# Appendix C: Land banks data sources

C.1     We have used the following datasets to analyse land banks and development activity, particularly of a selection of top 11 housebuilders in GB:

   (a)    Site-level data on all short-term and long-term land held by the top 11 housebuilders, obtained directly from these housebuilders ('land banks data') see details below;

   (b)    Data on planning permissions, obtained from the data provider Glenigan ('permissions data') see details below;

   (c)    Data on mid-year population estimates dated June 2021[1]; and Standard Area Measurements for administrative areas dated April 2023[2] from ONS; and

   (d)    Publicly available datasets on various administrative-level boundaries in GB. These datasets are used to define the local areas where people live, travel to work or access local services in the community using mapping software[3]:

      (i)    Local Planning Authority (LPA) areas, Local Authority (LA) areas, Travel to Work Areas (TTWA), urban areas for England and Wales from ONS;[4]

      (ii)   The 2016 urban- and rural-area classifications for Scotland[5]; and

      (iii)  The December 2022 boundary-line dataset for built-up areas covering GB from the Ordnance Survey.[6]

## Land banks data

C.2     We selected 11 large housebuilders ('top 11 housebuilders') for the purpose of analysing site-level land holdings. These housebuilders, which together accounted for c.40% of new homes built in 2022,[7] were selected both on the basis of their size (measured in terms of homes built per year), their likely significant land holdings (since larger housebuilders are likely to have more substantial land banks), and to ensure we had good geographical coverage across the regions of England and the nations of Scotland and Wales.

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[1] ONS's Mid-year population estimates for UK dated June 2021
[2] ONS's Standard Area Measurement dated April 2023
[3] CMA analysis has used ArcGIS Pro - Version: 3.0.2.
[4] Open Geography Portal (statistics.gov.uk)
[5] Scottish Government SpatialData urban rural classification
[6] Ordnance Survey Open Built Up Areas data dated December 2022
[7] Based on annual reports of housebuilders, England: Live tables on housing supply: net additional dwellings - GOV.UK (www.gov.uk), Scotland: Housing statistics quarterly update: new housebuilding and affordable housing supply - gov.scot (www.gov.scot), Wales:  New dwellings completed by period and tenure (gov.wales). These figures are an approximation as different housebuilders have different financial year ends which do not always align with the dates used for compiling housing statistics.

C.3    We asked the top 11 housebuilders to provide us with the following information for the calendar year 2022:[8]

(a)    Location details of the short-term and long-term sites they own or (in the case of long-term sites) on which they have an option;

(b)    The number of plots remaining to be completed for short-term sites, and an estimate of the number of plots on each long-term site;

(c)    The name of the LA area where the sites are located; and

(d)    Other details that relate to the type of land (eg, greenfield/ brownfield land) for all sites, the ownership status of each long-term site, the type of contract that is in place to purchase each long-term site, and whether each long-term site is allocated in a LPA's local plan.

C.4    Although this data gives us a more granular picture of land ownership than is possible with publicly available data, there are some limitations. First, it does not capture any changes in the ownership of sites since the end of 2022. Second, the plot number estimate for each long-term site is tentative, since by their nature long-term sites' development potential is less certain. However, analysed together with our other sources, it helps us build a picture of land control across the regions and nations of GB.

## Permissions data

C.5    Glenigan is a company that collates and provides construction project sales leads, market analysis, forecasting and company intelligence in the UK. They collect and update data on planning applications, non-planning projects and live construction projects.[9]

C.6    We have purchased and used the following data collated at the LPA area level:

(a)    Planning applications currently live and going through the planning process;

(b)    Projects where construction has started but is not yet completed; and

(c)    Projects that were completed over the period 2020 to 2022.

C.7    We have used the following data, available for four three-year time periods: 2012 to 2014; 2015 to 2017; 2018 to 2020; and 2021 to 2023.

C.8    There are some limitations to this data. First, this data is collated from commercially available public sector data sources that may not be fully up to date.

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[8] Berkeley Group provided data for the financial year 2021/2022.
[9] Construction sales leads and industry insight | Glenigan

Second, the data is collated on development sites of at least 10 units and so does not hold all planning approvals granted in each year. Third, this data provides the planning permissions granted but not yet complete by the first quarter of 2023. This means that some of the planning permissions granted, particularly in earlier years, may have potentially been built out in the meantime, while larger projects that take longer to complete remain in the dataset. As a result, some developers may appear to have a larger number of permissions than they currently do.

C.9    In spite of these limitations, we have concluded that this is the best available data on planning permissions and is widely used by organisations with an interest in the sector, and therefore that it is a useful supplement to our other sources. In particular, the permissions data gives us important information about the presence of housebuilders besides the top 11 in local areas, and therefore helps us understand more fully competitive dynamics at the local level.