



TARGETS DON'T BUILD HOMES

National Planning Barometer **2025**



CONTENTS

05	INTRODUCTION
06	METHODOLOGY
08	STATE OF THE HOUSING CRISIS
10	DELIVERY CHALLENGES
14	RESPONSE TO 1.5 MILLION HOMES TARGET
18	IMPACTS OF POLICY CHANGES TO AFFORDABLE HOUSING
22	RESPONSE TO GREY BELT AND NATIONAL SCHEME OF DELEGATION
24	CONCLUSION



The government has introduced sweeping planning reforms after years of historic under-delivery of new homes.

Nearly one year in, how do the people on the front line of housing delivery feel the reforms are working?

INTRODUCTION

A new dawn has broken, has it not?

When the Labour government came to power in July 2024 it did so promising to get Britain building. In the last full year before it came to power, the supply of new housing in England and Wales reached 234,000 completions, well below the Conservative government's target of 300,000 homes per year.

In response to this, Labour set an ambitious target of delivering 1.5 million homes in England by the end of the parliament, requiring a level of housebuilding not seen since the early 1970's.

To achieve this aim, Labour has wasted no time in implementing sweeping planning reforms, reintroducing mandatory housing targets, introducing development of the "Grey Belt" and pledging a national scheme of delegation to fast-track planning consents.

Less than a year into this parliament is too early to judge the overall effectiveness of Labour's planning reforms. However, the Office for Budget Responsibility (OBR) has already predicted that the 300,000 homes per year target won't be hit until the final year of this parliament (2028/29) leaving the government 200,000 homes short of its 1.5 million target.

Over the past forty years, the supply of housing in this country has failed to keep pace with demand. The housing crisis is well established and widely acknowledged, and only radical action will be enough to make up for the large shortfall in supply.

The National Planning Barometer

For the fifth year running, SEC Newgate presents the only nationally representative study of councillors sitting on planning committees across England, exploring their perspectives on the planning system.

This year, our study has explored the attitudes of planning committee members towards Labour's planning reforms, whether they feel these will have a material impact on the housing crisis and if not, why not.

The 2025 edition of the National Planning Barometer has seen the highest response rate since its inception with councillors up and down the country providing their expertise to give the report its clearest set of results yet.

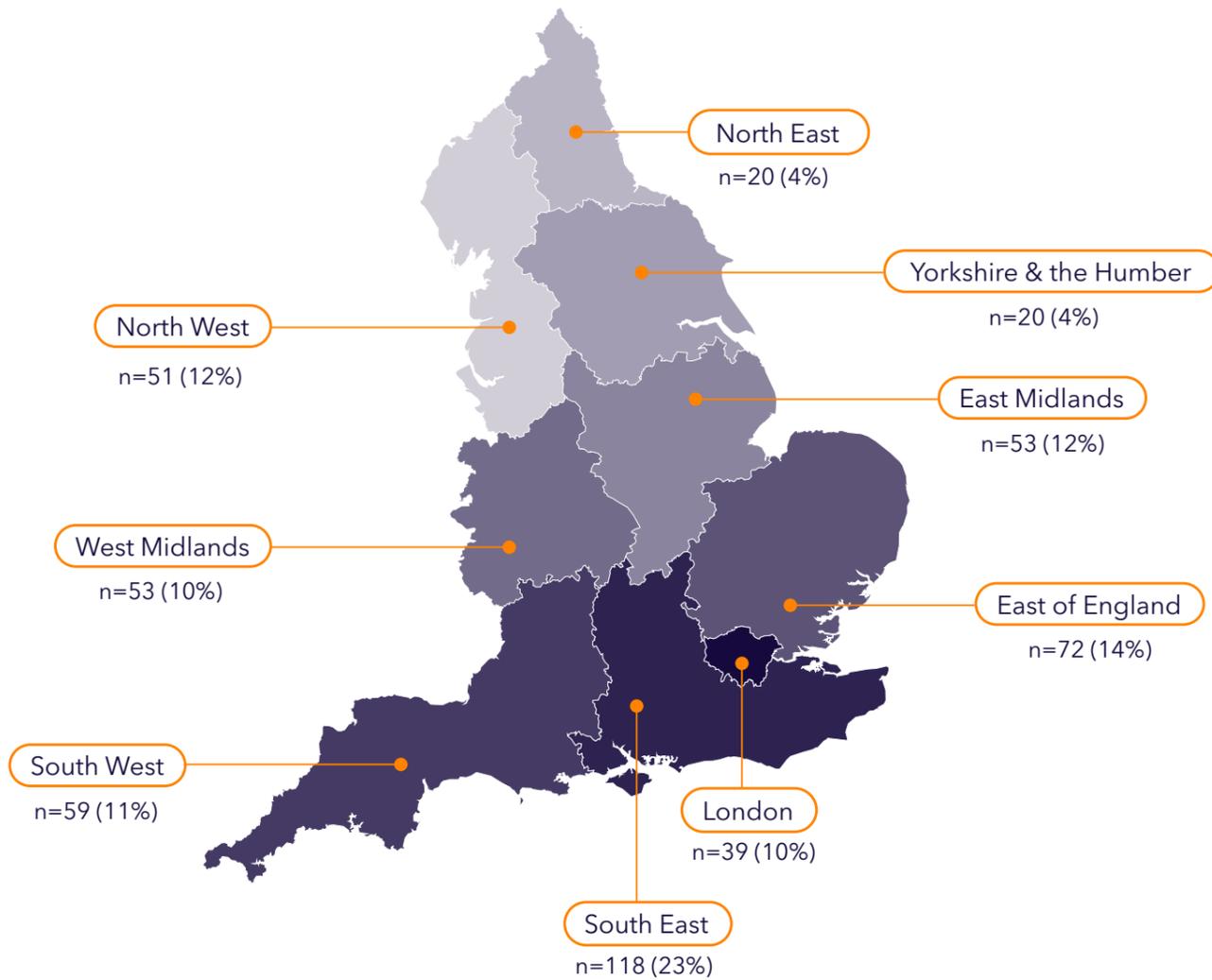
What councillors have revealed is a stark contrast between the reforms being introduced at Westminster and the reality on the front line of housing delivery.

METHODOLOGY

For the fifth year running, SEC Newgate UK has conducted the National Planning Barometer, the only national survey with councillors who sit on planning committees across England.

Amid sweeping reform of planning policy, the 2025 study saw the highest response rate since its inception, with n=485 councillors (sitting across 228 local authority areas) participating.

Fieldwork took place between 26th February and 7th April and data was post-weighted to be proportionate to the number of councillors in England by region.





THE UK'S HOUSING CRISIS REMAINS SEVERE

Setting the scene for high housing need and the prioritisation of affordable housing by councillors.

The National Planning Barometer reveals that in 2025, the UK's housing crisis is persisting, with 92% saying it remains a crisis or has worsened (compared to 94% in 2024). At a local authority level, 3 in 4 councillors (77%) say the housing crisis is severe in their local authority.

To underscore the gravity of the housing crisis, the study found that **over half of councillors (51%) state a need for temporary and emergency accommodation** in their local area.

Out of an extensive list of priorities in their authority areas, councillors in 2025 continue to prioritise the provision of affordable housing for future generations as a top priority (74%). This sense of priority is reflected in councillors' views on the types of housing tenure needed within their authority areas, with over 8 in 10 councillors saying their local area needs more social and affordable housing, similar to the 2024 findings.

2025 councillor priorities also demonstrate an interesting shift in the perceived importance of delivering on housing targets. This has seen a significant increase from 40% rating this as a top 5 priority in 2024, to 54% in 2025, indicating that central government policy focus is starting to impact the local government mindset.

51%

Need emergency and temporary accommodation in local area

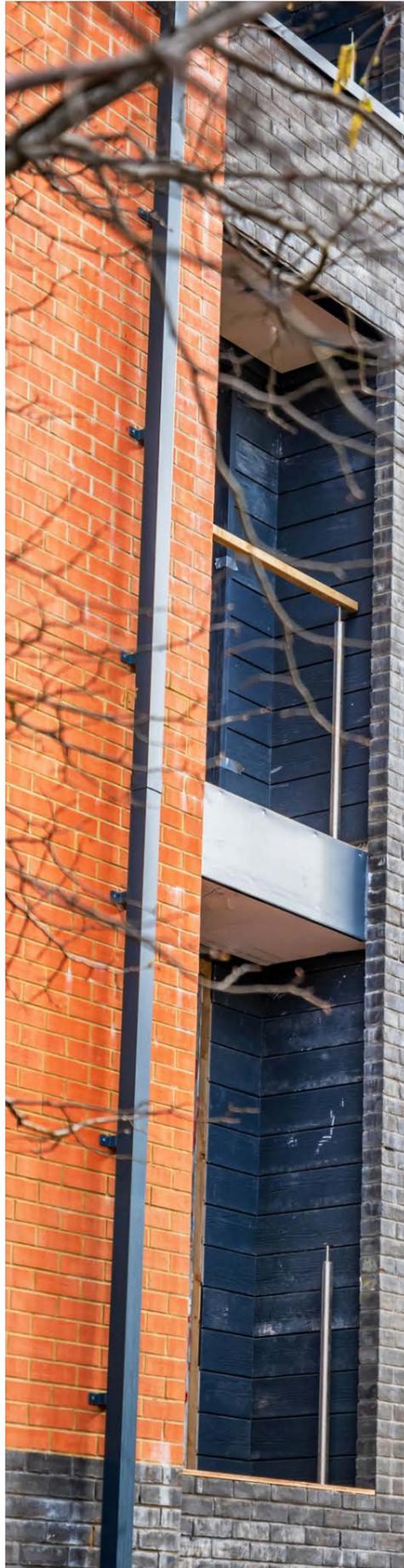
85%

Need social rental homes in local area

83%

Need affordable housing in local area

Source: National Planning Barometer 2025. Q1: What are the top five priorities in your authority area for 2025? Q2: Over the last 12 months, do you think the UK housing crisis has got better or worse? Q3: To what degree would you say there is a housing crisis in your authority area? %s shown for this question are 6 or higher out of 10 on a 10 point scale. Q4a: Which housing TENURES does your Authority need more of? Q4b: Which types of SPECIALIST AND LIFE-STAGE housing does your Authority need more of? Base: Total 2025 n=485



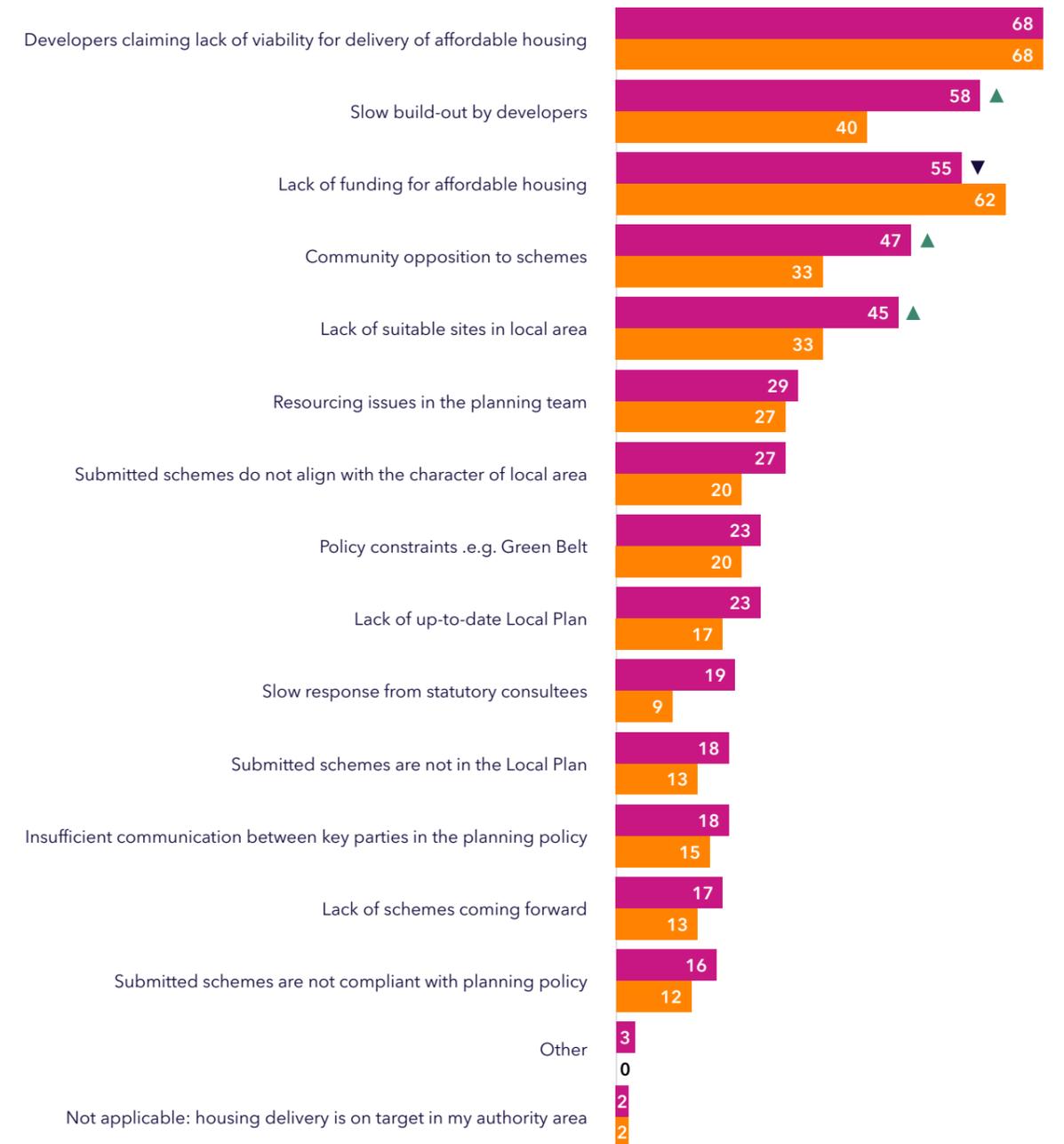
KEY DELIVERY CHALLENGES HAVE WORSENERD OVER THE LAST YEAR

In 2025, the same key challenges to housing delivery persist from 2024, with developers perceived as being key to blocking delivery. 7 in 10 councillors (68%) cite developers claiming lack of viability for delivery of affordable housing as the top delivery challenge. And we see an 18% jump in councillors citing slow build out by developers, (58% in 2025 vs. 47% in 2024).

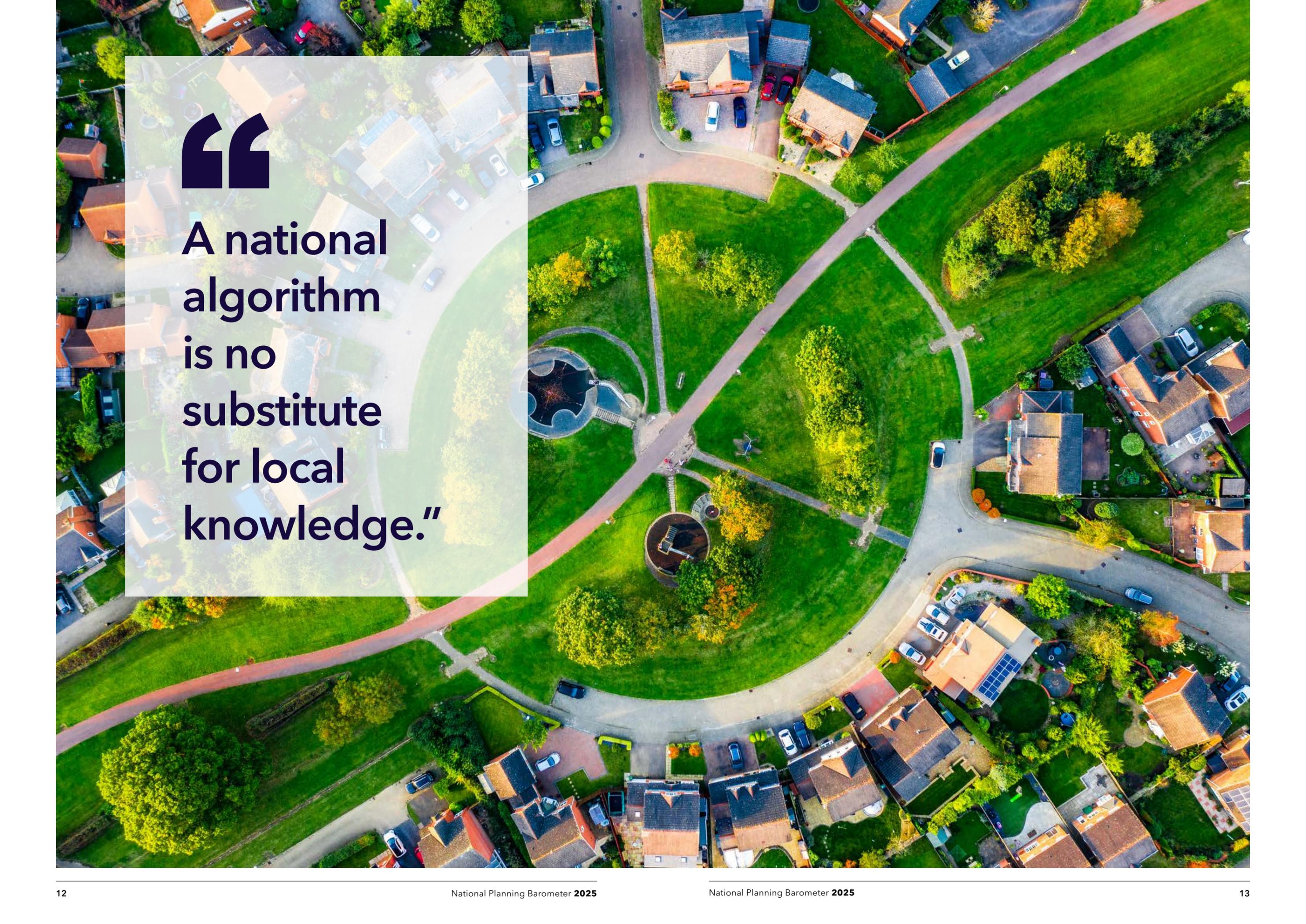
Compounding these developer-based delivery barriers, we see community opposition to schemes on the increase and a decrease in the lack of suitable sites in local areas.

WHAT ARE THE BIGGEST CHALLENGES TO HOUSING DELIVERY IN YOUR LOCAL AUTHORITY AREA?

2024 2025



Source: National Planning Barometer 2025. Q23: In your opinion, what are the biggest challenges to housing delivery in your local authority area?
Base: Total 2025 n=485, Total n=2024 n=418

An aerial photograph of a suburban neighborhood. The scene is dominated by a large, central green park area with a winding path and several circular structures, possibly playgrounds or fountains. The park is surrounded by residential streets with houses, lawns, and parked cars. The overall atmosphere is peaceful and well-maintained.

“

**A national
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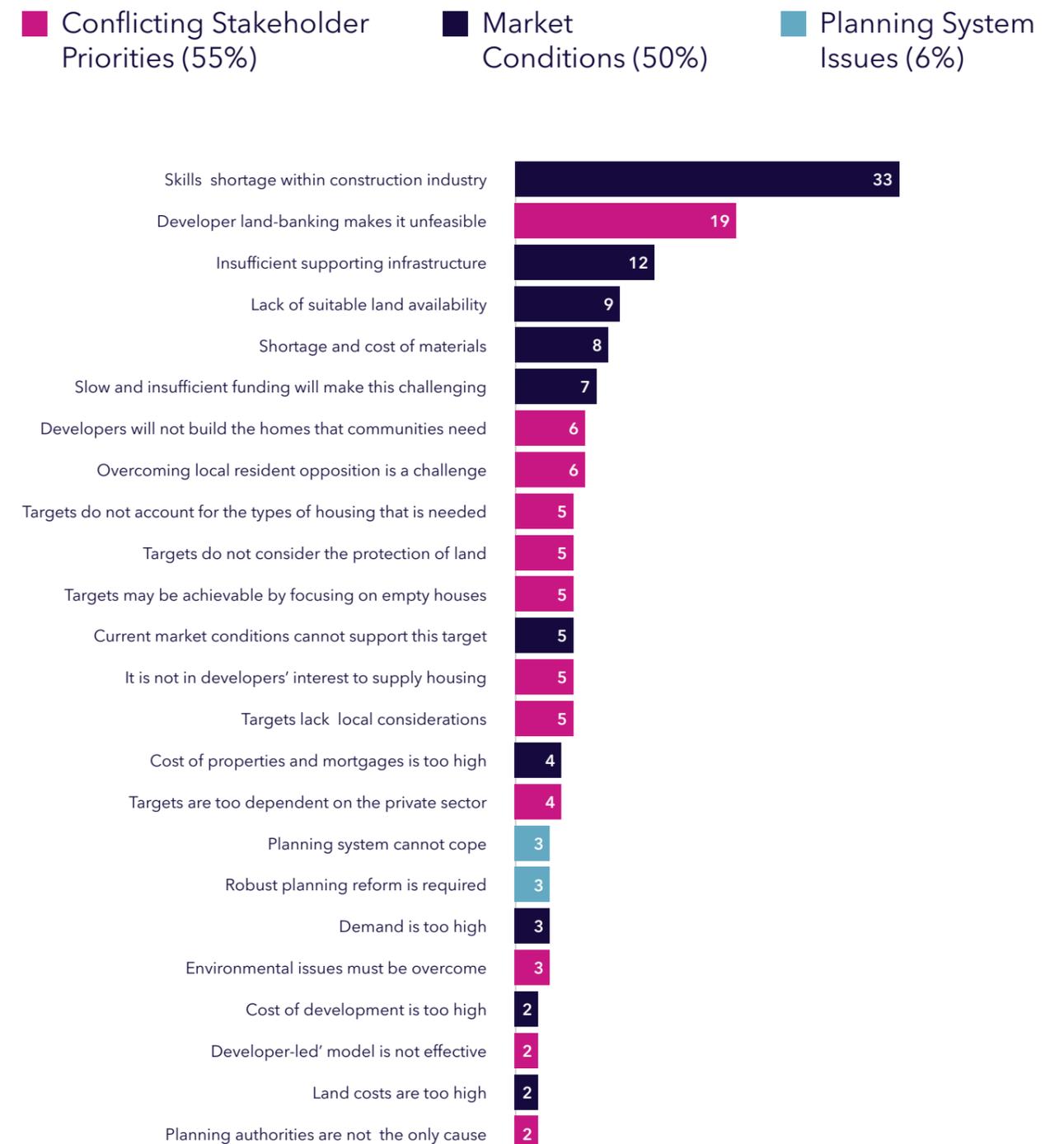
COUNCILLORS ARE HIGHLY SCEPTICAL ABOUT GOVERNMENT PLANS TO INCREASE HOUSING SUPPLY, FEELING THAT THEY OVERLOOK KEY ISSUES IMPACTING FEASIBILITY

Given the extent of delivery challenges councillors are experiencing in their local areas, it is perhaps unsurprising to see that **3 in 4 (76%) say that building 1.5 million homes during this parliament is unachievable** (NB. fieldwork took place before the target was reduced to 1.3 million homes in March 2025).

The study reveals a conflict of priorities between key actors in the planning system hampering target achievability, compounded by negative market conditions. Councillors cite the **skills shortage within the construction industry** as the main reason for their lack of confidence, followed by the negative impacts of **existing developer land-banking**. Following this, councillors also believe that the **lack of sufficient supporting infrastructure** in their local areas will prevent the ambitious plans from becoming a reality.



REASONS WHY THE GOVERNMENT'S PLANS TO BUILD 1.5 MILLION HOMES ARE SEEN AS UNACHIEVABLE (text responses, themed*)



*Note: Respondents were able to make multiple comments on their views, so these themed groupings add up to more than 100%.

Source: National Planning Barometer 2025. Q5. How achievable do you think the government's plan to build 1.5 million homes during this parliament is? %s shown for this question are 5 or lower out of 10 on a 10 point scale. Q6. Please could you explain your views on the government's plans to build 1.5 million homes within the term of this parliament? Base: Total 2025 n=485



The housing crisis has not been caused by the Planning System, it is caused by **developers refusing to build out** the 1.1 million permissions. In our area, all housing is put onto the open market at **prices local people cannot afford** - so housing brings in more people, overloading our creaking infrastructure, and **not addressing OUR housing need.**"



The **economic environment is not favourable** to housebuilders at the moment with high interest rates and high labour and material costs **limiting the viability** of many schemes. This situation is likely to persist for some time with inflation moving higher."

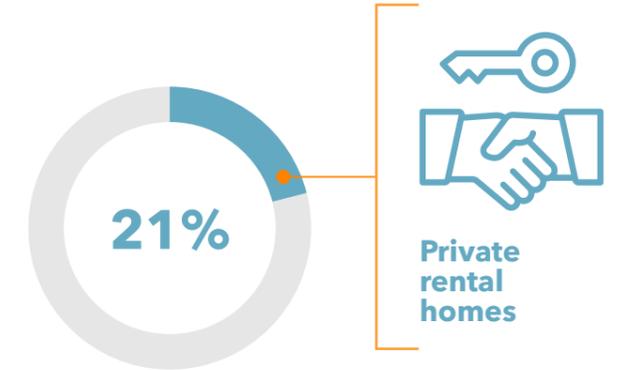
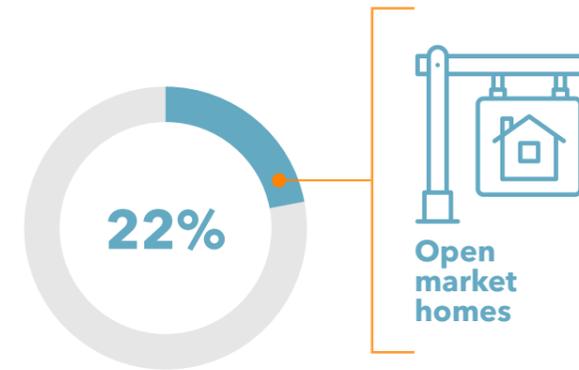
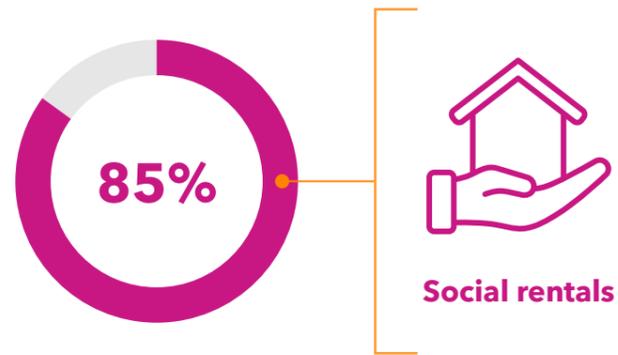


It expects the private sector to deliver affordable homes which is not **what developers were created to do** and so, of course they will try to wriggle out of this responsibility. **Residents will reject homes imposed** on them, especially if they do not respect the local character of an area."

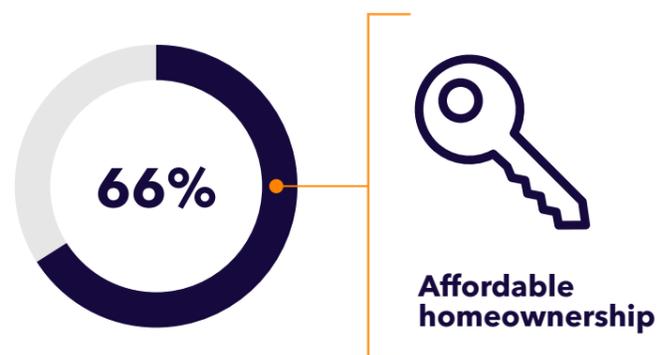


GOVERNMENT PLANS PLACE AFFORDABLE HOUSING PROVISION UNDER THREAT

TYPES OF TENURE NEEDED IN LOCAL AREAS (%)



AFFORDABLE HOUSING: 83% (NET)



The revised National Planning Policy Framework (NPPF) has made two key changes related to affordable housing:

- > Social Rent is now defined separately
- > National requirements for schemes to deliver at least 10% of the total number of homes on major sites as affordable home ownership are removed

Continuing the trend since the inception of the National Planning Barometer in 2018, Councillors view social rental and affordable housing (rental and ownership) as the top tenures needed in their local areas. And the study reveals that **councillors question the efficacy of assessing social rental as a separate category**, with 48% feeling it will be effective in increasing supply of these homes vs. 52% feeling it will be ineffective.



Source: National Planning Barometer 2025. Q4a. Which housing tenures does your Authority need more of?

IMPACT OF AFFORDABLE HOUSING POLICY CHANGES

(Removal of national requirements relating to affordable home ownership)

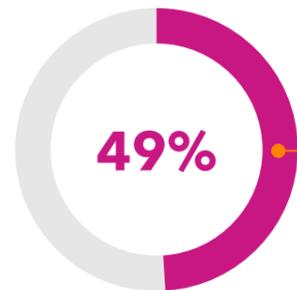
Councillors also interpret the government's removal of national requirements relating to affordable home ownership as having a negative impact on affordable housing supply, with only 1 in 5 (20%) saying this change will increase flexibility for local authorities; a markedly low rating for a change intended to increase flexibility.

A majority of councillors, 6 in 10 (59%) perceive a net negative impact on supply of affordable housing. Councillors are also concerned about impacts on local residents: over 2 in 5 (44%) are concerned that the policy change will benefit developers more than the communities it is designed to serve - and 1 in 3 are concerned that it will negatively impact low-income families.

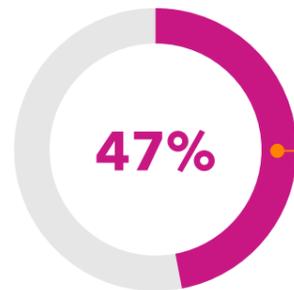


6 in 10 (net)

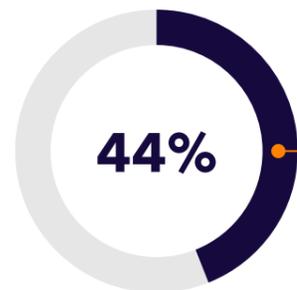
Say it will have a negative impact on affordable housing supply



Say it will lead to a decrease in affordable housing supply



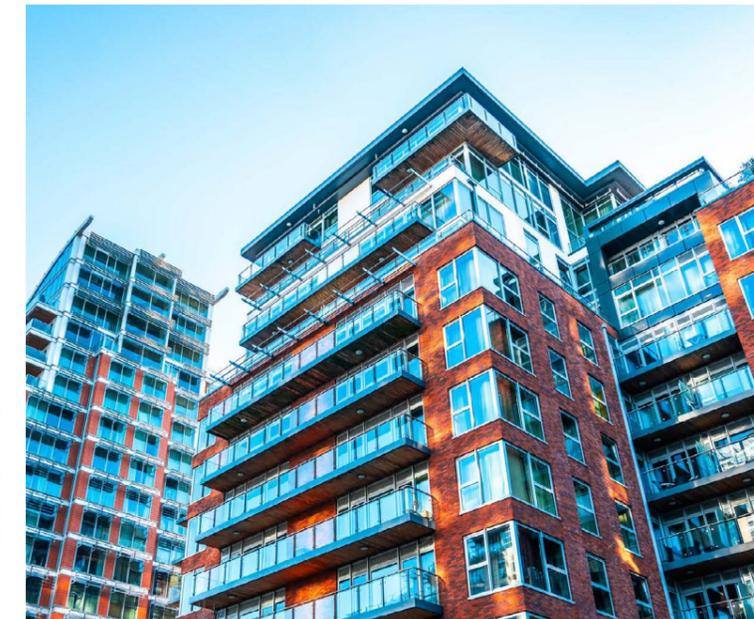
Say it will reduce the guaranteed provision of affordable homes



Say it will benefit developers more than communities



Say it will negatively impact low income families



Source: National Planning Barometer 2025. Q8. How do you interpret this change in policy? Base: Total 2025 n=485

COUNCILLORS PERCEIVE A THREAT TO LOCAL DEMOCRACY FROM NATIONAL POLICY WHICH LACKS REGARD FOR LOCAL HOUSING NEEDS

Over 6 in 10 (63%) councillors oppose the return to mandatory housing targets. In their verbatim feedback on this policy change, they are highly critical, feeling it applies a 'one size fits all' policy, putting pressure on councils to deliver housing without considering local tenure requirements. However, it is notable that only half (49%) of councillors know what their housing target is, and amongst those who are aware of their housing target, 3 in 4 (74%) say their target is not achievable.

Related to this, the revised standard method for calculating housing need (using a formula that incorporates a baseline of local housing stock, adjusted upwards to reflect local affordability pressures) sees strong opposition with **73% disagreeing that existing housing stock should be used to calculate housing need.**

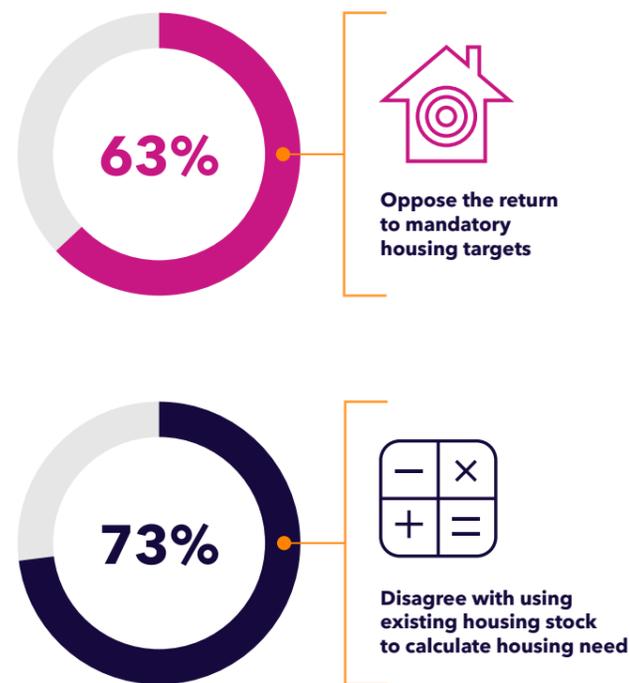
Further national policy which affects local decision-making powers is the proposed National Scheme of Delegation, where applications that are compliant with local plans would be automatically delegated to planning officers. The study shows that **councillors widely reject the plans with only 31% saying they think compliant applications should be delegated, and only 25% saying it would improve the performance of their planning committee.**

Councillor views on recategorising some Green Belt land as 'Grey Belt' land underscore their resistance to more 'top down' national planning decisions, with 7 in 10 (69%) favouring a local or case by case approach to Grey Belt mapping, with only 1 in 5 (17%) favouring a fixed, nationally mapped approach, akin to the current Green Belt mapping. Councillors challenge the effectiveness of the Grey Belt, with only 34% feeling Grey Belt plans would preserve the integrity of the Green Belt and less than half (46%) feeling it will provide enough land for houses.



Local authorities have a better idea of need and its capacity to fulfil that need. Happy to have an advisory target and even happy to have an advisory target with carrots. **A national algorithm is no substitute for local knowledge.**

MANDATORY HOUSING TARGETS



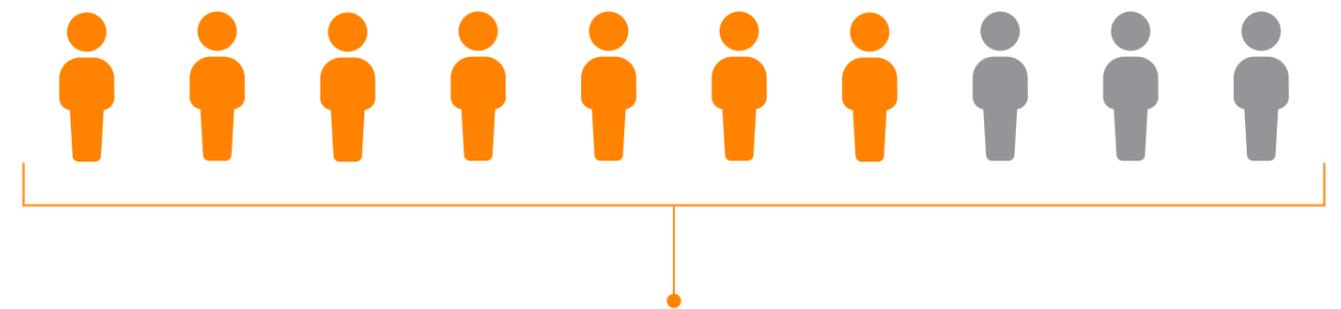
NATIONAL SCHEME OF DELEGATION



Only 1 in 3

Say applications that are compliant with the local plans should be delegated to planning officers

GREY BELT



7 in 10

Favour a locally focused approach to grey belt mapping

Source: National Planning Barometer 2025. Q11a: How much do you support or oppose the return to mandatory housing targets? %s shown for this question are 5 or lower out of 10 on a 10 point scale. Q13a: Do you know what the target for your local authority is? Q12: How much do you agree or disagree with using existing housing stock as the baseline for calculating housing need? %s shown for this question are 5 or lower out of 10 on a 10 point scale. Q9b: Would you prefer grey belt sites to be Base: Total 2025 n=485

CONCLUSION

The National Planning Barometer 2025 reveals a significant disconnect between national policy ambitions and the realities faced by those on the front lines of planning and delivery. While the government has set an ambitious target of delivering 1.5 million homes by the end of the current parliament, councillors are telling us that these goals are not translating into delivery at local level.

Councillors are clear that simply setting targets is insufficient and that addressing the root causes of delivery challenges is essential for meaningful progress. They identify persistent barriers, including the perception of slow build-out rates alongside funding shortages, skills gaps, and infrastructure deficits. Skills shortages in construction and planning, as well as insufficient supporting infrastructure, are seen as further undermining the achievability of government targets.

The findings suggest that greater local input and tailored approaches are crucial for effective planning reform, especially if the government's housing ambitions are to be realised.

Councillors overwhelmingly reject top-down national policies that are seen as diminishing local authority control, such as nationally set housing targets and a national scheme of delegation. However, the reality of the housing crisis, which 92% of councillors say remains or has worsened, and the political weight behind the 1.5m home objective, means that the "top-down" targets are here to stay.

Ultimately, the ongoing housing crisis, coupled with mounting delivery challenges and policy scepticism, highlights the need for a more collaborative, locally informed, and pragmatic approach to planning and housing delivery. Councillors highlight that effective solutions will require genuine partnership between national government, local authorities, developers, and communities.

Only through open communication, targeted funding, and empowering local decision-makers can the sector hope to overcome entrenched barriers and deliver the affordable, high-quality homes the country urgently needs.

The findings of this year's National Planning Barometer make it clear that if we are to rebuild trust with local communities and decision-makers, developers must take a proactive, transparent, and collaborative approach to communication.

This means forging genuine, ongoing partnerships with local authorities and communities. Developers need to be open in sharing both the challenges and the benefits of development, demonstrating their commitment to skills and training, social value and sustainability. By reflecting the needs and concerns of communities, the industry can reshape its reputation and play a leading role in solving the housing crisis.

Now is the moment for the industry to step up, lead with transparency, and show how they are part of the solution not just in words, but in action.



At SEC Newgate we develop, and implement, strategies that enable you to connect meaningfully with the right local audiences.

Whether you are seeking to consult on a new development project, raise your profile with local stakeholders, or simply gain better understanding of community aspirations, we tailor a bespoke approach.

Delivering the right messaging to the right audience at the right time is crucial. We can help you to achieve your immediate goals while also building meaningful relationships with local communities and developing a long-term reputation for competence.

**BEST CONTINENTAL
EUROPE AGENCY
OF THE YEAR**

PROVOKE SABRE
EMEA AWARDS 2025

**PROPERTY
ADVISOR OF
THE YEAR**

PROPS AWARDS 2025

**BEST PLACES
TO WORK
2023/2024**


THE SUNDAY TIMES

**COMMUNICATIONS
AGENCY OF
THE YEAR**

EDIE NET-ZERO
AWARDS 2023

**GLOBAL AGENCY
OF THE YEAR**

CORPORATE/PUBLIC AFFAIRS

PROVOKE MEDIA GLOBAL
SABRE AWARDS 2023

**COMMUNICATIONS
AGENCY OF
THE YEAR**

UK GREEN BUSINESS
AWARDS 2025

SHORTLISTED

**PR &
COMMUNICATIONS
AGENCY OF THE YEAR**

HEDGEWEEK EUROPEAN
AWARDS 2025

SHORTLISTED

**BEST AGENCY
CORPORATE AND CITY**

PRWEEK CORPORATE
AFFAIRS AWARDS 2025

SHORTLISTED

**BEST CAMPAIGN
REAL ESTATE &
CONSTRUCTION**

PROVOKE SABRE EMEA
AWARDS 2024

SHORTLISTED

**CONSULTANCY
CAMPAIGN OF
THE YEAR**

PRCA PUBLIC AFFAIRS
AWARDS 2024

SHORTLISTED

Contact us

If you have any questions about The National Planning Barometer 2025 or how it might impact your business, please contact:

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