BRIGHTON & HOVE CONNECTED

Briefing Pack

Tuesday 5th July
4pm-6pm
Jurys Inn Brighton

Outline for Meeting

The objective of this meeting is to consider the future of the city in light of the major upcoming planned developments, and to develop an understanding of the impact in terms of our priorities of creating a city that is a great place to live, work and visit.

Brighton and Hove connected are asked to take this understanding and then use it to inform in future prioritisation for Brighton and Hove Connected and its thematic partnerships to enable the city as a whole to maximise the advantage and minimise the negative impacts of the planned developments on all residents, workers and visitors, ensuring that no one is left behind.

The meeting will begin with a presentation on the upcoming developments and the impact that we can expect. We will look at this in the light of the development of City Plan 2, the Fairness Commission report and projected population changes up to 2026.

This briefing pack provides some of the background, and, with the slides, will hopefully provide a useful basis for discussion and future prioritisation.

Sir Anthony Seldon, one of Britain's foremost contemporary historians, wrote about Brighton and Hove in 2002, soon after city status was granted. In *Brave New City*, Seldon, who was leading Brighton College into a successful new era at the time, and convened many lively discussions about the city's future, set out his "passionate advocacy of the need for progress". In December 2015, The guardian published an article entitled **Brighton reaches for the sky in bid to reverse its 'lost decade' of neglect –** below is an excerpt, quoting Anthony Seldon, arguing that we need to be bold to be successful:

"Brighton and Hove is like no other city or seaside town in Britain or northern Europe," he wrote. "It has evolved through eight eras of history… When it has been bold and imaginative it has been successful. When it has been safe and inward looking it has failed. Brighton & Hove must now move into a ninth era and become an international city or it will slip back again into the mediocrity that characterised so much of the post-war era."

Presentation on Future Developments and Their Impact

The presentation will contain the following:

- A map of all the major developments coming forward and a timetable to show how they overlap
- Seafront Investment e.g. Waterfront, King Alfred etc.
- City Centre Investment
- Lewes Road Investment
- Delivering affordable housing and housing to meet the social care challenges we face
- New Homes for Neighbourhoods programme
- Deliver housing to address social care challenges
- Keeping our city moving through the development phase
- Keeping residents and stakeholders engaged through the development process and maintaining the city's character
- Demonstration of the importance of enabling culture and events to happen and using arts and culture to engage young people in shaping the future of the city
- Ensuring no one is left behind as the city develops, including those furthest from the labour market in terms of employment opportunities.
- Looking to the Future - 2020 and 2050:
- What kind of city do we want to be and how can we consciously make decisions to help us get there?

Workshops

All members will be asked to join a workshop, looking at key aspects of our work:

What are the implications of these developments, both positive and challenging on Brighton & Hove being a great place to live, work and visit?

Each group to consider:

- What are the positive aspects of the development programme and what challenges does it present?
- Where does the development programme help us make good progress in terms of being a great area to live/work/visit?
- What are the areas that we need to improve in terms of being a great area to live/work/visit?
- What actions do we need to undertake to get us there?

Each group are encouraged to produce some specific ideas/issues for Brighton & Hove Connected to consider and take forward.

A Great Place to Live

- **Demographic Changes**

By 2026 the population of the Greater Brighton region is predicted to reach over three quarters of a million people from a current population of 708,000. All Towns within greater Brighton will see a population increase of between 7 and 10 per cent.

Brighton and Hove's population is projected to increase by 6.6 % or 19,000 people, though Lewes is set for the largest percentage increase of over 10%. The rate of increase is not constant though, and the growth rate in Brighton and Hove is set to dip until 2021 before rising again until 2026.

- **Population change by age – Greater Brighton**

While the overall population in Greater Brighton is expected to increase year on year there is considerable differences across different age groups. There is projected to be:

766,490
By 2026 the population of the Greater Brighton region is predicted to reach over three quarters of a million people from a current population of 708,000. With:

3%
Increase in the population aged 3 years or younger (1,565 people)

12%
Increase in the population aged 10 to 19 (9,565 people), with the 13 to 18 year old population increasing by 16 per cent (7,276 people)

9%
Fall in the population aged 22 to 26 (4,840 people)

8%
Increase in the population aged 30 to 41 (9,030 people)

12%
Fall in the population aged 47 to 52 (7,374 people)

24%
Increase in the population aged 54 to 67 (26,452 people)

11%
Fall in population aged 68 to 69 (1,837 people)

27%
Increase in the population aged 70 or older (25,608 people) including an 43 per cent increase in the those aged 75 to 83 (16, 633 people) and a 35 percent increase in those aged 90 or over (2,937 people)

- **Housing**

30,120
The city's objectively assessed housing need to 2030 is 30,120 dwellings

13,200
Given the constraints on land availability in the city to physically accommodate development the adopted City Plan Part One sets a housing target of 13,200 new homes to 2030

44%
This is around 44% of the city's housing need

87% of these to be developed on brown field sites. 6,000 of these homes can be provided in the already identified development areas, with just over 5,000 being provided through the rest of the city. The remaining 2,000 will be provided through very small developments across the city.

The City Plan projects an average build rate of 660 dwellings per annum, with our current rate being around 540 per annum. Brighton & Hove has high levels of population density, and new housing will be developed at between 50 – 100 dwellings per hectare, which is higher than some areas, but lower than others such as London. There is an expectation that this can lead to taller buildings within defined areas.

On the open market, the demand for housing is likely to be greatest for 2 and 3 bedroomed homes, comprising 70% of total demand. The remaining 30% is almost equally split between 1 bedroomed and 4 bedroomed homes.

The city has a higher proportion of renters and a lower proportion of home owners than the national average. This is mainly due to affordability pressures. Furthermore, types of housing to fit all stages of a resident's life cycle are not necessarily attainable in the city itself

Analysis has shown that certain groups, including young families, single people and couples are unable to stay in the city as their housing needs change. As people move to the greater Brighton area rather than the city itself, they often continue to work in the city. This demonstrates the need for strong transport infrastructure, particularly east – west to accommodate these moves and allowing the city to retain its workforce.

The city plan attempts to address affordability issues through the requirement to develop a proportion of affordable homes in every new development, though delivery of these needs to be understood in the context of a national government policy. For example, there is a current emphasis on starter homes for sale which is not necessarily the type of accommodation that meets the city's current need.

The city will also need to ensure that it uses all open space effectively; to meet the needs of a growing population more intensive use as well as dual use of open space will be required as well as better connection between, and better accessibility to, green spaces.

- **Education**

School Places - There has been an increase in the number of primary aged pupils in the city over the last 6 years. These pupils are due to increase the numbers of secondary school age children in the next 5 years, beyond the current capacity of the schools in the city. City Plan Part One has identified site for a secondary school at Toads Hole Valley and through CPP2 will consider whether further allocations required.

School performance continues to improve with the city achieving the most improved GCSE results in the country in 2015.

The City Council has commissioned research to look at the balance between the supply and demand for purpose built student accommodation in the longer term. This research is likely to indicate that, despite the site allocations in City Plan Part 1 for purpose built student accommodation and the additional development of a speculative schemes, there will remain a significant unmet need for PBSA.

If there is further university expansion, the size of unmet need is likely to grow.

- **Travel**

The City Plan contains the priority of making cycling and walking an attractive and safer option by improving the public realm and its design and by providing facilities (e.g. pedestrian way-finding and crossings and dedicated cycle routes).

The City Plan (specifically part 4) sets out a number of measures to help encourage cycling and walking as active forms of travel, when development proposals come forward. These include:

  - A list of priority areas for public realm improvements (key routes and areas);
  - Implementation of a citywide cycle network by 2030; and
  - Improving Rights of Way and access to the South Downs National Park

A Great Place to Work

- **Economic Growth**

The Greater Brighton Prospectus, Platforms for Productivity, states that the Greater Brighton Investment programme will deliver 224,000 sq. M of employment floorspace, 24,000 jobs and a total of 27,000 homes across the region (including those inside the National park)

The Brighton and hove component of this is identified in the City Plan as 96,000 sq. M of new office space and 9,500 Sq. M of industrial floorspace. This still leaves a shortfall for available employment space and assessed demand. Currently, vacant office space is at the lowest for 10 years and Brighton and Hove is identified as one of the cities that has a great opportunity for investment in office space over the next 5 years (*The New Geography of Office Demand, Where next in the UK Jones Lang LaSalle, 2015*)

Recent national changes to the planning system mean that there has been an impact on the supply of offices with a number being converted to housing. This change is likely to become permanent, though the City Plan consultation asks whether we should extend Article 4 planning restrictions to arrest this development.

The demand for industrial floor space remains strong, with modest growth in jobs in this sector forecast until 2030. Advanced manufacturing and engineering has been identified as a priority sector.

Recent analysis for Greater Brighton and Coastal West Sussex has indicated that there is a demand from small to medium sized businesses that have outgrown their current premises, but do not require large scale strategic sites to support their growth plans.

In terms of labour supply, there is evidence that younger and higher skilled people could relocate further afield as their housing aspirations are not met and their willingness to commute over a longer distance is not viable.

- **Employment and Skills**

The City Employment & Skills Plan (CESP) contains three priorities for the city and Greater Brighton region; the plan covers the next 4 years.

  - **Priority 1 – No one left behind:** Residents and workers suffering disadvantage in the labour market either through unemployment, low pay or lack of aspiration are supported effectively to make the most of the economic opportunity that the city and its wider partnerships can offer.
  - **Priority 2 – Supporting learn to earn transitions:** Young people and those making career transitions at any age are supported on their journey from learning to earning and can take

advantage of the career, lifestyle and further education opportunities that the city has to offer.

- **Priority 3 – Enabling businesses and workers to benefit from growth:** The key employment sectors of the city that are driving growth such as Creative, Digital & Information Technology (CDIT), and those which are critical to sustaining a healthy and vibrant city such as Financial Services, Public Sector and Tourism, are accessing employees with the right technical skills, aptitude and readiness for work. These employers are given support to help their workforce grow and prosper.

- **Travel to Work**

The transport needs of the Greater Brighton and Coastal West Sussex Region have been broadly assessed from the perspective of future economic and housing growth and three particular areas where transport has a role to play have been identified:

- **Improvements to the A27:** evidence suggests that this represents a significant constraint on east-west travel for business and commuting travel. Moving forward across the study area, housing and strategic site location will increase traffic on key strategic routes and the A27 (as well as the A259 and connecting roads), will be a focus for growth.
- **Rail and bus provision:** both north-south and east-west rail provision can help support growth and increase the in-scope geography for those seeking work or new business locations. The role of bus in improving connectivity for Adur, Worthing, Brighton & Hove and Newhaven can also support the development of housing and employment.
- **Mode shift:** Brighton & Hove has seen high levels of economic growth as well as shifts to non-car based modes. Enabling more mode shift across GBCWS, particularly in other urban areas may also support sustainable growth by creating headroom in the relationship between economic and traffic growth

A Great Place to Visit

- **Tourism**

Around 18 % of all jobs in the city are supported by the turnover generated through tourism. These include travel and transport, hospitality, leisure and retail sectors.

Tourism south East estimated that in 2014 that **£860M** worth of direct income was generated for local businesses through tourism. This is an increase of 5.3% on 2013.

In 2014 there were around 10 Million day trips to Brighton and Hove and an estimated 4.9 Million visitor nights, an increase of around 2.1% compared to 2013.

A Study in 2007 indicated that no new hotel provision was required within the city until 2016, and an update to this study will be undertaken this year.

The city's heritage and its contemporary mix of small- and medium-sized businesses in the creative, cultural and tourism sectors together give the city a particular character, identity and quality of life. These factors are critical to the city's attractiveness as a place to live, work, study and invest, and hence are key to the city's future local economic development.

The seafront is of considerable importance to the city as a much visited recreational resource by both residents and visitors alike. The seafront will be enhanced as a result of the regeneration proposals at Brighton Marina, the Black Rock site, Brighton Centre and Churchill Square Redevelopment area and Shoreham Harbour, and it will continue to play a major part in the cultural and tourism offer of the city and therefore contributes significantly to the visitor economy of the city.

- **South Downs**

With the South Downs National Park and international Biosphere Reserve status, there is good potential to grow the market for eco-tourism locally. This re-emphasises the point that what has sometimes been seen as a barrier to growth is an asset and advantage.

Key to the setting of the city is the wider South Downs landscape and its importance is nationally recognised through its National Park status. The city's location, adjacent to the national park, is one of its positive attributes and it is important that this is recognised and an understanding of and access to the South Downs National Park appropriately promoted.

The sites identified in the Urban Fringe Assessment, as indicated, provide routes through the city into the National Park. There is therefore potential for them to be identified as Gateway's to the National Park in addition to Stanmer Park which is promoted in City Plan Part One

- **Culture**

Brighton Festival 2015 featured 396 performances across 150 events including 45 exclusives, premieres and commissions and 34 free events.

Brighton Fringe estimates that there was a net £10M impact for the Fringe in 2014

According to the Brighton & Hove Economic Strategy 2013-18 the sectors that most stakeholders consider to be important to the city's economy are culture, leisure and tourism, and creative, digital and IT. The culture, leisure and tourism industry is not just important as a generator of jobs but also to the influx of leisure business and tourist income. This, coupled with one of the highest rates of engagement in culture amongst residents underpins the great cultural and artistic offer.

The city's overall quality of life offer as a result is enhanced, making it a great place to invest – it was named the third best place to invest in 2012- and this, together with factors such as its popularity on the annual party political conference scene clearly enables it to punch above its weight.