Island Development Plan - Quarterly Monitoring Report

Quarter 4 - 2020

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 housing and employment related development through the planning system. These are of 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 (IDP) 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 SLUP, the IDP ensures that there is a minimum 5 year land supply to meet the annual requirement for new homes to meet the Island's housing needs. This is achieved with the allocation of 15 sites in the IDP specifically for housing development, all within either a Main Centre or Main Centre Outer Area which, combined with an allowance for windfall[1] development on other sites and existing permissions, make up the five year land supply requirement.

The annual requirement for new homes is based on the States' Strategic Housing Indicator. When the IDP was adopted in November 2016, this indicator (then referred to as a 'target') was set at making effective provision for 300 new dwellings each year; the target having been in place since 2002.

In July 2018, the States resolved to agree the States' Strategic Housing Indicator be set at completing 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 completing 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. This represented a shift in the strategic annual housing requirement indicator from numbers of planning permissions for new residential units to numbers of new residential units completed and built. This did not change the requirement for the IDP to put in place policies for the effective provision of the annual housing requirement through planning permissions granted.

The primary purpose of the quarterly housing monitoring is to monitor whether there is a maintained minimum 2-year supply of housing permissions within the 'pipeline' that are able to come forward for development at any one time (known as the pipeline supply) so that effective provision is made to meet the requirements of the strategic indicator. Given the current annual indicator for the completion of 97-157 additional new dwellings per year, the pipeline supply requirement equates to planning permissions for at least 194-314 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.

dwellings (136-230 private market, 58-84 Affordable Housing). 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.

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:

	Number of dwellings			
Source of Supply – Private Market	**Main Centres**	**Local Centres**	**Outside of the Centres**	**Total**
Full permissions (work not commenced)	94	22	76	185
Outline permissions	0	0	0	0
Under Construction	224	15	58	304
Total	**318**	**37**	**134**	**489**
Source of Supply – Affordable Housing				
Full permissions (work not commenced)	0	0	0	0
Outline permissions	0	0	0	0
Under Construction	25	0	26	51
Total	**25**	**0**	**26**	**51**
Pipeline Supply	**540**			

Figure 1: Pipeline Housing Supply

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.

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

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

Site	Dwellings	Decision	Progress	Centre
Rue Du Tertre/La Route Du Braye, Vale (sheltered housing)	47	4/11/14	Under construction	St Sampson / Vale MCOA
Les Blanches, St. Martin (sheltered and affordable housing)	26	27/11/17	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

Figure 2: Largest permissions in the pipeline

The remainder of the pipeline supply is made up of 444 dwellings.

Fourth Quarter 2020 - Permissions

Approvals this quarter

Full planning permission was granted for a total of 60 additional dwellings on 28 sites during the fourth quarter of 2020. This is up 58% on the third quarter of 2020 where 38 new dwellings were granted permission.

The average number of dwellings approved per quarter over the past 3 years was 37 units (not including outline permissions). Therefore this quarter's approvals are above average.

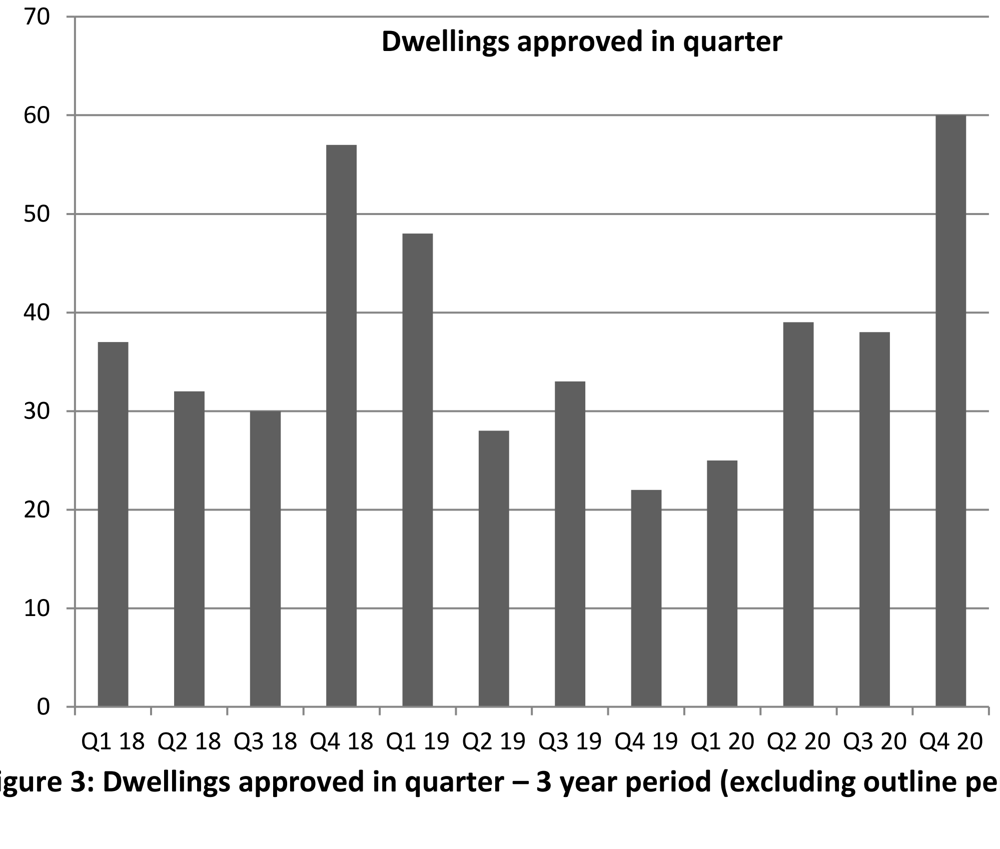


Figure 3: Dwellings approved in quarter – 3 year period (excluding outline permissions)

The largest planning permissions granted this quarter were at Guelles Road, St. Peter Port (erect 8 flats and 5 houses), Tertre Lane, Vale (erect 11 houses) and Les Nicolles, Forest (demolish care home, erect 6 new houses and 8 flats).

Location of Development

The approvals this quarter represent a split of 37 dwellings [62%] in Main Centres, 0 [0%] in Local Centres and 23 [38%] Outside of the Centres.

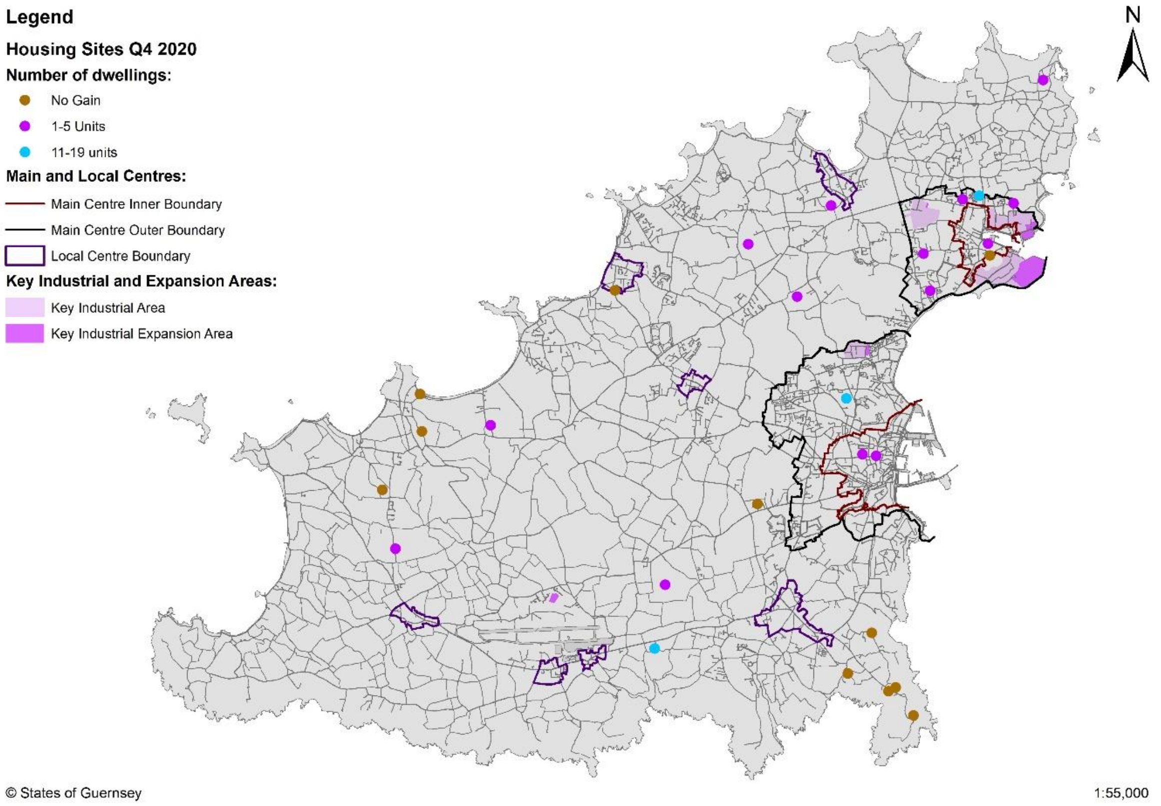


Figure 4: Dwellings approved in quarter

Brownfield / Greenfield development

The IDP 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, these permissions include create 11 dwellings (Tertre Lane, Vale) in the Bridge Main Centre Outer Area, demolish an outbuilding and erect a dwelling (Route Des Clos Landais, St. Saviour), subdivide and convert

a vinery building to create 2 dwellings (La Route De La Lande, Vale) and convert and extend a packing shed to 3 dwellings (Les Canus, St. Sampson), all Outside of the Centres. Also 15 dwellings were permitted on part greenfield sites this quarter, these permissions include erect 8 flats and 5 houses (Guelles Road, St. Peter Port) in the Town Main Centre Outer Area, demolish and rebuild a dwelling (La Rue Du Hamel, Castel), convert an outbuilding to create a dwelling (Les Rouvets Road, Vale) and convert a packing shed to a dwelling (Les Salines Road, St. Sampson), all Outside of the Centres.

Types of development and dwellings permitted

The types of development and dwellings permitted (net) 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	4	13	8	0	0	25
Re-develop	2	8	8	0	0	18
Sub-division	0	0	0	1	0	1
Conversion	3	6	7	0	0	16
Loss of units	0	0	0	0	0	0
Total	9	27	23	1	0	**60**

Figure 5: Types of development and dwellings permitted

The numbers of dwellings shown in Figure 5 relates to the net number of new 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. 75 new dwellings will replace 15 dwellings as shown Figure 7, giving the net figure of 60 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	0	4	4	10	0	18
Semi-detached	1	8	10	0	0	19
Terraced	0	7	5	0	0	12
Flat	5	13	5	0	1	24
Sheltered	2	0	0	0		2
Total	8	32	24	10	1	**75**

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:

[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.

	Number of bedrooms - Replaced Dwellings					
Unit type	**1**	**2**	**3**	**4+**	**HMO**	**Total**
Detached	1	0	6	3	1	11
Semi-detached	0	0	2	0	0	2
Terraced	0	0	0	0	0	0
Flat	0	0	1	0	0	1
Sheltered	0	0	1	0		**1**
Total	1	0	10	3	1	**15**

Figure 7: Size and type of dwellings to be replaced by the 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 Housing[4]

IDP 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 and no other affordable housing was permitted.

To date, under the IDP, 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, 57 Affordable Housing units have been permitted under other IDP 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 32 (26 private market, 6 Affordable Housing). This is 9% of the total number of dwellings

[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.

under construction (355). Figure 8 shows that the total number of dwellings completed construction this quarter is 19 (2 private market, 17 Affordable Housing).

	Commencements Private		Commencements Affordable		Completions Private		Completions Affordable	
	Sites	Units	Sites	Units	Sites	Units	Sites	Units
Main Centres	6	12	1	6	1	1	-	-
Local Centres	1	9	-	-	1	1	-	-
Outside Centres	9	5	-	-	1	0	1	17
Total	**16**	**26**	**1**	**6**	**3**	**2**	**1**	**17**
Running total since IDP adoption	**203**	**376**	**12**	**167**	**127**	**291**	**12**	**149**

Figure 8: Developments commencing and completing during the quarter

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

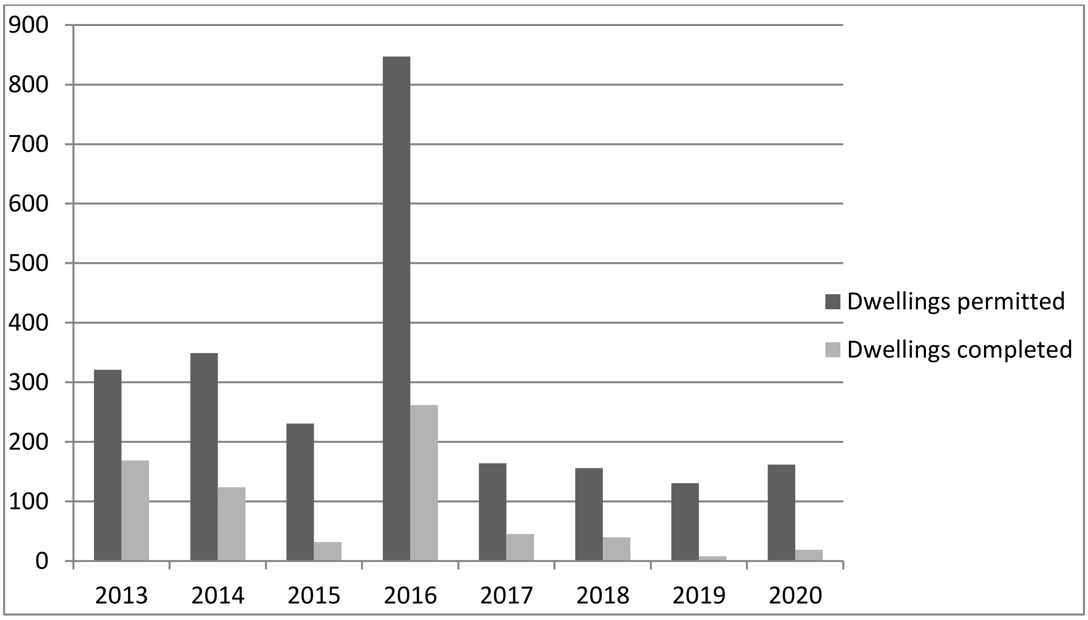


Figure 9: Dwellings permitted (net) and dwellings completed from the permissions in each year (2013 to date)

Delivery of housing – Source of the supply

In accordance with the requirements of the Strategic Land Use Plan the IDP identifies a minimum five year land supply for housing. At the time the IDP 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.

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 540 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	Draft Development Framework published		
Bougourd Ford	Development Framework adopted		
Braye Lodge	Development Framework adopted		
Cleveleys Vinery	Development Framework adopted		
Education offices	Development Framework adopted		
Priaulx Garage	Development completed		19
Franc Fief	None		
King's Club	Under construction		13
La Vrangue	Permissions 2019 (Vrangue Manor) and 2020 (Route De La Ramee) - not part of the main site for future development	1	5
Les Bas Courtils	Development Framework adopted Permission (house / barn) 2017 – lapsed		
Maurepas Road	Permission 2018		6
Petites Fontaines	Permission 2016 – lapsed		
Pointues Rocques	Development Framework adopted		
Saltpans	Development Framework adopted		

Warry's Bakery	Development completed		20
	Total units (net) permitted on allocations		**63**

Figure 10: Progress of housing site allocations

This quarter no additional dwellings were permitted on an allocated housing site. To date 63 dwellings have been permitted on allocated sites. Remaining supply from allocated sites is therefore c.655 dwellings. 24 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 60 dwellings were permitted on windfall sites. To date since the adoption of the IDP 584 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 as part of the review of the IDP.

Housing supply

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

Source of housing supply	Q4 2020	Q3 2020	Q2 2020
Dwellings with permission / under construction	540	526	530
Remaining capacity on allocated sites	655	655	656
Windfall allowance	150-300	150-300	150-300
Total (with full windfall allowance)	1495	1481	1486
Years supply[6] (based on 97-157 dwellings per annum, (with full windfall allowance))	9.5-15.4	9.4-15.3	9.5-15.3

Figure 11: Source of housing supply

[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.

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 2020 which were approved in the fourth quarter of 2017.

During this quarter, 4 full planning permissions (5 dwellings) lapsed without being taken up for development – see Figure 12 below. This represents 6.8% of the 74 full planning permissions granted in 2017. 48 of these permissions have been taken-up, the remaining permissions have been revised at a later date.

Location	Lapsed Permissions Q4 2020	Lapsed Permissions 2017	Lapsed Dwellings Q4 2020	Lapsed Dwellings 2017
Main Centres	3	8	4	19
Local Centres	0	1	0	2
Outside of the Centres	1	10	2	9
Total	**4**	**18**	**5**	**28**

Figure 12: Permissions lapsing during the quarter and 2017
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 (IDP) 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 2020 and 31st December 2020 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	386	-536		465						**315**
Local Centres										
Outside of the Centres		103								**103**
TOTAL	**386**	**-433**		**465**						**418**

Figure 13: Net change in floor space (m^2) by Use Class granted planning consent between October-December 2020

In summary, offices - net total of -47m^2 permitted; storage or distribution - net total of 465m^2 permitted; industry - net total of 0m^2 permitted.

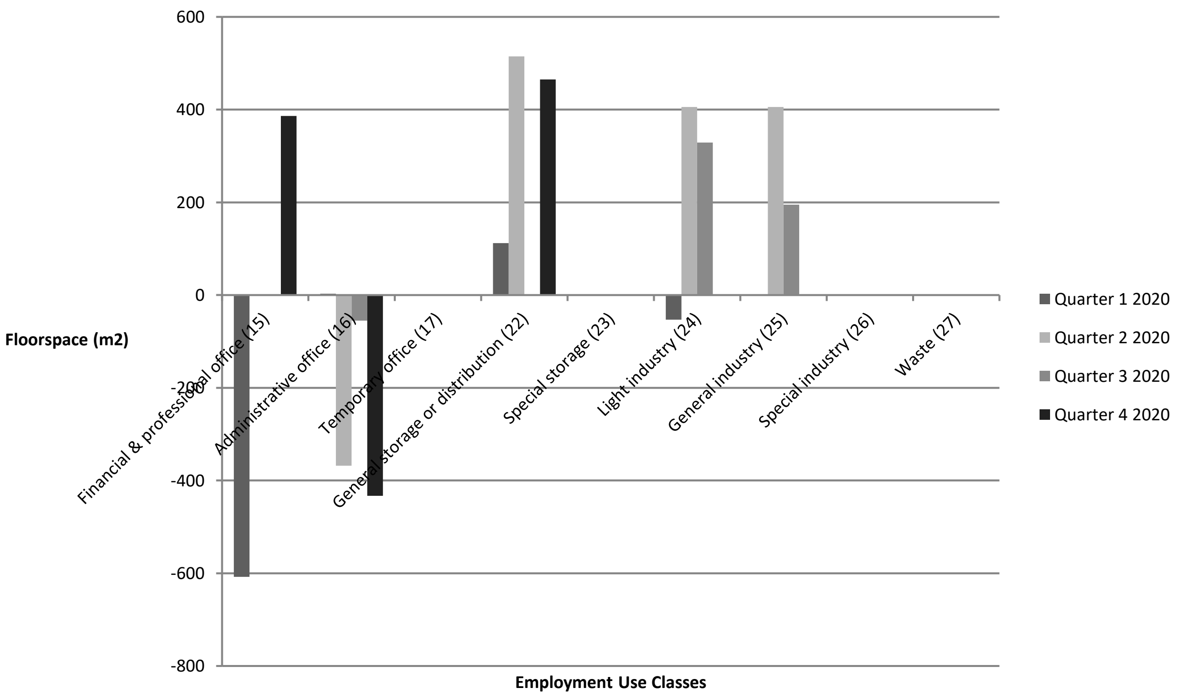


Figure 14: Employment floorspace approved

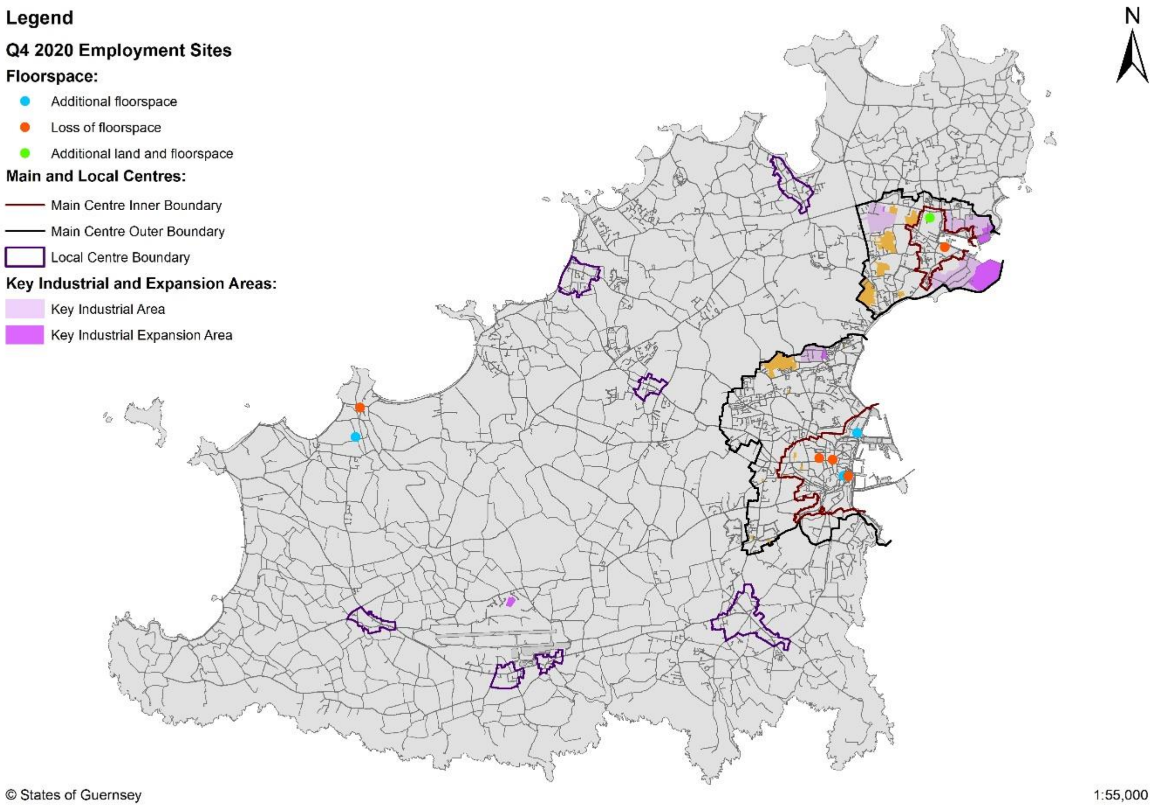


Figure 15: Employment sites approved in quarter

There were 10 permissions granted in the quarter that included a change in floorspace:

- 8 permissions were in Main Centres: 3 permissions were to change use of offices to residential. 1 permission was to change use of an office to a dental surgery. 1 permission was to change use of an office to part of an adjoining restaurant. 1 permission was to change use of a restaurant to estate agents. 1 permission was to change use from retail to storage and distribution. 1 permission was to change use from retail to office.
- There were no permissions in Local Centres
- 2 permissions were Outside of the Centres: 1 permission was to change use from IT service and support business to office. 1 permission was to change use from office to opticians practice.

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 2020	Change over 3rd quarter 2020	Change over 2nd quarter 2020	Change over 1st quarter 2020
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 0.0836ha of land was given permission for an industrial or storage or distribution use. This compares with a gain of 0.2ha in the previous quarter. The sites added / lost from the supply of industrial or storage or distribution land were:

- Change of use from retail to storage and distribution at Lowlands Industrial Estate, Vale (0.0836ha).

	Net change over 4th quarter 2020	Net change over 3rd quarter 2020	Net change over 2nd quarter 2020	Net change over 1st quarter 2020
Industrial Land	0	-0.01	0.031	0.06
Storage & Distribution Land	0.0836	0.21	0.031	0.216
Total	0.0836	0.2	0.062	0.276

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

Premises available to the market, December 2020

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	92	93	↓	12	11	↑
↳ Total Area (sq ft)	268,861	254,588	↑	76,854	33,400	↑
% of total stock of accommodation (2,907,612 sq ft)	9.2%	9.2%	=	2.6%	1.2%	↑
% of premises < $250m^2$	68.5%	66.7%	↑	50.0%	54.5%	↓
Number of premises on market > 12 months	32	40	↓	4	3	↑
↳ Total Area (sq ft)	85,153	79,362	↑	14,962	10,344	↑
Number of premises ceased marketing	21	32	↓	5	5	=
↳ Total Area (sq ft)	59,330	68,685	↓	19,559	20,146	↓

Figure 17: Office accommodation to let and for sale

INDUSTRY	Industry to Let	Previous period		Industry for Sale	Previous period	
Number of premises available	4	7	↓	2	2	=
↳ Total Area (sq ft)	13,497	23,325	↓	7,390	8,299	↓
% of total stock of accommodation (2,310,850 sq ft)	0.6%	1%	↓	0.3%	0.4%	↓
Number of premises on market > 12 months	3	3	=	0	0	=
↳ Total Area (sq ft)	6,941	6,989	↓	n/a	n/a	=
Number of premises ceased marketing	4	2	↑	1	0	↑
↳ Total Area (sq ft)	11,792	10,023	↑	2,619	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	10	14	↓	1	1	=
↳ Total Area (sq ft)	92,451	137,951	↓	39,826	3,875	↑
% of total stock of accommodation (2,091,955 sq ft)	4.4%	6.8%	↓	1.9%	0.2%	↑
Number of premises on market > 12 months	3	5	↓	0	1	↓
↳ Total Area (sq ft)	53,338	85,918	↓	n/a	3,875	↓
Number of premises ceased marketing	6	3	↑	1	0	↑
↳ Total Area (sq ft)	50,933	11,123	↑	3875	n/a	↑

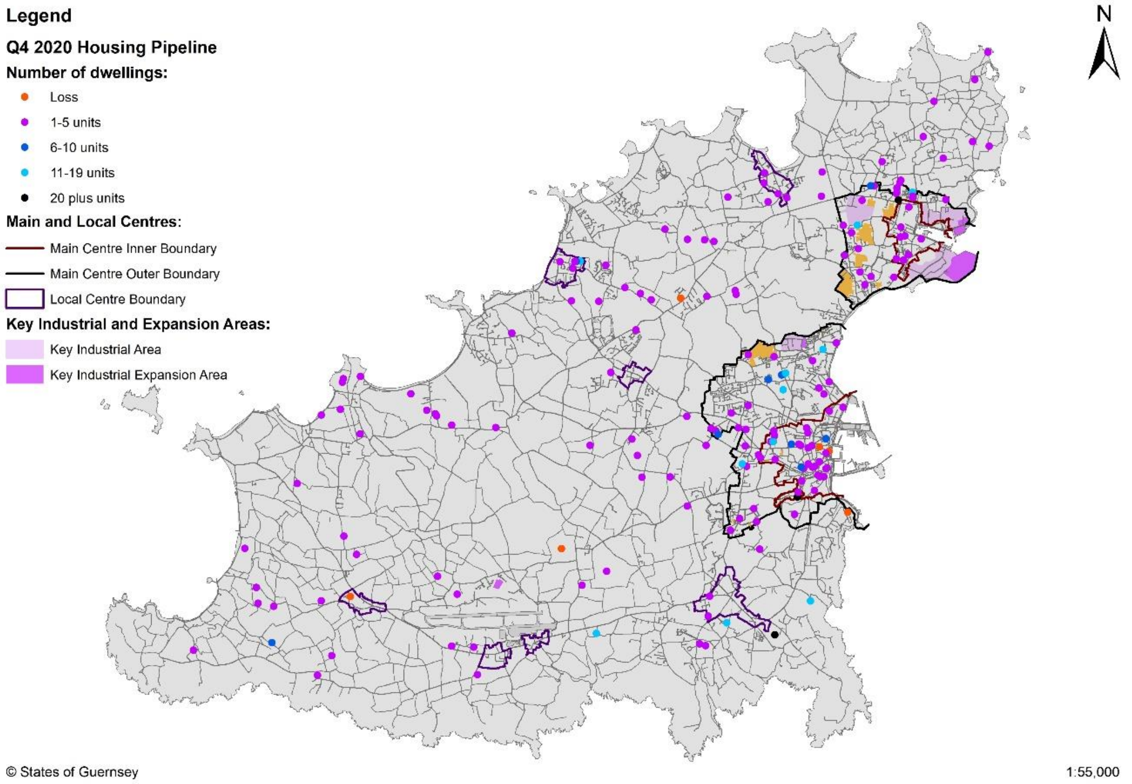
Figure 19: Storage and distribution premises to let and for sale

[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		
	PM	AH	PM	AH	PM	AH	
St Peter Port MC	32	-	-	-	75	-	107
St Peter Port MCOA	40	-	-	-	66	6	112
St Sampson / Vale MC	3	-	-	-	6	-	9
St Sampson / Vale MCOA	19	-	-	-	77	19	115
Total MCs	94	-	-	-	224	25	**343**
Cobo Local Centre	7	-	-	-	22	-	29
Forest Local Centre	-	-	-	-	-	-	-
Forest West Local Centre	-	-	-	-	-	-	-
L'Aumone Local Centre	-	-	-	-	-	-	-
L'Islet Local Centre	6	-	-	-	-	-	6
St Martin's Local Centre	3	-	-	-	-	-	3
St Peter's Local Centre	-1	-	-	-	-	-	-1
Total LCs	22		-	-	15	-	**37**
Outside of the Centres	76	-	-	-	58	26	**160**
Total	**192**	**-**	**-**	**-**	**297**	**51**	**540**

MC – Main Centre
MCOA – Main Centre Outer Area
PM – Private Market
AH – Affordable Housing



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

Have you visited our website? Go to www.gov.gg/planningandbuilding for monitoring reports, the Island Development Plan, technical reports, guidance material and other planning information, including how to obtain pre-application advice and how to submit a planning application.

Copies of the text of the Island Development Plan (2016) are available from the Planning Service. Copies of legislation are available from the Greffe. Electronic copies are also available at www.guernseylegalresources.gg