



BRIGHTON & HOVE

RETAIL STUDY UPDATE

Brighton & Hove City Council

Final Report

September 2011

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1.0 Introduction

- 1.1 In May 2011 CB Richard Ellis (CBRE) were instructed by Brighton & Hove City Council (from this point forward to be referred to as 'B&HCC') to undertake a retail study update to their previous 2006 assessment published by GVA Grimely.
- 1.2 This retail study update was commissioned following a suspension of the preparation of the Core Strategy. In light of this the purpose of this study is to provide a robust and up-to-date assessment of current and future capacity for retail development across B&HCC. This study is to be used to inform the preparation of the Local Development Framework (LDF) and to accurately determine planning applications for current and future proposals for new retail development.
- 1.3 Since the publication of GVA Grimley's 2006 Retail Study (from this point forward to be referred to as the '2006 Retail Assessment'), there have been a number of changes which will, to varying degrees, influence the assessment of retail capacity and have been accounted for as part of this study update. These include:
 - Revised population projections;
 - The recent economic downturn;
 - Revised data on retail expenditure estimates, and company sales densities;
 - New retail commitments; and
 - Publication of PPS4 and other policy changes.
- 1.4 It was agreed with B&HCC that in undertaking this update, a new household telephone survey to revise the shopping trade patterns of the catchment area will not be commissioned. This update is therefore based on the 2005 household telephone survey of shopping patterns, which was commissioned as part of GVA Grimley's 2006 Retail Assessment.

SCOPE OF WORKS

- 1.5 The methodology for the study incorporates the following elements:
 - A qualitative assessment of existing shopping provision within B&HCC. This part of the study will undertake health checks of B&HCC's principle town and district centres, focusing on the range, mix and quality of uses. The assessment examines their role and function in meeting local shopping needs.
 - A quantitative analysis to assess capacity for further convenience and comparison goods floorspace in B&HCC. Capacity is assessed at the base year of 2011; and then 2016; 2021; 2026; and 2030 in line with the LDF plan period.
 - An assessment of the existing hierarchy, role and function of the principle town and district centres and the appropriateness of retail centre boundaries.
 - A consideration of the scope, if any, for new retail development within B&HCC based on capacity and the identification of sites, if any, for development opportunities.
 - Broad policy recommendations to inform the emerging development plan.
- 1.6 The study is an important evidence base document which will help inform future plan making for B&HCC and its centres which will be used alongside other evidence documents. The document makes broad policy recommendations but does not commit the Council to allocate any parcels of land for further retail development in drafting future policies.

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STRUCTURE OF THE REPORT

- 1.7 Section 2 of the report sets out the qualitative analysis of the existing retail provision in B&HCC. Our assessment of vitality and viability draws upon the indicators of performance set out in PPS4.
- 1.8 Section 3 outlines our methodology and the results of our quantitative analysis of the performance and capacity of B&HCC. We examine existing shopping patterns in the local authority area for food and non-food goods, drawing on the 2005 household survey. Applying up to date population and expenditure forecasts, we assess the quantitative capacity for further food and non-food floorspace across B&HCC.
- 1.9 Section 4 provides our recommendations and conclusions. It summarises the findings of the qualitative and quantitative assessment and deals with the scope for new retail development. This section also presents a series of broad recommendations for strategies to enhance B&HCC's centres.

POLICY CONTEXT

National Retail Planning Policy

Planning Policy Statement 4 (PPS4): Planning for Sustainable Economic Growth

- 1.10 PPS4: 'Planning for Sustainable Economic Growth' was published in December 2009.
- 1.11 PPS4 supersedes previous national policy including not only Planning Policy Statement 6: Planning for Town Centres (2005) but Planning Policy Guidance Note 4: Industrial, commercial development and small firms (1992); Planning Policy Guidance Note 5: Simplified Planning Zones (1992); and sections within Planning Policy Statement 7: Sustainable Development in Rural Areas and Planning Policy Guidance Note 13: Transport and provides consolidated advice for not only retail but other town centre related developments including B1(a) office use.
- 1.12 PPS4 is further supported by detailed practice guidance on the application of need, impact and the sequential approach.
- 1.13 PPS4 emphasises that local planning authorities in their LDF's should positively and proactively plan for economic growth, simplify the planning process where appropriate (including using simplified planning zones), support existing business sectors and ensure that site allocations for economic development, particularly if for single or restricted uses, are not carried forward between plans without evidence of need and a reasonable prospect of use.
- 1.14 The Government's objectives for prosperous economies and sustainable economic development are to:
 - Build prosperous communities by improving the economic performance of cities, towns, regions, sub-regions and local areas;
 - Reduce the gap in economic growth rates, promoting regeneration and tackling deprivation;
 - Deliver more sustainable patterns of development, reduce the need to travel, especially by car, and respond to climate change;
 - Promote the vitality and viability of town centres and others, including:

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- New economic growth and development of main town centre uses to be focused in existing centres, with the aim of offering a wide range of services to communities and remedying deficiencies in provision in areas with poor access to facilities
- Competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres
- The historic, archaeological and architectural heritage of centres to be conserved and, where appropriate, enhanced to provide a sense of place and focus for the community
- Raise the quality of life and environment in rural areas.

Key Changes

- 1.15 The key changes implemented in PPS4, when compared against the policy tests previously in place under PPS6 (2005), are that all new economic development proposals (including retail but excluding residential) now have to be considered against the following key planning tests set out in policy EC10.2:
- The contribution ‘over the lifetime of the development’ to limit carbon dioxide emissions and provide resilience to climate change
 - The accessibility of the proposals by a choice of means of transport, including on foot, by cycle and by public transport and the traffic impact of the development
 - The quality of the design and its contribution to the surrounding area
 - The impact of proposals on economic and physical regeneration
 - Its impact on local employment
- 1.16 In addition, there are specific tests for retail and other ‘town centre uses’ which are summarised below.

Town Centres and Retail

- 1.17 The revised planning rules retain the 'sequential test' that requires the most central town centre sites to be developed first. However, the revised policy removes the 'needs test' in favour of a wider 'impact test' which is intended to provide Councils with a better tool to measure the wider positive and negative effects of retail and other town centre related development. Using this test, Councils are compelled to examine more factors, including retail diversity, impact on town centre investment, scope for regeneration and job creation.
- 1.18 The guidance emphasises an approach for Councils to set priorities through proactive and positive policies, underpinned by a ‘robust evidence base’. As part of this, Councils are encouraged to make provision to target socially disadvantaged areas, support local and independent traders and encourage wider formats of retail, such as markets.
- 1.19 Under the new ‘impact test’, Councils are required to examine more factors including retail diversity, consumer spending, loss of trade, impact on town centre investment, scope for regeneration and job creation.
- 1.20 PPS4 Policy EC3 requires local planning authorities to set out a strategy for the management and growth of centres over the plan period and should:

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“a. set flexible policies for their centres which are able to respond to changing economic circumstances and encourage, where appropriate, high-density development accessible by public transport, walking and cycling.

b. define a network and hierarchy of centres that is resilient to anticipated future economic changes, to meet the needs of their catchments.

c. define the extent of the centre and the primary shopping area in their Adopted Proposals Map having considered distinguishing between realistically defined primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations.

d. consider setting floorspace thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment under (EC16.1) and specify the geographic areas these thresholds will apply to.

e. define any locally important impacts on centres which should be tested (see policy EC16.1.f)

f. encourage residential or office development above ground floor retail, leisure or other facilities within centres, ensuring that housing in out-of-centre mixed-use developments is not, in itself, used as a reason to justify additional floorspace for main town centre uses in such locations.

g. identify sites or buildings within existing centres suitable for development, conversion or change of use.

h. use tools such as development orders, area action plans, compulsory purchase orders and town centre strategies to address the transport, land assembly, crime prevention, planning and design issues associated with the growth and management of their centres. ”

- 1.21 It is noted as part of this balance of positive and negative impacts, that judgements about impact should be informed by the development plan (where this is up to date) and recent local health check assessments which take account of vitality and viability indicators and any other published local information will also be relevant.
- 1.22 In light of the new national planning policy guidance it is imperative that B&HCC has a robust evidence base which informs the strategies adopted by the development plan and future development.

Emerging National Planning Policy Framework (NPPF)

- 1.23 The official draft NPPF was published for consultation on 25th July 2011. The consultation will run until 17th October 2011.
- 1.24 This follows the recently published draft ‘presumption in favour of sustainable development’, and sets out the Government’s economic, environmental and social planning policies for England, which taken together articulate the Government’s vision of sustainable growth, to be ‘interpreted and applied locally to meet local aspirations’. The policies set out in the NPPF will, when published, replace the guidance set out in Planning Policy Guidance and Planning Policy Statements, including PPS4, and have material weight in the preparation of local and neighbourhood plans and to decision making on applications.

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Delivering Sustainable Growth

- 1.25 The Ministerial foreword makes clear the Government’s intention is to cement growth, and the draft NPPF states that the presumption in favour of sustainable development should be the basis for every plan and every decision.
- 1.26 The document confirms that, for the planning system, delivering sustainable growth means: planning for prosperity; planning for people; and planning for places, stating that these three components should be pursued in an integrated way.
- 1.27 The draft NPPF states that local planning authorities (LPAs) should plan positively for new development, approving all individual proposals wherever possible.
- 1.28 It states that Local Plans should be prepared on the basis that objectively assessed development needs should be met; that development proposals that accord with statutory plans should be approved without delay; and that planning permission should be granted where a plan is ‘absent, silent, indeterminate or where relevant policies are out of date’.

Plan Making

- 1.29 The NPPF maintains that the planning system is plan-led, and that therefore Local Plans, and neighbourhood plans where relevant, are the starting point for the determination of any planning application.
- 1.30 The draft NPPF requires each LPA to produce a Local Plan for its area which, as part of the Development Plan, must aim to achieve the objective of sustainable development, as set out in the NPPF, including: housing and economic development requirements; retail, leisure and other commercial development; utilities infrastructure; health, security, community infrastructure and other local facilities; climate change mitigation and adaptation; and protection of the built and natural environment.
- 1.31 Local Plans will continue to be examined by an independent Inspector who will test their soundness against the criteria of it being ‘positively prepared’ as well as ‘justified’; ‘effective’; and ‘consistent with national policy’.
- 1.32 The NPPF states in the interests of deliverability, sites should not be subject to such a scale of obligations and policy burdens that their ability to be developed viably is threatened, and where practical, Community Infrastructure Levy charges should be worked up and tested alongside the Local Plan, and should support and incentivise new development, with a ‘meaningful proportion’ of the funds raised staying with those neighbourhoods where development takes place.
- 1.33 Supplementary planning documents should only be necessary where their production can help to bring forward sustainable development at an accelerated rate, and must not be used to add to the financial burdens on development.

Development Management

- 1.34 The NPPF states that: ‘The primary objective of development management is to foster the delivery of sustainable development, not to hinder or prevent development.’
- 1.35 The tailoring of planning controls to local circumstances is supported, including the appropriate use of Local Development Orders to relax planning controls where the impacts would be acceptable (and in particular where this would boost enterprise and growth), and notes the need to ensure that controls such as Article 4 directions and planning conditions are used appropriately.

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- 1.36 The need for early engagement and front loading of applications is noted, and the use of Planning Performance Agreements ‘*where this might achieve a faster and more effective application process*’. The document also states that statutory consultees should take the same early and pro-active approach.
- Planning for Prosperity – Retail, Leisure and Business Uses
- 1.37 The slimmed down policies of the NPPF reflect the general thrust of PPS4 policies relating to planning for growth including that existing and emerging sectors should be supported and every plan must have a clear economic strategy.
- 1.38 The NPPF proposes a critical step change, however, from PPS4 stating that ‘*planning policies should avoid the long term protection of employment land or floorspace, and applications for alternative uses of designated land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses*’. This is generally positive for the business sector, however, is at odds with the policy position taken by many LPAs in often seeking to resist the loss of employment land.
- 1.39 The ‘town centres first’ approach is maintained for retail and other town centre uses, and although the document does not appear to be as prescriptive of PPS4, the requirement to ensure that retail and leisure needs are met in full remains.
- 1.40 LPAs should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites, allocating appropriate edge of centre sites where suitable and viable town centre sites are not available, and if sufficient edge of centre sites cannot be identified, set policies for meeting the identified requirements in other accessible locations; and set policies for the consideration of retail and leisure proposals which cannot be accommodated in or adjacent to town centres.
- 1.41 When assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up to date Local Plan, the draft NPPF states that LPAs should require an impact assessment if the development is over a proportionate, locally set floorspace threshold. If there is no locally set threshold, the default threshold is 2,500 sq m gross.
- 1.42 The document states that planning policies and decisions should assess the impact of retail and leisure proposals, including: the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to ten years from the time the application is made.
- General Approach
- 1.43 The draft NPPF clearly reflects the Government’s manifesto for growth, and echoes the pro-growth message set out in Ministerial Statements earlier this year. Consistent with the desire to ‘speed up’ the planning system, the document states that planning permission should be granted where a plan is ‘*absent, silent, indeterminate or where relevant policies are out of date*’.
- 1.44 The presumption in favour of sustainable development is described as a ‘golden thread’, which should run through both plan making and decision taking.
- 1.45 In line with the Government’s localism agenda, the draft NPPF states that it sets out the Government’s requirements for the planning system only to the extent that it is relevant, proportionate and relevant to do so, with the aim of providing ‘*a framework within which*

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local people and their accountable councils can produce their own distinctive local and neighbourhood plans, which reflect the needs and priorities of their communities’.

- 1.46 The document notes that: ‘All of these policies should apply unless the adverse impacts of allowing development would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole’. The draft NPPF is clearly a finely balanced document which seeks to retain a degree of control over development, set against what is an obvious expression of the Government’s agenda for growth. There is therefore the potential that different parts of the NPPF will be used against one another in either promoting development or defending existing assets as proposals are considered through the planning system. These different elements are likely to be tested through appeals and judicial challenges, which are in turn likely to provide future precedents.
- 1.47 In this context there could be a significant period of uncertainty in the lead up to, and following the adoption of the NPPF.
- 1.48 The final revised NPPF is expected to be published in 2012.

Regional Policy Background

The South East Plan, May 2009

- 1.49 The Secretary of State published the final version of the South East Plan (also known as the Regional Spatial Strategy for the South East) on May 6 2009. This replaced the Regional Planning Guidance for the South East (RPG9).
- 1.50 The South East Plan identifies Brighton as one of 22 Primary Regional Centres (Policy TC1) which, as a regional hub, will be the focus for large scale developments. The policy recognises that growth will not be restricted to these centres, but that the full network of centres will also include other town centres which will provide main retail and other services in a local area, as well as villages and local centres.
- 1.51 Although the South East Plan currently remains part of the development plan, steps are being taken by the Government to revoke Regional Spatial Strategies including the South East Plan.
- 1.52 The revocation of Regional Spatial Strategies was announced on 6 July 2010 by the Rt. Hon. Eric Pickles MP, the Secretary of State for Communities and Local Government. However following subsequent challenges it remains part of the development plan for B&HCC, until it is abolished through the emerging Localism Bill.

Local Policy Background

Brighton and Hove Local Plan, July 2005

- 1.53 The Brighton and Hove Local Plan was adopted on 21 July 2005. It provides a detailed framework for the use of land and buildings in Brighton & Hove. The review of relevant policies below refers only to those policies that have been ‘saved’ in accordance with B&HCC’s request to the Secretary of State.
- 1.54 The Local Plan sets out retail planning policies to control the location of retail development and establishes the retail hierarchy of centres:
 - Regional Shopping Centre: Brighton (Policy SR4);
 - Town Centres: London Road and Hove (Policy SR5);

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- District Centres: St James Street; Lewes Road; Brighton Marina; and Boundary Road/Station Road (Policy SR5); and
 - Local Centres: Mill Lane; Portland Road; 'The Grenadier'; Richardson Road; Eldred Avenue; Old London Road; Ladies Mile Road; Seven Dials; Fiveways; Hollingbury Place; Beaconsfield Road; St Georges Road; Warren Way; Whitehawk Road; High Street Rottingdean; Lustrells Vale; Saltdean; and Longridge Avenue (Policy SR6).
- 1.55 Policy SR1 permits new retail development within the built up area and within or on the edge of existing defined shopping centres only where it will meet certain criteria, including causing no detriment to the vitality and viability of existing established shopping parades in B&HCC.
- 1.56 Retail development beyond the edge of existing established shopping centres should only be permitted where they meet the criteria set out in Policy SR2. These criteria include prohibiting retail development beyond existing centres unless the site has been identified in the Local Plan for retail development, and a more suitable site cannot be found in a sequentially preferable location.
- 1.57 The development of retail warehouses are also controlled by the above policies. In addition to these, Policy SR3 sets out that, without exception, that planning consent for retail warehouses will be conditioned to the sale of bulky goods only and that the sub-division of units and construction of mezzanine floorspace will be restricted.
- 1.58 Within the defined prime frontages of Brighton Regional Centre, the change of use away from Class A1 use will be restricted under Policy SR4 to ensure that non-retail units do not exceed 25% of the prime retail frontage and that there would not be a significant break of more than 10 metres.
- 1.59 The prime frontages of town and district centres are also protected under Policy SR5 which prohibits the change of use away from Class A1 where it would create a break in the shopping frontage of more than 15 metres.
- 1.60 B&HCC's 17 Local Centres are identified under Policy SR6, where non-retail units should not exceed 35% of the each centre. Similarly A1 uses are protected in local parades under Policy SR7 to not exceed 50% of the centre of the retail frontage.
- 1.61 In relation to individual shops, planning permission for a change of use away from Class A1 will be permitted where it can be demonstrated that the A1 retail use is no longer economically viable for that unit, inter alia.
- 1.62 These policies seek to maintain the existing retail hierarchy of centres within B&HCC, including Brighton as the principal shopping destination. The role of B&HCC's town and district centres in meeting more localised retail and service needs should also be protected. As such, and in line with PPS4, any retail development which has a negative impact on the vitality and viability of designated centres should not be permitted.

Supplementary Planning Guidance Notes (SPGs); Supplementary Planning Documents (SPDs) and Planning Advice Notes (PAN)

- 1.63 Several relevant SPGs, SPD's and PANs have been published for Brighton and Hove. The aim of these supplementary papers is to provide planning and urban design guidance for different locations ear marketed for development within B&HCC. These SPD's are material considerations and can be taken into account when determining a planning application.

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SPD05: London Road Central Masterplan, December 2009

- 1.64 The masterplan seeks to make improvements to London Road to improve the area’s retail and commercial provision. Principally these improvements include enhancing the public realm through design solutions and investment to improve access within the area, as well as identifying sites for a range of retail of varying scales and affordable sites for local businesses.
- 1.65 The masterplan includes development options, including the option of a new square as part of the urban design for the Core Baker Street/Oxford Street Development Zone.

SPD01: Brighton Centre: Area Planning And Urban Design Framework, January 2005

- 1.66 Along with the Brighton Centre area, the site includes Churchill Square; The Grand Hotel; The Kingwest building; St Paul’s Church; The Metropole Hotel Complex; and Chartwell Court.
- 1.67 This SPD sets out the Council’s principal aim for a replacement facility for the existing Brighton Centre, to include a new convention centre, and provide guidance, on issues such as design, access and listed buildings, to inform development proposals that might come forward for the surrounding site area.

- 1.68 In terms of land use, the SPD states that:

“The Area has potential for new leisure, retail, hotel and residential development, subject to Local Plan Policy considerations.”

- 1.69 Any proposal for new retail development would need to accord with Policy SR1 of the Local Plan. In accordance with this policy, such a proposal should not have a detrimental impact on existing established centres.

SPD04: Edward Street Quarter, March 2006

- 1.70 The Edward Street Quarter, located close the Brighton’s Regional Centre, comprises a site of approximately 2.5 hectares north of Edward Street. The mixed use site is currently dominated by Amex House.
- 1.71 B&HCC are seeking to regenerate the Edward Street Quarter to provide an employment-led Scheme. The vision for the site incorporates a ‘campus-style’ format to maximise its employment potential, and we understand from the Council that the new AMEX building is currently under construction.

SPD05: Circus Street Municipal Market Site, March 2006

- 1.72 The 0.75 hectare site located close to Brighton Regional Centre, within a mixed use area, is presently occupied by the former municipal market building.
- 1.73 The Council vision for the site is for a redevelopment to create, *“an open, accessible and vibrant mixed-use area which maximises its employment, education and housing potential and acts as a model of urban and sustainability”*.

SPGBH 20: Brighton Marina, January 2003

- 1.74 Despite being rather dated, the adopted Supplementary Planning Guidance Note no.20 sets out a number of issues which are still relevant at Brighton Marina and establishes a broad development brief and urban design guide for the area.
- 1.75 The SPG identifies weaknesses with the existing marina development in line with key urban objectives. These weaknesses include inter alia, the lack of readily identifiable sense of place or sense of pride; difficult and indirect access to the sea; little co-ordination and

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integration of buildings and spaces; under use of key frontages and spaces; insufficient commercial mass to attract primary retailers and increased visitor numbers, low pedestrian activity; lack of a wide range of land uses; limited retail choice and office floorspace; impoverished townscape and floorspace; dull and uninviting setting and entrance; poorly defined routes (pedestrians and cyclists), uninviting hard landscaping; cluttered and uncoordinated signage; unattractive lighting, limited public transport use.

- 1.76 To improve the Brighton Marina, the SPG suggests ways in which new development could overcome the existing weaknesses of the destination. These include inter alia, the development of new built form to create a more defined and legible urban structure; introduce additional retail, leisure, office and residential floor space; increase the critical mass to increase activity and vitality; introduce landmark buildings and works of art; introduce buildings with active uses and frontages; introduce new building to help enclose spaces, provide visual interest and increase vitality to the spaces; introduce high quality hard landscaping relevant to the maritime setting; introduce co-ordinated signage strategy; improve connectivity to wide area and improve pedestrian priority; improve cycle links; and provide better public transport information and facilities to reduce car borne journeys.

PAN 04: Brighton Marina Masterplan (March 2008)

- 1.77 Alongside the SPG, the approved masterplan is intended to act as a supplement paper to SPGBH 20. The masterplan looks at the whole marina, including the Black Rock Site with the vision “to create a thriving sustainable community in a unique, high quality, attractive marina for residents, businesses and visitors.” It seeks to clarify the land uses, which should include:

- Marine related uses;
- Leisure uses - e.g. bowling alleys, cinema, leisure and sports centres, including at the Black Rock Site;
- Higher density residential and community uses - with commercial frontages at ground floor levels;
- Restaurants and retail uses - aimed to enhance the marina’s district centre role, with essential everyday shops and services such as banks, building society, post office, hairdresser, laundrette/dry cleaners etc; and
- Office, industrial and hotel uses - to provide additional employment, particularly at the Gasholder site. Light industrial, e.g. small scale workshops and boat repair is encouraged. A hotel may also be suitable to support the marina as a tourist destination.

Draft SPD Issues and Options: Brighton Marina, June 2008

- 1.78 The draft SPD was produced to ‘help shape the future of Brighton Marina’ by examining the issues facing Brighton Marina and exploring the options for its future development and regeneration.
- 1.79 The issues and options stage represents the initial stages of preparing the SPD for the Marina. It was produced as part of developing the Brighton Marina Masterplan, but has not been progressed.
- 1.80 The draft SPD, Issues and Options paper recognises that the marina currently has a rather mixed identity, with a variety of land uses and development forms. The absence of a planned approach throughout the different construction phases has meant the marina “has become characterised by piecemeal development and areas of poor public realm”.

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However, the SPD also recognises the potential for the marina as an important destination for housing, employment, retail, leisure and tourism if regenerated successfully.

Emerging Core Strategy

- 1.81 On 21 July 2011 B&HCC agreed to ask permission of the Secretary of the State to withdraw their Core Strategy Proposed Submission, published in February 2010, from the examination process. While the Submitted Core Strategy has not yet been withdrawn, it is expected that the formal process will commence once the Secretary of State directs B&HCC to do so.
- 1.82 Withdrawing the Submitted Core Strategy will allow the document to be revised and updated following a consultation, expected in autumn, on the parts of the plan requiring significant change. A more detailed timetable for the publication of the Core Strategy is expected to be available in September.
- 1.83 Until the document is officially withdrawn, the Core Strategy Proposed Submission (February 2010) will act as a material consideration to the development plan, albeit we consider that proposals for retail development must be determined in line with the existing development plan when considering the imminent withdrawal of this document. Once adopted the Core Strategy will replace the Local Plan and provide the overall strategic vision for the future of Brighton and Hove over an expected plan period to 2026.
- 1.84 As part of the Core Strategy Proposed Submission draft, the spatial vision sets out B&HCC's aspirations including *"major developments in the city, such as the replacement of the Brighton Centre, [which] will act as exemplars of modern design quality and sustainable building practice as well as support the wider regeneration of the city."*
- 1.85 Referring to B&HCC third strategic objective (SO3), the Council want to *"ensure that all major new development in the city supports the regeneration of the city, is located in sustainable locations, provides for the demands that it generates and is supported by the appropriate physical, social and environmental infrastructure"*. In addition, B&HCC plan to develop Brighton and Hove as a major centre on the South Coast for sustainable uses, including retail (SO12).
- 1.86 Policy CP15 protects the existing hierarchy of centres set out in the Local Plan. The policy notes that new centres, particularly local centres may come forward. These will be plan led, along with any changes to the boundary, role and status of a centre.
- 1.87 Policy CP15 also seeks to maintain Brighton Regional Centre as the focus for significant retail development. As such, proposals for retail within B&HCC defined shopping centres will be permitted subject to the consideration of scale and mix of uses. Applications for retail and edge and out of centre sites will be required to demonstrate the sequential and impact tests in accordance with PPS4.
- 1.88 Following the Council's spatial vision and strategic objective, its spatial strategy identifies seven broad areas where significant development should be directed. The strategy for these areas is identified under DA1-DA7. Development within these areas set out the Council's overarching spatial strategy for future development within brownfield land within built up areas of the city to 2026.
- 1.89 The seven areas are:
 - Brighton Centre and Churchill Square Area;
 - Brighton Marina, Gas Works and Black Rock Area;

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- Lewes Road Area;
- New England Quarter and London Road Area;
- Eastern Road and Edward Street Area;
- Hove Station Area; and
- Shoreham Harbour Area.

1.90 Of these locations, both the Brighton and Centre and Churchill Square, and Brighton Marina have been earmarked for indicative amounts of retail development. The strategy for the four remaining areas include mixed used development, comprising employment, residential and community schemes with improvements to the public realm, but where retail has not been identified as a part of a future scheme.

DA1: Brighton Centre and Churchill Square Area

1.91 Through the redevelopment of this area, the indicative minimum amount of comparison retail floorspace proposed is 20,000 sq m. It is expected that the allocation for this area will also include a conference centre, hotel and new leisure facilities, including a cinema.

DA2: Brighton Marina, Gas Works and Black Rock Area

- 1.92 The proposed strategic allocation for the Brighton Marina Inner Harbour is for a mixed use development, to co-operate 5,000 sq m of additional retail including Class A1-A5 uses. It is expected that this floorspace will be for comparison retail. As part of the mixed use site, residential development and community facilities will also be included.
- 1.93 A SPD for the Brighton Marina and wider area, supported by a Public Realm Strategy for the Marina is expected. This will replace the existing Supplementary Planning Guidance (SPGBH20, 2003) and Planning Advice Note (PAN04, 2008) for Brighton Marina.
- 1.94 The Core Strategy Proposed Submission recognises Brighton Marina’s designation as a district centre, and maintains this designation in proposed Policy CP15. Despite this designation, the Core Strategy Proposed Submission notes that Brighton Marina “lacks the full range of shops and services found typically in District Shopping Centres”, as such the “strategy for the development area is to enhance the District Shopping Centre through the encouragement of mixed retail activity and improvements to the public realm.”
- 1.95 It is anticipated in the Core Strategy Proposed Submission that the former Gas Works and Black Rock site will be allocated in the Development Policies and Site Allocations DPD. The Black Rock site, to the west of Brighton Marina is identified in the Local Plan and SPG5 for development of a recreation and leisure facility. There are development opportunities to create better links between Brighton Marina to future development of the Gas Works site which is located to the north and currently cut off by the A259.

2.0 Qualitative Assessment

- 2.1 In these health checks we consider the vitality and viability of the principle centres in Brighton and Hove. These are:
- Brighton Regional Centre;
 - Hove Town Centre; and
 - London Road Town Centre.
- 2.2 The health checks also take account of the B&HCC's four district centres:
- Boundary Road/Station Road;
 - Lewes Road;
 - St James's Street; and
 - Brighton Marina.
- 2.3 The different tiers included within the hierarchy of centres are defined by PPS4 (Annex B).
- 2.4 In relation to city centres, of which Brighton Regional Centre is one, PPS4 states that:
- "City centres are the highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. Planning for the future of such areas can be achieved successfully through the use of area action plans, with masterplans or development briefs for particular sites."*
- 2.5 In relation to town centres, of which both Hove and London Road Town Centres are designated as, PPS4 states that:
- "Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area...In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability."*
- 2.6 In relation to district centres, of which there are four in B&HCC, PPS4 states that:
- "District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library."*
- 2.7 Our assessment draws on the performance indicators of town centre vitality and viability set out at Annex D of PPS4 (Town Centre Health Check Indicators). To support our analysis, we have drawn upon in-house data combined with observations from site visits, Experian Goad and other sources, such as the Valuation Office. References have also been made, where appropriate, to the health check assessment undertaken as part of the 2006 Retail Assessment.
- 2.8 It should be noted that any direct comparables on the existing diversity of uses with the 2006 Retail Assessment may be subject to possible inconsistencies caused by the variation in sources used. The 2006 Retail Assessment data was drawn from Experian GOAD surveys available at the time of writing, but do not follow the exact retail boundaries defined in the Local Plan. The health checks set out in this update are based on latest information provided by B&HCC from 2011, and are based on the Local Plan's defined retail boundaries. The results from the Council's health checks provide a more up to date account of the diversity of uses than the latest GOAD Experian reports which were surveyed in April-June 2010.

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- 2.9 The health check indicators considered as part of this report include:
- Diversity of main town centre uses;
 - The amount of retail, leisure and office floor space in edge of centre and out of centre locations;
 - The potential capacity for growth or change of centres within the network and opportunities for centres to expand or consolidate;
 - Retailer representation and intention to change representation;
 - Shopping rents;
 - The proportion of vacant street level property;
 - Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental);
 - Pedestrian flows;
 - Accessibility;
 - Customer and residents' views and behaviour;
 - Perception of safety and occurrence of crime; and
 - The state of the centre's environmental quality.
- 2.10 Included within B&HCC's retail hierarchy are 17 local centres. These health checks will also provide a broad commentary of the overall health and vitality of these local centres. In relation to local centres PPS4 (Annex B) states that:
- "Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette."*
- 2.11 PPS4 has introduced an additional health check indicator relating to land values. We are not aware of any specific data relating to trends in land values in town, district and local centres in the City. As a broader analysis of this health check indicator, we are aware that land values in the UK have fallen back considerably since their peak in mid-to-late 2007. Anecdotally, in some cases, land values have fallen by over 50%, reflecting weakening demand and commercial yield prospects. This trend will undoubtedly have impacts on Brighton & Hove City Council too, although it is not possible to comment in detail on any specific sites or locations.
- 2.12 Collectively, these indicators provide the framework within which a health check of the identified town centre or shopping destination can be undertaken. However, PPS4 recognises that none of the individual indicators provide a definitive picture of town centre health and performance. The value of the indicators derives from them being considered together.

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BRIGHTON REGIONAL CENTRE

Description of Centre

- 2.13 Brighton’s Regional Shopping Centre designation is identified in Policy SR4 in the Local Plan, 2005.
- 2.14 The Core Strategy Proposed Submission draft (February 2010) describes Brighton Regional Centre as containing the ‘key drivers of the local tourism, leisure and shopping economy’ and as being the heart of the cultural, retail and commercial core of the city.
- 2.15 The Core Strategy Proposed Submission draft also states that a long-term aspiration of the Council is to ‘secure the redevelopment of the Brighton Centre as a successful, high profile and sustainable conference centre’.
- 2.16 Brighton Regional Centre comprises several distinct areas, each with slightly different retail offers. These are discussed in the retailer representation section below.

Diversity of Main Town Centre Uses

- 2.17 According to health check data provided by B&HCC (2011), Brighton has a total of 165,908 sq m gross of retail floorspace¹, across 1,205 units.
- 2.18 The table below sets out the retail composition of Brighton by the number of units. This data is compared to the UK national averages taken from the latest GOAD report.

Table 2.1
Uses in Brighton Regional Centre by Units

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE (%)	VARIANCE (%)
Convenience	84	6.97	9.23	-2.26
Comparison	579	48.04	41.89	+6.15
Service/Food/Drink	460	38.17	34.78	+3.39
Vacant	82	6.80	12.92	-6.12
TOTAL	1,205			

Source: Brighton & Hove City Council, 2011. UK National Averages taken from Experian GOAD

- 2.19 Table 2.1 shows that there is a below national average representation of convenience outlets in Brighton Regional Centre (6.97% of the total floorspace falls below the national average by 2.26%). The convenience offer in Brighton comprises approximately 9,900 sq m gross of all retail floor space.
- 2.20 Comparison retail units account for approximately half of all the retail units in the regional centre. While the proportion of comparison retail outlets has declined since the 2006 Retail Assessment, current provision remains above the national average by approximately 6%. The reduction in comparison retail presence has been partly counter-balanced by an increase in service businesses.
- 2.21 The 2006 Retail Assessment identified an ‘under representation’ of department stores. At present, there is one department store in Brighton which is Debenhams in Churchill Square

¹ Retail floorspace includes existing convenience, comparison, services and any vacant shop units within a centre. It does not include miscellaneous floorspace which considers employment floorspace, such as offices and residential dwellings within a centre.

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Shopping Centre. While the current department store presence may be considered 'weak' for a centre of regional significance, Brighton is known for its strong independent and specialist retailer provision which creates an individual retail offer to attract shoppers.

- 2.22 Brighton Regional Centre's service sector, including food and drinking establishments, represents the second largest retail category and is above the national average. This sector contributes to Brighton's leisure and night-time economy. While we noted from our site visits that there is a cluster of service uses, notably bars and nightclubs, along Queen's Road and West Street, service provision is generally spread throughout the entire regional centre.
- 2.23 There has been a slight increase in the number of vacant units since the 2006 Retail Assessment, however the existing vacancy level of 82 units, remains comfortably below the national average by over 6%.

Retailer Representation

- 2.24 The level of retailer representation within a centre gives another indication of the strength of the centre. According to the Experian GOAD report, a multiple retailer is defined as being part of a network of 9 or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. A total of 31 national multipliers have been identified by GOAD as key attractors i.e. those retailers most likely to improve the consumer appeal of a centre. From the total of 31 multiple retailers, GOAD identifies that 28 of these retailers have a representation in Brighton (Experian GOAD, April 2010).
- 2.25 While GOAD map boundaries do differ from B&HCC's proposal plan maps, these 28 retailers are all present within Brighton's Regional Centre designated boundary.

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2.26 Table 2.2 shows Brighton’s multiple retailer representation. The number of each individual retailer has been updated by B&HCC to include stores only located within their designated boundary for Brighton’s Regional Centre. Table 2.2 shows that, while Brighton has a high level of multiple retailer representation, its lack of department stores is what reduces its proportion of key retailers.

Table 2.2

Key Multiple Retailers in Brighton Regional Centre defined by GOAD

KEY RETAILER	NO.	KEY RETAILER	NO.
Argos	1	Next	1
BhS	1	O2	2
Boots	1	Phones 4 U	3
Burton	1	Primark	1
Carphone Warehouse	1	River Island	1
Clarks	1	Sainsbury’s	2
Clintons	2	Superdrug	2
Debenhams	1	TK Maxx	1
Dorothy Perkins	1	Tesco	2
H & M	3	Topman	1
HMV	2	Topshop	1
House of Fraser	0	Vodafone	2
John Lewis	0	Waitrose	1
Marks & Spencer	1	Waterstones	1
New Look	1	WH Smith	1
		Wilkinsons	0

Source: Brighton and Hove Council, 2011 data; Key Multiple Retailers taken from GOAD Experian Report April 2010

- 2.27 Considering the total of all ‘multiple outlets’, the latest GOAD survey data shows that Brighton Regional Centre has a multiple retailer profile that is above the national average by almost 6% (35.94% compared to the national average of 30.49%).
- 2.28 Brighton Regional Centre is home to eight supermarkets including three Sainsbury’s stores, two Tesco stores, one Co-operative Food store, one Waitrose store and one M&S food store.
- 2.29 Brighton Regional Centre can be divided into several distinct areas, each with a slightly different retail offer. These areas were identified as ‘six shopping quarters’ in the 2006 Retail Assessment and a summary of their retail offer is set out below. Since the previous assessment, the general retail offer of these ‘quarters’ has not changed:
 - The Lanes/East Street/Dukes Lane – provides a good offer of restaurants and cafes – both independent and multiples (including Starbucks and Bella Italia) and also of high-end multiple comparison retailers (such as Reiss, Kurt Geiger, Hugo Boss and, Russell and Bromley) and independent retailers;
 - Churchill Square/Western Road (primary retail frontage) – this area offers a range of comparison retail including some higher end, mid-range and also budget retail units. Churchill Square shopping centre in particular is home to the majority of multiple

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retailers that would be expected to be found in a thriving town centre (including Dorothy Perkins, H&M, WHSmith, Urban Outfitters). The shopping centre has recently seen the opening of a Hollister and a Cocks store – both in late 2010. As you move along Western Road, the comparison retail offer tends to come mainly from mid to low-end budget stores. It should also be noted that there are also a number of public houses, restaurants and bars in this area;

- Western Road – the section of Western Road beyond Montpelier Road going towards Hove comprises the majority of the secondary retail frontage to the west of the main centre. The retail offer here is largely based on lower end comparison retail, some small-scale convenience retail (including a Sainsbury's Local and Premier) and service outlets such as banks, betting shops and fast-food;
- Queen's Road/West Street – pubs, bars and nightclubs are the dominant use and the area is the main focus of Brighton's evening economy. Unfortunately, this concentration of uses has created problems of violent crime and anti-social behaviour which the Council has identified as an issue to address in its emerging Core Strategy document;
- North Laine – this area is home to numerous independent retailers including some high-quality boutiques. There is a mixture of comparison, convenience and service units. Some streets within the North Laine area are pedestrianised which gives those streets a slightly different feel to other parts of the regional centre;
- North Street – while there has clearly been some investment in the larger retail units along North Street, there is little uniformity in the units found along the length of the road. As a result, there is a mixture of multiple comparison, convenience and service which sit alongside independent retailers. The retail offer ranges from higher-end e.g. Waterstones, White Stuff and Lom Bok to fairly low-end retailers such as 99p Stores, charity shops and numerous mobile phone stores. Interestingly, the higher-end retail offer is mainly concentrated to the east of North Street. As you move west, the retail offer declines.

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Retailer Demand

2.30 The level of demand to acquire additional floorspace from retail and service uses is another indication of a centre’s health. According to Focus there is a total of 54 retail and service businesses who have expressed a demand for floorspace within Brighton (Appendix D). As shown in Table 2.3, demand is strongest from the comparison retail sector, and the list of retailers requiring space includes All Saints; Ben Sherman; Kathmandu; 3 Mobile and The Card Factory. In relation to convenience retailers, both Greggs and Mr Bean Coffee House have expressed a demand. The second largest demand is for service uses, including food and drink businesses.

Table 2.3
Retail Demand for Brighton Regional Centre

CATEGORY	NO OF REQUIREMENTS	MINIMUM FLOORSPACE (SQ M GROSS)	MAXIMUM FLOORSPACE (SQ M GROSS)
Convenience	2	163	251
Comparison	39	4,102	6,508
Services/ Food/ Drink	13	1,672	3,154
Total	54	5,937	9,913

Source: Focus (2011)

Shopping Rents

2.31 The level of rent that retailers are prepared to pay for space in a centre is an indication of the perceived attractiveness of that centre. Rental values can also provide a measure of the primary of streets and locations within a centre. Table 2.4 shows the prime Zone A rental values achieved in Brighton Regional Centre and compares these to other nearby competing centres.

Table 2.4
Prime Retail Values

CENTRE	PRIME TOWN CENTRE RENTS: MID 2011 (£PSF ZONE A)	PRIME TOWN CENTRE RENTS: MID 2011 (RANK OUT OF 200, 1 = BEST)	PRIME TOWN CENTRE CHANGE: END 2008-MID 2011 (£PSF ZONE A)
Brighton	215	17	2.9
Crawley	110	79	-6.5
Eastbourne	100	89	-7.0
Horsham	90	114	-4.1
Tunbridge Wells	140	48	-3.4
Worthing	90	114	-9.3

Source: Promis, PMA Report (2011)

2.32 The data shows that out of the competing surrounding centres listed, Brighton achieves the best prime town centre rents. Furthermore, it is the only centre where rents have increased from the end of 2008.

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Prime Retail Yields

2.33 The commercial yield on a non-domestic property provides an indication of the confidence investors have in the long term profitability of the centre. However, both the Government and the Royal Institution of Chartered Surveyors have indicated this requires careful analysis and its limitations must be understood. Yields on property investment represent the return (in the form of rent) and capital to an investor. As property investments do not usually produce 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 expectations of the future retail growth prospects. Yields are therefore an indicator of expectations of the general economic prospects for a centre. The lower the yield the stronger the centre.

Table 2.5

Prime Retail Yields

CENTRE	PRIME TOWN CENTRE YIELDS: SPRING 2011 (%)	PRIME TOWN CENTRE YIELDS: SPRING 2011 (RANK OUT OF 200, 1 = BEST)	PRIME TOWN CENTRE YIELD SHIFT: AUTUMN 2010 - SPRING 2011 (% POINTS)
Brighton	5.25	9	-0.25
Crawley	6.75	112	0.00
Eastbourne	6.00	41	0.00
Horsham	6.75	112	0.00
Tunbridge Wells	6.00	41	-0.25
Worthing	6.50	67	0.00

Source: Promis, PMA Report (2011)

2.34 Of the competing centres listed, Brighton has the lowest yield, representing the strongest centre. Since autumn 2010 the prime retail yield of Brighton has decreased slightly, indicating an increase in investor confidence, albeit marginal.

Vacant Retail Property

- 2.35 The proportion of vacant street level property provides a strong indication of the health of town centres. It should however be used with a degree of caution as vacancies can arise even in the strongest town centre, particularly where properties are undergoing alterations or extensions.
- 2.36 According to Brighton & Hove City Council’s 2011 diversity of uses data, as set out in Table 2.1, Brighton Regional Centre has vacancy rates of 6.80%. This is below the national average of 12.92%. As can be expected with the declining economic market since 2006, the vacancy rate is slightly above that recorded in the 2006 Retail Assessment of 6.12% (based on 2005 Experian GOAD data).
- 2.37 Vacancy rates vary across the ‘shopping quarters’ that comprise Brighton Regional Centre. Generally, vacancy rates are lower in The Lanes/Dukes Lane/East Street area than other parts of the Regional Centre.

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Pedestrian Flow

- 2.38 Pedestrian flows were high across most parts of the Regional Centre. Generally, they were lower along the secondary retail frontage areas.
- 2.39 The main concentrations of footfall were along North Street, where the pavements were congested in parts, and close to The Lanes/East Street. West Street/Queen's Road was slightly quieter, however, that was largely due to the time of day the observation was made, i.e. mid-morning on a Monday.

Accessibility

- 2.40 Brighton Regional Centre benefits from good road and public transport accessibility. Brighton Railway Station is situated at the top of Queen's 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.
- 2.41 The regional centre is also well served by a number of bus routes, most of which stop at Churchill Square and along Western Road.
- 2.42 There is a park and ride scheme in operation (bus route 27) which starts from Tongdean Lane adjacent to the Withdean Sports Complex Car Park entrance and provides services to the regional centre (including Queen's Road, North Street, North Laine and Old Steine). Buses run every 15 minutes (Monday to Saturday daytimes) and every 30 minutes during the late evenings and on Sundays.
- 2.43 A Rapid Transport System is identified as a major transport priority for Brighton and Hove. It is described as a bus-based system that will enhance the public transport network to cater for increasing travel demand around the city.
- 2.44 Brighton Regional Centre is easily accessible by car from the north, west and east. 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 within the North Laine are pedestrianised. The North Laine also has restricted car access on Saturdays.
- 2.45 Generally, there is no on-street parking on the main shopping roads in Brighton Regional Centre and parking is mainly provided in car parks dotted around the regional centre which appeared to be well used when they were observed on the site visit.
- 2.46 As a 'Cycle Town', Brighton and Hove benefits from a cycle route network. Cycle routes provide access to the Regional Centre from the west, the east and the north.

Environmental Quality

- 2.47 As might be expected for a Regional Shopping Centre of its size, the environmental quality of Brighton varies greatly from one 'Shopping Quarter' to another. Parts of Western Road (particularly the secondary frontage), North Street (which is dominated by the Premier Inn building), and Queen's Street/West Street are of poor condition and lack character which detracts from the overall shopping experience and may impact on the type of retailers attracted to the area.
- 2.48 East Street/The Lanes/Dukes Lane and North Laine have very distinctive character. Both areas have streets that are pedestrianised. This immediately creates a more pleasant and relaxed shopping experience and also offers greater opportunities for high quality landscaping and street furniture.

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Conclusions and Recommendations

- 2.49 Overall, in consideration of PPS4's national indicators, Brighton Regional Centre is performing relatively well.
- 2.50 The distinctive nature of the different quarters of the centre provides a wide offer for both residents and visitors to the area which is a major strength of the centre. However, it is often difficult to navigate between the different quarters, partly due to poor signage, traffic flows, and congested pavements throughout the centre.
- 2.51 Some parts of the centre are dated and in poor condition and require some investment to ensure retailers continue to be attracted to the centre. North Street is the only 'quarter' which seems to lack an identity. In addition, the street scene along North Street, Western Road, and Queen's Road/West Street is also in need of updating and improvement.
- 2.52 Investment could take the form of new street furniture, potentially with styles to reflect the unique characters of the different 'quarters'. This would contribute to the sense of identity and provide a useful method for customers to navigate their way around the various 'quarters'.

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HOVE TOWN CENTRE

Description of Centre

- 2.53 Hove is in the south western portion of the city and lies approximately two miles to the west of Brighton Regional Centre. The primary shopping area runs along Church Road, along George Street and along a short stretch of Blatchington Road. The secondary shopping areas of Hove Town Centre and Brighton Regional Centre merge together although Palmeira Square acts as a transitional marker between the centres.
- 2.54 The emerging Core Strategy DPD identifies Hove Town Centre as falling near to Hove Station Area Development Area which is earmarked for significant regeneration during the plan period. The Core Strategy states that *'there is a poor public realm and poor quality streetscape in several areas due to a lack of defined street frontages particularly around the large retail sites'*.

Diversity of Main Town Centre Uses

- 2.55 Table 2.6 below provides a breakdown of the diversity of uses in Hove Town Centre.

Table 2.6

Uses in Hove Town Centre by Units

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE (%)	VARIANCE (%)
Convenience	26	7.30	9.23	-1.93
Comparison	106	29.8	41.89	-12.09
Service/Food/Drink	203	57.0	34.78	+22.22
Vacant	21	5.90	12.92	-7.02
TOTAL	356			

Source: Brighton & Hove City Council, 2011. UK National Averages taken from Experian GOAD

- 2.56 According to health check data provided by Brighton & Hove City Council (2011), 356 retail units comprise Hove Town Centre and provide a total of 43,879 sq m gross of retail floorspace.
- 2.57 Table 2.6 sets out the retail composition of Hove Town Centre by the number of units. This data is compared to the UK national averages taken from the latest GOAD report.
- 2.58 Hove Town Centre displays below national average in terms of convenience and comparison provision. The variance between Hove Town Centre’s comparison retail offer and the national average is most pronounced, and represents a percentage of over 12% below the national average. Convenience retail comprises 8,449 sq m gross while comparison retail accounts for 13,128 sq m gross of all retail floor space. This is a slight decrease on the amount of floorspace (approximately 1,000 sq m lower for both convenience and comparison floorspace) which was calculated as part of the 2006 Retail Assessment.
- 2.59 A concentration of comparison retail units anchor the pedestrianised area of George Street.
- 2.60 Service units represent the largest retail category in Hove Town Centre with over half (57%) of all units providing a service function. This is 22% above the national average and is an increase on the level of service units assessed as part of the 2006 Retail Assessment when service uses represented 45%.

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- 2.61 Generally, the service uses, including food and drink establishments, are concentrated in the secondary retail area of the Town Centre although many are also interspersed amongst the convenience and comparison units in the primary retail area – particularly along Church Road. The types of service uses found in the primary retail area include travel agents, estate agents, beauticians, restaurants, cafes, and barbers/hairdressers.
- 2.62 Hove Town Centre’s primary shopping frontage extends along Church Road from The Drive in the east and George Street in the west; and along George Street from Church Road in the south and Blatchington Road in the north. The centre’s primary frontage includes comparison retail units such as Peacocks and QS. The town centre also has three areas of secondary retail frontage. At both the eastern and western end of Church Road, the uses are predominantly taken up by independent service retailers including fast food, restaurants, accountants, estate agents and beauticians. The secondary retail frontage along Blatchington Road comprises both service units (including funeral directors, fast food outlets) and various charity shops).

Retailer Representation

- 2.63 From the total of 31 national multipliers identified by GOAD as key retailers in enhancing the appeal of a centre, B&HCC identify 12 retailers which are present within Hove’s designated Town Centre boundary.
- 2.64 Table 2.7 shows the 12 national retailers, which represents less than half of the total of key multipliers identified. While we are aware that the GOAD Experian Report (April 2010) also identifies a Sainsbury’s as a key multiple retailer, this store is not located within the town centre boundary and as such is not included.

Table 2.7

Key Multiple Retailers in Hove Town Centre defined by GOAD

KEY RETAILER	NO.	KEY RETAILER	NO.
Argos	0	Next	0
BhS	0	O2	1
Boots	3	Phones 4 U	1
Burton	0	Primark	0
Carphone Warehouse	1	River Island	0
Clarks	2	Sainsbury’s	0
Clintons	1	Superdrug	1
Debenhams	0	TK Maxx	0
Dorothy Perkins	1	Tesco	1
H & M	0	Topman	0
HMV	0	Topshop	0
House of Fraser	0	Vodafone	1
John Lewis	0	Waitrose	0
Marks & Spencer	0	Waterstones	0
New Look	1	WH Smith	1
		Wilkinsons	0

Source: Brighton and Hove Council, 2011 data; Key Multiple Retailers taken from GOAD Experian Report April 2010

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- 2.65 Considering the total of all ‘multiple outlets’, the latest GOAD survey data shows that Hove Town Centre has a multiple retailer profile that is largely in line with the national average. Multiple retailers tend to be located along George Street and include Dorothy Perkins, WHSmith, Boots, Clintons and New Look.
- 2.66 There is a Tesco store on Church Road, just beyond George Street, which is a relatively new large-scale convenience store of approximately 4,500 sq m gross. The store is technically edge of centre as it is not bounded by any retail frontage on the Council’s proposals map. We understand from BHCC that they are looking to include the Tesco as part of Hove Town Centre’s defined shopping frontage.
- 2.67 Other multiple convenience retailers found in Hove Town Centre include a small-scale top-up Co-operative Food along Church Road (within the primary retail frontage) which is approximately 380 sq m gross. A second Co-operative Food store is located along Blatchington Road (also within the primary retail frontage) which is a larger store of approximately 1,100 sq m gross and includes a cafe. There is also a small-scale Iceland store (approximately 650 sq m gross located along Blatchington Road. As you move westwards along Blatchington Road, the retail units become interspersed with residential uses.

Retailer Demand

- 2.68 There are four recorded retailer requirements on the Focus database for Hove Town Centre (Appendix D). Table 2.8 shows that of these four requirements, including one from Hatton Goldsmiths, a maximum of 635 sq m is required.

Table 2.8
Retail Demand for Hove Town Centre

CATEGORY	NO OF REQUIREMENTS	MINIMUM FLOORSPACE (SQ M GROSS)	MAXIMUM FLOORSPACE (SQ M GROSS)
Convenience	0	0	0
Comparison	2	143	307
Services/Food/Drink	2	167	325
Total	4	310	635

Source: Focus (2011)

Vacant Retail Property

- 2.69 Table 2.6 shows that vacancy rates in Hove Town Centre are at 5.9% (representing 21 units) which is well below the national vacancy average. The vacancy rate has reduced slightly from the previous study.
- 2.70 The main vacancies in Hove Town Centre are concentrated in the secondary retail area particularly towards the western end of Blatchington Road.

Pedestrian Flow

- 2.71 The main focus of pedestrian activity in Hove Town Centre is, perhaps unsurprisingly, along the main primary retail area on George Street which is pedestrianised.
- 2.72 Church Road had a fairly high pedestrian flow along its length particularly east of George Street. Only at the western end of Church Road did pedestrian movements significantly decrease.

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- 2.73 Along Blatchington Road, pedestrian movement was mainly focused around the section which falls within the primary retail area. Further along the road, footfall was limited.

Accessibility

- 2.74 Hove benefits from good car and public transport accessibility. The Town Centre lies on a main road (Church Road) between Brighton and Portslade enabling good east/west accessibility.
- 2.75 Hove Railway Station, is situated north of the town centre and is linked to the West Coastway line from Brighton and the *Cliftonville Curve*, which connects the West Coastway route with the Brighton Main Line. This link means the station is often used for interchange between Brighton trains and those running to and from London Victoria via the Brighton Main Line.
- 2.76 There are several bus stops along both Church Road and Blatchington Road which serve a number of routes providing access to Brighton, Portslade, and Hangleton amongst others.

Environmental Quality

- 2.77 The retail frontage of Hove Town Centre is mainly organised on either side of two main roads. Generally, the pavements in front of the units are well maintained and uniform throughout. The street furniture, however, is limited and where it is provided it is dated and not very attractive, e.g. bicycle racks.
- 2.78 The primary retail frontage along George Street benefits from being in a pedestrianised street. This provides more opportunities for street furniture and areas of planting for example. A number of the cafes/restaurants located along George Street provide outdoor seating during fine weather which positively contributes to the atmosphere.
- 2.79 Although a number of the units within the secondary retail frontage along Church Road are dated, in the main, shop fronts in this section of the town centre are better maintained and are in better condition than those in the secondary retail frontage on Blatchington Road.

Conclusions and Recommendations

- 2.80 Hove Town Centre provides a particularly good mix of convenience and service retailers which provide shoppers with the products and services to meet their daily needs. Hove Town Centre is also known as a destination for its night time economy.
- 2.81 The town centre's main weakness is its poor offering of multiple comparison retailers particularly in the primary retail area along George Street.
- 2.82 Investment has clearly taken place in recent years as shown by the new Tesco store along Church Road and the pedestrianisation² of George Street. This pedestrianised area showed a healthy level of footfall at the time of the health check assessment.

² George Street has become largely pedestrianised throughout the day, although it does remain open to traffic in the early morning and evenings.

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LONDON ROAD TOWN CENTRE

Description of Centre

2.83 London Road is a linear shopping centre which lies to the north of Brighton Regional Centre. The emerging Core Strategy Development Plan Document (Proposed Submission version – February 2010) describes London Road Town Centre as a ‘community hub and key shopping centre for the surrounding residential areas and, with the city’s only permanent Open Market, offers affordable goods for those on lower incomes’. The Core Strategy also notes that its performance as a town centre has been in decline and there is a great need for regeneration and improvements.

Diversity of Main Town Centre Uses

2.84 A profile of the various uses found in the London Road Town Centre is shown in Table 2.9 below.

Table 2.9
Uses in London Road Town Centre by Unit

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE (%)	VARIANCE (%)
Convenience	24	9.40	9.23	+0.17
Comparison	69	27.10	41.89	-14.79
Service/Food/Drink	129	50.60	34.78	+15.82
Vacant	33	12.90	12.92	-0.02
TOTAL	255			

Source: Brighton & Hove City Council, 2011. UK National Averages taken from Experian GOAD

- 2.85 Table 2.9 shows that, like Hove Town Centre, service retailers comprise a significant proportion of retailers in London Road Town Centre at 50.60%. This compares to the national average of 34.78% and is an increase from the proportion reported in the 2006 Retail Assessment (based on Experian GOAD) when service retail units comprised 32.77% of all units. An analysis of figures from the 2006 Retail Assessment show that this increase in the service category has occurred in parallel with a decrease in vacant units.
- 2.86 Comparison units are under-represented in the town centre at 14.94% below the national average. This under-representation has increased since the 2006 Retail Assessment when comparison retail was approximately 10% below the national average.
- 2.87 Convenience retail categories in London Road Town Centre are broadly in line with the national average with a 0.17% variance in proportion.
- 2.88 The primary retail frontage of the town centre is made up of mid to low budget comparison shops (including Peacocks, Bon Marche and several charity shops) with some service retailer and a number of multiple and independent convenience retailers. Service retailers become more prevalent further north along London Road.
- 2.89 The southern end of London Road Town Centre comprises relatively low quality service retailers including pawnbrokers, barbers and fast-food. Some comparison uses can also be found at this end of the town centre including a bicycle shop, charity shops, and a pharmacy.

2.0 Qualitative Assessment

Retailer Representation

2.90 From a total of 31 key retailers identified by GOAD for enhancing the appeal of a centre, London Road Town Centre is occupied by 4 (B&HCC, 2011). As set out in Table 2.10, these key retailers present are Boots; Carphone Warehouse; and Superdrug. While we are aware that the GOAD Experian Report (April 2010) also identifies a Clintons and a Sainsbury’s as key multiple retailers, these stores are not located within the town centre boundary and as such is not included.

Table 2.10

Key Multiple Retailers in London Road Town Centre defined by GOAD

KEY RETAILER	NO.	KEY RETAILER	NO.
Argos	0	Next	0
BhS	0	O2	0
Boots	2	Phones 4 U	0
Burton	0	Primark	0
Carphone Warehouse	1	River Island	0
Clarks	0	Sainsbury’s	0
Clintons	0	Superdrug	1
Debenhams	0	TK Maxx	0
Dorothy Perkins	0	Tesco	0
H & M	0	Topman	0
HMV	0	Topshop	0
House of Fraser	0	Vodafone	0
John Lewis	0	Waitrose	0
Marks & Spencer	0	Waterstones	0
New Look	0	WH Smith	0
		Wilkinsons	0

Source: Brighton and Hove Council, 2011 data; Key Multiple Retailers taken from GOAD Experian Report April 2010

- 2.91 When considering the total of all ‘multiple outlets’, the latest GOAD survey data shows that London Road Town Centre has a representation almost 3% below the national average (27.60% compared to the national average of 30.49%).
- 2.92 The multiple retailers in the comparison category are under-represented in the London Road Town Centre. The data shows they comprise 47.54% of all multiple retailers compared to 53.69% at the national level. Boots, Superdrug and Clintons are among the ‘major retailers’ present in London Road Town Centre.
- 2.93 The Woolworths that used to occupy a unit along the western side of London Road is now a 99p Store.
- 2.94 There are several multiple convenience retailers along London Road including a large Co-operative Food store of approximately 2,000 sq m gross, a large Aldi of approximately 1,400 sq m gross and a small-scale Iceland of approximately 400 sq m gross.

2.0 Qualitative Assessment

Vacant Retail Property

- 2.95 Although vacancy rates in London Road Town Centre have reduced against the figures set out in the previous Retail Study, at 12.89%, the vacancy rate is the highest of all the town and district centres considered as part of this report.
- 2.96 While vacant units are fairly evenly spread throughout the town centre, there is a concentration in the secondary retail frontage at the southern end of London Road.

Pedestrian Flow

- 2.97 The pedestrian flow along London Road was fairly consistent along the length of the road although there was a higher concentration in the primary retail area – particularly around the multiple retailer outlets.
- 2.98 The secondary retail area to the north of London Road, along Preston Road, feels relatively isolated from the main primary retail area due to the busy road junction where London Road, Viaduct Road, New England Road, Preston Road and Beaconsfield Road. As a result, footfall noticeably reduces in this part of the Town Centre.

Accessibility

- 2.99 London Road benefits from good access to the main road network acting as the main road leading to the north out of Brighton.
- 2.100 There are a number of bus stops located along London Road and the bus routes that use London Road provide access to destinations including: Patcham, Hangleton and Brighton Regional Centre.
- 2.101 London Road is well served by public transport. London Road Railway Station, to the north of London Road itself, provides trains to Brighton and Lewes.

Environmental Quality

- 2.102 Generally, the buildings in London Road Town Centre are dated and in some cases in poor condition. The architectural style is mixed with flat-roofed 1960s buildings standing alongside early 20th century properties.
- 2.103 The street furniture and general streetscape is dated and inconsistent throughout the town centre. There is evidence of graffiti at various locations along London Road. There is also very little greenery apart from a few trees along the length of London Road which does little to soften the less attractive architecture.
- 2.104 Towards the northern end of London Road, just beyond Baker Street, there is a large building, formerly the Co-op department store, where there is currently a long stretch of inactive frontage on the eastern side. With this building standing vacant it creates a large gap in primary retail frontage of the town centre and detracts from a feel of continuity in the town centre.
- 2.105 London Road itself is a busy thoroughway both for traffic and pedestrians. Pedestrians have to rely on the pedestrian crossings to cross the road safely.

2.0 Qualitative Assessment

Conclusions and Recommendations

- 2.106 London Road Town Centre is a relatively busy centre. However, the quality of the shopping experience is not high and we consider that given its close proximity to Brighton Regional Centre and with good access via public transport, including its own railway station, it is not exploiting its full potential as a town centre shopping area.
- 2.107 The closure of the Co-op Department store, which was previously one of London Road's key anchor retailers, has resulted in a large area of vacant frontage on the north east end of the street.
- 2.108 The Council should look to enhance the retail provision, particularly for comparison goods which are currently under represented, by letting vacant units to new retailer tenants where possible, including at the former Co-op Department store building.
- 2.109 Investment to enhance the street scene would also improve the physical environment of the town centre and better linkages with the new Sainsbury's store on New England Street would improve pedestrian flow.

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BOUNDARY ROAD/STATION ROAD DISTRICT CENTRE

Description of Centre

- 2.110 Boundary Road/Station Road District Centre is located to the west of Hove Town Centre, in Portslade, close to the boundary edge of the local authority area. It is a linear centre stretching along Boundary Road and intersected by the railway line, New Church Road, and Portland Road.
- 2.111 The Proposed Submission version Core Strategy DPD identifies this District Centre as having a ‘strong budget retail offer’ and states that the Tesco Metro food store is trading strongly.

Diversity of Main Town Centre Uses

- 2.112 According to the survey of uses assessed by Brighton & Hove City Council (2011), Boundary Road/Station Road District Centre is home to 23,694 sq m gross of retail floorspace spread over a total of 165 units.

Table 2.11

Uses in Boundary Road/Station Road District Centre by Unit

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE (%)	VARIANCE (%)
Convenience	17	10.30	9.23	+1.07
Comparison	48	29.00	41.89	-12.89
Service	84	50.90	34.78	+16.12
Vacant	16	9.70	12.92	-3.22
TOTAL	165			

Source: Brighton & Hove City Council, 2011. UK National Averages taken from Experian GOAD

- 2.113 Table 2.11 shows that service businesses occupy 50.90% of all units in the Boundary Road/Station Road District Centre. This is above the national average of 34.78% and an increase from the 2006 Retail Assessment. As has been observed in other town centres across the city, this increase in service units has been the result of a decrease in the proportion of other retail categories rather than as a result of an increase in the number of overall units. In this case, both vacant units and comparison units have a reduced presence as a proportion all retail units in the District Centre.
- 2.114 Comparison retailers in the District Centre, having declined since the 2006 Retail Assessment, are now under-represented compared against the national average.
- 2.115 In terms of the convenience retail offer, Boundary Road/Station Road has an above national average representation by 1.07%.

Retailer Representation

- 2.116 No Experian GOAD survey report exists for Boundary Road/Station Road District Centre.
- 2.117 There are some multiple retailers represented in the primary retail area, including services uses such as Barclays and Natwest. Other service businesses in the primary retail area include betting shops and fast food outlets, some of which are independent outlets as well as some multiple chain outlets.

2.0 Qualitative Assessment

- 2.118 There are limited multiple comparison retailers within the primary retail area with the exception of Superdrug and Boots. Other comparison retailers within the district centre include QS, Peacocks and numerous charity shops.
- 2.119 In relation to convenience goods provision a key multiplier retailer within the primary shopping area is the 3,100 sq m gross Tesco Metro. There is also a small Premier convenience shop and a Londis within the primary shopping area. Further north along Boundary Road/Station Road, just outside the primary retail area, is a relatively new Aldi which is approximately 1,400 sq m gross. At the time the site visit was conducted (3.30pm on a Monday) the store was being well used.
- 2.120 At the southern end of the district centre, in the secondary retail area, retail uses are interspersed with residential units. Those retail units that are present tend to be service units, e.g. beauticians, a laundrette, a public house, pawnbrokers, and several fast food outlets, and small-scale convenience shops. There are also a number of specialist comparison retailers including an art shop and several electronics stores.
- 2.121 The secondary retail area at the northern end of the district centre is home to a number of public houses, a hairdresser, and an accountancy firm. In terms of comparison retail, there is a number of pet shops and DIY shops.

Vacant Retail Property

- 2.122 Table 2.11 shows that vacancy rates in the district centre are at 9.60%. This is broadly in line with the vacancy rates stated in the 2006 Retail Assessment and below the national average at 12.92%.
- 2.123 On publication of the previous Retail Study, the Boundary Road/Station Road District Centre was identified as having the highest vacancy rate compared to the other district centres across the City. The data provided by Brighton & Hove City Council from 2011 shows that this is no longer the case.

Pedestrian Flow

- 2.124 Throughout the primary retail area of the district centre, pedestrian flows were high with footfall on both sides of the road.
- 2.125 The southern retail area was relatively quiet which perhaps reflects the fact that there are residential uses interspersed with the retail units.

Accessibility

- 2.126 Boundary Road/Station Road is served by a number of bus routes which provide services to Churchill Square and Brighton Central Railway Station, amongst other places.
- 2.127 Portslade Railway Station (with trains running directly to London Victoria) is located to the far north of the district centre, again contributing 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.
- 2.128 Boundary Road is a particularly busy traffic route and the railway line often causes congestion when the level-crossing temporarily interrupts the flow of traffic. On-street parking with few restrictions is available on both sides of the road throughout the whole centre making stopping to access 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.

2.0 Qualitative Assessment

Environmental Quality

- 2.129 The environmental quality of the area could be improved – particularly the retail frontages and fascias many of which look out-dated and poorly maintained.
- 2.130 The streetscape is generally low quality and the existing street furniture is very basic and does little to enhance the environment. There is no greenery or planting along the length of the main shopping area which might help to improve the aesthetics of the high street.
- 2.131 Most retailers occupy purpose built retail units that are generally inconsistent in style and size. As a result the overall environment of the centre lacks any particular architectural/historic style.

Conclusions and Recommendations

- 2.132 The Boundary Road/Station Road District Centre provides an important functional centre for local people, in particular to access essential everyday goods and services. It would, however benefit from investment in order to improve the experience of those who already shop there and potentially also attract new shoppers and occupiers.
- 2.133 Investment in planting and the street scene along the length of the centre might help to create a more pleasant shopping atmosphere.
- 2.134 There is also some potential to improve the space immediately outside the railway station. Investment here to improve the public realm would encourage people to prolong their stay in the district centre.

2.0 Qualitative Assessment

LEWES ROAD DISTRICT CENTRE

Description of Centre

- 2.135 Lewes Road District Centre is located to the north east of Brighton Regional Centre. 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. This concentration of student accommodation is likely to be the result of the link Lewes Road provides between the university buildings to the north and the south of the centre.
- 2.136 Lewes Road (A270) is a busy main arterial road leading in and out of Brighton and 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.
- 2.137 Lewes Road District Centre is identified as a ‘potentially vulnerable centre’ by the Proposed Submission version Core Strategy DPD. The DPD goes on to state that ‘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... The centre forms a busy main arterial route leading in and out of Brighton and Hove and has a large walk-in catchment population.’

Diversity of Main Town Centre Uses

- 2.138 The profile of retail units in Lewes Road District Centre is set out in Table 2.12 below.

Table 2.12
Uses in Lewes Road District Centre by Unit

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE (%)	VARIANCE (%)
Convenience	15	14.40	9.23	+5.17
Comparison	16	15.40	41.89	-26.49
Service	62	59.60	34.78	+24.82
Vacant	11	10.60	12.92	-2.32
TOTAL	104			

Source: Brighton & Hove City Council, 2011. UK National Averages taken from Experian GOAD

- 2.139 According to data provided by Brighton & Hove City Council from their 2011 survey, the 104 units cover a floor area of 13,593 sq m gross.
- 2.140 Of the four district centres in Brighton & Hove, Lewes Road has the highest proportion of units occupied by service businesses – at nearly 60%. This is a significant increase on the proportion of service units recorded in 2006 Retail Assessment when service units accounted for 39% of all units. This increase has occurred against a backdrop of a reduction in the ‘convenience’ category during the same time period.
- 2.141 Comparison retailers are under-represented in Lewes Road District Centre with comparison units comprising 15.24% against a national average of 41.89%. In total comparison retailers account for 1,348 sq m gross of all retail floor space.
- 2.142 Conversely, convenience retailers are slightly above the national average with a variance of +5.17% and total floor space take of 3,632 sq m gross.

2.0 Qualitative Assessment

Retailer Representation

- 2.143 No Experian GOAD survey report exists for Lewes Road District Centre.
- 2.144 The primary retail frontage at the northern end of Lewes Road comprises a large Sainsbury's food store of approximately 2,100 sq m gross. The secondary retail area at the northern end of the district centre is made up of a range of uses including a petrol station, a KwikFit, a public house and a funeral director.
- 2.145 The main part of the primary retail area beyond the Vogue Gyratory. Units are dominated by service businesses, particularly estate agents. The few comparison retailers that are present sell new and used electronic goods and second-hand furniture.
- 2.146 Within the central part of the district centre a number of multiple convenience retailers are represented including a Spar (approximately 170 sq m gross) and a Co-operative Food store (approximately 450 sq m gross).
- 2.147 There are a number of sandwich shops located at throughout the district centre, restaurants and take-away outlets become more numerous moving south into the secondary retail frontage of the district centre. The majority of these tend to be independent outlets.
- 2.148 The secondary retail area in the southern portion of the district centre provides mainly service units such as a post office, a student accommodation office, estate agents and take-away outlets. Second-hand furniture stores were also evident.
- 2.149 The site visit highlighted that the majority of retailers in the district centre are independent businesses. This is also confirmed by the diversity of uses data provided by Brighton & Hove City Council (2011).

Vacant Retail Property

- 2.150 Table 2.10 shows that vacancy levels in the district centre are at 10.48% which is a reduction on the levels recorded in the 2006 Retail Assessment. Although this is just below the national average of 12.92%, it is among the highest of Brighton & Hove's four district centres – second only to Brighton Marina District Centre, and then only by 0.24%.

Pedestrian Flow

- 2.151 Pedestrian flow at the northern end of the district centre was low. This is perhaps symptomatic of the car-dominated environment at this end of Lewes Road. The Vogue Gyratory in particular makes pedestrian movement from Sainsbury's into the main portion of the district centre difficult and uninviting.
- 2.152 Pedestrian flow increases in the central part of the primary retail area but mainly on the western side of the street (as you look north). The main focus of this pedestrian flow was around the Co-operative foodstore – between Aberdeen Road and St Paul's Street.
- 2.153 Although pedestrian flow decreases slightly moving southward, it does remain steady – perhaps a result of a number of bus stops located in the secondary retail area and the short distance on reaching the Level open space to Brighton Regional Centre.

Accessibility

- 2.154 Lewes Road is served by approximately twenty regular bus services, running until around midnight throughout the week. The majority of bus routes travel the full length of Lewes Road serving both the prime and secondary retail frontages. There is no railway station

2.0 Qualitative Assessment

within the district centre – however, Moulsecoomb Railway Station is only a short walk to the north of the main shopping area and the Vogue Gyratory.

- 2.155 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.

Environmental Quality

- 2.156 The overall quality of this district centre is poor. The pavements are relatively narrow compared to the width of Lewes Road which increases the feeling that the shopping function of the District Centre is second to the throughway Lewes Road provided to traffic travelling north and south. The narrowness of the pavements also limits the ability of the cafes and restaurants to provide outdoor seating which would help to bring animation to the street scene.
- 2.157 A number of the buildings along the length of Lewes Road are in poor condition and this detracts further from the quality of the shopping environment.
- 2.158 There is little street furniture of any note and bus stops along the length of Lewes Road result in blockages in pedestrian flow as people waiting for buses queue.
- 2.159 Some investment has been made in a new development adjacent to the Co-operative Food shop in the primary retail area. This is where the footfall is highest.

Conclusions and Recommendations

- 2.160 Although the Sainsbury’s food store at the northern end of Lewes Road provides an anchor store, the dominance of the road networks in this part of the district centre means that pedestrian flow is significantly reduced at this end of the centre. Traffic calming measures or improvements to pedestrian crossings to attract foot fall would be beneficial.
- 2.161 At present, as is noted above, the pavements along the length of Lewes Road, are narrow and do little to contribute to the shopping experience. They also limit the ability for the cafes and restaurants to offer outdoor seating in good weather and for the provision of additional street furniture that would potentially disrupt the pedestrian flow.
- 2.162 Lewes Road is recognised as being a link from Brighton Regional Centre to the city’s university buildings slightly beyond Lewes Road District Centre. However, the uses within the district centre do not exploit the potential that a significant resident and visiting student population might bring.

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ST JAMES STREET DISTRICT CENTRE

Description of Centre

- 2.163 St James’ Street is a traditional linear district centre. It is located adjacent to Brighton Regional Centre, stretching eastwards, parallel to the seafront. St James’ 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’ Street between New Steine/Devonshire Place and Rock Gardens.
- 2.164 The Proposed Submission version of the Core Strategy DPD states that ‘the centre has a good choice and range of service, convenience and comparison goods retailers with a number of quality specialist/niche retailers’.

Diversity of Main Town Centre Uses

- 2.165 Table 2.13 below provides a breakdown of the categories of retail units present in St James’s Street District Centre.

Table 2.13

Uses in St James’s Street District Centre by Unit

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE (%)	VARIANCE (%)
Convenience	18	15.94	9.23	+6.71
Comparison	31	27.43	41.89	-14.46
Service	53	46.90	34.78	+12.12
Vacant	11	9.73	12.92	-3.19
TOTAL	113			

Source: Brighton & Hove City Council, 2011. UK National Averages taken from Experian GOAD

- 2.166 The 113 retail units located in St James’s Street District Centre cover a total floorspace of 13,944 sq m gross.
- 2.167 As has been the case across all the centres in Brighton & Hove, St James’s Street District Centre has seen an increase in the proportion of service units. However, this increase has not been as pronounced as in other centres since the 2006 Retail Assessment.
- 2.168 Both convenience and comparison retail units have reduced in proportion since the 2006 Retail Assessment while vacancy rates have increased.
- 2.169 Convenience retail presence in the district centre is above the national average whilst comparison retailers are under-represented by approximately 14.46% against the national average.

Retailer Representation

- 2.170 No Experian GOAD survey report exists for St James Street District Centre.
- 2.171 Service units dominate the western end of the district centre. Uses include hairdressers, cafes and restaurants, betting shops, and estate agents. There are a number of convenience stores located along St James’s Street – these include both independent and multiple retailers. The largest of these convenience units is the Morrisons which is

2.0 Qualitative Assessment

approximately 2,600 sq m gross and the Tesco Express which provides approximately 450 sq m gross of 'top-up' convenience shopping.

- 2.172 There are very few multiple retailers along St James's Street. Those that are represented include Boots, Starbucks and Superdrug.
- 2.173 Comparison retailers tend to be independent businesses and offer a range of specialist goods including gift shops, jewellery, clothing, art and household goods.
- 2.174 Moving east along the primary retail frontage of St James's Street the number of cafes, bars and restaurants increases.
- 2.175 The secondary retail area towards the eastern end of St James's Street provides a mixture of different types of service businesses including estate agents, hairdressers, pawnbrokers, fast food outlets, locksmith, pharmacy and a range of small cafes.

Vacant Retail Property

- 2.176 As noted above, vacancy rates have increased in the St James's Street District Centre since the 2006 Retail Assessment. The vacant units do not appear to be concentrated in any one part of the District Centre but instead occur randomly along the length of St James's Street.
- 2.177 There are a total of 11 vacant properties within St James District Centre (BHCC, 2011). Two vacant units are located close to Superdrug, on either side of the junction with Dorset Gardens.
- 2.178 A further vacancy comprises a large unit at the entrance to St James's Street from Old Steine. At the time of our site visit, the unit was undergoing building works, and we understand from the Council that this unit is to be occupied by Sainsbury's.

Pedestrian Flow

- 2.179 The western portion of the district centre is the busiest part and footfall here is high. Footfall decreases moving eastwards along St James's Street.
- 2.180 The traffic flows along St James's Street occasionally hamper pedestrian flow in the busiest sections of the district centre.

Accessibility

- 2.181 St James's Street is a one way street for road traffic moving west to east. Parking along St James's Street is fairly limited with some parking bays available at the western end of the street and a car park behind the Morrisons further along
- 2.182 Several bus routes travel along St James's Street connecting the District Centre to a variety of destinations including Brighton Pier, Woodingdean, Rottingdean and Whitehawk.
- 2.183 St James's Street District Centre is within walking distance of Brighton Regional Centre and Brighton Central Railway Station.

Environmental Quality

- 2.184 The environmental quality along St James's Street is slightly inconsistent. Although the pavements are narrow, they are not out of proportion with the width of the street as a whole and as such this creates quite a traditional and relaxing retail setting.

2.0 Qualitative Assessment

- 2.185 The shop fronts along St James’s Street are generally in good condition and the street benefits from pleasant architectural styles (except for those vacant units adjacent to Superdrug).
- 2.186 There is a very pleasant area of open space opposite Devonshire Place in the eastern half of the district centre which provides a break in the buildings that line St James’s Street and has a pleasant vista of the sea.
- 2.187 St James’s Street does not have much in the way of greenery apart from a solitary tree here and there.

Conclusions and Recommendations

- 2.188 Overall, St James’s Street provides a vibrant retail destination both during the day and at night when the cafes, bars and restaurants attract custom.
- 2.189 Given the width of the pavements, the potential for additional street furniture is limited.
- 2.190 Investment in the public realm could enhance the district centre further, along with the removal of some parking bays that line the street in order to provide seating areas for the restaurants/cafes/street furniture.

2.0 Qualitative Assessment

BRIGHTON MARINA DISTRICT CENTRE

Description of Centre

- 2.191 Located on the waterfront to the east of Brighton Regional Centre, Brighton Marina is unique amongst Brighton and Hove district centres, with an entirely different character and built form and does not perform the role and function of a traditional centre. The district centre is dominated by a large Asda and includes some comparison retail and limited service uses in the adjoining Octagon and Village Square development. The historic district centre boundary does not include more recent adjacent development, such as the leisure uses, cinema, Waterfront development and the Black Rock site.
- 2.192 While the 2006 Retail Assessment concluded that *‘the Brighton Marina should lose its ‘District Centre’ designation, and instead have its own specific policy designation’*, this recommendation was not carried forward into the emerging Core Strategy DPD. The Core Strategy does however state that *‘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’*.
- 2.193 The adopted SPGBH 20 (January 2003), PAN 04 Brighton Marina Masterplan (March 2008) and draft SPD, Issues and Options (June 2008) for the marina also recognise the districts centres poor public realm, as set out in the Introduction of this report.

Diversity of Main Town Centre Uses

- 2.194 Table 2.14 below provides a breakdown of the composition of retail units located in Brighton Marina.

Table 2.14
Uses in Brighton Marina District Centre by Units

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE (%)	VARIANCE (%)
Convenience	2	7.14	9.23	-2.09
Comparison	10	35.71	41.89	-6.18
Service	13	46.43	34.78	+11.65
Vacant	3	10.72	12.92	-2.2
TOTAL	28			

Source: Brighton & Hove City Council, 2011. UK National Averages taken from Experian GOAD

- 2.195 With 28 retail units, Brighton Marina has by far the lowest number of units of all of the district centres across Brighton & Hove. The total retail floorspace at Brighton Marina is 11,535 sq m gross which is approximately 2,000 sq m gross less than both St James’s Street District Centre and Lewes Road District Centre. This floorspace figure shows that the retail units at Brighton Marina are far larger in size than those found in the more traditional district centres.
- 2.196 Service business representation has increased since the 2006 Retail Assessment but not to the extent seen in other district centres. In the time since the 2006 Retail Assessment, comparison retailers have decreased their presence in the district centre while the proportion of convenience retailers has slightly increased. Both the convenience and comparison retailer presence are slightly below the national average.

2.0 Qualitative Assessment

Retailer Representation

- 2.197 In accordance with the latest Experian GOAD report for Brighton Marina, there are no key national retailers present within the district centre. Our site visit, conducted in June 2011 confirms this. There are however an above average representation of 'multiple outlets' which considers all multiple retailers. The occupiers of Brighton Marina District Centre represent 42.59% compared to the national average of 30.46 (a variance of +12%).
- 2.198 The district centre is dominated by the large Asda convenience store which is approximately 6,570 sq m gross. This Asda store also has a 'George' section providing some comparison retail provision. Other comparison retailers such as Reebok, The Baggage Factory, shoe shops and furnishing shops are present.
- 2.199 Service units range from boat specialists, a dental practice and estate agents. There are very few bars/restaurants within the designated Brighton Marina District Centre, however the adjacent Waterfront development to the east of Brighton Marina, although not designated as part of the centre, provides a strong concentration of eating and drinking establishments.
- 2.200 Services that are noticeably absent from this district centre include banks, building societies, a post office, hair-dressers/barbers, and dry cleaning. This is a weakness that was noted in the 2006 Retail Assessment.

Vacant Retail Property

- 2.201 According to the latest data provided by Brighton & Hove City Council 2011, Brighton Marina has three vacant units.

Pedestrian Flow

- 2.202 At the time the site visit was conducted, the busiest part of the district centre was in and around Asda. There was little pedestrian flow around Marina Square, or the adjacent Waterfront development which caters more of the night time economy.

Accessibility

- 2.203 The main access to the marina is by road and dominated by car borne trips. The access and approach into the marina is extremely restricted with poor signage directing pedestrians where to go and poor public realm creating an unattractive and intimidating entrance into the marina area. Once within the marina area, movement between the different and unconnected areas of the marina remained dominated by the car, with limited pedestrian movement. A number of traffic calming measures have been introduced including widened pavements, pedestrianised areas, zebra crossings, traffic islands, and reduced speed limits. However these do not seem to have encouraged pedestrians into or around the marina.
- 2.204 Brighton Marina is served by a number of bus routes. However, only bus routes 7 and 21 provide regular daily services. Other bus routes to the Marina are less frequent and many only run on a Sunday. There is no railway station in close proximity to the Marina but there is a large free multi-storey car park.

Environmental Quality

- 2.205 The area surrounding Asda and the 'big box' uses to the south of Asda which are not within the district centre boundary (such as the David Lloyd Leisure Centre, Cineworld and the

2.0 Qualitative Assessment

Rendez Vous Casino), is not easily accessed by foot and not an attractive environment on the approach. Generally road traffic takes precedence over pedestrian traffic and creates an intimidating environment particularly for a pedestrian approaching the district centre from the west.

- 2.206 However, once within Marina Square the quality of the environment improves. The area is clear and well-maintained with pedestrianised areas. These areas also feature high quality street furniture and planting. The raised flower-beds in Marina Square make a very positive contribution to the general atmosphere.

Conclusions and Recommendations

- 2.207 This district centre has a very isolated feel compared to others in Brighton & Hove. The Draft Supplementary Planning Document (Issues and Options Version, 2008) highlights this as a challenge that needs to be addressed and states that *'different construction phases within the Marina have occurred without the benefit of a planned approach. Consequently, the Marina has become characterised by piecemeal development and areas of poor public realm'*. Future development at Brighton Marina will need to consider how it links to existing parts of the district centre and where possible improves the existing layout and situation.
- 2.208 The area surrounding Asda would benefit from improved pedestrian routes and better linkages to the areas to the remainder of the district centre to the east – including Marina Square and beyond to The Waterfront.
- 2.209 The large tract of derelict land to the west of Asda (known as the 'Black Rock' site) which was due to house Brighton's International Arena until such plans were put on hold in 2008, could help to create the right 'entrance' to Brighton Marina that it currently lacks. Priority should be given to bringing forward appropriate uses on this gateway site as this could provide stimulus for other investment and generate another 'destination' use to draw people to the district centre.
- 2.210 Although there is a reasonable amount of retail floorspace located within the district centre, the nature of the retail operators together with the lack of service uses create an environment that seems to function more as a retail outlet centre rather than a traditional district centre. The marina development as a whole is also dominated by large leisure uses and waterfront restaurants.

2.0 Qualitative Assessment

LOCAL CENTRES

- 2.211 There are 17 'Local Centres' identified in the retail hierarchy for Brighton and Hove, as set out in the Local Plan (2005). Many of these centres provide an important convenience source for local 'top-up' shopping.
- 2.212 The overall impression gained from the site visits undertaken (June 2011), was that these local centres are well used by the residential areas surrounding them although there were some local centres that seemed to be quieter than others. The local centres tend to provide the goods and services for day-to-day needs, as well as cafes and restaurants.
- 2.213 Convenience and service units tend to dominant the local centres. A number of the local centres do have some comparison retailers and in many cases these tend to be specialist retailers. For example, Seven Dials is home to several lighting shops and St George's Street, Kemp Town has a number of antique shops and is the location of a small flea market.
- 2.214 The majority of retailers found in the local centres are independent traders. One multiple retailer, in particular, was present in nearly all the local centres – Co-operative Food. These stores tend to be small and provide useful top-up convenience shopping.
- 2.215 Generally, vacancy levels in the local centres are low. Those centres with several vacant units include Whitehawk, Ladies Mile Road, Portland Road, Warren Way, Lustralls Vale and Longridge Avenue.
- 2.216 All of the local centres are accessible by private car and bus or are within walking distance of a bus route (although the frequency of bus services varies depending on the local centre). All of the local centres tend to provide parking provision – either in the form of small car parks set off the road (as in the case of Eldred Avenue) or on-street parking as is seen at Ladies Mile Road.
- 2.217 The environmental quality of the local centres varies greatly. In several of the local centres, enhancements could be made through investment in the street scene e.g. better maintained pavements and greenery/planting and in some cases wider pavements.

3.0 Quantitative Assessment

INTRODUCTION

- 3.1 In this section we examine the capacity for additional convenience and comparison floorspace in B&HCC. This quantitative assessment forms a key input into our consideration of the need for further retail floorspace in the local authority area over the forecast plan period to 2030. It is important to note that the ability to forecast retail capacity becomes less reliable over time. In accordance with PPS4, we have therefore assessed the need for additional convenience and comparison floorspace over 5 year periods, incorporating the test dates of 2011; 2016; 2021; 2026 and 2030. The convenience and comparison retail capacity tables accompanying this quantitative assessment are attached in Appendix B and C.

Key Assumptions

- 3.2 In undertaking the assessment of quantitative need (or capacity for new floorspace), the report makes a number of key assumptions:
- There are two main types of goods:
 - Convenience – day-to-day groceries
 - Comparison – less frequently purchased, often durable, goods
 - In the study area, each individual is forecast to spend a given amount per year on each of these types of goods
 - The market is currently in equilibrium. In other words, assuming current shopping patterns, there is enough floorspace to support available spend
 - The assessment relies on the assumption that capacity can arise through:
 - Population growth and growth in spend per person – more people with more money available to spend means that more floorspace is required
 - Improved market share – ‘clawing back’ expenditure
 - Addressing ‘overtrading’

The Study Area

- 3.3 The study area has been derived from the 2006 Retail Assessment. As part of this assessment, GVA Grimely have drawn a sensible geographical boundary for the retail study area, stretching from Brighton to East Grinstead/Crawley in the north, Hailsham in the east and Horsham/Billingshurst/Pulborough in the west. This study area was informed by the Regional Assessment commissioned by SEERA (2004) and local knowledge. The study area is set out in Appendix A.
- 3.4 The study area has been sub-divided into 12 zones in order to allow more fine-grained analysis. The study area and these individual zones are drawn around existing postcode sectors.
- 3.5 Pitney Bowes Business Insight (PBBI), formerly Map Info, have provided the current population of the study area and each of the zones within it. Population projections, also prepared by PBBI have then been used to grow the population over the plan period and for each of the forecast years (2016, 2021, 2026 and 2030). This is set out on the first page of the convenience and comparison retail capacity analysis at Appendix B and C respectively.

3.0 Quantitative Assessment

The Household Survey

- 3.6 In order to forecast retail floorspace capacity, quantitative assessments employ the results of a special household interview survey to provide information on the actual shopping patterns in the study area. Surveying a sample of residents in the study area provides a picture of the 'market share' of different stores and centres in the study area.
- 3.7 Our quantitative assessment revisits the 2006 Retail Assessment (GVA Grimely) and draws upon the results of the household telephone survey, undertaken in 2005. While we acknowledge that since this time some new stores have opened and some fascias have changed, we are broadly content that the household survey, as it stands, is robust to demonstrate capacity for the short to medium term. To forecast longer term capacity, we would recommend that a new household survey should be commissioned to plan for development in the latter half of the plan period.

CONVENIENCE GOODS

Capacity arising through increase in population and expenditure per person

- 3.8 Estimates of expenditure per capita on convenience goods are obtained from PBBi. This data is for 2008, and growth rate projections, also provided by PBBi, are used to estimate expenditure per capita in our base year of 2011, and our forecast years of 2016, 2021, 2026 and 2030. This is undertaken for each of the zones in the study area (see Table B1.1 in Appendix B).
- 3.9 The population of the study area is then multiplied by the forecast spend per person. This provides us with the total expenditure available to support spending on convenience goods (and therefore to support convenience retail floorspace). The product of this exercise is set out at Table B1.2 in Appendix B.
- 3.10 In summary, £988.8m is available across the study area in 2011, rising to £1,083.0m in 2021 and £1,178.6m in 2030.
- 3.11 The results of the household survey (2005) are then used to identify where people shop for convenience goods, and therefore the 'market share' of B&HCC as a whole. In doing so a composite market share is apportioned for convenience goods. This is a combination of the results of the responses to the questions on 'main food' shopping and 'top-up' shopping, weighted in favour of main food to reflect the fact that more money is generally spent on main food shopping trips than on top-up shopping.
- 3.12 The detailed market shares, derived from the 2005 household survey are summarised in Table B1.3 in Appendix B. The spending patterns they imply, and the market share of stores in B&HCC, are set out in Table B1.4. This quantitative analysis indicates that £460m of all available convenience expenditure in the whole study area is currently spent on trips to stores in B&HCC (including 'in centre stores' and 'out of centre stores').
- 3.13 The level of total available expenditure is then reduced to take account of 'Special Forms of Trading' (SFT), which considers the sales derived from web-based shopping. We follow the recommendation from Experian, who assume that half of all web-based shopping is sourced from stores, rather than from a warehouse, as many of the home delivery services operated by the leading supermarkets rely on in store 'shelf picking'.
- 3.14 When allowing for this SFT, the total available expenditure in the study area drops to £948.3m in 2011. Considering again that £460m of this available convenience expenditure is currently spent on trips to stores within B&HCC, this indicates that there is a

3.0 Quantitative Assessment

48.6% retention level ('market share') of available expenditure for convenience goods within Brighton & Hove.

- 3.15 Having made a reduction on available expenditure for SFT, we have then assumed a constant inflow in expenditure (2% of all expenditure) across the plan period to account principally for tourists' spending on convenience goods from beyond the catchment. This equates to an additional £9.4m in 2011. Accounting for this inflow of expenditure, the available expenditure in B&HCC totals £469.8m in 2011. Assuming a constant market share of 48.6%, and continued inflow of 2% of all expenditure, some £488.3m is available in B&HCC to 2016; £509.2m to 2021; £530.8m to 2026; and £551.3m to 2030.
- 3.16 After this, 'commitments' are identified and the anticipated turnover is calculated. This includes schemes completed and commenced but not accounted for in the 2006 Retail Assessment as well as consented developments that have not been implemented. The anticipated turnover of these commitments is worked out by multiplying the floorspace by the anticipated turnover for each store based on company averages. This is set out in Table B1.5 of Appendix B. It indicates that, in total, new convenience floorspace in B&HCC will turnover at some £45.8m. The turnover for completed and commenced developments (£16.0m) has been dropped into our base year of 2011, whereas the turnover for unimplemented developments (£29.9m) has been dropped in at our next forecast date of 2016. The commitments do not include planned schemes which do not have planning permission.
- 3.17 Turning to the examination of capacity, the analysis for B&HCC is set out at Table B1.6 of Appendix B. As noted above, it is assumed that in 2011 the market is in equilibrium, that is, there is enough floorspace to address available expenditure, and no more is required. Despite the growth in available expenditure created by the population projections and the growth in expenditure per capita, the turnover of existing committed floorspace absorbs more than the available capacity created when assuming a constant market share (48.6%) and making no account for overtrading. As such there is negative capacity for new convenience floorspace until 2026, when there is capacity to support 1,260 sq m of convenience floorspace, rising to 2,967 sq m of convenience floorspace in 2030. Table 3.1 sets out the capacity for convenience floorspace over the plan period.

Table 3.1
Capacity for new convenience floorspace (sq m net)

	2011	2016	2021	2026	2030
B&HCC Convenience Capacity	-1,325	-2,281	-534	1,260	2,967

Source: Table B1.6, Appendix B

- 3.18 In identifying capacity, no assumption has been made for an improvement in turnover efficiency of the existing convenience stores. Assuming an increase in store turnover by considering the potential for more efficient trading practices (such as longer opening hours and new merchandising techniques), would reduce the available capacity further. CBRE are concerned with the assumption relating to stores improving their sales density in future years. We consider that forecasts provided by Experian relating to floorspace efficiency can be exaggerated and conclude that any improvement in turnover efficiency of stores during the plan period will be accounted for in the B&HCC next quantitative assessment as overtrading.

3.0 Quantitative Assessment

Improved market share

- 3.19 If a study area's market share is low, it may be sensible to improve its market share or 'clawback' some of the residents' spending which is leaking to other locations. But this must be realistic; there is little prospect of clawing back expenditure if several large superstores lie outside but close to the edge of the study area.
- 3.20 Moreover, there must be some benefit in planning terms. Either the vitality and viability of an existing centre must improve as a result, or there would be need to be a reduction in unsustainable travel.
- 3.21 We consider that the level of expenditure within the whole study area which is captured by B&HCC's convenience floorspace to be healthy. From a wide study area, B&HCC capture nearly half of all available expenditure (48.6%). This is evidenced by the household survey which shows that a significant proportion of people living in zones 1 and 2 (relating most closely to B&HCC boundary) shop within these two zones for convenience goods. As such we do not consider it appropriate or justifiable to assume that B&HCC should absorb any more expenditure from the wider study area.

Overtrading

- 3.22 Overtrading means, in quantitative terms, that stores are trading above the average for the operator. If this overtrading is converted to floorspace, this can provide additional capacity. However, this needs to be backed up by 'on the ground', qualitative evidence of overtrading (such as long queues at checkouts, narrow or congested aisles and difficulties in keeping shelves full).
- 3.23 In Table B1.7 each of the largest stores in B&HCC and the extent to which they are trading above or below their company averages is examined. It is assumed that the turnover which is above the company average is available to support new floorspace. Those marked with a negative percentage are undertrading, and it is assumed in our assessment that they are capable of improving their turnover.
- 3.24 The level of over or undertrading which is identified in Table B1.7 has been calculated from data obtained from the 2005 household telephone survey. We note that since this survey the fascias of several stores has changed, most notably the takeover of former Somerfield units by Co-op, and the former Somerfield on St James Street which is now occupied by a Morrisons.
- 3.25 Our qualitative assessment of trading on the ground did not, in a number of cases reflect the quantitative level of trading of individual stores. The former Somerfield in St James Street for example appears to be significantly undertrading by -127.4% (£5.5m below the average company turnover). Considering, as above, that this Somerfield now trades as a Morrisons which has a higher company turnover, the level of undertrading would be even more acute (£12.9m below the average company turnover). Our visit to this store however has shown a very different picture, with evidence that the store is trading very well. This is seen 'on the ground' through large queues at the checkouts and a very overcrowded store.
- 3.26 Equally, there are stores that have been identified in the quantitative assessment as significantly overtrading, for example the Sainsbury's in London Road (overtrading by 49.4%, £17.4m above its company average), and the Sainsbury's in Lewes Road (overtrading by 35.9%, £15.1m above its company average). While evidence on the ground showed that these stores to be trading moderately well, we did not see evidence of the store overtrading to the level identified in our quantitative assessment.

3.0 Quantitative Assessment

3.27 In light of these inconsistencies, and particularly considering the change in operators since the 2006 Retail Assessment, we consider that assessing available capacity by reducing the significant overtrading of stores to their company averages would create an unrealistic level of available convenience floorspace. As such we have not assessed the capacity which would be available by accounting for overtrading. We consider, as per Table 3.1, that the capacity identified using the base line scenario is more realistic.

COMPARISON GOODS

Capacity arising through increase in population and expenditure per person

- 3.28 In assessing the capacity for comparison goods the same broad approach has been undertaken as for convenience goods.
- 3.29 Table C1.6 illustrates that the after deducting expenditure to take account of SFT, B&HCC retains £927.9m on comparison floorspace from the total available expenditure of £1,523.6m in the study area. This retention level equates to a market share of 60.9%.
- 3.30 In the same practice as the convenience assessment, we have assumed an inflow of 2% of all expenditure across the plan period to account for expenditure from outside the study area, principally from tourists. We assume this is a reasonable inflow for comparison goods in B&HCC given the widely drawn study area. This inflow equates to an additional £18.9m expenditure in 2011. Accounting for this inflow, the available expenditure for comparison floorspace in B&HCC totals £946.8m in 2011. Assuming a constant market share of 60.9%, some £1,046.6m is available in B&HCC to 2016; £1,097.8m to 2021; £1,150.8m to 2026; and £1,200.1m to 2030.
- 3.31 We then take account of all identified commitments (Table C1.5). Some £22.4m of expenditure is identified from completed and commenced commitments since the 2006 Retail Assessment, which we have dropped into the base year of 2011. A further £31.6m of expenditure is expected from unimplemented commitments. This has been dropped into our first forecast date of 2016, which along with completed and commenced commitment equates to a total of £54.03m of expenditure from 2016 onwards.
- 3.32 Assuming an 'equilibrium' in the base year (2011), there is negative capacity for additional comparison floorspace as a result of existing commitments. This negative capacity exists until 2016 as the available expenditure continues to be absorbed by committed comparison floorspace. Table 3.2 shows a summary of floorspace capacity when assuming a constant market share.

Table 3.2

Baseline Capacity for new comparison floorspace (sq m net) – Based on constant market share

	2011	2016	2021	2026	2030
B&HCC Comparison Capacity	-4,476	-4,049	-5,542	15,466	24,709

Source: Table C1.6, Appendix C

3.33 As with our comparison assessment, no allowance has been made for an improvement in turnover efficiency of existing comparison stores.

3.0 Quantitative Assessment

Improved market share

- 3.34 Given the relative isolation of Brighton Regional Centre from competing retail destinations, we consider that there is scope to model a small increase in market share from 60.9% to 70%.
- 3.35 While we did not increase the market share for convenience floorspace, it is considered that people generally travel further to higher order centres when they want a wider choice of shops. Brighton Regional Centre is therefore likely to be a more realistic prospect for delivering new floorspace, as it already has a greater range of shops.
- 3.36 The capacity created through the increase in market share reaches 25,259 sq m in 2016, rising across the plan period to 58,313 sq m in 2030, as per Table 3.3.

Table 3.3

Capacity for new comparison floorspace (sq m net) – Based on improved market share

	2011	2016	2021	2026	2030
B&HCC Comparison Capacity	-4,476	25,259	36,283	47,689	58,313

Source: Table C1.7, Appendix C

- 3.37 While we are aware that in increasing the market share we are assuming drawing trade from other areas, we do not consider that there will be any significant impact on any particular competing location due to Brighton’s wide Regional Centre draw which will account for a dispersed impact.

Overtrading

- 3.38 Any analysis of overtrading in the comparison goods sector must be a qualitative exercise, as it would be near impossible to model shopping patterns and implied spend against company averages. Overtrading is not, therefore, dealt with further at this stage.

4.0 Recommendations and Conclusions

- 4.1 In commissioning this study the Council requested that a number of matters be addressed. The work in the previous sections addresses these matters, and we set out below our conclusions on each.

QUANTITATIVE CAPACITY FOR NEW RETAIL FLOORSPACE

- 4.2 The study has examined the capacity for additional retail floorspace at 2016, 2021, 2026 and 2030. In doing so it takes into account projected population growth, projected increases in expenditure and changes in the proportion of shopping undertaken online.
- 4.3 Our quantitative assessment draws upon the results of the previous household survey, undertaken in 2005. While we are broadly content that the household survey, as it stands, is robust to demonstrate capacity for the short to medium term. To forecast longer term capacity, we would recommend that a new household survey should be commissioned to plan for development in the latter half of the plan period.

Convenience goods

- 4.4 In the convenience goods sector, based on constant market shares and not allowing for overtrading, we have not identified capacity for additional convenience goods floorspace up to 2021. Indeed, once current commitments are taken into account, there is an oversupply of floorspace within B&HCC.
- 4.5 The table below provides a summary of the level of convenience floorspace available at each test year.

Table 4.1
Brighton and Hove City Council wide convenience capacity

PERIOD	NET SALES FLOORSPACE (SQ M NET)
2011-2016	-2,281
2011-2021	-534
2011-2026	1,260
2011-2030	2,967

Source: Table B1.6, Appendix B

- 4.6 Further analysis reveals that, in quantitative terms, a number of stores in B&HCC are trading well above company average, albeit there are also some stores that are trading below their company average. We acknowledge that if this overtrading is addressed, capacity for new floorspace will arise. However, we consider that there is not enough actual qualitative evidence of overtrading on the ground to model convenience capacity based on reducing the quantitative levels of overtrading to company averages. With the exception of the Morrisons (former Somerfield) in St James Street District Centre, close to the regional centre.
- 4.7 As such we consider the base line capacity, summarised in Table 4.1, is more realistic, and that in the short to medium term there is no capacity for additional convenience floorspace. Taking into account the inconsistencies between the quantitative and qualitative evidence of overtrading and the change in operators of some stores since the previous study, we consider that B&HCC should re-visit this through a further review of retail capacity at a later date.

4.0 Recommendations and Conclusions

- 4.8 Turning to market share, B&HCC already captures nearly half of all available expenditure from the study area already and therefore has a healthy convenience market share. We therefore do not consider that there is a case for seeking to improve it.

COMPARISON GOODS

- 4.9 In the comparison goods sector B&HCC captures 60% of all available expenditure in the study area. When this market share is maintained we anticipate that there is an oversupply of comparison floorspace in the immediate term due largely to new commitments. In the longer-term we anticipate that there will be some capacity for new floorspace: some 5,542 sq m net by 2021 and 15,466 sq m by 2026.
- 4.10 If B&HCC were to seek an increase in market share there is potential capacity for additional retail floorspace. We have modelled a market share of 70% in order to secure Brighton’s position as a regional centre. This is based on an assumption that the City would attract more shoppers through an enhanced retail offer in Brighton Regional Centre and elsewhere. In our view, particularly given the relative isolation of Brighton Regional Centre from competing retail destinations and based on the improvements and scale of development proposed, there is scope to increase the current level of retention. We consider, however, that seeking to increase the market share beyond 70% would be an ambitious target.
- 4.11 Table 4.2 provides a summary of the level of comparison floorspace available at each test year using the increased retention scenario.

Table 4.2
Brighton and Hove City Council wide comparison capacity

PERIOD	NET SALES FLOORSPACE (SQ M NET)
2011-2016	25,259
2011-2021	36,283
2011-2026	47,689
2011-2030	58,313

Source: Table C1.7, Appendix C

PROSPECTS FOR MEETING THE NEED

- 4.12 Potential development sites do exist within B&HCC, although our health checks of each centre have not identified any additional sites not already considered for development through the Council’s emerging LDF.
- 4.13 In accordance with the guidance set out in PPS4, any new retail development should be directed into designated centres as a priority. Only then should edge-of-centre, followed by out-of-centre, sites be considered. As part of the plan making process any proposals, regardless of location, should be subject to the full rigours of PPS4 and the associated impact tests.

Convenience floorspace

- 4.14 Our quantitative assessment identifies no capacity for additional convenience floorspace in the short to medium term. In light of this we do not consider that there is any requirement for B&HCC to plan for additional convenience retail within their LDF or to allocate sites for convenience floorspace as part of their site allocations DPD.

4.0 Recommendations and Conclusions

- 4.15 It is important however to note that PPS4 no longer requires applicants to demonstrate need as part of their proposals for additional retail development. We therefore acknowledge that future applications for convenience retail development may arise, and these applications will need to be determined on their own merits and how they satisfy the sequential and impact tests of PPS4.
- 4.16 While we do not consider there to be a quantitative need for convenience floorspace, our health checks have identified a potential qualitative deficiency through the significant overtrading of the Morrisons store (former Somerfield). The overtrading of this store could be partially remedied by new committed floorspace in, or close to that centre. This would need to be subject to an assessment of impact in accordance with PPS4.
- 4.17 As part of our health checks we identified a large vacant unit under construction on the corner of St James Street and Old Steine, and we understand that this unit has now been fitted out and is occupied by a Sainsbury's Local store. We consider that the opening of this Sainsbury's Local will ease the pressure of the overtrading on the nearby Morrisons to some extent, although in reality they serve slightly different functions.

Comparison floorspace

- 4.18 For comparison floorspace we consider that the B&HCC should plan for the capacity identified in Table 4.2. We recommend that the Council should continue to support the delivery of a scheme at the Brighton Centre and that this capacity should be directed into the redevelopment of this area which has been identified as part of B&HCC's Core Strategy Proposed Submission. Despite the imminent withdrawal of this Core Strategy, we consider that this site should be allocated in the Council's Site Allocations DPD. To ensure the future development of the Brighton Centre and possible extension to the prime retail frontage boundary to include this area, we consider that any application for additional comparison retail that would impact on the delivery of this development should not be permitted.
- 4.19 Applications for additional comparison retail should be determined on their demonstration to satisfy the tests of PPS4, and on their impact on the delivery of the Brighton Centre.

POTENTIAL RETAIL HIERARCHY

- 4.20 As well as considering B&HCCs existing retail hierarchy, officers have asked us to advise on the status of the undesignated, out-of-centre Hollingbury Retail Park and Goldstone Retail Park, and consider whether these should be designated as new centres.
- 4.21 The Hollingbury Retail Park, located south of the A27, comprises large warehouse units including an Asda superstore, the British Bookshop site, Matalan, Next and Asda. Similarly, the Goldstone Retail Park, located at the former site of the Goldstone ground off the Old Shoreham Road, Hove, is a destination of large retail warehouses units including Toys R Us, JJB Sports, Comet and DFS.
- 4.22 From our review of both out-of-centre retail parks, we do not recommend that B&HCC seek to designate either of these retail destinations as new centres. In line with PPS4's definition of town and district centres (included at paragraphs 2.5 and 2.6 of this report) Hollingbury and Goldstone Retail Parks are not of the appropriate scale, nor do they provide the required services to meet the needs of the catchment area in order to perform the role of a traditional town or district centre.
- 4.23 Considering the above, we remain broadly content with B&HCC's hierarchy of centre, with the exception of two recommendations:

4.0 Recommendations and Conclusions

1. On completion of the re-development of the Brighton Centre the Regional Shopping Centre boundary and prime retail frontage designation should be extended to include the retail elements of this scheme.
2. Given the role and function of Brighton Marina principally for leisure uses, the centre should lose its district centre designation. We consider that a separate policy(ies) could determine the future development of the marina.

ADVICE ON POLICIES THAT SHOULD BE APPLIED

4.24 We recommend that:

- No additional convenience retail floorspace needs to be planned for as part of the Core Strategy and no specific sites need to be allocated for convenience retail;
- Additional comparison floorspace, which is identified by increasing the market share of B&HCC in order to secure Brighton's position as a regional centre, should be planned for and sought in Brighton Regional Centre as part of the aspiration to re-develop the Brighton Centre;
- The prime retail frontage should be extended to include the retail elements of the Brighton Centre once it has been developed;
- The district centre designation of Brighton Marina should be removed and replaced by a site specific policy to manage the development and future uses;
- Existing policies relating to designated retail frontages and restricting the uses along retail frontages to a quantifiable percentage should be replaced by more flexible policies that restrict non retail uses in line with PPS4, where they may impact the vitality and viability of a centre.

4.25 In addition to the final bullet point, we recommend that, while B&HCC should determine applications on their own merits, and on a case by case basis, they should resist applications for changes of use that result in the loss of A1 retail within prime retail areas where they have an impact on the vitality and viability of the centre.

4.26 In recommending broad policy areas as part of the emerging LDF, we have been asked by officers to consider the number of convenience supermarket chains on the high street. In addressing concerns over multiple foodstore chains, we note that this is not a planning issue and the influx of chains within retail designated areas cannot be restricted in planning terms.

4.27 More generally, development management policies should reflect any qualitative issues identified within the centre health checks and encourage public realm improvements where required.

4.28 The potential impact of new floorspace should also be assessed before any sites are allocated or before permission is granted for new development.

CB Richard Ellis

September 2011

APPENDICES

A

Survey Area

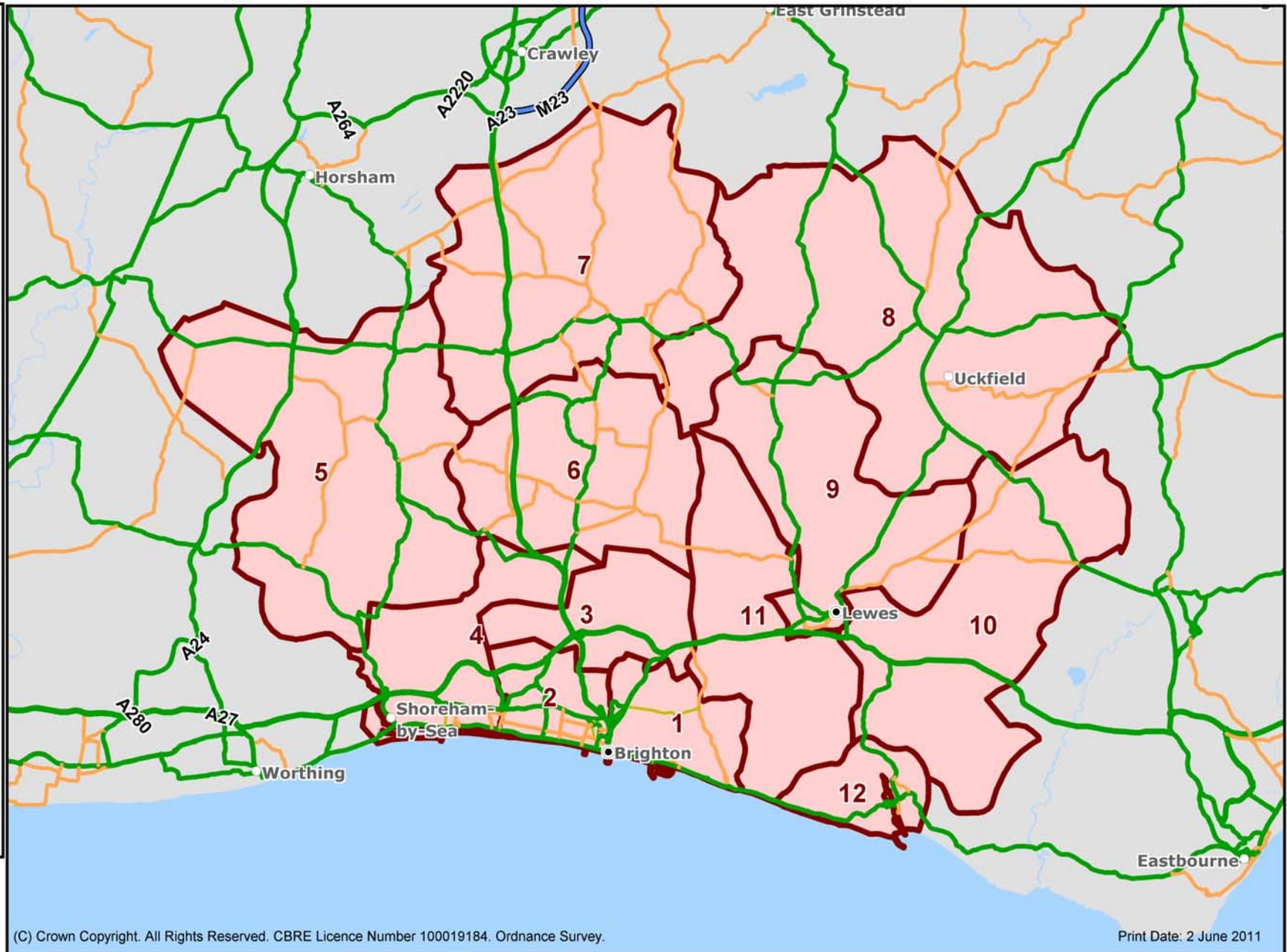
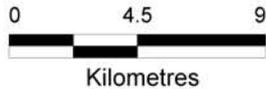
Brighton and Hove Retail Study Update 2011

Household Telephone Survey Area

Legend

 Brighton and Hove Study Area Zones

- Zone 1: BN2 0/1/3/4/5/6/7/9, BN1 7
- Zone 2: BN1 1/2/3/4/5/6, BN3 1/2/3/4/5/6/7/8
- Zone 3: BN1 8/9
- Zone 4: BN41 1/2, BN42 4, BN43 5/6, BN45 7
- Zone 5: BN5 9, BN44 3, RH13 8
- Zone 6: BN6 8/9, RH15 0/8/9
- Zone 7: RH16 1/2/3/4/5/6/
- Zone 8: RH17 7, TN22 1/2/3/4/5
- Zone 9: BN8 4/5, BN7 1/2
- Zone 10: BN8 6
- Zone 11: BN7 3, BN2 8
- Zone 12: BN9 0/9, BN10 7/8



B

Convenience Retail Capacity Tables

BRIGHTON & HOVE CITY COUNCIL

Project:

RETAIL STUDY UPDATE 2011

Latest Revision:

05/09/2011 - CONVENIENCE REATIL CAPACITY TABLES

Study area population by zone

Zone	Postcode Sector Groupings	2011	2016	2021	2026	2030
1	BN2 0/3/4/5/6/7/9; BN1 7	88,956	90,779	92,602	94,425	96,248
2	BN1 1/2/3/4/5/6; BN3 1/2/3/4/5/6/7/8	122,092	125,045	127,998	130,951	133,904
3	BN1 8/9	22,208	22,579	22,950	23,321	23,692
4	BN41 1/2; BN42 4; BN43 5/6; BN45 7	55,162	56,725	58,288	59,851	61,414
5	BN5 9; BN44 3; RH13 8	24,134	24,940	25,746	26,552	27,358
6	BN6 8/9; RH15 0/8/9	47,956	49,095	50,234	51,373	52,512
7	RH16 1/2/3/4; RH17 5/6	43,221	44,389	45,557	46,725	47,893
8	RH17 7; TN22 1/2/3/4/5	31,953	33,003	34,053	35,103	36,153
9	BN8 4/5; BN7 1/2	28,795	29,529	30,263	30,997	31,731
10	BN8 6	4,302	4,585	4,868	5,151	5,434
11	BN7 3; BN2 8	12,771	13,232	13,693	14,154	14,615
12	BN9 0/9; BN10 7/8	31,406	32,486	33,566	34,646	35,726
TOTAL		512,956	526,387	539,818	553,249	566,680

Sources/notes for frontispiece

1. Study area is based on 2006 Retail Study (GVA Grimley)
2. Population projections based on 2001 Census; 2011-2016 derived from Pitney Bowes Business Insight Area Profile Report (2 June 2011)
3. Population growth post 2016 assumed by CB Riichard Ellis, based on previous 5 year trend

CONVENIENCE GOODS

Table B1.1

Convenience expenditure per capita (£)

Zone	2008	2011	2016	2021	2026	2030
1	1,912	1,870	1,907	1,946	1,985	2,017
2	2,057	2,011	2,052	2,093	2,136	2,170
3	1,838	1,797	1,834	1,871	1,908	1,939
4	1,841	1,800	1,837	1,874	1,911	1,942
5	2,142	2,095	2,137	2,180	2,224	2,260
6	1,998	1,954	1,993	2,033	2,074	2,108
7	2,029	1,984	2,024	2,065	2,107	2,140
8	2,010	1,966	2,005	2,046	2,087	2,120
9	1,926	1,883	1,921	1,960	2,000	2,032
10	1,996	1,952	1,991	2,031	2,072	2,106
11	1,959	1,916	1,954	1,994	2,034	2,067
12	1,882	1,840	1,877	1,915	1,954	1,985

Sources/notes for Table B1.1

1. Expenditure data for 2008 from Pitney Bowes Business Insight Area Profile Report (2 June 2011)
2. Expenditure for 2010 is based on known decline in spend for 2007-2008 of -1.5% (Table 3.2 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide 2010/2011, September 2010), known decline in spend for 2008-2009 of -2.7% (Table 3.2 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide 2010/2011, September 2010) and forecast growth in expenditure for 2009-2010 of 0.1% (Table 3.4 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide 2010/2011, September 2010)
3. Expenditure for 2015 is based on forecast annual growth in expenditure of 0.4% (Table 3.4 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide 2010/2011, September 2010)
4. Expenditure for 2020 is based on forecast annual growth in expenditure of 0.4% (Table 3.4 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide 2010/2011, September 2010)
5. Expenditure for 2025 is based on CB Richard Ellis assumption that annual growth will continue at 0.4%

CONVENIENCE GOODS

Table B1.2

Total available expenditure (£m)

Zone	2011	2016	2021	2026	2030
1	166.32	173.15	180.19	187.44	194.13
2	245.59	256.60	267.95	279.66	290.57
3	39.91	41.40	42.93	44.50	45.94
4	99.31	104.18	109.21	114.40	119.27
5	50.55	53.29	56.12	59.05	61.82
6	93.70	97.85	102.14	106.57	110.68
7	85.75	89.85	94.07	98.43	102.51
8	62.80	66.18	69.66	73.25	76.66
9	54.23	56.74	59.32	61.98	64.47
10	8.40	9.13	9.89	10.67	11.44
11	24.46	25.86	27.30	28.79	30.20
12	57.80	60.99	64.29	67.70	70.93
TOTAL	988.82	1,035.21	1,083.07	1,132.43	1,178.63

Sources/notes for Table B1.2

1. Total available expenditure is product of population (frontispiece to tables) multiplied by expenditure per capita (Table B1.1)

CONVENIENCE GOODS
Table B1.3

In Centre Convenience Goods Allocation - Market shares (%)

Location of stores	Zone												
	1	2	3	4	5	6	7	8	9	10	11	12	
IN CENTRE STORES													
<i>Brighton Regional Centre</i>	4%	12%	5%	1%	0%	0%	0%	0%	0%	1%	4%	1%	
Waitrose, Western Road	1%	7%	3%	0%	0%	0%	0%	0%	0%	0%	2%	1%	
Marks & Spencer Foodhall	1%	3%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	
Other regional centre	2%	2%	2%	0%	0%	0%	0%	0%	0%	1%	0%	0%	
<i>Hove Town Centre</i>	2%	19%	0%	2%	2%	0%	0%	0%	0%	0%	1%	1%	
Co-op, Blatchington Road	0%	2%	1%	2%	0%	0%	0%	0%	0%	0%	0%	0%	
Iceland, Blatchington Road	0%	1%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	
Tesco superstore, Church Road	2%	17%	0%	1%	2%	0%	0%	0%	0%	0%	1%	1%	
Other town centre	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
<i>London Road Town Centre</i>	12%	8%	5%	1%	1%	1%	0%	2%	0%	1%	1%	0%	
Sainsbury's, London Road	7%	6%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	
Co-op, London Road	4%	1%	2%	0%	1%	1%	0%	0%	0%	0%	0%	0%	
Co-op, London Road	1%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	
Iceland, London Road	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Other town centre	0%	0%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	
<i>Lewes Road District Centre</i>	17%	5%	4%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Sainsbury's, Lewes Road	17%	5%	4%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Other district centre	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
<i>St James Street District Centre</i>	2%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	
Somerfield, St James Street	2%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	
Other district centre	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
<i>Boundary Road/Station Road District Centre</i>	0%	6%	0%	15%	0%	1%	0%	0%	0%	0%	0%	0%	
Tesco Metro, Station Road	0%	6%	0%	13%	0%	1%	0%	0%	0%	0%	0%	0%	
Other district centre	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	
<i>Brighton Marina District Centre</i>	24%	1%	0%	1%	0%	0%	1%	0%	0%	1%	28%	9%	
Asda, Brighton Marina	24%	1%	0%	1%	0%	0%	1%	0%	0%	1%	28%	9%	
<i>Local Centres</i>	4%	0%	8%	0%	0%	0%	0%	0%	0%	0%	1%	0%	
Co-op, Rottingdean	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Co-op, Lustrells Vale	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	
Co-op, Warren Road	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Co-op, Fiveways	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Tesco Express, Woodingdean	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Co-op, Carden Ave, Patcham	0%	0%	8%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
TOTAL	65%	51%	22%	20%	5%	2%	1%	2%	0%	3%	35%	11%	

Table B1.3 (contd)

Out of Centre Convenience Goods Allocation - Market shares (%)

Location of stores	Zone												
	1	2	3	4	5	6	7	8	9	10	11	12	
OUT OF CENTRE STORES													
Asda, Hollingbury	15%	7%	65%	4%	4%	1%	2%	0%	5%	1%	2%	2%	
Sainsbury's, Old Shoreham Road, West Hove	2%	19%	5%	23%	5%	0%	0%	0%	0%	0%	1%	0%	
Tesco Express, Dyke Road	0%	3%	0%	0%	2%	0%	0%	0%	1%	0%	0%	0%	
Tesco Express, The Droveaway	0%	2%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%	
Lidl, Arundel Road, Brighton	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	
Co-op, Nevill Road	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
TOTAL	17%	32%	70%	27%	11%	1%	2%	0%	7%	1%	3%	4%	

Table B1.3 (contd)

Outside Brighton and Hove - Convenience Goods Allocation - Market shares (%)

Location of stores	Zone											
	1	2	3	4	5	6	7	8	9	10	11	12
Stores outside Brighton and Hove	18%	17%	8%	53%	84%	97%	97%	98%	93%	96%	62%	85%

Sources/notes for Table B1.3

1. All market shares are sourced from household survey 2005
2. Market shares for stores outside study area assumed by CBRE.

CONVENIENCE GOODS
Table B1.4

In Centre Convenience Goods Allocation - Spending patterns 2011 (£m)

Location of stores	Zone												TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	
STORES IN CITY													
<i>Brighton Regional Centre</i>	6.65	29.47	2.00	0.99	0.00	0.00	0.00	0.00	0.00	0.08	0.98	0.58	40.75
Waitrose, Western Road	1.66	17.19	1.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.49	0.58	21.12
Marks & Spencer Foodhall	1.66	7.37	0.00	0.99	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	10.27
Other regional centre	3.33	4.91	0.80	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00	9.12
<i>Hove Town Centre</i>	3.33	46.66	0.00	1.99	1.01	0.00	0.00	0.00	0.00	0.00	0.24	0.58	53.81
Co-op, Blatchington Road	0.00	4.91	0.40	1.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.30
Iceland, Blatchington Road	0.00	2.46	0.00	0.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.45
Tesco superstore, Church Road	3.33	41.75	0.00	0.99	1.01	0.00	0.00	0.00	0.00	0.00	0.24	0.58	47.90
Other town centre	0.00	2.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.46
<i>London Road Town Centre</i>	19.96	19.65	2.00	0.99	0.51	0.94	0.00	1.26	0.00	0.08	0.24	0.00	45.62
Sainsbury's London Road	11.64	14.74	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	27.02
Co-op, London Road	6.65	2.46	0.80	0.00	0.51	0.94	0.00	0.00	0.00	0.00	0.00	0.00	11.35
Co-op, London Road	1.66	0.00	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00	2.15
Iceland, London Road	0.00	0.00	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.40
Other town centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.26	0.00	0.00	0.00	0.00	1.26
<i>Lewes Road District Centre</i>	28.27	12.28	1.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	42.15
Sainsbury's, Lewes Road	28.27	12.28	1.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	42.15
Other district centre	1.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.66
<i>St James Street District Centre</i>	3.33	0.00	0.00	0.00	1.01	0.00	4.34						
Somerfield, St James Street	3.33	0.00	0.00	0.00	1.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.34
Other district centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<i>Boundary Road/ Station Road District Centre</i>	0.00	14.74	0.00	14.90	0.00	0.94	0.00	0.00	0.00	0.00	0.00	0.00	30.57
Tesco Metro, Station Road	0.00	14.74	0.00	12.91	0.00	0.94	0.00	0.00	0.00	0.00	0.00	0.00	28.58
Other district centre	0.00	0.00	0.00	1.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.99
<i>Brighton Marina District Centre</i>	39.92	2.46	0.00	0.99	0.00	0.00	0.86	0.00	0.00	0.08	6.85	5.20	56.36
Asda, Brighton Marina	39.92	2.46	0.00	0.99	0.00	0.00	0.86	0.00	0.00	0.08	6.85	5.20	56.36
<i>Local Centres</i>	6.65	0.00	3.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	10.09
Co-op, Rottingdean	4.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.99
Co-op, Lustrells Vale	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	0.24
Co-op, Warren Road	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Fiveways	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Express, Woodingdean	1.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.66
Co-op, Carden Ave, Patcham	0.00	0.00	3.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.19
TOTAL	108.11	125.25	8.78	19.86	2.53	1.87	0.86	1.26	0.00	0.25	8.56	6.36	283.69

Table B1.4 (contd)

Out of Centre Convenience Goods Allocation - Spending patterns (£m)

Location of stores	Zone												TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	
OUT OF CENTRE STORES													
Asda, Hollingbury	24.95	17.19	25.94	3.97	2.02	0.94	1.72	0.00	2.71	0.08	0.49	1.16	81.17
Sainsbury's, Old Shoreham Road, West Hove	3.33	46.66	2.00	22.84	2.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	77.35
Tesco Express, Dyke Road	0.00	7.37	0.00	0.00	1.01	0.00	0.00	0.00	0.54	0.00	0.00	0.00	8.92
Tesco Express, The Droveaway	0.00	4.91	0.00	0.00	0.00	0.00	0.00	0.00	0.54	0.00	0.00	0.58	6.03
Lidl, Arundel Road, Brighton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.58	0.58
Co-op, Nevill Road	0.00	2.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.46
TOTAL	28.27	78.59	27.94	26.81	5.56	0.94	1.72	0.00	3.80	0.08	0.73	2.31	176.75

Table B1.4 (contd)

Outside Brighton and Hove - Convenience Goods Allocation - Market shares (£m)

Location of stores	Zone												TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	
Stores outside Brighton and Hove	29.94	41.75	3.19	52.63	42.46	90.88	83.18	61.55	50.44	8.06	15.17	49.13	528.38

Sources/notes for Table B1.4

1. Spending patterns are the product of available expenditure (Table B1.2) multiplied by market shares (Table B1.3)

CONVENIENCE AND COMPARISON GOODS COMMITMENTS
Table B1.5

Commitments

Application Ref	Proposed store or extension	Gross floorspace (sqm)	Net sales floorspace (sqm)	of which convenience floorspace (%)	Net convenience floorspace (sqm)	Estimated sales density (£/sqm)	Estimated turnover of convenience floorspace (£m)	of which comparison floorspace (%)	Net comparison floorspace (sqm)	Estimated sales density (£/sqm)	Estimated turnover of comparison floorspace (£m)
Completed Commitments from the 2006 Retail Assessment - not accounted for in 2005 Household Survey											
	North Street Quadrant	1,322	859	0%	-	-	-	100%	859	5,000	4.30
	Jubilee Street Scheme	1,744	1,134	0%	-	-	-	100%	1,134	5,000	5.67
Completed developments since the 2006 Retail Assessment											
	Tesco Express, St Jame's Street District Centre	372	298	100%	298	12,031	3.58	0%	-	-	-
	Iceland, Boundary Road/Station Road District Centre	489	391	100%	391	6,303	2.47	0%	-	-	-
	Sainsbury's Local, Portland Road, Hove	284	227	100%	227	11,540	2.62	0%	-	-	-
	Co-op, Hove Town Centre, Church Road	350	280	100%	280	6,734	1.89	0%	-	-	-
BH2006/01056	3 Storey Commercial mixed use building, Land west of Goldstone Retail Park,	424	339	0%	-	-	-	100%	339	3,000	1.02
BH2009/01163	Vintage Clothing Store, 100 North Road, Brighton	542	434	0%	-	-	-	100%	434	3,000	1.30
BH2008/03440	New Garden Centre, Former car showroom site, 7-17 Old Shoreham Road, Portslade	2,034	1,627	0%	-	-	-	100%	1,627	3,000	4.88
BH2007/00009	Lidl Foodstore Extension, Land at 53 Arundel Road, Brighton	426	421	100%	421	3,005	1.27	0%	-	-	-
BH2006/04000	Furniture Village Extension, 154 Old Shoreham Road, Hove	360	288	0%	-	-	-	100%	288	2,668	0.77
BH2009/01151	Curry's Mezzanine, 184-186 Old Shoreham Road, Hove	669	535	0%	-	-	-	100%	535	3,618	1.94
Commenced developments since the 2006 Retail Assessment											
BH2010/01757	New Foodstore (likely to be Sainsbury's) at former Public House, 189 Carden Avenue, Brighton	442	354	100%	354	11,540	4.08	0%	-	-	-
BH/2006/01124	Brighton Marina, Outer Harbour Development	1,303	782	0%	-	-	-	100%	782	3,210	2.51
Consented developments since the 2006 Retail Assessment - not yet implemented											
BH2009/00508	Asda Extension, Hollingbury	-	1,682	0%	-	-	-	100%	1,682	8,575	14.42
BH2008/00535	Sackville Road Development	-	4,466	59%	2,642	10,000	26.42	41%	1,824	5,000	9.12
BH2008/03894	Pets at Home, 274 Old Shoreham Road	981	929	0%	-	-	-	100%	929	2,161	1.60
BH2007/04363	Comet, Unit 4, Goldstone Retail Park, Old Shoreham Road	1,627	1,302	0%	-	-	-	100%	1,302	5,000	6.51
BH2011/01127	Change of use for Convenience Retail Store	-	350	100%	350	10,000	3.50	0%	-	-	-
TOTAL			16,697		4,963		45.82		11,735		54.03

Sources/notes for Table B1.5

- Where unknown, net floorspace assumed at a gross to net ratio of 80:20.
- Where unknown, convenience sales density assumed at £10,000 per sq m. Comparison sales density assumed at £5,000 per sq m for multiple retailers and £3,000 applied to independent retailers.
- Floorspace and sales density for North Street Quadrant and Jubilee Street Scheme derived from 2006 Retail Assessment, GVA.
- Tesco Express Turnover: £12,031 per sq m - CBRE Estimate, calculated at 2008 prices, from latest data from 'UK Food & Grocery Retailers 2010', Verdict
- Iceland Turnover: £6,303 per sq m - CBRE Estimate, calculated at 2008 prices, from latest data from 'UK Food & Grocery Retailers 2010', Verdict
- Sainsbury's Local Turnover: £11,540 per sq m - CBRE Estimate, calculated at 2008 prices, from latest data from 'UK Food & Grocery Retailers 2010', Verdict
- Co-op Turnover: £6,734 per sq m - CBRE Estimate, calculated at 2008 prices, from latest data from 'UK Food & Grocery Retailers 2010', Verdict.
- Lidl Turnover: £3,005 per sq m - CBRE Estimate, calculated at 2008 prices, from latest data from 'UK Food & Grocery Retailers 2010', Verdict.
- Furniture Village Turnover (£2,668 per sq m) derived from 'UK Furniture and Floorcovering Retailers 2010', Verdict.
- Curry's Extension Turnover (£3,618 per sq m) accounting for mezzanine floorspace, derived from applicants Retail Statement submitted as part of the planning application.
- Sainsbury's Convenience Turnover: £11,540 - CBRE Estimate, calculated at 2008 prices, from latest data from 'UK Food & Grocery Retailers 2010', Verdict.
- Brighton Marina, Outer Harbour Development Turnover (£3,210 per sq m) derived from planning application Planning Statement.
- Pets at Home Turnover (£2,161 per sq m), derived from the planning application. According to planning application Retail Statement, most Pets at Home turnover at 80% of this, therefore estimated turnover is £1.6m.

CONVENIENCE GOODS

Table B1.6

City-wide wide capacity (£m)

	2011	2016	2021	2026	2030
Expenditure retention (in store spending inc SFT shelf picking)					
Total available convenience expenditure in study area (exc SFT) (£m) ⁽¹⁾	948.3	985.5	1027.8	1071.3	1112.6
Market share of convenience floorspace in Brighton & Hove (%) ⁽²⁾	48.6%	48.6%	48.6%	48.6%	48.6%
Expenditure from study area retained by stores in Brighton & Hove (£m) ⁽³⁾	460.4	478.5	499.1	520.2	540.2
Expenditure inflow					
Estimated proportion of in store convenience turnover from beyond study area (%) ⁽⁴⁾	2.0%	2.0%	2.0%	2.0%	2.0%
Implied expenditure inflow to stores in Brighton & Hove (£m)	9.4	9.8	10.2	10.6	11.0
Total available expenditure					
Total available convenience expenditure in Brighton & Hove (£m) ⁽⁵⁾	469.8	488.3	509.2	530.8	551.3
Claims on expenditure					
Turnover of existing stores (£m) ⁽⁶⁾	469.8	469.8	469.8	469.8	469.8
Improvements in sales densities of existing stores (£m) ⁽⁷⁾	0.0	0.0	0.0	0.0	0.0
Turnover of convenience floorspace commitments (£m) ⁽⁸⁾	16	45.8	45.8	45.8	45.8
Residual expenditure					
Total residual expenditure available to support new convenience floorspace (£m) ⁽⁹⁾	-15.9	-27.4	-6.4	15.1	35.6
Estimated sales density of new convenience floorspace (£/sqm net) ⁽¹⁰⁾	12,000	12,000	12,000	12,000	12,000
Capacity					
Capacity for new convenience floorspace (sqm net) ⁽¹¹⁾	-1,325	-2,281	-534	1,260	2,967
Capacity for new convenience floorspace (sqm gross) ⁽¹²⁾	-1,893	-3,258	-763	1,800	4,239

Sources/notes for Table B1.6

1. Total available expenditure sourced from Table B1.2.
2. The spending patterns (Table 1.4) calculated from the 2005 household survey divided by the total available expenditure from the study area. The market share is held constant for future years.
3. Retained expenditure by stores within the Local Authority administrative boundary is sourced from Table B1.4. For future years it is calculated by multiplying the total available expenditure from the study area by the market share.
4. Proportion of in store convenience turnover from beyond study area is estimated by CB Richard Ellis. The proportion calculated is to principally account for tourism. Proportion of available expenditure from inflow is held constant in future years.
5. Total available expenditure is the sum of total available expenditure from the study area and inflow expenditure.
6. Turnover of existing stores (including shelf-picking from Internet sales) is equivalent to total available expenditure as the market is assumed to be in equilibrium.
7. We are concerned with the assumption and data related to stores increasing their sales density in future years with improvements arising from more efficient trading practices. We consider that data relating to floorspace efficiency can be optimistic. We therefore have not made an account for this.
8. Turnover of commitments is sourced from Table B1.5.
9. Total residual expenditure available to support new floorspace is the result of subtracting turnover of existing stores, expenditure diverted through an increase in SFT and turnover of commitments from total available expenditure.
10. Sales density of new convenience floorspace is estimated by CB Richard Ellis.
11. Capacity for new floorspace (net sales) is the result of dividing residual expenditure by estimated sales density.

CONVENIENCE GOODS

Table B1.7

Trading performance of major stores

Location of stores	Gross floorspace (sqm)	Net sales floorspace (sqm)	of which convenience floorspace (%)	Net convenience floorspace (sqm)	Estimated sales density (£/sqm)	Estimated company average turnover (£m)	Actual turnover (£m)	Overtrading (£m)	Overtrading (%)
STORES IN CITY									
<i>Brighton Regional Centre</i>									
Waitrose, Western Road		1103	95%	1,048	10603	11.1	21.1	10.0	47.4
Marks & Spencer Foodhall		836	95%	794	9867	7.8	10.3	2.4	23.7
<i>Hove Town Centre</i>									
Co-op, Blatchington Road		976	95%	927	6734	6.2	7.3	1.1	14.4
Tesco superstore, Church Road		3317	80%	2,654	12031	31.9	47.9	16.0	33.4
<i>London Road Town Centre</i>									
Sainsbury's London Road		1246	95%	1,184	11540	13.7	27.0	13.4	49.4
Co-op, London Road		1456	95%	1,383	6734	9.3	2.1	-7.2	-334.0
Co-op, London Road		808	95%	768	6734	5.2	2.1	-3.0	-140.8
<i>Lewes Road District Centre</i>									
Sainsbury's, Lewes Road		2925	80%	2,340	11540	27.0	42.2	15.1	35.9
<i>St James Street District Centre</i>									
Somerfield, St James Street		1542	95%	1,465	6734	9.9	4.3	-5.5	-127.4
<i>Boundary Road/ Station Road District Centre</i>									
Tesco Metro, Station Road		1868	95%	1,775	12031	21.4	28.6	7.2	25.3
<i>Brighton Marina District Centre</i>									
Asda, Brighton Marina		3966	70%	2,776	13133	36.5	56.4	19.9	35.3
OUT OF CENTRE STORES									
Asda, Hollingbury		6131	70%	4,292	13133	56.4	81.2	24.8	30.6
Sainsbury's, Old Shoreham Road, West Hove		5032	80%	4,026	11540	46.5	77.4	30.9	39.9
Lidl, Arundel Road, Brighton		578	100%	578	3005	1.7	0.6	-1.2	-200.5
Co-op, Nevill Road		1510	100%	1,510	6734	10.2	2.5	-7.7	-314.0
TOTAL								116.2	

Sources/notes for Table B1.7

1. Trading performance of largest convenience goods stores in Brighton and Hove City Council (Stores above 500 sq m).

C

Comparison Retail Capacity Tables

BRIGHTON & HOVE CITY COUNCIL

Project: RETAIL STUDY UPDATE 2011
 Latest Revision: 05/09/2011 - FINAL COMPARISON REATIL CAPACITY TABLES

Study area population by zone

Zone	Postcode Sector Groupings	2011	2016	2021	2026	2030
1	BN2 0/3/4/5/6/7/9; BN1 7	88,956	90,779	92,602	94,425	96,248
2	BN1 1/2/3/4/5/6; BN3 1/2/3/4/5/6/7/8	122,092	125,045	127,998	130,951	133,904
3	BN1 8/9	22,208	22,579	22,950	23,321	23,692
4	BN41 1/2; BN42 4; BN43 5/6; BN45 7	55,162	56,725	58,288	59,851	61,414
5	BN5 9; BN44 3; RH13 8	24,134	24,940	25,746	26,552	27,358
6	BN6 8/9; RH15 0/8/9	47,956	49,095	50,234	51,373	52,512
7	RH16 1/2/3/4; RH17 5/6	43,221	44,389	45,557	46,725	47,893
8	RH17 7; TN22 1/2/3/4/5	31,953	33,003	34,053	35,103	36,153
9	BN8 4/5; BN7 1/2	28,795	29,529	30,263	30,997	31,731
10	BN8 6	4,302	4,585	4,868	5,151	5,434
11	BN7 3; BN2 8	12,771	13,232	13,693	14,154	14,615
12	BN9 0/9; BN10 7/8	31,406	32,486	33,566	34,646	35,726
TOTAL		512,956	526,387	539,818	553,249	566,680

Sources/notes for frontispiece

1. Study area is based on 2006 Retail Study (GVA Grimley)
2. Population projections based on 2001 Census; 2011-2016 derived from Pitney Bowes Business Insight Area Profile Report (2 June 2011)
3. Population growth post 2016 assumed by CB Riichard Ellis, based on previous 5 year trend

COMPARISON GOODS

Table C1.1

Comparison expenditure per capita (£)

Zone	2008	2011	2016	2021	2026	2030
1	3,165	3,095	3,157	3,221	3,286	3,339
2	3,532	3,454	3,523	3,594	3,667	3,726
3	2,989	2,923	2,982	3,042	3,103	3,153
4	3,088	3,020	3,081	3,143	3,206	3,258
5	3,767	3,684	3,758	3,834	3,911	3,974
6	3,463	3,386	3,455	3,524	3,595	3,653
7	3,532	3,454	3,523	3,594	3,667	3,726
8	3,510	3,432	3,502	3,572	3,644	3,703
9	3,290	3,217	3,282	3,348	3,416	3,471
10	3,473	3,396	3,465	3,534	3,606	3,664
11	3,316	3,243	3,308	3,375	3,443	3,498
12	3,101	3,032	3,094	3,156	3,219	3,271

Sources/notes for Table C1.1

1. Expenditure data for 2008 from Pitney Bowes Business Insight Area Profile Report (2 June 2011)
2. Expenditure for 2010 is based on known decline in spend for 2007-2008 of -1.5% (Table 3.2 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide 2010/2011, September 2010), known decline in spend for 2008-2009 of -2.7% (Table 3.2 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide 2010/2011, September 2010) and forecast growth in expenditure for 2009-2010 of 0.1% (Table 3.4 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide 2010/2011, September 2010)
3. Expenditure for 2015 is based on forecast annual growth in expenditure of 0.4% (Table 3.4 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide 2010/2011, September 2010)
4. Expenditure for 2020 is based on forecast annual growth in expenditure of 0.4% (Table 3.4 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide 2010/2011, September 2010)
5. Expenditure for 2025 is based on CB Richard Ellis assumption that annual growth will continue at 0.4%

COMPARISON GOODS

Table C1.2

Total available expenditure (£m)

Zone	2011	2016	2021	2026	2030
1	275.31	286.62	298.27	310.28	321.36
2	421.69	440.59	460.09	480.19	498.93
3	64.91	67.33	69.81	72.37	74.70
4	166.57	174.74	183.18	191.88	200.06
5	88.90	93.72	98.70	103.84	108.72
6	162.40	169.61	177.04	184.70	191.84
7	149.28	156.40	163.75	171.34	178.45
8	109.67	115.56	121.64	127.92	133.87
9	92.64	96.92	101.33	105.88	110.13
10	14.61	15.89	17.21	18.57	19.91
11	41.41	43.77	46.21	48.73	51.13
12	95.23	100.50	105.93	111.54	116.87
TOTAL	1,682.62	1,761.64	1,843.16	1,927.25	2,005.95

Sources/notes for Table C1.2

1. Total available expenditure is product of population (frontispiece to tables) multiplied by expenditure per capita (Table C1.1)

COMPARISON GOODS

Table C1.3

In Centre Comparison Goods Allocation - Market shares (%)

Location of stores	Zone											
	1	2	3	4	5	6	7	8	9	10	11	12
IN CENTRE STORES												
Brighton Regional Centre	59%	57%	55%	33%	19%	23%	15%	8%	23%	19%	47%	34%
Hove Town Centre	1%	12%	2%	8%	0%	1%	0%	1%	0%	0%	1%	1%

Table C1.3 (contd)

Out of Centre Comparison Goods Allocation - Market shares (%)

Location of stores	Zone											
	1	2	3	4	5	6	7	8	9	10	11	12
OUT OF CENTRE STORES												
Hollingbury Industrial Estate	1%	0%	9%	1%	0%	0%	0%	0%	2%	0%	0%	0%
Pavilion Retail Park	16%	4%	12%	2%	2%	4%	1%	1%	4%	2%	5%	4%
Old Shoreham Road (Inc Goldstone)	0%	18%	5%	7%	2%	1%	0%	0%	0%	0%	0%	2%
Davigdor Road	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Table C1.3 (contd)

Outside Brighton & Hove Convenience Goods Allocation - Market shares (%)

Location of stores	Zone											
	1	2	3	4	5	6	7	8	9	10	11	12
Stores outside Brighton and Hove	23%	9%	17%	49%	77%	71%	84%	90%	71%	79%	47%	59%

Sources/notes for Table C1.3

1. All market shares are sourced from household survey 2005

COMPARISON GOODS

Table C1.4

In Centre Comparison Goods Allocation - Spending patterns 2011 (£m)

Location of stores	Zone												TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	
IN CENTRE STORES													
Brighton Regional Centre	162.44	240.36	35.70	54.97	16.89	37.35	22.39	8.77	21.31	2.78	19.46	32.38	654.80
Hove Town Centre	2.75	50.60	1.30	13.33	0.00	1.62	0.00	1.10	0.00	0.00	0.41	0.95	72.07
TOTAL	165.19	290.96	37.00	68.29	16.89	38.98	22.39	9.87	21.31	2.78	19.88	33.33	726.87

Table C1.4 (contd)

Out of Centre Comparison Goods Allocation - Spending patterns (£m)

Location of stores	Zone												TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	
STORES OUTSIDE CITY													
Hollingbury Industrial Estate	2.75	0.00	5.84	1.67	0.00	0.00	0.00	0.00	1.85	0.00	0.00	0.00	12.11
Pavilion Retail Park	44.05	16.87	7.79	3.33	1.78	6.50	1.49	1.10	3.71	0.29	2.07	3.81	92.78
Old Shoreham Road (Inc Goldstone)	0.00	75.90	3.25	11.66	1.78	1.62	0.00	0.00	0.00	0.00	0.00	1.90	96.12
Davigdor Road	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL	46.80	92.77	16.88	16.66	3.56	8.12	1.49	1.10	5.56	0.29	2.07	5.71	201.01

Table C1.4 (contd)

Outside Brighton & Hove Comparison Goods Allocation - Spending patterns (£m)

Location of stores	Zone												TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	
Stores outside Brighton and Hove	63.32	37.95	11.03	81.62	68.45	115.30	125.39	98.71	65.77	11.54	19.46	56.19	754.75

Sources/notes for Table C1.4

1. Spending patterns are the product of available expenditure (Table C1.2) multiplied by market shares (Table C1.3)

CONVENIENCE AND COMPARISON GOODS COMMITMENTS
Table C1.5

Commitments

Application Ref	Proposed store or extension	Gross floorspace (sqm)	Net sales floorspace (sqm)	of which convenience floorspace (%)	Net convenience floorspace (sqm)	Estimated sales density (£/sqm)	Estimated turnover of convenience floorspace (£m)	of which comparison floorspace (%)	Net comparison floorspace (sqm)	Estimated sales density (£/sqm)	Estimated turnover of comparison floorspace (£m)
Completed Commitments from the 2006 Retail Assessment - not accounted for in 2005 HouseHold Survey											
	North Street Quadrant	1,322	859	0%	-	-	-	100%	859	5,000	4.30
	Jubilee Street Scheme	1,744	1,134	0%	-	-	-	100%	1,134	5,000	5.67
Completed developments since the 2006 Retail Assessment											
	Tesco Express, St Jame's Street District Centre	372	298	100%	298	12,031	3.58	0%	-	-	-
	Iceland, Boundary Road/Station Road District Centre	489	391	100%	391	6,303	2.47	0%	-	-	-
	Sainsbury's Local, Portland Road, Hove	284	227	100%	227	11,540	2.62	0%	-	-	-
	Co-op, Hove Town Centre, Church Road	350	280	100%	280	6,734	1.89	0%	-	-	-
BH2006/01056	3 Storey Commercial mixed use building, Land west of Goldstone Retail Park,	424	339	0%	-	-	-	100%	339	3,000	1.02
BH2009/01163	Vintage Clothing Store, 100 North Road, Brighton	542	434	0%	-	-	-	100%	434	3,000	1.30
BH2008/03440	New Garden Centre, Former car showroom site, 7-17 Old Shoreham Road, Portslade	2,034	1,627	0%	-	-	-	100%	1,627	3,000	4.88
BH2007/00009	Lidl Foodstore Extension, Land at 53 Arundel Road, Brighton	426	421	100%	421	3,005	1.27	0%	-	-	-
BH2006/04000	Furniture Village Extension, 154 Old Shoreham Road, Hove	360	288	0%	-	-	-	100%	288	2,668	0.77
BH2009/01151	Curry's Mezzanine, 184-186 Old Shoreham Road, Hove	669	535	0%	-	-	-	100%	535	3,618	1.94
Commenced developments since the 2006 Retail Assessment											
BH2010/01757	New Foodstore (likely to be Sainsbury's) at former Public House, 189 Carden Avenue, Brighton	442	354	100%	354	11,540	4.08	0%	-	-	-
BH/2006/01124	Brighton Marina, Outer Harbour Development	1,303	782	0%	-	-	-	100%	782	3,210	2.51
Consented developments since the 2006 Retail Assessment - not yet implemented											
BH2009/00508	Asda Extension, Hellingbury	-	1,682	0%	-	-	-	100%	1,682	8,575	14.42
BH2008/00535	Sackville Road Development	-	4,466	59%	2,642	10,000	26.42	41%	1,824	5,000	9.12
BH2008/03894	Pets at Home, 274 Old Shoreham Road	981	929	0%	-	-	-	100%	929	2,161	1.60
BH2007/04363	Comet, Unit 4, Goldstone Retail Park, Old Shoreham Road	1,627	1,302	0%	-	-	-	100%	1,302	5,000	6.51
BH2011/01127	Change of use for Convenience Retail Store	-	350	100%	350	10,000	3.50	0%	-	-	-
TOTAL			16,697		4,963		45.82		11,735		54.03

Sources/notes for Table C1.5

- Where unknown, net floorspace assumed at a gross to net ratio of 80:20.
- Where unknown, convenience sales density assumed at £10,000 per sq m. Comparison sales density assumed at £5,000 per sq m for multiple retailers and £3,000 applied to independent retailers.
- Floorspace and sales density for North Street Quadrant and Jubilee Street Scheme derived from 2006 Retail Assessment, GVA.
- Tesco Express Turnover: £12,031 per sq m - CBRE Estimate, calculated at 2008 prices, from latest data from 'UK Food & Grocery Retailers 2010', Verdict
- Iceland Turnover: £6,303 per sq m - CBRE Estimate, calculated at 2008 prices, from latest data from 'UK Food & Grocery Retailers 2010', Verdict
- Sainsbury's Local Turnover: £11,540 per sq m - CBRE Estimate, calculated at 2008 prices, from latest data from 'UK Food & Grocery Retailers 2010', Verdict
- Co-op Turnover: £6,734 per sq m - CBRE Estimate, calculated at 2008 prices, from latest data from 'UK Food & Grocery Retailers 2010', Verdict.
- Lidl Turnover: £3,005 per sq m - CBRE Estimate, calculated at 2008 prices, from latest data from 'UK Food & Grocery Retailers 2010', Verdict.
- Furniture Village Turnover (£2,668 per sq m) derived from 'UK Furniture and Floorcovering Retailers 2010', Verdict.
- Curry's Extension Turnover (£3,618 per sq m) accounting for mezzanine floorspace, derived from applicants Retail Statement submitted as part of the planning application.
- Sainsbury's Convenience Turnover: £11,540 - CBRE Estimate, calculated at 2008 prices, from latest data from 'UK Food & Grocery Retailers 2010', Verdict.
- Brighton Marina, Outer Harbour Development Turnover (£3,210 per sq m) derived from planning application Planning Statement.
- Pets at Home Turnover (£2,161 per sq m), derived from the planning application. According to planning application Retail Statement, most Pets at Home turnover at 80% of this, therefore estimated turnover is £1.6m.

COMPARISON GOODS

Table C1.6

City-wide wide baseline capacity (£m): Based on constant market share

	2011	2016	2021	2026	2030
Expenditure retention					
Total available comparison expenditure in study area (exc SFT) (£m) ⁽¹⁾	1523.6	1578.0	1655.2	1735.0	1809.4
Retention level of comparison floorspace in Brighton & Hove (%) ⁽²⁾	60.9%	60.9%	60.9%	60.9%	60.9%
Expenditure from study area retained by stores in Brighton & Hove (£m) ⁽³⁾	927.9	961.0	1008.0	1056.6	1101.9
Expenditure inflow					
Estimated proportion of in store comparison turnover from beyond study area (%) ⁽⁴⁾	2.0%	2.0%	2.0%	2.0%	2.0%
Implied expenditure inflow to stores in Brighton & Hove (£m)	18.9	19.6	20.6	21.6	22.5
Total available expenditure					
Total available comparison expenditure in Brighton & Hove (£m) ⁽⁵⁾	946.8	980.6	1028.6	1078.2	1124.4
Claims on expenditure					
Turnover of existing stores (£m) ⁽⁶⁾	946.8	946.8	946.8	946.8	946.8
Improvements in sales densities of existing stores (£m) ⁽⁷⁾	0.0	0.0	0.0	0.0	0.0
Turnover of comparison floorspace commitments (£m) ⁽⁸⁾	22.4	54.0	54.0	54.0	54.0
Residual expenditure					
Total residual expenditure available to support new comparison floorspace (£m) ⁽⁹⁾	-22.4	-20.2	27.7	77.3	123.5
Estimated sales density of new comparison floorspace (£/sqm net) ⁽¹⁰⁾	5,000	5,000	5,000	5,000	5,000
Capacity					
Capacity for new comparison floorspace (sqm net) ⁽¹¹⁾	-4,476	-4,049	5,542	15,466	24,709
Capacity for new comparison floorspace (sqm gross) ⁽¹²⁾	-6,394	-5,784	7,917	22,094	35,298

Sources/notes for Table C1.6

1. Total available expenditure sourced from Table C1.2.
2. The spending patterns (Table 1.4) calculated from the 2005 household survey divided by the total available expenditure from the study area. This assumes a constant market share of 60.9%.
3. Retained expenditure by stores within the Local Authority administrative boundary is sourced from Table B1.4. For future years it is calculated by multiplying the total available expenditure from the study area by the market share.
4. Proportion of in store convenience turnover from beyond study area is estimated by CB Richard Ellis. The proportion calculated is to principally account for tourism. Proportion of available expenditure from inflow is held constant in future years.
5. Total available expenditure is the sum of total available expenditure from the study area and inflow expenditure.
6. Turnover of existing stores (including shelf-picking from Internet sales) is equivalent to total available expenditure as the market is assumed to be in equilibrium.
7. We are concerned with the assumption and data related to stores increasing their sales density in future years with improvements arising from more efficient trading practices. We consider that data relating to floorspace efficiency can be optimistic. We therefore have not made an account for this.
8. Turnover of commitments is sourced from Table B1.5.
9. Total residual expenditure available to support new floorspace is the result of subtracting turnover of existing stores, expenditure diverted through an increase in SFT and turnover of commitments from total available expenditure.
10. Sales density of new convenience floorspace is estimated by CB Richard Ellis.
11. Capacity for new floorspace (net sales) is the result of dividing residual expenditure by estimated sales density.
12. Capacity for new floorspace (gross) assumes that the net sales floorspace forms 70% of the gross floorspace.

COMPARISON GOODS

Table C1.7

City-wide wide capacity (£m): Based on improved market share

	2011	2016	2021	2026	2030
Expenditure retention					
Total available comparison expenditure in study area (exc SFT) (£m) ⁽¹⁾	1523.6	1578.0	1655.2	1735.0	1809.4
Market share of comparison floorspace in Brighton & Hove (%) ⁽²⁾	60.9%	70.0%	70.0%	70.0%	70.0%
Expenditure from study area retained by stores in Brighton & Hove (£m) ⁽³⁾	927.9	1104.6	1158.6	1214.5	1266.6
Expenditure inflow					
Estimated proportion of in store comparison turnover from beyond study area (%) ⁽⁴⁾	2.0%	2.0%	2.0%	2.0%	2.0%
Implied expenditure inflow to stores in Brighton & Hove (£m)	18.9	22.5	23.6	24.8	25.8
Total available expenditure					
Total available comparison expenditure in Brighton & Hove (£m) ⁽⁵⁾	946.8	1127.1	1182.3	1239.3	1292.4
Claims on expenditure					
Turnover of existing stores (£m) ⁽⁶⁾	946.8	946.8	946.8	946.8	946.8
Improvements in sales densities of existing stores (£m) ⁽⁷⁾	0.0	0.0	0.0	0.0	0.0
Turnover of comparison floorspace commitments (£m) ⁽⁸⁾	22.4	54.0	54.0	54.0	54.0
Residual expenditure					
Total residual expenditure available to support new comparison floorspace (£m) ⁽⁹⁾	-22.4	126.3	181.4	238.4	291.6
Estimated sales density of new comparison floorspace (£/sqm net) ⁽¹⁰⁾	5,000	5,000	5,000	5,000	5,000
Capacity					
Capacity for new comparison floorspace (sqm net) ⁽¹¹⁾	-4,476	25,259	36,283	47,689	58,313
Capacity for new comparison floorspace (sqm gross) ⁽¹²⁾	-6,394	36,084	51,832	68,128	83,304

Sources/notes for Table C1.6

- Total available expenditure sourced from Table C1.2.
- The spending patterns (Table 1.4) calculated from the 2005 household survey divided by the total available expenditure from the study area. The market share has been adjusted to increase the retention level of comparison floorspace to 70% at 2016 (an increase of 9.1%) which is considered a reasonable increase to reflect the future re development of the Brighton Centre which will increase the net additional retail floorspace by 20,000 sq m.
- Retained expenditure by stores within the Local Authority administrative boundary is sourced from Table B1.4. For future years it is calculated by multiplying the total available expenditure from the study area by the market share.
- Proportion of in store convenience turnover from beyond study area is estimated by CB Richard Ellis. The proportion calculated is to principally account for tourism. Proportion of available expenditure from inflow is held constant in future years.
- Total available expenditure is the sum of total available expenditure from the study area and inflow expenditure.
- Turnover of existing stores (including shelf-picking from Internet sales) is equivalent to total available expenditure as the market is assumed to be in equilibrium.
- We are concerned with the assumption and data related to stores increasing their sales density in future years with improvements arising from more efficient trading practices. We consider that data relating to floorspace efficiency can be optimistic. We therefore have not made an account for this.
- Turnover of commitments is sourced from Table B1.5.
- Total residual expenditure available to support new floorspace is the result of subtracting turnover of existing stores, expenditure diverted through an increase in SFT and turnover of commitments from total available expenditure.
- Sales density of new convenience floorspace is estimated by CB Richard Ellis.
- Capacity for new floorspace (net sales) is the result of dividing residual expenditure by estimated sales density.
- Capacity for new floorspace (gross) assumes that the net sales floorspace forms 70% of the gross floorspace.

D

Retailer Requirements

BRIGHTON REGIONAL CENTRE RETAIL REQUIREMENTS

Location	Location Type	From sq ft	To sq ft	Class	Retailer	Agency (1) Name
Brighton	Town	400	400	All	Scribbler	Michael Peddar & Co
Brighton	Town	1250	1500	All	Polarn O Pyret	Stephen Kane & Co
Brighton	Town	1200	3000	A1	Gerry Weber	Kitchen La Frenais Morgan
Brighton	Town	550	950	A1	Muse	Chase & Partners Llp
Brighton	Town	800	2000	All	Caffe Nero	twentyretail
Brighton	Town	1620	2160	All	Bose Ltd	Jp Retail
Brighton	Town	800	1200	A1	Mambo	GVA
Brighton	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Brighton	Town	2500	3500	A1	All Saints	CWM
Brighton	Town	0	6000	Not specified	CWM	CWM
Brighton	Town	1750	0	All	Bertie	Michael Peddar & Co
Brighton	Town	1500	3000	A1	PR Books Ltd	Fawley Watson Booth
Brighton	Town	2500	0	All	Select	Rowley Hughes Thompson Ltd
Brighton	Town	8000	10000	A3	Captain America Cookhouse and Bar	Jones Lang LaSalle
Brighton	Town	600	1000	All	MBT Shoes	Jackson Criss
Brighton	Town	750	2000	All	Flight Centre Property Services	BC Commercial
Brighton	Town	1200	1500	All	Costa	Briant Champion Long LLP
Brighton	Town	800	1500	A1	Menkind Stores	Angermann Goddard & Loyd
Brighton	Town	800	1200	A1	Warren James Jewellers	Brasier Freeth
Brighton	Town	0	0	All	3 Mobile	Michael Peddar & Co
Brighton	Town	750	2000	All	Liz Earle	David Menzies Associates
Brighton	Town	1500	3000	A1	Bargain Book Time	Fawley Watson Booth
Brighton	Town	1200	1500	All	Destination Skin	Pjk Chartered Surveyors

Brighton	Town	43560	130680	Not specified	Powerleague	GVA
Brighton	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths
Brighton	Town	6500	10000	A1	Anthropologie	Ian Scott International
Brighton	Town	300	1000	A1	Penhaligons	Harper Dennis Hobbs
Brighton	Town	592	645	A1	Princesse tam.tam	Harper Dennis Hobbs
Brighton	Town	500	3500	All	Oporto	Kitchen La Frenais Morgan
Brighton	Town	1500	2000	All	Yorkshire Building Society	Legat Owen
Brighton	Town	1000	2000	A1	Card Factory	Fawley Watson Booth
Brighton	Town	500	1000	A1	Yoko Garraspa	Capital Retail
Brighton	Town	1000	1500	A1	HPJ Retailing	Capa
Brighton	Town	750	1200	A1	Greggs plc	Hughes Ellard
Brighton	Town	800	0	A1	Ben Sherman	CWM
Brighton	Town	1250	5000	A2	Insurance	Brasier Freeth
Brighton	Town	0	0	A3	McDonalds Restaurants Limited	McDonalds Restaurants Limited
Brighton	Town	750	1000	A5	Papa Johns	Colliers International
Brighton	Town	1300	2000	A1	Leia	Briant Champion Long LLP
Brighton	Town	1750	3500	A1	Kathmandu UK Ltd	Rmg Retail
Brighton	Town	500	2500	A3	Chilango	Montagu Evans
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	1500	3000	All	Tommy Hilfiger	CWM
Brighton	Town	2000	5000	All	Specialized UK Ltd	Bridger Bell
Brighton	Town	500	1500	A1	Jo Malone	Miles Commercial
Brighton	Town	600	1200	All	Rituals	Charles Palmer Property

Brighton	Town	400	600	All	Dahlia Fashion	Johnstone Hall
Brighton	Town	1350	1750	All	Ismail Coffee and Tea	Ismail Coffee and Tea
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	600	1200	A1	Fossil	Harper Dennis Hobbs
Brighton	Town	1200	1200	All	Brora	twentyretail
Brighton	Town	800	1250	A1	The Lollipop Shoppe	Norbury Le Maistre
Brighton	Town	600	1500	A1	Comptoir des Cotonniers	Kitchen La Frenais Morgan
Brighton	Town	500	1000	A1	Gobstoppers	Brasier Freeth
Brighton	Town	300	1200	A5	The Old Cornish Pasty Company	Bidwells Llp
Brighton	Town	750	1250	A1	Mistral	Downing Bentley

HOVE TOWN CENTRE RETAIL REQUIREMENTS

Location	Location Type	From sq ft	To sq ft	Class	Retailer	Agency (1) Name
Hove	Town	1500	3000	All	Edinburgh Woollen Mill	Edinburgh Woollen Mill
Hove	Town	800	2000	All	Caffe Nero	twentyretail
Hove	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Hove	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths

BRIGHTON REGIONAL CENTRE RETAIL REQUIREMENTS

Location	Location Type	From sq ft	To sq ft	Class	Retailer	Agency (1) Name
Brighton	Town	400	400	All	Scribbler	Michael Peddar & Co
Brighton	Town	1250	1500	All	Polarn O Pyret	Stephen Kane & Co
Brighton	Town	1200	3000	A1	Gerry Weber	Kitchen La Frenais Morgan
Brighton	Town	550	950	A1	Muse	Chase & Partners Llp
Brighton	Town	800	2000	All	Caffe Nero	twentyretail
Brighton	Town	1620	2160	All	Bose Ltd	Jp Retail
Brighton	Town	800	1200	A1	Mambo	GVA
Brighton	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Brighton	Town	2500	3500	A1	All Saints	CWM
Brighton	Town	0	6000	Not specified	CWM	CWM
Brighton	Town	1750	0	All	Bertie	Michael Peddar & Co
Brighton	Town	1500	3000	A1	PR Books Ltd	Fawley Watson Booth
Brighton	Town	2500	0	All	Select	Rowley Hughes Thompson Ltd
Brighton	Town	8000	10000	A3	Captain America Cookhouse and Bar	Jones Lang LaSalle
Brighton	Town	600	1000	All	MBT Shoes	Jackson Criss
Brighton	Town	750	2000	All	Flight Centre Property Services	BC Commercial
Brighton	Town	1200	1500	All	Costa	Briant Champion Long LLP
Brighton	Town	800	1500	A1	Menkind Stores	Angermann Goddard & Loyd
Brighton	Town	800	1200	A1	Warren James Jewellers	Brasier Freeth
Brighton	Town	0	0	All	3 Mobile	Michael Peddar & Co
Brighton	Town	750	2000	All	Liz Earle	David Menzies Associates
Brighton	Town	1500	3000	A1	Bargain Book Time	Fawley Watson Booth
Brighton	Town	1200	1500	All	Destination Skin	Pjk Chartered Surveyors

Brighton	Town	43560	130680	Not specified	Powerleague	GVA
Brighton	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths
Brighton	Town	6500	10000	A1	Anthropologie	Ian Scott International
Brighton	Town	300	1000	A1	Penhaligons	Harper Dennis Hobbs
Brighton	Town	592	645	A1	Princesse tam.tam	Harper Dennis Hobbs
Brighton	Town	500	3500	All	Oporto	Kitchen La Frenais Morgan
Brighton	Town	1500	2000	All	Yorkshire Building Society	Legat Owen
Brighton	Town	1000	2000	A1	Card Factory	Fawley Watson Booth
Brighton	Town	500	1000	A1	Yoko Garraspa	Capital Retail
Brighton	Town	1000	1500	A1	HPJ Retailing	Capa
Brighton	Town	750	1200	A1	Greggs plc	Hughes Ellard
Brighton	Town	800	0	A1	Ben Sherman	CWM
Brighton	Town	1250	5000	A2	Insurance	Brasier Freeth
Brighton	Town	0	0	A3	McDonalds Restaurants Limited	McDonalds Restaurants Limited
Brighton	Town	750	1000	A5	Papa Johns	Colliers International
Brighton	Town	1300	2000	A1	Leia	Briant Champion Long LLP
Brighton	Town	1750	3500	A1	Kathmandu UK Ltd	Rmg Retail
Brighton	Town	500	2500	A3	Chilango	Montagu Evans
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	1500	3000	All	Tommy Hilfiger	CWM
Brighton	Town	2000	5000	All	Specialized UK Ltd	Bridger Bell
Brighton	Town	500	1500	A1	Jo Malone	Miles Commercial
Brighton	Town	600	1200	All	Rituals	Charles Palmer Property

Brighton	Town	400	600	All	Dahlia Fashion	Johnstone Hall
Brighton	Town	1350	1750	All	Ismail Coffee and Tea	Ismail Coffee and Tea
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	600	1200	A1	Fossil	Harper Dennis Hobbs
Brighton	Town	1200	1200	All	Brora	twentyretail
Brighton	Town	800	1250	A1	The Lollipop Shoppe	Norbury Le Maistre
Brighton	Town	600	1500	A1	Comptoir des Cotonniers	Kitchen La Frenais Morgan
Brighton	Town	500	1000	A1	Gobstoppers	Brasier Freeth
Brighton	Town	300	1200	A5	The Old Cornish Pasty Company	Bidwells Llp
Brighton	Town	750	1250	A1	Mistral	Downing Bentley

HOVE TOWN CENTRE RETAIL REQUIREMENTS

Location	Location Type	From sq ft	To sq ft	Class	Retailer	Agency (1) Name
Hove	Town	1500	3000	All	Edinburgh Woollen Mill	Edinburgh Woollen Mill
Hove	Town	800	2000	All	Caffe Nero	twentyretail
Hove	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Hove	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths

BRIGHTON REGIONAL CENTRE RETAIL REQUIREMENTS

Location	Location Type	From sq ft	To sq ft	Class	Retailer	Agency (1) Name
Brighton	Town	400	400	All	Scribbler	Michael Peddar & Co
Brighton	Town	1250	1500	All	Polarn O Pyret	Stephen Kane & Co
Brighton	Town	1200	3000	A1	Gerry Weber	Kitchen La Frenais Morgan
Brighton	Town	550	950	A1	Muse	Chase & Partners Llp
Brighton	Town	800	2000	All	Caffe Nero	twentyretail
Brighton	Town	1620	2160	All	Bose Ltd	Jp Retail
Brighton	Town	800	1200	A1	Mambo	GVA
Brighton	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Brighton	Town	2500	3500	A1	All Saints	CWM
Brighton	Town	0	6000	Not specified	CWM	CWM
Brighton	Town	1750	0	All	Bertie	Michael Peddar & Co
Brighton	Town	1500	3000	A1	PR Books Ltd	Fawley Watson Booth
Brighton	Town	2500	0	All	Select	Rowley Hughes Thompson Ltd
Brighton	Town	8000	10000	A3	Captain America Cookhouse and Bar	Jones Lang LaSalle
Brighton	Town	600	1000	All	MBT Shoes	Jackson Criss
Brighton	Town	750	2000	All	Flight Centre Property Services	BC Commercial
Brighton	Town	1200	1500	All	Costa	Briant Champion Long LLP
Brighton	Town	800	1500	A1	Menkind Stores	Angermann Goddard & Loyd
Brighton	Town	800	1200	A1	Warren James Jewellers	Brasier Freeth
Brighton	Town	0	0	All	3 Mobile	Michael Peddar & Co
Brighton	Town	750	2000	All	Liz Earle	David Menzies Associates
Brighton	Town	1500	3000	A1	Bargain Book Time	Fawley Watson Booth
Brighton	Town	1200	1500	All	Destination Skin	Pjk Chartered Surveyors

Brighton	Town	43560	130680	Not specified	Powerleague	GVA
Brighton	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths
Brighton	Town	6500	10000	A1	Anthropologie	Ian Scott International
Brighton	Town	300	1000	A1	Penhaligons	Harper Dennis Hobbs
Brighton	Town	592	645	A1	Princesse tam.tam	Harper Dennis Hobbs
Brighton	Town	500	3500	All	Oporto	Kitchen La Frenais Morgan
Brighton	Town	1500	2000	All	Yorkshire Building Society	Legat Owen
Brighton	Town	1000	2000	A1	Card Factory	Fawley Watson Booth
Brighton	Town	500	1000	A1	Yoko Garraspa	Capital Retail
Brighton	Town	1000	1500	A1	HPJ Retailing	Capa
Brighton	Town	750	1200	A1	Greggs plc	Hughes Ellard
Brighton	Town	800	0	A1	Ben Sherman	CWM
Brighton	Town	1250	5000	A2	Insurance	Brasier Freeth
Brighton	Town	0	0	A3	McDonalds Restaurants Limited	McDonalds Restaurants Limited
Brighton	Town	750	1000	A5	Papa Johns	Colliers International
Brighton	Town	1300	2000	A1	Leia	Briant Champion Long LLP
Brighton	Town	1750	3500	A1	Kathmandu UK Ltd	Rmg Retail
Brighton	Town	500	2500	A3	Chilango	Montagu Evans
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	1500	3000	All	Tommy Hilfiger	CWM
Brighton	Town	2000	5000	All	Specialized UK Ltd	Bridger Bell
Brighton	Town	500	1500	A1	Jo Malone	Miles Commercial
Brighton	Town	600	1200	All	Rituals	Charles Palmer Property

Brighton	Town	400	600	All	Dahlia Fashion	Johnstone Hall
Brighton	Town	1350	1750	All	Ismail Coffee and Tea	Ismail Coffee and Tea
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	600	1200	A1	Fossil	Harper Dennis Hobbs
Brighton	Town	1200	1200	All	Brora	twentyretail
Brighton	Town	800	1250	A1	The Lollipop Shoppe	Norbury Le Maistre
Brighton	Town	600	1500	A1	Comptoir des Cotonniers	Kitchen La Frenais Morgan
Brighton	Town	500	1000	A1	Gobstoppers	Brasier Freeth
Brighton	Town	300	1200	A5	The Old Cornish Pasty Company	Bidwells Llp
Brighton	Town	750	1250	A1	Mistral	Downing Bentley

HOVE TOWN CENTRE RETAIL REQUIREMENTS

Location	Location Type	From sq ft	To sq ft	Class	Retailer	Agency (1) Name
Hove	Town	1500	3000	All	Edinburgh Woollen Mill	Edinburgh Woollen Mill
Hove	Town	800	2000	All	Caffe Nero	twentyretail
Hove	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Hove	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths

BRIGHTON REGIONAL CENTRE RETAIL REQUIREMENTS

Location	Location Type	From sq ft	To sq ft	Class	Retailer	Agency (1) Name
Brighton	Town	400	400	All	Scribbler	Michael Peddar & Co
Brighton	Town	1250	1500	All	Polarn O Pyret	Stephen Kane & Co
Brighton	Town	1200	3000	A1	Gerry Weber	Kitchen La Frenais Morgan
Brighton	Town	550	950	A1	Muse	Chase & Partners Llp
Brighton	Town	800	2000	All	Caffe Nero	twentyretail
Brighton	Town	1620	2160	All	Bose Ltd	Jp Retail
Brighton	Town	800	1200	A1	Mambo	GVA
Brighton	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Brighton	Town	2500	3500	A1	All Saints	CWM
Brighton	Town	0	6000	Not specified	CWM	CWM
Brighton	Town	1750	0	All	Bertie	Michael Peddar & Co
Brighton	Town	1500	3000	A1	PR Books Ltd	Fawley Watson Booth
Brighton	Town	2500	0	All	Select	Rowley Hughes Thompson Ltd
Brighton	Town	8000	10000	A3	Captain America Cookhouse and Bar	Jones Lang LaSalle
Brighton	Town	600	1000	All	MBT Shoes	Jackson Criss
Brighton	Town	750	2000	All	Flight Centre Property Services	BC Commercial
Brighton	Town	1200	1500	All	Costa	Briant Champion Long LLP
Brighton	Town	800	1500	A1	Menkind Stores	Angermann Goddard & Loyd
Brighton	Town	800	1200	A1	Warren James Jewellers	Brasier Freeth
Brighton	Town	0	0	All	3 Mobile	Michael Peddar & Co
Brighton	Town	750	2000	All	Liz Earle	David Menzies Associates
Brighton	Town	1500	3000	A1	Bargain Book Time	Fawley Watson Booth
Brighton	Town	1200	1500	All	Destination Skin	Pjk Chartered Surveyors

Brighton	Town	43560	130680	Not specified	Powerleague	GVA
Brighton	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths
Brighton	Town	6500	10000	A1	Anthropologie	Ian Scott International
Brighton	Town	300	1000	A1	Penhaligons	Harper Dennis Hobbs
Brighton	Town	592	645	A1	Princesse tam.tam	Harper Dennis Hobbs
Brighton	Town	500	3500	All	Oporto	Kitchen La Frenais Morgan
Brighton	Town	1500	2000	All	Yorkshire Building Society	Legat Owen
Brighton	Town	1000	2000	A1	Card Factory	Fawley Watson Booth
Brighton	Town	500	1000	A1	Yoko Garraspa	Capital Retail
Brighton	Town	1000	1500	A1	HPJ Retailing	Capa
Brighton	Town	750	1200	A1	Greggs plc	Hughes Ellard
Brighton	Town	800	0	A1	Ben Sherman	CWM
Brighton	Town	1250	5000	A2	Insurance	Brasier Freeth
Brighton	Town	0	0	A3	McDonalds Restaurants Limited	McDonalds Restaurants Limited
Brighton	Town	750	1000	A5	Papa Johns	Colliers International
Brighton	Town	1300	2000	A1	Leia	Briant Champion Long LLP
Brighton	Town	1750	3500	A1	Kathmandu UK Ltd	Rmg Retail
Brighton	Town	500	2500	A3	Chilango	Montagu Evans
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	1500	3000	All	Tommy Hilfiger	CWM
Brighton	Town	2000	5000	All	Specialized UK Ltd	Bridger Bell
Brighton	Town	500	1500	A1	Jo Malone	Miles Commercial
Brighton	Town	600	1200	All	Rituals	Charles Palmer Property

Brighton	Town	400	600	All	Dahlia Fashion	Johnstone Hall
Brighton	Town	1350	1750	All	Ismail Coffee and Tea	Ismail Coffee and Tea
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	600	1200	A1	Fossil	Harper Dennis Hobbs
Brighton	Town	1200	1200	All	Brora	twentyretail
Brighton	Town	800	1250	A1	The Lollipop Shoppe	Norbury Le Maistre
Brighton	Town	600	1500	A1	Comptoir des Cotonniers	Kitchen La Frenais Morgan
Brighton	Town	500	1000	A1	Gobstoppers	Brasier Freeth
Brighton	Town	300	1200	A5	The Old Cornish Pasty Company	Bidwells Llp
Brighton	Town	750	1250	A1	Mistral	Downing Bentley

HOVE TOWN CENTRE RETAIL REQUIREMENTS

Location	Location Type	From sq ft	To sq ft	Class	Retailer	Agency (1) Name
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Hove	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths

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Brighton	Town	0	6000	Not specified	CWM	CWM
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Brighton	Town	800	1200	A1	Warren James Jewellers	Brasier Freeth
Brighton	Town	0	0	All	3 Mobile	Michael Peddar & Co
Brighton	Town	750	2000	All	Liz Earle	David Menzies Associates
Brighton	Town	1500	3000	A1	Bargain Book Time	Fawley Watson Booth
Brighton	Town	1200	1500	All	Destination Skin	Pjk Chartered Surveyors

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Brighton	Town	1500	2000	All	Yorkshire Building Society	Legat Owen
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Brighton	Town	500	1000	A1	Yoko Garraspa	Capital Retail
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Brighton	Town	750	1200	A1	Greggs plc	Hughes Ellard
Brighton	Town	800	0	A1	Ben Sherman	CWM
Brighton	Town	1250	5000	A2	Insurance	Brasier Freeth
Brighton	Town	0	0	A3	McDonalds Restaurants Limited	McDonalds Restaurants Limited
Brighton	Town	750	1000	A5	Papa Johns	Colliers International
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Brighton	Town	1750	3500	A1	Kathmandu UK Ltd	Rmg Retail
Brighton	Town	500	2500	A3	Chilango	Montagu Evans
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	1500	3000	All	Tommy Hilfiger	CWM
Brighton	Town	2000	5000	All	Specialized UK Ltd	Bridger Bell
Brighton	Town	500	1500	A1	Jo Malone	Miles Commercial
Brighton	Town	600	1200	All	Rituals	Charles Palmer Property

Brighton	Town	400	600	All	Dahlia Fashion	Johnstone Hall
Brighton	Town	1350	1750	All	Ismail Coffee and Tea	Ismail Coffee and Tea
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	600	1200	A1	Fossil	Harper Dennis Hobbs
Brighton	Town	1200	1200	All	Brora	twentyretail
Brighton	Town	800	1250	A1	The Lollipop Shoppe	Norbury Le Maistre
Brighton	Town	600	1500	A1	Comptoir des Cotonniers	Kitchen La Frenais Morgan
Brighton	Town	500	1000	A1	Gobstoppers	Brasier Freeth
Brighton	Town	300	1200	A5	The Old Cornish Pasty Company	Bidwells Llp
Brighton	Town	750	1250	A1	Mistral	Downing Bentley

HOVE TOWN CENTRE RETAIL REQUIREMENTS

Location	Location Type	From sq ft	To sq ft	Class	Retailer	Agency (1) Name
Hove	Town	1500	3000	All	Edinburgh Woollen Mill	Edinburgh Woollen Mill
Hove	Town	800	2000	All	Caffe Nero	twentyretail
Hove	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Hove	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths

BRIGHTON REGIONAL CENTRE RETAIL REQUIREMENTS

Location	Location Type	From sq ft	To sq ft	Class	Retailer	Agency (1) Name
Brighton	Town	400	400	All	Scribbler	Michael Peddar & Co
Brighton	Town	1250	1500	All	Polarn O Pyret	Stephen Kane & Co
Brighton	Town	1200	3000	A1	Gerry Weber	Kitchen La Frenais Morgan
Brighton	Town	550	950	A1	Muse	Chase & Partners Llp
Brighton	Town	800	2000	All	Caffe Nero	twentyretail
Brighton	Town	1620	2160	All	Bose Ltd	Jp Retail
Brighton	Town	800	1200	A1	Mambo	GVA
Brighton	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Brighton	Town	2500	3500	A1	All Saints	CWM
Brighton	Town	0	6000	Not specified	CWM	CWM
Brighton	Town	1750	0	All	Bertie	Michael Peddar & Co
Brighton	Town	1500	3000	A1	PR Books Ltd	Fawley Watson Booth
Brighton	Town	2500	0	All	Select	Rowley Hughes Thompson Ltd
Brighton	Town	8000	10000	A3	Captain America Cookhouse and Bar	Jones Lang LaSalle
Brighton	Town	600	1000	All	MBT Shoes	Jackson Criss
Brighton	Town	750	2000	All	Flight Centre Property Services	BC Commercial
Brighton	Town	1200	1500	All	Costa	Briant Champion Long LLP
Brighton	Town	800	1500	A1	Menkind Stores	Angermann Goddard & Loyd
Brighton	Town	800	1200	A1	Warren James Jewellers	Brasier Freeth
Brighton	Town	0	0	All	3 Mobile	Michael Peddar & Co
Brighton	Town	750	2000	All	Liz Earle	David Menzies Associates
Brighton	Town	1500	3000	A1	Bargain Book Time	Fawley Watson Booth
Brighton	Town	1200	1500	All	Destination Skin	Pjk Chartered Surveyors

Brighton	Town	43560	130680	Not specified	Powerleague	GVA
Brighton	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths
Brighton	Town	6500	10000	A1	Anthropologie	Ian Scott International
Brighton	Town	300	1000	A1	Penhaligons	Harper Dennis Hobbs
Brighton	Town	592	645	A1	Princesse tam.tam	Harper Dennis Hobbs
Brighton	Town	500	3500	All	Oporto	Kitchen La Frenais Morgan
Brighton	Town	1500	2000	All	Yorkshire Building Society	Legat Owen
Brighton	Town	1000	2000	A1	Card Factory	Fawley Watson Booth
Brighton	Town	500	1000	A1	Yoko Garraspa	Capital Retail
Brighton	Town	1000	1500	A1	HPJ Retailing	Capa
Brighton	Town	750	1200	A1	Greggs plc	Hughes Ellard
Brighton	Town	800	0	A1	Ben Sherman	CWM
Brighton	Town	1250	5000	A2	Insurance	Brasier Freeth
Brighton	Town	0	0	A3	McDonalds Restaurants Limited	McDonalds Restaurants Limited
Brighton	Town	750	1000	A5	Papa Johns	Colliers International
Brighton	Town	1300	2000	A1	Leia	Briant Champion Long LLP
Brighton	Town	1750	3500	A1	Kathmandu UK Ltd	Rmg Retail
Brighton	Town	500	2500	A3	Chilango	Montagu Evans
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	1500	3000	All	Tommy Hilfiger	CWM
Brighton	Town	2000	5000	All	Specialized UK Ltd	Bridger Bell
Brighton	Town	500	1500	A1	Jo Malone	Miles Commercial
Brighton	Town	600	1200	All	Rituals	Charles Palmer Property

Brighton	Town	400	600	All	Dahlia Fashion	Johnstone Hall
Brighton	Town	1350	1750	All	Ismail Coffee and Tea	Ismail Coffee and Tea
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	600	1200	A1	Fossil	Harper Dennis Hobbs
Brighton	Town	1200	1200	All	Brora	twentyretail
Brighton	Town	800	1250	A1	The Lollipop Shoppe	Norbury Le Maistre
Brighton	Town	600	1500	A1	Comptoir des Cotonniers	Kitchen La Frenais Morgan
Brighton	Town	500	1000	A1	Gobstoppers	Brasier Freeth
Brighton	Town	300	1200	A5	The Old Cornish Pasty Company	Bidwells Llp
Brighton	Town	750	1250	A1	Mistral	Downing Bentley

HOVE TOWN CENTRE RETAIL REQUIREMENTS

Location	Location Type	From sq ft	To sq ft	Class	Retailer	Agency (1) Name
Hove	Town	1500	3000	All	Edinburgh Woollen Mill	Edinburgh Woollen Mill
Hove	Town	800	2000	All	Caffe Nero	twentyretail
Hove	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Hove	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths

BRIGHTON REGIONAL CENTRE RETAIL REQUIREMENTS

Location	Location Type	From sq ft	To sq ft	Class	Retailer	Agency (1) Name
Brighton	Town	400	400	All	Scribbler	Michael Peddar & Co
Brighton	Town	1250	1500	All	Polarn O Pyret	Stephen Kane & Co
Brighton	Town	1200	3000	A1	Gerry Weber	Kitchen La Frenais Morgan
Brighton	Town	550	950	A1	Muse	Chase & Partners Llp
Brighton	Town	800	2000	All	Caffe Nero	twentyretail
Brighton	Town	1620	2160	All	Bose Ltd	Jp Retail
Brighton	Town	800	1200	A1	Mambo	GVA
Brighton	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Brighton	Town	2500	3500	A1	All Saints	CWM
Brighton	Town	0	6000	Not specified	CWM	CWM
Brighton	Town	1750	0	All	Bertie	Michael Peddar & Co
Brighton	Town	1500	3000	A1	PR Books Ltd	Fawley Watson Booth
Brighton	Town	2500	0	All	Select	Rowley Hughes Thompson Ltd
Brighton	Town	8000	10000	A3	Captain America Cookhouse and Bar	Jones Lang LaSalle
Brighton	Town	600	1000	All	MBT Shoes	Jackson Criss
Brighton	Town	750	2000	All	Flight Centre Property Services	BC Commercial
Brighton	Town	1200	1500	All	Costa	Briant Champion Long LLP
Brighton	Town	800	1500	A1	Menkind Stores	Angermann Goddard & Loyd
Brighton	Town	800	1200	A1	Warren James Jewellers	Brasier Freeth
Brighton	Town	0	0	All	3 Mobile	Michael Peddar & Co
Brighton	Town	750	2000	All	Liz Earle	David Menzies Associates
Brighton	Town	1500	3000	A1	Bargain Book Time	Fawley Watson Booth
Brighton	Town	1200	1500	All	Destination Skin	Pjk Chartered Surveyors

Brighton	Town	43560	130680	Not specified	Powerleague	GVA
Brighton	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths
Brighton	Town	6500	10000	A1	Anthropologie	Ian Scott International
Brighton	Town	300	1000	A1	Penhaligons	Harper Dennis Hobbs
Brighton	Town	592	645	A1	Princesse tam.tam	Harper Dennis Hobbs
Brighton	Town	500	3500	All	Oporto	Kitchen La Frenais Morgan
Brighton	Town	1500	2000	All	Yorkshire Building Society	Legat Owen
Brighton	Town	1000	2000	A1	Card Factory	Fawley Watson Booth
Brighton	Town	500	1000	A1	Yoko Garraspa	Capital Retail
Brighton	Town	1000	1500	A1	HPJ Retailing	Capa
Brighton	Town	750	1200	A1	Greggs plc	Hughes Ellard
Brighton	Town	800	0	A1	Ben Sherman	CWM
Brighton	Town	1250	5000	A2	Insurance	Brasier Freeth
Brighton	Town	0	0	A3	McDonalds Restaurants Limited	McDonalds Restaurants Limited
Brighton	Town	750	1000	A5	Papa Johns	Colliers International
Brighton	Town	1300	2000	A1	Leia	Briant Champion Long LLP
Brighton	Town	1750	3500	A1	Kathmandu UK Ltd	Rmg Retail
Brighton	Town	500	2500	A3	Chilango	Montagu Evans
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	1500	3000	All	Tommy Hilfiger	CWM
Brighton	Town	2000	5000	All	Specialized UK Ltd	Bridger Bell
Brighton	Town	500	1500	A1	Jo Malone	Miles Commercial
Brighton	Town	600	1200	All	Rituals	Charles Palmer Property

Brighton	Town	400	600	All	Dahlia Fashion	Johnstone Hall
Brighton	Town	1350	1750	All	Ismail Coffee and Tea	Ismail Coffee and Tea
Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	600	1200	A1	Fossil	Harper Dennis Hobbs
Brighton	Town	1200	1200	All	Brora	twentyretail
Brighton	Town	800	1250	A1	The Lollipop Shoppe	Norbury Le Maistre
Brighton	Town	600	1500	A1	Comptoir des Cotonniers	Kitchen La Frenais Morgan
Brighton	Town	500	1000	A1	Gobstoppers	Brasier Freeth
Brighton	Town	300	1200	A5	The Old Cornish Pasty Company	Bidwells Llp
Brighton	Town	750	1250	A1	Mistral	Downing Bentley

HOVE TOWN CENTRE RETAIL REQUIREMENTS

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Hove	Town	1500	3000	All	Edinburgh Woollen Mill	Edinburgh Woollen Mill
Hove	Town	800	2000	All	Caffe Nero	twentyretail
Hove	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Hove	Town	40	300	A1	Hatton Goldsmiths	Hatton Goldsmiths

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Brighton	Town	550	950	A1	Muse	Chase & Partners Llp
Brighton	Town	800	2000	All	Caffe Nero	twentyretail
Brighton	Town	1620	2160	All	Bose Ltd	Jp Retail
Brighton	Town	800	1200	A1	Mambo	GVA
Brighton	Town	1000	1500	A1	Mr Bean Coffee House	Cradick Retail
Brighton	Town	2500	3500	A1	All Saints	CWM
Brighton	Town	0	6000	Not specified	CWM	CWM
Brighton	Town	1750	0	All	Bertie	Michael Peddar & Co
Brighton	Town	1500	3000	A1	PR Books Ltd	Fawley Watson Booth
Brighton	Town	2500	0	All	Select	Rowley Hughes Thompson Ltd
Brighton	Town	8000	10000	A3	Captain America Cookhouse and Bar	Jones Lang LaSalle
Brighton	Town	600	1000	All	MBT Shoes	Jackson Criss
Brighton	Town	750	2000	All	Flight Centre Property Services	BC Commercial
Brighton	Town	1200	1500	All	Costa	Briant Champion Long LLP
Brighton	Town	800	1500	A1	Menkind Stores	Angermann Goddard & Loyd
Brighton	Town	800	1200	A1	Warren James Jewellers	Brasier Freeth
Brighton	Town	0	0	All	3 Mobile	Michael Peddar & Co
Brighton	Town	750	2000	All	Liz Earle	David Menzies Associates
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Brighton	Town	1200	2500	All	Joules Clothing Ltd	twentyretail
Brighton	Town	1500	3000	All	Tommy Hilfiger	CWM
Brighton	Town	2000	5000	All	Specialized UK Ltd	Bridger Bell
Brighton	Town	500	1500	A1	Jo Malone	Miles Commercial
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Brighton	Town	1200	1200	All	Brora	twentyretail
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