

CARLISLE

Help us Build our Growing City
2020 Update





Introduction

The Carlisle District Local Plan sets an ambitious house building target, aiming to deliver more than 9,500 new homes by 2030, equating to an annual average of 565 and representing a 20% uplift in the current housing stock. The strategy at the heart of the plan remains firmly on track, testament to which have been record levels of new house building within Carlisle in four out of the last five years, including 663 new homes across 2019/20.

Carlisle's strong growth agenda is driven by a need to grow the available local labour supply. Cumbria Local Enterprise Partnership has identified the projected shortfall in working age population as the greatest challenge facing the area and are explicit that, in response, Cumbria needs to build houses at a much greater rate. Carlisle is the largest settlement in Cumbria, the only city in the county and the wider Borderlands area. It is well-connected by road and rail. To achieve substantial population and housing growth, there is a consensus that Carlisle is required to play a catalytic role.

The city has already embraced this housing challenge, ensuring there is a robust platform from which to kick on. An attractive pipeline of already consented developments complement a number of remaining housing allocations, with the nationally significant St Cuthbert's Garden Communities proposal to the south of the city providing a forward supply of in excess of 10,000 new homes.

Carlisle City Council has once again worked with Lichfields to develop this updated prospectus. We believe it acts to reaffirm that there has never been a better time for developers to gain a foothold in Carlisle and join an increasing number who are now experiencing the rewards of investing in Carlisle. We remain committed to working 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, which has potential to expand, enhancing Carlisle's role as a University City.

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 (and with measures afoot to ensure HS2 compatibility), 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 is now (post July 2019) operating as a regional gateway for passengers, opening up the city to new markets.

The economic growth of Carlisle is being supported by the unique, cross boundary and transformative Borderlands Inclusive Growth Deal, with the Heads of Terms now signed on a £394.5m investment deal. With Carlisle described as the 'beating heart' of the Borderlands, a significant proportion of the funding is earmarked for planned infrastructure investments to further improve Carlisle's connectivity, increasing the city's status and sphere of influence.

Existing Housing Stock



53,000

Source: MHCLG, 2018

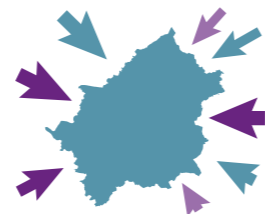
Population



108,400

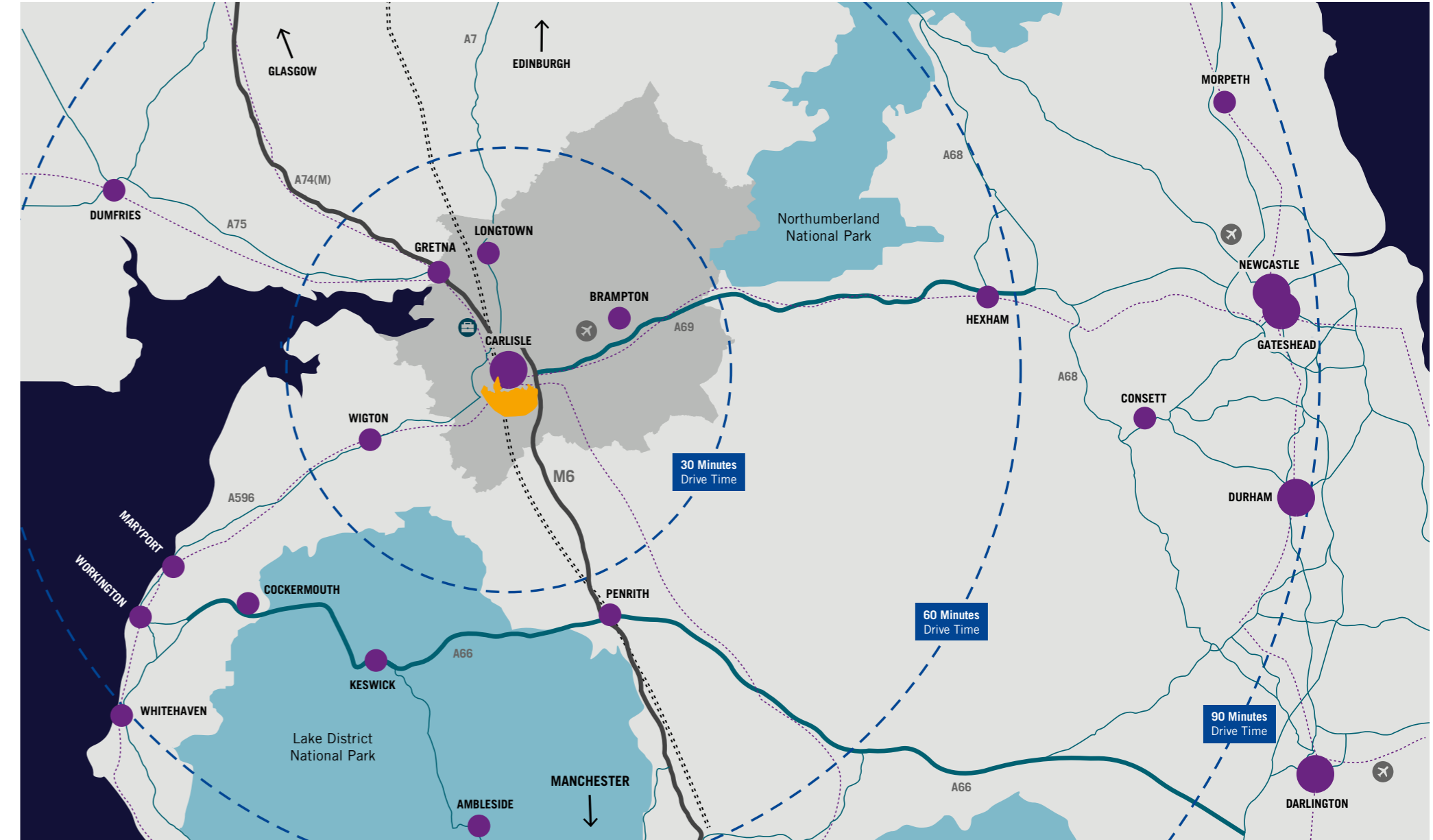
Source: ONS, 2018

Catchment



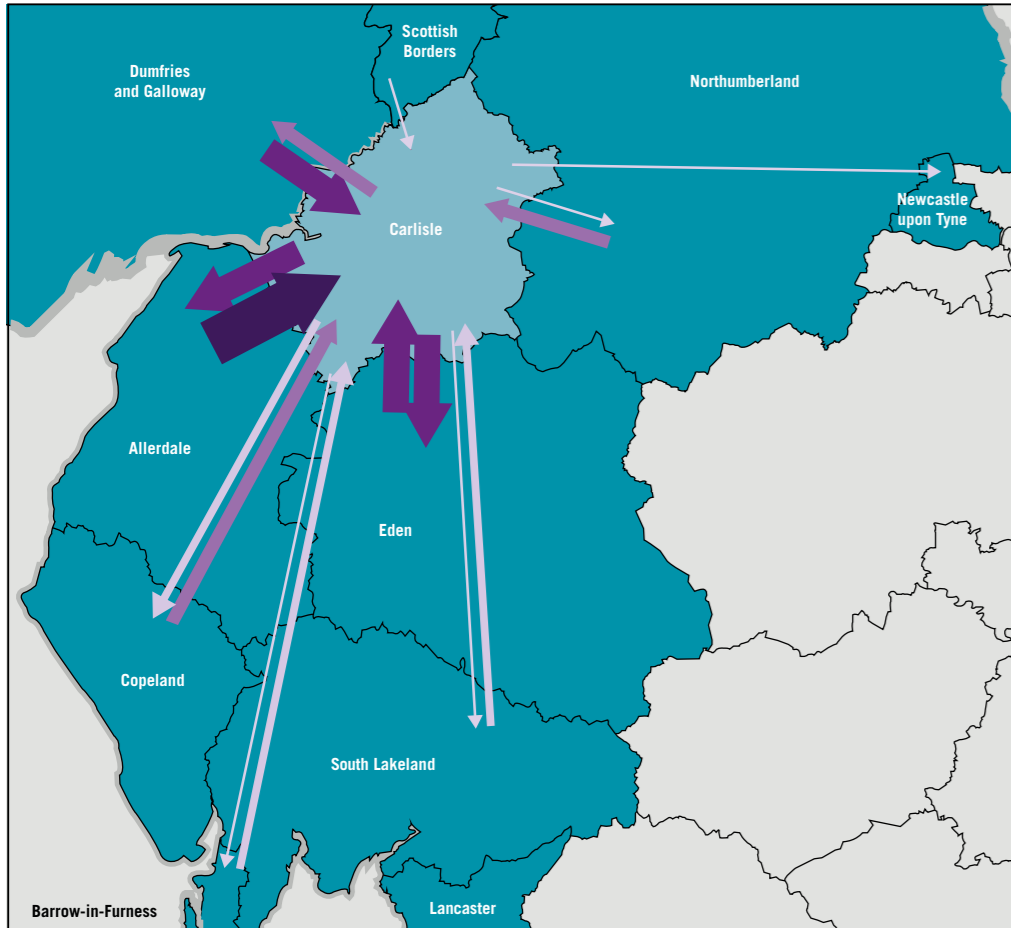
500,000+

Source: Carlisle City Centre Development Framework 2015



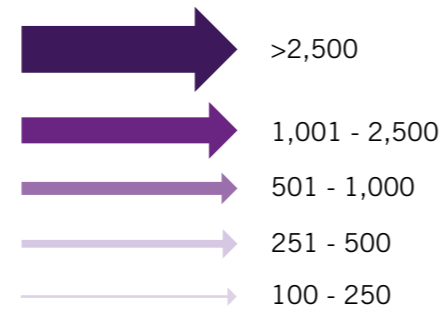
KEY			
Carlisle Lake District Airport		Major Road	
Settlement		Rail Line	
Kingmoor Park Enterprise Zone		National Park	
		St Cuthbert's Garden Communities	
		Planned Highway Upgrades and Improvements	
		Carlisle District Boundary	
		West Coast Mainline	

Commuting Patterns





- 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 ©

 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**



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, McVitie's 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. In addition, Carlisle's emerging economic strategy also has a strong focus on growing the digital and creative sector which should, with the right interventions, thrive in the city.

Continued employment growth in Carlisle will be aided by Kingmoor Park Enterprise Zone (the only Enterprise Zone in Cumbria) 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. Carlisle City Council has worked with our largest Housing Association, Riverside, and their developer partners to establish a "Demonstration Project", whereby construction students from Carlisle College can gain practical onsite skills and experience as part of their training.

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. Notwithstanding this, Cumbria Local Enterprise Partnership's Skills Investment Plan highlights construction skills as a priority sector. The establishment of an employer-led Construction Sector Skills Panel demonstrates the proactive approach being pursued in Cumbria in terms of staying abreast of challenges and in instigating solutions to projected skills issues.



Bold Growth

Cumbria Local Enterprise Partnership (CLEP) published the Local Industrial Strategy (LIS) in 2019. The LIS highlights that Cumbria's economy generates £12 billion annually; with the county being home to 500,000 people and generating 47 million visits each year. The Strategy identifies that Cumbria has a "polycentric" industrial structure - demonstrating particular strengths in agricultural industries and tourism on one hand and a highly concentrated, globally orientated, manufacturing sector on the other (22% of Cumbria's GVA and 16% of our employment comes from manufacturing, placing Cumbria third and first, respectively, in CLEP rankings).

CLEP also recognise housing as a key economic driver both in terms of the jobs it supports and to the economy as a whole. The LIS highlights that 21,000 people are employed in the construction sector across Cumbria. The industry contributes £800 million in GVA - 8% of the total. During 2020 CLEP has produced a new Housing Delivery Strategy, in consultation with the Cumbrian local authorities and other key stakeholders. The Strategy focusses on both enablers and barriers to development in producing the specific activities and interventions, including identifying infrastructure gaps, to meet our development ambitions.

Cumbria is one of the few areas in England where all our local housing targets significantly exceed the Government's standard methodology for estimating housing needs. The LIS recognises the need for an additional 2,000 new homes per annum across Cumbria (in a range of sustainable locations and meeting a range of housing needs) delivering the

requirement for workforce growth. Carlisle is the Cumbrian District with the highest target for new homes and highest recent delivery rates.

Carlisle is central to CLEP's ambitions and therefore the wider economic wellbeing of the sub-region. Owing to its location and status as the sub-regional capital, the city is ideally placed from a supply chain and labour pool perspective to support and benefit from economic investment and opportunities across Cumbria, the Borderlands and beyond.

Carlisle is also spearheading efforts to increase housing delivery within the county. The target pursued through the Local Plan is the most ambitious to date, with increasing annual completions testament to the achievability of this.

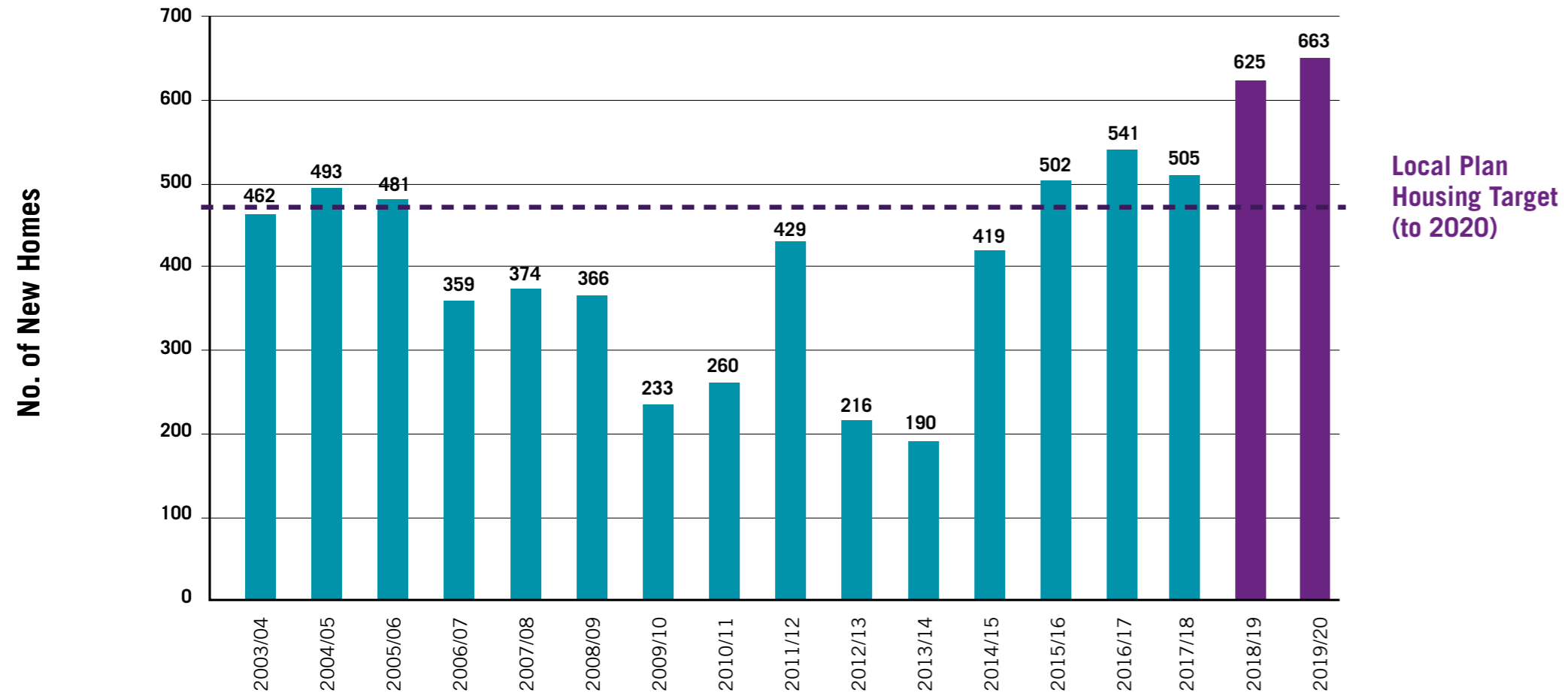
Carlisle also has a significant pipeline of residential opportunities to support housing growth with the scale of these, aided by St Cuthbert's Garden Communities, acting to secure continuity in the long-term supply of housing land within the sub-region.

Carlisle is a city where the public and private sector share an ambitious view of the future. This is a place which is alive to its potential, more confident than ever and looking to its future. The positive, forward thinking initiatives we have introduced put Carlisle in a strong position to bounce back quickly from any possible negative impacts of BREXIT and Covid-19. 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 in four of the past five years, with an annual average of 561 observed over this period.
- Five market-led sites recorded annual build rates of more than 45 units in 2018/19, including two delivering 56 within the 12-month period.
- Delivery rates boosted by increasing number of developers active in Carlisle, with many recent entrants going on to secure and implement additional sites.



St Cuthbert's Garden Communities

The vision for St Cuthbert's is to deliver an exciting, unique and transformational cluster of distinct new garden settlements in stunning healthy landscapes within a world class setting. The opportunities afforded by the carefully chosen location provide multiple starting points for a series of new and expanded settlements that are well connected to local services and facilities, as well as the offer of the existing city of Carlisle. Yielding 10,325 new homes once complete, St Cuthbert's has the potential to meet immediate housing needs and to provide continuity in supply that will drive growth across the longer term.

Of the 14 sites included in the Government's original Garden Village programme in January 2017, St Cuthbert's was one of only two Garden Communities north of Manchester and is easily amongst the most ambitious development projects being actively progressed within the north of England. The scale, growing status and the pace at which the project is being progressed has seen the Government elevate St Cuthbert's to Garden Town status. To date the Government have invested in excess of £1m to support advancing the proposal.

Significant progress on Masterplanning; firm and increasing developer interest in the opportunity presented by St Cuthbert's; and the award of £102m Housing Infrastructure Fund (HIF) grant, which is enabling the accelerated delivery of the Carlisle Southern Link Road (CSLR) and consequently housing development, have collectively acted to amplify the importance of accelerating the delivery strategy for the Garden Communities.

At the fore of the delivery strategy is the production of a dedicated St Cuthbert's Local Plan which will set out a strategic policy suite for the location, including establishing a framework for contributions to infrastructure and providing a tailored affordable housing policy, together with other development management policies. In addition, it will clearly identify the spatial frameworks for development within each of the proposed new villages.

Beyond the planning framework, Carlisle City Council working with strategic partners including Homes England, continue to explore the role required of the public sector to enable and accelerate delivery, including with regards to matters such as land assembly and long-term stewardship.

The scale of the opportunity is such that there are genuine opportunities for new private sector partners to work alongside the public sector to deliver forward looking and exemplary new communities 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. The recent award of: £102m Housing Infrastructure Funding for the new Carlisle Southern Link Road to the south of the City; in excess of £1m capacity funding to accelerate the planning of St Cuthbert’s Garden Communities; and confirmation of the £394.5m Borderlands Inclusive Growth Deal act to demonstrate the Government’s confidence in Carlisle as a place in which to invest.

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.



90%

The % of officer recommendations approved by Councillors

Source: Carlisle City Council



95%

The % of planning applications determined under delegated powers

Source: Carlisle City Council

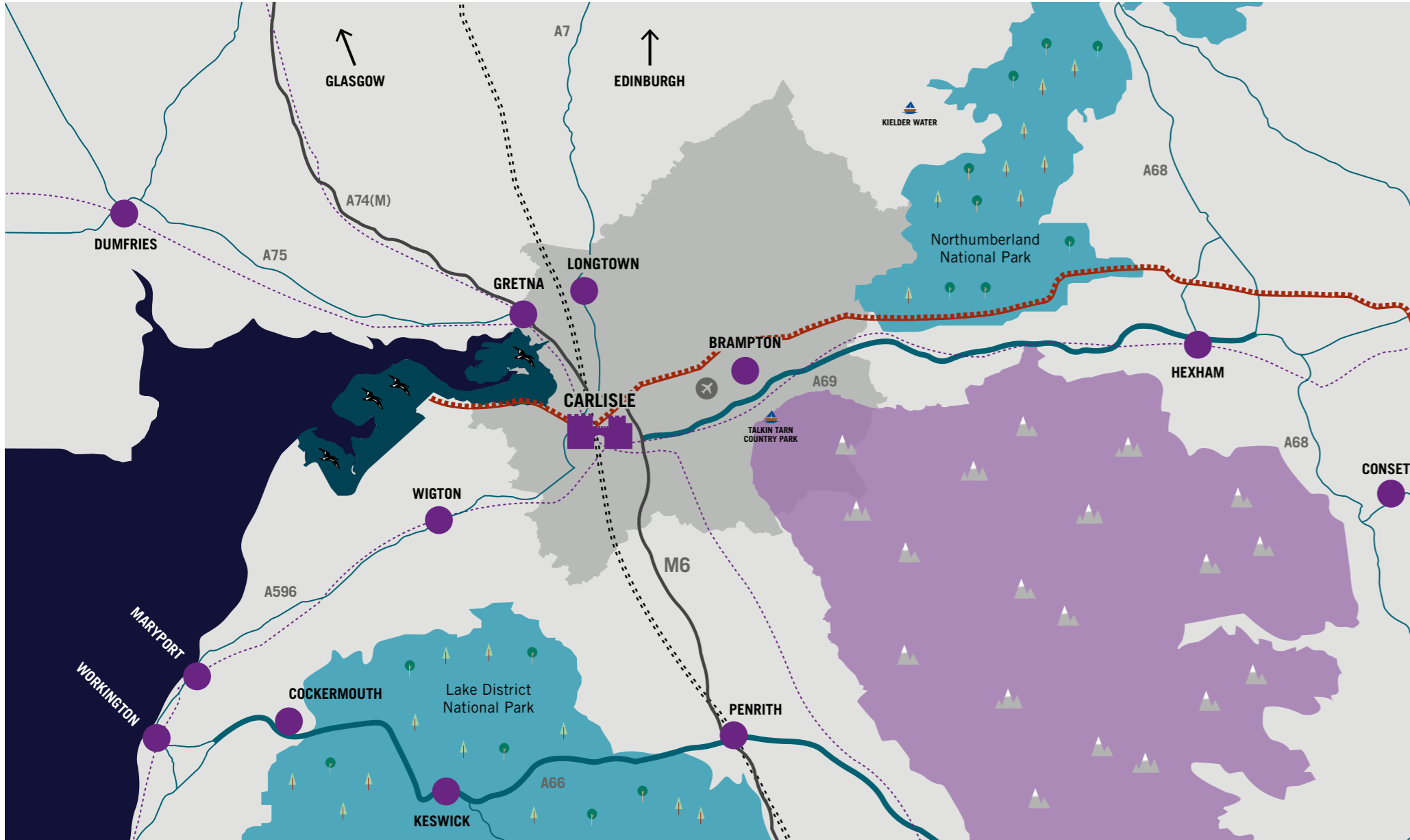


91%

The % of Major decisions determined on time

Source: Carlisle City Council





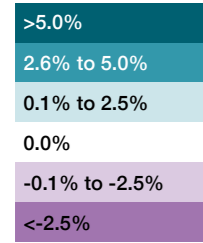
Nature and Heritage on the Doorstep

KEY	
Carlisle District	Grey shaded area
Hadrian's Wall World Heritage Site & National Trail	Red dashed line
Northumberland National Park	Teal shaded area
Lake District National Park & World Heritage Site	Light blue shaded area
North Pennines AONB	Purple shaded area
Settlement	Purple dot
Solway Coast AONB	Dark teal shaded area

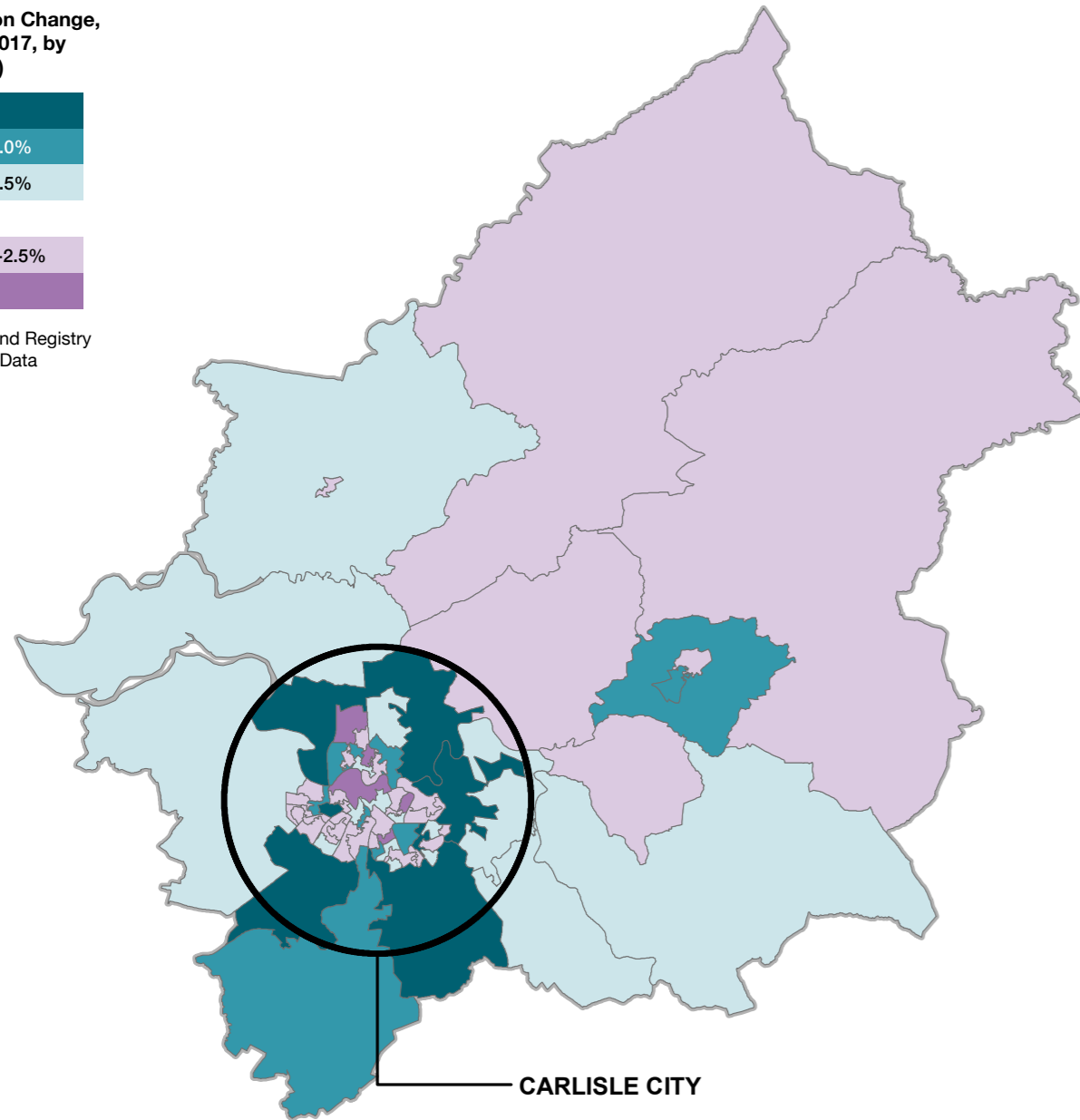


A Growing Population

Population Change, 2011 to 2017, by LSOA (%)

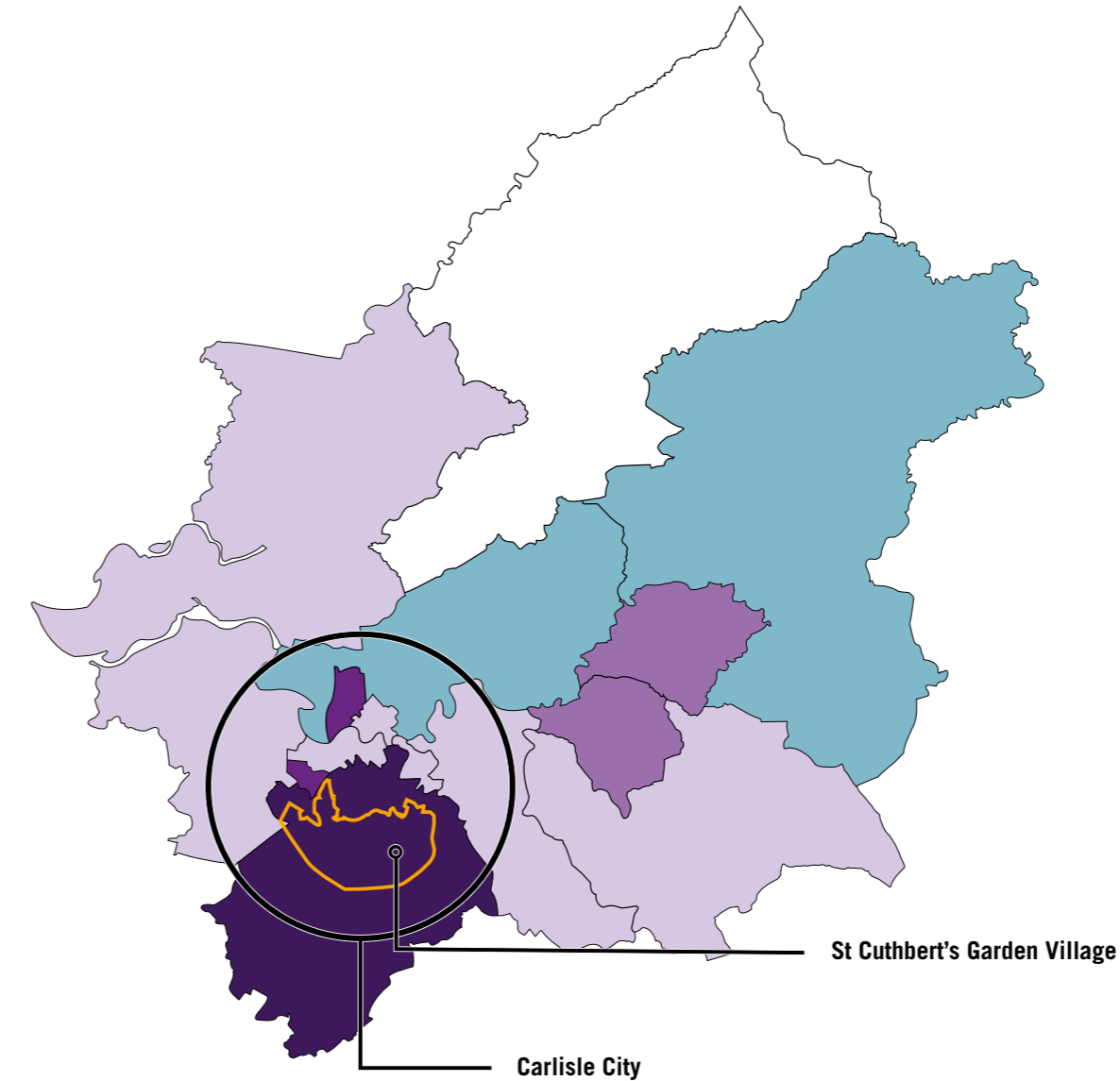


Source: Land Registry Price Paid Data



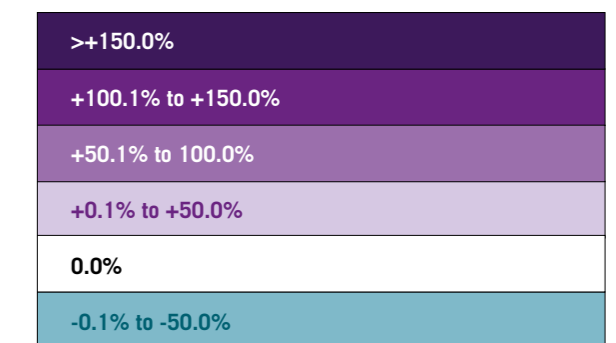
- Projected growth in Carlisle 2019 - 2031 is approximately 3% higher than the Cumbria average.
- Most significant growth to the South of the City.
- Key drivers for growth are internal migration, alongside evidence to support new homes being occupied through migration from elsewhere in the UK.

An Unmet Need



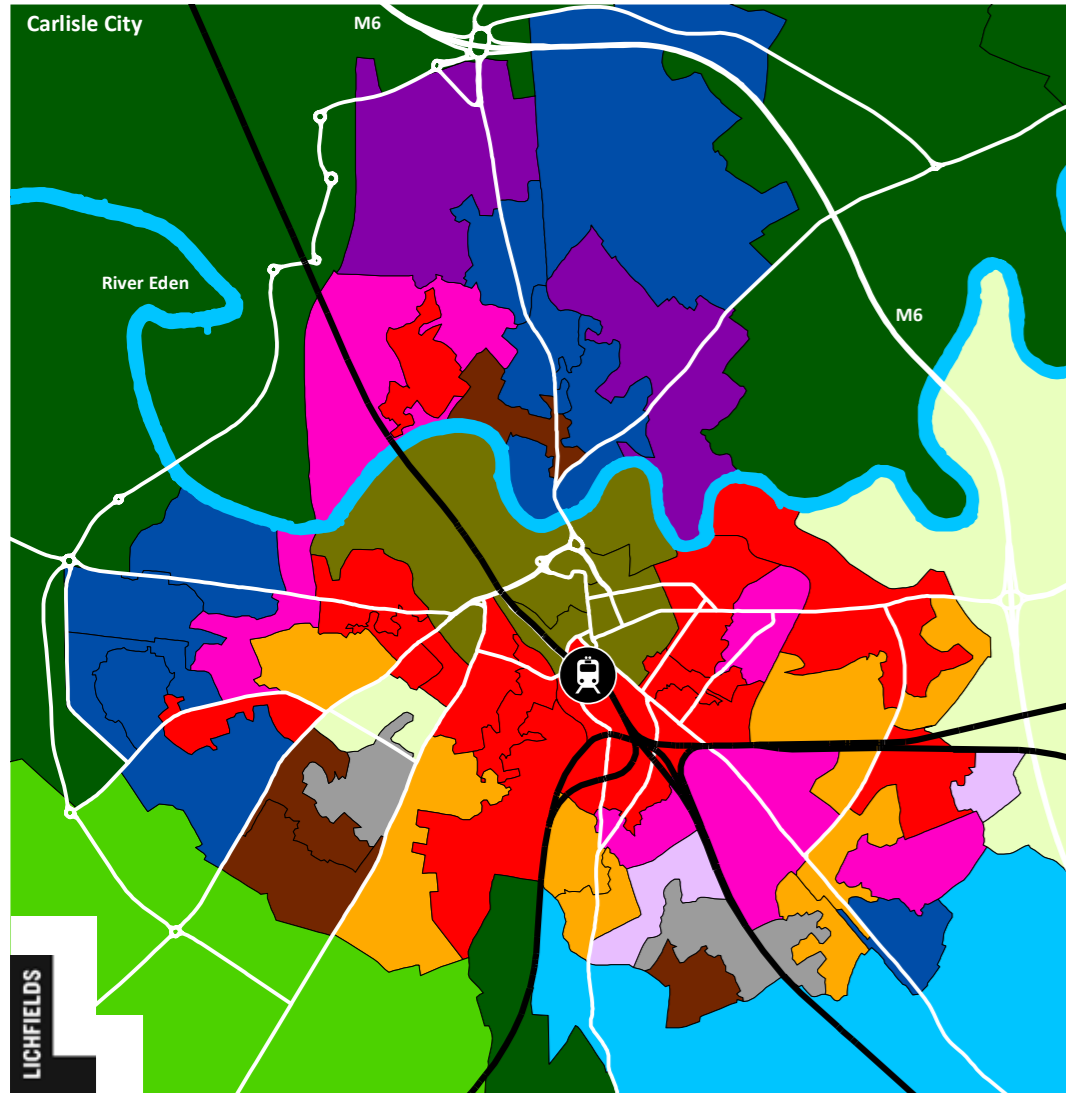
- The correlation between increased house prices and concealed households demonstrates pressures in the market.
- This creates a captive market for house builders and developers.
- Concealed households are families or adults living with “host” households, for example with parents or friends.
- A 2017 Housing Market Demand and Capacity Assessment concluded that, owing to recent economic growth trends, combined with robust strategies for future growth, there will be strong ongoing housing demand over the coming decades and period of delivery for St Cuthbert's Garden Communities.

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



Source: ONS Crown Copyright

Market Conditions

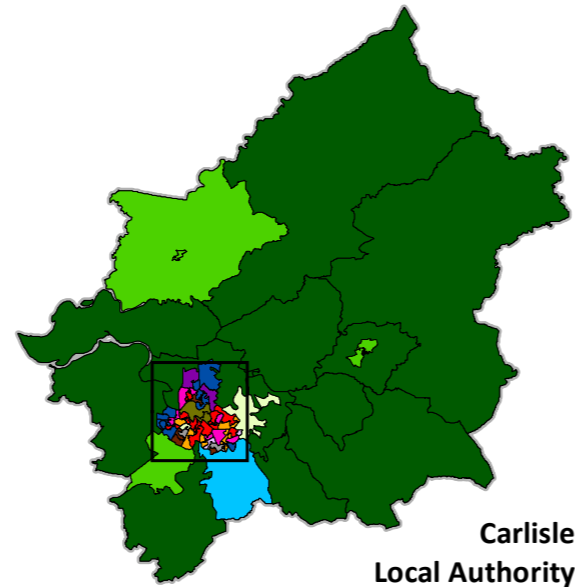


- Mosaic mapping (consisting of 15 socio-economic groupings informed by 450 different data points)
- Identifies the dominant group in an area based on a range of demographic analysis.
- Research conducted by the Halifax in 2016 identified Carlisle as having the youngest average age for first-time buyers in the UK, at 27.
- Culture of buying feeds housing demand.

MOSAIC, 2017
Most prevalent 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

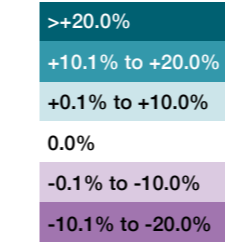
Source: Experian, 2018 ©



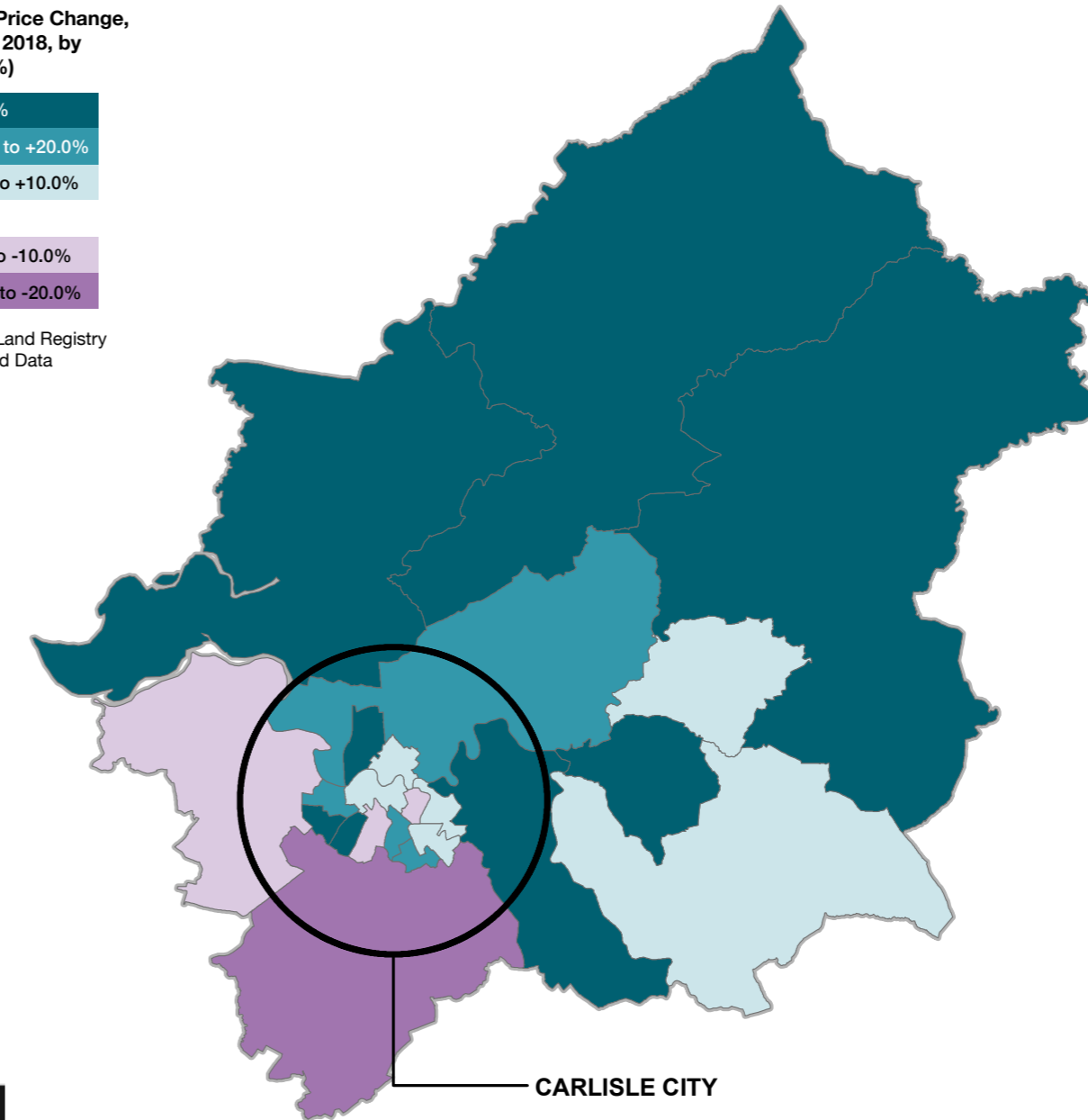
Carlisle
Local Authority

Rising House Prices

House Price Change,
2012 to 2018, by
Ward (%)



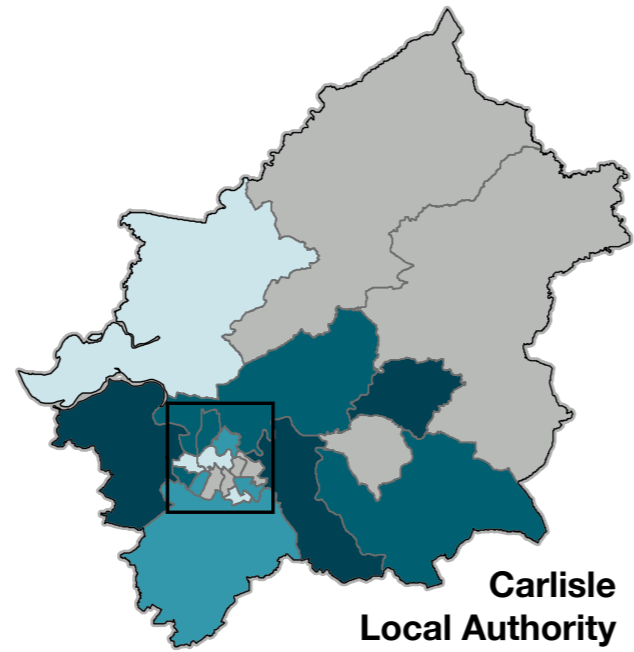
Source: Land Registry
Price Paid Data



CARLISLE CITY

- 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.

A Broad Range of Sales Values



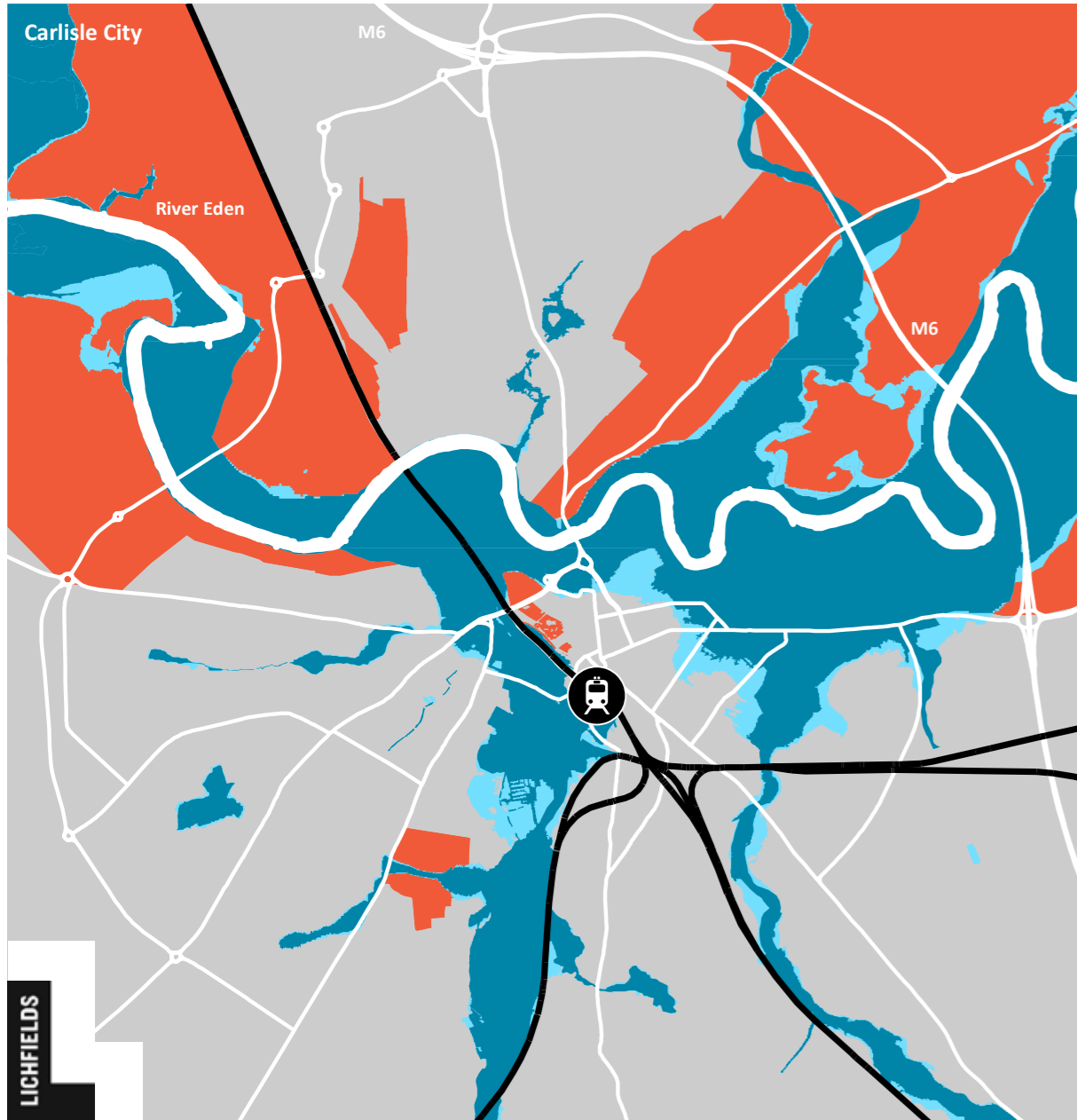
Average New Build House Price, 2016 to 2018 (by Ward)

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

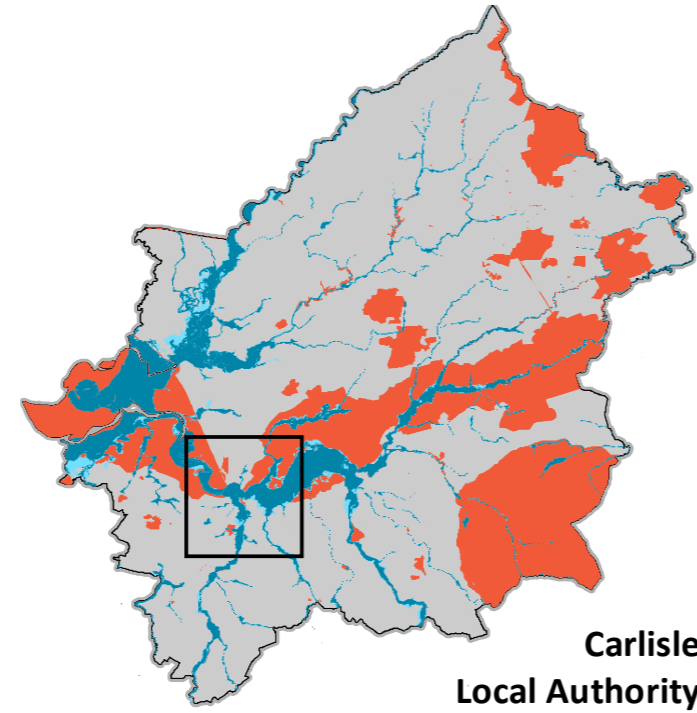
Source: Land Registry Price Paid Data



Planning Constraints



LICHFIELDS



Carlisle
Local Authority

- 66% of land area is free from NPPF footnote 6 constraints.
- All allocated sites are within Flood Zone 1.
- No Greenbelt.

Planning Constraints

- Flood Zone 2
- Flood Zone 3
- Footnote 6* Constraint

- * Areas of Outstanding Natural Beauty
- SSSI
- Special Protection Areas (& 400m buffer)
- RAMSAR
- World Heritage Sites
- Special Areas of Conservation
- Scheduled 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, including the transformative St Cuthbert’s Garden Communities, 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

Telephone: 01228 817200

Visit: www.carlisle.gov.uk/carlisle-business
and/or www.stcuthbertsgv.co.uk



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