LONDON TALL BUILDINGS SURVEY

2019
This NLA Research Paper is published by New London Architecture (NLA) in March 2019. It is an annual publication, developed with research partner GL Hearn, delivering up-to-date figures and analysis of the London tall buildings pipeline and is part of the year-round NLA Tall Buildings programme, bringing together industry experts and the public to discuss one of the capital’s most debated topics.
EXECUTIVE SUMMARY

541 TALL BUILDINGS IN THE 2018 PIPELINE, UP 6% FROM 510 IN 2017

PRE-PLANNING: 54
PLANNING: 75
PERMISSION: 291
UNDER CONSTRUCTION: 121

2% APPLICATIONS DOWN
3.8% PERMISSEIONS RATE UP
14% PRE-PLANNING: 54
PLANNING: 75
PERMISSION: 291
UNDER CONSTRUCTION: 121

TALL BUILDINGS IN THE 2018 PIPELINE, UP 6% FROM 510 IN 2017
STARTS ON SITE DOWN
APPLICATIONS DOWN
PERMISSEIONS RATE UP
PRE-PLANNING: 54
PLANNING: 75
PERMISSION: 291
UNDER CONSTRUCTION: 121

50% OF WHAT WAS PREDICTED
BETWEEN 30 AND 60+ STOREYS
IT IS ESTIMATED THAT APPROXIMATELY
NEW HOMES COULD BE PROVIDED
BY THE TALL BUILDINGS IN THE PIPELINE

62% OF THE TALL BUILDINGS PIPELINE ARE BUILDINGS OF 20-29 STOREYS
38% BETWEEN 30 AND 60+ STOREYS
IT IS ESTIMATED THAT APPROXIMATELY
NEW HOMES COULD BE PROVIDED
BY THE TALL BUILDINGS IN THE PIPELINE

EAST 48%
CENTRAL 18%
EAST AND CENTRAL SUB-REGIONS REMAIN THE AREAS WITH THE LARGEST NUMBER OF TALL BUILDINGS, BUT SOUTH AND WEST HAVE INCREASED BY 1% AND 2% RESPECTIVELY

INNER 366
OUTER 175
3% INCREASE IN THE PROPORTION OF TALL BUILDINGS IN OUTER LONDON

MOST NOTICEABLE CHANGES FROM 2017 TO 2018
BARKING & DAGENHAM
+7 BUILDINGS
BRENT
+5 BUILDINGS
EALING
+7 BUILDINGS
GREENWICH
69 BUILDINGS
TOWER HAMLETS
84 BUILDINGS
SOUTHWARK
51 BUILDINGS
HAMMERSMITH & FULHAM
43 BUILDINGS

46% OF THE WHOLE TALL BUILDINGS PIPELINE IS CONTAINED IN
The model of central London, on display in the NLA Galleries, is instructive for anyone wishing to understand the physical changes that are taking place in the capital as a result of new development and increased densification. Certain areas, dotted across the model, stand out above the rest: opportunity areas like White City, Earls Court, Nine Elms, Elephant and Castle, Greenwich Peninsula, Canary Wharf, Stratford, the City and Kings Cross are clusters of taller buildings of a wide variety of heights set in large areas of lower rise London.

This is likely to be the shape of the skyline for the next couple of decades, at least: pockets of taller buildings located in those boroughs that are willing to accept them. There is no London-wide strategy for taller buildings. Each borough seems able to determine its policies based on the reactions of its voters and its need for additional housing. Comfortable Bromley—the essence of suburban London—has none; Tower Hamlets, less than half the size, has lots.

This year’s research confirms that tall buildings are now an established component of London’s development programme; in spite of the current political uncertainty the pipeline remains steady. These buildings are not super tall; they are generally between 20 and 30 storeys. Even Westminster, a borough known for its conservative views on tall buildings, has proposed 20 storeys as being acceptable in the Paddington opportunity area following extensive consultation with residents.

Tall buildings are normal. The NLA’s annual stats do not generate the cries of protest they once did. LSE has recently published research that shows that tall buildings work well for younger occupiers who then move when they have a family. They work less well for families—but we have known that since the 70s. In spite of this increased acceptance, we still must remain vigilant to the quality of design of tall buildings both in their impact on the skyline and how they hit the ground. NLA continues to call for the greater use of computer modelling by planners to assess the impact of taller buildings and will do so until City Hall has the capability to draw together data from all boroughs in order to better understand the wider and cumulative impact of new proposals.

Peter Murray,
Chairman,
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The number of tall buildings in the pipeline has again increased in 2018, which is consistent with recent trends. An increase in proposals has emerged in outer London boroughs, where there are more buildings in the pipeline as transport networks and brownfield sites continue to emerge alongside schemes for alternative types of living, such as co-living and build to rent. The amount of planning applications—75 in 2018 against 78 the previous year—suggests a continuing appetite for tall buildings despite the economic uncertainties the UK faces. With more planning approvals in 2018 than 2017 and a slower rate of completions across the pipeline, the total number of tall buildings in the pipeline continues to build up. The current pipeline now stands at 541 buildings for the year 2018, up from 510 in 2017.

For the purpose of this research, and consistent with previous years’ London Tall Buildings Surveys, tall buildings have been here defined as buildings of 20 storeys or above in height, that are at various stages from pre-planning to construction; including tall buildings at pre-application discussions and Environmental Impact Assessment (EIA) states (‘Pre-application’); formally submitted (‘Applications’); with planning permissions (‘Permissions’) or already under construction (‘Under Construction’). The data refers to the period from 1st January 2018 until 31st December 2018.

APPLICATIONS

The number of planning applications for tall buildings in 2018 fell slightly on the previous year, decreasing from 78 to 75. 2015 continues to have the highest amount of planning applications for tall buildings on record, due largely to the submission of the Greenwich Peninsula proposals for over 40 tall buildings. If this scheme is discounted, there has been a very slight downward trend in applications since 2014.

PERMISSIONS

2018 saw an increase in planning permissions with 72 being granted as opposed to 63 the previous year, which suggests that while the number of planning applications is decreasing, a higher proportion of tall buildings proposals are seeing success at Planning Committee. Only eight applications for tall buildings were refused in 2018. These refusals were in the boroughs of Hounslow, Kensington & Chelsea, Greenwich, Bromley and Croydon.

STARTS

38 tall buildings commenced construction in 2018, which is a decrease of two from the previous year. This is also a decrease from 2016 where 53 buildings started construction, the highest amount for any year. This is generally in line with the trend of slightly decreasing planning applications submitted over the last couple of years.

COMPLETION

25 tall buildings were completed in 2018, an increase from 18 in 2017. However the number of completions in 2018 was only half of what was expected—according to last year’s report, it was predicted that over 50 tall buildings would have been completed in 2018, yet just 25 completed construction. This has resulted in a push back of completions towards 2019, with 76 buildings expected.

Further analysis has indicated that tall buildings are taking longer to complete. This can be for multiple reasons, such as skills shortages, changing project delivery timescales and financial viability issues. In other cases, over-optimistic predictions can play a role in increasing the number of expected completions in a certain year, however, in considering the statistics of the preceding two years it is conceivable that more than 60 tall buildings could be completed in 2019.
LONDON SUB-REGIONS

The East London sub-region contains the largest number of tall buildings proposed, approved and under construction, counting for almost half of the entire tall buildings pipeline, at 48%, with 257 tall buildings. However, in comparison with 2017 findings, the proportions of tall buildings in the South and West sub-regions have respectively increased by 1% and 2%, whilst the East and Central sub-regions have decreased by 2% and 1%; the North sub-region remains stable. Overall, there has not been any significant change within any of the sub-regions.

Further analysis is undertaken throughout the report seeking to unravel characteristics of these trends. For example, the subtle change to the proportion of tall buildings in the East sub-region accounts for submissions of only three new planning applications with each having multiple tall buildings such as Stratford Island in Newham (two tall buildings) and Westferry Printworks in Tower Hamlets (four tall buildings).

WEST-90 BUILDINGS
Hillingdon, Harrow, Ealing, Hounslow, Richmond-upon-Thames, Hammersmith & Fulham, Brent

NORTH-34 BUILDINGS
Barnet, Enfield, Haringey

CENTRAL-96 BUILDINGS
Kensington & Chelsea, Westminster, Camden, Islington, City of London, Southwark, Lambeth

EAST-257 BUILDINGS
Hackney, Tower Hamlets, Lewisham, Greenwich, Bexley, Waltham Forest, Redbridge, Havering, Barking & Dagenham

SOUTH-62 BUILDINGS
Kingston-upon-Thames, Merton, Wandsworth, Croydon, Bromley

INNER AND OUTER LONDON

The vast majority of proposals including tall buildings are located within Inner London, however in 2018 a noticeable increase of 3% has been seen in the proportion of tall buildings within Outer London, which translates into 175 tall buildings, 28 more than those found in 2017.

Out of 20 Outer London boroughs, only 13 have tall buildings in the pipeline. In particular, six of them—Barking & Dagenham, Barnet, Brent, Croydon, Ealing and Newham—comprise 86% of the tall buildings located in Outer London, equivalent of 150 tall buildings out of 175. There are a range of factors contributing to the rise of tall buildings in Outer London:

- Comparatively lower land values and increased housing targets—encouraging developers and local planning authorities to consider higher density schemes
- Improved transport connections—with Crossrail influencing areas such as Ealing and Southall in the west and Ilford and Canning Town in the east
- Outdated shopping centres and estate regeneration programmes replacing existing stock with tall buildings.

Of note is the steady nature of the Barnet and Newham tall buildings pipelines which remain at 22 and 39 tall buildings respectively. There have not been any new tall buildings proposed in Barnet but the Brent Cross development (18 tall buildings) will likely progress, as building works which were due to start in May 2018 have been delayed to 2019 due to an Inquiry into the 370 hectares Compulsory Purchase Order. In Newham, large schemes include the 2012 Olympic Site (four tall buildings), Parcel Force Site (nine tall buildings), UCL East (four tall buildings) and Westfield Stratford (three tall buildings) which are still pending a decision, and have been for a couple of years.