

Planning Market Insight Report from the Planning Portal



January 2021
Planning Market Insight Report

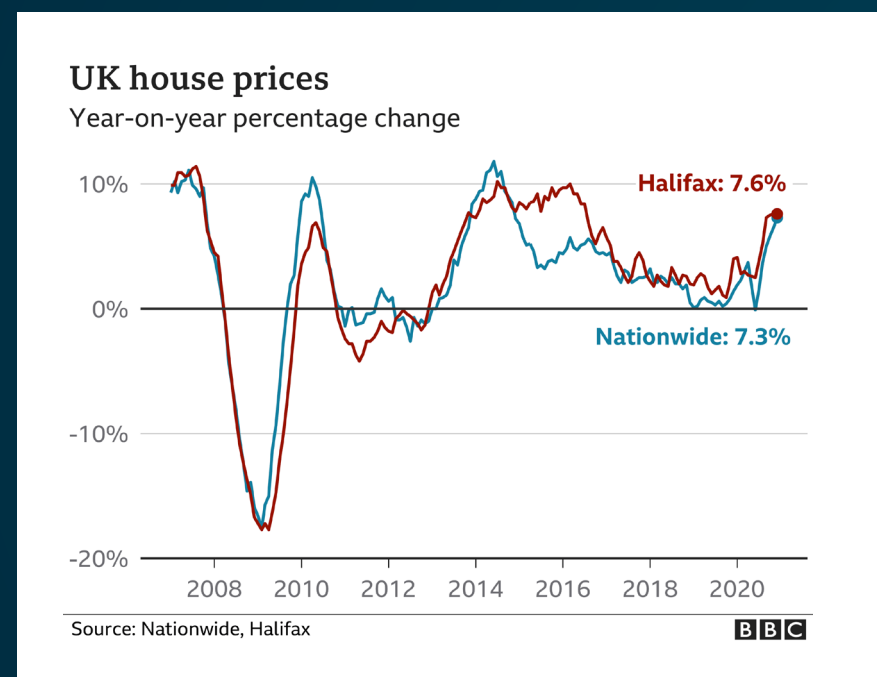


Welcome to our latest Planning Market Insight Report.

We have all been bombarded with major news over the last couple of weeks, with the latest COVID-19 restrictions being implemented and the UK departing from the EU, so we thought we would take the opportunity to reflect on some of the more positive aspects of 2020 and focus on the future.

2020 saw the largest number of planning applications submitted in recent years, despite the standstill period of lockdown seen from March to July. Growth was particularly strong for home improvement-related applications: Householder and related consents (up 18% over the year), as well as Lawful Development Certificates (up 14%). Volumes were also high for the newer Prior Approval for Larger Home Extensions, introduced into our system in late 2019. The ongoing impact of COVID-19 and its longer-term repercussions on working practices look to have driven this increase and indications are that this will continue.

On 30 December 2020, the BBC reported that house prices had seen the highest growth in six years climbing an impressive 7.5%, which is 5.3% above the levels we were seeing in March 2020. A number of policy changes and government support have helped to stimulate these rises including the extension of the furlough scheme and the stamp duty holiday. George Franks, co-founder of London-based estate agents Radstock Property, predicts that throughout 2021, "people will continue to change their living arrangements as companies adapt their remote working policies on a more formal basis."



It has taken many years, but as of the 1 January 2021, the UK is no longer part of the EU. While this is a contentious issue, construction industry analysts have cautiously welcomed the Brexit trade agreement with the subsequent impact being regarded as broadly positive. Only 24% of construction products used in the UK are imported, but of those, two thirds come from the EU so it was important that the supply chains were not disrupted, especially with some sectors such as house building, new-building and refurbishments recovering to pre-COVID levels. As applications for larger developments have been slower to recover this year, it will continue to be essential that nothing disrupts the fragile confidence in this area of the market.

Here at the Planning Portal we are feeling hopeful for 2021 with lots of excitement to look forward to in the wider world with the Brexit deal and beginnings of the COVID vaccination programme, but also closer to home. We are in the process of re-platforming the Planning Portal planning application system, using insight from across all stakeholders to improve our service and add new features and functions. Ensure you stay up to date on our progress by [registering here](#).

In this month's report we have taken a look back at 2020 as a whole, reviewing the numbers of applications submitted as well as the impact that COVID-19 has had on submissions and the development market.

On a lighter note, there were 101 applications submitted on Christmas Day! Not only does this show great dedication by those applicants and agents, but also the availability of the Planning Portal as a key tool to get the job done. My personal thanks goes to our team and in particular our Service Desk who worked to support our customers throughout the festive period.

Enjoy this issue and we wish you a happy and prosperous New Year.

From next month, it will only be possible to receive these free Planning Market Insight Reports by subscribing to our mailing list and having them delivered straight to your inbox. You can [subscribe to our mailing list here](#).



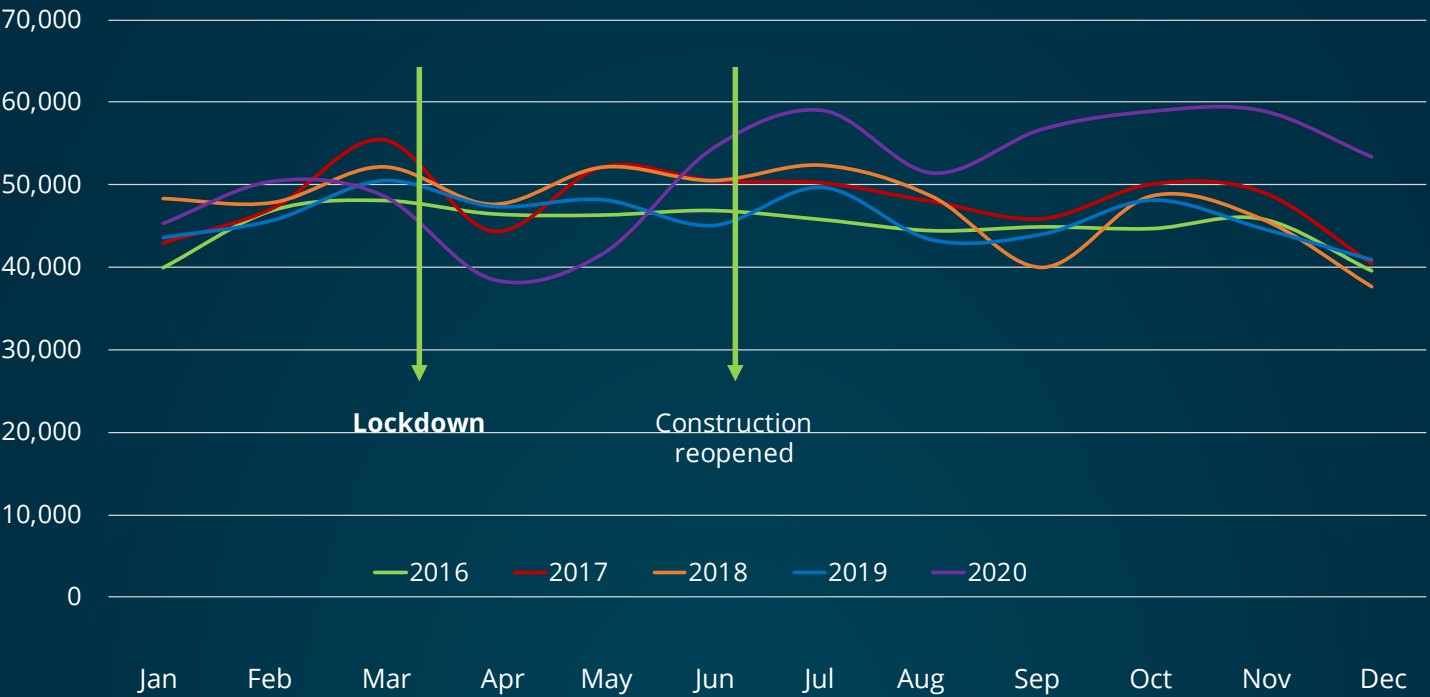
Sarah Chilcott

Managing Director – Planning Portal

*BBC source: UK house prices see highest growth in 2020
<https://www.bbc.co.uk/news/business-55483432>

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. Applications tend to have a reasonably standard seasonal pattern throughout the year, however, the graph clearly illustrates the unusual trend for 2020, showing submissions way down from March to May due to the pandemic but a very positive and unexpected upturn from June onwards.

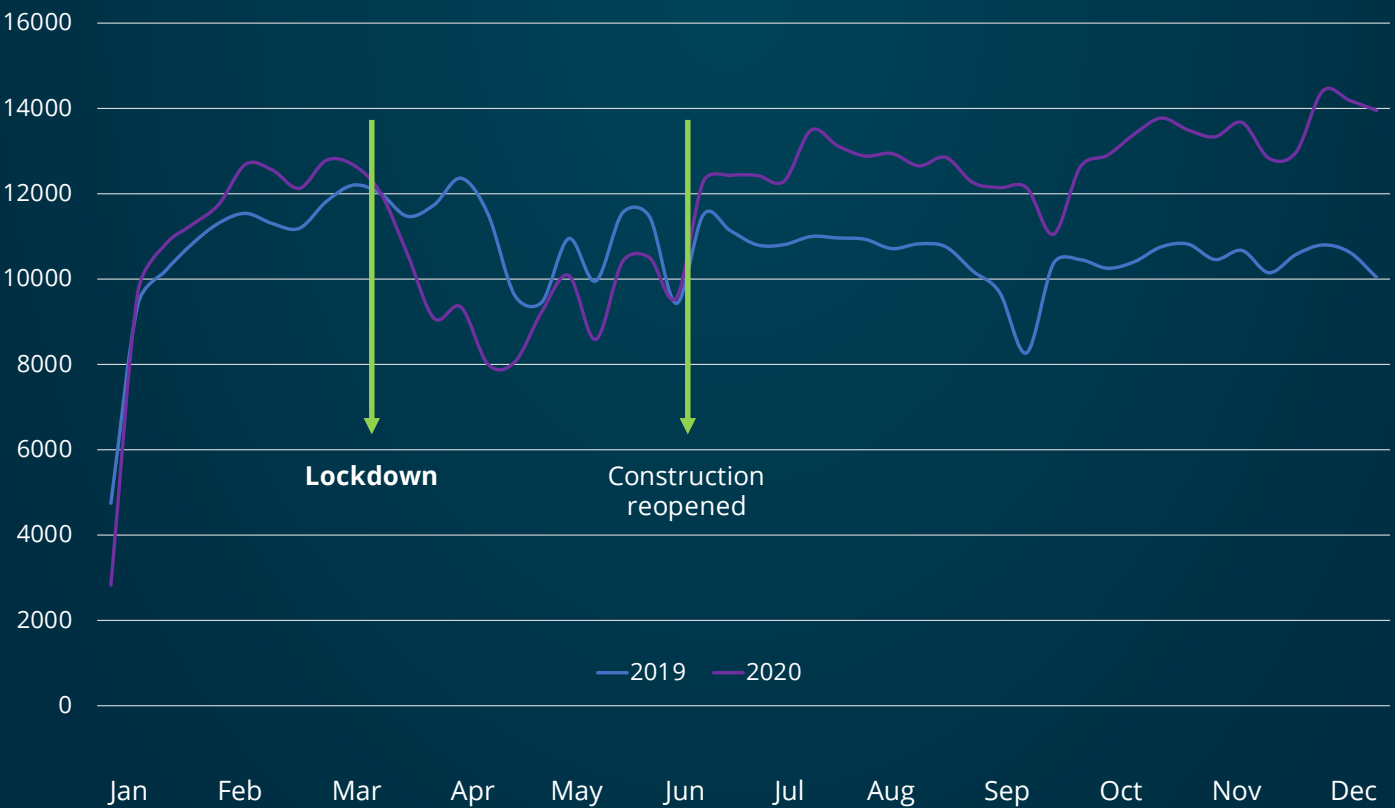
In December 53,430 applications were submitted through the Portal; this is a decrease of 10% compared to the previous month's total. However, when compared to December 2019's total of 40,835 this was another big increase of 31%. Amazingly this is whopping 12,595 additional applications! Looking at December against earlier years, this gap increase is even greater.

Overall in 2020, it has been very surprising to see the increase in total submission numbers following the lockdown in March. Prior to 2020 the highest number of

submissions recorded in a single month was 55,535 in March 2017. This has been exceeded in four of the last six months of 2020 as per the table below, with both June and December getting very close too.

Month 2020	Total submissions
Jun	54,421
Jul	59,062
Aug	51,458
Sep	56,778
Oct	58,963
Nov	59,044
Dec	53,430

National graph by week



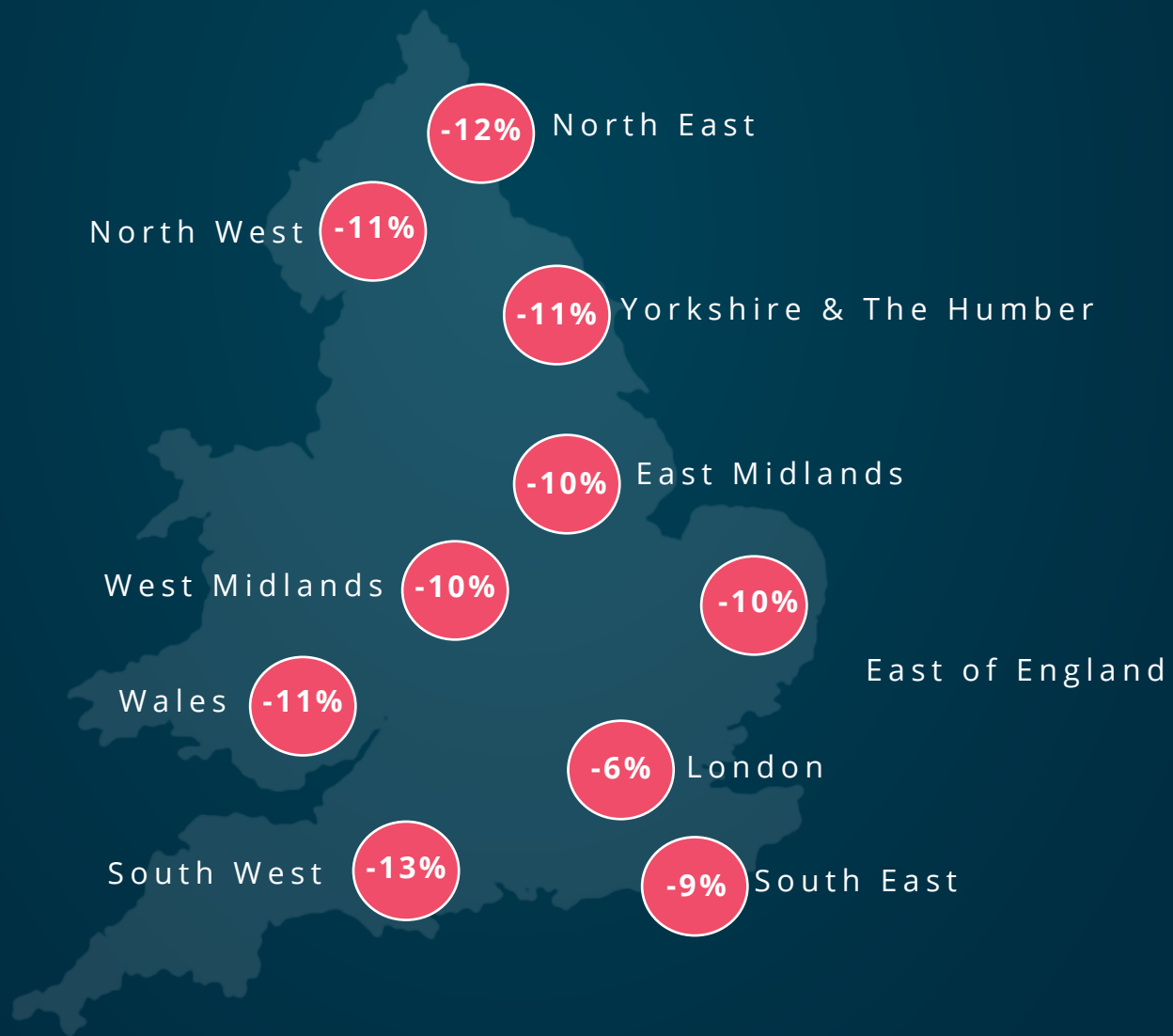
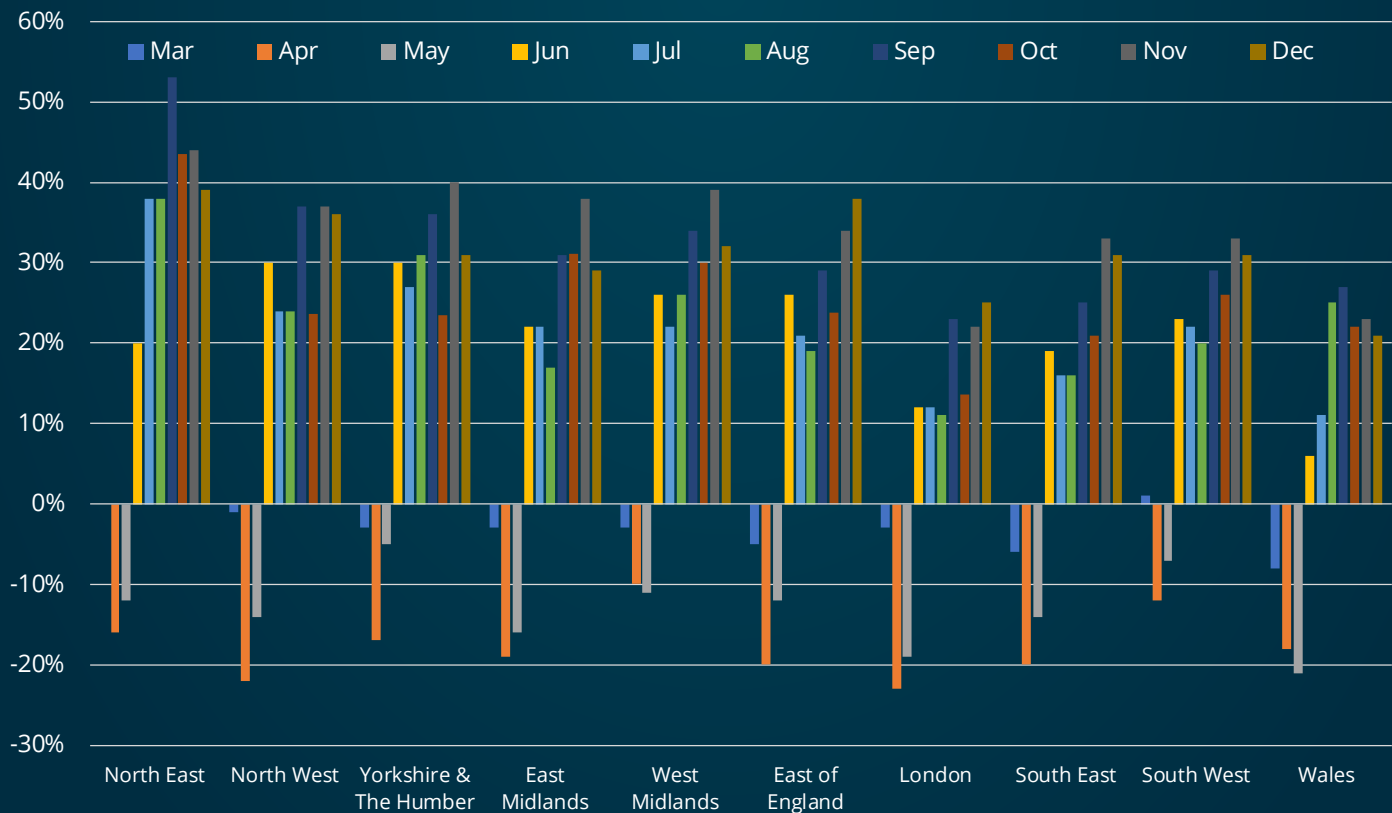
The regional view

As we would expect to see in December, the month-on-month variations in the number of applications submitted were on average 10% lower than November across the entire region. There are many factors that may have impacted this trend, including the number of public holidays throughout December and the typical national slow down towards the Christmas break, however, as mentioned above, we do still see applications submitted on Christmas day!

When we compare the regional variations between 2019 and 2020, it provides a more positive outlook with all regions showing a year-on-year increase. Development appetite appears to have increased across the north of England with the regions here showing the greatest year-on-year increases: the North East at 21% above 2019 and Yorkshire & the Humber at 17% above. It will be interesting to see how these plans play out across 2021 and if these proposed developments further stimulate growth across the regions.

We have to be mindful, however, of the urban distribution of the regions. London has seen a 7% increase on 2019's figures, but when you look at these numbers in real terms, the levels of actual submissions are still far greater. The total number of applications in London throughout 2020 totalled 121,559 while the North East saw a total of 14,107. The bar chart demonstrates the percentage above/below 2019 volumes for each English region and in Wales between March and December 2020.

Regional percentage change



The map shows the percentage change in applications by region from November to December 2020.

Local Planning Authorities:

Who has received the biggest change in application submissions in 2020?

We know that the pandemic has affected everyone differently and all regions across England and Wales have been heavily impacted. It does not make great reading that the UK has the highest recorded death rate in Europe, having sadly lost nearly 80,000 citizens* due to COVID-19.

In this year like no other, we have taken a look back at online application submissions in 2020 and compared this to 2019 to see which Local Authorities have experienced the greatest change – both positive and negative.

On a more encouraging note, the major change to home working for many people has led to greater use and take-up of online services – notably our planning application service, which has remained a constant and valuable resource throughout. During this difficult time, we have supported all customers, helping Local Authorities in their transition to home working and continuing to provide business as usual in an effective and efficient digital way. We have also remained available to all applicants and agents for both the provision of planning and building control information and guidance, but equally the online provision of planning and building control application services – ensuring no interruption or delays within this process. To make matters more challenging, it was also at a time where we have seen new policy changes introduced involving updates to content and services.

What has been great throughout is that we have witnessed first-hand everyone pulling together and showing excellent collaboration to keep planning, building and the economy moving forwards in order to get the job done.

Top 15 Local Authorities by number of online applications received in 2020

LPA	Region	Nov-19	Nov-20	% (+/-)	Dec-19	Dec-20	% (+/-)	Total 2019	Total 2020	% (+/-)
Cornwall Council	South West	559	765	37%	525	650	24%	6,193	7,844	27%
Leeds City Council	Yorkshire & The Humber	500	688	38%	441	627	42%	6,100	7,271	19%
Westminster City Council	London	699	601	-14%	644	563	-13%	8,138	6,906	-15%
Birmingham City Council	West Midlands	428	569	33%	442	548	24%	5,644	6,606	17%
London Borough of Barnet	London	475	613	29%	472	587	24%	5,802	6,545	13%
Wiltshire Council	South West	461	620	34%	365	573	57%	5,499	6,282	14%
Dorset Council	South West	446	586	31%	399	496	24%	5,563	6,209	12%
Croydon Council	London	382	461	21%	358	426	19%	4,630	5,218	13%
Bristol City Council	South West	341	468	37%	351	447	27%	4,532	5,090	12%
Cheshire East Council	North West	362	463	28%	340	425	25%	4,526	4,837	7%
London Borough of Bromley	London	366	471	29%	321	468	46%	4,477	4,833	8%
London Borough of Ealing	London	308	388	26%	311	422	36%	4,124	4,643	13%
Bournemouth, Christchurch & Poole Council	South West	322	456	42%	256	364	42%	3,803	4,627	22%
London Borough of Richmond upon Thames	London	373	421	13%	291	403	38%	4,246	4,501	6%
London Borough of Wandsworth	London	413	447	8%	354	396	12%	4,538	4,459	-2%

Local Planning Authorities

The table shows that 13 of the 15 Local Planning Authorities (LPAs) receiving the most online applications via the Planning Portal have seen an increase in submissions when measured against 2019. This is not surprising given the government lockdown that led to a stronger endorsement from authorities to encourage applicants to submit online, delivering a channel shift in engagement and submission.

Two of the largest increases have been at Cornwall Council, which now tops the list, and the relatively new Bournemouth, Christchurch & Poole Council (BCP Council) with 27% and 22% respectively. Both these authorities have been affected by Local Government Reviews to form larger unitary authorities, Cornwall merging some time ago in April 2009 whilst BCP Council more recently in April 2019. With the split of Dorset into two unitaries, Dorset Council is listed in 7th place and achieved a 12% increase.

The two authorities with a negative percentage compared to 2019 are the London Boroughs of Westminster and Wandsworth, with -15% and -2% respectively. Westminster's applications are down by 1,232 which is quite a drop and could be due to a reduction in advertising applications (which is one of the application types most affected by the pandemic and generally make up a sizeable percentage of their applications), whilst Wandsworth's are down by only 79 applications.

Top 15 Local Authorities by highest percentage increase of online applications received in 2020

LPA	Region	Nov-19	Nov-20	% (+/-)	Dec-19	Dec-20	% (+/-)	Total 2019	Total 2020	% (+/-)
St Helens Council	North West	52	80	54%	37	58	57%	409	770	88%
North York Moors National Park	Yorkshire & The Humber	19	35	84%	29	46	59%	325	534	64%
Halton Borough Council	North West	35	45	29%	31	42	35%	324	523	61%
Harlow Council	East of England	26	54	108%	27	38	41%	369	569	54%
Wigan Council	North West	107	132	23%	98	111	13%	1,045	1,575	51%
South Tyneside MBC	North East	37	57	54%	25	48	92%	384	567	48%
Shropshire Council	West Midlands	293	346	18%	233	340	46%	2,786	3,964	42%
Eden District Council	North West	25	44	76%	27	48	78%	335	475	42%
London Borough of Barking & Dagenham	London	88	173	97%	117	172	47%	1,281	1,798	40%
Bridgend County Borough Council	Wales	41	80	95%	33	45	36%	504	699	39%
Burnley Borough Council	North West	31	38	23%	23	18	-22%	273	378	38%
Knowsley MBC	North West	27	38	41%	32	59	84%	431	591	37%
Borough of Broxbourne Council	East of England	70	97	39%	52	99	90%	746	1,005	35%
South Staffordshire Council	West Midlands	60	88	47%	75	77	3%	716	960	34%
Torridge District Council	South West	52	86	65%	58	76	31%	651	871	34%

The table details the Local Authorities with the highest online application percentage increase in 2020 when compared to 2019. This list shows a mix of authorities across the different regions in England and includes one Welsh authority, and the yearly numbers they each receives varies quite a lot too.

Top of the list is St Helens – with a huge 88% increase, they realised almost double the number of online applications they received in 2019. They were followed by North York Moors National Park with a 64% increase and Halton with a 61% increase. The Planning Portal team worked in partnership with both St Helens and Halton in 2020 to encourage greater online submission and this has correlated in the figures. There are also other authorities in the list who have proactively worked with us to achieve an increase, including Shropshire Council who received an additional 1,178 online applications in 2020.

Local Planning Authorities

The only Welsh authority on the list is Bridgend County Borough Council who achieved a 39% increase or 195 applications. Bridgend sits on the M4 corridor so this could be attributed to increased housebuilding in the area due to its accessibility to Cardiff and Bristol since the Severn Bridge toll was removed in December 2018. Back in 2019 the Council stated that around 7,500 homes will need to be built in the county over the coming years to meet the predicted housing demand. This was declared in its replacement Local Development Plan, which estimated residential growth of 505 homes per year and employment growth of 266 jobs per year, and aimed to encourage a more youthful, skilled population base to counter-balance the ageing population, resulting in an overall population increase of 8.4% or 12,151 people over the plan period.

Top 15 Local Authorities by highest percentage decrease of online applications received in 2020

LPA	Region	Nov-19	Nov-20	% (+/-)	Dec-19	Dec-20	% (+/-)	Total 2019	Total 2020	% (+/-)
Camden Council	London	330	401	22%	324	308	-5%	4,214	4,023	-5%
Royal Borough of Kensington and Chelsea	London	355	357	1%	292	370	27%	4,285	4,036	-6%
Portsmouth City Council	South East	105	105	0%	61	96	57%	1,145	1,078	-6%
Northumberland National Park Authority	North East	8	4	-50%	4	6	50%	68	64	-6%
Snowdonia National Park	Wales	28	23	-18%	23	25	9%	316	295	-7%
London Borough of Hackney	London	239	441	85%	254	259	2%	3,559	3,304	-7%
Blaenau Gwent County Borough Council	Wales	11	25	127%	15	17	13%	206	191	-7%
Isle of Anglesey County Council	Wales	50	60	20%	54	49	-9%	697	645	-7%
Allerdale Borough Council	North West	41	35	-15%	35	41	17%	465	425	-9%
Old Oak and Park Royal Devt. Corp.	London	14	4	-71%	14	22	57%	160	143	-11%
Carlisle City Council	North West	47	46	-2%	42	36	-14%	618	548	-11%
Exmoor National Park	South West	27	20	-26%	19	27	42%	261	230	-12%
London Legacy Devt. Corp.	London	58	33	-43%	35	38	9%	477	408	-14%
Westminster City Council	London	699	601	-14%	644	563	-13%	8,138	6,906	-15%
City of London	London	78	82	5%	100	54	-46%	1,070	797	-26%

The table includes some Local Planning Authorities that do not receive high numbers of applications, mainly London Development Corporations who have a specific remit and National Park Authorities that play a prominent role in the protection of the natural and built environment.

There are a few central London Boroughs in the list that have main commercial and retail areas and are tourism hotspots for sightseeing and events, receiving visitors from across the globe. Therefore, we would expect to see fewer applications from hospitality and retail businesses during 2020 due to the lockdown restrictions imposed on holidays and travel, and fewer workers due to employees working from home or being placed on furlough.

There are a couple of other coastal councils in England and Wales listed which may be facing similar issues due to a loss of tourism in these exceptional circumstances.

Applications by type

Those who have followed the monthly reports will not be surprised to see that in the summary of 2020 applications by type as compared to 2019, Householder applications are the stand-out consent type.

The headline for the year was that growth in application numbers following the spring lockdown was largely driven by home improvements by individual homeowners. Applications from homeowners are usually submitted on Householder 'forms' which cover most typical home improvement projects. Lawful Development Certificate (LDC) applications for both existing and proposed works can also be submitted where planning permission isn't required, to give the homeowner peace of mind and to prove planning permission wasn't needed at the time the work was carried out. Finally, the government also introduced a 'fast track' route for specific types of extension, which is covered using the 'Prior Approval: Larger Home Extension' form, introduced into our service in late 2019.

Householder and LDCs were two of the strongest performing application types over the year as compared to 2019. Following the sharp decline in April and May, they recovered strongly and have continued to grow over the remaining months: overall, they were up 18% and 14% respectively across the 12-month period. Prior Approvals for Larger Home Extensions can't be compared to 2019 as they were only introduced towards the end of the year, but they have already proven popular with nearly 17,000 submitted in 2020. Of the 16 new Prior Approvals added in late 2019, this one type accounts for around 70% of the total volume.

Application Type	Mar +/-	Apr +/-	May +/-	Jun +/-	Jul +/-	Aug +/-	Sep +/-	Oct +/-	Nov +/-	Dec +/-	Total +/- 2020 vs 2019
Householder and associated consents	-6%	-21%	-19%	+24%	+30%	+36%	+46%	+43%	+51%	+53%	+18%
Full Planning and associated consents	-9%	-23%	-24%	-4%	-4%	-8%	+4%	0%	+4%	+12%	-5%
Outline applications	-9%	-10%	-21%	-12%	-8%	-18%	+7%	-5%	+4%	+1%	-8%
Advertising applications	-26%	-61%	-62%	-60%	-44%	-40%	-24%	-36%	-35%	-26%	-34%
Prior Approval: Development by Telecomms Operators	+560%	+939%	+104%	+1837%	+1456%	+851%	+300%	+151%	+296%	+259%	+378%
Tree works: Trees in conservation areas/subject to TPOs	-10%	-19%	+31%	+91%	+59%	+51%	+49%	+43%	+55%	+50%	+36%
Lawful Development Certificate	-6%	-20%	-17%	+14%	+17%	+32%	+38%	+32%	+44%	+44%	+14%

Larger schemes and consents related to advertisements have been slower to recover and overall applications volumes in 2020 were lower than in 2019. Larger schemes are usually submitted on Full Planning 'forms', though this consent type is also used for a variety of other works, including change of use. Following the sharp contraction in April and May, numbers of Full Planning applications and related consents were slower to recover and in fact only surpassed 2019 figures in September, November and December. Over the 12-month period, there were 5% fewer Full Planning applications, which is 6,686 fewer applications of this type than in 2019.

Applications by type

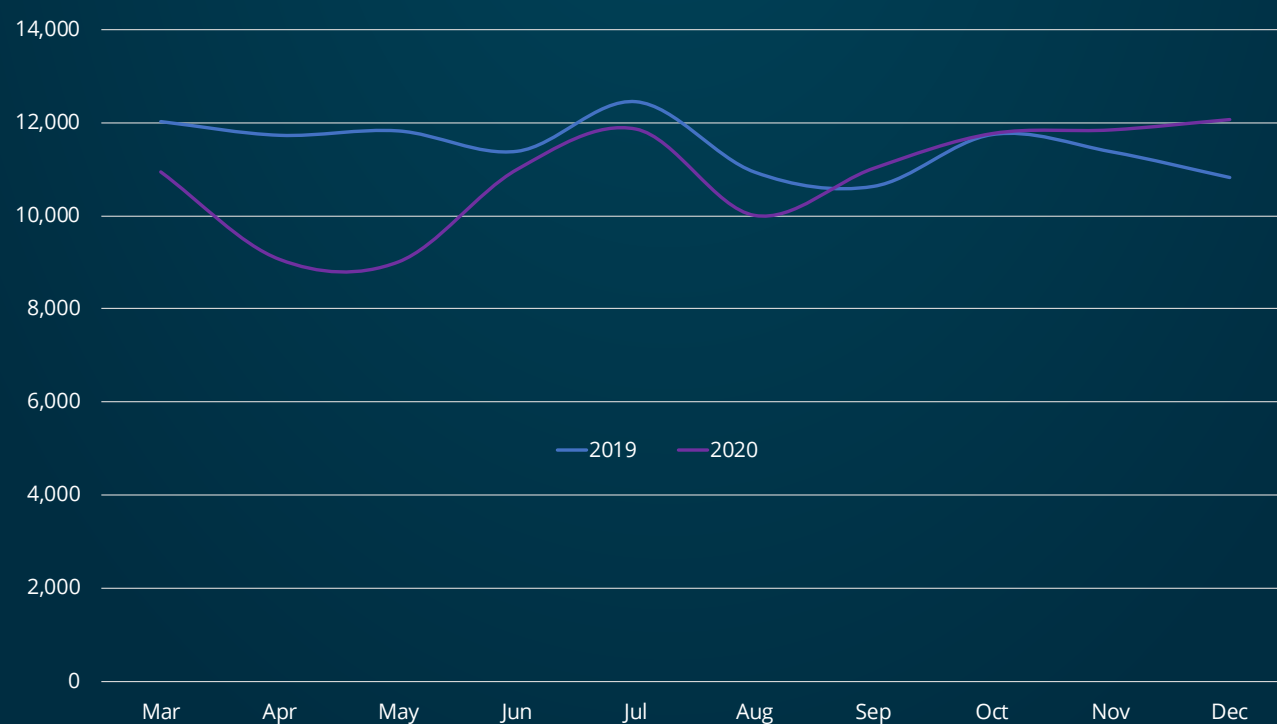
Typically, we also look at Outline consents as an indicator of longer-term confidence in larger developments. This is because larger schemes often apply for Outline consent and then, if successful, progress with the more detailed and costly work needed to provide the information required for a Full application. These were similarly affected in 2020, rising above 2019 volumes only in September, November and December too. Over the 12-month period, there were 8% (520) fewer applications.

Advertising consents which cover billboards and outside advertising, as well as shop signage and branding, have been particularly affected as retail remained closed for much of the year and the impact on the wider economy was significant. Each month, the volume of this type of application was lower than in 2019, ending the year down 34% overall, which is 6,234 fewer applications.

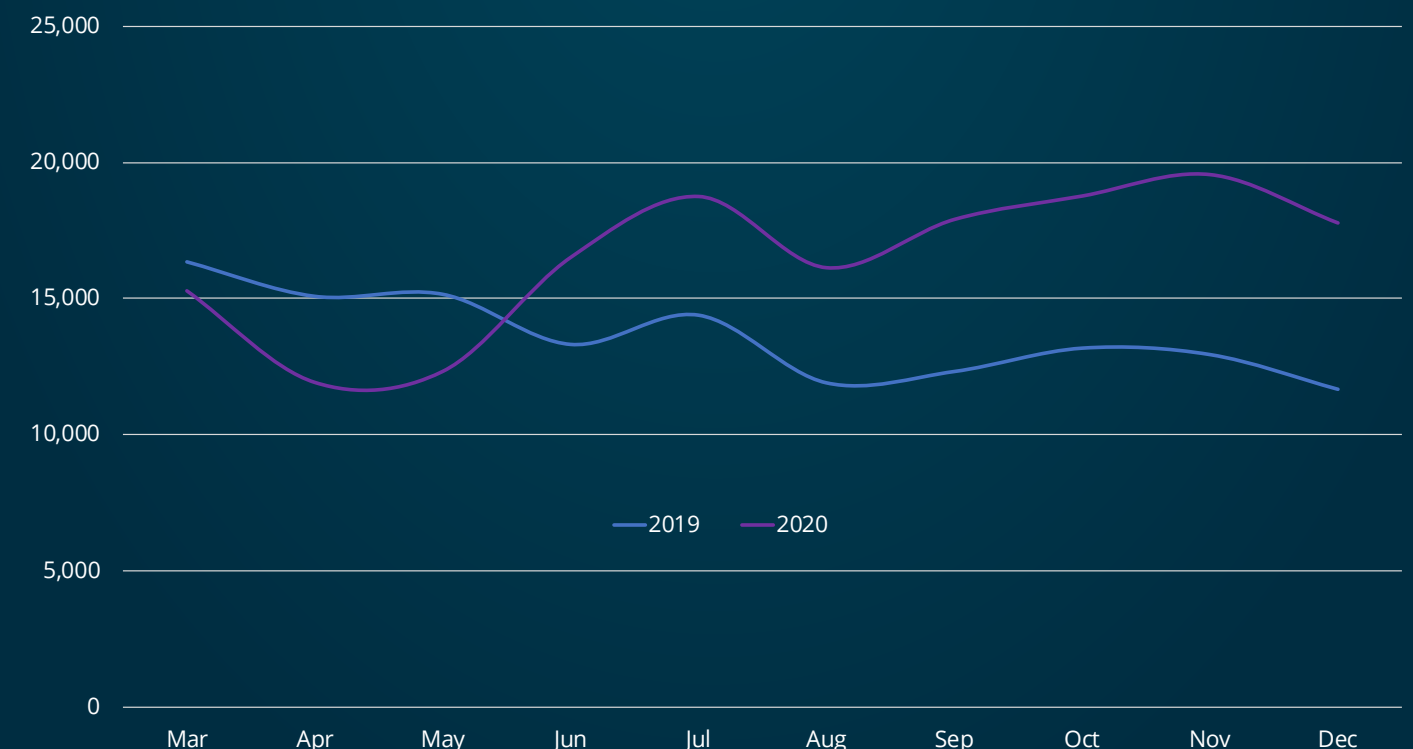
Two other application types stand out for the higher volumes submitted during 2020, Prior Approval: Development by Telecoms Operators and Works to Trees. Both of these consent types saw their typical seasonal patterns disrupted by the lockdown in spring, but the volumes submitted overall are unlikely to have been driven specifically by COVID-19. In the case of telecoms applications specifically, we can see that these are related to roll-out of infrastructure in support of government ambitions to improve connectivity; something already publicised pre-lockdown.

Across the board, it is also worth noting that the rise in volumes between 2019 and 2020 is in part due to changes in behaviour of those agents and applicants submitting, with more applications now being submitted online instead of on paper. Just before Christmas, the government released the latest PS1 data, which shows the number of valid applications received by Local Authorities between 1 July and 30 September 2019. This is a slightly different dataset to ours, which shows applications submitted to Local Authorities, as well as some consent types excluded from the PS1 data, such as Works to Trees. However, whilst the PS1 data saw volumes of applications flat as compared to the same period in 2019, online applications submitted increased by 22% over the same period, indicating a clear shift in behaviour. This is perhaps unsurprising as we have seen almost every aspect of our lives move online during this pandemic.

Full Planning Applications and associated consents



Householder Applications and associated consents



Planning application fees in 2019 vs 2020

December 2020 broke into the £30M bracket for a single month and realised fees of c.£35.5M, which was up 17% on December 2019's total of c.£27.8M. This positive upward trend for application fee income builds upon the slight increase achieved in November when compared to 2019, but also reflects 2019 where December was the highest month for receipt of fees.

This correlates with the application type data this month where Full Planning and Outline applications are up 12% and 1% respectively, and could be related to some larger schemes with higher fees having a year-end deadline to meet or a slight bounce due to a Brexit deal being agreed and confidence that the 'no deal' option was removed.

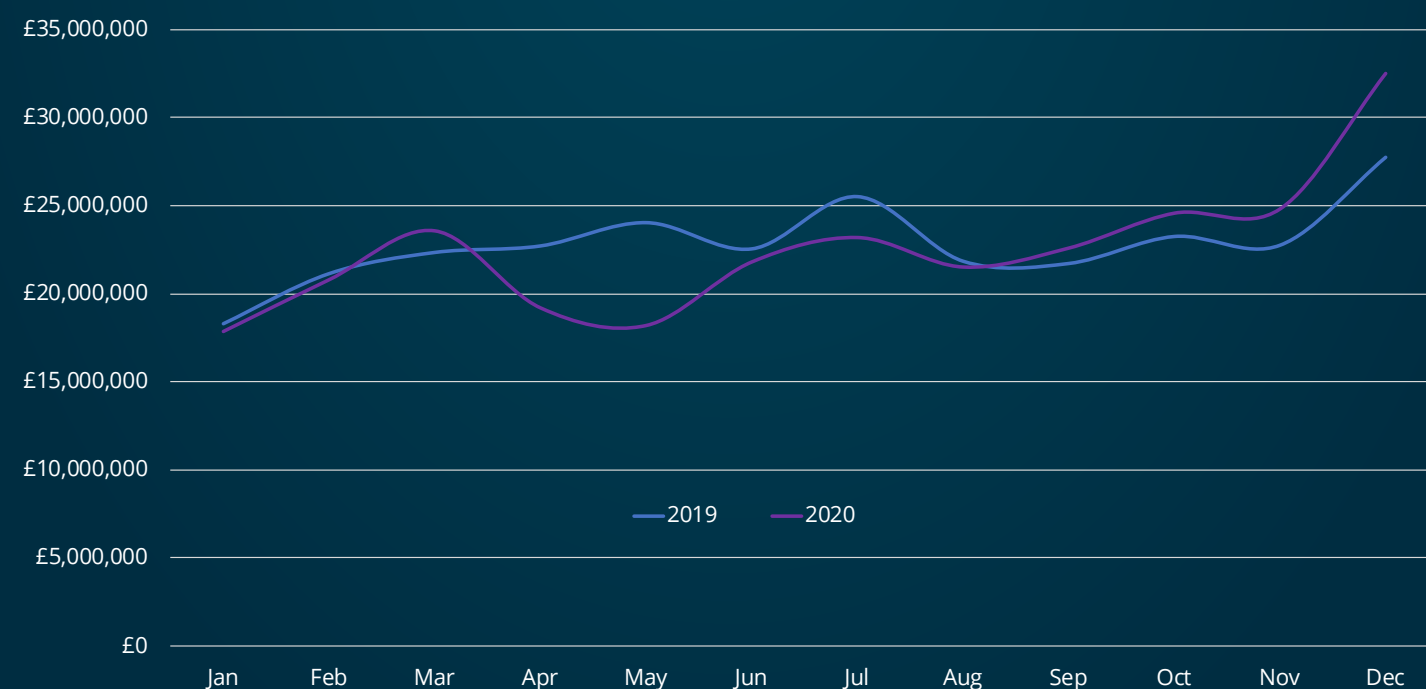
Overall in 2020, fees were slightly down year-on-year when compared to 2019 by 1.3% or £3.5M. As reported earlier in the report, Householder applications are up massively since the spring but the larger schemes have been slower to recover as the COVID-19 pandemic and availability of a vaccine to all to lift restrictions may be putting plans on hold until greater certainty can be achieved to proceed.

As we move into 2021 it is difficult to predict the future of planning, building and construction but the data from the last nine months would suggest that smaller scale applications will continue to be submitted in high numbers whilst the new Brexit trade deal, vaccine rollout and extension to the government furlough scheme until April 2021 will be monitored closely to build business confidence for the larger proposal schemes.

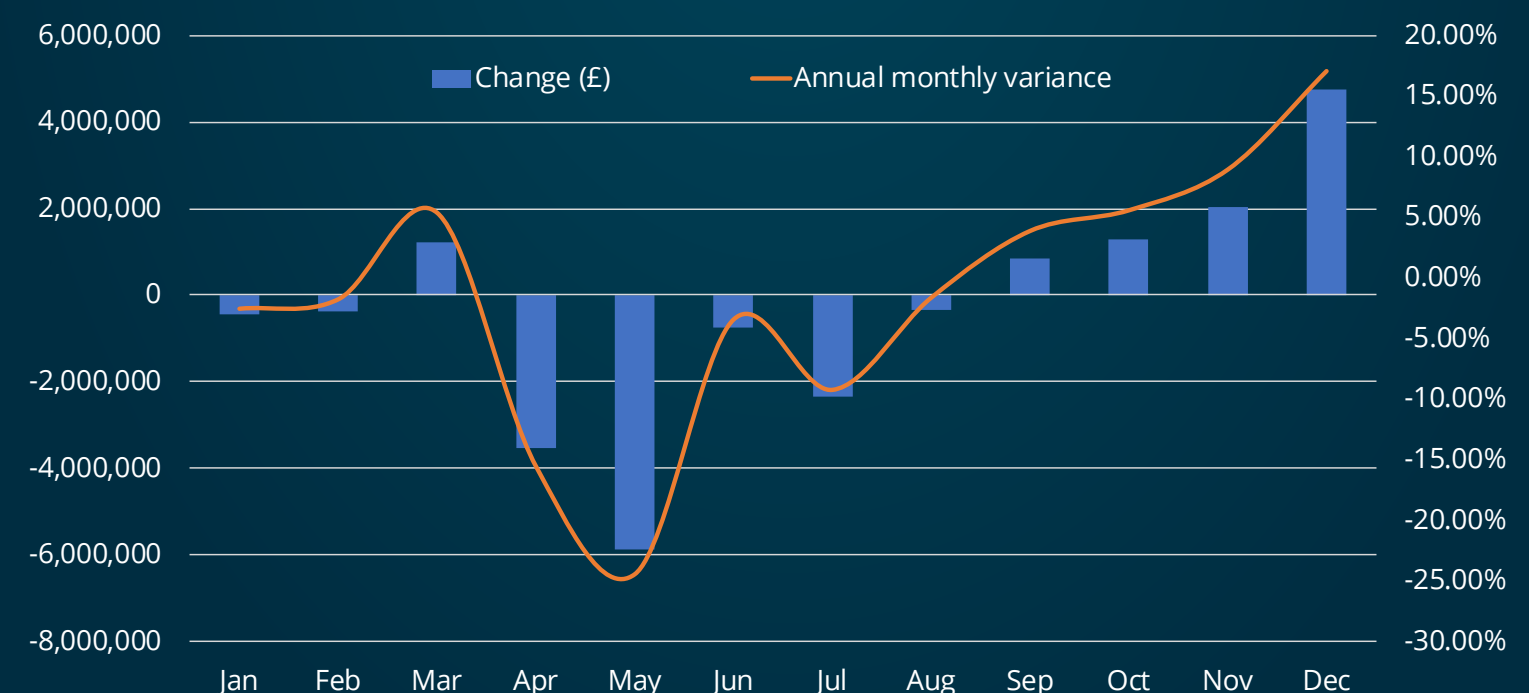
Turning to Local Authority resources, the ongoing lockdown and restrictions will impact them hard as the true costs of the pandemic on council finances are felt across all frontline services along with the potential implications of a Brexit trade deal.

2021 will see the county of Northamptonshire being split into two new unitary authorities on 1 April. North Northamptonshire (currently Kettering, Corby, Wellingborough & East Northamptonshire Councils) and West Northamptonshire (currently Daventry, South Northants and Northampton) with all county planning functions being split between them. It will be interesting to see whether the strain on council finances could lead to more Local Government Reviews and the merging of authorities across the country.

Planning application fees in 2019 vs 2020



Variance between 2019 vs 2020



Planning Portal – what's new?

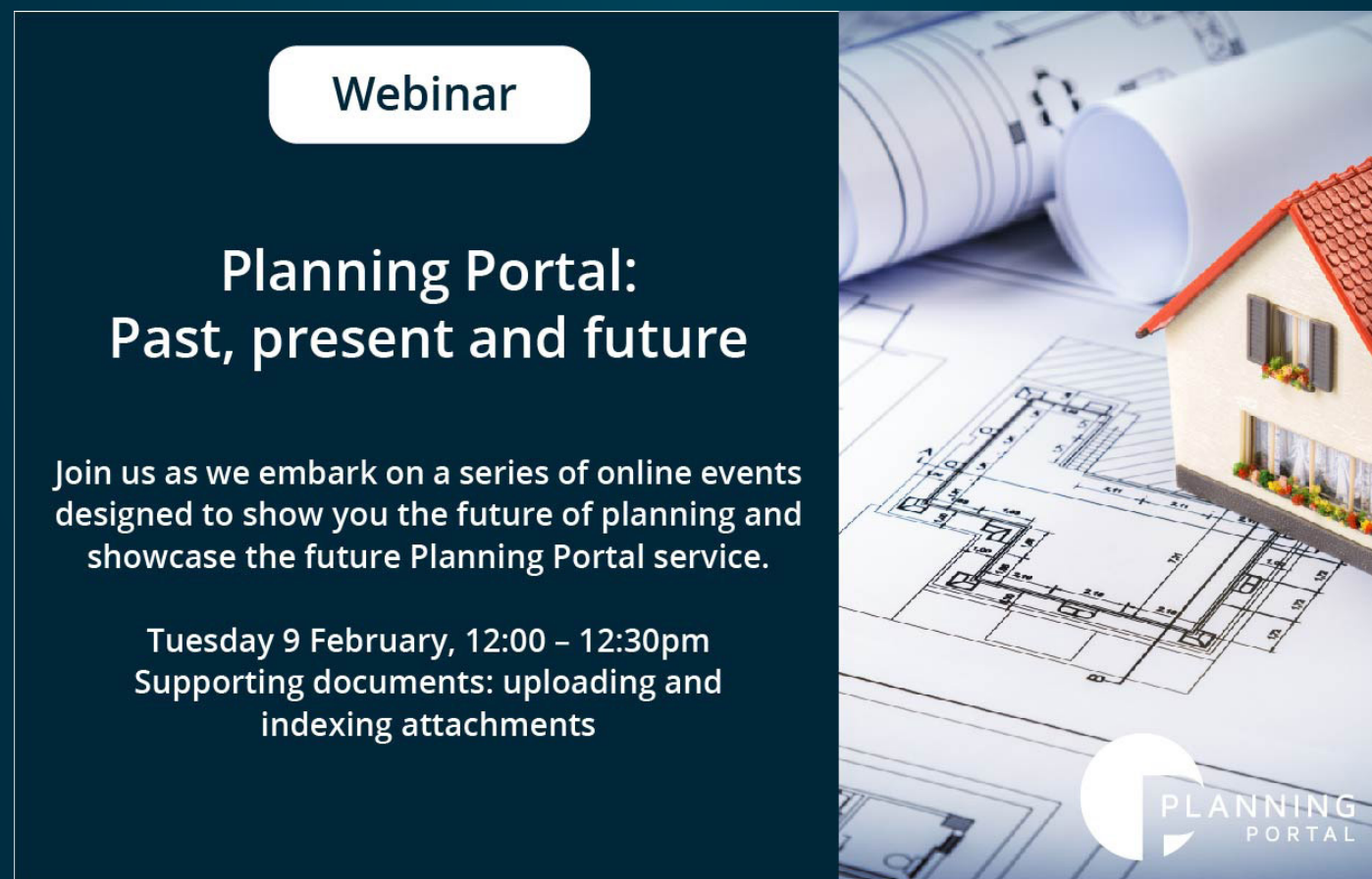
Webinars

We are very excited about 2021 at the Planning Portal. As many of you will know, we are in the process of re-platforming the Planning Portal planning application service, using insight from across all stakeholders to improve our system and add new features and functions. These changes will be live in quarter two of 2021.

To support our customers and strategic partners with this transition we are running a webinar series called 'Planning Portal: Past, Present and Future'. These webinars are an opportunity for us to provide you with the most up to date information about these new developments.

Our next episode will be live on Tuesday 9 February 2021 at 12:00. If you would like to join us, please [register for free](#).

If you have missed any of our previous episodes, they are all available over on our [YouTube channel](#).



Webinar

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 the future Planning Portal service.

Tuesday 9 February, 12:00 – 12:30pm
Supporting documents: uploading and indexing attachments

PLANNING PORTAL

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Planning Portal's Virtual Conference – catch up now!

If you were unable to attend any of the sessions at our Planning Portal Virtual Conference 2020, you can now catch up over on our [YouTube channel](#).

Following the trend of 2020, the conference was held virtually, with speakers, panellists and Q & A sessions held online, offering insight and the latest updates across the planning and building process.

Topics included the latest Government white paper and developments in policy, including biodiversity net gain and building standards. Along with advancements in technology both for development management and throughout the planning process, the week was jam packed with information and insight.

To register your interest for our 2021 event please email: conference@planningportal.co.uk



Planning Portal Virtual Conference 2020

Event round-up

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PLANNING PORTAL

How can we help you?

The Planning Market Insight Report provides you with a unique insight of the latest trends throughout the planning market on a national, regional, and local basis. We believe our content is relevant and interesting, but we always welcome feedback and recommendations.

If there is a topic you would like to know more about or content you would like to see, please do not hesitate to contact us at communications@planningportal.co.uk.

In next month's edition...

...we will take a more in depth look at the Prior Approval for Telecommunication application form and the change in recent submissions between 2019 vs 2020.

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January 2021
Planning Market Insight Report

