ENVIRONMENT
A STATES OF GUERNSEY GOVERNMENT DEPARTMENT

Housing Monitoring Report

Third Quarter of 2013 (July-September)

For Information

Introduction
The primary purpose of the quarterly Housing Monitoring Report is to monitor whether a two year supply of housing is being maintained in accordance with Policy HO1 of the Urban Area Plan. In addition other statistics are presented to provide a more in depth analysis of the source and spatial distribution of new dwellings and the take up of planning permissions.

This monitoring report refers to the net change in new dwellings. For example, a scheme to demolish one house and replace it with five flats is counted as +4 dwellings and a scheme to demolish a house and replace it with another house involves no net gain in dwellings and is counted as 0. A dwelling is defined as a self contained unit of accommodation, i.e. where the dwelling is designed for the occupants to share the kitchen, bathrooms and living rooms.

Approvals to date (running totals)

Policy HO1 in the Urban Area Plan requires the Environment Department to ensure that a two-year housing supply is ‘effectively available for housing development’ at any one time. Given the current annual target of 300 additional new dwellings per year, this equates to 600 new dwellings.

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

Full permits (work not commenced): 384 dwellings (292 urban / 92 rural)

Outline permissions: 23 (23 urban / 0 rural)

Under Construction: 285 (222 urban / 63 rural)

Effective Housing Supply: 692 additional dwellings (537 urban, 155 rural) are under construction or have some form of permission, representing an increase in the 2 years’ housing supply from the previous quarter. The current housing supply represents a 78/22% split between the supply arising from urban and rural areas, respectively.

With the approval of an outline planning application this quarter, there are now currently 3 extant outline planning permissions, one for 19 dwellings at Channel Island Tyres on La Charroterie, St. Peter Port, one for 4 dwellings at Admiral Park, St Peter Port and the other for a replacement dwelling in St Martin’s.

41% of the pipeline is under construction. This is in comparison to 46% in quarter 3 in 2012. Comparison with other jurisdictions in this respect is not always easy due to different ways in which data is collected and the frequency at which it is reported. However a number of UK local authorities also monitor the percentage of their pipeline under construction.

Chiltern District Council	March 2012	48%
Cotswold District Council	2010	17%
St Albans	April 2010	36%
North Norfolk	March 2012	35%

The Parishes

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

Parish	Dwellings upon which work has not yet started (a) All types incl. outline permissions	(b) Permits alone (PMT+COU)	Units under construction (c)	**Total Units (a) + (c) "Pipeline figure"**
St Peter Port	278	255	196	**474**
St Sampson's	41	41	18	**59**
Vale	24	24	32	**56**
Câtel	15	15	25	**40**
St Martin's	26	26	3	**29**
St Saviour's	8	8	1	**9**
Forest	6	6	1	**7**
Torteval	0	0	2	**2**
St Andrew's	5	5	0	**5**
St Peter's	4	4	7	**11**
TOTAL	**407**	**384**	**285**	**692**

Figure 1: Planning permissions for new dwellings by Parish

Third Quarter Statistics 2013

Approvals this quarter

Full permits were issued for a total of 108 additional dwellings and outline permission was given for four dwellings at Admiral Park, St Peter Port during the third quarter of 2013. This represents a split of 70 [65%] in the urban area and 38 [35%] in the rural area.

The average approvals per quarter over the past 3 years was 76 units. Therefore this quarter's approvals are above average. The largest permission was for 10 dwellings at Les Petites Fontaines, St Peter Port.

The sources of dwellings arising from this quarter's permissions are as follows:

	Urban area	Rural area	Total
New build	21	0	21
Re-development	44	13	57
Sub-division	4	2	6
Conversion	1	23	24
Loss of units	0	0	0
Total	70	38	108

Figure 2: Full planning permissions for new dwellings given this quarter by area and source

Brownfield / Greenfield development

The Urban Area Plan and Rural Area Plan only allow the development of greenfield sites in exceptional circumstances, therefore approvals on greenfield sites are closely monitored.

0 dwellings were permitted on greenfield sites this quarter.

Long Term Trends

Urban/Rural development

Whilst the Urban Area Plan makes provision for 90% of the housing requirement to come forward in the urban area, this is not to be interpreted as a target. However, it is useful to monitor the balance of provision between the urban and rural areas. The percentage of dwellings approved in the urban area is recorded below. It is noticeable that since 2000 the proportion of new dwellings within the urban area is higher than the preceding 8 years. 2010 is an anomaly due to the number of dwellings demolished at the Bouet, St. Peter Port.

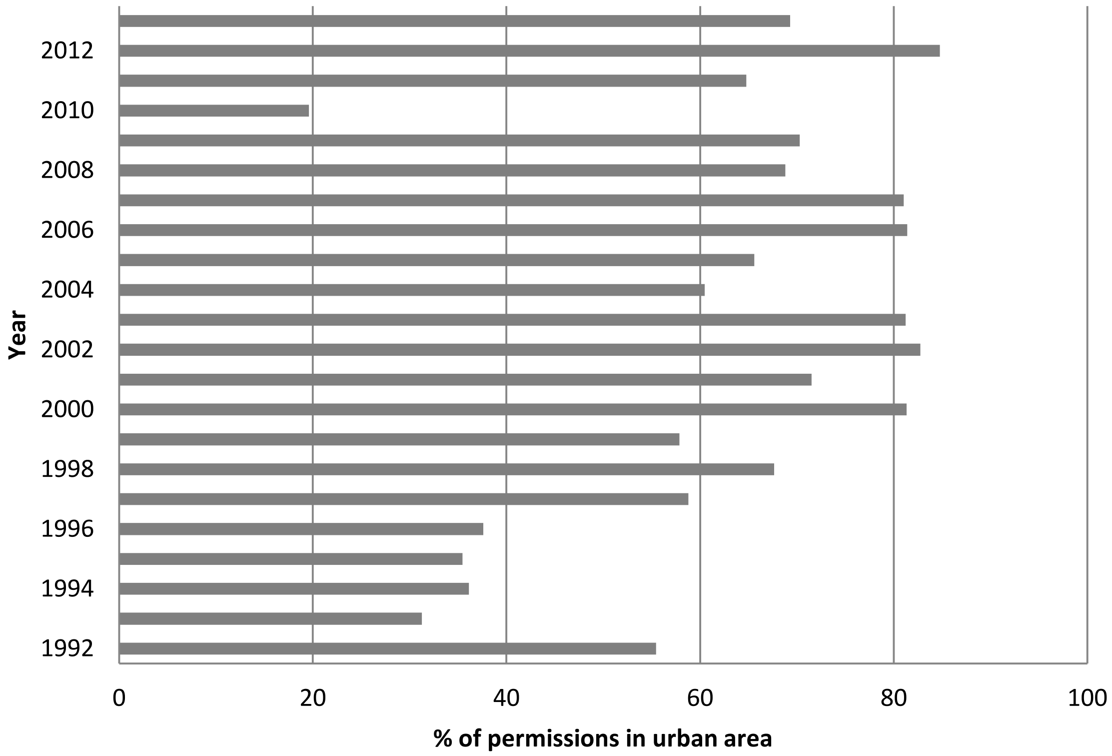


Figure 3: Percentage of planning permissions for new dwellings given in the urban area

Take up of permissions and completions

Whilst the housing supply requirement in the UAP relates only to the number of permissions granted, it is also useful to monitor how many of these permissions get built (are taken up) and the rate of take up over the 3 year life of permissions. As occurs elsewhere, a small percentage of permissions never come to fruition. This can be for a variety of reasons, such as difficulty accessing finance, a change in the market or as is often the case mainly due to the permissions being superseded by newer slightly different applications for the same site. There is also a delay between planning permissions being granted and ability to put a spade in the ground due to the requirement for other consents, completing negotiations or legal drafting or simply awaiting the availability of a builder. Monitoring this rate of take up trend informs the nature of pipeline supply and how many dwellings this is likely to result in on the ground. This information is available for a 21 year period and is shown in Figure 4. It shows that after 1 year of being granted permission approximately a third of applications for residential development are taken up, after 2 years approximately half of applications are taken up and after 3 years over three quarters of applications are taken up.

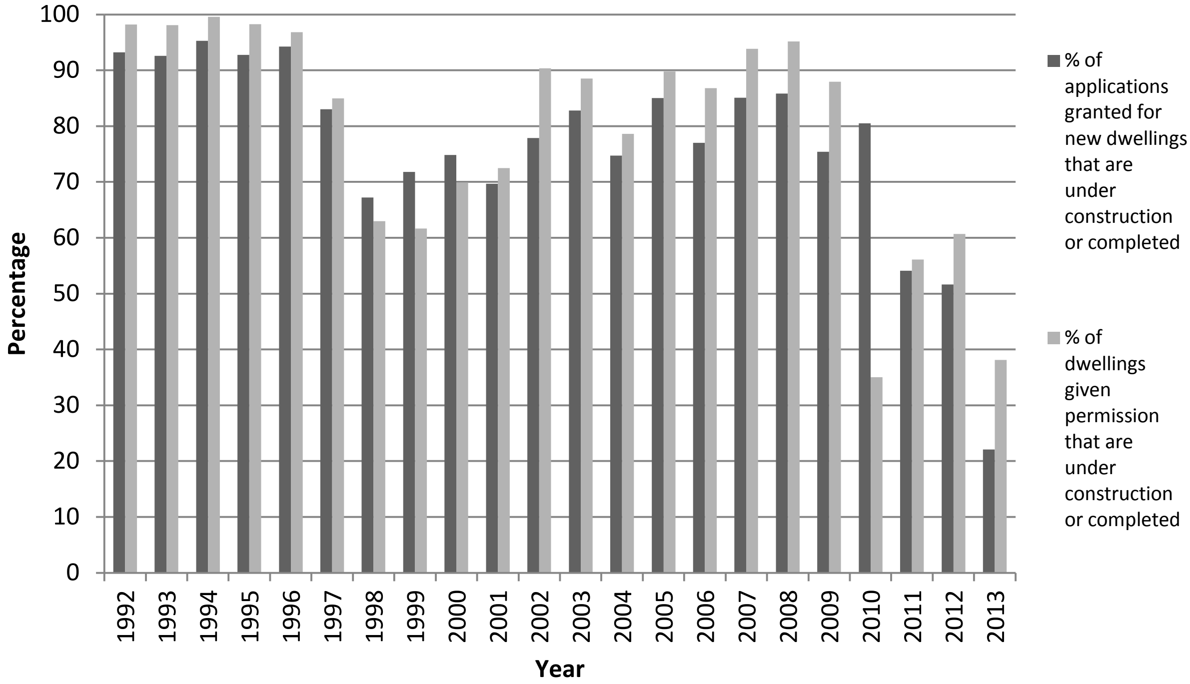


Figure 4: Monitoring what proportion of dwellings permitted get built

Figure 5 sets out the number of dwellings that were approved in the given year (column 2) and how many of those have been constructed or are under construction (column 3) (i.e. it does not relate to the year in which they were built). Column 4 sets out the percentage of dwellings that have been built as a proportion of the total number of dwellings granted permission. For example, of the 592 additional dwellings given permission in 2000, 416 of those are under construction or have been constructed. Because developers are given 3 years in which to start development once planning permission has been granted, the figures for 2010 onwards are the totals to date.

Year	No. of dwellings approved in the given year	No of dwellings constructed or under construction from the applications granted in the given year	% dwellings take up as a proportion of the total no. of dwellings granted permission
2000	595	416	70
2001	502	364	73
2002	551	498	91
2003	239	231	97
2004	215	169	79
2005	157	141	90
2006	258	224	87
2007	195	184	94
2008	186	177	95
2009	249	219	88
2010	97	34*	35*
2011	230	129	56
2012	361	219	61
2013	215	82	38
Total	4084	3086	76

Figure 5: Proportion of dwellings given planning permission that get built

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

It is also of interest to note the proportion of planning permissions for new residential development which are implemented. This is set out in the table below.

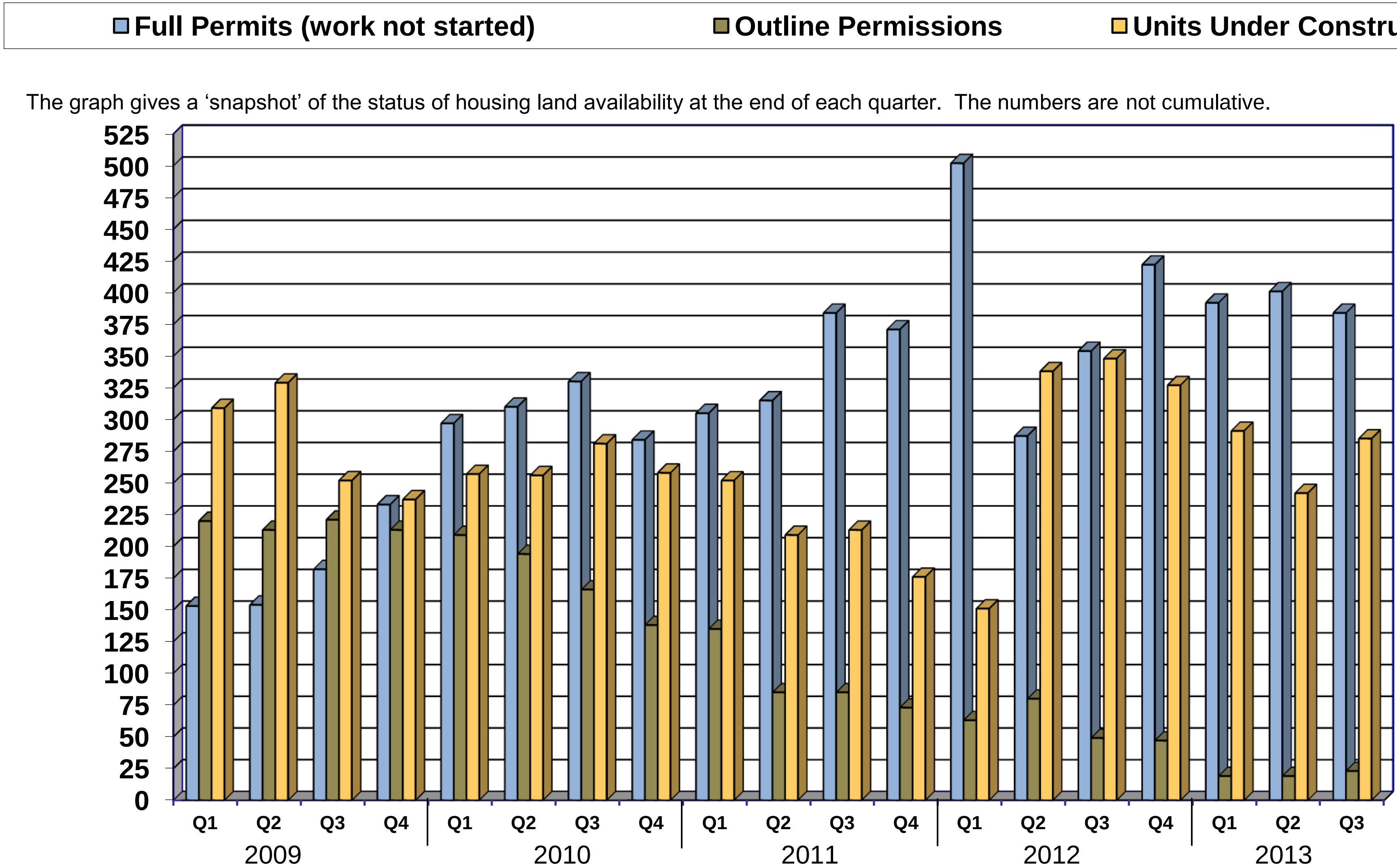
Year	No. of planning permissions involving new dwellings	No. of planning permissions that have been implemented from the permissions given in that year	% applications granted for new dwellings that have been implemented
2000	159	118	75
2001	221	154	70
2002	167	130	78
2003	129	106	82
2004	162	121	75
2005	127	108	85
2006	126	97	77
2007	87	75	86
2008	99	85	86
2009	126	94	75
2010	118	95	81
2011	122	66	54
2012	120	62	52
2013	95	20	22
Total	1858	1333	72

Figure 6: Proportion of planning applications consented for dwellings that get implemented

Housing Land Availability - (Figures based on Environment Department's Housing Database)

	Approvals during period					Running totals at end of period				
				Area						
	Full Permits	Outline consents	**Total**	Urban	Rural	Full Permits & COU NOT Started	Outline consents	**Total** Not Started	Units under Construction	***Grand Total*** *(Potential housing stock)*
2010										
Jan-March	90	6	**96**	40	56	297	209	**506**	257	**763**
April-June	37	5	**42**	34	8	310	194	**504**	256	**760**
July-Sept	58	2	**60**	49	11	330	166	**496**	281	**777**
Oct-Dec	69	1	**70**	59	11	284	138	**422**	258	**680**
Total for 2010	***254***	***14***	***268***	***182***	***86***	***284***	***138***	***422***	***258***	***680***
2011										
Jan-March	34	0	**34**	28	6	305	135	**440**	252	**692**
April-June	63	0	**63**	25	38	315	85	**400**	209	**609**
July-Sept	78	0	**78**	41	37	384	85	**469**	213	**682**
Oct-Dec	67	0	**67**	55	12	371	73	**444**	176	**620**
Total for 2011	***242***	***0***	***242***	***149***	***93***	***371***	***73***	***444***	***176***	***620***
2012										
Jan-March	146	1	**147**	143	3	502	63	**565**	151	**716**
April-June	43	19	**62**	48	14	287	80	**367**	338	**705**
July-Sept	86	0	**86**	82	4	354	49	**403**	348	**751**
Oct-Dec	105	0	**105**	59	46	422	47	**469**	327	**796**
Total for 2012	***380***	***20***	***400***	***332***	***67***	***422***	***47***	***469***	***327***	***796***
2013										
Jan-March	51	0	**51**	36	15	392	19	**411**	291	**702**
April-June	72	0	**72**	59	13	401	19	**420**	242	**662**
July-Sept	108	4	**112**	70	38	384	23	**407**	285	**692**
Oct-Dec										
Total for 2013										

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



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