

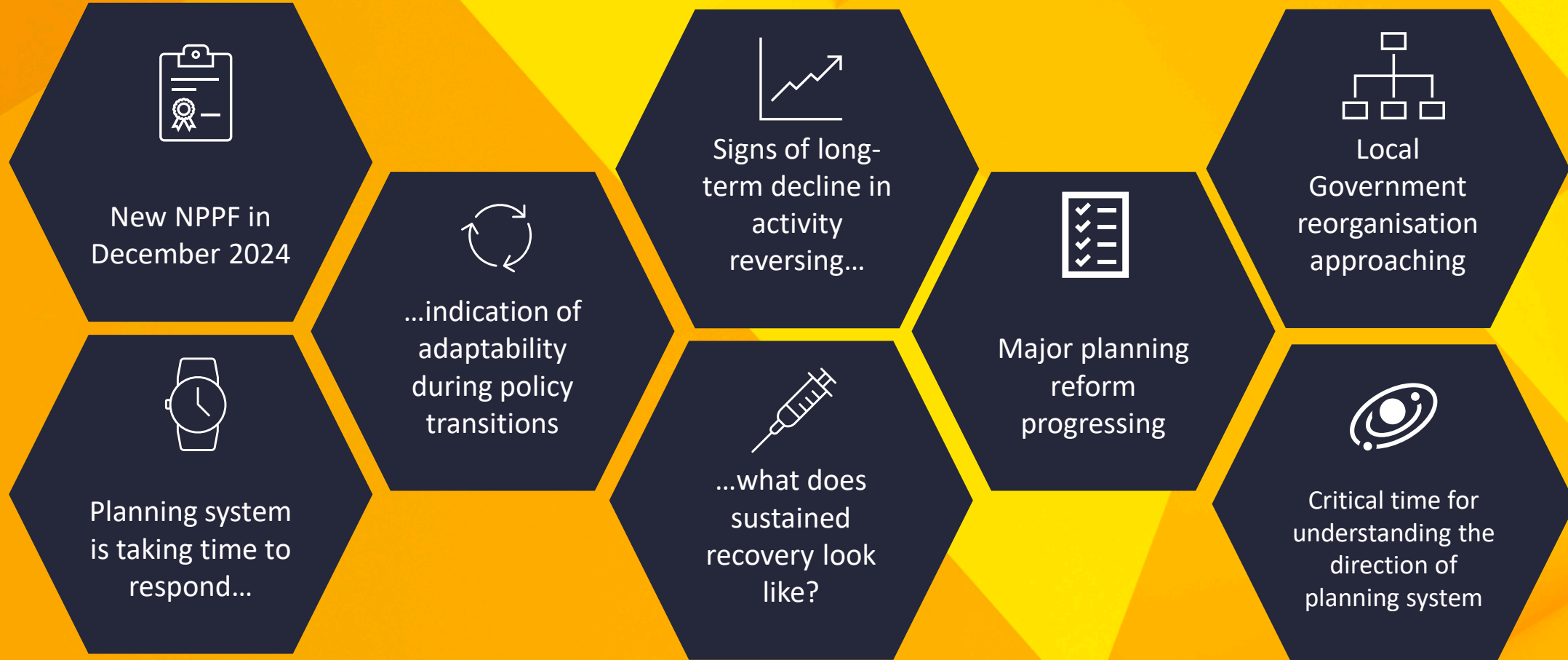
HBF PLANNING CONFERENCE 2025

Adapting to the revised NPPF

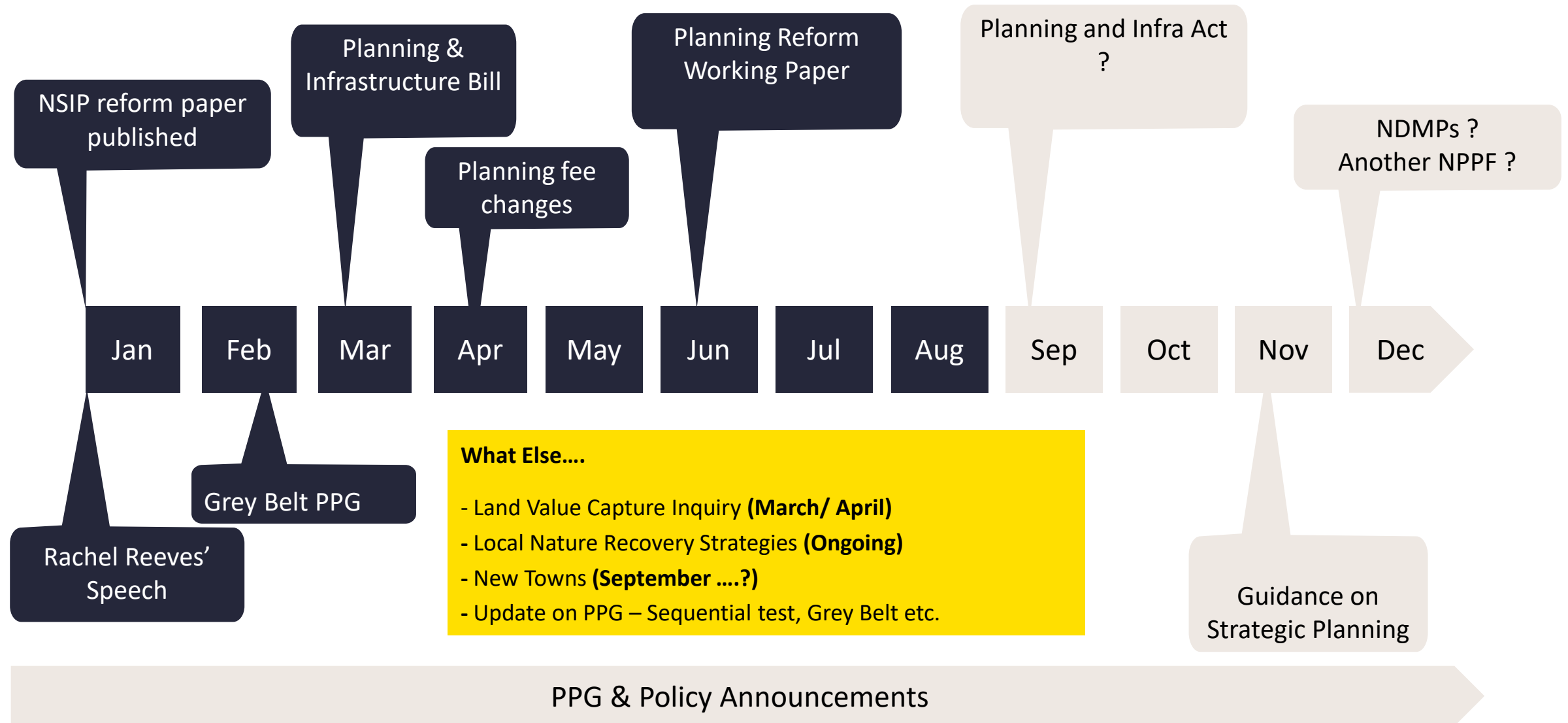
Emily Williams

Savills Residential Research

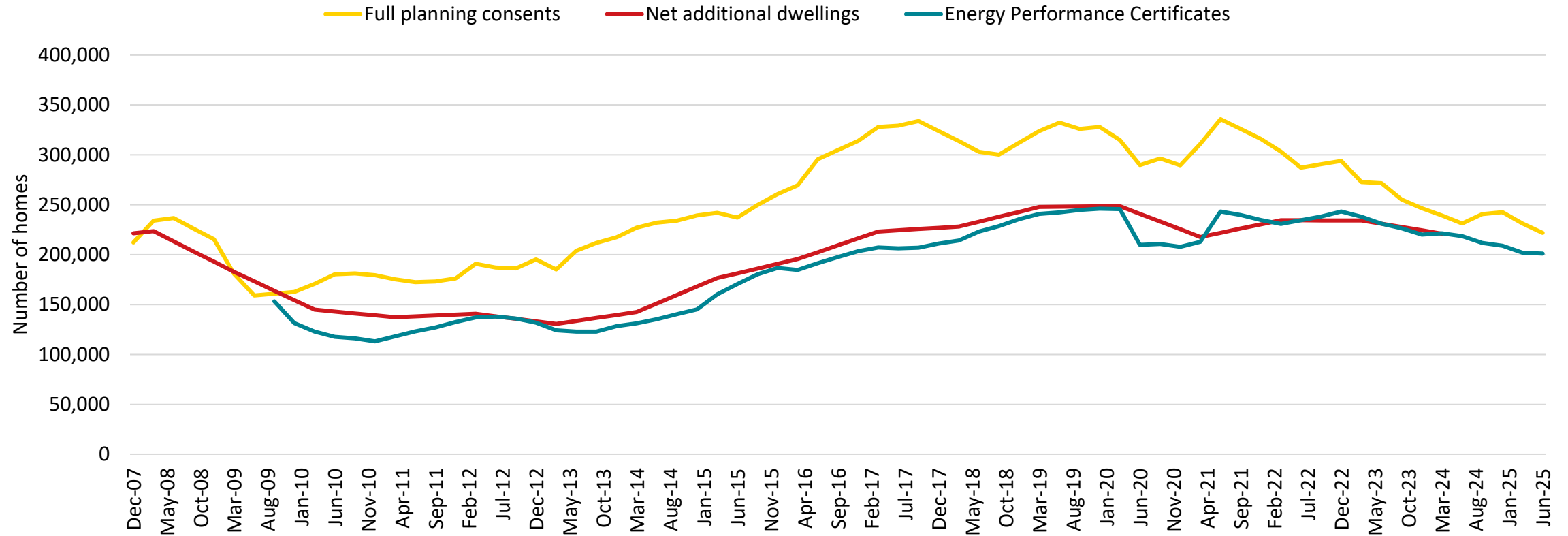
The 2025 Planning Agenda



2025 – more changes to come



Changes yet to reverse trend in consents



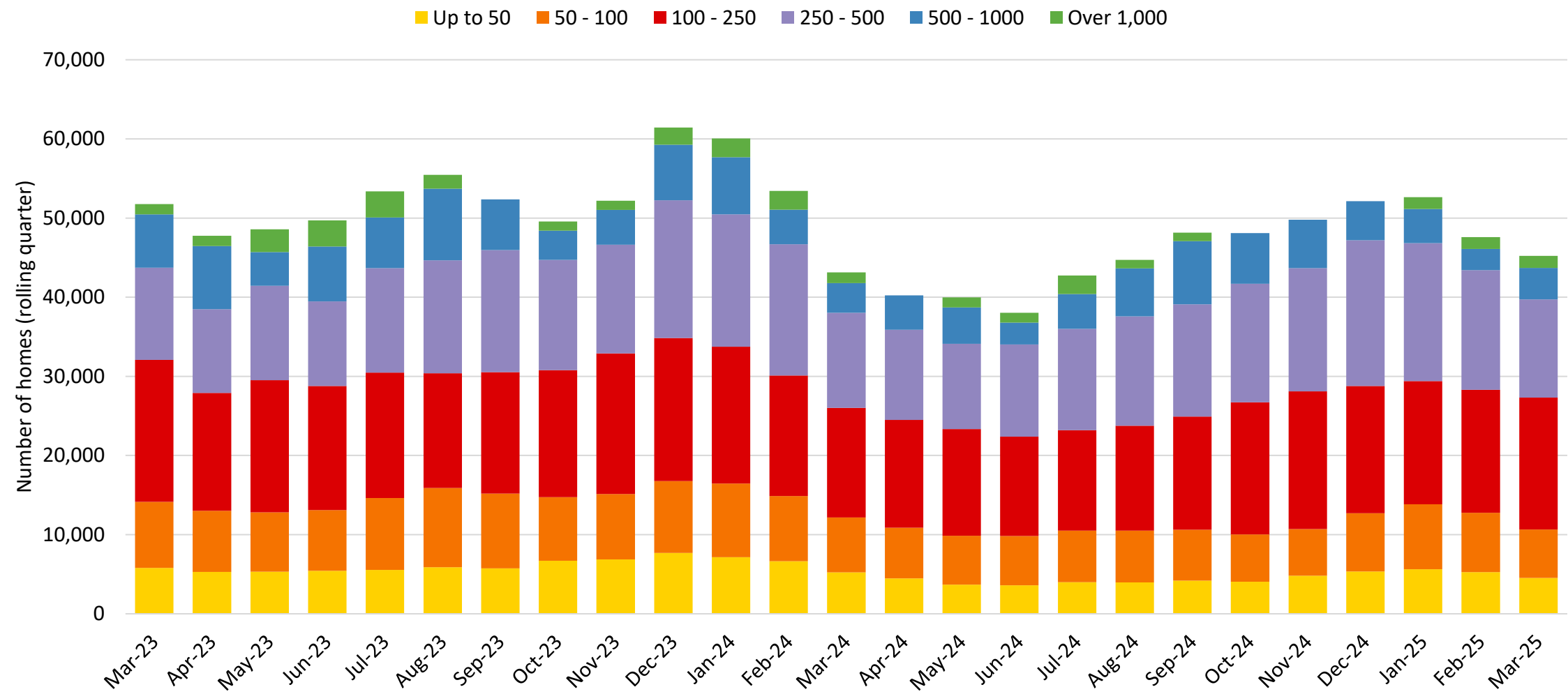
H1 2025 change v previous year

North	Midlands	South	All England
-32%	-19%	-12%	-19%

17.5%

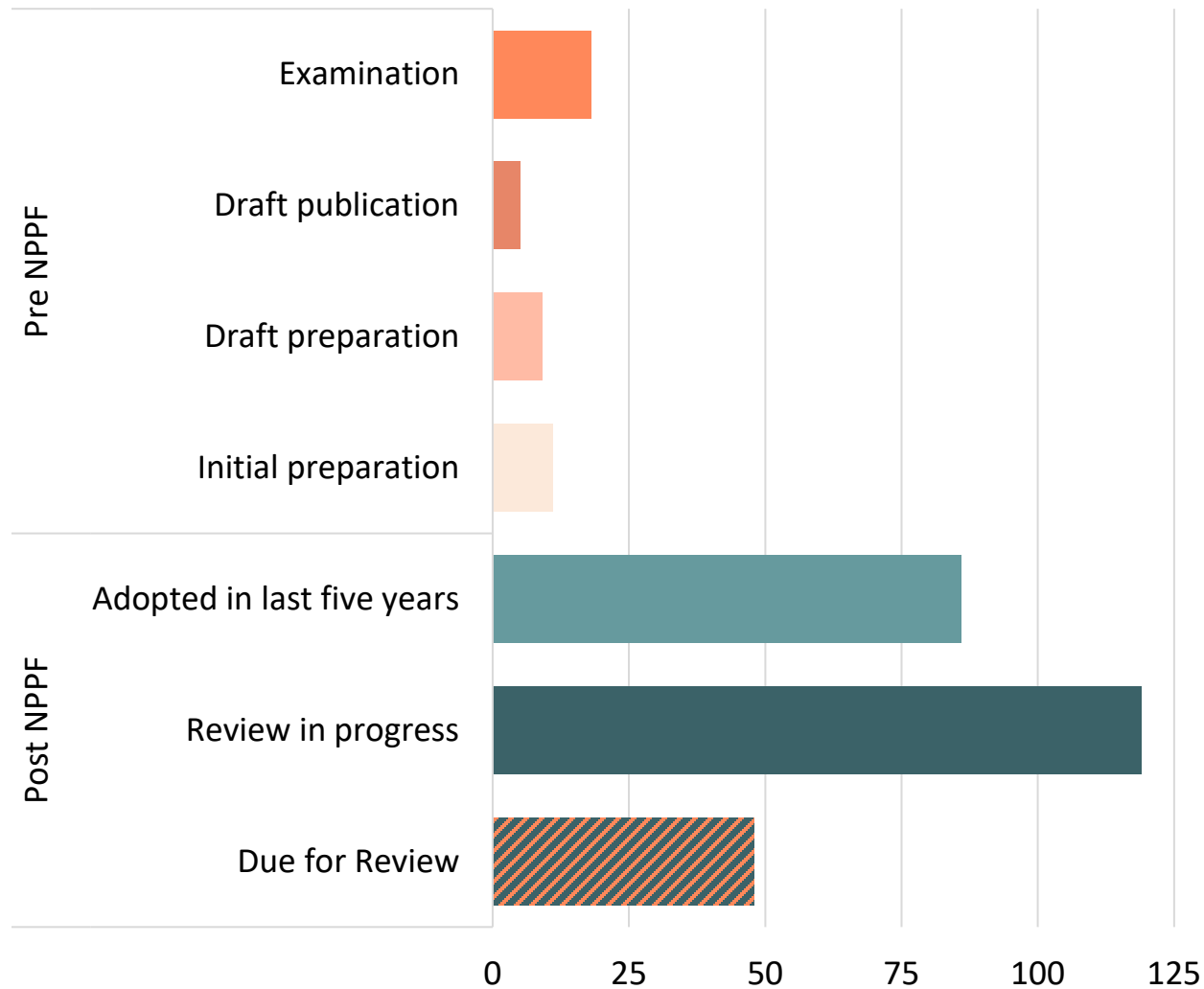
of consents granted in H1 2025
were delivered via appeal

No sign yet of an uptick in applications



Source: Glenigan

Slowing Local Plan activity

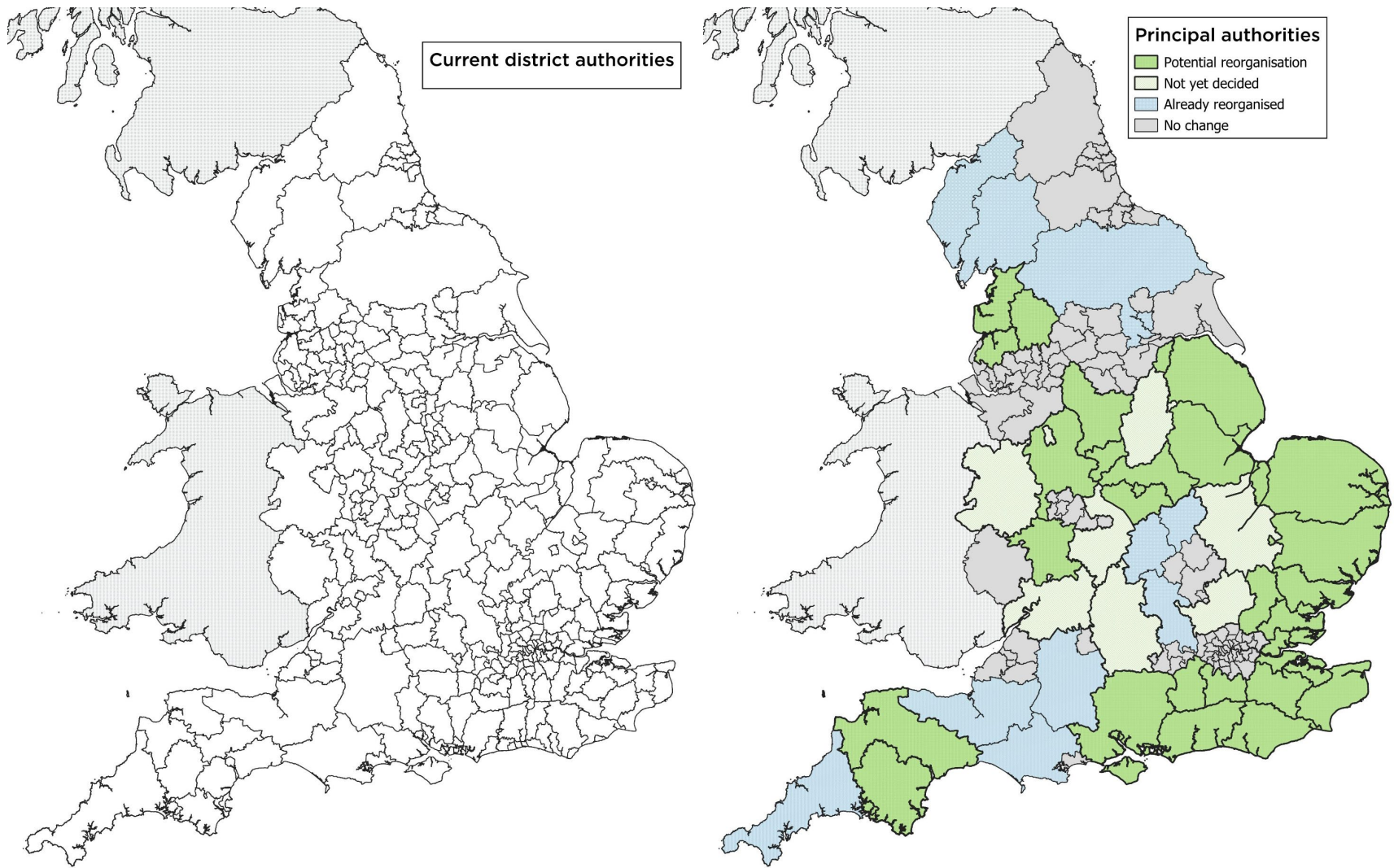


11 plans
submitted for
examination in
month before
12th March

41 plans
progressing
under old NPPF

5 plans
submitted for
examination
post 12th March

Redrawing the map



40%
potential reduction in principle
authorities anticipated through a
wave of mergers



Six areas
are on the “fast track” for a
devolution settlement

Increasing number of LPAs facing sanctions

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72%

of local plans are
over 5 years old

67%

of LPAs cannot
demonstrate a 5
yhls

60


LPAs face
presumption in
favour under the
HDT...

... projected to
rise to

c.100 in
November 2025

Thresholds will
increase further
once new SM is
included in
calculations

Not currently a
plan led system



The NPPF changes are yet to have a material impact on the volume of applications submitted or consents granted.

Weaker market conditions and lack of confidence have contributed to lower level of activity.

Clear signals are being sent through the appeals process.

Strengthened targets and land supply requirements will take time to feed into local decision-making.

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Thank you

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