

C A G E

Background Brief

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A Scorecard for the Seven New Towns

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Introduction

The UK government has committed to building at least 1.5 million homes over the next five years. As part of this effort, it has established a [New Towns Taskforce](#) to identify potential locations for large-scale development. This process has recently been narrowed down to [seven proposed sites](#).

The logic is straightforward: build homes at scale in places where large volumes can be delivered, supplement them with infrastructure, such as new railway lines, and people, along with local amenities, will follow. In practice, however, the success of new towns depends critically on pre-existing demand for housing in the area. That demand is driven by underlying economic fundamentals—most importantly access to jobs, as well as services and amenities. Housing supply does not automatically generate demand. Our analysis of 3,200 new-build developments provides causal evidence of this (Datta and Kulka, 2025). Instead, the viability of new towns hinges on connectivity to jobs, infrastructure, and both public and private amenities. Where such demand is weak, housing delivery is significantly slower, because the market cannot absorb new homes at the pace required, increasing the risk of stalled or incomplete developments.

This creates a central tension. New towns are often located where land is available, not where demand and connectivity is strongest, and are reliant on new infrastructure provision, which can face delays.

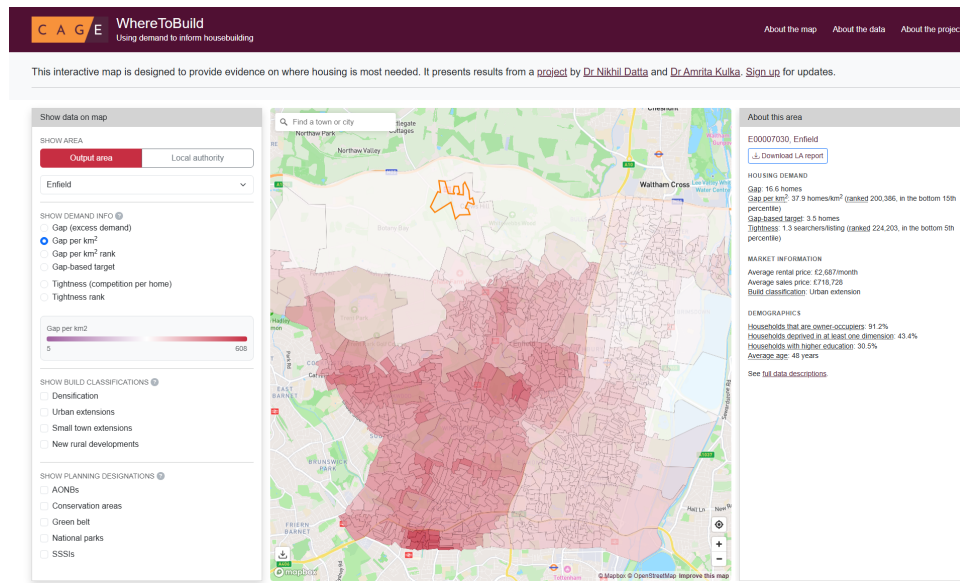
The development of new towns involves a complex coordination problem between housing developers, infrastructure providers, and amenity suppliers. Homes require adequate transport links—both private and public—as well as access to public services like schools and healthcare, and private amenities including shops, restaurants, and other local services to be attractive. Yet many of these services only arrive once a critical mass of residents is in place. Private amenity providers require sufficient local demand to operate profitably, while public services typically require a sufficiently large population to justify provision.

The result is that new towns can take many years to become self-sustaining—if they do so at all. Early phases may be characterised by limited amenities, long commutes, and weak local demand. In contrast, locations with strong pre-existing connectivity face fewer such frictions, as residents can access jobs and services elsewhere from the outset. Recent examples highlight these challenges. Developments such as [Northstowe](#) have seen residents move in before basic services and infrastructure were in place. The project was also delayed for several years due to infrastructure setbacks. Others, such as [Ebbsfleet Valley](#) have taken decades to deliver less than 10% of the [originally proposed homes](#), and has still only built approximately 5,000 of the 15,000 home target announced by George Osbourne in 2014.

The seven proposed towns do take past lessons and economic fundamentals into account, and on paper appear well-justified; however, a closer look at granular data on direct excess demand measures, as well as their proxies, reveals a more nuanced picture. This brief evaluates the seven proposed new towns based on their current economic fundamentals, similar nearby completed developments, as well as their prospects conditional on planned infrastructure being successful. We assess each location using measures of excess housing demand,

access to jobs, availability of amenities, and connectivity. At the start of each proposed town we give statistics on the average rank of the area compared to the rest of England (rounded to the 5th percentile), as it currently stands, for excess housing demand, job access and local amenities. Our analysis draws on the [WhereToBuild tool](#) (see also Figure 1), which harnesses granular spatial data on housing demand and supply to define the housing gap—a measure of excess demand for housing at the hyper-local level. We combine this with data on employment access via both public and private transport, as well precise locations of amenities such as shops, restaurants, local services, leisure and recreation, schools and healthcare across England.¹

Figure 1: The WhereToBuild tool: <https://wheretobuild.warwick.ac.uk/>



Results

Leeds South Bank, West Yorkshire: 10/10

Excess housing demand: Top 10%
 Job access: Top 15%
 Local amenities: Top 10%

Leeds South Bank presents a strong case. Much of the proposed development area lies within the top decile of excess housing demand in England.

The Leeds South Bank area offers extensive access to jobs and amenities, with employment accessibility 12 to 15 times higher than it is for the national median home via public transport. Future residents will benefit from a high existing density and diversity of retail, hospitality, and recreational facilities, and the increased population will likely encourage further businesses. The area also has strong access to healthcare and education.

[Planned investments](#), including upgrades to Leeds Station and the West Yorkshire Mass Transit system, will further enhance connectivity, if and when provided. However, it is worth noting that the area is already highly connected. This reduces the risk of coordination failures and supports rapid build-out.

¹For information on this data construction please see Datta & Kulka, 2025.

Manchester Victoria North, Greater Manchester: 10/10

Excess housing demand: Top 20%

Job access: Top 5%

Local amenities: Top 10%

The proposed new development in Victoria North stands out as one of the strongest candidates along with Leeds South Bank. The proposed areas on average fall within the top quintile or higher of excess housing demand in England, with many parts in the top ten percent of all of England, reflecting strong underlying pressure for more housing.

Connectivity to local amenities and jobs is exceptional due to its central inner-Manchester location. Employment access is between 15 and 16 times higher than access for the national median house, and residents have access to thousands of consumption amenities, including retail, dining, and leisure options. Access to healthcare and education is also strong.

The site benefits from substantial existing infrastructure. Planned improvements such as the proposed [Metrolink extension to Sandhills](#), when built, will help mitigate congestion. Much like Leeds, the key strength however, is that the area is already well-integrated into a thriving urban economy.

Brabazon and the West Innovation Arc, South Gloucestershire: 7/10

Excess housing demand: Top 35%

Job access: Top 40%

Local amenities: Bottom 45%

The proposed developments around Bristol benefit from proximity to one of the UK's most dynamic urban economies. Though the overall average is lower, many of the proposed sites (particularly those that are urban extensions of Bristol) fall within the top 10% of areas in terms of excess housing demand. Connectivity is generally strong, particularly via private transport, and access to employment is well above that of the median home in England. Some parts of the proposed area currently have lower amenity density and weaker demand which pulls down the average scores. Given the general attractiveness of the area however, it is likely that these places will benefit from growth in nearby areas and amenity spillovers, strengthening demand for housing.

Future improvements, such as the proposed [Henbury station](#) and broader transport investments, when built, can further enhance connectivity. Overall, the strategy for the Brabazon and West Innovation Arc new town appears to rely on extending an already successful urban area rather than creating a new standalone settlement, which reduces risk.

Milton Keynes, Buckinghamshire: 7/10

Excess housing demand: Top 45%

Job access: Top 40%

Local amenities: Bottom 45%

The new development in Milton Keynes represents a case of incremental densification of an economically well-connected area. Housing demand is above England's median everywhere, and in the top 30% for parts of the proposed areas.

Access to jobs is solid—around four to five times the national median via public transport and roughly twice the median via private transport. Access to amenities is reasonable though less extensive than in larger cities such as Manchester and Leeds (i.e. 100s of establishments instead of 1000s of establishments within a 5 minute car journey or 15 minute public transport journey). There is high variance in amenity access across the proposed area, with some parts in the top 20% of the country, while others are considerably worse, which brings down the average. Healthcare and education access are both good.

The size of future gains depends partially on the East-West Rail project, which could significantly improve connectivity. While not a high-demand hotspot, Milton Keynes offers a relatively low-risk environment for expansion. If all new builds in the UK were targeted towards similar areas, that would amount to a good planning strategy.

Thamesmead, Greenwich: 4/10

Excess housing demand: Bottom 35%

Job access: Top 40%

Local amenities: Top 45%

Thamesmead presents a mixed picture. Despite its location in London, the area generally falls below the 60th percentile for excess housing demand for England.

Access to amenities and jobs is good compared to the country overall, though weaker than in other parts of London and dense urban areas like Manchester, Leeds, or Bristol (including the areas in these cities proposed for new town locations). However, the location sits in the middle of three very local disamenities which our research has shown can heavily dampen demand for housing—the City of London airport, a sewage treatment facility and Belmarsh Prison. A further sewage treatment facility sits within 3km on the fourth side. Additionally, the location looks to sit directly within [the flight path](#) for the airport and would sit only 2 km away from the runway .

Planned improvements, such as the proposed DLR extension, could enhance connectivity and support regeneration. However, the area’s prospects depend heavily on successful infrastructure delivery and some degree of regeneration to attract future residents and compensate them for the existing negative amenities.

Crews Hill and Chase Park, Enfield: 3/10

Excess housing demand: Bottom 20%

Job access: Bottom 45%

Local amenities: Bottom 45%

In our assessment, Crews Hill in Enfield is one of the weakest of the proposed sites. From the point of view of excess demand for housing, the identified areas fall into the bottom fifth of excess housing demand in England. [Figure 1](#) shows some example details on this from the WhereToBuild mapping tool.

Access to amenities is limited near Crews Hill and Chase Park, and employment accessibility via public transport is below the national median within a 25-minute commute. It is worth pointing out though, that comparisons to the national median may understate accessibility in a London context where workers typically commute far longer. In addition, neighbouring areas with similar characteristics that are more developed also exhibit low demand, providing an indication of what the future may look like for a new town in Crews Hill and Chase Park.

Finally, the proposal involves building on Green Belt land. In our [recent report](#), we show that allowing development on Green Belt land can unlock areas for residential building where excess demand is high. However,

the Green Belt around Crews Hill exhibits some of the lowest levels of excess demand in England. Given the contentious nature of Green Belt development, it seems difficult to justify expending political capital in areas where demand pressures are relatively weak. One caveat to the above, however, is that the [Enfield Chase Landscape Recovery project](#) has the potential to generate accessible, high-quality green space, which may carry substantial amenity value, and partially provide mitigation for building on green belt land for the development.

Tempsford, Bedfordshire: 2/10

Excess housing demand: Bottom 10%

Job access: Bottom 20%

Local amenities: Bottom 25%

Tempsford currently scores poorly on nearly all metrics that we consider in this analysis. The proposed site lies in the bottom 10% of areas in England in terms of excess housing demand. Current access to jobs and amenities is extremely limited. The area has access to just 3% as many jobs as the median home in England by private transport, and almost none by public transport. Local amenities and services are sparse.

As such, the case for development rests entirely on the proposed East-West Rail project, which could significantly improve connectivity. However, timelines for this project remain uncertain, and delivery is not guaranteed. Overall, this location represents a high-risk bet with likely minimal short-term contribution to housing targets. However, should the East-West Rail project reach a more advanced stage with credible delivery timelines, the site could represent a more viable development opportunity.

Conclusion

The government's new town strategy is one part of its efforts to address the UK's housing shortage through large-scale development. However, the success of such projects depends less on the quantity of housing built and more on where it is built.

Our analysis highlights stark differences across the proposed sites. Proposed locations in Manchester and Leeds benefit from strong existing demand and connectivity, making them well-positioned for rapid and successful development. Others, particularly Tempsford and Enfield, face significant structural challenges that may limit their viability.

References

Datta, N. and Kulka, A. (2025) 'Solving Britain's Housing Crisis: Where and How to Build 1.5 Million Homes'. SSRN Working Paper. Available at: https://papers.ssrn.com/sol3/papers.cfm?abstract_id=5832902.