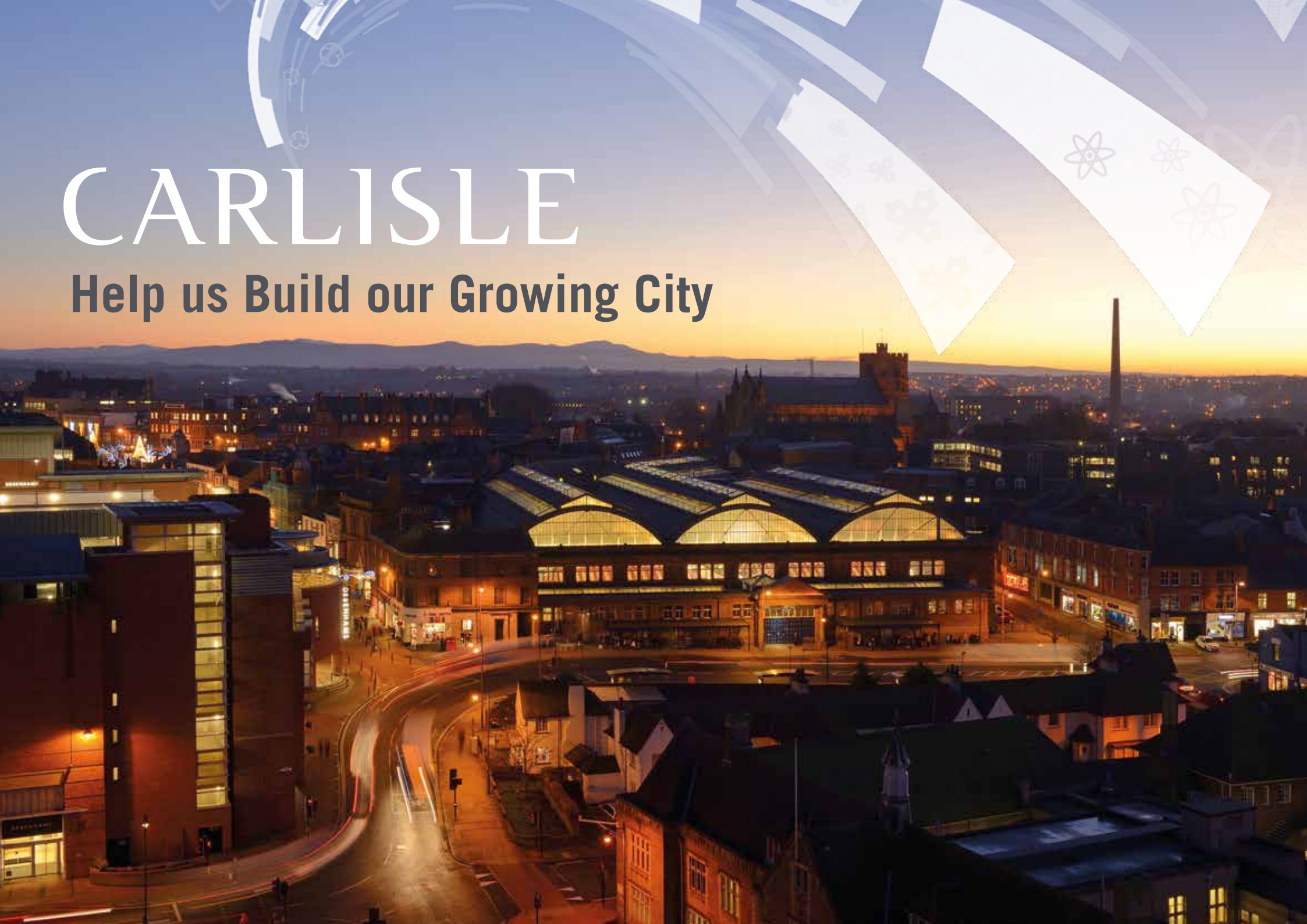


# CARLISLE

**Help us Build our Growing City**







# Introduction

The recently adopted Carlisle District Local Plan (2015-30) sets an ambitious house building target, aiming to deliver over 9,500 new homes by 2030, equating to an annual average of 565. To facilitate this growth Carlisle City Council has allocated sites across the District, complementing an attractive pipeline of already consented developments.

The land supply includes a large number of greenfield 'ready-to-go' viable sites across urban and rural locations, with a range of site sizes aiding diversity. The Local Plan target represents the highest growth level in Cumbria and constitutes a 20% uplift in the current housing stock.

Carlisle is also home to a Government backed Garden Village. St Cuthbert's is the largest of the 14 Garden Villages in the country and is an exciting and ground breaking project aiming to deliver up to 10,000 new homes, alongside new employment opportunities. This substantial level of growth will be supported by upgrades in infrastructure, and has cross-party and strategic partner support.

Carlisle City Council has worked alongside Lichfields to develop this prospectus, which we believe highlights that there has never been a better time for developers to gain a foothold in Carlisle. We are keen to work with housebuilders and developers to bring sites forward to deliver Carlisle's ambitious development targets. This document represents the start of a dynamic conversation.







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# Carlisle in Context

Carlisle, the City of the Lakes, is the regional capital of Cumbria, and the economic capital of an area expanding into south west Scotland, encompassing 500,000 people. Located in the north west of England, Carlisle is only 10 miles from the Scottish border - the nearest city neighbours are Newcastle (58 miles to the east); Lancaster (68 miles to the South); and Glasgow (96 miles to the north).

Carlisle is a vibrant historic city; the urban focus of Cumbria's population; a key economic driver; a sub-regional retail, leisure and cultural destination; and is home to the University of Cumbria.

Many of Carlisle's strengths are closely linked to its location, its physical infrastructure and the quality of its urban and rural environments. The city enjoys excellent north-south road connectivity via the M6 and is similarly advantaged by west to east road and rail links. With a principal train station on the West Coast Main Line, London is under three and a half hours by direct services to the south with Glasgow and Edinburgh an hour to the north. Carlisle Lake District Airport continues to grow and is being actively developed as a regional gateway for passengers.

Planned infrastructure investments will further enhance Carlisle's connectivity, increasing the city's sphere of influence.

## Existing Housing Stock



50,000+

(Source: ONS Census 2011)

## Population



108,200

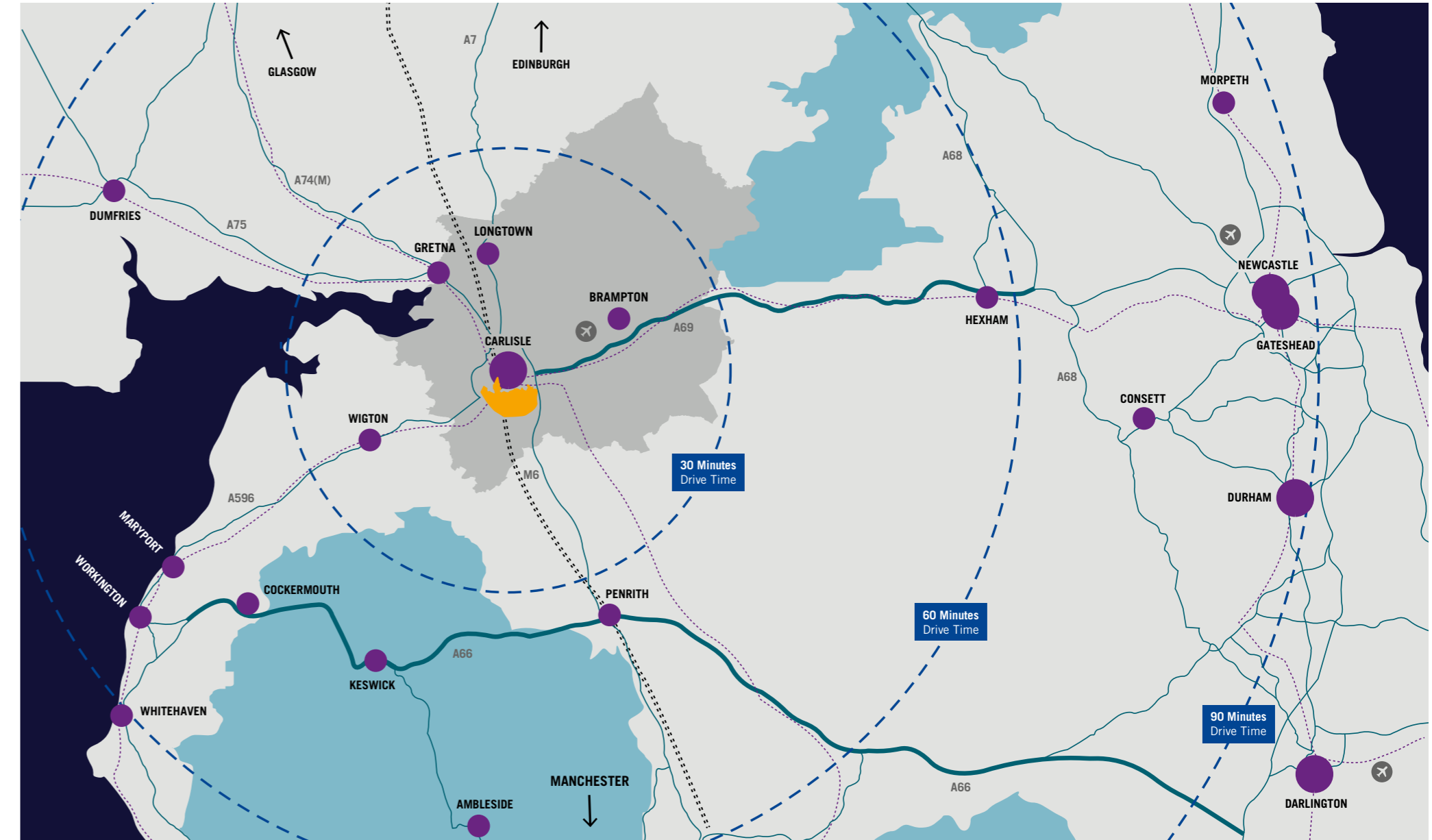
(Source: ONS 2015)

## Catchment



500,000+

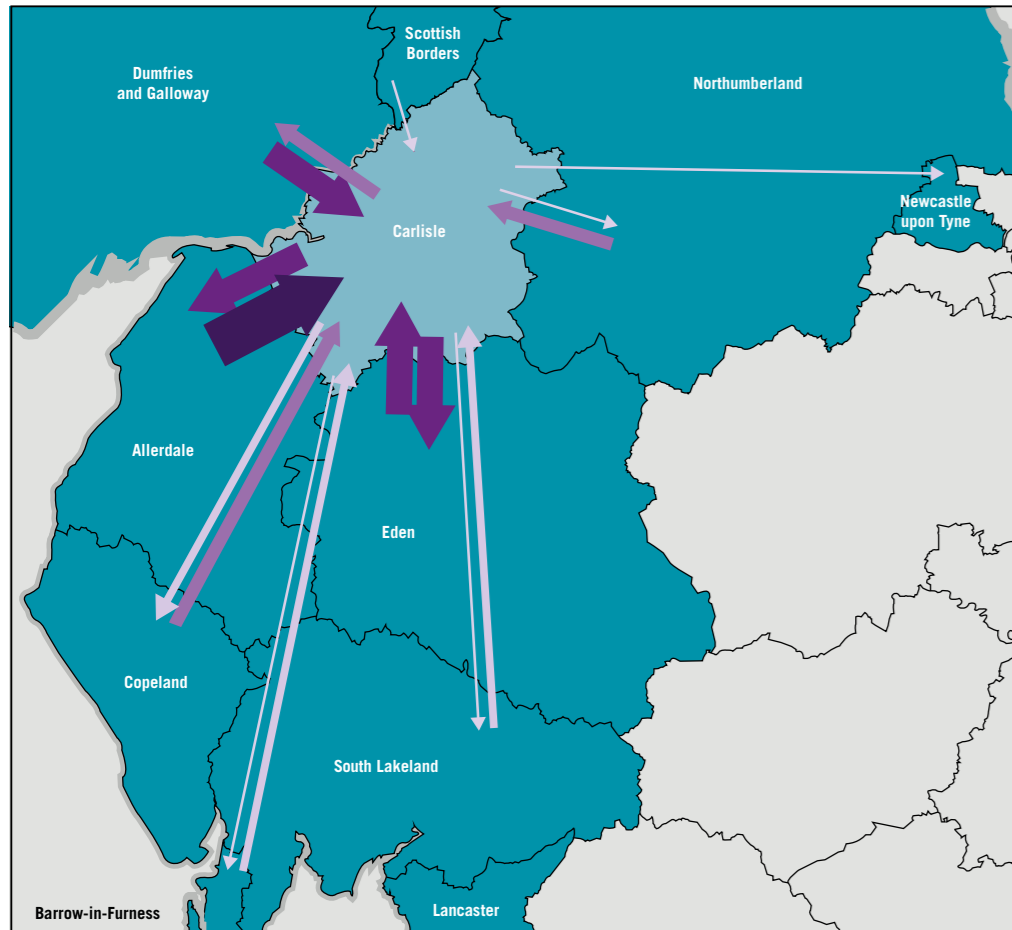
(Source: Carlisle City Centre Development Framework 2015)



KEY					
Airport		Major Road		St Cuthbert's Garden Village	
Settlement		Rail Line		Planned Highway Upgrades and Improvements	
		National Park		Carlisle District Boundary	
				West Coast Mainline	



# Commuting Patterns

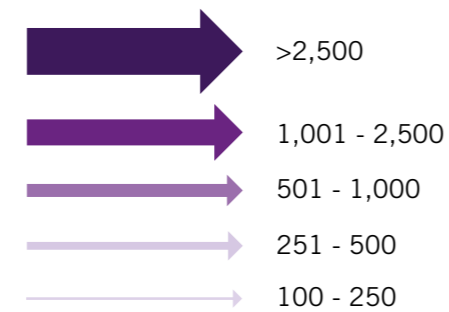


Carlisle Local Authority  
 Local Authority with a commuting in or out flow of 100 or more people to Carlisle

Live and work in Carlisle: **38,368**  
 Mainly work at or from home: **5,605**  
 No fixed place: **3,112**  
 Offshore installation: **84**  
 Outside UK: **65**

- The city has strong connections to its hinterland.
- 87% of Carlisle's working residents live and work in the District.
- 12,350 workers commute into Carlisle.
- The District is a well contained area where people want to live and work.

Travel to work commuting flow (no. of people), 2011



Source: ONS Crown Copyright Reserved ©





# A Diverse Economy and Well Skilled Workforce

Carlisle has a prosperous economy which is already home to many international and successful brands. The city's advantageous location and skilled workforce have helped to power thriving engineering, manufacturing and logistics industries with the presence of Nestlé, Pirelli, McVities and the legendary Eddie Stobart brand being testament to this. Beneath these headline companies sit a diverse and growing range of innovative SMEs.

Looking to the future, growth in the: manufacturing; logistics and storage; agriculture and related services; and construction sectors will drive employment growth and increased prosperity. This reflects a relative strength in these sectors in comparison to the national and northern position.

Carlisle's construction sector out-performs the sector nationally with both a lower proportion of workers with no qualifications at 10% against 13% nationally and a higher proportion of those with levels 3 and 4 qualifications at 38% against 35% nationally.

Continued employment growth in Carlisle will be aided by Kingmoor Park Enterprise Zone and a healthy supply of forward employment land. Underpinning all of this is Carlisle City Council's ambitious housing growth target and the desire to increase the District's working age population.

Carlisle is also at the heart of the sub-region's skills agenda being home to the University of Cumbria. Carlisle College, which has seen more than £30million investment in its city centre campus over recent years, also plays a key role with world class facilities on offer. Both of these institutions boast excellent relationships with employers across the county.





# Bold Growth

Over the last decade, Cumbria has been the fourth fastest growth area in the UK. Looking forward, it has an investment pipeline of £25billion over the next decade, a level largely unrivalled elsewhere in the UK. In the north west alone, five of the eight largest proposed investment projects will be delivered in Cumbria.

Cumbria's Local Enterprise Partnership (LEP) has set out a bold vision to create 31,500 additional jobs and an increase in GVA of £1.3billion across the next decade. Carlisle is central to the LEP's ambitions and therefore the wider economic wellbeing of the sub-region. Owing to its location and status, the city is ideally placed from a supply chain and labour pool perspective to support and benefit from the significant investments in West Cumbria which are at the heart of the UK energy economy.

The LEP also recognise housing as a key economic driver both in terms of the jobs it supports (construction contributes £674million in GVA and 13,500 jobs to the Cumbrian economy) and to the economy as a whole. Carlisle is spearheading efforts to increase housing delivery within the county. The target pursued through the Local Plan is the most ambitious pursued to date, with increasing completions testament to this target being achievable.

Carlisle also has a significant pipeline of residential opportunities to support housing growth with the scale of these, aided by St Cuthbert's Garden Village, acting to secure continuity in the long term supply of housing land within the sub-region.

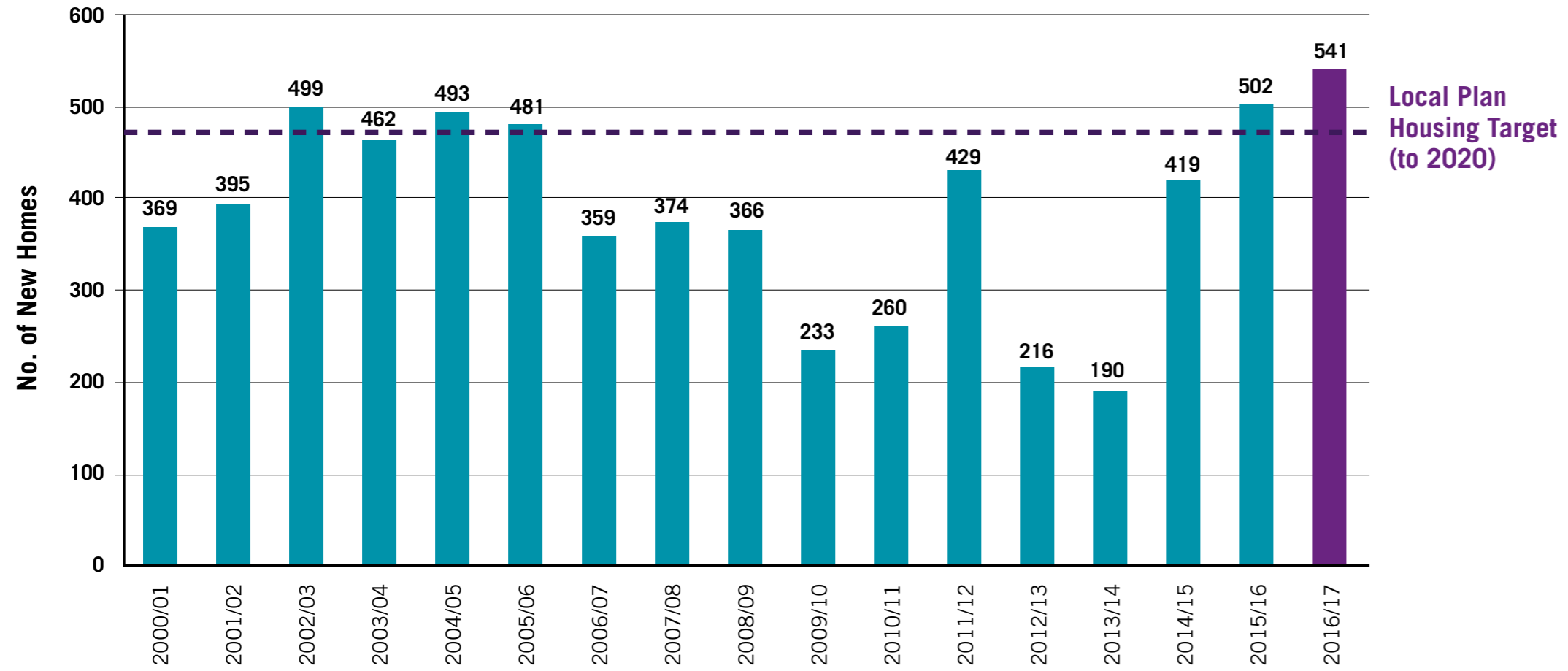
Carlisle is a city where the public and private sector share an ambitious view of the future. It is a place which is alive to its potential, more confident than ever and looking to its future. Carlisle offers enormous potential for those who want to be part of a growing city.





# New Housing in Carlisle

Historic Net Housing Completions



- Record net completions recorded in the past two consecutive years.
- Five market-led sites recorded annual build rates of between 45 - 50 units in 2016/17.





# St Cuthbert's Garden Village

St Cuthbert's is a planned new mixed use development comprising up to: 10,000 new homes; a strategic employment offer; ancillary infrastructure; and a new southern link road of larger than local significance. It was announced as a Garden Village in January 2017.

Of the 14 sites included in the Government's programme, St Cuthbert's is by far the largest in terms of its potential capacity. It is also one of only two Garden Villages north of Manchester and easily amongst the most ambitious development projects being actively progressed within the north of England.

St Cuthbert's has its grounding in the Carlisle District Local Plan 2015 - 2030 being identified as a broad location (known as Carlisle South) for future growth both within, and beyond, the current plan period.

The opportunities afforded by the carefully chosen location provide multiple ideal starting points for a series of new, sustainable garden settlements that are well connected to local services and facilities, as well as the offer of the existing city of Carlisle. The location has unique potential to deliver transformational long term housing growth with associated investment in infrastructure in direct response to the housing and development needs of Carlisle District and the wider sub-region.

Good progress has been made on advancing the project. A major focus of the past six months has been getting robust foundations in place and defining a clear strategy to drive momentum. The scale is such that there are genuine opportunities for new private sector partners to work alongside the public sector to deliver a forward looking and exemplary new community for both current and future generations.





# Positive Planning and Opportunities

Carlisle is very much open for business and development friendly. There is strong local leadership, a can do attitude and a great coming together of the private and public sector with a genuine shared ambition to make Carlisle the best it can possibly be.

Despite record and increasing housing completions, c.2,000 homes remain on allocated sites which are not yet attached to a developer, as well as several hundred on consented sites. There are genuine opportunities for new delivery partners with a number of new developers already enjoying success having established a presence in the District.

Carlisle is one of a reducing number of local planning authorities who still offer free and comprehensive pre-application advice to smooth the formal planning process. Carlisle City Council has a track record of taking a realistic approach to viability including a pragmatic and flexible approach to affordable housing.

Our Economic Liaison Panel offers access to our Executive and Senior Management Team. This has proved a successful forum for new developers to announce their presence and to introduce their products and approach, raising awareness and an appreciation at the highest level.



93%

The % of officer recommendations approved by Councillors

(Source: Carlisle City Council)



90%

The % of planning applications determined under delegated powers

(Source: Carlisle City Council)



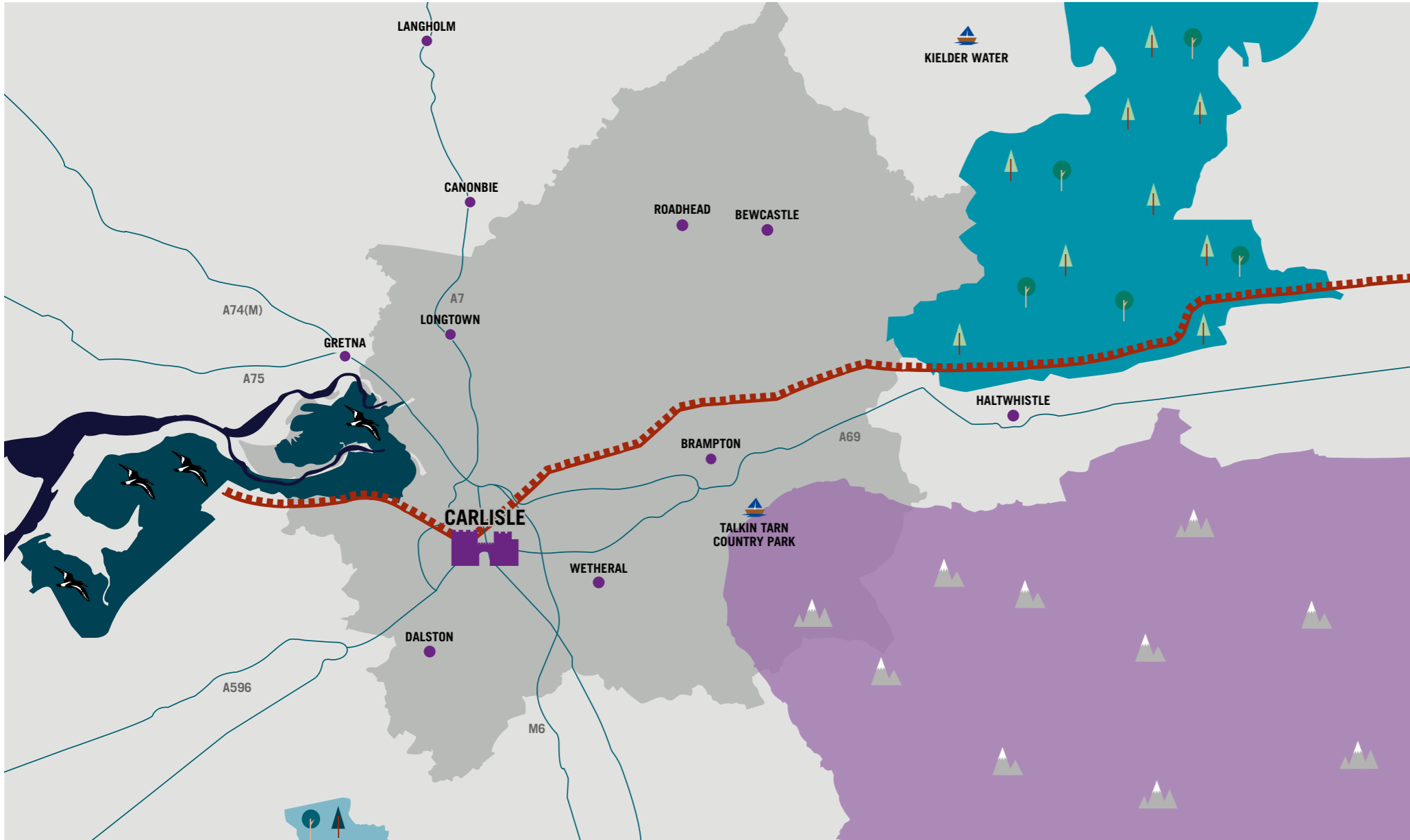
70%

The % of Major decisions determined on time

(Source: Carlisle City Council)

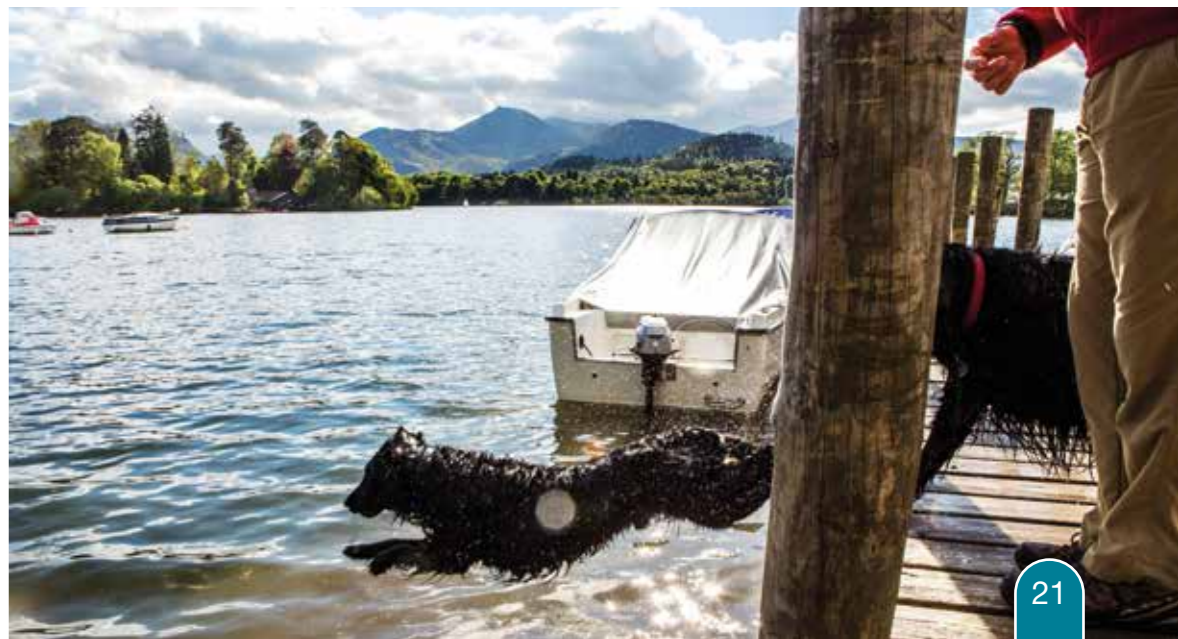






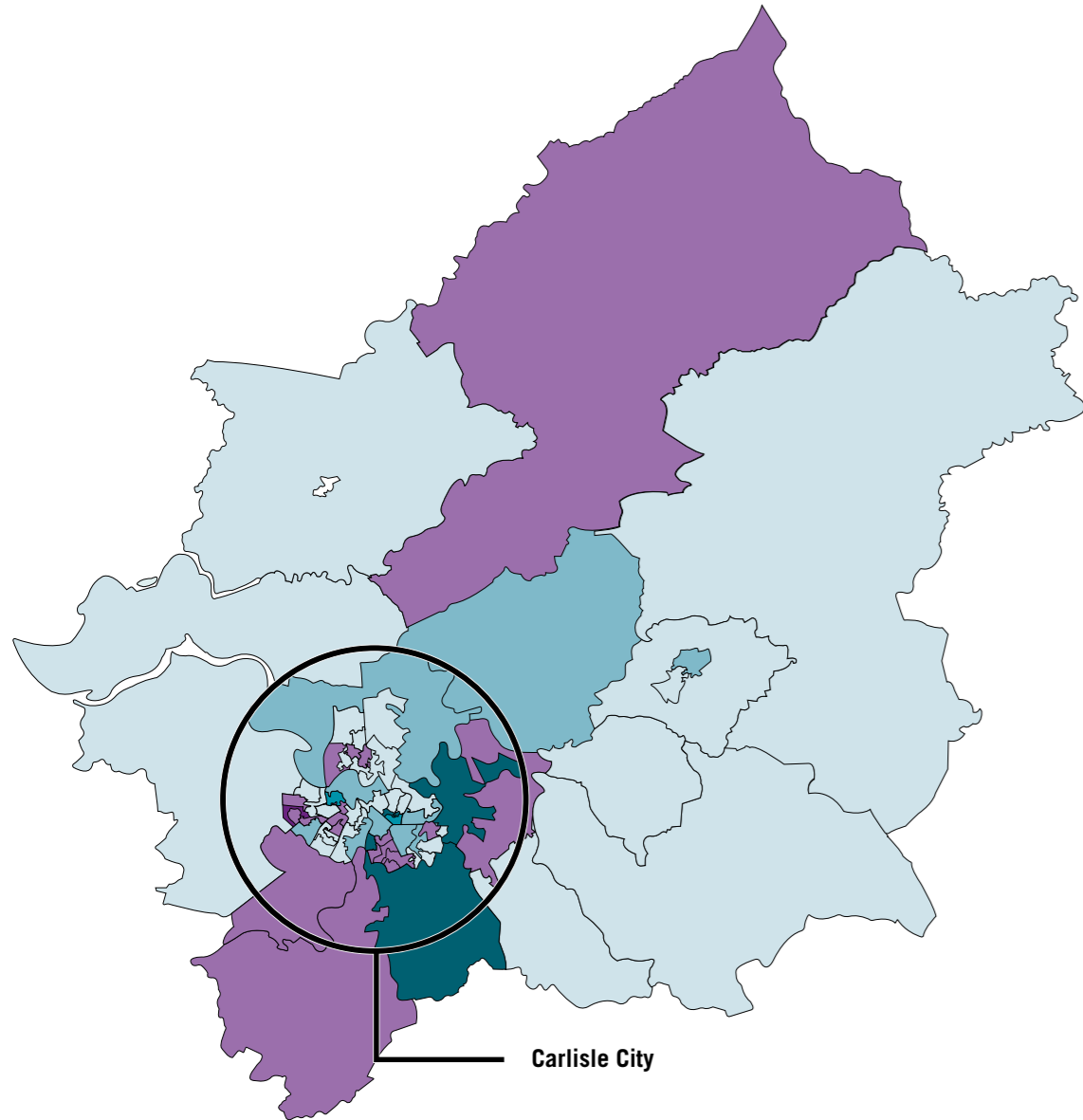
# Nature and Heritage on the Doorstep

<b>KEY</b>					
Carlisle District		Northumberland National Park		North Pennines AONB	
Hadrian's Wall World Heritage Site & National Trail		Lake District National Park & World Heritage Site		Solway Coast AONB	
				Settlement	



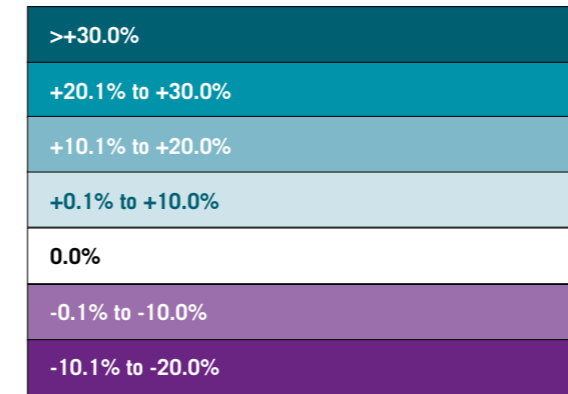


# A Growing Population



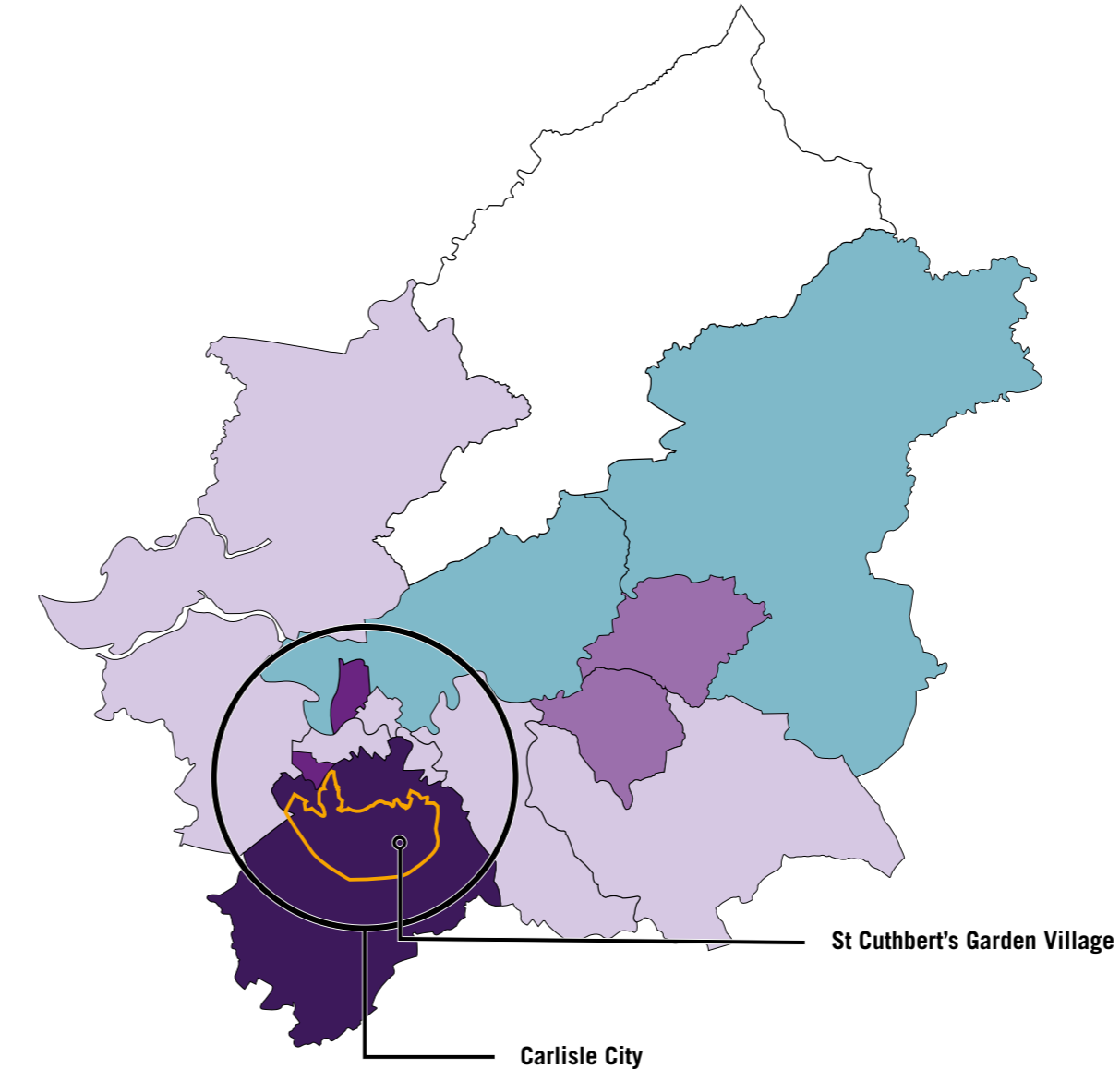
- Projected growth in Carlisle 2015 - 2031 is almost 3% higher than the Cumbria average.
- Most significant growth to the south of the city.
- Key drivers for growth are internal migration and rising birth rates.

Population Growth, 2001 - 2011, by LSOA



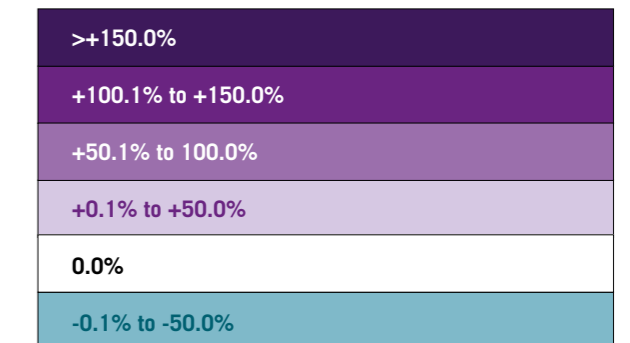
Source: ONS Crown Copyright

# An Unmet Need



- The correlation between increased house prices and concealed households demonstrates pressures in the market.
- This creates a captive market for housebuilders and developers.
- Concealed households are families or adults living with "host" households, for example with parents or friends.

% Change in Concealed Families, 2001 - 2011 (shown by ward).



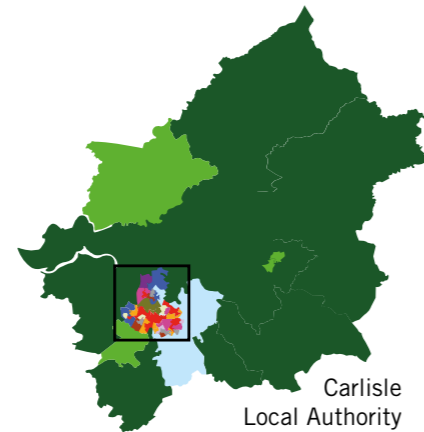
Source: ONS Crown Copyright



# Market Conditions



- Mosaic mapping identifies the dominant group in an area based on a range of demographic analysis.
- Carlisle has the youngest first time buyers in the UK at 27. (Halifax, 2016)
- Culture of buying feeds housing demand.
- Mosaic consists of 15 socio-economic groupings informed by 450 different data points.

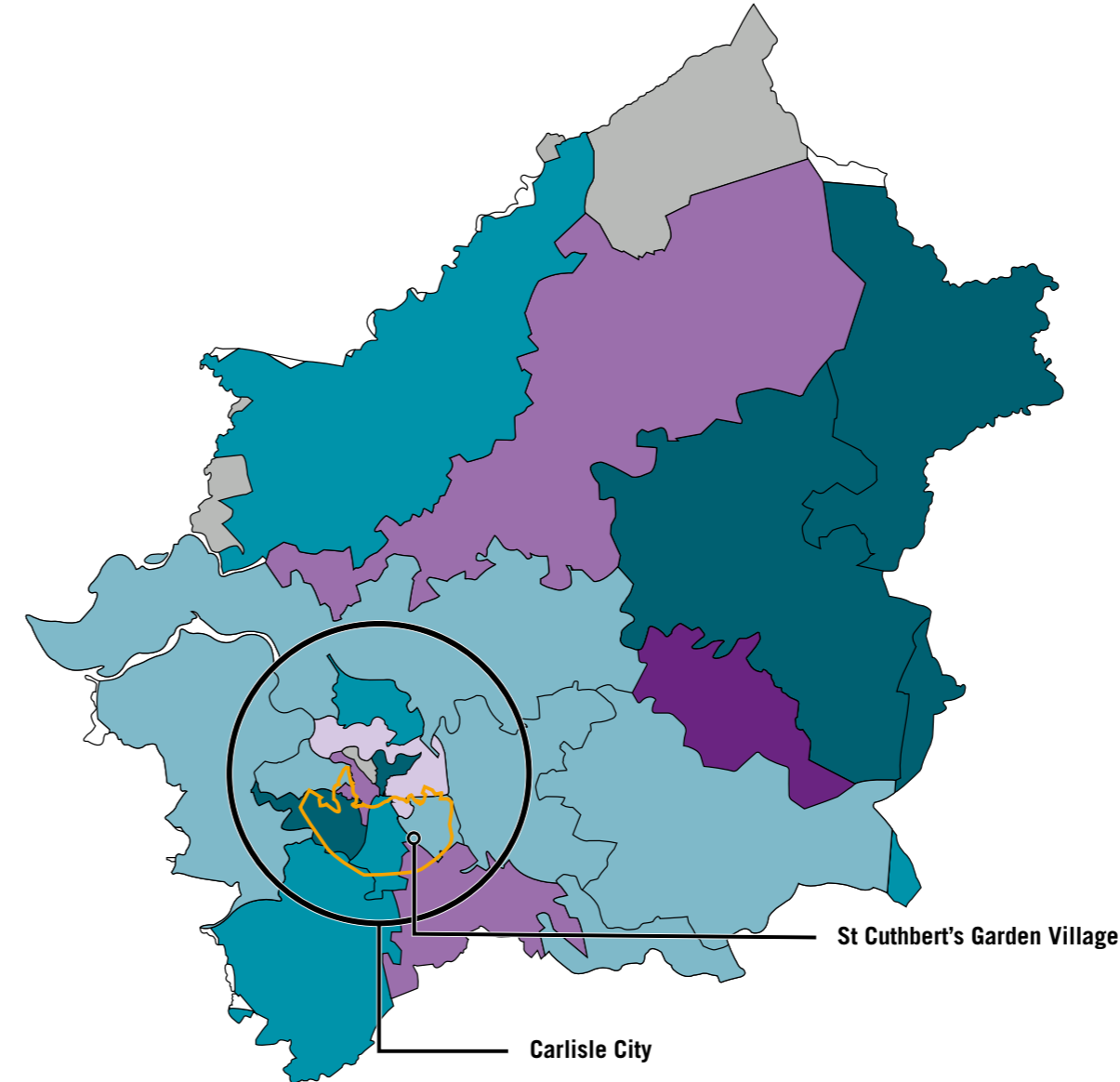


**MOSAIC, 2015**  
(most dominant group by LSOA):

A	City Prosperity
B	Prestige Positions
C	Country Living
D	Rural Reality
E	Senior Security
F	Suburban Stability
G	Domestic Success
H	Aspiring Homemakers
I	Family Basics
J	Transient Renters
K	Municipal Challenge
L	Vintage Value
M	Modest Traditions
N	Urban Cohesion
O	Rental Hubs

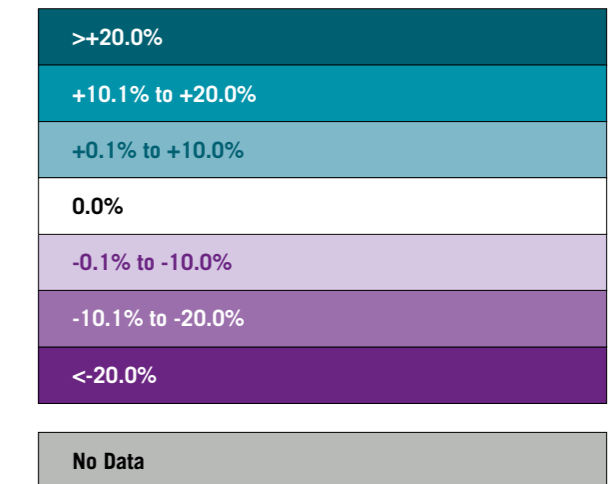
Source: Experian, 2017 ©

# Rising House Prices



- Positive trends in many areas, particularly where the Local Plan allocates homes within and on the periphery of the city.
- Some of the negative price changes are due to an increase in terrace house sales which are lower in value.

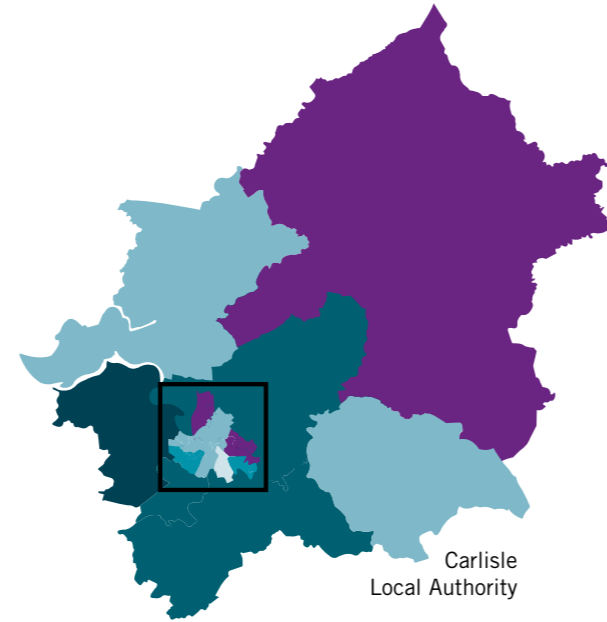
Average House Price Change by Postal Sector, 2012 - 2014



Source: Land Registry. Crown Copyright Reserved



# A Broad Range of Sales Values



Average New Build House Price, 2014 - 2016 (by Ward)

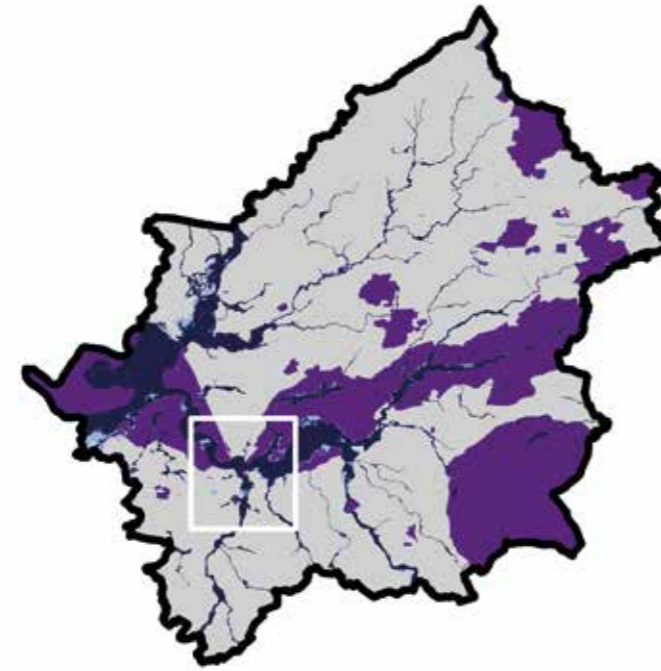
>£250k
£200k - £250k
£150k - £200k
£100k - £150k
<£100k
No New Build Sales Data

Source: Price Paid Data, Land Registry  
© Crown Copyright 2016





# Planning Constraints



- 66% of land area is free from NPPF Footnote 9 constraints.
- All allocated sites are within Flood Zone 1.
- No Greenbelt.

Flood Zone 2
Flood Zone 3
Footnote 9 Constraint *

\* Area of Outstanding Natural Beauty SSSI  
 Special Protection Area (& 400m buffer)  
 RAMSAR  
 World Heritage Sites  
 Special Areas of Conservation  
 Scheduled Ancient Monuments  
 Registered Parks and Gardens  
 National Parks  
 Local Nature Reserves  
 National Nature Reserves

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# How to Find Out More

Carlisle is up for growth and open for business. We are a forward thinking and proactive city. A city that knows where it wants to be and has plans in place to get it there. The private sector is valued and there is a commitment to partnership working. Strong local leadership prevails and there is a genuine appetite for innovation, flexibility and a can-do attitude.

If you are excited by our development ambitions and would like to find out more about the opportunities available in Carlisle then contact us for an informal, no obligation, chat about the possibilities Carlisle could hold for you and your business or investment interest.

**Please contact us at:**

**Email:** [lpc@carlisle.gov.uk](mailto:lpc@carlisle.gov.uk)

**Telephone:** 01228 817160

**Visit:** [www.carlisle.gov.uk/planning-policy](http://www.carlisle.gov.uk/planning-policy)





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