

Density: drivers, dividends and debates

Appendix

Interview quotations

Survey results

Case studies

Contemporary Density – Global and Regional Contexts



**Urban Land
Institute**

About ULI

The Urban Land Institute (ULI) is a non-profit research and education organisation supported by its members. Founded in Chicago in 1936, the institute now has over 34,000 members in 75 countries worldwide, representing the entire spectrum of land use and real estate development disciplines, working in private enterprise and public service.

ULI has been active in Europe since the early 1990s and today we have over 2,200 members across 27 different countries. We have a particularly strong presence in the major European real estate markets of UK, Germany, France and the Netherlands but are also active in emerging markets such as Turkey and Poland.

ULI's mission is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. We are committed to:

- Bringing together leaders from across the fields of real estate and land use policy to exchange best practices and serve community needs
- Fostering collaboration within and beyond ULI's membership through mentoring, dialogue, and problem solving
- Exploring issues of urbanisation, conservation, regeneration, land use, capital formation, and sustainable development
- Advancing land use policies and design practices that respect the uniqueness of both the built and natural environments
- Sharing knowledge through education, applied research, publishing, and electronic media
- Sustaining a diverse global network of local practice and advisory efforts that address current and future challenges

To download information on ULI reports, events and activities please visit <http://europe.uli.org>



Copyright ©2015 by ULI – Urban Land Institute.

ULI Europe, all rights reserved. No part of this report may be reproduced in any form or by any means, electronic or mechanical, including photocopying or recording, or by any information storage and retrieval system, without written permission of the publisher. ULI have sought copyright permission for all images and tables.

Urban Land Institute

50 Liverpool Street
London
EC2M 7PY
United Kingdom

Tel: +44 (0)20 7487 9570
Email: ulieurope@uli.org
Web: www.europe.uli.org

Appendix one

Interview quotations

Leading thinkers



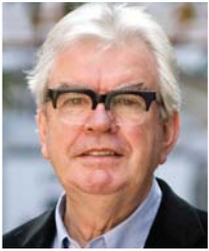
Prof Ricky Burdett, Professor of Urban Studies, Director, LSE Cities and Urban Age, London School of Economics and Political Science

- Density is a means to achieving environmental and social equity in cities: it can deliver an ecological footprint which is kinder on the planet and create more interconnected and mixed environments with the potential greater social cohesion. As a planning instrument, density must be fully integrated with intelligent public transport and land use policies.
- Dealing with existing cities is more relevant than designing new ones, given the fact that the vast majority of urban dwellers live or move to established urban centres. Optimising density and to retrofit existing cities is a win-win situation.
- Global flows of capital, people and information favour investment in higher density development which benefit from thick connectivity and the co-presence of people, markets and technology.
- There is no such thing as a 'generic city'; therefore there is no such thing as 'generic density'. City form is a reflection of different cultures, political belief systems and ecologies. Understanding the specifics of density requires more than a spreadsheet or matrix; it is a qualitative concept as well as a quantitative measure.
- The success of living at higher densities is deeply rooted in cultural and socio-economic factors. High density living in London, for example, is offset by access to open space, parks or weekend retreats (for the more affluent). High density living in Hong Kong reflects the premium paid to be close to jobs and places of transaction.
- When given a choice, people make trade-offs between higher density and access to jobs and services like schools, hospitals and leisure facilities. Overcrowding within residential units affects attitudes towards neighbourhood density.
- Density, urban typology and social inequality are closely connected. Locating people from deprived backgrounds of similar ethnic origins and belief systems in poorly connected high density neighbourhoods with a relentless building form— as in Paris banlieu- can exacerbate social tensions and greater inequality within cities.



Prof. Peter Newman AO, AO, John Curtin Distinguished Professor of Sustainability, Director DSD Curtin University Sustainability Policy Institute

- We have come to the end of the development of the car dependent city as people now realise that this city is unliveable.
- Density requires amenity and that amenity is public transport. Doing density at any scale requires infrastructure investment. Density as a model requires public investment as much as private investment.
- The knowledge economy is not happening in suburban shopping centres. The consumption economy is suburban, the knowledge economy is urban.
- There are three types of 'city' observable in the cities of today. These are 'walking cities', 'transit cities', and 'automobile cities'. Each has its own features. The walking and transit cities are growing and attracting population. The challenge for the next two decades is what to do with the automobile based city that is no longer viable or attractive.



Sir Terry Farrell, British Architect and Urban Designer, Farrells

- Density is complex. Everything points to greater density, but it is often called something else: growth, infrastructure, migration, population discussion are all about density. There are increasing expectations that the city will become more dense.
- Technology and communications are active drivers of density. They make greater interaction and connection more possible and more necessary. Fear of not being connected is an important concern and this fear is addressed by density, and the interaction that it brings.
- City-making in the 21st century has become the human race's biggest endeavour ever.
- There is an innate fear of density, fear of the crowd, fear of other humans and what they might do goes back a long way in the human psyche to the hunter gatherers. The most dangerous animal that you might meet in the forest was another human. But humans today have become more claustrophobic than agoraphobic; there is a love/hate relationship with the crowd. We now know that our best life chances involve interaction and collaboration with others, but we also yearn for our simple privacy. We are learning to become a sharing society.
- As the world get more urban and more dense human societies learn how to change and adapt. The societies that adapt to density fastest and most effectively will have an advantage. People in China have quickly become used to less personal space and to bumping into each other. They have adjusted quickly to density.
- Greater density and better adaptation to density can be actively facilitated and encouraged through advocacy and demonstration. City leaders are really the key urban planners and designer of cities and they tend to focus on the whole city. The chief urban designer of any city should be the mayor.
- To promote density we need to work at the level of larger districts and whole cities where we can combine parks and public space, with walkability and schools, infrastructure, facilities and buildings. It cannot be done well at the level of individual sites.

Industry experts



Michael Spies, Senior Managing Director, Europe and India; Chair of Investment Committee London, Tishman Speyer.

- Capital does not drive density. Cities that grow attract capital, and densified growth in well run cities also suits the preferences of large scale capital investors. There is a positive synergy for the investor in buildings reflecting high calibre density in mixed-use environments.
- Cities need great streets, but much of what happens in streets can also be achieved at transport interchanges as well as vertically within buildings.
- It is difficult to plan effectively for growth in a democracy which prioritises current preferences over future needs. Political process is always more attuned to those who have been here, versus those who would like to be, or those who have not yet arrived.
- The densified city will produce a more liveable and sustainable reality that addresses the polarisation of income by providing shared amenities and spaces between people. Densification is the physical manifestation of the sharing economy.



Rosemary Feenan, Director of Global Research, JLL, and Chair, ULI Europe Policy & Practice

- The efficient, effective and responsible use of land is a goal that would be a win-win for all cities, their businesses and their citizens. The key question though is how cities can achieve this while having to quickly absorb the significant increases in population that are flowing from continuing rapid urbanisation. Densification may be an obvious answer, but how to define, deliver and service successful densification remains one of the most important challenges in urban planning and design. 'Good' density will mark out the next generation of winning cities.



Andy Martin, Senior Partner, Strutt & Parker

- Good density is mixed use, transport enabled, integrally designed, well serviced. We are learning now that we need to have a real diversity of skill sets within master-planning teams, including people who can look at the anthropological and community issues that are at the heart of density. We can't rely on traditional development teams alone to come up with the all the right answers.
- Capital facilitates ambition and aspiration in cities, it does not drive density but enables it. In the past capital sometimes got it wrong and invested in dense projects that failed before they came good due to poor planning, lack of infrastructure and facilities. Today, capital is not so stupid.
- The ability to build tall is really about the ability to persuade an authority in a mature planning environment that this is the right thing to do.
- To achieve successful density you have to plan the environment around buildings. You have to have culture, places to eat and drink, and all the other trappings of modern life, you have to have infrastructure and access. It's a mix of all of those things that make density successful.



Patrick Kanters, Managing Director Global Real Estate & Infrastructure, APG Asset Management

- Successful cities become more dense. Density corresponds with demographics and growth, but it must be underpinned by infrastructure investment and requires well designed lively public spaces.
- Sustainability is an important driver of density. Densification and more intense use of land produces buildings and infrastructure that are more energy efficient. Ultimately sustainable and denser buildings and cities will provide a premium return and can be more affordable because of lower use of energy and resources.
- There is a concentration of investment in the larger growing cities and this encourages and facilitates densification. But investment need not be concentrated in large cities alone. There is a role for well connected medium cities that can provide affordability and quality of life.



Brian Moran, Senior Managing Director, Hines

-
- The key combination is density with place-making and infrastructure. If you have both you get a really successful city like London. If you have density without place-making you get a different kind of city. So the skills of place-making are critical, but in general city governments don't understand how to commission it.
 - Governments are afraid of density because they know it can provoke a reaction.
 - The best thing with architects is to motivate them through competition. Density provides an amazing platform for architects' work.
 - It is critical to engage communities when doing major redevelopment. There is a real confusion in most peoples' minds about what density is— they think of high rise, but Paris and Barcelona are high density without being high rise. Those cities have high quality street life, and second to none shopping experiences – this is a product of their density.
 - Old tower blocks can work as mixed income locations as long as high quality amenities and public space are put in. But you have to educate local authorities that this can work.



Olivier Piani, Chairman of the Executive Committee of Allianz Real Estate and Chief Executive Officer (CEO) of Allianz Real Estate

-
- In a world of continuing artificially low interest rates, bonds and equities have limited appeal to investors. So a huge amount of money is being deployed into real estate, and this capital tends to buy bigger and bigger assets. The demand for these new large buildings is a key driver of urban density.
 - Density is most intense an issue in the 10-20m people cities, those cities which are rapidly growing.
 - Architectural input into place making is becoming more and more important – people are moving from feeling that a place to live is purely a necessity, to wanting to like the place they live in.



Mark Cover, Senior Managing Director, CEO - Southwest Region, Hines - Houston

-
- Many cities in Southwest America have started with low density but are now growing and densifying. Time spent in the car, one of the costs of sprawl, is a major drawback that people are increasingly rejecting.
 - The key goal is to have density and retain authenticity: that means respecting the historic character, the natural environment, and the street life.
 - In the emerging markets, as well as developed markets, the risk is that density tends to benefit the rich or the poor it does not bode well for the middle class.
 - What happens to the suburban areas that do not move toward quality nodes remains an open question.
 - Fostering forward looking leadership skills in the public sector will be key in respect of where growth will occur.



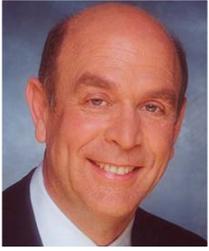
Chris Frampton, Managing Partner, East West Partners

- The growth of population has led to densification [in Denver] and what is most dramatic is the pace of change. Some people do not like change. But many people now want density and urbanity, they want the opportunities, services, and buzz that it brings.
- Capital markets reward density with large scale investments. They like the scale and the pace of dense projects. They can exit sooner. The availability of large pools of capital that seek large, unified, and faster investment projects incentivises and stimulates density.
- Robotics and automated transport will also facilitate greater density.



Gordon Ongley, Director, Development, Swire Properties

- In Hong Kong people value convenience above all else. There is a contradiction in the fact that we have been convinced that we should spread ourselves out, when in fact density is the most convenient model for an urban lifestyle.
- In Hong Kong living on the 45th storey is not considered unusual. The concept of high rise living being bad just doesn't apply here. What is wrong with a 30 or 40 storey building if the infrastructure can cope?
- The sheer topography of Hong Kong gives it the ability to have high density living with the escape valves that any city needs within 15 minutes of where you live and work.
- Mixed use was the key feature of the evolution of density in Hong Kong with a flexible building code that combined commercial with residential space.
- We have examples of good and bad density [in Hong Kong]. Pacific Place is a community which is integrated with its surroundings: it is connected directly to the mass transit system, it has a sense of openness, there are gardens immediately adjacent to it and spaces within it. It feels friendly to human beings, it has a clear front door. In podium buildings on the other hand, if you arrive at street level, you only see entrances into car parks, fire escapes, the transformer room doors. It is inward looking and fortress like. There is no street life.
- Hong Kong has become much more politically sensitive to all kinds of development and environmental issues in recent years and it sometimes appears - rightly or wrongly - that it is easier to employ an engineering consultant to reclaim seabed to create 'new land' rather than take on the more difficult task of optimising existing land resources. There is clearly scope for reclamation in some areas, but there is no one solution that can solve a problem of a city like Hong Kong that is bursting at the seams.



Richard Baron, Chairman and CEO, McCormack Baron Salazar

- It is very important to appreciate differences between income groups when talking about density. Different forms of density suit different social groups. High rise for example is not particularly suited to families and children. And [in the US], the cost of constructing anything above four storeys means that medium and high rise rents are beyond the reach of lower income groups.
- Keeping up with processes of gentrification in cities like New York and San Francisco is a very real challenge for municipal government.
- In the US, high rise does not appear to be a means of achieving vibrant mixed income neighbourhoods. The rents involved are way beyond the means of lower income groups. But lower rise brownfield redevelopment, and in particular the infilling of abandoned and vacant land, can be an important tool in creating affordable housing.
- Rebuilding communities in areas which have been abandoned and blighted requires social programmes as well as provision of housing units.
- Traditionally working class urban neighbourhoods, like the Tenderloin District in San Francisco, have become a magnet for higher income people and are under enormous pressure to densify. This is a real issue for lower income groups who are at threat of being displaced. There is enormous resistance to this gentrification in places like San Francisco.



Benjamin Lesser, Development Manager, Derwent London

- High density is good density. It is all to do with quality: design quality (at macro and micro scales) yes, but even things like air quality too. Cities need to deal with air pollution and sustainable transportation.
- Good high density also has a mix of different uses – it comprises workplace (office) and retail, leisure/culture/entertainment and education and transport and public space. It is a place where events happen, which has a day time and a night time economy.
- Employers who are looking to hire the best people will always follow the talent. An out of town business park isn't going to attract the best talent today. People want to be in lively and vibrant places, both at work and after work. This drives an intensification of urban centres.
- In the future more flexible working environments are going to become a more commonplace requirement, even for the most traditional of occupiers. People want to work in an inspiring and invigorating environment, they want a less stuffy way of working – less compartmentalised in space and time. The mentality of society has changed, and this runs through into urbanism, architecture and office space, into public space and the city. The whole city is changing and people will want to be in those most vibrant parts of it.



Phil Hughes, President of Hughes Investment and Hughes Commercial Real Estate

- I see two types of density: existing density where we can re-purpose older cities and towns that have good bones (density and infrastructure) which are currently under used, and developed density where we can take something that is lower density but well designed (such as a suburban business park) and increase its density by adding additional dimensions and capacity.
- Density and walkability go together. In the denser locations you have culture, leisure, libraries, street life, and the outdoors life style. Many more people want that kind of opportunity.
- Older people and younger people like density. The only people who are against density are adults with school age children. But if we can improve schools and perceptions of safety and crime they too may become pro-density.
- People hate two things most: first they hate sprawl, then they hate density. Leadership is needed to show that density can be liveable. Local politicians need to take a lead on density. Artificial growth controls are not the answer.

Senior Planners



Paul Lecroart, Senior Urban Planner, Paris Region

- It is not just urban population growth that is driving the need for denser cities and urban districts, but the need to reduce the footprint and improve resilience of cities.
- In the French Planning Law, the land is considered as the common heritage of the nation that governments must use wisely and carefully.
- In France there has been the major problem of de-densification and sprawl. This is seen to create environmental damage and to be car dependent and anti-social.
- It is not easy to see density. Some places appear less dense than they really are. People recognise quality much more clearly than density. That is the opportunity. Perceptions of urban quality really matter.
- Who is density for? Density should not be just for the rich or a requirement for the poor. Density should be used to promote mixed income areas, and social diversity.
- The question is not so much about density, than about densification and where it takes places. We really need to aim for the right density in the right place. Of course, good public transport service is one on the keys to densification, but it is not the only one. Densification has to go with intensifying services, public spaces, green, opportunities.
- Densification should not reduce the quality of life of people, destroy heritage or landscape. Densification has to be contextual and remain 'reasonable' in relation to the environment.



Dr Karima Nigmatulina, Executive Director, Master Planning Institute, Moscow

- Most people do not understand that in certain situations density can be a wonderful thing. The concepts of density meaning proximity and convenience are not understood at all. Most people identify density with cramped spaces, a lack of greenery, and inconvenience. Education would be very helpful.
- When we think about density it is interesting that we can be talking about it at different scales. We can think about it at the level of an agglomeration, or at the level of a housing block. It could be really beneficial to clarify what we mean by density in different types of settings at different scales. Identifying a common language or system for measuring density would also enable us to compare like with like.
- Mono-usage is problematic in high density. Examples from Soviet times have taught us this.
- In Moscow City [a large 60ha mixed use high rise development] the space between the buildings is not comfortable because it is not at a human scale. This has spoilt the way people think about high rise in Russia.
- It takes skill to realise density in a comfortable way.



KK Ling, Director of Planning, Hong Kong Government

- By the late 1970s and early 1980s the world seemed convinced of the merits of high density development as against urban sprawl in the form of sub-urbanisation. Hong Kong made an important contribution to this debate - showing that high density urban development could be successful with proper planning and efficient urban management. I am surprised that the density debate is still continuing!
- Hong Kong has no choice but to adopt a compact urban form with high density development. It is indeed a sustainable urban development model. However, good density in cities must be coupled with high quality urban planning and urban design, and be developed in a mixed use model.
- Hong Kong's high density urban development has been well integrated with public transport facilities. In our current planning schemes for new town extension, we managed to locate 80% of the population within the walkable 500m radius of a railway station or a public transport interchange. Such a pattern is most environmentally friendly as it encourages the use of public transport and reduces dependency on private cars.
- High density urban development is also very effective in providing community services to the people. For example, the ageing populations can be better served when they are relatively concentrated within cities than spread in the sub-urban neighbourhoods.
- The biggest challenge to Hong Kong now is how to sustain and even enhance the level of liveability within a high density environment. For example, we need to plan very carefully the public space between buildings to make the streets vibrant and lively. To mitigate the sense of a congested living environment, the provision of public open space is very important. In Hong Kong, about 90% of our population is within 400 m of public parks.
- It is crucial to consider human comfort in high density development plans. In Hong Kong, the subtropical climate makes the urban heat island effect very pronounced. We have developed planning tools, such as air ventilation assessments and sustainable building design guidelines, which are very important in dealing with this.



Khoo Teng Chye, Executive Director, Centre for Liveable Cities, Singapore

- In Singapore we realise that, in order to accommodate future growth, you have to take a very long term view of planning – looking 40 or 50 years ahead or more. And you can't just look at housing or transport or green space in isolation, you have to take an integrated approach. This long term, integrated approach coupled with dynamic urban governance has been responsible in a broad way for how we were able to make density work.
- Overall I would say good density is about trying to achieve balanced development – achieving a good economic outcome building a competitive economy, making sure that people have a decent quality of life, good homes, and maintaining a sustainable environment. It is about trying to achieve these liveability outcomes.
- We haven't got a choice. We have to live with density, because Singapore is continuing to grow despite our fundamental land scarcity. It's really not a choice.
- Our challenge today [in Singapore] is to distil the lessons of what we did right and what we did wrong in the past, and to continue to do the right thing applying these lessons moving forward.



Dr Zenja Antalovsky, Executive Director, Urban Forum, Vienna

- You get a greater acceptance for density if you involve people in the planning and development process. People are more likely to identify emotionally with density if they have been educated to fully understand its benefits and could co-create their neighbourhood.
- City planners need to change from thinking within the borders of the city itself, to the scale of the wider metropolitan region. From this perspective, different parts of the metropolitan area could be densified in a polycentric pattern and with varying intensity.
- Successful density needs a good mixture of uses, architecture and urban design. People will no longer accept a monoculture.
- Planners and architects often seem to neglect to think about how life works in the wider city – about the street life, about peoples' daily routines and how they feel and perceive the correspondence between public space and density. In Austria certainly, some lack of these emphatic skills.



Lisette van Doorn, CEO, ULI Europe

- More than anything we need a renewed focus on demonstration projects, public education and the training of development and investment professionals associated with density. It is clear that density is, in most cases, the best way to accommodate economic change and population growth providing the optimal returns for society and environment whilst also creating value that can be captured and shared, and making our cities more flexible. But the world does not yet know how important densification is or how it can best be achieved. Therefore we must commit ourselves to meeting this gap in knowledge and skills and to a new generation of advocacy, education, and inspiration about density.