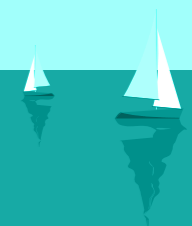
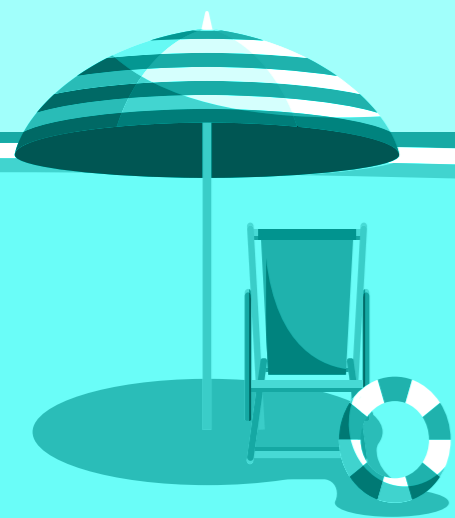


ST-ANNE'S-ON-THE-SEA

TOWN CENTRE MASTERPLAN: STAGE 1
BASELINE SUMMARY



BDP
SEPTEMBER 2022

1 INTRODUCTION

This report ties together the suite of baseline reports prepared as part of Fylde Council's (FC) Town Centre Strategy and Masterplan Commission, led by a BDP team. Five reports make up the baseline research activities which underpin the overall masterplan, including:

1. Planning, Design and Movement
2. Fylde Healthcheck and Centres Study
3. Property Market Review
4. Visitor Economy
5. Socio-economic context

This report provides a short summary and introduction to each baseline report for the purposes of organisation and clear navigation around the reports.



2 REPORT SUMMARIES

A short summary and introduction to each report shall follow.

2.1 Planning, Design and Movement

The Planning, Design and Movement report was prepared by BDP and Vectos Transport Consultants. The report provided an assessment of the context of St Anne's from a planning, urban design, and transport perspective. The report presented an appraisal of St Anne's character, historical development, relevant policy designations, and transport accessibility. The report was informed by site visits, data and document reviews, desktop research and consultations with key stakeholders including the FC steering group and local business owners.

2.2 Fylde Healthcheck and Centres Study

The Fylde Healthcheck and Centres Study was prepared by Nexus Planning as part of the BDP team. Nexus's role was to undertake a Fylde Healthcheck and Centres Study in order to provide baseline evidence to inform the masterplan, and to ensure that future retail and leisure needs are met in a suitable manner within St Anne's and across the wider Fylde area. The principal purpose of this study was to establish the current position in respect of the need for additional retail and other main town centre use facilities in Fylde, and to consider the vitality and viability of the key town centres at Lytham, Kirkham and St Anne's.

2.3 Property Market Review

The Property Market Review was prepared by Robert Pinkus & Co LLP Commercial Property Consultants as part of the BDP team. This report provided an assessment of the property market in St Anne's, including information of rents and yields, lease lengths, recent transactions and property trends, and a comparison to nearby centres. An assessment of commercial potential and interest is provided, informed through direct enquiries with named operators and companies, providing an understanding of the investment criteria and property requirements of such operators and companies.

2.4 Visitor Economy

The Visitor Economy report was prepared by Amion Consulting as part of the BDP team. The report provides a baseline assessment of the visitor economy, specifically looking at the historic volume and value of St. Anne's visitor economy and exploring potential development themes that could form part of the masterplan options in Stage 2 of the masterplan study. It also forms the baseline analysis for the Destination Management Plan which will be developed with stakeholders in Stage 3 of the work. This final stage of the work will include the findings from primary research that is being undertaken into visitor perceptions and behaviours.

2.5 Socio-economic Context

The Socio-economic Context report was prepared by Amion consulting as part of the BDP team. The report sets out an overview of key economic indicators to place the proposed masterplan interventions into context and provide an understanding of how they respond to the wider socio-economic conditions. The indicators included in the report have been grouped into the themes of People, Economy and Place. The theme, People, covers demographic analysis, health and life expectancy and education and skills. Economy refers to employment growth, business base, GVA, economic activity and unemployment. Finally, Place provides a summary of the property market, digital connectivity, deprivation, and crime.

3 SWOT ANALYSIS

A SWOT analysis is presented below, with a combination of points from the baseline reports.

STRENGTHS

- Existing adopted highway and public realm within St Annes can be readily adapted to improve the accessibility by walking and cycling.
- The topography and scale of St Annes lends itself to walking and cycling
- Train services expected to improve and bus services provide good connections to local areas.
- The Heyhouses Link will provide a new, direct vehicular route from the motorway into St. Annes
- St Anne's offers 'All day' beach
- Wider Fylde coast offer is currently complimentary – St Annes = Accommodation and Food, Lytham = Food and Shopping, Blackpool = Entertainment
- Upmarket and profitable accommodation offer, with a higher percentage of leisure visitors (less vulnerable than business tourism markets)
- Confidence amongst accommodation owners is high with investment plans either underway or in development
- High number of loyal staying visitors making high numbers of repeat visitors
- Evidence of strong recovery post covid
- New business opening e.g. boutique 'spa' in JR Taylor building
- Town Centre has fared relatively well during covid
- The Town is at least as well favoured by investors in comparison with most of its competing retail centres, with the exception of Lytham
- There is a healthy mix of multiple nationals and independent retailers
- ALDI store respectful of local architectural character
- Original Victorian character of Town Centre remains largely intact

WEAKNESSES

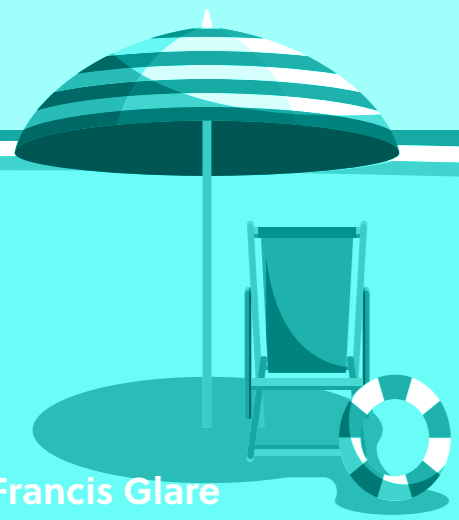
- The approach to the centre along Clifton Drive from each direction lacks any form of visual statement
- Poor pedestrian connection between the Island Site and the town centre
- Signage to key destinations for drivers including to available car parking is poor and does not provide real time information
- Parking– supply, location and '2 tier' management regime
- Street lighting is dark
- Multistorey car park is underused and the pedestrian routes to this lack safety and security
- Train station lacks facilities
- Pleasure Island is an unattractive building with no active frontages or public realm provision – only parking spaces
- Island site underutilises its proximity to and view of Ribble Estuary
- Pier is underused and in poor condition – the approach is dominated by cars that impact upon pedestrian safety and delay when crossing roads
- Lack of national/international branded accommodation
- Timing (and location) of events
- Promenade gardens lack interest thus are often ignored with people choosing to walk along the front or the road
- 'Value' operators in key locations (e.g. B&M)
- Poor catering/retail business survival rates
- Burlington Centre of lower quality than neighbouring buildings with poor active frontages
- Vacant units in prime locations (e.g. Prezzo and M&Co)
- The "sunny side" of The Square is distinctly more popular with retailers
- There is low activity in the office investment market
- Town Hall occupies key location, with substantial parking and little active interaction with street

OPPORTUNITIES

- There is significant interest in pedestrianisation of the town centre and the provision of space to hold events
- There is a desire for improved weather protection in the Centre, particularly The Square
- Wayfinding measures to improve pedestrian and cycle connectivity between the station, the town centre, the pier and island site
- Provision of additional active travel infrastructure, such as facilities for hiring a bicycle or e-bike
- Green routes linking together key assets e.g. Ashton Gardens and Promenade Gardens
- There is a requirement for hotels of higher quality
- Improved signage including real time information for drivers will reduce the amount of time taken to find an available parking space and will encourage drivers to use underutilised car parks.
- Signage of drivers to and from the Heyhouses Link could be utilised to reduce the volume of traffic passing along St Anne's Road West when accessing the seafront
- Removal of car parking along the seafront will encourage active travel and reduce the dominance of cars
- Demand for a modern indoor Leisure Centre offering up to date attractions, following the model of The Flower Bowl near Preston
- Potential for spa/wellness facilities
- Masterplan to propose more flexible use of town centre e.g. event spaces
- Opportunity to develop higher end leisure facilities to meet market profile
- The town centre is benefitting from a change in shopper habits (i.e., more people shopping locally)
- Strong independent retail offer

THREATS

- Increased traffic and air pollution on residential roads surrounding the town centre from diverted traffic.
- Increased traffic and congestion on St Anne's Road West or on Clifton Road North and the Promenade South due to Heyhouses Link road.
- Increased conflict between pedestrians and vehicles due to introduction of pedestrian priority.
- Residents and/or stakeholders objecting to the scheme and the re-allocation of road space.
- Residents and/or stakeholders objecting to the removal of parking along the seafront.
- Owners of Multistorey car parks not funding improvements to these car parks.
- Lack of new customers
- Funding not provided to upgrade the train services to/from St Anne's or the railway station.
- Complex tenancy structure on Island site inhibiting comprehensive/strategic development and business investment, although the principal tenant, Mitchells & Butlers, have indicated a willingness to consider restructuring.
- Traditional group market in decline (social groups and coach markets)
- Coastal defence works could be a physical barrier
- Weather-dependent events
- Major retail chains prefer Blackpool and Preston
- The town centre is not a major attraction for new offices and some premises are converting to residential use
- There is sustained interest from developers in building residential apartments in the town, led by occupational buyer demand
- Insensitive modern proposals to historic character buildings



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