Island Development Plan - Quarterly Monitoring Report

Quarter 4 - 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 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. In July 2018, the States resolved to agree the States Strategic Housing Indicator be set at creating 635 new units of accommodation between 2017 and 2021, with a plus or minus variance of 149 new units to give the flexibility to react to market changes. This equates to an annual average of 127 additional units of accommodation with a plus or minus variance of 30 new units of accommodation. It also agreed to separate the States Strategic Housing Indicator into an Affordable Housing Indicator set at creating 178 units of Affordable Housing over the next 5 years with a plus or minus variance of 32 new units to give the flexibility to react to demand and market changes and a private market housing indicator of 457 new units of accommodation with a plus or minus variance of 117 new units of accommodation for the same period. 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 97-157 additional new dwellings per year, this equates to 194-314 new dwellings (136-230 private market, 58-84 affordable housing).

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-up[2] of planning permissions.

[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.

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 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 Q3 '18	Total Q2 '18	Total Q1 '18
	Main Centres	Local Centres	Outside of the Centres				
Full permissions (work not commenced)	255	59	126	440	439	415	440
Outline permissions	16	0	0	16	16	345	345
Under Construction	249	2	60	311	327	350	361
Total	**520**	**61**	**186**	**767**	**782**	1110	1146
Pipeline Supply		**767**					

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	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 Blanches, St. Martin (sheltered and affordable housing)	26	27/11/17	Work not started	Outside of the Centres
Springburn (Former CI Tyres), La Charroterie, St Peter Port	23	8/9/15	Under construction	St Peter Port MC

Figure 2: Largest permissions in the pipeline

The remainder of the pipeline supply is made up of 497 dwellings.

Fourth Quarter 2018 - Permissions

Approvals this quarter

Full planning permission was granted for a total of 57 additional dwellings on 30 sites during the fourth quarter of 2018.

This is up 90% on the third quarter of 2018 where 30 new dwellings were granted permission.

The average number of dwellings approved per quarter over the past 3 years was 68 units (not including outline permissions). Therefore this quarter's approvals are below average.

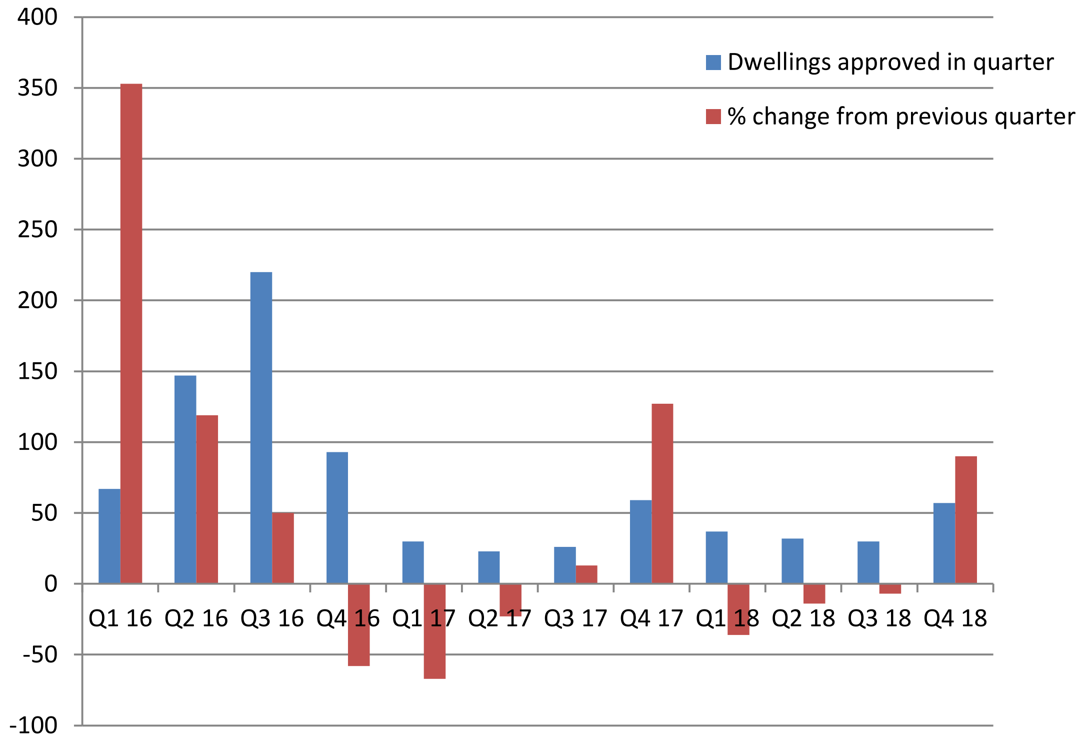


Figure 3: Dwellings approved in quarter and percentage change from previous quarters – 3 year period (excluding outline permissions)

The largest planning permissions granted this quarter were at Smith Street, St Peter Port (extension and change of use of upper floors to provide 7 residential units), Le Pre De La Cotte, Route De Carteret, Castel (erect 13 new dwellings) and Doyle Road, St. Peter Port (re-development to create 8 houses and 1 flat).

Location of Development

The approvals this quarter represent a split of 32 dwellings [56%] in Main Centres, 13 [23%] in Local Centres and 12 [21%] Outside of the Centres.

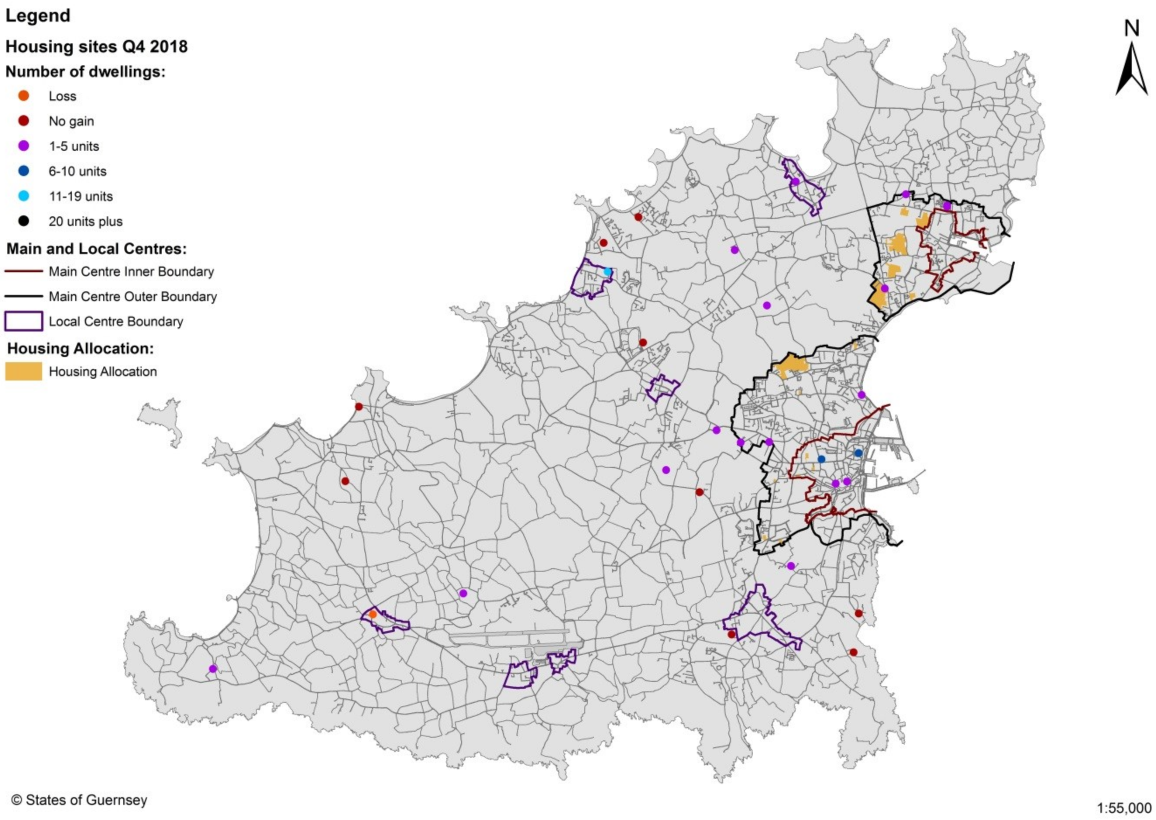


Figure 4: Dwellings approved in quarter

<u>Brownfield / Greenfield development</u>

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.

Under the Land Planning and Development (Guernsey) Law, 2005, horticultural premises, including redundant glasshouse sites and any ancillary structures, are treated as agricultural land and are therefore considered greenfield land.

17 dwellings were permitted on greenfield sites this quarter, conversion of 2 outbuildings to form a dwelling at Rue A Chiens, St. Sampson's (Outside of the Centres), alterations to an agricultural building to create 2 residential units at Rue Des Portelettes, Torteval (Outside of the Centres), conversion of a packing shed and boiler house to a dwelling at Les Portes, St. Sampson's (Outside of the Centres) and 13 new dwellings at Le Pre De La Cotte, Route De Carteret, Castel (Local Centre).

Types of development and dwellings permitted

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

	Use Class					
Type of development	Detached house (1a)	Semi-detached / terraced house (1b)	Flat (2)	Sheltered housing (3)[3]	House in Multiple Occupation (6)	Total
New build	2	14				16
Re-develop	8	14	3			25
Sub-division		1	1			2
Conversion	3	3	9			15
Loss of units		-1				-1
Total	13	31	13			**57**

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 show in Figure 6. 73 new dwellings will replace 16 dwellings as shown Figure 7, giving the net figure of 57 dwellings permitted this quarter. The size and type of new dwellings permitted this quarter are as follows:

	Number of bedrooms - New Dwellings					
Unit type	**1**	**2**	**3**	**4+**	**HMO**	**Total**
Detached	1	2	7	13		23
Semi-detached	1	17	4			22
Terraced	1	5	6	1		13
Flat	4	11				15
Sheltered						
Total	7	35	17	14		**73**

Figure 6: Size and type of dwellings permitted this quarter

The size and type of dwellings to be replaced by the above permissions are as follows:

	Number of bedrooms - Replaced Dwellings					
Unit type	**1**	**2**	**3**	**4+**	**HMO**	**Total**
Detached	1	2	5	2	1	11
Semi-detached		2	1			3
Terraced						
Flat	2					2
Sheltered						
Total	3	4	6	2	**1**	**16**

Figure 7: Size and type of dwellings to be replaced by the dwellings permitted this quarter

[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.

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 Housing[4]

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 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.

To date, under the Island Development Plan, Policy GP11 has yet to be relevant to a planning proposal and there has therefore been no land or units provided for Affordable Housing as a proportion of a developable site area as a direct result of this policy. However, 56 Affordable Housing units have been permitted under other Island Development Plan policies.

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 for monitoring of the States Strategic Housing Indicator 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 8 shows that the total number of dwellings commencing construction this quarter is 31 (14 private market, 17 Affordable Housing). This is 10% of the total number of dwellings under construction (311). Figure 8 shows that the total number of dwellings completed construction this quarter is 48 (all private market).

	Commencements Private		Commencements Affordable		Completions Private		Completions Affordable	
	Sites	Units	Sites	Units	Sites	Units	Sites	Units
Main Centres	6	12	1	17	4	38	-	-
Local Centres	1	1	-	-	1	1	-	-
Outside Centres	6	1	-	-	7	9	-	-
Total	**13**	**14**	**1**	**17**	**12**	**48**	**-**	**-**
Running total since IDP adoption	**94**	**162**	**7**	**117**	**68**	**148**	**7**	**93**

Figure 8: Developments commencing and completing during the quarter

[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.

Figure 9 shows how many dwellings were permitted in each year (including outline permissions) and how many dwellings have been completed from each year.

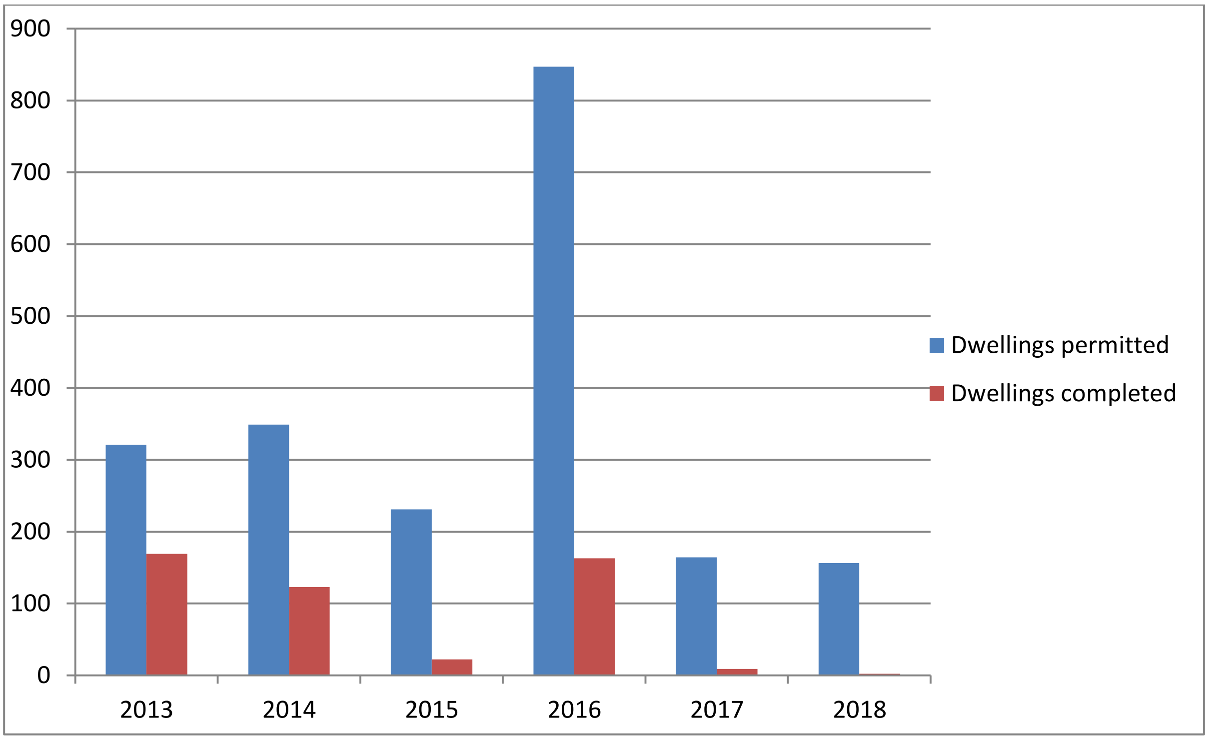


Figure 9: Dwellings permitted (net) and dwellings completed from the permissions in each year (2013 to date)

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. At the time the Island Development Plan came into force the annual Strategic Housing Indicator was 300 additional new dwellings per year giving a five year land supply requirement for 1,500 dwellings. In July 2018, the States resolved to agree the States Strategic Housing Indicator be set at creating 635 new units of accommodation between 2017 and 2021, with a plus or minus variance of 149 new units. Below is a review of the supply in relation to the new indicator. It should be noted that the indicator relates to the creation of new dwellings not the supply of land through the planning system. The supply of land must be sufficient to allow for the development of at least the number of units expressed as the States Strategic Housing Indicator. The States has no control over implementation of planning permissions and this is why the Indicator is not expressed as a target.

There will be a review of housing land supply before five years from the adoption of the IDP (November 2021), unless monitoring indicates a more urgent need to review the land supply sooner. As the new Strategic Housing Indicator of 635 new units of accommodation between 2017 and 2021 (+/- 149 units) is substantially lower than the former Strategic Housing Indicator of 1,500 units over the same period of time (300 units per year) there will be no immediate requirement to amend the IDP to identify additional housing land supply. As the IDP has provided for a five year supply of housing land at the former higher requirement this will be taken into account when providing for the next five year housing land supply in accordance with the SLUP.

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 767 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 10 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 (under construction)		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 Development Framework adopted		5
Maurepas Road	Permission 2018		6
Petites Fontaines	Permission 2016		10
Pointues Rocques	Draft Development Framework published		
Saltpans	None		
Warry's Bakery	Reserved matters permission 2016 – development completed		20
	Total units (net) permitted on allocations		**73**

Figure 10: Progress of housing site allocations

This quarter no additional dwellings were permitted on an allocated housing site. To date 73 dwellings have been permitted on allocated sites. Remaining supply from allocated sites is therefore c.645 dwellings. 53 of these dwellings form part of the pipeline supply.

C. Windfall allowance

The 'windfall' allowance[5] (sites other than the allocated sites) in the 5 year supply methodology used in the SHLAA (2014) is up to 20% i.e. up to 20% of 1500 dwellings which is 300 dwellings over 5 years. This equates to up to 15 dwellings per quarter. This quarter 57 dwellings were permitted on windfall sites. To date since the adoption of the IDP 296 dwellings have been permitted on windfall sites.

The windfall allowance was based on the former housing indicator (300 dwellings per annum) and historic trends. It is not a target but is monitored here to inform future iterations of the SHLAA. The windfall allowance will be reassessed as part of the update of the SHLAA alongside the housing land supply review before the 5 year point of the IDP.

Housing supply

In summary, the current housing supply is shown in Figure 11.

Source of housing supply	Q4 2018	Q3 2018	Q2 2018
Dwellings with permission / under construction	767	782	1110
Remaining capacity on allocated sites	645	645	651
Windfall allowance	150-300	150-300	150-300
Total (with full windfall allowance)	1712	1727	2061
Years supply[6] (based on 97-157 dwellings per annum, (with full windfall allowance))	10.9-17.6	11.0-17.8	13.1-21.2

Figure 11: Source of housing supply

Delivery of housing - lapsed permissions

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 fourth quarter of 2018 which were approved in the fourth quarter of 2015.

[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 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.

During this quarter, 5 full permissions (7 dwellings) lapsed without being taken up for development – see Figure 12 below. This represents 7.2% of the 69 full planning permissions granted in 2015. 38 of these permissions have been taken-up.

Location	Lapsed Permissions Q4 2018	Lapsed Permissions 2015	Lapsed Dwellings Q4 2018	Lapsed Dwellings 2015
Main Centres	3	20	6	40
Local Centres	-	0	-	0
Outside of the Centres	2	11	1	8
Total	**5**	**31**	**7**	**48**

Figure 12: 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 $1000m^2$). The IDP also seeks to retain existing offices in Main Centres but allows for smaller premises under $250m^2$ 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 (also see the Employment Land Study, Update Report, 2017) 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 & 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.

Approvals this period

Between 1st October 2018 and 31st December 2018 planning permission has been given for the following net change in floor space (m^2):

Use Class / Location	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
Main Centres		-159		-950			-78		250	**-937**
Local Centres										
Outside of the Centres				1115			-1115			**0**
TOTAL		**-159**		**165**			**-1193**		**250**	**-937**

Figure 13: Net change in floor space (m^2) by Use Class granted planning consent between October-December 2018

In summary, offices - net total of -159m^2 permitted; industry - net total of -943m^2 permitted; storage or distribution - net total of 165m^2 permitted.

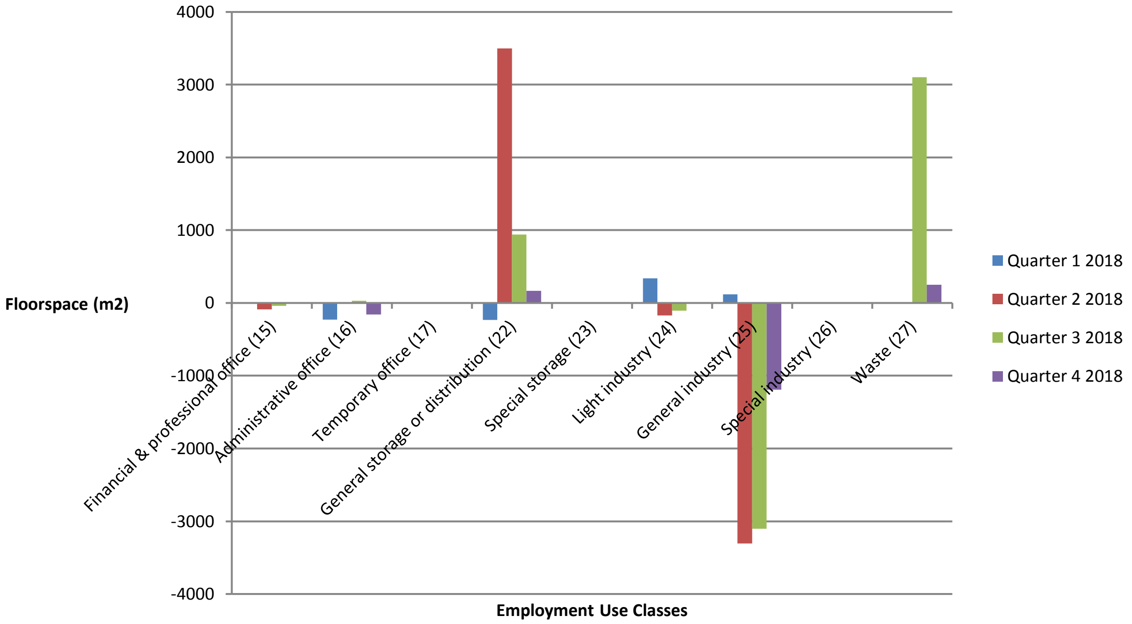


Figure 14: Employment floorspace approved in year to date

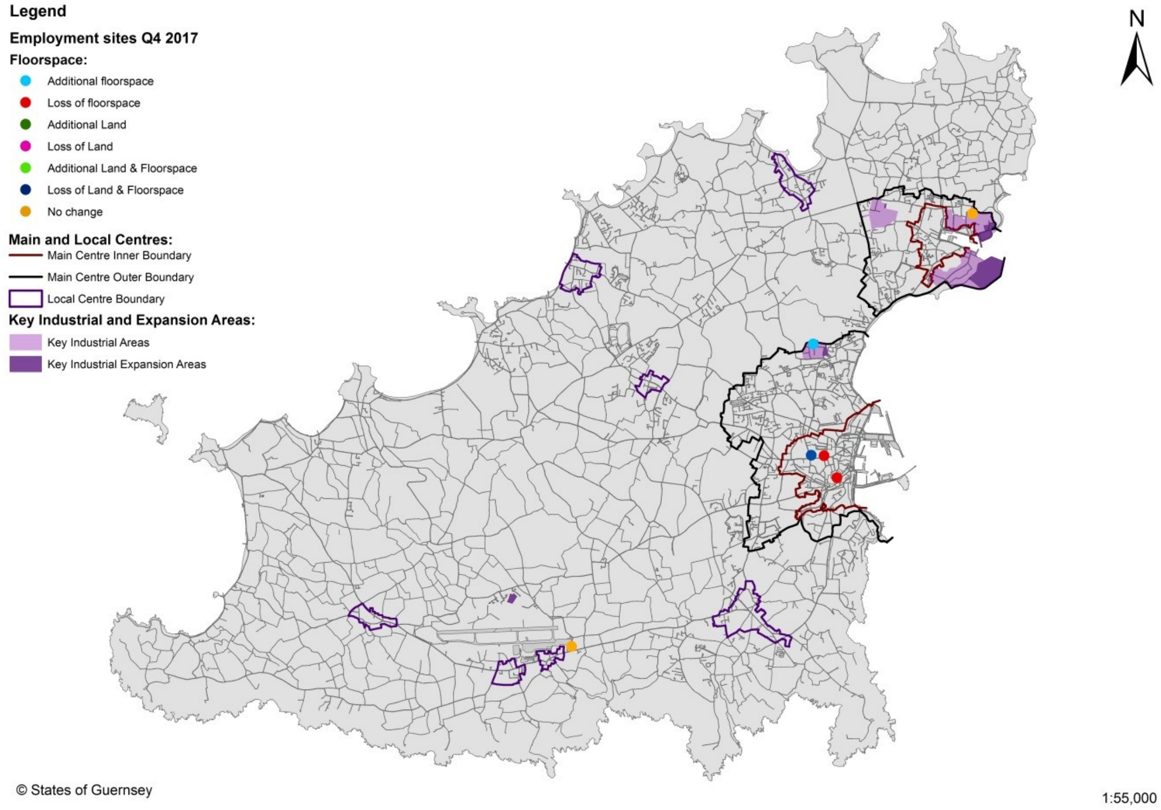


Figure 15: Employment sites approved in quarter

- There were 6 permissions granted in the quarter that included a change in floorspace
- 5 permissions were in Main Centres. These were for change of use of an industrial building in a Key Industrial Area to use class 27 for the storage and processing of

waste materials; an increase in floorspace in an industrial building in a Key Industrial Area; a change of use of an office to a flat; the redevelopment of storage buildings to residential use; and, the change of use of part of an office building to a training centre.
- 1 permission was Outside of the Centres to change the use of an industrial building to a self-storage facility.

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 4th quarter 2018	Change over 3rd quarter 2018	Change over 2nd quarter 2018	Change over 1st quarter 2018
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 16: 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 -0.12ha of land was given permission for an industrial or storage or distribution use. This compares with a gain of 0.4ha in the previous quarter.

The sites added / lost from the supply of industrial or storage or distribution land were:
- Re-development of storage buildings to create 8 houses and 1 flat at Doyle Road St Peter Port (-0.12ha).

	Net change over 4th quarter 2018	Net change over 3rd quarter 2018	Net change over 2nd quarter 2018	Net change over 1st quarter 2018
Industrial Land	-	-	-0.034	0.02
Storage & Distribution Land	-0.12	0.42	0.003	0.44
Total	-0.12	0.42	-0.031	0.46

Figure 17: Net change in industrial and storage & distribution land over the period (hectares)

Premises available to the market, December 2018

The Planning Service reviews premises and land being marketed for rent and / or sale by the Island's biggest estate agents recording the type of premises and floor space available, the length of time on the market and the take-up of premises[7]. The change since the previous period is shown in each table. Analysis of trends is provided in the Annual Monitoring Reports. There was no land available on the general market for rent or sale for employment uses this period.

OFFICES	Offices to Let	Previous period		Offices for Sale	Previous period	
Number of premises available	113	103	↑	10	11	↓
Total Area (sq ft)	277,418	242,705	↑	41,473	91,892	↓
% of total stock of accommodation (2,658,088 sq ft)	10.4%	8.7%	↑	1.6%	3.3%	↓
% of premises < 250m^2	73%	75%	↓	60%	55%	↑
Number of premises on market > 12 months	50	55	↓	3	3	=
Total Area (sq ft)	138,316	142,234	↓	17,319	17,319	=
Number of premises ceased marketing	22	16	↑	5	0	↑
Total Area (sq ft)	37,340	25,313	↑	72,116	n/a	↑

Figure 17: Office accommodation to let and for sale

INDUSTRY	Industry to Let	Previous period		Industry for Sale	Previous period	
Number of premises available	10	15	↓	1	3	↓
Total Area (sq ft)	38,020	57,919	↓	1,596	18,146	↓
% of total stock of accommodation (2,385,260 sq ft)	1.6%	2.4%	↓	0.07%	0.7%	↓
Number of premises on market > 12 months	9	7	↑	0	1	↓
Total Area (sq ft)	35,114	17,652	↑	n/a	4,550	↓
Number of premises ceased marketing	7	8	↓	2	0	↑
Total Area (sq ft)	26,455	34,601	↓	16,550	n/a	↑

Figure 18: Industrial premises to let and for sale

STORAGE	Storage to Let	Previous period		Storage for Sale	Previous period	
Number of premises available	14	11	↑	2	2	=
Total Area (sq ft)	133,849	34,912	↑	8,175	4,675	↑
% of total stock of accommodation (2,126,587 sq ft)	6.3%	1.6%	↑	0.4	0.2%	↑
Number of premises on market > 12 months	5	6	↓	0	0	=
Total Area (sq ft)	24,524	17,585	↑	n/a	n/a	=
Number of premises ceased marketing	4	4	=	1	0	↑
Total Area (sq ft)	17,049	4,998	↑	800	n/a	↑

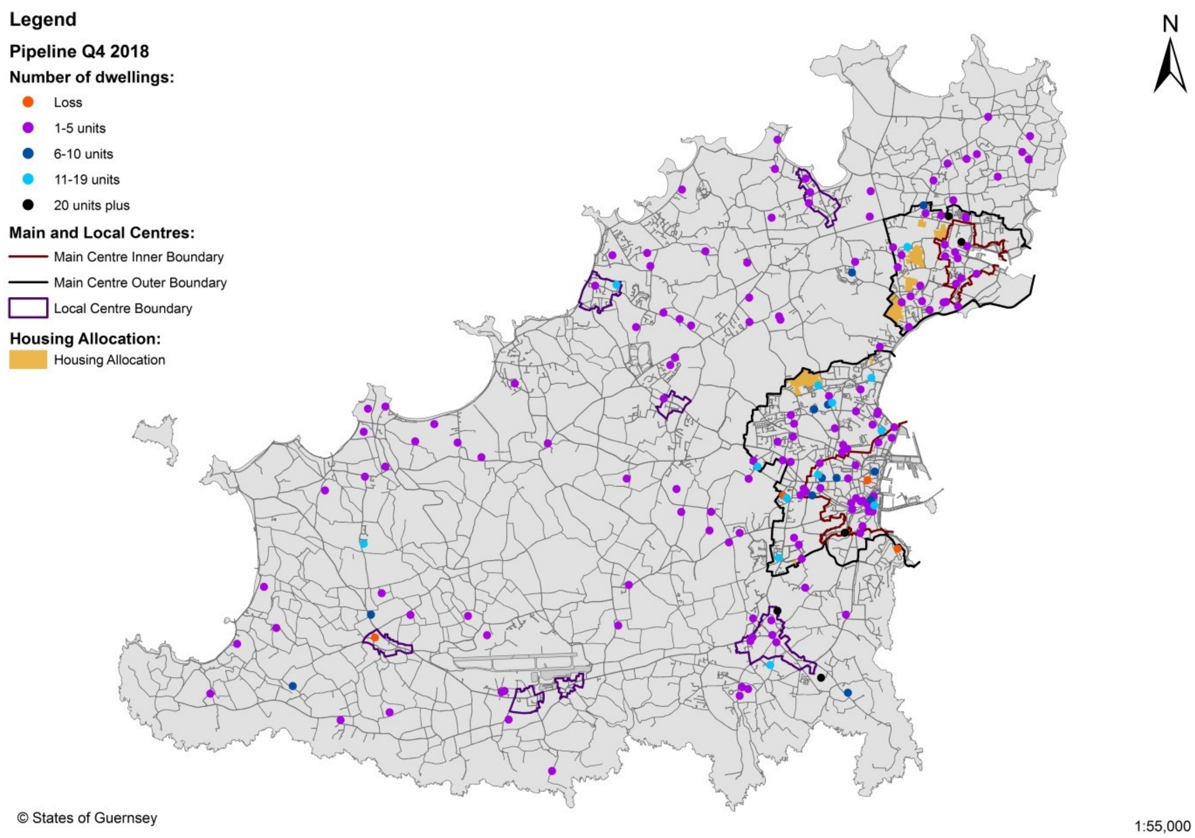
Figure 19: Storage and distribution premises to let and for sale

[7] The Planning Service updates a database every six months by reviewing all relevant estate agents' websites and adding new premises or land available and noting when premises or land already in the database have ceased being marketed. The floorspace is provided by the agents. The total stock of accommodation is provided by Tax on Real Property data obtained from Digimap.

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	60	-	62	122
St Peter Port MCOA	51	16	99	166
St Sampsons / Vale MC	112	-	8	120
St Sampsons / Vale MCOA	32	-	80	112
Total MCs	255	16	249	**520**
Cobo Local Centre	16	-	-	16
Forest Local Centre	-	-	-	-
Forest West Local Centre	-	-	-	-
L'Aumone Local Centre	1	-	-	1
L'Islet Local Centre	3	-	-	3
St Martin's Local Centre	40	-	2	42
St Peter's Local Centre	-1	-	-	-1
Total LCs	59	-	2	**61**
Outside of the Centres	126	-	60	**186**
Total	**440**	**16**	**311**	**767**

MC – Main Centre
MCOA – Main Centre Outer Area



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.