ENVIRONMENT
A STATES OF GUERNSEY GOVERNMENT DEPARTMENT

Housing Monitoring Report

Second Quarter of 2015 (April-June)

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): 490 dwellings (313 urban / 177 rural)

Outline permissions: 4 dwellings (4 urban / 0 rural)

Under Construction: 363 (281 urban / 82 rural)

Effective Housing Supply: 857 additional dwellings (598 urban, 259 rural) are under construction or have some form of permission, representing an increase since the first quarter of this year. The current housing supply continues to represents a 70/30% split between the supply arising from urban and rural areas, respectively.

There remains only one extant outline planning permissions for 4 dwellings at Admiral Park, St Peter Port.

42% of the pipeline is under construction, which represents an increase when compared to 37% in the first quarter. 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. This indicates that our percentage figure is in line with or higher than other jurisdictions.

Jersey	January 2013	29%
Chiltern District Council	March 2013	30%
North Norfolk	March 2015	25%

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	281	277	195	**476**
St Sampson's	47	47	32	**79**
Vale	35	35	83	**118**
Câtel	32	32	19	**51**
St Martin's	58	58	20	**78**
St Saviour's	17	17	2	**19**
Forest	3	3	4	**7**
Torteval	8	8	1	**9**
St Andrew's	7	7	0	**7**
St Peter's	6	6	7	**13**
TOTAL	**494**	**490**	**363**	**857**

Figure 1: Planning permissions for new dwellings by Parish

Second Quarter Statistics 2015

Approvals this quarter

Full planning permission was granted for a total of 69 additional dwellings during the second quarter of 2015. This represents a split of 55 [80%] in the urban area and 14 [20%] in the rural area, and is higher than the first quarter of 2015 where 40 new dwellings were granted permission. The largest permission granted this quarter was for 34 new dwellings at the Guernsey Brewery site in St Peter Port.

The average number of dwellings approved per quarter over the past 3 years was 80 units. Therefore this quarter's approvals are slightly below average. The majority of approvals granted this quarter were for re-development in the urban area and there were no approvals involving the loss of any units again this quarter.

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

	Urban area	Rural area	Total
New build	6	0	6
Re-development	40	0	40
Sub-division	0	1	1
Conversion	9	13	22
Loss of units	0	0	0
Total	55	14	69

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 2015 the number of dwellings permitted through applications allowed following appeal decisions have been incorporated.

No new dwellings were approved on appeal this quarter.

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 second quarter of 2015 which were approved in the second quarter of 2012.

During this quarter, 9 full permissions lapsed without being taken up for development. This equates to a total of 9 dwellings with a split of 3 permissions [33%] (7 dwellings, 78%) in the urban area and 6 permissions [67%] (2 dwellings, 22%) in the rural area. 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 may not necessarily reflect the number of permissions lapsing.

Figure 3 shows that the majority of lapsed permissions, and the most dwellings which would have otherwise been built, related to redevelopment of buildings for residential use.

	Permissions	Permissions %	Dwellings	Dwellings %
Conversion	2	22	2	22
New Build	1	11	1	11
Redevelopment*	5	56	5	56
Subdivision	1	11	1	11
Loss of units	0	0	0	0
Total	9	100	9	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. Figure 4 suggests that on average 70% of permissions have been granted per year, in the urban area, since 1995. It is also 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. It is useful to monitor these trends of permissions between the urban and rural area, as it helps to show the proportion of development in each area.

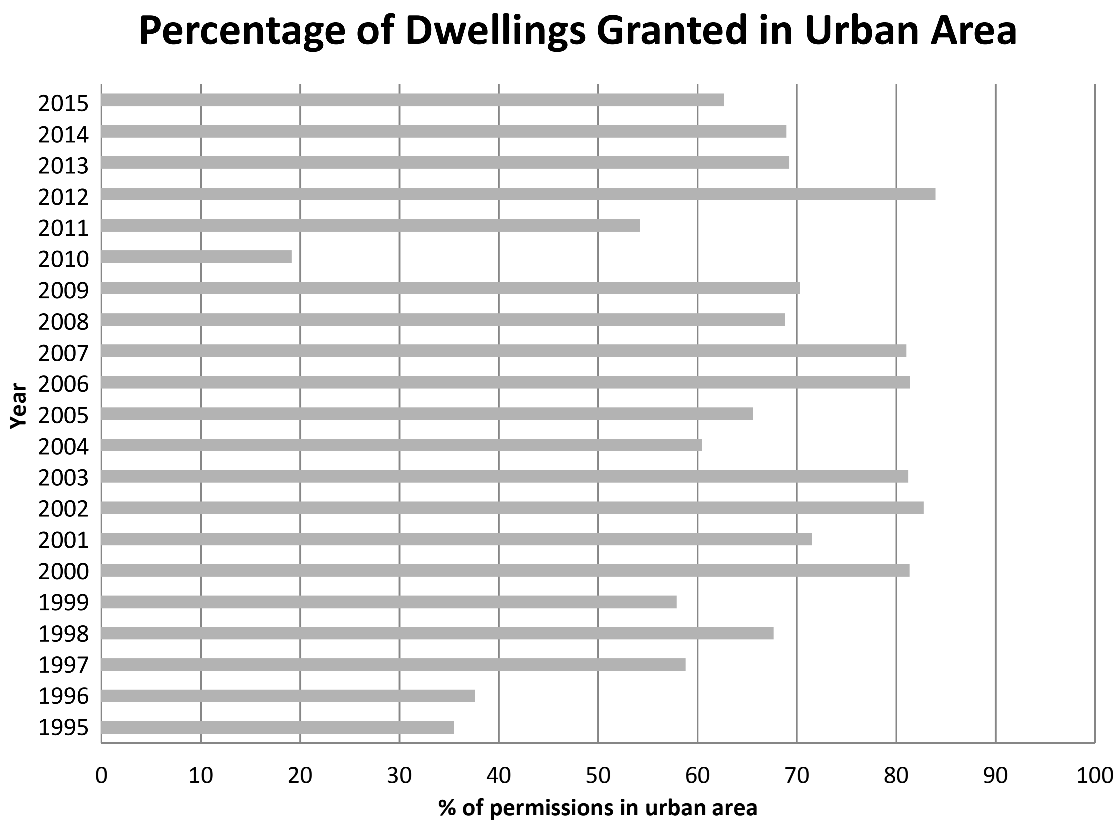


Figure 4: Percentage of planning permissions for new dwellings given in the urban area

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 quarter 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.

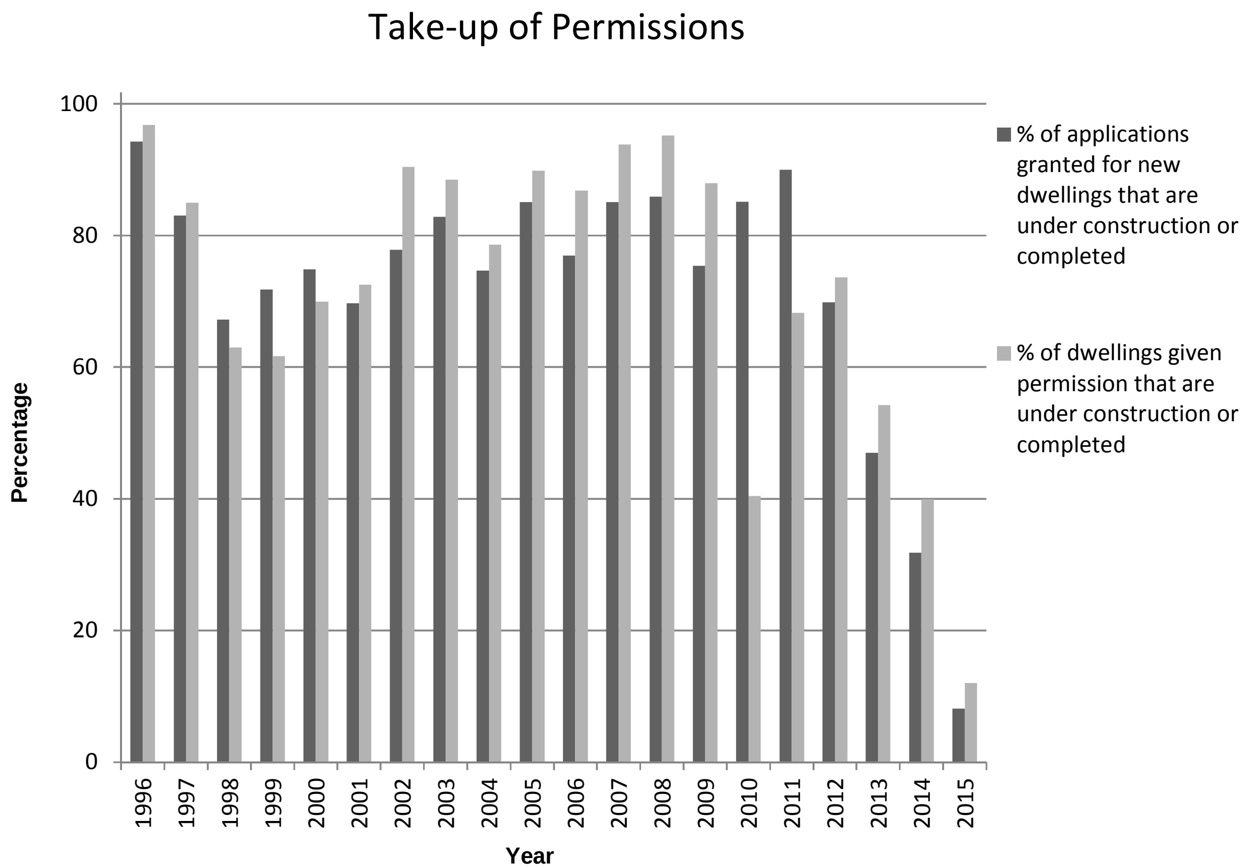


Figure 5: Monitoring the proportion of dwellings permitted that get built

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 2012 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
2006	258	224	87
2007	195	184	94
2008	186	177	95
2009	249	219	88
2010	97*	38*	39
2011	304	219	72
2012	349	257	74
2013	268	141	53
2014	338	135	40
2015	75	9	12
10 yr total	**2319**	**1603**	**69**

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 2012 onwards are the totals to date.

Year	No. of planning permissions involving new dwellings (B)	No. of planning permissions that have been implemented from the permissions given in that year (C)	% applications granted for new dwellings that have been implemented
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	81	70
2013	115	54	47
2014	110	35	32
2015	37	3	8
10 yr total	**1056**	**731**	**69**

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.

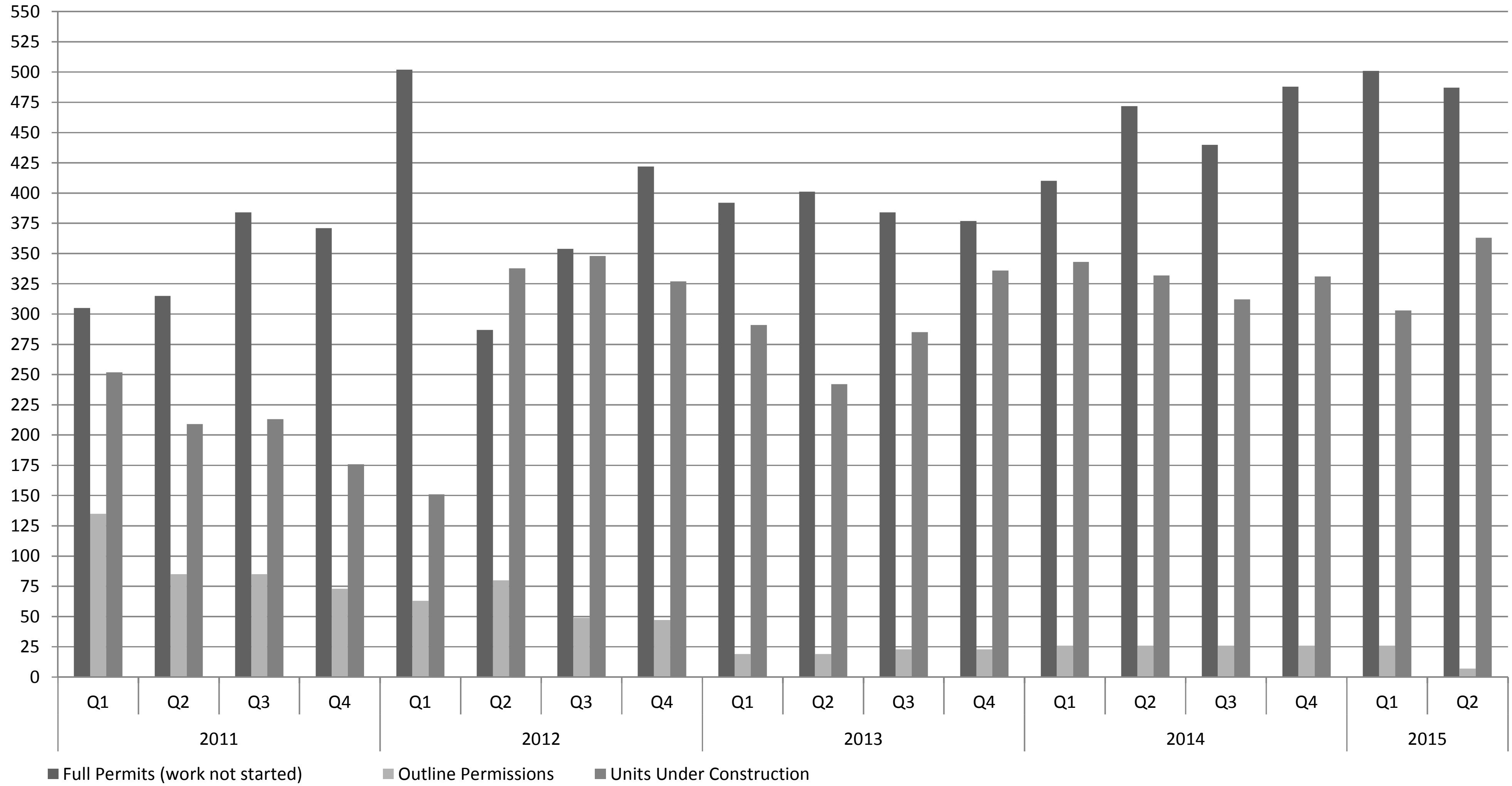
During this quarter a further 9 full permissions have lapsed in 2015 without being taken up for development. To date, this represents 18 full permissions or 16% of the total planning permissions granted in 2012. This equates to a total of 26 dwellings, with a split of 23 dwellings [88%] in the urban area and 3 dwellings [12%] in the rural area, and is 7% of the dwellings approved in 2012.

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)*
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	95	0	**95**	79	16	488	26	**514**	331	**845**
Total for 2014	***346***	***3***	***349***	***252***	***108***	488	26	**514**	331	**845**
2015										
Jan-March	40	0	**40**	26	14	501	26	**527**	303	**830**
April-June	69	0	**69**	55	14	490	4	**494**	363	**857**
July-Sept										
Oct-Dec										
Total for 2015	109	0	**109**	81	28	490	4	**494**	363	**857**

- 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.



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Q1
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Q4
2011
2012
2013
2014
2015
Full Permits (work not started)
Outline Permissions
Units Under Construction