



Housing delivery trends in Hampshire 2000-2020

Analysis of key trends on sites of 100-399 dwellings

November 2021

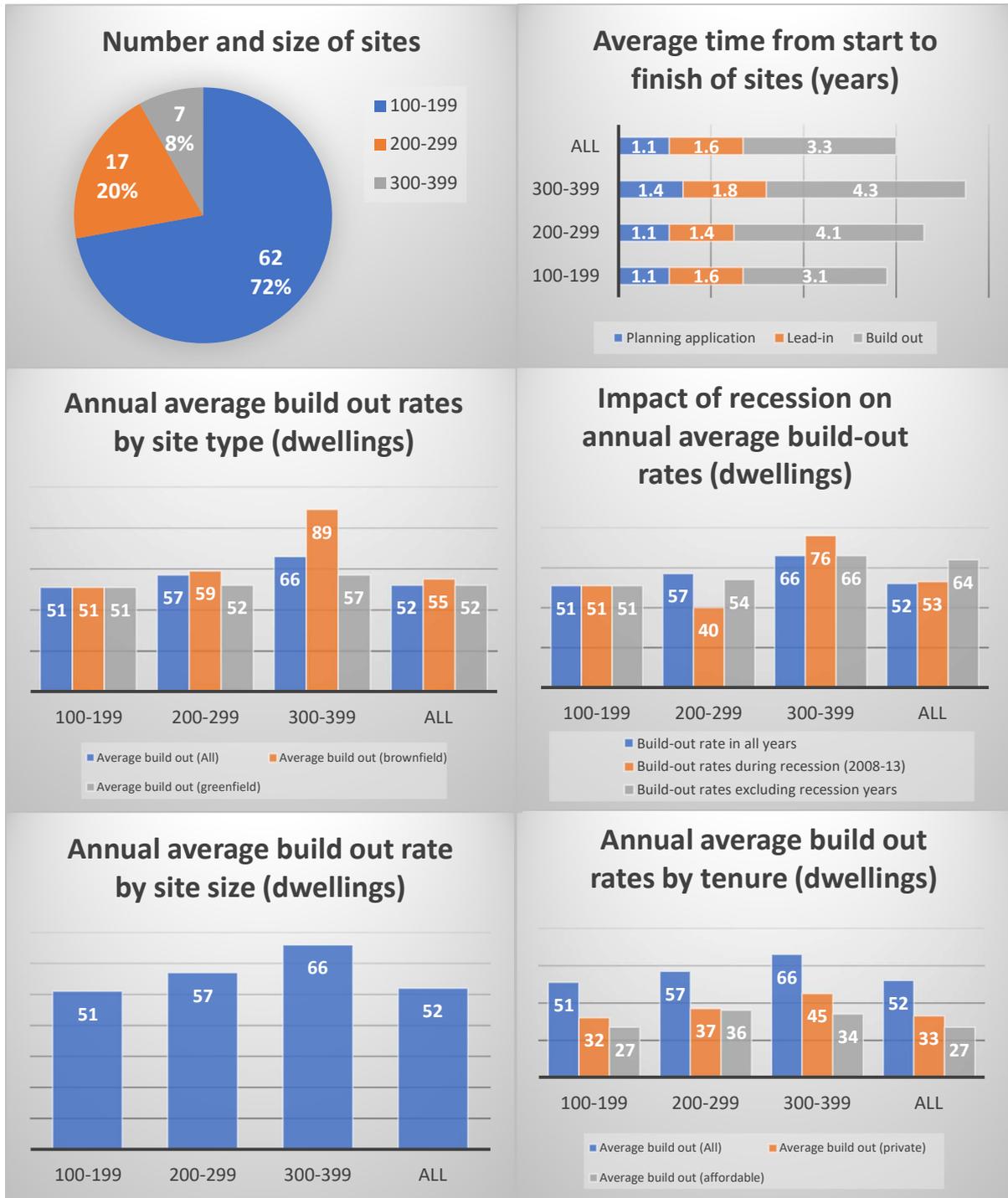


Hampshire
County Council

EXECUTIVE SUMMARY

- Sites of 100-399 dwellings in size delivered 15,133 dwellings and contributed 11.1% of the total net additional dwellings in Hampshire between 2000 and 2020
- 86 sites observed in total, of which 72% were 100-199 dwellings in size
- Typically, sites took 5.8 years to be built out from a planning application being first registered
- These sites had average build out rates of 52 dwellings per annum. Within this figure:
 - Brownfield sites typically were built out slightly faster than greenfield
 - Open market housing was built out slightly faster than affordable housing
 - Little evidence of recessionary impacts on delivery, albeit in the period 2008-13 affordable housing had a higher build out rate than private market housing

KEY FINDINGS AT A GLANCE



Notes:

- i) the average trends presented above are based on median averages
- ii) the lower build out rates by split of tenure reflect many sites delivering both private and affordable housing

2. Methodology

- 2.1. The evidence produced in this report explores how sites delivering a total of 100-399 dwellings have built out across Hampshire over the last 20 years. This includes the lead-in time of sites prior to commencement of development, as well as the subsequent build-out rates.
- 2.2. The data itself has been derived from Hampshire County Council's Land Availability Monitoring System (LAMS). This service monitors land development across Hampshire on behalf of the local planning authorities within Hampshire, including the two unitary authorities of Southampton and Portsmouth.
- 2.3. The LAMS system holds data from when a relevant application is first registered with a local authority and follows the application(s) to permission through to site commencement and finally site completion. The development data is drawn from a number of sources including Building Control commencements and completions, National House-Builder Council reports and annual site visits.

Site selection

- 2.4. The criteria of sites for inclusion in this report were:
 - Sites where 100 – 399 dwellings were delivered;
 - Where the first application was registered with the relevant local planning authority on or after 1st April 2000; and
 - The site had been fully completed by 31st March 2020
- 2.5. A total of 86 sites met this criteria across Hampshire, and these sites yielded 15,133 dwellings. Appendix 1 identifies the broad location of these sites across Hampshire with further details of site names and number of dwellings set out in Appendix 2.
- 2.6. Of the 86 sites, 56 applications were for full planning permission, 29 started with an outline application before proceeding to a reserved matters application and 1 application was a prior approval site. This study does not provide a detailed analysis of the length of time for permission to be granted by application type.

Site size

- 2.7. The sites were then split into three size categories for further analysis within this report:
 - 100 – 199 dwellings (of which there were 62 sites and a yield of 8,498 dwellings)
 - 200 – 299 dwellings (of which there were 17 sites and a yield of 4,262 dwellings)
 - 300 - 399 dwellings (of which there were 7 sites and yield of 2,373 dwellings)

Development process

- 2.8. The data in this report covers three distinct parts of the development process:

- A. **The planning approval process.** Note: for the purposes of this study - the period from the date of the first application registered on site until the decision date of the first detailed application to permit dwellings
- B. **Lead-in times.** Note: for the purposes of this study this covers the period from the date of approval of the first detailed application to permit dwellings to the date of the first completion on site. It is recognised that there may be subsequent detailed planning applications on a site. This falls outside of the scope of this study.
- C. **Build-out.** Note: for the purposes of this study this covers the period from site commencement to site completion and includes consideration of the annual completion figures on each site.
- 2.9. It is acknowledged that in some instances, there are overlaps between the different parts of the process. For example, the discharge of pre-commencement planning conditions occurs after planning permission is granted and can prevent development from lawfully commencing. Conversely, some preparations of the site (and assembling the construction team) can sometimes occur prior to formal approval of planning permission. For the purposes of this report, the processes are reported as distinct, consecutive processes rather than seeking to estimate potential overlaps.

Time periods

- 2.10. The report covers three different time periods:
- 2000-2008 which cover the 8 years leading up to the 'global financial crisis';
 - 2008-2013 - this covers the 2008/9 recession and resultant economic downturn period. GDP only recovered to pre-recessionary levels in 2013; and
 - 2013-2020 which covers the 7 years since the UK economy returned to pre-recessionary levels.
- 2.11. A monitoring year for the purposes of this study runs from 1 April to 31 March.

Mean vs median

- 2.12. The analysis in the main body of this report uses median averages in interpreting the data, with the alternative mean averages set out in Appendix 3. The median enables outliers in data to be taken into account in a way which does not unintentionally distort the trends found in the majority of the sites.
- 2.13. With regard lead-in periods, there were three notable sites² that could be regarded as skewing the mean average figures considerably. Such incidents are considered rare, unforeseen at the time of determination of the application and unlikely to be repeated in the future.

² Land Between Albert Road South/Canute Road in Southampton (04/01290/FUL) took over 13 years between first detailed approval and first dwelling completed on site, whilst the Riverside Site in Lymington (82337) took nearly 10 years. The Silent Garden site in Liphook (26295/006/FUL) took over 7 years.

- 2.14. Turning to the build-out periods, there are two sites³ which represent outliers of data which are a factor in considering rates of delivery on sites of 200-299. Given the particular characteristics of these two developments, all dwellings were recorded as completed in a single year which is acknowledged to be atypical of the majority of other sites of this scale.

Comparison with Lichfields 'Start to Finish' study

- 2.15. Lichfields published the second edition of its highly regarded 'Start to Finish' ⁴analysis of large-scale housing sites in February 2020. This examined the time taken for 180 large sites to progress from planning application to completion across the country. Of these, 83 sites were between 50-499 dwellings in size. A mixture of median and mean figures are used throughout the report. The Lichfields report doesn't specify the period of time that it has examined, albeit it is noted that the earliest completions observed were 1989/90 for Velmead Farm in Hart.
- 2.16. The Lichfields report is unclear how the 180 sites that it examined were selected. It does however note that "efforts were made to secure a range of locations and site sizes in the sample". Significantly however, it goes on to state that "*there is no way of ensuring it is representative of the housing market in England and Wales as a whole, and thus our conclusions may not be applicable in all areas or on all sites*"
- 2.17. In contrast this study analyses 86 sites delivering between 100-399 dwellings in size across Hampshire. Whilst the site size analysed differs slightly, this is not considered to undermine the validity of comparing the two studies. The time period of this study is for those applications first registered on or after 1 April 2000 and completed by 31 March 2020. The Lichfields report observes a longer (unspecified) time period. In some respects therefore, this study could be considered to provide a more contemporary understanding of trends in Hampshire. For clarity, the main body of this report provides analysis based solely on median trends (with the mean trends presented in Appendix 3) rather than a mixture of mean and median as presented by the Lichfields report.

³ Churchill Plaza in Basingstoke (ref: 17/00416/GPDOFF approved in April 2017) was a change of use from office space to 285 dwellings which used the prior approval process (Note: the only prior approval scheme within the report) and a scheme for 253 flats at 250 Farnborough Road, Farnborough which again was completed in a single year.

⁴ [Start to Finish \(second edition\): What factors affect the build-out rates of large scale housing sites? \(lichfields.uk\)](https://www.lichfields.uk)

3. Planning approval & lead-in times

3.1. The submission of a planning application usually represents the culmination of a significant amount of prior work e.g. initial site promotion, preliminary surveys, design works etc. Nevertheless, the focus of this section is in considering the typical time taken for sites to come forward from the planning application being first registered, to the first dwelling completion on the site. Because the data available to the study did not consistently indicate the date of the first dwelling completion (recorded by end of year site visit rather than by building inspector report), the completion date was estimated by taking the midpoint of the monitoring year in which dwelling completions were first recorded.

Variety of approval processes

3.2. The planning system enables different approaches to be taken by a potential applicant in securing the necessary consents. During the period observed in this study, there were three different approaches observed across the sites analysed:

- a full planning application where all matters are considered and approved. This was the case for 56 schemes;
- an initial outline planning application followed by applications for approval for reserved matters. This was the case for 29 schemes; and
- prior approval for the change of use of a site to residential through permitted development rights. There was 1 scheme that this applied to as detailed in Paragraph 2.2 of this Report.

3.3. A breakdown of these different consent processes across the different site sizes is set out in Table 3.1 below.

Table 3.1

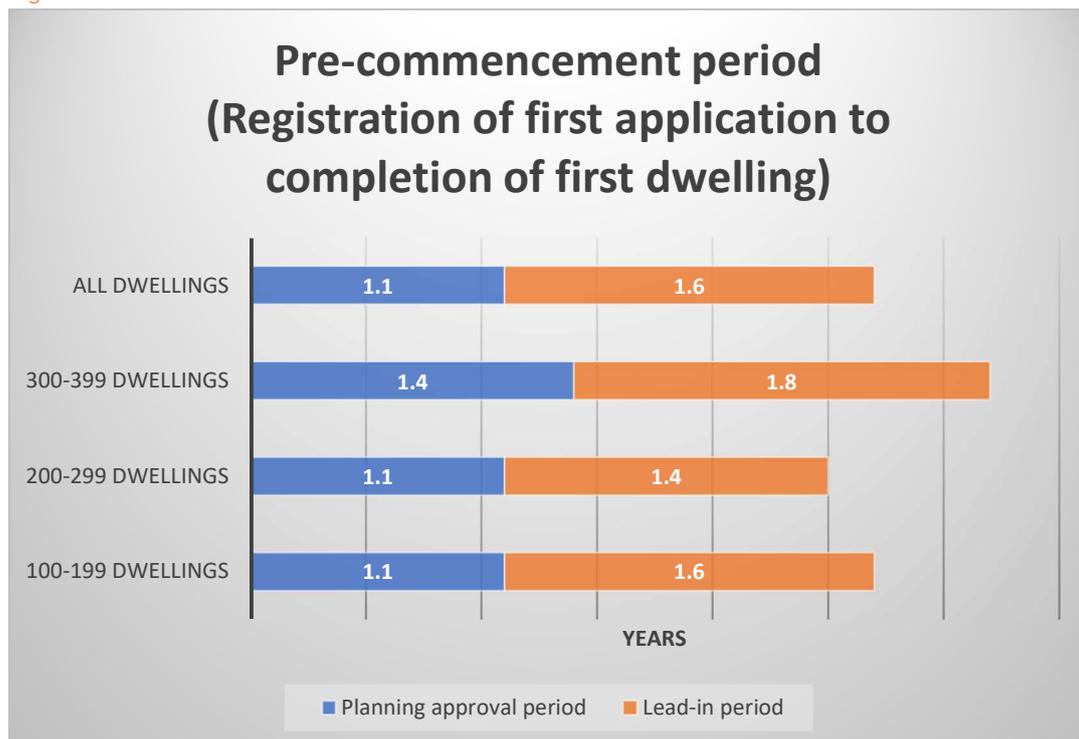
Number of Dwellings on Site	Full Planning Applications	Outline Planning Applications	Prior approval	All Applications
100-199	39	22	0	61
200-299	13	3	1	17
300-399	4	4	0	8
All sites	56	29	1	86

Time taken

3.4. Figure 3.2 below indicates that, on average across the 86 sites, it took 1.1 years for planning approval to be granted. This is calculated from the date of the first registration of a planning application by the local planning authority to securing the necessary detailed consents for development to commence. This average includes those outline applications originally registered that were subsequently supported by reserved matters applications i.e. the period counted is from the outline being registered to the first relevant reserved matters application being permitted.

- 3.5. Once permission was granted, the subsequent lead-in time before the first dwelling was completed, on average across all sites took 1.6 years.
- 3.6. In total therefore, across all sites, it took an average of 2.7 years from first registration of a planning application with the local planning authority to the first dwelling being completed on site.
- 3.7. Figure 3.2 also provides a breakdown of the variations across site sizes. It illustrates that there was little variation in the planning approval period irrespective of development size. The only variation being that it took an additional 0.3 years on average to obtain planning approval on sites delivering 300-399 dwellings compared to those delivering 100-299 dwellings.
- 3.8. In terms of the lead-in time period, Figure 3.2 also shows that sites of 200-299 dwellings delivered the first dwelling an average of 0.2 years sooner than sites of 100-199 dwellings and 0.4 years sooner than site of 300-399 dwellings following the granting of detailed planning consent.

Figure 3.2

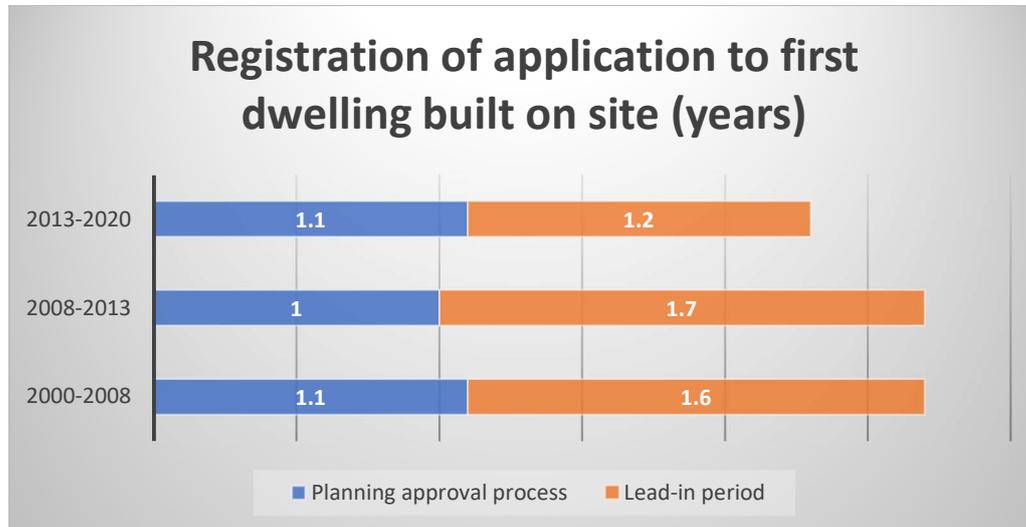


Difference in time taken across time periods

- 3.9. It is also possible to consider how the planning approval period and lead-in period varies over time and across the different site sizes. As shown in Figure 3.3 below, there is very little change in the typical length of time that a planning application took to be approved across the different time periods (only ranging between 1 and 1.1 years). Turning to the lead-in times however, there appears to be a general trend to a reduced lead-in time across the time

periods, albeit rising slightly from an average of 1.6 years to 1.7 years in 2008-2013, then falling to 1.2 years in the period 2013-2020.

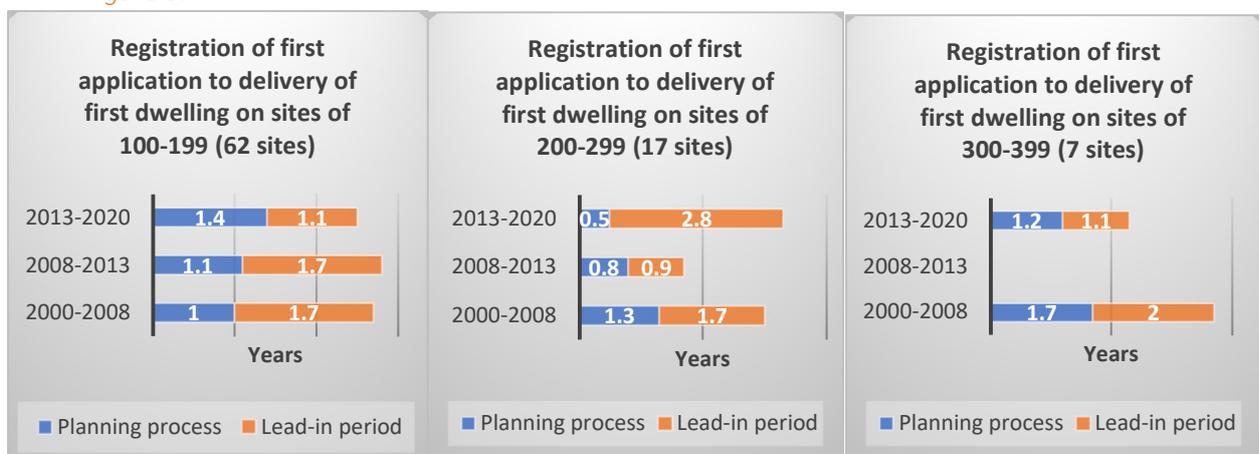
Figure 3.3



3.10. Across the period observed, there has been a general trend towards a reduction in the length of time taken by local planning authorities to determine planning applications for sites of 200 or more dwellings, compared with an increase in the length of time taken to determine sites of 100-199 dwellings in size, as shown in Figure 3.4.

3.11. When considering the subsequent lead-in time to commencement across the period observed, there was also a general trend towards a reduction in the time taken for developers to complete the first dwelling across all sites. However in the period 2008-2013, sites of 100-199 dwellings continued to take an average of 1.7 years. On sites of 200-299 dwellings, lead-in times decreased in the period 2008-13 before increasing again in the period 2013-20. It is also noted that no sites of 300-399 dwellings were consented in the period 2008-2013.

Figure 3.4



Summary of key findings

The following key findings are identified:

i. Planning approval process

- a. Across all sites, it takes an average of 1.1 years for the necessary detailed planning approval to be secured from the time that the original application (which could be an outline) is submitted to the local planning authority. This has remained relatively constant between 2000 and 2020.
- b. Generally, the length of time taken to approve sites of 200 or more dwellings during this time period has reduced, whilst the approval of sites of 100-199 dwellings has increased in recent years.

ii. Lead-in period

- a. Across all sites, the average lead-in period for the delivery of the first dwelling after permission was granted was 1.6 years. Trends observed suggest that the lead-in period reduced from 1.7 years in the period 2000-2008 to 1.1 years in the period 2013-2020.
- b. The reduction in lead-in periods appears to be consistent across all site sizes, albeit with an increase in time observed for sites delivering 100-199 dwellings in the 2008-2013 period.

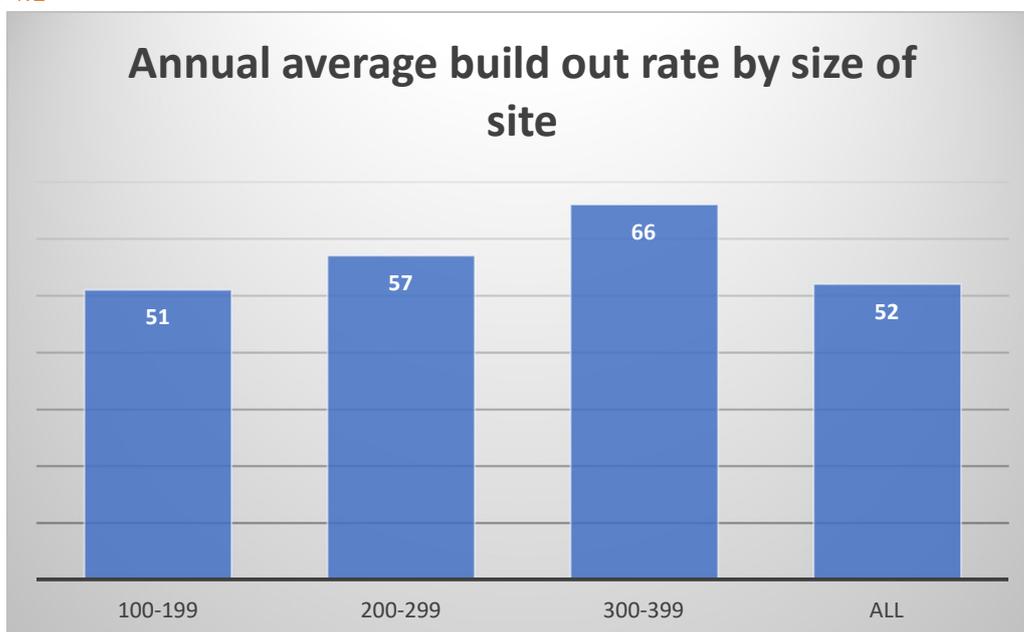
4. How quickly do sites build-out?

- 4.1. As discussed in Section 3, the commencement of physical works on a site is often preceded by a number of years of pre-commencement activity including initial site promotion, securing a site allocation in a development plan, acquiring the necessary consents and the discharge of pre-commencement conditions.
- 4.2. The building-out of a site provides the opportunity for the developer to begin to realise the significant investment made, albeit the construction itself is a further significant expense for the developer to bear. This includes the materials and labour, the infrastructure obligations that are triggered and the financial costs of borrowing. Construction rates may also be impacted by macro-economic factors (e.g. economic growth, costs of borrowing etc) and localised market factors (e.g. availability of labour).

Average build-out rates by size

- 4.3. Figure 4.1 indicates that across all sites analysed in this study, an average of 52 dwellings were built each year (i.e. 1 dwelling a week). Within this, the build-out rates observed increased as the site size increased, from 51 dwellings per annum for sites of 100-199 dwellings to 66 dwellings per annum for sites of 300-399 dwellings.

Figure 4.1

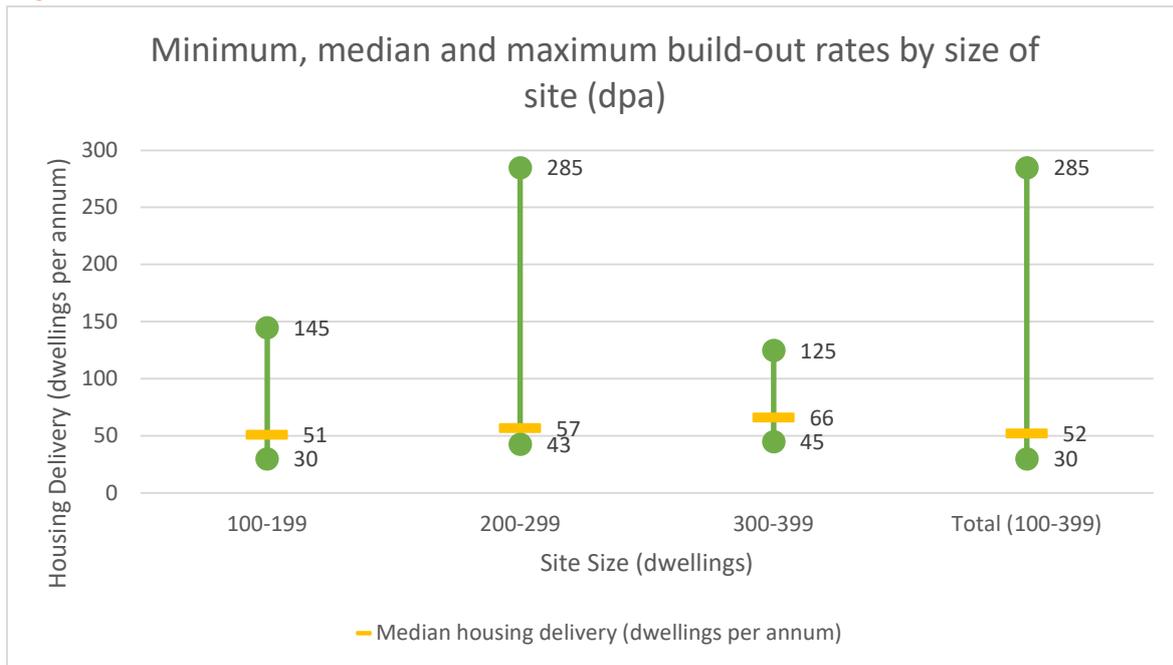


- 4.4. Further analysis shows that even when some schemes were able to achieve very high annual build-out rates in a particular year this rate of delivery was not always sustained. As shown in Figure 4.2 below, the highest rates of average completions were observed in the 200-299 dwelling range (the top five annual figures were between 170-285 dwellings per annum and all within the 200-299 site size). The highest recorded completion in any one year was 285

dwelling on a site which had gained prior approval for conversion to residential use from an office block (as detailed in Paragraph 2.2 of this report). In such instances, formal completions are usually only recorded in a single year, albeit recognising that some units may have been fitted out in previous years but unable to be occupied.

- 4.5. The lowest observed build-out rates were observed in the 100-199 dwelling range, with sites of 200 dwellings or more delivering a notably higher number of dwellings as a minimum per year.

Figure 4.2



Length of time to complete site

- 4.6. Table 4.3 demonstrates the typical length of time for sites to be completed according to the site size. It indicates that based on the sites observed, it takes 3.1 years for a site to be completed from the first dwelling constructed on sites of 100-199 dwellings in size. Interestingly, there is very little difference between the length of time for sites delivering 200-299 dwellings and 300-399 dwellings to be completed.

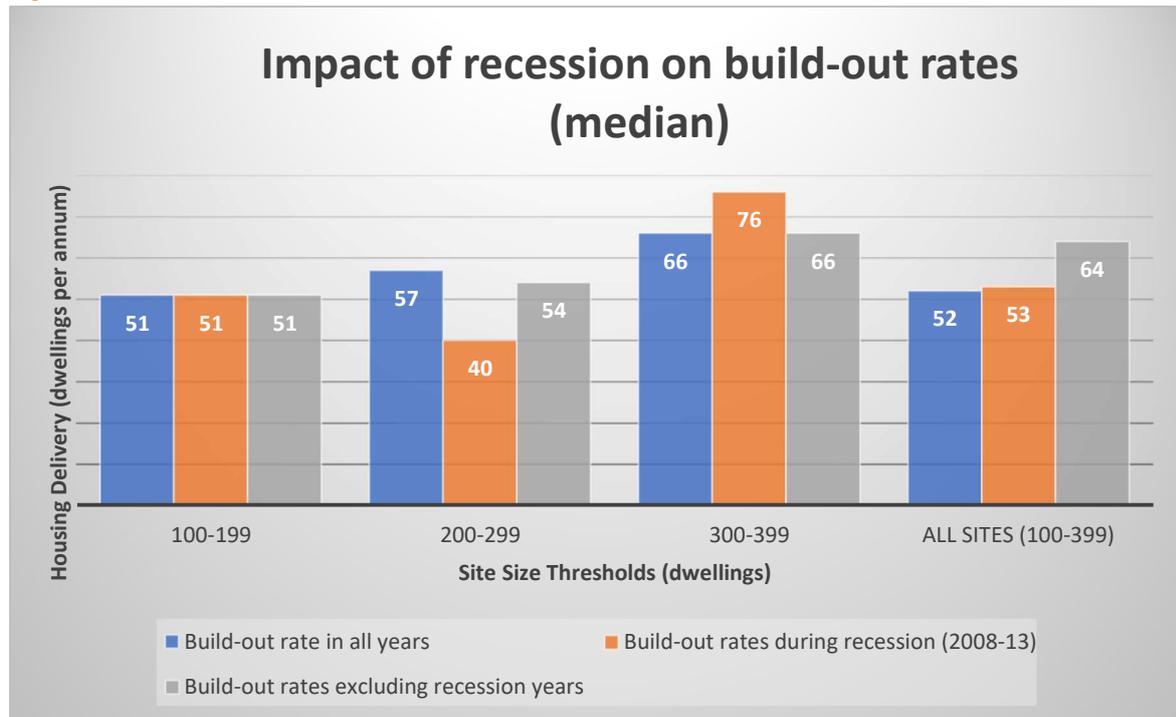
Table 4.3

Site Size	Time to complete (years)
All	3.3
100-199	3.1
200-299	4.1
300-399	4.3

The impact of the 2008 recession on build-out rates

4.7. Figure 4.4 provides an overview of the analysis undertaken to inform an understanding of the impact of market conditions on the build-out rate of sites.

Figure 4.4



4.8. In general terms, the 2008-13 period had a minimal impact on housebuilding in Hampshire on sites delivering between 100-399 dwellings. There was actually a slight increase in the average build-out rate in 2008-13 compared to the overall average build-out rates across all sites in the period 2000-20. The main reduction was on sites delivering 200-299 dwellings, where average build out rates decreased by 26% compared to the average build-out rates in the non-recession years. Smaller site delivery (100-199 dwellings) remained constant whilst the average build-out rates of sites of 300-399 dwellings increased.

4.9. For information, the number of sites in each of these categories (time and size) is set out in Table 4.5 below.

Table 4.5

Site Size	Build-out rates in all years		Build-out rates during recession (2008-13)		Build-out rates excluding recession years	
	Average Rate	Sample Size	Average Rate	Sample Size	Average Rate	Sample Size
100-199	51	62	51	30	51	32
200-299	57	17	40	7	54	10
300-399	66	7	76	5	66	2
All Sites	52	86	53	42	64	52

Summary of key findings

- i. Average completion rate of 52 dwellings per annum (1 dwelling per week) across all sites
- ii. Minimum delivery rates observed were notably higher on sites of 200 or more dwellings, with very little difference in how long sites of this scale take to build out when comparing sites delivering 200-299 dwellings and 300-399 dwellings
- iii. The 2008-2013 period saw very little changes in trends of build-out rates, indicating that sites delivering 100-399 dwellings were generally resilient to recessionary pressures during this time.

5. Comparison with national trends

Planning approval and lead-in times

- 5.1. The Lichfields Study is unclear as to whether the data presented on planning approvals and lead-in times is based on median averages or mean averages. For the purposes of this comparison, it is assumed that the figures presented are a median average.
- 5.2. The Lichfields Study suggested that on sites delivering 100-499 across the country, the average planning approval period was 2.1 years. This is 1 year longer than the trends observed on comparable sites in Hampshire during the period 2000-2020.
- 5.3. Lichfields calculated lead-in times to be 1.9 years across sites of 100-499 dwellings, whilst in Hampshire this was observed to be 1.4 years.
- 5.4. In total therefore, and based solely on the findings of the Lichfields Study, it takes an average of 1.5 years longer to secure permission and begin constructing dwellings on sites nationally compared to the trends observed in Hampshire in this study. Some caution needs to be applied to this comparison given the potential of sites in the Lichfields Study of 400-499 (outside of scope of this report) to contribute to these increased times.

Build-out rates

- 5.5. At a national level, sites of 100-499 dwellings were observed to complete an average of 54 dwellings per annum, a marginal increase over the 52 dwellings per annum observed on sites of 100-399 dwellings across Hampshire.

6. Further analysis of trends observed within components of supply

6.1. A significant amount of further analysis⁵ has also been undertaken to consider different components of housing supply.

Brownfield vs greenfield

6.2. In summary, the following observations are made on housing delivery trends on greenfield and brownfield sites:

- **Pre-commencement**
 - Brownfield sites proceed quicker through the planning approval process than greenfield sites (1 year vs 1.4 year) but take slightly longer to deliver the first dwellings (1.5 years for brownfield sites vs 1.4 years for greenfield sites).
 - The time taken for brownfield sites to gain planning approval has progressively got quicker since 2000, unlike greenfield sites where there is no such clear trend
- **Build-out rates**
 - 67.5% of completions were on brownfield sites with the highest proportion on sites of 100-199 dwellings (81.2%) and the lowest proportion on sites of 300-399 dwellings (44.3%)
 - Brownfield sites also achieved a higher annual build-out rate than greenfield sites (55 dwellings per annum (dpa) for brownfield and 52 dpa for greenfield), with the most significant difference being on sites delivering 300-399 dwellings (89 dwellings dpa on brownfield sites compared to 57 dwellings dpa for greenfield sites)
 - The 2008-13 period saw no notable changes in build-out rates between greenfield and brownfield sites across different site sizes.

Open market housing vs affordable housing

6.3. The summary of observations made on the impact of tenure on the delivery of housing are set out below:

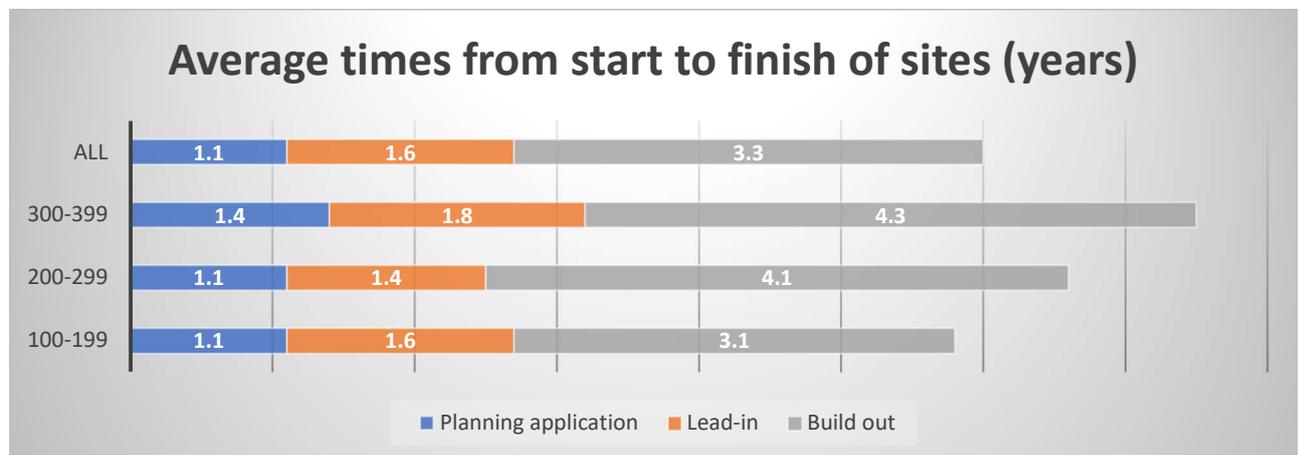
- **Pre-commencement**
 - The time taken to deliver the first dwelling after detailed planning consent has been granted is slightly longer for affordable housing (1.6 years) compared to private market housing (1.5 years).
- **Build-out rates**
 - Affordable dwellings were delivered as a 34.9% proportion of the total number of dwellings across sites of 100-399 dwellings.
 - Private build-out rates were higher (33 dpa across all site sizes) than the affordable housing component (27 dpa). As the number of dwellings to be delivered increases, the private market housing delivery rate increases at a greater rate (from 32 dpa for 100-199 dwellings to 45 dpa for 300-399 dwellings) than the affordable housing component (from 27 dpa for 100-199 dwellings to 34 dpa for 300-399 dwellings)
 - The 2008-13 period saw the rate of private housing delivery fall by 6% (2 dwellings per annum). The biggest fall is seen in the 200-299 site category

⁵ Further details of this analysis is available on request from Hampshire County Council's Land Supply Team

with a 43% reduction. Over the same period, affordable housing delivery increased by 38%, with an average of 12 additional dwellings delivered per annum.

7. Key conclusions

- The total length of time for a site to come forward was an average of 5.8 years from the registration of the first planning application by the local planning authority to the completion of the development. This increased to 7.5 years for the largest sites (300-399 dwellings).



- Planning approval process**
 - It takes an average of 1.1 years for the necessary detailed planning approval to be secured from the time that the original application (which could be an outline) is registered by the local planning authority. This has remained relatively constant between 2000 and 2020.
 - Generally, the length of time taken to approve larger sites during this time period has reduced, whilst the length of time to approve sites of 100-199 dwellings has increased in recent years.
- Lead-in period**
 - Across all the sites, the average lead-in period for the first dwelling to be completed after permission was granted was 1.6 years. Trends observed suggests that the lead-in time reduced from 1.7 years in the period 2000-2008 to 1.1 years in the period 2013-2020.
 - The reduction in lead-in times appears to be consistent across all site sizes, albeit with a pause in the trend for sites delivering 100-199 dwellings in the 2008-2013 period.
- Build-out rates**
 - Across all sites there is an average build-out rate of 52 dwellings per annum (1 dwelling per week).
 - Minimum delivery rates observed were notably higher on sites of 200 or more dwellings, with very little difference between sites of 200-299 dwellings and 300-399 dwellings in terms of how long they take to build out
 - All sites between 100-399 dwellings were generally resilient to recessionary pressures during the period 2008-2013.
- Type of site**
 - Brownfield sites were quicker to gain detailed planning approval than greenfield sites but then take slightly longer for the first dwelling on site to be completed.

Once development commenced, brownfield sites built out at a faster rate than greenfield sites.

- **Tenure mix**
 - There was very little difference in the average time taken to deliver the first open market dwelling and the first affordable dwelling following the granting of detailed planning consent (1.5 years for private market housing vs 1.6 years for affordable housing). The build-out rates of private housing was generally faster than affordable housing, yet during the 2008-13 period the delivery rates of private housing reduced notably (13%), while the affordable housing completions increasing during the same period (38%)

Appendix 1 - Location of residential sites analysed

Location of sites of 100-399 dwellings in Hampshire



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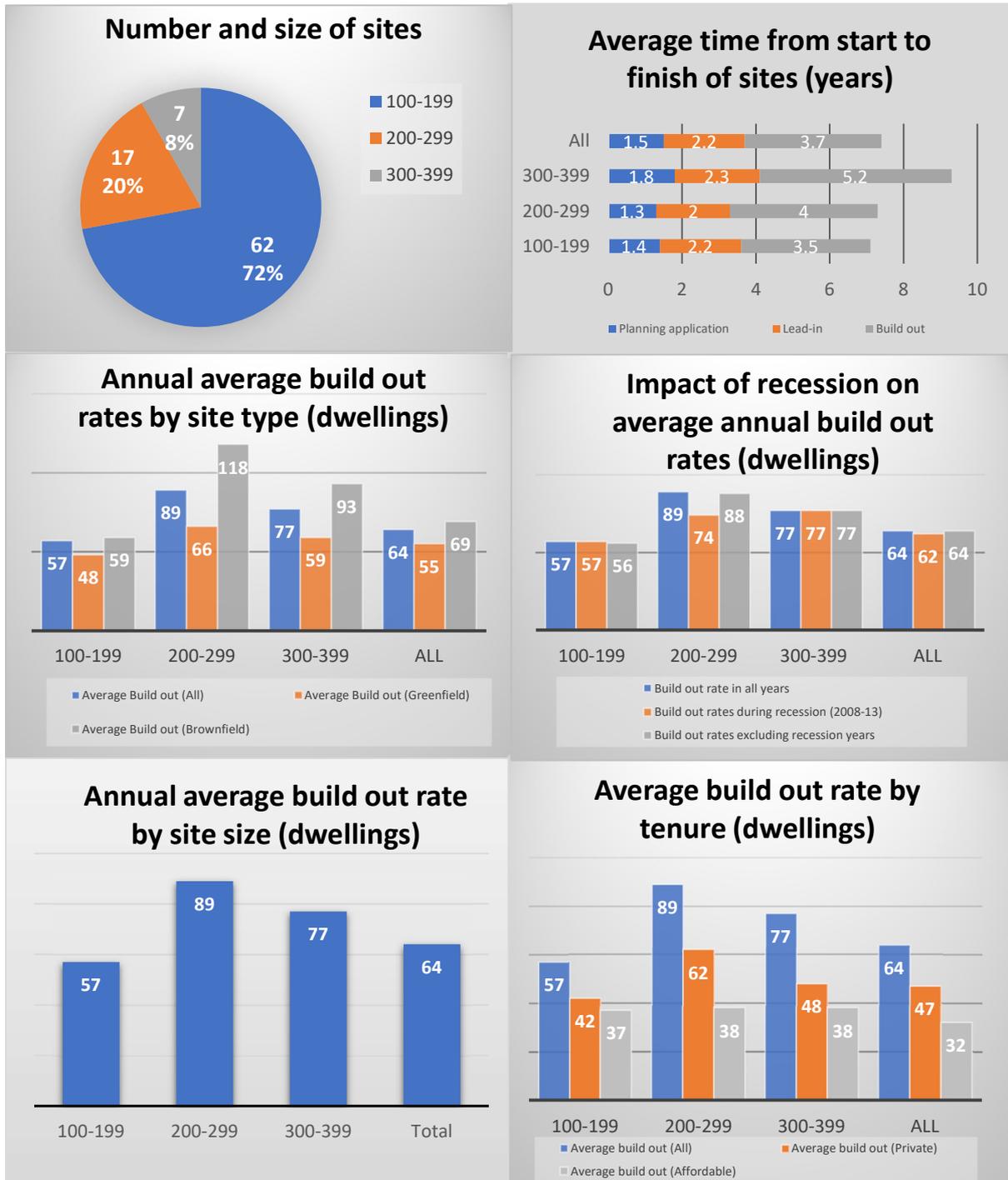
Appendix 2 –Residential sites analysed

LPA	HCC SITE ID	ADDRESS	STREET	TOWN	SUMMARY OF SCHEME
BASINGSTOKE AND DEANE	0340	LAND AT	OLD KEMPSHOTT LANE	BASINGSTOKE	RESIDENTIAL DEVELOPMENT - 303 DWELLINGS
BASINGSTOKE AND DEANE	0394	FORMER ALLOTMENT SITE	CHURCHILL WAY WEST	BASINGSTOKE	RESIDENTIAL DEVELOPMENT - 291 DWELLINGS
BASINGSTOKE AND DEANE	0406	ALDERMASTON JUNCTION	PRIESTLEY ROAD	BASINGSTOKE	ERECTION OF 162 DWELLING UNITS (INCL. 100 AFFORDABLE)
BASINGSTOKE AND DEANE	0429	LAND AT	ASH ROAD, BEECH ROAD, LINDEN ROAD	NEWBURY	REDEVELOP WITH 148 DWELLINGS
BASINGSTOKE AND DEANE	0436	ALENCON HOUSE	ALENCON LINK	BASINGSTOKE	CONVERSION & EXTENSION OF EXISTING OFFICES TO FORM 375 FLATS
BASINGSTOKE AND DEANE	0441	SKIPPETTS HOUSE	SKIPPETTS LANE WEST	BASINGSTOKE	ERECTION OF 162 DWELLINGS
BASINGSTOKE AND DEANE	0464	BEECH DOWN PRE SCHOOL	GERSHWIN ROAD	BASINGSTOKE	ERECT 66 DWELLINGS AND 64 EXTRA CARE AFFORDABLE UNITS
BASINGSTOKE AND DEANE	0465	REGENERATION SCHEME	FAROE/MALDIVE CLOSE	BASINGSTOKE	REDEVELOP SITE WITH 242 AFFORDABLE DWELLINGS
BASINGSTOKE AND DEANE	0476	FREEMANTLE CLOSE, TAVERNER CLOSE	WESTRAY CLOSE AND SILVESTER CLOSE	BASINGSTOKE	REDEVELOP SITE WITH 190 DWELLINGS
BASINGSTOKE AND DEANE	0499	OVERTON HILL	LONDON ROAD	OVERTON	RESIDENTIAL DEVELOPMENT FOR 120 DWELLINGS
BASINGSTOKE AND DEANE	0516	CHURCHILL PLAZA	CHURCHILL WAY	BASINGSTOKE	PRIOR APPROVAL - FOR 285 DWELLINGS
BASINGSTOKE AND DEANE	0517	LAND BETWEEN WINCHESTER ROAD &	MICHELDEVER ROAD	WHITCHURCH	RESIDENTIAL DEVELOPMENT FOR 100 DWELLINGS
BASINGSTOKE AND DEANE	0364 A AND B	SITE AT	OAKRIDGE ROAD	BASINGSTOKE	REDEVELOP WITH 299 DWELLINGS
EAST HAMPSHIRE	0238	LAND AT	CHASE ROAD	BORDON	RESIDENTIAL DEVELOPMENT - 207 DWELLINGS (INC. 60 AFFORDABLE)
EAST HAMPSHIRE	0260	CHANDOS LODGE AND GRANGE HOTEL	ANSTEY ROAD	ALTON	RESIDENTIAL DEVELOPMENT - 177 DWELLINGS
EAST HAMPSHIRE	0261	LAND SOUTH OF	WINCHESTER ROAD	ALTON	RESIDENTIAL DEVELOPMENT - 179 DWELLINGS
EAST HAMPSHIRE	0265	SILENT GARDEN	PORTSMOUTH ROAD	LIPHOOK	RESIDENTIAL DEVELOPMENT - 128 DWELLINGS
EAST HAMPSHIRE	0325	KING GEORGES HOSPITAL	HEWSHOTT LANE	LIPHOOK	RETIREMENT VILLAGE OF 103 FLATS, 47 COTTAGES & 1 WARDEN FLAT
EAST HAMPSHIRE	0338	LAND AT	BOROUGH ROAD/GRANGE ROAD	PETERSFIELD	REDEVELOP WITH 148 DWELLINGS
EAST HAMPSHIRE	0341	NORTH OF	BRISLANDS LANE	FOUR MARKS	RESIDENTIAL DEVELOPMENT - 110 DWELLINGS
EAST HAMPSHIRE	0388	8	LONDON ROAD	WATERLOOVILLE	ERECTION OF 106 DWELLINGS
EAST HAMPSHIRE	0395	LYMINGTON FARM INDUSTRIAL ESTATE	LYMINGTON BOTTOM ROAD	ALTON	ERECTION OF 107 DWELLINGS
EAST HAMPSHIRE	0414	LAND SOUTH OF	CHALTON LANE	WATERLOOVILLE	ERECTION OF 207 DWELLINGS
EAST HAMPSHIRE	0241A	RAMSHILL	RAMSHILL	PETERSFIELD	RESIDENTIAL DEVELOPMENT - 298 DWELLINGS
EASTLEIGH	0263	68-96	TWYFORD ROAD	EASTLEIGH	REDEVELOP SITE WITH 161 FLATS IN 9 BLOCKS
EASTLEIGH	0272	KINGS COPSE PRIMARY SCHOOL	KINGS COPSE ROAD	HEDGE END	RESIDENTIAL DEVELOPMENT OF 119 DWELLINGS
EASTLEIGH	0274	37-43	BOURNEMOUTH ROAD	EASTLEIGH	REDEVELOPMENT OF SITE TO PROVIDE 150 DWELLINGS
EASTLEIGH	0295	TRAVIS PERKINS	MILL STREET	EASTLEIGH	REDEVELOP SITE WITH 113 DWELLINGS
EASTLEIGH	0296	VELMORE ESTATE		EASTLEIGH	REDEVELOP WITH 189 DWELLINGS
EASTLEIGH	0308	THE MONKSBROOK ESTATE	CHERITON ROAD	EASTLEIGH	REDEVELOP SITE WITH 237 DWELLINGS
EASTLEIGH	0320	LAND AT	HAMBLE LANE	BURLEDON	RESIDENTIAL DEVELOPMENT FOR 150 DWELLINGS
EASTLEIGH	0326	LAND OFF	WINCHESTER ROAD	FAIR OAK	RESIDENTIAL DEVELOPMENT OF UP TO 330 DWELLINGS
EASTLEIGH	0342	MOORGREEN HOSPITAL	BOTLEY ROAD	WEST END	REDEVELOP SITE WITH 121 DWELLINGS
EASTLEIGH	0213A AND B	FORMER CAUSTON SITE	BROOKWOOD AVENUE	EASTLEIGH	RESIDENTIAL DEVELOPMENT - 189 DWELLINGS
EASTLEIGH	0215A AND B	BOTLEIGH GRANGE	LOCKE ROAD	SOUTHAMPTON	RESIDENTIAL DEVELOPMENT - 164 DWELLINGS
EASTLEIGH	0218 A AND B	THE GARDEN ESTATE AND 229-245	DESBOROUGH ROAD	EASTLEIGH	DEMOLISH EXIST, ERECT 120 AFFORDABLE DWELLINGS AND OFFICE
FAREHAM	0171	LAND AT	PETERS ROAD	LOCKS HEATH	RESIDENTIAL DEVELOPMENT - 287 DWELLINGS
FAREHAM	0250	125-139	GUDGE HEATH LANE	FAREHAM	ERECTION OF 115 DWELLINGS
FAREHAM	0283	COLDEAST HOSPITAL		FAREHAM	RESIDENTIAL DEVELOPMENT - 206 DWELLINGS
FAREHAM	0284	FAREHAM COLLEGE	BISHOPSFIELD ROAD	FAREHAM	RESIDENTIAL DEVELOPMENT - 120 DWELLINGS
GOSPORT	0127	ST GEORGES BARRACKS SOUTH	MUMBY ROAD	GOSPORT	RESIDENTIAL DEVELOPMENT - 215 DWELLINGS
GOSPORT	0150	PRIDDYS HARD	HERITAGE WAY	GOSPORT	MIXED USE INCLUDING 198 RESIDENTIAL UNITS
HART	0161	DILLY LANE		HOOK	RESIDENTIAL DEVELOPMENT - 332 DWELLINGS
HART	0167	LAND WEST OF	HITCHES LANE	FLEET	RESIDENTIAL DEVELOPMENT - 357 DWELLINGS
HART	0221	LAND SOUTH OF BLACKWATER RIVER	SANDHURST ROAD	YATELEY	ERECTION OF 119 EXTRA/CLOSE CARE UNITS

Appendix 2 –Residential sites analysed

LPA	HCC SITE ID	ADDRESS	STREET	TOWN	SUMMARY OF SCHEME
HART	0237	GUILLEMONT PARK	MINLEY ROAD	CAMBERLEY	RESIDENTIAL DEVELOPMENT OF 102 DWELLINGS
HAVANT	0187	354	LONDON ROAD	WATERLOOVILLE	RESIDENTIAL REDEVELOPMENT/CONVERSION - 105 DWELLINGS
HAVANT	0200	LAND NORTH OF	GOLDRING CLOSE	HAYLING ISLAND	RESIDENTIAL DEVELOPMENT - 131 DWELLINGS
HAVANT	0230	NORTH & SOUTH OF	RANELAGH ROAD	BEDHAMPTON	RESIDENTIAL DEVELOPMENT - 113 DWELLINGS
HAVANT	0231	PURBROOK PARK SCHOOL PLAYING FIELD	STAKES ROAD	PURBROOK	RESIDENTIAL DEVELOPMENT - 102 DWELLINGS
HAVANT	0236	HAMPSHIRE FARM	REDLANDS LANE	EMSWORTH	RESIDENTIAL DEVELOPMENT - 248 DWELLINGS
HAVANT	0247	RAMSDALE PLAYING FIELDS	WOOLSTON ROAD	HAVANT	RESIDENTIAL DEVELOPMENT OF 135 DWLS
HAVANT	0285	MANOR FARM AND COPSEYS NURSERY	HALLETT ROAD	HAVANT	ERECTION OF 200 DWELLINGS
HAVANT	0291	WEST OF HORNDEAN ROAD	HORNDEAN ROAD	HAVANT	RESIDENTIAL DEVELOPMENT - 125 DWELLINGS
NEW FOREST	0261	RIVERSIDE SITE	BRIDGE ROAD	LYMINGTON	REDEVELOP WITH MIXED USES INCLUDING 168 DWELLINGS
NEW FOREST	0339	TOTTON SPORTS CLUB	SOUTHERN GARDENS	TOTTON	ERECTION OF 102 DWELLINGS
NEW FOREST	0380	MERRYFIELD PARK	DERRITT LANE	SOPLEY	RESIDENTIAL DEVELOPMENT - 102 DWELLINGS
PORTSMOUTH	0359	FORMER JOHN POUNDS CENTRE	ST.JAMES' STREET	PORTSMOUTH	REDEVELOP FOR MIXED USES INCLUDING 122 DWELLINGS
PORTSMOUTH	0384	UNIVERSITY BUSINESS SCHOOL	MILTON ROAD	PORTSMOUTH	REDEVELOPMENT FOR MIXED USES INCLUDING 154 DWELLINGS
PORTSMOUTH	0385	ST.MARYS HOSPITAL WEST WING	MILTON ROAD	PORTSMOUTH	REDEVELOPMENT FOR MIXED USES INCLUDING 191 DWELLINGS
PORTSMOUTH	0489	PHASE 4	FRATTON WAY/GOLDSMITH AVENUE	PORTSMOUTH	MIXED USE DEVELOPMENT INCLUDING 198 FLATS IN 3 BLOCKS
PORTSMOUTH	0500	128	MILTON ROAD	PORTSMOUTH	REDEVELOP WITH 76 SHELTERED FLATS 22 FLATS AND 4 HOUSES
PORTSMOUTH	0502	HIGHBURY COLLEGE	DOVERCOURT ROAD	PORTSMOUTH	REDEVELOP WITH 165 DWELLINGS
PORTSMOUTH	0546	SCOTTISH & SOUTHERN ENERGY DEPOT	LOWER DRAYTON LANE	PORTSMOUTH	REDEVELOPMENT FOR 143 DWELLINGS
RUSHMOOR	0198	84-177	GUILLEMONT FIELDS	FARNBOROUGH	REPLACE 94 DWELLINGS WITH 141 DWELLINGS (INC. 12 AFFORDABLE)
RUSHMOOR	0237	TELECOM HOUSE	ALEXANDRA ROAD	ALDRSHOT	REDEVELOP WITH 138 FLATS (INCL. 49 AFFORDABLE DWELLINGS)
RUSHMOOR	0252	250	FARNBOROUGH ROAD	FARNBOROUGH	REDEVELOP WITH 253 FLATS
RUSHMOOR	0285	THOMSON HOUSE, 296	FARNBOROUGH ROAD	FARNBOROUGH	CONVERT OFFICES TO 115 FLATS AND ERECT BLOCK OF 30 FLATS
RUSHMOOR	0169A AND B	MANOR PARK COLLEGE ANNEXE	CHURCH LANE EAST	ALDRSHOT	RESIDENTIAL DEVELOPMENT OF 124 DWELLINGS
SOUTHAMPTON	0531	LAND BETWEEN	ALBERT ROAD SOUTH/CANUTE ROAD	SOUTHAMPTON	REDEVELOP WITH 101 FLATS AND A1 & A3 USES
SOUTHAMPTON	0571	31-67	HILL LANE	SOUTHAMPTON	REDEVELOPMENT FOR 68 FLATS, 7 HOUSES & 45 MANAGED DWELLINGS
SOUTHAMPTON	0575	ANDERSONS ROAD/DEANERY ANNEXE SITE	CHAPEL ROAD	SOUTHAMPTON	REDEVELOP SITE WITH ESTIMATED 355 DWELLINGS
SOUTHAMPTON	0578	81-97	PORTSWOOD ROAD	SOUTHAMPTON	REDEVELOP WITH 90 FLATS AND 11 HOUSES
SOUTHAMPTON	0632	107-122	HIGH STREET	SOUTHAMPTON	REDEVELOP FOR MIXED USES INCLUDING 187 DWELLINGS
SOUTHAMPTON	0670	LAND AT	ALBERT ROAD NORTH	SOUTHAMPTON	ERECT 60 FLATS AND CONVERT COLLEGE ANNEXE TO 44 FLATS
SOUTHAMPTON	0678	CUSTOM HOUSE	BRITON STREET	SOUTHAMPTON	REDEVELOP SITE TO PROVIDE 281 FLATS IN 2 PHASES
SOUTHAMPTON	0725	70-75	HIGH STREET	SOUTHAMPTON	CONVERSION OF BUILDING INTO 128 FLATS
SOUTHAMPTON	0766	THE GANTRY	BLECHYNDEN TERRACE	SOUTHAMPTON	REDEVELOP WITH OFFICES AND 115 AFFORDABLE FLATS
SOUTHAMPTON	0768	LAND AT	MARITIME WALK	SOUTHAMPTON	MIXED USE DEVELOPMENT INCLUDING 130 DWELLINGS
SOUTHAMPTON	0773	PARK CENTRALE	THE AVENUE	SOUTHAMPTON	RESIDENTIAL DEVELOPMENT - 321 DWELLINGS
SOUTHAMPTON	0796	FORMER DEANERY SPORTS HALL	CHAPEL ROAD	SOUTHAMPTON	REDEVELOP WITH 146 FLATS AND 29 HOUSES
SOUTHAMPTON	0829	HINKLER PARADE	HINKLER RD & TATWIN CRESCENT	SOUTHAMPTON	REDEVELOP WITH 109 DWELLINGS
SOUTHAMPTON	0856	LAND AT	EXFORD AVENUE	SOUTHAMPTON	REDEVELOP SITE WITH 127 DWELLINGS
SOUTHAMPTON	0416C	FRUIT AND VEG MARKET	BRITON STREET/BERNARD STREET	SOUTHAMPTON	RESIDENTIAL DEVELOPMENT - 279 DWELLINGS
TEST VALLEY	0160	BORDENS/AEP SITE	ROWNHAMS ROAD	SOUTHAMPTON	RESIDENTIAL DEVELOPMENT - 227 DWELLINGS
TEST VALLEY	0197	GROVE PLACE	UPTON LANE	SOUTHAMPTON	CONVERT & REDEVELOP TO CREATE 115 RETIREMENT DWELLINGS

KEY FINDINGS AT A GLANCE



Notes:

- i) the average trends presented above are based on mean averages
- ii) the lower build out rates by split of tenure reflect many sites delivering both private and affordable housing

Appendix 3 – Analysis of key trends using mean average

1. Introduction

- 1.1. This appendix looks to analyse the previously observed trends by focusing on the mean averages rather the median, to provide a different context to the data collected on sites delivering 100-399 dwellings during the years 2000 to 2020.

2. Methodology

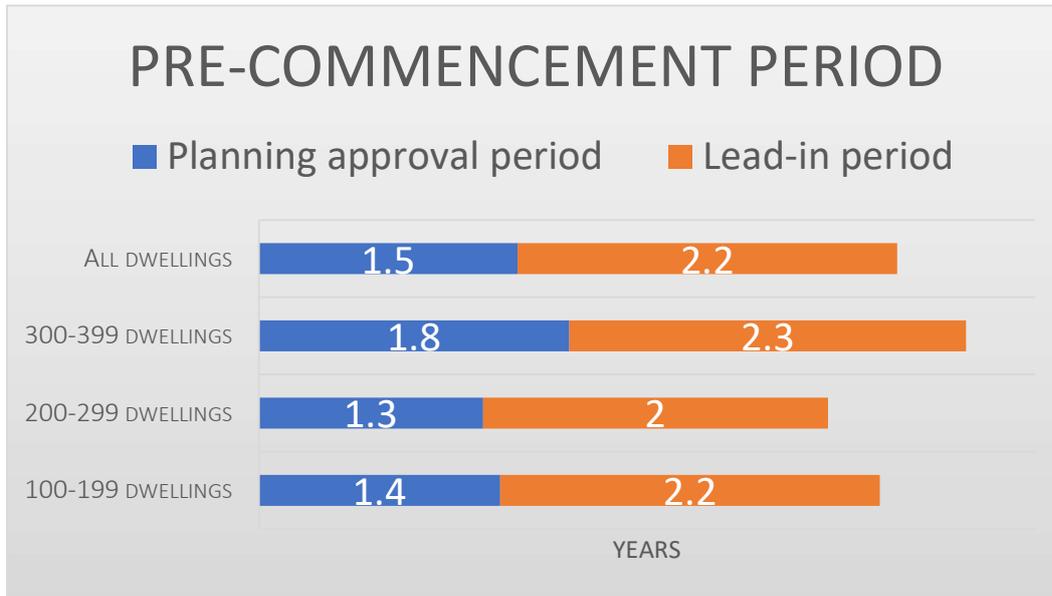
- 2.1. Apart from the base of the analysis now being represented by the mean averages, the methodology of this appendix is unchanged from that of the main report.

3. Planning approval & lead-in times

Time taken

- 3.1. Figure 3.2 below indicates that 1.5 years was the mean average it took for planning approval to be granted. Once permission was granted, the lead-in time before the first dwelling was completed took 2.2 years on average.
- 3.2. Therefore, across all sites, it took a mean average of 3.7 years from first registration of a planning application with the local planning authority to the first dwelling being completed on site. Interestingly, this is almost a whole year longer than that shown in the median figures, which was 2.7 years when the approval period and lead in times were combined.
- 3.3. Figure 3.2 also provides a breakdown of the variations across site sizes. It demonstrates that across all site sizes using the mean planning approval period the time taken is shown to be longer than the equivalent planning approval period using median data. The largest difference being sites of 300-399 dwellings in size took at least 0.4 years longer using mean figures as compared to median.
- 3.4. In terms of the lead-in time period, Figure 3.2 also shows that there was a similar increase across all site sizes when mean figures were used compared to median figures. The largest difference this time though was within the 100-199 and 200-299 ranges, where the mean figures were 0.6 years longer than the median figures.

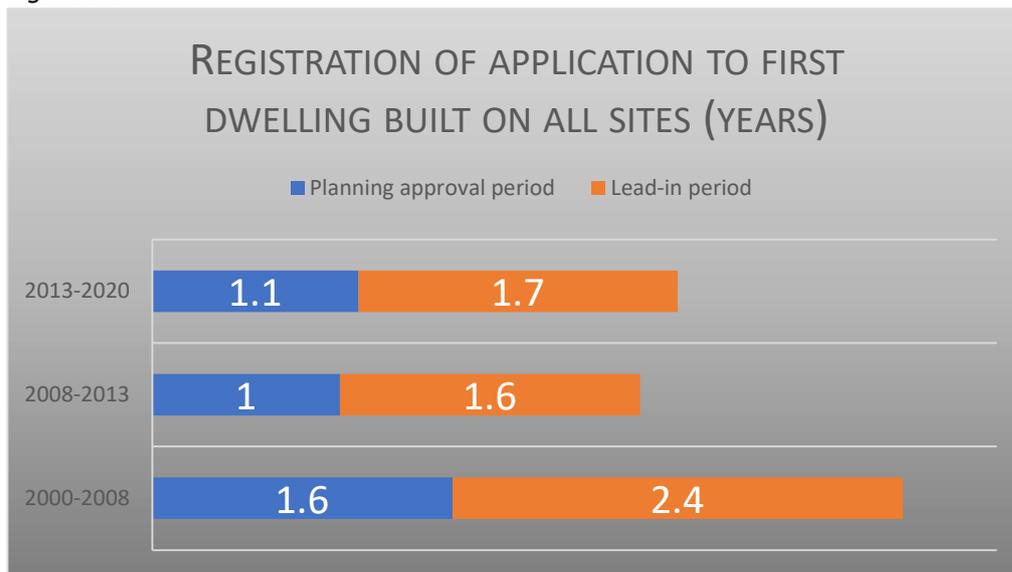
Figure 3.2



Difference in time taken across time periods

3.5 It is also possible to consider how the planning approval period and lead-in period varies over time and across the different site sizes. As shown in Figure 3.3 below, using mean figures rather than median figures made no discernible difference to the planning approval period for years 2008-13 and 2013-20. However, there was a notable difference for the 2000-08 period where the planning lead period was 0.5 years longer using the mean figure. The lead-in figures however notably increased for the 2000-08 and 2013-20 using the mean figure, although a slight decrease was shown in the 2008-13 period.

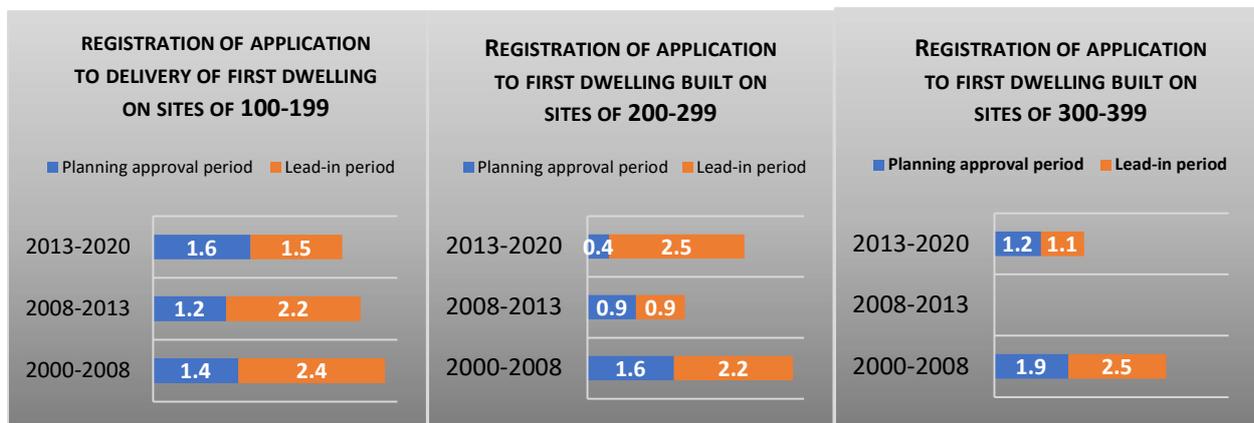
Figure 3.3



Appendix 3 – Analysis of key trends using mean average

3.6 Across the period observed, there has been a general trend towards a reduction in the length of time taken by local planning authorities to determine planning applications for sites of 200 or more dwellings, compared with an increase in the length of time taken to determine sites of 100-199 dwellings in size, as shown in Figure 3.4. This trend correlates with the median figures in the main report, albeit, the mean figures are generally slightly higher in each period.

3.7 When considering the subsequent lead-in time to commencement across the period observed, there was also a general trend towards a reduction in the time taken for developers to complete the first dwelling across all sites (albeit this was not the case for sites of 200-299 in the 2013-20 period, where there was a significant increase of 1.6 years). This follows a similar pattern to the median figures, notwithstanding that the mean figures are again slightly higher than the median figures.



Summary of key findings

Planning approval process:

3.8 Across all sites it took an average of 1.5 years for a planning application to go from being registered to being granted approval from the local planning authority. This time had reduced from 1.6 years in the early noughties but has since stayed consistent from 2008 onwards. When comparing to the median figures on the main document, they see less change through the years in this area, with the approval period being 1.1 years from 2000-2008 and 1 year in the 2008-2013 range.

3.9 The size of the site makes a difference towards the planning approval period when the number of homes being proposed exceeds 300, as the approval period increased by 0.5 and 0.4 years from the 200-299 and 100-199 dwelling sized applications.

Lead-in Period:

3.10 During the period 2000-2008, the time it took for the first dwelling to be built from when planning permission was given was 2.4 years, which is considerably longer compared to the subsequent years. However, when looking at this figure across the different sized sites it hardly fluctuates with the figures only differing by a maximum of 0.3 years. In fact, there is a greater

Appendix 3 – Analysis of key trends using mean average

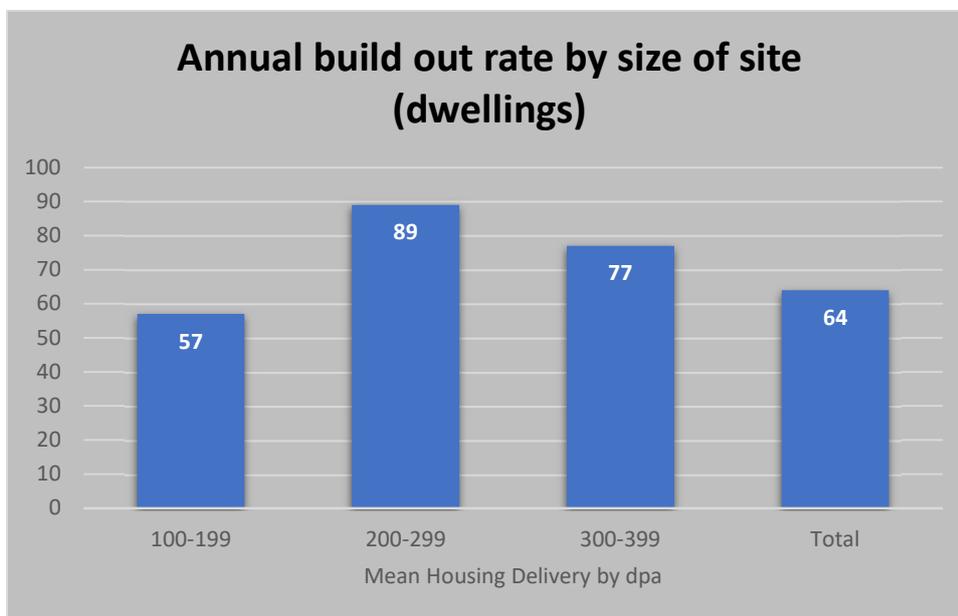
change amongst the median lead-in figures, as this value increases from 1.4 years at 200-299 sized sites to 1.8 years at sites with 300-399 dwellings.

4. How quickly do sites build-out?

Average build-out rates by size

- 4.1. Figure 4.1 indicates that across all sites which have been analysed, a mean average of 64 dwellings were constructed each year. This is an increase from the median figure of 52 dwellings across all sites. Looking further at the mean figures, the average build out rate peaked at 89 per annum on sites of 200-299 dwellings in size, significantly higher than the 57 dwellings per annum observed for sites of 100-199 dwellings in size.

Figure 4.1



- 4.2. Further analysis in Figure 4.2 shows that even when some schemes were able to achieve very high annual build-out rates in a particular year this rate of delivery was not always sustained. The mean build out rate figures for all site sizes were higher than the median figures. Nevertheless, the biggest difference between the mean and median build out rate figures are to be seen within the 200-299 site size, where the mean figure was 89 compared to a median figure of only 57.
- 4.3. The lowest observed build-out rates were observed in the 100-199 dwelling range, with sites of 200 dwellings or more delivering a notably higher number of dwellings as a minimum per year.

Figure 4.2



Length of time to complete site

4.4. Table 4.3 demonstrates the typical length of time for sites to be completed according to the site size. It indicates that based on the sites observed, it takes 3.5 years for a site to be completed from the first dwelling constructed on sites of 100-199 dwellings in size. Interestingly, the mean figure for sites sized between 200-299 is slightly lower (0.1 years) than the median figure, whereas all other site sizes show a significant increase in comparison to the median.

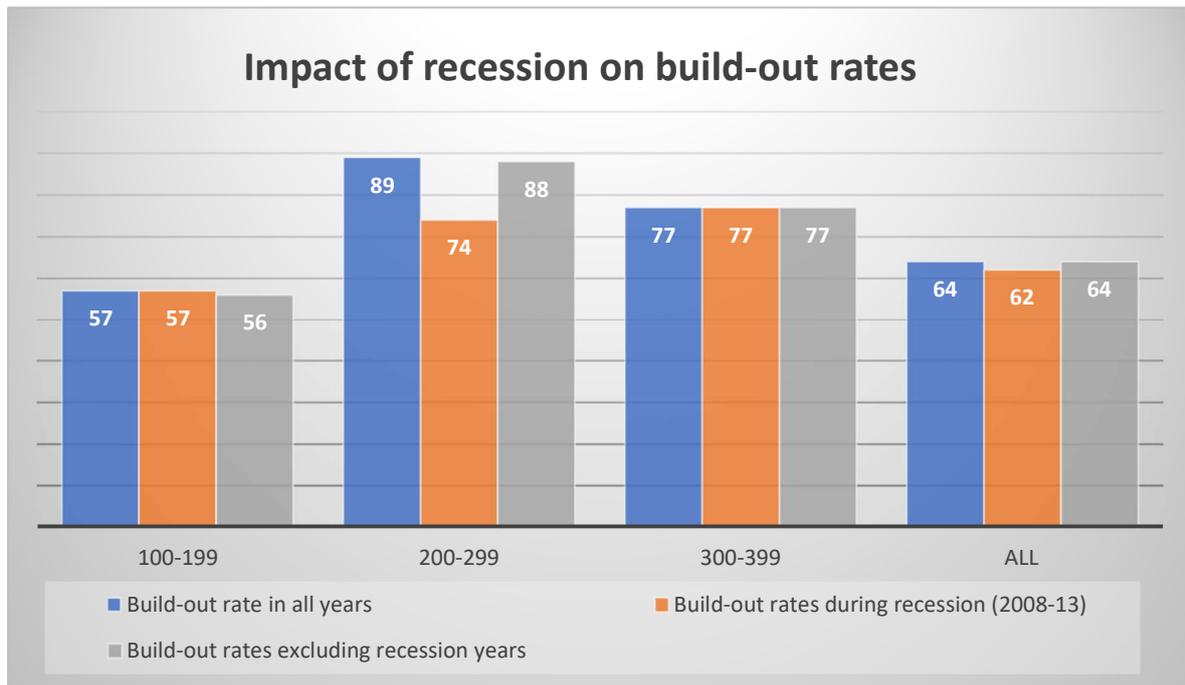
Table 4.3

Site Size	Time to complete (years)
All	4.2
100-199	3.5
200-299	4
300-399	5.2

The impact of the 2008 recession on build-out rates

4.5. Figure 4.4 provides an overview of the analysis undertaken to shed light on how the market affected the build-out rate of sites across Hampshire.

Figure 4.4



4.6. In parallel, to the median figures, the economic situation during the recession had almost no impact on the build out rates within Hampshire for sites consisting of 100-199 dwellings. The same can also be said for the sites of 300-399 dwellings, as the build out rate across the recession years and excluding the recessions was maintained at 77 per annum. Whereas, the median figures show the build out rate actually increased by 10 dwellings a year for sites with 300-399 dwellings during the recession years as opposed to outside of them (from 66 to 76 dwellings per annum).

4.7. Like the median figures, the only reduction in buildout rate during the recession years was for the sites with 200-299 dwellings. When compared to the 88 dwellings being built per annum outside of the recession years, this site range saw a decrease of 16% in 2008-2013 when the build out rate was 74.

4.8. Overall, when looking at the “all sites” aspect of this data there is very little change across the three variables with the 200-299 dwelling sites only building on average 2 less dwellings when compared to build out rates in all years and those excluding the recession years.

4.9. For information, the number of sites in each of these categories (time and size) is set out in Table 4.5 below.

Appendix 3 – Analysis of key trends using mean average

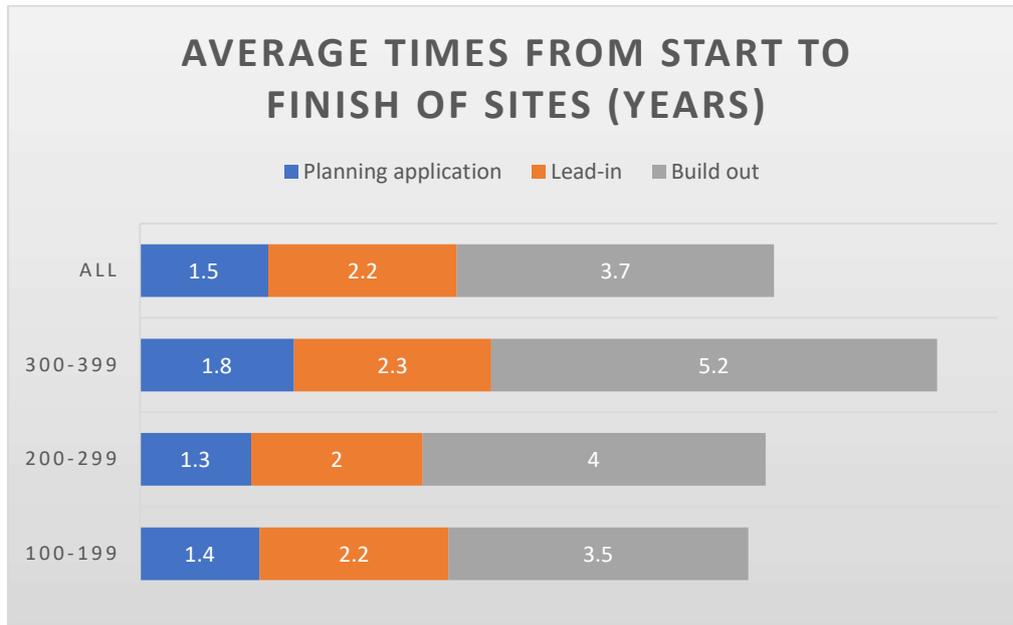
Table 4.5

Site Size	Build-out rates in all years		Build-out rates during recession (2008-13)		Build-out rates excluding recession years	
	Average Rate	Sample Size	Average Rate	Sample Size	Average Rate	Sample Size
100-199	57	62	57	30	56	32
200-299	89	17	74	7	88	10
300-399	77	7	77	5	77	2
All Sites	64	86	62	42	64	52

Summary of key findings

- Average building out rate of 64 dwellings per annum across all sites.
- The recession years of 2008-2013 only seemed to really affect the sites which consist of 200-299 dwellings as they saw a drop in build out rate of 16%.
- Sites of 300-399 dwellings saw no change in build out rate during 2008-2013, and the 100-199 dwelling sites only saw a decrease in 1 dwelling per annum in the years excluding the recession.

5. Key conclusions



- The total average mean length of time for a site to come forward across all site sizes was 7.4 years from the registration of the first planning application to the completion of development. This increased to 9.3 years for the largest sites of 300-399 dwellings. This is significantly higher than the median figures where the 300-399 dwelling sites showed an overall length of time to be at 7.5 years.
- **Planning approval process**
 - On average it takes an application 1.5 years from being registered to then being approved. This was consistent with only a 0.1 year difference between sites with 100-199 and 200-299 dwellings (1.4 and 1.3 years), but for the larger sites with 300-399 dwellings it took on average 1.8 years. The mean figures are slightly higher than the median figures for all site sizes, with the most significant increase being within the 300-399 dwellings (0.4 years).
 - The time it took for a large housing application to be approved fell significantly from 1.6 years in 2000-2008 to 1 year in 2008-13, and then increased slightly to 1.1 years for the 2013-2020 period. This largely corresponds to the median findings with the only variation occurring in the years covering 2000-2008 where the median figure was only 1.1 years.
- **Lead-in period**
 - Across the different site sizes being analysed, the lead in time for applications remained constant, staying around the 2 year mark (going to a maximum of 2.3 years for sites with 300-399 dwellings). The mean average figures are longer than the median figures across all sizes of sites, with the difference being most

Appendix 3 – Analysis of key trends using mean average

notable on sites of 100-299 where the mean was 0.6 years longer than the median figures.

- Like the planning approval process, the time it took for the first dwelling to be built after approval reduced after the 2000-2008 period, as it went from 2.4 years in that range to 1.6 in the years in 2008-2013. Albeit there was then an increase observed in the period 2013-20 for sites of 200-299 dwellings. The mean trends observed in this period differ more markedly than the median.
- **Build-out rates**
 - Across all sites there was a build out rate of 64 dwellings per annum when using a mean average, 12 higher than the median average.
 - Sites which feature between the 100-199 and 300-399 ranges were largely unaffected within the recession years of 2008-2013 when considering the mean average. When using the median figures, sites of 300-399 dwellings in size saw the average delivery increase by 10 dwellings per annum.
 - The maximum build out rate was witnessed within the 200-299 size category with 285 dwellings being completed per annum at one particular site.