



# **Island Development Plan - Quarterly Monitoring Report**

Quarter 3 - 2018



States of Guernsey  
Planning Service

## 1. Introduction

To ensure that the Island Development Plan (IDP) continues to be effective and relevant it requires on-going monitoring of the success of its policies in achieving the Plan's objectives and the requirements of the Strategic Land Use Plan.

The Development & Planning Authority's approach to monitoring the Island Development Plan is set out in detail in Section 21 of the IDP. In summary, the Authority publishes quarterly and annual monitoring reports.

Quarterly monitoring reports are a factual report providing an update on the delivery of housing and employment related development through the planning system. These are important barometers of the Island economy and of the successful implementation of the Island Development Plan (IDP).

The quarterly reports are informative and use quantitative data sourced from the Authority's records and from market information available online. The reports record the net change in new dwellings permitted and floorspace and land for employment uses (offices, industry and storage & distribution). Further analysis is provided on the nature and location of planning permissions.

The Annual Monitoring Reports are more comprehensive reports that contain both quantitative and qualitative information, analysis and include feedback from stakeholders. The annual reports include an assessment of whether the IDP Plan Objectives are still appropriate and being met, whether the requirements of the Strategic Land Use Plan are being met and determine whether there is a need to:

- undertake a partial or full review of the Island Development Plan
- prepare a new statutory Plan
- review the Strategic Land Use Plan, 2011
- provide updated or new guidance or evidence
- review housing land supply and allocated sites for housing
- review employment land supply and land allocated for employment uses
- take action to help bring forward sites for development, wherever possible in partnership with landowners and developers
- take action to help secure the timely provision of infrastructure.

This process enables the Island Development Plan to maintain sufficient flexibility to adapt to changing circumstances.

## 2. Residential Development

### Introduction

The Island Development Plan has an objective to 'ensure access to housing for all' and generally supports the development of new dwellings in the Main Centres, Main Centre Outer Areas and Local Centres. New dwellings are also supported Outside of the Centres, in certain circumstances, through sub-division of existing dwellings or through conversion of redundant buildings.

Consistent with the Strategic Land Use Plan (2011), the Island Development Plan (IDP) makes provision for the Island's housing requirement for the first five years of the Island Development Plan period and 15 sites have been allocated in the IDP specifically for housing development, all within either a Main Centre or Main Centre Outer Area which, combined with 'windfall'<sup>1</sup> development on other sites and existing permissions, make up the five year requirement.

The housing requirement is based on the States' Strategic Housing Indicator. When the IDP was adopted in November 2016, this indicator was set at 300 additional new dwellings each year. In July 2018, the States resolved to agree the States Strategic Housing Indicator be set at creating 635 new units of accommodation between 2017 and 2021, with a plus or minus variance of 149 new units to give the flexibility to react to market changes. This equates to an annual average of 127 additional units of accommodation with a plus or minus variance of 30 new units of accommodation. It also agreed to separate the States Strategic Housing Indicator into an Affordable Housing Indicator set at creating 178 units of Affordable Housing over the next 5 years with a plus or minus variance of 32 new units to give the flexibility to react to demand and market changes and a private market housing indicator of 457 new units of accommodation with a plus or minus variance of 117 new units of accommodation for the same period. The indicator will be subject to review by the States from time to time.

In accordance with the Strategic Land Use Plan, the Authority seeks to ensure that a two-year housing provision is effectively made at any one time through housing permissions. This is called the 'pipeline supply'. Given the current annual indicator of 97-157 additional new dwellings per year, this equates to 194-314 new dwellings (136-230 private market, 58-84 affordable housing).

The primary purpose of the quarterly housing monitoring is to monitor whether a two year supply of housing permissions is being maintained. In addition, other statistics are presented to provide a more in-depth analysis of the type, source and spatial distribution of new dwellings and the take-up<sup>2</sup> of planning permissions.

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<sup>1</sup> Windfall Sites are undesignated sites that come forward for development during the Island Development Plan period which are not specifically identified in the Island Development Plan for that purpose, but for which policies exist to support its provision.

<sup>2</sup> The 'take-up' of planning permissions refers to developments with planning permission that have commenced i.e. building work has begun on site.

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.

### 'Pipeline' Housing Supply

New housing is deemed to be effectively available where planning permission has been granted and the development is not yet complete, and where the development of new housing is acceptable in principle (outline planning permission). **Figure 1** below demonstrates the number of dwellings in the 'pipeline' this quarter:

| Source of Supply                      | Number of dwellings |                  |                              |            | Total<br>Q2 '18 | Total<br>Q1 '18 | Total<br>Q4 '17 |
|---------------------------------------|---------------------|------------------|------------------------------|------------|-----------------|-----------------|-----------------|
|                                       | Main<br>Centres     | Local<br>Centres | Outside of<br>the<br>Centres |            |                 |                 |                 |
| Full permissions (work not commenced) | 265                 | 48               | 126                          | 439        | 415             | 440             | 486             |
| Outline permissions                   | 16                  | 0                | 0                            | 16         | 345             | 345             | 345             |
| Under Construction                    | 258                 | 2                | 67                           | 327        | 350             | 361             | 346             |
| <b>Total</b>                          | <b>539</b>          | <b>50</b>        | <b>193</b>                   | <b>782</b> | 1110            | 1146            | 1177            |
| <b>Pipeline Supply</b>                | <b>782</b>          |                  |                              |            |                 |                 |                 |

Figure 1: Pipeline Housing Supply (with comparison to previous quarters)

A full breakdown of the pipeline housing supply by the individual Main Centres, Main Centre Outer Areas and Local Centres is provided in Appendix 1.

The substantial reduction in the number of outline permissions (345 dwellings to 16 dwellings) is as a result of the outline planning permission for 303 dwellings at Leale's Yard, The Bridge, lapsing during the quarter and approval of reserved matters for 26 dwellings at Les Blanchés, St Martin.

The largest permissions (20 or more dwellings) in the pipeline supply are:

| Site  | Dwellings | Decision | Progress           | Centre                  |
|---|-----------|----------|--------------------|-------------------------|
| Leale's Yard, The Bridge                                  | 109       | 24/8/16  | Work not started   | St Sampsons / Vale MC   |
| Rue Du Tertre/La Route Du Braye, Vale (sheltered housing) | 43        | 4/11/14  | Under construction | St Sampsons / Vale MCOA |
| St Martin's Hotel, St Martin                              | 35        | 21/7/16  | Work not started   | St Martin's LC          |
| Guernsey Brewery & No.11 & 12 The Strand, St Peter Port   | 34        | 6/5/15   | Under construction | St Peter Port MC        |
| Les Blanchés, St. Martin (sheltered and affordable)       | 26        | 27/11/17 | Work not started   | Outside of the Centres  |

|  |    |        |                    |                  |
|--|----|--------|--------------------|------------------|
| housing)<br>Springburn (Former CI Tyres),<br>La Charroterie, St Peter Port |    |        |                    |                  |
|  | 23 | 8/9/15 | Under construction | St Peter Port MC |

Figure 2: Largest permissions in the pipeline

The remainder of the pipeline supply is made up of 512 permissions.

### Third Quarter 2018 - Permissions

#### Approvals this quarter

Full planning permission was granted for a total of 30 additional dwellings on 23 sites during the third quarter of 2018.

This is down 7% on the second quarter of 2018 where 32 new dwellings were granted permission.

The average number of dwellings approved per quarter over the past 3 years was 65 units (not including outline permissions). Therefore this quarter's approvals are below average.

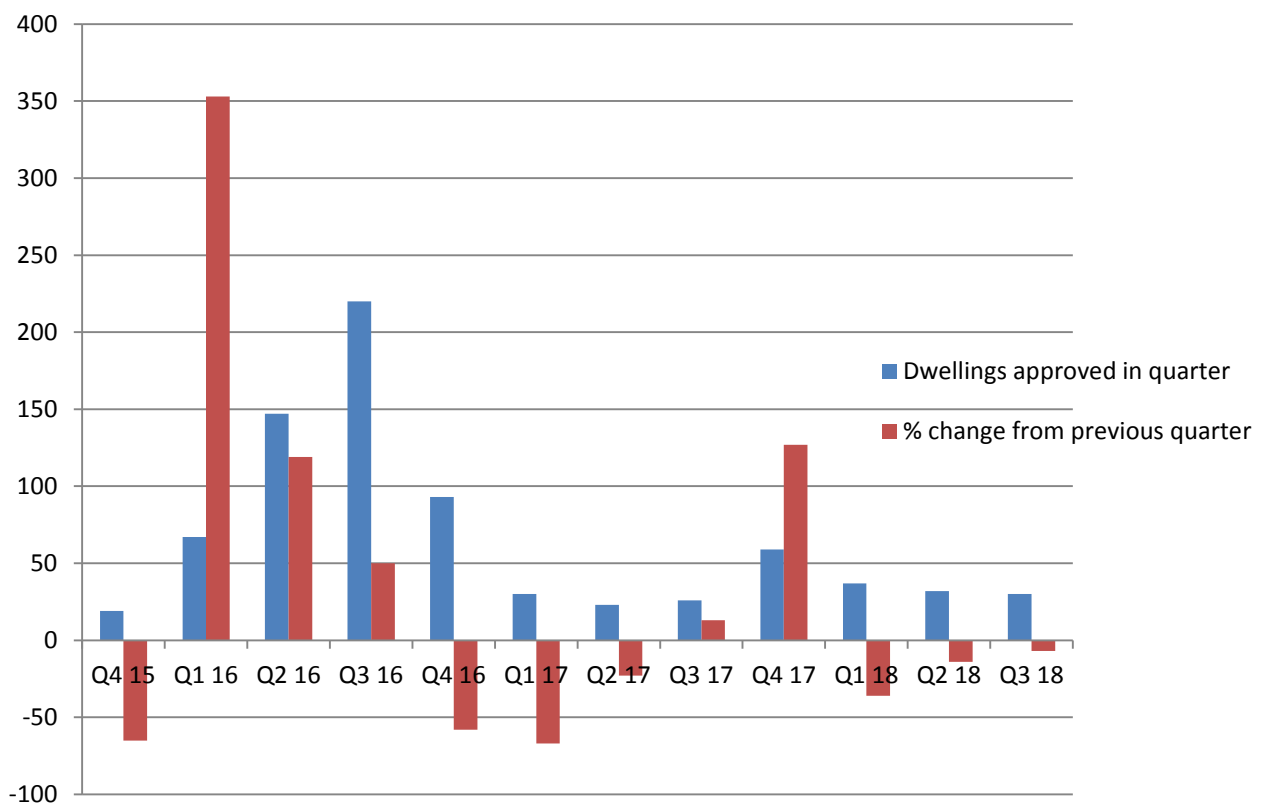


Figure 3: Dwellings approved in quarter and percentage change from previous quarters – 3 year period (excluding outline permissions)

The largest planning permissions granted this quarter were at a Housing Allocation site on Maurepas Road, St Peter Port (erect 6 new dwellings with associated parking and

landscaping) and at a site on Guelles Road, St Peter Port, that has an approved Development Framework (redevelopment of site to create 14 apartments with parking and landscaping).

### Location of Development

The approvals this quarter represent a split of 22 dwellings [73%] in Main Centres, 3 [10%] in Local Centres and 5 [17%] Outside of the Centres.

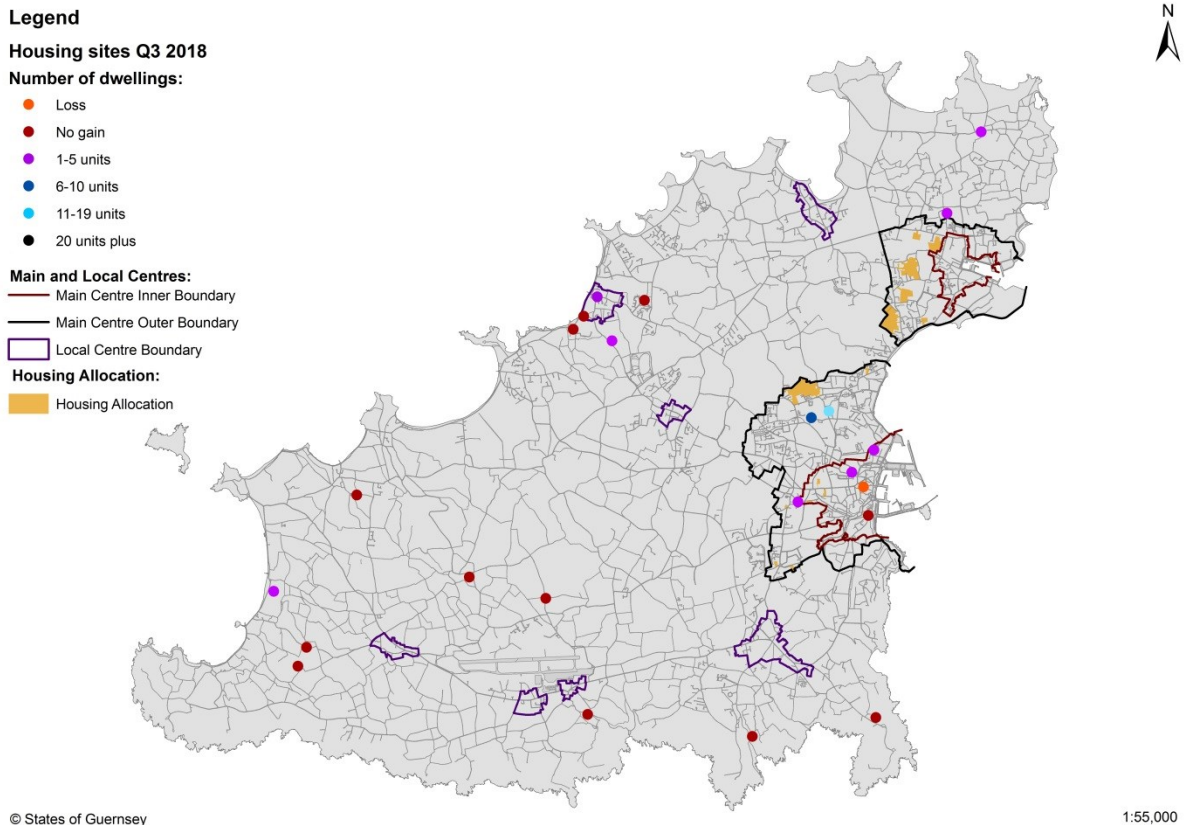


Figure 4: Dwellings approved in quarter

### Brownfield / Greenfield development

The Island Development Plan allows for the development of greenfield sites for residential development where they are located within a Main Centre, Main Centre Outer Area or Local Centre and where there are no other designations restricting development (such as Important Open Land). The Plan also allows for development of greenfield sites Outside of the Centres through conversion of redundant buildings.

Under the Land Planning and Development (Guernsey) Law, 2005, horticultural premises, including redundant glasshouse sites and any ancillary structures, are treated as agricultural land and are therefore considered greenfield land.

8 dwellings were permitted on greenfield sites this quarter, 6 dwellings on a field at Maurepas Road, St. Peter Port (which is a Housing Allocation in the Main Centre Outer Area), a conversion of a packing shed to a dwelling at Route De La Hougue Du Pommier, Castel (Outside of the Centres), and conversion of a store to a dwelling at Tertre Lane, Vale

(Outside of the Centres). Residential development on a further 3 brownfield sites involved the creation of curtilage from adjacent greenfield land.

### Types of development and dwellings permitted

The types of development and dwellings permitted this quarter are as follows:

| Type of development  | Use Class           |                                     |          |                                    |                                  |
|----------------------|---------------------|-------------------------------------|----------|------------------------------------|----------------------------------|
|                      | Detached house (1a) | Semi-detached / terraced house (1b) | Flat (2) | Sheltered housing (3) <sup>3</sup> | House in Multiple Occupation (6) |
| <b>New build</b>     | 2                   | 5                                   |          |                                    |                                  |
| <b>Re-develop</b>    |                     | 1                                   | 17       |                                    |                                  |
| <b>Sub-division</b>  |                     |                                     |          |                                    |                                  |
| <b>Conversion</b>    | 4                   | 1                                   | 1        |                                    |                                  |
| <b>Loss of units</b> |                     |                                     | -1       |                                    |                                  |
| <b>Total</b>         | 6                   | 7                                   | 17       |                                    |                                  |

Figure 5: Types of development and dwellings permitted

The numbers of dwellings shown in Figure 5 relates to the net number of dwellings in each development e.g. where 3 new dwellings replace 1 dwelling this is counted as 2. The size and type of new dwellings permitted this quarter are shown in Figure 6. 45 new dwellings will replace 15 dwellings as shown in Figure 7, giving the net figure of 30 dwellings permitted this quarter. The size and type of new dwellings permitted this quarter are as follows:

| Unit type            | Number of bedrooms - New Dwellings |    |   |    |     |
|----------------------|------------------------------------|----|---|----|-----|
|                      | 1                                  | 2  | 3 | 4+ | HMO |
| <b>Detached</b>      | 2                                  | 2  | 2 | 10 |     |
| <b>Semi-detached</b> |                                    | 3  |   |    |     |
| <b>Terraced</b>      |                                    | 3  | 2 |    |     |
| <b>Flat</b>          | 13                                 | 7  |   | 1  |     |
| <b>Sheltered</b>     |                                    |    |   |    |     |
| <b>Total</b>         | 15                                 | 15 | 4 | 11 |     |

Figure 6: Size and type of dwellings permitted this quarter

The size and type of dwellings to be replaced by the above permissions are as follows:

<sup>3</sup> Sheltered Housing is a group of dwellings affording facilities and support services especially suited to the needs of older, disabled or other persons with particular needs (including the on-call assistance of a warden) as a permanent residence.

| Unit type     | Number of bedrooms - Replaced Dwellings |          |          |          |             |     | Total     |
|---------------|---|----------|----------|----------|-------------|-----|-----------|
|               | 1                                       | 2        | 3        | 4+       | Unkn<br>own | HMO |           |
| Detached      |   | 3        | 4        | 2        | 2           |     |           |
| Semi-detached |   |          |          |          |             |     |           |
| Terraced      |   |          |          |          |             |     |           |
| Flat          |   | 4        |          |          |             |     |           |
| Sheltered     |   |          |          |          |             |     |           |
| <b>Total</b>  |   | <b>7</b> | <b>4</b> | <b>2</b> | <b>2</b>    |     | <b>15</b> |

Figure 7: Size and type of dwellings to be replaced by the dwellings permitted this quarter

There was no new specialised housing permitted this quarter. Specialised housing includes housing units with care provided to residents such as extra care accommodation, nursing and residential homes and other accommodation for people in need of care.

### Affordable Housing<sup>4</sup>

Island Development Plan policy GP11 requires proposals for development resulting in a net increase of 20 or more dwellings to provide a proportion of the developable area of the site for Affordable Housing. In some cases the provision of units or, in exceptional cases, off-site land or unit provision is permitted. In addition, some permissions are given for Affordable Housing exclusively (such as developments by the Guernsey Housing Association).

No sites had a Policy GP11 Affordable Housing requirement this quarter. Permission was granted for Affordable Housing for the Guernsey Housing Association at Maurepas Road, St Peter Port (6 units).

To date, under the Island Development Plan, Policy GP11 has yet to be relevant to a planning proposal and there has therefore been no land or units provided for Affordable Housing as a proportion of a developable site area as a direct result of this policy. However, 56 Affordable Housing units have been permitted under other Island Development Plan policies.

### Delivery of housing - Developments Commencing and Completed

Whilst the housing supply requirement in the IDP relates only to the number of permissions granted, it is also useful for monitoring of the States Strategic Housing Indicator to monitor how many of these permissions get built (are taken-up). The annual rate of take-up is analysed in the Annual Monitoring Report.

Figure 8 shows that the total number of dwellings commencing construction this quarter is 18 (8 private market, 10 Affordable Housing). This is 5.5% of the total number of dwellings under construction (327).

<sup>4</sup> Affordable Housing is for those households whose needs are not met by, or who cannot afford, accommodation in the private sale or rental market without assistance. It is normally provided through the States of Guernsey or a registered Housing Association.



Figure 8 shows that the total number of dwellings completed construction this quarter is 42 (18 private market, 24 Affordable Housing).

|                                  | Commencements Private |            | Commencements Affordable |            | Completions Private |            | Completions Affordable |           |
|----------------------------------|-----------------------|------------|--------------------------|------------|---------------------|------------|------------------------|-----------|
|                                  | Sites                 | Units      | Sites                    | Units      | Sites               | Units      | Sites                  | Units     |
| Main Centres                     | 4                     | 4          | -                        | -          | 5                   | 12         | -                      | -         |
| Local Centres                    | -                     | -          | -                        | -          | 1                   | 1          | -                      | -         |
| Outside Centres                  | 5                     | 4          | 1                        | 10         | 3                   | 5          | 1                      | 24        |
| <b>Total</b>                     | <b>9</b>              | <b>8</b>   | <b>1</b>                 | <b>10</b>  | <b>9</b>            | <b>18</b>  | <b>1</b>               | <b>24</b> |
| Running total since IDP adoption | <b>81</b>             | <b>148</b> | <b>6</b>                 | <b>100</b> | <b>56</b>           | <b>100</b> | <b>7</b>               | <b>93</b> |

Figure 8: Developments commencing and completing during the quarter

Figure 9 shows how many dwellings were permitted in each year (including outline permissions) and how many dwellings have been completed from each year.

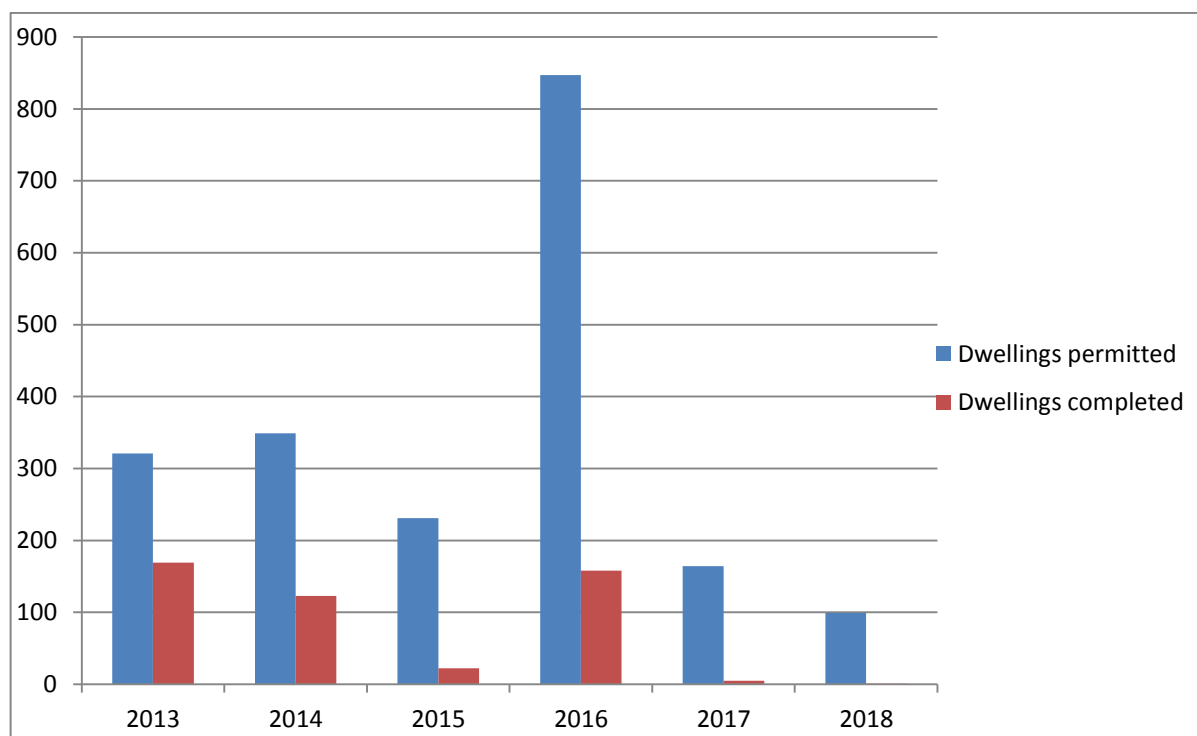


Figure 9: Dwellings permitted (net) and dwellings completed from the permissions in each year (2013 to date)

### Delivery of housing – Source of the supply

In accordance with the requirements of the Strategic Land Use Plan the Island Development Plan identifies a minimum five year land supply for housing. At the time the Island Development Plan came into force the annual Strategic Housing Indicator was 300 additional new dwellings per year giving a five year land supply requirement for 1,500 dwellings. In July 2018, the States resolved to agree the States Strategic Housing Indicator be set at creating 635 new units of accommodation between 2017 and 2021, with a plus or

minus variance of 149 new units. Below is a review of the supply in relation to the new indicator. It should be noted that the indicator relates to the creation of new dwellings not the supply of land through the planning system. The supply of land must be sufficient to allow for the development of at least the number of units expressed as the States Strategic Housing Indicator. The States has no control over implementation of planning permissions and this is why the Indicator is not expressed as a target.

There will be a review of housing land supply before five years from the adoption of the IDP (November 2021), unless monitoring indicates a more urgent need to review the land supply sooner. As the new Strategic Housing Indicator of 635 new units of accommodation between 2017 and 2021 (+/- 149 units) is substantially lower than the former Strategic Housing Indicator of 1,500 units over the same period of time (300 units per year) there will be no immediate requirement to amend the IDP to identify additional housing land supply. As the IDP has provided for a five year supply of housing land at the former higher requirement this will be taken into account when providing for the next five year housing land supply in accordance with the SLUP.

The methodology used to identify the supply of land for housing to meet the housing indicator (the Strategic Housing Land Availability Assessment, 2014 (SHLAA)) identifies a 5 year supply of housing based on:

|   |         |
|---|---------|
| A. Dwellings with permission / under construction | 713     |
| B. Allocated sites                                | 718     |
| C. Windfall allowance                             | 150-300 |

A summary explanation of the methodology used to identify the supply of land for housing is available [here](#) ('Approach to the Housing Sites Allocations in the Draft Island Development Plan, December 2014').

#### A. Dwellings with permission / under construction

The current pipeline supply (dwellings with permission or under construction) is 782 dwellings. See [Figure 1](#) above.

#### B. Allocated sites

There are 15 housing allocations in the IDP in the Main Centres and Main Centre Outer Areas which are identified to be used for housing development including ancillary complementary development. The progress in the delivery of housing on these sites is set out in [Figure 10](#) below.

| Housing allocation sites | Progress                      | Net units in quarter | Net Units |
|--------------------------|-------------------------------|----------------------|-----------|
| Belgrave Vinery          | None                          |                      |           |
| Bougourd Ford            | None                          |                      |           |
| Braye Lodge              | Development Framework adopted |                      |           |
| Cleveleys Vinery         | Development Framework adopted |                      |           |
| Education offices        | None                          |                      |           |

| Housing allocation sites                          | Progress   | Net units in quarter | Net Units |
|---|--|----------------------|-----------|
| Priaulx Garage                                    | Permission 2017 (under construction)                                       |                      | 19        |
| Franc Fief  | None   |                      |           |
| King's Club                                       | Permission 2016  |                      | 13        |
| La Vrangue  | None since the adoption of the IDP   |                      |           |
| Les Bas Courtils                                  | Permission for works to house / barn 2017<br>Development Framework adopted |                      | 5         |
| Maurepas Road                                     | Permission 2018  |                      | 6         |
| Petites Fontaines                                 | Permission 2016  |                      | 10        |
| Pointues Rocques                                  | Draft Development Framework published                                      |                      |           |
| Saltpans  | None   |                      |           |
| Warry's Bakery                                    | Reserved matters permission 2016 –<br>development completed                |                      | 20        |
| <b>Total units (net) permitted on allocations</b> |  |                      | <b>73</b> |

Figure 10: Progress of housing site allocations

This quarter 6 dwellings were permitted on an allocated housing site. To date 73 dwellings have been permitted on allocated sites. Remaining supply from allocated sites is therefore c.645 dwellings. 53 of these dwellings form part of the pipeline supply.

### C. Windfall allowance

The 'windfall' allowance<sup>5</sup> (sites other than the allocated sites) in the 5 year supply methodology used in the SHLAA (2014) is up to 20% i.e. up to 20% of 1500 dwellings which is 300 dwellings over 5 years. This equates to up to 15 dwellings per quarter. This quarter 24 dwellings were permitted on windfall sites. To date since the adoption of the IDP 239 dwellings have been permitted on windfall sites.

The windfall allowance was based on the former housing indicator (300 dwellings per annum) and historic trends. It is not a target but is monitored here to inform future iterations of the SHLAA. The windfall allowance will be reassessed as part of the update of the SHLAA alongside the housing land supply review before the 5 year point of the IDP.

### Housing supply

In summary, the current housing supply is shown in Figure 11.

<sup>5</sup> In the Strategic Housing Land Availability Assessment (SHLAA) only sites of 0.25 acres (0.1 Ha, 0.6 vergée) and over or that could provide 5 or more dwellings have been identified as contributing to the supply of land. It was envisaged that mainly sites below this threshold would contribute to windfall provision, although sites over this threshold may come forward as windfall. The Plan does not include housing site allocations in the Local Centres or Outside of the Centres and the SHLAA did not include those locations in the land supply. Any dwellings permitted in these locations would form part of the windfall provision.

| Source of housing supply  | Q3 2018          | Q2 2018          | Q1 2018          |
|---|------------------|------------------|------------------|
| Dwellings with permission / under construction                        | 782              | 1110             | 1146             |
| Remaining capacity on allocated sites                                 | 645              | 651              | 651              |
| Windfall allowance  | 150-300          | 150-300          | 150-300          |
| <b>Total</b>  | <b>1727</b>      | <b>2061</b>      | <b>2097</b>      |
| (with full windfall allowance)  |                  |                  |                  |
| <b>Years supply<sup>6</sup></b>                                       | <b>11.0-17.8</b> | <b>13.1-21.2</b> | <b>13.4-21.6</b> |
| (based on 97-157 dwellings per annum, (with full windfall allowance)) |                  |                  |                  |

Figure 11: Source of housing supply

### Delivery of housing - 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 2018 which were approved in the third quarter of 2015.

During this quarter, 10 full permissions (11 dwellings) lapsed without being taken up for development – see Figure 12 below. This represents 15.9% of the 69 full planning permissions granted in 2015. 31 of these permissions have been taken-up to date.

| Location               | Lapsed Permissions Q3 2018 | Lapsed Permissions 2015 | Lapsed Dwellings Q3 2018 | Lapsed Dwellings 2015 |
|------------------------|----------------------------|-------------------------|--------------------------|-----------------------|
| Main Centres           | 9                          | 17                      | 10                       | 34                    |
| Local Centres          | 0                          | 0                       | 0                        | 0                     |
| Outside of the Centres | 1                          | 9                       | 1                        | 7                     |
| <b>Total</b>           | <b>10</b>                  | <b>26</b>               | <b>11</b>                | <b>41</b>             |

Figure 12: Permissions lapsing during the quarter and 2015

Note: Lapsed permissions 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.

Also during the third quarter of 2018, outline planning permission for 303 dwellings at Leale's Yard, The Bridge, lapsed.

<sup>6</sup> The 'Years Supply' is an indicator to illustrate how the current supply of housing through the planning system compares to the requirement of the Strategic Land Use Plan to provide a 5 year supply in the Island Development Plan (IDP) (at the time of the adoption of the Plan). This is not a target but tracks the progress of the implementation of the IDP. A supply of less than 5 years would indicate that further housing sites may be required to be allocated through a review of the IDP. A continuous supply of 5 years is not a requirement.

### 3. Employment Development

#### Introduction

The Island Development Plan has an objective to 'support a thriving economy'. The Plan makes provision for a range of new employment developments throughout the Island where they make a positive contribution to the sustainability of a strong local economy.

The indicators used in this monitoring reflect the Island Development Plan policy approach to employment uses:

Offices – the IDP's approach to office use is to focus this use in the Main Centres, where there are existing clusters of offices, while recognising the need for large floorplate office space with the allocation of an Office Expansion Area at Admiral Park (for floorplates over 1000m<sup>2</sup>). The IDP also seeks to retain existing offices in Main Centres but allows for smaller premises under 250m<sup>2</sup> to change use, to address an oversupply of, mainly tertiary, small office space. New offices are also supported in Local Centres where they are of an appropriate scale for the Local Centre concerned. Outside of the Centres, new office development is supported through conversion of redundant buildings only.

Industry and Storage & Distribution - the IDP's approach to Industry and Storage & Distribution reflects the findings of the Employment Land Study 2014 that the Island is now over-provided with industrial and storage and distribution premises. In managing change in this sector it is recognised that there remains a need to specifically protect some land for Industry and Storage & Distribution to ensure suitable land is available that can be readily developed for a range of industrial and storage/distribution purposes. The IDP, therefore, seeks to protect certain areas for industry and storage and distribution uses – Key Industrial Areas (KIAs) and Key Industrial Expansion Areas (KIEAs).

The IDP directs industry and storage uses toward the KIAs and KIEAs, and also supports industrial use elsewhere within the Main Centres. Within the Main Centres and Main Centre Outer Areas new industry and storage use is also possible through conversion of a redundant building. In Local Centres these uses are also supported where they are of an appropriate scale for the Local Centre concerned. Outside of the Centres, these uses are supported at the KIEA at La Villiaze, St Saviours, and on redundant glasshouse sites under certain circumstances and through conversion of redundant buildings.

The IDP supports, in principle, the continued use, extension, alteration and redevelopment of existing industrial and storage sites throughout the Island and is generally supportive of change of use away from employment uses outside of the KIAs.

The purpose of the quarterly employment monitoring is to monitor the supply of employment premises and land in the Island arising through the planning system and premises and land available to the market for let and/or for sale. The information on premises available to the market is provided every second quarter to match long term trends in monitoring and reflect the pace of change in the market. The monitoring does not include the implementation of permissions as change of use permissions can be carried out

without the need for a building regulations licence and some change of use can occur without the need for planning permission. In both cases the Planning Service will not have a record of commencement and completion of the change. The marketed premises data provides an alternative analysis of demand and includes the 'take-up' of premises.

The types of employment land and premises monitored are Offices (use classes 15, 16 and 17), Storage or Distribution (use classes 22 and 23) and Industrial (use classes 24, 25, 26 and 27).

It is recognised that other sectors, particularly retail and the visitor economy, make a significant contribution to employment in the Island. These uses are monitored on an annual basis as part of the Annual Monitoring Report.

### Approvals this period

Between 1<sup>st</sup> July 2018 and 30<sup>th</sup> September 2018 planning permission has been given for the following net change in floor space (m<sup>2</sup>):

| Use Class              | Financial & professional office (15) | Administrative office (16) | Temporary office (17) | General storage or distribution (22) | Special storage (23) | Light industry (24) | General industry (25) | Special industry (26) | Waste (27) | TOTAL |
|------------------------|--------------------------------------|----------------------------|-----------------------|--------------------------------------|----------------------|---------------------|-----------------------|-----------------------|------------|-------|
| Location               |                                      |                            |                       |                                      |                      |                     |                       |                       |            |       |
| Main Centres           | -42                                  | 29                         |                       | -39                                  |                      | -106                | -3101                 |                       | 3101       | -158  |
| Local Centres          |                                      |                            |                       |                                      |                      |                     |                       |                       |            |       |
| Outside of the Centres |                                      |                            |                       | 981                                  |                      |                     |                       |                       |            | 981   |
| TOTAL                  | -42                                  | 29                         |                       | 942                                  |                      | -106                | -3101                 |                       | 3101       | 823   |

Figure 13: Net change in floor space (m<sup>2</sup>) by Use Class granted planning consent between July-September 2018

In summary, offices - net total of -13m<sup>2</sup> permitted; industry - net total of -106m<sup>2</sup> permitted; storage or distribution - net total of 942m<sup>2</sup> permitted.

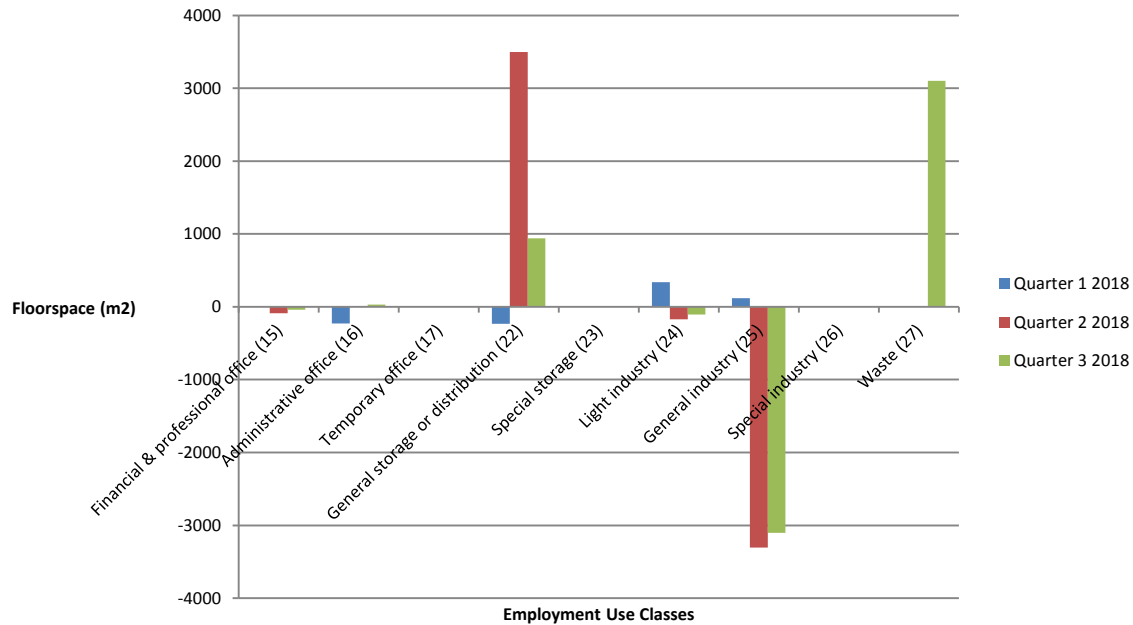


Figure 14: Employment floorspace approved in year to date

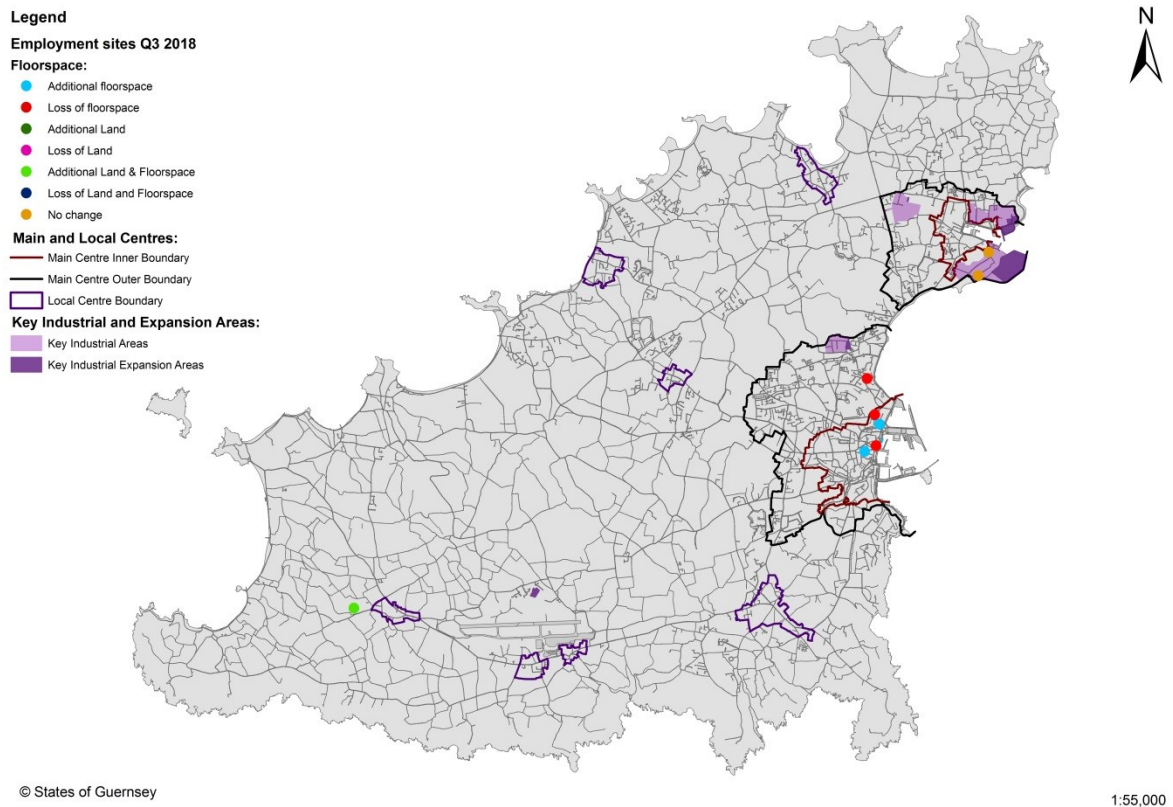


Figure 15: Employment sites approved in quarter

- There were 8 permissions granted in the quarter that included a change in floorspace
- 7 permissions were in Main Centres. These were for change of use of archive storage to residential; residential to office use; office use to retail use; retail use to office

use; and, light industry to a charity meeting place. 2 permissions were to change use from general industry to the storage and processing of waste

- 1 permission was Outside of the Centres to change the use of agriculture buildings to a self-storage facility.

### Trends in supply of Employment Floorspace

The supply of employment land and floorspace through the planning system is often irregular, with applications for relatively large floor areas being submitted on an infrequent basis. The following table indicates, in broad terms, increases and decreases in floor space for each use class granted planning permission over the quarter in comparison to previous periods:

| Use Class                            | Change over 3 <sup>rd</sup> quarter 2018 | Change over 2 <sup>nd</sup> quarter 2018 | Change over 1 <sup>st</sup> quarter 2018 | Change over 4 <sup>th</sup> quarter 2017 |
|--------------------------------------|--|--|--|--|
| Financial & professional office (15) | ↓  | ↓  | -  | ↑  |
| Administrative office (16)           | ↑  | -  | ↓  | ↓  |
| Temporary office (17)                | -  | -  | -  | -  |
| General storage or distribution (22) | ↑  | ↑  | ↓  | -  |
| Special storage (23)                 | -  | -  | -  | -  |
| Light industry (24)                  | ↓  | ↓  | ↑  | ↑  |
| General industry (25)                | ↓  | ↓  | ↑  | -  |
| Special industry (26)                | -  | -  | -  | -  |
| Waste (27)                           | ↑  | -  | -  | -  |

Figure 16: Net change in floor space by Use Class granted planning consent over the period

The above figures should be taken as a snapshot in time. Analysis of changes over a longer period of time will be provided in the Annual Monitoring Reports to give a more accurate picture of trends.

### Summary: Employment Land

The Employment Land Study 2014 forecasts a need for around 2.26ha less industrial and storage & distribution land (sites with or without premises) over the 10 year life of the Island Development Plan. This quarter a net total of 0.4ha of land was given permission for an industrial or storage or distribution use. This compares with a loss of -0.03ha in the previous quarter.

The sites added / lost from the supply of industrial or storage or distribution land were:

- Change the use of agriculture buildings to a self-storage facility at Rue De Quanteraine, St. Pierre Du Bois (0.42ha).



|                                   | Net change<br>over 3 <sup>rd</sup><br>quarter 2018 | Net change<br>over 2 <sup>nd</sup><br>quarter 2018 | Net change<br>over 1 <sup>st</sup><br>quarter 2018 | Net change<br>over 4 <sup>th</sup><br>quarter 2017 |
|-----------------------------------|--|--|--|--|
| Industrial Land                   | -  | -0.034   | 0.02   | 0.10   |
| Storage &<br>Distribution<br>Land | 0.42   | 0.003  | 0.44   | -  |
| <b>Total</b>                      | 0.42   | -0.031   | 0.46   | 0.10   |

Figure 17: Net change in industrial and storage & distribution land over the period (hectares)

## Appendix 1 – Pipeline Housing Supply – detailed ‘Centres’ analysis

| Location                 | Number of dwellings                         |                        |                       | Total      |
|--------------------------|---|------------------------|-----------------------|------------|
|                          | Full permissions<br>(work not<br>commenced) | Outline<br>permissions | Under<br>Construction |            |
| St Peter Port MC         | 54  | -                      | 94                    | 148        |
| St Peter Port MCOA       | 53  | 16                     | 97                    | 166        |
| St Sampsons / Vale MC    | 112   | -                      | 9                     | 121        |
| St Sampsons / Vale MCOA  | 46  | -                      | 58                    | 104        |
| <b>Total MCs</b>         | <b>265</b>                                  | <b>16</b>              | <b>258</b>            | <b>539</b> |
| Cobo Local Centre        | 4   | -                      | -                     |            |
| Forest Local Centre      | -   | -                      | -                     |            |
| Forest West Local Centre | -   | -                      | -                     |            |
| L'Aumone Local Centre    | -   | -                      | -                     |            |
| L'Islet Local Centre     | 4   | -                      | -                     |            |
| St Martin's Local Centre | 40  | -                      | 2                     |            |
| St Peter's Local Centre  | -   | -                      | -                     |            |
| <b>Total LCs</b>         | <b>48</b>                                   | <b>-</b>               | <b>2</b>              | <b>50</b>  |
| Outside of the Centres   | 126   | -                      | 67                    | 193        |
| <b>Total</b>             | <b>439</b>                                  | <b>16</b>              | <b>327</b>            | <b>782</b> |

MC - Main Centre

MCOA – Main Centre Outer Area

## Legend

## Pipeline Q3 2018

## Number of dwellings:

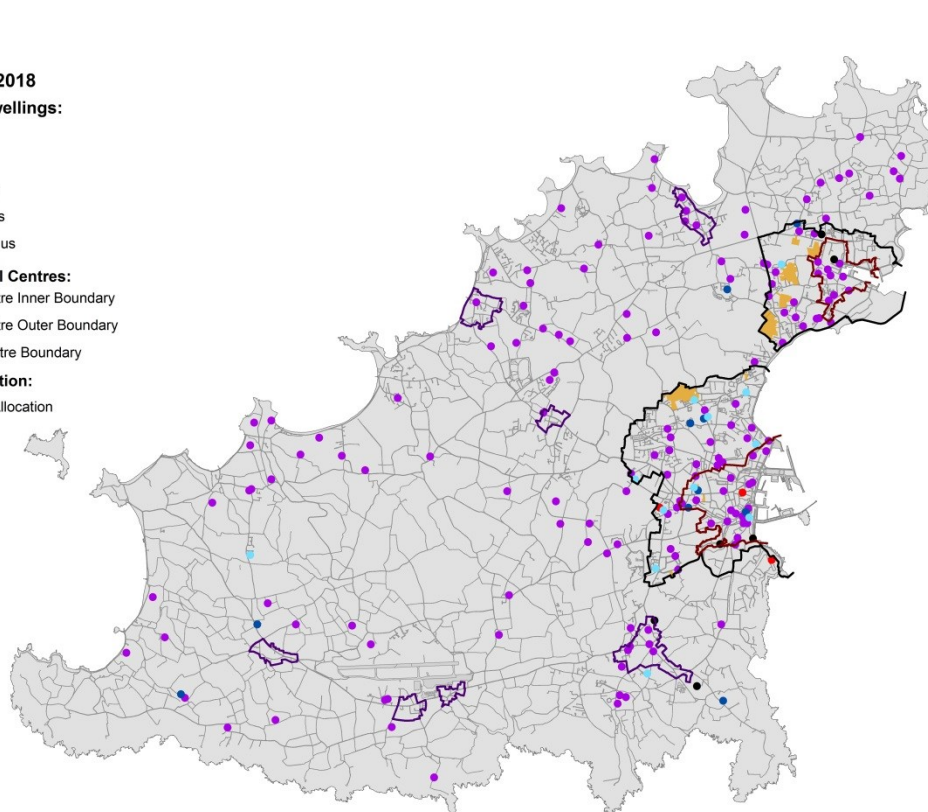
- Loss
- 1-5 units
- 6-10 units
- 11-19 units
- 20 units plus

## Main and Local Centres:

- Main Centre Inner Boundary
- Main Centre Outer Boundary
- Local Centre Boundary

## Housing Allocation:

- Housing Allocation



**Contact Us** for further information and advice at: Planning Service, Sir Charles Frossard House, St Peter Port. GY1 1FH Telephone 01481 717200 Email [planning@gov.gg](mailto:planning@gov.gg)

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Copies of the text of the Island Development Plan (2016) are available from Sir Charles Frossard House. Copies of legislation are available from the Greffe. Electronic copies are also available at [www.guernseylegalresources.gg](http://www.guernseylegalresources.gg).