

Housing Monitoring Report

Second Quarter of 2016 (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. 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): 577 dwellings (360 urban / 217 rural)

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

Under Construction: 302 (228 urban / 74 rural)

Effective Housing Supply: 883 additional dwellings (592 urban, 291 rural) are under construction or have some form of permission, representing an increase since the first quarter of 2016. The current housing supply represents a 67/33% split between the supply arising from urban and rural areas, respectively.

At the end of Q2, the total outline planning permissions not yet commenced is 2. These are 2 permissions that relate to the same site at Admiral Park, St Peter Port resulting in 4 additional dwellings in total.

34% of the pipeline is under construction, which represents a slight decrease when compared to 39% in the first quarter of 2016. 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 below 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"
	All types incl. outline permissions (a)	Permits alone (PMT+COU) (b)		
St Peter Port	299	295	149	448
St Sampson's	76	76	27	103
Vale	21	21	78	99
Castel	55	55	12	67
St Martin's	79	79	23	102
St Saviour's	25	25	7	32
Forest	3	3	1	4
Torteval	8	8	0	8
St Andrew's	9	9	0	9
St Peter's	6	6	5	11
TOTAL	581	577	302	883

Figure 1: Planning permissions for new dwellings by Parish

Second Quarter Statistics 2016

Approvals this quarter

Full planning permission was granted for a total of 148 additional dwellings during the second quarter of 2016. This represents a split of 80 [54%] in the urban area and 68 [46%] in the rural area and is significantly higher than the first quarter of 2016 where 68 new dwellings were granted permission. The largest permissions granted this quarter were for 24 new dwellings at Edgebaston Vinery, Saints Road, St Martin, 22 new dwellings at, Le Petit Villocq, Chemin Des Monts, Castel, and also 20 new dwellings at Warrys Bakery, Le Grand Bouet, St. Peter Port, all for the Guernsey Housing Association.

No developments were granted outline planning permission this quarter.

The average number of dwellings approved per quarter over the past 3 years was 81 units. Therefore this quarter's approvals are significantly above average. The majority of approvals granted this quarter were for new-builds in the rural area for social housing brought forward through the exception provided in Policy RH2 and re-development in the urban area. There was one approval involving the loss of a unit this quarter caused by a flat being converted to office use (Kings Premier Health Club).

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

	Urban area	Rural area	Total
New build	5	55	60
Re-development	47	3	50
Sub-division	22	6	28
Conversion	7	4	11
Loss of units	-1	0	-1
Total	80	68	148

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.

55 dwellings were permitted on three greenfield sites this quarter all of these sites were approved for social housing.

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 2016 which were approved in the second quarter of 2013.

During this quarter, 5 full permissions lapsed without being taken up for development which included various permissions as set out in Figure 3 below for conversions, new dwellings, subdivisions 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 5 lapsed permissions equates to a total of 9 additional dwellings not coming forward with a split of 2 permissions [40%] (4 dwellings, 44%) in the urban area and 3 permissions [60%] (5 dwellings, 56%) in the rural area.

Figure 3 shows that the majority of lapsed permissions related to conversion projects.

	Permissions	Permissions %	Dwellings	Dwellings %
Conversion	3	60	7	78
New Build	0	0	0	0
Redevelopment	0	0	0	0
Subdivision	2	40	2	22
Loss of units	0	0	0	0
Total	5	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 67% 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.

Percentage of Dwellings Granted in Urban Area

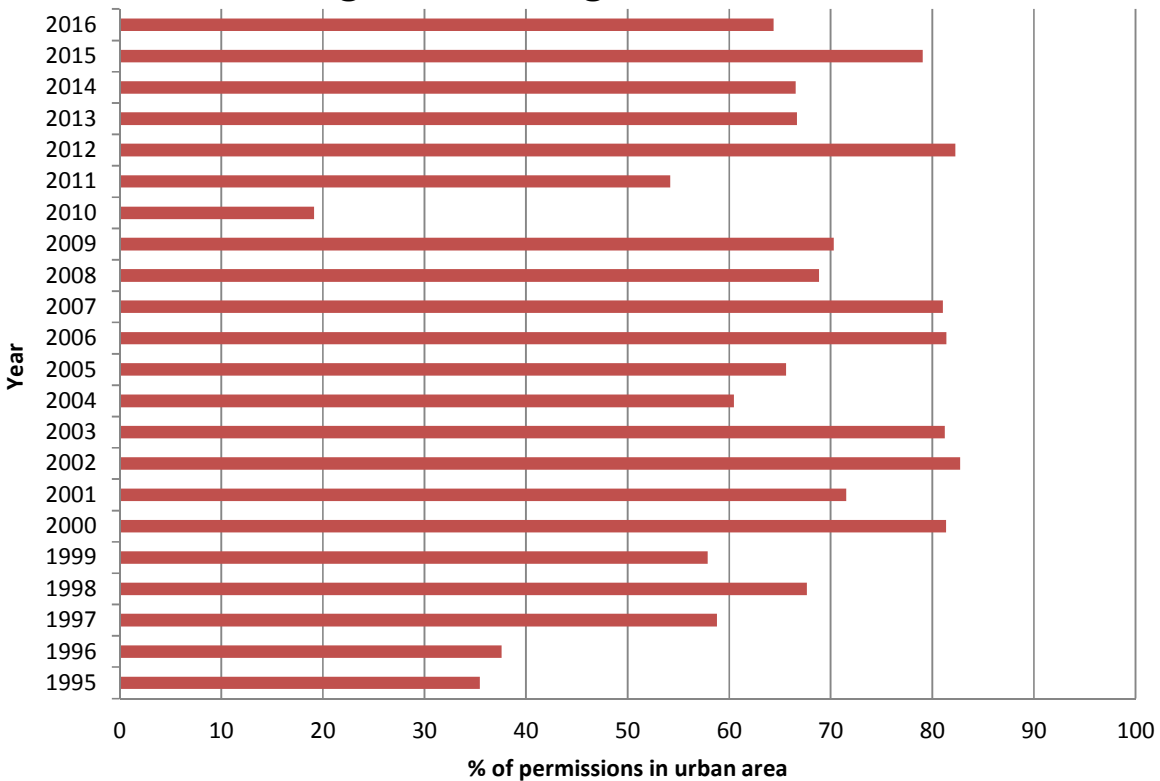


Figure 4: Percentage of planning permissions for new dwellings given in the urban area

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 an eighth of permissions for residential development are taken up, after 2 years approximately a quarter of permissions are taken up and after 3 years over a third 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

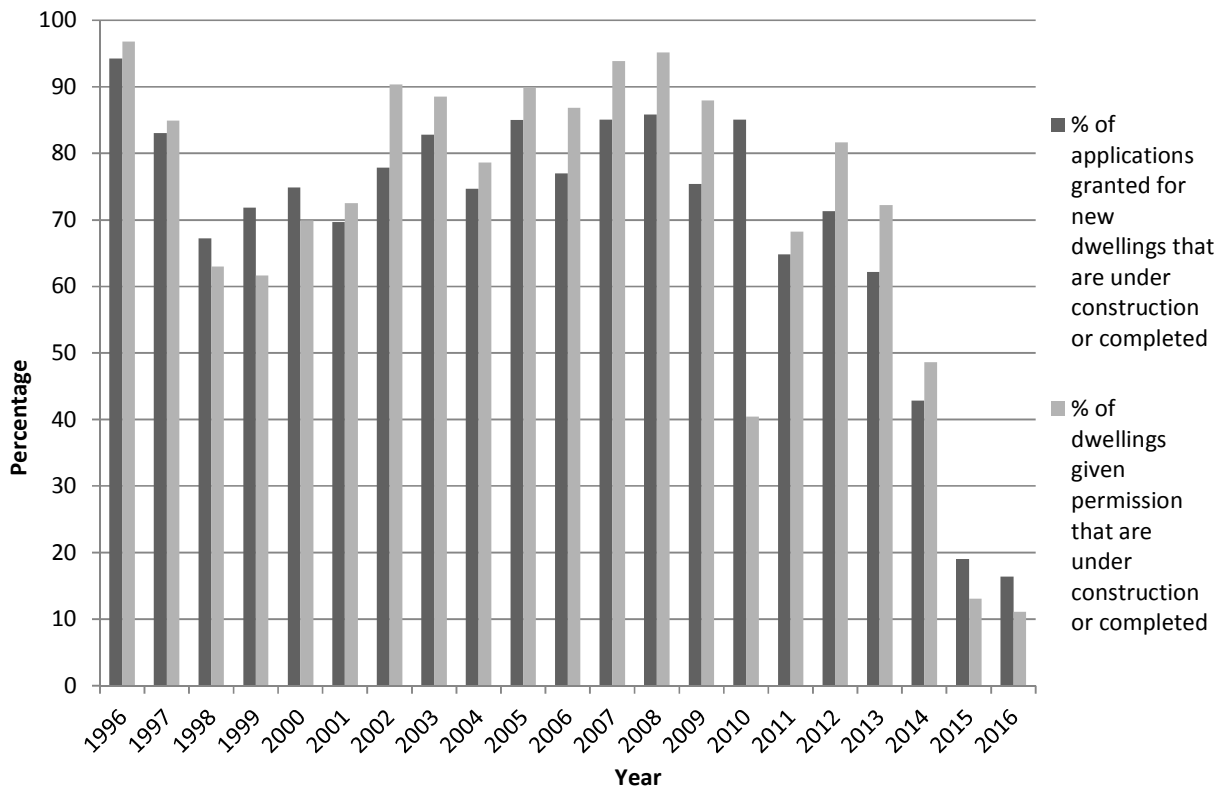


Figure 5: Monitoring the proportion of dwellings permitted that get built

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	323	157	49
2015	191	25	13
2016	216	24	11
10 yr total	2325	1469	63

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	105	45	43
2015	84	16	19
2016	67	11	16
10 yr total	1107	703	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.

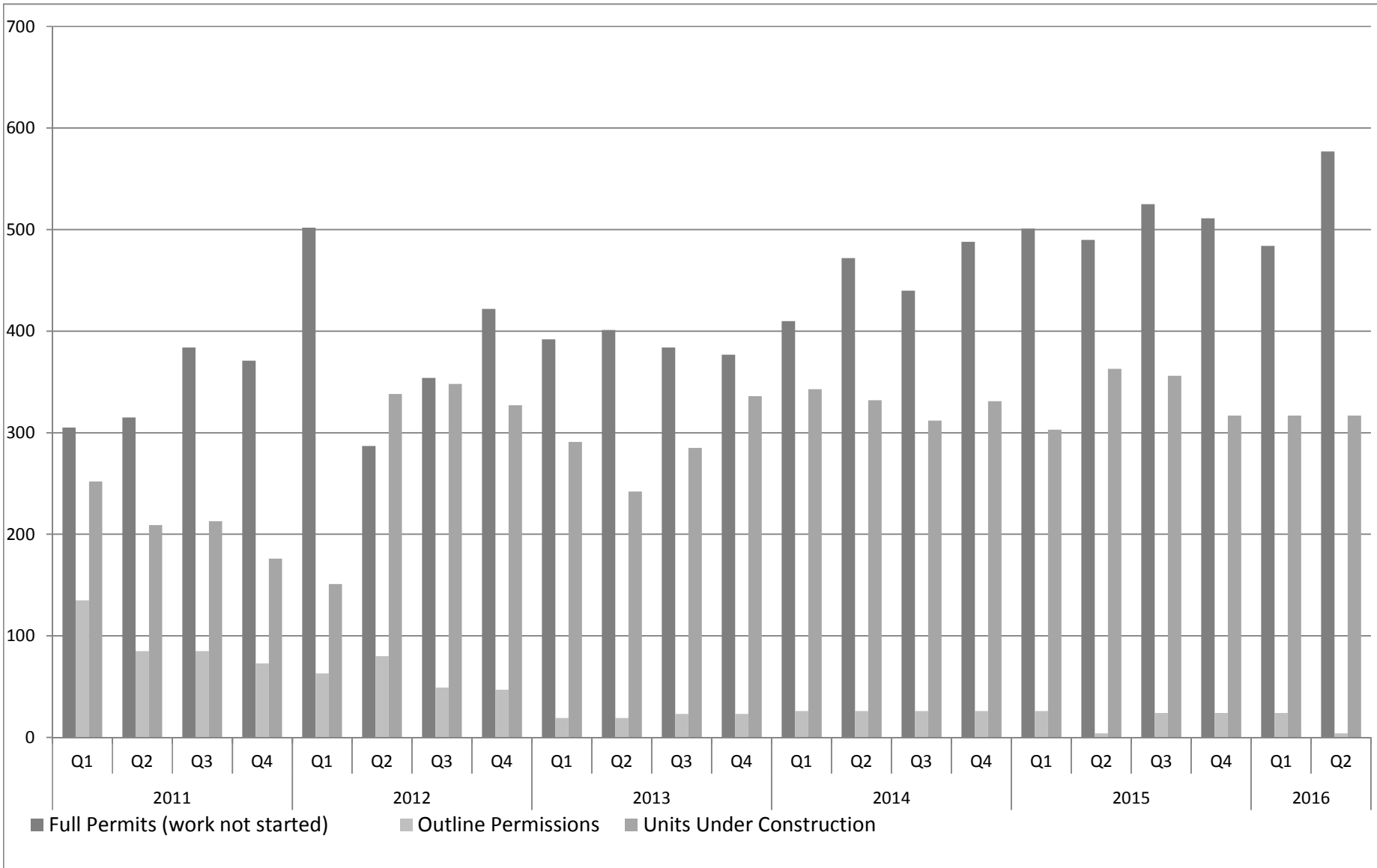
During this quarter a further 5 full permissions have lapsed without being taken up for development. This equates to a total of 11 dwellings, with a split of 4 dwellings [36%] in the urban area and 7 dwellings [64%] in the rural area.

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
April-June	148	0	148	80	68	577	4	581	302	883

- 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.