

# Brighton & Hove

Retail Study - March 2006



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## **EXECUTIVE SUMMARY**

### **TERMS OF REFERENCE**

1. GVA Grimley was instructed in August 2005 to undertake the Brighton & Hove Retail Study 2005. 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.
2. 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.
3. 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.
4. 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.

### **POLICY CONTEXT**

5. The Study includes a detailed policy review. 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.
6. 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.

7. 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.
8. 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.
9. 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.
10. 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.
11. 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.

#### **NATIONAL RETAIL TRENDS**

12. 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. 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.
13. 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. 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.

14. 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.
15. 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.

#### **SUB-REGIONAL CONTEXT**

16. 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 centres are located within the survey area, and 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.

#### **CAPACITY PROJECTIONS**

17. 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.

18. 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.
19. At present there are no significant comparison goods retail commitments which would absorb identified capacity. The assessment has, however, factored in the new J Sainsbury store on the Brighton Station site. Our analysis has indicated the following residual capacity to support additional retail floorspace over the forthcoming LDF period:

**Table 1: Convenience Goods Baseline Capacity Projections (£m)**

2009 (£m)	2011 (£m)	2016 (£m)
104.7	117.7	150.3

**Table 2: Convenience Goods Baseline Capacity Projections (sq m net)**

2009 (sq m net)	2011 (sq m net)	2016 (sq m net)
10,472	11,765	15,032

**Table 3: Comparison Goods Baseline Capacity Projections (£m)**

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

**Table 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

## **BRIGHTON CITY CENTRE: RECOMMENDATIONS**

20. 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.

21. 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.
22. 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**

23. 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.
24. Convenience goods capacity projections for Brighton & Hove identify capacity for an additional 10,472 sq m net of convenience goods floorspace by 2009, growing to 11,765 sq m net by 2011 and again to 15,032 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.
25. 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.

26. 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.
27. 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**

28. 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.
29. 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.

30. 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 10.89. 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.
31. 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.
32. 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.
33. 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.
34. 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.

35. 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.
36. 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.
37. 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.
38. 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.
39. 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.
40. 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.

41. 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: RECOMMENDATIONS**

42. 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.
43. 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.
44. 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 10.1. 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 5: Key Foodstore Market Shares in Zone 1, 2, 3 and 4**

	<b>Zone 1 Market Share</b>	<b>Zone 2 Market Share</b>	<b>Zone 3 Market Share</b>	<b>Zone 4 Market Share</b>
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%

45. 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.
46. 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.
47. 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.
48. 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: RECOMMENDATIONS**

49. 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.
50. 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.
51. 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.
52. 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.
53. 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.

54. 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 10.2. 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 6: Key Foodstore Market Shares in Zone 1, 2, 3 and 11**

	<b>Zone 1 Market Share</b>	<b>Zone 2 Market Share</b>	<b>Zone 3 Market Share</b>	<b>Zone 11 Market Share</b>
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%

55. 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.
56. 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.
57. 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 position 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.

58. 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: RECOMMENDATIONS**

59. 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.
60. 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.
61. 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.
62. 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.
63. 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.