

Planning Market Insight Report from the Planning Portal



October 2020: Planning Market Insight Report



Welcome to our fifth Planning Market Insight Report.

We're now entering the final quarter of the year and planning and construction continues to experience uncharted territory as we navigate through uncertain times both at home and across the globe.

As reported last month, instead of the traditional summer slowdown in submissions, we've seen application volumes much higher than usual and September continued this upward trend. Indeed, three of the last four months have shown the highest number of submissions via the Planning Portal since our records began in 2005.

Last month applications were a huge 29% higher than September 2019, with Householder applications recording a whopping 46% increase! On looking at the recent application trends for householder developments, have the practical implications of working from home raised the need for that additional space? Maybe an extension to create larger living space or room for an office, or will a loft conversion free up space for an office in a bedroom?

There are also positive signs for larger schemes in September, with Full Planning and Outline consents showing levels above 2019 for the first time since February. See the section on application types for a more detailed update.

The summer months also brought new planning policy with prior approvals introduced in August and September. These will need to bed-in before we can start to understand their impact, and it's worth noting that the government's Planning for the Future [white paper](#) consultation is still open until 29 October 2020.

Though economic activity has picked up over summer, as we head into autumn and winter, it's clear that we have some tough months ahead of us. As rates of COVID-19 transmission increase across the UK, many areas are facing new lockdown restrictions and as with everything in this pandemic, it's difficult to predict what the impact may be. Add the end of the Brexit transition period into the mix and predictions become even more difficult. You can however be sure that in these unprecedented times we will continue to keep you up-to-date as the earliest source of planning application data on the market.



Sarah Jane Chilcott

Managing Director - Planning Portal

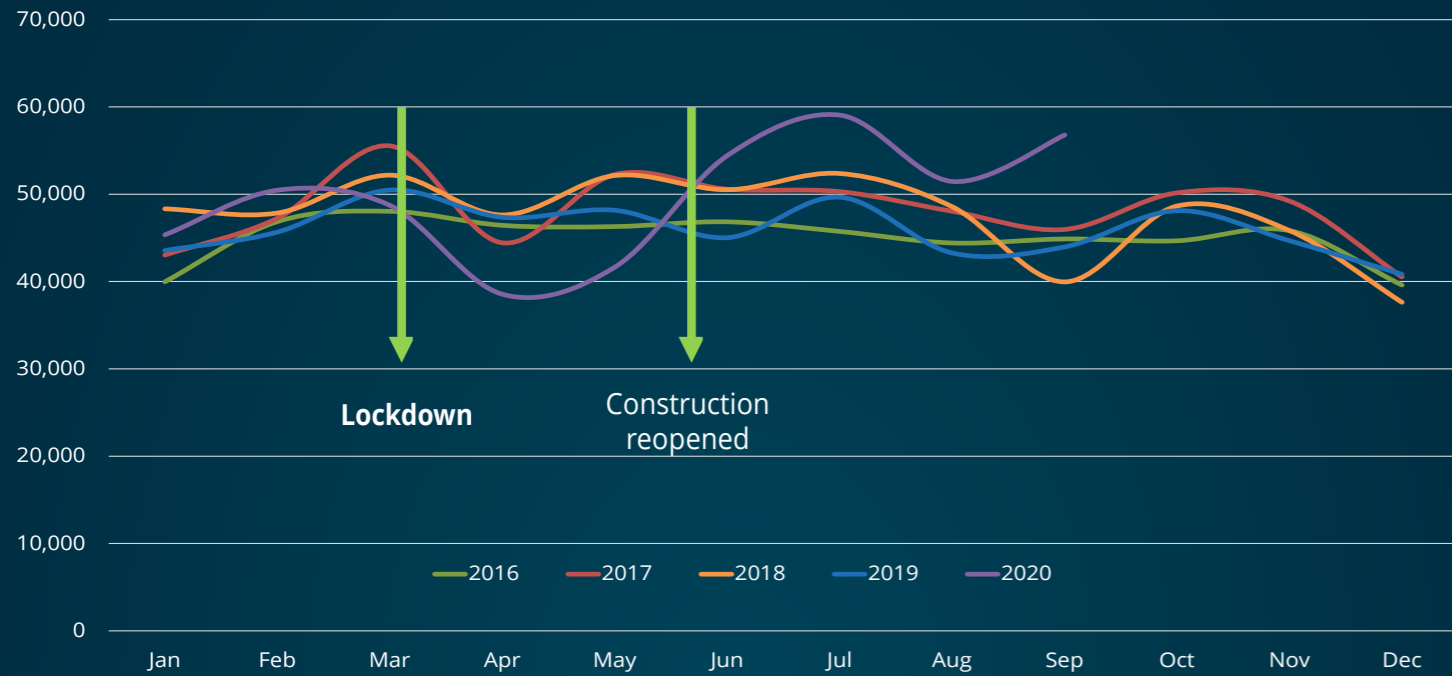
This report is provided for free on behalf of the Planning Portal and TerraQuest

To keep receiving our monthly updates, you must activate your free registration.

[Register Here](#)

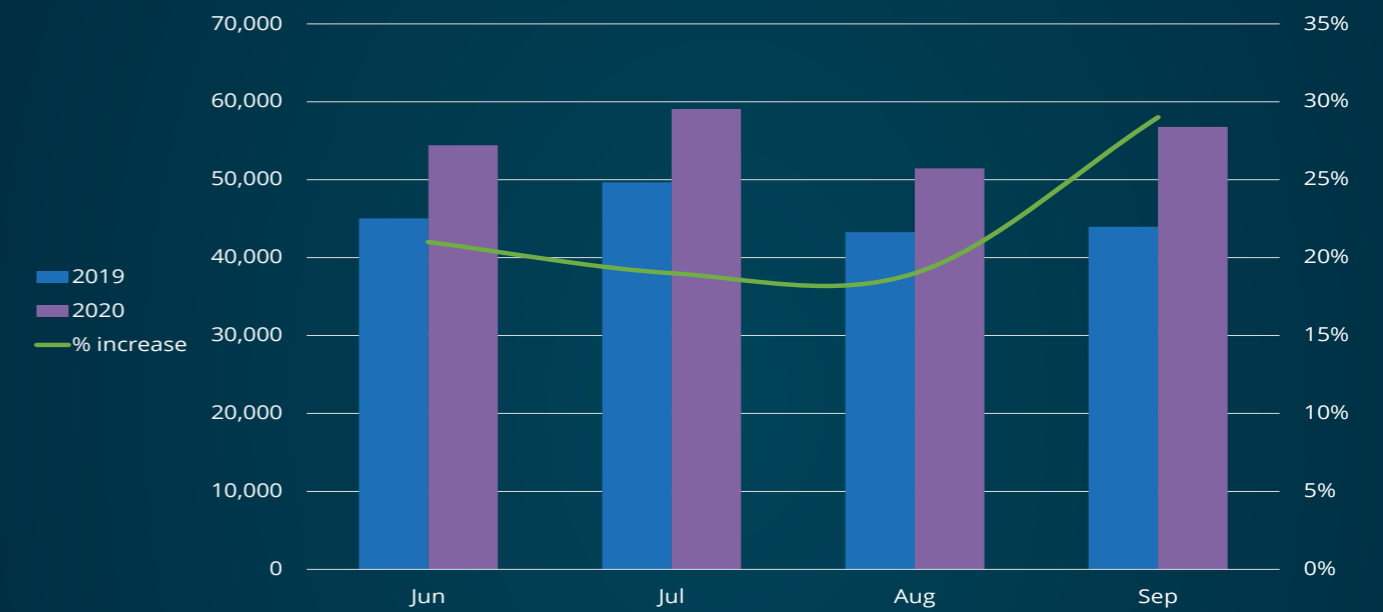
National graph over five years

Application numbers in England and Wales

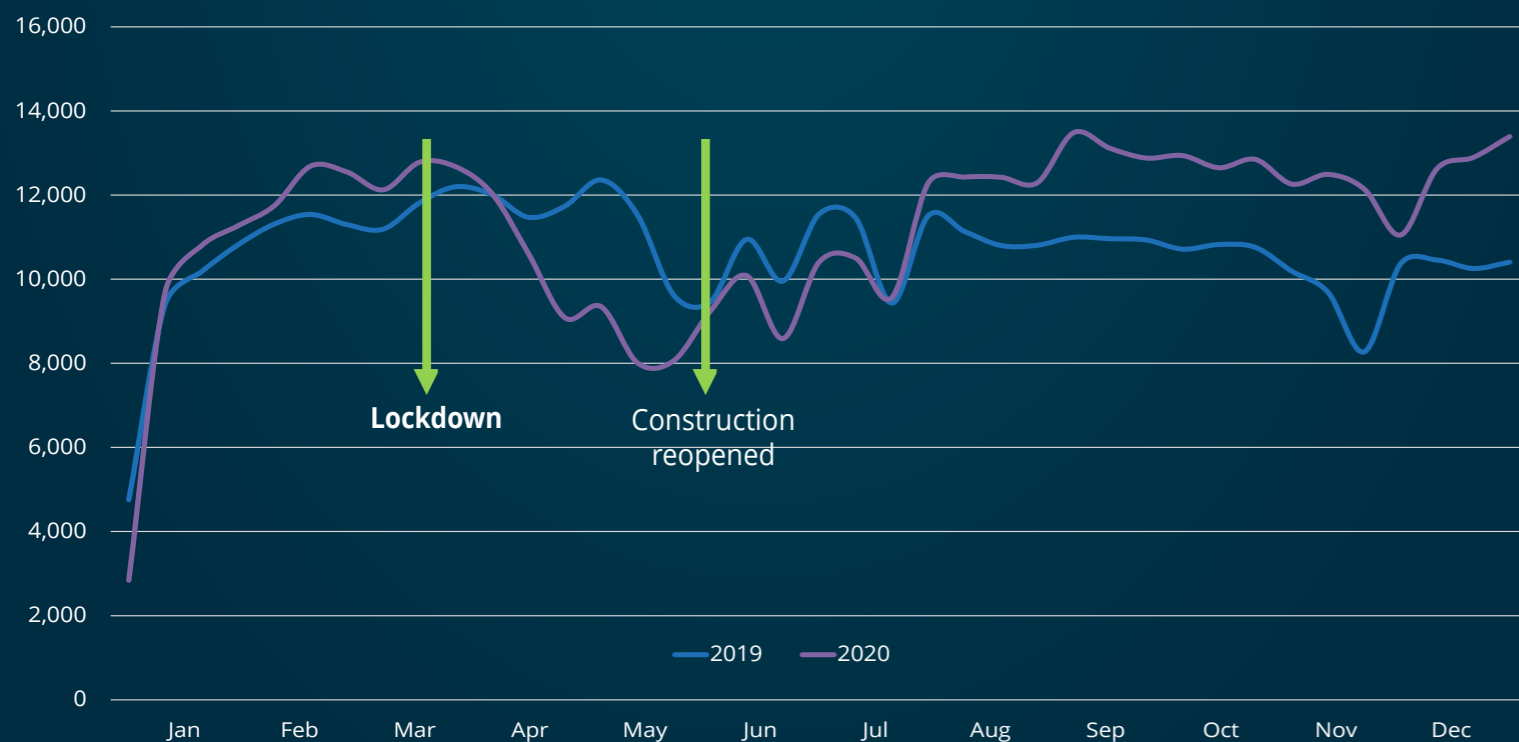


The national graph represents the number of online planning application submissions via the Planning Portal in the last five years, with a more detailed look at the first nine months of this year. This is useful because applications tend to have a reasonably standard seasonal pattern throughout the year and so comparing across years highlights any unusual trends.

In September 56,778 applications were submitted through the Portal; an increase of 10% compared to the previous month's total and our second highest month ever after July's all time high of 59,062. Compared to September 2019's total of 43,963 this was another increase of 29%, sustaining the increases realised in June, July and August.



National graph by week



We reported in last month's edition that we had reached the point where the shortfall in applications from March to May had been made up, so to see the increased trend continuing into September in such strong numbers is very surprising.

The national graph also clearly shows that when looking at the general submission trend that application numbers tend to fall slightly from August to September and then rise sharply in October.

It could be that some applications have been brought forward and therefore it remains to be seen what may happen for the remainder of the year. That said, it is a very positive sign in upturn or recovery since the COVID lockdown in late March.

Looking towards the final quarter, October generally achieves a good number of submissions that tails off and drops in November and December as we gear up for Christmas.

The regional view

Applications continued their upward trend in all regions of England and in Wales last month, with growth against 2019 actually accelerating in September.

The strongest recovery can be seen in the North of England, with applications in the North East 53% higher than last September, followed by the North West, where applications were up 37%.

London and the South East region continue to be lowest areas in terms of percentage growth, but were still a respectable 23% and 25% above last September's numbers. These regions also constitute by far the highest number of applications submitted nationally, between them totalling more than 22,000 submissions, around 40% of the national total. So, a smaller percentage increase here has a larger impact overall.

The line graph demonstrates the percentage above/below 2019 volumes for each English region and in Wales between March and September 2020.

The Regional View



Percentage change in applications



The map shows the movement between the August and September 2020 percentages. Whilst nationally the increase was 10% month-on-month, by looking at the regional picture, you can see a strong variation across the country.

Local Planning Authorities

This month we look at those authorities who have received the highest number of planning applications in September 2020. Unsurprisingly, more than half are London boroughs, but there are also many of the urban areas and unitary authorities in the South West, North West, West Midlands and Yorkshire and the Humber represented.

In every case other than Westminster, applications in September 2020 were higher than in 2019. Westminster's figures are impacted by the disproportionately high number of advertisement consents they typically process. Nationally, the difference across all application types was 29%, but the picture for the top 20 authorities is mixed, with several receiving 50%+ higher than last September.

If we use the year-on-year variations and look at how this has changed between August and September we also see a strong variation. Nationally, the difference between the growth in August to September was 10%, but even in this small subset we see some increases as high as 33% (Bournemouth, Poole and Christchurch) and in some areas growth slowing from August levels by 21% (Ealing).

LPA	Region	Aug 19	Aug 20	% (+/-)	Sep 19	Sep 20	% (+/-)	Variance in % Aug to Sept 20
Cornwall Council	South West	543	664	+22%	512	704	+38%	+15%
Leeds City Council	Yorkshire and The Humber	466	642	+38%	510	682	+34%	-4%
Barnet London Borough	London	441	508	+15%	446	637	+43%	+28%
Birmingham City Council	West Midlands	443	575	+30%	423	622	+47%	+17%
Dorset Council	South West	457	508	+11%	448	615	+37%	+26%
Wiltshire Council	South West	443	492	+11%	477	577	+21%	+10%
Westminster City Council	London	629	526	-16%	611	538	-12%	+4%
Croydon Council	London	366	445	+22%	419	505	+21%	-1%
Bournemouth, Christchurch and Poole (BCP) Council	South West	295	386	+31%	294	481	+64%	+33%
Bristol City Council	South West	357	437	+22%	388	469	+21%	-2%
London Borough of Bromley	London	357	403	+13%	368	456	+24%	+11%
Brent London Borough Council	London	302	374	+24%	297	443	+49%	+25%
Ealing Council London Borough	London	282	386	+37%	366	424	+16%	-21%
London Borough of Redbridge	London	254	365	+44%	302	422	+40%	-4%
Cheshire East Council	North West	357	364	+2%	333	410	+23%	+21%
Bradford Metropolitan District Council	Yorkshire and The Humber	226	342	+51%	246	409	+66%	+15%
London Borough of Hillingdon	London	311	351	+13%	298	393	+32%	+19%
London Borough of Richmond upon Thames	London	324	350	+8%	302	389	+29%	+21%
Wandsworth Borough Council	London	359	357	-1%	353	388	+10%	+10%
Enfield Council	London	241	332	+38%	251	383	+53%	+15%

Applications by type

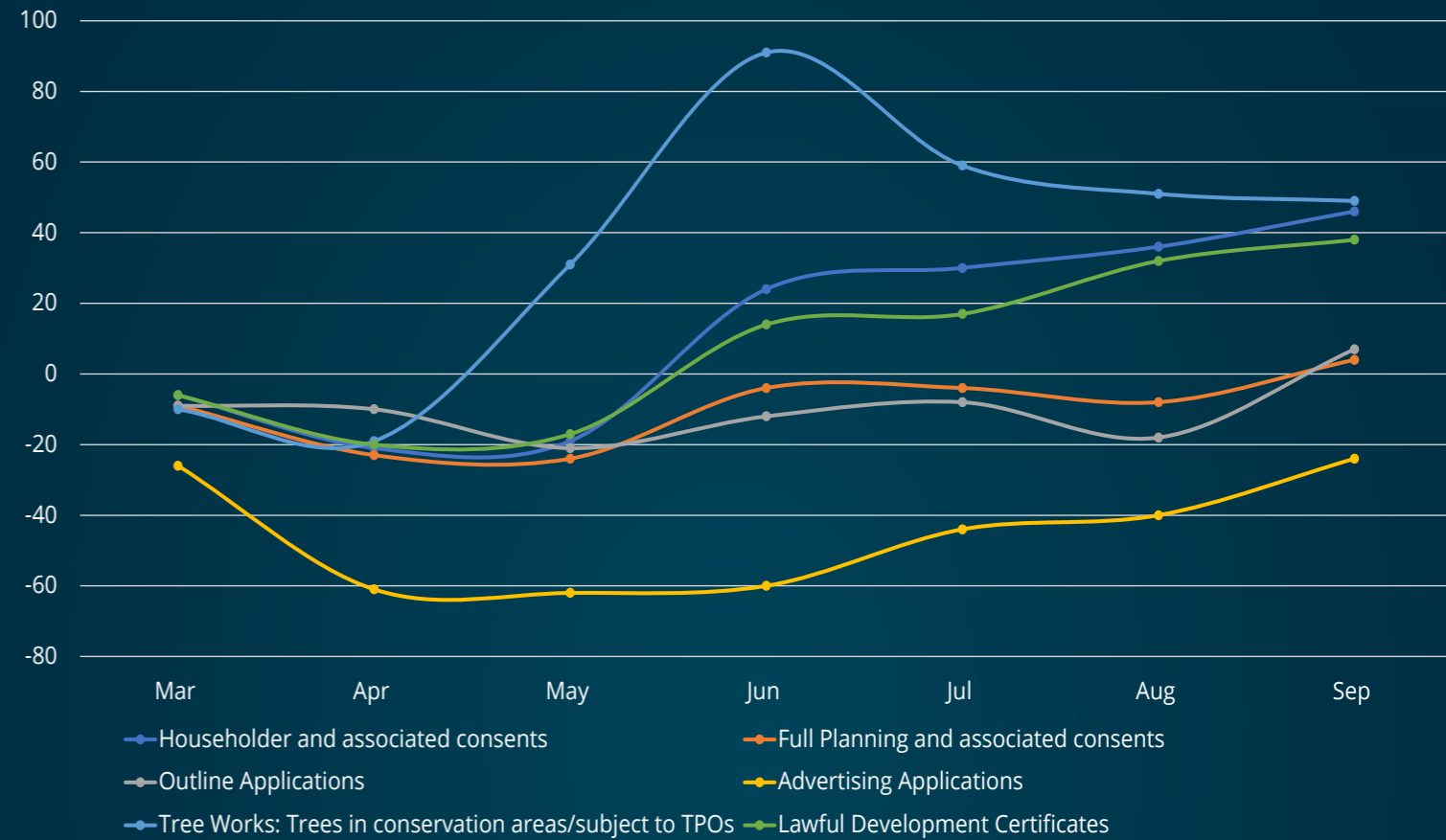
The table of applications by type shows the variation between the same month in 2020 and 2019, across a subset of the different planning application types. Analysing the different types of applications allows us to explore the impact of COVID-19 on different types of development.

Householder and associated consents have risen strongly since June and this trend continues in September, with applications 46% higher this month than in September 2019. Volumes of Lawful Development Certificates (LDCs) also continued to rise in September. As LDCs are often related to works to individual domestic properties, it is unsurprising that we see a similar pattern here to Householder applications and this further reinforces the buoyancy of the homeowner renovation/extension market currently.

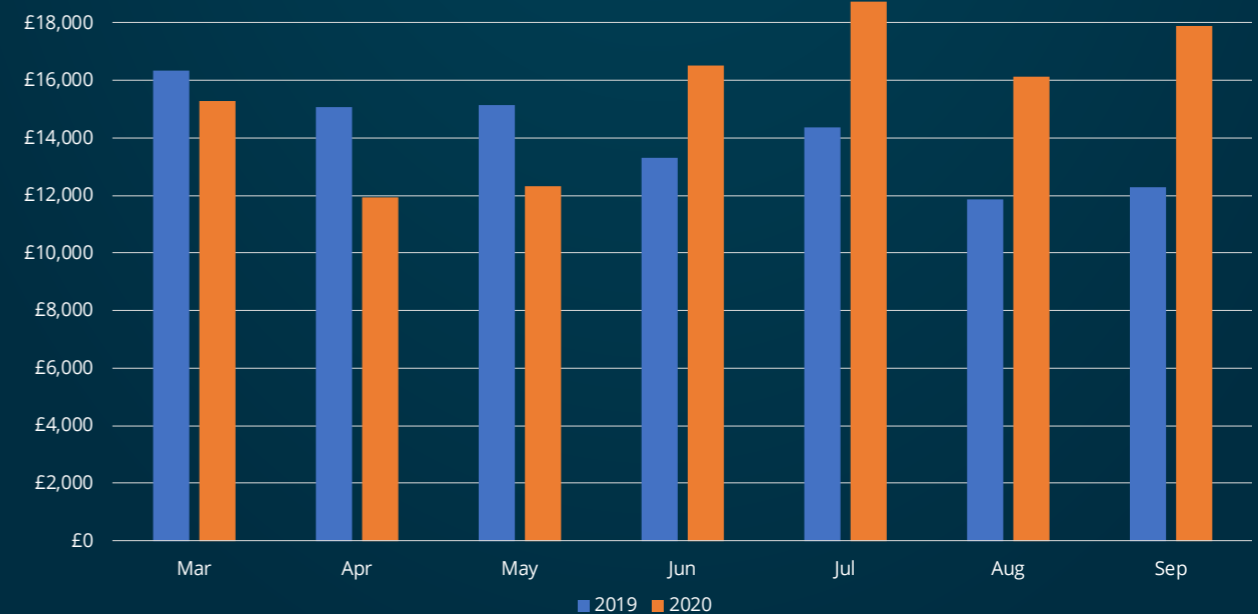
Of note this month is that Full Planning and associated consents have risen above 2019 levels for the first time since February and were 4% higher in September than the same time last year. This is particularly positive after August data showed a potential slowdown in what appeared to be a gradual recovery. Outline consents, which provide a longer-term indication of schemes, particularly larger ones also moved above 2019 levels for the first time since February. September was 7% higher than last year, a strong jump from the 18% deficit in August. It is too early to claim a full recovery at this stage, but it is promising to see the data heading in the right direction and it will continue to be monitored closely in the coming months to understand whether a new pattern is emerging.

Volumes of advertising applications also continue to improve, having been badly affected during lockdown restrictions. This is a positive sign as these applications, usually related either to advertising hoardings or more generally to shop front signage/branding, can often provide a indicator to wider economic confidence.

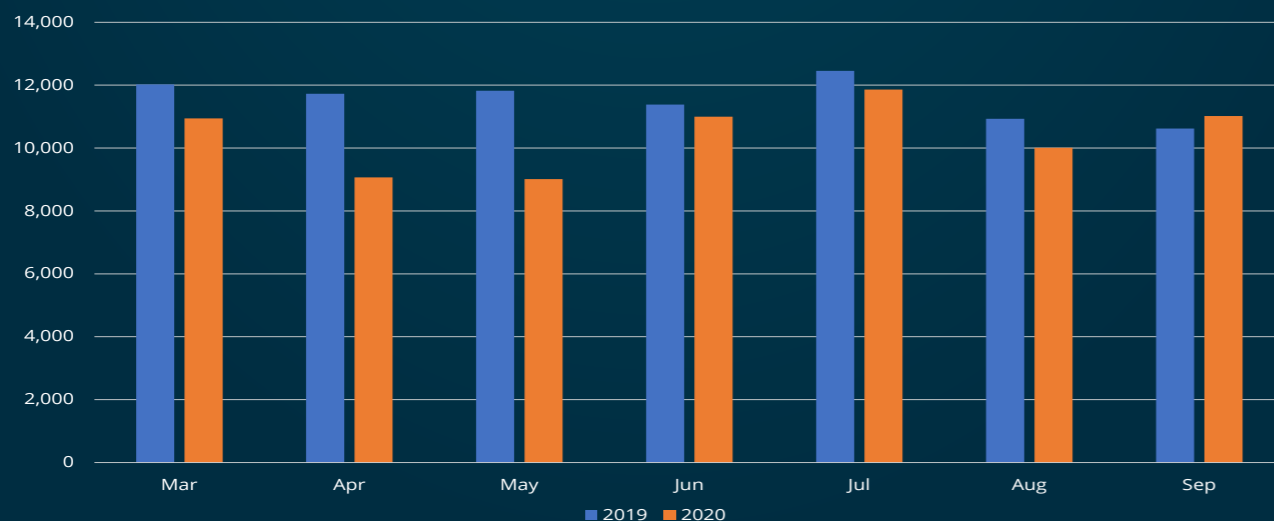
Applications by type



Householder Applications and associated consents



Full Planning Applications and associated consents



High-rise building applications submitted in 2020

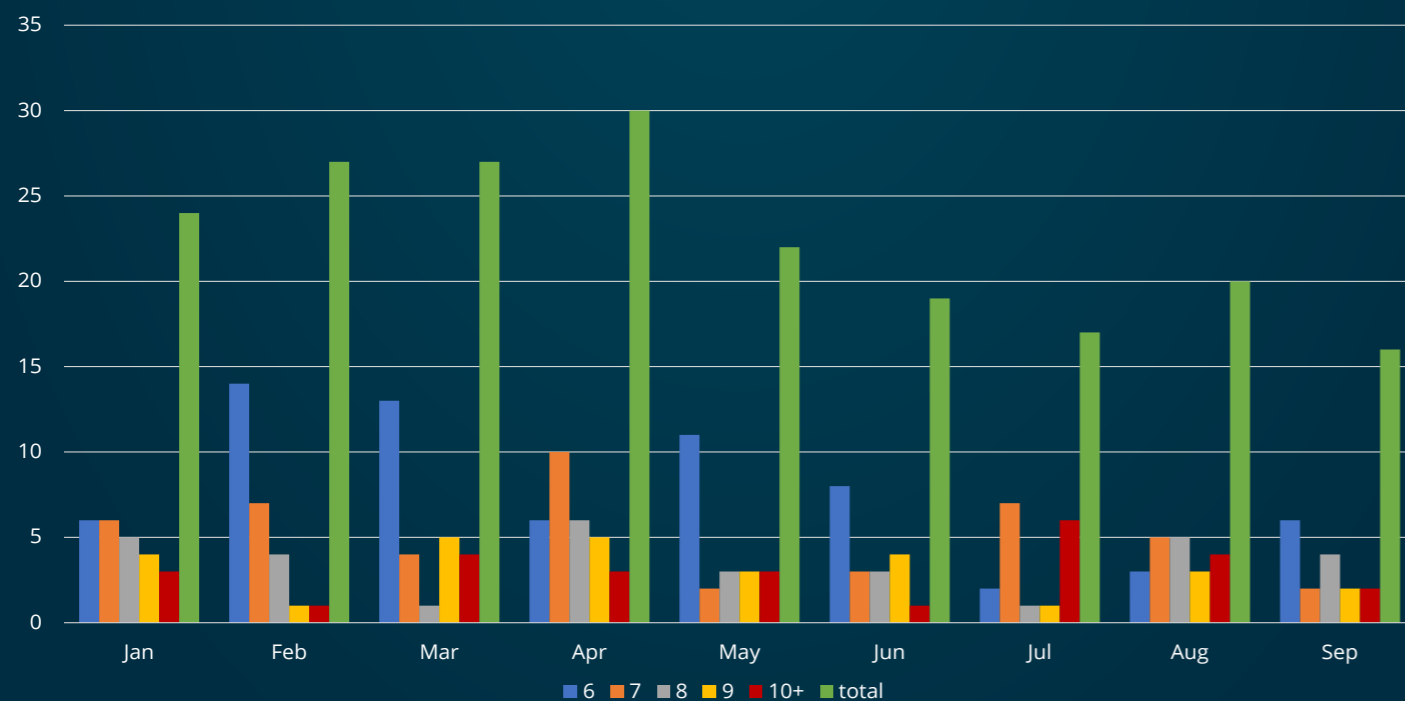
As published by government in July, the [draft building safety bill](#) will ensure that there will always be someone responsible for keeping residents safe in high rise buildings – those 18 metres and above.

Initially the high rise or 'higher-risk buildings' as they are classified will include 'new and existing residential buildings over six storeys or 18m'. However, it's expected the scope to quickly expand to include a wider range of buildings. The draft Bill gives the Secretary of State the power to define 'higher-risk buildings' – those which will be regulated by the new regime and included on a register.

In thinking about applications for new proposals over six storeys, we have collected data by reviewing the 'proposal descriptions' on submissions in 2020 by carrying out a key word search on 'Storeys'.

The data reveals that a total of 202 schemes have been identified from the search as shown below.

No. of Storeys & Applications



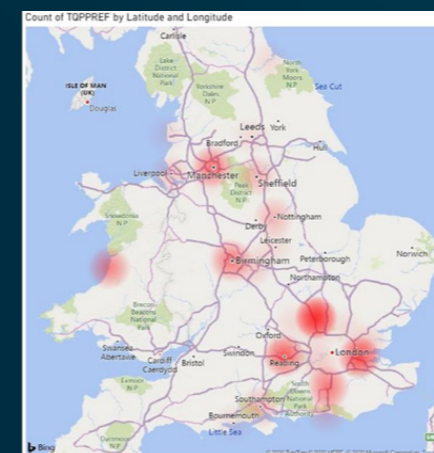
The data shows more submissions in the early four months of the year that then reduces slightly in the following months. This could be linked to the impact of COVID-19 with large developers potentially reconsidering the submission of new schemes if they have developments already in progress or nearing completion, therefore managing the workforce, build and finances.

To breakdown the data further we have captured the regional locations for each of the schemes in the graph below.

High Risk Building Applications in 2020 by Region

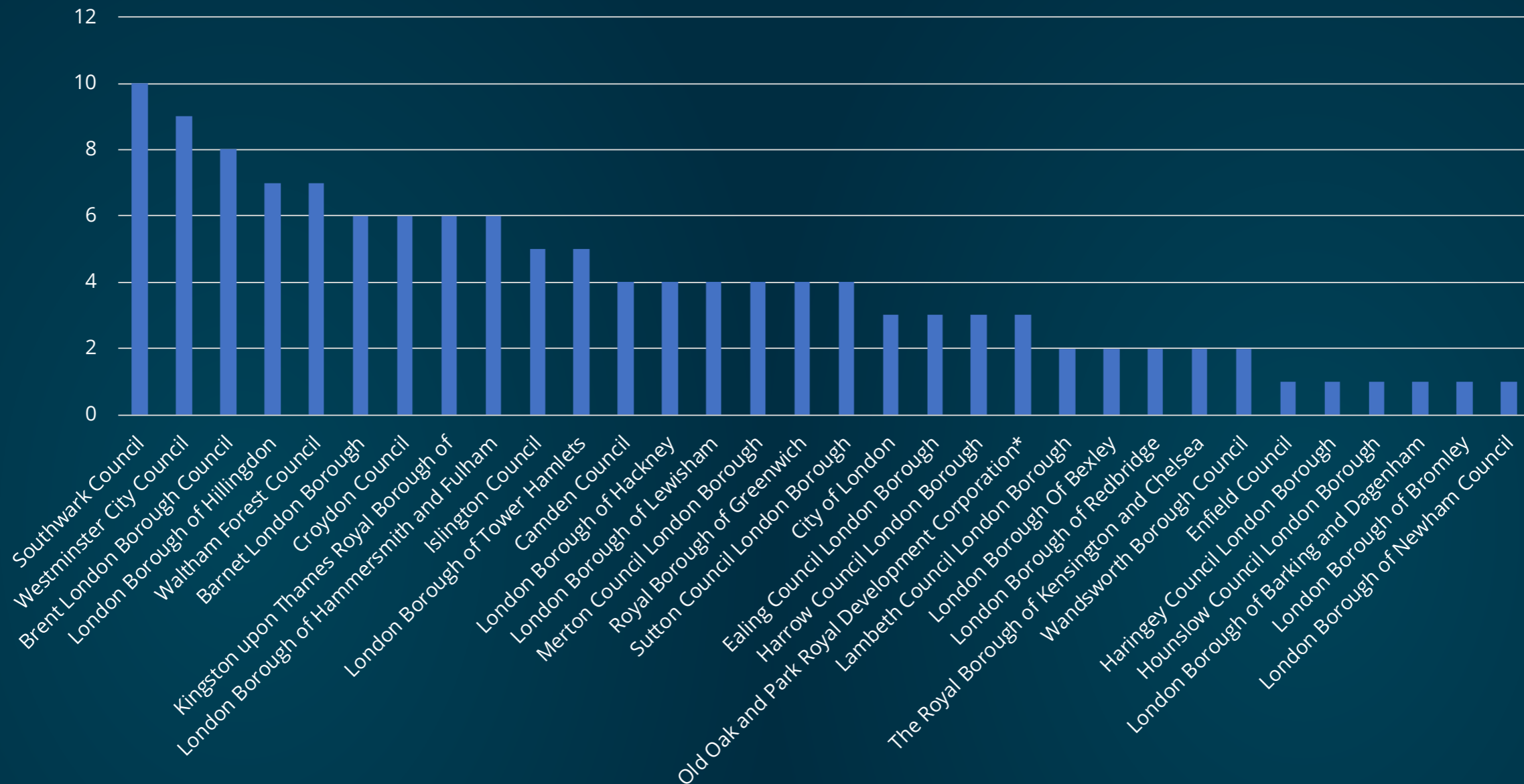


Heatmap of high-rise building applications in 2020 exc. London



Not surprisingly London has the highest number of submissions with over 60% being applied for in the capital. With 33 London Boroughs and two Development Corporations, the submissions are plotted by the Boroughs as follows in the London map.

London High-rise building applications in 2020



Have an additional data request?

The high-rise building information presents a different set of application data and shows the range and depth of planning information which exists and the insight it can provide.

If you are working on a specific research project or are seeking to understand early stage intelligence on the construction pipeline, we can help by identifying valuable trends and insight in planning and building control applications. By offering this data at the earliest possible stage – as permission is applied for – you can gain competitive advantage in your business planning decisions, whether it be a one-off requirement or something that you want to monitor change over a longer-period.

To learn more about what is available or discuss any thought-leadership you are working on, please get in touch at communications@planningportal.co.uk.

Planning application fees

One of the main concerns for Local Planning Authorities in relation to the impact of COVID-19 is the potentially significant reduction in fee income from planning applications if major scheme volumes fall.

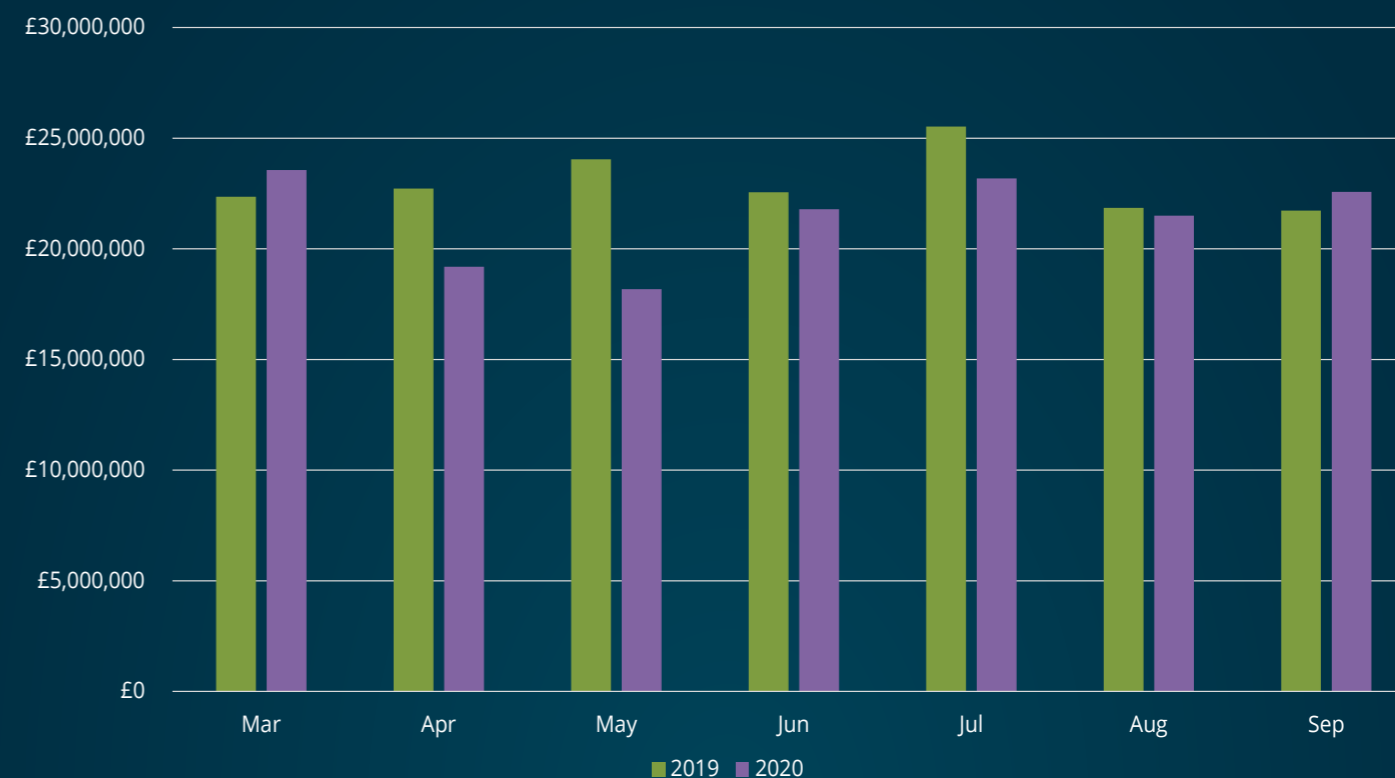
The fees table shows that whilst March 2020 saw an increase in fees of 5.4% on March 2019, April and May were hit hard with a combined loss of £9.3M of planning fee income in England.

Even as submission figures have risen since June, fee income continues to be down on 2019 as the proportion of Householder and associated consents which attract a lower fee has risen. Larger schemes cross-subsidise the smaller, high volume applications and therefore are a key income stream to sustain planning departments. This has meant that workload has increased for Local Planning Authorities, but income hasn't.

As the larger schemes have started to come through again in September, we can see that fee income is rising again. However, as detailed elsewhere in the report, application submissions are up by 29% on last September, whereas fee income is only up around 4%.

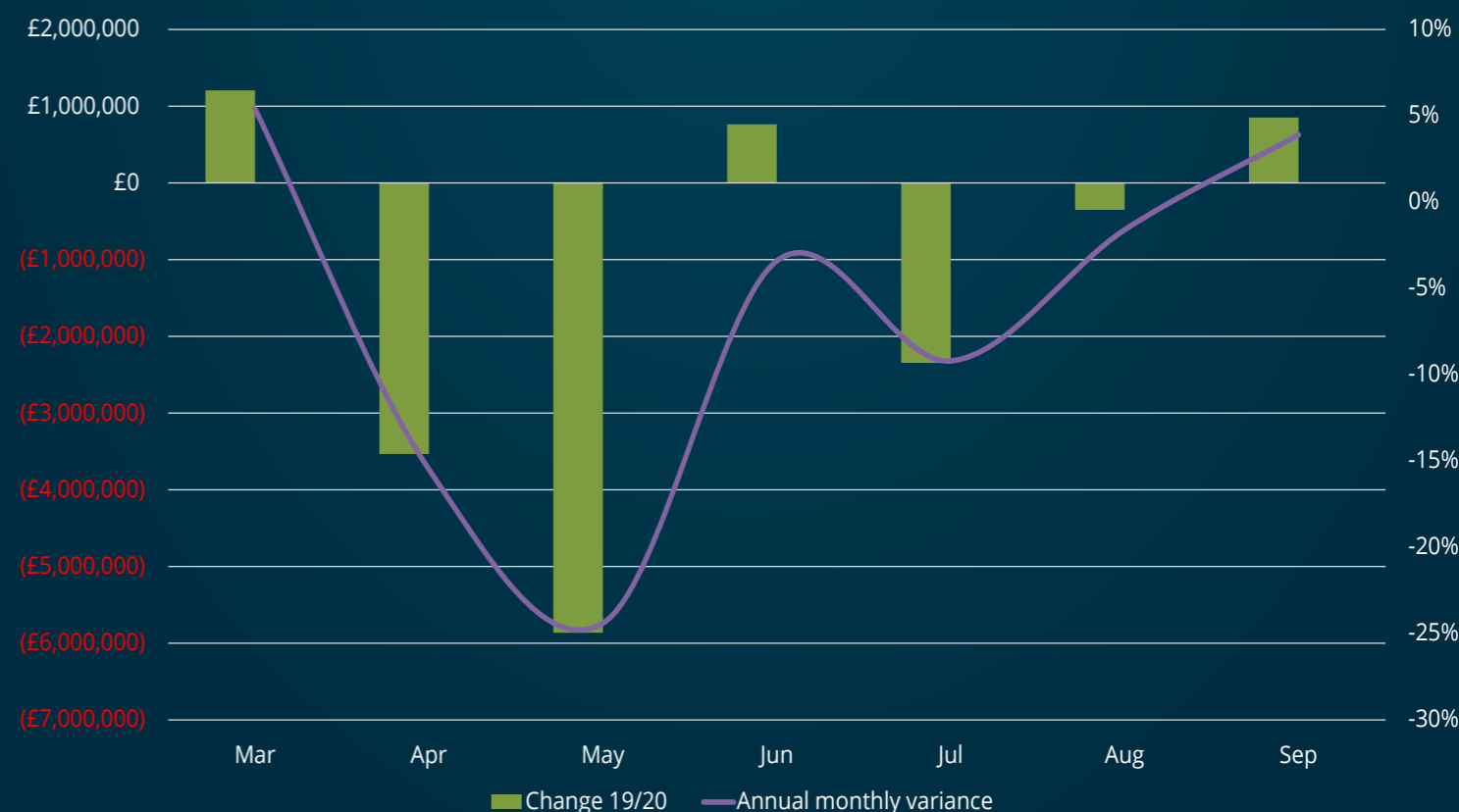
Planning fee income for online applications

2019 / 2020



Planning fee income for online applications

Change / Variance



Planning Portal: Past, present and future

Join us as we embark on a series of online events designed to show you the future of planning and showcase our proposals for the Planning Portal service.

If you are involved in the planning and construction process in England and Wales, this is a must-attend 30 minute session, once a month.

Our New Webinar:

Tuesday 10 November 2020, 12:00 - 12:30pm

[Register Here](#)

The Planning Portal Virtual Conference 2020

The [Planning Portal Virtual Conference 2020](#) hosted online from 16-19 November, has received superb support from planning consultants, architects, builders, developers, LPAs and other public sector bodies and was sold out 6 weeks in advance!

However, we are pleased to announce that we have secured an extended license for an additional 100 delegate places, so [register now](#) to avoid disappointment. By attending you will also receive 12+ hours of CPD accredited content.

The conference is bringing together key industry figures and thought leaders to discuss the most pertinent topics impacting planning and building today. The agenda includes topics on Government's 'Planning for the Future' white paper and planning reform, the Environment Bill and biodiversity net gain, Building standards and the fire safety bill and what this means for planning, technology in the development management process including future developments coming from Planning Portal, and finally wider technology in the planning process.

Last month we announced Joanna Averley, MHCLG'S new Chief Planner, as the opening keynote speaker, and we can now welcome key speakers from MHCLG, HSE, DEFRA, LABC, CIEEM, RTPI, Planning Officers Society and also speakers from our key partners and sponsors; Objective Trapeze, Esri, Plumis, GRAMM Barriers, Arcus, Castle Surveys, and DEF Software.

There will be multiple options to interact with all attendees, exhibitors and speakers for networking opportunities, and live interactions held through polls and Q&A sessions.

[Register Here](#)



What's coming in next month's edition?

We hope that the information provided in this edition gives a comprehensive insight into the planning data captured by the Planning Portal on a national, regional and local basis, and across the different types of applications submitted.

Each month we will feature a different topic of interest, but we always welcome your views on what's of interest to you, your company or general information on planning and construction matters.

If you are working on a specific research project or are seeking to understand early stage intelligence on the construction pipeline, we can help by identifying valuable trends and insight in planning and building control applications. By offering this data at the earliest possible stage – as permission is applied for – you can gain competitive advantage in your business planning decisions, whether it be a one-off requirement or something that you want to monitor change over a longer-period.

To learn more about what is available or to register your interest in subscribing, please get in touch at communications@planningportal.co.uk.

In next month's edition we are going to take a more in-depth look at who's submitting applications in terms of applicants or professional agents, and a breakdown across the different types of application.



Sponsorship opportunities

Does your consultancy or practice invest resources into producing thought leadership content, opinion pieces, reports and industry commentary based on application trends?

If so, then our sponsorship options could be right for you.

- Put your brand at the forefront of planning data.
- Featured advert in each report, the front page is available to Founder Members.
- Guest contribution to the foreword, provide data summaries or a dedicated focussed analysis on a development type 'or sector'.
- Sponsored thought leaders section and included on Planning Portal website and social media.
- Your articles, reports, opinion pieces and research featured in each report.

Get in touch,
email communications@planningportal.co.uk

Planning Market Insight Report from the Planning Portal

**This report is provided for free on behalf of
the Planning Portal and TerraQuest**

To keep receiving our monthly updates, you must
activate your free registration.

[Register Now](#)

October 2020: Planning Market Insight Report

