



New London Architecture: London Tall Building Survey

Summary of findings 2014 – 2018

August 2019

Survey background

New London Architecture (NLA) describes itself as:

'an independent forum for discussion, debate and information about architecture, planning and development in London'

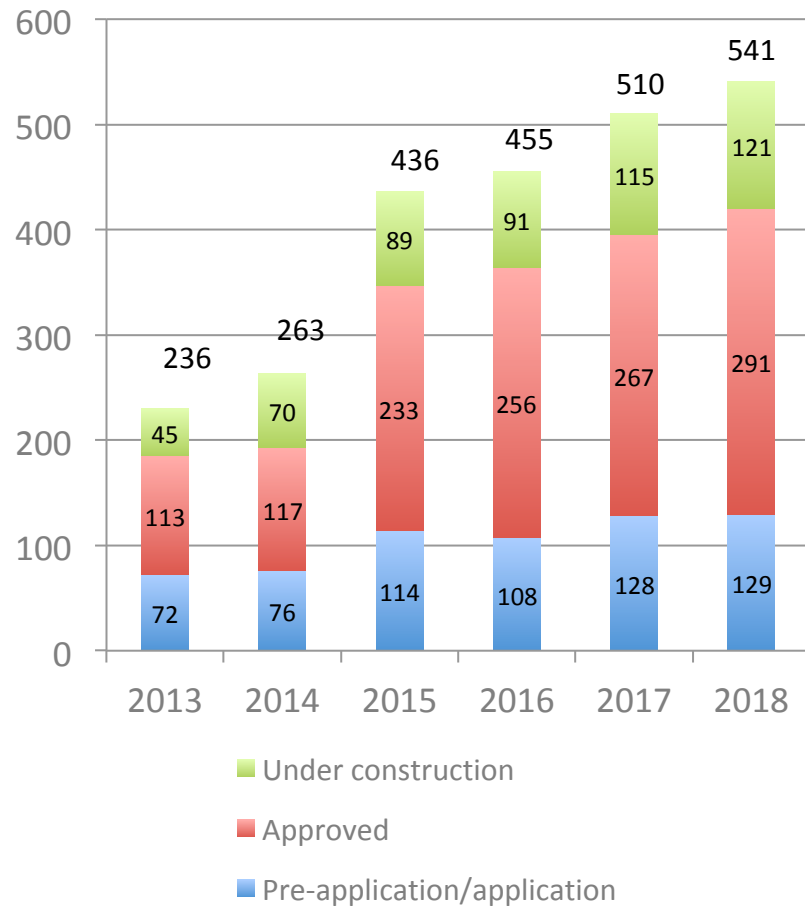
NLA, together with G L Hearn, a property consultancy owned by Capita Plc, has been producing an annual snapshot of the planning and construction status of buildings of 20 storeys or more across London since 2014. NLA has sought to improve the scope and quality of data produced with each report.

- The 2016 report in particular marked the start of NLA's access to Egi (Estates Gazette's database) and enabled it to be more exhaustive in its tracking of tall buildings by expanding the timeframe covered by each report from two years to five years.
- The survey period also changed from March of one year to February of the next to calendar year from the 2017 report.

The effect of these changes has been to impair the comparability of the data over time. It should also be borne in mind that not all developments will reach the end of the pipeline, due to the refusal of planning applications, the failure to build despite planning permission etc. The survey nevertheless indicates the direction of travel.

Please note that each of NLA's annual reports refers to the pipeline in the preceding year. All charts quote the year to which the data relate rather than the year of publication.

Tall buildings evolution in London



This chart shows the number of buildings in the different stages of the planning pipeline for London as a whole. As mentioned previously, data obtained for 2015 onwards were more exhaustive than those covered earlier, which may partially explain the step change in number of tall buildings in the pipeline after 2014.

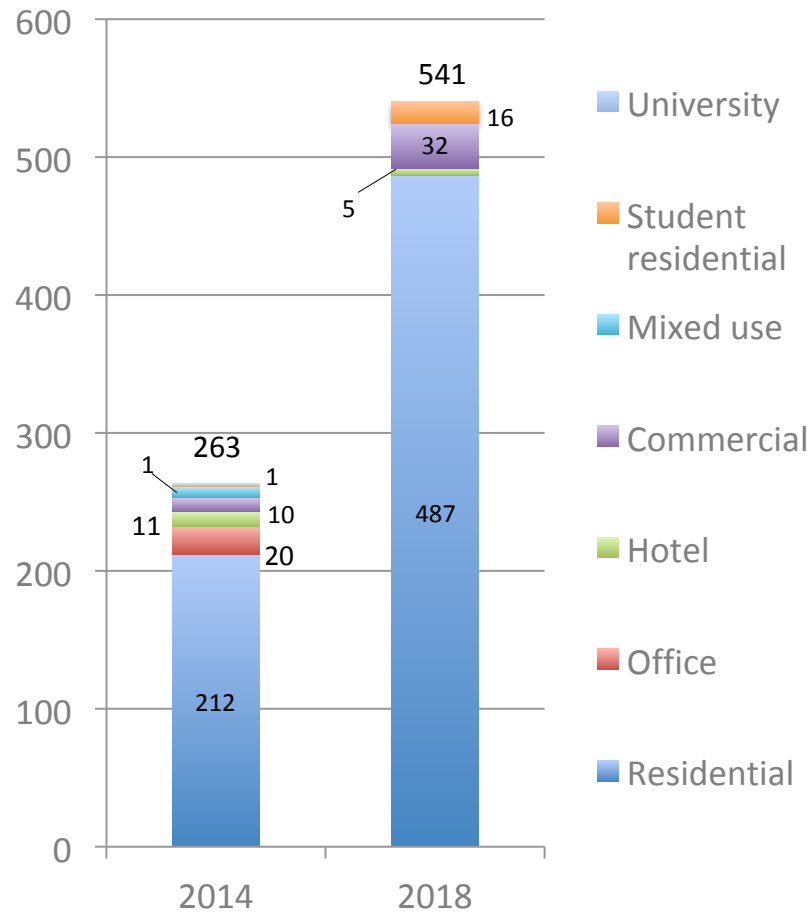
Even taking only the later comparable years into account, the overall number of tall buildings in the pipeline increased by almost a quarter (24%) over the three year period between 2015 and 2018. The number under construction saw the largest increase (36%), while those at the pre-planning application or planning application stage saw the smallest increase (though still a healthy 19%).

NB 2013 –14 reports cover the pipeline over a 2 year period, 2015 – 18 over a 5 year period

Source: New London Architecture

Tall buildings evolution

Primary use

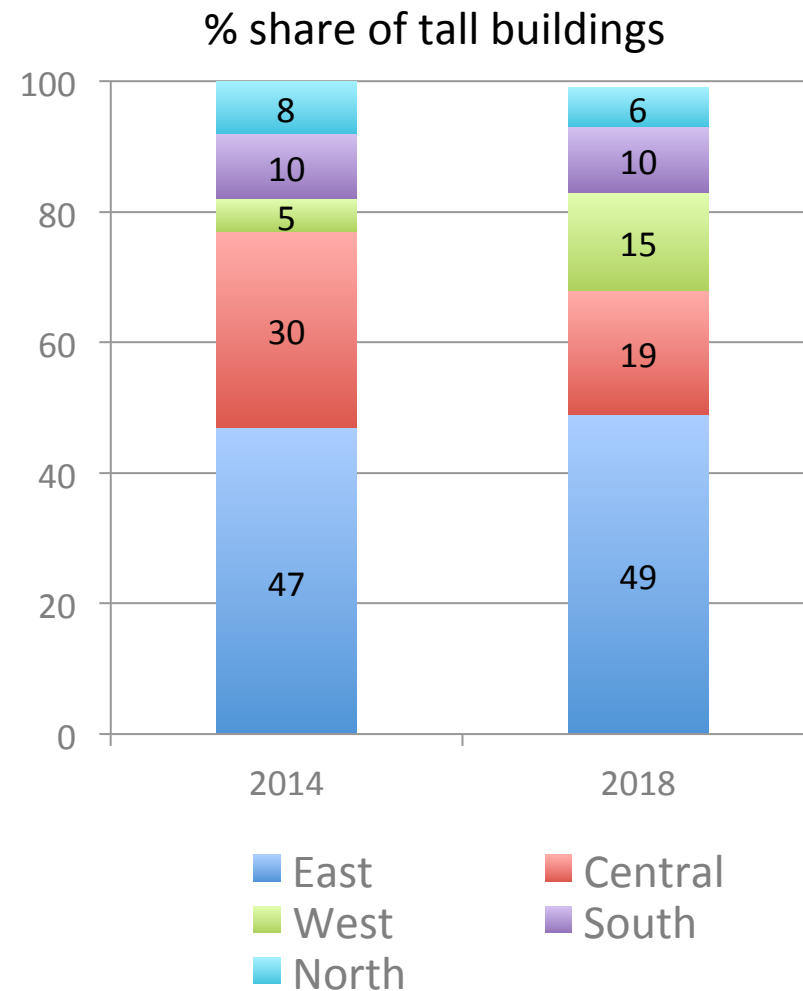
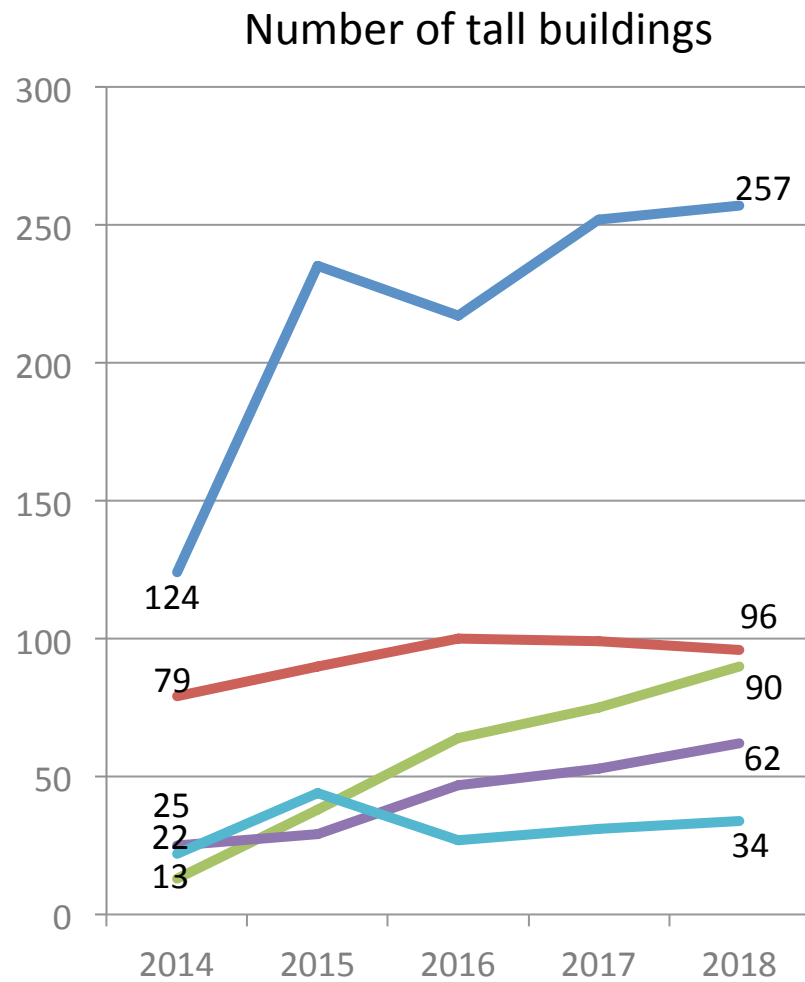


This chart shows the number of tall buildings in the planning pipeline across the capital measured in 2014 and 2018 and split according to the primary use of the building.

Residential was by far the most common primary use in both years. Additionally residential increased its slice of a bigger cake from 81% in 2014 to 90% in 2018. Student accommodation saw the largest increase in 2018 over 2014 (from one building to 16), and if this is included, residential was the primary use of 93% of tall buildings in the pipeline in 2018.

Commercial property was the only other type to show a gain, from 10 buildings in 2014 (4%) to 32 in 2018 (6%). The number of office, mixed use and university uses all reduced to zero in 2018, and hotels accounted for only 5 buildings in that year (1% of the total) compared with 11 (4%) in 2014.

Tall buildings evolution by sub-region



Source: New London Architecture

Tall buildings evolution by sub-region

The charts on the previous page examine the number of tall buildings in the pipeline over time and the share accounted for by each geographical sub-region defined as follows:

East: Tower Hamlets, Newham, Lewisham, Greenwich, Hackney, Redbridge, Waltham Forest, Barking and Dagenham, Havering and Bexley

Central: Southwark, Lambeth, City of Westminster, City of London, Camden, Islington and Kensington & Chelsea

West: Hammersmith & Fulham, Hounslow, Ealing, Brent, Harrow, Hillingdon, and Richmond upon Thames

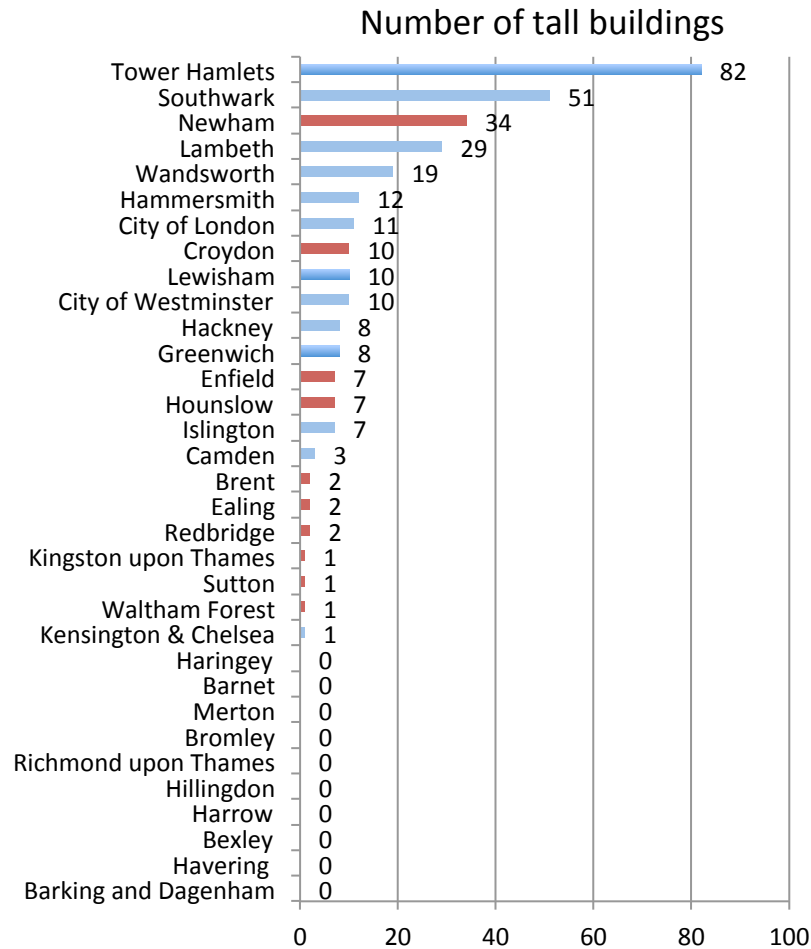
South: Wandsworth, Croydon, Sutton, Kingston upon Thames, Bromley and Merton

North: Enfield, Barnet, Haringey

With regard to tall buildings in the London pipeline between 2014 and 2018:

- The Eastern sub-region has accounted for far and away the largest number and continues to do so.
- While still the second most prolific, the Central sub-region showed least growth (+22%) compared with all the other sub-regions over the period.
- The Western sub-region showed by far the greatest growth (+592%), increasing its share of tall buildings in the pipeline from 5% to 15%.
- The Southern sub-region showed the second highest growth rate (148%), and maintained its share.
- By contrast the Northern sub-region grew more slowly (+55%) than all but the Central sub-region, reducing its share of tall buildings in the London planning pipeline.

Existing tall building stock



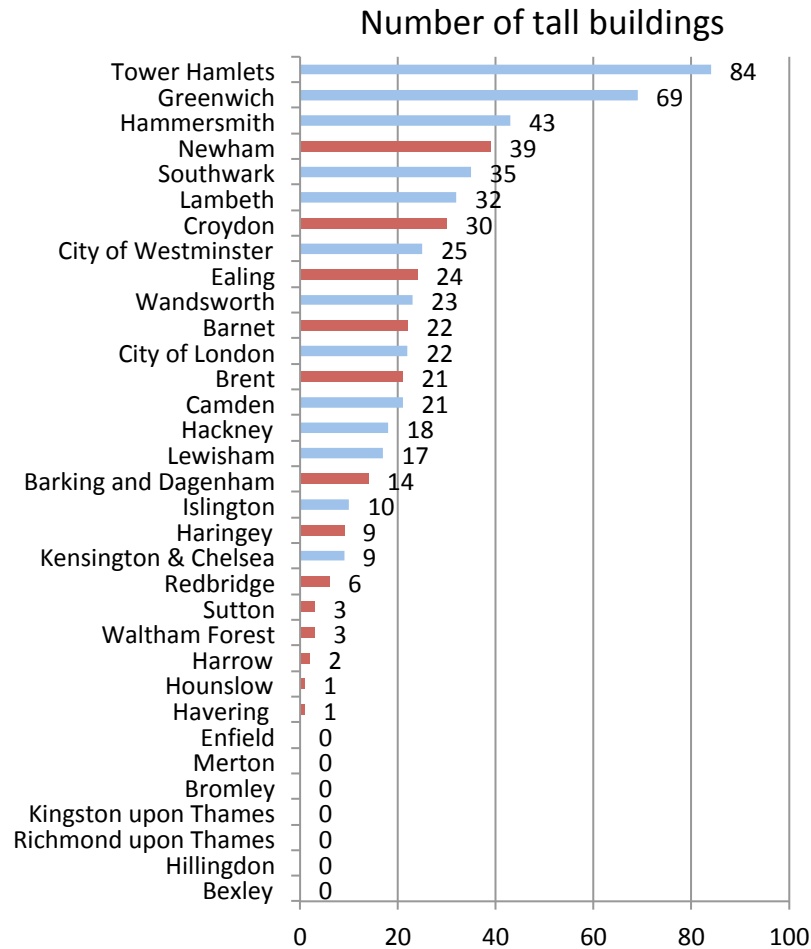
In its 2019 report the NLA introduced for the first time an analysis of the existing tall building stock across London, defined as those constructed from 1950 onwards. This chart shows the existing tall building stock within each borough from most to least.

Tower Hamlets stands out with its 82 existing towers, followed by Southwark with 51.

The chart demonstrates that tall buildings have been a substantially inner London phenomenon (the blue bars). Exceptions to this are Newham and Croydon albeit with much smaller numbers of tall buildings than the leaders.

While most outer London boroughs have at least one or two existing tall buildings, there were 10 boroughs without any existing tall building stock in 2018, all of them in outer London.

Tall buildings in 2018 pipeline



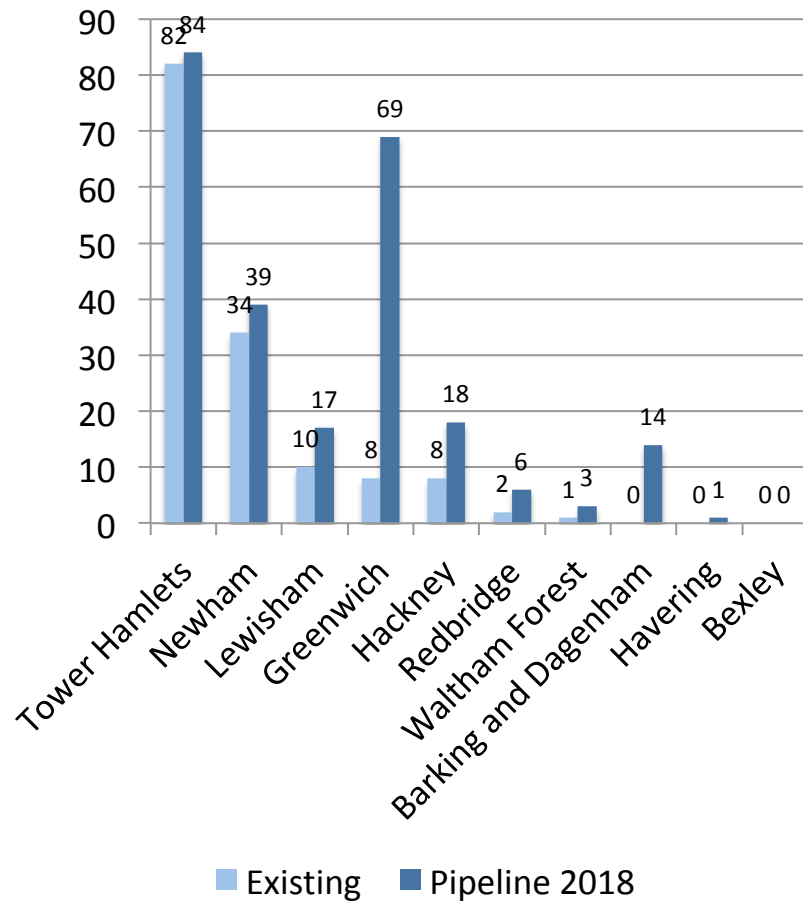
This chart shows the number of tall buildings in the 2018 pipeline. While Tower Hamlets continues to outstrip the other boroughs, there have been sharp increases in Greenwich and Hammersmith & Fulham, both inner London boroughs.

It is also worth noting that the number of tall buildings in the pipeline now exceeds existing stock in many boroughs, including those in outer London. Ealing is one such borough where the number of tall buildings in the 2018 pipeline is massively larger than its existing stock.

Despite this overall evolution, seven outer London boroughs have continued to resist the trend towards tall buildings.

Tall buildings evolution

Eastern boroughs

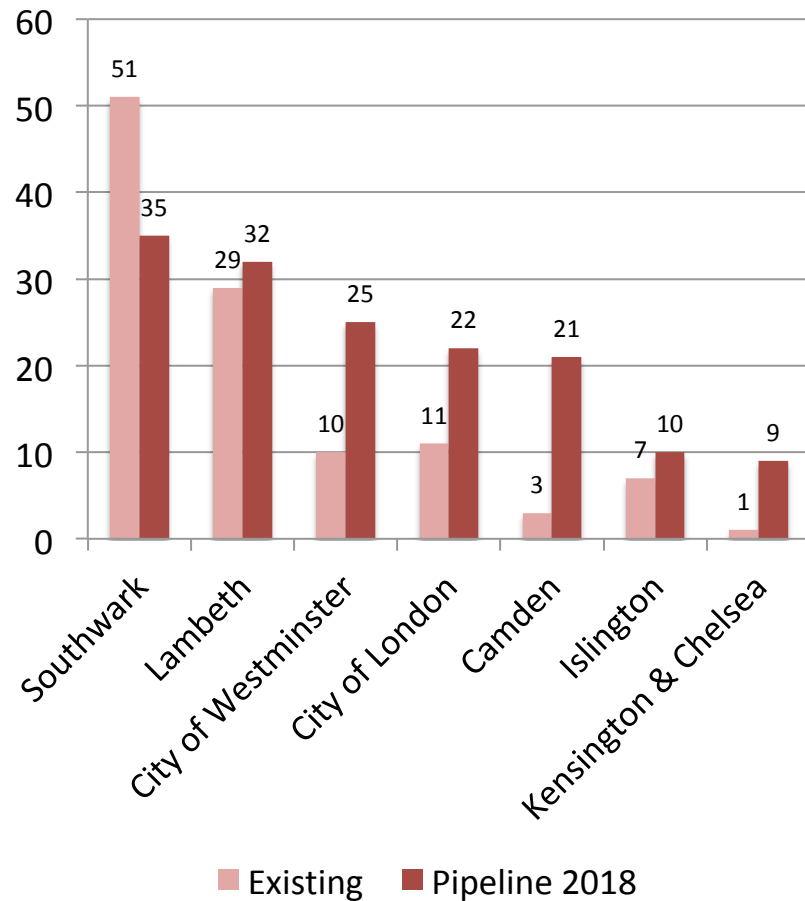


This chart looks at the Eastern sub-region in more detail comparing tall buildings in the pipeline in 2018 with the existing stock defined as those constructed from 1950 onwards.

Since 1950 Tower Hamlets has been home to by far the greatest number of tall buildings in the sub-region, with over two and a half times as many as Newham, the next highest. Three boroughs had no existing tall building stock: Barking and Dagenham, Havering and Bexley.

The pipeline in 2018 has seen increases in tall buildings over existing stock in all boroughs except Bexley, which continues to have none. By far the greatest increase has been in Greenwich, led by the Greenwich Peninsula development, with a 762% increase in tall buildings in the pipeline compared with existing stock. This contrasts with Redbridge, Waltham Forest and Havering where the number of tall buildings in the 2018 pipeline remains in single figures.

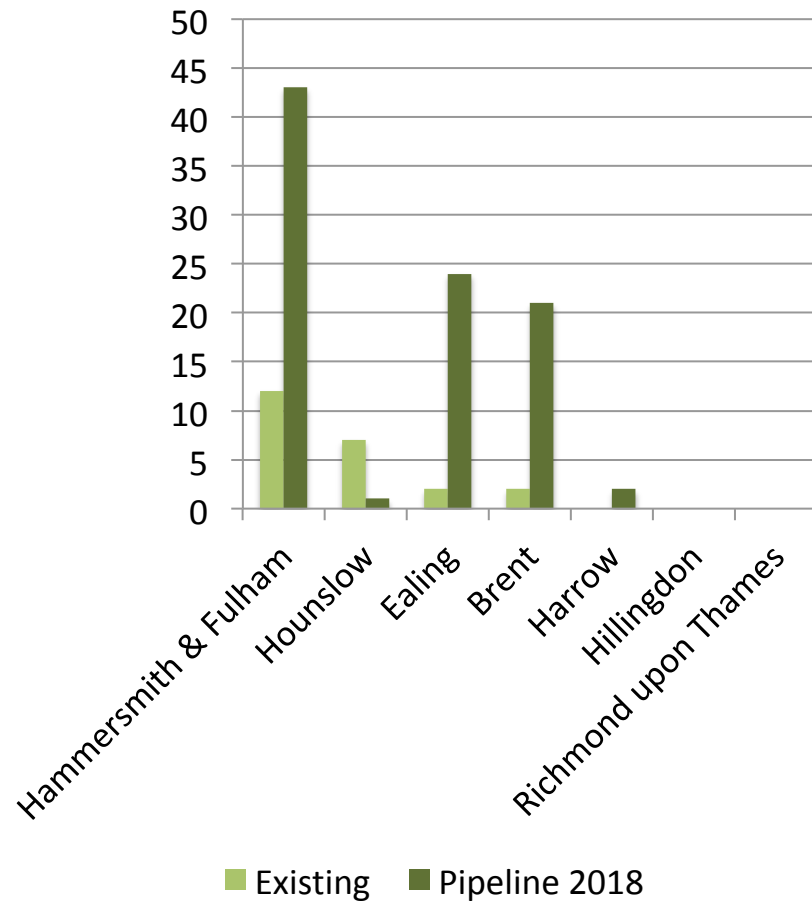
Tall buildings evolution Central boroughs



In the Central sub-region:

- Southwark has the largest existing stock of tall buildings, followed by Lambeth with just over half as many and the Cities of Westminster and London with a fifth of the number.
- Almost a third fewer tall buildings were in the 2018 pipeline in Southwark compared with its existing stock, the only Central borough showing negative growth. Likewise the pipeline in Lambeth was only marginally higher than the borough's existing stock. While the 2018 pipeline in the Cities of Westminster and London were twice as high as existing stock, the highest growth was in the two boroughs with the least existing stock, namely Camden (+600%) and Kensington & Chelsea (+800%).

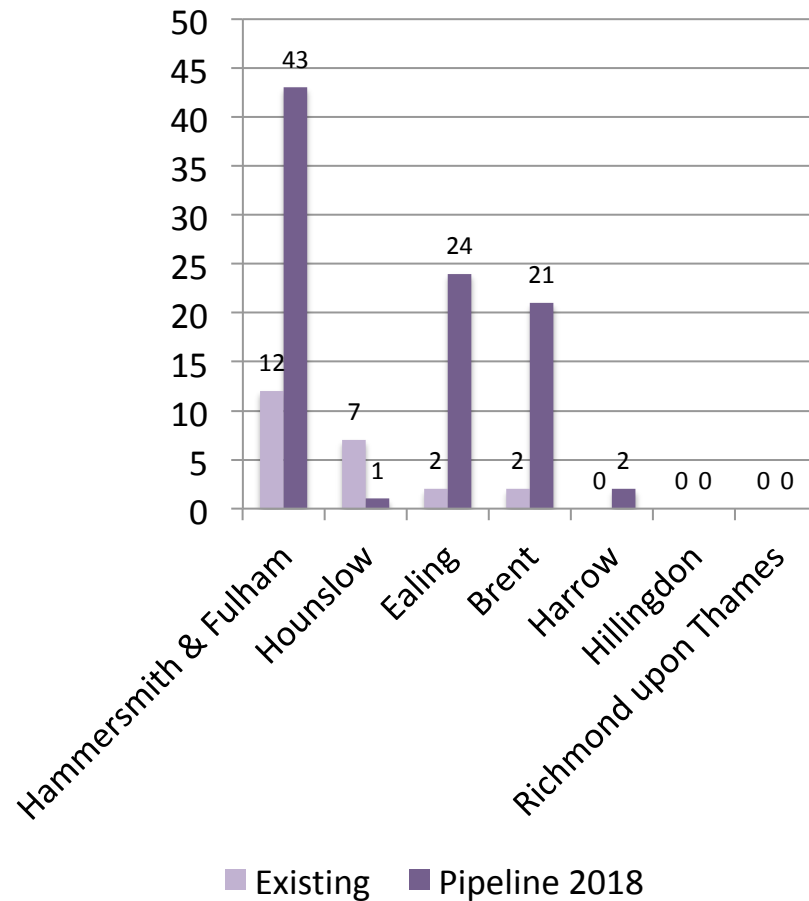
Tall buildings evolution Western boroughs



In the Western sub-region:

- Compared with many of the boroughs in the Eastern sub-region and much of the Central sub-region, the existing stock of tall buildings was negligible or non-existent in all boroughs apart from Hammersmith & Fulham and Hounslow (with 12 and 7 towers respectively).
- Hammersmith & Fulham continues as home to the largest number of tall buildings with 258% more in the 2018 pipeline than its existing stock. Ealing, with the ninth highest number of tall buildings in the 2018 pipeline, and Brent are facing even more face-changing increases of 1,100% and 950% respectively.
- At the same time Hillingdon and Richmond upon Thames with no existing tall building stock had none in the 2018 pipeline either.

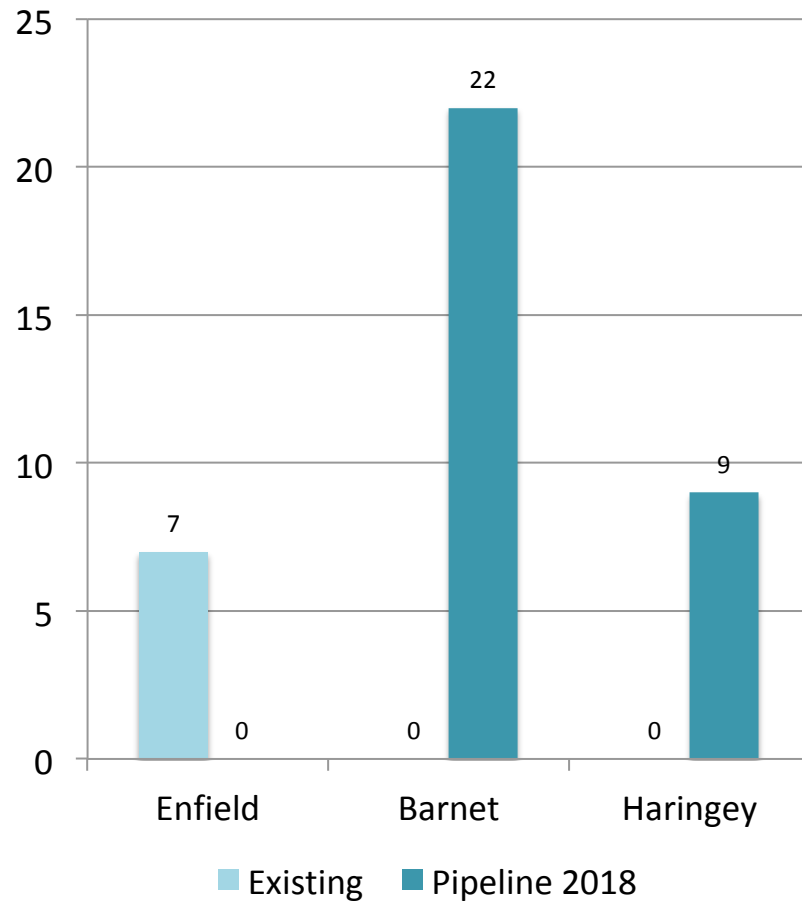
Tall buildings revolution Southern boroughs



In the Southern sub-region:

- Wandsworth and Croydon stand out both for their existing stock of tall buildings and plans for a still greater number of new towers in the 2018 pipeline. Two of the boroughs, Bromley and Merton, had no existing stock of tall buildings.
- While the increase in Wandsworth is relatively small, Croydon saw three times as many tall buildings in the 2018 pipeline as in their existing stock.
- Three of the Southern boroughs, Kingston upon Thames, Bromley and Merton had no tall buildings in the 2018 pipeline.

Tall buildings evolution Northern boroughs

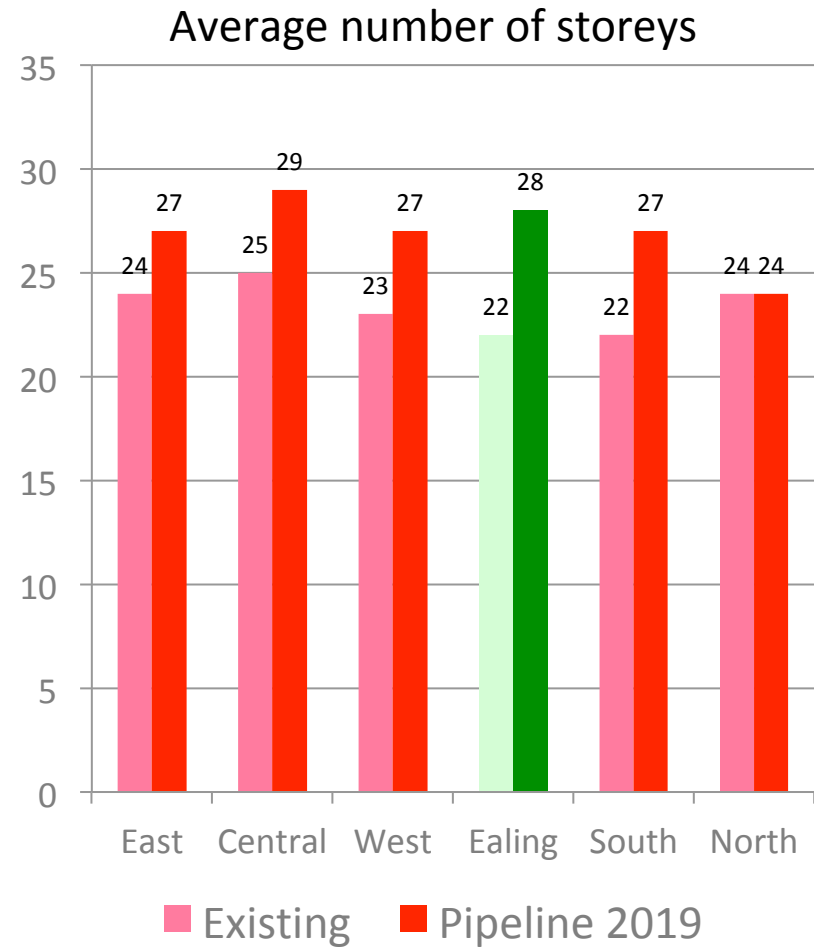
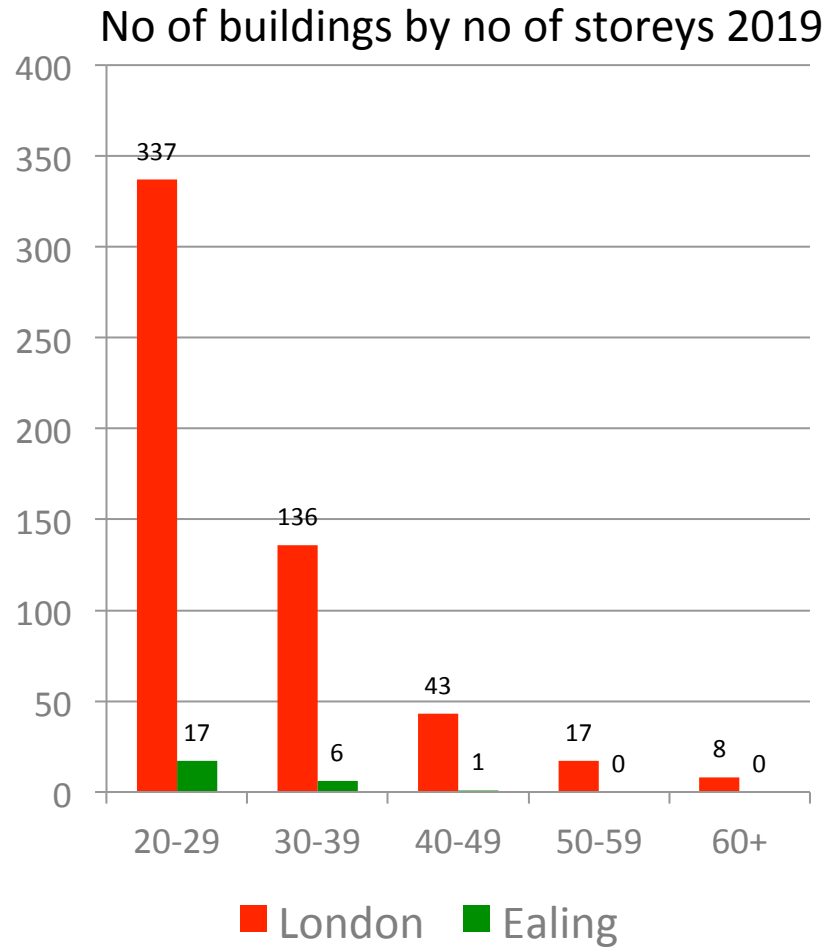


Among the three Northern boroughs:

- Only Enfield had any existing tall buildings and none planned to come on stream.
- By contrast both Barnet and, to a lesser extent, Haringey, neither with any existing stock of tall buildings, had large numbers of tall buildings in their 2018 planning pipeline.

Tall buildings evolution

Building heights



Source: New London Architecture

Tall buildings evolution

Building heights

With regard to building heights:

- The chart on the left of the previous page shows the distribution of tall buildings in the 2018 pipeline by the number of storeys in total for London. Almost two-thirds (62%), the highest share, comprised 20-29 storeys, followed by a quarter (24%) with 30-39 storeys, 8% with 40-49 storeys and 6% with more than 50 storeys. Tall buildings planned for Ealing follow a similar height distribution.
- The average height of existing and planned tall buildings shown in the chart on the right was in the 20-29 storey band across all sub-regions as well as the London Borough of Ealing.
- NLA argues that the figures show that there is an 'optimum height preference' for developers, and that building over this height is an exception and not the norm. Reasons given are the links between economies of scale and project viability as construction and engineering costs can increase over certain heights where structural reinforcements and core requirements take up additional floor space. NLA says further that 'the location of existing tall buildings and the ability to actually be able to build tall in an area (dependant on planning policy, viability and ground conditions) also has a significant influence on height and where tall buildings tend to cluster.'
- That said, tall buildings are growing taller across all sub-regions as in the London Borough of Ealing. While the average height ranged between 22 and 25 storeys in existing stock, it was between 24 and 29 storeys in the pipeline.