for offices, beyond some small serviced suites, is limited at present, with viability issues making development almost impossible without cross funding from other uses or other forms of financial support. Given these constraints and the lack of a plan for development, beyond what has already been consented for Collinson's own use, there is limited evidence of deliverability here.	D

Ref	Site Name/ Address	Site Description	Size, ha	Proposed Use(s)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						(App. No. 20/00639/FULMAJ). If developed this will meet Collinson's own needs. The rest of the site could be developed for other offices, but Collinson are not sure what demand exists for this and have no plans to deliver this themselves.		
CFS_2022_041	Land Off Shard Lane, Hambleton, FY6 9BX	Irregularly shaped area of greenfield agricultural land, off the A588, with roadside services to the north east and housing to the south.	3.03	Housing, employment, retail, commercial	<ul style="list-style-type: none"> Established hedgerows on the site Falls into Flood Zones 2 and 3 In Critical Drainage Zone 	Site enjoys a reasonable position on the strategic road network but falls into the rural area east and north of the River Wyre. Stakeholders don't identify this area as a focus for demand, while existing employment locally is limited to a couple of very small industrial schemes or solus business sites.	Flood risk would be the main barrier to delivery here and it would need to be clarified that this can be mitigated to allow a large scale development. Site is in a rural location, albeit with good road access, and would likely be a low priority for developers compared to options closer to the M55 or A6 Corridors.	D
CFS_2022_048	Land south of Fouldrey Avenue, Poulton-le-Fylde	Site comprises a large greenhouse food production facility, occupied by Ingle's Dawndew Salad, bounded by greenfield land.	9.16	Housing, employment, retail, commercial, leisure, nature recovery/ biodiversity net gain, natural flood management.	<ul style="list-style-type: none"> Trees onsite Falls into Flood Zones 2 and 3 Public Right of Way runs along eastern/northern boundary House within the site Accessed via residential roads 	Two-thirds of site is within the Poulton-le-Fylde settlement and the remaining part in the countryside area. Site falls into Poulton-le-Fylde which is a focus of demand for industrial and warehouse uses, including sub-500 sqm units as well as space to accommodate larger firms. It will benefit from improvements to the A585. However, the site is distant from the major Poulton Industrial Estate, the focus for market activity locally	Flood risk would be the main barrier to delivery here and it would need to be clarified that this can be mitigated to allow a large scale development. Site is mainly in a key settlement for Wyre but falls into backlands, would require extension in countryside and is accessed via residential roads. Thus, for employment uses at least, it will be of lower interest to developers than sites closer to Poulton Industrial Estate or with more immediate A585 access.	D
CFS_2022_068	Land around Parrox Hall, Preesall, FY6 0JU	Large greenfield site, to the rear of housing, mostly comprising agricultural land plus Parrox Hall and another large farm.	28.00	Housing, employment, retail, leisure, within a mixed-use scheme	<ul style="list-style-type: none"> Trees onsite Ponds onsite Falls into Flood Zones 2 and 3 Public Rights of Way cross the site Parrox Hall is Grade II* Listed 	Site falls into the rural area east and north of the River Wyre. Stakeholders don't identify this area as a focus for demand, while existing employment locally is limited to a couple of very small industrial schemes or solus business sites.	It is first assumed that any development here, on a site of this size would be mixed use and housing led. It would therefore first need to be agreed that the site is suitable for housing. In terms of employment uses, flood risk would be the main barrier to delivery here and it would need to be clarified that this can be mitigated to allow a large scale development. Site links to Preesall/Knott End and might meet some immediate local needs. However, more generally, land east and north of the River Wyre would likely be a low priority for developers compared to options closer to the M55 or A6 Corridors.	D
CFS_2022_069	Land around Hackensall Road, Knott End-on-Sea, FY6 0JU	Greenfield agricultural land, to the rear of housing, accessed by residential roads.	10.70	Housing, employment, retail, leisure, within a mixed-use scheme	<ul style="list-style-type: none"> Ponds onsite Falls into Flood Zones 2 and 3 Access is via residential roads 	Site falls into the rural area east and north of the River Wyre. Stakeholders don't identify this area as a focus for demand, while existing employment locally is limited to a couple of very small industrial schemes or solus business sites.	It is first assumed that any development here, on a site of this size would be mixed use and housing led. It would therefore first need to be agreed that the site is suitable for housing. In terms of employment uses, flood risk would be the main barrier to delivery here and it would need to be clarified that this can be mitigated to allow a large scale development. Site links to Preesall/Knott End and might meet some immediate local needs. However, more generally, land east and north of the River Wyre would likely be a low priority for developers	D

Ref	Site Name/ Address	Site Description	Size, ha	Proposed Use(s)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
							compared to options closer to the M55 or A6 Corridors.	
CFS_2022_070	Land around Green Lane Farm, Preesall	Greenfield agricultural land, accessed off a residential road, fronted by an agricultural barn, in a rural area.	4.70	Housing, employment, retail, leisure	<ul style="list-style-type: none"> Trees onsite Falls into Flood Zones 2 and 3 House adjacent 	Site falls into the rural area east and north of the River Wyre. Stakeholders don't identify this area as a focus for demand, while existing employment locally is limited to a couple of very small industrial schemes or solus business sites.	In terms of employment uses, flood risk would be the main barrier to delivery here and it would need to be clarified that this can be mitigated to allow a large scale development. Site links to Preesall/Knott End and might meet some immediate local needs. However, more generally, land east and north of the River Wyre would likely be a low priority for developers compared to options closer to the M55 or A6 Corridors.	D
CFS_2023_078	Old Holly Farm, Cabus, Preston, PR3 1AA	Greenfield agricultural land, fronting the A6 Preston Lancaster Road, north of Cabus.	3.49	Employment	<ul style="list-style-type: none"> Trees onsite 	The site enjoys a reasonable position on the A6, albeit in a rural area. The A6 Corridor and particularly the Garstang/Catterall area is a focus for demand for industrial and warehouse space, with schemes for light industrial accommodation being progressed and larger local businesses seeking growth land and premises. This location may also see demand for roadside services and trade uses.	Largely unconstrained area of land. It is unclear if this site is being promoted as part of a larger mixed-use scheme and if so, all components of that scheme will need to be reviewed. However, viewed individually this site is likely to attract interest from businesses seeking land with an A6 position, even if sites closer to Garstang/Catterall would be preferable.	B+
CFS_2023_079	Land to the East side of Sowerby Road, Preston, PR3 0TU	Irregularly shaped area of greenfield agricultural land, accessed by rural roads distant from key settlements.	16.19	Housing, employment, leisure, commercial, renewable, community and low carbon energy and nature recovery/ biodiversity net gain.	<ul style="list-style-type: none"> Accessed via rural roads Majority of site falls into Flood Zones 2 and 3. 	Rural site, distant from the foci of economic demand, including the A6 and M55 Corridors. Market demand could support the delivery of some light industrial uses anywhere in Wyre, but there is unlikely to be interest for such a large site in such an isolated location.	Rural site. Deliverability would be limited by the isolated position of the land and the narrow nature of Sowerby Road, as well as flood risk. The site would not suit employment uses and may not support other large scale development options.	D
CFS_2023_081	Sowerby Lodge, Sowerby Hall Farm, St Michaels, Preston, PR3 0TU	Various agricultural barns, tanks and a house, associated with Sowerby Hall Farm, accessed by rural roads distant from key settlements.	1.50	Housing, employment, commercial	<ul style="list-style-type: none"> Accessed via rural roads Site appears in full use at present Trees onsite Possible contamination from farm uses Small part of north east of site fall within Flood Zone 2 	Rural site, distant from the foci of economic demand, including the A6 and M55 Corridors. A smaller site, however, this location may support rural demand and agricultural diversification. In this regard it should be noted that there is demand for light industrial space across Wyre Borough.	Links to sites CFS_2023_82 and CFS_2023_87, discussed below. Small agricultural site with farm building, which could support some small scale conversion or infill development/redevelopment aimed at meeting rural needs. Such limited development could likely be dealt with through agricultural diversification policy rather than requiring a formal allocation for employment uses however.	C
CFS_2023_082	Land surrounding Sowerby Hall Farm, Preston, PR3 0TU	Greenfield agricultural land, located south and east of existing farm buildings, accessed by rural roads distant from key settlements.	2.35	Housing, employment, commercial	<ul style="list-style-type: none"> Accessed via rural roads Possible contamination from farm uses 	Rural site, distant from the foci of economic demand, including the A6 and M55 Corridors. A smaller site, however, this location may support rural demand and agricultural diversification. In this regard it should be noted that there is demand for light industrial space across Wyre Borough.	Land links to sites CFS_2023_081 and CFS_2023_87, in the same area, and could represent a further expansion opportunity here, meeting rural needs, particularly for light industrial and storage space. As with Sowerby Lodge, limited development, appropriate to this location, could likely be dealt with through agricultural diversification policy rather than requiring a formal allocation for employment uses	C
CFS_2023_083	Land at Copp Farm, Copp Lane, Great Eccleston, PR3 0ZN	Large area of greenfield agricultural land, extending south from the Eccleston settlement area, including a large farm complex in the north west.	23.69	Housing, employment, commercial	<ul style="list-style-type: none"> Farm/farm buildings onsite Trees onsite Copp Church of England School is directly opposite the site 	Demand in this area will be focused on the A586 Garstang Road. This site is distant from this road, however, and demand here is more likely to be limited to the light	Site has few constraints but would represent a very substantial extension of Great Eccleston south into the countryside.	D

Ref	Site Name/ Address	Site Description	Size, ha	Proposed Use(s)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						industrial/storage space which is needed across the Borough.	As occurred on the SA3/3 Land West of Great Eccleston site to the north, development here is likely to be predominantly for housing uses, with only a modest ancillary E(g)/B-Class plot provided. This site should be assessed primarily on how it could meet housing needs rather than employment needs.	
CFS_2023_087	Land North of Sowerby Lodge, Sowerby Hall Farm, Preston, PR3 0TU	Area of greenfield agricultural land, north of existing farm buildings accessed by rural roads distant from key settlements.	5.00	Housing, employment, commercial, leisure	<ul style="list-style-type: none"> Accessed via rural roads Majority of the site falls within Flood Zone 3 	Rural site, distant from the foci of economic demand, including the A6 and M55 Corridors. Demand in this location is unlikely to support the development of a site of this size, for the industrial and warehouse uses most required.	Land links to the above Sowerby Lodge site (Site CFS_2023_081) and Land surrounding Sowerby Hall Farm (Site CFS_2023_082). However, this is a larger site than the others and would represent a more significant development in the countryside. The rural location and narrow access roads would make a larger development more challenging here and likely of limited interest to developers and businesses.	D
CFS_2023_088	Land on the North West side of Puddle House Lane, Poulton-le-Fylde, FY6 8FE	Area of greenfield agricultural land, in an edge of settlement location to the rear of housing.	2.50	Housing, employment, commercial, leisure, retail, renewable, community and low carbon energy	<ul style="list-style-type: none"> Trees onsite Accessed via residential roads Ponds onsite Site slopes downhill from east to west Housing adjacent 	Site falls into the countryside area, adjacent, and falls into the Poulton-le-Fylde area of market interest but is distant from the main Poulton Industrial Estate and the A585. Located in the backlands, to the rear of housing and accessed by narrow residential roads, this site would be of limited market interest for the industrial and warehouse uses most in demand.	Site would require extension into the countryside area. Site is constrained by its backland location and the fact that the suggested access points are residential roads which would not support HGV traffic. An E(g)/B-Class development would thus be challenging to deliver here.	D
CFS_2023_090	Land at St Michaels Road, Bilsborrow, PR3 0RS	Irregularly shaped area of greenfield agricultural land, bounded by woodland and housing. With the Old River Brock running along the southern boundary.	1.78	Housing, employment, commercial, leisure, retail, nature recovery/ biodiversity net gain	<ul style="list-style-type: none"> Housing adjacent South and west of the site falls into Flood Zones 2 and 3. Excluding affected land, the net developable area reduces to 0.82 ha. 	The site is close to the A6 Corridor, a focus for demand, for industrial and warehouse uses in Wyre. However, immediate access is via the narrow St Michael's Road and developers and businesses would prefer a site with more immediate access to the A6. The site is privately owned and close to Myerscough College, a major education facility with aspirations for growth. However, in discussions the College indicated that it has no plans to develop E(g)/B-Class accommodation for businesses so any College related development which took place here would likely be for educational or student residential facilities only.	Site is constrained by flood risk and access. Although reasonably close to the A6, developers and businesses would still prefer less constrained options closer to the strategic road. The land is adjacent to Myerscough College and may facilitate its expansion, although any development here would be for non E(g)/B-Class uses.	D
CFS_2023_106	Land at Brock, Garstang Road, Bilsborrow, Preston, PR3 0BT	Area of greenfield agricultural land, fronting the A6 Preston Lancaster Road, with the railway line to the east and River Brock to the North, on the edge of the Brock (Bilsborrow) settlement area	2.15	Employment	<ul style="list-style-type: none"> Trees onsite Site falls into Flood Risk Zone 3 Some locations of ecological value on the site Housing adjacent 	Site enjoys a strong location on the A6 Corridor. It is 1.7 km south of the large Brockholes Employment Area, where businesses are seeking growth. The site also has access, albeit more distantly to the Broughton and the A6/M55/M6 Interchange, 7.1 km to the south. The A6 Corridor and particularly the Garstang/Catterall area is a focus for demand for industrial and warehouse	Site is well located off the A6 and consent for E(g)/B8 uses is actively being sought here. Given the proximity to Garstang/Catterall, a scheme of smaller industrial and warehouse units would likely be popular here. Flood risk is the key barrier to development here and it needs to be determined if the mitigation proposals put forward in the application are acceptable. If	B-

Ref	Site Name/ Address	Site Description	Size, ha	Proposed Use(s)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						<p>space, with schemes for light industrial accommodation being progressed and larger local businesses seeking growth land and premises.</p> <p>Outline Consent is being sought for 13 E(g)/B8 units of 469-929 sqm each totalling 7,216 sqm (App. No. 22/00612/OUTMAJ). The application is by a large local landowner.</p> <p>The site is subject to three previous withdrawn or refused applications for housing and more recently a withdrawn application for car storage, relating to a nearby motor retail business (App. No. 20/01157/FUL).</p>	consent is given, and delivery progresses, this would need to be recognised in the Local Plan.	

Source: BE Group, 2024

- 9.4 Of the five 'Omission' Sites put forward for Fylde Borough, the strongest candidate amongst these options is Land at Peel Hill which is very well located off Junction 4, M55, on the A583 Preston New Road. Although there are issues associated with sloping ground, standing water, and its high visibility from open countryside to the east. Located adjacent to the core market area of Whitehills the site is actively being promoted, by an experienced national land promoter, for employment uses, alongside other options. The site could provide some 24.50 ha, based on previous submissions, if all developed for E(g)/B-Class Uses. The main site constraint is likely to be access and it would need to be confirmed if suggestions for an access off the A583 Roundabout are achievable, as indicated.
- 9.5 Land at Corner Hall (Cornah Hall) Farm, Fleetwood Road, Greenhalgh-with-Thistleton could provide a secondary option which is also well located on the M55 Corridor. Up to 16.36 ha could be provided here although a smaller site may be preferred in this out of settlement location. Again, access to the adjoining A Road will need to be agreed.
- 9.6 A smaller option, Land North of Lytham Road Roundabout, Warton (2.23 ha) exists which could support the needs of the main settlements of Fylde Borough, assuming the landowners were amenable to an allocation for relevant uses here.
- 9.7 At Blackpool Airport Enterprise Zone, while plans for the Knowledge Quarter and Aviation Quarter may require some changes to Green Belt boundaries and Local Plan allocations, it is not yet clear if additional employment land will be generated, particularly as the Aviation Quarter will accommodate, at least in part, uses relocated from the existing Airport complex. An area masterplan is being produced which will qualify some of these issues.
- 9.8 In Wyre there were 21 sites where E(g)/B-Class uses are put forward as being one of the preferred use by the respondent. The 21 sites would provide 186.79 ha of potential land if all sites were taken forward exclusively for employment development. However, many of the Call for Sites options put forward are located in the rural north and north east of Wyre Borough, in isolated locations which would be low priorities for businesses and developers looking for land. Options put forward close to the River Wyre also fall into Flood Zones 2/3 and may not be developable for relevant uses.

- 9.9 Three sites were graded B-/B+ can be said to represent the best options for employment land supply, measured against market and deliverability criteria. All three fall into the A6 Corridor area with links to Garstang and Catterall, with no equivalent found in the west of Wyre Borough:
- Site CFS_2022_036: Westfield Farm, Claughton on Brock, Garstang, PR3 0PU (17.00 ha) – Site has some physical constraints, and visual impact, but if they can be overcome would represent a significant further growth option for the nearby Brockholes Employment Area and the A6 Corridor more generally.
 - Site CFS_2023_078: Old Holly Farm, Cabus, Preston, PR3 1AA (3.49 ha) – More rural than other options and detached from the settlement but still prominently located on the A6, a focus for market interest, with few constraints to development.
 - Site CFS_2023_106: Land at Brock, Garstang Road, Bilsborrow, Preston, PR3 0BT (2.15 ha) – Consent for 13 E(g)/B8 units is actively being sought here, on an A6 site which links well to Garstang and Catterall. The site falls into Flood Zone 3 however, and it has yet to be determined if the mitigation proposals put forward in the application address this constraint.
- 9.10 Ultimately, **22.64 ha** of supply is potentially available in the options graded B+ to B-. However, all three sites are greenfield in nature, with physical constraints, including Flood Zone 3, which will need to be considered further before any Local Plan allocation could be made if allocations are needed.

SUMMARY

- 9.11 A review of 26 Further Growth Opportunities where B-Class employment uses were proposed, either individually or as one of several possible uses, has been undertaken. These have been appraised and graded A-E, as defined in Table 94 above. The results of this grading are set out in Table 96, below.
- 9.12 In Fylde, three sites, totalling up to 43.09 ha were graded A- to B- and could provide additional employment land, if needed, assuming landowner interest and assuming constraints, primarily access, can be addressed. These sites would also have to be assessed against any other sites which were put forward via Call for Sites and which may be more suitable for employment development.
- 9.13 Of a potential supply of 186.79 ha in Wyre, 12.1 percent or 22.64 ha is potentially available in the options graded B+ to B-. It is noted, however, that these options are

focused in the A6 Corridor with no deliverable options put forward close to the main settlements of the west.

Table 96 – Further Growth Opportunities Appraisal

Category	Number of Sites (Land Supply, ha)		Comments
	Fylde	Wyre	
<u>A+</u> Unconstrained/Limited Constraints – Strategic Development Options	-	-	-
<u>A-</u> Constrained – Strategic Development Options	1 (24.50)	-	Land at Peel Hill offers a strategic growth option for the Whitehills area of Fylde Borough, assuming access can be agreed and other issues resolved
<u>B+</u> Unconstrained/Limited Constraints – Local Development Options	-	1 (3.49)	Old Holly Farm, Cabus, Preston, in Wyre Borough, has negligible constraints.
<u>B-</u> Constrained – Local Development Options	2 (18.59)	2 (19.15)	Local options for growth, but with constraints which will need to be accounted for before any allocation could be made.
<u>C</u> Local Scale Mixed Use Sites/Proposed to Meet Specific Business Needs/Rural Development	-	2 (3.85)	Two smaller sites which may meet rural business needs. Development here could be dealt with through agricultural diversification policies, however.
<u>D</u> Limited suitability for B- Class Uses	1 (8.32)	15 (155.35)	Based on market fit/deliverability, sites are poorly suited for employment development. This does not preclude the possibility that they are suited for other uses.
<u>E</u> Unlikely to be deliverable development site	-	1 (4.95)	Assumed undeliverable for most uses.
<u>N/A</u>	1 (34.60)	-	It remains unclear if changes at Blackpool Airport Enterprise Zone will deliver further land for E(g)/B-Class uses.
TOTAL	5 (86.01)⁶⁴	21 (186.79)	-

Source: BE Group, 2024

⁶⁴ Figures indicative at this time.

10.0 CONCLUSIONS

INTRODUCTION

- 10.1 This study has included a wide-ranging look at the factors affecting the Fylde Coast's economy, with reference to those that are likely to affect the future need for land and property within the areas. This section draws together the main issues that will need to be addressed in support of the recommendations set out in Section 11.0.

POLICY AND STRATEGY

- 10.2 The study has been undertaken in line with both the revised National Planning Policy Framework (2023) and relevant Planning Practice Guidance.
- 10.3 The 2020 Use Classes Order Amendment combines the B1 Office/Research/Light Industrial Uses along with the partly A and partly D1/ D2 uses into a single 'E' Use Class. For the Fylde Coast, the practical effects of this are likely to include some greater pressure to convert town centre offices to other uses, although the market for many of those alternative uses is suppressed at this time. The Use Class change has no spatial considerations and therefore will apply outside of town centres as well. It thus has the potential to result in the introduction of non-office/non-industrial type activities, including retail, in out of centre business parks, and industrial estates, although this is a trend which has been ongoing for some time and can, in moderation, beneficially diversify local economic activity.
- 10.4 Large scale conversions of office and industrial uses are unlikely in modern industrial estates/business parks which are well occupied, still meeting business needs and generating a reasonable return for owners. As noted, in Section 7.0 and below, business stock across the Fylde Coast is very well occupied and mostly of reasonable quality. There remains a risk of larger losses in secondary industrial estates, on strategic road corridors where uses such as retail, leisure and trade would be desirable and could generate higher values for landowners. Accordingly, the Councils should monitor losses to see if the scale of changes of use is impacting significantly on the wider offer of floorspace to businesses. If the scale of losses does prove excessive then updated employment land research could usefully be commissioned to determine if the scale of loss warrants further employment land provision, above the OAN rates identified here.

- 10.5 Emerging county strategy includes Lancashire 2050, a shared strategic framework for long term growth, based around the priorities of Economic prosperity, Environment and climate, Transport and infrastructure, Housing, Early years and education, Health and wellbeing, Employment and skills, Communities and place. This strategic framework will be endorsed by the 15 Lancashire local authorities, other key stakeholders and LCC. Action Plans will be developed around the above priorities to make cases for extra tools, powers and resources to central government. In itself, the Lancashire 2050 project will not generate additional employment in Lancashire but will inform bids for monies which could create further employment and support commercial development.
- 10.6 Local policy and regeneration programmes are summarised in Section 2.0 of this Study and are not repeated here. However, it is important to note that policy identifies three Enterprise Zones for the Fylde Coast – Blackpool Airport Enterprise Zone (Blackpool/Fylde), BAE Warton (part of Lancashire Enterprise Zone) (Fylde) and Hillhouse, Thornton Cleveleys (Wyre). The impacts of these major policy initiatives, on jobs, employment land supply, etc., have been considered throughout this Study and is concluded below.

ECONOMIC PROFILE

Population Change/Migration

- 10.7 According to the 2021 Census, the Fylde Coast had a total population of 334,400 in that year, with Blackpool at 141,100, Fylde at 81,400, and Wyre with 111,900. Between 2011 and 2021, Fylde and Wyre's populations increased, but Blackpool saw a decline in the population of 0.7 percent, albeit at the same rate as 2001-2011 (a population decline of 0.7 percent), and a slower rate of decline than that noted across 1981-2010 in the 'Local Economy Baseline for Blackpool' (a 6.4 percent loss). Fylde's population increased by 7.4 percent (or 5,600 people) since 2011, higher than the North West and England growth averages. Wyre has continued to show steady growth since 2011 but remains below the North West average (3.9 percent versus 5.2 percent).
- 10.8 Blackpool's population is forecast to moderately increase, by 1.6 percent, to 142,000 by 2042. Fylde is expected to have the largest percentage growth of the three districts, expanding by 16 percent to 92,524 people by 2042, above the North West and English average projected increases of 11 percent and 13 percent

respectively. Wyre is expected to see steady population change of 10.3 percent, largely in line with regional and national growth, with its population reaching 122,681 by 2042.

- 10.9 Much of the growth, noted above, is expected to take place in the over 65 age groups. This is particularly notable in Fylde which is expected to see a 56.5 percent increase in those over 65, above the regional and national average growth rates of over 65s of 36 percent and 44 percent. Thus, no part of the Fylde Coast can assume a significant increase in its local working age population. Achieving the forecast jobs and GVA growth, noted below, will require improvements in the skills and productivity of existing workers and attracting new incomers to the sub-region with employment and housing opportunities.
- 10.10 In 2012 both Fylde and Wyre recorded substantive numbers in incomers as a whole and in people of working age particularly, while Blackpool had a marginal net loss. In 2020 the position remained, with net inflows to Fylde and Wyre particularly led by an older demographic, and more modest inflows of people of working age. Blackpool had a net loss of all ages, and those of working age, albeit at a lower level than in 2011.

Employment and Business Change

- 10.11 The general trend of employment across the Fylde Coast has been positive since 2011. Overall, employment in Fylde and Wyre has nominally increased by c.5,000 and c.3,000 workers respectively across industries. Conversely, total employment in Blackpool has decreased by c.2,000 employees across all sectors.
- 10.12 As of 2021, Blackpool had an unemployment rate of 6.0 percent, reduced from 10.5 percent in 2011; Fylde had a rate of 3.5 percent, down from 4.6 percent and Wyre a rate of 5.3 percent, down from 6.1 percent. Reductions in unemployment, since 2011, are a national trend. However, it should be noted that unemployment levels in Blackpool and Wyre remain above the regional and national averages of 4.1 percent and 3.7 percent.
- 10.13 In the Fylde Coast, as of 2022, there were 3,870 VAT and PAYE registered businesses operating in Blackpool, 3,330 in Fylde, and 4,095 in Wyre. Overall, there were 271,165 businesses registered in the North West, meaning that 3.8 percent of

the region's business were located on the Fylde Coast. Within this stock of businesses, 87.9-90.0 percent were micro-firms, with between 0 and 9 employees.

10.14 In terms of key industrial sectors, the key trends over 2011-2021, and projected onwards to 2042 by Cambridge Econometrics forecasting are:

- **Human Health and Social Work Activities** – The health sector has seen the strongest growth by employment the Fylde Coast, a total increase of some 5,700 workers, 53 percent of this being in Blackpool, 23.5 percent in Fylde and 23.5 percent in Wyre. In the case of Blackpool, growth was driven by increases in employment in the Teaching Hospitals NHS Foundation Trust. More generally, it is a function of aging populations, which are increasing the need for long term personal care amongst populations and care staff in residential institutions. As the population is projected to keep aging, it is unsurprising that this sector is predicted to continue to grow between 2022 and 2042, with a total projected increase across the Fylde Coast of 3,479 jobs or a 12.3 percent increase from 2022 levels. This growth will focus in 'Residential and Social Activities'.
- **Public Sector Employment** – Including the Health Sector, mentioned separately above, public sector employment accounts for 36-37 percent of employment on the Fylde. This compares to averages of 32 percent and 30 percent for the North West and England respectively. This is unsurprising given the range of major public sector employers on the Fylde Coast, include the DWP with some 3,000 employees, National Savings and Investments, and HM Land Registry, alongside NHS health sector employment. Excluding health and social care, public sector employment has seen little growth since 2011, however, neither did it decline in the post-2010 period of national austerity. Looking at future forecasts for public sector employment, this dominance of the workforce is expected to remain steady to 2042, with negligible change in the proportion of the workforce it employs. This is reflective of market assessment and consultation with stakeholders which indicated that no large public sector employer was planning on significantly increasing or decreasing their employment levels.
- **Manufacturing** – Manufacturing sector employment is proportionally strongest in Fylde, at 9.3 percent, followed by Wyre and then Blackpool. In all three locations, manufacturing employment has declined since 2011, with the strongest declines being in Fylde and Wyre. The decline in manufacturing jobs follows longstanding regional and national trends as the sector moves away from low-value labour-intensive manufacturing and a movement towards automation and white-collar

work.⁶⁵ Declines in manufacturing employment are projected to continue to 2042, especially in Fylde Borough with a forecast loss of 2,159 employees by 2042 or c.25 percent reduction.

- **Private Office Sectors** – Private office sectors account for 12.6 percent of employment in Blackpool, 18.1 percent of employment in Fylde, and 14.3 percent in Wyre. Of the three local authority areas, only Fylde’s proportional private office sector employment was comparable to the North West average of 18.9 percent or the English average of 22.1 percent, although the latter will be skewed by above average office sector employment in major cities. This will reflect the presence of multiple large office sector employers in Lytham. Local office sectors have seen negligible or negative growth since 2011, suggesting a limited local market even excluding national shocks to office sectors such as the Covid-19 Pandemic. This aligns with observations by SQW in 2011 that saw no private sector job growth in Blackpool between 2005 and 2008⁶⁶. Despite this, office sectors are projected to gain c.2,700 jobs by 2042, with growth focused in the Information and Communication sector and in Wyre Borough. This reflects the wider national change from a lower skilled workforce to a higher skilled service sector economy.
- **Construction Sector** – The Construction Sector has seen a slight rise in employment since 2011, in part reflecting a general return to growth after a sharp decline following the 2008 crash, with total growth across the Fylde Coast close to 1,000 jobs. This steady growth is forecast to continue to 2042, with an expected gain of 1,192 jobs in the sector, predominantly in Fylde Borough. This is to be expected given the continued rise in demand for housing and the decarbonisation of existing residential, commercial, and industrial buildings to meet new regulatory standards.
- **Transportation and Storage Sector** – The Transportation and Storage industry has only a modest role in the economy of the Fylde Coast, with proportionate employment levels falling below the wider averages of around 5 percent. The sector has also seen zero or negative growth since 2011, as is expected given the M55 Corridor being considered a secondary market for logistics activities compared to the M6 and M62 cross country routes. Employment growth in this sector is forecast to be marginal, with 393 jobs expected to be created by 2042, mainly in Fylde Borough (making up 42% of the projected job growth).

⁶⁵ The Implications for Employment of the Shift to High-Value Manufacturing, 2013

⁶⁶ Section 3.34 - Blackpool Local Economy Baseline Study, SQW, 2011

- **Accommodation and Food Sector** – All three districts have larger proportions of workers employed in the Accommodation and food services industry compared to the regional and national averages, showing that the sector remains strong across the Fylde Coast. In Blackpool, the district's high-quality large-scale tourist attractions and traditional appeal as a domestic tourist destination contributed £1.4 billion in output in 2021, while tourism in Blackpool accounted for almost 40 percent of all visits to Lancashire County in the same year.⁶⁷ The Fylde Coast is further forecast to see a 13.8 percent overall increase (+2,287) in employment in the Accommodation and Food Services industry, indicating the prevailing strength of the tourism sector across the district.

10.15 Overall, between 2022 and 2042, job gains across all local authority areas are expected to exceed job losses, indicated by the overall projected increase of 9,262 jobs across the Fylde Coast – 3,993 in Blackpool, 1,808 in Fylde, 3,461 in Wyre. As noted above, that growth is expected to focus in higher and mid-skilled sectors including office based areas, health and construction while employment in manufacturing, and primary sectors like mining decrease. This trend is consistent with past sectoral change, since 2011.

GVA Change

10.16 Gross Value Added (GVA) has grown across the Fylde Coast since 2011, increasing to £2,704 million (a 35.8 percent increase from 2011) in Blackpool, £2,654 million (up 7.4 percent from 2011) in Fylde, and £1,660 million (up 35.4 percent from 2011) in Wyre. The Health, Accommodation and Food Services, and Construction industry have all shown growth since 2011 in their GVA contributions to the local economy, aligning with the rise in employment in these sectors. Interestingly, the manufacturing sector has also seen an increase in value, despite job losses, further demonstrating the improved productivity of automation which is expected to persist to 2042. GVA is forecast to further increase by 2042, to £3,267 million in Blackpool (an increase of a quarter), £2,770 million in Fylde (an increase of 21 percent), and £2,023 million in Wyre (an increase of a quarter), with particular growth in the IT Services, Construction, and Real Estate sectors. This aligns with policy priorities going forward on enhancing digital infrastructure and continuing to tackle the housing crisis.

⁶⁷ <https://www.visitblackpool.com/latest-news/blackpool-s-post-pandemic-tourism-figures/#:~:text=The%20report%2C%20which%20evaluates%20the,in%20excess%20of%2020%2C000%20jobs>

Skills

- 10.17 The Fylde Coast has been moving towards a higher skilled economy since at least 2011, and overall, local skill levels have been improving to match this. The number of people attaining NVQ Level 4+ qualifications, equal to a degree level, have seen substantial increases across the Fylde Coast, with a 7 percent increase in Blackpool, a 4.7 percent increase in Fylde, and a 5.3 percent increase in Wyre. Fylde, in particular, has a higher level of people with NVQ4+ qualifications than the regional and national average – 34.5 percent, compared to 31.2 percent across in the North West, and 33.9 percent across in England. The proportions of local people with no qualifications has decreased since 2011, across the Fylde Coast.
- 10.18 Skills growth is clearly occurring across the Fylde Coast and is projected to grow further this decade, by the Cambridge Econometrics forecast. There remain skills gaps however, that need to be addressed. By key sector, the Lancashire Local Skills Improvement Plan (2022), combined with stakeholder comments for this Study, identify the key shortages to be:
- Manufacturing and Engineering – Shortages are in skilled technical sectors, and associated data analysis and procurement, particularly outside of the aerospace sector.
 - Construction – Skilled technical roles, such as plumbers and electricians, site managers and Quantity Surveyors. As noted, most businesses are micro firms who lack the time and resources for skills development.
 - Health and Social Care – Healthcare assistants, nursing staff and adult social care roles, to support an aging population.
 - Transport and Distribution – Drivers, technicians and transport managers, alongside warehouse operatives.
 - Hospitality, Leisure and Tourism – Catering assistants and waiting staff, hospitality managers, administration and marketing roles, reflecting difficulties in staff retention.
 - IT and Digital – Software engineers and developers, cyber security roles. Retaining such staff on the Fylde Coast can be difficult in a competitive regional environment.
- 10.19 Local firms are generally well aware of their skills shortages. Larger companies are actively addressing their ongoing skills needs. For smaller firms, which lack that capacity, as noted in the Lancashire Local Skills Improvement Plan (2022), there is a need for new shorter courses, by Higher/Further Education institutions reacting to upskilling needs and changing employer requirements.

10.20 Higher and Further Education institutions, contacted for this Study, are similarly aware of where the main skills gaps are and are pursuing courses, etc. to fill those gaps. With public funds for skills in flux, most notably with the end of EU Funds, there is some uncertainty about the range and extent of training which can be offered moving forward but education institutions are working to address this.

Economic Summary

10.21 As a whole, the Fylde Coast is expected to see modest economic growth which is forecast to continue into the medium and long term. Skill level improvements have been met with an increase in proportion of workers in high-value employment occupations, and a consequent increase in GVA. It is important that all three local authorities continue to monitor the changing demand for industry employment as a result of the ageing population, to ensure the supply of appropriately skilled labour aligns with the changing demand. Recommendations to achieve this are provided in Section 11.0.

CLIMATE CHANGE

10.22 The effects of climate change is driving the need for a low carbon future, and indeed Blackpool and Wyre have both declared a climate emergency in recent years with attendant strategies to deal with this. Studies suggest that the adverse effects on the Fylde coast are most likely to affect agriculture, with the potential for flooding, drought and heatwaves. This means that smarter use of land, adoption of alternative species of arable crops, and crop rotation may form part of the solution.

10.23 In relation to employment and business growth, some of the main growth areas are in professional consulting (for net zero / low carbon solutions) to businesses, households and the public sector and construction. Both of these sectors are predicted to grow in the three boroughs in the foreseeable future, based on the data in this study. Indeed, experience suggests that the spread of employment will be universal in the UK, as the simplicity of installation of certain products does not require a high degree of technical skills, and therefore the construction sector, and in particular small and micro businesses are able to offer a competitive advantage.

10.24 Tackling Climate Change on the Fylde Coast will generate a number of economic opportunities which can be realised if the right offer of premises can be delivered specifically:

- A growing construction sector will further boost demand for smaller industrial and warehouse properties of sub-500 sqm to house construction businesses. The market is delivering properties of this type but there remain shortfalls
- A range of renewable energy projects are already proposed on the Fylde Coast. At present, these are concentrated in the Hillhouse Enterprise Zone but opportunities to provide such uses elsewhere should be explored. A broader trend is for industrial estates, business parks, large single businesses, etc. to generate a portion of their own power through local renewable sources. Such investment will provide construction and management opportunities for developing and operating such energy facilities. However, land allowances will need to be made, on or adjacent to, employment sites to provide space for the required infrastructure
- Investment into renewable energy (including offshore energy in the Irish Sea), carbon capture, climate modelling, building retrofit, amongst other topics, will generate opportunities in a diverse range of associated consulting and IT related sectors. Good quality office options will be needed to capture these businesses locally. At this time there is a heavy dependence on the Knowledge Quarter scheme at Blackpool Airport Enterprise Zone to meet this and other office needs
- To maximise value from the growth of renewable energy, low carbon and related sectors, the Fylde Coast should seek to attract not just renewable energy/low carbon infrastructure but also the manufacturing industries that produce that infrastructure. the Fylde Coast has advantages including a growing green energy cluster at Hillhouse (which includes some manufacturing), training facilities, accessibility for offshore energy programmes and an established, and growing, advanced manufacturing cluster at the Blackpool Airport Enterprise Zone which can help to attract such high value production to the sub-region.
- Climate Change will put stress on the agricultural sector but can also generate economic opportunities by encouraging farm diversification.

10.25 However, constraints to growth must also be recognised. A key one being that it will be largely impossible to viably deliver offices to the highest environmental specifications on the Fylde Coast without significant public sector support. This will likely apply to certain specifications of industrial premises as well, limiting what high value businesses can ultimately be attracted to the Fylde Coast.

PROPERTY MARKET ASSESSMENT

Industrial/Warehouse Market

- 10.26 Although the macroeconomic issues of 2022 have hit national/regional industrial and warehouse demand, reducing it from a 2021/early 2022 market peak, there remains plenty of market interest, including a strong investment market, and high occupancy rates across the North West. There is an identified regional shortage for higher grade stock, particularly for larger units as development activity is focused on the sub-1,500 sqm market.
- 10.27 On the Fylde Coast, over the last decade at least, the vast majority of market transactions have been for sub-500 sqm units meeting primarily local micro/small business needs. This is unsurprising as most of the existing industrial stock comprises sub-500 sqm units as does the supply of marketed premises and private sector development plans on identified employment sites. Additionally, 88-90 percent of all local businesses in Blackpool, Fylde and Wyre are micro firms, employing less than ten staff, which will only generate small property requirements.
- 10.28 Market activity for units larger than 500 sqm, and particularly larger than 5,000 sqm, is limited, making it difficult for the Fylde Coast to compete for inward investment requirements. As is discussed below, this partially reflects shortages in supply, against business demand. Transaction rates have reduced somewhat since 2020. In part this reflects national issues, such as high inflation and interest rates, which are inhibiting business activity. However, these are anticipated to be short term constraints on the capacity of businesses to invest in new/expanded premises, with overall demand remaining strong and market recovery anticipated in 2024-2025.
- 10.29 Table 97 shows the scale of the supply shortage on the Fylde Coast. The industrial and warehouse stock in the Fylde Coast is, on average, 98 percent occupied. The available marketed industrial premises in each Fylde Coast local authority area generally equates to a year, or less, of forward supply against average annual property take up rates of:
- Blackpool – 33 deals and around 15,700 sqm of floorspace transacted/year
 - Fylde – 18 deals and around 6,600 sqm of floorspace transacted/year
 - Wyre – 18 deals and around 6,200 sqm of floorspace transacted/year.

Table 97 – Fylde Coast Industrial Stock Occupancy Rates, Percent

Local Authority Area	Industrial	
	Units	Floorspace
Blackpool	97.5	97.8
Fylde	97.9	98.7
Wyre	99.0	98.4
Total	98.1	98.2

Source: VOA, BE Group, 2024

- 10.30 For units above 500 sqm, stakeholders identify the main shortage to be for mid-sized B2/B8 units of 1,500-4,000 sqm each to allow local businesses, currently occupying units of around 1,000 sqm each, to grow. The lack of such options is preventing local business growth, with firms having to look towards Central Lancashire to meet needs, although there are plenty of supply shortages in this sub region as well. It also means there are no options to market to inward investors. There is a particular shortage of freehold options to allow businesses to invest in owner occupation.
- 10.31 At this time, rising construction costs, combined with limits on the rental levels which businesses are willing and able to pay, are discouraging developers from delivering the premises which might fill this supply gap. However, improving economic conditions, from 2025 onwards, are expected to prompt developers to start delivering at least some larger industrial and warehouse options, without significant public sector intervention being required. This last point was felt to be true across the Fylde Coast but will be particularly true in locations on strategic road corridors where business demand is focused.
- 10.32 Stakeholders do not report market interest for still larger 5,000 sqm stock, which might compete for regional and national enquiries. In Lancashire, interest for such units is focused on the M6 Corridor which benefits Lancaster and Central Lancashire against the Fylde Coast.
- 10.33 The most active locations in terms of market transactions include the Blackpool Airport Enterprise Zone and Kinraig Business Park / Moorfields Estate in Blackpool, Whitehills in Fylde and the industrial estates of Thornton Cleveleys and Poulton-le-Fylde in Wyre. These locations, which link to the M55 Corridor, are also the focus of present demand. Even here though the market is predominantly local, drawing labour and occupiers from the main population centres of Blackpool, St Annes, Lytham and Thornton Cleveleys.

10.34 Average rents are £4-6/sqft (£43-65/sqm), extending to £8/sqft (£86/sqm) at prime locations or up to £12/sqft (£129/sqm) for high grade light industrial units. These rental levels suggest that the Fylde Coast does not have a significant problem with lower grade industrial stock, a view supported by stakeholder comments.

Office Market

10.35 Following the end of the Covid-19 Pandemic and associated Lockdowns, most businesses have accepted that hybrid working will be a permanent feature of operations moving forward. As a direct result, businesses are reassessing the amount of floorspace they need. Many businesses are downsizing, usually at lease events. In particular, they are leaving older stock and prioritising higher grade options. This trend favours smaller, high grade suites of sub 200 sqm each which are well located on main road corridors and with good public transport links. Sustainability policies are also pushing businesses towards modern stock with higher EPC Ratings, against older options.

10.36 Whitehills and Blackpool Airport/Squires Gate are the most desirable locations for office uses on the Fylde Coast, offering strong transport links and a sizeable body of high grade stock. Accordingly, this area has seen comparatively high office market transaction rates over the last decade. The area also offers a good mix of serviced multi-occupancy space and self-contained suites, providing the flexibility to scale up or scale down their operations, as required, while staying local. The main Fylde Coast town centres, including Blackpool, St Annes, Lytham and Thornton Cleveleys benefit from critical masses of existing office firms who want to stay local but suffer from a lack of modern, higher grade space and serviced options which give businesses the flexibility they crave. Without investment in more modern space, it is expected that businesses will be forced to look further afield to support future growth or consolidation.

10.37 A lack of modern office stock, of the types required by businesses, is identified by stakeholders as one reason why sub regional office transaction rates have reduced since 2020. Most office market activity on the Fylde Coast is from local firms, seeking suites of sub 500 sqm and particularly sub 200 sqm, each. Again, this will reflect the fact that 88-90 percent of all local businesses in Blackpool, Fylde and Wyre are micro firms, employing less than ten staff, which will only generate small property requirements.

10.38 There are few transactions for larger offices recorded, which likely reflects the fact that most larger office buildings on the Fylde Coast are fully occupied and have been for some time. Most market activity is for leasehold premises.

- 10.39 A general oversupply of older stock is suppressing rents across Lancashire. New modern options could be expected to command rents of £10-12/sqft (£108-129/sqm) on the Fylde Coast, reducing to £6-9/sqft for older space (£65-97/sqm). This is only slightly less than the best rents which might be achieved in Preston, some £14.50/sqft (£156/sqm). However, it remains well below the rate at which new offices could be viable, without public support at least, £25/sqft (£269/sqm). Such rates are completely unachievable anywhere in the North West outside of Manchester and Liverpool City Centres. Thus, any new offices which are delivered locally for the foreseeable future will require public sector inputs. This is true even at prime locations such as Whitehills Park where the bulk of office development has been for design and build options and speculative office development will not be considered.
- 10.40 In this regard, the Knowledge Quarter development at Blackpool Airport Enterprise Zone, will provide the opportunity to deliver modern office space, to meet the new requirements of businesses on the Fylde Coast. An element of public sector support is assumed here to allow for likely viability constraints.
- 10.41 While there are some deficiencies in the office supply of the Fylde Coast, against demand, it is important to note that the sub-regional stock of offices is still 97-98 percent occupied (see Table 98). As was the case for industrial stock, with the partial exception of Wyre, the Fylde Coast generally has a year, or less, of marketed premises against average annual property take up rates of:
- Blackpool – 22 deals and around 7,300 sqm of floorspace transacted/year
 - Fylde – 17 deals and around 4,100 sqm of floorspace transacted/year
 - Wyre – 7 deals and around 1,400 sqm of floorspace transacted/year.

Table 98 – Fylde Coast Office Stock Occupancy Rates, Percent

Local Authority Area	Office	
	Units	Floorspace
Blackpool	97.0	98.0 ⁶⁸
Fylde	96.7	96.8
Wyre	97.2	98.5
Total	96.9	97.7

Source: VOA, BE Group, 2024

SITE SPECIFIC MARKET DEMAND AND GROWTH – THE ENTERPRISE ZONES

10.42 In terms of the Enterprise Zones the following market comments can be made:

- Blackpool Airport Enterprise Zone – Blackpool Airport Enterprise Zone has been a focus for investment by local industrial firms. Sub 500 sqm industrial units are most commonly required, but agents also report good interest for 2,000-4,000 sqm properties, mostly from established businesses from within the Fylde Coast and particularly from other areas of Blackpool. Given the lack of available larger industrial units elsewhere, and limited plans for their delivery, key development moving forward will be the BB2: Eastern Gateway site which proposes units up to 6,968 sqm each. In terms of the office market, good demand is noted for sub 200 sqm suites, which are available in the serviced business centres, reflecting the modern office market discussed above. Demand is again from local businesses. Viability issues mean that the delivery of new offices, by the private sector, is very unlikely anywhere on the Fylde Coast in the short-medium term and the public sector led Knowledge Quarter (Silicone Sands) proposal, on the site of the existing airport buildings, proposal is the main opportunity for office development on the Fylde Coast.
- Lancashire (BAE Warton) Enterprise Zone – This site remains in the exclusive use of BAE, so no companies are occupying the area that are not directly part of BAE operations. With all land at the Samlesbury Enterprise Zone, in South Ribble/Ribble Valley now developed or identified for the new National Cyber Force Campus, the emphasis of further development will move to Warton in the future. Over 2023/2024 a new masterplan is being produced for the Warton Enterprise Zone. As was the

⁶⁸ Figure exclusive of vacant and not marketed stock at Warbreck Hill. Including Warbreck Hill reduces the vacancy rate to 79.3 percent by floorspace.

case in 2014, the new Masterplan is expected to propose the bulk of the available land for E(g)/B-Class development, with a focus on aerospace and advanced manufacturing activities.

- Hillhouse Enterprise Zone – The Hillhouse Enterprise Zone has mostly seen investment for local industrial/warehouse premises and energy sector infrastructure to date. This trend is expected to continue in the future and reported inward investment interest is for battery storage and energy facilities alongside demand for general warehouses of 1,000-2,000 sqm, mostly from firms from across Lancashire. The strongest local demand is for industrial units, of mostly less than 1,000 sqm each, including an element of offices.

BUSINESS ENGAGEMENT

- 10.43 Despite issues of inflation, high interest rates and the impacts of the lockdowns associated with the Covid-19 Pandemic and trade restrictions with the European Union, large industrial businesses are planning for growth which is generating property requirements of 5,000-30,000 sqm, albeit not always in a single property. As units of this size range are not readily available in the Fylde Coast, and unlikely to be delivered in the short-medium term, many companies are looking to fund development to meet their own needs. However, opportunities to fulfil these requirements have varied, and a number of firms have struggled to find the available, unconstrained development land (sites of up to 7.5 ha) they need. Sites with immediate access to the M55 are most favoured, including at Blackpool Airport Enterprise Zone, Whitehills, Kirkham/Wesham and to a lesser degree sites at Thornton Cleveleys and Poulton-le-Fylde.
- 10.44 The office firms contacted also report longer term growth plans which will generate property requirements of up to 3,000 sqm over the Local Plan period. Although office businesses have increasingly embraced hybrid working practices since 2020, workers only operating part time from the office still generate a space requirement and steady staff growth will still generate additional office space needs over time. Again, properties in this size range are rarely available locally and businesses have been proactive in securing space when it becomes available. Offices with good links to the M55 Corridor as well as in Lytham and St Annes are most desirable.
- 10.45 Other than these, often long term property needs, businesses are broadly satisfied with their locations in the Fylde Coast. In terms of infrastructure, it should be noted that advanced manufacturing businesses frequently have higher than average power

requirements that cannot be met in a standard industrial unit. However, as many of these businesses are seeking bespoke premises, developed to meet their specific requirements, such issues can be factored in. Businesses do not report significant issues with crime or anti-social behaviour.

THE FUNCTIONAL ECONOMIC MARKET AREA

10.46 Based on evidence on services, infrastructure and commuting data the FEMA for Fylde Coast includes the Central Lancashire local authorities of Chorley, Preston and South Ribble, as well as Lancaster, Ribble Valley and Blackburn with Darwen. The other areas of Lancashire, as well as Manchester and Liverpool, have more limited relationships with the Fylde Coast. The main overlapping issues with the Fylde Coast are identified in the Table 99 below.

Table 99 – FEMA Issues Summary

Area	Key Issues
Central Lancashire - Chorley	In Chorley Borough's, economic focus is in the area of Buckshaw Village and around Junction 8, M61. As a result, Chorley's economy links more strongly to Central Lancashire and Greater Manchester than the Fylde Coast.
Central Lancashire - Preston	<p>The City of Preston generates a number of cross boundary issues for the adjacent Fylde Coast:</p> <ul style="list-style-type: none"> • A long established centre for the office market in Lancashire, Preston is a competing centre to locations on the Fylde Coast for office development. However, viability constraints, a national issue, will limit office development in both Preston and the Fylde Coast, outside of public sector supported schemes for the short-medium term • Preston benefits from direct links to the M6 around Junction 31a and this North East area of the city competes for small to medium industrial and warehouse development with the Fylde Coast • The newly opened Junction 2, M55 provides improved linkage to key Fylde Coast facilities such as Westinghouse, Springfield and between the Warton and Samlesbury portions of the Central Lancashire Enterprise Zone • One benefit of Junction 2, M55 is that it provides the growing residential communities of North West Preston with greater access to the Fylde Coast and its businesses. In time employment developments in North West Preston may also compete with equivalent locations on the Fylde Coast.
Central Lancashire – South Ribble	In South Ribble the main strategic links to the Fylde Coast are through the Samlesbury Enterprise Zone, partner to the Warton Enterprise Zone. The Samlesbury Enterprise Zone has been the focus for aerospace investment in the combined Lancashire Enterprise Zone. In the future Samlesbury will accommodate a campus for the National Cyber Force which will inevitably draw in high skilled labour for ICT sectors from across Lancashire and could deprive other locations, such as the Fylde Coast of skilled staff. However,

Area	Key Issues
	<p>with the development of the Campus, the Samlesbury Enterprise Zone will be close to capacity and the emphasis of development in areas such as aerospace could move more to the Warton and Blackpool Airport Enterprise Zones.</p> <p>Proposals at the Cuerden Strategic Site or Lancashire Central include up to 19,000 sqm in offices. If delivered, this floorspace would further enhance the office offer of the Preston Conurbation. However, given the viability issues which have affected office development across the region in recent years, it is unclear if this aspect of the project will be realised, at least at the scale proposed.</p>
Pennine Lancashire – Blackburn with Darwen	Here growth is focused on the M65 Corridor which has only limited linkages to the Fylde Coast. The established cluster of aerospace and related engineering businesses in Blackburn with Darwen does not appear to have affected growth at competing locations such as the Blackpool Airport Enterprise Zone.
Pennine Lancashire – Ribble Valley	A rural location, most economic activity taking place here is at the local scale only.
Lancaster	The strategic scale Bailrigg Garden Village now appears unlikely to proceed, at least in its present form. Heysham Port is the main competing facility for Fleetwood and its continued growth is expected to limit options for port related facilities at Fleetwood Marina and Docks. At Morecambe, Eden Project North will represent a new leisure attraction for Lancashire, competing with Blackpool attractions although its longer term impact will likely be dependent on how much of an associated hotel, hot food and ancillary leisure offer it can attract.

Source: BE Group, 2024

- 10.47 Overall, the most significant economic links are between Preston and the Fylde Coast. The city has a strong and established office market which will compete for labour and businesses with its neighbours, limiting office sector growth potential on the Fylde Coast. However, in the short to medium term, viability constraints, a national issue, make private sector led office development unlikely in any location. Preston benefits from direct links to the M6 around Junction 31a and competes for small to medium industrial and warehouse development with the Fylde Coast. The completion of Junction 2, M55 improves accessibility between the Fylde Coast and Preston but also makes it likely that large scale employment developments will proceed in North West Preston, adjacent to the boundary with Fylde Borough which will provide further competition.
- 10.48 Elsewhere the National Cyber Force Campus, at the Samlesbury Enterprise Zone will compete for high tech labour across Lancashire. However, with the completion of the Samlesbury Enterprise Zone, investors will need to look for alternatives, increasing opportunities in the Blackpool and Fylde Enterprise Zones.

EMPLOYMENT LAND SUPPLY

Blackpool

- 10.49 This Study has examined the 13 Employment Areas of Blackpool Borough and considered opportunities for redevelopment and expansion, which could provide brownfield employment development land for the Borough. This identified a baseline supply of 17.94 ha in seven sites, largely reflecting the supply identified in the Employment Land Update 2021 and Blackpool Airport Enterprise Zone Topic Paper' (2022). Excluding land already developed or being held for the exclusive use of specific businesses gives a realistic supply of 12.96 ha in five sites.
- 10.50 11.20 ha or 86.4 percent of this is within the Blackpool Airport Enterprise Zone, which does reflect business demand which is, as noted, concentrated on sites in the Squires Gate and Whitehills area. However, it does mean that opportunities elsewhere in Blackpool Borough are limited, although Central Blackpool (i.e. Blackpool Town Centre and surrounding areas) will benefit from a diverse range of regeneration initiatives.
- 10.51 No office uses are proposed, or likely, on any of the plots suggesting that future office requirements will need to be met in Central Blackpool and on immediately adjacent sites in Fylde Borough. In this regard, the development of the Knowledge Quarter scheme at Blackpool Airport Enterprise zone, falling into Fylde, would deliver up to 15 office or data centre properties totalling 70,355 sqm (gross) fronting the A5230 Squires Gate Lane and is thus well able to support the Blackpool market.

Fylde

- 10.52 A baseline supply of 56.35 ha, in 11 sites, was identified in Fylde Council's latest Business and Industrial Land Schedule (March 2023). Excluding land which is undevelopable and adjusting land to reflect the aspirations of landowners gives an increased realistic supply of 56.61 ha in ten sites.
- 10.53 84.7 percent of Fylde Borough's supply is focused at Whitehills and nearby Squires Gate, which again reflects the focus of market demand on the M55 Corridor. It does mean that growth options in Lytham, St Annes and Kirkham/Wesham are limited to one or two local sites. There are no growth options in smaller settlements such as Warton and Freckleton although stakeholders do not identify demand in these locations.

10.54 As with Blackpool it is expected that most development will be for industrial and warehouse uses, reflecting wider demand. Again, however, a large scale office development at Blackpool Enterprise Zone will benefit both Blackpool and Fylde.

Wyre

10.55 From a maximum supply of 52 sites, Local Plan allocations and outstanding consents, a baseline supply of 35.82 ha in 13 sites is identified, excluding non-relevant consents. This reduces, very slightly to a realistic supply of 35.08 ha in 11 sites, primarily through a revised estimate of the available land at WY1 Fleetwood Dock and Marina, Fleetwood and WY2 Hillhouse Technology Enterprise Zone, Thornton.

10.56 Additionally, three sites – WY5 Land West of the A6, Garstang (4.68 ha), WY7 Land West of Great Eccleston (1.00 ha), WY8 Forton Extension, Forton (1.00 ha) – are now consented for mostly residential schemes with plots set aside for E(g)/B-Class uses. The employment sites have not attracted market interest to date. Discussions with the housebuilders, and their agents, suggest that the respective housing schemes will open up and provide infrastructure for the employment land. It is likely that once the sites are opened up, market interest will improve, particularly at key locations off the A6. On site WY4 South of Goose Lane, Catterall (1.00 ha) it is understood the owner is seeking a revised scheme focused on services and trade uses. It is recommended that a full marketing exercise of any employment site should be required once the necessary infrastructure is provided for the employment site, before any site is lost to an alternative use.

10.57 Therefore, a worst case scenario is also put forward, assuming that all these sites are ultimately lost, in full, to non E(g)/B-Class uses – 27.40 ha in nine sites.

10.58 The realistic supply is relatively evenly distributed between the A6 Corridor, Thornton/Cleveleys and Fleetwood, with around 11 ha each, as shown in Table 100. However, the loss of the four sites mentioned above would also reduce the supply along the A6 Corridor to 6.17 ha, with a heavy dependence on a single site, WY3 Riverside Industrial Park Extension, Catterall (3.42 ha) which still has some constraints to delivery to address. Under the worst case scenario there would also be no available land in the rural area.

Table 100 – Wyre Borough Supply Location Assessment

Location	Supply, ha	
	Realistic Supply	Worst Case Scenario
A6 Corridor – Garstang/Catterall	11.85	6.17
Thornton/Cleveleys	11.02	11.02
Fleetwood	10.21	10.21
Rural – Great Eccleston and Forton	2.00	0
Total	35.08	27.40

Source: BE Group, 2023

- 10.59 Additionally, if, as seems most likely, the remaining employment land at WY1 Fleetwood Dock and Marina, Fleetwood (8.1 ha) is taken up for the exclusive use of Fisherman's Friend then the supply in the Wyre Peninsula will be focused in WY2 Hillhouse Technology Enterprise Zone, Thornton which is increasingly meeting both local and strategic needs and again, has uncertainties about the scale and nature of the employment land which can ultimately be delivered.
- 10.60 Under the worst case scenario, there is potential for sites to be lost to a non employment use if adequate marketing is undertaken. This creates uncertainty throughout Wyre's employment land supply, and under such scenario, the Council may need to consider if there is an initial case for further employment land allocations, something discussed further below in relation to the OAN.
- 10.61 The vast majority of land in Wyre is proposed for industrial and warehouse uses only, mostly aimed at meeting local needs for units of sub 500 sqm each, which does reflect market demand. As noted, an improving national economy from 2025 onwards will increase the likelihood of larger industrial and warehouse units being delivered. At present, however, only at WY2 Hillhouse Technology Enterprise Zone, Thornton are multiple plots provided which could support larger business requirements.
- 10.62 Hillhouse is also the only location where offices are proposed, primarily on New Plot E (2.56 ha) where a speculative office development of up to 29,922 sqm is suggested. Also Plot G (1.02 ha) where 4,090 sqm of offices is proposed. Given the uncertainties in the local office market, outside of public sector change, demand for this scale of offices here

will need to be tested further. Also, given issues of viability in larger office schemes, even in town and city centres, large scale delivery here is unlikely without public sector support or cross funding from other large projects in the area. The delivery of offices thus remains aspirational at this time, and the best options for new office development remain at Squires Gate, serving the whole Fylde Coast.

- 10.63 Two other sites, safeguarded for E(g), B2, B8 uses in the Wyre Local Plan (2011-2031) (2023), WY14 Port of Fleetwood, Fleetwood and WY15 Brockholes Industrial Estate Extension, Catterall, totalling 40.11 ha, were also reviewed. However, both sites have significant physical constraints which impact on viability and render them undevelopable, for employment uses at least. They therefore cannot be recommended for allocation as employment sites.

EXISTING EMPLOYMENT AREAS

- 10.64 86 Employment Areas – 13 in Blackpool, 39 in Fylde and 34 in Wyre – have been assessed. Five areas, four in Fylde, one in Wyre, were identified as not being primarily occupied by E(g)/B-Class uses and not recommended for protection for such uses in emerging Local Plans. One area in Wyre fell within another, larger employment area and was also excluded. This left 80 Areas, suitable for further consideration, which were assessed and graded A-E, as defined in Table 101. Collectively they provide some 595 ha of land primarily in E(g)/B-Class employment use, containing nearly 1.23 million sqm of floorspace comprising 181 ha (553,309 sqm) in Blackpool, 283 ha (333,894 sqm) in Fylde, 131 ha (340,457 sqm) in Wyre.

Table 101 – Grades Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly in the Local Plan Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, E(g), B2 and B8, including some new inward investors.	Protect strongly in the Local Plan Support and expand
C	Key employment sites with an influence over the whole local authority area, but primarily geared towards local businesses and E(g)(iii) light industrial, B2 and B8 uses.	Protect in the Local Plan Support
D	Lower quality locations in residential or rural areas suffering from poor accessibility and massing.	Continue to protect/review through the Local Plan
E	Very poor quality areas. Widespread vacancy and dereliction in poor environments. Or areas which have been, or are in the process of being, lost to other uses.	Promote alternative uses if possible

Source: BE Group 2024

10.65 Table 102 summarises the Existing Employment Areas by each of the above grades.

Table 102 – Existing Employment Areas Appraisal by Category

Grade	Blackpool No. of Sites	Fylde No. of Sites	Wyre No. of Sites
A	1	2	-
B	2	6	-
C	8	17	17
D	-	8	15
D/E	1	-	-
E	1	2	-
N/A	-	4	1
Total	13	39	33⁶⁹

Source: BE Group, 2024

10.66 In terms of the 80 Existing Employment Areas still mostly in E(g)/B-Class uses, the following can be noted:

- All of the 80 Areas were well occupied (except for Warbreck Hill, Blackpool, noted below) with no significant areas of void premises. This shows that most of these locations are functioning well and still providing the premises offer which at least local firms require. Conversely, this also means that there are few opportunities for redevelopment or infill development within this brownfield land.
- Few Areas have major infrastructure and access constraints. This reflects the fact that many of the Employment Areas are located directly off strategic roads. Inevitably, rural locations have more access issues but none of the Areas could not facilitate HGV access, relative to the size of the location. In most cases the main barrier to access is on-street car parking. Locations in the east of Fylde Borough, most notably the major employment sites of BAE and Westinghouse Springfield, will benefit from the new Junction 2, M55 which provides more direct motorway access. Previously, for BAE Warton, the most direct motorway access would have been north to Junction 3, M55 via rural roads. Motorway access for Westinghouse Springfield would have required passing through the Preston settlement area.

⁶⁹ Long Acres Farm falls into the allocated Employment Area Longacres Business Park, Stalmine and is reviewed in combination with that Employment Area.

- Particular constraints, on other infrastructure such as power, water, broadband access, etc. were also not evident in stakeholder comments.
- The industrial and warehouse stock mostly comprises units of less than 1,000 sqm in size which does reflect local demand but provides few larger units which could be marketed to larger firms. As is noted in the stakeholder engagement conclusions, larger employers in the Fylde Coast have long observed a lack of larger units to meet their needs and are progressing their plans to allow growth.
- The market assessment identified a shortage of industrial, and warehouse units of up to 4,000 sqm. This shortage is across the Fylde Coast, although with a focus on locations with good access to the M55 Corridor. Developments of sub-500 sqm industrial units are being progressed across the Fylde Coast, which will meet a lot of local needs. Developments of such sub-4,000 sqm properties are on hold at present, but improving macroeconomic conditions are expected to prompt private sector delivery from 2025 onwards and local authority planning and economic development policy should look to encourage this
- In terms of offices, smaller offices of sub 200 sqm each, in multi-occupancy schemes, can be found in a range of locations across the Fylde Coast but larger offices, which could allow business growth and be marketed to inward investors, are only found in a couple of locations focused around Blackpool Airport Enterprise Zone and Whitehills. These locations also provide almost all the high quality stock on the Fylde Coast, at least outside of town centres. As with the industrial stock, the local office schemes are all over 90 percent occupied which shows their continuing value to the local economy but also provides few opportunities for refurbishment, etc., to meet the changing needs of occupiers which were discussed above. Viability issues also make the development of new private sector offices unlikely, without public sector support, something which needs to be considered in redevelopment plans.
- In Blackpool, Warbeck Hill which provides some 28,654 sqm of offices is vacant and likely to be lost to alternative, non E(g)/B-Class Uses. Although this will represent a reduction in Blackpool's overall quantum of stock, even with the completion of new public sector offices in Blackpool Town Centre, the broader impacts of this loss would be modest as this older, ex-public sector office property could not meet modern, private sector occupier needs without very extensive refurbishment or indeed redevelopment. In the long term, the Preston New Road (NS&I) area may become vacant, and the office building would face similar issues, particularly as it is located in a mostly residential area, distant from other employment uses. Hence Preston New Road is given a D/E Grading, reflecting the uncertainty over its future.

- Apart from Warbeck Hill and Preston New Road (NS&I), only Freckleton Boatyard and Carr Farm, Lodge Lane, Warton, both in Fylde, received a 'E' (or D/E) Grading, accommodating only a couple of micro businesses, in largely very low grade stock. They do not merit ongoing protection, for E(g)/B-Class uses in the Local Plan.

10.67 Flagship locations, graded A-B which merit particular protection in the Local Plans of the local authorities are:

Blackpool

- Devonshire Road / Mansfield Road
- North Blackpool Technology Park
- Blackpool Enterprise Zone - Blackpool Business Park / Squires Gate Estate / Sycamore Trading Estate.

Fylde

- Blackpool Airport, Squires Gate
- Whitworth Street, Wesham
- Westinghouse Springfield, Salwick
- BAE Systems, Warton
- Whitehills Park, Whitehills
- AXA/AEGON Offices, Ballam Road, Lytham
- Jubilee House, Lytham
- Mill Farm, Wesham.

10.68 Locations in Wyre are all graded C-D and thus meet more local business needs. As noted however, they continue to generate economic value and still deserved broad protection in Policy.

OBJECTIVELY ASSESSED NEEDS

10.69 There is no definitive model for forecasting future employment land need. Here future employment land provision has been assessed using a projection forward of historic land take-up as well as 'Policy On' and 'Policy Off' forecasts based on employment sector change.

10.70 Three alternative forecast options have been produced and considered for the period of 2022-2042 for Blackpool, Fylde and Wyre.

10.71 Model One is Labour Demand, a baseline or Policy-Off forecast which makes no allowance for major public policy interventions on the Fylde Coast. It uses, as its base, the Cambridge Econometrics forecast of jobs change, by sector, over 2022-2042. That forecast projected a gain of 9,262 jobs across the Fylde Coast – 3,993 in Blackpool, 1,808 in Fylde, 3,461 in Wyre – to 2042.

10.72 To use these figures to forecast OAN in the Fylde Coast, several adjustments must be made to allow for real world conditions:

- An allowance is made for part time working in the labour force, by converting the forecasts for total employment, by sector, into forecasts for Full-Time Equivalent (FTE) jobs by sector. This is achieved through an analysis of the proportion of full-time and part-time jobs in Blackpool, Fylde and Wyre as of 2022, using BRES data. It shows that the Fylde Coast is forecast to gain 7,031 FTE jobs to 2042 – 3,240 in Blackpool, 1,072 in Fylde and 2,729 in Wyre.
- The second consideration is homeworking, which affects the number of new jobs which need to be accommodated in commercial premises, and therefore need employment land. The 2021 Census identified homeworking rates of 20.2 percent in Blackpool, 31.8 percent in Fylde and 26.1 percent in Wyre, mostly impacting on office based sectors. Reducing the relevant, office-based sectors by the above proportions, to exclude jobs which would be mostly home based reduces the FTE employment growth over 2022-2042 to 5,707 jobs across the Fylde Coast, comprising 2,916 extra jobs in Blackpool, 437 extra jobs in Fylde and 2,354 extra jobs in Wyre. However, 2021 Census data was collected at a time when the UK was still experiencing lockdowns associated with the Covid-19 Pandemic, it may therefore exaggerate present homeworking rates. Stakeholders argue that homeworking and particularly hybrid working is continuing in office based businesses locally although they were unable to define the exact amounts of contemporary, or future, home based working. Reflecting this uncertainty, scenarios are presented with and without a deduction for homeworking.

10.73 The FTE jobs change figures are converted into a floorspace and land need using standard estimates of jobs density, the floorspace each job requires, and estimates of what proportion of the jobs will be accommodated in E(g)/B-Class property. When the resulting land needs from the office, industrial and warehouse sectors are combined, the following OAN can be identified, with and without a deduction homeworking:

Blackpool

- Without a Reduction for Homeworking – 580 extra jobs in relevant sectors (3,230 extra jobs across all sectors), equating to a negative requirement of -2,398 sqm of floorspace and -0.60 ha of land, i.e. the local authority area needs less premises/land than it presently has.
- With a Reduction for Homeworking – 393 extra jobs in relevant sectors (2,916 extra jobs across all sectors), equating to a negative requirement of -5,027 sqm of floorspace and -1.26 ha of land, i.e. the local authority area needs less premises/land than it presently has.

Fylde

- Without a Reduction for Homeworking – -1,238 less jobs in relevant sectors (1,072 extra jobs across all sectors), equating to a negative requirement of -102,721 sqm of floorspace and -25.68 ha of land, i.e. the local authority area needs less premises/land than it presently has.
- With a Reduction for Homeworking – -1,633 less jobs in relevant sectors (438 extra jobs across all sectors), equating to a negative requirement of -108,249 sqm of floorspace and -27.06 ha of land, i.e. the local authority area needs less premises/land than it presently has.

Wyre

- Without a Reduction for Homeworking – 491 extra jobs in relevant sectors (2,729 extra jobs across all sectors), equating to a negative requirement of -5,194 sqm of floorspace and -1.3 ha of land, i.e. the local authority area needs less premises/land than it presently has.
- With a Reduction for Homeworking – 266 extra jobs in relevant sectors (2,354 extra jobs across all sectors), equating to a negative requirement of -8,342 sqm of floorspace and -2.09 ha of land, i.e. the local authority area needs less premises/land than it presently has.

10.74 However, the net outputs are severely limited by the large declines in manufacturing employment predicted in the model, which does not reflect a real world position in which manufacturing firms may seek growth for a range of reasons unrelated to how many they employ. Accordingly, there is a case for excluding the industrial change in this scenario and looking at the office and warehouse forecasts, where growth is projected. This gives needs of:

Blackpool

- Without a Reduction for Homeworking – 989 extra jobs in relevant sectors equating to a need of 17,643 sqm of floorspace and 4.41 ha of land of which *3.23 ha is purely office land and 1.18ha is for warehousing.*
- With a Reduction for Homeworking – 802 extra jobs in relevant sectors, equating to a need of 15,014 sqm of floorspace and 3.75 ha of land of which *2.57 ha is purely office land and 1.18ha is for warehousing.*

Fylde

- Without a Reduction for Homeworking – 1,317 extra jobs in relevant sectors, equating to a need of 22,474 sqm of floorspace and 5.62 ha of land of which *4.36 ha is purely office land and 1.26 ha is for warehousing*
- With a Reduction for Homeworking – 922 extra jobs in relevant sectors, equating to a need of 16,946 sqm of floorspace and 4.24 ha of land of which *2.98 ha is purely office land and 1.26 ha is for warehousing.*

Wyre

- Without a Reduction for Homeworking – 892 extra jobs in relevant sectors, equating to a need of 14,455 sqm of floorspace and 3.61 ha of land of which *3.00 ha is purely office land and 0.61 ha is for warehousing.*
- With a Reduction for Homeworking – 667 extra jobs in relevant sectors, equating to a need of 11,307 sqm of floorspace and 2.82 ha of land of which *2.21 ha is purely office land, and 0.61 ha is for warehousing.*

10.75 Model Two is a Labour Demand 'Policy On' scenario which provides a sensitivity test of the baseline forecasts against existing and emerging strategic policy initiatives, specifically the Enterprise Zones present in Blackpool, Fylde and Wyre, combined with key regeneration projects in Central Blackpool. In the case of the Warton (Fylde) and Hillhouse (Wyre) Enterprise Zones there is insufficient clarity as to the scale and nature of likely projects, on a plot by plot basis, to produce a clear projection of the additional jobs which might be generated here. Only Blackpool Airport Enterprise Zone has clearly defined, strategic level projects in the pipeline which will generate understandable jobs increases above the baseline forecast.

- 10.76 Allowing for identified development plans at the Blackpool Airport Enterprise Zone, jobs densities in the premises to be developed, additionality and the proportion of jobs which would be displaced from elsewhere in the Fylde Coast, the Enterprise Zone will generate 2,627 additional jobs in total, 2,414 in the office focused Knowledge Quarter, 213 in the Aviation Quarter, for manufacturing sectors. All these jobs will need to be accommodated in the portion of the Enterprise Zone which falls into Fylde Borough.
- 10.77 The Study was also asked to consider the jobs impact of the main new build commercial projects of Blackpool's £2 billion Growth and Recovery Programme, to be undertaken in Central Blackpool, specifically the Talbot Gateway (including Multiversity) and Blackpool Central programme areas. Those projects are estimated to generate 1,630 jobs in total, of which 614 would be additional. However, in the Blackpool Central programme area this employment is mostly derived from the new retail, food and beverage and theme park facilities. None of these additional jobs are in sectors which could require office, industrial or warehouse space, affecting the OAN forecasting for Blackpool.
- 10.78 In the Talbot Gateway programme area, the main office based scheme underway at this time, is the 20,000 sqm Civil Service Hub on King Street, Talbot Gateway. This facility will accommodate the relocation of existing DWP staff from elsewhere, however. Any new jobs created here will be negligible.
- 10.79 Also proposed is Talbot Gateway Phase 5, a new build 4,919 sqm office. Negotiations are underway with an occupier who could bring some 1,000 jobs into the area, of which at least half could be new. However, at the time of writing there was a lack of clarity about who that new occupier will be, their nature and business sector, and if they represent inward investment for Blackpool or the relocation/expansion of an existing local organisation. Thus, at this time only Blackpool Airport Enterprise Zone has clearly defined, strategic level projects in the pipeline which will generate understandable jobs increases above the baseline forecast.
- 10.80 The jobs generated by the Blackpool Airport Enterprise Zone, only, are used to provide a revised Policy On calculation of forecast land needs in Fylde Borough only, utilising the same forecast method as the baseline forecast but with the inclusion of the additional jobs. As for the Policy Off forecast, the loss of manufacturing jobs pushes the net forecast into the negative, which is unrealistic when set against market demand and real world conditions. Excluding manufacturing change gives the following OANs for Fylde Borough:

- Without a Reduction for Homeworking – 4,479 extra jobs in relevant sectors (3,455 extra jobs across all sectors), equating to a requirement of -14.16 ha of land, i.e. the local authority area needs less premises/land than it presently has of which *12.24 ha is purely office land and 1.92 ha is for warehousing.*
- With a Reduction for Homeworking – 3,125 extra jobs in relevant sectors (+2,101 extra jobs across all sectors), equating to a requirement of 10.26 ha of land of which *8.34 ha is purely office land and 1.92 ha is for warehousing.*

10.81 Model Three is Past Take Up, the forward projection of historic take up in the three local authority areas since 2001/2002. In the case of Blackpool, take up in the 2000s is inflated by direct investment, by Single Regeneration Budget Challenge Fund finance, in commercial development on Blackpool Council owned sites. This is a situation which is unlikely to be repeated in the future. Accordingly, for Blackpool only, Model Three projects forward historic take up from 2012/2013 onwards. This gives an average annual take up rate for projection forward.

10.82 This annual take up rate can then be compared to rates of recorded loss of employment land, to non E(g)/B Class uses, to understand, and project forward the realistic rate of development in the Fylde Coast Local Authority Areas. In all three local authority areas the amount of loss, since 2011 at least, exceeds (or nearly exceeds in the case of Fylde) recorded completions on an average annual basis. Taking losses from completions thus leads to negligible or negative OAN projections which don't allow for any significant economic growth on the Fylde Coast to 2042.

10.83 However, not all losses automatically need to be accounted for in OAN figures. While some losses may solely reflect the desire of landowners to convert sites/buildings to higher value uses, the properties lost may also be of a specification, quality, tenure or in a location that is no longer desired by the market. The survey of Employment Areas, summarised in Section 7.0, suggests that the Fylde Coast does not have a particular problem with large amounts of low grade stock. Also, given the high demand for floorspace in the sub-region, versus the low available supply, it is likely that if the individual buildings recorded lost were still needed by the market, they would have been occupied.

10.84 Older offices are least likely to be needed by the market. Many of the larger losses of office stock recorded were older public sector buildings, with a historic specification which would not meet modern occupier needs. Constrained market demand for offices,

both today and in the recent past, also makes it unlikely that large older properties would have been re-occupied by E(g)(i) businesses. Most of the office sites lost were in settlement areas, bounded by housing. Therefore, it cannot be assumed that they could have been redeveloped for industrial or warehouse uses which might be in more demand by the market.

10.85 Reflecting the above, adjusted loss figures are given which account for recorded industrial and warehouse losses only. Table 103 summarises the final annual take up and adjusted losses rates used in this Study, and the OAN projections resulting.

Table 103 – Take Up OAN Projections Summary, ha

Local Authority Area	Hectares/Year			OAN 2022-2042 (Revised Annual Take Up Rate x 20)
	Annual Take Up Rate	Adjusted Losses Rate	Revised Annual Take Up Rate (Take Up Minus Losses)	
Blackpool	0.62	0.05	0.57	11.40
Fylde	1.71	0.88	0.83	16.60
Wyre	1.82	0.75	1.07	21.40
Fylde Coast Total	4.15	1.68	2.47	49.40

Source: BE Group, 2024

10.86 The findings of the three models are summarised in Tables 104 to 106.

Table 104 - Blackpool OAN Projections 2022-2042, ha

Sector	Labour Demand, Policy Off		Past Take Up
	Without a Deduction for Homeworking	With a Deduction for Homeworking	With an Adjusted Deduction for Industrial/warehouse Losses
Office (inc. Research and Development)	3.23	2.57	-
Industrial	-5.01	- 5.01	11.40 ⁷⁰
Warehouse	1.18	1.18	
Total	-0.60	-1.26	11.40

Source: BE Group, 2023

Table 105 - Fylde OAN Projections 2022-2042, ha

Sector	Labour Demand, Policy Off		Labour Demand, Policy On		Past Take Up
	Without a Deduction for Homeworking	With a Deduction for Homeworking	Without a Deduction for Homeworking	With a Deduction for Homeworking	With an Adjusted Deduction for Industrial/warehouse Losses
Office (inc. Research and Development)	4.36	2.98	12.24	8.34	-
Industrial	- 31.30	- 31.30	- 30.67	-30.67	16.60 ⁷¹
Warehouse	1.26	1.26	1.92	1.92	
Total	-25.68	-27.06	-16.51	-20.41	16.60

Source: BE Group, 2023

⁷⁰ It is assumed that future take up will be primarily/exclusively for industrial and warehouse uses, reflecting past completion trends since 2012/2013, as well as the private sector development proposed at this time

⁷¹ As noted in Paragraph 8.53, a split of past completions by use class is not available for Fylde. However, take up can be assumed to be primarily/exclusively industrial and warehouse based on past trends which have only seen a very limited delivery of new offices at Whitehills Business Park. New offices are only in the pipeline at Blackpool Airport Enterprise Zone, something accounted for in the Labour Demand, Policy On model.

Table 106 - Wyre OAN Projections 2022-2042, ha

Sector	Labour Demand, Policy Off		Past Take Up
	Without a Deduction for Homeworking	With a Deduction for Homeworking	With an Adjusted for Industrial/warehouse Losses
Office (inc. Research and Development)	3.00	2.21	2.61
Industrial	-4.91	- 4.91	9.41
Warehouse	0.61	0.61	9.38
Total	-1.30	-2.09	21.40⁷²

Source: BE Group, 2023

10.87 A buffer of 3 years, or an extra 15 percent, is also applied to the above OAN figures to provide a choice of sites by size, quality and location, allow for exceptional losses, particularly through Permitted Development, and to provide a continuum of supply beyond the end of the forecast period.

10.88 In terms of a preferred OAN for offices, experience suggests that the quantum of office space required by businesses is strongly driven by the number of staff they have to accommodate. Thus, the jobs-based Labour Demand model is likely to best project office sector needs moving forward. As the majority of projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward.

10.89 Discussions with stakeholders suggest that some two years after the end of the Covid-19 Pandemic and associated Lockdowns, homeworking and hybrid working practices are here to stay with impacts on the quantum of space businesses need. While it is not possible to say exactly how working practices will evolve to 2042, Labour Demand models with an allowance for homeworking are more realistic at this time. By local authority area, the recommended office sector OANs are shown below. **All figures include a 15 percent buffer for flexibility and choice:**

- **Blackpool – 2.96 ha**
- **Fylde – 9.59 ha.** Here the Policy On forecast is recommended as providing the most complete picture of employment change in the Borough, and particularly accounting

⁷² The split of Past Take Up OAN, by Use Class, reflects patterns in recorded completions and losses since 2011/2012

for the Knowledge Quarter, Blackpool Airport Enterprise Zone, the largest office development likely on the Fylde Coast to 2042

- **Wyre – 2.54 ha.**

10.90 Requirements for industrial and warehouse premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker. Industrial and warehouse companies are also more likely to acquire and hold onto expansion land and premises, even in times of contraction in the business, than office sector companies, in anticipation of future growth. This results in a weaker link to the jobs-based Labour Demand modelling that was true for offices. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector, across the Fylde Coast, which is at odds with identified market demand and the almost exclusively industrial pipeline of development identified on local employment sites.

10.91 Here, therefore, the Past Take Up model is preferred as it is independent of jobs change projections and based on real world trends. It accounts for periods of growth and recession in the local economy since 2000, allowing that such economic growth and decline will continue to 2042. It is thus likely to be better in tune with real market demand than the Labour Demand model. By local authority area, the recommended industrial/warehouse sector OANs are shown below. Where possible an allowance has been made for any office based take up which may have been included in the model data and would lead to double counting with the Office OAN model above, although the specific approach used on this matter depends on the monitoring data available from each local authority. All figures include a 15 percent buffer for flexibility and choice:

- **Blackpool – 13.11 ha.** N.B. The past take up this projection is based on has exclusively comprised the completion of industrial and warehouse uses
- **Fylde – 19.09 ha.** N.B. As noted in Paragraph 8.53, a split of past completions by use class is not available for Fylde. However, take up can be assumed to be primarily industrial and warehouse based on past trends which have only seen a very limited delivery of new offices at Whitehills Business Park.
- **Wyre – 21.61 ha.** N.B. Here a deduction of 12.21 percent is made to allow for the percentage of take up which is likely to be office based, reflecting past completion trends since 2011/2012. This deduction is made to avoid double counting with the

preferred office OAN forecasting model, noted above.

10.92 How the preferred OAN figures are derived is summarised in Table 107.

Table 107 – Preferred OAN Summary

Sector	Base Requirement	Addition – Displacement	Addition – Buffer (15 Percent Uplift)	Final OAN
Blackpool				
Office (inc. R&D) <i>(Need based on Labour Demand, Policy Off)</i>	2.57 <i>(From FTE Jobs Growth, with a 20.2 percent reduction for homeworking)</i>	N/A	+0.39	2.96
Industrial/Warehouse <i>(Need based on Past Take Up, with an adjustment for industrial/warehouse losses)</i>	11.40 <i>(0.57 ha/year x 20)</i>	N/A	+1.71	13.11
Total	13.97	-	+2.10	16.07
Fylde				
Office (inc. R&D) <i>(Need Based on Labour Demand, Policy On)</i>	8.34 <i>(From FTE Jobs Growth, with a 31.8 percent reduction for homeworking)</i>	N/A	+1.25	9.59
Industrial/Warehouse <i>(Need based on Past Take Up, with an adjustment for industrial/warehouse losses)</i>	16.60 <i>(0.83 ha/year x 20)</i>	N/A	+2.49	19.09
Total	24.94	-	+3.74	28.68
Wyre				
Office (inc. R&D) <i>(Need Based on Labour Demand, Policy Off)</i>	2.21 <i>(From FTE Jobs Growth, with a 26.1 percent reduction for homeworking)</i>	N/A	+0.33	2.54
Industrial/Warehouse <i>(Need based on Past Take Up, with an adjustment for industrial/warehouse losses)</i>	18.79 <i>(1.07 ha/year x 20 = 21.4 ha. Less 12.21 percent) (A reduction of 12.21 percent is made to allow for the percentage of take up which is likely to be office based, to avoid double counting with the office OAN forecasting model.)</i>	N/A	+2.82	21.61
Total	21.00	-	+3.15	24.15

Source: BE Group, 2024

PROTECTING SUPPLIES AND MEETING THE NEEDS

10.93 Combining the office, industrial and warehouse requirements gives an OAN for the Fylde Coast, to 2042 of 68.90 ha, comprising:

- Blackpool: 16.07 ha
- Fylde: 28.68 ha
- Wyre: 24.15 ha.

10.94 Deducting the supply of 104.65 ha across the Fylde Coast, identified above indicates the following:

- Blackpool: 12.96 ha (supply) less 16.07 ha (OAN) = **-3.11 ha (further need)**
- Fylde: 56.61 ha (supply) less 28.68 ha (OAN) = **+27.93 ha (surplus supply)**
- Wyre: 35.08 ha supply (27.40 ha as a worst case scenario) less 24.15 ha (OAN) = **+3.25-10.93 ha (surplus supply).**

10.95 To meet the above needs, the following conclusions can be made, by local authority area.

Blackpool – Office OAN

- Quantitative Land Need – 2.96 ha, which equates to 11,840 sqm of floorspace at 4,000 sqm/hectare (densities could be higher in Blackpool Town Centre).
- Jobs Need – Premises to support a forecast gain of 840 office jobs or 733 FTE jobs, of which 585 will require office space, excluding likely homeworkers. Growth is expected to focus in ICT and business support sectors.
- Market Need – Modern office stock, in prominent accessible locations, offering suites of 0-200 sqm in flexible schemes where businesses have flexibility to expand or contract their floorspace in response to changing working practices. Leasehold space most commonly required.

10.96 None of the existing Blackpool employment land supply is expected to deliver office space. However, there are still options to meet the office requirement:

- Blackpool Town Centre could potentially provide opportunities for office development most notably through regeneration projects for later phases of the Central Business District (Talbot Gateway) with public sector support and could be usefully explored in the new Blackpool Local Plan.

- Refurbishments of existing properties to accommodate office based businesses remain possible as the construction costs associated with such changes of use are far smaller than new build developments.
- Close to the Blackpool Borough boundary, Employment site FY5: Blackpool Airport Enterprise Zone, Squires Gate within Fylde Borough is most likely to come forward for the provision of a high tech office park or 'Knowledge Quarter' of up to 70,355 sqm of gross floorspace (supporting some 2,414 net additional jobs, as identified in Paragraph 8.33). Although this remains subject to funding, developer and business interest, even a reduced office scheme here could meet the office needs for both Blackpool and Fylde, (a combined OAN of circa 50,200 sqm) supporting cross boundary employment growth. Through Local Plan development, Blackpool Council should engage with Fylde Council to explore the opportunity for this site to collectively accommodate the sub-regional office need of the two local authorities, in terms of its employment land outputs. This would reflect both the modest supply shortfall in Blackpool Borough and the supply surplus in Fylde Borough.

10.97 It should be highlighted that in Blackpool Borough, viability constraints mean that private sector office development is unlikely, without public sector financial support.

10.98 It should also be noted that a proportion of the additional E(g)(i) jobs forecast will be accommodated in any B2/B8 properties developed. Modern industrial and warehouse units increasingly combine administrative functions with production and logistics functions, on single sites for greater efficiency. For example, the 2023 research paper 'Critical Infrastructure: Driving Employment Growth within the UK's Logistics Sector' by Prologis indicates that an average 46,450 sqm B8 unit will employ 67 office staff and 45 managerial staff. This represented just under a quarter of the 480 total staff employed in that example facility.

Blackpool – Industrial/Warehouse OAN

- Quantitative Land Need – 13.11 ha
- Jobs Need – With forecast decline in manufacturing jobs, growth will focus in Construction (190 extra jobs, 179 FTE) and Land Transport (145 extra jobs, 136 FTE). Accommodating these sectors will mostly require warehousing, plus some offices
- Market Need – With the market generally delivering sub-500 sqm light industrial units, the main need, across the Fylde Coast is for mid-sized/larger industrial and

warehouse units of up to 4,000 sqm each to allow the growth of established local firms and attract inward investment. Interest is focused on sites with good links to the M55 Corridor, with requirements for both freehold and leasehold options.

10.99 Overall, Blackpool has circa 13 ha of land for industrial and warehouse uses, meeting the identified OAN (the difference between the supply, at 12.96 ha, and the need at 13.11 ha is a negligible 0.16 ha). This includes Site BB2: Eastern Gateway, which is programmed to deliver some of the mid-sized/larger industrial and warehouse units needed.

Fylde – Office OAN

- Quantitative Land Need – 9.59 ha, which equates to 38,360 sqm of floorspace at 4,000 sqm/hectare (densities could be higher in town centres).
- Jobs Need – Premises to support a forecast gain of 3,574 private sector office jobs or 3,262 FTE jobs, of which 2,225 will require office space, excluding likely homeworkers. Growth is expected to focus in ICT and Legal/Financial sectors.
- Market Need – Modern office stock, in prominent accessible locations on the M55 Corridor and in key town centres, offering suites of 0-200 sqm in flexible schemes where businesses have flexibility to expand or contract their floorspace in response to changing working practices. Leasehold space most commonly required.

10.100 Overall, Fylde has sufficient land to meet all its needs. As with Blackpool, no site should be allocated just for office uses given the viability constraints to development at present. However, there remains a strong desire for the development of office uses at FY5: Blackpool Airport Enterprise Zone, Squires Gate and a large scale development here could meet business needs in Fylde and Blackpool. If developed to its full extent, the Knowledge Quarter proposal within FY5: Blackpool Airport Enterprise Zone could provide 70,355 sqm of gross office and data centre floorspace, according to the latest available masterplanning. This would be sufficient to accommodate the combined office OANs of Blackpool and Fylde Boroughs – 50,200 sqm – comprising 11,840 sqm of need in Blackpool and 38,360 sqm of need in Fylde. Aspirations for office uses were also reported at FY10: Whyndyke Garden Village, Preston New Road, Whitehills.

10.101 None of the current regeneration programmes are likely to deliver office uses in the main town centres of Fylde Borough and given viability constraints, new build private sector office development appears unlikely outside of the sites referenced above. However,

refurbishments of existing properties to accommodate office based businesses remain possible as the construction costs associated with such changes of use are far smaller. In this regard it is noted that at least one small multi-occupancy business centre is proposed in Kirkham Town Centre, at 6-8 Freckleton Street.

10.102 Again, it must also be recognised that a proportion of the additional E(g)(i) jobs forecast will be accommodated in any B2/B8 properties developed, which combine administrative and production/logistics functions.

Fylde – Industrial/Warehouse OAN

- Quantitative Land Need – 19.09 ha
- Jobs Need – With forecast decline in manufacturing jobs growth will focus in Construction (531 extra jobs, 473 FTE) and Land Transport/Air Transport (270 extra jobs, 225 FTE). Accommodating these sectors will mostly require warehousing, plus some offices
- Market Need – With the market generally delivering sub-500 sqm light industrial units, the main need, across the Fylde Coast is for mid-sized/larger industrial and warehouse units of up to 4,000 sqm each to allow the growth of established local firms and attract inward investment. Interest is focused on sites with good links to the M55 Corridor, with requirements for both freehold and leasehold options.

10.103 Fylde Borough has sufficient land to meet its needs, 56.61 ha or nearly double its OAN. This supply is likely to be augmented by rural growth and development, particularly farm conversions to provide B8 storage accommodation. It should be noted that even if no allowance for losses is made in Model 3 Past Take Up calculations, Fylde Borough still has sufficient land to meet needs, i.e.

1.71 ha/year (take up rate with no allowance for losses) x 20 = 34.20 ha. Increasing to 39.33 ha with a 3 year buffer. Plus 9.59 ha Office OAN = 48.92 ha (maximum need).

10.104 47.97 ha or 84.7 percent of Fylde Borough's supply is focused at Whitehills and nearby Squires Gate, the identified focus of market demand, with another 4.20 ha close to Junction 3, M55 at Wesham. Options in Lytham, St Annes and Warton/Freckleton are more modest but there appears to be little case for further employment land allocations, above the existing supply. Options for additional employment land are assessed and graded in Section 9.0, however.

10.105 However, although there is flexibility in the supply it does not mean that sites can automatically be lost to other uses. Many of the allocated sites are subject to active development plans, while other sites are expected to see development if national economic conditions improve from 2025 onwards. Settlements such as St Annes, Lytham and Kirkham/Wesham are heavily dependent on single sites and loss of those sites would leave large areas of the Borough with no employment land supply. Also, as is noted in Paragraphs 10.25/10.37, the existing stock of premises is up to 98 percent occupied, giving little choice for businesses and strong pressure for delivery of further premises on the allocated employment sites. Finally, as noted above, there may still be a requirement to accommodate some of Blackpool's needs.

Wyre – Office OAN

- Quantitative Land Need – 2.54 ha, which equates to 10,160 sqm of floorspace at 4,000 sqm/hectare (densities could be higher in town centres).
- Jobs Need – Premises to support a forecast gain of 764 private sector office jobs or 673 FTE jobs, of which 497 will require office space, excluding likely homeworkers. Growth is expected to focus in ICT and Business support sectors.
- Market Need – Modern office stock, in prominent accessible locations on the M55 Corridor and in key town centres, offering suites of 0-200 sqm in flexible schemes where businesses have flexibility to expand or contract their floorspace in response to changing working practices. Leasehold space most commonly required.

10.106 Overall, Wyre has sufficient land to meet all its needs. As with Blackpool and Fylde, no site should be allocated just for office uses given the viability constraints to development at present. At the time of writing office uses are proposed at WY2: Hillhouse Technology Enterprise Zone, Thornton. However, such development remains aspirational.

10.107 None of the current regeneration programmes are likely to deliver office uses in the main town centres of Wyre Borough and given viability constraints, new build private sector office development appears unlikely outside of the sites referenced above. However, refurbishments of existing properties to accommodate office based businesses remain possible as the construction costs associated with such changes of use are far smaller.

10.108 Again, it must also be recognised that a proportion of the additional E(g)(i) jobs forecast will be accommodated in any B2/B8 properties developed, which combine administrative and production/logistics functions.

Wyre – Industrial/Warehouse OAN

- Quantitative Land Need – 21.61 ha
- Jobs Need – With forecast decline in manufacturing jobs growth will focus in Construction (471 extra jobs, 447 FTE) and Land Transport (73 extra jobs, 69 FTE). Accommodating these sectors will mostly require warehousing, plus some offices.
- Market Need – With the market generally delivering sub-500 sqm light industrial units, the main need, across the Fylde Coast is for mid-sized/larger industrial and warehouse units of up to 4,000 sqm each to allow the growth of established local firms and attract inward investment. Interest is focused on sites with good links to the M55 Corridor, with requirements for both freehold and leasehold options.

10.109 Overall, Wyre has sufficient land to meet its OAN, on the baseline employment land scenario, a surplus of 10.93 ha. However, if a worst case scenario is assumed where sites WY4, WY5, WY7 and WY8 are lost to alternative uses (as discussed in paragraph 10.56), that surplus reduces to only 3.25 ha. Also, under either scenario the Wyre Peninsula will be heavily dependent on WY2: Hillhouse Technology Enterprise Zone, Thornton to meet business needs. In particular this is the main site in Wyre which could deliver larger industrial and warehouse units, which the market needs, and enjoys some of the best links to the M55 in the realistic supply. While this Study has estimated a minimum supply of some 10.96 ha at WY2: Hillhouse Technology Enterprise Zone, and possibly more, this is at least partly dependent on investments into new road infrastructure which are not yet guaranteed.

10.110 The position in the A6 Corridor is slightly better, but if the worst case scenario is assumed (as discussed in paragraph 10.56) then this sub-area will be heavily dependent on Site WY3: Riverside Industrial Park Extension, Catterall (3.42 ha), a longer term development prospect, plus a number of smaller consents.

10.111 In a worst case scenario, there is uncertainty in Wyre's employment land supply. One option could be to safeguard some additional employment sites, in the next Local Plan, to provide a degree of contingency. Section 9.0 identified three options, put forward in Call for Sites for employment uses (amongst other possible uses), which score well when measured against market and deliverability criteria:

- Site CFS_2022_036: Westfield Farm, Claughton on Brock, Garstang, PR3 0PU (17.00 ha) – Site has some physical constraints, and visual impact, but if they can

be overcome would represent a significant further growth option for the adjacent Brockholes Employment Area and the A6 Corridor more generally.

- Site CFS_2023_078: Old Holly Farm, Cabus, Preston, PR3 1AA (3.49 ha) – More rural than other options and detached from the settlement but still prominently located on the A6, a focus for market interest, with few constraints to development.
- Site CFS_2023_106: Land at Brock, Garstang Road, Bilsborrow, Preston, PR3 0BT (2.15 ha) – Consent for 13 E(g)/B8 units is actively being sought here, on an A6 site which links well to Garstang and Catterall. The site falls into Flood Zone 3 however, and it has yet to be determined if the mitigation proposals put forward in the application address this major constraint.

10.112 These total 18.34 ha of potential supply, in greenfield locations. All are in the A6 Corridor, however, with no deliverable options identified for the Wyre Peninsula.

10.113 The worst case scenario would also leave the Rural Area with no further allocated employment land options. However, stakeholders did not identify an urgent need for land here. Additionally, rural Wyre (and rural Fylde) are seeing regular farm conversions, particularly to B8 storage uses. This suggests that local businesses, and landowners, are working proactively to meet their own needs.

APPROACH TO MONITORING

10.114 Section 8.0 summarises how each local authority monitors change in its supply of E(g)/B-Class employment land. It notes that all three Local Planning Authorities are active in monitoring the full range of completions in the relevant sectors but that there is more variation in the monitoring of losses, with Fylde only recording losses where the site can never revert to employment use i.e. lost to residential redevelopment/refurbishment.

10.115 The progress of applications is generally checked through a range of sources including tax records, Google Maps/Streetview, contacts with stakeholders and links to Building Control records. Site visits are undertaken as required. Data on relevant applications, commitments, and completions is recorded in Excel or Access databases to provide the relevant monitoring data for the Authority Monitoring Reports and related updates, produced by each Council.

10.116 Some issues identified in existing monitoring processes, for the three Councils are:

- Sites are measured from the red line boundary in planning applications. Experience suggests that applicants can overestimate the area of land affected by a planning application.
- All losses should be monitored. However, the priority should be to identify losses which result in structural changes to land and property. Many changes of use consents, or permitted development changes, only result in a change in occupier with no significant structural changes to the property. Such losses may only prove temporary.
- Changes both inside and outside of allocated employment sites/Employment Areas should be monitored, which the Councils are doing. Some other changes which could usefully be identified and analysed include:
 - Changes within the E(g), B2, B8 Uses, although these do not represent a gain/loss of employment land
 - Monitoring the Growth of Trade Uses, which are an increasing feature on industrial estates
 - Monitoring Office Conversions, including Permitted Development changes, to understand changes in stock
 - Recording Changes of Use of Agricultural Buildings to B8 Storage, a key element of rural economic change in Fylde and Wyre.

10.117 Recording details on job generation, applicant/agent contacts and car parking details would also be beneficial to understand growth and change in these areas.

11.0 RECOMMENDATIONS

INTRODUCTION

- 11.1 This section sets out the consultants' recommendations arising from the Fylde Coast Economic Needs Update and Employment Land Review Study. The recommendations in this report have had full regard to the requirements of the new NPPF and PPGs to encourage and deliver growth through the planning system. It updates and supersedes previous Employment Land Studies produced by the three Councils.

EMPLOYMENT LAND SUPPLY AND NEED

Recommendation 1 – Defining and Protecting the Current Realistic Land Supply

- 11.2 For this study, the current realistically available employment land supply in Blackpool is 12.96 ha in five sites, based on a review of undeveloped land within the Borough's 13 Employment Areas, as identified in Table 54, Section 7.0. For Fylde the supply was 56.61 ha in ten sites, as identified in Table 58, Section 7.0. For Wyre the supply was 35.08 ha in 11 sites, as identified in Table 61, Section 7.0. Sites outside of this realistic employment land supply, were judged not to be readily available to meet employment land needs.
- 11.3 The remaining supply is, with the identified exceptions below, fully deliverable and in most cases subject to active plans for development which are being progressed. Issues in the supply include:

Blackpool

- BB7: Blackpool North Technology Park – Undeveloped land in the North (1.46 ha total) – Delivery of land in the south of this site is progressing. Another 0.88 ha remains available in the north, but it appears the consented/proposed development in the south will cut off this land from highways access. It needs to be confirmed that the 0.88 ha remains accessible before it is allocated again in the Blackpool Local Plan.

Fylde

- FY9: Cropper Road East, Whitehills (3.30 ha) – A backland site, it is likely to be of low market interest at present, but this will change as surrounding sites are taken up, increasing the adjoining critical mass. Masterplanning could usefully identify how the site would be accessed and identify a plan for delivery.

Wyre

- WY1: Fleetwood Dock and Marina, Fleetwood (8.10 ha) – Future development within the docks is expected to be for non E(g)/B-Class uses while the development of 8.10 ha for the south is expected to be developed for the exclusive use of Lofthouse (Fisherman’s Friend).
- WY2: Hillhouse Technology Enterprise Zone, Thornton (10.96 ha) – While there are strong aspirations for growth here and strong interest on a range of sites from businesses, questions remain about the deliverability and viability of some sites, particularly in the north of Hillhouse where development will be dependent on the delivery of a new road access across the railway.
- WY4: South of Goose Lane, Catterall (1.00 ha) – Consented for a light industrial scheme, the site owners are seeking a revised scheme which, if consented, would include hot food uses which would therefore reduce the net area of land and premises in E(g)/B-Class employment use.
- Three sites – WY7 Land West of Great Eccleston (1.00 ha), WY8 Forton Extension, Forton (1.00 ha) and WY5 Land West of the A6, Garstang (4.68 ha) – are now consented for mostly residential schemes with ancillary plots set aside for E(g)/B-Class uses. The ancillary sites have not attracted market interest to date. Discussions with the housebuilders, and their agents, suggest that the respective housing schemes will open up and provide infrastructure for the employment land. It is likely that once the sites are opened up, market interest will improve, particularly at key locations off the A6. It is recommended that a full marketing exercise of any employment site should be required once the necessary infrastructure is provided for the employment site before any site is lost to an alternative use.

11.4 In a worst case scenario, there is uncertainty in the employment land supply in Wyre (as discussed in paragraph 10.60). A worst case scenario is also put forward, assuming that sites WY4, WY5, WY7 and WY8 are ultimately lost to non E(g)/B-Class uses – up to 27.40 ha in seven sites. This still assumes some supply at WY1 Fleetwood Dock and Marina, Fleetwood and WY2 Hillhouse Technology Enterprise Zone, Thornton.

11.5 Reflecting the above issues, Tables 108 to 110 provide recommendations on the realistically available employment sites in the Fylde Coast, including providing evidence of the deliverability of those sites, where relevant.

Table 108 - Employment Land Recommendations – Blackpool

Site Ref. (Study Ref.)	Name	Realistic Land Supply, ha	Evidence of Deliverability/ Recommendations
BB1	Blackpool Business Park Expansion Plots	2.97	Part of the Blackpool Airport Enterprise Zone. Established growth location with multiple developments and infrastructure projects now completed/under construction, the focus for industrial and warehouse development in Blackpool, primarily to meet local business needs. Site comprises six plots, of which four have consents for primarily light industrial development and all of which have active plans for growth. It should continue to be protected for E(g)/B-Class uses in the next Local Plan.
BB2	Eastern Gateway	6.53	Marketed for a scheme of six B2/B8 Units of 1,394-6,968 sqm each, with a 5 year delivery timeframe. 21,367 sqm of total floorspace. Delivery is expected to be as design and build options or through a joint venture between Blackpool Council and a developer. Part of the Blackpool Airport Enterprise Zone and under Blackpool Council ownership, allowing the public sector to push forward development. In particular, the Eastern Gateway will be a key source of mid-sized and larger premises which are not being provided, in the short term at least, on other Fylde Coast employment sites, particularly in the core M55 Corridor area. It should continue to be protected for E(g)/B-Class uses in the next Local Plan.
BB4	Squires Gate Industrial Estate - Fox Brothers Transport and Recycling Yard	1.70	The site has a 1 year consent for commercial vehicle parking which expired in May 2024. It thus represents a medium term development opportunity, within Blackpool Airport Enterprise Zone, a focus for growth in Blackpool, and the Fylde Coast. Although there are no defined development plans here, at present, the site could link to the Eastern Gateway site to the south or to nearby Blackpool Business Park which has been a focus of local scale development in Blackpool. Its chances of being taken up, if offered for development, are thus very strong. It should continue to be protected for E(g)/B-Class uses in the next Local Plan.
BB6	Infill Plot off Chorley Road, South East of Westfield Caravans	0.30	Small, unconstrained plot, with road frontage. The site has been let on a long leasehold, but no development, or storage uses, have occurred here in some eight years so the land remains available for development. Blackpool Council is the ultimate freeholder of the land, allowing Blackpool Council to support and encourage the development of the site, subject to the aspirations of the leaseholder. Reflecting market demand, this small plot could either meet the needs of a single business or support a small scheme of light industrial units. It should continue to be protected for E(g)/B-Class uses in the next Local Plan.
BB7	Blackpool North Technology Park – Undeveloped land in the North	1.46	The southern portion of the site is under developer control, with some light industrial units delivered and plans, albeit subject to one refused consent, to deliver the remaining southern land for other light industrial/storage space. Other land in the south would be used for environmental mitigation. Another 0.88 ha of land remains available in the north of the site. This land could support further growth of the light industrial uses here with an access off Hawking Place, although masterplanning suggests that such an access would need to cut through land presently proposed for environmental mitigation. Before that 0.88 ha is allocated again in the next Local Plan, confirmation should be sought as to how it could be accessed and what the developable area would be net of land to be protected for environmental mitigation.
Total		12.96	

Source: BE Group, 2024

Table 109 – Employment Land Recommendations – Fylde

Site Ref. (Study Ref.)	Name	Realistic Land Supply, ha	Evidence of Deliverability/ Recommendations
FY1	Queensway Industrial Estate, Snowden Road, St. Annes	3.80	<p>Land in the process of being sold, with the new owner’s intentions not yet clear. However, the unconstrained land remains available as a logical extension to an established local industrial estate, in a gateway location into St Annes.</p> <p>The most likely uses would be light industrial, industrial and warehouse uses which are all in good demand. It should continue to be protected for E(g)/B-Class uses in the next Local Plan.</p>
FY2	Dock Road, Lytham	0.145	<p>Site presently in use for car parking. It remains available for development, in an established local industrial estate which has seen growth in recent years. It is most likely to be developed for the exclusive use of the landowner Helical, and adjoining business which has expanded previously. However, its position on Dock Road means that it could be sold to other parties for separate development. It should continue to be protected for E(g)/B-Class uses in the next Local Plan.</p>
FY3	Boundary Road, Lytham	0.49	<p>The site, extending west to include the Stanways Car Garage and units to the rear, now has consent for a foodstore and 0.49 ha of land in the north to be developed for 80 storage/employment units. The identified tenant for this latter scheme is Storage 24.</p> <p>The site has since been cleared and various discharge of conditions applications made so rapid implementation is assumed. Thus, while part of the supply at the time of writing, this land is likely to be taken up before the new Fylde Local Plan is adopted.</p>
FY4	Blackpool and Fylde Industrial Estate, Whitehills	2.40	<p>Full planning consent is now being sought for three industrial buildings consisting of eight units of between 219 sqm and 412 sqm each. The proposal would take up 1.37 ha in the west of the site, with the remaining land in the east held for phase 2-3 schemes. The application is submitted by Blackpool-based AC Electrical. Thus, the site has a clear forward plan for delivery. It should continue to be protected for E(g)/B-Class uses in the next Local Plan.</p>
FY5	Blackpool Airport Enterprise Zone, Squires Gate	14.50	<p>Proposed for a high tech business park, the Knowledge Quarter, comprising some 70,355 sqm of gross office/data centre floorspace. Development is dependent on financing, likely requiring public support, and identifying a development partner. Delivery is also dependent on the ability to viably relocate Airport Uses to the south (the Aviation Zone).</p> <p>Thus, there remain a number of questions to answer before deliverability can be confirmed. However, FY5 remains the key development opportunity in Blackpool Airport Enterprise Zone, a focus for market demand and recent development. The site is under public sector control, allowing them to push forward development, even if what is ultimately brought forward differs from what is planned. It should continue to be protected for E(g)/B-Class uses in the next Local Plan.</p>
FY6	DWP, Brunel Way, Whitehills	4.90	<p>Several hundred DWP staff presently occupy Peel Park. Over time they will relocate to the new office on King Street, Blackpool. At this time, it is not clear if the DWP will retain Peel Park or quit the lease. No further change is likely until the future of the wider site is clarified.</p> <p>Development here will depend on the future of the wider Peel Park site. Assuming the public sector did fully vacate the building then providing a new private sector occupier to accommodate this large facility would be extremely challenging. The alternatives would be sub-division of the properties for</p>

Site Ref. (Study Ref.)	Name	Realistic Land Supply, ha	Evidence of Deliverability/ Recommendations
			<p>multi-occupancy or a comprehensive redevelopment scheme, likely incorporating site FY6.</p> <p>Development here is thus likely to be a longer term prospect. However, with short term take-up likely on a number of nearby sites and demand focused in the Whitehills area, the prospect of development, for industrial and warehouse uses on this large, unconstrained site remains high. It should continue to be protected for E(g)/B-Class uses in the next Local Plan.</p>
FY7	Whitehills Business Park, Whitehills	2.87	<p>Whitehills has seen extensive development over the last decade. There remains good demand for industrial, trade and warehouse units of up to 929 sqm each from companies local to the Lytham, St Annes and Blackpool area. The site is owned by an experienced developer, who has successfully delivered a range of schemes here over the last decade, mostly for micro and small firms.</p> <p>There are four main undeveloped plots here, of which three are likely developed for industrial and warehouse uses (offices are constrained by viability). Development is on hold due to macroeconomic constraints such as high interest rates (which affect business and developer finance) and high construction costs (which affect development viability). However, these are anticipated to be short term issues, with a return to development on this key strategic site for the Fylde Coast likely from 2025 onwards. It should continue to be protected for E(g)/B-Class uses in the next Local Plan.</p>
FY9	Cropper Road East, Whitehills	3.30	<p>Land fronting Cropper Road now developed for housing. No identified development plans for the land to the east.</p> <p>Site sits in the backlands at present and is likely to be of limited interest to developers at present, compared to more prominent options in the Whitehills area. However, the development of adjoining sites, including FY4 Blackpool and Fylde Industrial Estate, Whitehills will open up this land while completion of the remaining plots at Whitehills Business Park will encourage businesses and developers to look at options further from the main roads. A comprehensive masterplan will be needed for the site, particularly clarifying site access and links to existing employment areas. Subject to this, the site should continue to be protected for E(g)/B-Class uses in the next Local Plan.</p>
FY10	Whyndyke Garden Village, Preston New Road, Whitehills	20.0	<p>The site has Outline consent for 1400 residential dwellings, 20 ha of B2/B8 industry and warehousing (proposed for the south of the site) and a range of related services, infrastructure and open space.</p> <p>Agents for the site report that owners are in the process of negotiating a deal with a developer who will bring forward the site under the existing consent, i.e. 1,400 dwellings and 20ha of employment land, with the latter comprising:</p> <ul style="list-style-type: none"> • 40,000 sqm B2 • 80,000 sqm B8. <p>However, the developer is looking to extend the amount of light industrial and office use to create a more mixed use scheme. The developer is looking to submit a Reserved Matters consent by early 2024, for the full scheme, and then progress the development as soon as possible. Thus, prospects for the delivery of employment uses here, albeit possibly differing from what is presently consented, remain strong. It should continue to be protected for E(g)/B-Class uses in the next Local Plan.</p>

Site Ref. (Study Ref.)	Name	Realistic Land Supply, ha	Evidence of Deliverability/ Recommendations
FY11	Mill Farm Sports Village, Fleetwood Road, Wesham	4.20	Mixed use site, but with established interest for industrial and warehouse uses, as evidenced by the HDI HQ proposal, alongside retail and leisure uses. Four other plots remain available on the site for E(g)/B-Class employment although other uses are also possible here as evidenced by the interest for uses such as a church. The outstanding plots are mostly sub 0.7 ha in size and so would most likely support light industrial uses or solus businesses, reflecting market demand. The site is serviced and includes a range of hot food/leisure uses, while the landowner is actively progressing plans for further commercial development on plots with strong M55 access. It should continue to be protected for a relevant mix of uses, including E(g)/B-Class options, in the next Local Plan.
Total		56.605	

Source: BE Group, 2024

Table 110 – Employment Land Recommendations – Wyre

Site Ref. (Study Ref.)	Name	Realistic Land Supply, ha	Evidence of Deliverability/ Recommendations
Allocated Sites			
Wyre Peninsula			
WY1	Fleetwood Dock and Marina, Fleetwood	8.10	<p>Within the docks themselves, owner ABP expect that most future development will be for retail, leisure and hot food uses, supporting an expansion of the marina. At the Fylde Ice and Cold Storage Co. building, which is at least partially empty, a change of use on this site appears likely. Given landowner intentions and the viability constraints associated with recently delivering Neptune Court, no available employment land is assumed in the main docks area. The next Local Plan should recognise that future growth is likely to be for a mix of uses here.</p> <p>The remaining employment land within the allocation is thus limited to the 8.10 ha Land south of Windward Avenue site, which is proposed, subject to planning, for a 34,263 sqm B2 production facility for Lofthouse (Fisherman’s Friend) and is expected to be taken up in the short term. That land is most likely to be taken up for the exclusive use of Fisherman’s Friend but, should that company ultimately not need all the land, plots could be offered to other businesses. Whether ultimately taken up by Fisherman’s Friend or not this land remains in E(g)/B-Class employment use, and this should be recognised in the next Local Plan.</p>
WY2	Hillhouse Technology Enterprise Zone, Thornton	10.96	<p>A diverse range of projects are being progressed across the 22 plots. There is a clear focus on energy generation and related infrastructure, with several small generation facilities completed and a range of larger facilities in the pipeline. Good demand is also reported from local businesses in the aggregates, plastics recycling, and civil construction sectors, as evidenced by the critical mass of such companies already active on the site. Enterprise Zone representatives, and site managers, are in active discussions with a range of potential occupiers for land and property, while several large existing occupiers have expansion plans.</p> <p>Engagement with stakeholders has identified a supply of 10.96 ha, in five plots (E, H, J, I and L), presently available to meet E(g)/B-Class employment</p>

Site Ref. (Study Ref.)	Name	Realistic Land Supply, ha	Evidence of Deliverability/ Recommendations
			<p>needs. Plots G, M and V4 totalling 12.19 ha may also provide some E(g)/B-Class redevelopment options over the next Local Plan Period, but there is little certainty about the scale and nature of what might be brought forward here.</p> <p>It is recognised that this estimate of available employment land remains indicative. Development plans, across the 22 identified plots are changing regularly while some options, such as proposals for larger offices, could prove difficult to viably bring forward. Most development in the north of Hillhouse will be dependent on delivery of a new road access across the railway, which does not yet have a clear 'way forward' in terms of financing and development. Reflecting this uncertainty, it is recommended that the following actions be undertaken to support employment allocations in the next Local Plan:</p> <ul style="list-style-type: none"> • A clear delivery plan to be agreed by key stakeholders to develop the Enterprise Zone, identifying the preferred use for each plot and how that use can be achieved. Also, a plan for the delivery and financing of the required road infrastructure • Viability testing of relevant development proposals, possibly as part of the Borough-wide viability testing exercise • Subject to the above, identify a realistic local employment supply, to 2042, for inclusion of the Local Plan <p>Hillhouse should also be identified, in the Local Plan, as an active Employment Area in Wyre, meeting local and strategic needs, including for energy infrastructure.</p>
A6 Corridor			
WY3	Riverside Industrial Park Extension, Catterall	3.42	<p>Site remains of interest to adjacent business Collinson, subject to acquisition. Site would most likely meet the businesses own needs for growth land, which are large and urgent, but could be made available, at least in the short-medium term to support other business growth for industrial and warehouse uses. Again, Collinson would be expected to push forward and finance development. It should continue to be protected for E(g)/B-Class uses in the next Local Plan.</p>
WY4	South of Goose Lane, Catterall	1.00	<p>Small, unconstrained site with A6 frontage. The Site recently secured consent for a mixed light industrial/warehouse scheme of smaller units. This reflects the good demand for smaller industrial and storage space across the Fylde Coast. 2,714 sqm is consented.</p> <p>This remains the identified use for the site at the time of writing. In practice the site owner is seeking a revised scheme which, if consented, would include hot food uses which would therefore reduce the net area of land and premises in E(g)/B-Class employment use. An allocation here thus needs to reflect the final agreed mix of uses. It is also likely that this site will be developed before adoption of the next Wyre Local Plan.</p>
WY5	Land West of the A6, Garstang	4.68	<p>Site is subject to two alternative schemes for mixed use development, both comprising up to 270 dwellings, 4.68 ha of Employment land (some 5,740 sqm E(g) and B8) in the north east, but with differing access arrangements.</p> <p>Stakeholders report that housebuilders Story Homes and Jones Homes are strongly interested in progressing the housing element of the scheme in the short term, subject to planning, which will open up the wider site to development, including the employment element. Development will also address site constraints.</p> <p>These housebuilders will not deliver the employment element, although this plot remains available for future development. The employment site has been marketed for several years without attracting viable interest, although businesses and developers are unlikely to commit to the location until access</p>

Site Ref. (Study Ref.)	Name	Realistic Land Supply, ha	Evidence of Deliverability/ Recommendations
			is agreed and ideally delivered. The site should be identified as an allocation. Reflecting uncertainty, if the site is subsequently proposed to be lost to an alternative use, it is recommended that a full marketing exercise of this employment site should be required once the necessary infrastructure is provided for the site, to confirm market interest in the location.
Rural Area			
WY7	Land West of Great Eccleston	1.00	<p>Land north of Copp Lane has Outline consent for up to 350 dwellings together with 1ha of employment uses in the north west, partly fronting and accessed from the A586 Garstang Road, along with services, infrastructure and open space.</p> <p>Avant and Bellway Homes will now deliver the housing, opening up the employment site for development. As with WY5 (and WY8) it will be difficult to measure market demand before the surrounding development has opened up the site for development. The site should be identified as an allocation. Reflecting uncertainty, if the site is subsequently proposed to be lost to an alternative use, it is recommended that a full marketing exercise of this employment site should be required once the necessary infrastructure is provided for the site to confirm market interest in the location.</p>
WY8	Forton Extension, Forton	1.00	<p>Land to the east of Forton, north and south of School Lane, owned by Persimmon Homes and to be developed under the Charles Church brand, the site has outline consent for 195 homes (later 184 homes through reserved matters), 1ha of E(g), B2, B8 employment land in the south east, fronting the A6 Preston-Lancaster Road, plus services. The housing is now under development.</p> <p>Persimmon indicated that it will deliver the housing, put in infrastructure for the employment site and market the land to developers/businesses, who would separately develop the site. The employment site has been marketed for several years without attracting viable interest. However, as with WY5 and WY7, it will be difficult to measure market demand before the surrounding development has opened up the site for development. The site should be identified as an allocation. Reflecting uncertainty, if the site is subsequently proposed to be lost to an alternative use, it is recommended that a full marketing exercise of this employment site should be required once the necessary infrastructure is provided for the site to confirm market interest in the location.</p>
Land in Existing Employment Areas with Unimplemented Consents			
WY9	Former LCC Depot, Green Lane West, Garstang	0.50	<p>Site has full consent for redevelopment of the existing depot to develop eight B2 industrial units of 106-167 sqm each or 1,474 sqm in total (843 sqm net of buildings to be cleared). Separately, the north of the site has consent for two units, one of 426 sqm and one of 153 sqm. The larger unit is proposed for the expansion of the applicant's business, Pugh's Piglets, the smaller one to be rented out by the applicant.</p> <p>Despite some delays in progressing development, with two consents on the site, some development of smaller industrial units on this land in an established local industrial estate, with good A6 access, remains likely. The site is thus considered part of the local employment land supply. A formal allocation in the Local Plan is not needed, however, for this small scale planning consent in an existing employment area.</p>
WY10	Land At Copse Road, Fleetwood	2.11	<p>The site has full planning consent for six commercial units comprising one unit of 2,323 sqm for a B2 use, three units consisting of 930 sqm of floorspace and two units consisting of 697 sqm floorspace all proposed with flexible of E(g), B2 and B8 uses. The six properties could provide up to 13 terraced units.</p>

Site Ref. (Study Ref.)	Name	Realistic Land Supply, ha	Evidence of Deliverability/ Recommendations
			<p>The scheme is presently being marketed, off plan, with the units to let, as suitable for warehouse, workshop, trade counter, showroom and office use, subject to relevant planning consents.</p> <p>Thus, there remains good interest in delivering an industrial and warehouse scheme here, by a developer with the capacity to deliver, even if what is ultimately brought forward differs from what is presently consented. The site is thus considered part of the local employment land supply. A formal allocation in the Local Plan is not needed, however, for this small scale planning consent in an existing employment area.</p>
WY11	VMS Solutions, Butts Close, Thornton Cleveleys	0.06	<p>The site has full consent for a B8 industrial building of 582 sqm for the storage of goods (vitamin tablets) ancillary to tenant VMS Solutions. The property is intended for the use of an existing business but has an independent access onto Butts Close so could be offered to other parties. Even if not brought forward for the present consent, the site remains an available infill plot in an established local industrial estate. The site is thus considered part of the local employment land supply. A formal allocation in the Local Plan is not needed, however, for this small scale planning consent in an existing employment area.</p>
Other Land with Unimplemented Consents			
WY12	Land East of Brockholes Industrial Estate, Brockholes Way, Cloughton-On-Brock	2.25	<p>Full planning consent for an extension to the existing Brockholes Industrial Estate comprising 6,039 sqm of new industrial and warehouse floorspace, comprising 15 units of 77-777 sqm. In 2022, the land came under the control of a developer partner making delivery more likely on an unconstrained expansion site adjacent to an established local industrial estate along the A6. The site is thus considered part of the local employment land supply. This larger employment proposal should be allocated in the Local Plan. Local Plan mapping will need to recognise this allocation by extending the existing industrial estate boundary.</p>
Total		35.08	

Source: BE Group, 2024

- 11.6 Overall, however it is **recommended that the three Councils seek to protect their employment land supplies from loss to alternative, non-E(g)/B2/B8, uses.**
- 11.7 The sites safeguarded for E(g), B2, B8 uses in the Wyre Local Plan (2011-2031) (2023) – WY14: Port of Fleetwood, Fleetwood and WY15: Brockholes Industrial Estate Extension, Catterall – are heavily constrained, with no clear plans for delivery and significant issues with development viability, for E(g)/B-Class uses at least. **It is therefore recommended that they not be allocated for E(g), B2, B8 in the next Wyre Local Plan.**

Recommendation 2 – Defining the Objectively Assessed Need

- 11.8 OAN has been calculated based on three models – Policy Off Labour Demand, Policy On Labour Demand (for Fylde Borough only), both with and without a deduction for the impacts of homeworking, and a forward projection of Past Take Up.
- 11.9 In terms of the preferred OAN for offices, the Policy Off Labour Demand model is chosen (Policy On Labour Demand for Fylde). This reflects the fact that:
- Unlike industrial/warehouse uses, the quantum of office space required by businesses is strongly driven by the number of staff they have to accommodate, so a forecast based on jobs change is most likely to be relevant here
 - As the majority of projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward.
- 11.10 Discussions with stakeholders suggest that some two years after the end of the Covid-19 Pandemic and associated Lockdowns, homeworking and hybrid working practices are here to stay with impacts on the quantum of space businesses need. While it is not possible to say exactly how working practices will evolve to 2042, Labour Demand models with an allowance for homeworking are more realistic at this time.
- 11.11 Requirements for industrial and warehouse premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Improvements in productivity and increasing automation in manufacturing are also changing jobs densities and reducing the link between numbers employed and land and property needs. This makes jobs-based, Labour Demand, modelling less relevant. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector, across the Fylde Coast, which is at odds with identified market demand and the almost exclusively industrial pipeline of development identified on local employment sites.
- 11.12 Here, therefore, the Past Take Up model is preferred as it is independent of jobs change projections and based on real world trends. It accounts for periods of growth and recession in the local economy since 2000, 2012 for Blackpool as discussed in Paragraphs 8.49-8.51, allowing that such economic growth and decline will continue to 2042. It is thus likely to be better in tune with real market demand than the Labour Demand model.

11.13 It is therefore recommended for office based sectors, that Blackpool, Fylde and Wyre Councils use the Labour Demand model (Model One/Two) as the main measure of future land need for the period 2022-2042. This indicates needs of 15.09 ha in total, including a 3 year buffer. By local authority area:

- Blackpool – 2.96 ha
- Fylde – 9.59 ha. Here the Policy On forecast is recommended as providing the most complete picture of employment change in the Borough, and particularly accounting for the Knowledge Quarter, Blackpool Airport Enterprise Zone, the largest office development likely on the Fylde Coast to 2042
- Wyre – 2.54 ha.

11.14 In terms of industrial and warehouse needs, it is recommended that Blackpool, Fylde and Wyre Councils use the roll forward of Past Take Up (Model Three), with an adjustment for relevant loses, and a 3 year buffer. This indicates needs of 53.81ha in total. By local authority area:

- Blackpool – 13.11 ha
- Fylde – 19.09 ha
- Wyre – 21.61 ha.

11.15 How this OAN can be met is considered in the recommendations below.

Recommendation 3 – Meeting Needs – Blackpool

11.16 As is noted, against an OAN of 16.07 ha, Blackpool has a supply shortfall of 3.11 ha, which primarily comprises the office component of the need. To meet this E(g)(i) requirement it is recommended that:

- Through the new local plan process the opportunity for accommodating the need identified for new office floorspace in the Town Centre, particularly in association with the Central Business District (Talbot gateway) should be explored through engagement with developers and landowners to determine what barriers might exist to development, especially in terms of viability, and what capacity exists in public sector support to address those barriers.
- Local Plan policy proactively encourage and focus office development into Blackpool Town Centre, particularly refurbishments to E(g)(i) office uses which are more likely to be viable than new build development.
- Assuming the Knowledge Quarter proposals proceed at Fylde employment site FY5: Blackpool Airport Enterprise Zone, Squires Gate, as envisaged,

Blackpool Council should engage with Fylde Council to explore the opportunity for this site to collectively accommodate the sub-regional office need of the two local authorities, in terms of its employment land outputs. This recommendation reflects the fact that development would occur on the boundary of Blackpool Borough and that Fylde has some surplus in its employment land supply.

11.17 Although Blackpool has approximately enough industrial land to meet its needs, to 2042, **it is recommended that Blackpool Council carefully monitor employment land take up to determine if a supply shortfall is likely later in the Plan period and thus inform when future reviews of the Local Plan should take place.**

Recommendation 4 – Meeting Needs – Fylde

11.18 With a supply surplus of 27.93 ha against the OAN, there is no need for further employment land allocations in Fylde Borough. This includes sites specifically to meet office needs. In terms of meeting office requirements, as with Blackpool, there is a need to encourage development/refurbishment in the main settlements and accordingly **it is recommended that Local Plan policy proactively encourage and focus office development into the town centres of the Borough, particularly refurbishments to E(g)(i) office uses which are more likely to be viable than new build development. Where possible, regeneration policy and practice should support and encourage this goal.**

11.19 In terms of industrial and warehouse land, again Fylde has sufficient land to meet its needs, including a strong supply of land in the core M55 Corridor area. It is, however, recommended that the next Fylde Local Plan, **continue to protect the full existing employment land supply of 56.61 ha, for E(g), B2, B8 uses, in order to:**

- **Allow the various development proposals, put forward on sites to progress.**
- **Provide flexibility in the supply and choice for businesses and allow Fylde to compete for inward investment.**
- **Provide larger sites to allow the development of mid-sized/larger industrial/warehouse units currently missing from the market.**
- **Provide flexibility to support an agreed portion of Blackpool's growth without the need for further employment land allocations.**
- **Allow for the fact that development at Lancashire (BAE Warton) Enterprise Zone has not occurred to date and that development here, in the future, may**

continue to be constrained by BAE's own needs and site security considerations.

Recommendation 5 – Meeting Needs – Wyre

11.20 As with Fylde, Wyre has a supply surplus, of 10.93 ha in this case, against its OAN, indicating that there is no need for further employment land allocations in Wyre Borough. This includes sites specifically to meet office needs. In terms of meeting office requirements, as with Blackpool and Fylde, there is a need to encourage development/refurbishment in the main settlements and accordingly **it is recommended that Local Plan policy proactively encourage and focus office development into the town centres of the Borough, particularly refurbishments to E(g)(i) office uses which are more likely to be viable than new build development. Where possible, regeneration policy and practice should support and encourage this goal.**

11.21 However, as set out in Section 10.0, there are uncertainties around the deliverability, for E(g)/B-class uses at least, of a proportion of Wyre's employment land supply while the core market areas of the Wyre Peninsula and A6 Corridor could find themselves heavily dependent on single sites to meet their needs to 2042. Wyre has a surplus supply with a range of +3.25-10.93 ha depending on the best and worst case scenarios (+3.25 being the surplus with the worst case scenario discussed in paragraph 10.60). However regardless of this surplus supply, **it is recommended that the new Wyre Local Plan considers allocating or safeguarding additional land as a minimum, focused in the Wyre Peninsula and A6 Corridor areas, for E(g), B2, B8 uses. This land would be made available for development if the available supply drops below OAN levels over the Local Plan period.** Section 9.0 of this Study has identified some options for safeguarding or allocating in the A6 Corridor but there remains an absence of deliverable sites on the Wyre Peninsula.

Recommendation 6 – Meeting Needs – Supporting Development in the Enterprise Zones

11.22 In terms of the three Enterprise Zones, the following recommendations can be made:

- Blackpool Airport Enterprise Zone, Blackpool/Fylde – Development proposals are progressing on the main sites which fall into Blackpool Borough - BB1: Blackpool Business Park Expansion Plots and BB2: Eastern Gateway. Thus, the main questions relate to the deliverability of the Knowledge and Aviation Quarter proposals on site FY5: Blackpool Airport Enterprise Zone, Squires Gate in Fylde. Given the importance of this location in supporting office sector growth on the Fylde

Coast it is recommended that Blackpool and Fylde Councils, plus the Airport and other partners, work to produce a delivery strategy to understand how these projects might be delivered, by whom, and to what timeframe. Also, that financial appraisals be undertaken to understand the viability of the schemes, what viability gap might exist and what funds, design changes, etc. may be needed to fill that gap. Finally, clarification is needed on what further land may need to be removed from Green Belt, to secure the full development.

- Lancashire (BAE Warton) Enterprise Zone, Fylde – As the Samlesbury portion of the Enterprise Zone reaches capacity, the emphasis of development is likely to move to Warton which also now benefits from improved access to the M55 via the new Junction 2. BAE Systems, and partners, are now producing a new masterplan for the site and **it is recommended that Fylde Borough Council engage with this masterplanning process to clarify the scale and nature of the strategic employment land supply which could be made available, the access and other infrastructure requirements of the development land and who, with what funding, will be responsible for opening up the site for development and marketing the location. Also, Fylde Borough Council should seek clarification on what land will be required for BAE Systems, and its suppliers, and what land could be made available to a broader range of relevant businesses.**
- Hillhouse Enterprise Zone, Wyre – Hillhouse is subject to a diverse range of development plans, including various energy generation, and associated storage, projects. The new masterplan, currently under development, should clarify the amount of development land available here to meet local and strategic E(g), B2, B8 needs. **It is also recommended that masterplanning work with key partners including delivery planning for the road infrastructure required to fully open up the site identifying the timetable for delivery, who has responsibility for development and supported by what funding sources. Financial appraisals could usefully consider the viability of key schemes, with infrastructure costs allowed for and, if a viability gap exists, how that could be addressed.** This would provide greater certainty as to the full deliverability of the Enterprise Zone land.

Recommendation 7 – Meeting Needs – Land Recycling, Infill Developments and Large Employer Growth

- 11.23 Blackpool, Fylde and Wyre have seen business accommodation delivered through the re-use of small sites be it through the refurbishment and sub-division of buildings, redevelopment or infill development. Related to this, larger employers on the Fylde Coast have been proactive in seeking out growth land onto which they can expand, either immediately or over an identified timeframe.
- 11.24 Accordingly, it is recommended that **Local Plan Policy, in Blackpool, Fylde and Wyre, is supportive of such E(g)/B2/B8 developments, re-uses, etc., typically on smaller or medium-sized sites, which will provide either local business properties or options for larger business growth. Such sites will need to be appropriate to their location in terms of:**
- **Access and traffic generation**
 - **Scale and intensity of use**
 - **Links to existing Employment Locations**
 - **Impacts on neighbouring uses**
 - **Sustainable development principles.**
- 11.25 **This relates to Recommendation 9 below which highlights the importance of protecting existing Employment Areas which will be the focus of local business growth, particularly in Blackpool which has limited options elsewhere.**
- 11.26 **Small site schemes which link to areas of high housing growth should be particularly encouraged to link homes and employment opportunities, minimising the need to travel and retaining labour within the local authority areas.**
- 11.27 **While it may be possible to identify opportunity sites it is broadly recommended that a flexible approach be taken allowing the market to determine where and when opportunities are brought forward, subject to the points above and other planning considerations.**

Recommendation 8 – Meeting Needs – Encouraging Rural Diversification

- 11.28 Fylde and Wyre have a diverse range of well occupied rural E(g)/B2/B8 employment schemes, which meet a high proportion of the district's business needs. Both areas have also seen a range of conversions of agricultural buildings to industrial and particularly

B8 storage uses. In Wyre in particular, such rural conversions are likely to meet a lot of local needs outside of the main settlements and Employment Areas.

11.29 Agricultural diversification will be a key source of such premises, but it is about more than the reuse of farm buildings. Solus rural commercial properties will also provide opportunities for reuse or redevelopment to meet rural needs for B-Class premises or other uses appropriate to this location and subject to Local Plan Policies.

11.30 **A broader rural diversification policy is therefore recommended in the Local Plans of Fylde and Wyre which indicates support for E(g)/B2/B8 developments which are appropriate to their location in terms of:**

- **Access and traffic generation**
- **Scale and intensity of use**
- **Local landscape quality and environmental/ecological issues**
- **Impacts on neighbouring uses**
- **Signage requirements (both directional signage on surrounding roads and onsite signage)**
- **Sustainable development principles.**

11.31 Reuse of existing premises is always desirable but new development may also be needed to address all requirements and, subject to the above, and other planning considerations, should not be discouraged.

11.32 Policy should also encourage development for a mix of E(g)/B-Class uses, i.e., not purely for office or industrial uses and, where possible, for a mix of tenures and price ranges. Rural businesses will need a diverse mix of premises, but experience suggests that rural schemes can concentrate too much on either high-end accommodation or very low-grade industrial space. While policy cannot enforce how much developers charge for space it can encourage a greater diversity of provision.

OTHER RECOMMENDATIONS

Recommendation 9 – Existing Employment Areas to be Retained

- 11.33 86 Employment Areas – 13 in Blackpool, 39 in Fylde and 34 in Wyre – have been assessed and graded. Five areas, four in Fylde, one in Wyre, were identified as not being primarily occupied by E(g)/B-Class uses and are not recommended for protection for such uses in emerging Local Plans. One area in Wyre fell within another employment area so was also excluded.
- 11.34 Of the 80 remaining Employment Areas, all but four are well occupied, of at least moderate physical quality and able to continue meeting business needs over the long term. **It is recommended that these 76 locations continue to receive protection under the new Local Plans. Local Plan policies will need to reflect the new ‘E’ Use Class and the changes now permissible within it, i.e. accept that it is not possible to prohibit changes within the E Use Class. However, it is still possible to protect against the loss of larger B2/B8 premises, which are a key part of the local economies, and not being delivered by private sector developers, and to regulate physical redevelopment proposals.** The four exceptions to this recommendation are Warbeck Hill and Preston New Road (NS&I) in Blackpool as well as Freckleton Boatyard and Carr Farm, Lodge Lane, Warton in Fylde, which received a low grading of D/E in the Employment Areas Assessment in Section 7.0. These are discussed further at Paragraph 11.40 below.
- 11.35 **More detailed policies could identify the following distinctions within those Employment Areas:**
- A-B Graded Employment Areas**
- 11.36 The Employment Areas Assessment (Section 7.0) grades three Employment Areas in Blackpool and eight in Fylde (none in Wyre) A-B. **It is recommended that these A-B graded areas receive strong protection against further losses to non E(g)/B-Class uses.**
- 11.37 These locations contain the majority of Blackpool and Fylde’s major private sector employers and their most modern accommodation. They have a particular role in meeting strategic needs and attracting inward investment. Losses should only be allowed if an applicant can demonstrate exceptional circumstances and that the proposals will not have a significant adverse impact on surrounding local uses. Such development should however not prejudice the efficient and effective uses of the

remainder of the employment site. Proposals to upgrade facilities and improve the quality of the stock should be supported to ensure the need for B2/B8 use space is met.

- 11.38 Changes of use from the E(g) Use Classes to other E Use Classes, are now permissible without a Change of Use Consent, on these existing employment areas and elsewhere. Thus, such change cannot be regulated in the planning system. However, changes of use within the E Use Classes will not necessarily prevent such existing employment areas from continuing to meet local business needs. Trade, relevant retail, and service uses can have a strong role in occupying older industrial/mill premises which are no longer attractive to higher value manufacturing or logistics businesses. Modern industrial estates increasingly accommodate uses such as gyms, nurseries, places of worship and arts facilities, which provide services both to local workers and adjoining communities. The high occupancy rates and good demand for premises also make larger scale losses of E(g) class premises less likely, at least in these prime Employment Areas.

C-E Graded Employment Areas

- 11.39 Eight Employment Areas were graded 'C' in Blackpool, 25 were graded C or D in Fylde and 32 were graded C or D in Wyre. These locations contain the bulk of the local supply of E(g)/B-Class premises. All continue to be active and well used industrial estates/business parks and particularly have a role in providing affordable premises to new and micro businesses. **It is recommended that they be protected in the Local Plans, as above.**
- 11.40 Four locations received an 'E' or 'D/E' grading. The first, Warbeck Hill in Blackpool which is vacant and unlikely to be reoccupied by private sector E(g)/B-Class businesses. Preston New Road (NS&I), in Blackpool, is occupied at present but may become vacant in the long term and, if it does, will face similar issues to Warbeck Hill. The others, Freckleton Boatyard and Carr Farm, Lodge Lane, Warton, both in Fylde, do accommodate 1-2 businesses, but occupying low grade stock in a very peripheral location. **None of these locations should be protected in the respective Local Plans for E(g)/B-Class Uses.**

Recommendation 10 – Skills Development

- 11.41 This report has highlighted the main growth sectors and indeed the forecasted growth in employment to 2042. Increasingly these sectors require access to staff with higher technical and cognitive skills. The role these skills play in increasing wealth (turnover), productivity (GVA) and employment growth should not be underestimated.

11.42 In discussions, businesses report various shortages of skilled staff in a range of specialist sectors. These have been discussed in Section 5.0 with reference to the Lancashire Local Skills Improvement Plan (2022), and particularly include shortages in Manufacturing and Engineering sectors, Construction, Transport and Distribution, IT and Digital, which will have relevance to industrial, warehouse and offices uses. These shortages will have some impacts on business growth although most of the larger employers consulted for this are seeking expansion regardless of constraints on staffing. Additionally, most of the shortages highlighted are not specific to the Fylde Coast, but county and, in many cases, nationwide.

11.43 To help address this issue it is **recommended that the three Councils continue to work through relevant public skills bodies, to support improvement in sub-regional skills provision, particularly in engineering and technical sectors. Specific activities in this area could include:**

- **A local scale study on skills gaps in the Fylde Coast, building on the Lancashire Local Skills Improvement Plan (2022), identifying in more detail the key skills gaps for businesses and suggesting locally specific policies and programmes to address those gaps**
- **Support of local and LEP level programmes for skills development**
- **Support to businesses in their efforts to up-skill their staff, through providing information on pathways, funding and support for staff development**
- **Promote further in-depth collaboration with the suite of Further and Higher Education institutions in the wider area which, as noted, have their own programmes to address skills issues**
- **Promote understanding among businesses and students of apprenticeship and ongoing learning programmes available**
- **Promote to current high school students the breadth of engineering and technical opportunities as a career in the Fylde Coast, including a programme of events to highlight the opportunities.**
- **A particular focus, for such programmes could be key office and ICT careers, given the forecast growth in such sectors to 2042.**

Recommendation 11 – Benefiting from the Green Economy

11.44 As has been discussed, combating climate change could boost local economic growth in construction, renewable energy generation, advanced manufacturing and a number of associated IT and consultancy sectors. Capturing a share of this growth locally will require investment in a high quality property offer at strategic locations on the Fylde Coast, specifically:

- **Hillhouse Enterprise Zone, Wyre – Hillhouse is emerging as a centre for low carbon energy generation, storage and related infrastructure. Such infrastructure could specifically be identified as an acceptable use here, in Local Plan Policy.**
- **Blackpool Airport Enterprise Zone, Blackpool/Fylde and BAE Warton Enterprise Zone (Lancashire Enterprise Zone), Fylde – Low carbon industries and low carbon energy generation should also be encouraged and supported, through relevant planning policy. The provision of high quality industrial units, capable of accommodating the advanced manufacturing elements of the Green Economy should be encouraged on sites like BB2: Eastern Gateway**
- **Capturing the IT and consultancy elements of the Green Economy will require the provision of good quality, flexible office space. In this regard the Knowledge Quarter scheme at Blackpool Airport Enterprise Zone will be key and partners should work to ensure this proposal is realised, particularly as it is likely to require public sector leadership and financial support to deliver. It must also be recognised though that there will be limits on the scale and quality of office space which can be delivered here, given the high costs of building Grade A offices against the levels of rent which can be achieved on the Fylde Coast**
- **Westinghouse, Springfield, Fylde – An established major employer and facility for low carbon growth. Plans for growth and expansion of operations here, within the Employment Area boundary, or the growth of supply chain companies looking to locate to/grow within Springfield, should be encouraged.**

Recommendation 12 - Monitoring Arrangements

11.45 There are minor changes that would improve the quality of monitoring data and aid future updating of employment land provision. To achieve this BE Group recommends:

- **All frontline personnel involved in logging received planning applications be made aware of the importance of the information entered, in terms of the contribution to the evidence base.**

- **The need to take account of variables such as windfall sites and particularly sites or premises lost to alternative uses.**
- **The use of GIS monitoring to calculate land take-up related to planning applications, rather than reliance on application content.**
- **Monitor, and report on, losses of E(g)/B-Class land and premises to other uses, with a focus on losses involving structural changes to property rather than just changes of business occupier.**
- **Monitoring should identify changes both inside and outside of defined employment areas.**
- **It is useful to monitor changes within the employment use classes, to understand how local property stock and business needs are changing. However, it should be recognised that changes within the E(g)/B-Class uses do not result in a net gain or loss of employment land.**
- **It is also useful to monitor changes to, or developments for, trade uses which are a growing component of industrial estates.**
- **Look to record changes under Permitted Development Rights, where possible.**
- **It is useful to monitor Changes of Use of Agricultural Buildings to B8 Storage to provide a full picture of economic change locally.**
- **Recording details of applicants/agents to assist in future monitoring of site status**
- **Recording numbers of proposed jobs, which would provide an alternative, local level job densities yardstick to the national statistics**
- **Monitor car parking rates in planning consents, to better inform future policy.**

Recommendation 13 – Future Reviews

11.46 This report has shown how market conditions in the Fylde Coast have changed in the approx. decade since the completion of the last full Employment Land Review, particularly over the last few years due to the effects of the Covid-19 Pandemic. In 2023/2024 there remains economic uncertainty over the long-term impacts of inflation, supply shortages and the risks of national recession, all factors which may impact on the demand for employment land and premises.

11.47 In view of these factors, **it is recommended that the three Councils review their employment land portfolio at intervals of around five years.** This is also in accordance with the NPPF which recommends Local Plan, and evidence base, reviews at least once every five years.

Recommendation 14 – Maintain Awareness of External Influences

11.48 As a first point, Blackpool, Fylde and Wyre Councils must recognise their role, together with its neighbours, in developing the economy of its FEMA. In this respect, they are interconnected, to varying degrees, on a number of levels.

11.49 Key overlapping issues, in the FEMA, which will need further consideration and monitoring include:

- *Preston* – Access between the Fylde Coast and Preston now benefits from the newly opened Junction 2 M55 and associated link road to the A583. Employment allocations in this area are possible, but at the time of writing none has been confirmed and North West Preston remains a primarily residential area. Further engagement with Preston City Council is recommended to understand the scale and nature of proposed allocations here which may compete with equivalent locations on the Fylde Coast
- *South Ribble* – The large scale provision of offices at the Cuerden Strategic Site or Lancashire Central, would impact on market demand on the Fylde Coast, but given viability constraints on office development, it remains unclear if this floorspace will actually be delivered. The Samlesbury Enterprise Zone has been the focus for development activity in the wider Lancashire Enterprise Zone, which also includes BAE Warton, delivering a range of skills development facilities which will benefit Fylde. With the completion of the campus for the National Cyber Force, which will draw labour from the Fylde Coast, the Samlesbury portion of the Enterprise Zone will be largely full, providing opportunities for BAE Warton.
- *Lancaster* – Bailrigg Garden Village, which would have delivered up to 8 ha of high quality employment land in the A6 Corridor, close to the boundary with Wyre is now subject to a full review of the Lancaster Local Plan which may restructure how Lancaster’s housing and employment land needs will be met. Employment land allocations at Heysham Port, which competes with Fleetwood, are similarly subject to this review.

11.50 **Accordingly, a high level of joint working between these authorities, Blackpool, Fylde and Wyre Councils is recommended.**