

BRIGHTON & HOVE OFFICE MARKET REPORT Q3 & Q4 2025

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Brighton & Hove Office Occupier Focus

MARKET OVERVIEW

Welcome to the latest edition of the Brighton & Hove Office Market Report, reflecting activity during the second half of 2025 and compiled by our dedicated office agents Ed Deslandes and Nick Martin at Flude Property Consultants.

Early optimism at the start of 2025 was gradually tempered by renewed global and domestic uncertainty. The introduction of further US trade tariffs and prolonged speculation ahead of the Autumn Budget led many occupiers to postpone property decisions.

Concerns centred on potential Labour policy changes, particularly around taxation and employment costs, resulting in a cautious approach across much of the year. Although the eventual announcements were more measured than feared, the extended period of uncertainty slowed decision making.

Despite this backdrop, the Brighton & Hove office market recorded approximately 182,000 sq ft of take up in 2025, a modest 4% increase on the previous year. This figure reflects all transactions above 500 sq ft across the city. By contrast, lettings over 2,000 sq ft within Brighton's core office areas totalled just 73,000 sq ft, down 33% on the previous year and highlighting the continued reduction in larger office requirements.

Activity was supported by several notable transactions, most significantly Flude Property Consultants' 26,000 sq ft letting at Hove Central, a new build mixed-use development on the site of the former Sackville Trading Estate, to a global technology consultancy.

This represents the largest office letting in the city since the Octopus Energy deal at Edward Street Quarter in early 2023 and establishes a new prime rental benchmark for Hove.

Vacancy levels remained broadly stable, with total availability ending the year at approximately 692,000 sq ft. Tenant favourable conditions therefore persisted, with occupiers benefiting from a wide choice of space and strong negotiating leverage. Increasingly, this has been used to secure improved lease renewal terms rather than relocate.

Over 100,000 sq ft less secondary stock was launched in 2025 compared with the previous year, reflecting landlord restraint and reluctance to bring poorer quality space to market in a highly selective environment, and an increase in landlords pursuing alternative uses for second hand space. Demand continues to focus on well located, energy efficient and well specified offices, while older and less efficient buildings face continued pressure on rents and incentives.



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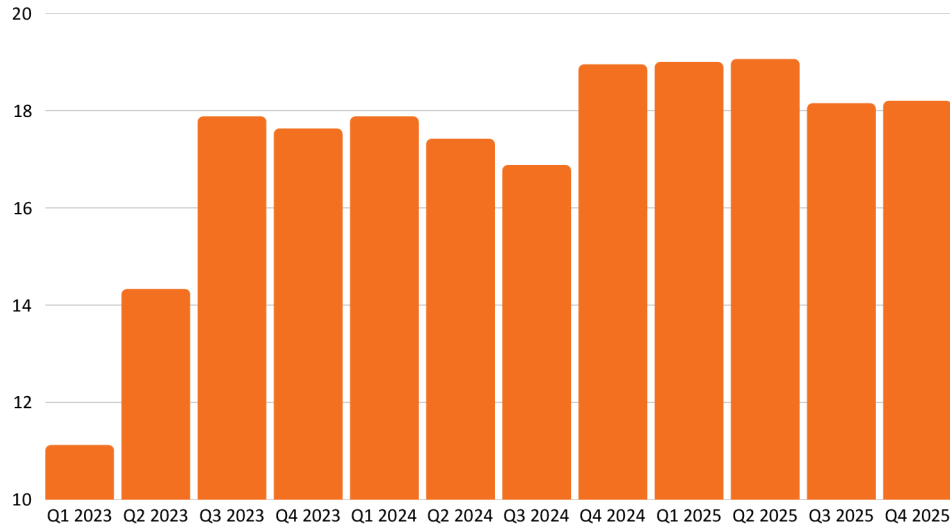
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Availability & Supply Trends

Vacancy Rate (%)

All Brighton & Hove office stock - minimum 500 sq ft



AVAILABILITY TRENDS

- Total availability averaged 695,000 sq ft across 2025, remaining broadly stable year on year.
- Secondary stock continues to dominate overall supply.

SNAPSHOT

Vacancy Rate:
Q4 2025

18.2%

Availability Change:
Q1 to Q4 2025

-2.4%

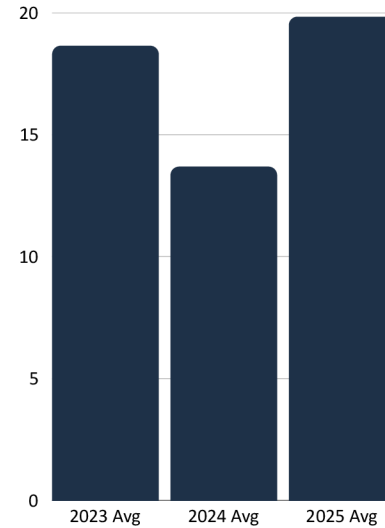
Total office availability across Brighton & Hove remained elevated throughout 2025, averaging approximately 695,000 sq ft. Vacancy peaked at 19.1% in Q2 before easing slightly to 18.2% by year end, reflecting subdued take up and the continued release of surplus space as occupiers recalibrate their requirements.

While there are signs of renewed activity, enquiry levels remain patchy and we expect only modest improvement in the near term, with vacancy likely to remain above historic norms.

The proportion of Grade A accommodation also increased, averaging 19.8% of total availability, reflecting new higher quality supply entering the market alongside a reduction in secondary stock being launched.

Grade A Availability %

Grade A as % of total vacant stock



NEW SUPPLY

- 219,000 sq ft of new space was introduced during 2025, significantly lower than in 2024.
- The proportion of Grade A space increased to 19.8% of total availability.
- New supply was driven primarily by a small number of significant schemes.

SNAPSHOT

New Supply Released
to the market:
2025 vs 2024

-32%

Grade A Availability:
Q4 2025

19.8%

Key New Availability

Q3 & Q4 2025



Hove Central, Sackville Road, Brighton
745 - 15,876 sq ft
£30 - £35 psf quoting



Wellesbourne, 137-147 Preston Road, Brighton
754 - 10,978 sq ft
ROA



3 Fleet Street, Brighton
2,865 - 8,614 sq ft
ROA



45 Church Road, Hove
728 - 5,879 sq ft
£18.50 psf quoting



Princes House, Queens Road, Brighton
5,197 sq ft
£27.50 psf quoting



177 Preston Road, Brighton
4,359 sq ft
£22 psf quoting

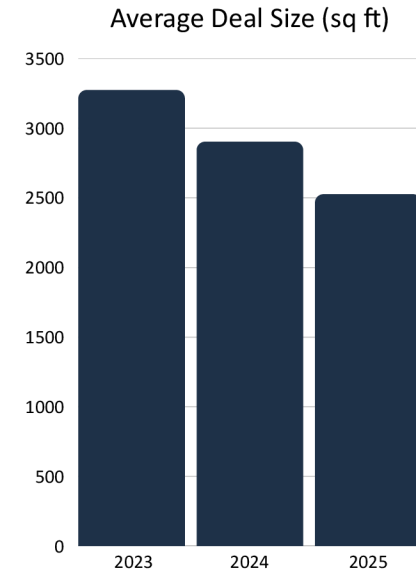
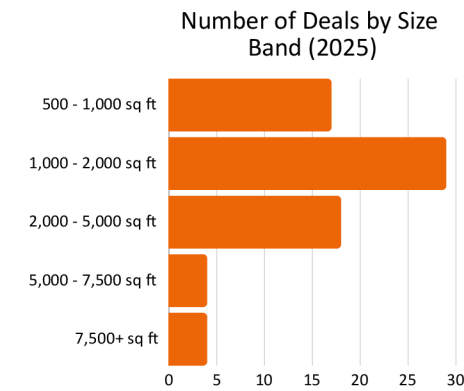
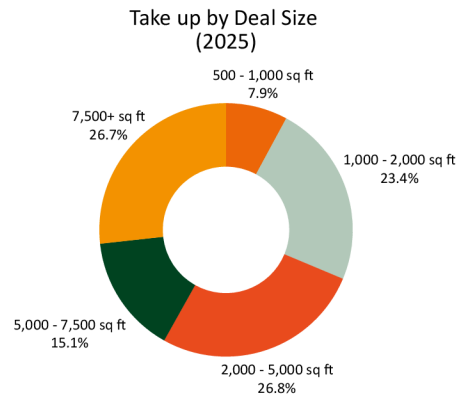


Castle Square House, 9 Castle Square, Brighton
2,074 - 4,207 sq ft
£33 psf quoting



3 Clifton Mews, Brighton
892 - 3,292 sq ft
£22 psf quoting

Take Up Trends



OCCUPIER TRENDS

The pattern of transactions during 2025 again shows how much of the Brighton & Hove office market is driven by smaller occupiers.

The majority of deals were below 2,000 sq ft, reflecting strong SME demand but also the lack of larger corporate requirements coming forward during the year.

For many occupiers, the focus has not been on taking more space, but on improving space quality and efficiency. Hybrid working patterns continue to shape requirements, with businesses often seeking better specified, well located offices that support staff retention and collaboration, while reducing overall occupational costs. As a result, a growing number of occupiers are consolidating into smaller, better configured suites rather than expanding into larger floorplates.

Larger transactions remain possible, but tend to be driven by specific one-off requirements rather than broad market momentum. Requirements above 5,000 sq ft were limited during 2025 and, where they did occur, were highly selective in terms of location, ESG credentials and specification. This continues to polarise demand, with prime and refurbished space attracting attention, while older secondary accommodation faces longer void periods and greater pressure on pricing and incentives.

Buildings capable of offering smaller suites, strong amenity provision or fitted space are best placed to capture occupier demand. By contrast, owners of larger, undivided or poorer quality stock may need to consider subdivision, capital expenditure or alternative strategies in order to remain competitive.

Top 8 Deals

Q3 & Q4 2025



Block A, Hove Central, Sackville Road, Hove
25,915 sq ft
Occupier: Global consultancy



3 Fleet Street, Brighton
8,000 sq ft
Occupier: Serviced offices



Ridgeland House, 165 Dyke Road, Hove
7,272 sq ft
Occupier: Fashion company



47 Middle Street, Brighton
4,414 sq ft
Occupier: Marketing agency



The Keep, Woolards Way, Brighton
3,197 sq ft
Occupier: Not-for-profit



110 Old London Road, Brighton
3,064 sq ft
Occupier: Housing association



Telecom House Preston Road, Brighton
2,578 sq ft
Occupier: Digital production

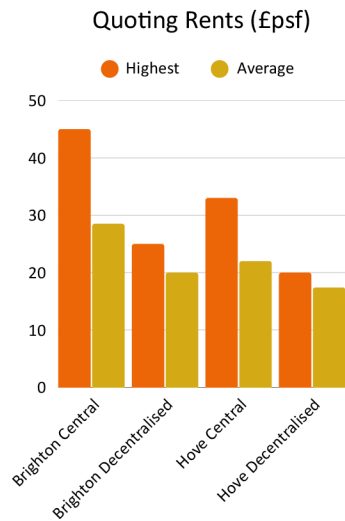


International House, Queens Road, Brighton
2,551 sq ft
Occupier: Educational software

MARKET HEADLINES

- Approx. 182,000 sq ft of office take-up was recorded across Brighton & Hove in 2025, up 4% on 2024.
- Lettings above 2,000 sq ft within Brighton's core office areas totalled around 73,000 sq ft, down 33% year-on-year.
- 63% of all transactions occurred below 2,000 sq ft, reflecting the dominance of smaller occupiers.
- Only 8 deals exceeded 5,000 sq ft during the year.
- Activity remains driven primarily by SMEs and professional service firms.
- Many occupiers are consolidating into smaller but higher quality space.
- Demand continues to favour well located, well specified offices suited to hybrid working.

Rental Trends



SNAPSHOT

£45 psf

Prime Quoting Rent: Q4 2025

£35 psf

Highest Achieved Rent: 2025

RENTS & INCENTIVES

Headline quoting rents across Brighton & Hove remained broadly stable during 2025, with best in class Grade A accommodation continuing to quote at up to £45 per sq ft. However, the market remains highly segmented, and the ability to achieve these headline rents is increasingly influenced by the scale of incentives required to secure occupiers.

The strongest evidence of pricing remains concentrated in a relatively small number of buildings, with Moore House, Black Lion Street, setting the benchmark for achieved rent during the year at £35 per sq ft.

Away from the prime market, rental performance remains much more mixed. Secondary offices, particularly older stock requiring refurbishment or offering weaker

environmental performance, continue to face downward pressure on both rents and leasing velocity. In many cases, landlords are having to compete through incentive packages, greater lease flexibility or capital expenditure commitments in order to secure interest.

Overall, while prime headline rents have held firm, effective rents across much of the market remain under pressure. This is particularly true in the secondary segment, where increased choice and tenant leverage continue to influence deal structures.

RENTAL VALUES

- Prime Grade A offices continue to quote at up to £45 per sq ft.
- The highest achieved rent recorded during 2025 was £35 per sq ft at More House, Black Lion Street.
- Achieved rents vary significantly depending on location, specification and lease flexibility.
- Secondary stock continues to face downward pressure on both rents and marketing periods, where achieved rents are typically moving 10-15% in order to get let.

INCENTIVES & LEASE TERMS

- Incentives remain a key feature of the market, with rent free packages typically ranging from 12 to 18 months on a 10-year term.
- Occupiers continue to seek flexibility through break options, shorter commitments and fitted space.
- Plug-and-play and CAT A+ accommodation is becoming increasingly attractive where it reduces upfront capital expenditure.
- Average lease lengths remain under some pressure as occupiers prioritise flexibility in an uncertain economic environment.

Key Insight

“While headline rents have remained broadly stable, incentives and flexibility continue to play a key role in securing lettings.”

Brighton Office Agency Team

CONCLUSION

The Brighton & Hove office market closed 2025 in a position of cautious stability. While overall take up saw a modest increase on the previous year, activity remained selective, with the majority of demand focused on smaller, well specified offices in central locations. Prime accommodation continues to attract the strongest interest, while secondary stock faces greater pressure on both rents and incentives.

Looking ahead, landlords able to offer high specification, flexible workspace are likely to remain best placed to capture occupier demand. In this context, expert advice and detailed local market knowledge remain more important than ever.

For further insights, or to discuss how these trends may impact your property decisions, please get in touch with a member of the Flude office agency and research team.



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About Us

Flude Property Consultants is an independent, regional firm of Chartered Surveyors regulated by the Royal Institution of Chartered Surveyors (RICS) who specialise in advising clients who own or occupy real estate. Our firm comprises three offices in Brighton, Chichester and Portsmouth with approximately 28 staff.

Our main areas of expertise include property agency, lease advisory (rent reviews, lease renewals and lease re-gearing), business rates, property management, real estate asset valuation and general consultancy (investment and development).

Flude operates from three offices across the south coast of Sussex and Hampshire and transact numerous lettings and sales on all types of commercial property within these counties. We therefore have first-hand experience of demand, supply and values in the region.

Flude has won a number of awards relating to commercial property. EG Radius and CoStar are the two largest analysers of commercial property transactions. Flude have won various awards from these organisations.

