

Mind the density gap

How Britain's big cities can build more homes near train stations

Maurice Lange, Anthony Breach and Luka Kovacevic
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Testimonials

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We're already leading the country on station devolution in the Liverpool City Region – and showing what can be achieved when transport, housing and regeneration are planned together.

We've made good progress, with 36,000 homes built since I was elected and have a pipeline to build a further 64,000 new homes across 300 sites, but this report shows there is much more we could be doing around our rail network.

We want to build on what we've started. Giving us greater control over stations and the land around them would open up more sites for development and help us build the homes our residents need, where the transport links already exist.



Mayor Steve Rotheram
Mayor of Liverpool City Region

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“

We have huge ambitions for Leeds and West Yorkshire, from over 20,000 new homes at Leeds South Bank to our landmark new Weaver Network, which will deliver seamless journeys across the region.

But to fully unleash the potential of our people and places, we need to make the most of devolution – joining up our ambitious plans for housing and skills with the transport links our communities and businesses are crying out for.

This research is a major vote of confidence in our West Yorkshire way – growing the economy by bringing together affordable housing with the skills training and transport infrastructure we need to build a stronger, better-connected region that works for all.



Mayor Tracy Brabin
Mayor of West Yorkshire

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Executive summary

The Government's new National Planning Policy Framework has made it easier to build homes around stations in England. New homes around stations in the green belt and in cities will produce lower housing costs, greater access to opportunity, and good growth across the country.

Previous Centre for Cities research has established that millions more suburban homes could be built around stations in the green belt,¹ and that large British cities are missing millions of homes within their inner city 'urban cores' as they have lower densities than their international peers in France and Japan.²

By considering these two questions together, this report investigates how many homes are missing around stations in cities compared to France and Japan. It finds:

- **At least 2.4 million homes are missing near stations in cities** across the 12 largest cities compared to international peers. Of these, at least 1.2 million are in inner-city 'urban cores'.
- Land around stations in British cities is often no denser than land not in walking distance of stations. **In Liverpool, Sheffield, and Newcastle, land around stations in urban cores is on average less dense than inner city land further away from stations.**
- **The average British city added 50 per cent fewer homes near stations compared to peers in France and Japan from 2011 to 2021.** 30 per cent of stations in Britain's big cities have seen little to no development near them.
- **In some British cities, densities are low because they lack public transport infrastructure.** In Leeds, 61 per cent of the density gap with its international peers is due to missing stations; in Bristol this rises to 64 per cent of the density gap.

The Government is right to change policy to make it much easier to build around stations. Mayors, local authorities, and transport operators will all play an important role in changing

1 Cheshire P & Buyuklieva B (2019), [Homes on the Right Tracks](#). Centre for Cities.

2 Lange M, Breach A & Kovacevic L (2025), [Flat Britain: the urban density gap and how to close it](#). Centre for Cities.

the built environment and closing these gaps around stations.

But for this action to deliver, large numbers of new homes rapidly, the pace of change must move more quickly. In particular, there is a risk that delays to mayoral control of stations slow down the development process and the devolution agenda.

To resolve this and get the homes built as quickly as possible:

- **The Prime Minister and Number 10 North should create a ‘fast track’ to mayoral control of stations.** By allowing mayors to assume control of stations under ‘enhanced partnerships’ rather than a statutory rail devolution application, mayors could gain the land and customer-facing infrastructure they need to begin regeneration schemes more quickly and easily.
- **Mayors should use Mayoral Development Corporations and Mayoral Development Orders to develop around stations.** These new devolved powers give mayors the ability to intervene and bring together infrastructure, simpler planning, and private developer interest to get new homes and commercial space built.
- **Planning policy at the mayoral and local level should aim for density around stations.** Spatial Development Strategies, local plans, and design codes all provide opportunities for local leaders to set out what scale of change to the built environment is appropriate around existing and new stations, unlocking new development sites and investment in cities.

01

Introduction

The new Prime Minister Andy Burnham has said he wants to see more “*higher density residential development*”.³ His call builds on recent moves by the Government to promote urban density, including the City Densification Fund and measures to encourage within-settlement development in the new National Planning Policy Framework (NPPF).⁴

This is all good news. Centre for Cities research has shown that British cities’ urban cores have a ‘density gap’ of 2.4 million dwellings compared to their peers in France and Japan.⁵ Higher densities would also help support local high streets,⁶ end the UK’s housing shortage and – by expanding local labour markets – increase productivity and growth in cities.⁷

Areas around train and other mass transit stations are often identified as prime locations for new homes. They can offer fast and direct access to city centre jobs and amenities, even when located further away from the city centre. The Government has identified that this is important for the success of Northern Powerhouse Rail, will fit into the Northern Growth Strategy, and will play an important role in the Local Growth Plans for which the mayors are responsible. Previous Centre for Cities research has established that millions of new homes could be built around stations in the green belt.⁸

To enable this, the Government has introduced new national minimum densities near ‘well-connected train stations’ in the NPPF, with additional measures to encourage planning for higher densities in the best-connected locations.⁹ This mirrors a growing international policy movement: from California to Sydney to São Paulo, cities across the world are making it easier

3 Pell M (2026), [Andy Burnham’s speech in full as he promises to give UK ‘new direction’](#). *Manchester Evening News*. [Accessed July 2026]

4 The City Densification Fund will allocate £800 million between the 6 Established Mayoral Authorities outside London. See: MHCLG (2026), [City Densification Fund: Place selection and allocation methodology](#). GOV.UK; MHCLG (2026), [National Planning Policy Framework](#). GOV.UK.

5 Lange M, Breach, A & Kovacevic L (2025), [Flat Britain: The urban density gap and how to close it](#). Centre for Cities.

6 Increasing population near high streets would help grow their ‘catchment’, which is negatively associated with high street vacancies: Swinney P Selby, O & Kovacevic L (2025), [Checking out: The varying performance of high streets across the country](#). Centre for Cities. Academic literature supports this claim internationally. For example, see: Koster HRA et al. (2019), [Shopping externalities and retail concentration: Evidence from dutch shopping streets](#). *Journal of Urban Economics*, 114.

7 On economic effects of density, see: Ahfeldt GM & Pietrostefani E (2019), [The economic effects of density: A synthesis](#). *Journal of Urban Economics*. 111. 93-107.

On the UK’s housing shortage, see: Watling S & Breach A (2023), [The housebuilding crisis: The UK’s 4 million missing homes](#). Centre for Cities.

8 Cheshire P & Buyuklieva B (2019), [Homes on the Right Tracks](#). Centre for Cities.

9 See Box 2 below for discussion of how policies in the new NPPF are likely to influence densities.

to build denser near to ‘mass transit’ (i.e. railway, metro, tram, and subway) stations.¹⁰

The Government is pairing this with changes to transport policy too. The Government’s ‘rail reform’ programme is uniting ‘track and train’ with Great British Railways. This will be combined with rail devolution to the metro mayors, and some suburban stations are already being transferred from Network Rail to mayoral control. The Prime Minister has separately stated that his Government will give away more publicly owned land to mayors to unlock development.

With policy attention turning to building homes around mass transit infrastructure, this paper answers the important questions that result:

- How many stations do British cities have?
- Do British cities obviously struggle to add housing near stations?
- How much of the density gap could be addressed by densifying near stations?
- What can the Government do in the short term to help build homes near stations in urban areas?

This briefing uses Centre for Cities’ residential densities dataset to answer these questions, comparing outcomes in Britain’s largest cities to their peers in France and Japan. This dataset and wider methodology – including the distinction between the inner-city ‘urban core’ and the ‘outer suburbs’ – are explained in the Appendix.

Section 2 compares mass transit coverage between cities in Britain, France and Japan. Section 3 compares the density of neighbourhoods near stations and recent progress on building near stations, and sets out the ‘size of the prize’ for densification and discusses the role of mayoral ownership of stations in densification. Section 4 provides recommendations to local, mayoral and national government on accelerating the development of more homes near stations. Section 5 shows maps for each city on how much densification is occurring around its stations along with an example of high-density development near a rail station in each area, followed by the Appendix.

¹⁰ California State have introduced minimum height requirements on stations, varying by regularity of service and location. It also includes an ‘inclusive zoning’ measure, requiring a minimum proportion of rent stabilised homes. California Legislature (2025), [Senate Bill, No 79](#). New South Wales state government enacted its Transport Oriented Development policy, ‘upzoning’ around 31 existing stations and plans for 6 new stations in Sydney. See: Kozaki D (2024), [More train and metro station precincts to be allowed high-density housing to help ease Sydney’s housing crisis](#). ABC News.

In 2016, the Workers’ Party in São Paulo implemented a new zoning system which included ‘transformation’ zones to promote higher densities along transport corridors. Academic research has found this led to more permits and lower house prices. See: Anagol S, Ferreira F.V. & Rexer J.M. (2026), [Estimating the Economic Value of Zoning Reform](#). American Economic Journal: Economic Policy. Working paper for the same study is free to view via the [National Bureau of Economic Research](#).

02

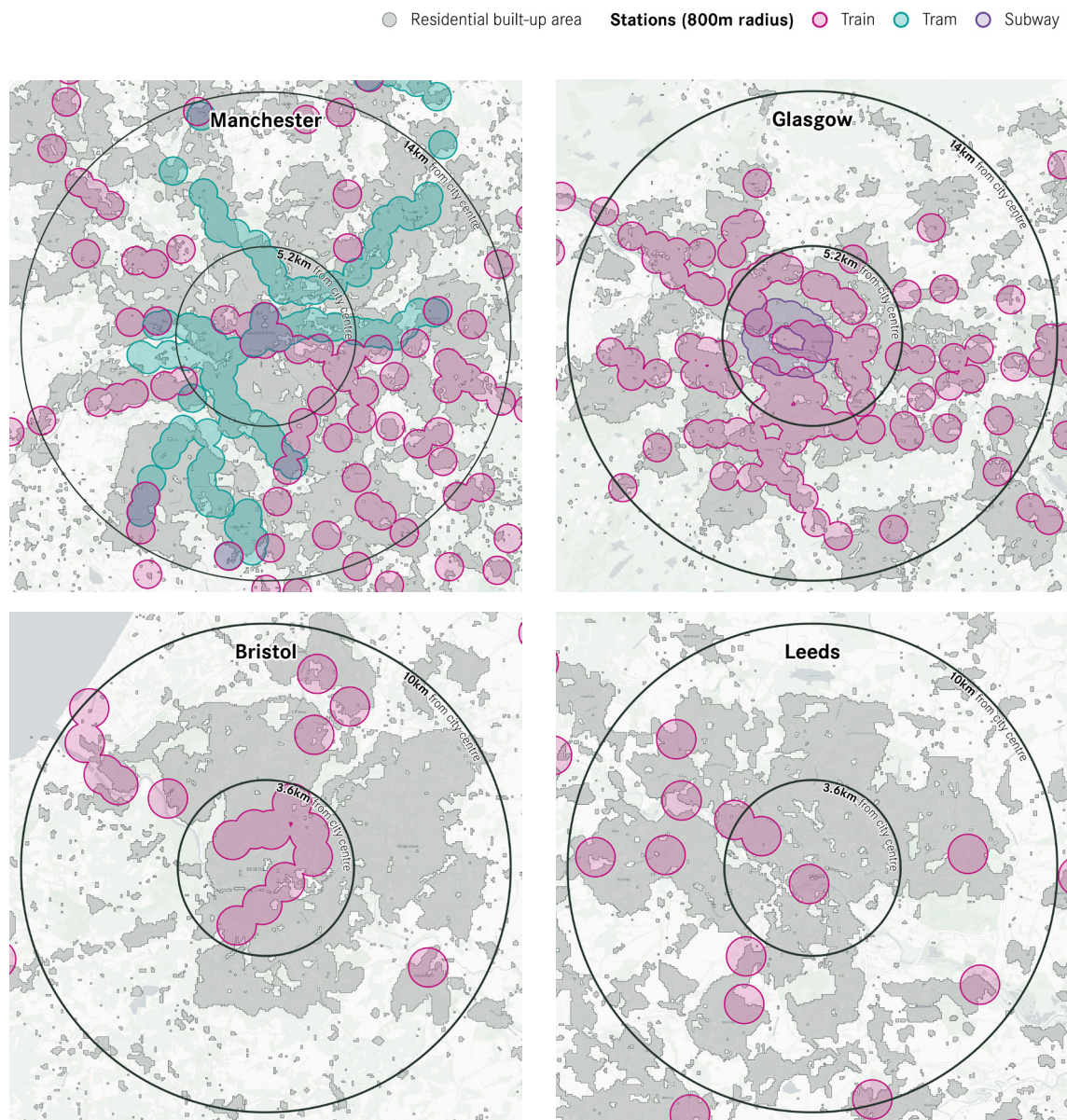
Mass transit coverage varies between British cities

Mass transit infrastructure varies significantly between British big cities

As the maps in Figure 1 show, Manchester and Glasgow have a large share of their residential built-up area within 800 metres of mass transit stations. Bristol has a good amount of coverage inside its inner-city urban core, but very little in its outer suburbs. Leeds does not have many stations anywhere in the city.

This means that **policy focused on densification around stations would have a much greater impact in some cities than others.**

Figure 1: Rail coverage varies significantly between different cities



Source: OpenStreetMap

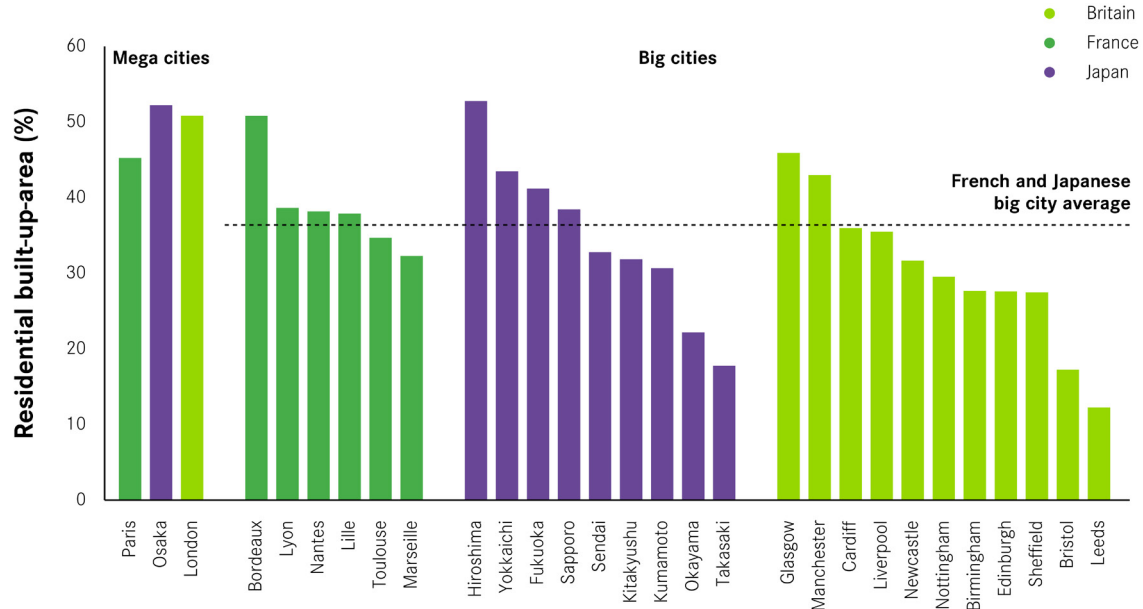
Most British cities have lower station coverage than cities in France and Japan

Figure 2 compares large British cities to their French and Japanese peers in terms of the percentage of the city's residential area that is within 800 metres of a mass transit station.

There is variation between big cities in all three countries, but the British distribution sits generally below that of Japan and France. **Leeds and Bristol stand out as having less than half the station coverage of the average French and Japanese big city.**

Figure 2: Rail coverage varies in all countries

Percentage of residential built-up-area within 800m of mass-transit stations, mega and big cities in France, Japan and Britain



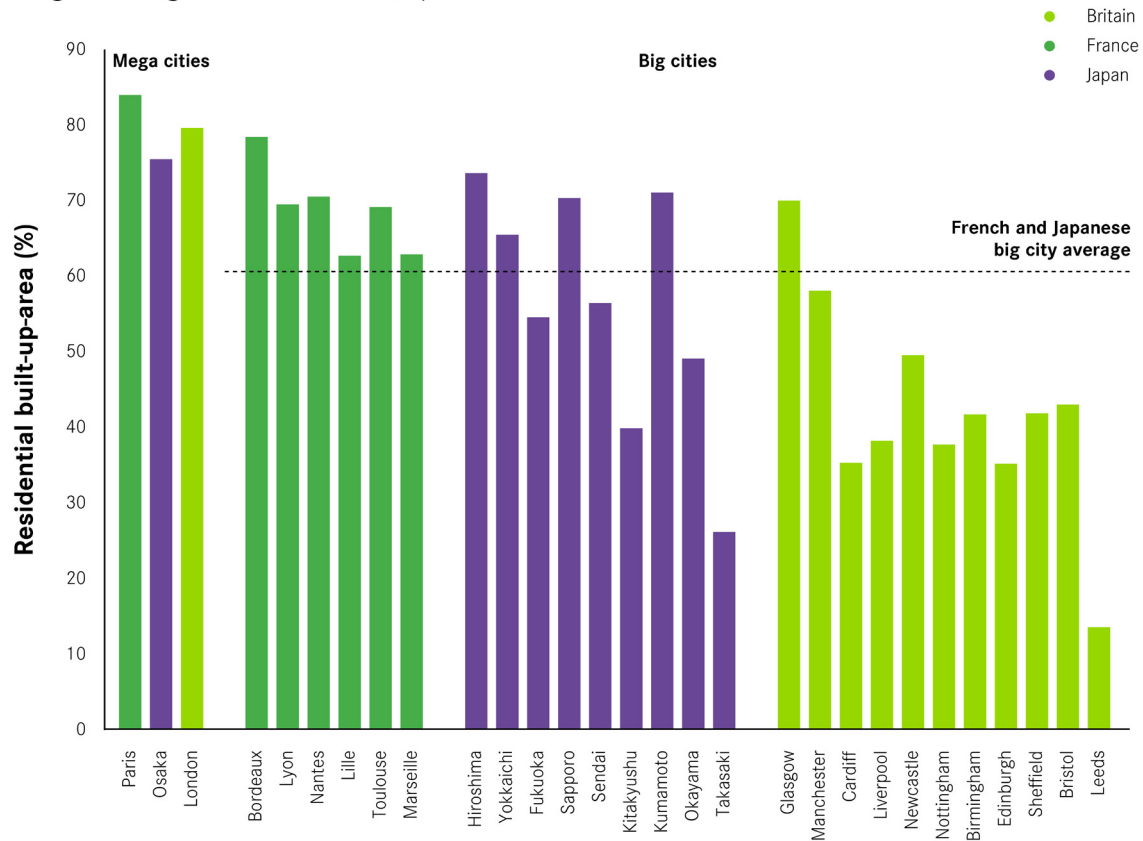
Source: Centre for Cities international residential densities dataset and OpenStreetMap

Figures 3 a and b show that this **lower mass transit coverage in British cities is mainly driven by lower coverage within their inner-city ‘urban cores’**. While over 50 per cent of urban core residential areas are within 800 metres of stations in all French cities and two-thirds of Japanese cities, Manchester, Glasgow and London are the only British cities that achieve this level of urban core coverage.¹¹ Leeds stands out for having by far the lowest urban core mass transit coverage of any big city.

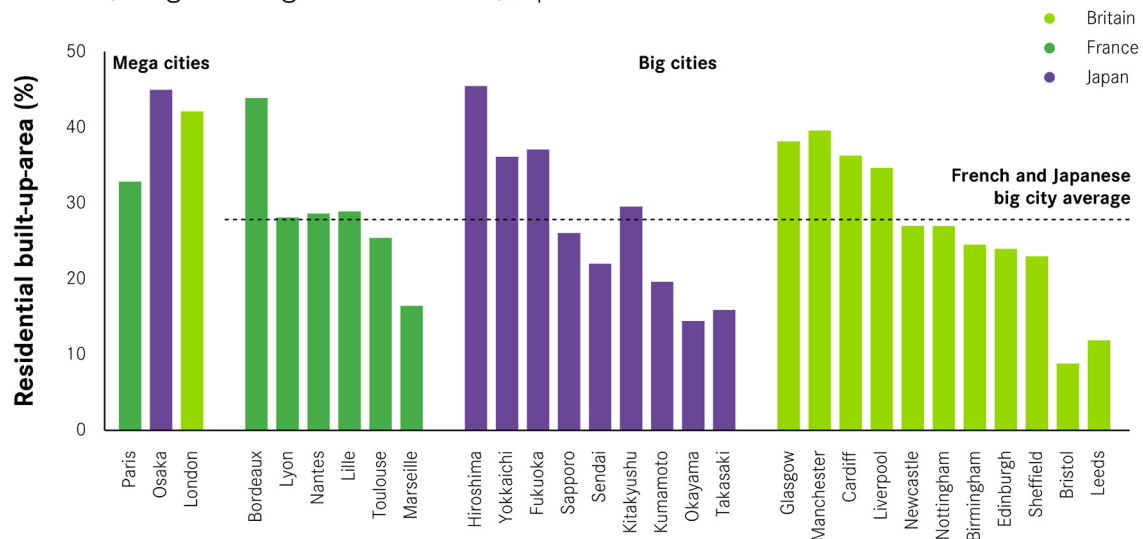
¹¹ It is also worth noting that French cities also have a greater diversity of mode types (relying on traditional rail less than British cities), and more places covered by multiple stations.

Figure 3 a and b: British cities have low rail coverage in their urban cores

Percentage of **urban core** residential built-up-area within 800m of mass-transit stations, mega and big cities in France, Japan and Britain



Percentage of **outer suburb** residential built-up-area within 800m of mass-transit stations, mega and big cities in France, Japan and Britain



Source: Centre for Cities international residential densities dataset and OpenStreetMap

In the suburbs, most British cities have comparable mass transit coverage to their French and Japanese peers. The only cities with an obvious deficiency in outer suburb coverage compared to Japanese and French cities are Leeds and Bristol.

This pattern of mass transit coverage could, in theory, help explain British cities' density gap. British urban cores have less direct transport to city centres, so the advantage of living there from an accessibility point of view is lower.¹² This in turn reduces demand and competition for urban core land as compared to that further out, resulting in 'flatter' British cities where densities do not vary as much as in peer cities (see Box 1 in the next section).

But this can only be part of the story. Previous Centre for Cities research has shown that these British cities with very different levels of mass transit coverage do not have the significant differences in housing density you might expect as a result.¹³ The explanation for the relatively homogenous built form within and between British cities is broader than just levels of public transport infrastructure.

¹² This research is not able to fully compare accessibility between cities as we do not consider regularity of service or other transport modes. Previous Centre for Cities research has shown that the proportion of the population that can reach the city centre by public transport within 30 minutes is generally lower in British big cities than in their European peers. See Figure 3 in Rodrigues G & Breach A (2021), [Measuring up: Comparing public transport in the UK and Europe's biggest cities](#). Centre for Cities.

¹³ See: Section 2 of Lange M, Breach A & Kovacevic L (2025), [Flat Britain: the urban density gap and how to close it](#). Centre for Cities; and Section 2 of Lange M & Kovacevic L (2026), [Course correction: How to densify British cities](#). Centre for Cities.

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British cities are not making the most of their mass transit infrastructure

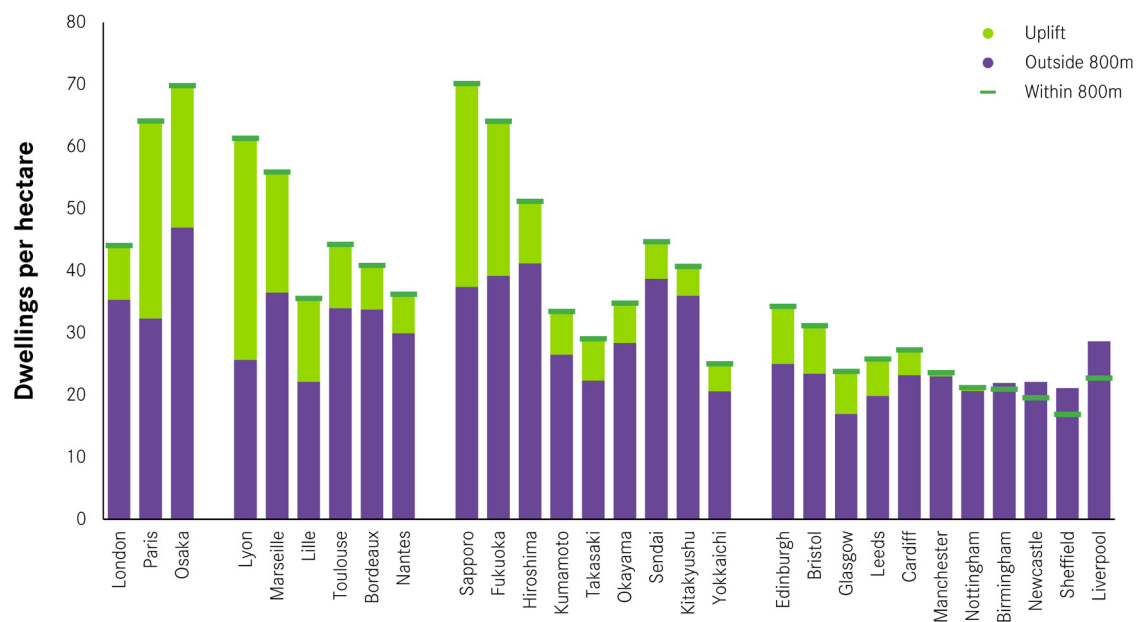
Large British cities do not just lack stations compared to their French and Japanese peers. Of the stations they do have, they are also failing to make the most of the land around them.

In theory, density should increase closer to mass transit infrastructure as it can offer fast and direct access to city centres and the jobs and amenities located there. Different people will make different choices between space, journey time, and affordability.

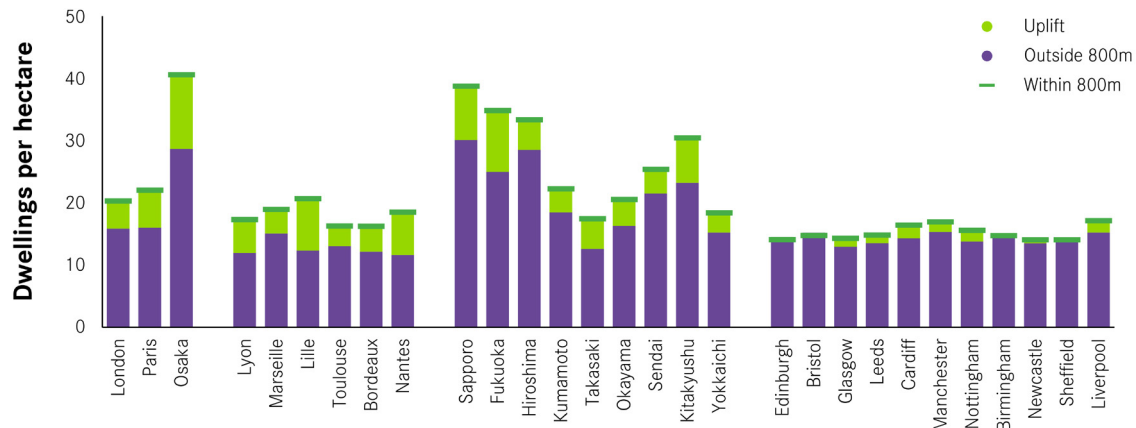
Figures 4 a and b show that theory is borne out in all cities in France and Japan, but **in British cities, housing densities near mass transit (green) are no higher on average than densities further away (purple).**

Figure 4.a and 4.b: British cities are rarely denser near train stations

Urban core average housing density within and outside 800m of mass-transit infrastructure, mega and big cities, France, Japan and Britain, 2020/22



Outer suburbs average housing density within and outside 800m of mass-transit infrastructure, mega and big cities, France, Japan and Britain, 2020/22



Source: Centre for Cities international residential densities dataset and OpenStreetMap • Note: ordered by absolute uplift in density within 800m of stations

In France and Japan, the largest density uplifts near mass transit stations are in urban cores. In larger cities like Lyon and Sapporo near-transit densities (green) in the urban core are nearly double those further from transit, while ‘baseline’ density further from stations (purple) is still higher than that in cities like Manchester and Birmingham.

Urban core density uplifts are generally much more muted in British cities, while **in Sheffield, Liverpool and Newcastle, densities are lower on average near stations than further away from them.**

In French and Japanese cities, densities around stations in the urban cores are between 13 and 139 per cent denser than land elsewhere in their urban core. This is a substantial range, but it is still higher than the levels of density around land in British cities, which range between -21 per cent and 40 per cent.

A similar pattern is seen in the suburbs. In French and Japanese cities, densities near stations range between 17 and 67 per cent higher than those beyond 800 metres. In British cities, the uplift varies between 0 and 15 per cent only.

This underlines findings from Centre for Cities’ previous research: whether it is proximity to city centres, as considered in previous research, or proximity to major transport infrastructure, British cities’ urban form does not vary much. These low densities – and resulting lack of homes – are shrinking the effective size of British cities’ labour markets and consumer catchments.

As Box 1 indicates, peer cities abroad have particularly high densities around the stations with the highest connectivity – suggesting that national and local policy has substantial potential to support higher housebuilding around urban stations.

Box 1: Mayors and local planners will need to push densities beyond minima set by the new National Planning Policy Framework

The new National Planning Policy Framework (NPPF) introduced in August 2026 includes new policies on both building near stations and housing densities:

- A presumption in favour of development within walking distance of ‘well-connected’ stations¹⁴
- Minimum densities of 45 dwellings per hectare of regularly served stations, and 35 dwellings per hectare near all other ‘well-connected’ stations¹⁵
- These minima should be exceeded where possible, pushing higher in areas with particularly high connectivity scores
- It encourages local plans both to set minimum density standards and maximum parking requirements in central areas and to maximise public transport use

Each of these policies is positive and can lay the foundation for more transit-oriented planning in British cities. But while it is the first two policies that have received much attention, it is the latter two that will need to do the heavy lifting to increase densities within cities.

Densities in other countries greatly exceed these limits around the best-connected stations, especially near city centres. As Figure 4 a and b and Figure 5 show, in French and Japanese cities, densities near stations trend higher the closer the neighbourhood is to the city centre, rather than a binary distinction between inner and outer areas of the city.

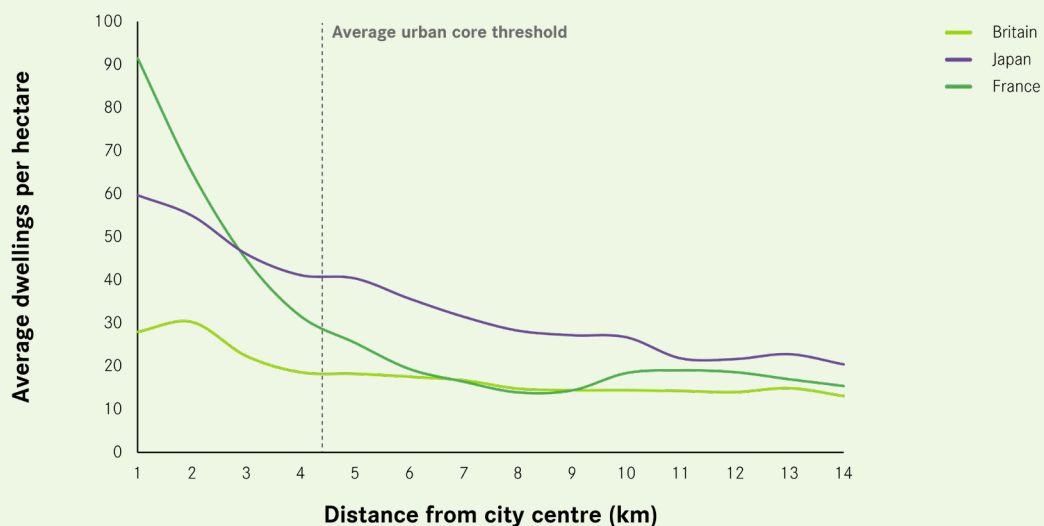
British cities will therefore only be able to match their peers if mayoral and local planning policies go beyond the NPPF and clearly support significantly higher densities on the best-connected land. Section 4 below sets out how they can do this.

¹⁴ Well-connected stations are taken to be those railway stations and underground, tram and light rail stops located within a top 80 Travel to Work Area located partially or fully within England by Gross Value Added and which, in the normal weekday timetable, are served (or have a reasonable prospect of being served due to planned upgrades or through agreement with the rail operator) throughout the daytime by at least four trains or trams per hour overall, or at least two trains or trams per hour in any one direction. MHCLG (2026), [Annex B, National Planning Policy Framework](#). GOV.UK.

¹⁵ The higher standard is for stations with twice or more trains per hour compared to the standard definition of well-connected.

Figure 5: Neighbourhoods in French and Japanese cities get much denser the closer they are to city centres

Average residential density within 800m of train stations, big cities in Britain, France and Japan 2020/22



Source: Centre for Cities international residential densities dataset and OpenStreetMap • Note on density measurement: Centre for Cities' residential density dataset and densities on individual sites are calculated in different ways, meaning y-axis values are not comparable to those in national or local planning policy. In planning terms, the density of the development usually only considers the area within the 'red line', thereby excluding the overall layout of the neighbourhood save for on very large developments. Our method excludes large non-residential areas like parks and industrial areas, but it includes smaller non-residential areas like roads, small car parks, verges and parklets, meaning substantially more housing is required to meet the same numeric density.

Delivery of densification around stations in British cities has been mixed

British cities face a challenge. Compared to their peers, they generally have fewer stations and fewer homes around the stations they do have.

This raises a final question – is the density gap around stations closing over time or are British cities falling further behind?

Figure 6 shows that on aggregate the answer is the latter – British cities are falling further behind. The average British big city built less than half the number of homes near mass transit stations compared to French and Japanese peers in the years between 2011 and 2021.¹⁶ London compares more favourably, coming second and significantly outperforming Paris.

¹⁶ This means that 10 large British cities combined built 158,000 homes in total, less than just 6 French cities (195,000), and 9 Japanese cities (237,000) in the same size category.

Figure 6: British big cities have built far less around train stations than their international peers

Net additional dwellings per city within 800m of rail stations, mega and big cities in Japan, France and Britain, 2010/11 – 2020/22



Source: Centre for Cities international residential densities dataset

Figure 7 breaks these aggregate figures down city-by-city to explain this underperformance.

The left chart shows that **British cities, including London, built around a lower proportion of stations than cities in France and Japan** between 2011 and 2021 – defining stations as ‘active’ if they saw an increase of 100 homes or more within 800 metres.¹⁷ In France, almost all stations met this threshold. In Japan, there is more variation, but all three of the larger big cities saw development around nearly all their stations.¹⁸ In British cities, meanwhile, one-third of stations were not ‘active’ and saw little to no increase in homes.

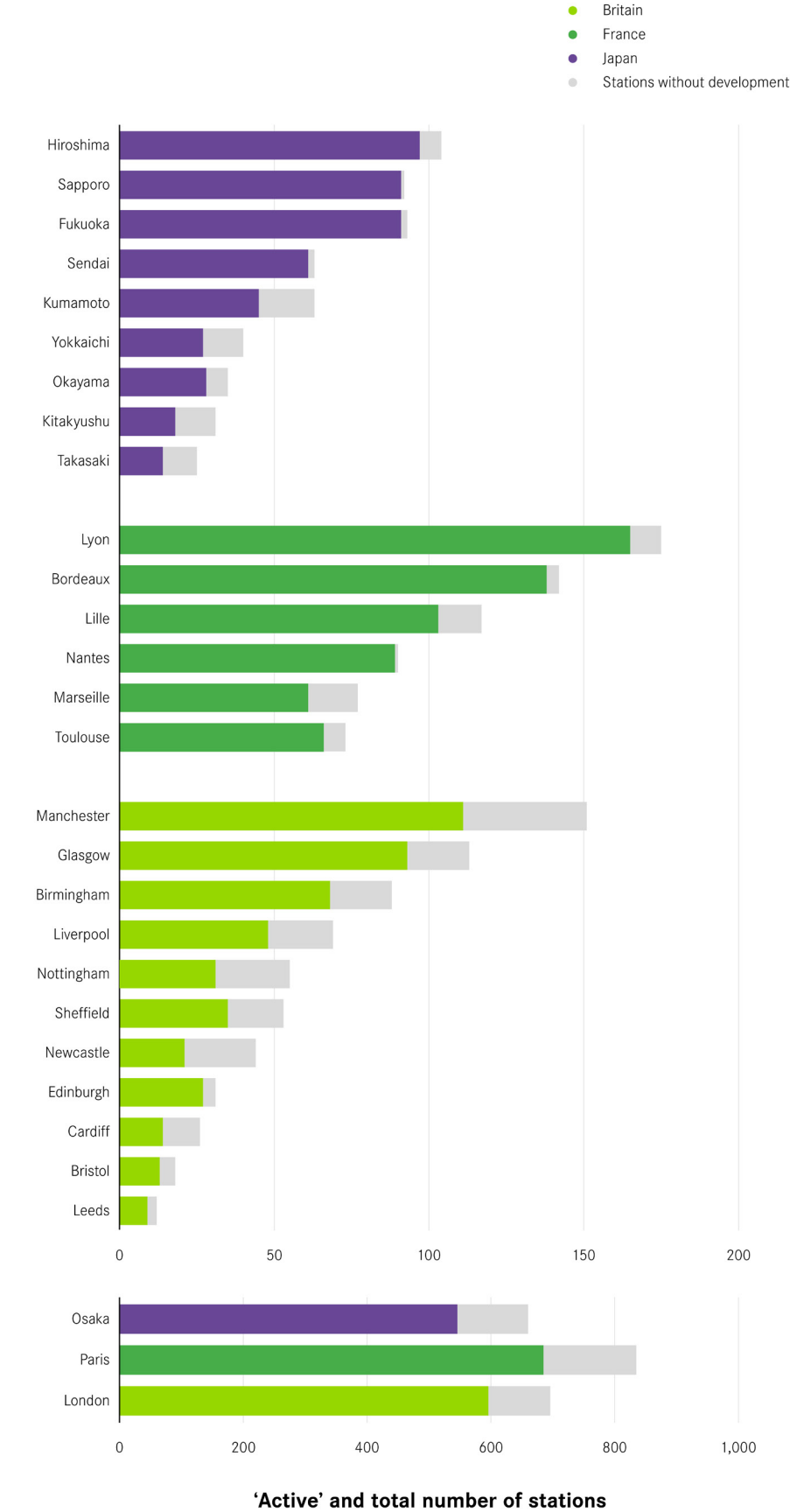
¹⁷ Dwellings that fall within the catchment of more than one station were counted towards both. The number of dwellings is estimated from total floorspace, and converted to ‘estimated British dwellings’.

See Box 1 in Lange M, Breach A & Kovacevic L (2025), [Flat Britain: the urban density gap and how to close it](#). Centre for Cities.

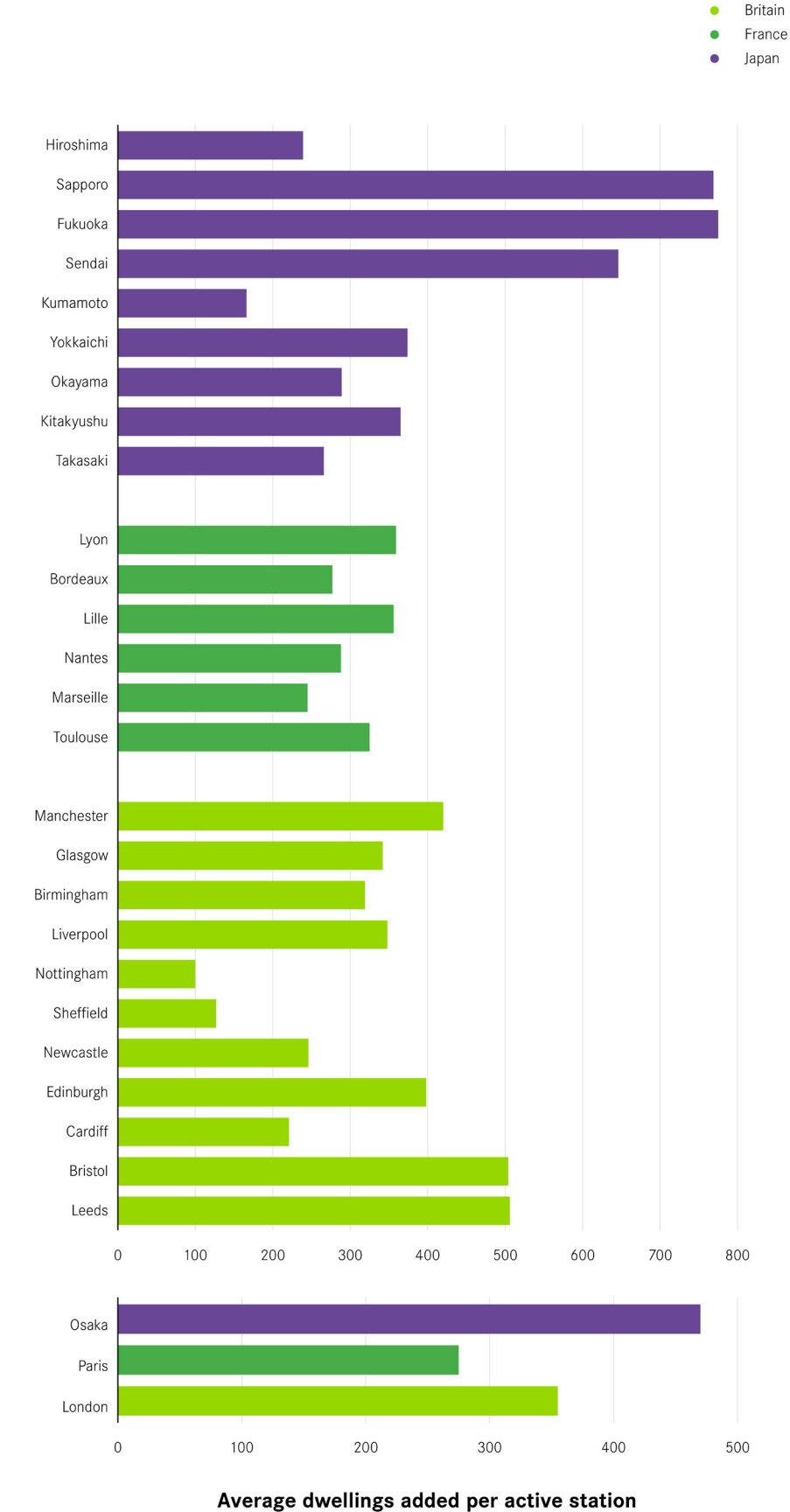
¹⁸ Sapporo, Fukuoka & Sendai (FUA population between 1.5 and 2.5 million).

Figure 7: British cities are building around fewer stations than many of their peer cities and build fewer homes as a result

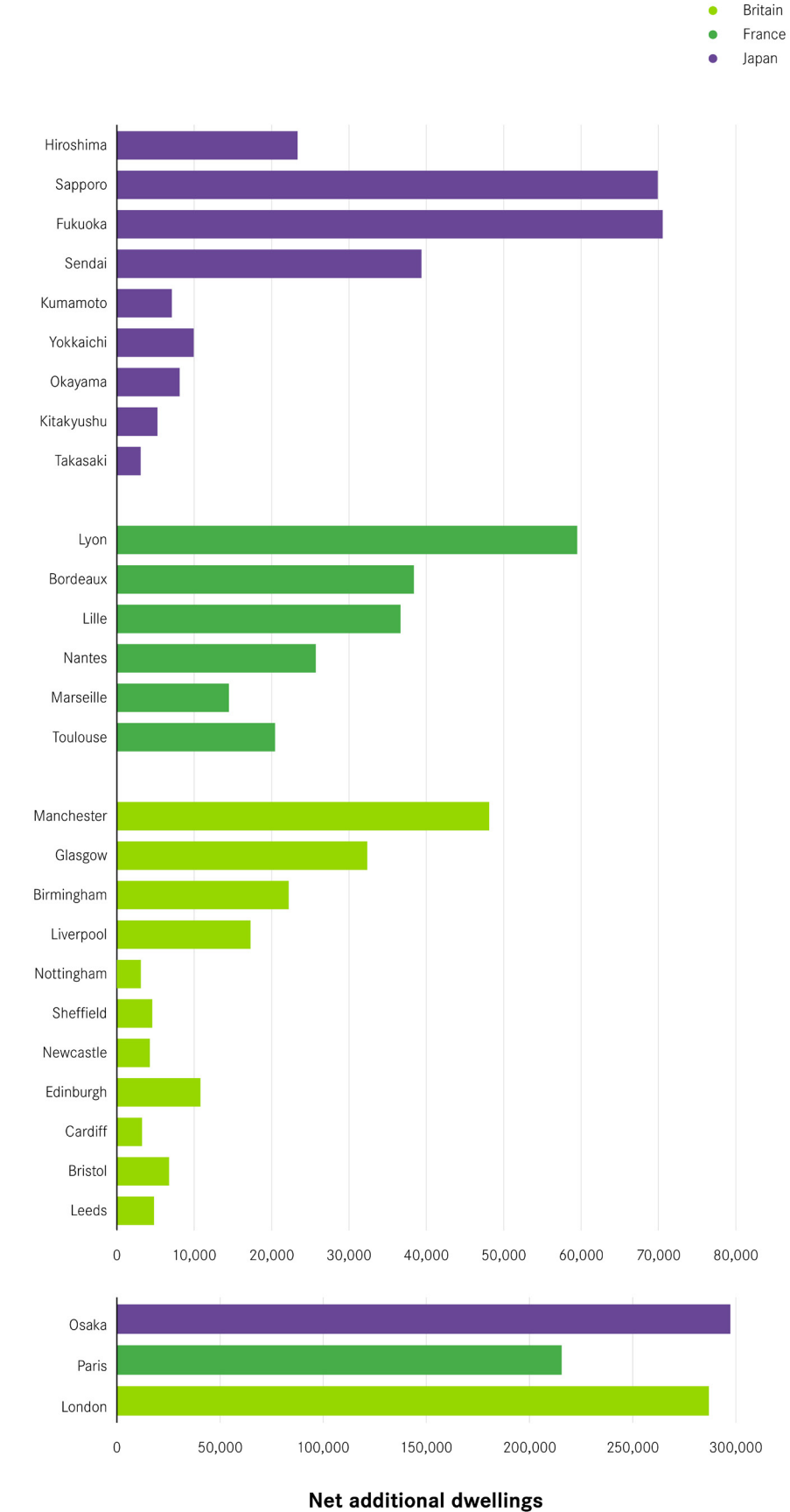
Number of ‘active’ stations that gained at least 100 dwellings within 800m, and total number of stations, 2010/11 – 2020/22



Average net additional dwellings within 800m of an ‘active’ station, 2010/11 – 2020/22



Net additional dwellings within 800m of all stations, whole city, 2010/11 – 2020/22



The central chart shows the amount of housing built around the average of these ‘active’ building stations. Results for British cities are mixed, though none has built as much around each station as the large Japanese cities.

The right chart shows the result of these two factors – the number of transit-oriented homes built between 2011 and 2021.¹⁹

Manchester is the highest performing British city, as a result of both its larger network and building around almost three quarters of stations. Glasgow, Birmingham and Liverpool have also all made significant progress, but a combination of having smaller networks and building less per station means they still underperform their peers in France and Japan.

Other cities have significantly underperformed on transit-oriented development for lack of housebuilding, rather than lack of network. For example, Sheffield and Nottingham have fairly substantial networks, with over 50 stations apiece. French and Japanese cities with similar station numbers have built around a higher proportion of them, built more around each ‘active’ station, and have added over double as many transit-oriented homes as a result.

Bristol and Leeds compare unfavourably because they have low station coverage. Both cities have built significant numbers around the small numbers of active stations they have – they just do not have that many of them.

British cities would have more homes if they had more stations and densified around them

British cities are less dense than their international peers. But how much of this is due to a lack of development and how much due to a lack of infrastructure varies between cities.

By comparing the density of land around stations and the number of stations that cities have to their international peers in France and Japan, a “station density gap” can be estimated. Table 1 sets out these estimates, with the number of homes missing due to a lack of stations expressed as a percentage.

The big cities outside London would have almost 1.3 million additional homes if densities around existing stations matched those in peer French and Japanese cities. And if the network coverage was also increased, this would increase to almost 1.7 million additional homes.

These effects vary between cities. If Leeds densified around its stations to French and Japanese levels, it would have an extra 62,000 homes – but if it had a comparable number of stations too, this would increase to 159,000. This lack of infrastructure is 61 per cent of the station density gap in Leeds, and 64 per cent of the gap in Bristol. By contrast, only 5 per cent of Manchester’s density gap is due to a lack of stations, and 0 per cent in London and Glasgow.

¹⁹ 2010-2020 in Japan, 2011-2022 in France and Scottish cities.

Table 1: Some cities need more stations to close their station density gap

	Density gap around stations closed only	Density gap and station gap both closed	Share of densification from new stations
Manchester	263,000	277,000	5.1%
Birmingham	211,000	281,000	24.9%
Glasgow	323,000	323,000	0.0%
Liverpool	142,000	198,000	28.3%
Leeds	62,000	159,000	61.0%
Sheffield	63,000	65,000	3.1%
Newcastle	72,000	94,000	23.4%
Nottingham	47,000	65,000	27.7%
Bristol	18,000	51,000	64.7%
Cardiff	28,000	40,000	30.0%
Edinburgh	35,000	62,000	43.5%
Big cities total	1,282,000	1,687,000	24.0%
Urban cores of big cities	729,000	1,046,000	30.3%
Outer suburbs of big cities	553,000	641,000	13.7%
London	1,117,000	1,118,000	0.1%
Big cities and London total	2,399,000	2,805,000	14.5%
Urban cores of London and big cities	1,264,000	1,582,000	20.1%
Outer suburbs of London and big cities	1,135,000	1,223,000	7.2%

Note: Estimates rounded to the nearest '000.

Table 1 has three big implications for policy:

First, **in most British cities, densifying around the stations they already have will be more important than adding more stations.** This means that policy will have to allow for substantial change in the existing built environment around stations if cities are to close their density gaps. Even when new stations are built in urban areas, sites and buildings will need to be redeveloped at higher densities if the full benefit of the investment is to be realised.

Second, **policy to close station density gaps will need to be concentrated in urban cores.** Just focusing on densification around stations urban cores of London and the other big cities will deliver as much housing – nearly 1.3 million new homes – as densifying around all the stations (i.e. urban core and outer suburbs) in the big cities. Densification around existing stations is likely to be less politically contentious in these inner urban areas, and will still result in substantial numbers of homes (e.g. 535,000 in London; 134,000 in Manchester; 183,000 in Glasgow – see Table 1a in Appendix 2).

Third, **variation between cities shows that devolution matters for the densification agenda.** As Section 5 shows, all of these cities are pursuing some form of regeneration and densification near local stations. Tackling opportunities for densification in each city will depend on empowered local leaders who know their place and can act on local priorities.

Stations in British cities are not under local control

These results are not surprising – the planning system makes it difficult to build new homes in urban areas, and cities find it difficult to add more stations to their network due to a lack of devolution over infrastructure investment.

But one factor that matters for densification of these neighbourhoods is local control of stations and the land immediately adjacent to stations.

In France and Japan, shared control of land between the owners of stations and developers is an important tool for densification.

In France, new tramlines have enabled thousands of new homes to be built by municipalities as master developer in the Deux-Rives project by the municipality of Strasbourg and in the Les Capucins development in Brest, among others across Metropolitan France.²⁰

In Japan, stations and surrounding land are often redeveloped by the railway company with the aim of densification, to increase passenger numbers and real estate revenues as well as the capacity of transport infrastructure. Examples often have a heavy commercial property focus, including Oimachi Tracks; the Chofu redevelopment; and Tanagawa Gateway City.²¹

In British cities this is more difficult as the owners of stations along with the land near them and the authority in control of the development process are different. While local government, including metro mayors, are responsible for the built environment, railway stations are normally under the control of Network Rail, a separate national body concerned primarily with transport.

20 Boquet Y (2017), *The renaissance of tramways and urban redevelopment in France*. *Miscellanea Geographica – Regional Studies on Development*, 21, (1), pp. 5-18; Strasbourg.eu (n.d.), *La ZAC des Deux-Rives/Zwei-Ufer, une ouverture vers le Rhin*. strasbourg.eu; Strasbourg Metropole (n.d.), *Qu'est-ce qu'un aménageur urbain*. strasbourgdeuxrives.eu; Ministry of Ecological Transition (n.d.), *Le Plateau des Capucins*. French Republic; Brest BMa (2023), *l'Ilôt F: un nouveau programme tertiaire, d'habitat et une offre medico-sociale dans le quartier des Capucins*. BREST-BMA.FR. [Accessed August 2026]

21 Urban Renaissance Agency (2025), *Transit Oriented Development (TOD) – Sharing our experience with the world*; Inazawa D (2026), *OIMACHI TRACKS: Pioneering Sustainable Urban Development in Tokyo*, INA Real Estate Intelligence; Sato M (2024), *大井町「大変貌」への布石 京浜東北線を止めた線路切替工事*, TRAICY; Sakuma K (2025), *JR launches part of newest train station in Tokyo, aims for int'l hub*. Mainichi Shimbun; Keio Group (2025), *Integrated Report 2025*. [Accessed August 2026]

Control of stations matters for transit-oriented development because:

- **Railway-owned land is often the single biggest site near stations.** These large sites are important for launching regeneration schemes because the land does not need to be assembled from smaller sites before work can begin. Sometimes this land is necessary for marshalling yards and similar but sometimes it is surplus to railway requirements. The King's Cross redevelopment in London was built out of a site just like this.²²
- **Split ownership can cause delays.** If infrastructure and development are controlled by very different organisations with different priorities, opportunities to invest in suitable locations can be delayed or missed. For example, Manchester Mayfield next to the mainline Manchester Piccadilly station has sat derelict for decades until its recent designation as a priority site for development in the Government's Platform4 scheme.²³
- **Local revenue streams are crucial for local investment.** More density means more commuters who require more infrastructure to retain easy access to workplaces. If the infrastructure provider and the developer are the same organisation, then revenues from the property development can finance the infrastructure investment that in turn makes the property development more valuable.

Control of their stations and the land around them will be the first step to regeneration for many urban neighbourhoods. Mayoral control of stations and surplus land adjacent to them is the greatest opportunity for devolution to help cities to densify around more stations than they are today.

Mayoral control of stations in England is already starting to happen. The metro mayor of Liverpool City Region signed a Memorandum of Understanding with Network Rail in 2023 to transfer local stations to Merseyrail.²⁴ Similarly, Greater Manchester set out a business case to take control of 64 stations as it integrates the Bee Network for rail in the city region.

But these measures are taking time to implement. Liverpool City Region is still in the process of receiving its first stations, as Box 2 describes. And, since 2021, Greater Manchester has only had one station under its control – Horwich Parkway.

Box 2: Liverpool City Region's control of stations will help unlock regeneration

Liverpool City Region is responsible for the Merseyrail network, which is distinct to the rest of the national railway network due to its 'third rail' electrification system. As a result, Liverpool City Region has always had more autonomy than other big cities over its rail network and been a leader on rail devolution. Earlier this year, Liverpool City Region

22 Bridgett S, Leeman T, Breach A (2022), [Making places: The role of regeneration in levelling up](#). Centre for Cities.

23 MHCLG (2026), [First-time buyers to benefit from 40,000 new homes on brownfield railway land](#). GOV.UK. [Accessed August 2026]

24 Liverpool City Region Combined Authority (2023), [Mayor Steve Rotherham signs trailblazer rail devolution deal to explore potential for taking back control of local rail network](#). liverpoolcityregion-ca.gov.uk. [Accessed August 2026]

agreed to take operational control of Merseyrail back under public control in 2028 to advance integration of the local transport system.²⁵

Merseyrail is adding new stations to the network and this is unlocking new development – Maghull North has seen new suburban homes in the suburbs of the Liverpool urban area, and the forthcoming Liverpool Baltic station is already enabling regeneration and development just south of the city centre ahead of its opening in 2027 (see Section 5).

Liverpool City Region signed a Memorandum of Understanding with Network Rail to transfer stations and take greater control of the operation and management of Merseyrail in 2023. As of 2026, the first stations are still being transferred from Network Rail control to Merseyrail. The combined authority has identified that there are opportunities to build new homes, improve access to work and opportunity, and increase investment around stations.²⁶

There are challenges to transferring stations and adjacent land to mayoral control – identifying land that is surplus and can be safely transferred from railway control takes time. Strategic authorities will need to demonstrate to the Office of Road and Rail that they can implement a Safety Management System under the Railways and Other Guided Transport Systems (Safety) Regulations 2006 (ROGS) before they can take control of their first station. Arrangements to manage network infrastructure present on stations, their maintenance, and the presence of railway staff will need to be agreed in each mayoral area.

At the current pace, though, extending this policy to mayors in other cities will take too long for it to unlock regeneration around stations quickly.

At present, the rail devolution guidance states that station control requires a “full devolution” application process, but that the Government’s “primary offer and preferred approach” is through “mayoral partnerships” where the railway network and operations remain under centralised control (i.e. Great British Railways).²⁷

Mayoral partnerships offer real advantages both for dealing with cross-boundary issues and the technical demands of running a railway. But customer-facing stations do not need to be controlled by the infrastructure operator to handle these challenges, and devolution of them does not necessarily require a separate application process to the enhanced partnerships model. Greater mayoral control of stations and land that is non-essential to the functioning of the railway around them is compatible with the Government’s rail reform agenda.

25 Merseyrail (2026), [Mayor sets out plan to take back public control of Merseyrail](https://merseytravel.gov.uk). merseytravel.gov.uk. [Accessed August 2026]

26 Liverpool City Region (2023), [LCR Sustainable Transport Settlement Prospectus](https://liverpoolcityregion-ca.gov.uk). liverpoolcityregion-ca.gov.uk. [Accessed August 2026]

27 DfT (2025), [English rail devolution applications: Official Guidance](https://gov.uk). GOV.UK; Great British Railways (2026), [Delivering local partnerships on England’s railways: A practitioners’ guide for building partnerships between Great British Railways and Mayoral Strategic Authorities](https://www.gbrailways.co.uk). Urban Transport Group. [Accessed August 2026]

04

What needs to change

British cities lack housing near stations. Matching the density of their peers could deliver big increases in the number of homes nationally and locally.

This section sets out what national government, mayors, and councils should do to build more homes near stations.

National government

Create a ‘fast track’ to give mayors control of stations

The Prime Minister and Number 10 North should make two changes to advance densification around stations:

1. Change the statutory rail devolution guidance to state that station control is in scope for ‘mayoral partnerships’.
2. Require that Network Rail produce ‘audits’ of the stations and land they control around each station in each established mayoral area within 12 months.

This would allow mayors to take control of stations and the land around them without going through the statutory “full rail devolution” application process. Securing greater local control more quickly makes it much easier for mayors to pursue densification and more likely that the Government can achieve its wider urban housing agenda.

Mayors would be able to assume control of stations on a rolling basis, starting with stations identified as simpler and with promising development opportunities by the audit, before expanding their scope to more complex stations at a pace that suits the mayor and the regulator.

Advance the planning reform agenda

England's planning system makes development in urban areas unusually difficult compared to its international peers. The new NPPF should help address this, but there is still further to go to address this problem. Other changes national government can make without reopening the NPPF to speed up development around stations in England and improve local viability include:

- **Ensure that NPPF 'development around stations' policy applies to stations under construction.** Rather than waiting for stations to be built or for national railway operators to confirm updated timetables from upgrades, mayors should be able to state that future stations qualify as 'well-connected' in NPPF terms. Guidance from Government should clarify that mayors under rail devolution can establish this status once the infrastructure delivery progress has hit a key milestone.
- **Increase funding for local planning teams, especially in cities targeted by the City Densification Fund.** This will ensure that local teams are equipped to take on the task of planning for densification in the current planning system, including the use of new mayoral powers.
- **Remove Biodiversity Net Gain requirements on brownfield sites.**²⁸ These requirements are particularly onerous for brownfield development on constrained sites, hit cities with lower land values especially hard, and are currently under review by DEFRA.²⁹ Defining brownfield land as sites where building curtilages make up more than 20 per cent of the site area will remove the BNG burden of environmentally friendly development on most urban sites while still retaining it for greenfield developments.
- **Adjust minimum space standards on one-bedroom flats and second staircase height limits to European sizes.** This would improve viability and affordability of regeneration schemes, particularly in cities where land values are lower.³⁰
- **Replace the discretionary planning system with a flexible zoning system.** The TCPA 1947 planning system's case-by-case planning system has always been restrictive in urban areas.³¹ Moving towards a rules-based but flexible zoning system, similar to Auckland in New Zealand, would increase brownfield housebuilding and improve affordability.³²

28 Breach A (2025), [Breaking the Bottlenecks: Reforming 'anti-supply measures' to support urban housebuilding](#). Centre for Cities.

29 DEFRA (2026), [Biodiversity Net Gain – considering a targeted exemption for residential brownfield development](#). GOV.UK. [Accessed August 2026]

30 Breach A (2025), [Breaking the Bottlenecks: Reforming 'anti-supply measures' to support urban housebuilding](#). Centre for Cities.

31 Breach A (2024), [Restarting housebuilding I: Planning reform and the private sector](#). Centre for Cities.

32 Breach A (2025), [A zoning system for England](#). Centre for Cities; Lange M & Kovacevic L (2025), [Planorama: How the English planning system can learn from abroad](#). Centre for Cities; Breach A (2023), [New Zealand shows how planning reform will end Britain's housing crisis](#). Centre for Cities.

Metro mayors

Use Mayoral Development Corporations (MDCs) to deliver regeneration around major stations

Strategic authorities can establish new planning authorities responsible for creating local plans and granting planning permission known as Mayoral Development Corporations. MDCs are particularly attractive for schemes that require substantial public sector involvement in delivering new infrastructure, place-making, and de-risking the scheme – essentially major regeneration sites.

Mayors are already using MDCs to deliver regeneration projects – examples include Stockport, Birmingham East, South Tees and more are on the way in North Liverpool, Bolton, and Leigh. In town centres and around major railway stations where mayors have big ambitions for regeneration and development, MDCs will be the quickest and best option.

In addition, for mayors looking to add more stations to their network, MDCs are the most promising option in the short term. MDCs give mayors powers to bring together new transport infrastructure with the development process, allowing mayors to densify by building new stations on their railway lines. Urban core locations should be the priority for these new stations, especially in cities where station coverage is low compared to their British and international peers.

Use new Mayoral Development Order powers to enable densification around stations

Currently, planning permissions are controlled by local authorities. But last month, the Government announced it will activate powers in the Planning and Infrastructure Act to unlock an alternative route to planning permissions controlled by the mayors – Mayoral Development Orders (MDOs).³³ These are likely to be more significant over the long term than the call-in powers that have so far received more media attention.

MDOs resemble Local Development Orders (LDOs), which are also a type of planning permission. Proposals which comply with the rules set out in the MDO will be guaranteed development consent – essentially a rules-based planning permission, distinct from the discretionary case-by-case process of an ordinary planning permission. This means they will be particularly helpful for unlocking development in urban areas.

MDOs will be a helpful tool for mayors to enable development around stations without the additional resources and capacity that MDCs require. Around smaller and more suburban stations, or where the public sector has little interest in acquiring land, MDOs will allow mayors to give certainty to developers to help them proceed through the development process.

Mayors should establish pilot MDOs as soon as possible so they and local authorities can ‘learn by doing’, as some of the more technical aspects of management of the development control process are set to remain at the council tier.

33 MHCLG (2026), [Planning powers for mayors in England](#). GOV.UK. [Accessed August 2026]

Separately, Government should in its regulations around MDOs make them difficult to remove. Private sector hesitancy towards LDOs in part stems from local authorities' power to remove LDOs 'at any time', making it difficult for developers to secure private finance for their activities. Ensuring that MDOs are at least semi-permanent will help make MDOs an attractive route for private developers.

Spatial Development Strategies should aim for density near stations

A new responsibility for metro mayors is strategic planning in their area. This will include the distribution of housing targets between boroughs, and broad policies that local authorities will need to incorporate in their local plans.

SDSs should explicitly permit high-density development around urban core stations, through high units per hectare minimum requirements, low or no parking requirements, and the removal of height limits, protected views and similar policies from local plans. These expectations around stations should be even higher than any policy on density in the urban core more generally, and be sensitive to local land market viability. These policies will take time to start shaping development outcomes, but the metro mayors will be responsible in the near future for writing the rules that will guide future development.

Local authorities

Use Local Development Order to support local densification

LDOs are similar but legally distinct to MDOs. They are implemented at the local authority level and have previously been used to deliver new homes, and are now strongly encouraged in the new NPPF. They are attractive as a tool for supporting infill densification because they are more rules-based and avoid the risky case-by-case process of the existing planning system. Local authorities can and should seek to pursue densification using LDOs, supporting and even going beyond the ambitions of mayors for local regeneration.

Local plans should aim for density near stations

Local plans have to comply with their mayoral SDSs, but they should also aim to set out ambitious policies for heights, minimum densities, minimal car parking and other similar requirements for development near stations. Boroughs in urban core or city centre locations should aim to provide as much certainty to developers as possible to maximise the impact of their local plans given local land values.

Croydon-style design guides around suburban stations

Around stations that could accept some redevelopment but not wholesale regeneration, design codes could be a good option for local authorities. Tailored to individual neighbourhoods and railway/tram lines, design codes that set out aesthetic parameters and quantify the development permissible could unlock mid-rise development along transport corridors without either the resource requirements of LDOs or the political disruption of sweeping densification policies across the urban area.

05

What each big city is doing to deliver more density near stations

Low residential densities are in large part a result of historic development patterns, and the need to densify is now widely recognised. In some way or another, cities in Britain have at least in part embraced the potential for transit-oriented development to capitalise on their transit networks and facilitate densification.

This section provides a more detailed insight into the range of policies implemented in each of the cities in this report, and maps the intensity of development around stations between 2011 and 2021, accompanied by illustrative examples of high-density developments near rail stations.³⁴

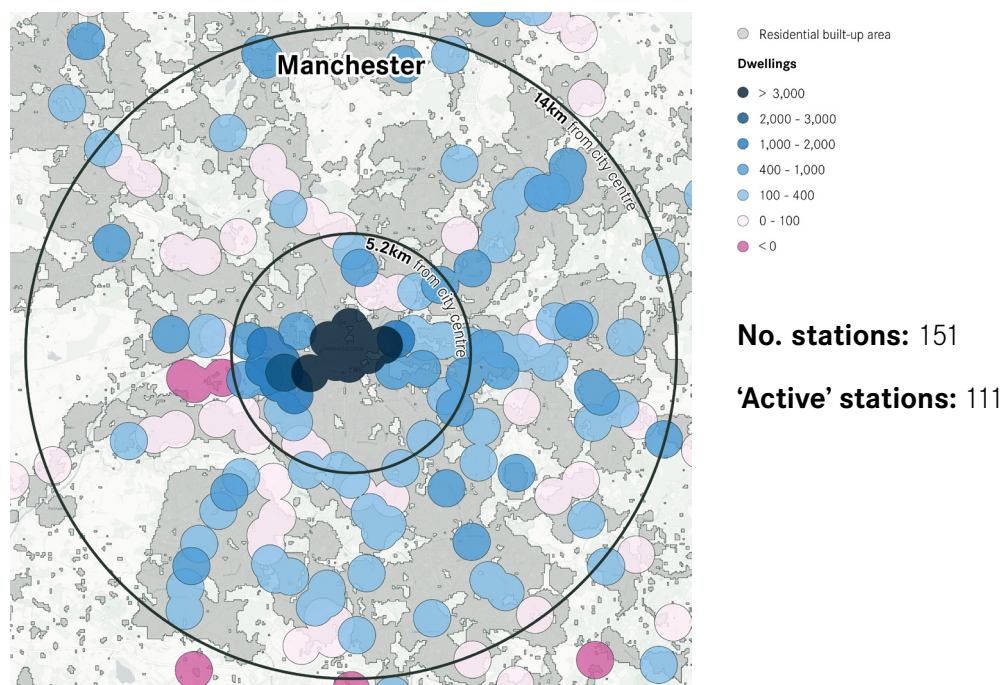
To skip ahead to a specific city, click the name in the list below:

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³⁴ The development period for Glasgow and Edinburgh covers 2011–2022.

Manchester

Figure 8: Additional dwellings near stations in Manchester, 2011-2021



Source: Centre for Cities international residential densities dataset, OpenStreetMap • Note: Where developments fall within 800 metres of more than one station they were counted towards development totals of all applicable stations. This applies to all subsequent maps in this section.

Manchester has the most expansive rail transit network out of Britain's big cities. Many of its stations have seen significant development, especially in the city centre.

Greater Manchester's current Spatial Development Strategy seeks to expand transport-enabled development across the city, using:

- Local Development Orders
- Mayoral Development Corporations such as Old Trafford MDC
- Releasing public sector land around transport infrastructure³⁵

The Joint Development Plan, applicable to most GMCA constituent authorities, introduces minimum densities tied to designated centres and public transport stops.³⁶

Manchester's approach to transit-enabled development has already resulted in high-density development near stations, particularly along the Metrolink Tram Network.

35 Greater Manchester Combined Authority (2025), [Together we are Greater Manchester – Greater Manchester Strategy](https://togetherwearegm.co.uk/). togetherwearegm.co.uk. [Accessed August 2026]; Greater Manchester Combined Authority (2026), [Mayoral Development Corporations and Zones](https://greatermanchester-ca.gov.uk/). greatermanchester-ca.gov.uk. [Accessed August 2026]

36 Greater Manchester Combined Authority (2024), [Places for Everyone Joint Development Plan 2022 to 2039](https://greatermanchester-ca.gov.uk/). greatermanchester-ca.gov.uk. [Accessed August 2026]

New Islington, 5 minutes from Manchester Piccadilly | 1.5km from city centre

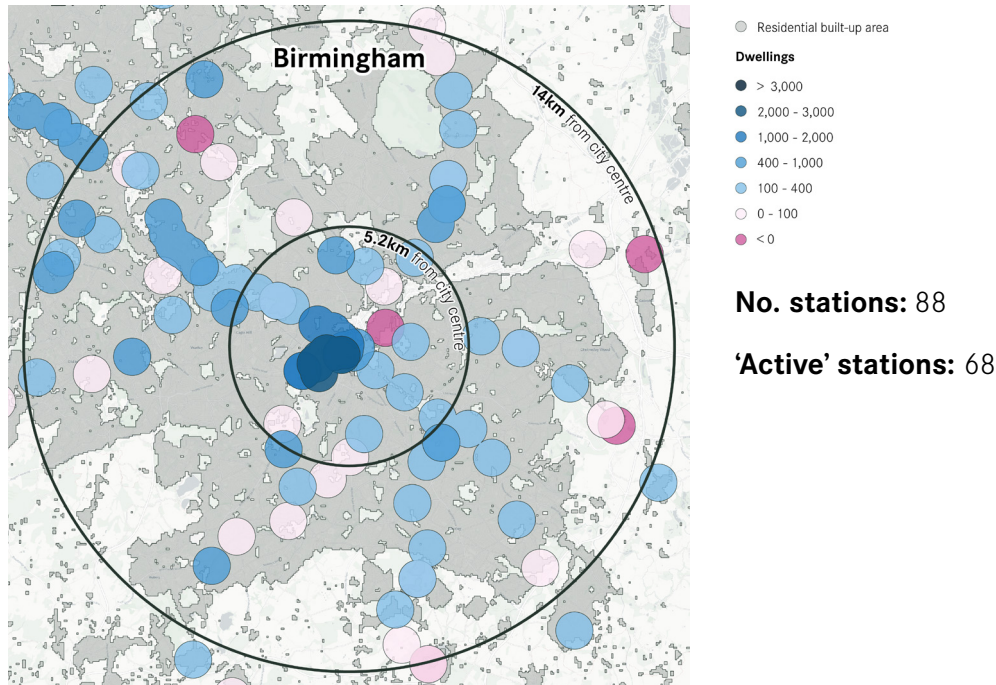


Source: Google Maps

Still, there is significant room for further transit-enabled development, with the greatest potential lying in densifying along Manchester's rail mass transit network. This could enable the development of 263,000 homes across the urban core and suburbs if densities around stations are brought in line with those observed in French and Japanese peer cities.

Birmingham

Figure 9: Additional dwellings near stations in Birmingham, 2011-2021



Source: Centre for Cities international residential densities dataset, OpenStreetMap

Birmingham is among the cities with the highest development activity around its stations, concentrated in the city centre and along its tram.

Birmingham City Council is currently preparing its next local plan, aiming to introduce a number of policies to raise development densities:

- Tripling minimum densities near transit nodes and urban centres
- Promoting development on brownfield sites and currently underutilised land³⁷
- Car parking limits and car-free developments in most of its urban core³⁸

³⁷ Birmingham City Council (2026), [Regulation 19 Publication Plan](#). birmingham.gov.uk. [Accessed August 2026]

³⁸ Birmingham City Council (2021), [Birmingham Parking Supplementary Planning Document](#). pp. 33-38. birmingham.gov.uk. [Accessed August 2026]

The city's approach to densification is already resulting in high-density new development around stations:

Perry Barr, 13 minutes from Birmingham New Street | 3.9km from city centre



Source: Google Maps

The potential for transit-enabled development is great: 283,000 homes could be developed across Birmingham if densities near rail stations and the rail network matched those observed in French and Japanese peer cities.

A quarter of these homes, 72,000 dwellings, could be unlocked through improving Birmingham's rail infrastructure. The east expansion of the Birmingham Metro and increased rail capacity through the Midlands Rail Hub are important steps in this process.

Glasgow

Figure 10: Additional dwellings near stations in Glasgow, 2011-2022



Source: Centre for Cities international residential densities dataset, OpenStreetMap

Glasgow is the only city outside of London with rail coverage equivalent to or greater than its French and Japanese peers. Between 2011 and 2022, the city also developed a substantial amount of housing near stations, particularly around subway stations in the city centre.

Glasgow City Council is currently preparing its next City Development Plan, introducing several new policies pushing densification around transit further:

- Minimum densities in areas with good public transport provision
- “Public Transport Priority Zones” with minimum densities to provide critical mass for further public transport investment
- Parking limits and car-free development near high-frequency public transport stations³⁹

³⁹ Glasgow City Council (2026), [City Development Plan 2 – Proposed Plan](https://glasgow.gov.uk/city-development-plan-2-proposed-plan). glasgow.gov.uk. [Accessed August 2026]

This builds on a number of recent dense developments in Glasgow, such as:

High Street Station, 1 minute from Queen Street | 1.3km from city centre



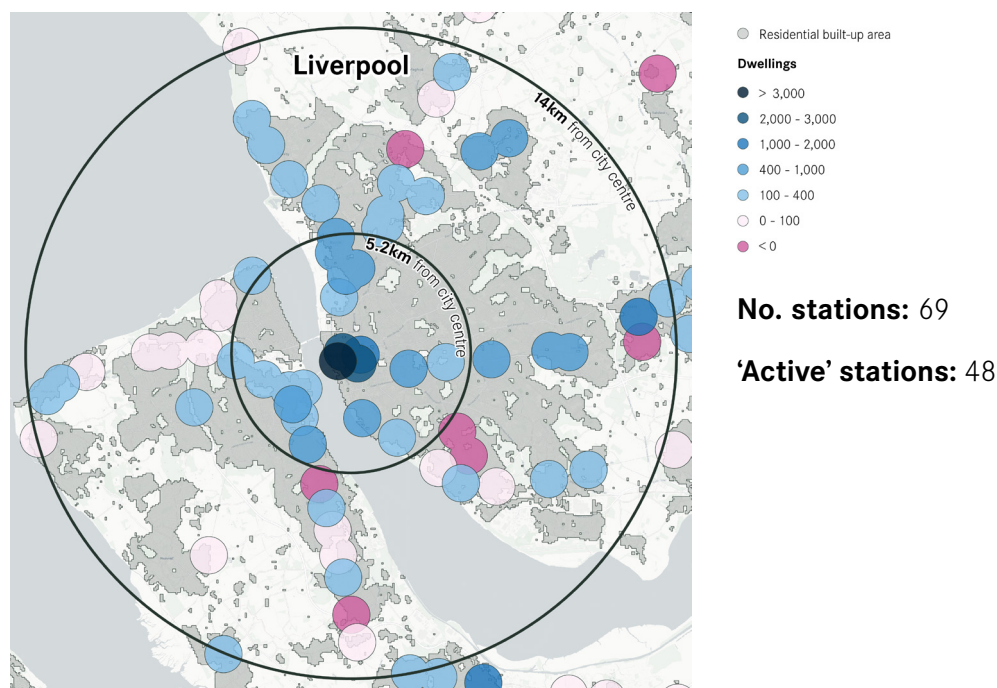
Source: Google Maps

Glasgow's entire potential for closing the station density gap lies in intensifying land around its existing network: 323,000 additional homes could be built in well-connected areas in its urban core and outer suburbs.

Enabling more developments such as the one above will be important in achieving this. The urban core should be a priority for densification as it contains over 55 per cent of Glasgow's station density gap, and the upcoming local plan policies are likely to address this challenge.

Liverpool

Figure 11: Additional dwellings near stations in Liverpool between 2011 and 2021



Source: Centre for Cities international residential densities dataset, OpenStreetMap

Liverpool has low densities next to its existing stations, particularly in the urban core. Figure 11 above shows that this is starting to change, with a concentration of new housebuilding in and near city centre stations.

While the Liverpool City Region Combined Authority is preparing its Spatial Development Strategy, the local plans of its constituent authorities contain various policies on transit-enabled densification:

- Liverpool City Council's draft plan requires optimal use of land near stations through a design-led approach⁴⁰
- Wirral is covered by Residential Density Zones, prescribing minimum densities based on proximity to transit, centres, and the waterfront. Extensive regeneration of Birkenhead is in part tied to transit infrastructure⁴¹

Across Liverpool, there is significant potential for transit-oriented development: over 198,000 homes in well-connected areas could be built if rail coverage and densities matched that of its French and Japanese peers.

Over 28 per cent of this would stem from increased rail provision. The planned Baltic Triangle station alone could enable the delivery of over 10,900 new homes if land around it were developed at peer densities, representing over 5 per cent of Liverpool's station density gap.

⁴⁰ Liverpool City Council (2026), [Proposed Submission - Liverpool City Council Local Plan 2043](#). liverpool.gov.uk. [Accessed August 2026]

⁴¹ Wirral Council (2025), [Wirral Local Plan 2022-2040](#). wirral.gov.uk [Accessed August 2026]

The city's current approach to densification has already resulted in some high-density development near the future station:



Source: Google Maps

Leeds

Figure 12: Additional dwellings near stations in Leeds, 2011-2021



Source: Centre for Cities international residential densities dataset, OpenStreetMap

Leeds has the lowest overall rail coverage out of Britain's big cities. Nonetheless, it is making the most out of the infrastructure it does have.

Leeds City Council's adopted local plan understandably focuses on city centre densification, though it is emphasised that locations with good accessibility to the centre are expected to densify, too.⁴²

42 Leeds City Council (2019), [Core Strategy \(as amended by the Core Strategy Selective Review 2019\)](#). leeds.gov.uk. [Accessed August 2026]

This has resulted in significant densification around Leeds station:



Source: Google Maps

The greatest gains are to be made by bringing Leeds's rail coverage and densities around its stations in line with those of French and Japanese peers, which would enable the development of 159,000 homes in well-connected areas across its urban core and suburbs. Almost two thirds of these homes would be enabled were Leeds to have rail coverage comparable to those of its peers.

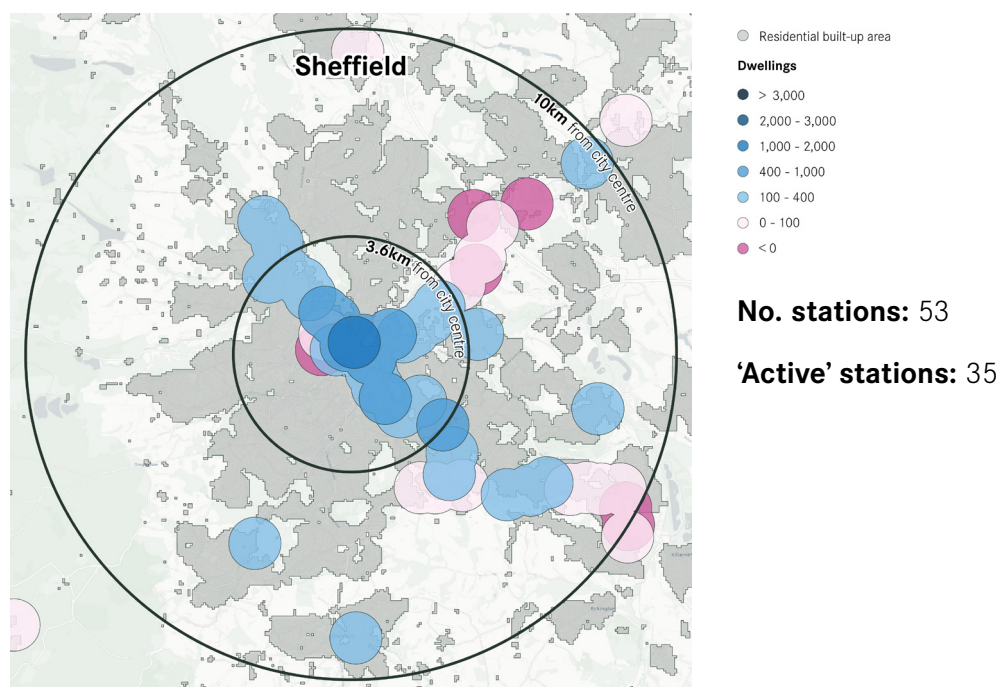
The proposed Leeds tram would introduce a mass transit system covering central and south Leeds, which could enable over 30,500 homes around new stations alone. This alone represents almost a fifth of the city's station density gap.⁴³

It is important to note that this estimate is based on densifying existing residential land, and so even more homes could be delivered on currently under-used land as a result of the tram.

43 Based on stops every 400-600 metres along lines L3 and L6 set out in the [Leeds Line route options](#).

Sheffield

Figure 13: Additional dwellings near stations in Sheffield, 2011-2021



Source: Centre for Cities international residential densities dataset, OpenStreetMap

In Sheffield's urban core, densities are lower nearer to stations than further away. However, its tram network has supported densification around its stations, particularly near the city centre.

Sheffield's draft local plan is also increasing density limits in well-connected locations and is promoting car-free, dense, and tall development in its centre.⁴⁴

44 Sheffield City Council (2022). [Sheffield Plan: Our City, Our Future – PART 2: Development Management Policies and Implementation](#). [Accessed August 2026]

One of the locations where the Supertram enabled densification is Shalesmoor:

Shalesmoor, 8 minutes from Cathedral | 1.2km from city centre

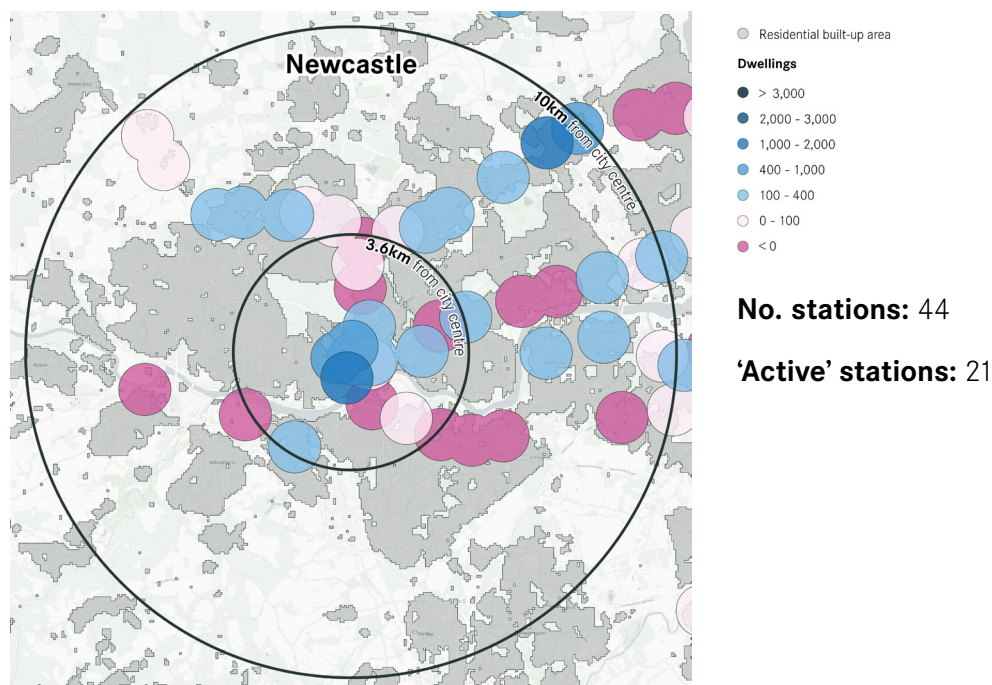


Source: Google Maps

Sheffield's rail network is of comparable extent to French and Japanese peer cities. The greatest potential for transit-oriented development is in densifying around its existing network, which could deliver 47,000 additional homes if densities matched those of peers. Almost three quarters of these would be located in the urban core, and so densification in and around the city centre should be a priority.

Newcastle-upon-Tyne

Figure 14: Additional dwellings near stations in Newcastle-upon-Tyne, 2011-2021



Source: Centre for Cities international residential densities dataset, OpenStreetMap

In Newcastle's urban core, densities are lower nearer to rail stations than further away. The North East Mayoral Strategic Authority (NEMSA) is currently preparing a Mayoral Development Zone (MDZ) to facilitate city centre densification in Newcastle and Gateshead, with further MDZs to be created in other urban centres across the authority.⁴⁵

⁴⁵ North East Mayoral Strategic Authority (2025), [Regeneration and development of the central areas of Newcastle and Gateshead](#), northeast-ca.gov.uk. [Accessed August 2026]

Newcastle is supported by the Tyne and Wear Metro, and densification is occurring in some city centre locations, for example around St. James station, which is also the headquarters of NEMSA.

St James | City centre



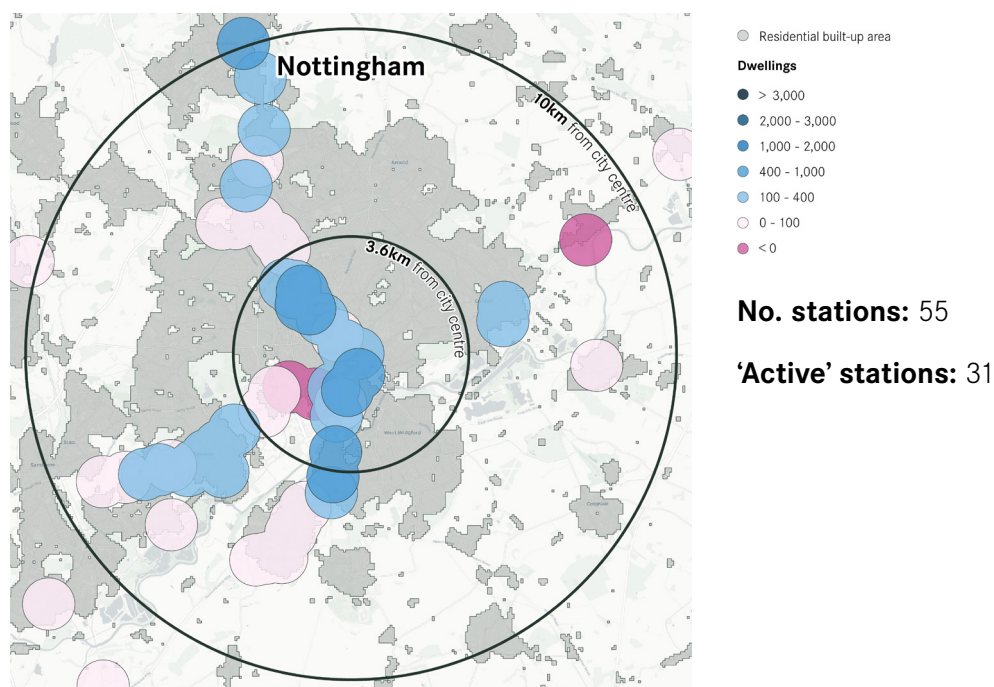
Source: Google Maps

The potential for transit-enabled densification around Newcastle's existing metro network is significant and should be a priority. Raising densities and rail coverage to those observed in peer cities could deliver over 94,000 additional homes across the city.

While most of these homes would be developed through densification, there is nonetheless great potential in increasing rail coverage. Over 22,000 homes could be developed around future rail stations in Newcastle.

Nottingham

Figure 15: Additional dwellings near stations in Nottingham, 2011-2021



Source: Centre for Cities international residential densities dataset, OpenStreetMap

Nottingham has built the fewest homes around rail stations out of all British cities, despite its extensive rail and tram network including Nottingham Express Transit (NET).

Nottingham City Council's adopted local planning documents state that:

- Higher densities are expected in and around the city centre, as well as in areas near well-connected transit nodes and regeneration areas
- Density must be of a density appropriate for its local context, and appropriate levels will be determined on a site-by-site basis
- Family homes are preferred outside the city centre, defined as up to three storeys tall, with larger and innovative solutions desired in certain instances⁴⁶

46 Nottingham City Council (2020), [Land and planning policies – Development Plan Document](#). nottinghamcity.gov.uk. [Accessed August 2026]

As a result, higher density development advanced the most in the city centre:

Nottingham Station | City centre



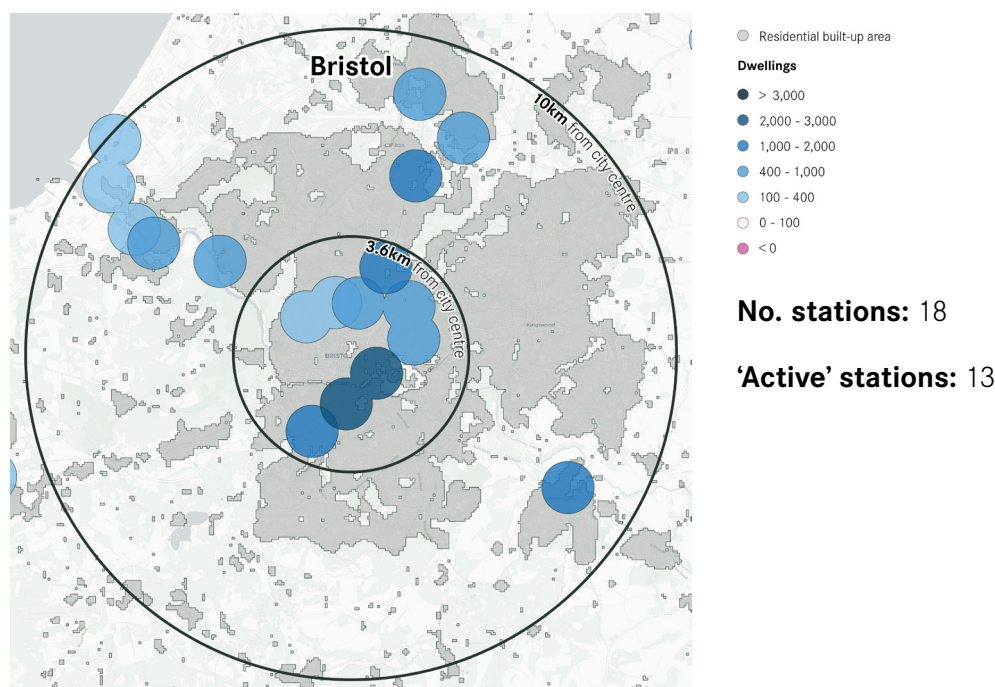
Source: Google Maps

As a result of its expansive network, the majority of transit-enabled densification will occur around existing stations.

Bringing densities and rail coverage in line with those of French and Japanese peer cities could result in 65,000 additional homes in well-connected areas across Nottingham. Over 25 per cent of these would be enabled through improving rail transit provision, with the largest potential for densification in the city's urban core.

Bristol

Figure 16: Additional dwellings near stations in Bristol, 2011-2021



Source: Centre for Cities international residential densities dataset, OpenStreetMap

Bristol has the second-smallest rail transit networks in Britain, with particularly low suburban coverage. It is, however, making the most out of the stations it does have and is building relatively densely around them.

Bristol City Council's local plan, adopted in 2011, provides exhaustive and specific guidance around density in the plan area. Noteworthy points include:

- Minimum densities based on proximity to urban centres and public transport accessibility, including appropriate higher densities in suitable locations⁴⁷
- Supplementary Planning Document on designing high-density places, including character assessments for the plan area mapping potential for densification⁴⁸

⁴⁷ Bristol City Council (2011), [Bristol Development Framework: Core Strategy](#). bristol.gov.uk. [Accessed August 2026]

⁴⁸ Bristol City Council (2018), [URBAN LIVING SPD: Making successful places at higher densities](#). bristol.gov.uk. [Accessed August 2026]

High-density development occurs around existing and future stations, including Brabazon (designated as a New Town after construction began):

Brabazon New Town, Station currently under construction | 7km from city centre



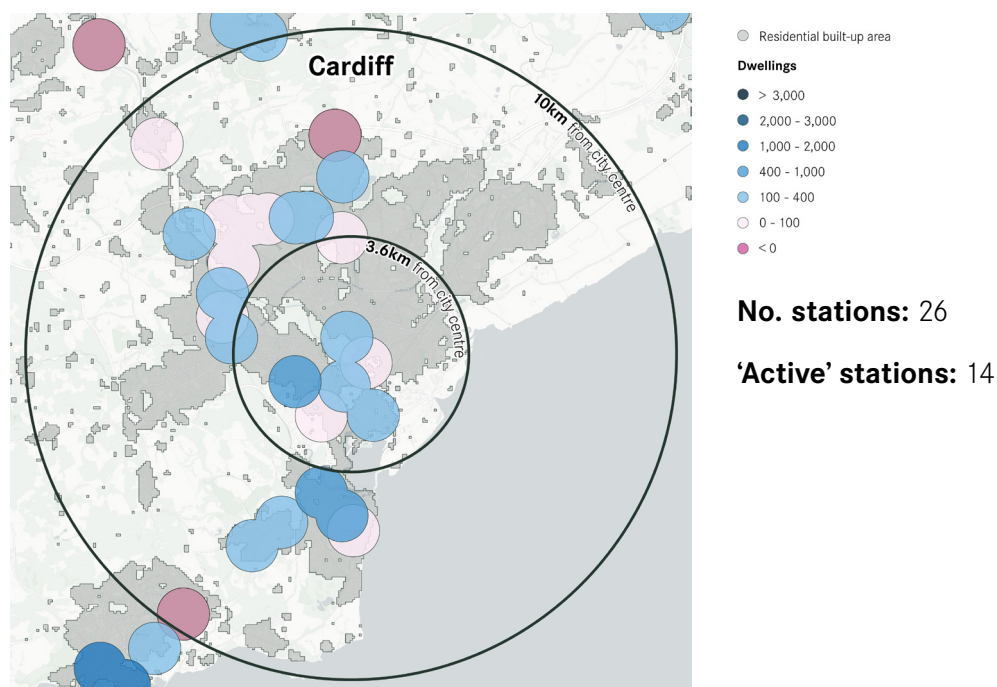
Source: Google Maps

Bristol has one of the lowest density gaps in Britain, as identified in previous research. Facilitating transit-enabled development around the city will instead require investment in transit infrastructure, particularly across its suburbs.

Raising rail coverage and density around stations to that of its French and Japanese peers could yield a total of 51,000 additional homes. Over two thirds of these (33,000 dwellings) hinge on significantly expanding rail transit in Bristol.

Cardiff

Figure 17: Additional dwellings near stations in Cardiff, 2011-2021



Source: Centre for Cities international residential densities dataset, OpenStreetMap

Cardiff's rail coverage is broadly in line with the British average, and densities around its stations compare favourably to other cities. However, few homes have been developed around its stations, with almost half seeing no considerable activity.

The draft local plan includes policies that may change this:

- Higher-density development is expected along transit corridors and urban centres, with taller buildings allowed in accessible locations
- Higher minimum densities across the city, sensitive to public transit provision⁴⁹

49 Cardiff Council (2025), [Cardiff Replacement LDP – Deposit Plan](#). cardiffldp.co.uk. [Accessed August 2026]

Most high-density developments so far have occurred in the city centre, such as:

Cardiff Queen Street | City centre



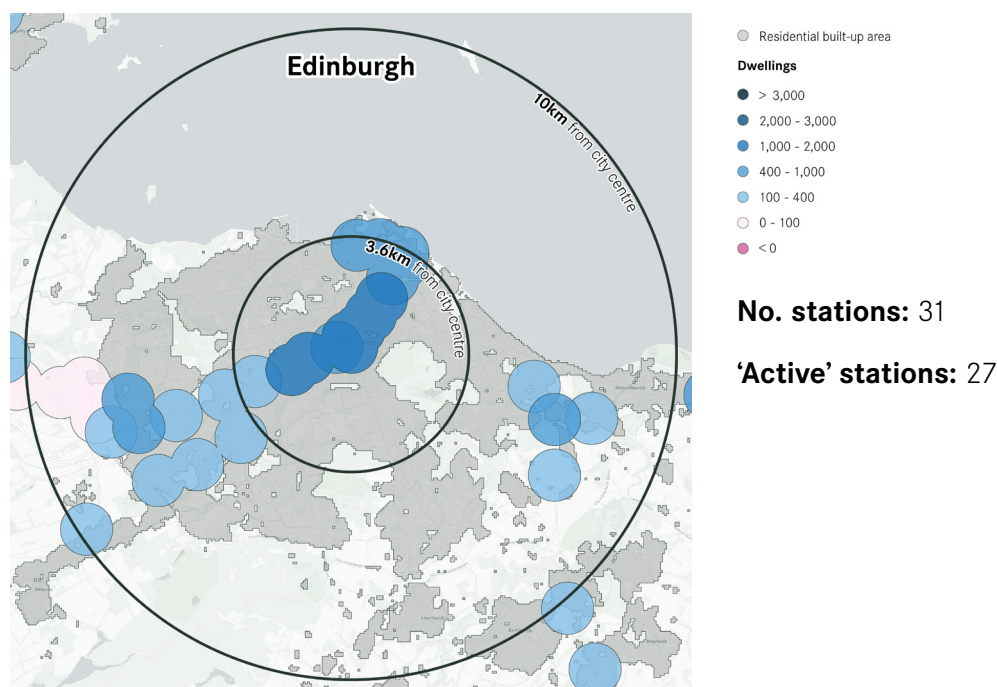
Source: Google Maps

Raising densities near stations to levels observed in French and Japanese peer cities should be a priority. Doing so could deliver 28,000 additional homes across Cardiff, over two thirds of which would be in the urban core.

However, there is also a gap in rail coverage relative to Cardiff's peers. Improving rail transit to match that of its peers could enable the development of a further 12,000 homes across the city, representing 30 per cent of the station density gap.

Edinburgh

Figure 18: Additional dwellings near stations in Edinburgh, 2011-2022



Source: Centre for Cities international residential densities dataset, OpenStreetMap

While Edinburgh's rail network is relatively small, it has developed around the largest share of its stations out of all cities in Britain. Edinburgh's urban core is already of relatively high density, and development between 2011 and 2022 continued this trend along most urban core tram stations.

Edinburgh's most recent local plan emphasises the continuation of high-density development in much of the city by:

- Making high-density neighbourhoods a strategic priority for the city
- Clear density ranges for all allocated sites⁵⁰

⁵⁰ City of Edinburgh Council (2024), [City Plan 2030: Written Statement](#), edinburgh.gov.uk. [Accessed August 2026]

The city's approach to density has resulted in a number of high-density developments around its stations, such as:

Ocean Terminal, 17 minutes from St Andrew Square | 3.5km from city centre



Source: Google Maps

If density around stations and rail coverage in Edinburgh matched that of its French and Japanese peers, 62,000 homes could be built in well-connected areas across the city. Over 40 per cent of these homes could be unlocked through expanding rail coverage and developing new stations in line with peer densities.

London

Figure 19: Additional dwellings near stations in London, 2011-2021



Source: Centre for Cities international residential densities dataset, OpenStreetMap

Between 2011 and 2021, London built a large number of homes around its stations, particularly in its urban core. In aggregate, London significantly outperformed Paris even though it developed around almost 100 fewer stations than its French counterpart.

The current London Plan adopted a design-led approach for densification and ties densification to transport accessibility.⁵¹ The draft London Plan is building on this by:

- Introducing numeric density ranges clearly set out on a map
- Designating large parts of the urban core as suitable for mid-rise development
- Preparing small sites guidance to facilitate incremental densification⁵²

⁵¹ Mayor of London (2021), [The London Plan 2021](#). Greater London Authority. [Accessed August 2026]

⁵² Mayor of London (2026), [Draft London Plan 2026](#). Greater London Authority. [Accessed August 2026]

Across the capital, there are numerous examples of recent high-density development near stations, such as:

Blackhorse Road, 17 minutes from Oxford Circus | 9.4km from city centre



Source: Google Maps

London's transit network effectively matches that of its French and Japanese peers, and so the biggest gains are to be made around existing stations. Bringing densities around them in line with those observed in Paris and Osaka could deliver over 1.1 million additional homes across the city, split evenly between urban core and outer suburbs.

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Appendix 1: The analytical approach and data used in this briefing

Mass transit stations

This research looks at how housing densities respond to proximity to ‘mass transit stations’ within urban areas. We include light and heavy rail stations, subway stations and tram stops, because these are the focus of Government density policies in the August 2026 National Planning Policy Framework.

Areas are considered near to stations if they are within an 800-metre radius – roughly equivalent to a 10-minute walk.

The analysis is conducted on the mass transit network as a whole and does not distinguish between stations with different levels of service at present or identify stations with more or less capacity to change levels of service.

Station locations

The locations of rail stations have been obtained from OpenStreetMap using the Overpass API. They have been cleaned such that locations with the same name in close proximity to each other have been merged. The resulting dataset has been cross-referenced with other station datasets, such as NaPTAN.

Housing density

This research uses Centre for Cities’ dataset which combines Census, administrative and satellite datasets to measure residential floorspace per hectare.⁵³ The dataset measures the density of the residential built-up area of each city, excluding areas like large parks and industrial areas from its calculations.^{54, 55}

⁵³ France and Japan were chosen as G7 countries with comparable country-level population density and data availability required for the analysis. For details on how we estimate residential density, see Appendix 8 of Lange M, Breach A & Kovacevic L (2025), [Flat Britain: The urban density gap and how to close it](#). Centre for Cities.

⁵⁴ This means the density measure focuses on questions related to the built-form of residential areas – how it differs between places and over time. Questions related to changing land-use or efficiency of occupancy of stock are relevant to questions of density, but outside the scope of this paper.

⁵⁵ Purpose-built Student Accommodation is missing from this data, as across all countries, only individual dwellings are counted in stock figures. This is likely to have a larger impact in British cities than in French and Japanese ones.

Connectivity

The focus on mass transit stations in this report is not because they are the only places higher densities should be expected or encouraged. Density should be expected to vary in accordance with connectivity to jobs and amenities, and connectivity is influenced by travel times by any mode of transport and the ease of switching transport mode.⁵⁶ Centre for Cities recommends that cities plan using holistic measures of active and public transport connectivity, such as provided by the Department for Transport's 2025 Connectivity Tool.⁵⁷

Cities analysed

This research focuses on Britain's largest cities and their peer cities. Small cities are not considered as they would not be expected to have high coverage by mass transit.

Cities are grouped and compared to their peers based on the number of people in their commuting area, using the OECD's Functional Urban Area (FUA) definition.⁵⁸ London is compared to Paris and Osaka. Big cities are defined as those with a FUA population between 0.9 and 3 million.⁵⁹

Urban core and outer suburbs

This research distinguishes between the urban core – the main residential built-up area of the city, and the outer suburbs. Centre for Cities has recently improved our methodology for calculating urban core thresholds, resulting in minor changes compared to earlier work on urban densities.⁶⁰

Urban core thresholds are as follows: London: 11.2km; Manchester, Birmingham, Glasgow, Liverpool: 5.2km; other big cities: 3.6km.

Outer suburbs extend to: London: 30km; Manchester, Birmingham, Glasgow, Liverpool: 14km; other cities: 10km.

56 Centre for Cities research has recently quantified the connectivity benefits to simply better integrating British public transport networks. See Johnson R (2025) [Integrated transport: The size of the prize for mayors](#). Centre for Cities

57 See Department for Transport (2025) [Connectivity Tool](#). This recommendation is also now policy in the 2026 National Planning Policy Framework.

58 Dijkstra L, Poelman H & Veneri P (2019), [The EU-OECD definition of a functional urban area](#). OECD Regional Development Working Papers 2019/11.

59 This definition of 'big city' is consistent with that used in our 'Flat Britain' report. Centre for Cities' standard definition of big cities based on Primary Urban Area population usually excludes Edinburgh and Cardiff.

60 Urban core thresholds are now derived from 2021 Census population living in the city's built-up area, compressed such that radius size increases by a smaller amount for every additional person added to the population, reflecting the expectation that density should increase with population size. For simplicity, five city-size groups are identified and cities within the group are given the same urban core threshold.

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Appendix 2: Detailed station density gap breakdown

Table 2: Station density gap broken down into urban core and outer suburbs

	Urban Core		Outer Suburbs	
	Density matched only	Density and transit coverage matched	Density matched only	Density and transit coverage matched
Manchester	134,000	148,000	129,000	129,000
Birmingham	111,000	168,000	100,000	113,000
Glasgow	183,000	183,000	140,000	140,000
Liverpool	77,000	133,000	65,000	65,000
Leeds	28,000	93,000	34,000	66,000
Sheffield	47,000	48,000	16,000	17,000
Newcastle	53,000	73,000	19,000	21,000
Nottingham	34,000	47,000	13,000	18,000
Bristol	13,000	26,000	5,000	25,000
Cardiff	20,000	32,000	8,000	8,000
Edinburgh	16,000	39,000	19,000	23,000
Big cities total	729,000	1,046,000	553,000	641,000
London	535,000	536,000	582,000	582,000
Big cities and London total	1,264,000	1,582,000	1,135,000	1,223,000



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