



# Identifying Pro-Growth Locations in England

June 2018

**Turley**

# About Turley

We are a full service national planning and development consultancy.

Our Planning expertise is complemented by Design, Development Viability, Economics, EIA, Expert Witness, Heritage and Townscape, Landscape and VIA, Strategic Communications and Sustainability services. All services can be provided together or individually.

We help clients achieve good growth in all jurisdictions in the UK and we are located in major cities and growth areas.

Our teams are experts in their fields; they shape better places and achieve success for our clients.

**We bring deep thinking, smart strategy and expert delivery.**



# Our services

Many clients take advantage of our full service offer but all are available independently, working collaboratively with other consultant teams.

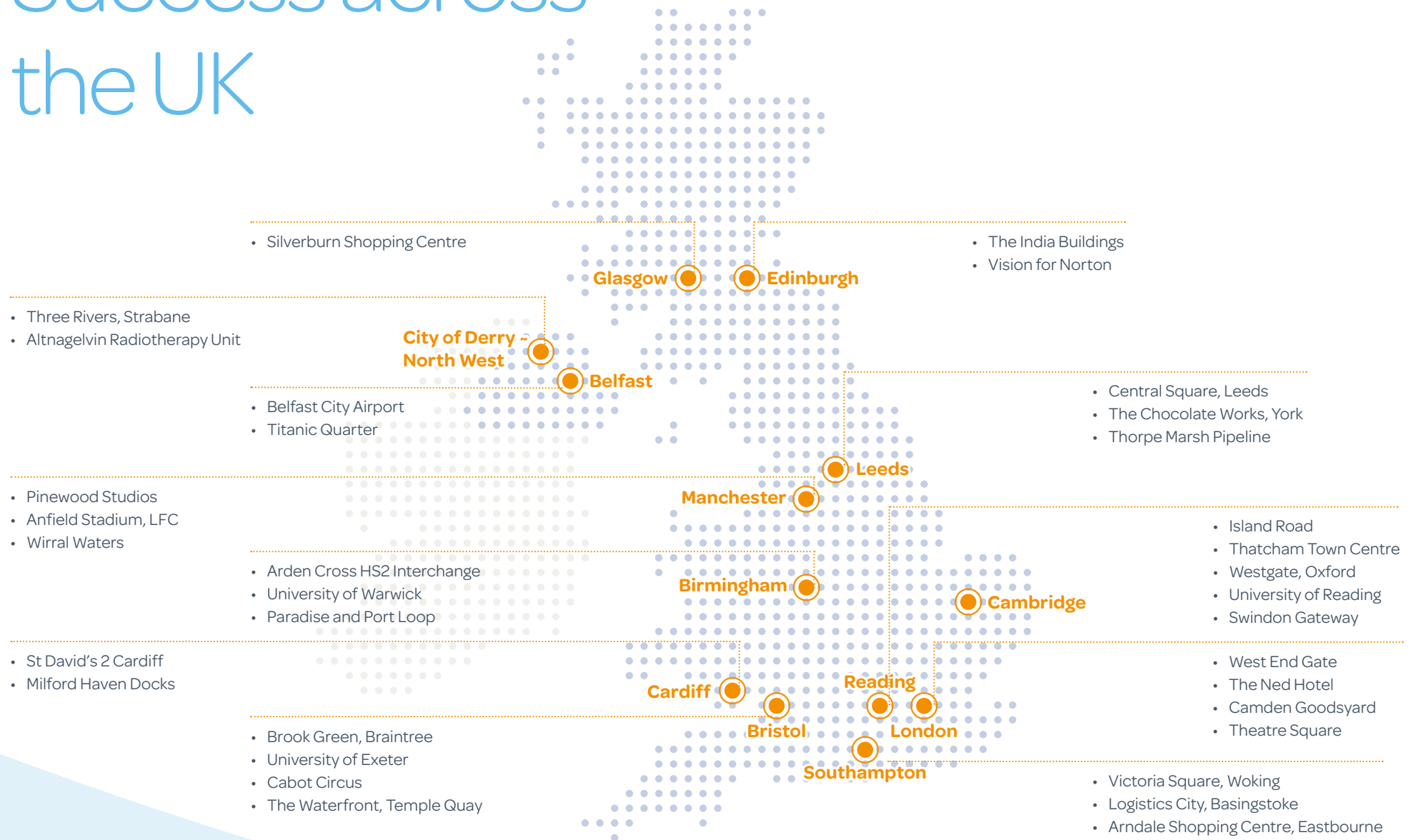
All our services are tailored to clients' needs and the objectives of the project.

We believe in good growth for our company, our clients and our communities.

For us this means authentic, sustainable and inclusive growth which demonstrates our values and benefits wider society.



# Success across the UK



In 2017 we expanded our UK presence by establishing a new office in Cambridge.

# Turley research: pro growth local authorities in England

## Our research methods...

- This research draws on the collective industry knowledge within our office network across the country and identifies authorities where our experience indicates a pro-growth agenda.
- Our Economics team has undertaken empirical analysis to categorise high performing authorities using the most recent data available for employment and housing growth.

## ... and our Outputs

- The following pages identify the Top 5 Big Players and the Top 5 Ones to Watch.
- We also highlight Local Authorities where changes in methods to calculate housing need generates the greatest increase from currently planned levels of housing provision.
- Finally, we have looked at areas where growth is likely to be driven by infrastructure investment.

# Pro-Growth Places

Using our industry knowledge to identify pro-growth places.

We have consulted with our eight England offices to find out which local authorities are 'pro-growth'. The results are presented here by area of the country.

We have established contacts in each of the LPAs that we have identified as pro-growth.

## 16 pro-growth LPAs in the North of England

Lancaster	Manchester	Hull
Tameside	Trafford	Leeds
Oldham	Blackburn	Sunderland
St Helens	Sefton	Middlesbrough
Wakefield	Warrington	
Wirral	Doncaster	

## 5 pro-growth LPAs in the Midlands

Birmingham	Tamworth
Wolverhampton	Leicestershire
Coventry	

## 5 pro-growth LPAs in the South West

Bristol	Cornwall
Wiltshire	East Devon
Swindon	

## 8 pro-growth LPAs in the East of England

Central Bedfordshire	Hertsmere
East Hertfordshire	Welwyn Hatfield
Three Rivers DC	Milton Keynes
Luton	Aylesbury Vale

## 17 pro-growth LPAs in London

Camden	City of London
Westminster	Croydon
Southwark	Lewisham
Kingston upon Thames	Brent
Newham	Ealing
Waltham Forest	Greenwich
Barking and Dagenham	Hackney
Enfield	Lambeth

## 13 pro-growth LPAs in the South of England

Portsmouth	Brighton	Wycombe
Southampton	Wokingham	Mid-Sussex
Havant	Bournemouth	Horsham
Eastleigh	Rushmoor	
Woking	Basingstoke	

# High performers

We have focused on two leading indicators: employment growth and housing growth.

We have assessed housing and jobs data for all 326 English authorities. We have filtered the data so as only to include those authorities exhibiting above median levels of growth across both housing and employment measures.

Using both absolute growth and percentage growth allows us to identify LPAs which are seeing increases in jobs and homes from a high or a low base. We call these the **Big Players** and the **Ones to Watch**.

Turley offices  
in England

# Strong performers in employment and housing growth

## Top 5 Big Players

High absolute growth and high percentage growth

### Jobs

- Tower Hamlets
- City of London
- Camden
- Southwark
- Islington

### Housing

- Manchester
- Tower Hamlets
- City of Bristol
- Southwark
- Milton Keynes

## Top 5 Ones to Watch

High absolute growth and moderate percentage growth

### Jobs

- Westminster
- Cornwall
- Manchester
- Leeds
- Hillingdon

### Housing

- Leeds
- Birmingham
- Liverpool
- Sheffield
- East Riding of Yorkshire

The following data sources have been used: DCLG (2017) Table 122: housing supply; net additional dwellings, by local authority.



# Planning for Future Housing Growth

The Government has expressed its intention to introduce a new standard method for calculating local housing needs, which is likely to apply for the purposes of examining Local Plans submitted from January 2019.

Consultation on its proposals in September 2017 was supported by the publication of indicative figures for every local authority, alongside their latest adopted housing requirements. The table opposite shows the authorities where implementation of the method as proposed could significantly increase planned levels of future housing growth.

Of the ten authorities expected to see the greatest uplift, nine are London Boroughs. On the basis that Boroughs' minimum housing requirements are statutorily set through the London Plan – enabling a degree of redistribution – London Boroughs have been omitted from the table presented opposite.

Local authority	Most recently adopted Local Plan number	Indicative assessment of housing need based on proposed formula	Difference	% difference
<b>Central Bedfordshire</b>	718	2,553	1,835	256%
<b>Birmingham</b>	2,555	3,577	1,022	40%
<b>Bristol</b>	1,530	2,420	890	58%
<b>Southend-on-Sea</b>	325	1,114	789	243%
<b>New Forest</b>	196	965	769	392%
<b>Sheffield</b>	1,352	2,093	741	55%
<b>Trafford</b>	578	1,319	741	128%
<b>Worthing</b>	200	865	665	333%
<b>Slough</b>	313	913	600	192%
<b>Stockport</b>	495	1,078	583	118%

Source: DCLG (2017) Planning for the right homes in the right places: consultation proposals.

Note: Housing need figures are shown per annum.

# Infrastructure Drives Growth

The National Infrastructure Assessment makes clear the links between infrastructure investment and economic development.

Reflecting the importance of infrastructure to the future pattern of growth in England, we have identified some of the most significant drivers of infrastructure led growth.

These provide an additional illustration of future growth locations.



The Cambridge – Milton Keynes – Oxford Corridor will experience significant investment. Precise details are not yet known.

# How can Turley help?

We can:

- share the latest industry insights from a local perspective
- provide you with introductions to councils and decision makers
- engage with councils on your behalf
- introduce you to developer partners
- support you in site finding through GIS application
- analyse relevant national and local policy changes

We are very well placed to offer this insight because of our national coverage with 13 regional offices all of which are well connected to local decision makers.

**For further information contact:**



**Amy Gilham**

Director, Economics

[amy.gilham@turley.co.uk](mailto:amy.gilham@turley.co.uk)

0207 851 4019

07709 184 086



**Maxine Kennedy**

Senior Consultant, Economics

[maxine.kennedy@turley.co.uk](mailto:maxine.kennedy@turley.co.uk)

0207 851 5725

07966 386 882

**Belfast**

Hamilton House  
3 Joy Street  
Belfast  
BT2 8LE  
t 028 9072 3900

**Birmingham**

9 Colmore Row  
Birmingham  
B3 2BJ  
t 0121 233 0902

**Bristol**

40 Queen Square  
Bristol  
BS1 4QP  
t 0117 989 7000

**Cambridge**

1010 Cambourne  
Business Park  
Cambridgeshire  
CB23 6DP  
t 01223 598 005

**Cardiff**

18 Windsor Place  
Cardiff  
CF10 3BY  
t 029 2034 4445

**City of Derry-North West**

37 Clarendon Street  
Derry-Londonderry  
BT48 7EG  
t 028 7126 2634

**Edinburgh**

26 Dublin Street  
Edinburgh  
EH3 6NN  
t 0131 240 5440

**Glasgow**

100 West George Street  
Glasgow  
G2 1PP  
t 0141 204 7390

**Leeds**

1 Park Row  
Leeds  
LS1 5HN  
t 0113 386 3800

**London**

8th Floor, Lacon House  
84 Theobald's Road  
London  
WC1X 8NL  
t 020 7851 4010

**Manchester**

1 New York Street  
Manchester  
M1 4HD  
t 0161 233 7676

**Reading**

The Pinnacle  
20 Tudor Road  
Reading  
RG1 1NH  
t 0118 902 2830

**Southampton**

2 Charlotte Place  
Southampton  
SO14 0TB  
t 02380 724 888

[turley.co.uk](http://turley.co.uk)

 [@turleyplanning](https://twitter.com/turleyplanning)

 [linkedin.com/company/turley](https://www.linkedin.com/company/turley)

# Turley