States of Guernsey
Planning Service

Housing Monitoring Report

Fourth Quarter of 2016 (October-December)

For Information

Introduction
The primary purpose of the quarterly Housing Monitoring Report is to monitor whether a two year supply of housing is being maintained in accordance with Development Plan policies. In addition, other statistics are presented to provide a more in depth analysis of the source and spatial distribution of new dwellings and the take up of planning permissions.

This monitoring report refers to the net change in new dwellings. For example, a scheme to demolish one house and replace it with five flats is counted as +4 dwellings and a scheme to demolish a house and replace it with another house involves no net gain in dwellings and is counted as 0. A dwelling is defined as a self-contained unit of accommodation, i.e. where the dwelling is designed for the occupants to share the kitchen, bathrooms and living rooms. The monitoring does not include dwellings that are within the Use Classes that include sheltered accommodation or nursing homes or similar.

The Island Development Plan

The Island Development Plan was adopted on 2nd November 2016, this superseded both the Urban Area Plan (UAP) and the Rural Area Plan (RAP). This report therefore covers a period where the UAP & RAP were in force (from October to 1st November) and then the IDP came into force from the remainder of the period (2nd November to end of December). In relation to monitoring, the UAP and IDP both require close monitoring of the two year housing supply. For continuity and clarity, this report will follow the format of the previous reports of 2016. There will be a new format from Q1 2017 onwards to fully meet the new requirements of the IDP.

Approvals to date (running totals)

Planning policies require the Development & Planning Authority to ensure that a two-year housing supply is ‘effectively available for housing development’ at any one time. Given the current annual target of 300 additional new dwellings per year, this equates to 600 new dwellings.

Dwellings are deemed to be effectively available (in the pipeline) where planning permission has been granted but the development is not yet complete, and where the development of new housing is acceptable in principle. The figures below demonstrate the number of dwellings in the pipeline this quarter:

Full permits (work not commenced): 714 dwellings (509 urban / 205 rural)

Outline permissions: 319 dwellings (319 urban / 0 rural)

Under Construction: 382 (268 urban / 114 rural)

Effective Housing Supply: 1,415 additional dwellings (1,096 urban, 319 rural) are under construction or have some form of permission, representing an increase since the third quarter of 2016. The current housing supply represents a 77/23% split between the supply arising from urban and rural areas, respectively.

At the end of Q4, there are two extant outline planning permissions providing for 319 dwellings in total. These include a proposal for 303 dwellings at Leale’s Yard, Vale granted outline planning permission on 24th August 2016, which represents one of the largest developments in the last decade, and a proposal for 16 dwellings at Admiral Park, St Peter Port granted on 24th August 2016 [please note an outline permission was granted for 4 dwellings on the same site in September 2015. However the permission for 16 dwellings replaces the permission for 4 dwellings on the same site]

27% of the pipeline is under construction, which represents an increase when compared to 24% in the third quarter of 2016. Comparison with other jurisdictions in this respect is not always easy due to different ways in which data is collected and the frequency at which it is reported. However a number of other local authorities also monitor the percentage of their pipeline under construction and some of these figures are shown below. This indicates that our percentage figure is below average, when compared to other jurisdictions.

Jersey	January 2013	29%
Chiltern District Council	March 2015	48%
North Norfolk	March 2016	44%

Figure 1: Pipeline under construction

The Parishes

The status of new housing development in the pipeline in each parish is illustrated below. The figures represent a running total and not just the permissions granted during the quarter.

Parish	Dwellings upon which work has not yet started (a)	(b)	Units under construction (c)	**Total Units (a) + (c)** **"Pipeline figure"**
	All types incl. outline permissions	Permits alone (PMT+COU)		
St Peter Port	354	338	171	**525**
St Sampson's	65	65	51	**116**
Vale	434	131	77	**511**
Castel	35	35	32	**67**
St Martin's	75	75	34	**109**
St Saviour's	44	44	5	**49**
Forest	2	2	5	**7**
Torteval	8	8	0	**8**
St Andrew's	11	11	1	**12**
St Peter's	5	5	6	**11**
TOTAL	**1,033**	**714**	**382**	**1,415**

Figure 2: Planning permissions for new dwellings by Parish

Fourth Quarter Statistics 2016

Approvals this quarter

Full planning permission was granted for a total of 93 additional dwellings during the fourth quarter of 2016. This represents a split of 40 [43%] in the urban area and 53 [57%] in the rural area and is significantly lower than the third quarter of 2016 where 219 new dwellings were granted full permission. However, the average number of dwellings approved per quarter over the past 3 years is 95 units. Therefore this quarter's approvals are generally in line with the previous quarterly record. The an abnormally high number of approvals in Q3, believed to be due to a high volume of social housing applications being submitted prior to the adoption of the Island Development Plan (IDP) on 2nd November 2016. The largest permissions granted this quarter were for 17 dwellings at La Flaguee Vinery, Route Des Clos Landais, St Saviour and a residential development of 16 dwellings at La Vallee Vinery, La Route Des Coutures, St Martins was also given permission in quarter 4.

As can be seen from the Figure 3, the majority of approvals granted this quarter were for new builds in the rural area. There were no applications resulting in a loss of units.
The sources of dwellings arising from this quarter's full permissions are as follows:

	Urban area	Rural area	Total
New build	20	34	54
Re-development	17	10	27
Sub-division	0	4	4
Conversion	3	5	8
Loss of units	0	0	0
Total	40	53	93

Figure 3: Full planning permissions for new dwellings given this quarter by area and source

Brownfield / Greenfield development

The Development Plans only allow the development of greenfield sites in exceptional circumstances; therefore approvals on greenfield sites are closely monitored.

33 dwellings were permitted on greenfield sites this quarter involving two applications by the Guernsey Housing Association for social housing at two different sites. The first proposal comprised 17 dwellings approved at La Flaguee Vinery, Route Des Clos Landais, St Saviour, and the second proposal was for 16 dwellings approved at La Vallee Vinery, La Route Des Coutures, St Martin.

Appeal decisions

For completeness, from 2015 the number of dwellings permitted through applications allowed following appeal decisions have been incorporated.

No new dwellings were approved on appeal this quarter.

Lapsed permissions

Full planning permission is generally granted for a period of three years, after which time the permission will expire, unless substantial building works have already commenced. The data in this section therefore relates to those full planning permissions expiring in the fourth quarter of 2016 which were approved in the fourth quarter of 2013.

During this quarter, there were four recorded lapsed permissions.

	Permissions	Permissions %	Dwellings	Dwellings %
Conversion	1	25	1	14.3
New Build	0	0	0	0
Redevelopment	2	50	5	71.4
Subdivision	1	25	1	14.3
Loss of units	0	0	0	0
Total	4	100	7	100

Figure 4: Full Planning permissions and dwellings lapsed this quarter, by house form

Long Term Trends

Urban/Rural development

Permissions Granted under the RAP and UAP

Whilst the Urban Area Plan makes provision for 90% of the housing requirement to come forward in the urban area, this is not to be interpreted as a target. Figure 5 suggests that on average 65% of permissions have been granted per year, in the urban area, since 1995. It is also noticeable that since 2000 the proportion of new dwellings within the urban area is generally higher than the preceding years. 2010 is an anomaly due to the number of dwellings demolished at the Bouet, St. Peter Port.

It is useful to monitor these trends of permissions between the urban and rural area, as it helps to show the proportion of development in each area.

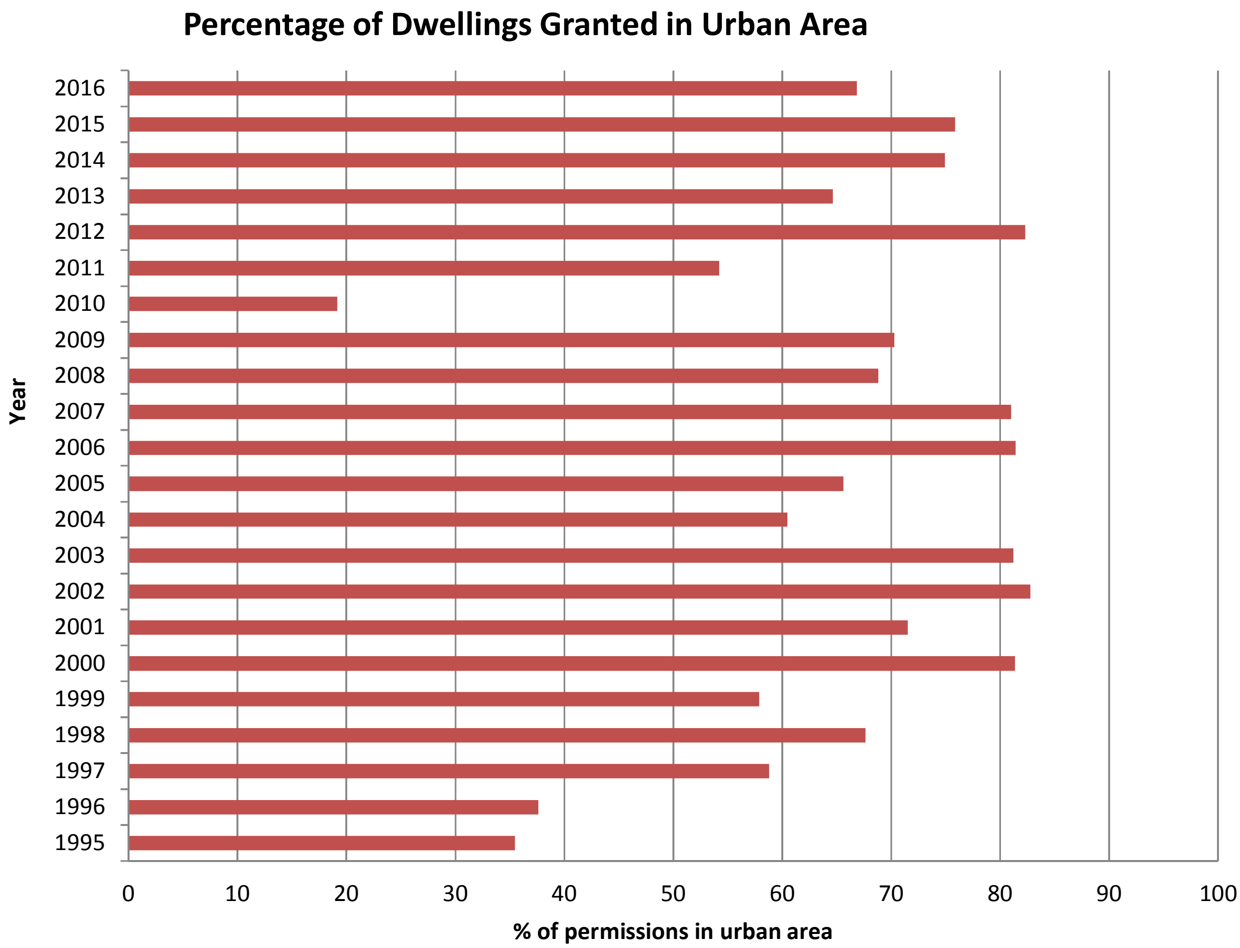


Figure 5: Percentage of planning permissions for new dwellings given in the urban area

<u>Permissions Granted Under the Island Development Plan</u>

The Island Development Plan introduces a new spatial strategy of Main Centres, Main Centre Outer Areas, Local Centres and Outside of the Centres. The following permissions were granted under the Island Development Plan:

Location	IDP Designation	Development type	Number of dwellings
112 Victoria Road, St Peter Port	Main Centre	Change of use	1
Coin Du Nocq, Nocq Road, St Sampson	Main Centre	Re-development	1
Vaux Douit Foulon Road, St Andrew	Outside of Centres	Revision of a subdivision	1
Les Domaines Bars, Rue des Messuriers, St Saviors	Outside of Centres	Conversion	2
Le Petit Jardin, Coin Colin, St Martin	Outside of Centres	Revision of a conversion to include an additional dwelling	2
Coup de Coeur, Rue de L'Ardaine	Outside of Centres	A revision of a redevelopment	0

Figure 6: Monitoring the proportion of dwellings permitted under the IDP

This represents 71% of new dwellings were granted Outside of the Centres. However, caution should be exercised on any analysis planning permissions granted under the IDP, given the short period of time and small number of sites being reported here**.**

Take up of permissions and completions

It is useful to monitor how many of these permissions get built (are taken up) and the rate of take up over the 3 year life of permissions. As well as some permissions not being taken up, there is also a delay between planning permissions being granted and ability to put a spade in the ground due to the requirement for other consents, completing negotiations or legal drafting or simply awaiting the availability of a builder. Monitoring this rate of take up trend informs the nature of pipeline supply and how many dwellings this is likely to result in on the ground. This information is available for a 22 year period, but for ease of presentation only information since 1996 is shown in Figure 7. It shows that after 1 year of being granted planning permission approximately one quarter of permissions for residential development are taken up, after 2 years just over half of permissions are taken up and after 3 years over two thirds of permissions are taken up. The trends for this quarter are back in line with those observed in the past, and when compared to last quarter may indicate a recovery in the housing market.

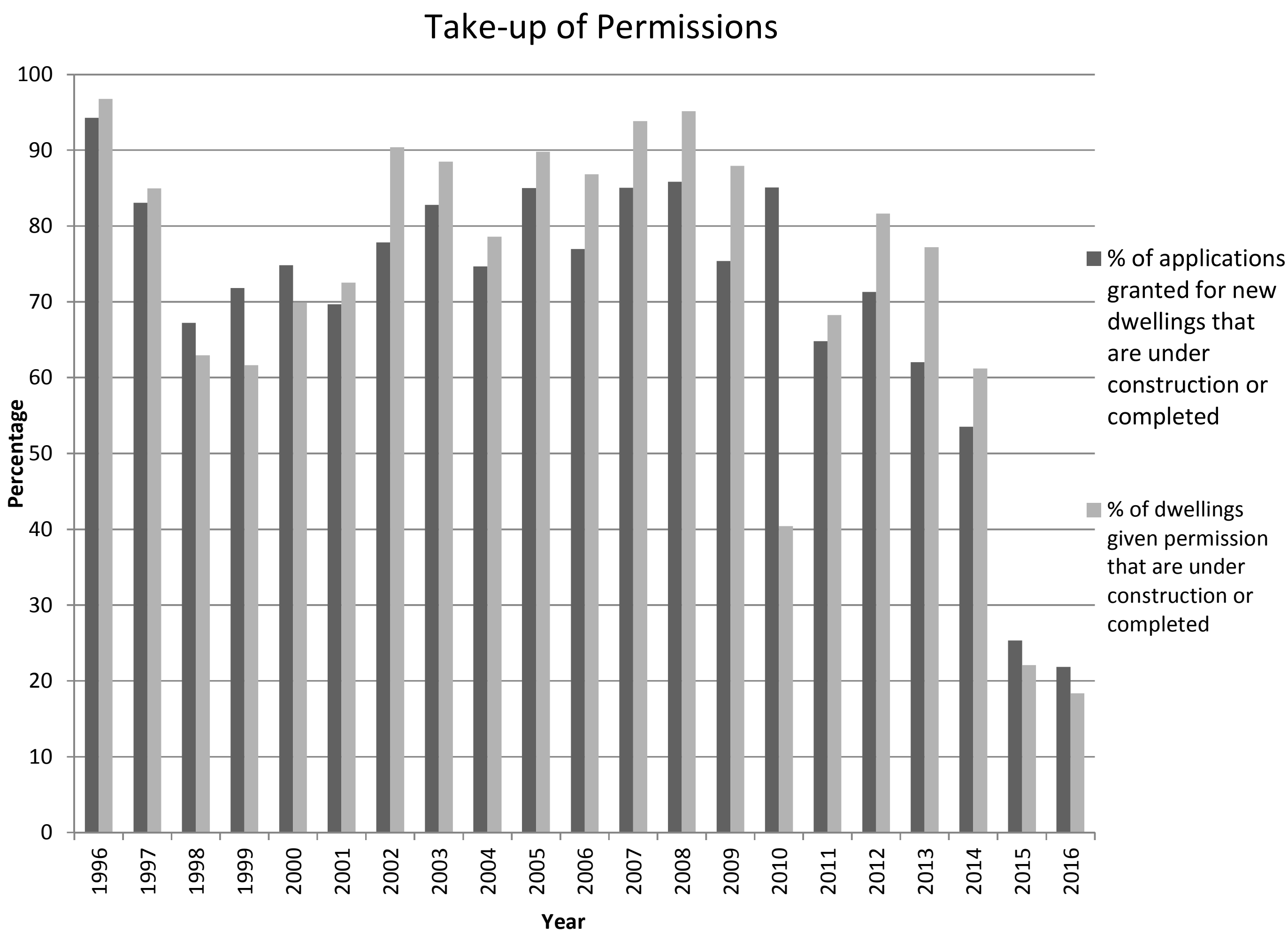


Figure 7: Monitoring the proportion of dwellings permitted that get built

Figure 7 sets out the number of dwellings that were approved in the given year (column 2) and how many of those have been constructed or are under construction (column 3) (i.e. it does not relate to the year in which they were built). Column 4 sets out the percentage of dwellings that have been built as a proportion of the total number of dwellings granted permission. For example, of the 249 additional dwellings given permission in 2009, 219 of those are under construction or have been constructed. Because developers are given 3 years in which to start development once planning permission has been granted, the figures in columns 3 and 4 for 2013 onwards are the totals to date.

Year	No. of dwellings approved in the given year	No of dwellings constructed or under construction from the applications granted in the given year	% dwellings take up as a proportion of the total no. of dwellings granted permission
2007	195	183	94
2008	186	177	95
2009	249	219	88
2010	94*	38*	40
2011	321	219	6
2012	316	258	82
2013	234	166	71
2014	323	161	50
2015	191	32	17
2016	528	97	18
10 yr total	**2637**	**1384**	**52**

Figure 8: Proportion of dwellings given planning permission that get built

*The low figure is explained by permission being granted for demolition of Le Bouet in 2010 and permission being given for the redevelopment of Le Bouet in 2011.

It is also of interest to note the proportion of planning permissions for new residential development which are implemented. This is set out in the table below. Again, because developers are given 3 years in which to start development once planning permission has been granted, the figures for 2013 onwards are the totals to date.

Year	No. of planning permissions involving new dwellings	No. of planning permissions that have been implemented from the permissions given in that year	% applications granted for new dwellings that have been implemented
2007	87	74	85
2008	99	85	86
2009	126	95	75
2010	114	97	85
2011	199	129	65
2012	115	82	71
2013	108	67	62
2014	99	53	54
2015	75	19	25
2016	119	20	22
10 yr total	**1141**	**721**	**64**

Figure 9: Proportion of planning applications consented for dwellings that get implemented

Lapsed permissions

As occurs elsewhere, a small percentage of permissions never come to fruition. This can be for a variety of reasons, such as difficulty accessing finance, a change in the market or, as is often the case, due to permission being superseded by more recent slightly different permissions for the same site.

Monitoring of this information commenced in 2014.

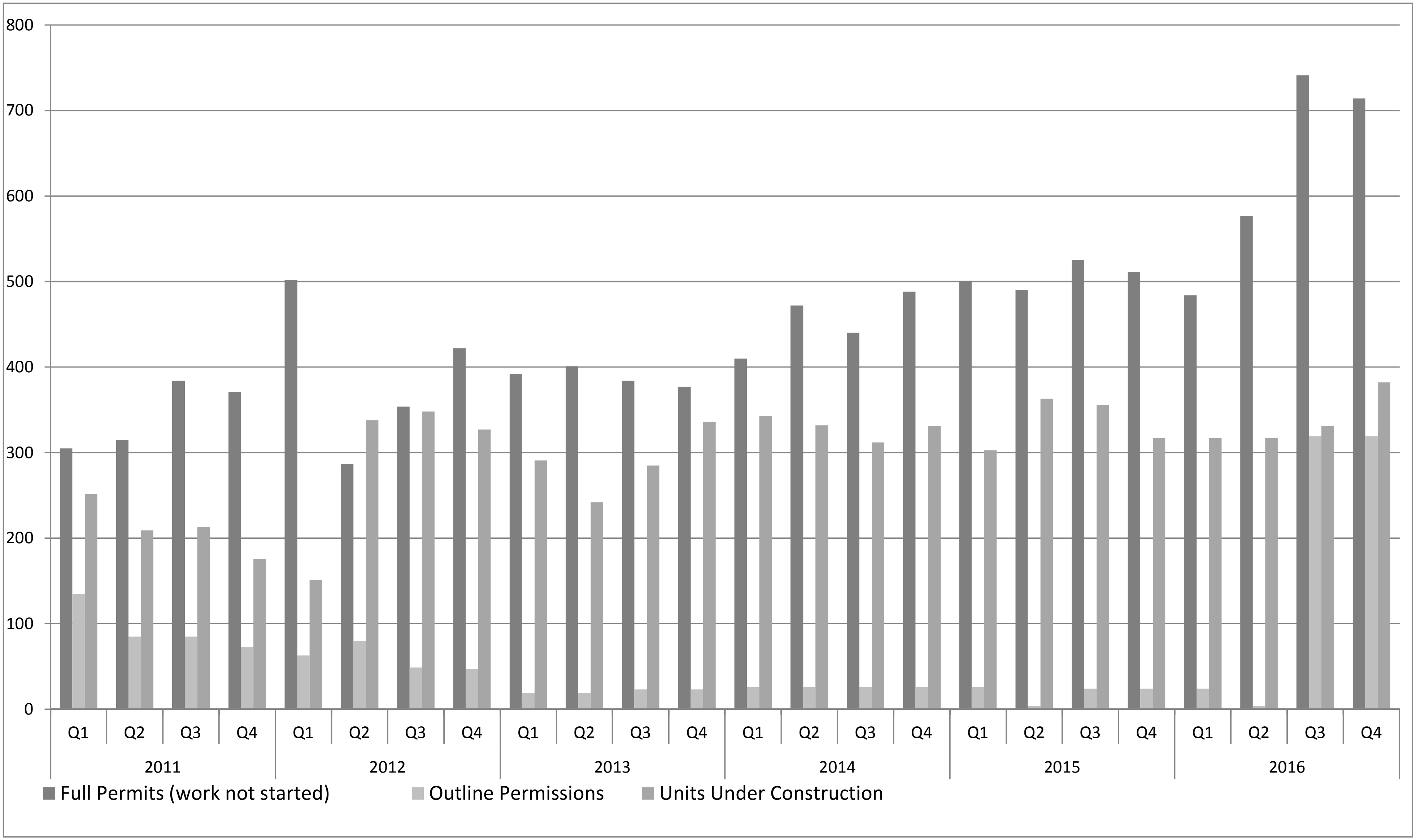
During this quarter four permissions have lapsed without being taken up for development.

It is the intention to begin to display this information in a table and chart form once an adequate number of entries have been collated.

Housing Land Availability - (Figures based on Development & Planning Authority's Housing Database)

	Dwellings approved during period					***Running totals at end of period***				
	Full Permits	Outline consents	**Total**	Area Urban	Rural	Full Permits & COU NOT Started	Outline consents	**Total** Not Started	Units under Construction	***Total*** *(Potential housing stock)*
2012										
Jan-March	146	1	**147**	143	3	502	63	**565**	151	**716**
April-June	43	19	**62**	48	14	287	80	**367**	338	**705**
July-Sept	86	0	**86**	82	4	354	49	**403**	348	**751**
Oct-Dec	105	0	**105**	59	46	422	47	**469**	327	**796**
Total for 2012	***380***	***20***	***400***	***332***	***67***	***422***	***47***	***469***	***327***	***796***
2013										
Jan-March	51	0	**51**	36	15	392	19	**411**	291	**702**
April-June	72	0	**72**	59	13	401	19	**420**	242	**662**
July-Sept	108	4	**112**	74	38	384	23	**407**	285	**692**
Oct-Dec	86	0	**86**	60	26	377	23	**400**	336	**736**
Total for 2013	***317***	***4***	***321***	***229***	***92***	***377***	***23***	***400***	***336***	***736***
2014										
Jan-March	68	3	**71**	25	46	410	26	**436**	343	**779**
April-June	98	0	**98**	61	37	472	26	**498**	332	**830**
July-Sept	85	0	**85**	87	9	440	26	**466**	312	**778**
Oct-Dec	95	0	**95**	79	16	488	26	**514**	331	**845**
Total for 2014	***346***	***3***	***349***	***252***	***108***	488	26	**514**	331	**845**
2015										
Jan-March	40	0	**40**	26	14	501	26	**527**	303	**830**
April-June	69	0	**69**	55	14	490	4	**494**	363	**857**
July-Sept	71	20	**91**	85	6	525	24	**549**	356	**905**
Oct-Dec	31	0	**31**	24	7	511	24	**535**	317	**852**
Total for 2015	211	20	**231**	190	41	511	24	**535**	317	**852**
2016										
Jan-March	68	0	**68**	59	9	484	24	**508**	317	**825**
April-June	148	0	**148**	80	68	577	4	**581**	302	**883**
July- Sept	219	319	**538**	493	45	741	319	**1060**	331	**1391**
Oct-Dec	93	0	**93**	40	53	714	319	**1033**	382	**1,415**
Total for 2016	528	319	**847**	672	175	714	319	**1033**	382	**1,415**

- Please note that the number in the *'Total for 200X' row (from 2010-2012)* is smaller than the apparent aggregate for that year. This is because the *'Total'* figure weeds out duplicate applications approved for any one scheme during that year. It is not uncommon for several permissions to be issued for a single scheme as plans are amended either before or during construction. A change in methodology negates this from 2013 onward.



The graph gives a 'snapshot' of the status of housing land availability at the end of each quarter. The numbers are not cumulative.