

NATIONAL
PLANNING
BAROMETER
2026



ARE LABOUR'S PLANNING REFORMS ACTUALLY WORKING?



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FOREWORD

The National Planning Barometer 2026 suggests a more nuanced picture of England's housing system than many headline debates imply. Almost two years into Labour's programme of planning reform, councillors who sit on planning committees across England now report early signs that the changes may be beginning to have an effect. Yet significant barriers remain that could challenge delivery of the Government's 1.5 million homes ambition.

Now in its sixth year, the National Planning Barometer remains the only nationally representative survey of councillors involved in planning decision-making across England. Based on responses from more than 530 members, this year's findings suggest the mood around housing is improving faster than wider market conditions.

Around a third of councillors (35%) say they have seen an increase in the number of homes being consented in their local authority area since Labour's reforms were introduced. While this does not yet amount to transformation, it indicates that the changes may be starting to influence the operation of the planning system at a local level.

Regional variation suggests reforms are not being felt evenly across England. Councillors in the West Midlands are significantly more likely (54%) to report an increase in housing consents, while members in London are far more likely to say the reforms have had no impact (75%). This indicates that national planning changes may interact very differently with local market conditions, land availability and development viability.

This shift is also reflected in attitudes to the housing crisis. For the first time since the Barometer began, fewer councillors say the crisis is worsening nationally, while perceptions of local housing pressure have also softened. That does not mean underlying need has been resolved. Demand for social rented and affordable housing remains intense, with overwhelming majorities of councillors continuing to identify significant shortages.

Councillors therefore appear to hold two views at once. Too few homes are still being built, but the planning system itself may be improving. Many continue to identify the principal barriers to housing delivery as wider constraints beyond planning reform alone, including build-out rates, viability pressures, infrastructure capacity and funding shortages.

This raises an important question about how planning reform should be judged. By tying structural reform of the planning system so closely to a five-year target of 1.5 million homes, the government may have made the success of those reforms harder to recognise. Councillors suggest planning can become faster, more confident and more effective, even where economic conditions continue to suppress delivery.

Views on specific reforms reinforce this pragmatic outlook. Measures that strengthen local planning capacity, particularly increased resourcing for planning authorities, receive the strongest backing. By contrast, measures such as the National Scheme of Delegation, which would reduce the role of planning committees in some decisions, attract lower levels of confidence from councillors.

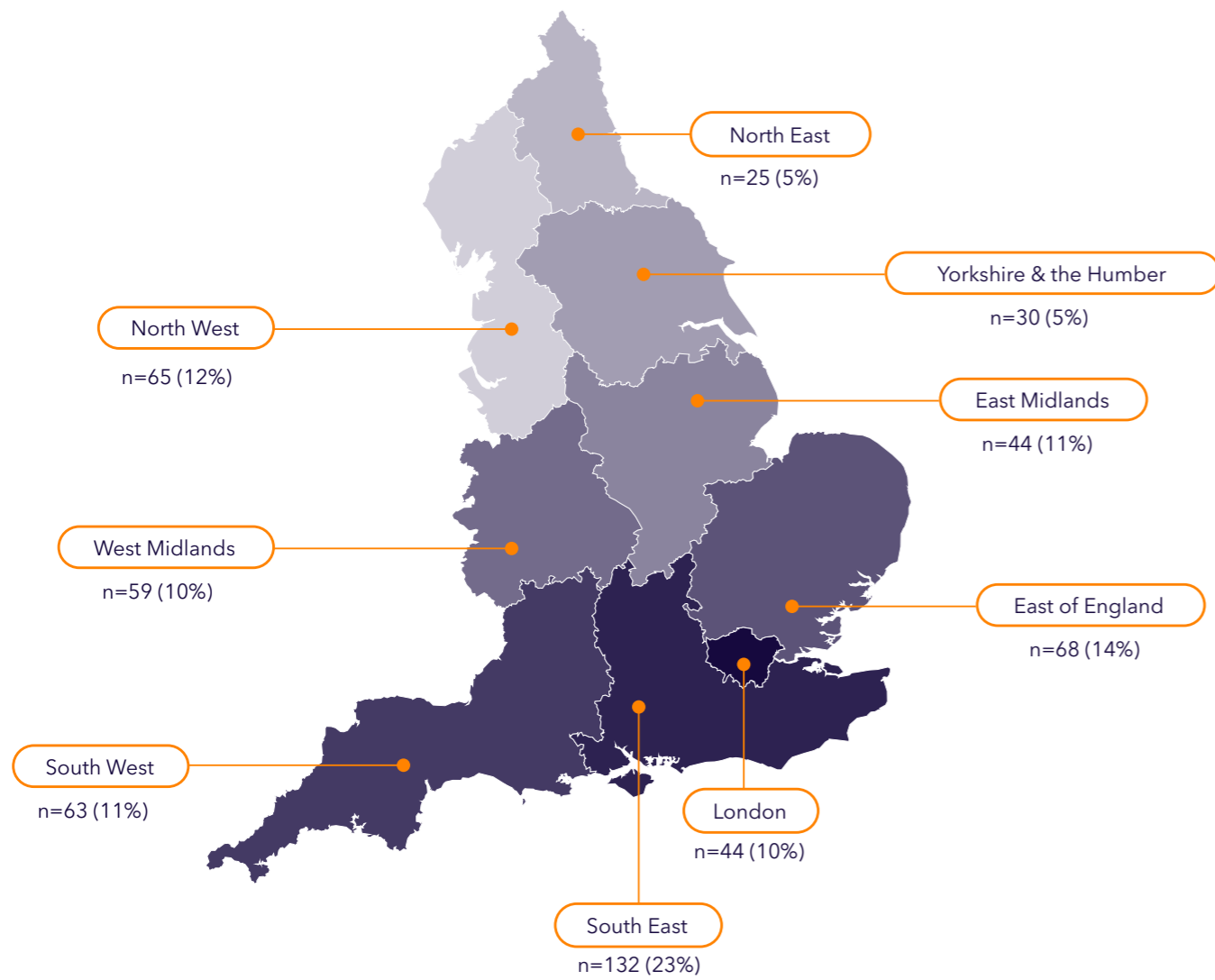
For the development sector, the message is clear. The debate is moving beyond whether permission can be secured, towards whether schemes can be delivered quickly, credibly and with benefits communities can see. Demonstrating deliverability is becoming as important as making the planning case itself.



METHODOLOGY

An online survey with 532 planning committee councillors.

Fieldwork took place between 19 January and 11 February 2026, and data was weighted to be proportionate to the number of councillors in England by region.

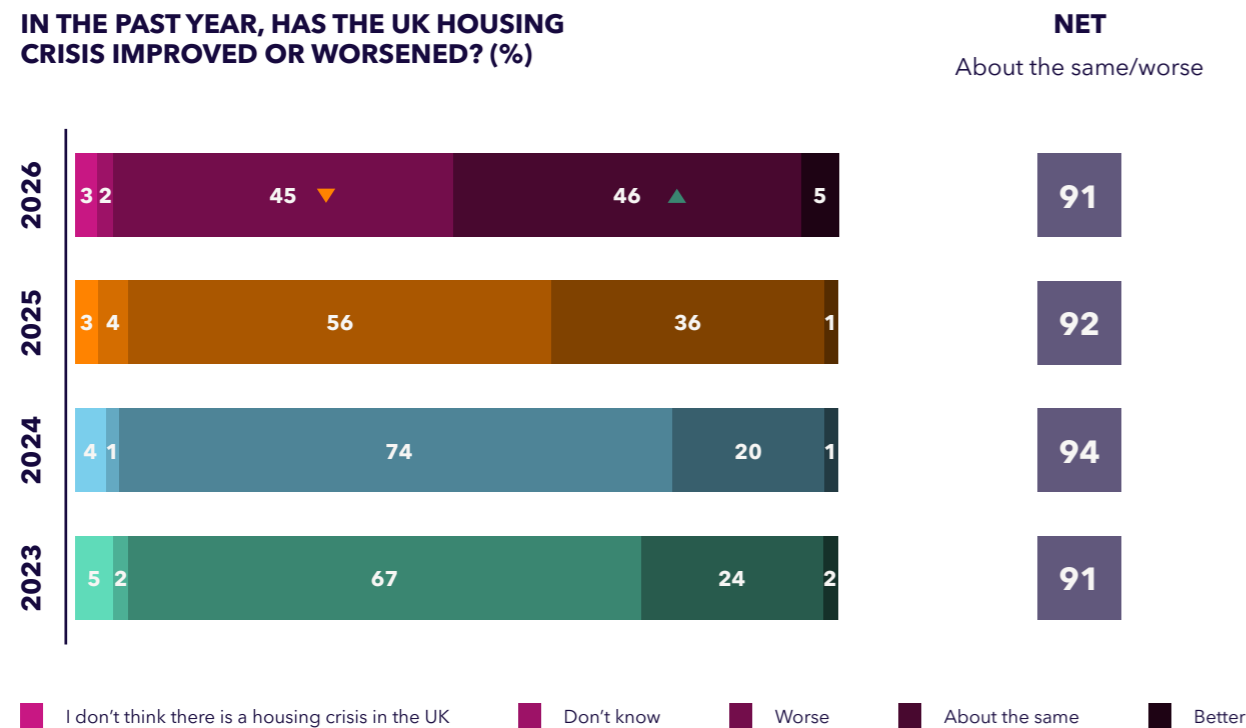


While the housing crisis persists, there are signs of gradual easing

For the first time since the inception of the National Planning Barometer, councillors report a softening in how severe the housing crisis feels, both nationally and locally.

Showing a significant decrease, 45% of councillors say the housing crisis is worse at a national level, down from 56% last year. Whilst the crisis has not gone away, fewer councillors describe it as worsening and more believe conditions have stabilised over the past year. Councillors increasingly describe the situation as one of ongoing pressure, rather than acute worsening. The sense of emergency that has characterised previous years has eased slightly.

IN THE PAST YEAR, HAS THE UK HOUSING CRISIS IMPROVED OR WORSENE? (%)



Source: National Planning Barometer. Q1. Over the last 12 months, do you think the UK housing crisis has got better or worse? Base 2023: n=311, 2024: n=416, 2025: n=485, 2026 n=532

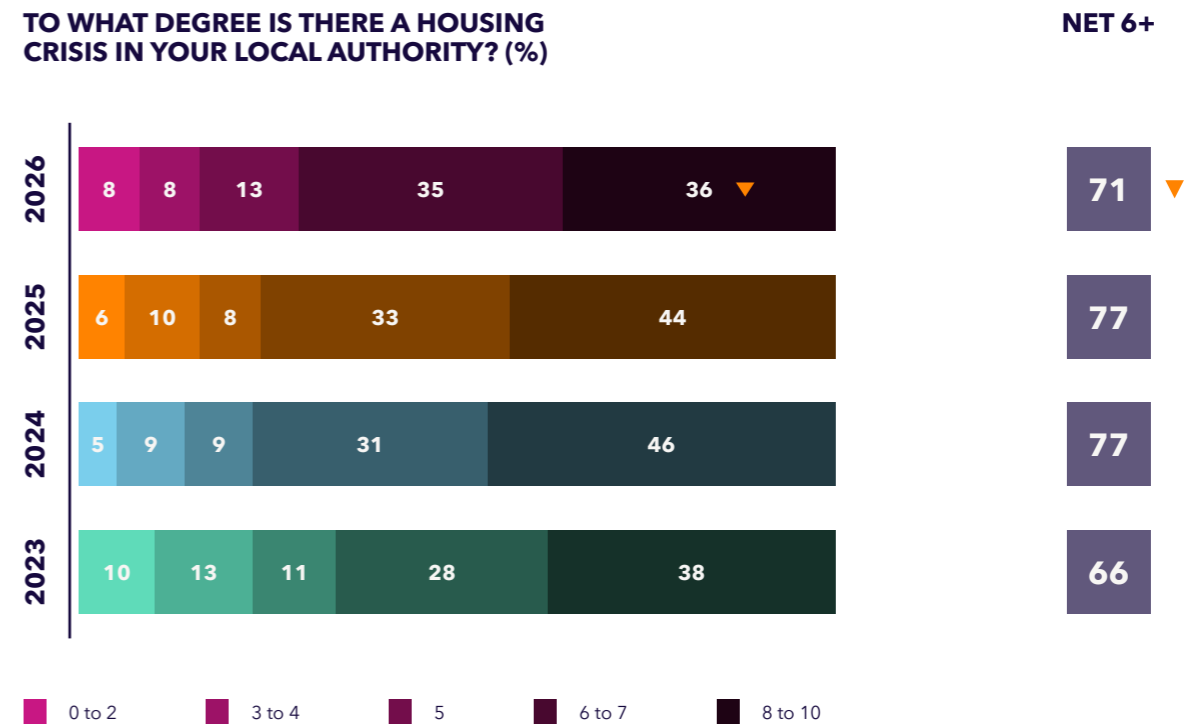
▲ ▼ Denotes significantly higher / lower vs previous year



At the local level, 71% say the housing crisis is severe (NET 6+ out of 10), compared to 77% last year. However, whilst the research does indicate a lessening in severity, this cannot necessarily be

interpreted as the housing crisis being resolved. Rather, the data indicates a shift in perception amongst councillors and indicates that the situation has levelled out.

TO WHAT DEGREE IS THERE A HOUSING CRISIS IN YOUR LOCAL AUTHORITY? (%)



Source National Planning Barometer. Q2: To what degree would you say there is a housing crisis in your authority area?

Base 2023: n=311, 2024: n=416, 2025: n=485, 2026 n=532, London councillors n=44, East Midlands councillors n=44, East England councillors n=68

▲ ▼ Denotes significantly higher / lower vs previous year

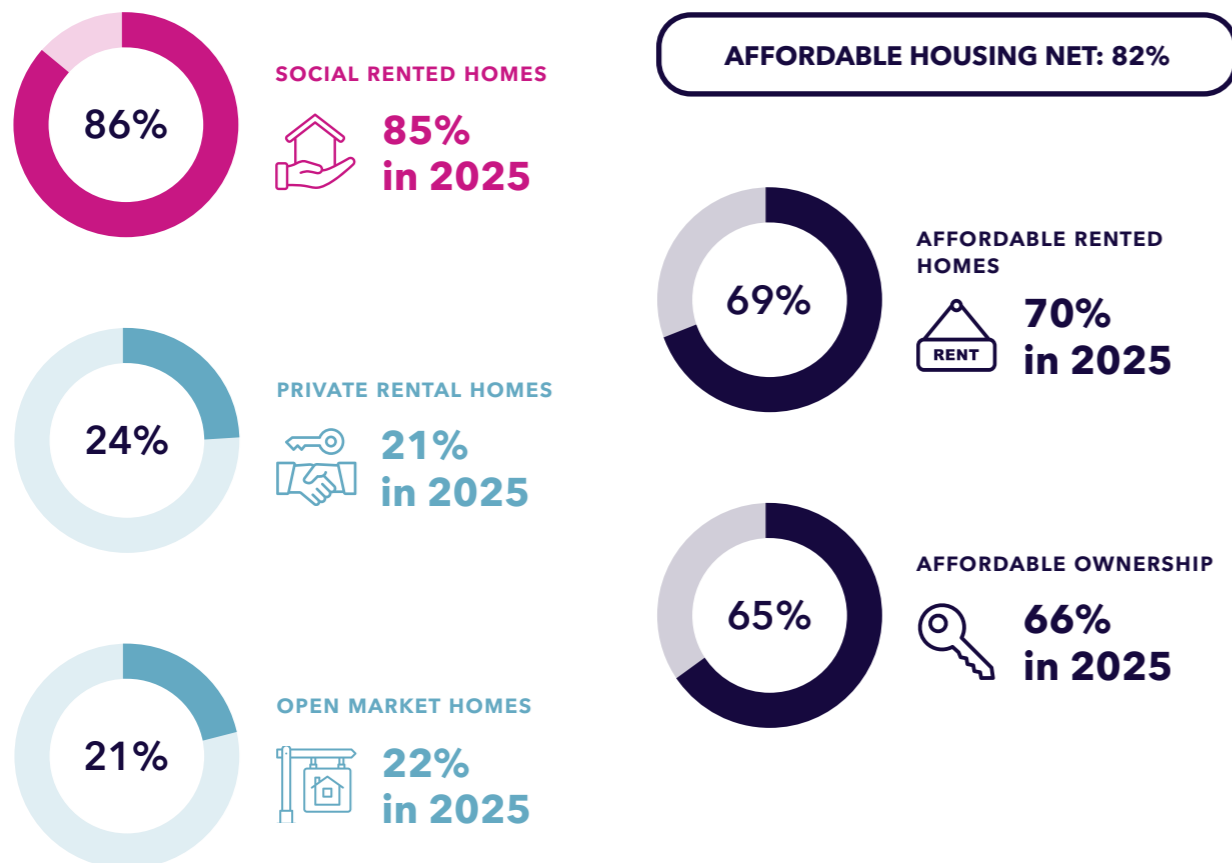
Whilst the housing crisis severity has eased, the scale of housing need has not

Despite this moderation in perceived severity, the underlying need for housing remains largely unchanged.

Affordable and social housing continues to dominate councillors' priorities across England, with overwhelming majorities stating their local authorities still need more social rented homes (86%) and affordable housing (82%).

This disconnect between easing pressure and persistent need reinforces a key finding of this year's study. The housing crisis may feel less intense to planning committee councillors, but the fundamentals driving it remain firmly in place.

WHICH TYPES OF HOUSING TENURE ARE MOST NEEDED IN YOUR LOCAL AUTHORITY AREA? (%)



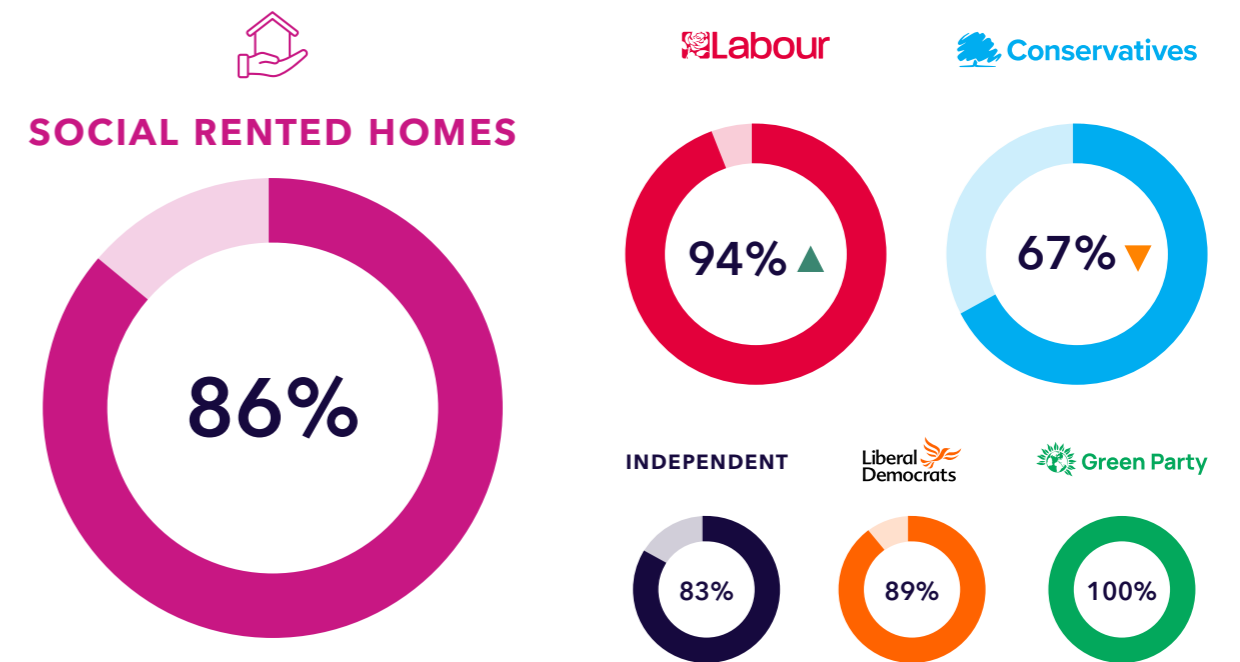
Source: National Planning Barometer. Q3. Which housing TENURES does your Authority need more of? Base: 2025 n=485, 2026 n=532

Political affiliation influences housing priorities locally.

Labour councillors are significantly more likely to say their local authority needs more social rented homes (94%). Conservative councillors, by contrast, are significantly less likely to identify social rent as a priority (67%).

These differences matter, as they could feed through into planning decision making, affecting which developments gain backing and how housing need is interpreted at a local level.

WHICH TYPES OF HOUSING TENURE ARE MOST NEEDED IN YOUR LOCAL AUTHORITY AREA? (%)



In some instances, results for smaller political groups, including Reform UK, have not been reported separately due to sample sizes being too small to ensure robust analysis.



Source National Planning Barometer. Q3. Which housing TENURES does your Authority need more of? Base 2026: n=532, Labour councillors: n=163, Conservative councillors: n=108, Liberal Democrat councillors n=138, Green Party councillors n=39, Independent councillors n=52

▲ ▼ Denotes significantly higher / lower vs total.

London is the locus of the housing crisis

London remains an outlier.

Amongst this national picture, London stands apart. Councillors in the capital are significantly more likely to describe the housing crisis as severe (NET 8+ out of 10), with 66% saying so.

London councillors consistently describe a system under strain, pointing to high costs, limited funding for social housing, and an insufficient supply of genuinely affordable homes.

This divergence highlights the increasingly uneven geography of the housing crisis, with London continuing to face challenges at a scale and intensity not seen elsewhere.

London has a distinct set of challenges, and needs, that shape the state of the housing crisis in the capital.

Not only do London councillors cite density, height and massing requirements as a unique barrier in the capital to housing application consent, they are also more likely to note a lack of suitable sites as a delivery constraint. Nearly half (48%) of London councillors note it.

Housing need in the capital is also distinct. Demand for family homes (77%) and temporary or emergency accommodation (59%) exceeds the national average, reflecting deep rooted affordability pressures.

The findings point to a housing system in London that remains underinvested and overwhelmed. Whilst national planning reform may create marginal gains elsewhere, councillors in the capital see little evidence that it addresses the core challenges they face.



“

The **housing crisis is a supply crisis**, and in London there has been a substantial slow-down in the development of new conventional homes. Whilst government is talking a great deal about investing in new homes, it's **not tackling some of the fundamental issues in London** (BSR, financial capacity of housing providers, slow-down in private sales in London).”

“

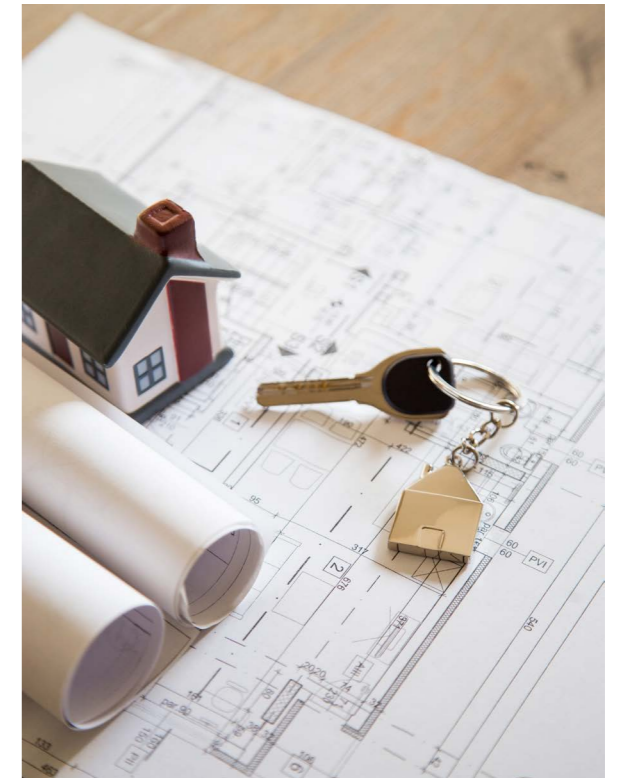
Developers are finding it harder to build due to cost pressures, and London market prices are now significantly **out of reach for most Londoners**. There is also a shortage of funds for social housing, which is where need is greatest.”

“

I would define the housing crisis first and foremost as **being about affordability**. Lack of delivery of **genuinely affordable homes remains an enormous challenge**.”

Molior London's Residential Development report demonstrates that **London construction starts* have fallen 84% in a decade** - from 33,782 in 2015 to 5,547 in 2025. Whilst Q4 2025 saw a marked improvement with 2,294 starts - this is far behind the government's target of 22,000 starts each quarter.

Published homelessness data underscores the scale of the problem, with **London accounting for a disproportionate share of people living without secure housing (1 in 45)**.



Source National Planning Barometer. Q2: To what degree would you say there is a housing crisis in your authority area? Base: 2026 n=532

London councillors n=44 Shelter analysis of MHCLG statutory homelessness statistics and ONS population estimates; https://england.shelter.org.uk/what_we_do/updates_insights_and_impact/interactive_homelessness_map / Molior London Residential Development Report, January 2026. *Construction start means significant piling has commenced. Technical implementation isn't enough. molior-residential-development-in-london-january-2026.pdf

Councillor responses to the government's reforms show cautious optimism

There is a perception that the government's planning reforms are starting to positively impact consents.

Almost two years into Labour's programme of planning reform, some councillors believe they are beginning to see an impact. Around 1 in 3 (35%) report an increase in the number of homes consented in their area.

However, whilst this perception exists amongst some councillors, it does not necessarily reflect the reality. Government data suggests that in 2025 Q3, the number of housing units that were granted planning permission decreased by 15% from the year before - from 245,000 to 208,000.

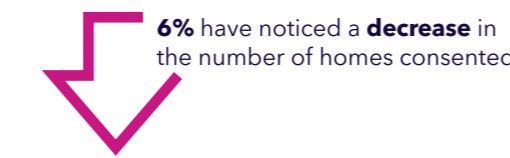
However, this research demonstrates an important perception shift, indicating that change is happening at an attitudinal level amongst councillors.

There is strong regional variation in reform impact.

The clearest evidence of uplift is in the West Midlands where councillors are significantly more likely to report an increase in housing consents (54% vs 35% at a total level).

However, the strongest variation reflects the ongoing crisis in London, where 75% of councillors report no impact at all.

WHAT HAS BEEN THE IMPACT OF THE PLANNING REFORMS ON HOUSING CONSENT? (%)



Source National Planning Barometer. Q10: To deliver on its commitment to build 1.5 million homes in this parliament, the government announced a series of planning reforms, including the reintroduction of housing targets and a national scheme of delegation. In your view, what has been the impact of these reforms since they were announced, if any? Base: 2026 n=532, West Midlands councillors n=59, London n=44

Source for government data: Glenigan planning permission data: snapshot as at 8 December 2025. Table 3. Planning applications in England: July to September 2025 - statistical release - GOV.UK

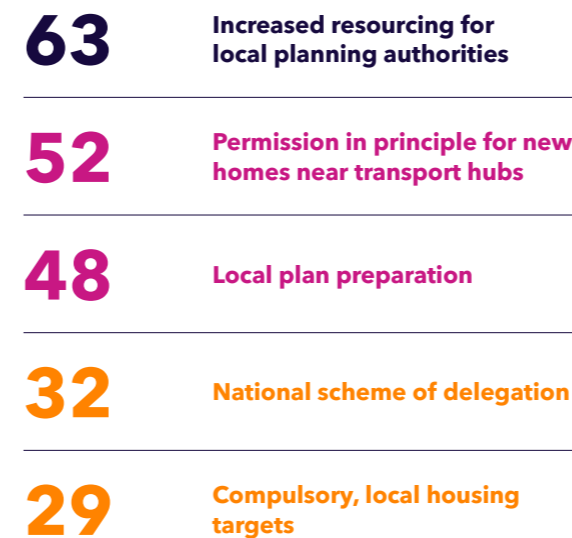
In terms of housing delivery, councillors are more supportive of reforms that build local capability.

Reforms that strengthen local planning capability receive the strongest backing, with 63% of councillors saying that 'Increased resourcing for local planning authorities' will have a positive impact on housing delivery. This measure is viewed as enabling the system to function better.

In contrast, reforms that override local decision making attract less support. Under 1 in 3 councillors say that the national scheme of delegation and compulsory housing targets will have a positive impact on housing delivery. This tension between national ambition and local control has been an ongoing theme in this research each year, and remains unresolved. It continues to shape councillors' views and how they respond to the reform agenda.

IMPACT OF SPECIFIC REFORMS ON HOUSING DELIVERY (%)

NET POSITIVE IMPACT (6+ OUT OF 10)



Source: National Planning Barometer. Q12. What impact do you think the following reforms will have on housing delivery? Base: 2026 n=532

Reform optimism is driven by Labour councillors.

Perceptions of reform impact are also shaped by political affiliation. Labour councillors are consistently more positive about the effect of planning reforms, even for those measures that attract lower support overall. Amongst Labour councillors, 48% (vs 32% total) say the national scheme of delegation will have positive impact, and 53% (vs 29% total) say compulsory housing targets will have a positive impact.

This raises an important question for future delivery should councils change leadership at the next election, as reform confidence could shift substantially.

“Centrally mandated housing targets often do not have any appreciation for local factors and no standard methodology will genuinely address the varying requirements of the whole country.”

“A number of these changes would help but they do not address the speed of delivery by developers...The planning system has not been the problem in our world, it is the incentive to deliver these quickly.”

Councillors say the system is stalling at delivery, not consent

The perception of slow build out by developers has increased since last year, and continues to dominate as a challenge to housing delivery.

A core finding this year is that councillors do not see planning committees as the primary block on housing delivery. Instead, the perceived bottleneck sits after consent has been granted.

Slow build out by developers is now the single most commonly cited challenge to housing delivery, with 72% of councillors noting it as a challenge, up from 58% last year.

However, Home Builders Federation research conducted with *SME homebuilders* provides an interesting developer viewpoint. This research indicates that the blocker does not lie with developers alone.

The top 2 barriers to housing delivery include:

- Delays in securing planning permission (94%)
- Lack of resources in Local Authority planning departments (89%)

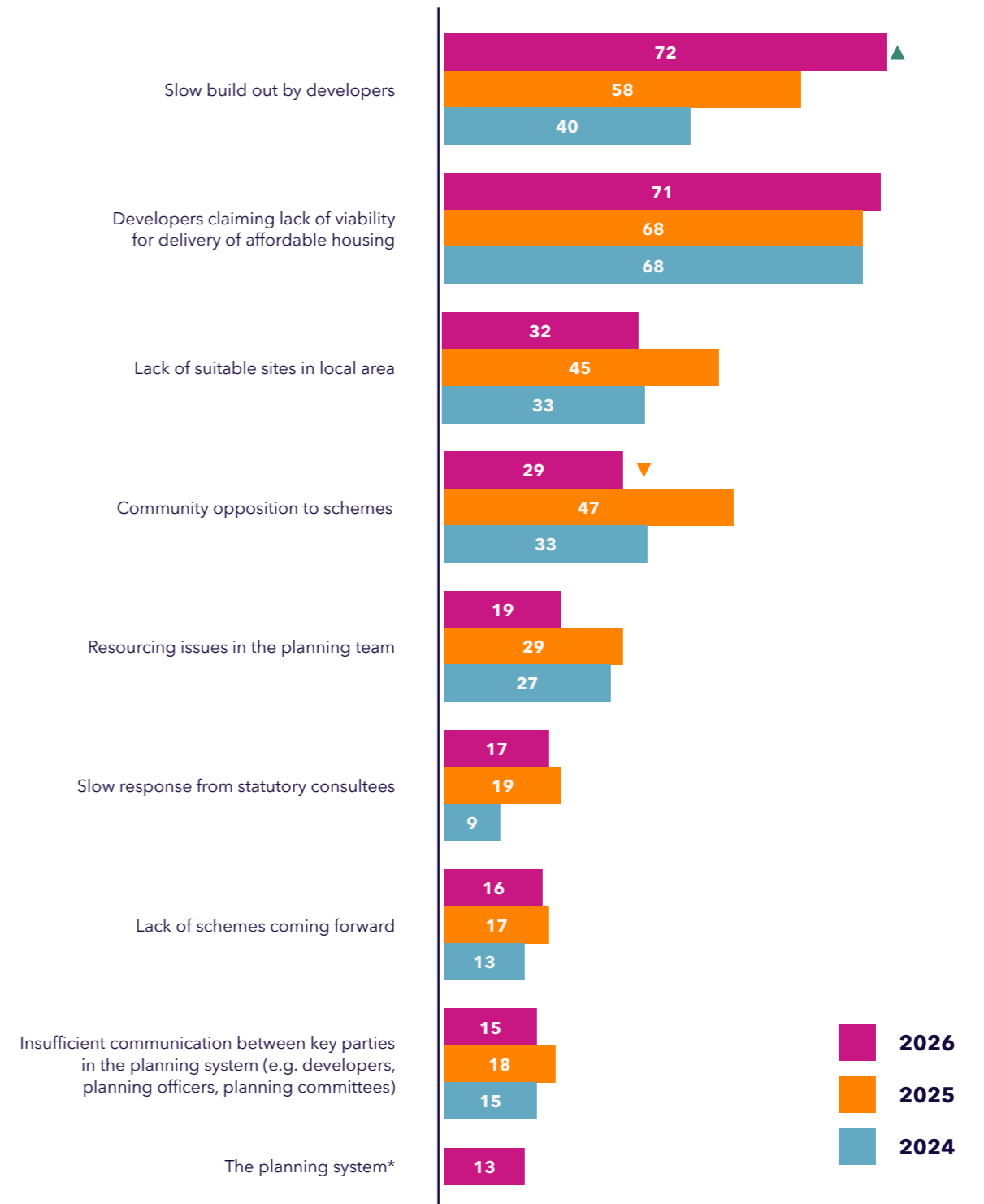
Source: State of Play Report 2025/2026. Home Builders Federation; Close Brothers Property Finance; Travis Perkins, November 2025.

A marked decrease in community opposition.

Community opposition as a challenge impacting housing delivery has decreased from 47% last year to 29% in 2026. These shifts reinforce where responsibility for delivery is now perceived to sit amongst councillors.

As attention moves away from consent and towards delivery, scrutiny is falling more squarely on build out rates and the factors that delay homes coming forward once permission has been secured.

WHAT ARE THE BIGGEST CHALLENGES TO HOUSING DELIVERY (POST CONSENT) IN YOUR LOCAL AUTHORITY AREA? (%)



*New answer code in 2026

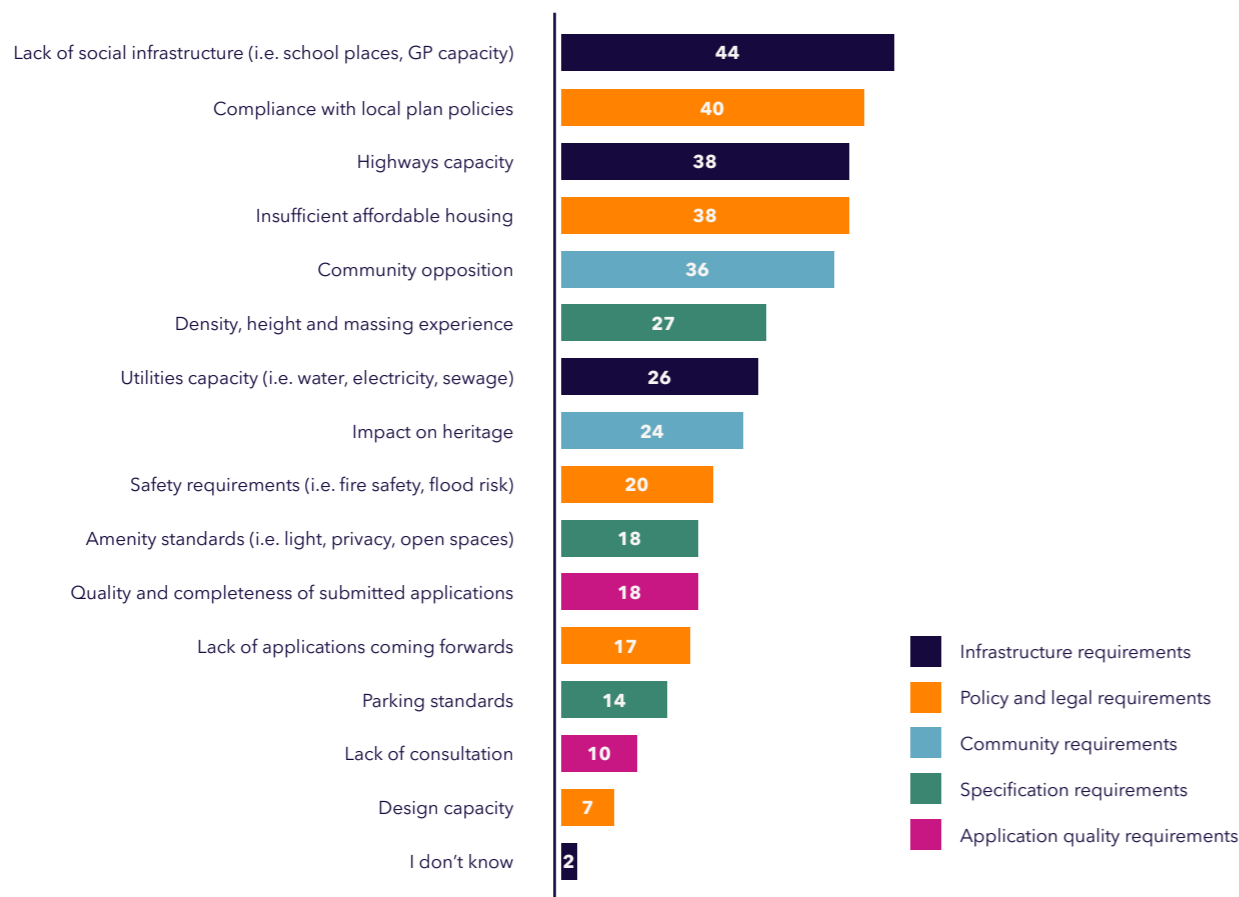
Source National Planning Barometer. Q15. In your opinion, what are the biggest challenges to housing delivery (i.e. post consent) in your local authority area? Base: 2026 n=532

▲ ▼ Denotes significantly higher / lower vs previous year

Planning consent remains heavily shaped by local factors

Although councillors generally view the planning system as functioning effectively, and place greater responsibility for under-delivery on developers at the build-out stage, applications continue to be refused for a wide range of locally driven reasons. Infrastructure capacity, local plan compliance and community response remain key considerations in decision-making, meaning the consent stage continues to present a significant hurdle for many schemes.

THE MAIN REASONS WHY APPLICATIONS FOR NEW HOMES ARE NOT CONSENTED
TOTAL LEVEL



Source National Planning Barometer. Q14. In your experience, what are the main reasons that applications for new homes are not consented in your local authority area? Base: 2026 n=532

Regional analysis demonstrates a complex and nuanced picture of consent across England.

While councillors generally see the greatest barriers to housing delivery arising after planning permission has been granted, the planning stage continues to present significant challenges for applicants.

Applications are still being refused for a wide range of reasons, including infrastructure pressures, local policy considerations and community response.

The findings also reveal considerable regional variation in the factors influencing planning decisions. While national policy sets the overall direction of travel, planning outcomes continue to be shaped heavily by local political, policy and infrastructure considerations. This suggests that a single national reform agenda may struggle to deliver more consistent outcomes across all parts of England.

THE MAIN REASONS WHY APPLICATIONS FOR NEW HOMES ARE NOT CONSENTED
TOP 3 REASONS BY REGION

Region	Reason	Percentage
NORTH EAST	Lack of social infrastructure	60
	Community opposition	44
	Highways capacity	36
EAST ENGLAND	Compliance with Local Plan policies	47
	Lack of social infrastructure	44
	Highways capacity	38
LONDON	Density, height and massing expectations	52
	Insufficient affordable housing	45
	Compliance with Local Plan policies	39
NORTH WEST	Lack of social infrastructure	46
	Highways capacity	38
	Community opposition	37
WEST MIDLANDS	Highways capacity	56
	Lack of social infrastructure	54
	Community opposition	41
SOUTH WEST	Highways capacity	43
	Lack of social infrastructure	43
	Insufficient affordable housing	41
YORKSHIRE AND HUMBER	Insufficient affordable housing	43
	Lack of social infrastructure	40
	Community highways capacity	40
EAST MIDLANDS	Insufficient affordable housing	48
	Community opposition	48
	Highways capacity	43
SOUTH EAST	Insufficient affordable housing	46
	Compliance with Local Plan policies	46
	Lack of social infrastructure	44

Source National Planning Barometer. Q14. In your experience, what are the main reasons that applications for new homes are not consented in your local authority area? Base: 2026 n=532, North East n=25, North West n=65, Yorkshire and Humber n=30, East England n=68, East Midlands n=44, West Midlands n=59, South West n=63, London n=44

Councillors largely reject the idea that environmental rules are to blame for slow housing delivery

This year, SEC Newgate also wanted to understand how councillors consider and respond to environmental legislation, and its impact on housing delivery.

A majority disagree that environmental requirements are the cause of slow delivery, with 6 in 10 (60%) of councillors disagreeing. Although perceptions vary by political affiliation, Green Party councillors are most supportive of environmental regulation, with 98% disagreeing that it holds back housing delivery. Whereas Conservative councillors are more sceptical, with only 33% agreeing that environmental legislation does not hold back housing delivery.

Consideration of environmental rules are also a standard feature of the planning system. Over 9 in 10 of councillors are considering environmental requirements in application decision making including biodiversity net gain requirements, tree planting and urban greening policies, sustainable transport and carbon reduction. To a lesser extent, councillors are considering nutrient neutrality rules, with just over 6 in 10 considering it, though this is not always applicable for all applications.

Overall, councillors tend to view environmental requirements as a routine part of planning consideration rather than a key barrier to delivery.

6 in 10 (60%) planning committee councillors **disagree** that environmental legislation is holding back housing delivery.

Source National Planning Barometer. Q16. To what degree have the following environmental requirements been a consideration in your decision making? Q17. How much do you agree or disagree that environmental legislation is holding back delivery? Base: 2026 n=532



CONCLUSION

The National Planning Barometer 2026 suggests the success of Labour's planning reforms may be judged too narrowly. Public debate has largely treated the Government's 1.5 million homes ambition as the principal test of planning reform success. Yet councillors involved in planning decisions across England indicate that planning reform and housing output are not the same measure.

This year's findings do not describe a housing crisis resolved. Demand for social rented and affordable housing remains severe, and significant barriers continue to constrain supply. Nor do they suggest a system transformed overnight. However, they do indicate that councillors are seeing early signs of improvement in how the planning system functions: greater confidence, some uplift in consents, and a less negative mood than in previous years.

At the same time, councillors continue to identify wider constraints that planning reform alone cannot fully control: viability pressures, infrastructure provision, build-out rates, labour shortages, funding challenges and market demand.

The findings also underline that planning reform is being felt unevenly across the country. Where markets are stronger and supply conditions more favourable, councillors appear more likely to see progress. In more constrained markets, particularly London, structural barriers remain more entrenched.

In that sense, Labour may have set itself a more difficult political test by linking long-term structural reform of the planning system to an immediate housing delivery target shaped by broader economic conditions.

The success of planning reform cannot be measured by one housing target alone.

For Government, the next phase of reform may need to focus not only on improving planning performance, but on the wider conditions that turn permissions into completed homes. For developers, promoters and landowners, the findings underline that councillors are increasingly focused on credibility of delivery as much as the principle of development itself.

The mood around housing may be improving faster than the market reality. The next challenge is to convert early planning momentum into homes on the ground.



**BEST PLACES
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THE SUNDAY TIMES

**GLOBAL AGENCY
OF THE YEAR**

PROVOKE MEDIA
GLOBAL SABRE
AWARDS 2023 & 2025

**CONSULTANCY
CAMPAIGN
OF THE YEAR**

PRCA PUBLIC AFFAIRS
AWARDS 2026

**CONSULTANCY
OF THE YEAR**

EDIE NET-ZERO
AWARDS 2026
SHORTLISTED

**BEST ADVOCACY
CAMPAIGN**

PUBLIC SECTOR

PURPOSE
AWARDS 2026
SHORTLISTED

**PR AGENCY
OF THE YEAR**

HEADLINEMONEY
AWARDS 2026
SHORTLISTED

**BEST PRO-ACTIVE
LOBBYING CAMPAIGN
ON AN ISSUE OR
CAUSE**

INCOMMS' CORPORATE
AFFAIRS AWARDS 2026
SHORTLISTED

**RESEARCH
INSTITUTE
OF THE YEAR**

EDIE NET-ZERO
AWARDS 2025
SHORTLISTED

**BEST CAMPAIGN
REAL ESTATE &
CONSTRUCTION**

PROVOKE SABRE EMEA
AWARDS 2024
SHORTLISTED

**PUBLIC AFFAIRS
CONSULTANCY
OF THE YEAR**

PROVOKE MEDIA
EMEA AWARDS 2024

**COMMUNICATIONS
AGENCY OF
THE YEAR**

EDIE NET-ZERO
AWARDS 2023

**PLANNING
CAMPAIGN
OF THE YEAR**

PRCA PUBLIC AFFAIRS
AWARDS 2020

Contact us

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