ENVIRONMENT
A STATES OF GUERNSEY GOVERNMENT DEPARTMENT

Housing Monitoring Report

Third Quarter of 2014 (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 dwellings in the pipeline this quarter:

Full permits (work not commenced): 440 dwellings (280 urban / 160 rural)

Outline permissions: 26 dwellings (23 urban / 3 rural)

Under Construction: 312 (233 urban / 79 rural)

Effective Housing Supply: 778 additional dwellings (536 urban, 242 rural) are under construction or have some form of permission, representing a decrease in the 2 years' housing supply from the previous quarter. The current housing supply represents a 69/31% split between the supply arising from urban and rural areas, respectively.

There remain 4 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; a third for a replacement dwelling in St Martin's, and; lastly, a development for three dwellings at Rue de la Cort, St Martin's.

40% of the pipeline is under construction. This is in comparison to 41% in quarter 3 of 2013. Comparison with other jurisdictions in this respect is not always easy due to different ways in which data is collected and the frequency at which it is reported. However a number of other local authorities also monitor the percentage of their pipeline under construction and some of these figures are shown below.

Jersey	January 2012	26%
Chiltern District Council	March 2013	30%
North Norfolk	March 2013	39%

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	284	261	178	**462**
St Sampson's	28	28	35	**63**
Vale	33	33	45	**78**
Câtel	34	34	20	**54**
St Martin's	60	57	20	**80**
St Saviour's	12	12	1	**13**
Forest	4	4	5	**9**
Torteval	0	0	1	**1**
St Andrew's	7	7	0	**7**
St Peter's	4	4	7	**11**
TOTAL	**466**	**440**	**312**	**778**

Figure 1: Planning permissions for new dwellings by Parish

Third Quarter Statistics 2014

Approvals this quarter

Full planning permission was granted for a total of 85 additional dwellings during the third quarter of 2014. During that quarter, outline permission was granted for 0 dwellings. This represents a split of 76 [89%] in the urban area and 9 [11%] in the rural area. The largest permission was granted for 14 dwellings at Upham's Yard, Les Amballes, St Peter Port. Permission was also granted for revisions to developments at the Red Lion Hotel site, Le Grand Bouet/Les Banques, St Sampson's (an increase of 1 dwelling, taking the total to 16) and at the Salerie Corner site, Salter Street, St Peter Port (no increase in dwellings, total remains at 12). The latter two developments contribute to the relatively high figure for 're-development' of sites set out in Figure 2, below.

The average number of dwellings approved per quarter over the past 3 years was 78 units. Therefore this quarter's approvals are above average. No units were lost this quarter. A net increase of 47 dwellings occurred through redevelopment during this quarter, slightly above the trend of the past three years where the average was 42 dwellings approved through redevelopment-type proposals.

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

	Urban area	Rural area	Total
New build	23	0	23
Re-development	47	0	47
Sub-division	0	5	5
Conversion	6	4	10
Loss of units	0	0	0
Total	76	9	85

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.

Appeal decisions

For completeness, from 2014 the number of dwellings permitted through applications allowed following appeal decisions have been incorporated.

Two new dwellings were allowed on appeal this quarter, through conversion of a packing shed at Beecholme, La Biloterie, St Saviour's.

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 third quarter of 2014 which were approved in the third quarter of 2011.

During this quarter, 11 full permissions lapsed without being taken up for development. This equates to a total of 18 dwellings with a split of 5 permissions [45%] (13 dwellings, 72%) in the urban area and 6 permissions [55%] (5 dwellings, 28%) in the rural area.

Figure 3 shows that the majority of lapsed permissions related to conversion of buildings for residential use. The majority of dwellings which would have otherwise been built had the permission been taken up are redevelopments. However, redevelopment 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 will not necessarily reflect the number of permissions lapsing.

	Permissions	Permissions %	Dwellings	Dwellings %
Conversion	5	46	5	28
New Build	2	18	4	22
Redevelopment	3	27	7	39
Subdivision	1	9	2	11
Loss of units	0	0	0	0
Total	11	100	18	100

Figure 3: Planning permissions and dwellings lapsed this quarter, by house form

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 generally higher than the preceding years. 2010 is an anomaly due to the number of dwellings demolished at the Bouet, St. Peter Port.

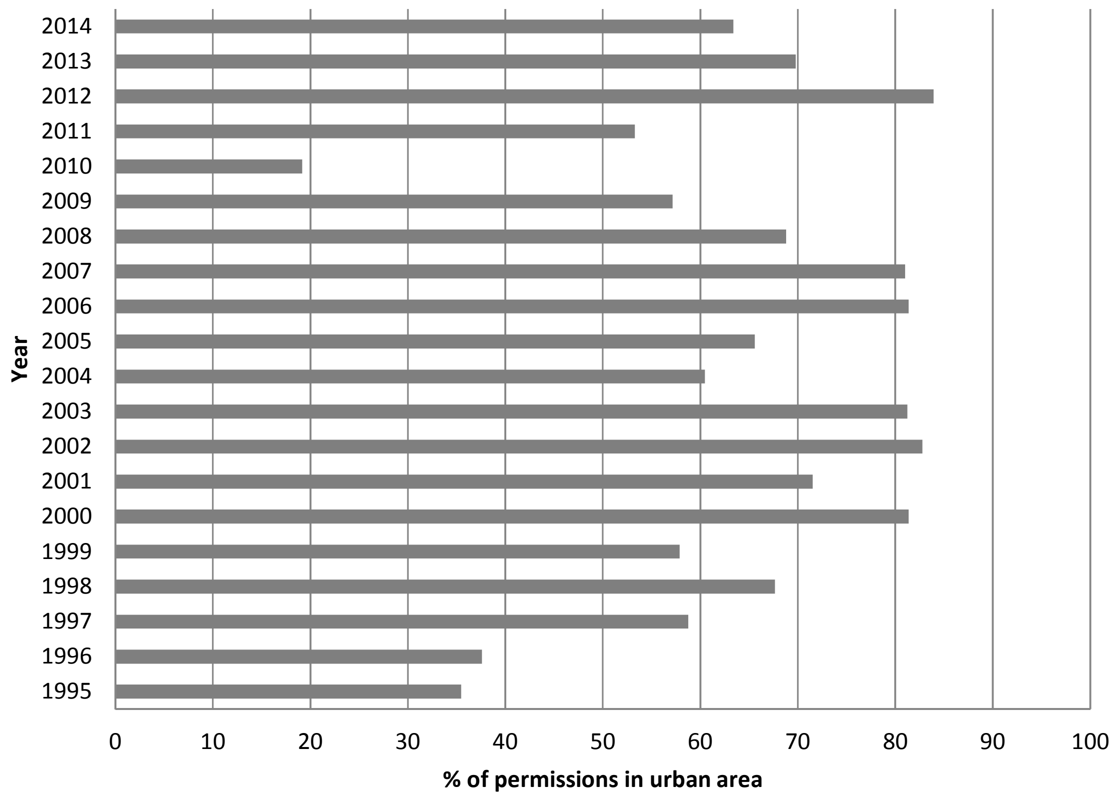

Figure 4: Percentage of planning permissions for new dwellings given in the urban area

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 well as some permissions not being taken up, there is also a delay between planning permissions being granted and ability to put a spade in the ground due to the requirement for other consents, completing negotiations or legal drafting or simply awaiting the availability of a builder. Monitoring this rate of take up trend informs the nature of pipeline supply and how many dwellings this is likely to result in on the ground. This information is available for a 22 year period, but for ease of presentation only information since 1996 is shown in Figure 5. It shows that after 1 year of being granted planning permission approximately a third of permissions for residential development are taken up, after 2 years approximately half of permissions are taken up and after 3 years over three quarters of permissions are taken up.

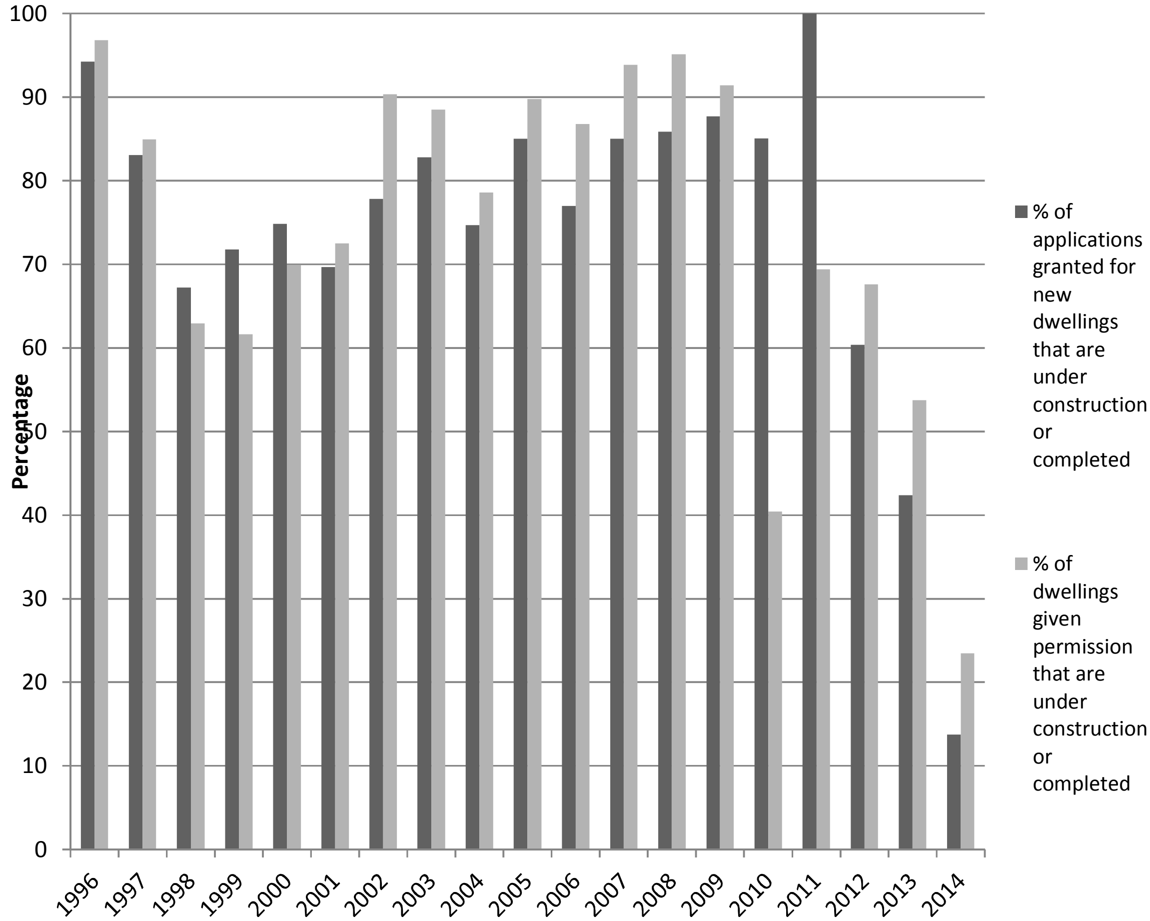

Figure 5: Monitoring what proportion of dwellings permitted get built

Figure 6 sets out the number of dwellings that were approved in the given year (column 2) and how many of those have been constructed or are under construction (column 3) (i.e. it does not relate to the year in which they were built). Column 4 sets out the percentage of dwellings that have been built as a proportion of the total number of dwellings granted permission. For example, of the 249 additional dwellings given permission in 2009, 219 of those are under construction or have been constructed. Because developers are given 3 years in which to start development once planning permission has been granted, the figures in columns 3 and 4 for 2011 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
2005	157	141	90
2006	258	224	87
2007	195	184	94
2008	186	177	95
2009	249	219	88
2010	97*	38*	39
2011	304	211	69
2012	349	236	68
2013	268	144	54
2014	243	57	23
10 yr total	**2306**	**1631**	**71**

Figure 6: Proportion of dwellings given planning permission that get built

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

It is also of interest to note the proportion of planning permissions for new residential development which are implemented. This is set out in the table below. Again, because developers are given 3 years in which to start development once planning permission has been granted, the figures for 2011 onwards are the totals to date.

Year	No. of planning permissions involving new dwellings	No. of planning permissions that have been implemented from the permissions given in that year	% applications granted for new dwellings that have been implemented
2005	127	108	85
2006	126	97	77
2007	87	75	86
2008	99	85	86
2009	126	94	75
2010	118	97	85
2011	122	110	90
2012	116	70	60
2013	118	50	42
2014	80	11	14
10 yr total	**1119**	**797**	**71**

Figure 7: Proportion of planning applications consented for dwellings that get implemented

Lapsed permissions

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

Monitoring of this information commenced in 2014.

During 2014, to date, 25 full permissions (including 1 change of use permission) lapsed without being taken up for development. Of the total planning permissions granted in 2011, 25 [20%] have lapsed in 2014. This equates to a total of 36 dwellings, with a split of 28 dwellings [78%] in the urban area and 8 dwellings [22%] in the rural area, and is 12% of the dwellings approved in 2011.

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

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

	Dwellings approved during period					*Running totals at end of period*				
	Full Permits	Outline consents	**Total**	Area Urban	Rural	Full Permits & COU NOT Started	Outline consents	**Total** Not Started	Units under Construction	***Total*** *(Potential housing stock)*
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**	74	38	384	23	**407**	285	**692**
Oct-Dec	86	0	**86**	60	26	377	23	**400**	336	**736**
Total for 2013	***317***	***4***	***321***	***229***	***92***	***377***	***23***	***400***	***336***	***736***
2014										
Jan-March	68	3	**71**	25	46	410	26	**436**	343	**779**
April-June	98	0	**98**	61	37	472	26	**498**	332	**830**
July-Sept	85	0	**85**	87	9	440	26	**466**	312	**778**
Oct-Dec										
Total for 2014										

- 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.