LANDLENS™

Planning Intelligence Briefing

Monthly analysis of UK planning trends, policy changes & market signals

SAMPLE EDITION

Demonstrating report structure & content depth

FREE SAMPLE

Contents

1. Executive Summary

This sample edition uses Q1 2025 data — the most recent complete quarterly release from MHCLG at time of publication. Subscriber editions are updated quarterly as new official data is released.

In Q1 2025 (January–March), local planning authorities across England received approximately 90,700 planning applications — a 6% increase on the same quarter in 2024. Authorities decided 70,900 applications during the quarter, granting 61,500 of those — an overall national grant rate of 87%. This is a 2 percentage point improvement on the Q1 2024 grant rate.

KEY FINDING

Householder applications continue to dominate the pipeline, accounting for 51% of all decisions (36,200 applications decided) with a grant rate of 89%. Meanwhile, the North East recorded England's highest regional approval rate at 92%, whilst London remained lowest at 82% — a 10 percentage point gap highlighting persistent regional disparities.

70,900	87%	90%
▼ 10% YoY	▲ 2pp YoY	In time (major)
DECISIONS MADE	NATIONAL GRANT RATE	MAJOR APPS IN 13 WEEKS

This sample edition combines publicly reported MHCLG statistics with representative LandLens™ analytical formatting for demonstration purposes. Subscriber editions contain full methodology notes and authority-level data.

Sources: MHCLG/DLUHC Planning Application Statistics, England: Q1 2025 (published August 2025). Contains public sector information licensed under the Open Government Licence v3.0.

2. National Application Trends

Householder applications remained the dominant category at 51% of all decisions, maintaining a strong 89% grant rate. Residential applications granted totalled approximately 7,000 — an 11% year-on-year decline — whilst commercial grants fell to 1,500, also down 11% on Q1 2024.

APPLICATION TYPE	DECISIONS (Q1 2025)	GRANT RATE	YOY TREND
Householder	36,200	89%	51% of all decisions
Residential (all)	—	—	7,000 granted (−11% YoY)
Commercial	—	—	1,500 granted (−11% YoY)
All application types	70,900	87%	−10% YoY decisions

Source: MHCLG Planning Application Statistics Q1 2025. Volumes rounded to nearest 100 in line with official publication methodology.

Decision Speed Performance

Performance agreements continued to play a significant role, used in approximately 42% of all decisions. When these extensions of time are included, headline performance figures improve substantially — but strict statutory compliance tells a different story.

APPLICATION CATEGORY	WITHIN AGREED TIME	STRICT STATUTORY PERIOD
Major applications (13-week target)	90%	19%
Minor applications (8-week target)	88%	39%
Other applications (8-week target)	91%	58%

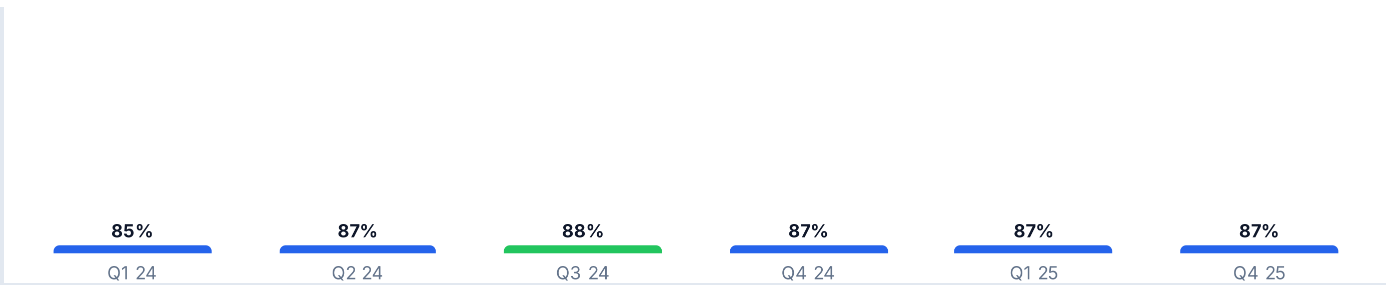
"Within agreed time" includes performance agreement extensions. "Strict statutory period" = within 13 weeks (major) or 8 weeks (minor/other) with no extension. Source: MHCLG Q1 2025.

Performance agreement and statutory period percentages derived from MHCLG planning performance tables, Q1 2025.

DECISION SPEED INSIGHT

Only 19% of major applications are decided within the strict 13-week statutory period — the rest rely on performance agreements or extensions of time. This gap between "official" and "real" performance is a critical metric for anyone managing application timelines.

National Grant Rate — Quarterly Trend (2024–2025)



Source: MHCLG Planning Application Statistics. Grant rate = applications granted as % of all decisions. 2024–2025 quarterly data.

3. Regional Approval Rates

Regional grant rates in Q1 2025 ranged from 82% in London to 92% in the North East — a 10 percentage point spread. National Parks continued to outperform most regions at 90%. The table below shows regional grant rates based on MHCLG data.

Regional Grant Rates — Q1 2025 (Based on MHCLG Planning Statistics Q1 2025)

REGION	GRANT RATE	VS NATIONAL AVG (87%)
North East	92%	+5pp
National Parks	90%	+3pp
West Midlands	89%	+2pp
East Midlands	88%	+1pp
North West	88%	+1pp
South East	87%	—
Yorkshire & the Humber	87%	—
East of England	86%	−1pp
London	82%	−5pp

Source: MHCLG Planning Application Statistics Q1 2025. Heatmap colour reflects distance from national average. London's lower rate reflects higher density, more complex applications, and stricter local policy environments.

Figures in this sample edition are representative of LandLens™ data methodology applied to selected application categories. National totals from DLUHC may differ as they include all application types. Subscriber editions contain full methodology notes.

4. Policy & Regulatory Updates

Several significant policy developments shaped the planning landscape in 2025, with direct implications for application strategy and timelines.

POLICY WATCH

The revised NPPF (December 2024) introduced stronger housing delivery expectations and updated the standard method for calculating local housing need. Biodiversity net gain requirements, mandatory since February 2024 for major developments and April 2024 for small sites, are now embedded in the system — but compliance quality varies significantly between authorities.

- **NPPF Revision (December 2024):** Updated standard method for housing need calculations, strengthened “grey belt” policy for previously developed Green Belt land, and reinforced the presumption in favour of sustainable development.
- **Biodiversity Net Gain (BNG):** Now mandatory for all developments since April 2024. The 10% net gain requirement is driving up ecological survey costs and extending pre-application timelines by an estimated 4–8 weeks.
- **Planning Fees:** The December 2024 fee increase (up to 25% for major applications) took effect — contributing to the 6% rise in applications received as applicants submitted ahead of the increase.
- **Performance Agreements:** Used in approximately 42% of all decisions nationally, masking the true speed of statutory determination. Subscriber editions include authority-level performance breakdowns.

5. Sector Analysis — Residential

Residential planning grants declined 11% year-on-year in Q1 2025, with approximately 7,000 residential applications granted during the quarter. Despite rising application volumes nationally (+6%), the conversion to granted permissions has tightened, particularly for major residential schemes.

7,000	36,200	89%
▼ 11% YoY	51% of decisions	Consistent
RESIDENTIAL GRANTED	HOUSEHOLDER DECISIONS	HOUSEHOLDER GRANT RATE

RESIDENTIAL INSIGHT

The contrast between strong householder approval rates (89%) and declining residential grants (−11%) suggests that smaller domestic projects remain straightforward, whilst larger residential development faces growing scrutiny — likely driven by BNG compliance, nutrient neutrality constraints, and updated local plan policies.

6. Sector Analysis — Commercial

Commercial planning grants fell to approximately 1,500 in Q1 2025, down 11% year-on-year. This mirrors the residential decline and reflects broader caution in development activity.

Commercial Grants

Approximately 1,500 commercial applications granted in Q1 2025, an 11% decline from Q1 2024. The contraction spans office, retail, and industrial categories, though logistics remains a relative bright spot.

Decision Speed Gap

Only 19% of major applications (including major commercial schemes) are decided within the strict 13-week statutory period. Performance agreements are propping up headline statistics — a key risk factor for time-sensitive commercial projects.

7. Market Signals & Opportunities

Three signals identified from Q1 2025 planning data patterns:

- **North East Outperformance:** The highest regional grant rate at 92% — five percentage points above the national average. Combined with lower land values and available brownfield stock, this region offers a favourable risk-adjusted environment for new applications.
- **Rising Application Volumes (+6% YoY):** Applications received are growing whilst decisions are contracting (−10%). This widening gap suggests a growing backlog — early-stage applicants should factor in extended determination periods, particularly for major schemes.
- **Performance Agreement Dependency:** With only 19% of major applications meeting strict statutory deadlines, the system is increasingly reliant on negotiated extensions. Subscriber editions include authority-level performance data to identify which councils consistently meet — or miss — their targets.

8. Year-End 2025 Context

For context, the full calendar year 2025 saw approximately 324,300 applications received (−2% YoY) and 300,600 decisions made (−5% YoY). The national grant rate remained stable at 87–88% throughout all four quarters, indicating systemic consistency despite volume fluctuations.

METRIC	Q1 2025	Q4 2025	FULL YEAR 2025
Applications Received	90,700	76,300	324,300
Decisions Made	70,900	72,700	300,600
Applications Granted	61,500	63,000	—
Grant Rate	87%	87%	87–88%

Source: MHCLG Planning Application Statistics quarterly releases, 2025. Q4 2025 data: received 76,300 (−4% YoY), decided 72,700 (−4% YoY), London 83%, National Parks 91%.

What Subscriber Editions Include

- **Authority-level data:** Grant rates, decision speeds, and backlog metrics for every LPA in England — not just regional averages.
- **Constraint change tracking:** New flood zones, conservation areas, Article 4 directions, and SSSI boundary changes mapped to individual sites.
- **Policy impact analysis:** How NPPF changes, BNG requirements, and local plan updates affect specific application types in your target areas.
- **Decision speed benchmarking:** Which authorities consistently meet statutory deadlines vs. those reliant on performance agreements.
- **Forward-looking signals:** Local plan examination dates, appeal trends, and emerging policy consultations that will shape future approvals.

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