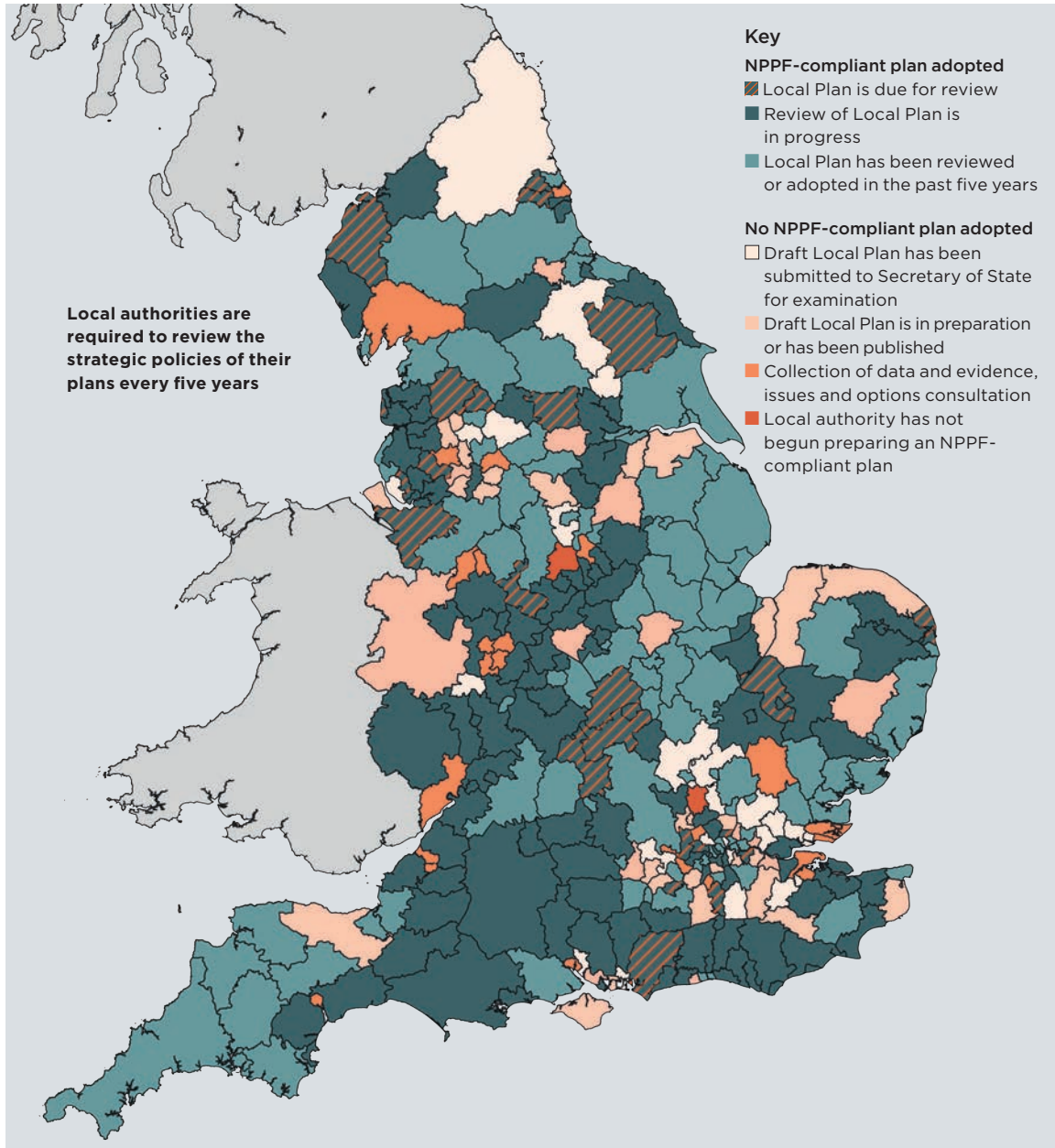


Planning Data Update

savills



Source: Savills Research

Key findings Local plan status

71%

of local authorities have adopted an NPPF-compliant plan – up from 67% in 2020.

8%

of adopted NPPF-compliant plans are over five years old and yet to be reviewed.

Of local authorities currently reviewing...

32%

are pre-emptive, reviewing plans that are less than five years old.

32%

of housing need under the standard approach is located in local authorities yet to adopt a local plan.

Source: Savills Research

Local plan status

Increased plan adoption will help Government targets for delivery

In the year to March 2021, 21 local authorities adopted either a new local plan, or a reviewed version of an already NPPF-compliant plan. In total there are now 224 local authorities with an NPPF compliant plan, accounting for 71% of total authorities in England. Between them, these local authorities have delivered an average of 175,000 homes each year over the

past three years, 74% of the total delivery. Local authorities with plans in place are better equipped to deliver homes at volume, and increased plan coverage will certainly help the Government's target delivery of 300,000 homes per annum.

Following adoption of plans, the NPPF requires local authorities to review the strategic policies of their

plans every five years. Many areas are pro-active in their approach, with 35% across England currently reviewing their NPPF-compliant plans. However, there is a slight danger of complacency in other areas, with 8% of local authorities having adopted a NPPF-compliant plan over five years ago, but yet to start the formal review process.



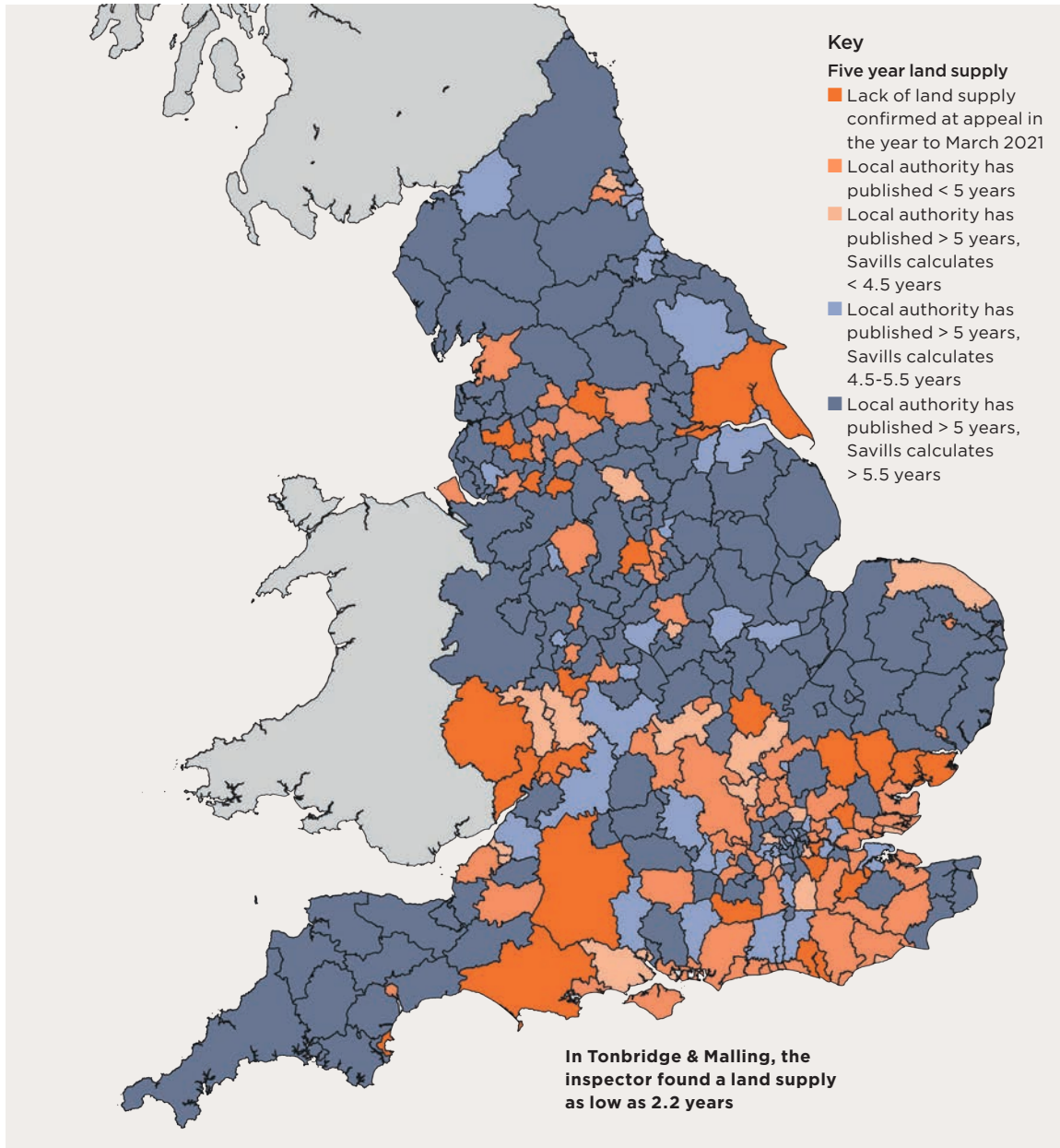
Five-year land supply

Appeal decisions are highlighting serious land supply issues

Land supply remains a key issue for many local authorities in England, particularly those in areas heavily affected by land constraints like Green Belt, National Parks and AONB. Without a demonstrable supply of

deliverable land, local authorities risk having planning decisions made for them at appeal. In the year to March 2021, 7% of local authorities had a lack of five-year land supply confirmed at appeal. While land supply didn't have

a material impact on all decisions made, it did help sway favour away from the councils, all of whom have a duty to ensure enough land is available to sufficiently meet the housing needs of their residents.



Source: Savills Research

Key findings

Local supply

6.1

years, the average land supply position across English local authorities in April 2021, this was the same as the previous year.

15%

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

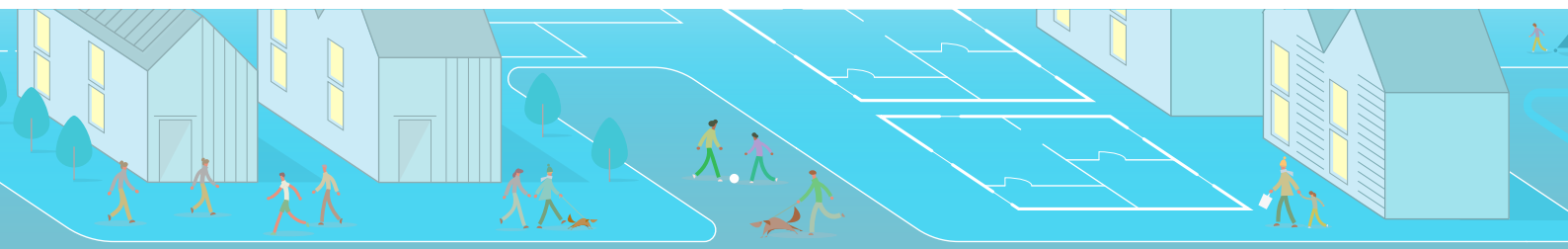
32%

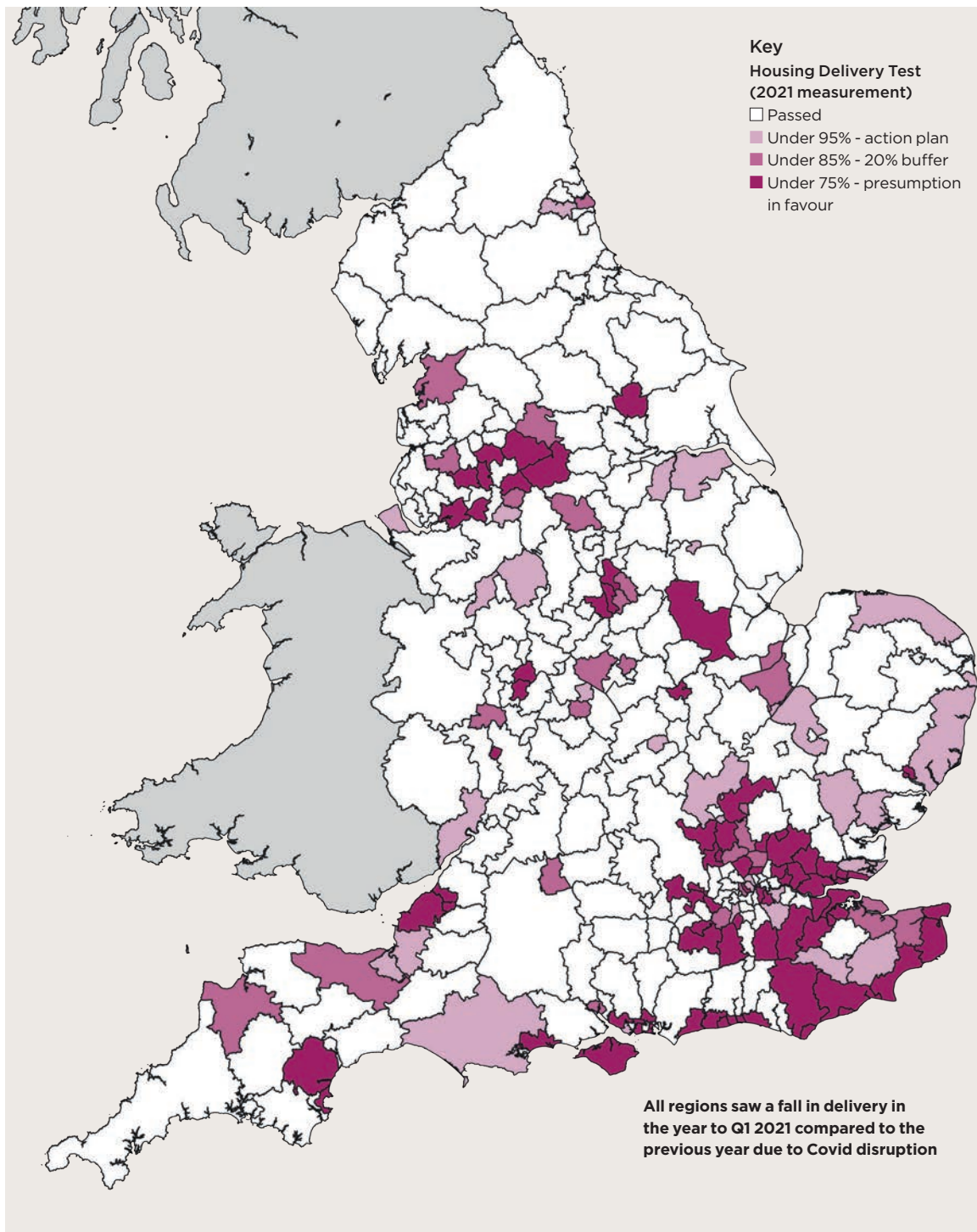
of those who had a lack of land supply confirmed at appeal have yet to adopt an NPPF-compliant local plan.

124,313

Under the standard methodology, there is a total housing need of 124,313 homes per annum across local authorities that are unable to demonstrate a five-year land supply according to Savills calculation.

Source: Savills Research





Key findings Housing Delivery Test

61%

of local authorities are expected to pass the 2021 Housing Delivery Test, while 23% will fail to deliver 75% of their housing need.

54%

of local authorities that are expected to pass the test have adopted an NPPF-compliant plan.

71%

of local authorities failing the test are unable to demonstrate sufficient land supply according to Savills calculation.



It is likely that housing need figures for the 2021 test will be revised down due to disruption to the construction sector as a result of lockdown measures introduced in March 2020.

Source: Savills Research

Housing delivery test

Reduction to need figure expected to accommodate Covid disruption

We expect only 61% of local authorities to pass the 2021 Housing Delivery Test and 23%, 72 local authorities, to deliver less than 75% of their housing requirement and fall under the presumption in favour of sustainable development.

The greatest concentrations of local authorities to fail the test are located in and around Greater Manchester and Greater London. And most have large parts of their area designated as Green Belt.

It is likely that the actual results,

not expected until the end of the year, will be better than this. The housing requirement in the 2020 test was reduced by a month to reflect the disruption at the end of Q1 2020. It is likely that there will be a more substantial reduction in the 2021 test.



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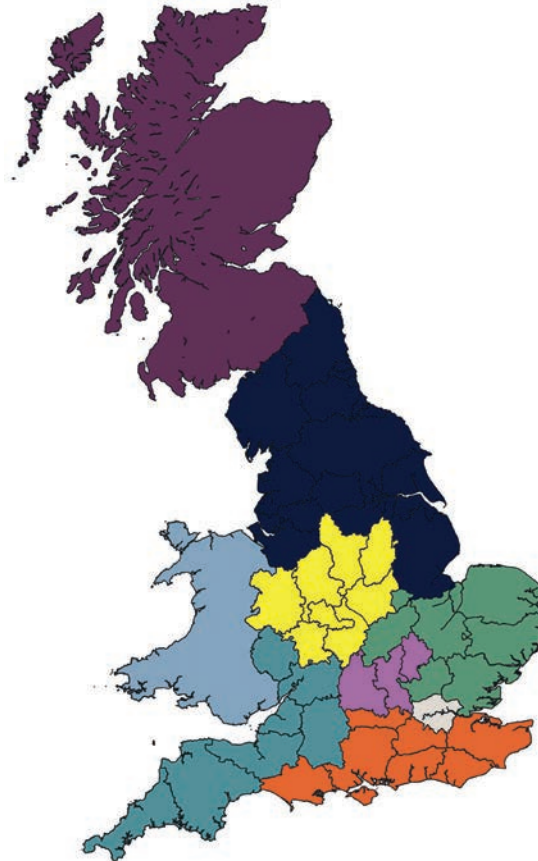
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