

1. INTRODUCTION

1.1 GVA Grimley was instructed in August 2005 to undertake the Brighton & Hove Retail Study 2005 (Study Context Area: Plan 1). The purpose of this study is to provide an up-to-date picture of current and future capacity for retailing in Brighton & Hove, which will be used to accurately determine planning applications and to inform the emerging LDF. This study will also assess the existing network of larger and smaller centres in Brighton & Hove and the function and effectiveness of the current retail hierarchy.

1.2 Our terms of reference are to:

- Establish the extent to which the current retail provision in Brighton & Hove satisfies the level and nature of consumer demand within each catchment;
- Estimate the scale and nature of any changes in this position that may arise in the light of:
 - Potential increases in population;
 - Forecast changes in retail expenditure;
 - Changing forms of retail provision;
 - Possible increases or decreases in the trade draw from competing centres.
- Identify the scale and nature of additional retail provision that may be appropriate in Brighton & Hove to the period 2016, incorporating interim years of 2009 and 2011;
- Assess the scope for new retail development and the potential to accommodate this within Brighton & Hove.

1.3 In order to address the requirements of the brief, our methodology incorporates a comprehensive up to date review of retailing needs in Brighton & Hove. We have drawn on a specially commissioned household telephone survey to provide an up to date indication of shopping patterns, and to examine how the retail hierarchy functions relative to other centres within the wider sub-regional retail hierarchy. The telephone survey is discussed in more detail throughout the Retail Study. The household telephone survey area is illustrated on Plan 2.

1.4 Health checks have been undertaken in Brighton City Centre, Hove and London Road Town Centres, and the District Centres of Lewes Road, St James's Street, Brighton Marina and Boundary Road/Station Road. These draw on the performance indicators set out in paragraph 4.4 of PPS6 and annual town centre health checks undertaken by Brighton & Hove City Council. These reviews inform the retail need assessment, highlighting the extent of deficiencies in the range, choice and distribution of existing provision throughout Brighton & Hove.

- 10.1 Our quantitative capacity forecasts draw on the household telephone survey to identify Brighton & Hove's market share as the basis for examining the implications of forecast spending growth for shop floorspace capacity. The study considers the opportunities to accommodate further new retail development and an analysis of the likely effect of the retail elements of the forthcoming major projects. The results of the full analysis are drawn together to highlight our key conclusions to inform the forthcoming LDF.
- 10.2 The Telephone Survey area is illustrated on Plan 2. To ensure a sensible geographical boundary for the survey area we drew on the Regional Assessment commissioned by SEERA (2004), and GVA Grimley's specific localised knowledge from recent work in adjoining authorities (Mid Sussex District Council, Horsham District Council and Lewes District Council). We drew on up-to-date survey material for an extensive and consistent geographical area stretching from Brighton to East Grinstead/Crawley in the North, Hailsham in the east and Horsham/Billingshurst/Pulborough in the west.
- 10.3 The telephone survey boundary also took into consideration the local authority boundary in relation to the existing retail hierarchy, the adjoining catchment population/urban areas, out of centre retail provision and competing centres in the wider catchment. We drew on the in-centre shopping survey to analyse in-flows of trade into the survey area, including trade from Shoreham.

CONTEXT

- 1.5 Brighton & Hove last commissioned a Retail Study in 1999. The key findings at that time are summarised as follows:
- Failure to accommodate pressures for growth and change in central Brighton may lead to an increase in distances travelled for shopping purposes, increased car usage and a resultant decline in the centre's position in the retail hierarchy;
 - In Hove, the public realm and environment was identified for improvement, and the George Street site, including the Gas Works, was identified for development;
 - London Road was performing poorly against a number of PPG6 indicators including rents, yields, vacancy rates and pedestrian flows;
 - The quantitative capacity analysis indicated that there would be capacity for additional development over the Plan period in the town centre comparison sector and the retail warehouse sector, but not in the convenience sector.
- 1.6 The Study is now out of date, particularly in light of revised town centre policy guidance in the form of PPS6, and now requires an update.

STRUCTURE

- 1.7 The next section of this report sets out a review of national, strategic and local planning policies relevant to retail planning in Brighton & Hove. Section 3 highlights current retail trends, focusing on the likely implications for retailing within the Council's administrative boundary. In Section 4 we review the sub-regional context. This looks in particular at the influence of competing centres in the wider sub-region, and potential changes in influence in the future.
- 1.8 In Sections 5, 6, 7 and 8 we present our qualitative assessment of the health of the city, town and district centres. In Section 9 we set out our quantitative assessment, highlighting the performance of existing retail provision and the capacity for additional retail floorspace to the period 2016. Section 10 draws together the key implications of our sub-regional assessment, and quantitative and qualitative reviews, to identify the scope for new development and recommended strategy over the forthcoming LDF period.

2. POLICY FRAMEWORK

2.1 In this section, we examine the key points of relevance from national and regional planning policy guidance, and the adopted Brighton & Hove Local Plan.

DELIVERING SUSTAINABLE DEVELOPMENT

2.2 The Government is continuing to take forward a major programme of reform to the planning system to support its drive to create sustainable communities, promote sustainable development and achieve a better balance of housing supply and demand.

2.3 The Planning and Compulsory Purchase Act received Royal Assent on 13th May 2004. The Act sets a statutory objective for development plans to contribute to the achievement of sustainable development, placing sustainability objectives at the heart of the planning system.

2.4 Planning Policy Statement (PPS) 1; Delivering Sustainable Development, issued in February 2005, sets out the overarching planning policies on the delivery of sustainable development through the planning system. The guidance confirms that sustainable development is the core principle underpinning planning, clarifying that the concept is a simple idea of ensuring a better quality of life for everyone now and for future generations.

2.5 The Government makes clear that planning should facilitate and promote sustainable and inclusive patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community. In promoting sustainable development, the Government reaffirms through the guidance that, amongst other things, the planning system needs to:

- Recognise that economic development can deliver environmental and social benefits;
- Make suitable land available for development in line with economic, social and environmental objectives - ensuring that suitable locations are available for industrial, commercial, retail, public sector, tourism and leisure development, so that the economy can prosper;
- Promote urban and rural regeneration to improve the well being of communities, improve facilities, promote high quality and safe development and create new opportunities for the people living in those communities. Promote mixed use developments for locations that allow the creation of linkages between different uses and can thereby create more vibrant places;
- Provide improved access for all jobs, health, education, shops, leisure and community facilities, open space, sport and recreation, by ensuring that new development is located where everyone can access services or facilities on foot, bicycle or public transport rather than having to rely on access by car, while recognising that this may be more difficult in rural areas;

- Promote the more efficient use of land through higher density, mixed use development and the use of suitably located previously developed land and buildings. Bring vacant and underused previously developed land and buildings back into beneficial use to achieve the targets the Government has set for development on previously developed land.
- 2.6 PPS1 elevates the importance of design in the achievement of sustainable development. The document emphasises that good design ensures attractive, usable, durable and adaptable places and is a key element in achieving sustainable development, adding that 'good design is indivisible from good planning'. PPS1 highlights that good design goes beyond aesthetic considerations and must also address connections, integration and linkages, and ensure safe, successful and inclusive settlements while offering a full range of opportunities and facilities to society.
- 2.7 PPS1 highlights the importance of community involvement to planning and the achievement of sustainable development. One of the principles of sustainable development is to involve the community in developing the vision for its area through the concept of 'front loading', i.e. seeking early consensus. The Planning and Compulsory Purchase Act 2004 requires regional planning bodies and local planning authorities to prepare a Statement of Community Involvement, in which they set out their policy on involving their community in preparing regional spatial strategies, local development documents and on consulting on planning applications.
- 2.8 PPS1 widens the remit of local authorities who now have responsibility for reporting, on an annual basis, the extent to which policies set out in LDF's are being achieved. Keith Hill (then Planning Minister) commented that under the new planning system the ability to produce various local development documents, as opposed to one local plan document, allows authorities to respond quickly to new issues and changing priorities for sustainable development in their area. A Good Practice Guide sets out how the new local plan system should be monitored.
- 2.9 While PPS1 sets the key objectives for the planning system, the guidance does not replace or override other national policies and should be read in conjunction with other statements of national planning policy.

PPS6: PLANNING FOR TOWN CENTRES, MARCH 2005

- 2.10 PPS6 covers town centres and the main town centre uses. It states that the Government's key objective is to promote their vitality and viability by:
- Planning for the growth and development of existing centres; and
 - Promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all.

- 2.11 There are other Government objectives which need to be taken into account in the context of the above key objectives, and these are:
- Enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially excluded groups;
 - Supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and
 - Improving accessibility, ensuring that existing or new development is, or will be, accessible and well served by a choice of means of transport.
- 2.12 PPS6 also states that wider Government policy objectives are relevant, insofar as they would not be inconsistent with the key objectives highlighted above. These include promoting social inclusion; regeneration of deprived areas; promoting economic growth; sustainable patterns of development; transport choices; and high quality and inclusive design.
- 2.13 PPS6 states that local planning authorities should actively plan for growth and change in town centres over the period of their development plan documents by:
- Selecting appropriate existing centres to accommodate the identified need for growth by:
 - making better use of existing land and buildings, including where appropriate, redevelopment; and
 - where necessary, extending the centre.
 - Managing the role and function of existing centres by, for example, promoting and developing a specialist or new role and encouraging specific types of uses in some centres; and
 - Planning for new centres of an appropriate scale in areas of significant growth or where there are deficiencies in the existing network of centres.
- 2.14 Where possible the guidance states that growth should be accommodated by more efficient use of land and buildings within existing centres. Local planning authorities should aim to increase the density of development, where appropriate. Opportunities within existing centres should be identified for sites suitable for development or redevelopment or where conversions and change of use will be encouraged for specific buildings or areas. Local planning authorities should also seek to ensure that the number and size of sites identified for development or redevelopment are sufficient to meet the scale and type of need identified.

- 2.15 Where growth cannot be accommodated in identified existing centres, local planning authorities should plan for the extension of the primary shopping area if there is a need for additional retail provision or, where appropriate, plan for the extension of the town centre to accommodate other main town centre uses.
- 2.16 Where existing centres are in decline, PPS6 states that local planning authorities should assess the scope for consolidating and strengthening these centres by seeking to focus a wider range of services there, promote the diversification of uses and improve the environment. Where reversing decline is not possible, local planning authorities should recognise that these centres may need to be reclassified at a lower level within the hierarchy of centres, and reflect this revised status in the policies applied to the area.
- 2.17 The statement clarifies that the key tests of need, appropriate scale, impact, sequential approach and accessibility, apply equally to new development, renewal of extant consents, variation of planning conditions and changes of use. In the context of development control, the policy statement requires all applicants to demonstrate appropriate scale and accessibility. Need, sequential and impact tests vary according to the type and location of development.
- 2.18 It is not necessary to demonstrate the need for retail proposals within the primary shopping area of a town centre. This is designed to ensure planning constraints on town centre schemes are less onerous. In reality, a need assessment is likely to be required on larger schemes to enable an informed judgement in relation to the scale and impact of development. Need must be demonstrated for any application for a main town centre use, including retail, which would be in an edge-of-centre or out-of-centre location.
- 2.19 In terms of the sequential approach, site selection should be applied to all development proposals for sites that are not in an existing centre, nor allocated in an up-to-date development plan document. The sequential approach requires that locations are considered in the following order:
- First, locations in appropriate existing centres where suitable sites or buildings for conversion are, or are likely to become, available within the development plan document period, taking account of an appropriate scale of development in relation to the role and function of the centre;
 - Edge-of-centre locations, with preference given to sites that are or will be well connected to the centre;
 - Out-of-centre sites, with preference given to sites which are or will be served by a choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre.
- 2.20 Proposals to extend an individual store, in any location, less than 200 sq m gross are exempt from the sequential approach. For larger proposals, PPS6 advises Local Planning Authorities to take into account any 'genuine difficulties', which the applicant can demonstrate are likely to occur in operating

the applicant's business model from the sequentially preferable site in terms of scale, format, car parking provision and the scope for disaggregation.

- 2.21 PPS6 states that impact assessment should always be undertaken for applications in an edge-of-centre or out-of-centre location and which is not in accordance with a development plan strategy. An application for a significant development in a centre, not in accordance with the development plan strategy, and which would substantially increase the attraction of the centre and could have an impact on other centres, the impact on other centres will also need to be assessed.
- 2.22 In terms of the appropriate scale of development, local planning authorities should ensure that the scale of opportunities identified are directly related to the role and function of the centre and its catchment. The aim should be to locate the appropriate type and scale of development in the right type of centre, to ensure that it fits into that centre and that it compliments its role and function in the defined retail hierarchy.
- 2.23 The Government continues to seek to reduce the need to travel, to increase the use of public transport, walking and cycling and reduce the reliance on the private car, to facilitate multi purpose journeys and to ensure that everyone has access to a range of facilities. Jobs, shopping, leisure and tourist facilities and a wide range of services should therefore be located in town centres wherever possible and appropriate, taking full advantage of accessibility by public transport.
- 2.24 In assembling sites, PPS6 states that in planning for growth in town centres, local planning authorities should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their development plan documents, although for large town centre schemes a longer period may be appropriate to allow for site assembly. Local planning authorities should consider the scope for site assembly using their compulsory purchase powers, to ensure that suitable sites within or on the edge-of-centres are brought forward for development, including sites that are under-utilised, such as car parks and single storey buildings, which could be redeveloped for multi storey, mixed use development.

PLANNING CONTROL OF MEZZANINE AND OTHER INTERNAL FLOORSPACE ADDITIONS

- 2.25 During the passage of the Planning and Compulsory Purchase Act 2004, the Government agreed to an amendment (now Section 49) which brought under planning control the creation of additional floorspace within buildings. This amendment was in response to concerns that the development of mezzanine floors in large retail stores significantly increased the available floorspace, thereby undermining the objectives of planning policy for the regeneration of town centres. For example, where development takes place in an out-of-centre location and there isn't the need for additional floorspace or sequentially preferable opportunities for development exist.
- 2.26 Installation of additional floorspace within a building, such as building a mezzanine floor, did not previously fall within the definition of development of the Town and Country Planning Act 1990.

Permission was only required if the original permission for the building was granted subject to a planning condition precluding a mezzanine floor or restricting the maximum floorspace and that floorspace would be exceeded. Many older permissions, granted before 1995/96 did not include maximum floorspace conditions.

- 2.27 The provision incorporated within the 2004 Act does not seek to prevent such development, but to allow authorities to determine such proposals, in the same way as they would for store expansion involving an external expansion of floorspace, which would require planning permission. The proposals will apply only to increases in internal gross floor space above 200 sq m gross, to prevent smaller, town centre businesses from being adversely affected.
- 2.28 The consultation period on the ODPM report ('Planning Control of Mezzanine and Other Internal Floorspace Additions' March 2005) relating to the proposed changes ended on 26 May 2005. The proposals will come into force on 10 May 2006 following a detailed review of consultation responses. If works to install the new floorspace have already begun when the new rules come into force, they can be completed, but a Certificate of Lawful Use or Development will cease to have any effect from the date that the new rules come into force.

PPS12: LOCAL DEVELOPMENT FRAMEWORKS, 2004

- 2.29 PPS12 sets out the Government's policy on the preparation of local development documents which will comprise the local development framework. The local development framework is not a statutory term, however it sets out, in the form of a 'portfolio', the local development documents which collectively delivers the spatial planning strategy for the local planning authority's area.
- 2.30 The Local Development Framework (LDF) will be comprised of local development documents including statutory development plan documents and non-statutory supplementary planning documents which expand policies set out in a development plan document or provide additional detail: -
- Development Plan Documents: have been subject to independent examination and have the weight of development plan status as defined by Section 38(6) of the Act: and
 - Supplementary planning documents: are not subject to independent examination and do not have development plan status. They must not be used to allocate land or contain policies that should be subject to independent examination.
- 2.31 The LDF will also include the statement of community involvement, the local development scheme and the annual monitoring report. Furthermore, local planning authorities should also include any local development orders and/or simplified planning Zones which have been adopted. The LDF, together with the regional spatial strategy, provides the essential framework for planning in the local authority's area.

- 2.32 The Local Development Scheme (LDS) is a public statement of the local planning authority's programme for the production of the full suite of local development documents. Local planning authorities must submit their first local development scheme to the Secretary of State within six months of commencement of Part 2 of the Act (The Planning and Compulsory Purchase Act 2004) (July 2004).
- 2.33 The Local Development Framework should include the following statutory development plan documents:
- i) Core strategy;
 - ii) Site specific allocation of land; and
 - iii) Area action plans (where needed).
- 2.34 The Core Strategy should set out the key elements of the planning framework for the area. Once adopted, all other development plan documents must be in conformity with it. The core strategy should normally be the first development plan document to be produced, except where the local planning authority has up-to-date saved policies and where the priority in the local development scheme is the preparation of an area action plan or other development plan documents.
- 2.35 Area Action Plans (AAP's) should be used to provide the planning framework for areas where significant change or conservation is needed. A key feature of AAP's will be the focus on implementation, providing an important mechanism for ensuring development of an appropriate scale, mix and quality for key areas of opportunity, change or conservation. AAP's with a geographic or spatial dimension will benefit from having development plan status in contrast to their previous status as supplementary planning guidance. They should:
- Deliver planned growth areas;
 - Stimulate regeneration;
 - Protect areas particularly sensitive to change;
 - Resolve conflicting objectives in areas subject to development pressures; or
 - Focus the delivery of area based regeneration initiatives.
- 2.36 In areas of change, AAP's should identify the distribution or uses and their inter-relationships, including specific site allocations, and set the timetable for the implementation of the proposals. Further guidance, such as the layout of uses within these allocations and design requirements etc, may be provided in the relevant AAP or in one or more supplementary planning documents in the form of a master plan.

USE CLASSES ORDER 2005

- 2.37 Proposals for radical changes to the Use Classes Order (UCO) were first announced in Parliament in November 2003. The Planning Minister at the time, Keith Hill, claimed that the new look UCO would be welcomed, stating, 'these will give local authorities more control to manage town centre development while minimising the negative impacts of a proliferation of pubs, takeaways and night clubs'. The proposed changes took effect on 21st April 2005.
- 2.38 The reforms at present are limited to the 'A' (retail) Use Class and to Night-clubs. Only restaurants and cafes will retain their A3 classification, with a permitted change to A1 or A2 Use Classes, but with all other changes of use requiring planning permission. Under the reforms, pubs and bars will be reclassified under a new and separate use Class A4, with a permitted change to A1, A2 or A3 Use Classes, with all other changes requiring planning permission.
- 2.39 Takeaways have been reclassified under a new and separate Use Class A5, with a permitted change to A1, A2 or A3 Use Classes, with all other changes requiring planning permission. Nightclubs have been classified as Sui Generis and are excluded from the Use Classes. This brings nightclubs under specific and separate planning control. Planning permission will be required for any change of use to or from Nightclub use.
- 2.40 In addition to these changes further amendments include the reclassification of Internet cafes as an A1 use, Retail Warehouse Clubs are re-affirmed as sui generis use (i.e. constituting a class of its own), and motor vehicle showrooms no longer enjoy permitted development rights to change to A1. Keith Hill has told Parliament that the Government has decided not to amalgamate the A1 and A2 classifications, a move which was suggested in 2002.

PPG13: TRANSPORT, MARCH 2001

- 2.41 PPG13 reaffirms the Government's policy position towards retail development, as outlined in PPS6. In particular, paragraph 35 of the guidance endorses the need to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments. Furthermore, it reaffirms the Government's requirements for retail development to adopt a sequential approach, with preference given to town centre sites, followed by edge of centre and, only then, out-of-centre sites in locations which are (or will be) well served by public transport.
- 2.42 PPG13 notes that if there is clearly an established need for such development and it cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine the proposal with existing out-of-centre developments, provided that improvements to public transport can be negotiated. PPG13 requires that development plans set maximum levels for parking. The guidance makes it clear that there should be no minimum standards for development, other than for parking for the disabled.

THE SOUTH EAST PLAN

- 2.43 The South East Plan is a new type of plan, stemming from the 2004 Planning and Compulsory Purchase Act. Once adopted it will provide the statutory regional framework for development in the south east through to 2026, setting out scale, priorities and broad locations for change. The Draft South East Plan Part 1: Core Regional Policies was approved in July 2005.
- 2.44 The full Plan, to include Part 2: Sub-regional Details, will be submitted for Government approval in Spring 2006. Once it has Government approval it will become a legal document that local authorities and other government agencies in the region will have to follow. District and Unitary Councils will still deal with local planning applications, but they will have to ensure their decisions do not conflict with the principles in the Plan.
- 2.45 The Plan promotes the merits of sustainable development reaffirming that urban areas and existing centres should be the focus for development. Accordingly town centres are promoted as the focal point for the development of a mixture of uses to include leisure, services, retail, residential and commercial.
- 2.46 The Plan highlights that the 'Sussex Coast' sub region contains a large number of challenges to future development. It is recognised that most of the centres in this catchment have a strong tourist draw and little room for retail expansion. Priorities for support include responding to the needs, characteristics and opportunities of each town/group of towns. The Plan states that centres should seek to maintain and improve their environmental quality.
- 2.47 Policy TC2 of the Plan identifies Brighton as a Primary Regional centre and as such states that the centre should be the focus for major retail developments; uses which attract large numbers of people including major cultural, tourism, social and community venues; employment, particularly large scale leisure and office developments and a range of housing, where possible provided as part of wider mixed use developments.

EAST SUSSEX AND BRIGHTON & HOVE STRUCTURE PLAN, 1999

- 2.48 The East Sussex and Brighton & Hove Structure Plan was adopted in 1999 and provides the broad strategic planning framework for the County of East Sussex and the City of Brighton & Hove. The Structure Plan provides the broad strategic planning framework which the Local Plan translates into a detailed set of policies and proposals to guide the development of Brighton & Hove. The overall aim of the Structure Plan is to 'seek a more environmentally future for the County and to meet the needs for development and change in a manner that is more sustainable in the long term'.
- 2.49 The key objectives of the Structure Plan are to:
- protect and enhance the environment;

- achieve economic prosperity;
- provide for local housing requirements and contribute to meeting regional demand;
- regenerate urban areas;
- achieve prosperous and attractive rural areas;
- achieve better integration with mainland Europe;
- seek integration of transport and reduce the need to travel;
- match infrastructure and services to needs; and
- match policies, priorities, resources and programmes.

2.50 For Brighton and Hove, the Structure Plan (Policy S13) states that attention will be focused on revitalising and regenerating the physical fabric of the urban area in a manner that strengthens its important role as an international resort and regional centre and enhances the townscape quality.

2.51 To protect the landscape and its setting, the Structure Plan envisages no further outward expansion of Brighton and Hove's built-up area other than in exceptional circumstances where the early release of land for employment uses could be justified on economic grounds and in terms of environmental impact (Policy E10).

2.52 The Structure Plan highlights the need to focus on the regeneration of vacant and underused sites within the urban area to improve the local economy and the environment. It envisages further progress in providing for a range of transport modes other than the private car to improve accessibility and the quality of the environment.

2.53 Policy SH1 seeks to strengthen the role of Brighton as a regional shopping centre, and Eastbourne and Hastings as sub-regional centres. The Plan seeks to do this by addressing their particular needs, especially with regard to the provision of larger shop units. The Plan states that Local plan policies for central Brighton should continue to place strong emphasis on improving the range and quality of shopping and other facilities.

2.54 Under policy SH2, local plans need to include positive policies and proposals to improve the attractiveness of existing shopping centres as locations for retail activity. Such policies should be based on a detailed assessment of the overall health of different centres, their strengths and weaknesses, future needs and the capacity for further retail development. Where a need for additional retail floorspace has been identified, local plans should allocate suitable sites or clearly indicate the preferred locations for new development.

BRIGHTON & HOVE LOCAL PLAN

- 2.55 The Brighton & Hove Local Plan was adopted in July 2005. The Plan recognises the importance of supporting town and local centres and sustaining and enhancing their vitality and viability. Policies SR4/5/6 set out a retail hierarchy as follows:
- Regional Shopping Centre - Brighton
 - Town Centres – London Road and Hove
 - District Centres – St James’s Street, Lewes Road, Brighton Marina and Boundary Road/Station Road.
 - Local Centres – including, Mill Lane, Portslade, Seven Dials, Fiveways etc.
- 2.56 The Policy approach taken is to ensure that any out of centre retail development does not have a harmful impact on the shopping centres. In the defined prime frontages predominantly retail uses will be retained whilst permitting complementary uses such as banks and cafes. Policy SR7 also aims to strengthen the role of local parades and corner shops that provide valuable local facilities particularly for less mobile members of the community.
- 2.57 Policy SR1 sets the criteria for controlling new retail development within or on the edge of an existing defined shopping centre. The purpose of the policy is to ensure that new retail development supports and enhances existing shopping centres. Out of centre retail development is controlled by policy SR2 which states in line with PPS6 that unless a site has been identified in the Local Plan then the need for the development will have to be demonstrated.
- 2.58 Retail warehouses are controlled under policy SR3 and policy states that where permission is granted for new retail warehouses the types of good sold will be strictly restricted to bulky goods only and the subsequent sub-division of units will be restricted as is the construction of mezzanine floors.
- 2.59 Policy SR4 seeks to ensure that within the prime frontages of Brighton regional shopping centre that at least 75% of uses are class A1. This is in order to maintain Brighton’s role as the principal shopping centre in East Sussex, which the Council consider is of considerable importance to the economic and social life of Brighton & Hove.
- 2.60 The Local Plan recognises in policy SR5 that Town and District shopping centres commonly serve community needs for both comparison and convenience goods shopping, together with a range of non-retail services such as banks, building societies, cafes and restaurants. The centres should be capable of fulfilling an important function as a focus for both the community and for public transport.

- 2.61 It is acknowledged that Brighton's town and district centres have suffered over the past decade from economic downturns and increased competition from out of centre retailing, and a more flexible approach is needed to ensure that their vitality and viability is maintained and enhanced. In particular, policy SR5 states that there should still be a predominance of at least 50% of retail (Class A1) units retained in each town centre.
- 2.62 The Plan recognises the problems of noise and public disorder caused by large bars and nightclubs and an objective of the Council's policy is to make town centres feel safer for all users. Therefore policies aim to control the number, size, location and management of bars/clubs so that they can operate in safety and minimise their environmental impact.

SUMMARY

- 2.63 Government guidance makes clear that sustainable development is the core principle underpinning planning. Accordingly PPS1 sets out a range of overarching policies aimed at facilitating sustainable patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community.
- 2.64 PPS6 reaffirms the Government's commitment to protecting/sustaining town centres. Accordingly the central objective of the guidance is to promote the vitality and viability of town centres by planning for the growth of existing centres and enhancing existing centres by promoting them as the focus for new development. Where growth cannot be accommodated in identified existing centres, local planning authorities should plan for an extension to the primary shopping area. It makes clear that where reversing the decline in centres is not possible, local authorities should consider reclassifying such centres within the retail hierarchy.
- 2.65 In allocating sites and assessing proposed development, PPS6 requires local planning authorities to assess the need for the development; identify the appropriate scale, apply the sequential approach, assess the impact on existing centres; and ensure locations are accessible and well served by a choice of means of transport. Local planning authorities after considering these factors, should consider the degree to which other considerations such as physical regeneration, employment, economic growth and social inclusion are relevant.
- 2.66 PPS12 sets out the Government's policies on the preparation of local development documents which will comprise the Local Development Framework. PPS12 indicates that the statutory development plan documents will include a Core Strategy, site specific allocations and Area Action Plans.
- 2.67 The South East Plan aims to provide a regional framework to 2026. It promotes the merits of sustainable development reaffirming that urban areas and existing centres should be the focus for development. Having regard to the "Sussex Coast" sub region local authorities are encouraged,

amongst other things, to respond to the different needs, opportunities and characteristics of each town.

- 2.68 The East Sussex Structure Plan seeks to safeguard the vitality and viability of existing centres, allow these centres to evolve to the changing needs of consumers and retailers, and to guide shopping provision into a more sustainable form. The Brighton & Hove Local Plan sets out the retail hierarchy for the city and policy aims to ensure that out of centre retail development does not harm these centres.
- 2.69 The Local Plan aims to retain predominantly retail uses in the defined prime frontages and also aims to strengthen the role of local parades and corner shops that provide valuable local facilities particularly for less mobile members of the community. The Plan recognises the problems of noise and public disorder caused by large bars and nightclubs and therefore policies aim to control the number, size, location and management of bars/clubs.

3. RETAIL TRENDS

3.1 To put our assessment of the quality of existing provision and the need for additional floorspace into context, it is relevant to consider the wider economic and social trends likely to influence retailing in Brighton & Hove. A number of trends are likely to have a bearing on the future pattern of retail provision in Brighton & Hove, and the opportunities arising from development proposals. This section examines key trends and drivers for change in the retail industry. We outline the key national trends in retailing and service provision of relevance to Brighton & Hove drawing from a range of published data sources, including research by Verdict Analysis, Mintel and the New Economics Foundation.

i) Income and Expenditure

3.2 The retail sector has seen significant changes over the last 25 years, which have fundamentally altered the way we shop. One of the main drivers behind change has been the growth in incomes and expenditure. Consumer retail expenditure per head over the last 25-30 years has grown at an average compound rate of about 3% per annum in real terms, but most of this growth has been in comparison goods, with virtually no increase in convenience goods expenditure.

3.3 Over the last 25-30 years comparison goods expenditure per head has shown growth of nearly 5% per annum in real terms, i.e. an overall increase of over 200% in real terms over the last 25 years. In contrast, convenience goods expenditure per head has increased at less than 1% per annum in real terms. Over the last 15-20 years even stronger growth has occurred, particularly in recent years. Such very strong expenditure growth trends are unlikely to continue, but reasonably strong growth in line with long term trends appears probable over the medium-long term.

3.4 Strong income and expenditure trends have also affected retailing in another important way – the rise in car ownership and mobility. Over the last 25 years the number of households owning one or more cars has increased from about 55% to about 75%. Equally significant, the number of households with two or more cars has nearly trebled from 11% to 30%. Households are now much more mobile than they used to be and therefore their choices for shopping centres to visit and the distances they can travel are much greater.

ii) Out-of-Town Retailing

3.5 Over the past 10 years, out-of-town has been the engine of retail growth. While retail sales as a whole increased by 62.1%, sales in out-of-town (OOT) stores grew nearly twice as fast, at 118%. OOT retail parks have provided retailers with larger, lower cost units than in town centre locations and they have used this opportunity to broaden their product offer and drive down prices. It has been a winning formula not just for grocers, superstores, and bulky goods retailers but also, if carefully applied, for a growing number of high street retailers.

- 3.6 In 2004, however, sales from OOT retail parks grew by 6%, the second lowest rate ever. While this still significantly outstrips total retail expenditure of 3.7%, it is a significant decline from the 6.2% of 2002. In its brief history, OOT sales growth has always been driven by physical expansion but an increasingly hard line taken by local authorities as they seek to interpret government policy has cut the number of new parks approved. Planning refusals have become common and this has caused a cutback in new store expansion plans. In 2004 space grew by only 3.5% - the lowest growth rate on record. As a consequence, many OOT retailers are becoming more innovative in store design, in-store merchandising and, in many cases, customer service.
- 3.7 Verdict expect OOT sales growth to slow over the next five years, especially in 2005-6 due to tough trading conditions before the outlook eases in 2007 with greater site availability from the more liberal policy framework of PPS6. On a five year perspective, Verdict expect OOT sales growth (including contribution from online sales) to be slower than in 1998-2003 (6.7% per year) at 5.5% per year. A shortage of new sites and cost increases force retailers to place greater emphasis on improving same store sales, which they expect to increase from 1.4% to 2.4% per year.
- 3.8 While lobbying by retailers has been successful in watering down some of the most restrictive elements of the government's original proposals, the latest planning policy statement is still strongly in favour of consolidating retail activity in town centres whenever possible. This will mean that while OOT growth slows down, sales growth in in-town locations will strengthen over the next five years and space will grow slightly on account of major urban renewal schemes.
- 3.9 Nevertheless, Verdict expect OOT retail sales to experience an overall growth of 31% over the next five years, considerably faster than retail spending as a whole. It is, however, a slower rate than OOT achieved over the past five years because the difficulty of obtaining planning consents will limit new development. Conversely in-town sales will show a faster rate of increase over the forecast period as town centre renewal projects contribute to more robust growth.
- 3.10 In terms of individual sectors, Verdict expect clothing and footwear to be the fastest growing OOT sector, with sales up 54.5% over the next five years. Retailers are taking up more units on shopping parks to take advantage of more spacious accommodation. General merchandise retailers will also grow strongly (35.4% over the next five years), in particular Argos. This trend is reflected on a number of retail warehouse parks where a number of clothing and general merchandising retailers, including Next, Boots, Gap, Borders, Peacocks and Carphone Warehouse, are becoming increasingly common. Electrical retailers are expected to grow by 35.3% driven by demand for new technologies such as LCD TVs and recordable DVDs.
- 3.11 According to Verdict, Grocers' OOT sales will grow more slowly than other sectors but it will remain the largest sector accounting for 63.9% of all OOT sales in 2009. This rate of growth is much faster than the 15.4% growth expected in spending on food due to the increasing quantity of space at grocers' large OOT stores devoted to non-food products – where demand is growing more strongly.

iii) Town Centre/High Street Retailing

- 3.12 Despite the growth of OOT retailing, high street retailers (including those in shopping centres) clocked up sales of £122.7 billion in 2004 or 47.1% of the money spent by consumers on retail. The High Street's share of all retail spending is only fractionally down on its 50.8% share of 10 years ago. While OOT sales have grown massively and online retailing is also now taking a growing share of the market, it is convenience goods retailers located in the neighbourhood that have borne the brunt of this migration of shoppers and not the high street.
- 3.13 Deflation has become a major issue for retailers on the high street. In 1993-98, high street retailers experienced average annual inflation selling prices of 2.4%, but over the last five years there has been deflation of 0.7%. Several factors have contributed to deflation, including aggressive price competition from OOT retailers creating a growing price differential with their high street rivals. But OOT competition is not the only explanation; on the high street itself, new low cost retail models such as Primark, Savers and Wilkinson are able to challenge established retailers like M&S, Boots and Woolworths.
- 3.14 The High Street has become a high cost location. A shortage of units in prime locations has put upward pressure on already high rents, employment, insurance and distribution/servicing costs are rising, as are tax burdens for retailers signing new leases. Despite these difficulties many high street retailers are thriving. The thrivers (Argos, Debenhams, HMV, John Lewis and Next) have managed to grow sales by 62.8% or £4.2 billion over the last five years, while the strugglers (Bhs, Boots, Dixons, House of Fraser and M&S) have only achieved a 12% or £1.5 billion uplift in sales. The most important ingredient for reinforcing margins appears to be a distinctive product offer.
- 3.15 Perhaps the most encouraging indicator of the long term health of the high street is the strong pipeline of new developments over the next five years. As planning consent for OOT sites has become harder to gain, developers have switched their attention back to the city centre. Though 2004 was a relatively quiet year for development after the boom of 2003, there is a strong pipeline of new centres for 2005-2008. Many of these schemes have taken years to receive approval and will provide much needed revitalisation of town and city retail infrastructure, enabling people across the country to benefit from a much richer retail mix.

iv) Number of Shop Units

- 3.16 National retail trends indicate a continuing contraction in the number of shop units. Total store numbers in the UK have declined by 11% over the last 10 years. This masks variations in the decline of different types of stores and different locations. With the emergence and growth of superstores during the 1990s, there has been a decline in the number of smaller and more specialist food retailers. The number of food specialists has declined by 19% from 48,301 in 1992 to 39,131 in

2002. Whereas the number of large superstores has increased by 50% from 860 in 1992 to 1,292 in 2002.

3.17 During 1992-2002 leading supermarket multiples increased their share of the grocery market, as a result of the success of the superstore format. Superstores have grown their market share from 30% in 1992 to just over 40% in 2002. In Brighton & Hove, Asda in Hollingbury and the Marina, Tesco Church Rd, Sainsbury's Lewes Road, Coop Nevill Rd and Sainsbury's Hangleton, illustrate this trend.

3.18 Certain specialists have suffered more than others. The fishmongers share of the total grocery market has declined from 0.5% in 1992 to 0.1% in 2002. Butchers have also lost nearly 2% of their market share, declining from 4.1% to 2.2%. Greengrocers, bakers and other specialists have been slightly more robust, yet all three have lost market share. While local neighbourhood centres will retain a more localised 'top up' role, many are likely to decline irrespective of new development proposals.

v) Retail Polarisation

3.19 The last few years have seen a sustained fall in the pipeline OOT shopping centre and retail park development. A corresponding resurgence in town centre activity has been mainly concentrated into a few large schemes in dominant regional centres. The top 70 centres in the country now attract over 50% of the country's population for comparison goods shopping. Almost half of the shopping centre floorspace in the pipeline is destined for these same 70 centres' which will further reinforce their dominant market share.

3.20 The growth of multiple traders and increased competition between traders has meant that the retail structure is increasingly dominated by large companies. In tandem with this change has been the desire by multiple traders to occupy larger shop units. Shopping centres which have been able to accommodate this demand for larger sized units (typically 500-2,000 sq m or larger in the largest centres) have grown in importance reinforcing the trend of higher order centres growing in relative importance, i.e. polarisation in the retail hierarchy. The growth in car ownership and mobility, coupled with increased affluence, has led to shoppers travelling greater distances to shop in larger centres with a strong retail offer.

vi) The Internet and Non Store Trading

3.21 Home shopping (mail order and internet shopping) is the main component of non-store retailing. In total, non-store retailing amounts to about 7% of comparison goods expenditure. Mail order has a long history, and whilst it has suffered to some extent from the rise of the internet, it has evolved and new retailers have entered the market and expanded, such as Next and Marks & Spencer and more recently John Lewis. GUS bought Argos and Homebase and Littlewoods bought Index. These retailers expect home shopping to play an increasing, but supplementary, role to traditional store based shopping.

- 3.22 The growth of e-tailing has been phenomenal over the last few years, but from a very small base. Growth rates of 70% per annum were not unusual two years ago, but growth has now come down to about 30% per annum, but this is still a very strong growth rate compared to bricks and mortar retailing. It is estimated that about 5% of retail expenditure is now conducted on the internet, although most foodstore operators have closed their virtual stores or warehouses and operate home deliveries out of existing stores. Books, games, DVDs/ videos and CDs along with finance, insurance and travel services have been the most affected, but small electrical goods, computer hardware and software, white goods, toys and gifts, and some clothing and footwear could see internet sales take an increasing share of retail spending.
- 3.23 It is possible that retail warehouses could suffer proportionately more than town centres, due to the types of goods sold in them, but all centres will be affected to a greater or lesser extent depending on the type of goods they sell and the function they perform. Where town centres adapt, and become more leisure orientated, and retailers increasingly use their shops as showrooms running web sites in parallel, conventional retailing should continue to prosper, but price competition and low inflation/deflation looks likely to be a permanent state of affairs.
- 3.24 In the convenience sector it is considered that internet shopping is unlikely to have a significant effect in the future. Although Verdict predict that growth will be fuelled by the increasing savviness of consumers and ordering is speeded up by broadband, overall they forecast that this will not have a significant effect on sales. Verdict predict that on-line grocery sales will increase from £1.4bn in 2001 to £5.3bn by 2007, this will still however only make up 4% of all grocers and food specialist sales.

vii) Convenience Retailers

- 3.25 The leading foodstore operators are continuing to innovate to increase their market share. Some have developed smaller store formats such as Tesco Metro and Sainsbury's Local and have been more innovative in their town centre proposals. Discount retailers continue to seek opportunities to expand their networks. There has also been a growth in 'forecourt' retailing, operated either by the large supermarket chains or the major oil companies. These are likely to present opportunities for local neighbourhood convenience facilities serving new and existing communities in the City.
- 3.26 In the past five years supermarket multiples have strengthened their hold on the UK grocery market, taking share from most other operators in the process. Independent and smaller chains of grocers and convenience stores have been the key losers and acquisition targets, with 2003 share of the market a mere third of the level in 1998. All food specialists have come under pressure while off-licences have suffered heavily from the growing 'beer, wine and spirits' offer of both major grocers and convenience stores.
- 3.27 The growing share of the supermarket multiples has primarily been driven by the performance of four players – Tesco, Asda, Morrisons and the Co-op, which between them have put 9.8% on their

combined market shares over this period. These players have emerged as the leading sales winners among UK grocers, while the rest of the market has typically struggled. At a national level the pressure for larger superstores and hypermarkets will continue, although any further proposals for expansion of existing out-of-centre convenience stores must be considered in terms of need, sequential approach and impact.

viii) Convergence of Retail and Leisure

3.28 Since the mid-1990's, despite higher rents, there has been a steady trend, driven by central government policy, towards building new leisure schemes in town/edge of centre locations. A number of factors have helped drive the growth of leisure venue provision in town and city centres. For example, urban living is back in fashion; town centres can offer consumers a much more vibrant atmosphere in which to eat and drink; and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is 'daytime trade', and the ability to capitalise on proximity to businesses and shoppers.

3.29 This change in location has also been combined with the inclusion of leisure complexes that incorporate both retail and leisure facilities. Leisure facilities can be used as a way of encouraging customers to stay longer and consequently spend more. The Trocadero in London's West End is an example of this, with mainstream retailers such as HMV, Whittards, Sock Shop and Accessorize taking advantage of the high pedestrian flows created by the major leisure attractions such as Funland, the UGC multiplex and Planet Hollywood. This is also the case in the Metro Centre, Gateshead where a large leisure centre has been incorporated into the retail complex. Mixed-use retail and leisure development has proved to be a real growth area in town centres.

THE NEXT FIVE YEARS

i) Retail Operating Influences

3.30 Retail deflationary price pressures are expected to intensify, due to the growth of the internet, competition amongst retailers, globalisation, the strong £ etc. This will force retailers to concentrate on supply chains, cut costs and be more efficient. This will favour the larger retailers who have stronger buying power and encourage take-overs to achieve improved economies of scale, i.e. the larger and stronger multiples will grow larger and stronger.

3.31 On-line sales will continue growing strongly, as broad band becomes cheaper and more widely used. Traditional catalogue mail order is likely to suffer most, not the high street. Verdict expect that on-line sales will increase 155% (20% pa) over the next five years (2004-2009), whereas total retail spending will increase by 21% (3.9% pa) and mail order spending will increase by 8.7% (1.7% pa). Verdict expect total retail sales to be £317.1 bn in 2009, of which £291.5 bn will be store based and

£25.6 bn will be non-store based (on-line, mail order and TV shopping). Interestingly the on-line total is made up of £10.1 bn from bricks and mortar retailers, £3.1 bn from Pure Play internet retailers and £2.5 bn from mail order on-line sales.

ii) Social Influences

3.32 Verdict expect a continuation of present trends of longer working hours and the decline of the nuclear family, so affecting when spending occurs and on what. They expect further growth in convenience stores, located near where people live, and work and longer opening hours to cater for longer working hours.

3.33 Over the next five years the over 60's age group will grow by 13m or 14.5% and half of that growth will be in the 60-64 age group. The Under 60's age group will decline by 0.2m (or -0.5%). The age profile of the Brighton primary catchment population includes a particularly high proportion of the retired aged 65 and over. Other over-represented age groups include adults aged 25-44 and young adults aged 15-24. In contrast, children aged 0-14 are particularly under-represented within the Brighton area and older working aged adults aged 45-64 are moderately under-represented. Between 1991 and 2001 Brighton saw a lower than average decline in 15-24 year olds, a decline in the retired and an increase in 25-44 year olds, which is in contrast to the pattern across other town centres.

3.34 Older shoppers have a younger mindset than in the past, are more fashion aware and financially better off as a result of house price growth as well as income growth (but pensions will be a concern). They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Younger shoppers will have higher University fees to pay, will experience higher housing costs, will spend more on entertainment/leisure and so will have less to spend in the retail sector.

iii) Technological Influences

3.35 Verdict expect major changes that will affect the supply chain. RFID (radio frequency identification) is a microscopic electronic tag within each product that is set to replace the ageing bar code. This will enable retailers to identify individual articles rather than specific types of products and it does not require contact with a scanner as radio signals can be picked up within a range of about 20 feet. They can also be scanned very quickly and do not require individual scanning.

3.36 XML (Extensible Mark-up Language) will transmit information between computers and will affect the relationship between retailers and suppliers. This is an improvement over the currently used EDI (electronic data interchange) as computers running different software can communicate with each other. These new technologies will help reduce costs, enhance collaboration between retailers and suppliers, bring new products to the market quicker and improve efficiency.

SUMMARY

- 3.37 National retail trends indicate a continued growth in incomes and expenditure, albeit not at such strong levels as in the last 15-20 years. The growth in expenditure is focused on comparison goods with virtually no increase in convenience goods expenditure.
- 3.38 Increased car ownership has resulted in greater household mobility and therefore the choices for shopping centres to visit and the distances that can be travelled are much greater. Internet shopping has grown phenomenally in the last few years and looks set to continue in certain sectors, it remains however only a very small percentage of overall spending.
- 3.39 Retail planning policy has become much more focused on promoting and protecting town centres. Although new forms of retailing, such as purpose built out-of-centre regional shopping centres, factory outlet centres and retail warehouse parks have emerged, where these are out-of-centre, they are now largely restricted by planning policy.
- 3.40 The foodstore operators have continued to evolve their formats and offer. With restrictions on out-of-centre stores growing, and changing socio-economic trends, several large operators have returned to the high street with small convenience stores. Operators are also seeking to extend their comparison goods offer, turning stores into variety or mini department stores. This trend poses a threat to smaller centres, where the large out-of-centre stores become one stop shopping destinations negating trips to the town centres.
- 3.41 There has been a continued polarisation towards larger centres and the provision of larger stores in these larger centres. Where smaller centres have been unable to diversify their offer or create niche markets they have suffered. The focus on urban renewal has increased demand for town centre sites for a wider range of land uses.
- 3.42 Since the mid-90s, despite higher rents, there has been a steady trend, driven by central government policy, towards building new leisure schemes in town/edge of centre locations. Mixed-use retail and leisure development has proved to be a real growth area in town centres. These trends present significant opportunities and challenges to Brighton & Hove. Brighton & Hove is well placed to benefit from forecast spending growth but the city needs to adapt if it is to capitalise on these opportunities, and maintain and enhance its position within the wider region.

4. SUB-REGIONAL CONTEXT

- 4.1 This section examines the role of Brighton & Hove in the wider sub-region, and the relationship with the network of key competing centres. We draw on DTZ's Town Centre Futures report commissioned by SEERA, The South East Plan, and the Household Telephone Survey.
- 4.2 The newly commissioned Household Telephone Survey enables a detailed understanding of shopping patterns within Brighton & Hove and the wider catchment area, and forms an important input into each element of the Retail Study. A total of 1,000 households were interviewed across the agreed Zones (Plan 2), and the chosen research and marketing company (NEMS) monitored the profile of the respondents on a one-by-one basis, allowing them to check that the profile is representative. The survey established the shopping habits of households for convenience and comparison goods, and for the purposes of this section, enabled a detailed understanding of the relationship of catchment areas across the sub-region. The results of the survey are attached in Appendix 5.
- 10.4 To ensure a sensible geographical boundary for the survey area we drew on the Regional Assessment commissioned by SEERA (2004), and GVA Grimley's specific localised knowledge from recent work in adjoining authorities (Mid Sussex District Council, Horsham District Council and Lewes District Council). The telephone survey boundary also took into consideration the local authority boundary in relation to the existing retail hierarchy, the adjoining catchment population/urban areas, out of centre retail provision and competing centres in the wider catchment. We drew on the in-centre shopping survey to analyse in-flows of trade into the survey area, including trade from Shoreham.

RETAIL RANKING

- 4.3 To assist the review of RPG9, the Regional Assembly, through its Town Centre and Retail Task Group, commissioned DTZ in June 2004 to carry out a study to forecast future retail growth in the main regional/sub-regional catchment areas in South East England.
- 4.4 The output of the study aims to inform and develop town centre and retail policies for the South East Plan. It was not the intention of the study to allocate future growth to any specific town centre, but to indicate where within the region growth is likely to occur, and the range of floorspace that centres in each catchment area could accommodate. It is for the Local Development Frameworks to identify appropriate allocations for each town centre.
- 4.5 DTZ drew together a number of key performance indicators to produce a composite ranking of the region's top centres. Key performance indicators included total floorspace, number of outlets, total floorspace occupied by multiples, the size of outlets, department store/variety store representation,

leisure businesses and café restaurant floorspace. Table 4.1 illustrates the rank position of Brighton City Centre and Hove town centre and the competing centres in the Sussex sub-region.

Table 4.1: Town Centre Futures Rank Position: Brighton Sub-Region

CENTRE	Town Centre Futures Rank (DTZ)	South East Plan Allocation
Brighton	9	Primary Regional Centre
Worthing	13	Primary Regional Centre
Tunbridge Wells	15	Primary Regional Centre
Crawley	16	Primary Regional Centre
Eastbourne	17	Primary Regional Centre
Horsham	27	Secondary Regional Centre
Hove	51	-
Lewes	68	-
Haywards Heath	70	Secondary Regional Centre
Burgess Hill	86	-
Uckfield	97	-
Shoreham By Sea	143	-
Newhaven	157	-

Source: SEERA

COMPETING CENTRES

- 4.6 We have drawn on the Household Telephone Survey to identify the level of comparison goods trade diverted to Brighton's key competing centres in the sub-region (Appendix 1). Trade leakage to competing centres is illustrated on Plan 3. It is evident from Table 4.2, that Brighton City Centre is the dominant shopping centre within the survey area (Zone 1-12), consistent with DTZ's ranking of centres and its allocation as a Primary Regional Centre in the South East Plan.
- 4.7 In terms of trade draw, Burgess Hill has the strongest influence on comparison goods shopping patterns in Brighton's catchment area, after Brighton. This is largely a consequence of its geographic location, centred within the survey area encompassing the centre's full catchment area. Crawley's influence on the catchment area is evident, despite being located beyond the survey area boundary. This regional influence is consistent with its role as a Primary Regional Centre defined in the South East Plan.

Table 4.2: Brighton and Competing Centre Comparison Goods Trade Draw

Centre	Trade draw from catchment area £000	% of available comparison goods expenditure
Brighton	601,219	39.0
Burgess Hill	72,760	4.5
Hove	66,896	4.2
Crawley	57,590	3.6
Haywards Heath	54,434	3.4
Lewes	36,921	2.3
Worthing	28,095	1.7
Uckfield	26,279	1.6
Shoreham	25,929	1.6
Royal Tunbridge Wells	13,328	0.8
Central London	12,880	0.8
Horsham	11,710	0.7
Eastbourne	11,685	0.7
Newhaven	8,035	0.5
TOTAL	1,027,761	65.4

Source: Household Telephone Survey, September 2005

- 4.8 In the rest of this section we consider the current composition and role of Brighton's principal competitors, and the challenges posed by new developments planned or underway within them.

BURGESS HILL

- 4.9 Burgess Hill (in Zone 6) is located in Mid Sussex District Council. The topography and a new distributor road to the west have served to contain development within the town, and a link road (A2300) connects the built up area to the primary road network. According to the adopted Local Plan (May 2004), Burgess Hill is the fastest growing settlement in Mid Sussex, experiencing an increase in population from 8,500 to 28,803 between 1951-2001.
- 4.10 The Experian Goad town centre report (May 2004) identifies that Burgess Hill comprises a total of 31,679 sq m of ground floor floorspace for retail trade and services, in 188 units. The centre has an above average representation of units occupied by retailers in the comparison and service categories; with a particularly high number of building society uses and estate agents/auctioneers. Experian Goad highlights that in terms of key retailers, Burgess Hill has just 7 (out of 26) key attractors. This reflects the centre's position as a lower order centre relative to the wider retail hierarchy.
- 4.11 Burgess Hill's prime pitch includes the Martlets shopping precinct, the Market Place indoor shopping centre, the pedestrianised Church Walk and the section of Church Road running from Cyprus Road

to Lloyds TSB Bank. Key retailers on the pedestrianised section of Church Walk include BeWise Clothing, First Choice Travel Agents, Curry's Electrical Appliances and Peacocks Clothing and Household Goods.

- 4.12 The Martlets Shopping Centre is an open air shopping precinct which opened in 1970 and is accessed from the pedestrianised Church Walk and the market place indoor shopping centre. The scheme has a retail floorspace of approximately 10,200-sq m gross, located on one level with approximately 30 retail units. The shopping centre now appears relatively dated, constructed from reinforced and pre-cast concrete materials with flat roofs and a general 1970s concrete appearance. The centre is anchored by Argos, Iceland, Lidl and Somerfield and the Library and community centre is situated to the rear of the shopping centre accessed by Civic Way.
- 4.13 Market Place indoor shopping centre is a newer scheme accessed by Church Road and the Martlets Shopping Centre. The indoor scheme opened in 1991 and has a retail floorspace of approximately 11,148 sq m gross. Falling within the primary shopping frontages, the centre is anchored by Waitrose Foodstore, Boots the Chemist and Wilkinson, and is served by the 400 space Station Road car park.
- 4.14 Currently there are no commitments or proposals within the town centre. However several development opportunities exist and the Council is keen to reinforce the town's role. Within the adopted Local Plan they have allocated land between the Martlets Shopping Centre and Civic Way, including the multi-storey car park, for redevelopment to include retail, including food superstore, leisure/entertainment, residential flats and civic, public and voluntary services. The Council are working with their chosen development partner, Thornfield, to strengthen the centre's role and are assessing prominent town centre locations for retail led and mixed use development.

CRAWLEY

- 4.15 Crawley, one of the first designated New Towns, is situated in the county of West Sussex, approximately 9 miles to the west of East Grinstead. Crawley's primary catchment area extends to East Grinstead in the east and Burgess Hill in the south, encompassing Haywards Heath. The catchment area extends almost to Reigate in the north and Horsham in the west. The centre's catchment area overlaps with Brighton's.
- 4.16 It is evident from the results of the Household Telephone Survey that Crawley draws circa £57.9m of comparison goods expenditure from within the defined survey area, which equates to 3.6% of total available comparison goods expenditure. This trade draw is amongst the highest of the competing centres, despite the centre being located beyond the survey area boundary, and reflects its regional shopping role. Crawley has its strongest market share in Zone 6 and 7 with an 18% and 12% market share respectively.

- 4.17 Crawley has a retail floorspace of approximately 85,500 sq m, concentrated in two main locations: a pedestrianised precinct comprising Queen's Square, Queensway, The Martlets and Broad Walk, and County Mall, a large modern shopping centre. The retail offer is relatively extensive but mainstream and department store provision is limited to a large, modern Debenhams in County Mall, and TJ Hughes. Other large stores include Marks & Spencer and Littlewoods on Queensway, and Woolworths on Queen's Square.
- 4.18 County Mall shopping centre is a two-level centre with a floorspace of approximately 42,250 sq m and opened in 1992. County Mall has a diverse tenant mix and a noticeably higher quality offer than the rest of the town centre. Large stores in the centre include Debenhams, Bhs, Virgin Megastore, Waterstones, Boots and WH Smith. Fashion retailers include River Island, Warehouse, Laura Ashley, Oasis, Wallis, The Officers Club and French Connection; whilst concessions/labels within Debenhams include Jacques Vert, Planet, Principles, Oasis and Eastex.
- 4.19 Mainstream multiples located elsewhere in the town centre include Next, Superdrug, Primark, Dorothy Perkins/ Burton, New Look and Etam. The quality of provision immediately outside County Mall has improved following a major redevelopment of the east side of The Martlets. The scheme has attracted H&M, HMV, Top Shop/ Top Man, Sports Soccer and The Works.
- 4.20 Two retail schemes in the pipeline will significantly enhance the retail offer in Crawley town centre. Crest Nicholson is currently developing an eleven unit development totalling 5,000 sq m at the western end of Queen's Square. Reported pre-lets at the scheme, which is due to be completed by Autumn 2005, include Slater Menswear, Peacocks and Costa Coffee. On a larger scale, discussions are ongoing for a large-scale redevelopment in the northern part of the town centre. A draft feasibility study has been published which proposes 68,000 sq m of additional retail space, 400 residential units and offices. The council have selected a development partner (Grosvenor) and John Lewis have reportedly been secured to anchor the scheme with a 23,300 sq m store.
- 4.21 Retailer demand to locate in Crawley has grown in recent years, although this is not reflected in its rank position. In October 2000 the centre had 79 requirements equating to a rank position of 49, and by October 2004, the number of requirements had risen to 96 but the centre's rank position remained static at 49, reflecting the stronger growth in demand in centres across the country. Fashion/clothing retailers reported to be seeking premises in Crawley include Base, Krisp, Republic, USC and Zara. Other multiple retailers include Blacks, Gamestation, Fired Earth, Nike, Lush, The Pier and TK Maxx.

HAYWARDS HEATH

- 4.22 Haywards Heath is situated approximately 5 miles north of Burgess Hill, to the north east of the District of Lewes. Experian Goad highlights that the centre comprises a total of 31,958 sq m gross of ground floor floorspace for retail trade and services, comprising 213 units. The centre is located within Zone 7 of the Brighton survey area, and is defined as a Secondary Regional Centre in the South East Plan.

- 4.23 The Experian Goad assessment also highlighted that Haywards Heath has an above average representation of units occupied by retailers in the comparison and service categories. The number of comparison retail units is 7.9% above the national average, and the centre has a particular particularly high proportion of hardware and household goods, furniture, carpets and textiles, arts/crafts and stationers/copiers, charity shops and variety store operators. The number of units occupied by men's and women's clothing is in line with the national average. Of the 213 units, 92 (43%) are occupied by multiple retailers. This figure is above the national average of 34% and represents a strong vitality indicator for the centre.
- 4.24 The primary shopping frontage in Haywards Heath runs from the Sussex Square roundabout in the south to the Church Yard in the north along South Road. The Orchard Shopping Centre accessed via South Road is also part of the primary shopping frontage. The key retailers on South Road include The Link mobile phone shop, Boots the Chemist, WH Smith, Woolworths and Choices video rental. A number of banks are also located in the primary shopping frontages including Lloyds TSB bank, Barclays, Abbey, Halifax and HSBC. The larger retail units are located on the stretch of South Road between Sussex Square roundabout and the junction with Haywards Road; north of Haywards Road the retail units are significantly smaller with a more varied range of occupier.
- 4.25 The Orchard Shopping Centre opened in 1982 and has a retail floorspace of approximately 9,290 sq m gross. The part covered centre is located over one level and anchored by a Marks and Spencer with food store. The shopping centre has a range of national multiple retailers attracting shoppers including Superdrug, Boots, Clarks shoes, Dorothy Perkins, Accessorize and Julian Graves health food shop. The centre currently has no vacant units reflecting the demand from retailers for space and the constrained nature of retail accommodation in Haywards Heath.
- 4.26 In the north of the town centre Victoria Park and the Church and Church Yard separate the primary shopping frontages on South Road with the secondary shopping frontages stretching along the Broad Way. This area of town is characterised by a number of restaurants and cafes including Café Rouge, Pizza Express, Viva Restaurant, Bar Boo Bar, The Orange Square Bar and Restaurant and The Canton Chef Chinese Restaurant.
- 4.27 Currently there are no development commitments or proposals in Haywards Heath. However, the Council are working with their chosen development partner, Thornfield, to strengthen the centre's role and are assessing prominent town centre locations for retail led and mixed use development.

LEWES

- 4.28 Lewes is located in East Sussex and has good road links on the M23 and the national motorway network (Brighton by-pass). The centre lies on the direct rail link to Gatwick Airport and London, approximately 40 and 60 minutes respectively. There is also an east-west service linking the centre with Brighton and Eastbourne. Lewes draws approximately £36.9m of total available comparison goods expenditure, or 2.3%, from the Brighton survey area.

- 4.29 Lewes is an attractive, historic centre with a distinctive character. The main shopping provision runs east to west, along the High Street, the traditional focus of the centre, down Schools Hill into The Friars and onto Cliffe High Street beyond.
- 4.30 The centre contains 244 units, including 58 multiple retailers. The majority of these are located along The Friars, a pedestrianised thoroughfare linking the High Street to the west with Cliffe High Street to the east, known locally as “The Precinct.” The only purpose built shopping provision in the town centre is the Eastgate Centre, anchored by a Safeway superstore. Other generally mid market multiples, including Argos and Woolworths, are set amidst higher quality independent retailing and service uses. The retail offer in this part of the centre is focused primarily on high order comparison retailing, including Southdown Antiques, Sapphire Interior Decorations and Louis Potts who specialise in China and Glassware. On the first Saturday of every month a farmers market is held in the pedestrian precinct, a popular event that reinforces this areas role as the prime focus of economic activity.
- 4.31 A Tesco superstore is located approximately 500 metres to the west off The Precinct. Whilst this is located within the Town Centre, as defined by the adopted Local Plan, it is sited on the opposite side of the River Ouse, beyond the Phoenix Causeway dual carriageway and is divorced from the centre’s primary retail frontages. The store provides a café, customer toilets and a delicatessen. Generally, the store appears busy and relatively cramped. Given the physical limitations of the site, opportunities to extend the store appear limited.
- 4.32 Lewes’ only out-of-centre retail unit is the Homebase off Brooks Road, on the Mallings Brook Industrial Estate. Located in what appears to be a converted industrial unit, the store provides a poor retailing environment and does not appear to be well used. The store has little in the way of a retail frontage and there is only very limited commercial branding. Whilst some store car parking is provided this is very limited and tightly confined and the majority of customers have to park on the adjacent streets. Inside the retail environment is outdated and in need of refurbishment, whilst the range of goods are limited by the physical constraints of the building. The centre lacks any mainstream large electrical or DIY retailers.
- 4.33 To the west of the centre, Cliffe was traditionally a separate village and as such the High Street is defined by a less grand, yet unique, architectural style and is narrower than either the High Street or The Precinct. The bridge over the River Ouse, another of the centre’s key attributes, acts as a gateway into what is effectively another distinctive quarter within the centre. Harvey’s Brewery and the Riverside Brassiere are also prominent on the townscape at this point, which adds further to the character of this end of the centre.
- 4.34 Lewes is well connected to the local and regional road network. The A27 provides direct access to Brighton and Eastbourne, whilst the A26 links Lewes directly with Uckfield and Royal Tunbridge Wells beyond. Following the completion of the Brighton by-pass the centre also benefits from good road links to the M23 and the national motorway network beyond. The centre is on the direct rail link

to Gatwick and central London, and there is also an east to west service linking the centre with Brighton and Eastbourne. This also serves Newhaven and Seaford.

- 4.35 Traffic detracts from the historic character of the centre in places. This is especially evident to the west of the centre, along the High Street, where bottlenecks cause congestion and queuing. The limited car parking provision within the centre compounds these issues. However, the indications are that Lewes is trading well and represents a vital and viable town centre. Only 5.75% of the total units within the centre were vacant at the time of the last formal assessment. This is much lower than the national average of 10.26%.
- 4.36 Retailer requirements in Lewes are low compared to the competing centres of Brighton and Crawley. Requirements have, however, increased slightly in recent years. In October 2000 Lewes had 6 requirements equating to a rank of 531, and in October 2004 requirements had risen to 19 and the rank to 365. These include mid market retailers like, Dorothy Perkins and Edinburgh Woollen Mill Ltd, and more specialist national brands such as Fat Face and Hawkshead. This does not allow for the requirements of independent retailers whose needs are not readily identified. The number of retailer requirements for the centre has steadily increased since 1997, suggesting that Lewes' fortunes have steadily improved during recent years. The centre serves an affluent catchment population, and benefits from its attractive, historic environment.
- 4.37 The key barrier to multiple retailers locating within the centre is the size and characteristics of the available units, which explains the limited presence of national brands currently within Lewes. In this respect the nature of the units available will have a significant bearing on the fortunes of the town centre. The only significant development opportunity within the centre is the Eastgate Centre. Previously the focus of an initial development proposal, the existing configuration does not represent an optimal use of this key site. Development in this location could help provide more mainstream units, reinforce the strength of the centre and maximise the usage of the adjacent Eastgate car park.
- 4.38 In terms of new development, a planning application was submitted in December 2005 for the development of large scale retail unit beyond the Tesco store to the south of the town centre. The proposal is to provide modern A1 retail floorspace amounting to 1,375 sq m gross. Elsewhere, proposals are currently being discussed for a town centre extension to include retail, leisure and residential uses. However, whilst the developer has held exhibitions in the town an application has not yet been submitted.

WORTHING

- 4.39 Worthing is located to the west of Brighton City Centre, beyond the telephone survey boundary. It is defined as a Primary Regional Centre in the South East Plan, and has some influence on comparison goods shopping patterns in Brighton's catchment area. The centre currently draws circa £28m of comparison goods expenditure from the survey area, equating to 1.7% of total available comparison goods expenditure.

4.40 Worthing has an estimated town centre retail floorspace of 103,119 sq m, including one managed shopping centre. The Montague Centre opened in 2001, and has a retail floorspace of approximately 4,645 sq m gross. The centre consists of eleven shop units laid out in a terrace forming part of a pedestrianised retail parade in the centre of Worthing. Retailers include TK Maxx, Clinton Cards, Laura Ashley, Game, MK One and Ciro Citterio. Other key retailers in Worthing include Next, Marks & Spencer, Principles, Debenhams and Bhs.

4.41 Retail demand has fallen in recent years. In October 2002 there were 66 requirements from retailers to locate in Worthing, equating to a rank position of 84, but in April 2005, requirements had fallen to 51, and the centre's rank position had fallen further to 150. There is currently a longstanding consent to create 6 new units to extend the Montague Centre.

UCKFIELD

4.42 Uckfield is located in East Sussex, in Zone 8 of Brighton's survey area. Uckfield draws approximately £26.3m of total available comparison goods expenditure, or 1.6%. Uckfield is significantly smaller in size with a more limited retail offer when compared to other higher order centres in the sub-region. The centre's key anchor stores include Boots the Chemist and Woolworths, and at present there are no major retail schemes in the pipeline to significantly enhance the quality and choice of retail provision in the centre. It functions more as an everyday top up shopping destination for the local catchment population.

4.43 At a national level, retailer demand to locate in Uckfield is particularly weak, although it has strengthened in recent years. In October 2000 there were only three registered retailer requirements, equating to a rank position of 716. In October 2004, these figures had risen to 10 requirements and a significant improvement in rank position to 560. Retailer demand is unlikely to improve in the future based on the absence of proposed/pipeline retail schemes.

SHOREHAM BY SEA

4.44 Shoreham By Sea lies to the west of Brighton on the coast between Brighton and Worthing. The household telephone survey shows that Shoreham draws circa £25.9m (2%) of comparison goods expenditure from the catchment area. As one would expect, the majority of this is from Zone 4, where Shoreham draws 8.5% of available comparison goods expenditure.

4.45 Shoreham's retail provision is limited with no high street fashion retailers present in the town centre, although there is a large Marks and Spencer at an out-of-centre retail park, the Holmbush Centre. Shoreham does have a Boots and a Woolworths in its primary shopping area and a Somerfield supermarket. There are no further retail developments in the pipeline.

ROYAL TUNBRIDGE WELLS

- 4.46 Royal Tunbridge Wells is located in West Kent beyond the north east boundary of the Mid Sussex catchment area. The Tunbridge Wells catchment area extends northwards towards the M25, and southwards towards Hailsham, and although the extent of the catchment area to the west is constrained by Crawley it does overlap considerably with the catchment areas of East Grinstead, Haywards Heath and to a lesser extent, Burgess Hill. The centre is defined as a Primary Regional Centre in the South East Plan.
- 4.47 It is evident from an analysis of the Household Telephone Survey that Tunbridge Wells draws approximately £16m of comparison goods expenditure from within the defined Mid Sussex catchment area. This equates to 3.6% of total available comparison goods expenditure from within Zone 1-10. A closer analysis indicates that Tunbridge Wells has its strongest market share in Zone 6 (11.4%) the Zone closest to the centre.
- 4.48 Tunbridge Wells has a retail floorspace of approximately 109,000 sq m located on an attractive, linear shopping area. The town centre has two department store operators, Fenwicks and Hoopers. Fenwicks offers a range of concessions/fashion collections which include Viyella, French Connection, Betty Barclay, Gerry Weber, East, LK Bennett, Country Casuals, Diesel and Coast. Hoopers is a smaller, independent department store. It also offers a number of concessions/collections including Eastex, Max Mara, Liz Claiborne, Precis Petite and Planet.
- 4.49 The centre has one managed shopping centre: the Royal Victoria Place. It opened in 1992 and has a floorspace of approximately 28,400 sq m located on two levels above a basement food court. The centre accommodates a good range of multiples and a number of key stores including Marks & Spencer, Bhs, Fenwick, WH Smith, Boots, Next and Woolworths. The centre also has a good range of fashion retailers, ranging from mainstream operators such as Gap, Burton, Bay Trading and Oasis, to quality fashion retailers such as Hobbs and Monsoon.
- 4.50 In addition to the main malls, Royal Victoria Place also incorporates a small open-air precinct called Ely Court, which provides kiosks/boutiques occupied by independent/specialist retailers, and a Market Square. Multiple retailers elsewhere in the town centre include Waterstones, Superdrug, New Look, Dorothy Perkins/Top Shop and Kew.
- 4.51 Tunbridge Wells has two further small schemes located at the southern end of the town centre, some distance from the main shopping core. Great Hall Arcade is a small covered precinct located at the southern end of Mount Pleasant Road. Tenants are principally furniture/furnishing retailers and Hoopers' menswear department. At the southern tip of the town centre, is The Pantiles Shopping Arcade Corn Exchange. This small, covered development comprises around thirteen kiosks occupied by independent traders, as well as a café and Heritage Museum.

- 4.52 In terms of new retail development, the Council has identified a need for a substantial amount of additional comparison floorspace within the town centre and has identified four areas within the town centre where retail development would be appropriate. Market Square and Ely Court within Royal Victoria Place has been earmarked for possible future redevelopment to create an additional 9,300 sq m of comparison floorspace.
- 4.53 The local authority have also identified the former ABC cinema site on Mount Pleasant Road for future redevelopment to include a new cinema, with comparison shopping and restaurants at ground floor level. The other two town centre sites – Mount Pleasant House and land south of Grove Hill Road – have been allocated for a mix of town centre uses, including retail.
- 4.54 The number of retailer requirements has increased in recent years. In October 2000 Royal Tunbridge Wells had 96 requirements ranking the centre 30, and in October 2004 requirements had risen to 113, but the centre's rank position had fallen to 35. Developments in the pipeline may generate renewed interest from retailers and improve retailer demand figures and rank position. Current retailers requirements include fashion/clothing retailers Free Spirit, TK Maxx and also TJ Hughes and Argos.
- 4.55 Tunbridge Wells has a slightly high level of demand for a town of its size and status. A broad range of retailers has, apparently, expressed an interest in the town; these include TK Maxx and department store operators, House of Fraser and TJ Hughes. Fashion/clothing retailers reported to be seeking premises include Base, Eisenegger, Krisp, Cotton Traders, Free Spirit, Country Casuals, LK Bennett, Talbots, Whistles and Republic. Other retailers such as Cotswold, Crabtree & Evelyn, Lush, The Pier, Fopp Records and Nike are also reportedly looking for premises in the town.

HORSHAM

- 4.56 Horsham town centre is located in West Sussex, beyond the western boundary of the Mid Sussex catchment area and approximately 15 miles to the north west of Haywards Heath. The centre is defined as a Secondary Regional Centre in the South East Plan. It is evident from the analysis of the Household Telephone Survey that Horsham draws £4m of comparison goods expenditure from the Mid Sussex catchment area, equating to only 1% of total available comparison goods expenditure. (Plan 7).
- 4.57 The main shopping provision is located on West Street, the traditional linear high street; the Carfax, the traditional market square; the new Blackhorse Way scheme; and in the Swan Walk and Piries Place shopping centres. The Swan Walk Shopping Centre opened in 1976 and has a total floorspace of approximately 23,200 sq m gross, including a 929 sq m extension that was added in 1989. The centre is anchored by Bhs and Marks & Spencer, and other key retailers include Wilkinson, Boots the Chemist, Dorothy Perkins, WH Smith and Superdrug.

- 4.58 A number of additional comparison goods multiple retailers are located on West Street, the 'traditional' pedestrianised High Street, including Clarks Shoes, The Early Learning Centre, Mothercare, Next, Millets, H Samuel and Robert Dyas. The pedestrianised Carfax is the general location for service and financial businesses and some specialist retailers. Piries Place is an open precinct anchored by Waitrose and a number of more specialist retailers including Bang and Olufsen.
- 4.59 Retailer representation was enhanced recently following the completion of the Blackhorse Way retail scheme. Alders department store and TK Maxx anchor the scheme, although the future of the Alders unit is uncertain now that Alders are in administration and the store has closed and remains vacant with no current retailer interest. The development incorporated an extension to the existing Sainsbury's store and a new bus terminal and piazza.
- 4.60 Retailer demand to locate in Horsham is lower than both Brighton and Crawley. In October 2000 there were 44 registered retailer requirements to locate in Horsham equating to a rank position of 133. In October 2004 the number of requirements had risen to 53, although the centre has experienced a decline in rank position to 136. At present there are no further major town centre retail schemes in the pipeline to significantly enhance the retail offer and enhance the influence of Horsham in the Mid Sussex catchment area although the in-centre leisure complex could increase the overall attraction of the centre.

EASTBOURNE

- 4.61 Located directly to the east of Brighton, Eastbourne's primary catchment area spans from Crowhurst in the east to Lewes in the west and as far north as Heathfield. Linked to Brighton via the A27 and Uckfield to the north by the A22, Eastbourne is easily accessible from much of Sussex.
- 4.62 It is evident from the results of the Household Telephone Survey that Eastbourne draws circa £11.6m (0.7%) of comparison goods expenditure from within the defined survey area. Eastbourne has the strongest market share in Zone 10 with a 9% trade draw. Eastbourne draws no trade from Zones 1, 2, 5, 6 and 7.
- 4.63 Town centre retail floorspace within Eastbourne is estimated to total some 99,000 sq m. Of this, 29,000 sq m is located within the Arndale Centre, Eastbourne's only shopping centre. Opened in 1981 the centre is served by an adjacent multi storey car park and prominent tenants include, Marks and Spencer's, Boots, Clarks Shoes and Clinton Cards. Elsewhere the centre has a strong representation of national retailers including Bhs, Co-op Department Store, Debenhams and Littlewoods.
- 4.64 There are no formal development schemes in the pipeline. However, the Council has recently issued a planning framework for the regeneration of Eastbourne Town Centre. The Council has identified that Eastbourne needs modern units in a size and configuration demanded by leading business in the retail sector, and is seeking a retail scheme which increases the total retail provision in the town

centre by up to 26,600 sq m. The Council expect that the development will provide for a new anchor department store, two or three other major space users together with a range of smaller shop units.

NEWHAVEN

- 4.65 Newhaven Town Centre is located within Zone 12 of the Brighton survey area. The centre comprises a compact high street, running east to west and the Newhaven Square development to the eastern end. Secondary frontages are located either end of the High Street on South Way to the east and Bridge Street to the West. Currently the centre comprises a total of 10,869 sq m of ground floor floorspace in 81 units.
- 4.66 The Newhaven Square precinct comprises a Somerfield food store and the town centre's main car park and as such effectively anchors the centre as a whole. Other operators within the Square include Peacocks Clothing and Barclays and Halifax Banks. The other notable retailers within the centre, Boots, Woolworths and Mckays, are located in larger units on the High Street. Elsewhere, the centre is made up of a number of independent, low order, comparison retailers and service providers meeting local needs. A street market is currently held twice a week within the centre which helps attract additional footfall, but concern has been expressed as to the quality of its offer.
- 4.67 Overall the centre has a limited retail offer and as such it appears to be struggling to attract trade from outside the immediate area. The centre has a significant number of vacant units. The Somerfield unit appears to trade relatively successfully and underpins the centre's convenience function. Beyond this, there are few complementary convenience operators and much of the comparison provision is low order.
- 4.68 As of October 2004, Newhaven had 8 retailer requirements, which represents a significant enhancement since 2000 when only one operator had a requirement to locate in Newhaven. Interest from national operators includes requirements from Argos, Bon Marche, Cardfair, Superdrug and KFC. However, at the current time retailers will struggle to realise such requirements within the centre.

SUMMARY

- 4.69 It is evident that Brighton appears to be performing in line with its intended role as a Primary Regional Centre, dominating its catchment area in terms of comparison goods expenditure. While lower order centre is located within the survey area will continue to take a proportion of trade, we consider Crawley is Brighton's key competing shopping destination. Also defined as a Primary Regional Centre, Crawley provides a strong shopping destination, and although it lacks the specialist/niche-retailing present in Brighton, its retail offer will be substantially enhanced following the Town Centre North scheme. Although smaller, the proximity of Eastbourne is also likely to have implications for Brighton City Centre if a new town centre scheme comes forward. It is unlikely that

any other centres have the ability to significantly impact upon Brighton's market share or its position in the retail hierarchy over the forthcoming LDF period.

5. BRIGHTON REGIONAL CENTRE

5.1 Having examined the sub-regional context and identified Brighton's position and performance relative to its principal competitors, in this section we set out the results of our detailed assessment of the vitality and viability of the centre, based on the PPS6 indicators. We draw on our own detailed on-site surveys and research, the Brighton Health Check undertaken by Brighton & Hove, and local sources including the Economic Partnership (Town Centre Management), the Research and Performance team (City Council), the Major Projects team (City Council), and Sustainable Transport (City Council).

DIVERSITY OF USES

5.2 Brighton has a total of 162,701 sq m gross of ground floor floorspace for retail trade and service uses, comprising 1,223 units. The extent of this floorspace is illustrated on Plan 11. It should be noted that the floorspace figures derived from Brighton City Council only show the footprint of units, within the building lines, and do not provide a definitive figure of net or gross floorspace.

5.3 Table 5.1 highlights the composition of Brighton by the number of units, with retail trade categories as defined by Experian Goad. The centre has an above average representation of units occupied by retailers in the comparison category at 7.23% above the national average, which is accounted for by a high proportion of clothing stores and jewellers. There is, however, an under representation of department stores.

5.4 The number of units occupied by convenience and service units is below the national average. Although there is an under provision of service units, the proportion of restaurants and cafes is well above the national average, reflecting Brighton's role as a visitor/tourist destination.

Table 5.1: Brighton Composition by Number of Units

Retail Trade Group	Outlets Number	%	% GB	Variant %
Convenience	65	5.31	9.14	-3.83
Comparison	669	54.7	47.64	+7.06
Service	295	24.12	31.75	-7.63
Vacant	75	6.13	10.10	-3.97
Miscellaneous	119	9.73	1.37	+8.36

Source: Brighton & Hove City Council and GVA Grimley On-site Survey September 2005

Note: Miscellaneous: Employment, careers and Post Offices

Table 5.2: Brighton Composition by Retail Floorspace

Retail Trade Group	Floorspace Sq m Gross	Floorspace Sq m Net	% of Total Net Floorspace	% GB	Variant %
Convenience	6,450	3,828	4%	17%	-13%
Comparison	91,498	54,696	56%	53%	+3%
Service	34,983	21,003	22%	21%	+1%
Vacant	7,034	4,214	4%	8%	-4%
Miscellaneous	22,736	13,641	14%	1%	+13%
TOTAL	162,701	97,382	100%	100%	

Source: Brighton & Hove City Council and GVA Grimley On-site Survey September 2005

Note: Miscellaneous: Employment, careers and Post Offices

- 5.5 In addition to retail floorspace, Brighton has a wide variety of leisure attractions. The key concentrations of leisure facilities are not within the defined shopping frontages. National chains of pubs such as Wetherspoons, Walkabout and Yates Wine Lodge as well as Creation nightclub and an amusement arcade are located on West Street south of the shopping frontage. Most of the other nightclubs and bars in Brighton are located on the regenerated seafront. There are a large number of restaurants located on Preston Street (just off of Western Road) but these are not located within the defined shopping frontage.

RETAILER REPRESENTATION

- 5.6 A multiple retailer is defined as being part of a network of nine or more outlets and their presence can enhance the appeal of the centre. In Brighton, multiple retailers occupy 332 of the 1,223 units (27%) compared to a national average of 34%. This figure may suggest a weakness in Brighton's retail offer, but it is important to note here the substantial number and quality of independent specialist retailers in Brighton contributing to a high proportion of total retail units. The low proportion of multiple retailers is not in itself a sign of under performance or weakness in this instance.
- 5.7 Experian Goad highlight 26 key attractors as a bench mark to judge centres against, and it is evident from our analysis that Brighton has 23 of these retailers (Table 5.2). The figures demonstrate the good representation of key multiple retailers you would expect to see in a shopping centre of regional importance, but also highlights the weaker department store offer in the centre.

Table 5.2: Key Attractors, Brighton City Centre

Key Retailers			
Argos	1	Sainsbury's	1
Bhs	1	Superdrug	1
Boots the Chemist	1	Tesco	1
Burton	1	Topman	1
Clarks	1	Topshop	1
Debenhams	1	Virgin Megastore	1
Dixons	1	W H Smith	1
Dorothy Perkins	1	Waitrose	1
H&M	1	Waterstones	1
House of Fraser	0	Wilkinson	0
John Lewis	0	Woolworths	1
Marks & Spencer	1		
New Look	1		
Next	1		
River Island	1		

Source: Experian

5.8 Brighton has a number of distinctly different but interconnecting shopping areas, providing a unique shopping experience. For the purposes of the Brighton City Centre health check we have divided the centre into six 'shopping quarters', which enables a more detailed understanding of the composition of the centre. The shopping quarters are illustrated on Plan 11, and are defined as follows: -

- A Western Road (Secondary Retail Frontage);
- B Churchill Square/Western Rd (Primary Retail Frontage);
- C Queens Road/West Street (Secondary Retail Frontage);
- D The North Laine (Primary Retail Frontage);
- E North Street (Primary Retail Frontage);
- F The Lanes/Dukes Lane/East Street (Secondary Retail Frontage).

A Western Road (Secondary Retail Frontage)

5.9 This stretch of Western Road is defined as Secondary Retail Frontage, and stretches west from the Primary Retail Frontage, parallel with the coast towards Hove. The retail area runs from Montpelier Road in the east to Holland Road in the west, and the number and quality of retailers continues to decline with distance from the core shopping area until it begins to approach Holland Road and the beginning of Hove Town Centre.

- 5.10 Retail units are occupied by a range of operators including estate agents, laundrettes, hairdressers, off licenses, home furnishings/household goods, gift shops and small scale convenience goods units. Tesco Express is located on the junction with Holland Road on the outer boundary of the City Centre. This retail area has a high proportion of vacant outlets compared to the rest of the centre, and the highest proportion of convenience outlets, although this does largely comprise CTN units and off licenses. A number of convenience outlets are, however, improving in quality, for example the Real Food Co. and Real Patisserie.
- 5.11 Western Road is elongated and shoppers are unlikely to walk the full stretch from the city centre to the outer boundary on Holland Road. Both sides of the retail frontage do, however, back on to dense residential areas, which are likely to benefit retailers through walk in trade. Two-way traffic is heavy in this retail area, and congestion, related to sporadic illegal parking, detracts from the overall environment and inhibits pedestrian flows north/south across the centre. Parking is difficult, preventing passers-by from stopping to shop or browse. Many retail fascias are not well maintained and in places create a cluttered and run down appearance.

B Churchill Square/Western Rd (Primary Retail Frontage)

- 5.12 With the exception of some units on North Street, Churchill Square/Western Road is the only area in Brighton City Centre that has the large, modern store formats that modern multiple retailers require. The key mainstream, higher order national multiples in Brighton City Centre are located here.
- 5.13 Churchill Square shopping centre opened in 1960 and has a retail floorspace of approximately 45,522 sq m over three levels. The centre was redeveloped and extended in 1998, and now provides a bright and modern shopping destination. There are two main retail levels, with a smaller restaurant level above. The centre is anchored by Debenhams, Bhs and Habitat and also houses retailers such as H&M, Virgin, HMV, Mothercare, Miss Selfridge, Foot Locker and Next. Virgin and Next are both located on the upper retail level, but have extensions to a third level. Benefiting from pedestrian access points on Western Road, the shopping centre is one of the key areas of retail activity in Brighton City Centre.
- 5.14 Western Road runs from the Churchill Square shopping centre westwards towards Hove. The major retailers are located on the northern side, across the road from the Churchill Square shopping centre and separated by the busy public transport through route. Western Road is anchored by Marks & Spencer, a two storey retail unit with food hall directly opposite the Churchill Square shopping centre. Adjoining retailers, to the west of Marks & Spencer, include First Sport, Etam, Gap, Primark, New Look, Woolworths and Top Shop.
- 5.15 Beyond Crown Street, the mix of retailers deteriorates, comprising a mix of national multiples and lower order and independent retailers such as Poundland, McDonalds, Argos, Jessops, Millets and JJB Sports. The quality of retailer does not correspond to its designation as a primary retail frontage, although Waitrose (1,103 sq m/120 parking spaces) does anchor the western end of the road, acting

as a pull for shoppers. We understand from local sources that the quality of retailer has declined in recent years, and Western Road is not meeting its full potential as a significant higher order/mainstream shopping destination. This change away from higher order comparison retailers is reflected in the recent opening of a Sainsbury's local foodstore (194 sq m gross) at 147-148 Western Road in the unit previously occupied by a clothing retailer.

- 5.16 The south side of Western Road comprises lower order retailers and service uses as well as a number of discount retailers and vacant outlets. There are a number of banks/financial services, card shops and lower order independent clothing retailers, and the environment is poorly maintained with many fascias showing considerable signs of deterioration. Many units on Western Road are outdated and undersized and do not consequently attract the higher order national multiples that have a requirement for space in the City Centre. There are some exceptions to this with Savers and Taj both occupying larger units.
- 5.17 The pavements on Western Road are narrow, surfaces and street furniture are of poor quality, and there is no soft landscaping. Overall, the busy bus routes and poor pedestrian environment on Western Road hamper pedestrian flows between Churchill Square and the north side of Western Road. We believe there is considerable potential to enhance the pedestrian environment, unit configuration, appearance and national multiple retailer representation within this primary retail area. The pedestrianised area outside Churchill Square shopping centre is a popular meeting place for shoppers, although investment could substantially improve the appearance of this key focal point.

C Queens Road/West Street (Secondary Retail Frontage)

- 5.18 West Street runs parallel south from Churchill Square to the seafront. It is the main focus for the evening economy in Brighton City Centre with a high proportion of pubs, night clubs and an amusement arcade. This street gets particularly busy on a Friday and Saturday night and can have an intimidating atmosphere. West Street suffers from a poor environmental appearance and considerable traffic congestion, exacerbated by Churchill Square and Russell Road car parks.
- 5.19 Queens Road is the main pedestrian route from the train station to the town centre and the pavements can get very crowded. Queens Road has a large number of employment agencies as well as offices and estate agents and there is little draw to the area in terms of retail offer. A Marks & Spencer Simply Food opened within the train station in 2004, and is likely to be a popular top up food shopping destination for commuters travelling home after work.

D The North Laine (Primary Retail Frontage)

- 5.20 Brighton is renowned for its variety and quality of local independent fashion retailers particularly in the North Laine where 300 of the 316 units are currently occupied by an independent retailer. In recent years the area has undergone some gentrification with a number of high quality independent boutiques moving into the area which serve a somewhat different market than the area has

traditionally attracted. There are a number of small, independent, speciality food stores in Brighton, notably, Infinity Foods, Bills and Yum Yum Oriental Supermarket, all located in the North Laine.

- 5.21 The North Laine have a different atmosphere to other retail areas in Brighton due to the type of retail offer and width and pedestrianisation of some streets. The narrow streets and outside café seating give a bustling feel to the area, and retail frontages are individual and well maintained contributing to a unique character. There is, however, evidence of litter, overflowing bins and a generally unkempt environment in places. The modern architecture on the recently completed Brighton Library on Jubilee Street provides a contrast to the surrounding area and adds character and interest to the urban landscape.

E North Street (Primary Retail Frontage)

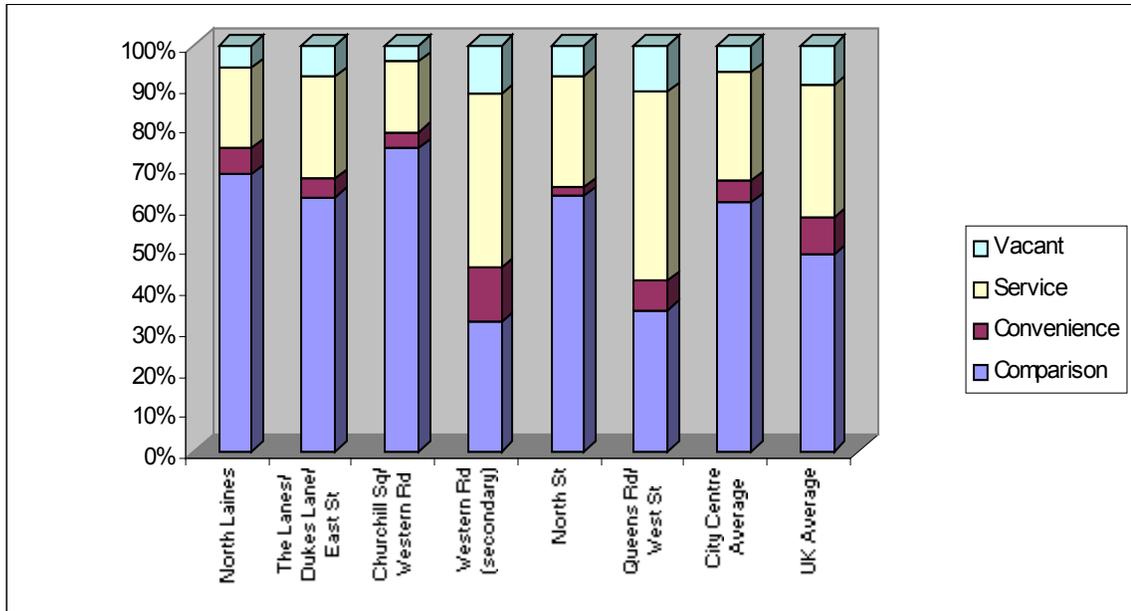
- 5.22 North Street is effectively the spine route in Brighton City Centre. Running east-west, this stretch of primary retail frontage links each of the key City Centre character shopping areas. The retail function of North Street is a key weakness in the overall retail offer and connectivity throughout Brighton. There is no consistency in retail offer or architecture, resulting in a disjointed shopping area. Shoppers are more likely to use the street as a link route rather than a shopping destination in its own right. We believe there is considerable potential to enhance the character of this area, to improve the retail offer, unit configuration, pedestrian environment and linkages with other shopping areas.
- 5.23 A large, mixed use retail and residential 'box' development was completed in 2002, which currently houses Free Spirit, Peacocks and Sports Soccer. The modern development, located towards the western end of North Street, lacks character and appears to have been relatively unsuccessful as a retail location. Sports Soccer is closing for refurbishment, and Uniqlo was previously represented in the unit occupied by Peacocks. The units have a large footprint of between 620 and 710 sq m, although both Sport Soccer and Peacocks have two retail levels. Given the strong level of retailer demand for larger units in Brighton, it is perhaps surprising these units are failing to attract higher order retailers, and may be a consequence of a poor retail mix on North Street, unsatisfactory unit design/configuration, and a sub-standard pedestrian environment and linkages throughout this shopping area.
- 5.24 The recently developed North Street Quadrant adjacent to the Clock Tower has greatly improved the western end. The 'North Street Quadrant' development was completed in August 2005 and an Asda George clothing store has opened, one of the first in the country. Other occupiers include Cult, White Stuff and Rip Curl. The outside of Waterstones has recently been refurbished and the Clock Tower underwent renovations in 2004.
- 5.25 The Southern end of North Street has benefited from the redevelopment of Hanningtons department store, and a number of vacant units have been filled where the growing popularity of the East Street area is having a positive impact. The middle section of North Street has no real character and the

dominant concrete Travel Inn hotel and poor quality paving gives the area a dated and unattractive appearance. Unit occupants include Phones 4 U, Thomas Cook Travel Agent, Nobles Amusement Arcade, Woolwich bank, Jasons Take-Away and a number of vacant outlets. Stronger shopper attractors include Sofa Workshop, The Pier and Benetton. We believe this character area has the potential to attract many of the higher order national multiple retailers that currently have a requirement to locate in Brighton City Centre. Retailers such as LomBok, She Sport and Bravissimo have recently filled vacant units in the area.

F The Lanes/Dukes Lane/East Street (Secondary Retail Frontage)

- 5.26 East Street, which is part pedestrianised, is located to the far eastern end of Brighton City Centre, running south from North Street. Retail representation has improved substantially in recent years and is home to a number of high quality fashion retailers including Hobbs, Russell & Bromley, Jigsaw, East, Cecil Gee and Reiss. On the corner of East Street the former Hanningtons Department Store has been refurbished to create a 5,580 sq m (gross) development which has attracted retailers in keeping with the tenant mix in East Street and the Lanes, such as Ollie & Nic, Mango and Kurt Geiger.
- 5.27 The Lanes, a significant draw for day trippers and tourists, also lie to the south of North Street and the narrow street and arcades provide small units predominately occupied by independent antique shops, designer fashion, up market homeware stores and jewellers. The area has a number of high profile jewellers such as Michael Rose and Jeremy Hoyer. Additional speciality/independent retailers are found on Duke Street, retailers here include Moda Italia, Profile Menswear and Space NK.
- 5.28 The Lanes are characterised by narrow, cobbled streets which have a well maintained and attractive feel to them. Visual and physical permeability is poor but in this particular location this adds to the atmosphere and vibrancy of the area. The adjoining Regent Arcade has a very high quality feel to it although a number of vacant outlets can make the area feel quiet. A recently reconfigured unit here has been recently occupied by Kew. Duke Street links West Street to The Lanes, and again the narrow busy street has a bustling, well maintained, high quality feel to it. There has recently become a notable vacant unit in this area when Elephant furniture store vacated 1-2 Duke Street which has 5 floors of available retail space.
- 5.29 Drawing on data provided by Brighton City Council, Figure 5.1 illustrates the composition of the different character areas in Brighton City Centre. It is evident that Churchill Square/Western Road, North Laine, North Street and The Lanes have the highest proportion of comparison goods retailers; and Western Road/Queens Road and West Street have the highest proportion of service uses. The highest proportion of vacant units are identified within the secondary frontages on Western Road and on Queens Road/West Street.

Table 5.1: Composition of Areas within Brighton City Centre



Source: Brighton & Hove City Council and GVA Grimley On-site Survey September 2005

RETAILER DEMAND

5.30 Table 5.3 summarises the change in the number of retailer requirements for Brighton together with the relative change in its rank order. Since 2002 Brighton has been in the top ten centres in terms of retailer requirements and although the number of requirements has fluctuated slightly over time there was strong growth between 2004 and 2005, with a marginal increase in rank position.

Table 5.3: Retailer Requirements

No. of Requirements	Ranking (1 st Highest)	Date
187	6	Apr 05
169	7	Apr 04
174	5	Apr 03
180	6	Apr 02
131	13	Apr 01

Source: Focus Property Intelligence, September 2005

- 5.31 Table 5.4 provides a more detailed picture of retailer requirements for Brighton. At September 2005 the Focus Property Intelligence Database identifies 194 requirements, including 110 comparison, 16 convenience and 67 service operators. In total these operators require between 153,817 and 245,859 sqm gross of retail floorspace. The full breakdown is attached at Appendix 3.

Table 5.4: Brighton City Centre Requirements

Retail Category	No. of Units	Min. Floorspace sq m gross	Max. Floorspace sq m gross
Comparison	110	72,726	116,589
Convenience	16	2,897	4,213
Service	67	78,138	124,917
Miscellaneous	1	56	140
TOTAL	194	153,817	245,859

Source: Focus Property Intelligence, September 2005

- 5.32 The requirements include a range of comparison goods retailers with floorspace requirements of between 72,726 and 116,589 sqm gross. Retailers include high quality department store operators such as Harvey Nichols and House of Fraser. Accommodating these key department store operators in Brighton City Centre in the future, rather than allowing them to locate elsewhere in the sub-region, would substantially enhance the quality of the retail offer in the City Centre and strengthen its position in the retail hierarchy. There are also requirements from a strong range of quality fashion stores such as Zara and Urban Outfitters. Some requirements have now been met, including Kew, Lombok, Oil & Vinegar, Bravissimo, LK Bennett, Moda in Pelle, Sweaty Betty and East, although there is still a significant shortage of space for new users.
- 5.33 There are 16 requirements from convenience operators which include Aldi and a number of bakers. Foodstore requirements should be treated with caution, as some food operators do not register requirements on publicly accessible databases due to the strong market competition for development sites. There are also 67 service requirements, which include a high proportion of restaurants and public houses. Again, some of these have now found space including Las Iguanas, Strada, Eat, Presto and Carluccios.

SHOPPING RENTS

- 5.34 The level of rent which retailers are prepared to pay for retail space within a centre is an indication of the perceived strength of that centre (although other factors such as the availability of floorspace have an impact on rental value). Table 5.5 outlines Prime Zone A retail rents in Brighton City Centre and surrounding centres.

Table 5.5: Comparison of Prime Retail Rents (£ per sq m)

	Rents £ p/sq				
	'00	'01	'02	'03	'04
<i>Brighton City Centre</i>	1,938	1,615	1,776	1,776	1,830
London Road	-	-	-	377	431
Hove	431	538	538	538	592
Crawley	1,292	1,238	1,238	1,399	1,399
Eastbourne	1,023	969	1,023	1,023	1,076

Source: Colliers CRE, June 2004

- 5.35 It is clear that Brighton City Centre demands far higher rents than anywhere else in the sub-region. Rents dropped dramatically between 2000 and 2001 but have been rising steadily again since then, although are not back to the peak in 2000 of £1,938 sq m.

COMMERCIAL YIELDS

- 5.36 The commercial yield on non-domestic property is an indication of the confidence of investors in the long term profitability of the town centre. The yield on property investment represents the return (in the form of rent) on capital to an investor. As property investments do not usually produce a fixed income (i.e. rents are reviewed according to market conditions, and the terms of the property's lease), the greater the prospect of future rental growth, the lower the initial yield which an investor would be prepared to accept. Conversely, a higher yield reflects the lower expectation of future rental growth prospects. Yields are therefore an indicator of expectations of the general economic prospects for a town centre.
- 5.37 Table 5.6 compares prime retail yields in Brighton with other centres in the city as well as other surrounding centres. Yields improved slightly between 2000 and 2001 and although they increased slightly between 2001 and 2002 they have remained steady since then. Brighton has the lowest (and therefore the best) yields than anywhere else in the City and are marginally better than Crawley.

Table 5.6: Comparison of Prime Retail Yields (%)

	% Yield				
	Oct '00	Oct '01	Oct '02	Apr '03	Jan '04
Brighton City Centre	5.50	5.00	5.25	5.25	5.25
London Road	10.00	9.00	>10	>10	>10
Hove	9.00	9.00	8.50	8.50	8.50
Crawley	5.50	5.50	5.50	5.50	5.50
Eastbourne	6.50	6.00	6.00	6.00	6.00

Source: Property Market Report 2004

VACANT RETAIL PROPERTY

- 5.38 The proportion of vacant street level property is one of the relevant indicators which can be used when assessing the vitality and viability of a town centre. It should be used with caution, however, as vacancies can arise even in the strongest town centres, particularly where properties are under alteration. Conversely, the absence of any vacancies can be a symptom of under provision of space, and prevent new retailers and current retailers in the centre from securing new or enhanced representation.
- 5.39 Table 5.7 indicates that there are 73 vacant units in Brighton, equating to a vacancy rate of 5.97%. While this may appear to be a large number, it is well below the national average of 10.10%. Table 5.8 shows the distribution of vacant units around Brighton City Centre. It is evident from these figures that the spread of vacant units around the centre is fairly even with the secondary areas of Western Road and Queens Road having a slightly higher proportion of vacant units.
- 5.40 In the North Laine the majority of the vacant units are within the secondary frontages along Gloucester Road and Trafalgar Street with only 5 vacant units in the primary shopping area. This is also the case with The Lanes/Dukes Street area with the majority of the vacant units being in secondary frontages around Middle Street and Brighton Square. Overall, Brighton has only 31 vacant units within the primary shopping area.

Table 5.7: Brighton City Centre Vacancy Rates

Vacant Units	% of Total Units	National Average (%)	Vacant Floorspace (sq m)	% of Total Floorspace	National Average (%)
73	5.97	10.10	7,034	5.03	8.03

Source: Brighton & Hove City Council and GVA Grimley On-site Survey September 2005

Table 5.8: Vacancy Rates in Brighton City Centre's Shopping Areas

	Vacant Units	% of units
North Laine	17	5%
The Lanes/ Dukes Lane/ East St	23	7%
Churchill sq/ Western Rd	8	4%
Western Rd (secondary)	11	11%
North Street	5	7%
Queens Road/ West Street	9	8%

Source: Brighton & Hove City Council and GVA Grimley On-site Survey September 2005

ACCESSIBILITY

- 5.41 Brighton benefits from good road and public transport accessibility. Brighton Station is situated at the top of Queens Road and is a short walk from the primary shopping areas. The station is served by regular trains from surrounding towns and half hourly trains from London. The city centre is also well served by a number of bus routes most of which stop at Churchill Square and along Western Road. A bus based 'Rapid Transport System' is also being developed which will move people directly between key locations in the City.
- 5.42 There is a Park and Ride scheme that can cater for around 200 vehicles which operates from Withdean Sports Stadium, where buses depart every 12 minutes and stops at a number of places including Churchill Square Shopping Centre. The Local Transport Plan and the Local Plan support the principle of further park and ride facilities but a suitable site has yet to be identified.
- 5.43 Drawing on the Household Telephone Survey, Table 5.9 illustrates how people travel to Brighton City Centre. Almost half of people who use Brighton City Centre travel in by car with the next most popular mode of travel being the bus at 38%. Only 7.4% of people walk into the centre, which reflects the wide catchment area of Brighton.

Table 5.9: Modes of travel

Mode of Travel	Visitors (%)
Car (driver or passenger)	48.3%
Taxi	0.4%
Train	5.2%
Walk	7.4%
Bus	38.1%
Motorcycle	0.2%
Bicycle	0.4%

Source: Household Telephone Survey, September 2005

- 5.44 Brighton City Centre is easily accessible by car from the north, west and east. The City Centre has a total of 3,647 car parking spaces as set out in Table 5.10 below. These car parks are well spread around the City Centre, although the access to major car parks is generally concentrated along the seafront.
- 5.45 This consequently causes difficulties accessing other car parks in Brighton, especially on Saturdays. There is very little on street parking around Brighton and this is heavily enforced.

Table 5.10: Brighton City Centre Car Parks

Location	Number of Spaces
North Rd	25
Trafalgar Street	295
Church Street	587
Russell Road	536
Regency Square	510
Hampton Place	120
Cannon Place	737
Churchill Square	837
The Lanes	200
Total	3,847

Source: Experian Goad/Brighton City Council website

- 5.46 Access by car within the centre varies between areas. Much of Western Road and North Street is a public transport priority area and private cars are not permitted during the day. The majority of the Lanes and a number of streets with the North Laine are pedestrianised. The North Laine also has restricted car access on Saturdays.
- 5.47 The results of the Household Telephone Survey illustrate that 27% of respondents dislike Brighton because it's difficult to park. A further 10.2% of people cite the fact that Brighton is 'difficult to get to by car, bus, foot', and further 8.4% cited 'expensive parking'.
- 5.48 The In centre survey mirrors these results and when asked what improvements could be made to encourage them to visit Brighton more often, 9% of people wanted more parking, 7% wanted cheaper parking and 8% wanted reduced road congestion.

CUSTOMER VIEWS AND BEHAVIOUR

- 5.49 We have drawn on the September 2005 Household Telephone Survey conducted by NEMS Market Research in order to gather information regarding customer views and behaviour. The survey

incorporated a number of attitudinal questions covering likes, dislikes and ideas for improvement. Graphs illustrating the full breakdown of results are attached in Appendix 6.

- 5.50 Respondents who cited Brighton as the centre where they do most of their households shopping for clothes and footwear were asked what they liked most and disliked most about the centre. When asked what they liked most about Brighton City Centre 57% of people cited a 'good range/variety of shops & products', 33% explained the centre is 'near to home or work' and 17% thought it has an 'attractive environment'. When asked what they disliked the most 37% cited 'too crowded, 27% 'difficult to park' and 15% 'unattractive environment/ not a nice place'.
- 5.51 Respondents who cited Brighton as the centre where they do most of their households shopping for clothes and footwear were asked how often they visited the centre. The majority of people questioned visited Brighton between once a week and once a month (29% once a month, 17% once a week, and 18% once a fortnight). When shopping in Brighton 41% of people also visit a café and 38% of people also visit a restaurant. Only 18% of people also do their food shopping when in Brighton City Centre and of those who do, a third of them use the Marks and Spencer Food Hall.
- 5.52 The Household Telephone Survey asked a number of questions with regard to where people travel for their leisure activities, the results of which can be found at Appendix 5. It is clear from these results that a number of people use facilities in Brighton City Centre for leisure activities other than shopping. Table 5.11 shows the percentage of people from the survey area that go to various leisure facilities in Brighton City Centre.

Table 5.11: Respondents from the Survey Area that Travel to Brighton City Centre for Leisure

	Cinema	Bingo	Theatre	Bars/ Clubs	Restaurants
No. of Respondents undertaking the leisure trip	555	54	521	547	782
% of Respondents undertaking the leisure trip	17.7%	3.7%	60.4%	38.9%	40.5%

Note: Percentage illustrates the % of those who undertake specific leisure trips, not the % of total respondents

- 5.53 Cinema and Bingo competition in Brighton is strong, with 49% visiting the UGC cinema at Brighton Marina, and 48.1% visiting the Gala Bingo Club on Freshfield Way, both to the east of Brighton City Centre. Table 5.12 illustrates those people who undertake linked trips within Brighton City Centre when they visit primarily for their clothing and footwear shopping (543 respondents). When shopping in the centre for clothing and footwear, 13% also visit other non-food shops, 26% visit cafes and restaurants, 11% visit financial services and 12% meet friends.

Table 5.12: Brighton City Centre Linked Leisure Trips

Leisure Trip	% of Total Responses
Other non-food shops	13
Visit a café	13
Visit a restaurant	12
Financial services (i.e. bank, building society)	11
Meeting friends	12
Meeting family	9
Food shopping	6
Visit a pub/club	6
Visit the cinema	6
Personal service (i.e. hairdresser/beauty salon)	4
Visit the theatre	3
Other service (i.e. travel agent, estate agent)	3
Other	2

Source: Household Telephone Survey 2005

PROPOSALS/COMMITMENTS

- 5.54 There are currently two commitments for small scale retail development in Brighton City Centre. The North Street Quadrant is located on the junction of North Street, Queens Road and West Street, and construction is now complete. At the time of the household telephone survey, the scheme was under construction and we have therefore highlighted it as a commitment for the purposes of this study. The six storey building comprises a mix of retail (1,322 sq m) and residential floorspace, and has considerably improved the environment in this area through high quality design features. New retailers include George Clothing, Cult, Rip Curl and White Stuff.
- 5.55 The Jubilee Street scheme is based around the new Jubilee Library, just off North Road, and is the focal point for the wholesale regeneration of the Jubilee Street area. The building of the Library began on 19 May 2003 and opened in March 2005. The £45 million library scheme will transform a run-down area in the heart of Brighton with the creation of a new square, hotel, residential, retail and leisure buildings. When complete, the retail element will comprise 1,744 sq m of A1 retail floorspace, and A3 retail floorspace will total 2,616 sq m comprising Carluccio's, Starbucks, Las Iguanas and Yo Sushi.

SUMMARY

- 5.56 Our detailed qualitative analysis of Brighton City Centre indicates that the regional shopping centre is healthy and performing well in a number of health centre indicators. The centre has a strong

proportion of comparison goods retailers, complemented by a substantial number of quality independent specialist retailers. This mix appeals to shoppers and tourists from a wide catchment area, and the centre acts as a visitor/leisure destination of choice. The unique character areas throughout Brighton City Centre are a particular strength, offering a wide range and choice of retail goods.

- 5.57 Furthermore, retailer requirements are growing and the centre is currently ranked 6th in the country; Prime Zone A rents are the highest in the sub-region and have grown in recent years; and retail yields are the lowest in the sub-region and have remained stable in recent years. Vacancy rates are well below the national average and the centre benefits from good public transport provision and car parks. The City Centre evidently acts as a key leisure destination, and the majority of shoppers undertake linked trips between the retail and leisure offer.
- 5.58 Despite the current strong performance of the regional shopping centre, our analysis has highlighted potential signs of vulnerability and areas of opportunity to enhance and strengthen the centre over the forthcoming LDF period. While the centre has an above average proportion of comparison goods retailers, the centre has a weak provision of department store operators compared to similar sized regional centres across the country. This weakness will be exposed further following completion of the Crawley centre redevelopment anchored by John Lewis and a new department store anchored scheme in Eastbourne.
- 5.59 Retailer demand is particularly strong and growing, and the principal problems identified in our assessment are the lack of suitable modern retail units to meet current/future demand, and the limited opportunities for significant new retail development within the core of the centre. In order to enable existing retailers to trade up, and to attract major new retailers to the centre, it will be necessary to identify new opportunities for creating additional retail space, in addition to the ongoing redevelopment and modernisation of current stock, particularly on North Street and primary retail frontages on Western Road.
- 5.60 Despite the strength of the separate character areas throughout Brighton, a major drawback for the centre at present is the poor connectivity linking the centre together to encourage pedestrian flows over a wider area. Poor signage, busy traffic through routes and awkward street junctions and crossing points discourage existing shoppers from visiting certain areas, and does not assist new visitors in finding their way about.
- 5.61 Although Brighton City Centre is served by a number of public transport routes and car parks, traffic congestion in the City has been identified as a major problem through the telephone survey, often with the consequence of discouraging shoppers to visit the centre.

6. HOVE TOWN CENTRE: QUALITATIVE ASSESSMENT

6.1 Hove lies 2 miles to the west of Brighton City Centre. The primary shopping area runs along Church Road, up George Street and along a short stretch of Blatchington Road. The secondary shopping areas of Brighton City Centre and Hove Town Centre run seamlessly together and Palmeira Square acts as a transitional marker between the town centres. PPS6 and the adopted Local Plan states that Town Centres commonly serve community needs for both comparison and convenience goods shopping, together with a range of non-retail services such as banks, building societies, cafes and restaurants. The centres should be capable of fulfilling an important function as a focus for both the community and for public transport.

DIVERSITY OF USES

6.2 Hove has circa 46,418 sq m of ground floor floorspace for retail trade and service uses, comprising 344 units. It should be noted that the floorspace figures derived from Brighton City Council only show the footprint of units, within the building lines, and do not provide a definitive figure of net or gross floorspace. Table 6.1 highlights the composition of Hove by number of units. Units occupied by retailers in the comparison category is 15% below the national average with a particularly low proportion of units in the footwear and clothing categories. In contrast, Hove has an above average representation of charity shops occupying at least 10 units in the primary shopping area. Charity shops, with their short leases, can indicate a lack of investment interest in a centre but in Hove these shops are well-established, of reasonable quality and popular.

6.3 The proportion of units occupied by service businesses is 13% above the national average. There is a particularly strong representation of estate agents, restaurants and cafes. Many of these cafes are likely to be supported by custom from the Brighton & Hove City Council offices which lie within the primary shopping area. In terms of number of units the convenience sector appears to be in line with the national average but this disguises the fact that in terms of floorspace the provision is 3.2% above national average. This is due to the large Tesco store on Church Road which accounts for 54% of all convenience floorspace in the centre.

Table 6.1: Hove Composition by Number of Units

Retail Trade Group	Outlets Number	%	% GB	Variant %
Convenience	30	8.72	9.14	-0.42
Comparison	112	32.56	47.64	-15.08
Service	154	44.77	31.75	+13.02
Vacant	23	6.69	10.10	-3.41
Miscellaneous	25	7.27	1.37	+5.9

Source: Brighton & Hove City Council and GVA Grimley On-site Survey September 2005

Note: Miscellaneous: Employment, careers and Post Offices

Table 6.2: Hove Composition by Retail Floorspace

Retail Trade Group	Floorspace Sq m Gross	Floorspace Sq m Net	% of Total Net Floorspace	% GB	Variant %
Convenience	9,451	5,921	22%	17%	+5%
Comparison	14,206	8,532	32%	53%	-21%
Service	15,333	9,197	34%	21%	+13%
Vacant	1,992	1,195	4%	8%	-4%
Miscellaneous	5,436	2,234	8%	1%	+7%
TOTAL	46,418	27,079	100%	100%	

Source: Brighton & Hove City Council and GVA Grimley On-site Survey September 2005

Note: Miscellaneous: Employment, careers and Post Offices

RETAILER REPRESENTATION

- 6.4 At present multiple retailers occupy 127 of the units in Hove (37%), which is marginally higher than the national average of 34%. While on the surface these figures suggest a strong vitality indicator, they do not reflect the quality of the national multiples. Experian Goad highlight 26 key attractors as a bench mark to judge centres against, and it is evident from our analysis that Hove has only 8 of these retailers. These are Boots, Clarks, Dixons, Dorothy Perkins, New Look, Superdrug, Tesco and Woolworths. This suggests a relatively weak mix in the choice and quality of key town centre attractors within Hove Town Centre, and is likely to reflect its lower order shopping role within the retail hierarchy. There a number of independent upmarket retailers that have recently taken units in Hove, these include Deja Shoes, Velvet, Doggy Fashion, Bert's Homestores and Bagel Man. This indicates that the retail offer is upgrading and strengthening.
- 6.5 The primary shopping frontage in Hove runs along the length of George Street and partly along Church Road and Blatchington Road as shown on Plan 13. With the exception of Tesco and Woolworths, all the key retailers in Hove are located on the pedestrianised George Street. The key comparison attractors of Dorothy Perkins and New Look are in undersized units and it is only Boots the Chemist that has a larger unit on George Street (numbers 58-61).
- 6.6 The units in the secondary frontages are mainly occupied by service operators such as fast food takeaways, estate agents and charity shops. The primary shopping frontage on Church Road has a number of restaurants as well as many of the high street banks.
- 6.7 Iceland and Co-op Supermarkets are located in the primary shopping frontage on Blatchington Road in small (445 and 976 sq m net respectively) and dated units. The Tesco superstore (with a floorspace of 3,317 sqm net) lies just outside the primary shopping frontage on Church Road, although investment has been made in a pedestrian linkage to George Street. The store is bright and

modern with fresh food counters, a mezzanine level coffee shop and car parking for 586 vehicles. The store has three aisles of non-food goods, which include CD/DVDs, books and kitchenware, and appeared particularly busy on the day of our site visit.

RETAILER DEMAND

- 6.8 Table 6.3 summarises the number of retailer requirements for Hove, together with the relative change in its rank order. The centre's rank position has risen from 373 in April 2001 to 272 in April 2005. This represents an increase in number of requirements from 12 in April 2001 to 27 in April 2005.

Table 6.3: Retailer Requirements

No. of Requirements	Ranking (1 st Highest)	Date
27	272	Apr 05
23	283	Apr 04
21	284	Apr 03
20	285	Apr 02
12	373	Apr 01

Source: Focus Property Intelligence, September 2005

- 6.9 Table 6.4 provides a more detailed picture of the requirements for Hove Town Centre. This set of figures was published in September 2005, and therefore gives a more recent picture than Table 6.3, above. It is evident that retailer requirements have risen between April 2005 and September 2005. The Focus property Intelligence database identifies 34 requirements in September 2005, including 18 comparison, 13 Service and 3 convenience goods retailers. In total these operators require between 11,139 sq m gross and 17,242 sq m gross of retail floorspace. The full breakdown is attached in Appendix 4.

Table 6.4: Hove Town Centre Requirements

Retail Category	No. of Units	Min. Floorspace sq m gross	Max. Floorspace sq m gross
Comparison	18	6,231	11,197
Convenience	3	1,907	2,223
Service	13	3,002	3,822
Miscellaneous	0	0	0
TOTAL	34	11,139	17,242

Source: Focus Property Intelligence, September 2005

- 6.10 The requirements include a range of mid market comparison retailers including high street multiples such as TK Maxx, Peacocks, Carphone Warehouse, Edinburgh Woollen Mill and Robert Dyas. Velvet, an A1 gift shop, has now obtained a unit in Hove adding to the quality of the retail offer.

- 6.11 Focus identifies 3 convenience retailer requirements from Aldi, Farmfoods and a newsagent, these retailers are at the lower budget end of the market. Foodstore requirements should be treated with caution, as some food operators do not register requirements on publicly accessible databases due to the strong market competition for development sites, although there is unlikely to be a current requirement from a major foodstore operator due to the recent investment by Tesco.
- 6.12 Focus also identifies 13 retailer requirements from service operators including 2 café/ restaurants and 4 fast food/ takeaways. Retailers with requirements include Ask and Costa and these would strengthen the quality of eating and drinking provision in Hove still further.

SHOPPING RENTS

- 6.13 The level of rent which retailers are prepared to pay for retail space within a centre is an indication of the perceived strength of that centre (although other factors such as the availability of floorspace have an impact on rental value). Table 6.5 outlines Prime Zone A retail rents in Hove and competing centres.

Table 6.5: Comparison of Prime Retail Rents (£ per sq m)

	Rents £ p/sq m				
	'00	'01	'02	'03	'04
Brighton City Centre	1938	1615	1776	1776	1830
London Road	-	-	-	377	431
<i>Hove</i>	431	538	538	538	592
Crawley	1292	1238	1238	1399	1399
Eastbourne	1023	969	1023	1023	1076

Source: Colliers CRE June 2004

- 6.14 Rents in Hove currently stand at £592 per sq m, the highest level since 2000. Rents have increased since 2003 after remaining at £538 per sq m from 2001 to 2003. These are consistently higher than rents in London Road, which is at the same level in the retail hierarchy.

COMMERCIAL YIELDS

- 6.15 Table 6.6 compares prime retail yields in Hove and its competing centres. Again, Hove's yields have remained steady in recent years and compare favourably to London Road but yields are far higher than those of Brighton City Centre.

Table 6.6: Comparison of Prime Retail Yields (%)

	% Yield				
	Oct '00	Oct '01	Oct '02	Apr '03	Jan '04
Brighton City Centre	5.50	5.00	5.25	5.25	5.25
London Road	10.00	9.00	>10	>10	>10
<i>Hove</i>	9.00	9.00	8.50	8.50	8.50
Crawley	5.50	5.50	5.50	5.50	5.50
Eastbourne	6.50	6.00	6.00	6.00	6.00

Source: Property Market Report 2004

VACANT RETAIL PROPERTY

- 6.16 Table 6.7 indicates that there are currently 23 vacant units in Hove, equating to a vacancy rate of 6.7%. This is well below the national average of 10.10%. In terms of retail floorspace, 4.9% of floorspace in Hove is vacant compared to a national average of 8%. The vacant units are distributed fairly evenly through out the centre and are split fairly evenly with between the frontages with 9 in the primary shopping frontage and 14 in the secondary frontage. George Street has only 3 vacant units.

Table 6.7: Vacancy Rates

Vacant Units	% of Total Units	National Average (%)	Vacant Floorspace (sq m)	% of Total Floorspace	National Average (%)
23	6.69	10.10	1,992	4.86	8.03

Source: Brighton & Hove City Council and GVA Grimley On-site Survey September 2005

ACCESSIBILITY

- 6.17 Hove benefits from good road and public transport accessibility. The centre lies on a main road between Brighton and Portslade enabling good east/west accessibility. Hove is served by 12 bus routes which serve either Blatchington Road or Church Road. The train Station at the top of Goldstone Villas links to Brighton to the east, along the coast to the west towards Worthing and beyond and also runs directly to London Victoria.
- 6.18 Hove has 3 car parks (Table 6.8). The largest is for Tesco customers only (otherwise there is a charge of £25 per hour). Access from the car parks to the primary shopping area is satisfactory although visual permeability from the car park is poor. The pedestrianisation of George Street ensures a safe and pleasant shopping experience. Blatchington and Church Roads have fairly heavy traffic flows which disrupt pedestrian movements, especially along Blatchington Road which has cars parked along both sides of the street.

Table 6.8: Car Parks

Location	Number of Spaces
Norton Rd Multi Storey	400
Tesco (for Tesco customers only)	586
Haddington Street	33
Total	1,019

Source: Experian Goad & IGD

ENVIRONMENTAL QUALITY

- 6.19 George Street is an attractive shopping area which has high quality street furniture, paving materials and planting. Much of George street is lined with cafes with outside seating which gives the centre a bustling and friendly feel throughout the whole day. Shop frontages are fairly mixed and generally well maintained.
- 6.20 Blatchington Road is more tired and run down and the high traffic flow and large number of cars parked on the street detract from the overall shopping environment. Frontages on Blatchington Road are particularly run down and require investment, especially Iceland and Co-op foodstores which at the time of survey had the upper windows boarded up and covered with advertising posters.

PROPOSALS/COMMITMENTS

- 6.21 There are currently no proposals or commitments for major new retail floorspace in Hove.

SUMMARY

- 6.22 Hove appears to be healthy and a number of vitality and viability indicators show signs that Hove is performing its role well as a town centre. Hove has a very strong service sector with a good number of estate agents, banks, restaurants and cafes. The low vacancy rates and strong retailer demand suggest that Hove will maintain this role, over the forthcoming LDF period.
- 6.23 There are however, some signs of weakness in the centre. Blatchington Road has seen little investment by retailers in their stores and they are looking tired and dated, particularly the Co-op and Iceland Foodstores. There has also been little investment made in terms of the urban environment on Blatchington Road.

7. LONDON ROAD TOWN CENTRE: QUALITATIVE ASSESSMENT

7.1 London Road is a linear shopping centre which lies to the north of Brighton City Centre near the North Laine. London Road was the original main road into Brighton but due to the one way system the area is now bypassed on the way into Brighton although it is still the main road out of town.

DIVERSITY OF USES

7.2 London Road has a total of 238 retail and service units and the Experian Goad town centre report identifies a total of 37,758 sq m of ground floor floorspace. It should be noted that the floorspace figures derived from Brighton City Council only show the footprint of units, within the building lines, and do not provide a definitive figure of net or gross floorspace. It should also be noted that London Road's only department store, Co-op, has 4 floors of retail. Table 7.1 highlights the composition of London Road by the number of units.

Table 7.1: London Road Composition by Number of Units

Retail Trade Group	Outlets Number	%	% GB	Variant %
Convenience	18	7.56	9.14	-1.58
Comparison	89	37.39	47.64	-10.25
Service	78	32.77	31.75	+1.02
Vacant	35	14.7	10.10	+4.6
Miscellaneous	18	7.56	1.37	+6.19

Source: Brighton & Hove City Council and GVA Grimley On-site Survey September 2005

Note: Miscellaneous: Employment, careers and Post Offices

Table 7.2: London Road Composition by Retail Floorspace

Retail Trade Group	Floorspace Sq m Gross	Floorspace Sq m Net	% of Total Net Floorspace	% GB	Variant %
Convenience	11,664	4,750	19%	17%	+2%
Comparison	16,704	9,740	39%	53%	-14%
Service	8,102	4,874	20%	21%	-1%
Vacant	3,844	2,099	8%	8%	0%
Miscellaneous	8,625	3,400	14%	1%	+13%
TOTAL	48,939	24,863	100%	100%	

Source: Brighton & Hove City Council and GVA Grimley On-site Survey September 2005

Note: Miscellaneous: Employment, careers and Post Offices

- 7.3 The centre has a below average representation of retailers in the comparison goods categories, at 10.25% below the national average respectively. Of the comparison offer available 9% of these units are in the electrical and home entertainment category (e.g. Richer Sounds, Audio T and Maplins) which is almost double the national average. There is a particularly low proportion of clothing and footwear stores. The high number of specialist electrical stores give London Road some specialism although this would need to be enhanced if it were to fully develop a niche market.
- 7.4 Although in terms of number of units there appears to be a poor representation of convenience retailers, in terms of floorspace the percentage is actually slightly above national average. This reflects the fact that London Road has four supermarkets as well as the strong local convenience role of the Open Market. Service provision is broadly in line with the national average, although 16% of units are fast food compared to a national average of 13%.

RETAILER REPRESENTATION

- 7.5 In January 2005, multiple retailers occupied 62 of the 238 units in London Road (26%), which is lower than the national average of 34%. Experian Goad highlight 27 key attractors as a benchmark to judge centres against, and it is evident from our analysis that London Road has just 4 of these retailers. These are Boots, Sainsbury's, Superdrug and Woolworths. This is a weak representation of key quality attractors.
- 7.6 The primary shopping frontage on London Road runs from the junction with Cheapside where Sainsbury's is situated up to Preston Circus, as shown on Plan 14. The retailers in London Road are generally at the mid range and discount end of the market such as Peacocks and Poundstretcher and there are also a large number of charity shops.
- 7.7 The Co-Op department store is one of the key anchor retailers on London Road. It is the last and largest old-style department store in the city, and will close a century after it first opened its doors in 1906. The original store gradually expanded over the years into several other buildings, and the supermarket opened in 1962. In the past, the Co-op was a significant draw to the centre but the is now made up of individual retailers including a travel agent and Sussex Lighting. Top Shop vacated the store in 2003 leaving a lower order comparison goods provision. The closure of the store will have significant implications for the overall retail function on London Road, and is discussed further in Section 10.
- 7.8 Although not in the defined shopping area, the Duke of York Picturehouse lies at the northern end of London Road and does draw people to the area, but this appears to have little impact on the retail area. London Road has a good range of supermarket provision with a Sainsbury's, Somerfield, Iceland and Co-op. However, these stores are all dated with no evidence of recent investment. The existing Sainsbury's store will close in the near future, following construction of new food superstore (4,180 sq m gross) on the Station site, behind London Road. Given existing representation it is unlikely that a new food retailer would wish to occupy the existing Sainsbury's store, although a

retailer has potentially been identified to occupy the unit. Investment in linkages with the Brighton Station site, and improvements in the environmental quality of the centre will be important in ensuring investor interest in this site.

- 7.9 Somerfield and Iceland will be the only remaining foodstore anchors on London Road. A key draw and asset to the area is the open market, which sells fresh fruit, vegetables, fish and meat.

SHOPPING RENTS

- 7.10 Table 7.2 outlines the Prime Zone A retail rents in London Road and surrounding centres. Within Brighton & Hove and surrounding centres, London Road has the lowest rents since they have been recorded in 2003. They have shown some growth between 2003 and 2004 and currently stand at £431 per sq m. Rents are considerably lower than Hove, despite having the same retail hierarchy designation.

Table 7.2: Comparison of Prime Retail Rents (£ per sq m)

	Rents £ p/sq				
	'00	'01	'02	'03	'04
Brighton City Centre	1938	1615	1776	1776	1830
<i>London Road</i>	-	-	-	377	431
Hove	431	538	538	538	592
Crawley	1292	1238	1238	1399	1399
Eastbourne	1023	969	1023	1023	1076

Source: Colliers CRE June 2004

COMMERCIAL YIELDS

- 7.11 Table 7.3 compares prime yields in Brighton & Hove and surrounding centres. London Road has the highest (or poorest) yield, which have been over 10% since 2003. Again, London Road performs unfavourably compared to Hove which has seen yields decrease (improve) since 2001. Since 2002 locations with a yield of over 10% are not considered of major interest in terms of retail property investment, and are not therefore included in the Property Market Reports.

Table 7.3: Comparison of Prime Retail Yields (%)

	% Yield				
	Oct '00	Oct '01	Oct '02	Apr '03	Jan '04
Brighton City Centre	5.50	5.00	5.25	5.25	5.25
<i>London Road</i>	<i>10.00</i>	<i>9.00</i>	<i>>10</i>	<i>>10</i>	<i>>10</i>
Hove	9.00	9.00	8.50	8.50	8.50
Crawley	5.50	5.50	5.50	5.50	5.50
Eastbourne	6.50	6.00	6.00	6.00	6.00

Source: Property Market Report 2004

VACANT RETAIL PROPERTY

- 7.12 Table 7.4 Indicates that there are 35 vacant units on London Road, equating to a vacancy rate of 14.7%, which is above the national average. A high proportion of the vacant units are clustered along the secondary shopping area of York Place, although these units are currently being converted to residential flats.

Table 7.4: Vacancy Rates

Vacant Units	% of Total Units	National Average (%)	Vacant Floorspace (sq m)	% of Total Floorspace	National Average (%)
35	14.7	10.10	3,844	9.5	8.03

Source: Brighton & Hove City Council and GVA Grimley On-site Survey September 2005

ACCESSIBILITY

- 7.13 London Road benefits from good access to the main road network acting as the main road leading to the north out of Brighton. The one way system can make the centre difficult to navigate and access to car parks is poor. The centre does have a multi storey car park, but in an opinion survey undertaken by URBED in 2001, 20% of householders and 35% of traders said that improving the access to the London Road car park would make the area more successful. The survey also highlighted that 75% of traders and 23% of households would like short term parking on London Road to be easier.
- 7.14 Accessibility to London Road will be affected by the New England Quarter development which began construction in June 2004. The limitations of the car park have been acknowledged, and a legal agreement has since secured improvements to London Road car park. These will include new parking control exit and entry system and ticket machines and barriers; reversal of the flow into and

out of the car park; refurbishment of the existing lift; redecoration of the existing staircase; relocation of existing CCTV; and new car park markings.

Table 7.5: Car Parks

Location	Number of Spaces
Oxford Court	36
London Rd	528
Total	564

Source: Experian Goad

- 7.15 London Road is well served by public transport. London Road train station has trains to Brighton and Lewes. The centre is served by 23 bus routes with stops outside the four supermarkets and the open market and these serve much of the outskirts of the City.
- 7.16 The New England Quarter development will also result in improvements to public transport with improved bus stops and real-time bus information signs. There will also be linkage improvement works to improve pedestrian footfall between the Brighton Station Site and London Road. Improvement areas include Anne Street, Cheapside and York Hill and will include new street furniture and an upgrade in paving materials.

ENVIRONMENTAL QUALITY

- 7.17 The environmental quality of the area is greatly affected by traffic movements through the centre. Traffic flow is heavy, with ongoing congestion from the southern end of London Road up to Preston Circus, and at peak times traffic jams can run as far south as Old Steine. To tackle this, the council has designated Lewes Road and parts of London Road as an Air Quality Management Area.
- 7.18 The appearance of London Road is generally run down. Paving and street furniture is of poor quality and there is no soft landscaping. Retail frontages are very mixed and although much of the area appears run down units such as Superdrug and Natwest have recently invested in improving their frontages. The pedestrian experience is poor with pavements getting very crowded around the bus stops and outside Sainsbury's and the street is used as a thoroughfare or a place to wait for the bus than for somewhere to stay and enjoy the shopping experience.
- 7.19 The centre can feel unsafe in the daytime and the evening, a number of beggars can give the area a threatening environment although this is mostly around the southern end of the London Road area along York Place. In acknowledgement of the environmental issues on London Road, the Council is commissioning a number of studies to investigate potential improvements that could be made to the London Road/ Lewes Road corridors.

PROPOSALS/COMMITMENTS

- 7.20 The key commitment adjoining London Road at present is the development of the Brighton Station Site. A Masterplan for the regeneration of this 8ha site in Brighton city centre was approved by Brighton & Hove City Council in September 2003. The entire proposal is for a mixed use scheme including 355 residential units, a new Sainsbury's foodstore, a training centre, two hotels, a new car park for the station, a new community facility, office and workspace, and a language school. Development commenced on the site in July 2004, and while it will regenerate and improve a key central brownfield site, the linkages and knock-on benefits for London Road have yet to be fully realised.

SUMMARY

- 7.21 London Road is not performing well as a town centre and is showing signs of continuing decline in a number of vitality and viability indicators. Rents are the lowest within the city and yields are very high indicating a lack of confidence in terms of property investment returns in the area. This is also reflected in the high vacancy rates in the centre.
- 7.22 At present there is good convenience provision with a Sainsbury's, Somerfield, Iceland and Co-op, although the supermarkets have received little recent investment and Sainsbury's and Co-op are closing down. London Road does have a good provision of electrical and home entertainment stores with Richer Sounds, Audio T and Maplins amongst others, but compared to Hove, does not appear to be performing in line with its intended role as a Town Centre.

8. DISTRICT/LOCAL CENTRES: QUALITATIVE ASSESSMENT

- 8.1 In this section, we provide a qualitative assessment of Boundary Road/Station Road, Brighton Marina, Lewes Road and St James's Street, which are all defined as District Centres in the adopted Brighton & Hove Local Plan (July 2005). In the latter part of the Section, Brighton and Hove's defined Local Centres are also briefly assessed.
- 8.2 In accordance with PPS6, the adopted Local Plan states that District Centres commonly serve community needs for both comparison and convenience goods shopping, together with a range of non-retail services such as banks, building societies, cafes and restaurants. The centres should be capable of fulfilling an important function as a focus for both the community and for public transport.
- 8.3 It is acknowledged, however, that they have suffered over the past decade from economic downturns and increased competition from out of centre retailing, and a more flexible approach is needed to ensure that their vitality and viability is maintained and enhanced. In particular, policy states that there should still be a predominance of at least 50% of retail (Class A1) units retained in each district centre.
- 8.4 The District Centres are the principal shopping centres outside Brighton City Centre, and Hove and London Road town centres, and are smaller in scale with little standard published performance data available. These health checks draw largely on detailed street audits undertaken by Brighton & Hove City Council and GVA Grimley on-site surveys carried out during September 2005. For each centre we consider the following:
- i) Location, physical characteristics and layout of each centre;
 - ii) The retail composition of the centre;
 - iii) The range of uses, including vacancy rates;
 - iv) The key retailers;
 - v) The environment, including any key features;
 - vi) The centre's accessibility/level and quality of car parking.

BOUNDARY ROAD/STATION ROAD

- 8.5 Boundary Road/Station Road District Centre is located to the west of Hove town centre, in Portslade, close to the outer boundary of the local authority area. It is a linear district centre stretching along Boundary Road and intersected by the railway line and New Church Road. Most retailers occupy purpose built retail units that are generally inconsistent in style and size, and the centre as a whole

lacks any particular architectural/historic style. The district centre does not fall within any wider policy area, such as a conservation area.

- 8.6 Brighton & Hove City Council undertook a detailed on-site survey and centre audit in the district centre in 2005, and GVA Grimley undertook a detailed site visit in September 2005. The full centre audit is attached in Appendix 2, and the summary is highlighted here in Table 8.1 and 8.2. The district centre is the largest in Brighton & Hove in terms of the number of units (165) and retail floorspace. We consider the number and variety of shops on Boundary Road caters largely for 'every day' requirements, but lacks the quality and choice of goods available elsewhere in other higher order centres.

Table 8.1: Retail Composition by Number of Units, Boundary Rd/Station Rd District Centre

Retail Category	No. of Outlets	% of Total
Comparison	73	44
Convenience	12	7
Service	53	32
Vacant	16	10
Miscellaneous	11	7
TOTAL	165	100

Source: Brighton & Hove City Council, 2005 and GVA Grimley, September 2005

Note: Excludes Residential

Note: Miscellaneous: Employment, careers and Post Offices

Table 8.2: Retail Composition by Retail Floorspace, Boundary Rd/Station Rd District Centre

Retail Category	Gross Floorspace sq m gross	Net Floorspace sq m net	Net Floorspace as % of Total
Comparison	8,935	5,361	41
Convenience	4,985	2,435	19
Service	5,359	3,217	24
Vacant	1,502	902	7
Miscellaneous	2,052	1,231	9
TOTAL	22,833	13,146	100

Source: Brighton & Hove City Council, 2005 and GVA Grimley, September 2005

Note: Excludes Residential

Note: Miscellaneous: Employment, careers and Post Offices

- 8.7 The district centre has 12 convenience goods outlets, anchored by Tesco Metro which appeared busy on the day of the site visit (Friday), and a Budgens foodstore. Both foodstores are located in the prime retail frontage, and Tesco has a store car park. An Aldi store is also under construction at the northern end of Boundary Rd/Station Rd. Main foodstore provision is supplemented by a number of

- smaller, specialist retailers including a butchers, greengrocers, health food shop, bakery, three newsagents and two off licences.
- 8.8 Comparison retailers account for the largest proportion (44%) of units in the District Centre, largely dominated by smaller independent retailers. The range of multiple retailers includes representation from Boots the Chemist, Woolworths, Superdrug and Peacocks ladies clothing – all located in small sub-standard units within the prime retail frontage. Independent retailers offer a reasonably good range of goods including furniture/household, electrical, DIY, florists, hairdressers, and pet supplies, but appear to target the more budget market, and lack the quality of specialist retailers represented in other centres. The centre has two pawnbrokers and five charity shops.
- 8.9 Service businesses account for 32% of units in the centre, but the choice is limited with a number of businesses repeated throughout the centre. These include banks, building societies, estate agents, travel agents and hairdressers. The centre also has a betting office and a number of fast food take-aways, but a limited restaurant offer reflecting weaknesses in the quality of the evening economy. Miscellaneous categories include a Post Office and a number of public houses.
- 8.10 Historically, Boundary Road/Station Road has the highest vacancy rate compared to other district centres in Brighton & Hove, comprising at present circa 1,502 sq m gross (902 sq m net) of floorspace within 16 units. Vacant units appear to be concentrated south of New Church Road in the secondary retail frontage. This reflects lack of demand from retailers to locate in the centre, and the focus of the centre to the north of New Church Road towards the primary retail frontage, Tesco Metro, Boots the Chemist and other multiple retailers, the banks and the railway station and main bus terminus.
- 8.11 Boundary Road/Station Road is served by a number of bus routes. Service No.1 serves the secondary shopping area to the south of New Church Road and the No. 20 drops off at the south of the district centre and continues on towards Brighton City Centre. Most bus services, however, (2, 6, 46, 49 and 66) serve the north of the district centre and the train station, supporting pedestrian footfall in the prime retail area.
- 8.12 Likewise, the train station (with trains running directly to London Victoria) is located to the far north of the centre, again supporting pedestrian activity in the northern shopping area and prime retail frontage. A subway aids pedestrian movement across the railway line when the level crossing is down, but does not have ramp access.
- 8.13 Boundary Road is a particularly busy traffic through route and the railway line often causes considerable congestion when the level crossing temporarily stops traffic. On-street parking with few restrictions is available on both sides of the road throughout the whole centre making stopping to use the shops relatively easy. Heavy vehicular movement and parking detracts from the pedestrian environment and pedestrian flows around the centre, although there are four pedestrian crossing points.

- 8.14 Pedestrian flows appeared strong on the day of the site visit (Friday and sunny), particularly in the northern part of the centre within the primary retail area, reflecting the popularity of the centre, which is consistent with monitoring undertaken by Brighton & Hove City Council. Footfall was considerably lower to the south of New Church Road in the secondary retail area. The environmental quality of the centre could be improved, particularly shop frontages and fascias which appear run down and poorly maintained.
- 8.15 Overall, we consider the district centre provides a number of essential every day services including banks, building societies, hairdressers and a post office, but the quality and choice of retailer is limited and targeted towards a more budget market. It is evident from site visits and monitoring that the centre provides a popular shopping destination for the local catchment as well as being a popular destination for a large pool of local workers (eg, EDF Energy), but attracts few people from further afield.
- 8.16 Our assessment has highlighted certain vulnerabilities of the centre as a shopping destination, particularly south of New Church Road in the secondary shopping area, although at present the centre appears to be popular with shoppers despite the poor quality environment. Tesco Metro and other multiple retailers such as Woolworths and Boots the Chemist are crucial to maintain the vitality/viability and attraction of the centre over the forthcoming LDF period, although budget/independent retailers do provide a strong pull for the local catchment. The new Aldi store will help to anchor the north of the centre.

BRIGHTON MARINA

- 8.17 Located to the east of Brighton City Centre at the base of the cliffs, Brighton Marina District Centre falls within an area of development generally known as 'The Marina'. It is unique amongst Brighton & Hove's district centres, with an entirely different character and built form.
- 8.18 An Urban Design Analysis and Development Brief was adopted in January 2003 in the form of a Supplementary Planning Guidance Note (SPG) for development control purposes. The SPG covers the western half of Brighton Marina, which includes the leisure area, Asda Superstore and the 'Black Rock' site identified for development in the Brighton & Hove Local Plan.
- 8.19 It is evident from the SPG that the fortunes of the Marina have fluctuated. Following the opening of the Marina in 1979, difficult economic conditions prevailed and in 1985 it was bought by Brent Walker who built the superstore and the 'Marina Village' comprising shops, leisure and residential uses. The firm went into administration in the early 1990s, following which piecemeal development of further flats and leisure uses have taken place by successive owners.
- 8.20 The designation of the District Centre is largely historic and does not include key elements of the Marina's evolution, namely the leisure uses, cinema, health & fitness, and casino; the Asda car park; the Waterfront development; and Black Rock, which is being promoted for recreation. Together

these elements constitute the wider District Centre and draws visitors from a 'wider than District Centre catchment'. In considering the waterfront development and adjoining uses at the Marina as part of the wider district centre, the local authority will consider any proposal for new retail development against the criteria set out in adopted Local Plan policy SR1, relating to new development within or on the edge of existing defined shopping centres.

- 8.21 Brighton & Hove City Council undertook a detailed on-site survey and centre audit in the district centre in 2005, and GVA Grimley undertook a detailed site visit in September 2005. The full district centre audit is attached in Appendix 2, and the summary is highlighted here in Table 8.3 and 8.4. It is evident that the district centre is the smallest in Brighton & Hove in terms of the number of units but is similar in floorspace to Lewes Road and St James's due to the large Asda food superstore.

Table 8.3: Retail Composition by Number of Unit, Brighton Marina District Centre

Retail Category	No. of Outlets	% of Total
Comparison	12	45
Convenience	1	4
Service	10	37
Vacant	2	7
Miscellaneous	2	7
TOTAL	27	100

Source: Brighton & Hove City Council, 2005

Note: Excludes Residential
Within defined District Centre Boundary
Miscellaneous: Employment, careers and Post Offices

Table 8.4: Retail Composition by Retail Floorspace, Brighton Marina District Centre

Retail Category	Gross Floorspace sq m gross	Net Floorspace sq m net	Net Floorspace as % of Total
Comparison	3,109	1,866	26
Convenience	8,294	3,966	55
Service	1,989	1,193	16
Vacant	167	101	1
Miscellaneous	392	181	2
TOTAL	13,951	7,307	100

Source: Brighton & Hove City Council, 2005

Note: Excludes Residential
Within defined District Centre Boundary
Miscellaneous: Employment, careers and Post Offices

- 8.22 It is evident from our research that shopping facilities in the district centre are significantly more limited than alternative district centres in Brighton & Hove. Comparison retailer's account for 45% of

- retail units in the designated district centre, comprising a limited choice of goods compared to 'traditional' district centres. Retailers include a golf shop, skateboard shop and accessories, Reebok sportswear, luggage, picture framing and some clothing.
- 8.23 Asda food superstore is the only convenience goods retailer in the district centre, and in terms of scale is significantly larger than foodstores in district centres elsewhere in Brighton & Hove. It is evident from the results of the Household Telephone Survey that the 24-hour store functions as a main food shopping destination and the catchment area is not confined to the local population at the Marina. The store opened in 1987 and has a retail floorspace of 8,294 sq m gross (3,966 sq m net).
- 8.24 A store refurbishment in summer 2005 included the addition of a mezzanine floor area now used for an Asda George clothing range. The store sells a wide variety of convenience goods including a delicatessen, fish, meat and bakery counters, and a hot food takeaway. In terms of non food goods, the store sells cards, stationery and gifts and music and films. Additional facilities include a petrol station and a pharmacy. The store appeared busy on the day of the site visit (Friday) and while the adjoining surface car park is relatively small for a store of this size shoppers do use the nearby multi-storey car park.
- 8.25 Service operators comprise 37% of retail units in the district centre, although the choice is particularly limited comprising two estate agents, and a number of public houses and restaurants. The district centre is not fulfilling its role defined in national and local policy to provide a range of non-retail services, such as banks and building societies. The local population is forced to travel to alternative destinations beyond The Marina that meet their everyday service requirements. In particular, the district centre does not have a bank, building society, Post Office, hairdresser, or laundrette/dry cleaner.
- 8.26 At present, the district centre has only two vacant units, which is low compared to previous years recorded by Brighton & Hove City Council. It is evident from monitoring reports and our site visit that retailer stability is poor in the district centre, leading to units becoming vacant on a regular basis.
- 8.27 Unit shops in the district centre are located within The Octagon, an inward facing pedestrian square adjoining the Asda foodstore. The scheme is small in scale and fascias are largely hidden from visitors to The Marina discouraging pedestrian footfall. Units are small and oddly configured around the Octagon shape and waterfront, and the quality and choice of retail goods is insufficient to draw large numbers of pedestrians to this area. Asda is well used by those travelling by car, although Council monitoring has observed that frequently these trips are limited solely to the store itself, with few linked trips to the wider District Centre.
- 8.28 Looking beyond The Octagon to the newer provision of retailer and other units in The Waterfront development, the composition of retailers is largely focused on fashion and leisure wear, with a smaller element of homewares. Whilst this adds to the volume of retail floorspace, albeit outside the defined district centre boundary, it does not contribute in terms of any of the traditional elements

- expected of a district centre. Units facing the marina itself are anchored by the Seattle Hotel and comprise A3 occupiers including Pizza Express, Café Rouge, Ma Potters and Frankie & Benny's. These add to the attraction and critical mass of the Marina as a leisure destination.
- 8.29 The physical appearance and the quality of the buildings, paving and landscaping in the defined district centre are generally good, with lighting and seating throughout. Raised flowerbeds, trees and hanging baskets add to the appearance of the centre. Investment in the Waterfront development has helped to improve the environmental quality of the Marina as a whole, although there are bleak, uninteresting areas including the car parks and 'leisure boxes'.
- 8.30 Brighton Marina is served by a number of bus routes. It is clear, however, that routes 7 and 21 provide the only regular daily services. Alternative bus routes are infrequent and many only run on a Sunday. There is no train station, but the centre has a large free multi storey car park to service the retail and leisure facilities.
- 8.31 The main access into the Marina is by road, and pedestrian movement from beyond is extremely restricted, although within The Marina pedestrians are able to move relatively easily. A number of traffic calming measures have been introduced including widened pavements, pedestrianised areas, zebra crossings, traffic islands and reduced speed limits.
- 8.32 Overall, we consider the District Centre is not currently performing in line with its intended role with limited shopping and service facilities. The Asda foodstore provides a good main food shopping destination, but every day services for the local residents are not available.
- 8.33 Taking the Marina as a whole, including the designated District Centre, Volume 1 of the SPG identifies the strengths, weaknesses, opportunities and threats inherent in the existing development. Volume 2 seeks to examine the identified potential for change and to provide a framework and Urban Design Analysis within which this change can occur. Volume 1 concluded that the area is seriously deficient environmentally, visually, functionally and economically and is need of a process of regeneration which will involve new development and the refurbishment of existing buildings and spaces.
- 8.34 It is emphasised that whilst the Waterfront will assist in helping to create critical mass and additional local choice, substantial further investment, development and improvement is clearly necessary if the Marina is to become a sustainable, successful place in which to live, work, shop and relax. The analysis concluded that "the subject area at The Marina fails, comprehensively, to match the potential of its fantastic location".
- 8.35 A Vision was subsequently established in order to set out what can be achieved in the Masterplan for Enhancement: -

“To enhance the Marina environmentally, visually, functionally and commercially and to transform it into an exhilarating, sustainable location of international quality and renown.”

LEWES ROAD

- 8.36 Lewes Road District Centre is located to the north east of Brighton City Centre on the edge of the Central Area defined on the local authority proposals map. It is a linear, elongated district centre stretching from Park Crescent/The Level in the south to Bear Road/Hollingdean Road and Saunders Recreation Ground in the north. The district centre is surrounded by dense residential development, with a high proportion of student accommodation, and Lewes Road forms an academic corridor to the University buildings both north and south of the centre.
- 8.37 Lewes Road (A270) is a busy main arterial road leading in and out of Brighton & Hove, serving the A27 to the north. Secondary retail frontages are located in the far north and south of the centre, and the prime retail frontage is intersected at a number of intervals by residential streets. Retail units comprise relatively dated and run down two storey buildings with offices/storage on the upper floors. The district centre does not fall within any wider policy area, such as a conservation area, and the centre as a whole lacks any architectural significance.
- 8.38 Brighton & Hove City Council undertook a detailed on-site survey and centre audit in the district centre in 2005, and GVA Grimley undertook a detailed site visit in September 2005. The full centre audit is attached in Appendix 2, and the summary is highlighted here in Table 8.5 and 8.6. Lewes Road district centre is the third largest district centre in Brighton & Hove after Boundary Road/Station Road and St James’s Street, in terms of the number of units.

Table 8.5: Retail Composition by Number of Unit, Lewes Road District Centre

Retail Category	No. of Outlets	% of Total
Comparison	19	21
Convenience	7	8
Service	36	39
Vacant	13	14
Miscellaneous	17	18
TOTAL	92	100

Source: Brighton & Hove City Council, 2005

Note: Excludes Residential

Note: Miscellaneous: Employment, careers and Post Offices

Table 8.6: Retail Composition by Retail Floorspace, Lewes Road District Centre

Retail Category	Gross Floorspace sq m gross	Net Floorspace sq m net	Net Floorspace as % of Total
Comparison	2,187	1,311	14
Convenience	6,583	3,514	39
Service	2,687	1,612	18
Vacant	1,414	848	9
Miscellaneous	3,324	1,816	20
TOTAL	16,195	9,102	100

Source: Brighton & Hove City Council, 2005

Note: Excludes Residential

Note: Miscellaneous: Employment, careers and Post Offices

- 8.39 Service businesses account for the largest proportion (39%) of retail provision in the centre, highlighting the dominance of this category within the centre. There appears to be a good range of operators serving the local population including a range of hairdressers, estate agents, cafes/restaurants, fast food takeaways, and a bank and a pharmacy. Miscellaneous categories include a dentist, post office, two doctors, a betting office, car repair centre and a number of public houses.
- 8.40 Comparison retailers account for 21% of retail units, the lowest figure compared to other district centres in Brighton & Hove. Furniture Warehouse is the only comparison goods multiple retailer; while the remaining operators are independent and offer a limited range and quality of goods, targeted towards more specialist/niche segments of the market. Retailers include second hand furniture shops, hardware stores, a record shop, and units selling baby accessories, gifts and books. There is little comparison retail offer to attract shoppers for a 'general' shopping trip, and people are more likely to make an informed special trip here for specific goods.
- 8.41 Convenience retailers account for 8% of retail units in the centre. Sainsbury's anchors the district centre to the north at Vogue Gyrotory. The store opened in 1985 and has a retail floorspace of approximately 5,601 sq m gross (2,925 sq m net). It has a good range of convenience goods including a fish and meat counter and a delicatessen, but there are no non-food products on offer. The store has a two storey car park and Starbucks coffee shop. It is evident from the Household Telephone Survey that the store plays a main food shopping role for a wider catchment area as well as a local walk-in shopping destination.
- 8.42 The Sainsbury's store is supplemented with Spar and Co-op supermarkets providing a more local top-up shopping function, but there are no independent bakers, butchers or greengrocers enhancing the quality of foodstore provision in the centre. There are three off licences including the multiple retailers Unwins and Threshers. The centre has 13 vacant units, which appears to be a substantial jump compared to recent years monitored by the council, and is the highest proportion (14%) compared to other district centres in Brighton & Hove.

- 8.43 Lewes Road is served by three regular bus services, running until approximately midnight throughout the week. Each bus route travels the full length of Lewes Road serving both the prime and secondary retail frontages. There is no train station although Moulsecomb Station is a short walk to the north.
- 8.44 Vehicular traffic on Lewes Road is heavy and often causes congestion around the Vogue Gyratory. Pedestrian flows around the centre are challenged by the busy main road, limited pedestrian crossing points, and intersecting residential streets between retail units. The pedestrian environment is particularly poor in the north of the centre towards the secondary shopping area, due to the Vogue Gyratory. Overall, high traffic volumes and pollution hinder the pedestrian environment, and it is evident from Council monitoring that, despite a strong residential catchment area, there is a lighter flow of pedestrians than observed in other district centres.
- 8.45 Overall, we consider the district centre provides a number of essential everyday services including a bank, pharmacy, hairdressers, post office, dentist and doctors surgery. The centre also has a good anchor foodstore and supplementary Co-Op and Spar top-up shops. The comparison retail offer is, however, weak and few people are likely to be attracted to travel to the centre for this type of shopping.
- 8.46 Lewes Road acts as a key radial route in and out of Brighton, and is also the focus of other major trip-generators, such as the University and Pavilion Retail Park. As such, the environment is hampered by heavy vehicular traffic and congestion, particularly around the Vogue Gyratory, and pedestrian movement around the centre is consequently restricted. Retail units appear run-down and there is little evidence of investment by retailers in their shop frontages, although council monitoring has recently identified a number of shops undergoing refurbishment. Pedestrian flows are low compared to other district centres, reflecting the weaker role the centre plays as a shopping destination.

ST JAMES'S STREET

- 8.47 St James's Street is an historic traditional linear district centre. It is located adjacent to Brighton City Centre, stretching eastwards, parallel to the seafront. St James's Street provides an attractive shopping environment, with a wide range of specialist retailers occupying small scale units with plenty of character. The primary retail frontage runs from Old Steine in the west to New Steine/Devonshire Place in the east. Secondary retail frontages include units on George Street and on St James's Street between New Steine/Devonshire Place and Rock Gardens.
- 8.48 Brighton & Hove City Council undertook a detailed on-site survey and centre audit in the district centre in 2005, and GVA Grimley undertook a detailed site visit in September 2005. The full centre audit is attached in Appendix 2 and the summary is highlighted here in Table 8.7 and 8.8. St James's Street is the second largest district centre in Brighton & Hove in terms of the number of units and net retail floorspace.

Table 8.7: Retail Composition by Number of Unit, St James's Street District Centre

Retail Category	No. of Outlets	% of Total
Comparison	46	35
Convenience	13	10
Service	52	40
Vacant	6	5
Miscellaneous	13	10
TOTAL	130	100

Source: Brighton & Hove City Council, 2005

Note: Excludes Residential

Note: Miscellaneous: Employment, careers and Post Offices

Table 8.8: Retail Composition by Retail Floorspace, St James's Street District Centre

Retail Category	Gross Floorspace sq m gross	Net Floorspace sq m net	Net Floorspace as % of Total
Comparison	4,467	2,657	30
Convenience	4,110	2,212	25
Service	4,002	2,394	28
Vacant	741	445	5
Miscellaneous	1,711	1,026	12
TOTAL	15,031	8,734	100

Source: Brighton & Hove City Council, 2005

Note: Excludes Residential

Note: Miscellaneous: Employment, careers and Post Offices

- 8.49 Service businesses account for 40% of units in the centre, with a large proportion of high quality A3 restaurants and cafes, and sandwich and juice bars. Additional services include hairdressers, dry cleaners, health & beauty, estate agents, fast food takeaways, a locksmith and a tattooist. The catchment population also benefits from a dentist, chiropodist, and an acupuncturist. There appears to be a good range of service uses, although shoppers have to travel further afield into Brighton City Centre to access a post office, bank and other financial institutions.
- 8.50 Comparison retailers occupy 35% of retail units in the district centre, largely comprising independent businesses. Multiple retailers include Sussex Stationers, Age Concern, Superdrug, Boots, Interflora and Kodak Express. Independent retailers offer a broad range of specialist, niche goods including gift shops, florists, charity shops, bike shops, jewellers, books, clothes, art and household goods. The centre also has four pharmacies, an optician, photo processing shop, and a pet shop. It is evident from the audit that St James's Street offers a high quality niche retailing function.
- 8.51 The district centre has a strong convenience goods function with 10% of units occupied by convenience goods retailers. The centre is anchored by Somerfield, which initially opened in the

west of the centre as Safeway in 1985. Following the take-over of Safeway by Morrisons in 2004, and subsequent sale of a number of stores to Somerfield, the Safeway foodstore on St James's Street re-opened as Somerfield in 2004. The store has a retail floorspace of circa 2,907 sq m gross (1,542 sq m net), and it is evident from the household telephone survey that the store performs a 'top up' local shopping role.

- 8.52 In addition to the refurbished Somerfield foodstore, St James's Street has a good range of supplementary food retailers including a Co-Op foodstore to the east of the centre. In character with the centre, there is also a number of more specialist retailers including a delicatessen, fishmonger, greengrocer, bakery, newsagents and an off license. The district centre performs a strong convenience goods shopping destination for general goods and more specialist luxuries.
- 8.53 It is evident from the 2005 shop audit undertaken by Brighton & Hove City Council that St James's Street has the lowest vacancy rate compared to other district centres. At present, vacant units comprise only 5% of total units. These are spread relatively evenly along St James's Street, and there is one vacant unit on George Street in the secondary retail frontage.
- 8.54 The centre has a relatively vibrant evening economy. Both Somerfield and Co-op open late, as well as Unwins and a number of restaurants, pubs and café operators. In terms of footfall, it is evident from Council monitoring that the district centre experiences high volumes of pedestrian flow, particularly at its western end. Pedestrian flow is considerably lighter along the secondary shopping frontages of George Street and the eastern end of St James's Street.
- 8.55 In terms of accessibility, St James's Street is a one-way road eastbound from Old Steine. It has a narrow carriageway and pavements, and traffic sometimes hampers heavy flows of pedestrians at the western end. Due to the physical constraints of the centre, vehicles are required to travel slowly and carefully through the centre, and the environment is difficult for cyclists. A number of bus services travel along the narrow street, connecting the centre to a number of areas in Brighton & Hove. At the western end of St James's Street there are dedicated on-street car parking bays that allow shoppers to park for a maximum of one hour. Parking further east on St James's Street is restricted for residents only. On-street parking is supplemented by a public car park behind Somerfield, which appears to be sufficient to cater for parking requirements in the centre.
- 8.56 The environmental quality throughout St James's Street varies. The road and pavements are narrow and appear cluttered and uneven in places. A number of shop frontages have been refurbished and have new fascias, although many remain old and run-down and in need of investment. The centre has a number of attractive, older buildings, and investment in their repair and refurbishment would substantially improve the appearance of this vibrant shopping centre.
- 8.57 Overall, we consider the number and variety of shops in St James's Street district centre has been well maintained, and the centre provides a good range of shopping facilities to meet the everyday

requirements of the catchment population. It also has a strong representation of quality niche retailers which may draw shoppers from further afield through 'word-of-mouth/reputation'.

LOCAL CENTRES

8.58 There are a number of Local Centres within the retail hierarchy distributed throughout Brighton & Hove (Plan 8). Many provide an important 'walk in' source for local top up shopping. Table 8.9 and 8.10 illustrates the floorspace breakdown and number of unit in each centre by comparison, convenience, service and vacant categories. A small number of foodstores represented within these local centres are identified in the Household Telephone Survey (Table 19, Appendix 10). Many others are, however, too small to be acknowledged as shopping destinations by respondents compared to the larger foodstores and town centres.

Table 8.9: Local Centre Floorspace Composition

Local Centre	Comparison Sq m net	Convenience Sq m net	Service Sq m net	Vacant Sq m net	Miscellaneous Sq m net	TOTAL sq m net
Beaconsfield Rd	157	120	104	41	0	422
Eldred Ave., Withdean	64	91	158	0	65	378
Fiveways, Brighton	337	362	703	68	354	1,824
High Street, Rottingdean	530	267	736	37	565	2,135
Hollingbury Place, Brighton	121	78	124	172	85	580
Ladies Mile Road, Patcham	91	150	396	0	130	767
Longridge Ave., Saltdean	383	314	310	44	313	1,364
Lustrells Vale, Saltdean	110	318	204	144	96	872
Mill Lane, Portslade	50	90	41	177	41	399
Old London Road, Patcham	114	487	57	48	25	731
Portland Road, Hove	2,268	512	1,503	425	952	5,660
Richardson Road, Hove	254	213	103	42	44	656
Seven Dials, Brighton	489	459	937	78	379	2,342
St George's Road, Kemp Town	1,137	545	947	517	699	3,845
The Grenadier, Hangleton	473	717	618	0	364	2,172
Warren Way, Woodingdean	263	267	243	120	155	1,048
Whitehawk Road, Brighton	333	458	160	66	127	1,144
TOTAL	7,174	5,448	7,344	1,979	4,394	26,339

Source: Brighton & Hove City Council

Table 8.10: Local Centre Unit Composition

Local Centre	Comparison	Convenience	Service	Vacant	Miscellaneous	TOTAL
Beaconsfield Rd	3	3	4	1	0	11
Eldred Ave., Withdean	1	2	3	0	1	7
Fiveways, Brighton	8	5	16	1	5	35
High Street, Rottingdean	15	6	15	1	14	51
Hollingbury Place, Brighton	3	2	3	4	2	14
Ladies Mile Road, Patcham	2	3	10	0	3	18
Longridge Ave., Saltdean	7	3	6	1	4	21
Lustrells Vale, Saltdean	3	4	5	4	2	18
Mill Lane, Portslade	1	2	4	0	1	8
Old London Road, Patcham	3	2	2	1	1	9
Portland Road, Hove	38	9	32	8	14	101
Richardson Road, Hove	4	6	3	1	1	15
Seven Dials, Brighton	16	7	25	2	6	56
St George's Road, Kemp Town	26	10	21	11	13	81
The Grenadier, Hangleton	10	7	12	0	4	33
Warren Way, Woodingdean	4	2	5	3	4	18
Whitehawk Road, Brighton	9	5	6	3	3	26

Source: Brighton & Hove City Council

SUMMARY

- 8.59 District Centres in Brighton & Hove provide a varied mix of shopping centre in terms of physical characteristics, retail offer and overall health.
- 8.60 Boundary Road/Station Road forms a busy linear high street, with a strong budget retail offer. The centre suffers from traffic congestion and restricted pedestrian movement, and shop units are inconsistent in style and size, lacking any historical/architectural style. The centre appears to perform in line with its intended role, providing essential everyday services, and provides a popular shopping destination for the local catchment. Our assessment has highlighted some vulnerabilities of the centre, particularly south of New Church Road in the secondary shopping area, and the need for investment in shop frontages and the overall environment.

- 8.61 Brighton Marina is unique, with an entirely different character and built form. Apart from the Asda foodstore, which performs a main food shopping destination for a wider catchment area, the centre is not performing in line with its intended role as a district centre, lacking a number of essential shops and services. The district centre boundary is identified as being historic, excluding key elements of the Marina's evolution, namely the leisure uses, cinema, casino and health & fitness club. The SPG produced for development control purposes concluded that The Marina is seriously deficient environmentally, visually, functionally, and economically and is in need of substantial investment, development and improvement.
- 8.62 Lewes Road forms a busy main arterial road leading in and out of Brighton & Hove, and despite the Sainsbury's anchor foodstore, our assessment has identified a potentially vulnerable district centre. Surrounded by a dense area of residential development, the centre has a good range of everyday services such as a post office, bank and pharmacy, but a poor range and quality of comparison goods retailers. Vacancy rates are high, pedestrian flows are low, retail fascias have generally not been maintained, retail frontages are interrupted by residential streets, and the environment and pedestrian movements are hampered by traffic congestion.
- 8.63 St James's Street is a vibrant district centre located close to Brighton City Centre. The centre has a good choice and range of service, convenience and comparison goods retailers with a number of quality specialist/niche retailers. The centre has the lowest vacancy rate compared to other district centres, high pedestrian flows, and a vibrant evening economy. The narrow street does suffer from congestion and pavements are narrow and cluttered in places. A number of retail frontages have been recently refurbished to a high standard, but others are poorly maintained and require investment. Overall, we feel that St James's Street is a busy, popular and vibrant shopping destination.

9. OUT-OF-CENTRE RETAIL PROVISION

- 9.1 We have undertaken a qualitative review of out-of-centre retail provision to recognise the distribution of retail floorspace currently competing with town centre provision and to inform our assessment of the need for new retail floorspace in Brighton & Hove.

CONVENIENCE

- 9.2 Brighton & Hove has two main out-of-centre foodstores: Sainsbury's in West Hove and Asda in Hollingbury. The large out-of-centre Asda at Hollingbury is located towards the northern outer boundary of the local authority area, some distance from the main urban area. It is the largest foodstore in Brighton & Hove, with a floorspace of 6,131 sq m net. It opened in 1987 and has a wide range of retail goods and other services. The store has a bakery, fishmonger, delicatessen, hot food take-away and pizza counter.
- 9.3 Following a recent extension, there is also a wide range of non-food goods including a George clothing range, toys, DIY products, jewellery and children's clothing. A number of aisles are also dedicated to electrical goods, computer games, bathroom and kitchen accessories, gardening products, mobile phones, music and films. The store is easily accessible on the main road network and is particularly busy, with the car park often at full capacity. In qualitative terms, it would appear problematic for the store to absorb any increase in expenditure.
- 9.4 Sainsbury's in West Hove is located towards the western boundary of the local authority area, just north of Boundary Road/Station Road District Centre. The foodstore benefits from good access to the main road network being located on the A293 linking with the A27 Shoreham by-pass and the A270 Old Shoreham Road. The store opened in 1992 following an appeal in June 1991, and has a retail floorspace of 4,663 sq m net, including an extension (1997) of 1,046 sq m net. There is a range of non food goods including a Tu clothing range, household goods and soft furnishings, toys, and music and films. The store has a number of food counters including a delicatessen, hot food take-away, butchers, fishmongers and a bakery. Additional facilities include a restaurant, car wash and petrol station. The store is often busy, but the large car park is rarely at full capacity, and is often only half full. In qualitative terms, it would appear possible for the Sainsbury's to absorb an increase in expenditure.
- 9.5 There is also a Co-Op at Nevill Road in Hove that attracts a small proportion of people from the catchment area. The store is open 7 days a week and has a restaurant/coffee shop, bakery, pharmacy and circa 350 car parking spaces. A Lidl foodstore on Arundel Road also attracts a small proportion of shoppers from the survey area. The store has a retail floorspace of approximately 578 sq m net.

- 9.6 Brighton & Hove has a number of smaller Tesco Express format stores, i.e. those serving local 'top up' food shopping roles. Three stores appeared more widely acknowledged in the results of the household telephone survey compared to other similar stores. These include stores at Dyke Road, Hove; Woodingdean; and the Droveaway, Brighton (Plan 8).
- 9.7 The performance of each out of centre store is discussed further in Section 10.

COMPARISON

- 9.8 There is no large dominant retail park in Brighton, and relatively little, good quality floorspace. Retail warehousing is instead dispersed throughout Brighton & Hove. The Pavilion Retail Park is situated adjacent to the A270 Lewes Road, just over a mile to the north-east of the city centre. It opened in 1989 and has a retail floorspace of approximately 6,677 sq m gross, and retailers include a B&Q mini warehouse with garden centre, Halfords and Comet. A small Roseby's is located inside Comet. While small, the park is accessed directly from the A270 and is visible from the main road. Current occupiers are all traditional bulky goods retailers.
- 9.9 MFI and Argos are situated on the Hollingbury Industrial Estate, on the northern fringe of the built-up area close to the Asda food superstore. Carpetright previously occupied an adjoining unit but recently closed and the unit is now occupied by Next. Matalan and Brantano Shoes occupy modern stores on a site adjacent to MFI.
- 9.10 The main concentrations of retail warehousing in Hove are along the Old Shoreham Road. In 1998, the Goldstone Retail Park, which totals around 76,000 sq ft opened in the area. The Park, which is built on the site of the former Brighton & Hove Albion football stadium, is highly visible and easily accessible, particularly by car, to residents throughout Brighton and Hove. Retailers include Toys R Us, JJB Sports, Comet and DFS. In addition, Burger King has a stand-alone restaurant on the park.
- 9.11 Close by, a number of retail warehouse operators trade from an industrial estate on Sackville Road, including Focus, the Suite Shop, Halfords and Vokins. In addition, Furniture Village opened a store in 1999 at the corner of Sackville Road and Old Shoreham Road. Nearby is another cluster comprising Homebase, Carpetright and Currys; and Wickes share a unit with Allied Carpets on Davigdor Road, to the west of Brighton city centre.

PROPOSALS/COMMITMENTS

- 9.12 There are currently proposals in the pipeline for the redevelopment and extension of the existing B&Q store at the Pavilion Retail Park, Lewes Road in conjunction with the development of the adjoining Preston Barracks. Preston Barracks is owned by Brighton City Council, and Hyde Housing and Wilson Bowden have been selected as the City Council's preferred development partners to deliver the redevelopment of Preston Barracks.

- 9.13 In addition to the B&Q, the scheme is likely to include further retail floorspace on both the Pavilion Retail Park and Preston Barracks. In July 2005, Blue Sky Planning produced a Preliminary Retail Assessment, which highlighted the intention to integrate the Pavilion Retail Park and Preston Barracks. The proposals under discussion with the City Council comprise the following:
- 14,000 sq m of B1 offices;
 - 3,000 sq m innovation centre;
 - Approximately 520 residential units;
 - Approximately 375 sq m of A1 food retailing;
 - The redevelopment of the 3,900 sq m B&Q store to provide a B&Q Warehouse totalling 11,277 sq m;
 - A new retail unit of approximately 690 sq m;
 - Approximately 415 sq m of leisure uses within Classes A3-A5.
- 9.14 The proposals are still in the discussion stage and no planning application has yet been received.

SUMMARY

- 9.15 Brighton & Hove has two major out-of-centre foodstores. The Asda store is trading well, and it would appear in qualitative terms problematic for the store to absorb an increase in expenditure; the Sainsbury's appears to be trading well, but the car park is rarely at full capacity and could possible absorb a greater level of expenditure. A Co-op, Lidl and a number of smaller format stores supplement this provision.
- 9.16 There is no large dominant retail park in Brighton, and relatively little, good quality floorspace. Retail warehousing is instead dispersed throughout Brighton & Hove. There are currently proposals to redevelop the B&Q warehouse at the Pavilion Retail Park and the redevelopment of the adjoining Preston Barracks. This scheme is likely to include further retail floorspace on both the Preston Barracks site and the Pavilion Retail Park.

10. CAPACITY PROJECTIONS

- 10.1 In this section we estimate the current performance of the town centres and out-of-centre retail provision in Brighton & Hove, as the basis for forecasting the need for further retail floorspace to the period 2016, incorporating interim years of 2009, 2011 and 2016. The capacity tables accompanying this assessment are attached in Appendix 10 and 11.
- 10.2 We have used a conventional and widely accepted step by step methodology which draws upon the results of the Household Telephone Survey of existing shopping patterns to model the existing flows of available expenditure to each retail destination. To develop the baseline, we have:-
- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the Brighton & Hove catchment area;
 - Allocated the available expenditure to the convenience and comparison goods shopping destinations, on the basis of the Household Telephone Survey of shopping patterns, so as to provide estimates of current sales and forecasts of future sales;
 - Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities in each shopping destination.
- 10.3 Building on the baseline position, we have explored the capacity for further convenience and comparison retail floorspace.

DATA INPUTS

i) Survey Area and Household Survey

- 10.4 In order to provide detailed factual information on the shopping patterns in Brighton & Hove, we commissioned a new Household Interview Survey covering 1,000 households. GVA Grimley designed the survey questionnaire in consultation with Brighton & Hove City Council, and NEMS who undertook interviewing and data processing. The survey area is illustrated on Plan 2.
- 10.5 To ensure a sensible geographical boundary for the survey area we drew on the Regional Assessment commissioned by SEERA (2004), and GVA Grimley's specific localised knowledge from recent work in adjoining authorities (Mid Sussex District Council, Horsham District Council and Lewes District Council). We drew on up-to-date survey material for an extensive and consistent geographical area stretching from Brighton to East Grinstead/Crawley in the North, Hailsham in the east and Horsham/Billingshurst/Pulborough in the west.
- 10.6 The telephone survey boundary also took into consideration the local authority boundary in relation to the existing retail hierarchy, the adjoining catchment population/urban areas, out of centre retail

provision and competing centres in the wider catchment. The influence of Shoreham and inflow into Brighton's catchment is accounted for within the in-centre survey discussed further below paragraph 10.77).

10.7 The survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove inappropriate responses, such as 'internet/mail order shopping'. For convenience goods, the Household Telephone Survey included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weight, which reflects the estimated proportion of expenditure accounted for by each type. For food we use a 75%/25% top-up food weighting. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore, for each survey Zone.

10.8 The survey also includes six questions on specific comparison goods types which coincide with Experian Business Solutions definition of comparison goods expenditure. The retail and needs modelling exercise uses the weighted averages of the Household Survey responses for each goods type based on the proportion of per capita expenditure on that goods type. This process will establish the pattern of spending for residents of each Zone in terms of the following types of goods:

- Clothes and shoes;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic electrical appliances;
- TV, Hi Fi, Radio etc;
- Personal/luxury goods.

ii) Estimates of Population in the Survey Area

10.9 Population estimates and forecasts for each of the survey Zones were prepared from the Experian e-marketer in-house system. This provides estimates of population in 2005, 2009, 2011 and 2016. Experian data is based on trend line projections and the 2001 census for small, localised areas. Overall, the population of the survey area is currently 499,650. It is forecast to grow to 517,374 by 2009 and again to 525,014 by 2011. By 2016, the population is forecast to reach 543,886. These figures represent a particularly strong growth of 9% between 2005 and 2016 (Table 1, Appendix 10).

iii) Available Expenditure in the Survey Area

- 10.10 The Experian e-marketer system provides estimates of per capita expenditure for convenience and comparison goods in 2003 prices. We have made deductions for special forms of trading which represent expenditure not available to spend in the shops, i.e. internet and catalogue shopping. We have currently applied uniform per capita expenditure figures across the survey area, enabling a comparison on the same basis across the whole area.
- 10.11 In terms of expenditure growth in Brighton & Hove, we have drawn on convenience and comparison goods growth rates provided by Experian Business Solutions. These indicate that more growth will take place on comparison goods as opposed to convenience; the scope to purchase more food is more limited than the scope to purchase non-food goods. Experian Business Solutions estimate an ultra long term convenience goods growth rate of 0.7% per annum and an ultra long term comparison goods growth rate of 4.3% per annum.
- 10.12 In terms of convenience goods, the current per capita expenditure is £1,649 per annum. This is forecast to grow to £1,720 per annum by 2011 and again £1,781 per annum by 2016. Table 2, Appendix 10, applies per capita expenditure to population forecasts, which indicates that total available convenience goods expenditure within the Brighton & Hove survey area is currently £824m. This is forecast to grow to £877m by 2009, £902m by 2011 and again to £969m by 2016. This equates to an overall growth of £144m between 2005 and 2016 (Table 2, Appendix 10).
- 10.13 In terms of comparison goods, the current per capita expenditure is £3,227 per annum. This is forecast to grow to £4,154 per annum by 2011 and again to £5,127 by 2016. Total available comparison goods expenditure within the Brighton & Hove survey area is currently £1.6bn, and is forecast to grow to £2.8bn by 2016. This equates to an overall growth of £1.2bn between 2005 and 2016 (73%). (Table 2, Appendix 10).

iv) Floorspace Data

- 10.14 The comparison and convenience goods floorspace data used in our modelling has been drawn from the Institute of Grocery Distribution (IGD), Brighton & Hove City Council and Experian Goad. Brighton & Hove City Council undertake annual shop audits of their centres which incorporate floorspace by units. Our floorspace assumptions for foodstores include, where appropriate, an adjustment to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non-food floorspace; we have adjusted the net floorspace to identify the proportion of sales space allocated for convenience goods. This accords with the expenditure data and the expenditure assumptions used.

CONVENIENCE GOODS CAPACITY PROJECTIONS

10.15 Addressing each town centre and out-of-centre destination in turn, we review shopping patterns and the performance of existing convenience goods floorspace. We then highlight forecast capacity within the local authority area up to 2016. Modelling tables are set out in Appendix 10.

i) Brighton City Centre

10.16 We estimate the trade draw of Brighton City Centre for convenience goods (Table 3, Appendix 10). This includes an examination of the trade drawn to Waitrose on Western Road, Marks and Spencer Foodhall on Western Road, the combined draw of other smaller and independent convenience stores, and a total town centre convenience goods trade draw. The trade draw of the convenience stores in Brighton City Centre is made up of main food and top-up food shopping. 'Other' town centre foodstores include all other units in the town centre selling convenience goods, including bakers, butchers and greengrocers.

10.17 It is evident from our analysis that the town centre convenience goods trade draw is relatively self-contained. Brighton is located on the boundary of Zone 1 and 2, and it is evident that Zone 3 also forms part of the catchment area. Brighton City Centre has the strongest market share in Zone 2 (12%) and a market share of 4% in Zone 1, 5% in Zone 3 and also 4% in Zone 11. Foodstore provision in Brighton City Centre has a weak influence on shopping patterns elsewhere in the survey area (Table 3, Appendix 10).

10.18 Waitrose on Western Road has a market share of 7% in Zone 2, 1% in Zone 1 and 3% in Zone 3. The store also draws a very small amount of trade from Zones 11 and 12. In total, we estimate that the store has a total convenience goods turnover of approximately £17.3m (Table 4, Appendix 10). This equates to a sales density of circa £16,542 per sq m net. Compared to an average sales density for Waitrose of £10,879 per sq m net, this analysis indicates that the store is trading strongly, above average levels.

10.19 Marks and Spencer Foodhall on Western Road has a more limited influence than Waitrose, with a market share of 3% in Zone 2, 1% in Zone 1 and 0% in Zone 3. In total, we estimate that the store has a total convenience goods turnover of approximately £9.4m (Table 4, Appendix 10). This equates to a sales density of circa £11,793 per sq m net. Compared to an average sales density for Marks and Spencer of £10,292 per sq m net, this analysis indicates that the store is trading above average levels. The trading performance of a Marks and Spencer Foodhall within a comparison goods shopping unit is sometimes under-estimated within the results of the Telephone Survey due to its perception as a clothing destination. While the Telephone Survey indicates that the store is trading well, it is likely that the turnover is even stronger after taking account of top-up and linked trip shopping patterns.

- 10.20 Trade draw to other smaller and independent convenience goods retailers in Brighton & Hove City Centre is weaker than both Waitrose and Marks and Spencer Foodhall although this is to be expected when they perform smaller top-up shopping roles. These retailers have a market share of 2% in Zone 1, 2 and 3 and 1% in Zone 10. We forecasts that collectively they achieve a turnover of approximately £7.1m, equating to an average turnover of £3,956 per sq m net (Table 4, Appendix 10). Based on experience elsewhere, we consider that these foodstores catering principally for 'top-up' convenience food shopping are trading in accordance with their intended role.
- 10.21 We estimate that the total convenience goods turnover in Brighton & Hove City Centre is currently £33.8m, approximately 4.1% of total available convenience goods expenditure in the survey area. Based upon a total net sales floorspace of approximately 3,637 sq m, Brighton City Centre currently has an average convenience goods sales density of £9,294 per sq m net. This is higher than our estimate of company average sales densities for the principal and local foodstores in the city centre (£7,356 per sq m net).
- 10.22 It should be noted that the Telephone Survey does not pick up tourists or business users living outside the survey area who undertake lunchtime shopping trips to the town centre foodstores. Trade not identified within the raw data will boost estimated turnover figures outlined above. Whilst we have not made any allowance for these caveats, these factors will increase spending in foodstores thus contributing to any need for additional floorspace.
- 10.23 The limited influence of foodstore provision in Brighton City Centre is reflected on Plan 9: Dominant Foodstore Operator by Zone. The plan illustrates that alternative foodstore operators in Zone 1, 2 and 3 are stronger than foodstore operators within the City Centre. Notably, Asda at Brighton Marina is the most dominant foodstore in Zone 1, Sainsbury's in West Hove is the most dominant foodstore in Zone 2 and Asda in Hollingbury is the most dominant foodstore in Zone 3.

ii) Hove Town Centre

- 10.24 We have estimated the trade draw of Hove town centre for convenience goods (Table 5, Appendix 10). This includes an examination of the trade draw to Co-op, Blatchington Road, Iceland, Blatchington Road and the Tesco superstore on Church Road, and the combined draw of other smaller and independent convenience stores and a total town centre convenience draw. 'Other' town centre foodstores include all other units in the town centre selling convenience goods including bakers, butchers and greengrocers.
- 10.25 It is evident from our analysis that the town centre convenience goods trade draw is almost entirely limited to Zone 2. Hove is located in Zone 2 of the survey area, close to the boundary with Zone 4. The highest convenience goods trade draw is in Zone 2 (19%), and a limited market share in Zone 1, 4 and 5 (2%). (Table 5, Appendix 10).

- 10.26 The Co-op store on Blatchington Road has a market share of 2% in Zone 2 and 4 and 1% in Zone 3. In total, we estimate that the store has a total convenience goods turnover of approximately £4.6m (Table 6, Appendix 10). This equates to a sales density of circa £4,921 per sq m net. Compared to an average sales density for Co-op of £3,575 per sq m net, this analysis indicates that the town centre store is trading well at above average levels, despite strong competition from the new town centre Tesco.
- 10.27 The Iceland store on Blatchington Road has a market share of only 1% in Zone 2 and Zone 4. In total, we estimate that the store has a total convenience goods turnover of £2.1m (Table 6, Appendix 10). This equates to a sales density of circa £5,073 per sq m net. Compared to an average sales density for Iceland of £4,717 per sq m net, this analysis indicates that the town centre store is also trading well at above average levels.
- 10.28 The Tesco superstore on Church Road has the strongest influence on the catchment area with a market share of 17% in Zone 2, 2% in 1 and 5 and 1% in Zone 4, 11 and 12. In total, we estimate that the store has a total convenience goods turnover of approximately £39.4m (Table 6, Appendix 10). This equates to a sales density of circa £14,829 per sq m net. Compared to an average sales density for Tesco of £11,932 per sq m net, this analysis indicates that the town centre store is trading particularly well at above average levels. These findings are consistent with our qualitative assessment which highlights a clean, modern and busy foodstore.
- 10.29 Trade draw to other smaller and independent convenience goods retailers in Hove town centre is similar to the turnover of Iceland on Blatchington Road. These local stores have a market share of only 1% in Zone 2, and collectively, they achieve a turnover of approximately £2.4m, equating to an average turnover of only £2,160 per sq m net. We consider that this is perhaps a little lower than what may be expected, but does reflect the strength of competing stores in the town centre.
- 10.30 We estimate that the total convenience goods turnover of Hove town centre is currently £48.5m, approximately 5.9% of total available convenience goods expenditure in the survey area. Based upon a total net sales floorspace of approximately 5,127 sq m net, Hove town centre currently has an average convenience goods sales density of £9,458 per sq m net. This is above our estimate of company average sales densities for the principal and local foodstores in the town centre (£8,087 per sq m net).

iii) London Road Town Centre

- 10.31 We have estimated the trade draw of London Road town centre for convenience goods (Table 7, Appendix 10). This includes an examination of the trade draw to Sainsbury's on London Road, Somerfield on London Road, Co-op on London Road, Iceland on London Road, the combined draw of other smaller and independent convenience stores, and a total town centre convenience draw. 'Other' town centre foodstores include all other units in the town centre selling convenience goods, including bakers, butchers and greengrocers.

- 10.32 London Road is located to the north of Brighton in Zone 1, and close to the boundary of Zone 2 and 3. It is evident from our analysis that total convenience goods provision in London Road centre has a market share of 12% in Zone 1, 8% in Zone 2 and 5% in Zone 3. London Road has a limited influence throughout the rest of the survey area although does draw some trade from Zones 3 to 6, 7, 10 and 11. (Table 7, Appendix 10).
- 10.33 Sainsbury's is the most dominant foodstore in London Road town centre with a market share of 7% in Zone 1, 6% in Zone 2 and 1% in Zone 3 and 11. In total, we estimate that the store has a total convenience goods turnover of approximately £22.7m (Table 8, Appendix 10). This equates to a sales density of circa £19,148 per sq m net. Compared to an average sales density for Sainsbury's of £10,041 per sq m net, this analysis indicates that the town centre is trading particularly well at above average levels, despite the stores qualitative misgivings outlined in Section 7.
- 10.34 Somerfield on London Road is less influential than Sainsbury's. It has a market share of 4% in Zone 1, 1% in Zone 2, 2% in Zone 3 and 1% in Zones 5 and 6. In total, we estimate that the store has a total convenience goods turnover of approximately £10.8m (Table 8, Appendix 10). This equates to a sales density of circa £7,838 per sq m net. Compared to an average sales density for Somerfield of £4,728 per sq m net, this analysis indicates that the store is trading well above average levels.
- 10.35 The Co-op store on London Road has a market share of only 1% in Zones 1, 3 and 10. In total, we estimate that the store has a convenience goods turnover of approximately £2.4m (Table 8, Appendix 10). This equates to a sales density of circa £3,163 per sq m net. Compared to an average sales density for Co-op of £3,575 per sq m net, this analysis indicates that the town centre store is trading marginally below average levels.
- 10.36 The Iceland foodstore has a market share of only 1% in Zone 3. The store has a turnover of just £0.3m equating to a sales density of £669 per sq m net. Compared to an average sales density for Iceland of £4,717 per sq m net, this analysis indicates that the town centre store is trading poorly. The weaker performance of Co-op and Iceland may be due to shopper perceptions and the strong range of competing foodstores in the centre, although the actual turnover of the stores may be higher after taking account of their 'top-up' roles (visitors/local businesses).
- 10.37 We estimate that the total convenience goods turnover of London Road town centre is currently £37.5m, approximately 4.5% of total available convenience goods expenditure in the survey area. Within the central Zones, i.e. Zones 1, 2 and 3, convenience goods provision in London Road town centre accounts for approximately 9% of available convenience goods expenditure. Within the whole survey area, and based upon a total net sales floorspace of approximately 4,513 sq m, London Road town centre currently has an average convenience goods sales density of £8,300 per sq m net. This is above what we would expect for the principal and local foodstores in the town centre (£5,800 per sq m net).

10.38 The town centre evidently has a strong customer base and is identified as being a busy shopping destination in the qualitative assessment. In the future, convenience goods provision in London Road town centre is forecast to undergo significant change. Notably, the development of the station site adjoining London Road will include a new Sainsbury's food superstore, leading to the closure of the existing Sainsbury's foodstore within the prime retail frontages. Recent press publications have also highlighted the intention of Co-op to close the department store in the near future. The implications of these changes for London Road town centre are discussed further in Section 11.

iv) Lewes Road District Centre

10.39 We have estimated the trade draw of Lewes Road District Centre for convenience goods (Table 9, Appendix 10). This includes an examination of the trade drawn to Sainsbury's on Lewes Road, the combined draw of other smaller and independent convenience stores and a total town centre convenience draw. 'Other' town centre foodstores include all other units in the town centre selling convenience goods, including bakers, butchers and greengrocers.

10.40 Town centre convenience goods provision in Lewes Road District Centre has a market share of 17% in Zone 1, (the Zone in which it is located), 5% in Zone 2 and 4% in Zone 3 (adjoining Zones). Market shares fall to 0% throughout the rest of the survey area (Table 9, Appendix 10).

10.41 It is evident that the large Sainsbury's superstore on Lewes Road has the strongest influence within Zone 1 (17%) and a somewhat weaker market share in Zone 2 (5%) and Zone 3 (4%). In total, we estimate that the store has a total convenience goods turnover of approximately £35.4m (Table 10, Appendix 10). This equates to a sales density of circa £15,140 per sq m net. Compared to an average sales density for Sainsbury's of £10,041 per sq m net, this analysis indicates that the town centre store is trading particularly well, above average levels. These findings reflect the stores role as a major foodstore shopping destination, its location on the main road network, and its adjoining multi-storey car park.

10.42 Trade draw to other smaller and independent convenience goods retailers in Lewes Road District Centre is significantly weaker than Sainsbury's, with a market share of only 1% in Zone 1. Collectively, other town centre foodstores achieve a turnover of less than £1m, equating to an average turnover of £402 per sq m net (Table 10, Appendix 10). We consider that this is a particularly low level of turnover for district centre convenience shops, although does reflect the limited provision of other top-up foodstores in Lewes Road District Centre.

10.43 We estimate that the total convenience goods turnover of Lewes Road is currently £36.4m, approximately 4.4% of total available convenience goods expenditure in the survey area. Based upon a total net sales floorspace of approximately 2,900 sq m, Lewes Road District Centre currently has an average convenience goods sales density of £12,541 per sq m net. This is a strong performance, above our estimate of company average sales densities for the principal and local foodstores in the town centre (£8,682 per sq m net).

v) St James's Street District Centre

- 10.44 We have estimated the trade draw of St James's Street District Centre for convenience goods (Table 11, Appendix 10). This includes an examination of the trade drawn to Somerfield on St James's Street, the combined trade draw of other smaller and independent convenience stores, and a total town centre convenience goods trade draw. 'Other' town centre foodstores include all other units in the town centre selling convenience goods, including bakers, butchers and greengrocers.
- 10.45 Compared to the other centres in Brighton & Hove, the district centre convenience goods trade draw is particularly limited with a market share of only 2% in Zone 1 and 2% in Zone 5. Located immediately to the east of Brighton City Centre, this is likely to reflect the centre's position in close proximity to strong convenience provision at the Brighton Marina, in Hollingbury and on Lewes Road. The qualitative assessment of St James's Street also recognised the more restricted road accessibility to the store.
- 10.46 It is evident that the Somerfield store has a total convenience goods turnover of approximately £3.6m (Table 12, Appendix 10). This equates to a sales density of circa £2,467 per sq m net. Compared to an average sales density for Somerfield of £4,728 per sq m net, this analysis indicates that the store is struggling, trading below company average levels, although the store was observed to be popular and busy on the day of the site visit. Collectively, other smaller and independent convenience goods retailers in the district centre achieve a turnover of only £0.2m, equating to an average turnover of only £286 per sq m net (Table 12, Appendix 10). We consider this is a poor performance for local stores based on experience elsewhere.
- 10.47 We estimate that the total convenience goods turnover of St James's Street District Centre is currently £3.8m, approximately 0.5% of total available convenience goods expenditure in the survey area. Based upon a total net sales floorspace of approximately 2,101 sq m, St James's Street District Centre currently has an average convenience goods sales density of only £1,806 per sq m net. This is considerably lower than our estimate of company average sales densities for the principal and local foodstores in the town centre (£4,205 per sq m net).

vi) Boundary Road/Station Road District Centre

- 10.48 We have estimated the draw of the District Centre for convenience goods (Table 13, Appendix 10). This includes an examination of the trade drawn to Tesco Metro on Station Road, the combined draw of other smaller and independent convenience stores and a total town centre convenience trade draw. 'Other' town centre foodstores include all other units in the town centre selling convenience goods, including bakers, butchers and greengrocers.
- 10.49 In terms of convenience goods, the district centre's catchment area appears to be restricted to Zones 2 and 4 with a market share of 6% and 15% respectively. The centre also has a 1% market share in Zone 6. Market shares fall to 0% throughout the rest of the survey area (Table 13, Appendix 10).

- 10.50 Tesco Metro, located within the core shopping area on Station Road, has a market share of 13% in Zone 4, 6% in Zone 2 and 1% in Zone 6. In total, we estimate that the store has a total convenience goods turnover of approximately £22.9m (Table 14, Appendix 10). This equates to a sales density of circa £12,888 per sq m net. Compared to an average sales density for Tesco of £11,932 per sq m net, this analysis indicates that the store is trading well, above average levels.
- 10.51 Trade draw to other smaller and independent convenience goods retailers in the district centre appear to be considerably weaker with a market share of only 2% in Zone 4. These foodstores in the district centre cater principally for 'top-up' convenience goods shopping and we forecast that they collectively achieve a turnover of approximately £1.4m, equating to an average turnover of £2,607 per sq m net (Table 14, Appendix 10). We consider this is perhaps weaker than the trading level expected for local stores based on experience elsewhere, although the actual turnover may be higher after taking account of their 'top-up' roles, i.e. from passers by and linked trips with adjoining retailers.
- 10.52 We estimate that the total convenience goods turnover of Boundary Road/Station Road District Centre is £24.3m, approximately 2.9% of total available convenience goods expenditure in the survey area. Based upon a total net sales floorspace of approximately 2,313 sq m, the district centre currently has an average convenience goods sales density of £10,498 per sq m net. This is higher than our estimate of company average sales densities for the principal and local foodstores in the town centre (£9,852 per sq m net), which is consistent with our qualitative assessment reflecting the popularity of the district centre as a local shopping destination.

vii) Brighton Marina District Centre

- 10.53 The Asda food superstore at the Brighton Marina is the only foodstore in the district centre. The store functions as a major food shopping destination with a stronger influence in the catchment area compared to foodstore provision in other district and town centres. Located in Zone 1, it is evident from our analysis that the store has a strong degree of influence in survey Zones 1 (24%) and 11 (28%). The store also has a market share of 1% in Zones 2, 4, 7 and 10 and 9% in Zone 12 (Table 15, Appendix 10). Significantly, it is evident from Plan 16, that the Asda foodstore in the district centre is the dominant foodstore in Zone 1 and 11. For the catchment area, this is the principal food shopping destination.
- 10.54 We estimate that the store currently has a turnover of approximately £48.3m, which equates to approximately 5.9% of total available convenience goods expenditure in the survey area. The store does, however, have a lower turnover than the Asda store at Hollingbury and Sainsbury's in West Hove. Based upon the stores turnover, and with a net convenience goods sales area of 2,776 sq m, the sales density of the store is approximately £17,389 per sq m net. This sales density is considerably higher than the level based on Asda's company average sales density (£12,356 per sq m net).

viii) Local Centres

10.55 There are a number of small scale foodstores located in local centres that appear in the results of the household telephone survey, and evidently absorb a proportion of total available convenience goods expenditure within Brighton's catchment area. There is also a commitment for a Tesco Metro store in Rottingdean Local Centre, outlined in Table 22, Appendix 10.

- Tesco Express, Woodingdean;
- Co-Op, Carden Avenue, Patcham;
- Co-Op, Rottingdean;
- Co-Op, Lustrells Vale;
- Co-Op, Warren Road;
- Co-Op, Fiveways.

Tesco Express, Woodingdean

10.56 The Tesco Express foodstore in Woodingdean is less influential than the similar store formats on Dyke Road and the Droveaway. The store currently has a market share of only 1% in Zone 1 equating to a turnover of circa £1.4m. Based upon this turnover, and a net convenience goods sales area of approximately 221 sq m, the sales density of the store is approximately £6,389 per sq m net. Unlike the other Tesco Express stores in Brighton & Hove this is lower than the level based upon Tesco's company average sales density (£11,392 per sq m net) reflecting the weaker sales efficiency of the unit.

Co-op, Carden Avenue, Patcham

10.57 The Co-op store in Patcham is located in Zone 3 of the survey area and has a market share of 8% in this Zone and a 0% market share throughout the rest of the survey area. We estimate that the store currently has a turnover of approximately £3.7m. Based upon this turnover, and a net convenience goods sales area of only 118 sq m, the sales density of the store is approximately £31,017 per sq m net. Like the Tesco Express stores on the Droveaway and Dyke Road, this is significantly higher than the level based upon Co-op's company average sales density £3,575 per sq m net, and reflects the popularity of the store and consequence strong sales efficiency within a small floor plate.

Co-Op, Rottingdean

10.58 The Co-Op foodstore in Rottingdean local centre has a market share of 3% in Zone 1, and a turnover of approximately £3.9m. Based upon this turnover, and a net convenience goods sales area of only 143 sq m net, the sales density of the store is approximately £27,350 per sq m net. This is

significantly higher than the level based upon Co-Op's company average sales density of £3,575 per sq m net. We would recommend an element of caution due to the small sample size and market share input into the model.

Co-Op, Lustrells Vale

- 10.59 The Co-Op foodstore in Lustrells Vale local centre has a market share of 1% in Zone 11, and a turnover of approximately £128,000. Based upon this turnover, and a net convenience goods sales area of only 162 sq m net, the sales density of the store is approximately £790 per sq m net – significantly lower than the level based upon Co-Op's company average sales density of £3,575 per sq m net.

Co-Op, Warren Road

- 10.60 The Co-Op foodstore in Warren Road local centre has a market share of only 0.3% in Zone 1, and a turnover of approximately £471,000. Based upon this turnover, and a net convenience goods sales area of only 217 sq m, the sales density of the store is approximately £2,170 per sq m net – marginally below the level based upon Co-Op's company average sales density of £3,575 per sq m net.

Co-Op, Fiveways

- 10.61 Like the Co-Op in Warren Road, the Co-Op foodstore in Fiveways local centre has a market share of only 0.3% in Zone 1, and a turnover of approximately £471,000. Based upon this turnover, and a net convenience goods sales area of 133 sq m, the sales density of the store is approximately £3,541 per sq m net - in line with the level based upon Co-Op's company average sales density of £3,575 per sq m net.

viii) Out-of-Centre Convenience Goods Provision

- 10.62 Our analysis of the Household Telephone Survey has identified the trade draw and catchment areas of the principal out-of-centre foodstores in Brighton & Hove. The Tesco Express stores are small petrol station stores and the Lidl and Co-Op provide small scale shopping facilities:

- Asda, Hollingbury
- Sainsbury's, Old Shoreham Road, West Hove
- Tesco Express, Dyke Road
- Tesco Express, The Droveaway
- Lidl, Brighton

- Co-Op, Nevill Road

Asda, Hollingbury

- 10.63 The Asda food superstore in Hollingbury is the largest foodstore in Brighton & Hove. Located in Zone 3, it is evident from our analysis that this store has a strong degree of influence in a number of the survey Zones including 1 (15%), 2 (7%), 3 (65%), and 9 (5%). The store also has some influence on shopping patterns in Zone 4 and 5 (4%), 6 and 10 (1%), and 7, 11 and 12 (2%). Within the Brighton & Hove survey area, it is evident from Plan 16, that Asda in Hollingbury is the dominant foodstore operator in Zone 3 with a 65% market share.
- 10.64 We estimate that the store currently has a turnover of approximately £70m, which equates to approximately 47% of the combined turnover of the out-of-centre foodstores (listed in Table 19, Appendix 10). Based upon this turnover, and with a net convenience goods sales area of 4,292 sq m, the sales density of the store is approximately £16,247 per sq m net. This sales density is significantly higher than the level based on Asda's company average sales density (£12,356 per sq m net).

Sainsbury's, Old Shoreham Road, West Hove

- 10.65 The Sainsbury's store in West Hove, is located in Zone 2 of the survey area and is the second largest foodstore in Brighton & Hove. It is evident from Plan 16 that the foodstore is the dominant foodstore operator in Zone 2, and major foodstore competition includes the Tesco store in Shoreham-by-Sea, Asda in Hollingbury and Asda at the Brighton Marina. The store currently has a market share of 23% in Zone 4, 19% in Zone 2, 5% in Zone 3 and 5, 2% in Zone 1 and 1% in Zone 11. The store has a market share of 0% throughout the rest of the survey area. We estimate that the store currently has a turnover of £62.7m, which equates to approximately 42% of the combined turnover of the out-of-centre foodstores in Brighton & Hove (Table 19, Appendix 10).
- 10.66 Based upon the turnover of the store, with a net convenience goods sales area of approximately 4,026 sq m, the sales density of the store is approximately £15,575 per sq m net. This is somewhat higher than the level based upon Sainsbury's company average sales density (£10,041 per sq m net).

Tesco Express, Dyke Road

- 10.67 The strong performance of Tesco Express stores, discussed below, is perhaps unsurprising given their small floorplates and highly accessible locations, often on petrol forecourts. Their profile and convenience appears to result in strong trading levels.
- 10.68 The Tesco Express on Dyke Road has a market share of 3% in Zone 2, 2% in Zone 5 and 1% in Zone 9. We estimate that the store currently has a turnover of approximately £7.5m and a sales

density of approximately £38,061 per sq m net. This is considerably higher than Tesco's company average sales density at present (£11,932 per sq m net), and is also performing considerably higher than Tesco Express formats elsewhere in Brighton & Hove. This strong performance reflects the popularity and convenience of the store in this location on a relatively busy road network.

Tesco Express, The Droveaway

- 10.69 The Tesco Express convenience store on the Droveaway has a market share of 2% in Zone 2 and 1% in Zone 9 and 12. We estimate that the store currently has a turnover of approximately £4.9m. Based upon this turnover, and a net convenience goods sales area of approximately 112 sq m, the sales density of the store is approximately £43,902 per sq m net. Again, this is significantly higher than the level based upon Tesco's company average sales density (£11,932 per sq m net) and reflects the popularity of the store and consequent strong sales efficiency.

Lidl, Arundel Road, Brighton

- 10.70 The household telephone survey suggests that the Lidl foodstore on Arundel Road has a market share of 1% in Zone 12 and a store turnover of approximately £902,000. Based upon this turnover, and a net convenience goods sales area of approximately 578 sq m, the sales density of the store is approximately £1,561 per sq m net. This is below the level based upon Lidl's company average sales density (£4,086 per sq m net) and suggests the store is under performing. We strongly recommend caution in interpretation, however, given the low sample size and market share for this particular store.

Co-Op, Nevill Road

- 10.71 The Co-Op store on Nevill Road has a 1% market share in Zone 2 and a 0.3% market share in Zone 4 and a store turnover of approximately £2.1m. Based upon this turnover, and a net convenience goods sales area of approximately 1,510 sq m, the sales density of the store is approximately £1,374 per sq m net. This is below the level based upon Co-Op's company average sales density (£3,575 per sq m net). Again, these figures should be treated with an element of caution given the low market share, and in reality the turnover could be higher when the full extent of its top up shopping role is taken into consideration.

CONVENIENCE GOODS GLOBAL CAPACITY

- 10.72 Our capacity assessment has factored in identified foodstore commitments, notably a new Sainsbury's store on the Station Site. We have factored in the closure of the existing Sainsbury's foodstore on London Road, and incorporated a net floorspace increase. Based on a total net additional convenience goods floorspace of 1,680 sq m net and a company average sales density, we estimate the store will generate an additional foodstore turnover of circa £16m. Further commitments include Sainsbury's Local format which has since opened on Western Road, Brighton

City Centre; Aldi in Boundary Road/Station Road District Centre; and Tesco Metro in Rottingdean Local Centre. These will have a combined turnover of circa £7.4m.

- 10.73 Based on our assessment of the growth in expenditure and the performance of existing floorspace, we consider that there will be surplus expenditure available to support further convenience goods floorspace in Brighton & Hove between 2005 and 2016. Our projections are summarised in Table 23, Appendix 10, which indicates that by 2009 there will be £97m of residual expenditure to support new convenience goods floorspace, which is forecast to grow to £109.9m by 2011 and again to £142.6m by 2016.
- 10.74 When converting this residual expenditure into floorspace we have incorporated a sales density of £10,000 per sq m net, a minimum level required by most major foodstore operators. On this basis, there is capacity for an additional 9,696 sq m net of convenience goods floorspace by 2009, growing to 10,989 sq m net by 2011, and again to 14,256 sq m net by 2016.
- 10.75 In reality, we do not consider it is possible for foodstore development in the defined centres to absorb the full extent of capacity for additional convenience goods floorspace up to 2016. It is prudent to point out, however, that capacity generated in out-of-centre locations does not justify the development of further out-of-centre convenience goods floorspace in Brighton & Hove. In line with Government policy it will be necessary to direct global capacity into the town centres. We consider the Council should be cautious in terms of new major out-of-centre foodstore proposals, including extensions to existing stores, given the impact on existing centres. Any foodstore proposals in an edge or out-of-centre location must demonstrate that they meet the following requirements, set out in PPS6:
- The need for development;
 - That the development is of an appropriate scale;
 - That there are no more central sites for the development;
 - That there are no unacceptable impacts on existing centres;
 - That locations are accessible.

COMPARISON GOODS ASSESSMENT

i) Brighton City Centre

- 10.76 Table 3, Appendix 11 indicates the trade draw of Brighton City Centre. It is evident that the influence of Brighton City Centre extends across the full extent of the survey area. Located on the boundary of Zone 1 and 2 the centre has a 59% and 57% market share in these Zones respectively. The centre also has a market share of 55% in Zone 3 and 47% in Zone 11. Market shares in the remaining

survey Zones range from 8% up to 34%. Plan 17 illustrates the extent of the town centre's influence throughout the defined survey area highlighting variations in market share. It is clear from this analysis, however, that the survey area does not capture the full extent of the Brighton City Centre catchment area.

- 10.77 Within the whole survey area, Brighton City Centre draws 40% of total available comparison goods expenditure, totalling £634m. In order to understand the full extent of Brighton's catchment area and accurately calculate the turnover of the city centre, we drew on the in centre survey undertaken in Brighton City Centre. This enabled us to robustly estimate the proportion of shoppers in the city centre travelling from beyond the survey area boundary including Shoreham, i.e. the inflow of trade. The origin of all shoppers travelling to Brighton City Centre from across the country is illustrated on Plan 18. The assessment enabled us to calculate a 17% inflow of comparison goods expenditure from beyond the survey area (Plan 12).
- 10.78 On the basis of current market shares, and the inflow of expenditure, we estimate that Brighton City Centre currently has a comparison goods turnover of approximately £764m. With an existing shop floorspace of approximately 54,696 sq m net, we estimate that Brighton City Centre has a sales density of approximately £13,968 per sq m net. Based on our experience elsewhere, we consider that Brighton & Hove is performing considerably well in this sector, at above expected levels of between £6,000 – £9,000 per sq m. These findings are consistent with our qualitative assessment of the city centre outlined in Section 5.

ii) Hove Town Centre

- 10.79 Table 5, Appendix 11 indicates the trade draw of Hove town centre for comparison goods. It is evident that the comparison goods catchment area of Hove town centre is considerably more constrained than Brighton City Centre, focusing primarily on Zone 2 (12%) and 4 (8%). The centre also has a 2% market share in Zone 3 and a 1% market share in Zone 1, 6, 8, 11 and 12. Zone 2 and 4 are the Zones closest to Hove and reflect the settlement pattern in the catchment area and more localised role that the town centre performs compared to the larger centre of Brighton.
- 10.80 Hove town centre currently retains approximately 4.1%, or £67m of comparison goods trade within the whole survey area. At a more localised level, the centre retains circa 10.3% of total available comparison goods expenditure in Zones 2 and 4. Taking the survey area as a whole, and on the basis of current market shares, we estimate that Hove town centre currently has a comparison goods turnover of approximately £67m (Table 6, Appendix 11). With an existing shop floorspace of approximately 8,532 sq m net, we estimate that Hove town centre has a sales density of approximately £7,841 per sq m net. This is a particularly strong trading level for a centre at this position in the retail hierarchy, and highlights its popularity and good performance.

iii) Retail Warehousing

- 10.81 Brighton & Hove has an extensive range of retail warehousing illustrated on Plan 8. Hollingbury Industrial Estate comprises both bulky goods retailers and softer High Street retailers including MFI, Matalan and Brantano Shoes. It is evident from the results of the Household Telephone Survey that the industrial estate has a market share of 1% in Zone 1, 9% in Zone 3, 1% in Zone 4 and 2% in Zone 9 (Table 7, Appendix 11).
- 10.82 On the basis of current market shares, we estimate that the Hollingbury Industrial Estate currently has a comparison goods turnover of £12.8m (Table 8, Appendix 11). Based upon an existing retail floorspace of approximately 6,123 sq m net, the Household Telephone Survey suggests that the industrial estate has a sales density of approximately £2,094 per sq m net. Based upon a company average sales density for the whole industrial estate (£2,617 per sq m net) our assessment indicates that the industrial estate is under performing. Next have recently opened in the unit previously occupied by Carpetright, and is likely to have enhanced the attraction of the industrial estate. Moreover, Next trade at circa £7,500 per sq m, whereas Carpetright trade at circa £1,194 per sq m net, and the opening of the clothing retailer will result in an uplift in the overall turnover of the industrial estate.
- 10.83 The Pavilion Retail Park comprises Rosebys, Halfords, Comet and B&Q. The presence of B&Q and consequent perceptions of the location of DIY retailing in Brighton & Hove is reflected in the results of the Household Telephone Survey. The retail park has a particularly strong influence on comparison goods shopping patterns in the survey area, with a market share of 16% in Zone 1 and 12% in Zone 3. The retail park has a market share of between 1% and 5% in the remaining survey Zones. On the basis of current market shares, we estimate that the Pavilion Retail Park currently has a comparison goods turnover of £95.8m, higher than Hove town centre (Table 8, Appendix 11). Based upon an existing retail floorspace of approximately 4,087 sq m net, the results of the Telephone Survey suggest that the retail park has a sales density of approximately £23,448 per sq m net. Based upon a company average sales density for the whole retail park (£2,025 per sq m net) our assessment indicates the strength of the trading performance of the retail park, and is likely to be a consequence of the representation of B&Q and the perceptions of B&Q as a DIY shopping destination.
- 10.84 Retail warehousing on Old Shoreham Road and the Goldstone Retail Park could not be defined separately in the results of the Household Telephone Survey, and has therefore been considered together for the purposes of the capacity modelling. This stretch of retail warehousing also has a strong influence on comparison goods shopping patterns in Brighton & Hove, with an 18% market share in Zone 2, 7% in Zone 4 and 5% in Zone 3. There is also a minimal market share in Zone 5, 6 and 12. On the basis of current market shares, we estimate that retail warehousing on Old Shoreham Road currently has a comparison goods turnover of £88.4m (Table 8, Appendix 11). Based upon an existing retail floorspace of approximately 11,092 sq m net, the results of the Telephone Survey suggests that collectively the units have a sales density of approximately £7,974

per sq m net. Based upon a company average sales density for the retail warehouse units combined (£2,512 per sq m net) our assessment indicates that this area of retail warehousing is performing particularly well.

- 10.85 Retail warehousing on Sackville Road did not register in the results of the Household Telephone Survey. Units comprise Focus, The Suite Shop, Halfords and Vokins, and evidently are not recognised as a primary shopping destination for bulky goods. The results of the Telephone Survey did not therefore give an indication of the turnover of the units, and although they are trading to some extent, it is likely that they are not performing as successfully as retail warehouse provision elsewhere in Brighton & Hove. Wickes and Allied Carpets are located on Davigdor Road and are recognised as comparison goods destination in the results of the Telephone Survey, but to a very limited extent reflecting its more secondary role compared to more dominant areas of retail warehousing in Brighton & Hove. A B&Q Warehouse is located just beyond the survey area boundary, on the coast road before Shoreham. This is likely to have some influence on shopping patterns in the survey area.

COMPARISON GOODS GLOBAL CAPACITY

- 10.86 In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time; we have assumed an annual growth rate in existing sales per sq m net of 2.5%. Drawing on our experience elsewhere in similar sized and performing centres we have also assumed that new floorspace should achieve sales of at least £6,000 per sq m net in 2005, also growing by 2.5% per annum. This assessment has considered the effect of Brighton & Hove maintaining its existing market share and used growth in available expenditure to support the development of new floorspace. In the latter part of the LDF, Brighton & Hove could face increasing competition from centres in the wider sub-region if new town centre schemes go ahead, notably in Crawley and Eastbourne. Maintaining existing market share will become increasingly important in retaining the city centre's role as a sub-regional centre.
- 10.87 Based upon this assessment, it is evident from Table 12, Appendix 11 that there will be capacity to support further comparison goods floorspace in Brighton & Hove by virtue of growth in population and available expenditure. We estimate that by 2009, based on current market shares, there would be theoretical capacity to support an additional 17,355 sq m net of comparison goods floorspace increasing to 27,250 sq m net by 2011 and to 53,675 sq m net by 2016.
- 10.88 In order to translate these projections into gross town centre floorspace requirements, it is necessary to incorporate a net: gross ratio. Conventionally, a figure of 65% has been assumed, although improved design may enable higher net:gross ratios to be achieved. It would also be reasonable to apply an additional 15% of floorspace (of the total scheme) for A2/A3 uses. In this scenario, the net capacity figures equate to a gross capacity figure of 31,412 sq m by 2009, 49,321 sq m by 2011 and 97,149 sq m by 2016. These figures do not include leisure floorspace, which has become a common feature of current town centre development proposals in the UK.

- 10.89 It should be noted that capacity generated in out-of-centre locations does not justify the development of further out-of-centre comparison goods floorspace in Brighton & Hove. In line with Government policy it will be necessary to direct global capacity into the town centres in the first instance.

SUMMARY

- 10.90 Our capacity projections indicate the total population of the survey area is forecast to grow from 499,650 in 2005 to 543,886 in 2016 – a strong increase of 9%. Convenience goods expenditure is expected to increase from £824 in 2005 to £968m by 2016. In the comparison sector, higher growth rates illustrate that spending will increase from £1.6bn in 2005 to £2.8bn by 2016 – an overall growth of £1.2bn of comparison goods expenditure between 2005 and 2016.
- 10.91 In terms of convenience provision a number of key town centre foodstores are performing well compared to estimated company averages: Waitrose and M&S in Brighton City Centre; Co-Op, Iceland and Tesco in Hove Town Centre; Sainsbury's and Somerfield in London Road Town Centre; Sainsbury's in Lewes Road District Centre; Tesco Metro in Boundary Road District Centre; and Asda in Brighton Marina. Our analysis indicates, however, that some stores are under-performing, including the Co-Op and Iceland in London Road Town Centre; and Somerfield in St James's Street. In terms of out-of-centre provision, Asda in Hollingbury and Sainsbury's in West Hove are both performing particularly well.
- 10.92 Our analysis has indicated the following residual capacity to support additional retail floorspace over the forthcoming LDF period:

Table 10.1: Convenience Goods Baseline Capacity Projections (£m)

2009 (£m)	2011 (£m)	2016 (£m)
97.0	109.9	142.6

Table 10.2: Convenience Goods Baseline Capacity Projections (sq m net)

2009 (sq m net)	2011 (sq m net)	2016 (sq m net)
9,696	10,989	14,256

Table 10.3: Comparison Goods Baseline Capacity Projections (£m)

2009 (£m)	2011 (£m)	2016 (£m)
114.9	189.6	422.5

Table 10.4: Comparison Goods Baseline Capacity Projections (sq m net)

2009 (sq m net)	2011 (sq m net)	2016 (sq m net)
17,355	27,250	53,675

11. SCOPE FOR NEW DEVELOPMENT/RECOMMENDATIONS

- 11.1 Drawing on our qualitative and quantitative analysis, including our assessment of retailer demand, this section considers the scope for accommodating new retail development in Brighton & Hove. We examine Brighton City Centre and each of the town and district centre's assessed in this report in turn.

BRIGHTON CITY CENTRE

- 11.2 Our assessment of Brighton City Centre has identified a healthy centre, performing well in a number of vitality and viability indicators in line with its intended role as a regional centre. The analysis did, however, highlight potential signs of vulnerability and areas of opportunity to enhance and strengthen the centre over the forthcoming LDF period. In particular, retailer demand is strong but there is a lack of suitable modern retail units to meet current/future demand, and there are limited opportunities for significant new retail development within the core of the centre. Brighton City Centre has a weak representation of department store operators, and this position will be exposed further following completion of the Crawley town centre redevelopment anchored by John Lewis, and potential new department store anchored scheme in Eastbourne.
- 11.3 Other principal problems include the lack of connectivity linking the separate character areas (Plan 11), and the under performance of retail frontages on Western Road and North Street (primary retail frontages) in terms of the quality and size of unit and retailer representation. It is evident from our analysis in previous sections, including growing competition in the sub-region, that there is a need to identify opportunities to create additional retail space, but also to redevelop and modernise existing stock.
- 11.4 At present, Brighton City Centre offers a wide and dynamic retail and leisure offer attracting shoppers, visitors and tourists from across the country, and further afield. The strong performance in health check indicators should not, however, lead to complacency over the forthcoming LDF period. The Council must instead approach policy formulation in a pro-active way to address the identified weaknesses in Brighton as a regional shopping destination. In particular, we believe the Council should focus on identifying potential development opportunities, investing heavily in improving connectivity and pedestrian circulation throughout the centre, improving the overall visual environment and cleanliness of the City, and redevelop/modernise retail units within the primary retail frontages on Western Road and North Street.

Convenience Goods

- 11.5 In terms of convenience goods, our analysis has highlighted limited foodstore provision in the town centre, comprising Waitrose on Western Road, Marks & Spencer and a small Tesco and Sainsbury's local. The City Centre does not have a major anchor foodstore, and there are no plans in the

- pipeline for the position to change in the future. Both Waitrose and Marks & Spencer are trading particularly well and enhance the vitality and viability of the centre despite strong out-of-centre competition.
- 11.6 Convenience goods capacity projections for Brighton & Hove identify capacity for an additional 9,696 sq m net of convenience goods floorspace by 2009, growing to 10,989 sq m net by 2011 and again to 14,256 sq m net by 2016. These figures take into consideration the net increase in floorspace following the opening of Sainsbury's on the Brighton Station site and closure of Sainsbury's on London Road. They do not take into consideration the proposed closure of the Co-Op foodstore on London Road.
- 11.7 We consider that there is an opportunity to extend town centre foodstore provision to absorb surplus capacity over the forthcoming LDF period. The significant surplus capacity arises, however, from the over trading of existing town centre and out-of-centre foodstores throughout Brighton & Hove, and does not in itself represent capacity for the full residual capacity identified. There is currently a sustainable pattern of foodstores throughout Brighton & Hove, in terms of geographic distribution and accessibility, and any new proposals would have to accord with the key tests outlined in PPS6.
- 11.8 Foodstore Provision in Brighton City Centre currently retains circa 4% of total available convenience goods expenditure, and it is certainly possible for Brighton to enhance this trade retention through new development. New development is dependent on an appropriate site or the ability to extend existing stores, which may prove difficult given the constrained nature of the built environment in Brighton. New foodstore development may also impact on traffic flows and already notable congestion through the centre, and would require detailed consideration.
- 11.9 We strongly recommend that surplus capacity is directed towards defined city/town centres, but if no more central sites exist, it may be appropriate to increase floorspace beyond the town centre boundary to meet the identified need in floorspace, provided it demonstrates compliance with the key policy tests (PPS6). We consider the Council should be cautious in terms of new major out-of-centre foodstore proposals given the impact on existing centres, and the growth in quality, small scale foodstore operators within town centres, such as Tesco, Jubilee Street and Taj Mahal opposite Waitrose in Brighton City Centre. We recommend the Council should not allocate further sites beyond the town centre for foodstore development. Any foodstore proposal in an edge or out-of-centre location must demonstrate that they meet the following requirements, set out in PPS6:
- The need for development;
 - That the development is of an appropriate scale;
 - That there are no more central sites for the development;
 - That there are no unacceptable impacts on existing centres;
 - That locations are accessible.

Comparison Goods

- 11.10 Driven by a strong forecast growth in retail expenditure and growing competition in the wider sub-region, we consider there is potential to increase, improve and consolidate comparison goods retail floorspace in Brighton City Centre. In particular, there is a need to meet the growing demand from retailers requiring larger modern retail units. The retailer demand analysis highlighted that Brighton is currently ranked 6th in the country with a strong level of retailer interest in the town centre. These include department store operators Harvey Nichols and House of Fraser. Low vacancy rates and high retailer demand suggest a strong qualitative need for new retail development.
- 11.11 The Household Telephone Survey highlights the strong trading performance of the City Centre. With a current turnover of £764m, including a 17% inflow from beyond the survey area boundary, the centre has a sales density of £13,968 per sq m net. Based on our experience elsewhere, we consider that Brighton & Hove is performing considerably well in this sector, at above expected levels of between £6,000 – £9,000 per sq m. These figures emphasise the strong trading performance of the City Centre and indicate a need for additional floorspace to absorb the large pot of available expenditure.
- 11.12 Capacity projections identify capacity for additional comparison goods floorspace in Brighton & Hove over the forthcoming LDF period. On the basis it is able to maintain its current market share in the face of growing competition, we estimate capacity for circa 17,355 sq m net of comparison goods floorspace by 2005, 27,250 sq m net by 2011, and 53,675 sq m net by 2016. In order to translate these projections into gross town centre floorspace requirements, it is necessary to incorporate a net:gross ratio, as set out in paragraph 10.88. In this scenario, our assessment identifies capacity for 33,218 sq m gross by 2009, 52,071 sq m gross by 2011 and 102,414 sq m gross by 2016, including A2/A3 Use floorspace. These figures include the Jubilee Street and North Street Quadrant retail commitments.
- 11.13 At present, Brighton retains circa 39% of total available comparison goods expenditure within the survey area. The remaining trade is being directed towards the competing centres in the wider sub-region and out-of-centre retail warehousing. Following the implementation of the Crawley town centre scheme, anchored by John Lewis, Brighton's market share could erode as shoppers change their centre of preference. It will be important for Brighton to enhance and consolidate its role to prevent such an outcome.
- 11.14 It is evident from Plan 11 that Brighton City Centre is not compact and has a number of different character areas. This is one of Brighton's strengths, providing the unique retail and leisure offer to draw a large number of visitors from a wide area. The current function of the centre is also, however, one of its key weaknesses. The congested roads, awkward road junctions and pedestrian crossing points, and lack of signage and direction hampers pedestrian circulation throughout the centre. North Street is the key spine route through the centre and investment in the public realm could substantially

- improve pedestrian movements across North Street and to other character areas. The Council should aim to enhance integration, both physically and visually, within the City Centre.
- 11.15 In order to address the issues identified in this study, we recommend that the Council commission an Area Action Plan for the City Centre to provide the planning framework for change. The Development Plan Document can help deliver planned growth areas, stimulate regeneration, protect areas particularly sensitive to change, resolve conflicting objectives in areas subject to development pressures, and focus the delivery of area based regeneration initiatives. The Area Action Plan would recommend the most appropriate way forward in terms of connectivity, the public realm and identification of development opportunity sites.
- 11.16 The boundary for the Area Action Plan is likely to be drawn wider than the existing retail frontage boundary, although this should be discussed and finalised with the appointed consultants and project steering group. In reality, we consider the opportunity to expand the retail area is limited, although an Area Action Plan should take into consideration other town centre uses and land composition within the regional centre. The Area Action Plan would provide the opportunity to link up with a number of wider initiatives, such as BIDS, the Cultural Quarter, the Seafront area and Legibility Strategy. It would also benefit from joint working with the cultural/tourism team, transport, design and the Economic Partnership/City Centre Forum.
- 11.17 We consider the defined primary and secondary retail frontages should be retained over the forthcoming LDF period, although primary shopping frontages on the southside of Western Road should be reviewed. At present, they are not performing in accordance with their intended role as primary shopping frontages, and unless policy promotes their modernisation/redevelopment we consider they should be redefined as secondary shopping frontages. Primary shopping frontages on the north side of Western Road should be retained with a view to modernising this stretch of retail frontage and improving the environment and connectivity with Churchill Square.
- 11.18 Due to the nature of the built up urban area, there is little evidence of major development opportunity sites. Whilst we recommend the Council explores this in more detail with the powers of compulsory purchase if necessary, we consider that the Council should also focus on piecemeal, in-fill redevelopment and modernisation of existing stock. This is particularly the case on North Street which is not currently fulfilling its potential as a main town centre 'high street'. The Council should consider the possibilities of amalgamating units to provide the critical mass of retailers required to reinforce the centre's regional shopping role.
- 11.19 We understand from the Council that the Post Office site on Ship Street is a potential site for redevelopment (Policy SR9, adopted Local Plan July 2005). The Policy states that in the event of the Post Office relocating to another site in central Brighton planning permission will be granted for a mixed use scheme comprising Class A1 retail use on the whole of the ground floor with residential accommodation above, retaining the existing listed building.

- 11.20 We consider this may provide an ideal opportunity to enhance retail provision on North Street, and we strongly recommend amalgamating the site with units fronting onto North Street to provide the important linkages through to the main 'high street' or spine route through the City Centre. The Council should encourage bringing this site forward comprehensively, through compulsory purchase if necessary. A development could introduce units suitable for the major retailers, but we recommend the potential for a department store should be tested in the first instance. It is perhaps the only opportunity to bring a new department store to the City Centre over the forthcoming LDF period.
- 11.21 It is essential that any redevelopment on North Street contributes to the environment, enhancing the centre's distinctive character driven by quality design. The most recent 'box' development currently occupied by Free Spirit, Peacocks and Sports Soccer does provide the large floorplates required, but does not reflect the high design standards represented elsewhere in the City Centre and should be avoided in the future. The redevelopment of the North Street Quadrant, Hannington's department store, and units on East Street are quality developments in design terms and should set the precedent for future developments in the centre.
- 11.22 The Churchill Square Shopping Centre, accessed via Western Road, is one of few locations in the City Centre that has the large, modern store formats that modern multiple retailers require. If viable, there is the potential to extend the shopping centre to the rear as part of the Brighton Centre redevelopment. The future of this site and implementation of a scheme warrants detailed consideration. We would strongly recommend that all schemes should work and promote strong linkages with the primary shopping frontages and connectivity through to the seafront.
- 11.23 Brighton should be promoted as the main focus for retail and leisure activity over the forthcoming LDF period. While the quality and uniqueness of the different character areas throughout Brighton & Hove should be recognised, the linkages and integration between them are crucial to maintain the quality of the City Centre as a whole. An Area Action Plan would consider all of the key issues comprehensively, including transport/accessibility, pedestrian circulation and connectivity, linkages and signage, and development opportunity sites.

HOVE TOWN CENTRE

- 11.24 Our assessment of Hove town centre has identified a good performing and healthy centre, in line with its intended role in the retail hierarchy. The centre is anchored by a new Tesco food superstore and also has a number of strong comparison goods attractors including Boots, Clarks, Dorothy Perkins, New Look and Superdrug. There is also a good service sector with a number of banks, estate agents, restaurants and cafes with outside seating areas. A low vacancy rate and strong retailer demand suggests that Hove will maintain this role and performance over the forthcoming LDF period, and we recommend Hove retains its definition as a Town Centre with the Brighton & Hove retail hierarchy over the forthcoming LDF period.

- 11.25 In terms of convenience goods, the recently opened Tesco has contributed significantly to the health of the centre and its overall attraction as a shopping destination. Provided shoppers spend £10+ in the Tesco store, they can use the car park for 2 hours and walk straight through to George Street, the main shopping area. The store performs the role of a main food shopping destination, but despite this new competition in Hove, the older Co-Op and Iceland foodstores continue to trade well, above company average levels. These stores are will continue to benefit from customer loyalty and local walk-in trade, while the Tesco foodstore is likely to have attracted new customers to the centre, or clawed back trade from competing out of centre foodstores.
- 11.26 At present, Hove, in Zone 2, is close to the boundary with Zone 1, 3 and 4. Within these Zones, a proportion of trade is being directed towards competing foodstore shopping destinations, outlined in Table 11.1. Despite the strength of Tesco in Hove town centre, Sainsbury's in West Hove continues to be the dominant foodstore operator in Zone 2. Tesco in Hove also has little influence as a foodstore destination beyond Zone 2, due to strong competition from Asda at Brighton Marina, Asda in Hollingbury, Sainsbury's in West Hove and Tesco Metro in Boundary Road/Station Road.

Table 11.1: Key Foodstore Market Shares in Zone 1, 2, 3 and 4

	Zone 1 Market Share	Zone 2 Market Share	Zone 3 Market Share	Zone 4 Market Share
Tesco, Hove Town Centre	2%	17%	0%	1%
Waitrose, Brighton City Centre	1%	7%	3%	0%
Sainsbury's, London Road Town Centre	7%	6%	1%	0%
Sainsbury's, West Hove (Out of Centre)	2%	19%	5%	23%
Sainsbury's, Lewes Road District Centre	17%	5%	4%	0%
Asda, Brighton Marina	24%	1%	0%	1%
Asda, Hollingbury (Out of Centre)	15%	7%	65%	4%
Tesco Metro, Boundary Road/Station Road	0%	6%	0%	13%

Note: Based upon main food shopping trips / excludes top up shopping trips

- 11.27 Based on the existing strength of convenience goods provision in Hove town centre in terms of mix and distribution, we do not consider there is a need for a new food superstore over the forthcoming LDF period. The objective should be to enhance and consolidate existing provision, particularly the run-down Co-Op on Blatchington Road. Although the Co-Op store appears to be performing well at present, there has been little investment in recent years and the new Tesco may have had a negative impact on turnover levels not identified in this study. The future of the store may consequently be uncertain over the LDF period, but the Council should support and encourage the upgrade and retention of this store in this location. We consider there is scope to extend existing convenience goods units if the opportunity arises, provided the physical constraints of the built environment can be overcome, and the key policy tests outlined in PPS6 are demonstrated.

- 11.28 The Household Telephone Survey also highlights the overall strong trading performance of comparison goods floorspace in the town centre. With a current turnover of £67m the centre has a sales density of circa £7,800 per sq m net – higher than what we would expect from a town centre of this size and position in the retail hierarchy. Hove town centre retains only 4.1% of total available comparison goods expenditure in the survey area, and we consider there is potential to enhance this trade retention through new development if an opportunity arises, although the centre is constrained by the built environment. A number of comparison goods retailers are looking for premises in Hove town centre.
- 11.29 While the level of retailer demand is relatively strong, the database has a high number (38%) of A3 service uses including restaurants, cafes and fast food takeaways. This suggests a potential threat to the town centre if the existing balance of uses is not maintained. We recommend that stringent policy be adhered to over the forthcoming LDF period to maintain a good balance of uses in the town centre, and prevent an over dominance of undesirable service uses.
- 11.30 While we consider current frontage designations are appropriate for the forthcoming LDF period, it is prudent to mention the new Use Classes Order, enabling local authorities to allow a certain level of A3 quality restaurant and café uses, while preventing undesirable drinking establishments and hot food takeaways in certain locations. Given the current health of the town centre, we believe the local authority should maintain existing frontage designations and policies over the forthcoming LDF period, encouraging A1 shop uses in the primary frontages, whilst managing more flexible representation in secondary shopping frontages. For example, retail policies could restrict the proportion of A5 uses, while encouraging A3 uses in certain locations.

LONDON ROAD TOWN CENTRE

- 11.31 Our assessment of London Road Town Centre has identified a centre that is not performing well in a number of vitality and viability indicators, and is showing signs of decline. Rents are the lowest within the city and yields are very high indicating a lack of confidence in terms of property investment returns in the area. This is also reflected in the high vacancy rates in the centre and absence of registered retailer requirements. There is also a weak representation of key quality attractors, and retailers are generally from the mid range-discount end of the market. The environmental quality of the area is greatly affected by traffic movements through the centre, and congestion is a particular detractor to the overall shopping experience.
- 11.32 Based on the current position, outcome from the detailed town centre health check, and national retail trends, an improvement to the health of the centre will be a challenge, although achievable in the right circumstances. Recent information from a third party suggests that a multiple retailer may be interested in occupying the existing Sainsbury's store, but nothing has been confirmed and it is too early to comment on potential commitments.

- 11.33 The health check indicators point to a declining centre, a trend that has been taking place for some time, although discussions with the Council point to the continued goals to enhance the health of the town centre. A Scoping Study has been published which highlights key issues for the area, and the opportunity to focus investment on London Road retailing and the open Market. For these reasons, we recommend the Council maintains a Town Centre designation, but the health of the centre should be carefully monitored. If the decline of the centre is not reversed over an appropriate time period, the Council may wish to consider re-designating the centre to a District Centre. PPS6 requires local authorities to identify centres in decline and manage change accordingly. PPS6 requires change in the role and function of centres, upward or downward, to come through the development plan process.
- 11.34 In terms of convenience goods, the centre is going through something of a transition. At present, London Road has a good range of foodstores including Sainsbury's, Iceland, Co-Op and Somerfield, but all are dated with no evidence of recent investment. Sainsbury's is currently constructing a modern new large format foodstore on the Station Site which will have links to London Road, although the strength of the linkages have yet to be proven. The existing Sainsbury's store will close, and the Co-Op store is also closing.
- 11.35 At present, London Road (located in Zone 1) borders Zone 2, 3 and 11. Within these Zones a proportion of trade is being directed towards competing foodstore shopping destinations, outlined in Table 11.2. It is clear that foodstores in London Road have little influence on shopping patterns within the core zones, and the majority of trade is instead being directed to Asda at Brighton Marina and Asda in Hollingbury.

Table 11.2: Key Foodstore Market Shares in Zone 1, 2, 3 and 11

	Zone 1 Market Share	Zone 2 Market Share	Zone 3 Market Share	Zone 11 Market Share
Sainsbury's, London Road Town Centre	7%	6%	1%	1%
Somerfield, London Road Town Centre	4%	1%	2%	0%
Co-Op, London Road Town Centre	1%	0%	1%	0%
Iceland, London Road Town Centre	0%	0%	1%	0%
Tesco, Hove Town Centre	2%	17%	0%	1%
Waitrose, Brighton City Centre	1%	7%	3%	2%
Sainsbury's, West Hove (Out of Centre)	2%	19%	5%	1%
Sainsbury's, Lewes Road District Centre	17%	5%	4%	0%
Asda, Brighton Marina	24%	1%	0%	28%
Asda, Hollingbury (Out of Centre)	15%	7%	65%	2%

Note: Based upon main food shopping trips / excludes top up shopping trips

- 11.36 Based on the convenience goods capacity identified in Brighton & Hove, and the current strong trading performance of Sainsbury's and Somerfield despite their sub-standard units, we consider there is capacity for further convenience goods floorspace in London Road over the forthcoming LDF period. The Council should seek to enhance existing foodstore operators and the Open Market while supporting proposals for extensions/new foodstores. The new Sainsbury's foodstore will go some way to clawing back trade from competing stores, and assist in the rebalance of sustainable travel patterns. Any proposals should, however, be well integrated with the existing shopping frontages, and be of an appropriate scale in accordance with its new role as a district centre, which performs a local 'top-up' shopping role.
- 11.37 The Household Telephone Survey gave no indication of the trading performance of London Road for comparison goods. Unlike Brighton City Centre and Hove Town Centre, shoppers do not acknowledge London Road as a primary shopping destination, and it is not therefore recognised in the results.
- 11.38 Over the forthcoming LDF period, the Council should aim to enhance and consolidate existing retail provision and the overall physical environment, aiming to considerably improve the shopping experience and manage its role as a town centre following the closure of the Co-Op and Sainsbury's. We consider there is capacity for additional comparison goods floorspace in London Road over the LDF period, following the recycling/redevelopment of space on the Co-Op and Sainsbury's sites. Proposed development should be of a scale appropriate to the function of the town centre.
- 11.39 The Council should aim to open up linkages between the new Station Site developments and London Road, encouraging pedestrian circulation and ease of access from the train station. The new Sainsbury's store will attract a new pool of car born customers to the area, and the Council should aim to encourage linked trips between the new store and retail provision on London Road.

DISTRICT CENTRES

- 11.40 Boundary Road/Station Road is a thriving District Centre and we consider it should retain this definition within the retail hierarchy over the LDF period. It forms a busy linear high street, with strong budget retail offer, and the Tesco Metro foodstore is trading strongly. The new Aldi foodstore in the north of the centre has successfully reinforced convenience goods floorspace helping to absorb surplus expenditure and improve the choice for shoppers. We consider there is quantitative capacity to absorb further convenience goods floorspace in the centre, either through a store extension or new store, provided it is of an appropriate scale for the district centre.
- 11.41 The Council should focus on improving the environment over the LDF period, investing in improvements to enhance the 'shopping experience', particularly on New Church Road – the secondary shopping area. Policies within the LDF should aim to protect A1 retail use in the centre, managing/restricting A3/A4/A5 service uses.

- 11.42 Lewes Road is a potentially vulnerable centre. The Sainsbury's food superstore at the top of the centre performs a main food shopping destination and is performing well, but shoppers are car borne and links with the retail frontages are poor, and the centre is performing poorly in a range of health check indicators. Through policy, we consider the centre may benefit from detailed consideration of linkages, integration and pedestrian circulation, and the overall regeneration and future protection of the centre. The centre forms a busy main arterial route leading in and out of Brighton & Hove and has a large walk-in catchment population. On this basis, we consider it is important to maintain a defined centre in this location.
- 11.43 St James's Street is a vibrant district centre located close to Brighton City Centre. The centre has a good choice and range of service, convenience and comparison goods retailers with a number of quality specialist/niche retailers. The centre has a low vacancy rate compared to other district centres, high pedestrian flows, and a vibrant evening economy. The Council should aim to protect the mix of uses over the LDF period, managing the range of A1 and A3/4/5 uses through frontage policies. Improvements should focus on continuing the centre's environmental upgrade, and pedestrian environment.
- 11.44 Brighton Marina is unique, with an entirely different character and built form. Apart from the Asda foodstore, which performs a main food shopping destination for a wider catchment area, the centre is not performing in line with its intended role as a district centre, lacking a number of essential shops and services. The district centre boundary is identified as being historic, and the SPG concluded that the Marina is seriously deficient environmentally, visually, functionally, and economically and is in need of substantial investment, development and improvement. For these reasons, and given the overall objectives for the area, we consider the Brighton Marina should lose its District Centre designation, and instead have its own specific policy designation, enabling the Council to manage planning applications over the LDF period. The policy should state the type of development appropriate within the Marina.

KEY RECOMMENDATIONS

Brighton City Centre

- Increase the supply of modern retail units to meet the growing demand from retailers for space;
- Enhance department store representation, particularly in light of John Lewis anchored shopping centre development in Crawley;
- Identify opportunities to redevelop and modernise existing retail stock, particularly on Western Road and North Street. In target areas, the Council should focus on piecemeal, in-fill redevelopment and modernisation of existing stock;

- The Council should consider the comprehensive redevelopment of the Post Office site together with units fronting North Street to provide important 'links' through the main high street/spine route. The potential for a department store operator should be tested in the first instance;
- The extension of the Churchill Square Shopping Centre warrants detailed consideration over the LDF period – underpinned by strong linkages with the primary shopping frontages and connectivity through to the seafront;
- Any redevelopment / new build should contribute to the environment, enhancing the centre's distinctive character driven by quality design;
- Improve connectivity and linkages between the different character areas throughout the City Centre to enhance pedestrian circulation;
- Protect and enhance foodstore provision in Brighton City Centre, possibly in the form of express/local store formats due to site restrictions;
- We strongly recommend that surplus convenience goods capacity is directed towards existing centres. Any proposals for convenience goods floorspace beyond town centre boundaries should demonstrate compliance with the key policy tests (PPS6). In qualitative terms, we consider that Sainsbury's, West Hove could absorb an increase in expenditure;
- We recommend the Council commission an Area Action Plan for the City Centre to provide the planning framework for change.

Hove Town Centre

- We do not consider there is a need for a new food superstore over the forthcoming LDF period. The future of the Co-Op store is perhaps uncertain, but the Council should support and encourage the upgrade and retention of the unit;
- We consider there is potential to enhance comparison goods trade retention through new development if an opportunity arises. A number of comparison goods retailers are looking for premises in the town centre;
- An over dominance of A3 retailer could harm the vitality and viability of the centre – demand is for space is currently strong. We recommend that stringent policy is adhered to over the LDF period to maintain a good balance of uses in the centre;
- We consider primary/secondary frontage designations are appropriate for the forthcoming LDF period.

London Road

- London Road is performing poorly in a number of health check indicators. This may be exacerbated in the near future following the closure of the Co-Op department store and Sainsbury's on London Road. The Council should maintain the town centre designation, but the health of the centre should be monitored carefully. If it continues to decline over the forthcoming LDF period, the Council may wish to consider re-designating the centre as a district centre;
- Following these closures, and the opening of a new Sainsbury's food superstore on the Brighton Station Site, we consider there is capacity for additional convenience goods floorspace in the centre, provided it is of an appropriate scale and well integrated with the existing shopping frontages;
- The Council should aim to consolidate and enhance existing retail provision and the overall physical environment. We consider there is scope for additional comparison goods floorspace, possibly recycling space on the Co-Op and Sainsbury's site;
- The Council should aim to enhance linkages between London Road and the Station Site, encouraging pedestrian circulation between the train station and new foodstore.

Boundary Road/Station Road

- Boundary Road/Station Road should retain its position as a District Centre within the retail hierarchy;
- We consider there is capacity to increase the amount of convenience goods retail floorspace over the LDF period – although this will be addressed following the opening of Aldi towards the railway line;
- Policies over the LDF should aim to protect A1 uses in key frontages and manage/restrict A3/4/5 uses;
- The Council should continue to maintain and invest in the physical environment, monitoring pedestrian safety and crossing points on the busy road.

Lewes Road

- We consider Lewes Road should maintain its position in the retail hierarchy as a District Centre;
- The centre is performing poorly in a number of health check indicators, and through policy we consider the centre would benefit from detailed consideration of linkages, integration and pedestrian circulation – particularly with the Sainsbury's foodstore.

St James's Street

- The centre is performing well, and the Council should aim to maintain and invest in the environment still further;
- The Council should aim to protect the mix of uses over the LDF period, managing the range of A1 and A3/4/5 uses through frontage policies.

Brighton Marina

- The centre is not performing in line with its intended role as a District Centre, lacking a number of essential shops and services;
- We consider the Brighton Marina should lose its District Centre designation, and instead have its own specific policy designation, enabling the Council to manage planning applications over the LDF period. The policy should state the type of development appropriate within the Marina.