

Housing Trajectory Build-out Rates Note – Spelthorne Borough Council

Executive Summary

- I. The Local Plan and anticipated housing trajectory rates of delivery are running against a national backdrop of a push to boost housing delivery and provide 1.5 million homes over the next five years. This is anticipated to speed up the process from application to completion
- II. The majority of sites in the Spelthorne Local Plan are of 100 units or less (33 out of 50). Both the Lichfields and Spelthorne Borough Council build-out rate historic data indicates that these sites are deliverable within the first five years of the Local Plan.
- III. Recent completions of larger sites (100-400 units) show that higher Build-out rates are achievable in Spelthorne, with the delivery of over 100 units per annum demonstrated on several sites. As such there is evidence to support similar build out rates on sites within the housing trajectory.
- IV. The Lichfields Start to Finish Study September 2024 found that sites of 500-999 units on average take 4.9 years to deliver from planning application being validated. Two sites in the Local Plan (ST4/009 and ST4/023) are of this size and their position in the housing trajectory (from the medium term onwards) allows enough time for planning processes to be completed and units delivered. Research also indicates a delivery rate of up to 143 units a year on sites of this size and the Council has evidence of larger schemes delivering a higher annual number of units.
- V. A stress test of build-out rates used in the housing trajectory indicates that whilst ambitious, delivery rates are achievable and the positioning of sites within the trajectory allows for the lead in times and planning process to take place.
- VI. Whilst analysis of build-out rate data is helpful in determining future forecasts, this needs to be supplemented with information on the current market, statements of common ground and information from site promoters who have local knowledge and expertise about the delivery of their site.
- VII. Regarding estate regeneration, a period of two years for the demolition and construction is achievable as demonstrated by the Thamesview House, Walton-on-Thames example.

1. Introduction

- 1.1. Spelthorne Borough Council's approach to Build-out Rates (BoRs) is informed by an analysis of multiple datasets in order to identify a realistic, robust and bespoke approach for Spelthorne. It was considered appropriate not to rely solely on a single dataset as this can lead to broad assumptions being employed that may not be accurate for sites with site-specific considerations.
- 1.2. The Planning for Housing Delivery report¹ (HOU001), forming part of the evidence base for the Spelthorne Local Plan, is a technical analysis produced using data available up to 2019. This analyses past BoRs in Spelthorne of different site size, whilst also considering the Lichfields "Start to Finish" study². Table 1 below is taken from the study, identifying BoRs on brownfield sites between 2010-2019. Whilst this report provides a useful guide, it is now considered somewhat out of date, with the time period from 2019 to 2025 not reflected in the analysis. Furthermore, the Spelthorne Local Plan identifies two allocation sites above the threshold of 400 units³ included within the study, therefore it is considered appropriate to revisit the data and address any gaps to produce an accurate picture of potential BoRs in Spelthorne.
- 1.3. Lichfields published the third edition of the "start to finish" study in September 2024⁴. Whilst this summarises data from 2023 and focusses on larger schemes it does present a guide on potential BoRs on sites of 50 dwellings or more. The research indicates sites smaller than 99 dwellings on average take 3.8 years to deliver units from a planning application being validated. Only 17/50 allocations in the Spelthorne Local Plan are 100 units or more indicating the majority of sites across the whole Local Plan are capable of delivering within a five-year period. Given that the Lichfields study focuses on large-scale development sites (over 50 units to 2000+ units), analysis of this study and its conclusions alone are not considered to be representative of the situation in Spelthorne. It is therefore appropriate to consider recent local data as part of this exercise to fully understand trends in BoRs in the borough.
- 1.4. In order to take account of more recent data within the [Housing Trajectory](#), the Council has produced its own analysis of past build-out rates using completions for different sizes and types of development in Spelthorne. The Council has utilised a range of data sources to determine the BoRs of individual sites, rather than solely relying on formulaic data. This is to ensure that a 'real world' approach is used. Data sources include:
 - HOU005 – Planning for Housing Delivery report, which analyses past BoRs and the Lichfields "Start to Finish" study for Spelthorne up to 2019.
 - Internal analysis of past completions by type and size
 - Understanding of individual sites
 - Statements of Common Ground and regular dialogue with site promoters, providing site-specific information.
 - Planning progress (i.e. pre application enquiries, planning applications)

¹ [General Report Template](#)

² Lichfields, Start to Finish, February 2020

³ ST4/009: Elmsleigh Centre and ST4/023: Two Rivers Retail Park Terrace

⁴ Lichfields "Start to Finish" How quickly do large-scale housing sites deliver? Third Edition September 2024.

- Strategic Land Availability Assessment and annual update of site data (i.e. developer plans, site constraints, changes in planning history, Development Management consultation)

Table 1: BoRs on brownfield sites by size capacity and CIL Zone, 2010-2019

CIL Zone	No Units	Total net new homes	Total construction period	BOR (avg units/mth)	BOR (avg units/yr)	Lichfield adjustment (year)	Lichfield adjustment (month)
One (North)	1 Unit	15	666	0.10	1		
	2-10 Units	58	786	0.32	4		
	11-50 Units	179	724	1.07	13		
	51-100 Units	62	172	1.56	19	20	1.70
	101-400 Units	152	74	8.95	107	81	6.76
Two (South)	1 Unit	47	2,066	0.10	1		
	2-10 Units	271	3,661	0.32	4		
	11-50 Units	345	1,527	0.98	12		
	51-100 Units	190	186	4.42	53	37	3.12
	101-400 Units	110	55	8.66	104	79	6.62
Three (South)	1 Unit	7	369	0.08	1		
	2-10 Units	67	1,203	0.24	3		
	11-50 Units	194	225	3.73	45		
	51-100 Units	95	145	2.83	34	28	2.33
	101-400 Units	194	210	4.00	48	52	4.29

Source: Spelthorne Borough Council and Lichfields

2. The National Agenda: Housing targets increased to get Britain building again

- 2.1 National Government has clearly set out its agenda to boost housing delivery across the country, with an overall aim of building 1.5 million new homes over the next five years. This mandate will require a step change in housing building and a push for economic growth will see pressure on housebuilders to quicken BoRs and deliver homes for those who need them. The Lichfields Start to Finish study identifies one of its six key conclusions as:

“Demand is a key driver of build-out rates. The absorption rate of the local housing market dictates the number of homes a builder will sell at a level that is consistent with the price they paid for the land. Areas with a higher demand for housing (measured by higher affordability ratios, of house prices to earnings) had higher average annual buildout rates than lower demand areas”⁵.

⁵ Lichfields “Start to Finish” How quickly do large-scale housing sites deliver? Third Edition September 2024.

2.2 Housing demand within the southeast of England is typically high, with the Local Plan allocations anticipated to boost the housing market and local provision within Spelthorne. Adoption of the Spelthorne Local Plan is anticipated to give developers certainty and confidence in the delivery of sites. A boost in housing delivery in Spelthorne as a result is expected to have knock on positive effects in the industry locally which in turn will help to speed up BoRs. 11 Green Belt sites are included in years 1-5 of the housing trajectory totaling 702 units, these sites cannot progress until the Local Plan is adopted and 10 of these sites have SoCG setting out delivery in the next five years. This indicates that there is market demand and as set out in the Lichfields Start to Finish Study this is a key driver of build-out rates.

3. Site Allocations

3.1 Generally, in the development industry it is accepted that there is a correlation between lead in times, build-out rates and the size of housing sites; smaller housing sites have shorter lead in times and lower build-out rates, whereas larger housing sites have longer lead in times and higher build-out rates.

3.2 Table 2 sets out analysis of Spelthorne monitoring data covering sites completed since 2017. Trends indicate that the delivery timeframes of schemes are fairly consistent despite their size.

Table 2: Period from Permission to Final Completion (weeks) - Spelthorne average 2017-2025

Scheme Size	Average Period from permission to final completion (weeks)	Average Period from permission to final completion (Months)	Average Period from permission to final completion (Years)
10-50 Units	128	29.5	2.46
51-100 Units	93	21	1.75
100+ Units	164	37.7	3.14

3.3 33 of 50 allocations in the Spelthorne Local Plan are 100 units or smaller. Given the reliance on smaller sites, as well as the average BoRs experienced in the past in Spelthorne, sites may be expected to deliver within 2.5 years from achieving planning permission. As such, there is opportunity for housing to be delivered on these sites within the first five years of the Plan.

3.4 17 of 33 site allocations of 100 units or less are included in years 1-5 of the housing trajectory meaning 52% of sites of this size are included later in the Local Plan. Spelthorne monitoring data and research however suggests that sites could be built out earlier showing a cautious approach has been taken to BoRs in the trajectory.

3.5 Five sites (ranging from 108-295 units) are in years 1-5 of the trajectory with build out ranging from 50 to 148 dwellings per annum. SoCGs have been provided in support of these sites, namely:

- [SE1/024: Annandale House, Sunbury](#)
- [ST1/037: Thameside House, Staines](#)
- [ST3/004: Oast House, Staines](#)
- [AT1/002: Land east of Ashford Sports Club, Ashford](#)
- [SN1/006: Land to the west of Long Lane and south of Blackburn Trading Estate](#)

3.6 Furthermore, Lichfields research September 2024⁶ shows that from the sample used, up to 122 units can be built out a year on sites of this size. Combined, this evidence indicates that the proposed units as set out in the housing trajectory can be achieved. The Council has further evidence of recently completed comparative sites where on average 104-226 units have been recorded in one year in Table 3. Higher BoRs are therefore achievable within Spelthorne as evidenced below.

Table 3: Spelthorne Sites - Completions recorded in one year.

Permission	Site	Town	Total units	Units recorded in one year
16/02019/PDO	Dolphin House	Sunbury	110	110 - 2018/19
09/00566/OUT	Majestic House	Staines	260	226 - 2020/21
17/01274/FUL	Brooklands College	Ashford	357	177 - 2020/21
17/01923/FUL	Charter Square Phase II	Staines	104	104 - 2021/22

Brownfield Sites

3.7 The Spelthorne Local Plan contains 35 allocations within the urban area on brownfield land. They are split by size as follows:

No. units	Schemes	Total Units
<50	14	277
50-99	6	383
100-199	7	1045
200-399	5	1463
400+	3	2000

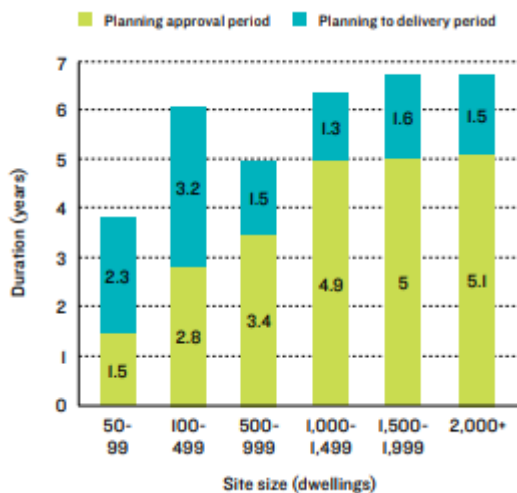
3.8 On average, a conservative approach to BoRs has been employed, however there are instances where higher rates have been projected. Within the first five years of the Plan, two sites anticipate delivery of 100 or more units per year, with only one site brownfield land (SE1/024). Within the SoCG for this site, the site promoter has indicated that development would be delivered within a single phase of construction

⁶ Lichfields "Start to Finish" How quickly do large-scale housing sites deliver? Third Edition September 2024.

taking place over 24 months. Furthermore, the site is in single ownership, is not subject to any notable constraints and pre-application discussions have taken place.

- 3.9 The Lichfields Study September 2024 found that sites of 500-999 units on average take 4.9 years to deliver from planning application being validated. Two sites in the Local Plan (ST4/009 and ST4/023) are of this size and their position in the housing trajectory (from the medium term onwards) allows enough time for planning processes to be completed and units delivered. Research also indicated a delivery rate of up to 143 units a year on sites of this size and the Council as set out in paragraph 2.3 above has evidence of larger schemes delivering a higher annual number of units.
- 3.10 ST4/023 has a [SoCG](#) and information has been provided confirming that the planning process will be undertaken to enable delivery from 2032.
- 3.11 Smaller brownfield sites (less than 100 units) comprise a large proportion of the site allocations in the Local Plan and the typically shorter delivery period (Table 2 above and Figure 1 below) indicates that delivery is achievable as set out within the housing trajectory.

Figure 1: Average (mean) timeframes from validation of the first dwelling



Source: Lichfields Analysis: Lichfields “Start to Finish” How quickly do large-scale housing sites deliver? Third Edition September 2024.

Greenfield Sites

- 3.12 The BoRs of greenfield sites are typically faster than those for brownfield sites. This is supported by the Planning for Housing Delivery report (HOU001). This sets out that the “Start to Finish” study produced by consultants Lichfields suggests that greenfield sites, on average, have a BoR that is 34% higher than brownfield. This is in line with the evidence looking at BoRs on brownfield sites in Spelthorne⁷.
- 3.13 The greenfield site allocations in the Spelthorne Local Plan are considered to be straightforward in their delivery and are not subject to any overriding constraints. In total there are 13 greenfield allocations for residential dwellings, with a modest delivery

⁷ HOU001 - Planning for Housing Delivery Paragraph 5.11

projected for each site. The largest site of this nature is for 200 units with the delivery of 100 units per year. The SoCG for this site sets out that contractors have been consulted and indicate delivery of 100 units a year. This forecast within the housing trajectory is based on information provided by the site promoter and the BoRs used are consistent with Table 5, taken from the Housing Delivery Report.

Table 4: BOR on greenfield sites by size capacity by CIL Zone, 2010-2019

CIL Zone	No Units	BOR (avg units/mth)	BOR (avg units/yr)	Lichfield adjustment (year)	Lichfield adjustment (month)
One	1 Unit	0.14	2		
	2-10 Units	0.49	6		
	11-50 Units	1.43	17		
	51-100 Units	2.09	25	29	2.46
	101-400 Units	11.99	144	109	9.06
Two	1 Unit	0.15	2		
	2-10 Units	0.45	5		
	11-50 Units	1.41	17		
	51-100 Units	5.92	71	50	4.19
	101-400 Units	11.60	139	106	8.87
Three	1 Unit	0.11	1		
	2-10 Units	0.32	4		
	11-50 Units	2.42	29		
	51-100 Units	3.79	46	38	3.13
	101-400 Units	5.36	64	69	5.75

Source: Spelthorne Borough Council and Lichfields

4. Analysis of Build-out Rates

- 4.1 To stress-test the approach to BoRs taken in the housing trajectory, SBC has carried out an exercise whereby BoRs have been applied to the anticipated completion date of development schemes in reverse to determine when the start date would need to be. This in turn will show whether the assumptions used are achievable based on the size and nature of each scheme.
- 4.2 BoRs are not consistent and vary by location as well as type of development. In addition, differing sample sizes may yield different results and market conditions may affect the rate at which schemes are built out. Given the variability in BoRs, SBC has tested its sites against several different BoR approaches:
- Historic BoRs in Spelthorne (2017-2025)
 - Planning to Delivery Report⁸ (HOU001), Table 15 (Spelthorne data and Lichfields adjustment)
 - Lichfields Start to Finish Edition 3, 2024 - Average build-out rate by size of site (dwellings)
- 4.3 Appendix 1 provides a sample of this analysis for sites expected to deliver homes in the medium term. Both the Spelthorne historic data and Lichfields report show that

⁸ Data up to 2019

completions are achievable within the anticipated delivery timeframes. Start dates are shown in the table in Appendix 1 and are highlighted to indicate whether or not the scheme would likely complete as per the anticipated BoRs and start date. Cells highlighted green indicate where the required start date falls within the projected housing trajectory timeframe. Using historic data from SBC completions and the Lichfields Start to Finish maximum data point, all medium-term developments are deliverable as per the housing trajectory timeframes. ST3/014, highlighted yellow is shown to be a marginal. ST4/023 would require a much earlier start date than anticipated within the trajectory based on two of the BoR scenarios, however Table 1 above does not provide data on sites above 400 units and site-specific considerations are not taken into account in this analysis.

- 4.4 Assuming the maximum data point as per the Lichfields study, all sites can deliver within the housing trajectory timeframe. Whilst ambitious, this is achievable and higher build-out rates are supported by historic BoRs of larger schemes in Spelthorne (Table 2). Furthermore, the Government agenda to boost housing supply as explained earlier in this paper is anticipated to boost housing delivery in the borough once the Local Plan is adopted.
- 4.5 Whilst this analysis is somewhat crude and does not fully cover lead-in times, it provides a rough indication of the expected delivery time periods of the larger sites allocated within the Spelthorne Local Plan. The lead in times for development i.e. to get to the stage of achieving planning permission, can run ahead of a site being available for development and many elements can run in parallel so that delivery of units can be achieved within the anticipated timeframe. The Lichfields study sets out that sites of 500-999 on average have a planning approval period of 3.4 years with a planning to delivery period of 1.5 years. The position of larger sites within the housing trajectory builds in an allowance for the planning process to be undertaken, with the ability of a planning application to run in parallel to a site becoming available for development. As such, the delivery of sites as set out in the trajectory is considered to be achievable.

5. Estate Regeneration

- 5.1 Two allocations in the Local Plan are for estate regeneration, SC1/021 and SN1/012. Estate regeneration does have to factor in the process of demolition and construction of new buildings. SoCG from [2023](#) and [2025](#) set out that A2Dominion Group are now advanced on their background surveys and are developing masterplans for both sites providing details on planning and likely delivery timelines.
- 5.2 The Council has further evidence of a comparable estate regeneration scheme recently approved in a neighboring authority. Thamesview House Felix Road Walton-On-Thames Surrey planning permission 2019/3601 included the demolition of the existing building containing 64 flats and a Pre-School on the ground floor. The building is being replaced with a part six and part nine-storey building containing 97 flats and a nursery at ground floor level. The Preliminary Construction and Demolition Management Plan [3517358.pdf](#) sets out the overall construction programme is anticipated to last for 24 months, the new structure will be constructed in a single phase of building. The following sequence of construction activities is expected:

- Site clearance and demolition;
- Excavation for foundations and below ground drainage and services;
- Construction of foundations;
- Construction of new building structures above ground;
- External works to car park and landscaping;
- Building services, fit out and commissioning.

5.3 This provides a local example of the redevelopment of an existing building and is for 97 units in one block demonstrating the likely demolition and construction programme for a phased scheme.

Appendix 1: Medium-term Allocation Sites and Build-out Rate Analysis

Site ID	Name	Address	Units	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	Anticipated Comp date	SBC permission to comp (weeks)	Years	Months	SBC Start date	Lich adj. units/month	Years	Months	HOU001 Table 15 start date (Lichf and SBC)	Upper Quartile dpa BoR	Years	Months	Start date	Maximum data point dpa (Lichf)	Years	Months	Start date
SC1/021	Land at Spelthorne Grove	Spelthorne Grove	250	50	50	50	50	50	0	31/03/2033	164	3.15	37.8	28/02/2030	6.62	3.1	37.8	28/02/2030	60	4.17	50.0	31/01/2029	122	2.05	24.6	31/03/2031
SC1/006	Tesco Extra	Escot Road	225	0	45	45	45	45	45	31/03/2034	164	3.15	37.8	28/02/2031	6.62	2.8	34.0	30/06/2031	60	3.75	45.0	30/06/2030	122	1.84	22.1	31/05/2032
AS1/001	Tesco Extra	Town Lane	350	0	70	70	70	70	70	31/03/2034	164	3.15	37.8	28/02/2031	6.76	4.3	51.8	31/12/2029	60	5.83	70.0	31/05/2028	122	2.87	34.4	31/05/2031
ST3/014	Birch House/London Road	Fairfield Avenue	400	0	80	80	80	80	80	31/03/2034	164	3.15	37.8	28/02/2031	6.62	5.0	60.4	31/03/2029	83	4.82	57.8	30/06/2029	143	2.80	33.6	30/06/2031
ST4/023	Two Rivers Retail Park Terrace	Mustard Mill Road	750	0	150	150	150	150	150	31/03/2034	164	3.15	37.8	28/02/2031	6.62	9.4	113.3	31/10/2024	83	9.04	108.4	31/03/2025	143	5.24	62.9	31/01/2029