

Housing Monitoring Report

First Quarter of 2016 (January-March)

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. The monitoring does not include dwellings that are within the Use Classes that include sheltered accommodation or nursing homes or similar.

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): 489 dwellings (332 urban / 157 rural)

Outline permissions: 24 dwellings (24 urban / 0 rural)

Under Construction: 317 (234 urban / 83 rural)

Effective Housing Supply: 825 additional dwellings (588 urban, 240 rural) are under construction or have some form of permission, representing a decrease since the fourth quarter of 2015. The current housing supply represents a 71/29% split between the supply arising from urban and rural areas, respectively.

At the end of Q1, the total outline planning permissions not yet commenced is 3. These are 2 permissions that relate to the same site at Admiral Park, St Peter Port resulting in 4 additional dwellings in total, and permission for the construction of 20 dwellings at the former Warry's Bakery, Le Grand Bouet, St Peter Port.

39% of the pipeline is under construction, which represents a slight increase when compared to 37% in the fourth quarter of 2015. 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 roughly average, when compared to other jurisdictions.

| | | |
|---------------------------|--------------|-----|
| Jersey | January 2013 | 29% |
| Chiltern District Council | March 2015 | 48% |
| North Norfolk | March 2016 | 44% |

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 | | Units under construction (c) | Total Units (a) + (c) "Pipeline figure" |
|---------------|---|--------------------------------|------------------------------|--|
| | (a) All types incl. outline permissions | (b) Permits alone (PMT+COU) | | |
| St Peter Port | 294 | 270 | 152 | 446 |
| St Sampson's | 69 | 69 | 30 | 99 |
| Vale | 19 | 19 | 80 | 99 |
| Câtel | 33 | 33 | 16 | 49 |
| St Martin's | 52 | 52 | 26 | 78 |
| St Saviour's | 14 | 14 | 7 | 21 |
| Forest | 4 | 4 | 0 | 4 |
| Torteval | 8 | 8 | 0 | 8 |
| St Andrew's | 10 | 10 | 0 | 10 |
| St Peter's | 5 | 5 | 6 | 11 |
| TOTAL | 508 | 484 | 317 | 825 |

Figure 1: Planning permissions for new dwellings by Parish

First Quarter Statistics 2016

Approvals this quarter

Full planning permission was granted for a total of 68 additional dwellings during the first quarter of 2016. This represents a split of 59 [87%] in the urban area and 9 [13%] in the rural area and is significantly higher than the fourth quarter of 2015 where 31 new dwellings were granted permission. The largest permissions granted this quarter were for 13 new dwellings at Kings Tennis Courts, Kings Road, St Peter Port and also 7 new dwellings at, Mont Morin, St Sampson.

No developments were granted outline planning permission this quarter.

The average number of dwellings approved per quarter over the past 3 years was 73 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 | 21 | 0 | 21 |
| Re-development | 35 | 0 | 35 |
| Sub-division | 0 | 3 | 3 |
| Conversion | 3 | 6 | 9 |
| Loss of units | 0 | 0 | 0 |
| Total | 59 | 9 | 68 |

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.

2 dwellings were permitted on a greenfield site this quarter. This site is located within the Belgrave Housing Target Area, accessed off Victoria Avenue, St. Sampson.

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 first quarter of 2016 which were approved in the first quarter of 2013.

During this quarter, 6 full permissions lapsed without being taken up for development which included a permission to demolish a dwelling and various permissions as set out in Figure 3 below for conversions, new dwellings and redevelopment. 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. These 6 lapsed permissions equates to a total of 3 additional dwellings not coming forward with a split of 2 permissions [33%] (2 dwellings, 67%) in the urban area and 4 permissions [66%] (1 dwellings, 33%) in the rural area.

Figure 3 shows that the majority of lapsed permissions related to re-development and conversion projects.

| | Permissions | Permissions % | Dwellings | Dwellings % |
|---------------|-------------|---------------|-----------|-------------|
| Conversion | 2 | 33 | 1 | 33 |
| New Build | 1 | 17 | 2 | 67 |
| Redevelopment | 2 | 33 | 0 | 0 |
| Subdivision | 0 | 0 | 0 | 0 |
| Loss of units | 1 | 17 | 0 | 0 |
| Total | 6 | 100 | 3 | 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 66% 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.

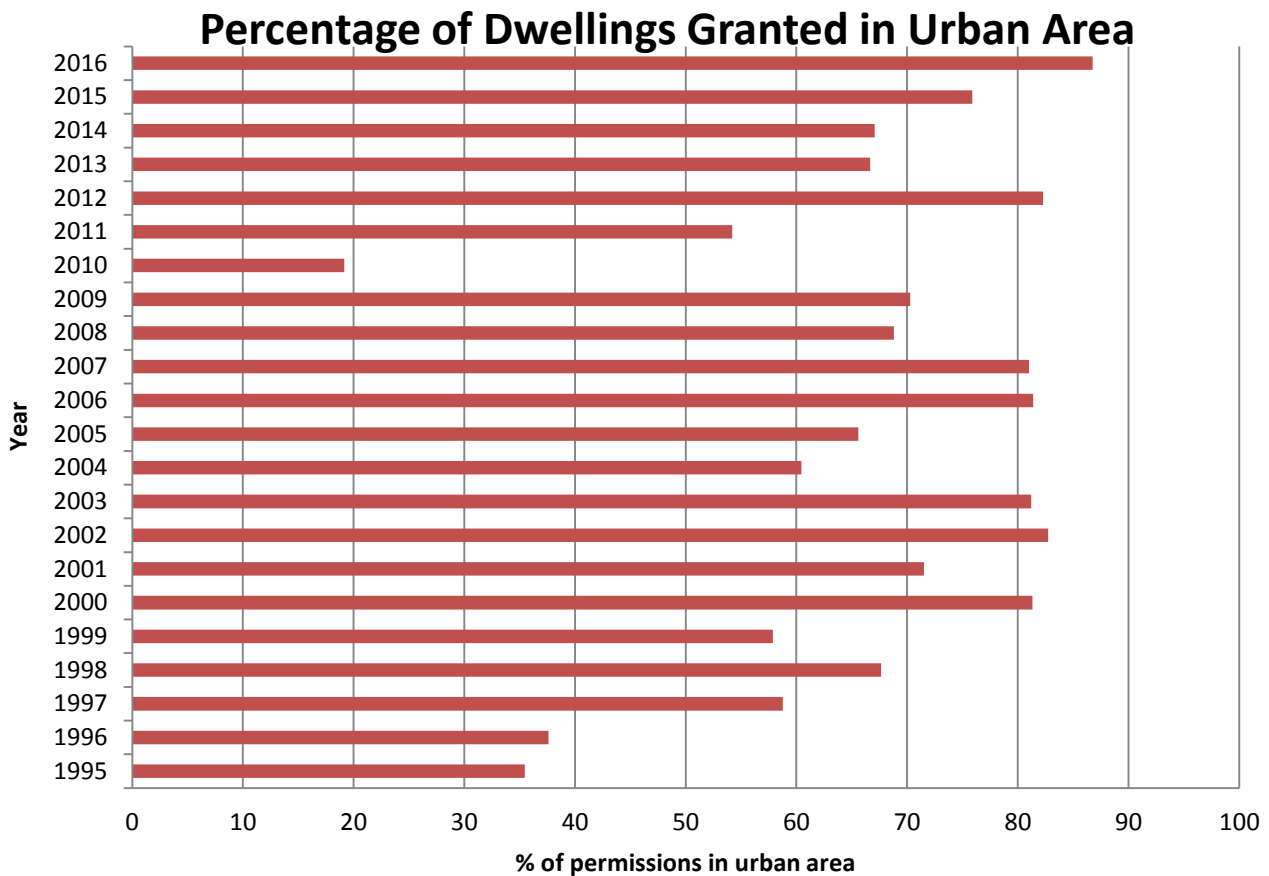


Figure 4: Percentage of planning permissions for new dwellings given in the urban area

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 tenth of permissions for residential development are taken up, after 2 years approximately two fifths of permissions are taken up and after 3 years over three fifths of permissions are taken up. These trends are considerably lower than observed in the past, which may be a reflection of the weakened housing market.

Take-up of Permissions

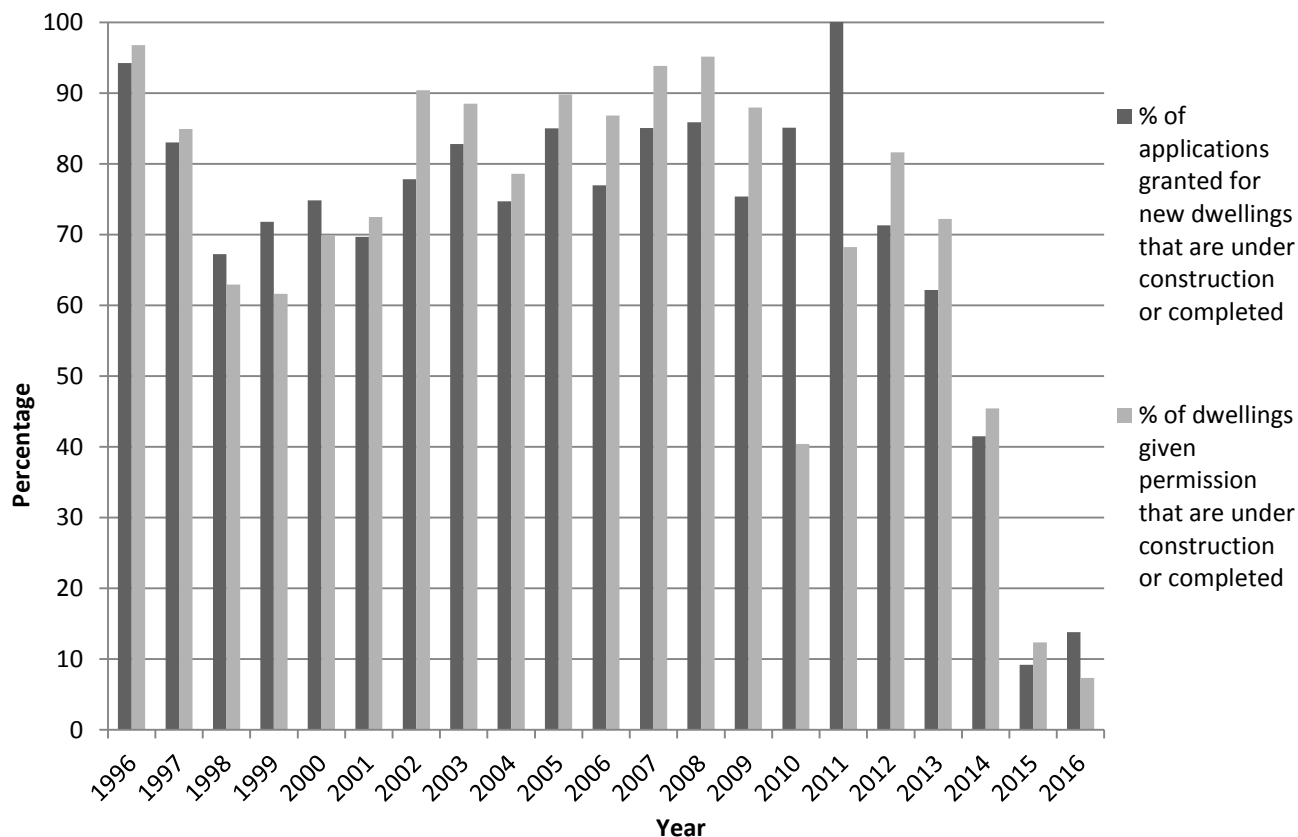


Figure 5: Monitoring the proportion of dwellings permitted that get built

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 2013 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 |
|--------------------|---|---|--|
| 2007 | 195 | 183 | 94 |
| 2008 | 186 | 177 | 95 |
| 2009 | 249 | 219 | 88 |
| 2010 | 94* | 38* | 40 |
| 2011 | 321 | 219 | 69 |
| 2012 | 316 | 258 | 82 |
| 2013 | 234 | 169 | 72 |
| 2014 | 328 | 149 | 45 |
| 2015 | 170 | 21 | 12 |
| 2016 | 68 | 5 | 7 |
| 10 yr total | 2161 | 1438 | 67 |

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 2013 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 |
|--------------------|--|---|--|
| 2007 | 87 | 74 | 85 |
| 2008 | 99 | 85 | 86 |
| 2009 | 126 | 95 | 75 |
| 2010 | 114 | 97 | 85 |
| 2011 | 199 | 129 | 65 |
| 2012 | 115 | 82 | 71 |
| 2013 | 111 | 69 | 62 |
| 2014 | 106 | 44 | 42 |
| 2015 | 87 | 8 | 9 |
| 2016 | 29 | 4 | 14 |
| 10 yr total | 1073 | 687 | 64 |

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.

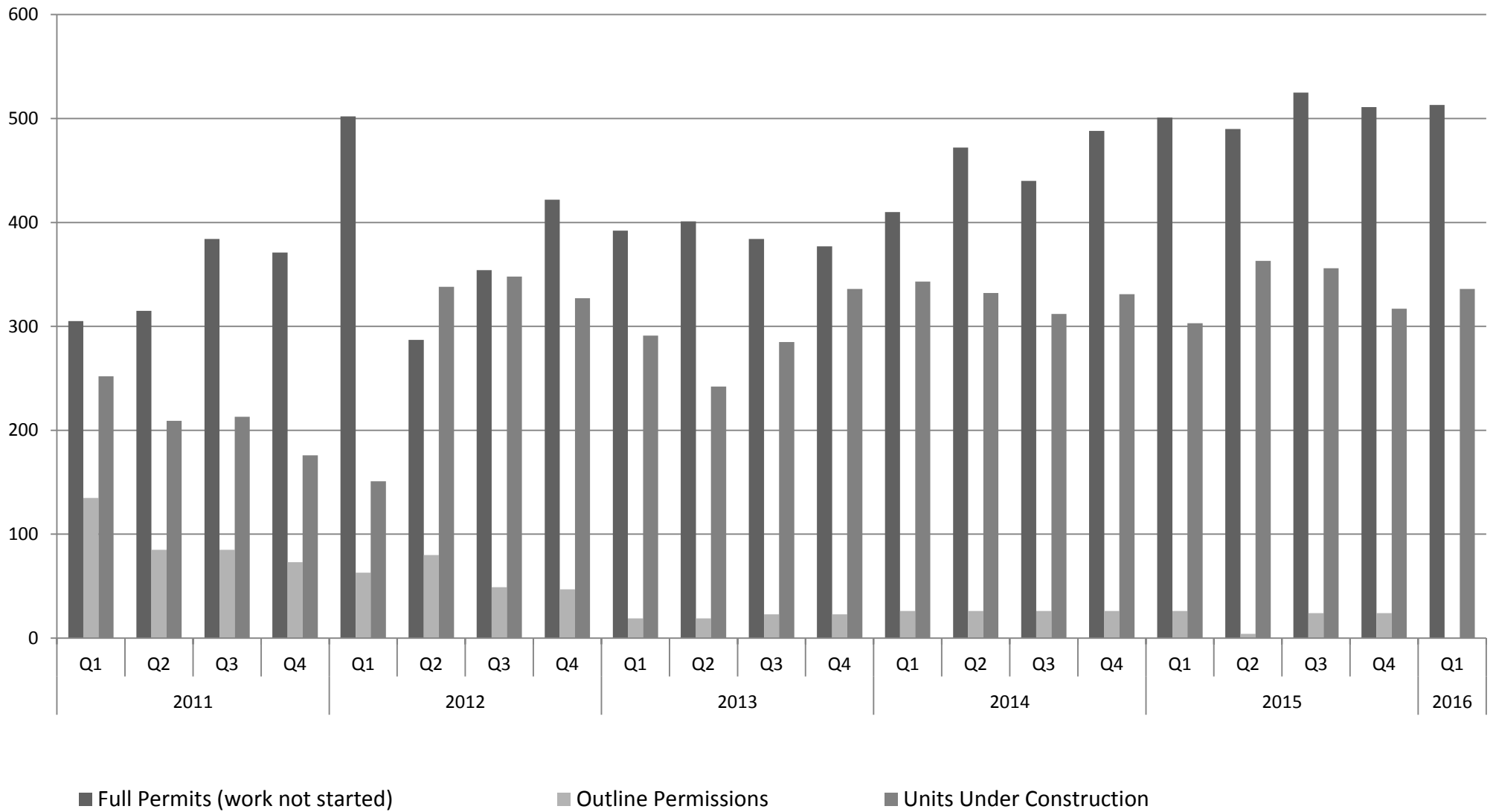
During this quarter a further 6 full permissions have lapsed without being taken up for development. This equates to a total of 3 dwellings, with a split of 2 dwellings [67%] in the urban area and 1 dwelling [33%] in the rural area, and is 1% of the dwellings approved in 2013.

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)

| | <i>Dwellings approved during period</i> | | | | | <i>Running totals at end of period</i> | | | | <i>Total (Potential housing stock)</i> |
|-----------------------|---|------------------|------------|---------------|------------|--|------------------|-------------------|--------------------------|--|
| | Full Permits | Outline consents | Total | Area Urban | Rural | Full Permits & COU NOT Started | Outline consents | Total Not Started | Units under Construction | |
| 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 | 71 | 20 | 91 | 85 | 6 | 525 | 24 | 549 | 356 | 905 |
| Oct-Dec | 31 | 0 | 31 | 24 | 7 | 511 | 24 | 535 | 317 | 852 |
| Total for 2015 | 211 | 20 | 231 | 190 | 41 | 511 | 24 | 535 | 317 | 852 |
| 2016 | | | | | | | | | | |
| Jan-March | 68 | 0 | 68 | 59 | 9 | 484 | 24 | 508 | 317 | 825 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

- 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.