



Island Development Plan - Quarterly Monitoring Report

Quarter 1 - 2018



States of Guernsey
Planning Service

1. Introduction

To ensure that the Island Development Plan (IDP) continues to be effective and relevant it requires on-going monitoring of the success of its policies in achieving the Plan's objectives and the requirements of the Strategic Land Use Plan.

The Development & Planning Authority's approach to monitoring the Island Development Plan is set out in detail in Section 21 of the IDP. In summary, the Authority publishes quarterly and annual monitoring reports.

Quarterly monitoring reports are a factual report providing an update on the delivery of housing and employment related development through the planning system. These are important barometers of the Island economy and of the successful implementation of the Island Development Plan (IDP).

The quarterly reports are informative and use quantitative data sourced from the Authority's records and from market information available online. The reports record the net change in new dwellings permitted and floorspace and land for employment uses (offices, industry and storage & distribution). Further analysis is provided on the nature and location of planning permissions.

The Annual Monitoring Reports are more comprehensive reports that contain both quantitative and qualitative information, analysis and include feedback from stakeholders. The annual reports include an assessment of whether the IDP Plan Objectives are still appropriate and being met, whether the requirements of the Strategic Land Use Plan are being met and will determine whether there is a need to:

- undertake a partial or full review of the Island Development Plan
- prepare a new statutory Plan
- review the Strategic Land Use Plan, 2011
- provide updated or new guidance or evidence
- review housing land supply and allocated sites for housing
- review employment land supply and land allocated for employment uses
- take action to help bring forward sites for development, wherever possible in partnership with landowners and developers
- take action to help secure the timely provision of infrastructure.

This process enables the Island Development Plan to maintain sufficient flexibility to adapt to changing circumstances.

2. Residential Development

Introduction

The Island Development Plan has an objective to 'ensure access to housing for all' and generally supports the development of new dwellings in the Main Centres, Main Centre Outer Areas and Local Centres. New dwellings are also supported Outside of the Centres, in certain circumstances, through sub-division of existing dwellings or through conversion of redundant buildings.

Consistent with the Strategic Land Use Plan (2011), the Island Development Plan (IDP) makes provision for the Island's housing requirement for the first five years of the Island Development Plan period and 15 sites have been allocated in the IDP specifically for housing development, all within either a Main Centre or Main Centre Outer Area which, combined with 'windfall'¹ development on other sites and existing permissions, make up the five year requirement.

The housing requirement is based on the States' Strategic Housing Indicator. When the IDP was adopted in November 2016, this indicator was set at 300 additional new dwellings each year. The indicator will be subject to review by the States from time to time. In accordance with the Strategic Land Use Plan, the Authority seeks to ensure that a two-year housing provision is effectively made at any one time through housing permissions. This is called the 'pipeline supply'. Given the current annual indicator of 300 additional new dwellings per year, this equates to 600 new dwellings.

The primary purpose of the quarterly housing monitoring is to monitor whether a two year supply of housing permissions is being maintained. In addition, other statistics are presented to provide a more in-depth analysis of the type, source and spatial distribution of new dwellings and the take-up² 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.

'Pipeline' Housing Supply

New housing is deemed to be effectively available where planning permission has been granted and the development is not yet complete, and where the development of new

¹ Windfall Sites are undesignated sites that come forward for development during the Island Development Plan period which are not specifically identified in the Island Development Plan for that purpose, but for which policies exist to support its provision.

² The 'take-up' of planning permissions refers to developments with planning permission that have commenced i.e. building work has begun on site.

housing is acceptable in principle (outline planning permission). **Figure 1** below demonstrates the number of dwellings in the 'pipeline' this quarter:

Source of Supply	Number of dwellings				Total Q4 '17	Total Q3 '17	Total Q2 '17
	Main Centres	Local Centres	Outside of the Centres				
Full permissions (work not commenced)	294	43	103	440	486	510	497
Outline permissions	319	0	26	345	345	319	319
Under Construction	278	2	81	361	346	319	320
Total	891	45	210	1146	1177	1148	1136
Pipeline Supply	1146						

Figure 1: Pipeline Housing Supply (with comparison to previous quarters)

A full breakdown of the pipeline housing supply by the individual Main Centres, Main Centre Outer Areas and Local Centres is provided in Appendix 1.

The largest permissions (20 or more dwellings) in the pipeline supply are:

Site	Dwellings	Decision	Progress	Centre
Leale's Yard, The Bridge (outline)	303	24/8/16	Work not started	St Sampsons / Vale MC
Leale's Yard, The Bridge (full)	109	24/8/16	Work not started	St Sampsons / Vale MC
Rue Du Tertre/La Route Du Braye, Vale (sheltered housing)	43	4/11/14	Under construction	St Sampsons / Vale MCOA
St Martin's Hotel, St Martin	35	21/7/16	Work not started	St Martin's LC
Guernsey Brewery & No.11 & 12 The Strand, St Peter Port	34	6/5/15	Under construction	St Peter Port MC
Les Blanchés, St. Martin (outline) (sheltered and affordable housing)	26	27/11/17	Work not started	Outside of the Centres
Clos Barbier, St Martin (social rent and partial ownership)	24	23/5/16	Under construction	Outside of the Centres
Springburn (Former CI Tyres), La Charroterie, St Peter Port	23	8/9/15	Under construction	St Peter Port MC
Warry's Bakery, St Peter Port (partial ownership)	20	13/5/16	Under construction	St Peter Port MCOA

Figure 2: Largest permissions in the pipeline

The remainder of the pipeline supply is made up of 529 permissions.

First Quarter 2018 - Permissions

Approvals this quarter

Full planning permission was granted for a total of 37 additional dwellings on 20 sites during the first quarter of 2018.

This is down 37% on the fourth quarter of 2017 where 59 new dwellings (excluding outline permissions) were granted permission.

The average number of dwellings approved per quarter over the past 3 years was 70 units (not including outline permissions). Therefore this quarter's approvals are below average.

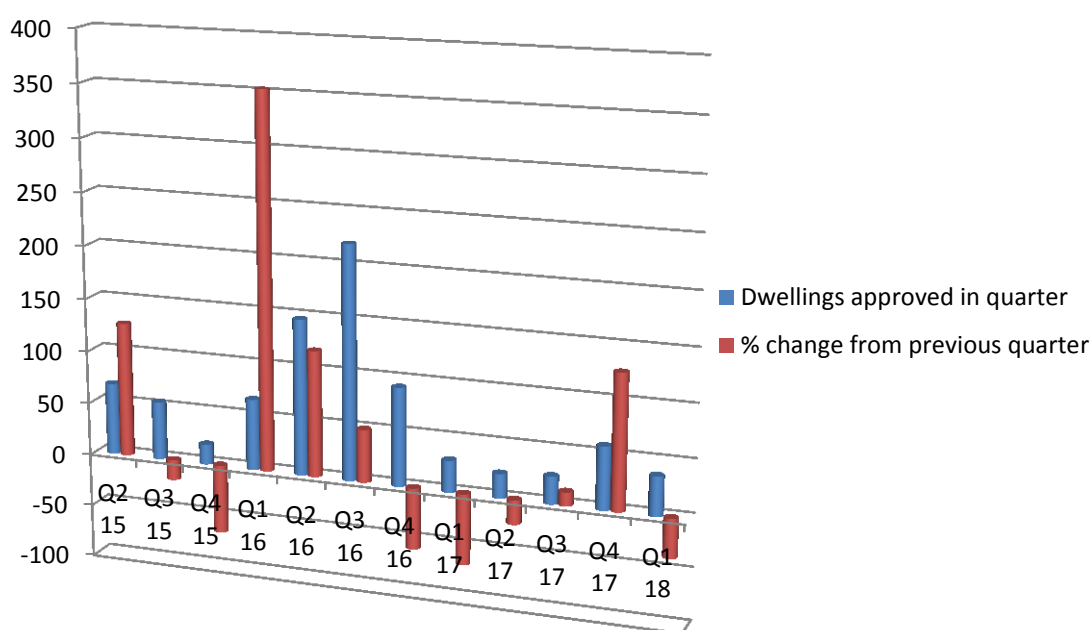


Figure 3: Dwellings approved in quarter and percentage change from previous quarters – 3 year period (excluding outline permissions)

The largest full planning permissions granted this quarter were at Upham's Yard, Les Amballes, St. Peter Port (variation to plans previously approved to erect 14 flats and 3 dwellings with associated parking - create 1 flat and 1 maisonette to Block B) (this is a reduction of 1 dwelling from the previous permission and is included in the statistics as the variation changes the number of units) and Le Courtil Jardin, Guelles Lane, St. Peter Port (demolish existing dwelling and erect 6 dwellings).

Location of Development

The approvals this quarter represent a split of 27 dwellings [73%] in Main Centres, 1 [3%] in Local Centres and 9 [24%] Outside of the Centres.

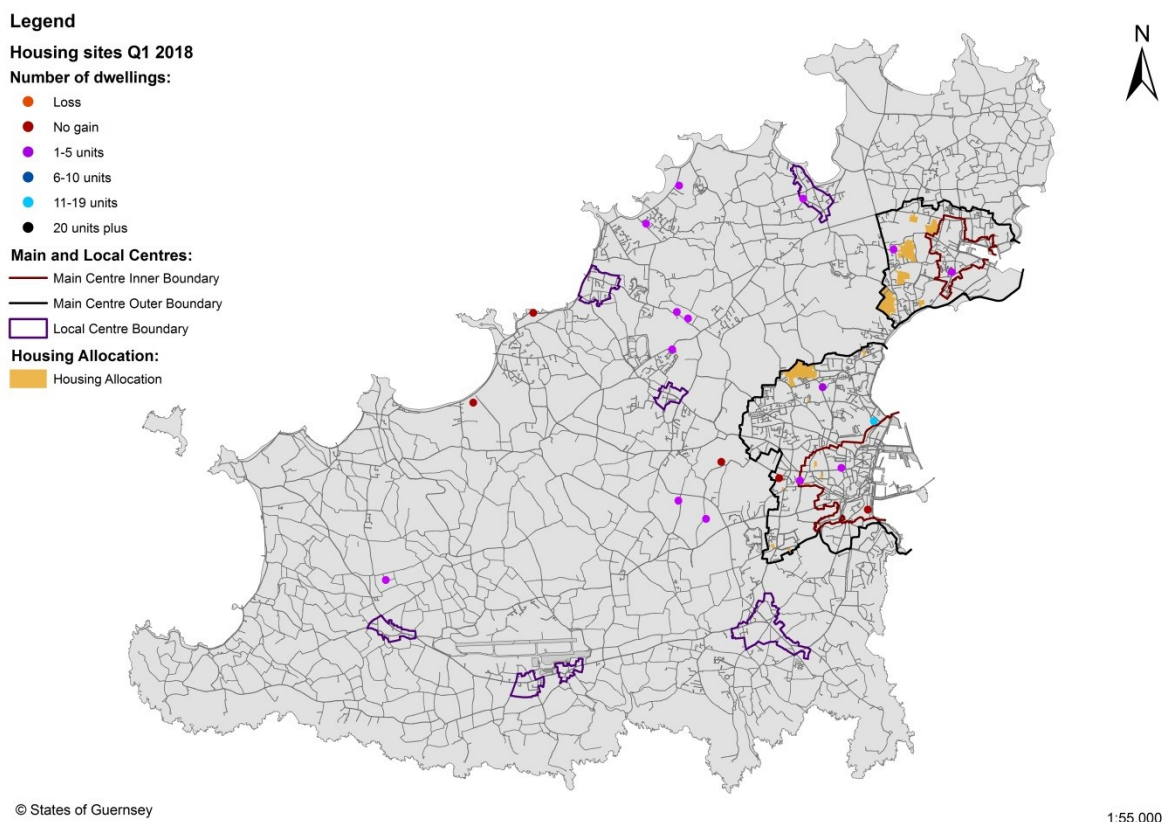


Figure 4: Dwellings approved in quarter

Brownfield / Greenfield development

The Island Development Plan allows for the development of greenfield sites for residential development where they are located within a Main Centre, Main Centre Outer Area or Local Centre and where there are no other designations restricting development (such as Important Open Land). The Plan also allows for development of greenfield sites Outside of the Centres through conversion of redundant buildings.

3 dwellings were permitted on greenfield sites this quarter, a conversion of a barn at Rue Du Monnaie, St. Andrew, conversion of an outbuilding at Rue Charruee, Vale (both of which are Outside of the Centres) and a new-build dwelling at La Marette Road, St. Sampson (in L'Islet Local Centre).

Types of development and dwellings permitted

The types of development and dwellings permitted this quarter are as follows:

Type of development	Use Class					Total
	Detached house (1a)	Semi-detached / terraced house (1b)	Flat (2)	Sheltered housing (3) ³	House in Multiple Occupation (6)	
New build	2					2
Re-develop	2	9	13			24
Sub-division		2				2
Conversion	4	3	2			9
Loss of units						
Total	8	14	15			37

Figure 5: Types of development and dwellings permitted

The numbers of dwellings shown in Figure 5 relates to the net number of dwellings in each development e.g. where 3 new dwellings replace 1 dwelling this is counted as 2. The size and type of new dwellings permitted this quarter are shown in Figure 6. 45 new dwellings will replace 6 detached and 2 semi-detached dwellings, giving the net figure of 37 dwellings permitted this quarter.

Number of bedrooms - New Dwellings						
Unit type	1	2	3	4+	HMO	Total
Detached	3	2	3	3		11
Semi-detached	3	4	2		1	10
Terraced		3	1	5		9
Flat	5	9	1			15
Sheltered						
Total	11	18	7	8	1	45

Figure 6: Size and type of dwellings permitted this quarter

There was no new specialised housing permitted this quarter. Specialised housing includes housing units with care provided to residents such as extra care accommodation, nursing and residential homes and other accommodation for people in need of care.

Affordable Housing⁴

Island Development Plan policy GP11 requires proposals for development resulting in a net increase of 20 or more dwellings to provide a proportion of the developable area of the site for affordable housing. In some cases the provision of units or, in exceptional cases, off-site

³ Sheltered Housing is a group of dwellings affording facilities and support services especially suited to the needs of older, disabled or other persons with particular needs (including the on-call assistance of a warden) as a permanent residence.

⁴ Affordable Housing is for those households whose needs are not met by, or who cannot afford, accommodation in the private sale or rental market without assistance. It is normally provided through the States of Guernsey or a registered Housing Association.

land or unit provision is permitted. In addition, some permissions are given for affordable housing exclusively (such as developments by the Guernsey Housing Association).

No sites had a Policy GP11 Affordable Housing requirement this quarter.

The total affordable housing permitted to date under the Island Development Plan is 0ha land / 50 units.

Delivery of housing - Developments Commencing and Completed

Whilst the housing supply requirement in the IDP relates only to the number of permissions granted, it is also useful to monitor how many of these permissions get built (are taken-up). The annual rate of take-up is analysed in the Annual Monitoring Report.

Figure 7 shows that the total number of dwellings commencing construction this quarter is 27. This is 7.5% of the total number of dwellings under construction (361).

Figure 7 shows that the total number of dwellings completed construction this quarter is 33.

Location		Commencements		Completions	
		Sites	Dwellings	Sites	Dwellings
Main Centres					
	New build	-	-	-	-
	Re-development	4	21	-	-
	Sub-division	1	2	-	-
	Conversion	-	-	1	1
	Total	5	23	1	1
Local Centres					
	New build	-	-	-	-
	Re-development	-	-	-	-
	Sub-division	-	-	-	-
	Conversion	-	-	-	-
	Total	-	-	-	-
Outside of the Centres					
	New build	-	-	2	23
	Re-development	5	2	2	6
	Sub-division	-	-	-	-
	Conversion	1	2	3	3
	Total	6	4	7	32
	Total	11	27	8	33
Running total since IDP adoption		63	198	50	115

Figure 7: Developments commencing and completing during the quarter

Delivery of housing – Source of the supply

In accordance with the requirements of the Strategic Land Use Plan the Island Development Plan identifies a minimum five year land supply for housing; given the current annual Strategic Housing Indicator of 300 additional new dwellings per year this is 1,500 dwellings. There will be a review of housing land supply after five years (2021), unless monitoring indicates a more urgent need to review the land supply sooner.

The methodology used to identify the supply of land for housing to meet the housing indicator (the Strategic Housing Land Availability Assessment, 2014 (SHLAA)) identifies a 5 year supply of housing based on:

A. Dwellings with permission / under construction	713
B. Allocated sites	718
C. Windfall allowance	150-300

A summary explanation of the methodology used to identify the supply of land for housing is available [here](#) ('Approach to the Housing Sites Allocations in the Draft Island Development Plan, December 2014').

A. Dwellings with permission / under construction

The current pipeline supply (dwellings with permission or under construction) is 1146 dwellings. See [Figure 1](#) above.

B. Allocated sites

There are 15 housing allocations in the IDP in the Main Centres and Main Centre Outer Areas which are identified to be used for housing development including ancillary complementary development. The progress in the delivery of housing on these sites is set out in [Figure 8](#) below.

Housing allocation sites	Progress	Net units in quarter	Net Units
Belgrave Vinery	None		
Bougourd Ford	None		
Braye Lodge	Development Framework adopted		
Cleveleys Vinery	Development Framework adopted		
Education offices	None		
Priaulx Garage	Permission 2017		19
Franc Fief	None		
King's Club	Permission 2016		13
La Vrangue	None since the adoption of the IDP		
Les Bas Courtils	Permission for works to house / barn 2017 Draft Development Framework published		5
Maurepas Road	None		
Petites Fontaines	Permission 2016		10
Pointues Rocques	Draft Development Framework published		

Housing allocation sites	Progress	Net units in quarter	Net Units
Saltpans	None		
Warry's Bakery	Reserved matters permission 2016 – under construction		20
Total units (net) permitted on allocations			67

Figure 8: Progress of housing site allocations

This quarter no dwellings were permitted on allocated housing sites. To date 67 dwellings have been permitted on allocated sites. Remaining supply from allocated sites is therefore c.651 dwellings. The 67 dwellings form part of the pipeline supply.

C. Windfall allowance

The 'windfall' allowance⁵ (sites other than the allocated sites) in the 5 year supply is up to 20% i.e. up to 20% of 1500 dwellings which is 300 dwellings over 5 years (this is based on historic trends and is not a target but is monitored here to inform future iterations of the Strategic Housing Land Availability Assessment. This equates to up to 15 dwellings per quarter. This quarter 37 dwellings were permitted on windfall sites. To date since the adoption of the IDP 183 dwellings have been permitted on windfall sites.

Housing supply

In summary, the current housing supply is shown in Figure 9.

Source of housing supply	Q1 2018	Q4 2017	Q3 2017
Dwellings with permission / under construction	1146	1177	1148
Remaining capacity on allocated sites	651	651	651
Windfall allowance	150-300	150-300	150-300
Total	2097	2128	2099
(with full windfall allowance)			
Years supply⁶	6.99	7.09	7.00
(based on 300 dwellings per annum, (with full windfall allowance))			

Figure 9: Source of housing supply

Delivery of housing - lapsed permissions

⁵ In the Strategic Housing Land Availability Assessment (SHLAA) only sites of 0.25 acres (0.1 Ha, 0.6 vergée) and over or that could provide 5 or more dwellings have been identified as contributing to the supply of land. It was envisaged that mainly sites below this threshold would contribute to windfall provision, although sites over this threshold may come forward as windfall. The Plan does not include housing site allocations in the Local Centres or Outside of the Centres and the SHLAA did not include those locations in the land supply. Any dwellings permitted in these locations would form part of the windfall provision.

⁶ The 'Years Supply' is an indicator to illustrate how the current supply of housing through the planning system compares to the requirement of the Strategic Land Use Plan to provide a 5 year supply in the Island Development Plan (IDP) (at the time of the adoption of the Plan). This is not a target but tracks the progress of the implementation of the IDP. A supply of less than 5 years (currently 1500 dwellings) would indicate that further housing sites may be required to be allocated through a review of the IDP. A continuous supply of 5 years is not a requirement.

Full planning permission is generally granted for a period of three years, after which time the permission will expire, unless building works have already commenced. The data in this section therefore relates to those full planning permissions expiring in the first quarter of 2018 which were approved in the first quarter of 2015.

During this quarter, 9 full permissions (10 dwellings) lapsed without being taken up for development – see [Figure 10](#) below. This represents 13% of the 69 planning permissions granted in 2015. 31 of these permissions have been taken-up to date.

Location	Lapsed Permissions Q1 2018	Lapsed Permissions 2015	Lapsed Dwellings Q1 2018	Lapsed Dwellings 2015
Main Centres	3	3	6	6
Local Centres	0	0	0	0
Outside of the Centres	6	6	4	4
Total	9	9	10	10

Figure 10: Permissions lapsing during the quarter and 2015

Note: Lapsed permissions can relate to a replacement dwelling on a one-for-one basis so that there is no net increase or decrease of units. Therefore, the number of dwellings not built as a result of permissions for redevelopment lapsing may not necessarily reflect the number of permissions lapsing.

3. Employment Development

Introduction

The Island Development Plan has an objective to 'support a thriving economy'. The Plan makes provision for a range of new employment developments throughout the Island where they make a positive contribution to the sustainability of a strong local economy.

The indicators used in this monitoring reflect the Island Development Plan policy approach to employment uses:

Offices – the IDP's approach to office use is to focus this use in the Main Centres, where there are existing clusters of offices, while recognising the need for large floorplate office space with the allocation of an Office Expansion Area at Admiral Park (for floorplates over 1000m²). The IDP also seeks to retain existing offices in Main Centres but allows for smaller premises under 250m² to change use, to address an oversupply of, mainly tertiary, small office space. New offices are also supported in Local Centres where they are of an appropriate scale for the Local Centre concerned. Outside of the Centres, new office development is supported through conversion of redundant buildings only.

Industry and Storage & Distribution - the IDP's approach to Industry and Storage & Distribution reflects the findings of the Employment Land Study 2014 that the Island is now over-provided with industrial and storage and distribution premises. In managing change in this sector it is recognised that there remains a need to specifically protect some land for Industry and Storage and Distribution to ensure suitable land is available that can be readily developed for a range of industrial and storage/distribution purposes. The IDP, therefore, seeks to protect certain areas for industry and storage and distribution uses – Key Industrial Areas (KIAs) and Key Industrial Expansion Areas (KIEAs).

The IDP directs industry and storage uses toward the KIAs and KIEAs, and also supports industrial use elsewhere within the Main Centres. Within the Main Centres and Main Centre Outer Areas new industry and storage use is also possible through conversion of a redundant building. In Local Centres these uses are also supported where they are of an appropriate scale for the Local Centre concerned. Outside of the Centres, these uses are supported at the KIEA at La Villiaze, St Saviours, and on redundant glasshouse sites under certain circumstances and through conversion of redundant buildings.

The IDP supports, in principle, the continued use, extension, alteration and redevelopment of existing industrial and storage sites throughout the Island and is generally supportive of change of use away from employment uses outside of the KIAs.

The purpose of the quarterly employment monitoring is to monitor the supply of employment premises and land in the Island arising through the planning system and premises and land available to the market for let and/or for sale. The information on premises available to the market is provided every second quarter to match long term trends in monitoring and reflect the pace of change in the market. The monitoring does not include the implementation of permissions as change of use permissions can be carried out

without the need for a building regulations licence and some change of use can occur without the need for planning permission. In both cases the Planning Service will not have a record of commencement and completion of the change. The marketed premises data provides an alternative analysis of demand and includes the 'take-up' of premises.

The types of employment land and premises monitored are Offices (use classes 15, 16 and 17), Storage or Distribution (use classes 22 and 23) and Industrial (use classes 24, 25, 26 and 27).

It is recognised that other sectors, particularly retail and the visitor economy, make a significant contribution to employment in the Island. These uses are monitored on an annual basis as part of the Annual Monitoring Report. Trends in planning permissions for home-based employment will also form part of the Annual Monitoring Report.

Approvals this period

Between 1st January 2018 and 31st March 2018 planning permission has been given for the following net change in floor space (m²):

Use Class	Financial & professional office (15)	Administrative office (16)	Temporary office (17)	General storage or distribution (22)	Special storage (23)	Light industry (24)	General industry (25)	Special industry (26)	Waste (27)	TOTAL
Location										
Main Centres		-227								-227
Local Centres										
Outside of the Centres				-234		340	117			223
TOTAL		-227		-234		340	117			

Figure 11: Net change in floor space (m²) by Use Class granted planning consent between January-March 2018

In summary, offices - net total of -227m² permitted; industry - net total of 457m² permitted; storage or distribution - net total of -234m² permitted.

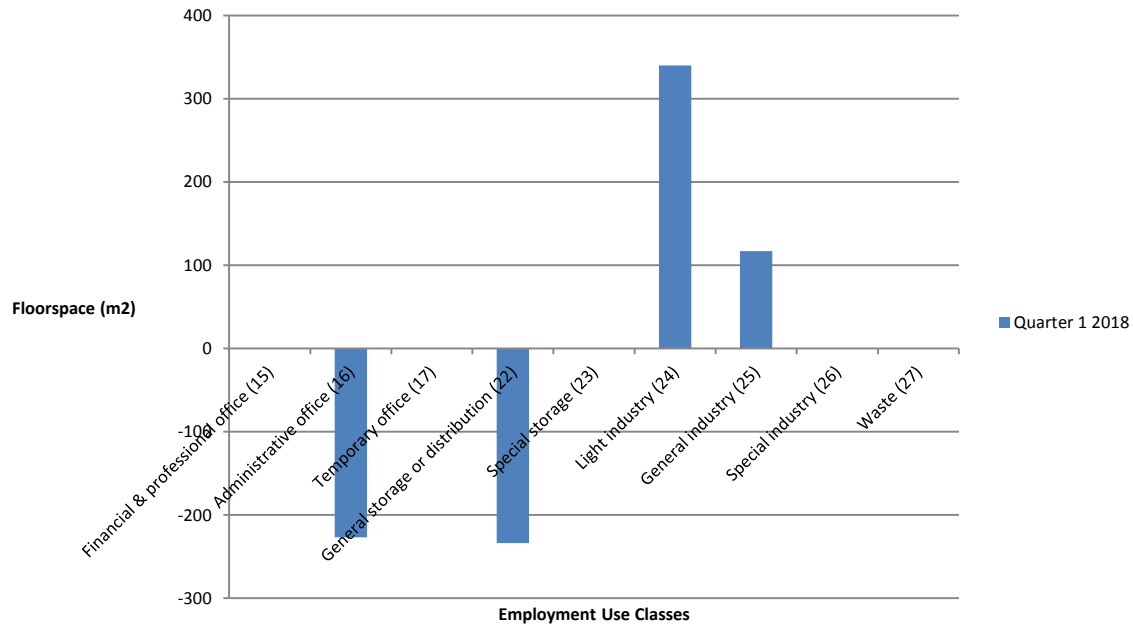


Figure 12: Employment floorspace approved in year to date

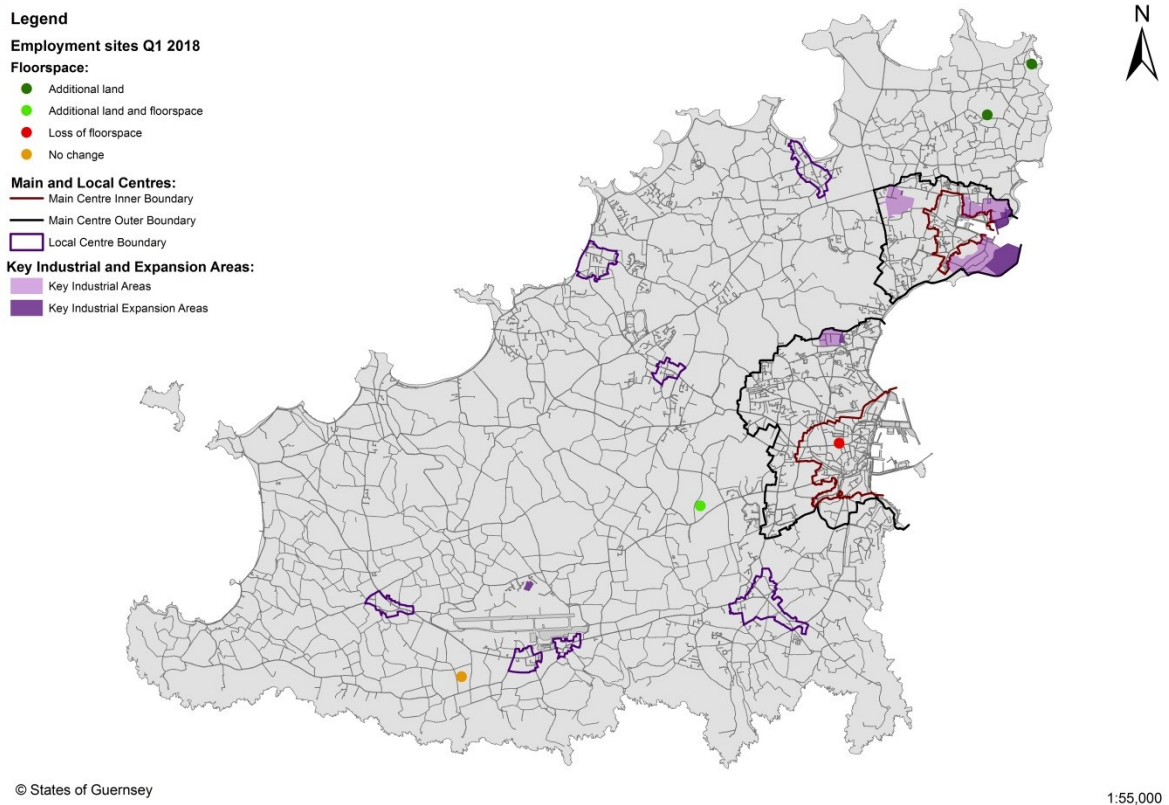


Figure 13: Employment sites approved in quarter

- There were 3 permissions granted in the quarter that included a change in floorspace
- 1 permission was granted in a Main Centre for change of use from office to two residential units

- 2 permissions were granted Outside of the Centres, to change use of part of a building from storage to industrial use and to change use of a horticultural building to industrial use.

Trends in supply of Employment Floorspace

The supply of employment land and floorspace through the planning system is often irregular, with applications for relatively large floor areas being submitted on an infrequent basis. The following table indicates, in broad terms, increases and decreases in floor space for each use class granted planning permission over the quarter in comparison to previous periods:

Use Class	Change over 1 st quarter 2018	Change over 4 th quarter 2017	Change over 3 rd quarter 2017	Change over 2 nd quarter 2017
Financial & professional office (15)	-	↑	-	↓
Administrative office (16)	↓	↓	↓	↑
Temporary office (17)	-	-	-	-
General storage or distribution (22)	↓	-	↓	↓
Special storage (23)	-	-	-	-
Light industry (24)	↑	↑	↑	↓
General industry (25)	↑	-	↑	-
Special industry (26)	-	-	-	-
Waste (27)	-	-	↑	↑

Figure 14: Net change in floor space by Use Class granted planning consent over the period

The above figures should be taken as a snapshot in time. Analysis of changes over a longer period of time will be provided in the Annual Monitoring Reports to give a more accurate picture of trends.

Summary: Employment Land

The Employment Land Study 2014 forecasts a need for around 2.26ha less industrial and storage & distribution land (sites with or without premises) over the 10 year life of the Island Development Plan. This quarter a net total of 0.46ha of land was given permission for an industrial or storage or distribution use. This compares with an addition of 0.1ha in the previous quarter.

The sites added / lost from the supply of industrial or storage or distribution land were:

- Change of use of agricultural land at Les Grands Marais, Vale, to storage and distribution use (0.24ha)
- Change of use of agricultural land to a boatyard at Beaucette Marina (0.2ha)
- Change use of a horticultural building to industrial use at Pointes Lane, St. Andrew (0.02ha).

	Net change over 1 st quarter 2018	Net change over 4 th quarter 2017	Net change over 3 rd quarter 2017	Net change over 2 nd quarter 2017
Industrial Land	0.02	0.10	-	-0.01
Storage & Distribution Land	0.44	-	0.08	0.29
Total	0.46	0.10	0.08	0.28

Figure 15: Net change in industrial and storage & distribution land over the period (hectares)

Appendix 1 – Pipeline Housing Supply – detailed ‘Centres’ analysis

Location	Number of dwellings			Total
	Full permissions (work not commenced)	Outline permissions	Under Construction	
St Peter Port MC	70	-	90	160
St Peter Port MCOA	63	16	122	201
St Sampsons / Vale MC	110	303	8	421
St Sampsons / Vale MCOA	51	-	58	109
Total MCs	294	319	278	891
Cobo Local Centre	-	-	-	-
Forest Local Centre	-	-	-	-
Forest West Local Centre	-	-	-	-
L'Aumone Local Centre	-	-	-	-
L'Islet Local Centre	4	-	1	5
St Martin's Local Centre	39	-	1	40
St Peter's Local Centre	-	-	-	-
Total LCs	43	-	2	45
Outside of the Centres	103	26	81	210
Total	440	345	361	1146

MC - Main Centre

MCOA – Main Centre Outer Area

Legend

Pipeline Q1 2018

Number of dwellings:

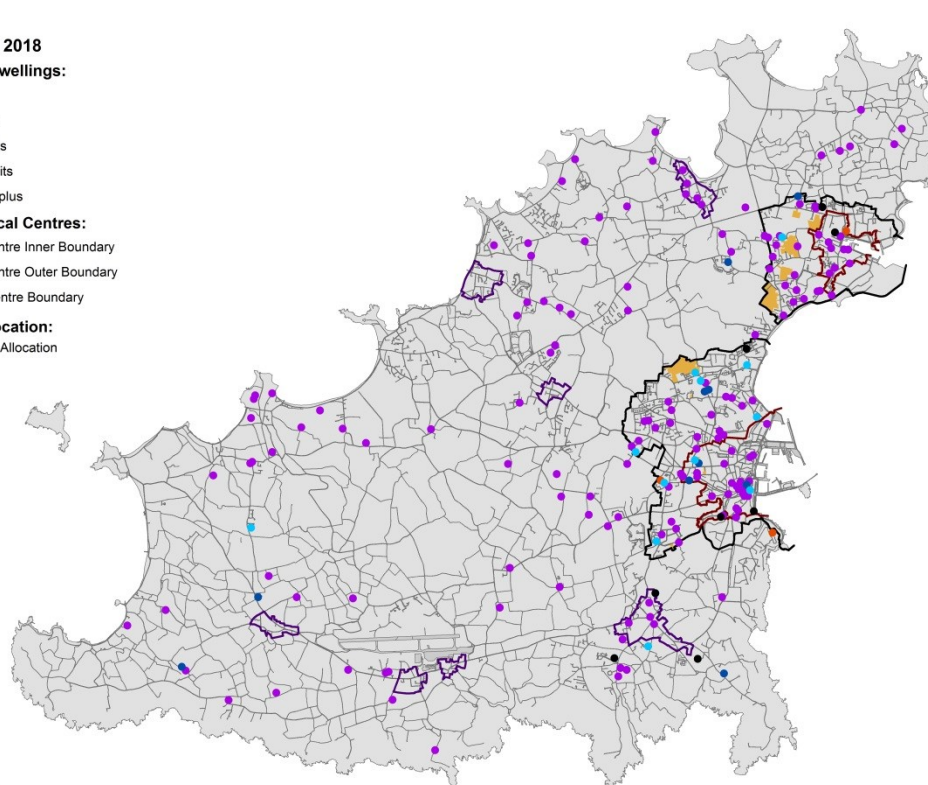
- Loss
- 1-5 units
- 6-10 units
- 11-19 units
- 20 units plus

Main and Local Centres:

- Main Centre Inner Boundary
- Main Centre Outer Boundary
- Local Centre Boundary

Housing Allocation:

- Housing Allocation



Contact Us for further information and advice at: Planning Service, Sir Charles Frossard House, St Peter Port. GY1 1FH Telephone 01481 717200 Email planning@gov.gg

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Copies of the text of the Island Development Plan (2016) are available from Sir Charles Frossard House. Copies of legislation are available from the Greffe. Electronic copies are also available at www.guernseylegalresources.gg.