

Planning Market Insight Report from the Planning Portal



July 2020: COVID-19 and Full Planning Applications for Residential Schemes

Foreword

Welcome to July's Planning Market Insight Report and what a difference a month makes in these unprecedented times!

With many aspects of the COVID-19 lockdown having now eased in England, most of us are pleased to see businesses reopen during June and July but with social distancing remaining in place.

These are small, controlled steps introduced by the government to get the economy moving as we return to a 'new normal' working and recreational environment.

It's been widely communicated that businesses in every UK employment sector have suffered as a result of the global pandemic but arguably the worst affected has been the hospitality industry.

Restaurants and cafes have seen the most temporary closures with around 84% of all businesses in the sector closing their doors. This is higher than both Construction (71%) and Manufacturing (60%) and way above the national average of 48%.

At the Planning Portal we have been monitoring the impact on planning application submission that caters for every employment sector. June's figures are now in and have revealed surprisingly positive results when compared to previous months and 2019 volumes.

As revealed in previous editions, submissions were down 18.5% in April and 14% in May when compared to 2019. However, June's figure was an astonishing 21% increase on the previous year!

This could indicate that many proposals during late March, April and May were put into abeyance and are now starting to progress once more.

It's still too early to predict what will happen in the coming months but it's likely to be a gradual recovery over a much longer period. Both businesses and homeowners will need to have confidence in their financial position to commit to any development, and certainly for larger schemes, applicants will need to be certain the market for their development remains viable.

As well as continuing to track the impact of COVID-19 on planning application submissions, in this month's report we look deeper into the residential proposals submitted in 2020. We take a more in-depth review of these schemes, looking at the proposed location, the numbers of existing and proposed dwellings, the housing categories (i.e. market, affordable) and dwelling types (i.e. houses, flats), plus the number of bedrooms for each unit.

To access the full details of this report, please contact us to take advantage of the subscribers' launch offer. We'd also love to hear from you if there is further information you'd like to see in future reports.

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Sarah

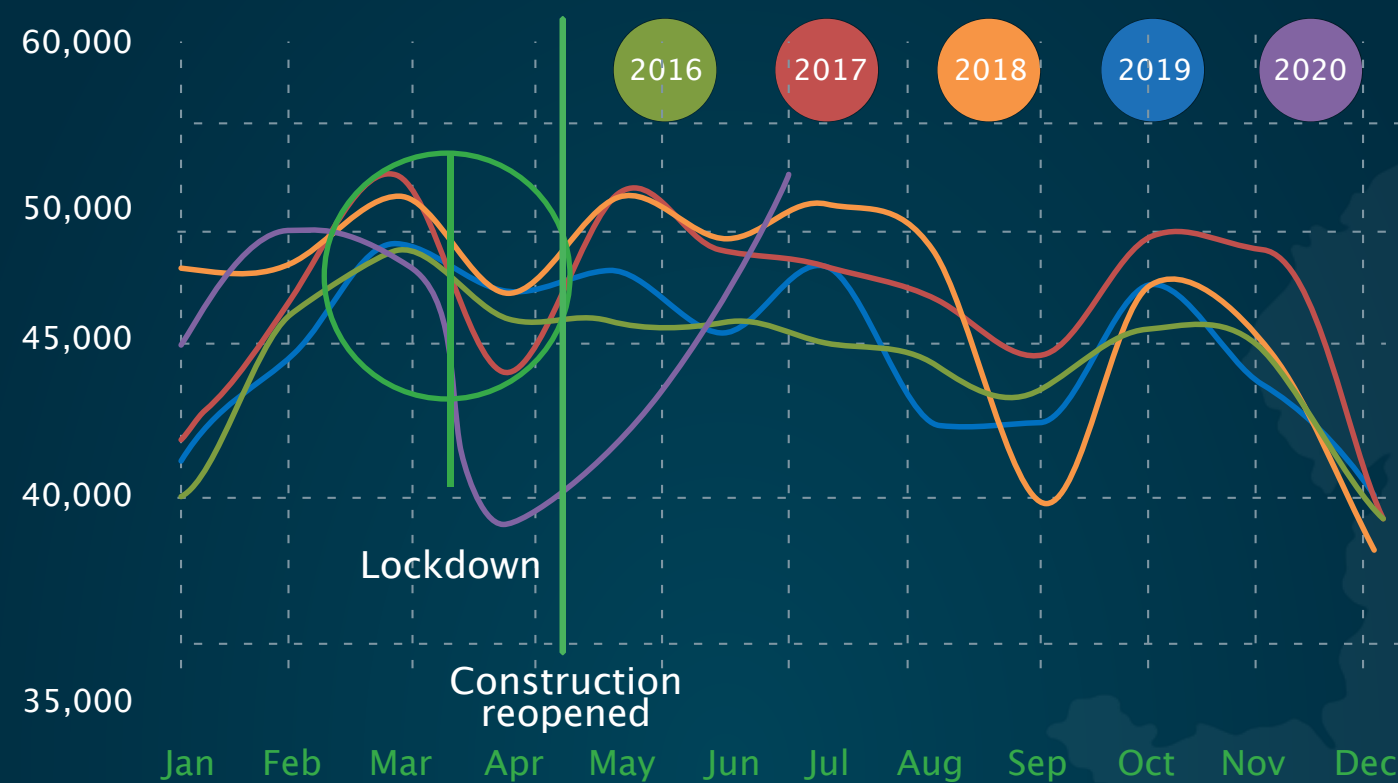


Sarah Chilcott
Managing Director



National graph over five years

Application numbers 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 six months of this year.

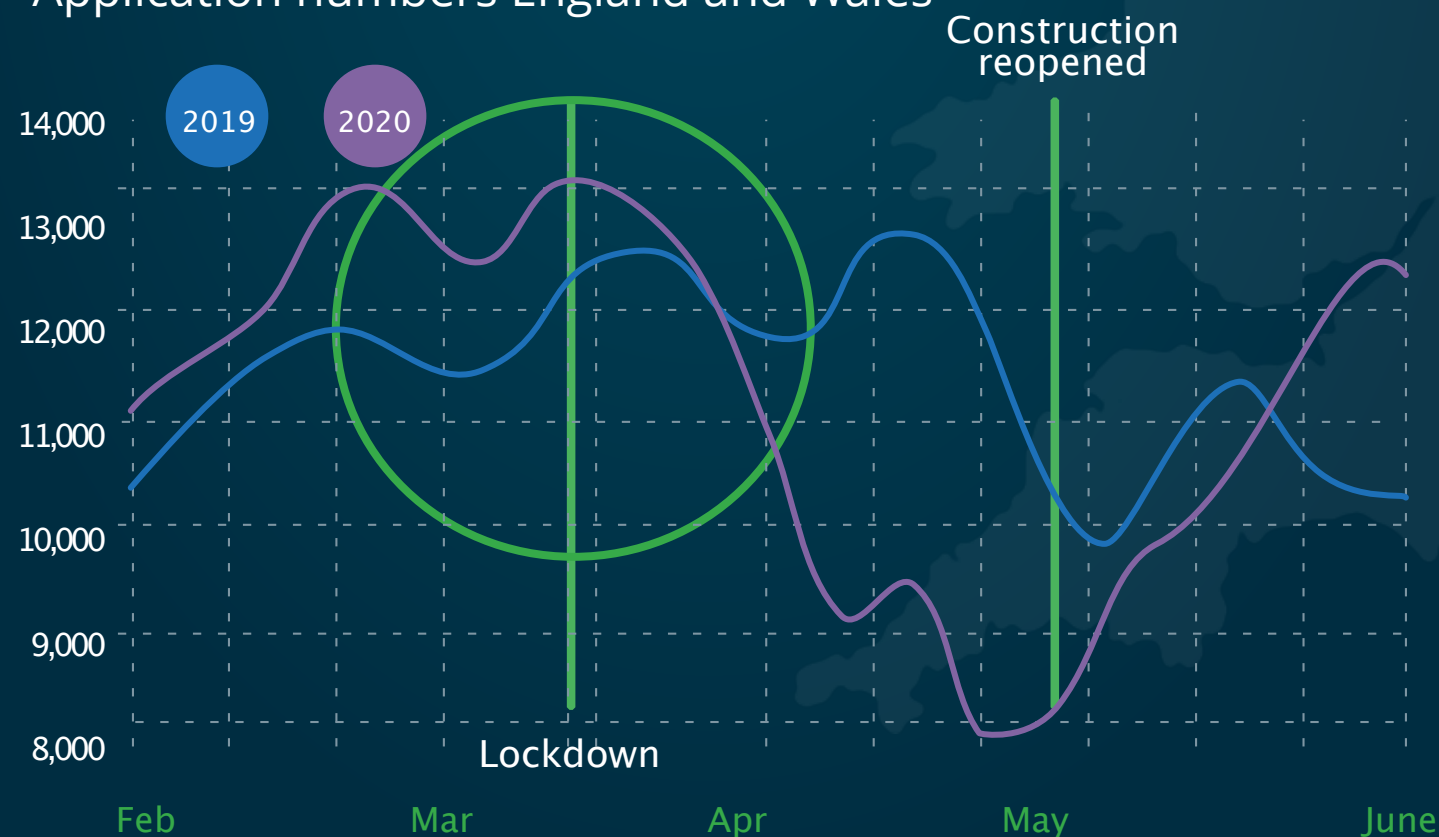
When concentrating solely on the months affected by COVID-19 and measuring submission against 2019, we can see a reduction of 3.5% in March, 18.5% in April, that reduces to a deficit of only 14% in May.

However, in June 54,421 applications were submitted through the Planning Portal; an overall increase of nearly 21% compared to 2019. Furthermore, this is a 31% increase from May 2020 and represents the second highest number of applications submitted in a month since the Planning Portal was first launched, the previous highest being March 2017 with 55,535 applications.

The data shows that the early positive signs of recovery in May have continued throughout June, providing a good indicator that applicants have sufficient confidence in the economic market to continue with proposals.

National graph by week

Application numbers England and Wales



As mentioned earlier in the report, a key deciding factor in whether to proceed or to postpone applications is the financial situation of the individual applicant or business. The last three and half months have undoubtedly provided time to evaluate proposals and consider if the finance for home improvements remains secure, or in the case of businesses whether the business case still stacks up.

Applicants can also continue to obtain planning permission and if achieved plan further phases of a development, potentially using the three-year permission to plan the build, based upon the funds required and allowing for some recovery time for finances to settle.

It is clear from the impact of COVID-19 that any form of recovery is still in the very early stages. It remains to be seen what the future may look like across the many business sectors, and how each sector may have different recovery strategies, in what is expected to be a long and gradual process over the coming 18 months.

The Regional View

For the first time since March, the volume of planning applications has risen across all regions by around a third.

Yorkshire and the Humber was one of the strongest areas for growth in May, with a 12% month-on-month increase and this has continued into June with a 33% increase on May figures. Other regions with a slightly above average growth month-on-month are the North West at 35% and the East and West Midlands, both with a 34% increase for the same period.

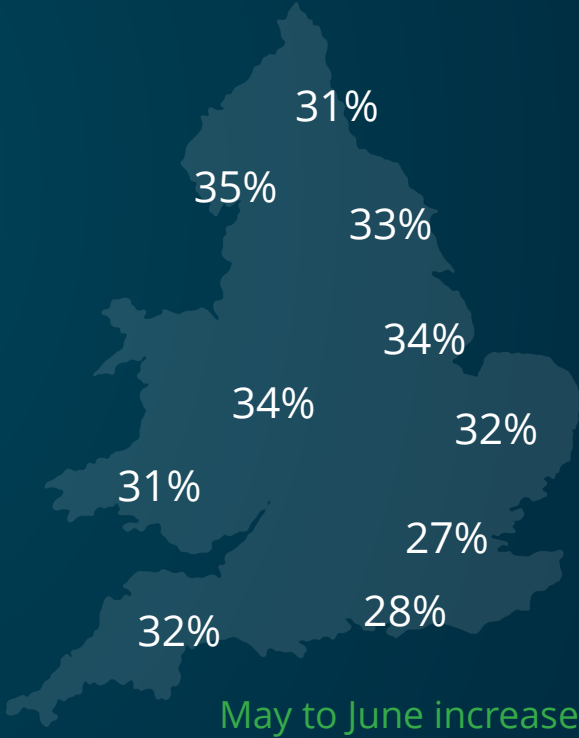
Our historical data shows us that in normal circumstances, we can expect application volumes to vary each month and follow a similar pattern each year. Analysing the percentage variation in each month as compared to the previous year, gives us a strong indication of the variation regionally from the seasonal norm. Applications are now also above the expected seasonal average in all areas, with Yorkshire and the Humber and the North West receiving 30% more applications in June 2020 than in June 2019.

The London area and Wales are the regions showing the slowest recovery from the COVID-19 impact, with their volumes only 12% and 6% above last year respectively. In London especially, this may in part be due to the make-up of applications, which will be explored later in this report. It is also worth bearing in mind that the volume of applications in London is still significantly higher than those in the other regions, with the exception of the South East. The overall increase in June across the regions would suggest that these applications were not submitted earlier due to the impact of COVID-19, with applicants now in a position to continue with their proposals.

Regional comparison: 2019 vs 2020 by month

Region	March	April	May	June
North East	0%	-16%	-12%	+20%
North West	-1%	-22%	-14%	+30%
Yorkshire & The Humber	-3%	-17%	-5%	+30%
East Midlands	-3%	-19%	-16%	+22%
West Midlands	-3%	-10%	-11%	+26%
East of England	-5%	-20%	-12%	+26%
London	-3%	-23%	-19%	+12%
South East	-6%	-20%	-14%	+19%
South West	1%	-12%	-7%	+23%
Wales	-8%	-18%	-21%	+6%

Region	May	June
North East	933	1,220
North West	3,655	4,948
Yorkshire & The Humber	2,992	3,979
East Midlands	2,813	3,766
West Midlands	3,045	4,066
East of England	5,463	7,216
London	8,158	10,331
South East	8,593	11,018
South West	4,815	6,334
Wales	1,177	1,543



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In the early days of the lockdown, we saw a correlation between the number of COVID-19 cases in certain regions and the impact on planning application numbers in the same areas. As restrictions are gradually lifted however, this correlation is no longer valid. By analysing the government data on COVID-19 cases for example, we can see that the regions with the highest rise in cases are the East Midlands and Yorkshire and the Humber, and indeed both of these regions are seeing strong rises in the numbers of planning applications submitted as well.

Total number of COVID-19 cases

Region	03 Jun 20	09 July 20	Change	% Change
North East	10,294	15,109	4,815	47%
North West	25,891	43,107	17,216	66%
Yorkshire & The Humber	14,433	29,610	15,177	105%
East Midlands	9,266	21,639	12,373	134%
West Midlands	16,296	25,527	9,231	57%
East of England	14,309	23,563	9,254	65%
London	27,042	33,985	6,943	26%
South East	21,763	34,029	12,266	56%
South West	7,744	12,811	5,067	66%
Wales	14,203	15,929	1,726	12%

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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. Looking back to the data for March and the beginning of lockdown, we can see in some cases there is a consistency in the pattern of application types performing above and below seasonal averages. Notably, Prior Approval: Development by Telecoms Operators continues to perform strongly against 2019 volumes, showing an even starker rise in June. Advertising applications by contrast continue below typical levels by around a 60% deficit.

	March	April	May	June
Householder and associated consents	-6%	-21%	-19%	24%
Full Planning and associated consents	-9%	-23%	-24%	-4%
Outline Applications	-9%	-10%	-21%	-12%
Advertising Applications	-26%	-61%	-62%	-60%
Prior Approval: Development by Telecoms Operators	560%	939%	104%	1837%
Tree Works: Trees in conservation areas/subject to TPOs	-10%	-19%	31%	91%

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Prior Approval: Development by Telecoms Operators

	April	May	June
2019	44	225	30
2020	457	458	581
% + / -	939%	104%	1837%

This table shows the last three months has seen a considerable increase in the submission of this Prior Approval.

When looking across all regions, London is top as expected but with high submission locations in the South East, West Midlands and North West, with relatively few in the South West, North East and Wales.

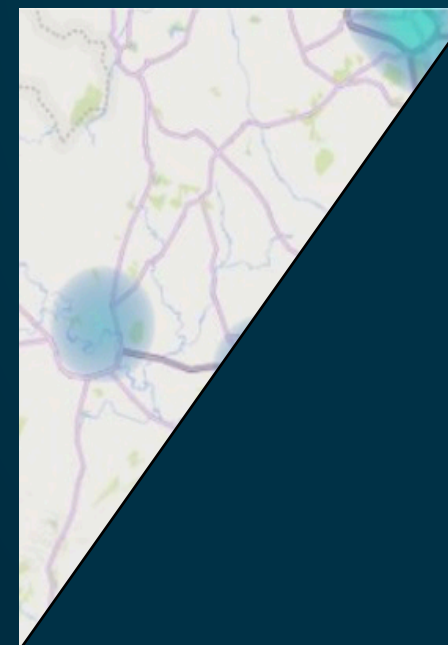
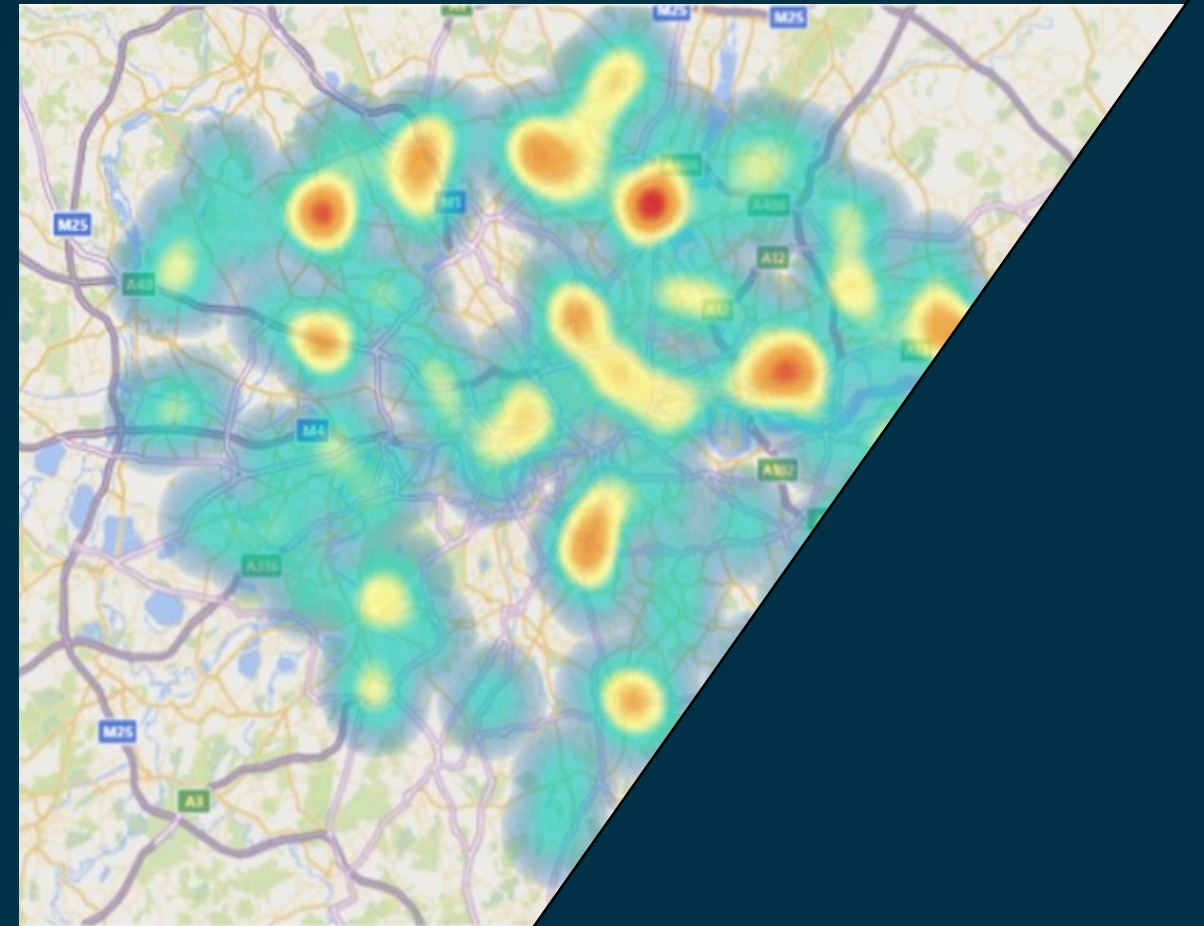
Region	June 2020 submissions
North East	11
North West	83
Yorkshire & The Humber	47
East Midlands	37
West Midlands	86
East of England	47
London	148
South East	87
South West	23
Wales	12
Total	581

Prior Approval: Development by Telecoms Operators

National exc. London, June 2020



London and West Midlands, June 2020



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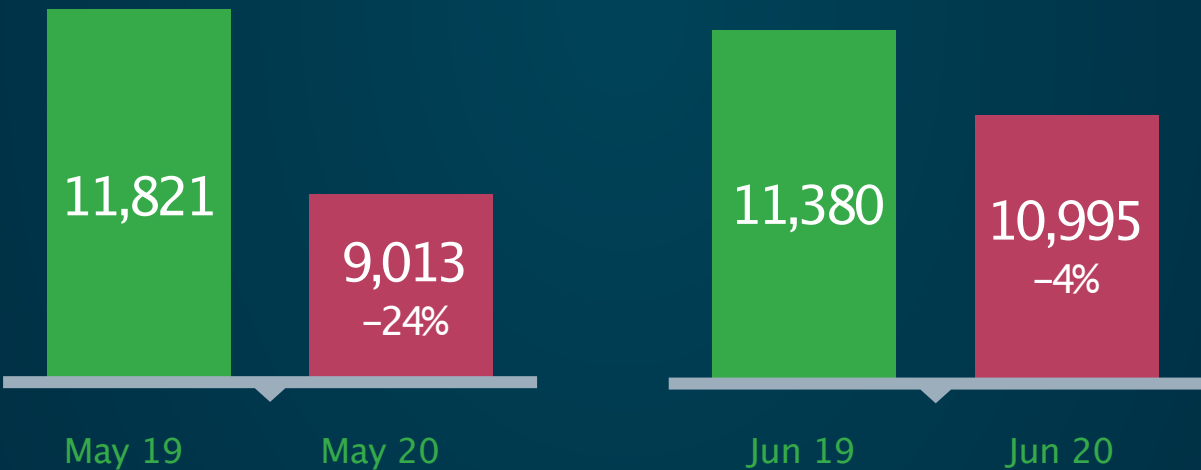
Applications and associated consents

Both Householder consents and Full Planning were showing levels of around 20% below average in April and May but both have seen an increase in June. For the first time however, we can see a contrast in the pattern between the two types of application. We can see from the data that the Householder and associated consents have seen a significant improvement, now 24% above the level of June 2019. Whereas for Full Planning and associated consents the recovery is a little slower, now back to almost normal levels for June. Outline consents which often indicate the strength of the development pipeline as they are the very earliest type of application, especially on larger schemes, have also shown some improvement from the low in May.

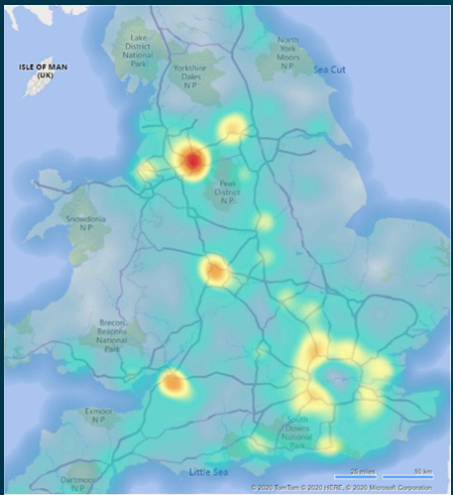
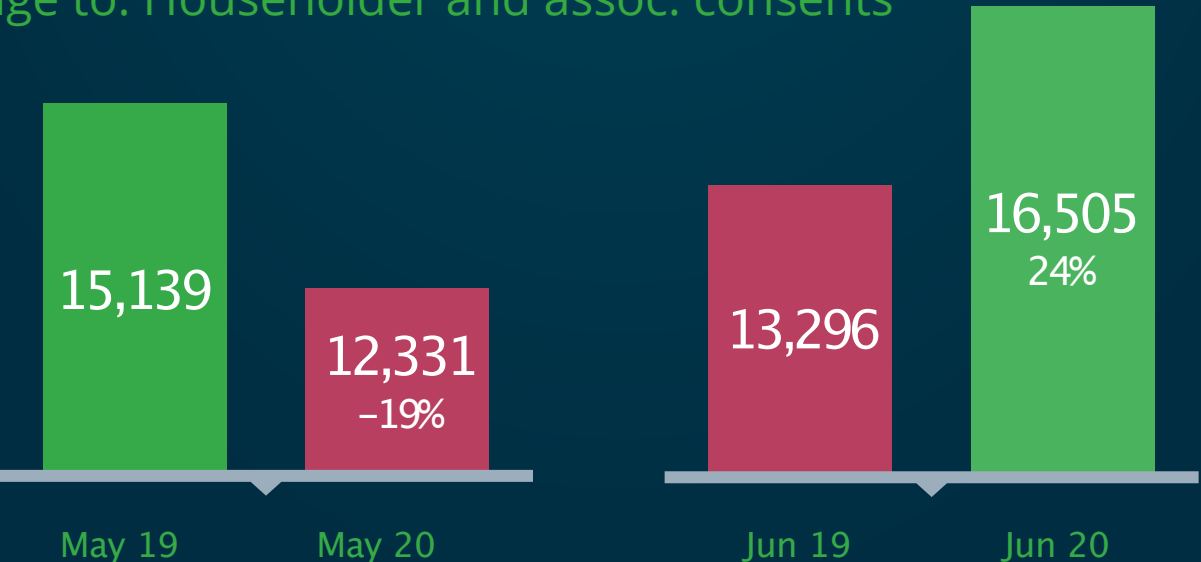
Looking in more detail at these two types of application, we can see regional variations which support the earlier analysis about overall differences in the recovery across the regions of England and Wales. The Full Planning applications heat map shows a greater visual concentration of submissions from May to June in Yorkshire and the Humber, the North West and East and West Midlands, and a correlation between the slightly lower growth rate in London and the South East of Full Applications which covers major projects as well as more urban works, such as changes of use from commercial and retail to residential and other purposes.

For householder applications the recovery in submission is very clear when looking at London alone, with the concentration across the majority of the Boroughs but more so south of the Thames.

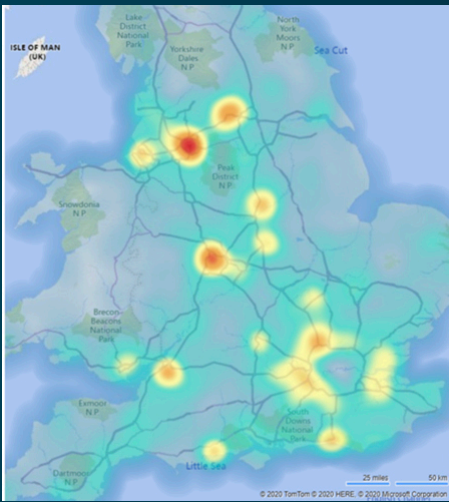
Full Planning and assoc.consents



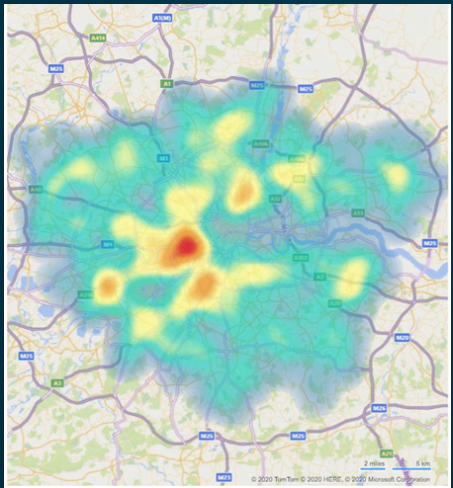
Change to: Householder and assoc. consents



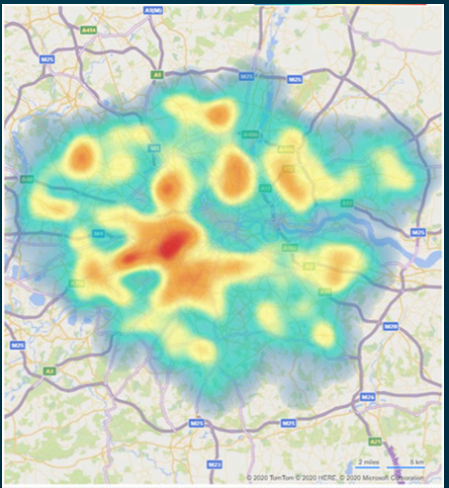
Full Planning
exc. London, May 20



Planning exc.
London, June 20



Householder Applications
London, May 20



Householder Applications
London, June 20

Residential proposals submitted using the Full Planning application form

Following last month’s feature on non-residential development proposals using the Full Planning form, this month we have chosen to look at residential proposals submitted using this form.

Interestingly, the data shows that approximately 25% of all applications submitted using this form and associated consents are for residential developments. The table shows the breakdown of this by type in 2020.

Application Form	Jan	Feb	Mar	Apr	May	June	Total
Full planning & demolition in a conservation area	83	98	102	96	96	130	605
Full planning & display of advertisements	2	2	1	1	2	1	9
Full planning & listed building consent	95	115	105	115	90	126	646
Full planning permission	2,050	2,322	2,354	2,085	1,912	2,768	13,491
Grand Total	2,230	2,537	2,562	2,297	2,100	3,025	14,751

When completing the Full Planning form, applicants are required to provide details on residential units (including conversion) and whether proposals include the gain, loss or change of use of residential units. If this is the case, further details are then captured on the total number of existing and proposed dwellings, that exist at present and the number after the development is complete, by housing category and dwelling type.

The residential unit table from the Full Planning application form is shown below.

17. Residential Units (Including Conversion)

Does your proposal include the gain, loss or change of use of residential units? ☐ Yes ☐ No

If Yes, please complete details of the changes in the tables below:

Proposed Housing

Market Housing	Not known	Number of Bedrooms					Total
		1	2	3	4+	Unknown	
Houses	<input type="checkbox"/>						a
Flats/maisonettes	<input type="checkbox"/>						b
Sheltered housing	<input type="checkbox"/>						c
Bedsit/studios	<input type="checkbox"/>						d
Cluster flats	<input type="checkbox"/>						e
Other	<input type="checkbox"/>						f
Totals (a + b + c + d + e + f) =							A

Existing Housing

Market Housing	Not known	Number of Bedrooms					Total
		1	2	3	4+	Unknown	
Houses	<input type="checkbox"/>						a
Flats/maisonettes	<input type="checkbox"/>						b
Sheltered housing	<input type="checkbox"/>						c
Bedsit/studios	<input type="checkbox"/>						d
Cluster flats	<input type="checkbox"/>						e
Other	<input type="checkbox"/>						f
Totals (a + b + c + d + e + f) =							F

Residential proposals submitted using the Full Planning application form

Once the table has been fully completed, it captures the 'Total Net Gain' or 'Loss' of 'Residential Units' through a simple calculation of the Proposed Housing Grand Total - Existing Housing Grand Totals.

By delving deeper into residential applications being applied for in the first six months of this year, the data shows a Proposed Housing Grand Total of 93,882 units - Existing Housing Grand Totals of 16,503 units. Therefore, a Total Net Gain of 77,379 units.

NB – These are the figures for applications submitted using the Full Planning and associated consents only. Other residential applications are submitted using the Outline Planning forms and Prior Approvals, mainly using the Office to Residential form.

To gain a more comprehensive insight into total residential submissions in 2020, we analysed the Outline Planning forms data to obtain the Total Net Gain figures for these applications too. This revealed a further Net Gain Total of 51,226 units. Combining this with the Full Planning submissions gives a Grand Total Net Gain of 128,605 units in the first six months of 2020.

Region	Jan	Feb	Mar	Apr	May	Jun	Total
North East	51	39	43	41	41	66	281
North West	193	213	224	184	205	269	1,288
Yorkshire & The Humber	173	191	199	169	162	212	1,106
East Midlands	189	238	219	186	147	251	1,230
West Midlands	207	232	214	183	144	235	1,215
East of England	281	327	376	327	291	447	2,049
London	430	508	484	456	402	563	2,843
South East	426	505	474	422	406	570	2,803
South West	280	284	328	329	302	411	1,934
Wales*	0	0	1	0	0	1	2
Total	2,230	2,537	2,562	2,297	2,100	3,025	14,751

*The residential table is not a mandatory question in Wales

Net Gain of Residential Units by Region in 2020

On understanding the total number of applications to each region, we also analysed the data further to explore the net gain in units by region.

The table shows the complete breakdown by regional area.

Region	Jan	Feb	Mar	Apr	May	Jun	Total
North East	456	110	175	291	338	499	1,869
North West	1,274	2,078	1,533	1,122	1,183	895	8,085
Yorkshire & The Humber	1,236	707	1,503	637	1,482	1,310	6,875
East Midlands	1,274	1,441	878	899	1,001	2,231	7,724
West Midlands	1,175	980	1,197	2,856	1,484	1,385	9,077
East of England	645	1,272	1,280	1,668	2,299	2,003	9,167
London	1,387	2,158	3,028	2,720	1,789	3,528	14,610
South East	1,715	1,896	2,255	2,055	1,902	3,365	13,188
South West	1,074	947	1,198	1,240	1,098	1,224	6,781
Wales*	0	0	1	0	0	2	3
Total	10,236	11,589	13,048	13,488	12,576	16,442	77,379

There is a direct correlation between the number of applications submitted and the higher net gain in residential units across each of the regions. London and the South East have a higher unit ratio gain per application as expected, potentially due to providing a higher density in housing stock. The South West is interesting and bucks this trend a little; although it has received more applications than most regions, the net unit gain is the lowest. This would suggest lower density housing schemes, possibly of detached or semi-detached housing rather than flats.

*The residential table is not a mandatory question in Wales

Net Gain of Residential Units 2020

Major vs Minor Residential Developments

There are many definitions of residential developments to describe their scale in terms of the number of units to be provided.

The definition of a **Major application** in the Development Management Procedure Order 2010 is where the number of residential units to be constructed is ten or more, with a **Minor application** classed as between one – nine units being created.

However, there are a couple of additional application classifications that we thought would be useful to explore with the residential data.

Large scale Major Developments for dwellings: a large scale major development is one where the number of residential units to be constructed is 200 or more.

Small scale Major Developments for dwellings: a small scale major development is one where the number of residential units to be constructed is between ten and 199 (inclusive).

Minor Developments for dwellings: minor development is one where the number of dwellings to be constructed is between one and nine inclusive.

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	Jan	Feb	Mar	Apr	May	Jun	Total
Large scale	5	8	5	6	10	8	45
Small scale	146	169	146	170	161	209	1,046
Minor	2,079	2,360	2,079	2,121	1,929	2,808	13,660
Grand Total	2,230	2,537	2,230	2,297	2,100	3,025	14,751

Residential housing sector types being applied for – Proposed values only

The individual housing categories are defined as:

1. **Market Housing** - Housing sold or rented on the open market

2. **Social**, Affordable or Intermediate Rent - These three rental categories are grouped together, but each has a specific definition. Social rented housing is owned by Local Authorities and private registered providers (as defined in section 80 of the Housing and Regeneration Act 2008), for which guideline target rents are determined through the national rent regime. This type of housing may also be owned by other persons and provided under equivalent rental arrangements to the above, as agreed with the Local Authority or with Homes England.

Affordable rented housing is let by Local Authorities or private registered providers of social housing to households who are eligible for social rented housing. Affordable Rent is subject to rent controls that require a rent of no more than 80 per cent of the local market rent (including service charges, where applicable). Intermediate rented housing is provided at a cost above social rent, but below market levels subject to the Affordable Housing criteria.

3. **Affordable Home Ownership** - Affordable housing is intermediate housing, provided to eligible households whose needs are not met by the market. Eligibility is determined with regard to local incomes and local house prices.

Affordable housing should include provisions to remain at an affordable price for future eligible households or for the subsidy to be recycled for alternative affordable housing provision.

Homes that do not meet the above definition of affordable housing, such as 'low cost market' housing, may not be considered as affordable housing for planning purposes.

4. **Starter Homes** - New homes or new conversions with a discount of at least 20% of their full market value. Starter home prices are capped at £250,000 outside London and £450,000 in London, they will also generally have restrictions applied to their ability to be rented or resold.

5. **Self-Build and Custom Build** - Houses built or completed by: individuals; associations of individuals; or persons working with or for them, to be occupied by those individuals.

It does not include the building of a house on a plot acquired from a person who builds the house wholly or mainly to plans or specifications they have decided or offered (e.g. buying an unbuilt house 'off-plan')

In considering whether a home is a self-build or custom build home, relevant authorities must be satisfied that the initial owner of the home will have primary input into its final design and layout.

Net Gain of Units by Housing Sector

Net Gain of Units by Housing Sector	Jan	Feb	Mar	Apr	May	Jun	Grand Total
Intermediate	522	1,117	847	771	325	744	4,326

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Starter Homes							
Grand Total	10,236	11,589	13,048	13,488	12,576	16,442	77,379

In late May 2020 we updated the housing sectors to accurately reflect the above categories. However, what is clear is that the overriding majority of housing applied for is for Market sale at 82% followed by 17% of Social, Affordable or Intermediate Rent where the Ministry of Housing Communities and Local Government (MHCLG) grouped these categories together.

Net Gain of residential house types being applied for

The residential application data also provides a breakdown by the unit (or dwelling) types being applied for

The unit types are defined as:

- a. **Houses** - A dwelling that is not a flat, includes single-storey bungalows.
- b. **Flats / Maisonettes** - Includes separate and self-contained premises constructed or adapted for use for residential purposes and forming part of a building from some other part of which it is usually divided horizontally. Maisonettes are flats containing more than one storey.
- c. **Cluster flats** - Units with no separate or self-contained living and sleeping accommodation within a larger building of which it forms a part.
- d. **Sheltered housing** - specifically designed housing in a group with services such as the support of a warden, communal facilities, alarm systems and laundry services. Also includes grouped housing schemes without the services of a warden and other communal facilities.
- e. **Bedsits / Studios** - Refers to a bedroom/living room containing cooking facilities. In addition, it may also contain washing facilities or even a shower.
- f. **Other** - Other types of dwellings not specifically referred to in the above types.

National Net Gain of residential house types in 2020

Unit type	Jan	Feb	Mar	Apr	May	Jun	Grand Total
Bedsit/studios	159	-189	375	424	403	466	1,638
Cluster flats	23	34	34	34	120	107	352
Flats/maisonettes	4,022	5,893	7,026	5,420	5,842	8,175	36,378
Houses	5,750	5,595	5,447	5,290	6,003	7,551	35,636
Live Work	-4	22	11	-1	17	-3	42
Other	165	61	92	2,166	125	71	2,680
Sheltered housing	121	173	63	155	66	75	653
Grand Total	10,236	11,589	13,048	13,488	12,576	16,442	77,379

National Net Gain exc. London

Unit type	Jan	Feb	Mar	Apr	May	Jun	Grand Total
Bedsit/studios	129	304	316	242	357	373	1,721
Cluster flats	23	38	38	34	120	108	361
Flats/maisonettes	2,784	3,454	4,338	3,154	4,388	5,024	23,142
Houses	5,632	5,439	5,164	5,024	5,744	7,299	34,302
Live Work	-3	19	10	1	14	-3	38
Other	164	43	91	2,158	94	23	2,573
Sheltered housing	120	134	63	155	70	90	632
Grand Total	8,849	9,431	10,020	10,768	10,787	12,914	62,769

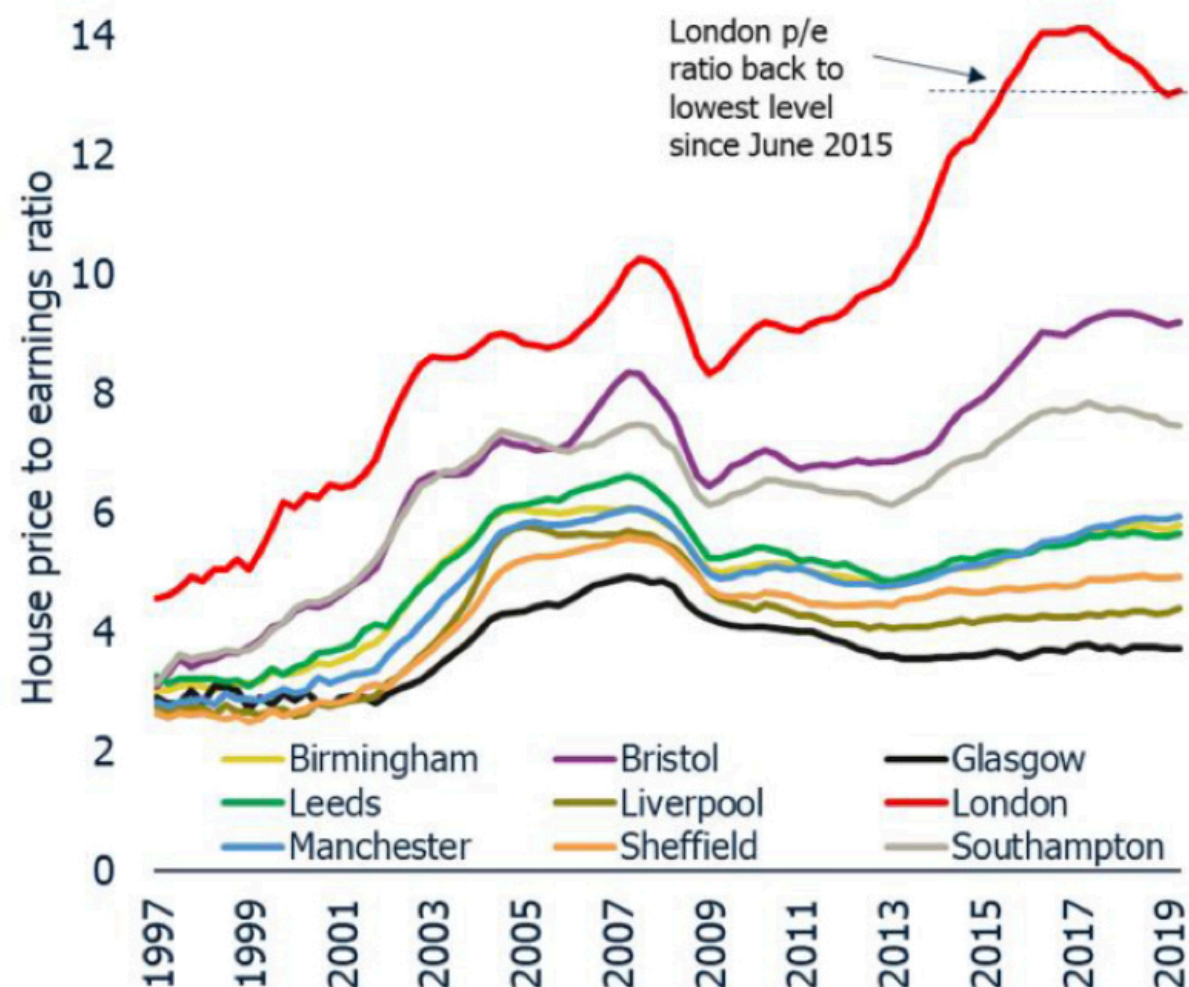
Net Gain London Only

Unit type	Jan	Feb	Mar	Apr	May	Jun	Grand Total
Bedsit/studios	30	-493	59	182	46	93	-83
Cluster flats	0	-4	-4	0	0	-1	-9
Flats/maisonettes	1,238	2,439	2,688	2,266	1,454	3,151	13236
Houses	118	156	283	266	259	252	1334
Live Work	-1	3	15	-2	3	0	4
Other	1	18	1	8	31	48	107
Sheltered housing	1	39	0	0	-4	-15	21
Grand Total	1,387	2,158	3,028	2,720	1,789	3,528	14610

National Net Gain of residential house types in 2020

The above tables show that most developments outside of London are for houses and then flats, at c.55% and 37% respectively making up 92% of the total housing stock being applied for. However, when looking at London specifically, this switches hugely with 91% of all stock being for flats and houses reduced to a mere 9%.

This is reflective of the fact that London has considerable housing price differences in terms of affordability versus the average earnings ratio, in each area as shown in the graph.



Source: Zoopla Research

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UK house prices near record high in post-election boom

Earlier this year, there was a surge in house sales following the election, with price records set to be broken in the spring.

UK house prices were at a near-record level after the market was boosted by a post-election bounce, as reported by the property website Rightmove, in February 2020.

Regional trends

Rightmove said that all regions in the UK saw an upswing in monthly house price growth in February, except the East Midlands, where prices dropped 0.5%.

Yorkshire and Humber saw the biggest monthly price rise at 3.5%, followed by Wales at 3.4%.

The average property price in London went up by 2.7%, while prices went up in the South East by 1%.

However, this was pre-COVID-19 and with property markets across the UK having largely reopened, experts now believe house prices could fall this year as economic uncertainty continues in the wake of the COVID-19 outbreak.

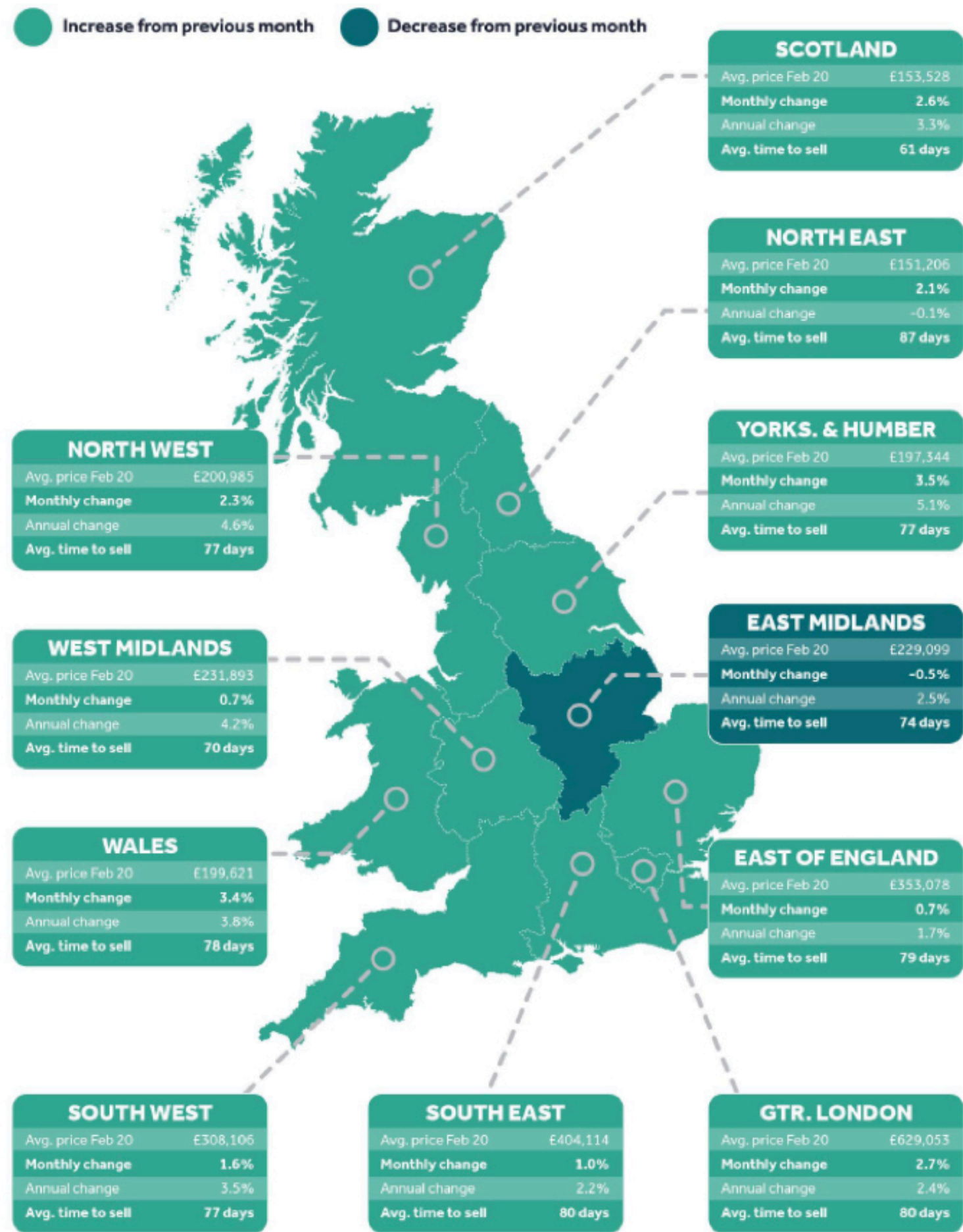
How have house prices changed?

At present it is far too early to tell exactly what impact COVID-19 will have on house prices, and it is likely that the figures we see in the coming months will fluctuate significantly.

The most reliable gauge of house prices is the Land Registry's UK House Price Index, but this has been suspended until further notice due to too few transactions taking place.

Rightmove published its monthly asking price index without a headline figure in April and May, but in June's index it stated that asking prices in England were up 1.9% when compared to the period before the lockdown.

UK house prices in February 2020



Residential unit number of bedrooms Proposed units

The application form residential table captures information on the number of bedrooms for each of the proposed and existing units.

The table below presents the total number of proposed units being applied for in the first six months of 2020.

No. Beds	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Grand Total	%
One	3,352	4,054	4,713	4,217	4,089	6,810	27,235	29%
Two	4,185	4,837	5,188	4,658	4,709	6,861	30,438	32%
Three	2,857	2,964	2,948	2,715	3,109	4,032	18,625	20%
Four	1,550	1,525	1,713	1,914	1,735	2,368	10,805	12%
Unknown	165	968	524	2,249	2,550	323	6,779	7%
Grand Total	12,109	14,348	15,086	15,753	16,192	20,394	93,882	100%

Number of bedrooms per Unit exc. London

No. Beds	Jan	Feb	Mar	Apr	May	Jun	Grand Total	%
One	2,534	2,552	3,197	2,714	3,080	4,677	18,754	25%
Two	3,511	3,315	3,661	3,214	3,802	5,257	22,760	31%
Three	2,468	2,472	2,422	2,254	2,759	3,276	15,651	21%
Four	1,488	1,380	1,617	1,771	1,653	2,248	10,157	14%
Unknown	127	941	488	2,227	2,466	250	6,499	9%
Grand Total	10,128	10,660	11,385	12,180	13,760	15,708	73,821	100%



Number of bedrooms per Unit in London

No. Beds	Jan	Feb	Mar	Apr	May	Jun	Grand Total	%
One	818	1,502	1,516	1,503	1,009	2,133	8,481	42%
Two	674	1,522	1,527	1,444	907	1,604	7,678	38%
Three	389	492	526	461	350	756	2,974	15%
Four	62	145	96	143	82	120	648	3%
Unknown	38	27	36	22	84	73	280	1%
Grand Total	1,981	3,688	3,701	3,573	2,432	4,686	20,061	100%

This data shows that nationally 56% of the housing stock being proposed is for one or two bed units, with three bedrooms at 21%.

These percentages change slightly when we remove London from the national picture as shown in the following graphs.

With focus specifically on London, the data shows that 80% of proposed submissions are for one or two bed units with three beds at 15%. This correlates with the data provided earlier in the report on housing types that shows most applications are for flats in London, that clearly links to demand and affordability too.

Residential data comparison 2019 vs 2020

Unlock the full report data today

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Residential data comparison 2019 vs 2020

Unlock the full report data today

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Local Planning Authorities:

Yorkshire and the Humber

This month's report focuses on the Yorkshire and the Humber region, as one of the regions leading the recovery of planning applications nationally. However, the data shows that even within this area there are significant differences in the change in planning application volumes across the different authorities.

LPA	May-19	May-20	% (+/-)	Jun-19	Jun-20	% (+/-)
Scarborough Borough Council	54	43	-20%	35	68	94%
Ryedale District Council	40	40	0%	26	47	81%
Bradford Metropolitan District Council	224	284	27%	255	443	74%
Barnsley Metropolitan Borough Council	73	80	10%	79	118	49%
Hambleton District Council	97	132	36%	100	146	46%
Calderdale Metropolitan Borough Council	104	146	40%	117	164	40%
Doncaster Metropolitan Borough Council	135	124	-8%	119	166	39%
Kirklees Metropolitan Council	243	222	-9%	223	298	34%
Harrogate Borough Council	215	223	4%	207	274	32%
North East Lincolnshire Council	56	33	-41%	44	58	32%
Leeds City Council	554	472	-15%	510	657	29%
North Lincolnshire Council	88	82	-7%	93	117	26%
East Riding of Yorkshire Council	246	234	-5%	271	330	22%
Wakefield Metropolitan District Council	133	105	-21%	128	152	19%
Richmondshire District Council	43	48	12%	43	51	19%
City of York Council	156	133	-15%	143	167	17%
Selby District Council	57	58	2%	71	79	11%
Sheffield City Council	306	236	-23%	269	290	8%
Craven District Council	57	54	-5%	69	72	4%
Rotherham Metropolitan Borough Council	106	76	-28%	118	122	3%
Hull City Council	72	67	-7%	67	67	0%

Planning application fees

One of the main concerns from Local Planning Authorities on the impact of COVID-19 is a potential significant loss of fee income from planning applications, equally of concern is the additional costs of responding to the pandemic where some planning and building control departments have needed to divert resources onto front line support services.

During the COVID-19 period our business development team has stayed in regular contact with authorities who have reported varying degrees of impact on application submission and subsequently fee income, but the majority are reporting positive signs in terms of June’s submissions.

The fees table shows that whilst March 2020 realised an increase in fees of 5.4% on March 2019, April and May were hit hard with a combined loss of £9.3M. June’s submissions figures are up on last year, but the fee income was down on 2019 by £750K.

Month	2019	2020	Change (£)	Annual monthly variance
March	£22,353,033	£23,561,097	£1,208,064	5.4%
April	£22,722,047	£19,187,607	-£3,534,439	-15.5%
May	£24,046,669	£18,181,214	-£5,865,454	-24.4%
June	£22,555,314	£21,791,229	£764,084.50	-3.4%

As reported in June, this could suggest that even though volumes have risen, the very largest applications will take longer to recover and come back into the pipeline. These larger schemes cross subsidise the smaller high quantity applications and therefore are a key income stream to sustain planning departments.

Public Practice who work with local authorities on building the public sector’s capacity for proactive planning reported in their recent paper Resilience & Renewal: How is COVID-19 changing public planning? that ‘over the medium-term planning fee income will be subject changes in the market, as well as government reform. Some Authorities are projecting a reduction in planning fee income of 35-45% over the next 6-12 months.’ The report was based on 15 online interviews and 11 survey responses, representing 22 authorities, predominately in London and the South East.

(Source: <https://www.publicpractice.org.uk/resources/resilience-renewal>)

This will certainly add to the Local Authority funding gap where many planning departments are already running at a deficit, with department running costs higher than application fee income.

With reference to new policy reform, we await more detailed information from the government on this but are gearing up for the recently announced permitted development changes on 1 August that change a few prior approval forms and introduce a new permitted development right for ‘New dwellinghouses on detached blocks of flats’. Further information can be found here:

<http://www.legislation.gov.uk/ukxi/2020/632/contents/made>.

Planning application supporting data

Over 500,000 online planning applications get submitted each year across England and Wales. Have you ever wondered what specialist supporting documentation is provided, so that local authorities can process them and issue a decision?

The Planning Portal collects all specialist data as supporting documents, in line with the government's national and local validation checklists, along with all the detailed plans and drawings.

This could provide valuable insight into the range and nature of specialisms, as well as challenges to overcome to ensure a successful outcome through the planning process.

Materials proposed in development

When submitting a planning application, the applicant must provide details of the materials they wish to use for walls, roofs etc, including the type, colour and name of the materials to be used.

Additional information may be provided in a design and access statement or planning support statement or shown on the plans and drawings.

This could provide valuable insight into elements of the environmental efficiency of proposed developments, as well as trends such as costs or evolving consumer preferences.

Sponsorship Opportunities

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

- 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
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What is coming in next months edition?

We hope that the additional information provided in this edition gives further insight into the planning data captured from the Planning Portal.

This month we have focussed specifically on the residential development elements of the Full Planning form and next month will be a condensed August report looking at some of the aspects covered in the last three editions.

With momentum now increasing with the government's building safety programme, we will shortly look into those applications falling within the 'in scope' definition of the programme now that the Draft Building Safety Bill has been published.

Find out more

Throughout the report we have given an indication of the range and depth of planning data which exists and the insight it can provide. Some of the content has been retained exclusively for subscribers.

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 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

Register now for the Planning Portal Virtual Conference 2020

The conference will take place online from 16 – 19 November and will provide 12 hours of content over the four-day event, including speakers and panel discussions covering the most important topics effecting planning and building.

- The agenda will include planning reform, zero carbon targets, and technology in both development management and in the planning process.
- There will be multiple chances to interact with all attendees, exhibitors and speakers for networking opportunities, and live interactions will be held through polls and Q&A sessions.
- The event will happen online this year, helping to keep all delegates, sponsors and exhibitors safe during the uncertain times occurring due to COVID-19.

**To find out more information or to register,
visit**

<https://www.planningportal.co.uk/conference>

Planning Market Insight Report from the Planning Portal

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

