Planning Market Insight Report from the Planning Portal

Insight into proposed development data

May 2020: COVID-19 edition

PLANNING PORTAL

TERRAQUEST DATA SOLUTIONS

Foreword

Since the outbreak of COVID-19, there has never been greater pressures on the construction industry and related stakeholders. We now face a need to understand the impact created by the virus across all aspects of land use and planning.

With many businesses forced to close and home-working imposed where possible, we all find ourselves in unique territory.

Construction has long been a central tenet of government's economic growth strategy but this was brought to a halt by the national lockdown. In the planning arena specifically, many businesses have furloughed staff and some have found creative solutions to manage work remotely. Now, as construction sites start to reopen there has never been a better time to plan ahead.

Obtaining information of what is being planned and where can be difficult and is a key requirement to inform future strategies, business planning and thought leadership in the development industry.

To help with identifying valuable opportunities, trends and insight in planning and building application figures, we are developing a monthly Market Insight Report, available on subscription from June 2020.

Starting with online planning application data first and then including online building control, we can provide a unique dataset exclusively at the point of submission, giving unrivalled access to proposed development trends and allowing an early insight of what's being applied for across England and Wales.

Benefitting from the Planning Portal's exclusive access to the majority of planning proposals and schemes, the Market Insight Report provides an opportunity to plan strategically at the earliest stages within the development planning lifecycle.

Hopefully this sample report will give a glimpse into the data and we are keen to hear about your planning data needs. To contact us with suggestions and to subscribe to our monthly reports, contact us at communications@planningportal.co.uk.

In the meantime, we hope you enjoy this sample!

Sarah

Sarah Chilcott
Managing Director

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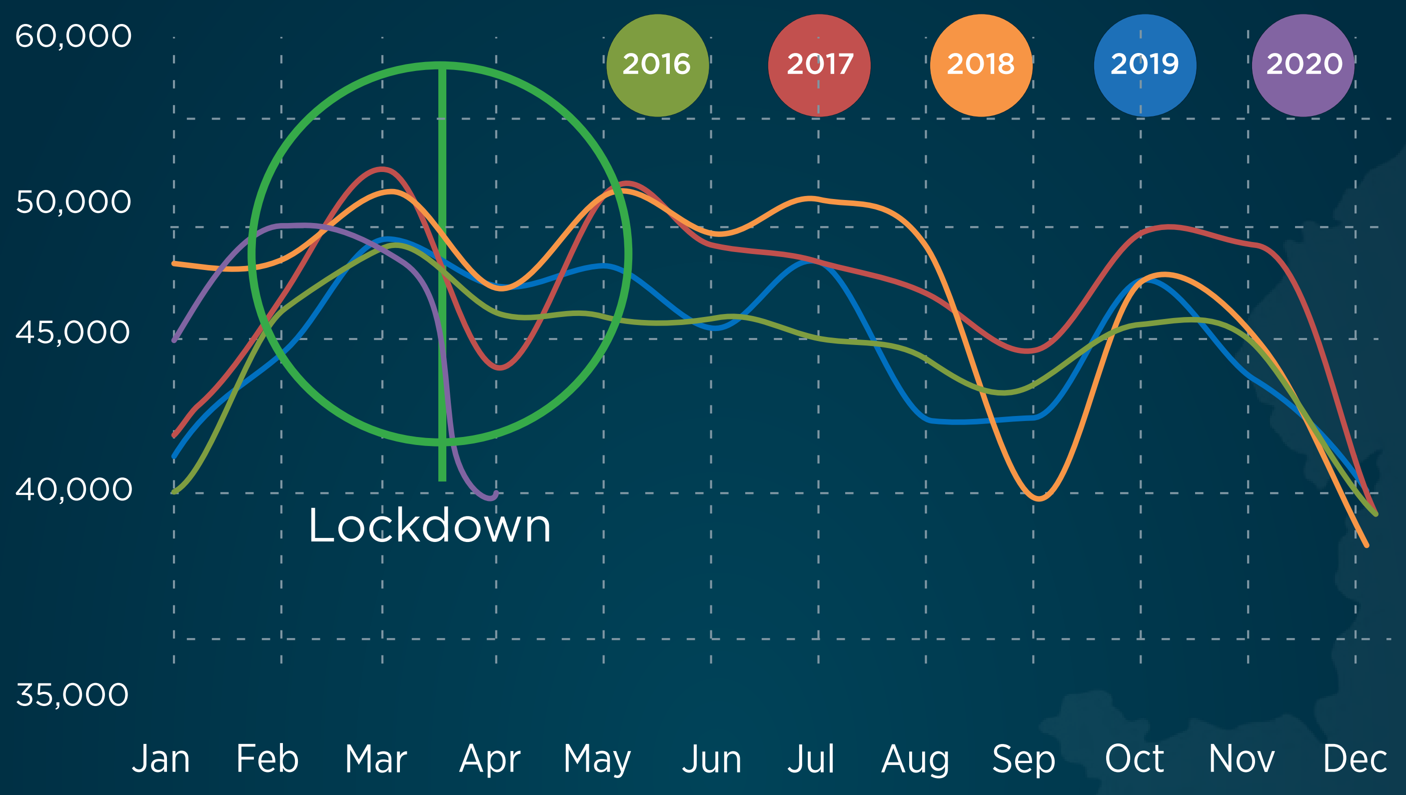
National graph over five years

Application numbers England and Wales



National graph by week

Application numbers England and Wales

The national graph represents the number of online planning application submissions via the Planning Portal in each of the last five years.

Overall submissions have remained relatively consistent, and the general trend sees an increase early in the year.

In 2020, application submissions were on course for a similar trend with good submission numbers in January and an all-time high in February.

March continued this upward trend until the week commencing 23 March when the government announced that the UK was entering into a full-scale lockdown and instituted restrictions on businesses and employees started to work from home.

In comparing March and April 2020 submissions with the previous year, we have seen a reduction of 3.5% in March and a much bigger reduction of 18.5% in April.

There is little doubt that COVID-19 has led to a reaction by some applicants to hold-off submission while they consider the direct impact both financially and operationally to them, their families and businesses.

Only once they have evaluated this can they begin to plan and make informed decisions about whether to postpone or proceed - potentially phasing each stage from submission, gaining three-year permission and then deciding when to start the development.

We continue to monitor this closely via our Monthly Insight Report, taking an in-depth look at submissions nationally, regionally and locally, by application type and by the various proposal types using the wealth of data we have access to.

As we can see applications began to slow towards the end of March in most areas as we moved into lockdown, although there were some signs of daily application numbers recovering a little during April.

Analysis of May data in the next report will provide further insight into this.

The North West was one of the slower regions to be affected in terms of applications slowing in March, but is one of those hit the worst in April.

It is interesting to compare this to government data which also shows the North West to have been one of the worst hit for COVID-19 cases.

GOV.UK data for COVID-19 cases in England and Wales

North East	8,331
North West	20,768
Yorkshire and the Humber	11,298
East Midlands	7,210
West Midlands	14,016
East of England	11,239
London	25,240
South East	17,999
South West	6,657
Wales	10,669

GOV.UK Data From 5th May 2020
https://coronavirus.data.gov.uk/

Regional summary: Applications

March

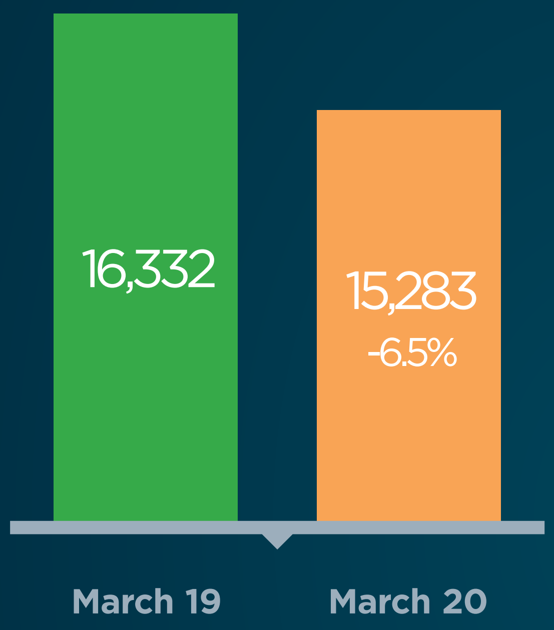
		March 19	March 20
North East	-6%	1,032	1,027
North West	-1%	4,275	4,234
Yorkshire and the Humber	-3%	3,415	3,324
East Midlands	-3%	3,493	3,380
West Midlands	-3%	3,580	4,372
East of England	-5%	6,620	6,312
London	-3%	10,381	10,036
South East	-6%	10,547	9,890
South West	+1%	5,519	5,559
Wales	-8%	1,619	1,487

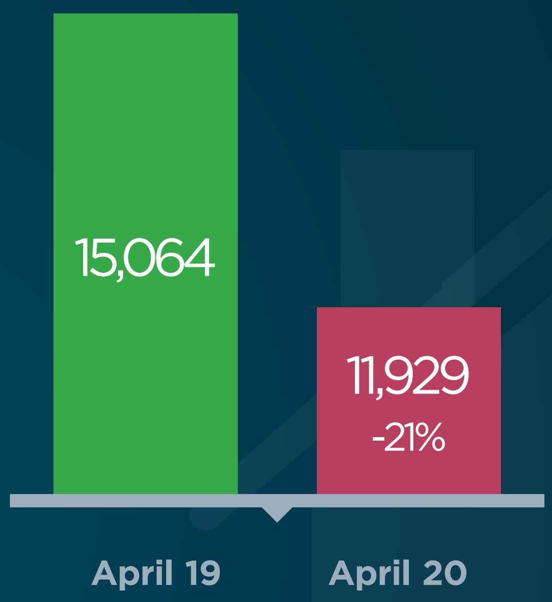
April

		April 19	April 20
North East	-16%	9,93	8,73
North West	-22%	4,129	3,233
Yorkshire and the Humber	-17%	3,182	2,637
East Midlands	-19%	3,266	2,655
West Midlands	-10%	3,314	2,972
East of England	-20%	6,207	4,979
London	-23%	9,722	7,515
South East	-20%	9,906	7,935
South West	-12%	5,200	4,599
Wales	-18%	1,437	1,179

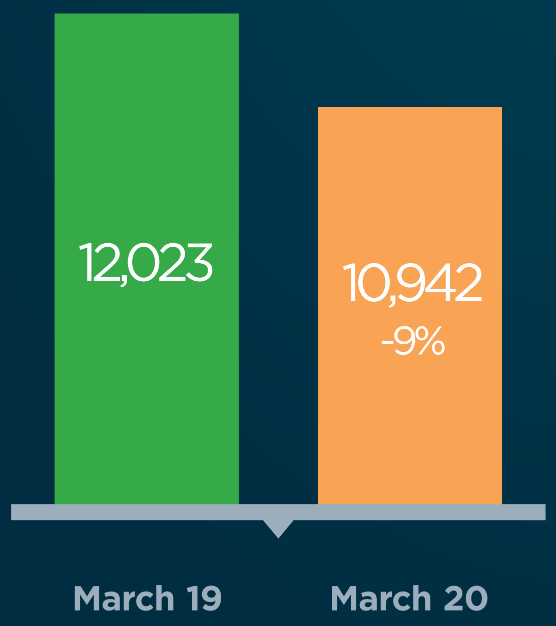
Application types in numbers

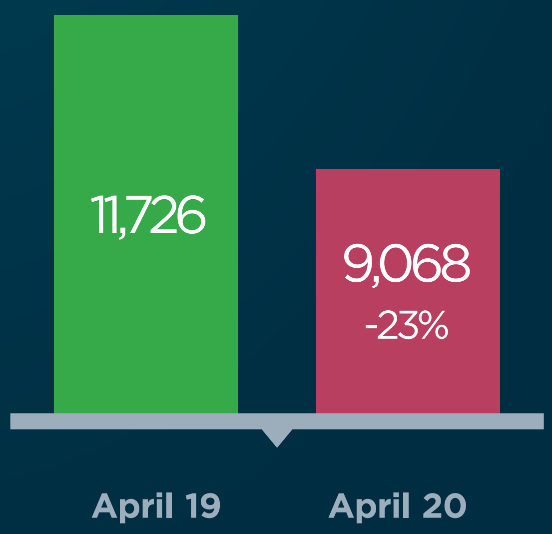
Householder Planning Permission and associated consents



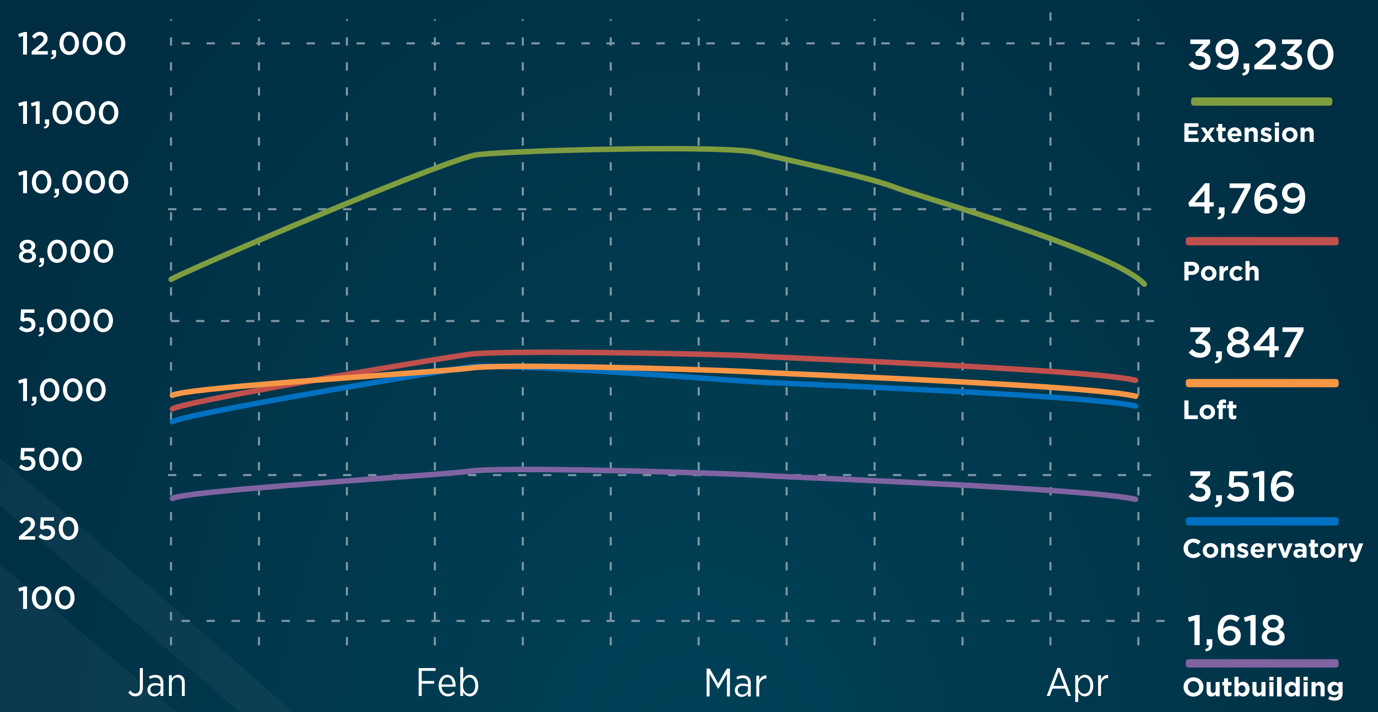


Full Planning and associated consents





Householder applications in detail



Householder applications are the most applied for consent type and we thought it would be interesting to take a closer look at proposal descriptions for these applications for a more in-depth analysis of what is actually being applied for.

We know from the 'common projects' section of our website and Interactive House guidance that these tend to be for conservatories, extensions, loft conversions, outbuildings and porches.

By using a key word search we have presented the results in the table.

It's worth noting that some applications cover a multiple of these types but the data gives a good indication that can be further analysed to be more specific.

Unsurprisingly it shows the greatest proposal type is for extensions, of which there are multiple types - side extension, rear extension, single storey and double storey.

When larger schemes such as residential, commercial or retail developments are proposed, planning regulations allow for an Outline Planning Application to be submitted. This is typically done at an early stage to determine whether the principle of development is acceptable and whether or not a proposal is likely to be approved before any substantial costs are incurred.

Outline Permission can be sought either with all matters reserved or with some matters reserved, meaning that some or all of the details are 'reserved' for a later decision. Either way submission of outline consents can provide a useful insight into the longer-term pipeline of development.

By combining all of the Outline Applications for each month we can see a drop of 9% in March and 10% in April. The fact that these consent types have held up well during the COVID-19 lockdown suggests that the longer-term pipeline for development remains healthy.

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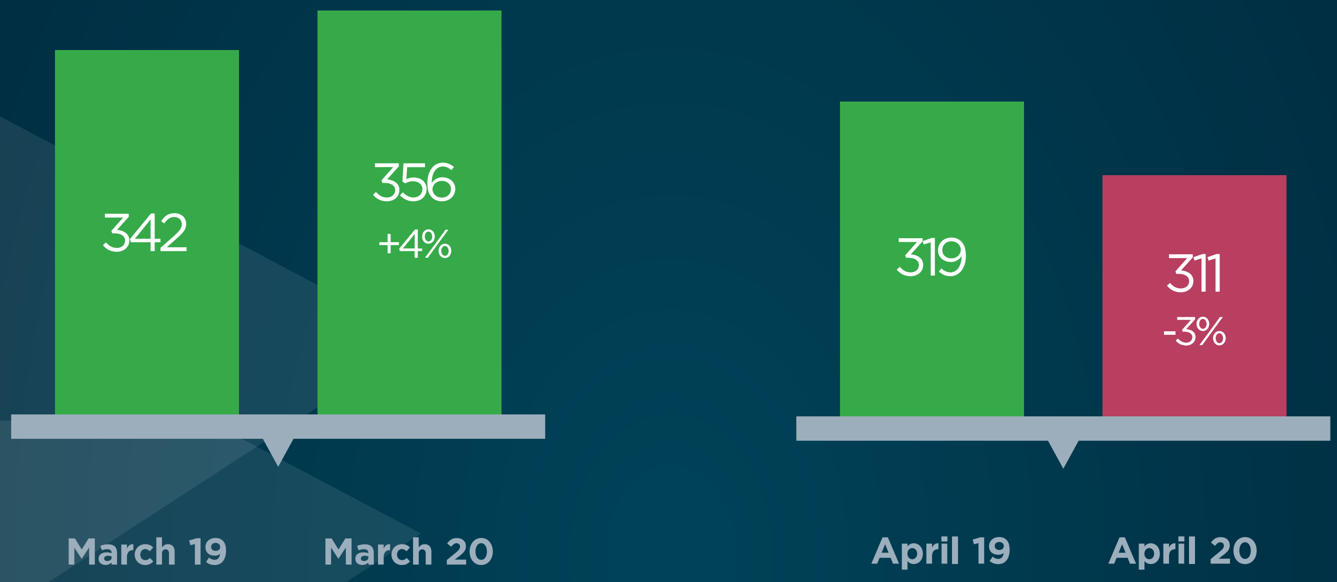
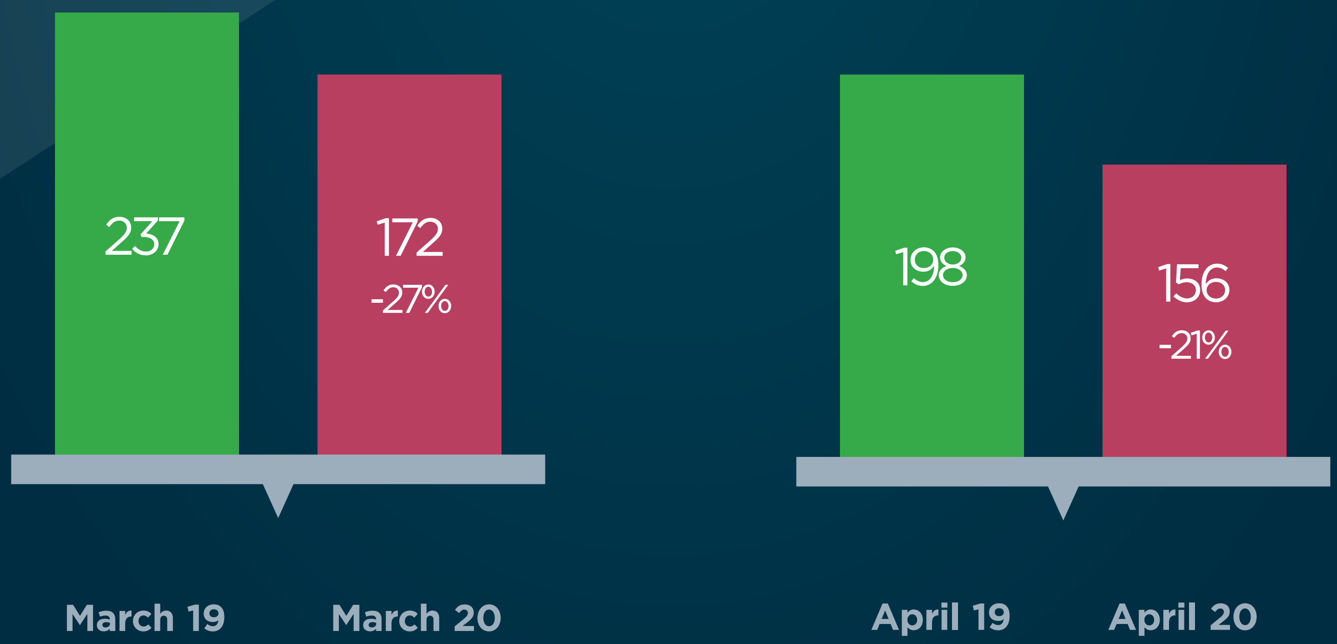
Outline Planning Permission

Outline Planning Permission: Some matters reserved

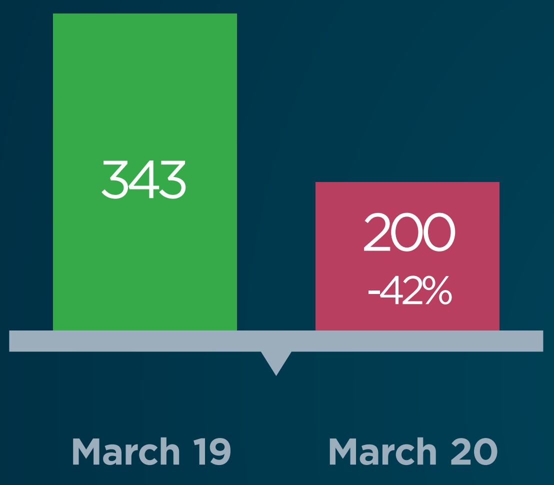


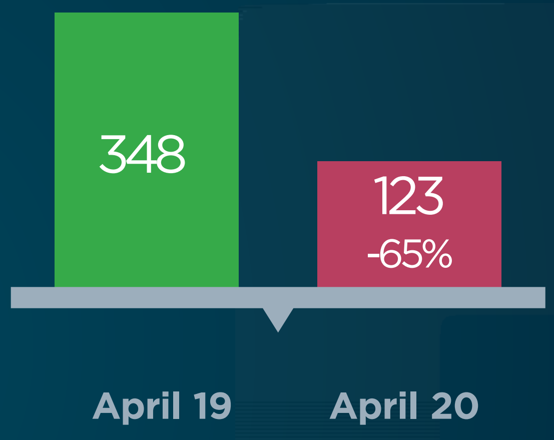
Outline Planning Permission: All matters reserved



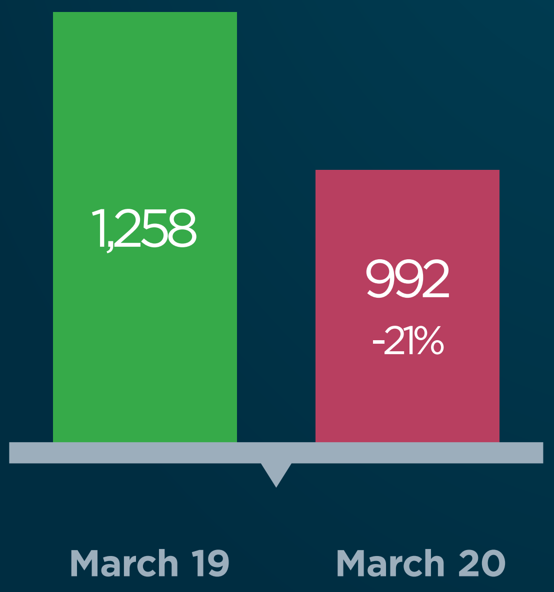
Biggest impact
Advertising applications

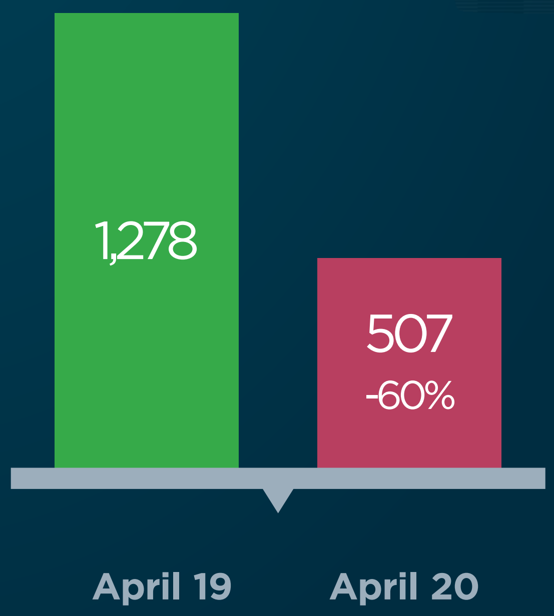
Full Planning and Display of Advertisements





Consent to Display an Advertisement





Advertising consent is required for a range of developments and permission is applied for using two different types of application.

‘Full Planning and Display of Advertisements’ applications covers any development where displaying an advertisement or any commercial signage is included.

‘Consent to Display Advertisement’ is just for advertising hoardings and billboards and includes street furniture such as phone boxes, which have been increasingly popular over recent years for advertising digital media.

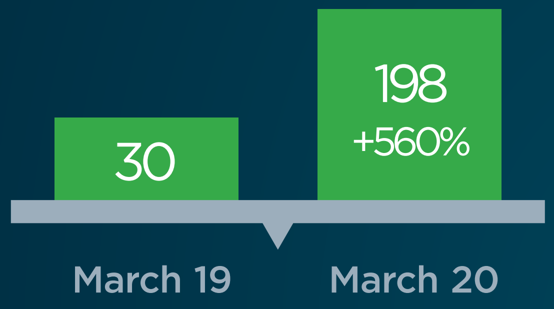
In times of uncertainty, it is unsurprising that there is less rebranding and fewer acquisitions and mergers, as businesses consolidate and review finances to stay afloat. It is equally unsurprising that advertising spend is paused and the big advertising companies therefore reign back any planned expansion of their networks.

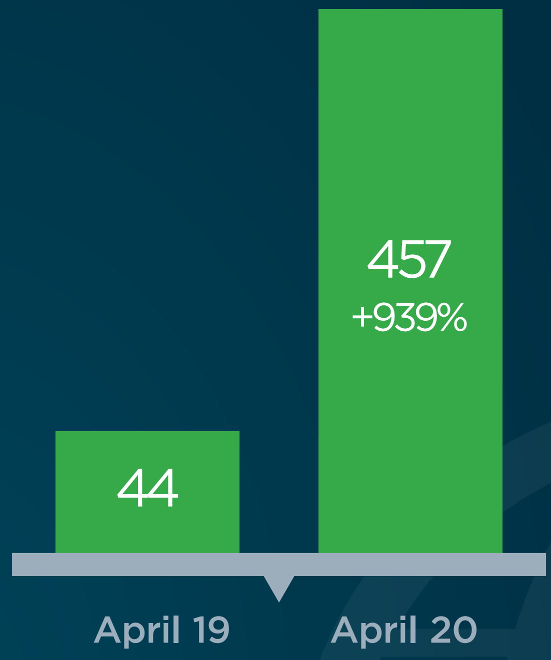
Did you know?

As the home of the national planning application service, the Planning Portal has worked in partnership with every Local Authority across England and Wales to transform the process of planning application submission from a paper-based service to a fully digital process.

Focusing on delivering a quality service to all applicants and professional agents, we have seen growth in the take-up of online submission and now 90% of all applications are submitted online via the Planning Portal.

Prior Approval of Development
by Telecoms Operators





Certain forms of development are permitted development and subject only to prior approval by Local Authorities. This particular type of prior approval (or notification) covers works to telecoms networks or infrastructure.

Interestingly, the data shows that this type of 'application' is up considerably in March and April. From analysing the data in more detail we can see that this is not related to COVID-19, but it demonstrates ongoing investment in 5G networks in particular.

This is in part related to commitments made in the Queen's Speech that all new-build homes should have access to 'gigabit capable' broadband.

With COVID-19 expected to put additional pressure on networks in the medium to long-term, it is reassuring that there has not been any short-term impact on this programme of work. Furthermore, the application data identifies the hotspots for current investment in 5G and other infrastructure which can be seen on the maps.

March

April

Source: Queen's Speech

https://www.ispreview.co.uk/index.php/2019/10/2019-queens-speech-sets-out-uk-gigabit-broadband-plans.html

Top Local Planning Authorities

		March 19	March 20
Westminster City Council	0%	632	635
Leeds City Council	-6%	552	519
Birmingham City Council	-3%	538	520
Cornwall Council	+19%	513	610
Barnet London Brough	-12%	587	517

		April 19	April 20
Westminster City Council	-40%	750	448
Leeds City Council	-11%	525	467
Birmingham City Council	-3%	494	477
Cornwall Council	+18%	477	562
Barnet London Brough	-19%	467	379

The chart above shows the impact on the five Local Planning Authorities who usually receive the highest volumes of planning applications.

As you can see the picture varies greatly across councils. Westminster City Council appears to have been disproportionately affected because they receive a high volume of advertising applications. This is because all signage in Westminster needs to be attached to buildings rather than put in the ground.

It is also worth highlighting that Cornwall figures have risen in 2020 because their 2019 numbers were unusually low, not as a result of the COVID-19 situation. This is because Cornwall introduced the Community Infrastructure Levy (CIL) at the beginning of 2019 and many applicants therefore rushed to get their applications submitted during 2018 before the levy was payable.

Insight into proposed development data

May 2020: COVID-19 edition

We hope that this small sample of our Market Insight Report has given a flavour of the planning data captured via the Planning Portal.

In addition to this report we have a wealth of information provided within all application types that we plan to make available to subscribers.

This helps with identifying valuable trends and insight in planning and building control applications at the key stage its being applied for.

In next month's report we will be taking a greater look into the Full Planning application data to gain further insight into the myriad of different proposal types.

We're keen to understand what application data may be useful to your business and can be included in future reports.

To learn more about what is available or to register your interest in subscribing, please get in touch at

communications@planningportal.co.uk

Planning Market Insight Report from the Planning Portal

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