

# The PLANNING CONSULTANCY SURVEY 2013

With expectations of 17 per cent growth, the residential development sector is leading a strong revival in the market. Catherine Early reports

Planning consultants are in a buoyant mood. Phrases such as “sustained growth in the market”, “very positive” and “significant step-up in the market” pepper interviews with senior industry figures and mark a retreat from negative sentiments of recent years.

The main sector cheering consultants is residential. The overall planning consultancy market value of residential development from the 81 firms who provided breakdowns of fee income has increased to £54 million in the year to 31 March 2013, up from £46 million the previous year. So confident are planning consultants that they are predicting an average growth of 17 per cent for planning work in the residential sector in the year to March 2014. Reported growth in this sector over the past year has been 15 per cent – double the expectations expressed in last year’s survey.

All consultants interviewed by *Planning* reported a surge in activity in residential development. “It’s a mix of factors: increased demand for housing, better economic conditions and availability of finance,” says James Fennell, managing director at Nathaniel Lichfield & Partners.

David Bainbridge, partner at Bidwells,

reports that residential or residential-led mixed-use schemes were the strongest areas of performance for the firm. “The demand for housing has to be met largely by greenfield sites coming forward for development,” he says.

David Lock Associates is also very busy, says managing director Lawrence Revill, especially in its specialist area of large-scale masterplanning and regeneration and urban extensions. “I don’t think we’ve ever made as many big applications as we have this year,” he says.

Most commentators point to the South and South East as the busiest locations for residential development, though high-value areas such as Cheshire and parts of the South West are also providing lots of activity.

Improvements in the economy and government schemes such as Help to Buy are behind a lot of the improvement, consultants believe. Roger Hepher, head of planning at Savills, cites the return of entrepreneurs who specialise in bringing forward smaller or more complex sites as a catalyst. “They are quite important in lubricating the system,” he says.

But all point to the National Planning Policy Framework (NPPF), now 18 months into implementation, as having had a major effect on the increase

## ABOUT THE SURVEY

The Planning Consultancy Survey 2013 was conducted during September by Planning’s sister company DCS. Consultants were invited to respond via an online survey or by returning a paper questionnaire. Questions covered staffing and fee levels, estimates of growth or decline in key market sectors and views on a set of current practice issues. The survey received responses from a record 276 practices, 66 more than last year, employing 2,134 chartered town planners.

in residential planning applications. Simon Neate, chairman of Indigo Planning, believes that the NPPF has made the policy framework for housing much clearer. “Local authorities know they have to get their act together on housing,” he says. “Some are still a bit resistant, but they don’t have as many options to kick schemes into the long grass. They’re likely to get appeal decisions against them.”

Bainbridge says: “The NPPF has been positive, particularly the presumption in favour of sustainable development and the need for a five-year supply of housing.”

Jane Hirst, managing director of Boyer

Planning, reports that the firm has been significantly busier this year, citing the NPPF as a key reason. “We are managing many residential projects, both bringing forward planning applications and development plan work, with the emphasis moving towards the former as five-year supply requirements in the NPPF allow an effective means of bypassing the development plan process.”

Indeed, consultants are positive about the impact of the NPPF across the spectrum of planning work, with 70 per cent believing that the policy makes it easier to secure permission for schemes that lack support from the local planning authority.

Hepher also believes that the NPPF has encouraged councils to take a more positive approach. “You don’t change perceptions overnight, but it has had some effect in changing planning authorities’ behaviour as they are more inclined to recognise the importance of a development’s economic benefits.” This is helped by the fact that the Planning Inspectorate has clearly supported the NPPF in decisions, he adds.

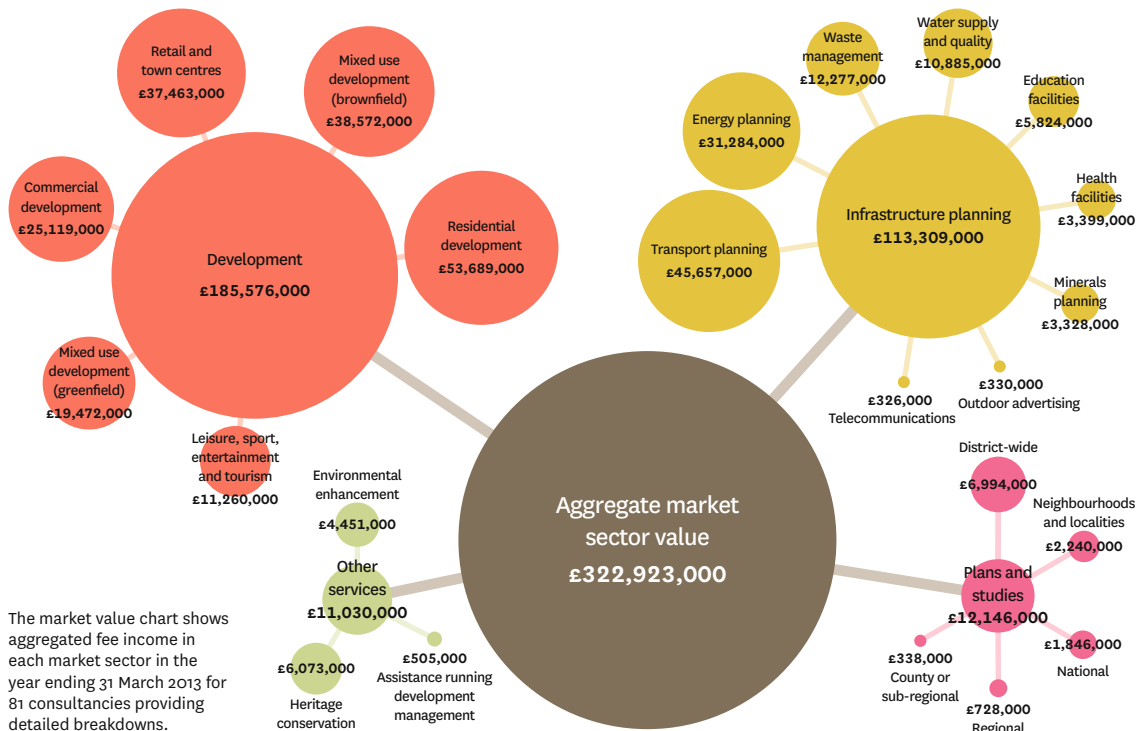
Another sector seeing plenty of growth is energy, where the planning consultancy market value, according to the 81 firms providing data, rose from £29 million last year to £31 million in this year’s survey. The mood remains positive, with the average prediction for growth in the year to March 2014...

“I don’t think we’ve ever made as many applications as we have this year”

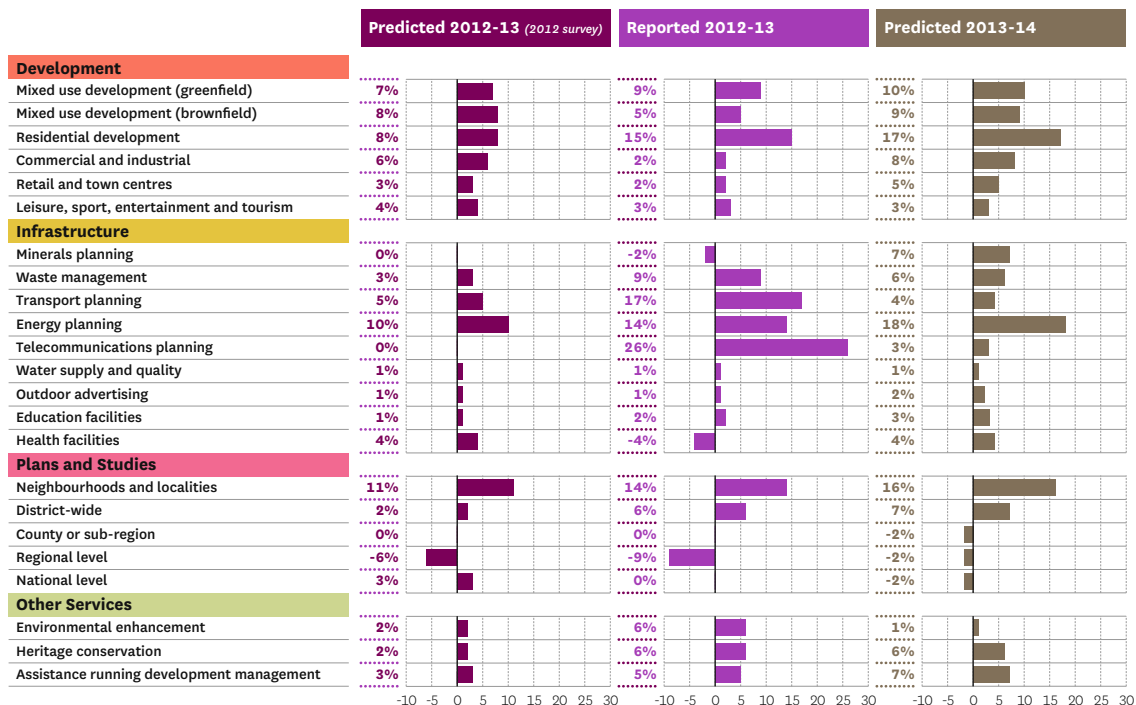
Lawrence Revill, David Lock Associates

## The state of the sector

### MARKET VALUE OF THE VARIOUS PLANNING SECTORS 2012/13



### CHANGES IN VALUE OF PLANNING FEE INCOME BY MARKET SECTOR 2012-14



offered by consultants being 18 per cent. Hepher says: "I think the energy industry is active generally, in part because energy companies know that we need to build infrastructure so we don't have an energy deficit."

Savills' energy planning team wins a lot of work through the firm's related energy activities, Hepher believes. It manages large amounts of rural land for landowners and buys and sells energy assets on their behalf.

There is also an increasingly broad range of energy projects for consultants to get their teeth into. David Sandbrook, head of planning at SLR Consulting, reports that solar projects and work on the exploration of shale gas resources are adding to its work on wind schemes.

However, some areas of activity are still flat. The market value of planning consultancy in retail and town centres has grown only slightly from £36 million in last year's survey to £37 million this year.

Work here has focused on change of use rather than building new space, say both Hepher and Neate. Retailers have sought to extend the range of products they sell. "Often they have conditions that don't allow that, but local authorities can be pragmatic in the interest of creating jobs," Hepher says.

NLP's Fennell has experienced a rise in restaurant-related work, much of it from shopping-centre owners wanting to give people a reason to visit in the face of the rise of internet shopping. "It's a defensive driver," he says.

Changing social trends in shopping have increased work in other areas. Savills has been busy with warehousing and distribution work to service internet shopping and home deliveries, according to Hepher.

Consultants are confident that the market will continue in a positive vein. The proportion of survey respondents who believe the economic climate for development will improve over the next 12 months has risen from less than a quarter in our survey in 2011 to 46 per cent in 2012 and 89 per cent in 2013.

Only nine per cent of 168 responses expressed uncertainty over prospects for the year ahead. The proportion of sceptics shrank from 31 per cent in 2011 to 16 per cent last year and just two per cent this year.

Indigo's Neate sums up the prevailing mood: "We're all enjoying a sense of coming out of the woods." **P**

*More  
work all  
round*

Consultancies are increasingly keen to boost their numbers of planning staff, but competition for talent is high. Susie Sell reports

**LEADING EMPLOYERS OF CHARTERED TOWN PLANNERS 2013**

RANK 2013	RANK 2012	COMPANY	CHARTERED PLANNERS 2013	CHARTERED PLANNERS 2012	DIRECTORS OR PARTNERS	ASSOCIATES OR EQUIVALENT	WOMEN PLANNERS	NON-CORPORATE RTPI MEMBERS	RTPI STUDENT OR LICENTIATES	FEE EARNERS	TOTAL STAFF EMPLOYED	PLANNING FEE INCOME 2012/2013
1	1	Barton Willmore	166	146	42	40	64	1	23	231	285	£21,800,000
2	3	Turley Associates	120	97	42	35	44	13	14	142	181	£19,200,000
3	2	Savills	115	109	36	52	30	19	19	153	177	£19,000,000
4	5	Nathaniel Lichfield & Partners	92	95	20	44	43		35	134	167	£13,500,000
5	4	RPS Group	88	96	32	41	31	1	1	506	588	£61,300,000
6	9	URS	75	59	16	49	25	12	16	466	485	
7	6	Capita	74	84	4	12	28		31		105	
8	7	WYG	64	79	25	11	19	6	6	362	380	£34,800,000
9	12	Arup	52	48	17	14	26	13	14	381	401	£46,624,000
10	8	Deloitte	51	61	9	19	26	9	9	71	76	£8,500,000
11	14	CGMS	50	39	18	11	19	4	4	90	105	£8,030,000
12	11	GL Hearn49	49	25	13	11			85		96	£9,996,000
13	13	Indigo Planning	46	43	8	25	21	16	16	60	91	£6,889,000
14	15=	Atkins	45	39	1	5	23			400	500	£44,000,000
15	18=	Peter Brett Associates	41	32	12	17	11	3	3	44	108	£9,419,000
16	14	Jones Lang LaSalle	40	37	13	13	17	6	6	47	52	£8,048,000
17	20	AMEC	31	28	8	9	10	7	7	183	193	£8,978,000
18	25	Boyer Planning	28	25	9	6	9	8	9	46	53	£3,900,000
19	21	Terence O'Rourke	27	27	14	11	12	1	1	66	74	£7,000,000
20	18=	David Lock Associates	26	29	10	11	9	5	5	50	58	£5,137,000
21=	25=	Alliance Environment & Planning	25	20	10	3	8		6	25	31	£2,700,000
21=	24	Bidwells	25	24	9	7	8	1	1	28	40	
23	28=	Carter Jonas	23	16	4	5	7		10	33	37	
24=		DPP One	20		9	2	9	5	5	25	28	
24=	32=	Quod	20	14	9	6	6	12	12	42	51	
26=		CH2M Hill	19		4	9	2	2	2	25	25	
26=	27	DTZ	19	17	5	4	8			19	21	£1,100,000
26=	24=	Peacock and Smith	19	18	3	3	7	2	2	20	22	£2,850,000
29	30=	Rapleys	18	15	5	9	9	2	2	18	23	
30	36=	SLR Consulting	17	13	6	6	6	3	3	200	220	£13,000,000
31	30=	DHA Planning	16	15	6	4	5	2	2	24	29	
32=	36=	Adams Hendry Consulting	15	13	4	6	8	2	2	17	21	£1,850,000
32=	45=	Smiths Gore	15	11	3	4	6	3	3	18	30	
34=	36=	Bell Cornwell	14	13	6	1	5	1	1	15	18	
34=	32=	Iceni Projects	14	14	10	2	2	6		21	40	
34=		Nexus Planning	14		4	5	2	3	3	18	21	
34=	32=	Spawforths	14	14	4	2	5	1	1	22	27	
38=	45=	AECOM	12	11	6	4	4					
38=	48=	BDP	12	10	4	3	6	3	3	13	13	£801,000
38=	41=	Hunter Page Planning	12	12	4	2				21	21	
38=	41=	Tetlow King Planning	12	12	5	2	6	3	3	15	18	£1,200,000
42	61=	Asbri Planning	11	6	3	4	2	3	3	14	16	£1,400,000
43=		Axis	10		2	4				22	24	£3,800,000
43=		ERM	10		2	1	5	2	10	150	250	£2,750,000
43=	54=	Planning Perspectives	10	8	4	2	5	1	2	13	17	£1,400,000
43=	41=	Planning Potential	10	12	4	3	7	6	6	16	20	£1,600,000
43=	48=	Wardell Armstrong	10	10	1	6	4	3	4	250	330	£3,000,000
48=	53	Alder King	9	8.2	4	1	3	1	1	10	11	£887,000
48=		Ryden	9		3	3	4	1	1	11	14	
48=	45=	Scott Brownrigg Planning	9	11	2	4	2			9	11	£650,000
48=		SKM Enviro	9		3	2	1	4	4	82	82	£5,550,000
48=	57=	Steven Abbott Associates	9	7	4	3				9	12.5	£850,000
53=	52	CSJ Planning Consultants	8	9	3	2	5	1		8.5	10.5	£700,000
53=	54=	DLA Town Planning	8	8	2	6				8	11	£500,000
53=		Marrons Planning	8		4	2	2			8	10	
53=	54=	Tyler-Parkes Partnership	8	8	3	1	4			10	14.5	
57=	57=	Brooke Smith Planning	7	7	2		4	1		8	10	
57=	61=	England & Lyle	7	6	3	2	2	1		7	8	

Following several years of caution about the economic recovery, the pressure on planning consultancy teams seems to be receding, with most of the top firms having increased their contingent of planners over the past 12 months.

Indeed, of the top 20 planning consultancies ranked by numbers of chartered town planners, 12 increased their numbers of RTPI-qualified planners in the year up to 1 September 2013. Six reduced numbers of chartered planners, while two have kept numbers stable. Turley Associates has seen the biggest increase, with 23 additional chartered town planners, while Barton Willmore has added 20, URS 16 and CGMS 11. Numbers of student and licentiate members of the Royal Town Planning Institute (RTPI) among the top 20 firms are also up, at 159 this year compared to 128 last year.

Barton Willmore has topped our survey staffing rankings again (see table, right). Last year, it was fielding the highest number of chartered town planners ever recorded in this survey at 146, but this year the team has expanded further to 166.

Ian Tant, senior partner at Barton Willmore, says that growing activity across the sector has driven the increase. Although London has remained particularly resilient during the downturn, he says workload is growing across the country.

He says the firm's northern offices have also taken on extra staff and highlights the company's decision to open a new office in Newcastle in May.

Workload has been particularly spurred by activity in the housing and retail sectors, Tant says. But the firm has also seen a significant increase in its research workload, as it aims to build the evidence base that is needed to support planning

**"The National Planning Policy Framework requires objective assessment of needs"**

Ian Tant,  
Barton Willmore

LEADING EMPLOYERS OF CHARTERED TOWN PLANNERS 2013

RANK 2013	RANK 2012	COMPANY	CHARTERED PLANNERS 2013	CHARTERED PLANNERS 2012	DIRECTORS OR PARTNERS	ASSOCIATES OR EQUIVALENT	WOMEN PLANNERS	NON-CORPORATE RTP1 MEMBERS	RTP1 STUDENT OR LICENTIATES	FEE EARNERS	TOTAL STAFF EMPLOYED	PLANNING FEE INCOME 2012/13
57=		John Ashton	7		1		2			7	8	£53,000
57=	61=	Vincent and Goring	7	6	1	5	2			8	9	£1,100,000
57=		West Waddy ADP	7		1		1			7	8	
62	60	D&M Planning	6.5	6.5	3	1.5	2.5			8	10	
63		Southern Planning Practice	6.2		3	1.2	1.8		1	7	10	
64=	61=	Fisher German	6	6	3	2	3	3	3	9	11	£600,000
64=	68=	Kemp & Kemp Planning	6	5	2	1	2	2		8	15	
64=	61=	LUC	6	6	4	1		2	5	94	110	£2,664,000
64=	68=	Mango Planning & Development	6	5		5	2			6	7	
64=	57=	NJL Consulting	6	7	2	2	2	3	5	11	13	£1,010,000
69=		Arcus Consultancy Services	5		1	1	3	1	1	8	60	£1,100,000
69=	80=	AS Planning	5	4	1	1	5			5	7	£434,000
69=	68=	Beacon Planning	5	5	3	2	2	1	1	9	11	£576,000
69=	96=	BPTW Partnership	5	3	2	1		3	3	8	10	£710,000
69=	68=	Hives Planning	5	5	3	1	2			5	6	£800,000
69=	68=	Keppie Planning	5	5	2	2	2			5	6	
69=	61=	Stansgate Planning	5	6	3		2			6	9	
69=	80=	TP Bennett	5	4	3	2		1		6	6	£500,000
69=		TSA Planning	5		1						6	
69=		WS Planning and Architecture	5		3		2			10	11	
79=		Aspinall Verdi	4		4					6	6	
79=	61=	Fairhurst	4	6	1		1	5	5	16	16	£1,212,000
79=	80=	Harris Lamb	4	4		1				6	7	
79=	114	Henry Adams Planning	4	3	2	2	2.5			3	3	
79=		Knights	4		1	1		3		10	10	
79=	80=	Landmark Planning	4	4	2			1		4	6	£375,000
79=	80=	Metropolis Planning & Design	4	4	3	1				18	19	£1,216,000
79=	68=	O'Neill Associates	4	5	1	2	1			4	5	£331,000
79=	80=	Paul Butler Associates	4	4	3			1		5	6	£250,000
79=		Renew Planning	4		2	1	1			4	4	
79=	80=	Tanner & Tilley Planning	4	4	2	2	1			6	8	£360,000
90=	96=	Aspect360	3	3	2	1				2	2	£200,000
90=	96=	Berrys	3	3			2		1	7	50	£500,000
90=	96=	Bluestone Planning	3	3	1	2				1	2	£90,000
90=		Cass Associates	3		2		1			3	5	£350,000
90=	80=	Clyde Shanks	3	4	1	1		2		6	6	£450,000
90=	96=	Cundall	3	3	1					8	8	£539,000
90=	96=	DMH Stallard	3	3	2	1		1	3	9	11	
90=		GP Planning	3		1	1	2	2	2	6	7	
90=		Harmers	3		2	1				3	5	£330,000
90=		Hayston Developments & Planning	3		1		1	1	1	5	6	
90=		Hobbs Parker	3		1		2			3	3	
90=		John R Paley Associates	3		1	2				11	12	
90=		Ken Wainman Associates	3		1		1			3	3	£70,000
90=	80=	Kirkwells	3	4	4	1	1			3	6	
90=	96=	Lanpro Services	3	3	1	2	1	2		5	7	£490,000
90=	96=	Lee Evans Planning	3	3	2	1	1	1	1	4	6	£300,000
90=		McLoughlin Planning	3		1	1				3	4	£138,000
90=		Meeson Williams Phillips	3		1	1	1			3	3	£325,000
90=		Nash Partnership	3		1	1	1	1	1	5	37	
90=	96=	NPS Property Consultants	3	3		1	2			4	4	
90=	96=	Parker Dann	3	3	2		1	2	2	5	6	
90=		Porta Planning	3		2	1				3	1	£376,000
90=		RCA Regeneration	3		2		1			4	5	£560,000
90=		Robert Doughty Consultancy	3		2		1		1	7	11	
90=		SF Planning	3		2	1	1			4	4	
90=		Stratus Environmental	3	2			1	1	1	20	20	£1,021,000
90=	96=	Wildstone Planning	3	3	2	1	2	1		4	6	£300,000

“There comes a tipping point when you think: ‘Now we are going to take positive action’”  
David Lowin, WYG

applications. “The National Planning Policy Framework (NPPF) requires objective assessment of needs for all forms of development,” he says.

URS has also seen a significant increase in its planning team, from 59 in 2012 to 75 this year.

Martin Herbert, technical director and head of planning at URS, says that viability assessment work is plentiful, as there is an increased focus on demonstrating the economic feasibility of planning proposals following the government’s guidance in the NPPF.

But recent wins, such as the Bank tube station capacity upgrade, as well as ongoing work on huge infrastructure projects in the capital – including north-south train link Crossrail and the 25km east-west Thames Tideway sewer tunnel – have also driven its staffing boost, he says.

Herbert points to recruitment of two planners to its team in Edinburgh, driven by residential work, as well as seven new planners in London. In anticipation of further intensification of its workload on major infrastructure projects, URS is expecting to further increase its number of chartered town planners in the coming months.

Neighbourhood planning is another important area for the firm. It expects to recruit as a result of winning a government neighbourhood planning contract last month. It will be working with community group umbrella body Locality, which provides support and grants on behalf of the government for groups undertaking neighbourhood planning, and the Royal Town Planning Institute, Herbert adds.

Meanwhile, at CGMS, numbers of chartered town planners have risen from 39 to 50 in the year to 1 September, but it looks likely that the consultancy will expand further in the coming months, according to John Stockdale, finance director of the planning team at the firm. “We seem to be under constant pressure in terms of reaching capacity on a weekly basis,” he says.

“We are beginning to think we are going to have to go out [and recruit] again, probably before we get to the end of the year,” he adds. “But we are trying to hold off on that if we can until everybody is bedded in.”

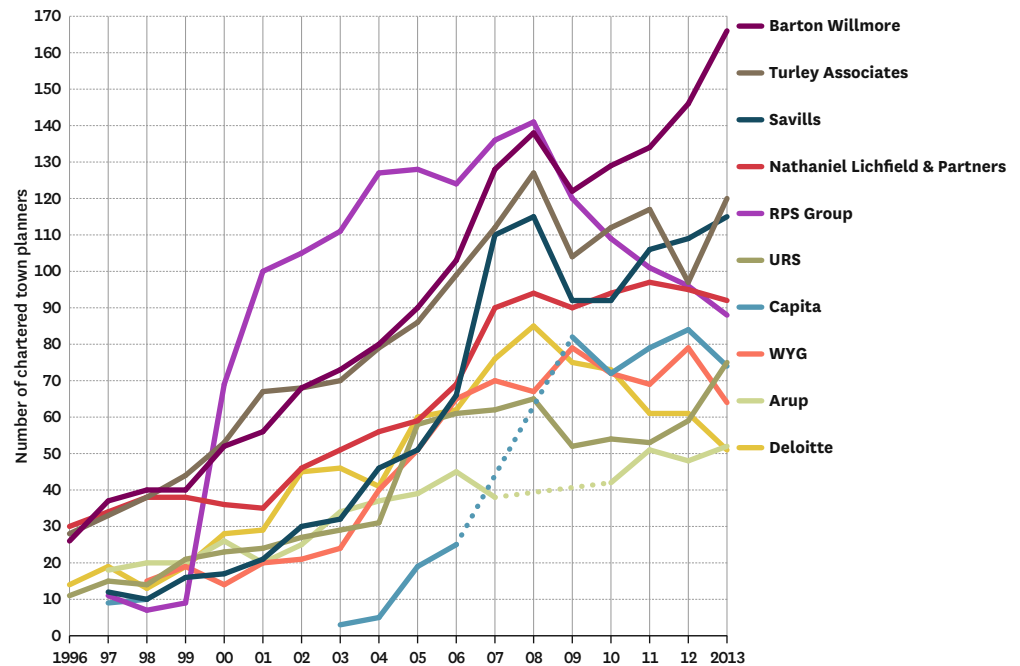
And although the firm remains cautious about opening further offices, it has expanded in its London office, which it moved into about 18 months ago. “We are now probably getting towards the maximum that we can hold here. But if we were to expand anywhere it would be here,” Stockdale says.

Turley Associates is also expecting to recruit further on the back of significant increases in staff numbers in recent months, which were spurred by growth in the consultancy’s teams covering heritage, sustainability, economic planning and local engagement. The number of chartered town planners the firm employs rose from 97 in 2012 to 120 in 2013.

Rob Lucas, the firm’s chief executive, says the



GROWTH OF LEADING EMPLOYERS OF CHARTERED TOWN PLANNERS



Where lines are dotted, it indicates years in which the firm did not take part in the survey

economic recovery is providing a sizeable boost to the residential sector, and the firm is also gaining from growth in the energy sector, covering wind farms, biomass and energy infrastructure.

Its most significant growth was in Manchester, where it grew from six to 20 planners, and Bristol, where it grew from four to 14.

Several firms have expanded teams around the country. Capita, which runs outsourcing services on behalf of local authorities, has increased the number of planners based in London after it won a contract to run development management and strategic planning services for the London Borough of Barnet in August. But it has cut numbers in Salford and East Dereham

Nathaniel Lichfield & Partners (NLP) expanded its team in Leeds to exploit growth in its work in the region. The Leeds office was opened in 2012 with three staff, but in 2013 the team grew to six, including four chartered planners, and moved to bigger premises.

SLR Consulting, meanwhile, opened an office in London with one planner. David Sandbrook, head of planning at SLR, explains that it has traditionally been focused on the mineral and waste sector, which the firm felt it could service from its regional offices. However, it has expanded its breadth of work in response to the recession and now does far more general planning work, especially in housing, large infrastructure projects and environmental impact assessment, for which it felt it needed an office in the capital.

Sandbrook says the consultancy wants to further grow its housing work and plans further recruitment in this office.

Alliance Environment and Planning has added five chartered planners in the past year. The firm's director Debbie Fidgett cites increasing work across all sectors, including residential work, brownfield development, quarrying and increasingly solar farms.

The firm has offices in Birmingham, London and Guildford and this year, it opened an office in Milton Keynes with two planners at director level. This was to extend its geographical cover to cover the East of England region. The company is planning to recruit further in all offices, says Fidgett.

Carter Jonas's stock of planners rose by seven in the past year. Nick Taylor, head of planning and development at the firm, says that its London office, which opened at the end of 2011, is growing its numbers the fastest and now has six chartered town planners, including two masterplanners. One of the main drivers is its status as a preferred supplier on the Government Procurement Service list, which it was appointed to in April. This has resulted in planning work for local authorities and public sector bodies looking to redevelop their estates, he says.

Many consultants are planning further recruitment over the coming year. Of 171 firms that responded to questions about the

“Senior business leads and expert consultants are really quite difficult to find”  
Rob Lucas, Turley Associates

future size of their planning teams, 49 per cent said they expected to see staff numbers grow over the next 12 months, compared to 48 per cent last year. And just 2.5 per cent of these firms said their planning teams are likely to contract in the months ahead.

However, the search for talent is not easy, as consultants report the return to a competitive recruitment market. Lucas at Turley Associates says: “Junior-level staff are easier [to find], but senior, experienced business leads and expert consultants are really quite difficult.”

Tant at Barton Willmore agrees it can be difficult to find the right people. The recession has reduced the number of new planners coming through, he says.

But over the past 12 months there has been an increased willingness among private sector planners to switch firms, he notes. “The fear behind moving has subsided, and we are finding good people out there, both those who are recently qualified and those with experience.”

However, not all firms have been boosting staff numbers, with Nathaniel Lichfield and Partners, RPS Group, Capita, WYG, Deloitte and David Lock Associates all reducing their number of chartered planners over the past year, according to the survey.

David Lowin, WYG's head of plan-

ning, says its decline in numbers stemmed from not replacing staff who left or retired, a strategy it used because of uncertainty about the pace of economic recovery. “You don't want resources sitting idle,” he says. “So when people decided that they were leaving we had a good look at our supply of work and thought: ‘Well, can we manage without them? Largely through this year we have been able to do that.’”

But Lowin says the uncertainty that prevailed has now subsided, and the firm is expecting its number of planners to rise over the next 12 months.

Its acquisition of Higham & Co in Manchester in early October points to a renewed confidence. “At all times, particularly when you are coming out a recession or you think you might be, there comes a tipping point when you think: ‘Right, now we are going to take positive action’,” he adds. “And I think that happened somewhere during this past year.”

“We seem to be under constant pressure in terms of reaching capacity on a weekly basis”  
John Stockdale, CGMS

**DEFINITIONS** Staff figures relate to full-time or full-time equivalent staff employed in UK offices at 1 September. Fee income figures relate to year ending 31 March unless otherwise stated. Figures for directors, partners, associates and equivalent, and women planners show chartered town planners only. Non-corporate RTPI members include technical, student, licentiate, legal and associate members. Fee earners are employees whose time is billed to clients. Total staff includes all managerial, professional, technical and administrative staff employed in planning.

See overleaf for national staffing levels map

# Main UK planning teams by regions and nations

Number of chartered town planners in planning consultancies' offices in UK towns and cities (minimum four chartered planners)

## SCOTLAND

### Aberdeen

Ryden ..... 5

### Edinburgh

Barton Willmore ..... 11

Jones Lang LaSalle ..... 6

URS ..... 6

Smiths Gore ..... 4

Turley Associates ..... 4

### Glasgow

Jones Lang LaSalle ..... 6

Keppie Planning ..... 5

## NORTHERN IRELAND

### Belfast

Turley Associates ..... 9

RPS Group ..... 5

TSA Planning ..... 5

URS ..... 4

## WEST MIDLANDS

### Birmingham

Turley Associates ..... 14

Alliance Planning ..... 10

Brooke Smith Planning ..... 9

RPS Group ..... 9

CH2M Hill ..... 5

Harris Lamb ..... 4

Jones Lang LaSalle ..... 4

### Leamington Spa

AMEC Environment and

Infrastructure UK ..... 13

### Newcastle-under-Lyme

Knights ..... 4

### Shrewsbury

AMEC Environment and

Infrastructure UK ..... 8

### Solihull

Barton Willmore ..... 14

Tyler-Parkes Partnership ..... 8

Arup ..... 5

### Stoke-on-Trent

Wardell Armstrong ..... 5

### Stratford-upon-Avon

Stansgate Planning ..... 5

## NORTH WEST

### Chester

AXIS ..... 5

### Manchester

Turley Associates ..... 20

Indigo Planning ..... 11

Nathaniel Lichfield & Partners ..... 11

Barton Willmore ..... 8

Peter Brett Associates ..... 8

DPP One ..... 7

Savills ..... 7

WYG ..... 7

GL Hearn ..... 6

### Arup

..... 5

Rapleys ..... 5

NJL Consulting ..... 5

URS ..... 5

Jones Lang LaSalle ..... 4

Paul Butler Associates ..... 4

**Salford**

Capita ..... 17

**Wigan**

Steven Abbott Associates ..... 7

**Wilmslow**

AXIS ..... 5

## EAST MIDLANDS

### Ashby de la Zouch

Fisher German ..... 6

### Leicester

Marrons Planning ..... 8

Landmark Planning ..... 4

Peter Brett Associates ..... 4

### Newark

CGMS ..... 5

### Nottingham

Capita ..... 4

## WALES

### Bridgend

Mango Planning & Development ..... 6

### Cardiff

Nathaniel Lichfield & Partners ..... 14

RPS Group ..... 12

Asbri Planning ..... 9

WYG ..... 7

Arup ..... 5

Barton Willmore ..... 5

Boyer Planning ..... 5

Savills ..... 4

## SOUTH WEST

### Bournemouth

Terence O'Rourke ..... 22

Tanner & Tilley Planning ..... 4

### Bristol

Barton Willmore ..... 16

Turley Associates ..... 14

WYG ..... 14

RPS Group ..... 12

Alder King ..... 9

Peter Brett Associates ..... 9

CSJ Planning Consultants ..... 8

GL Hearn ..... 8

Savills ..... 5

Jones Lang LaSalle ..... 4

### Cheltenham

Hunter Page Planning ..... 11

### Taunton

Smiths Gore ..... 4

### Wellington

WYG ..... 8

### Wimborne

Savills ..... 15





### NORTH EAST

<b>Darlington</b>	
England & Lyle	7
<b>Newcastle upon Tyne</b>	
Nathaniel Lichfield & Partners	17
Fairhurst	4
<b>North Shields</b>	
Capita	16

### YORKSHIRE AND THE HUMBER

<b>Harrogate</b>		Savills	5
Carter Jonas	8	WYG	5
<b>Leeds</b>		Arup	4
Spawforths	14	DTZ	4
Peacock and Smith	13	Nathaniel Lichfield & Partners	4
Indigo Planning	10	<b>York</b>	
Turley Associates	10	O'Neill Associates	4
Barton Willmore	7		
DPP One	6		

### EAST OF ENGLAND

<b>East Dereham</b>		Beacon Planning	4	<b>Norwich</b>	
Capita	7	<b>Chelmsford</b>		Bidwells	9
<b>Cambridge</b>		Bidwells	5	<b>St Albans</b>	
RPS Group	8	Capita	4	DLA Town Planning	7
Barton Willmore	7	<b>Colchester</b>		<b>Stevenage</b>	
Savills	7	Boyer Planning	6	Vincent and Goring	7
Bidwells	6				

### LONDON

Barton Willmore	50	Quod	20	Peacock and Smith	6
Nathaniel Lichfield & Partners	46	RPS Group	16	Scott Brownrigg Planning	6
CGMS	45	Iceni Projects	14	LUC	5
Savills	41	Planning Perspectives	10	Terence O'Rourke	5
URS	39	Rapleys	10	Boyer Planning	4
Turley Associates	38	Peter Brett Associates	9	CH2M Hill	4
GL Hearn	33	Alliance Environment & Planning	8	ERM	4
Capita	27	DTZ	8	Metropolis Planning & Design	4
Arup	25	WYG	8	Nexus Planning	4
Indigo Planning	25	Planning Potential	8	RENEW Planning Limited	4
Jones Lang LaSalle	22	Carter Jonas	6		

### SOUTH EAST

<b>Abingdon</b>		<b>Oxford</b>	
John Ashton	7	RPS Group	18
West Waddy ADP	7	Savills	7
<b>Basingstoke</b>		<b>Reading</b>	
URS	6	Barton Willmore	31
<b>Chichester</b>		Savills	6
Henry Adams Planning	4	Hives Planning	5
<b>Crowborough</b>		Peter Brett Associates	4
A S Planning	5	<b>Reigate</b>	
<b>Ebbfleet</b>		WS Planning & Architecture	5
Barton Willmore	17	<b>Southampton</b>	
<b>Godalming</b>		Turley Associates	10
D&M Planning	6.5	Savills	9
<b>Guildford</b>		WYG	9
Alliance Environment & Planning	5	<b>Twyford</b>	
<b>Hook</b>		Southern Planning Practice	6.2
Bell Cornwell	9	<b>Weybridge</b>	
<b>Maidstone</b>		Nexus Planning	7
DHA Planning	16	<b>Winchester</b>	
<b>Milton Keynes</b>		Adams Hendry Consulting	15
David Lock Associates	26	<b>Wokingham</b>	
Bidwells	4	Boyer Planning	12

# Reaping the rewards

Fee income has risen as firms  
have explored new avenues,  
says Susie Sell

**M**ost consultancies seem to have enjoyed a year of rising revenues. Nearly 75 per cent of respondents to the survey said fee income rose between March 2012 to March 2013, against 20 per cent who cited a fall. The top ten earners in this year's survey brought in a total of £283 million, compared to £257 million in 2011/12, and £243 million the year before.

But despite the financial boost that many have experienced, there is widespread optimism that next year will be even better. A total of 76 per cent of firms predict a rise in fee income over the next 12 months.

RPS Group has topped the table again, with a fee income of more than £61 million.

Arup, in second place, reports a significant increase in planning fee income, from £26 million last year to £47 million this year. It says this was due in part to the economic upturn, but also to the firm's re-focus of its philosophy of what it calls integrated planning. This relates to how teams are set up with the aim of helping all disciplines communicate effectively on all aspects of a project, for example, a transport planner's opinion on an economic issue could lead to a different approach being taken.

Malcolm Smith, Arup's global masterplanning and urban design leader, believes that this approach provides a marked advantage and has led to both winning more work and completing it more efficiently.

Smith adds that infrastructure work, covering rail, airports and water systems, was also key to Arup's fee growth. The firm has also been busy with assessment of the outcome of projects. "Increasingly, one has to be able to articulate the value of infrastructure, not just as a technical, engineering outcome," he says.

WYG is another firm that has seen a significant boost in fee income, rising from £22 million in 2012 to £35 million this year. Its work in the energy sector has been a key driver. The firm has been busy working

"As a  
multi-disciplinary  
consultancy, we saw  
opportunities in the  
energy sector"

David Lowin,  
WYG

## HIGH-EARNING UK PLANNING CONSULTANCIES 2012/13

RANK 2013	RANK 2012	CONSULTANCY	FEE INCOME 2012/13	FEE INCOME 2011/12	CHARTERED PLANNERS	PLANNING FEE EARNERS	PREDICTED CHANGE 2013/14 %
1	1	RPS Group	£61,300,000	£61,000,000	88	506	
2	2	Arup	£46,624,000	£36,290,000	52	381	
3	3	Atkins	£44,000,000	£34,000,000	45	400	5
4	4	WYG	£34,800,000	£22,110,000	64	362	
5	6	Barton Willmore	£21,800,000	£19,200,000	166	231	20
6	8	Turley Associates	£19,200,000	£16,733,000	120	142	
7	7	Savills	£19,000,000	£18,800,000	115	153	10
8	10	Nathaniel Lichfield & Partners	£13,500,000	£13,000,000	92	134	
9	11	SLR Consulting	£13,000,000	£11,600,000	17	200	10
10	14	GL Hearn	£9,996,000	£7,900,000	49	85	10
11	13	Peter Brett Associates	£9,419,000	£8,264,000	41	44	7
12	19=	Amec Environment and Infrastructure UK	£8,978,000	£5,600,000	31	183	
13	12	Deloitte Real Estate	£8,500,000	£8,500,000	51	71	
14	16	Jones Lang LaSalle	£8,048,000	£7,008,000	40	47	12
15	23	CGMS	£8,030,000	£4,400,000	50	90	10
16	15	Terence O'Rourke	£7,000,000	£7,500,000	27	66	5
17	18	Indigo Planning	£6,889,000	£6,441,000	46	60	8
18		SKM Enviros	£5,550,000		9	82	0
19	21	David Lock Associates	£5,137,000	£4,975,000	26	50	15
20	24	Boyer Planning	£3,900,000	£3,500,000	28	46	13
21		Axis	£3,800,000		10	22	5
22	33	Wardell Armstrong	£3,000,000	£1,500,000	10	250	5
23	28	Peacock and Smith	£2,850,000	£2,300,000	19	20	5-10
24		Environmental Resources Management	£2,750,000		10	150	10
25	27	Alliance Environment & Planning	£2,700,000	£2,320,000	25	25	10
26	26	LUC	£2,664,000	£2,376,000	6	94	8
27	32	Adams Hendry Consulting	£1,850,000	£1,551,000	15	17	
28	30=	Planning Potential	£1,600,000	£1,700,000	10	16	10
29=	29	Planning Perspectives	£1,400,000	£1,763,000	10	13	25
29=	47=	Asbri Planning	£1,400,000	£900,000	11	14	15
31	43	Metropolis Planning & Design	£1,216,000	£1,007,000	4	18	28
32	35	Fairhurst	£1,212,400	£1,404,000	4	16	0
33	40	Tetlow King Planning	£1,200,000	£1,150,000	12	15	5
34=	44=	DTZ	£1,100,000	£1,000,000	19	19	20
34=	44=	Vincent and Goring	£1,100,000	£1,000,000	7	8	5
34=		Arcus Consultancy Services	£1,100,000		5	8	10
37	51	Stratus Environmental	£1,021,000	£757,000	3	20	0
38		NJL Consulting	£1,010,000	£1,050,000	6	11	10
39		Phil Jones Associates	£1,000,000	£751,000	2	13	20
40		Alder King	£887,000	£751,000	9	10	<5
41		ADAS	£868,000		2	3	5
42	50	Steven Abbott Associates	£850,000	£818,000	9	9	9
43	39	BDP	£801,000	£1,152,000	12	13	
44	41	Hives Planning	£800,000	£1,100,000	5	5	0
45		JTS Partnership	£750,000	£750,000	2	7	5
46		BTPW Partnership	£710,000		5	8	
47	46	CSJ Planning Consultants	£700,000	£925,000	8	8.5	5
48	54=	Scott Brownrigg Planning	£650,000	£750,000	9	9	10
49		Fisher German	£600,000	£580,000	6	9	15
50		Beacon Planning	£576,000	£462,000	5	9	25
51		RCA Regeneration	£560,000		3	4	45
52		Cundall	£539,000	£516,000	3	8	10
53=		DLA Town Planning	£500,000	£525,000	8	8	5
53=		TP Bennett	£500,000		5	6	
53=		Berrys	£500,000	£400,000	3	7	20



on solar and wind farm projects, including a scheme in Wiltshire for 35,000 ground-mounted solar panels, which gained planning consent earlier this year.

The firm has also been working on the carbon capture and storage project at Drax coal-fired power station in East Yorkshire, and on modernising the national grid infrastructure across the UK on behalf of National Grid.

“We saw opportunities [in the energy sector],” says David Lowin, WYG’s head of planning. Being a multi-disciplinary consultancy helps, as professionals such as acousticians, landscape architects and ecologists are all in demand, he says. Lowin adds that the upturn in the economy is also providing a good outlook for the residential sector, and he predicts that there will be a boost in developers building to let.

Wardell Armstrong stands out as a firm that experienced a strong increase in revenue, doubling its fee income from £1.5 million in 2012 to £3 million in 2013. Stephen Stoney, the firm’s technical director, attributes the climb to a deliberate change in direction. “We are now putting a lot more attention into the front-end of promoting developments, and being proactive,” he says.

Since the change was put in place at the end of 2012, the firm has been working on residential and mixed-use developments, promoting sites and securing allocations in plans. “If we don’t seize this initiative now after the spur the government has given, then I don’t see when or how we ever could,” Stoney says.

Of consultancies who gave data on fee rates, 68 per cent said that they did not change their fee rates in the year ending to 1 September 2013. Seven per cent made a one to four per cent increase, 18 per cent a five to ten per cent rise and 12 per cent a hike of more than ten per cent. Many are planning to maintain fee rates next year, with 77 firms predicting no rise in fee rates. However, 24 are predicting a fee rate hike of ten per cent or more.

Mark Connell, director of planning and development at Jones Lang LaSalle, says that the firm is looking to keep fee rates stable for now. While the economy has been difficult, the firm sometimes undertook small research jobs for no fee, in the hope that this would lead to paid work, he explains. The firm plans to drive productivity by reducing such non-paid work, rather than by raising fees, though it will keep this under review, he says.

Alastair Crowdy, national head of planning, development and regeneration at GL Hearn, believes that consultancies will not have to reduce rates any more now that the market is growing again. They should now be able to raise them in certain situations, for example, if they have a specialist skill, he believes.

“We have probably gone through the worst of it. Now the market is actually coming back,” he says. **P**

**DEFINITIONS** Fee income figures relate to year ending 31 March. Staff figures relate to full-time or full-time equivalent staff employed in UK offices at 1 September 2013. Fee earners are employees whose time is billed to clients. Predicted % change shows consultancies’ estimated change in their total fee income between year ending 31 March 2013 and year ending 31 March 2014.

TOP FEE INCOME EARNERS 2012-13, BY SECTOR

Mixed-use brownfield

RANK	CONSULTANCY	FEE INCOME
1	RPS Group	£8,000,000
2	Arup	£3,651,000
3	Savills	£3,600,000
4	GL Hearn	£3,400,000
5	Barton Willmore	£3,200,000
6	Amec Environment and Infrastructure UK	£2,400,000
7	Turley Associates	£2,223,000
8	Deloitte	£2,000,000
9	SLR Consulting	£1,800,000
10	WYG	£1,592,000
11	Alliance Environment & Planning	£1,300,000
12	David Lock Associates	£1,250,000

Retail and town centres

RANK	CONSULTANCY	FEE INCOME
1	RPS Group	£6,200,000
2	WYG	£6,008,000
3	Turley Associates	£4,028,000
4	Barton Willmore	£3,100,000
5	Nathaniel Lichfield & Partners	£2,700,000
6	Indigo Planning	£2,500,000
7	Savills	£2,400,000
8	GL Hearn	£2,300,000
9	Deloitte	£2,000,000
10	Peter Brett Associates LLP	£1,687,000
11	CGMS	£1,250,000
12	Arup	£766,000

Mixed-use greenfield

RANK	CONSULTANCY	FEE INCOME
1	RPS Group	£4,000,000
2	Barton Willmore	£34,000,000
3	David Lock Associates	£3,000,000
4	WYG	£1,592,000
5	Savills	£1,500,000
6	Arup	£1,273,000
7	Deloitte	£1,000,000
8	Turley Associates	£556,000
9=	Hives Planning	£425,000
9=	CGMS	£425,000

Leisure, sport & entertainment

RANK	CONSULTANCY	FEE INCOME
1	RPS Group	£2,600,000
2	Savills	£2,000,000
3	Nathaniel Lichfield & Partners	£1,500,000
4	Arup	£1,076,000
5	Turley Associates	£904,000
6=	Deloitte	£500,000
6=	Barton Willmore	£500,000

Transport planning

RANK	CONSULTANCY	FEE INCOME
1	Arup	£25,390,000
2	RPS Group	£7,800,000
3	WYG	£7,616,000
4	Peter Brett Associates	£1,978,000

Residential development

RANK	CONSULTANCY	FEE INCOME
1	Barton Willmore	£7,000,000
2	Nathaniel Lichfield & Partners	£5,500,000
3	Turley Associates	£4,844,000
4	RPS Group	£4,800,000
5	WYG	£4,607,000
6	Savills	£4,100,000
7	Indigo Planning	£2,500,000
8	Boyer Planning	£2,400,000
9	Arup	£2,232,000
10	GL Hearn	£2,100,000
11	Deloitte	£2,000,000
12	SLR Consulting	£1,500,000

Energy planning

RANK	CONSULTANCY	FEE INCOME
1	RPS Group	£7,600,000
2	WYG	£4,978,000
3	Amec Environment and Infrastructure UK	£3,010,000
4	SLR Consulting	£3,000,000
5	Savills	£2,700,000
6	Arup	£1,548,000
7	Barton Willmore	£1,200,000
8	AXIS	£1,165,000
9	LUC	£995,000
10	GL Hearn	£900,000
11	ADAS	£700,000
12	Nathaniel Lichfield & Partners	£600,000

Commercial and industrial

RANK	CONSULTANCY	FEE INCOME
1	RPS Group	£6,400,000
2	Barton Willmore	£3,400,000
3	Arup	£2,823,000
4	WYG	£2,222,000
5	Nathaniel Lichfield & Partners	£1,700,000
6	Turley Associates	£1,405,000
7=	Deloitte	£1,000,000
7=	Savills	£1,000,000
9	CGMS	£950,000
10	Indigo Planning	£800,000

Waste management

RANK	CONSULTANCY	FEE INCOME
1	RPS Group	£3,900,000
2	SLR Consulting	£3,400,000
3	WYG	£1,431,000
4	Axis	£1,121,000
5	Arup	£525,000
6	Peter Brett Associates LLP	£518,000
7	Stratus Environmental	£390,810

Water supply and quality

RANK	CONSULTANCY	FEE INCOME
1	Arup	£4,484,000
2	RPS Group	£2,500,000
3	Peter Brett Associates	£1,036,000
4	Adams Hendry Consulting	£900,000