

1. Brighton & Hove Retail Study Update - September 2011

Consultants CBRE were instructed by the Council in May 2011 to undertake a retail study update to the Brighton and Hove Retail Study 2006 Retail Study published by GVA Grimley.

The update to the Study takes into account revised data for population projections, retail expenditure, company sales densities, and new retail commitments whilst drawing upon the 2006 Household Telephone Survey. The Study provides an assessment of the money that is available to be spent between the years 2011 and 2030 and a calculation of how much actual floorspace this represents [between the years of 2011 to 2030]. The Study also assesses the existing network of larger and smaller centres in Brighton and Hove and the function and effectiveness of the existing hierarchy of centres, and includes health checks of our Regional Centre, Town, District and Local Centres.

Identified Convenience Floorspace Capacity to 2030

In terms of the quantitative assessment of convenience¹ goods floorspace, the Study identifies no additional capacity for convenience goods floorspace in the short to medium term up to 2021. Additional capacity is only identified in the longer term, post 2026 with 2,967 sqm net identified up until 2030. As a consequence there is no requirement for the Council to plan for additional convenience retail or to allocate sites for convenience floorspace.

Identified Comparison Floorspace Capacity to 2030

In terms of the quantitative assessment of comparison² goods floorspace, the Study identifies some capacity for comparison goods floorspace with 58,313 sqm identified up to 2030. The study recommends that The Council should plan for the capacity identified through the redevelopment of the Brighton Centre and the extension to Churchill Square.

Hierarchy of Centres

A qualitative assessment was undertaken of the current hierarchy of Regional, Town, District and Local centres within the city. A summary of the performance of the centres is as follows;

Brighton Regional Centre

Performing relatively well, its major strength is its distinctive nature providing different shopping quarters. Some investment needed to ensure that visitors remain attracted to the centre e.g. street furniture. North Street, Western Road and Queens Road are particularly in need of some identity.

¹ Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionary.

² Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.

Hove Town Centre

Good mix of convenience and service retailers. The Town Centre is known as a destination for its night time economy. Town Centre's main weakness is its poor offering of comparison retailers particularly along George Street.

London Road Town Centre

Relatively busy centre although the quality of the shopping experience is not high. The Town Centre is not exploiting its full potential as shopping area. The Council should look to enhance its retail provision particularly for comparison goods, which are currently under represented. Investment in the street scene is encouraged along with better linkages with the New England Quarter.

Boundary Road/Station Road District Centre

An important functional centre for local people that would benefit from investment in the public realm in order to improve the shopping experience and attract new visitors.

Lewes Road District Centre

Although Sainsbury's at the northern end of Lewes Road provides an anchor store, the dominance of road networks in this part of the centre means that pedestrian flow is significantly reduced. Traffic calming measures to encourage footfall would be beneficial.

St James's Street District Centre

St James Street provides a vibrant retail destination both during the day and night. Investment in the public realm could enhance the district centre further.

Brighton Marina District Centre

The district centre has a very isolated feel compared to other centres. Future development at the Marina would need to consider how it links to existing parts of the centre and where possible improve the existing layout. The Black Rock site could help to create the right entrance to the Marina that it currently lacks and priority should be given to bringing forward appropriate uses on this site.

Although there is a reasonable amount of retail floorspace 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 district centre. The marina is also dominated by large leisure uses and waterfront restaurants.

It is recommended that the district centre designation of Brighton Marina should be removed and replaced by a site specific policy to manage the development and future uses.

Local Centres

The overall impression gained of the 17 local centres is that they are well used by the residential areas surrounding them. Convenience and service units tend to dominate the local centres and a number of them do have some comparison retailers although these tend to be specialist retailers. The

majority of retailers in the local centres tend to be independent retailers, although one multiple retailer 'Co-Operative Food' was present in nearly all the local centres, which provides a useful top-up to convenience shopping.

2. Housing Requirements Study – June 2011

The City Council commissioned this Study to provide an assessment of housing requirements for the City based on demographic and economic factors. The Study is intended to provide evidence to support future planning policies for housing within the City. It has been prepared by GL Hearn and JGC.

At the time of writing, housing requirements for Brighton and Hove are set out in the South East Plan. This sets out a housing requirement to build 11,400 homes in the City over the 2006-26 plan period (equivalent to 570 homes per year). This was influenced by the urban capacity of the City. The Coalition Government has, however, made clear its intention to revoke the South East Plan in due course and return responsibilities for determining housing provision to individual local authorities.

Brighton and Hove forms part of a Sussex Coast housing market. The City's population grew quite strongly in the late 1990s and between 2004-9, although it fell between 2001-4. The Brighton and Hove Strategic Housing Market Assessment identifies that a key feature of the local housing market is movement of households from London to Brighton, with movement of over 4,000 people per annum. Many of these are younger households aged 16-44. There is also a notable movement out of the City, particularly of 25-44 year olds from the City to adjacent districts, particularly to Adur and Lewes. The City's population structure has remained significantly younger than other areas, with population growth concentrated in the 15-44 age groups. There is a particularly high proportion of people aged 20-24 influenced in part by the presence of two universities. Natural change, with more births than deaths, is now a significant component of overall population growth in the City.

While house prices fell during 2008, losing 18% of their value, they have subsequently risen and in the third quarter 2010 were an average of £248,000: 8% above their previous peak. However housing sales have been significantly affected by the "credit crunch" and in 2010 remained 45% down on average levels over the decade to 2007. The availability of mortgage finance is currently restricting the ability of young households to purchase housing, and displacing demand towards rented tenures.

Brighton and Hove is one of the largest concentrations of employment in the South East region. The City's Employment Land Study indicates that in the pre-recession period, the City has experienced rapid employment growth; with employee jobs increasing by 21% (20,800) between 1998-2008 compared to 10% growth across the South East and England and Wales. However economic participation falls below average and action is required over the longer-term to increase employment and to create higher paid employment to reduce out-commuting.

The Study sought to explore housing need and demand over the period 2010 – 2030. Housing need and demand is driven by growth in the population and changing structure and size of households. It is also influenced by future economic performance, as this can affect migration to and from the City.

Net in-migration to Brighton and Hove over the last five years at an average of 1,340 people per annum has significantly exceeded longer-term trends, and compares to average net in-migration of 340 people per annum over a longer ten year period. Net migration to Brighton and Hove has particularly been influenced by international flows of migrant labour. Official national population projections suggest that this source of migration will reduce notably, and as a result rates of population growth in Brighton and Hove will slow. On this basis, a reasoned demographic based assessment of demand would result in a housing requirement of 19,400 homes over the 2010-30 period (970 pa).

However, a requirement based on projected economic performance comes out lower than this, suggesting that weaker employment growth in the future, relative to pre-recession trends, may reduce housing demand. The Study considers that it is reasonable to take account of commuting dynamics recognising the role which the City plays within a wider labour market. A scenario, developed on this basis, identifies a requirement based on forecast economic performance for 15,800 homes over the 2010-30 period (790 pa).

On this basis the Study advises that a realistic assessment of housing need/demand for Brighton and Hove would fall within the 790-970 homes per annum range (15,800 - 19,400 homes over the 20 years to 2030)

Current national planning policy (Planning Policy Statement 3: Housing) clearly identifies that need/demand needs to be considered alongside the availability of suitable land for residential development, amongst other factors, in identifying housing requirements. The ability to deliver the infrastructure necessary to support development is also important, and proposals for housing provision need to be tested through a Sustainability Appraisal.

The Council completed a Strategic Housing Land Availability Assessment (SHLAA) in March 2011 which provides detailed assessment of the capacity of the City for residential development to 2025. On the basis of a number of assumptions, a housing trajectory scenario has been developed with the Council as part of this Study. This suggests a capacity for development of around 12,100 dwellings in the City over the period to 2030, which includes a generous allowance for windfall development. While this falls below identified need/demand, because of the age structure and population dynamics of the City it would still support employment growth of over 11,500 jobs over the plan period (9%) as well as growth in the wider population of around 14,600 people (6%).

The Study does not support a reduction in the housing requirement below South East Plan levels (570 pa) based on assessed need/demand. In light of the evidence of need/demand this study suggests such a housing target could reasonably be regarded as a minimum. The housing trajectory identifies

potential for delivery of about 600 dwellings per annum (including development from windfall sites).

This study also suggest that as a result of land supply constraints within the City, it would be appropriate for the City Council to work with neighbouring authorities to consider how the undersupply could be addressed at a sub-regional or housing market level, noting that the City Council is not the only local authority which is likely to be unable to meet identified need/demand. This could be taken forward through cooperation and joint working with surrounding local authorities, or via joint working through the Coast to Capital Local Enterprise Partnership, but would need the support of neighbouring authorities.

