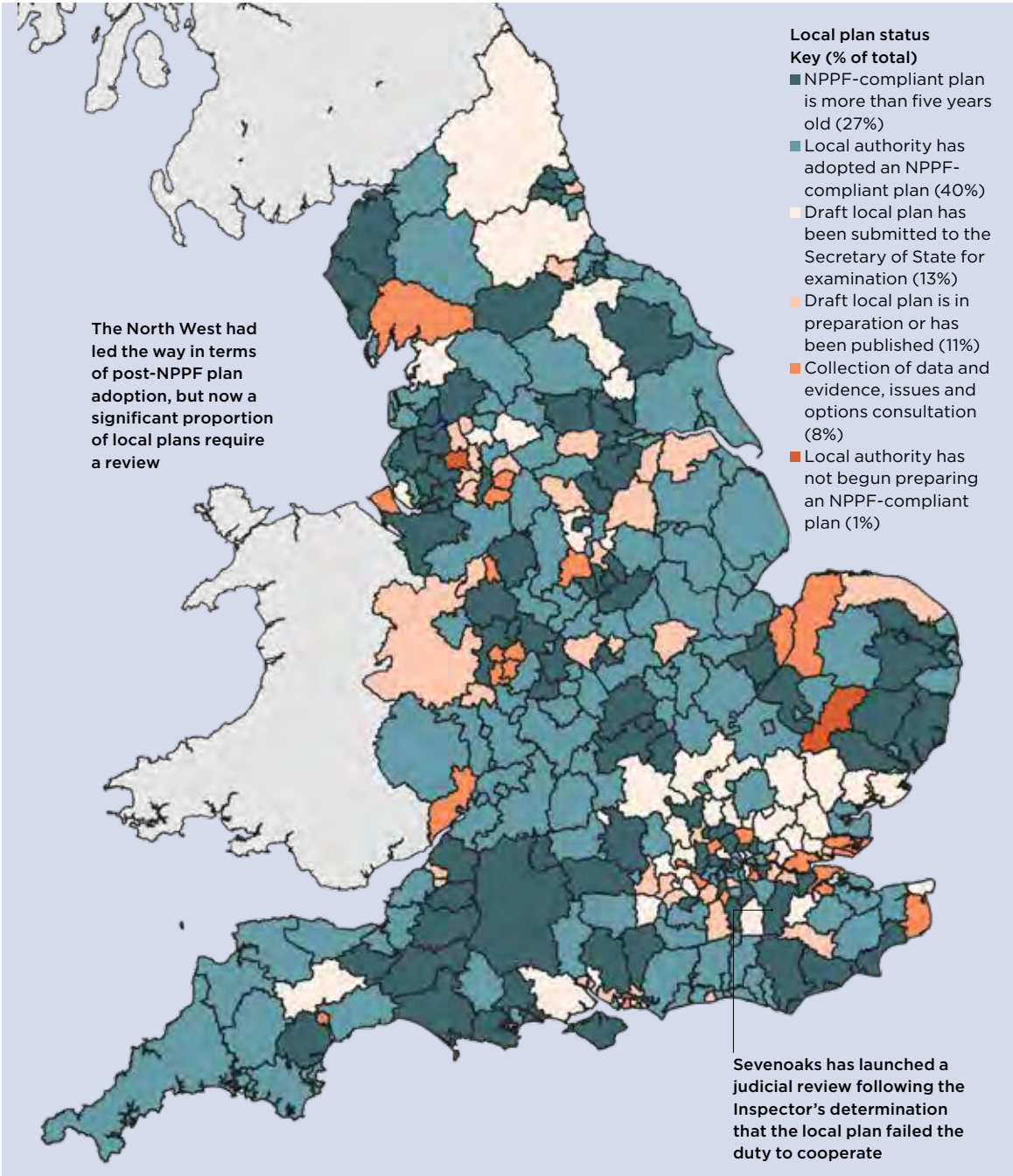


Planning Data Update



Source Savills Research, up to date as of 6 April 2020

Key findings

Local plan status

67% of local authorities have adopted a post-NPPF local plan - up from 58% in 2019

40% of adopted post-NPPF plans are over five years old and due for a review

131 local authorities have an up-to-date post-NPPF plan

14,500 The annual shortfall of homes, given that adopted local plan targets are equivalent to 91% of housing need under the standard methodology

37% of housing need under the standard methodology is located in local authorities yet to adopt a local plan

Source Savills Research

Local plan delivery

Plan making increases, as does the number of plans now due for review

In the year to 31 March 2020, an additional 21 local authorities adopted a local plan. This means that 67% of local authorities have successfully adopted a plan since the introduction of the NPPF in 2012.

The government has set a new target of 2023 for the adoption of post-NPPF plans. On average, it takes 20 months

from submission for examination to adoption, so the 44 local authorities currently at examination stage should be able to meet this deadline. However, the 64 local authorities yet to submit their local plan for examination may struggle unless there are further reforms to speed up the plan-making process.

Local plans adopted soon after the introduction of the original NPPF in 2012 are now becoming out of date at the same rate as new local plans are adopted. Some 40% of adopted post-NPPF plans are now over five years old and, therefore, due to be reviewed. Only 131 local authorities have an up-to-date post-NPPF plan.



Five year land supply

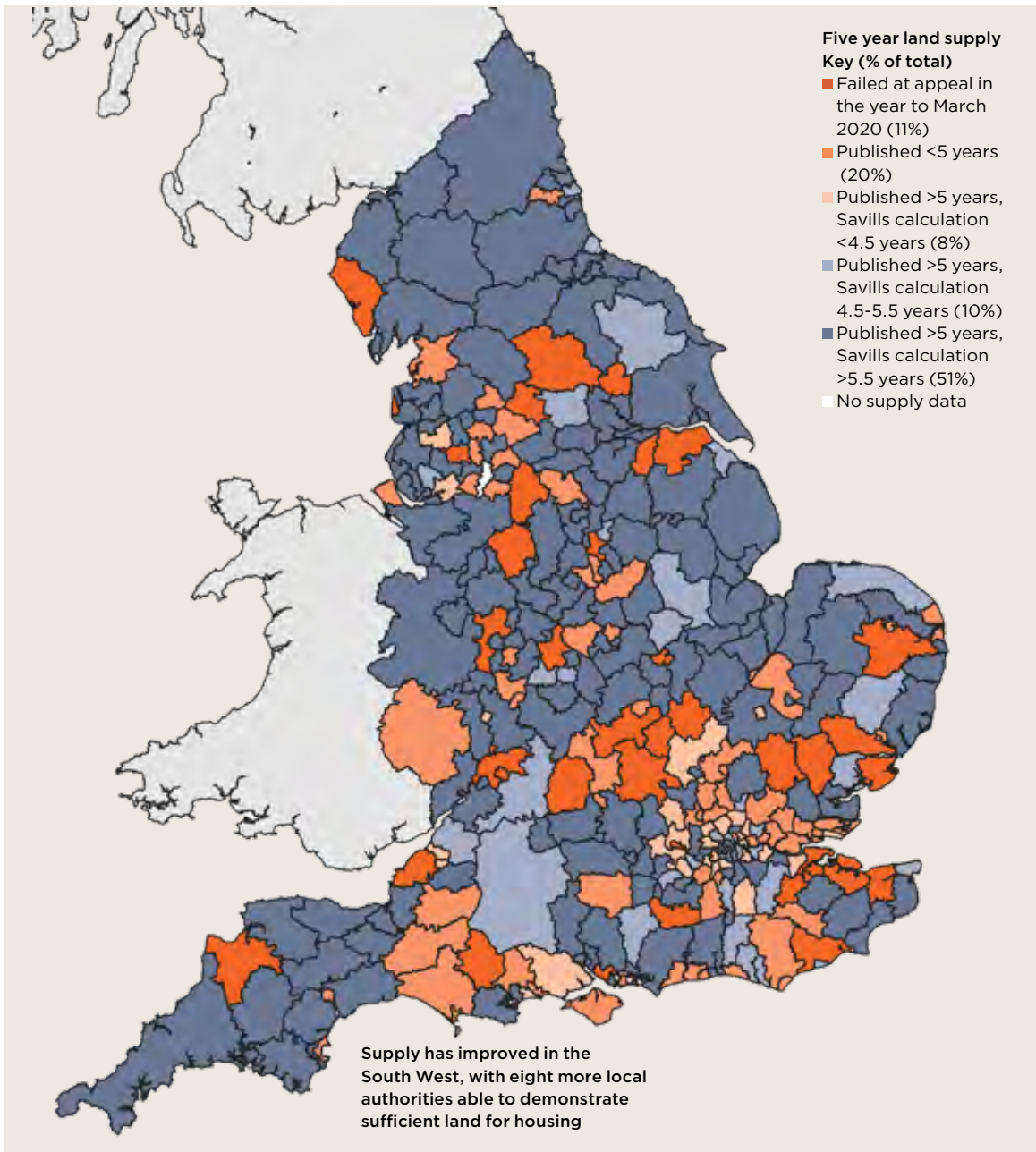
Local authorities are still falling short on five year land supply

Identifying enough land for housing development remains a challenge for many local authorities, with 11% of local authorities having a lack of five year land supply confirmed at appeal in the year to March 2020. On the positive side, this is a decrease on the 15% of local authorities with significant appeals disproving their land supply in the previous year.

Of those who failed at appeal, 52% claimed to have more than five years' supply. More local

authorities (25%) acknowledged through published data that they had less than five years' supply compared to the 18% doing so last year.

Planning for a flexible land supply remains as important as ever. Meeting a range of housing needs, and a range of different sites, of varied scale and location will best improve the prospects for delivery. This must be a priority now, more than ever, to aid the economic recovery post Covid-19.



Source Savills Research, up to date as of 6 April 2020

Key findings

Five year land supply

6.1 years

As of March 2020, local authorities average 6.1 years of land supply. This is an increase from 5.97 years in November 2019

14%

of local authorities unable to demonstrate a five year land supply also do not have an up-to-date local plan

33%

of those who failed at appeal have yet to adopt an up-to-date local plan

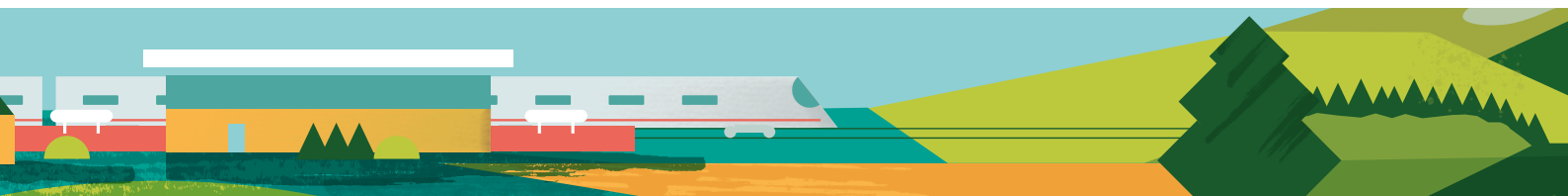
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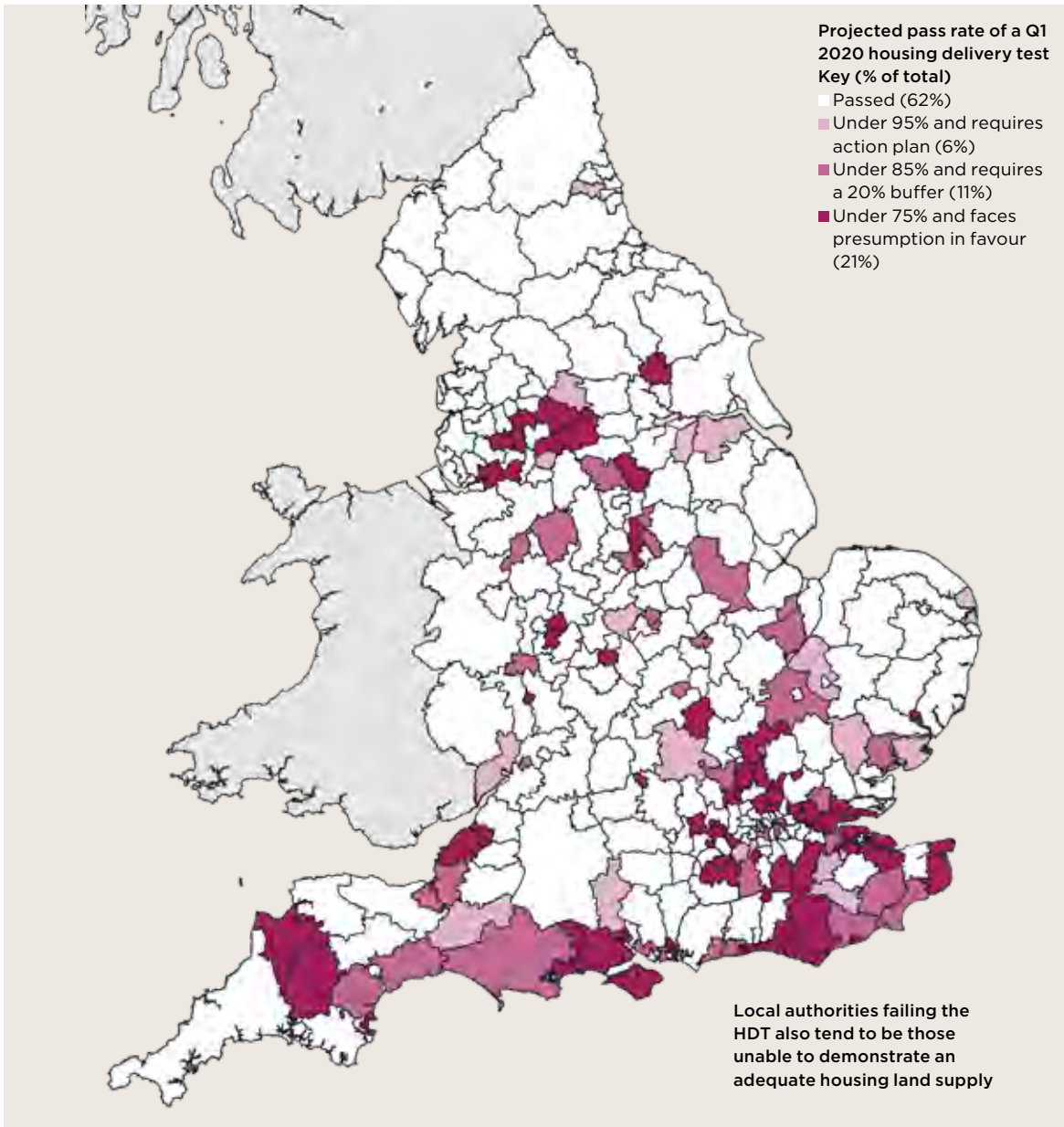
The number of repeat offenders that had a lack of land supply confirmed at appeal in the year to March 2019 and the year to March 2020

Source Savills Research

Methodology

We have applied a simple five year land supply calculation to all local authorities in England using the LPA published supply figures. No adjustment has been made to the supply, and the methodology does not impose any different treatment of the basic requirement other than it being annualised (spread equally over the next five years). The map indicates categories based on the result, which allows a like-for-like comparison between authorities and echoes the arguments being used in appeals based on five year land supply across the country.





Key findings
 Housing delivery test (HDT)

6.8 years
 Average land supply of local authorities that passed the 2019 HDT

5.7 years
 Average land supply of local authorities that failed to deliver 95% of need and have to produce an action plan

4.3 years
 Average land supply of local authorities that required a buffer for delivering less than 85% of need

4.3 years
 Average land supply of local authorities that face presumption in favour for delivering less than 75% of need

Source Savills Research

Housing delivery test

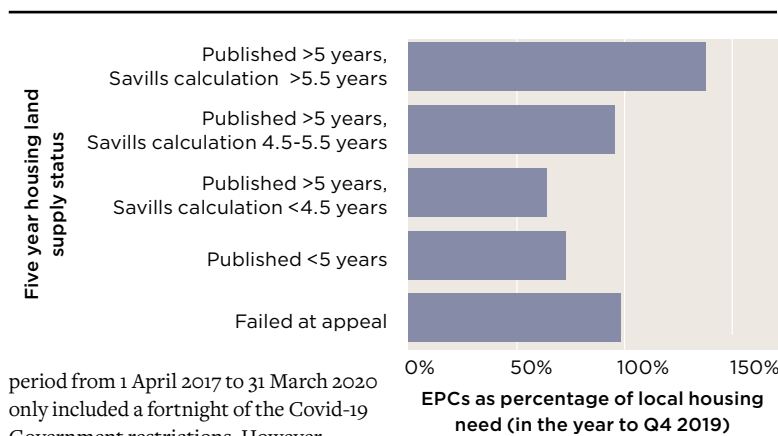
Many local authorities are at risk of losing full control of their planning policy

Housing land supply is further complicated by the housing delivery test (HDT). The test requires that local authorities that fail to deliver at least 85% of their housing need should provide an additional 20% buffer over and above their target level of provision.

After the results of the 2018/19 HDT were published, 14 local authorities lost their five year land supply, a consequence of having to apply a 20% buffer.

Based on EPC data, we project that 101 local authorities will miss this threshold for the 2019/20 test and will have to apply a 20% buffer; 10 will no longer be able to demonstrate an adequate housing land supply.

We do not expect any changes to the HDT this November, as the monitoring



period from 1 April 2017 to 31 March 2020 only included a fortnight of the Covid-19 Government restrictions. However, local authorities may call for a relaxation of the test from 2020/21, as the impact of the construction shutdown is felt.

Source Savills Research



20 local authorities have less than 2.5 years of land supply and are, on average, only meeting 71% of local housing need (LHN). 62 authorities have more than 2.5 years but less than 5 and are, on average, meeting only 76% of LHN.

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