



Island Development Plan - Quarterly Monitoring Report

Quarter 3 - 2021



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 housing and employment related development through the planning system. These are of 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. 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 (IDP) 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 SLUP, the IDP ensures that there is a minimum 5-year land supply to meet the annual requirement for new homes to meet the Island's housing needs. This is achieved with the allocation of 15 sites in the IDP specifically for housing development, all within either a Main Centre or Main Centre Outer Area which, combined with an allowance for windfall¹ development on other sites and existing permissions, make up the five-year land supply requirement.

The annual requirement for new homes is based on the States' Strategic Housing Indicator. When the IDP was adopted in November 2016, this indicator (then referred to as a 'target') was set at making effective provision for 300 new dwellings each year; the target having been in place since 2002.

In July 2018, the States resolved to agree the States' Strategic Housing Indicator be set at completing 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 completing 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. This represented a shift in the strategic annual housing requirement indicator from numbers of planning permissions for new residential units to numbers of new residential units completed and built. This did not change the requirement for the IDP to put in place policies for the effective provision of the annual housing requirement through planning permissions granted.

The primary purpose of the quarterly housing monitoring is to monitor whether there is a maintained minimum 2-year supply of housing permissions within the 'pipeline' that are able to come forward for development at any one time (known as the pipeline supply) so that effective provision is made to meet the requirements of the strategic indicator. Given the current annual indicator for the completion of 97-157 additional new dwellings per year, the pipeline supply requirement equates to planning permissions for at least 194-314 new

¹ 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.

dwellings (136-230 private market, 58-84 Affordable Housing). 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-up² 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.

‘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 – Private Market | Number of dwellings | | | |
|---------------------------------------|---------------------|---------------|------------------------|------------|
| | Main Centres | Local Centres | Outside of the Centres | Total |
| Full permissions (work not commenced) | 113 | 11 | 60 | 184 |
| Outline permissions | 0 | 0 | 0 | 0 |
| Under Construction | 199 | 30 | 70 | 299 |
| Total | 312 | 41 | 130 | 483 |
| Source of Supply – Affordable Housing | | | | |
| Full permissions (work not commenced) | 0 | 0 | 0 | 0 |
| Outline permissions | 0 | 0 | 0 | 0 |
| Under Construction | 6 | 0 | 10 | 16 |
| Total | 6 | 0 | 10 | 16 |
| Pipeline Supply | 499 | | | |

Figure 1: Pipeline Housing Supply

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.

² The ‘take-up’ of planning permissions refers to developments with planning permission that have commenced i.e. building work has begun on site.

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

| Site | Dwellings | Decision | Progress | Centre |
|---|-----------|----------|--------------------|------------------------|
| Rue Du Tertre/La Route Du Braye, Vale (sheltered housing) | 47 | 4/11/14 | Under construction | St Sampson / Vale MCOA |
| Les Blanches, St. Martin (sheltered and affordable housing) | 26 | 27/11/17 | Under construction | Outside of the Centres |
| Springburn (Former CI Tyres), La Charroterie, St Peter Port | 22 | 19/1/21 | Under construction | St Peter Port MC |

Figure 2: Largest permissions in the pipeline

The remainder of the pipeline supply is made up of 404 dwellings.

Third Quarter 2021 - Permissions

Approvals this quarter

Full planning permission was granted for a total of 65 additional dwellings on 24 sites during the third quarter of 2021.

The average number of dwellings approved per quarter over the past 3 years was 41 units (not including outline permissions).

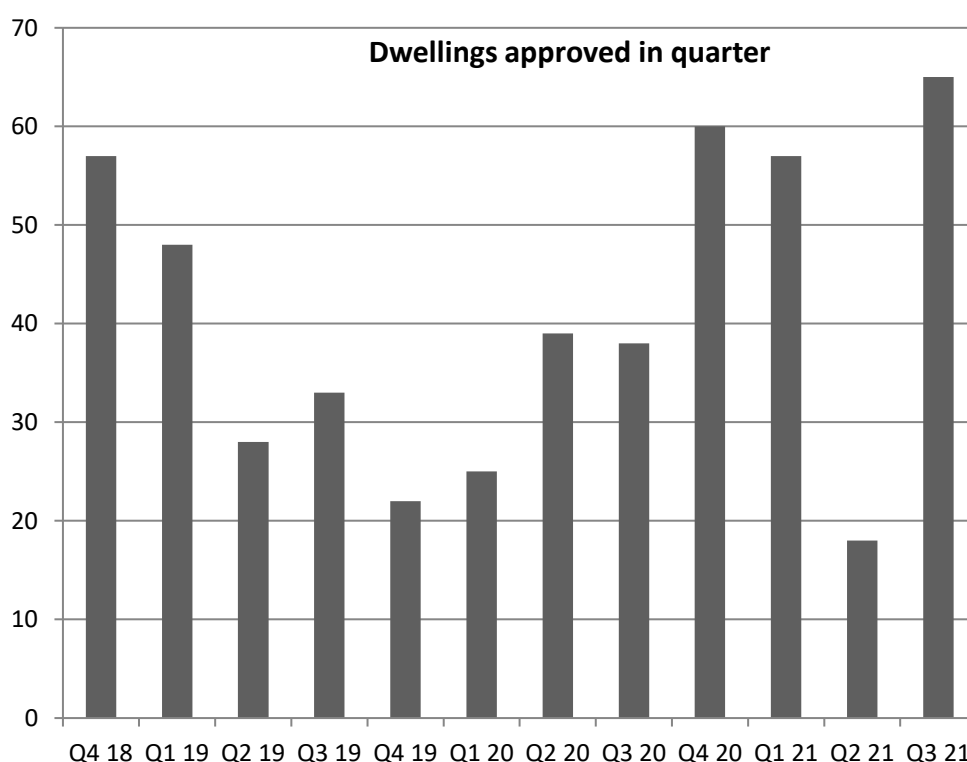


Figure 3: Dwellings approved in quarter – 3-year period (excluding outline permissions)

The largest planning permissions granted this quarter were at the allocated housing site Bougourd Ford, The Grange, St Peter Port (15 terraced houses) and revisions to previous approvals at Brock Road, St Peter Port (17 flats) and Rue De La Bellee, Torteval (8 flats).

Location of Development

The approvals this quarter represent a split of 50 dwellings in Main Centres, 1 in Local Centres and 14 Outside of the Centres.

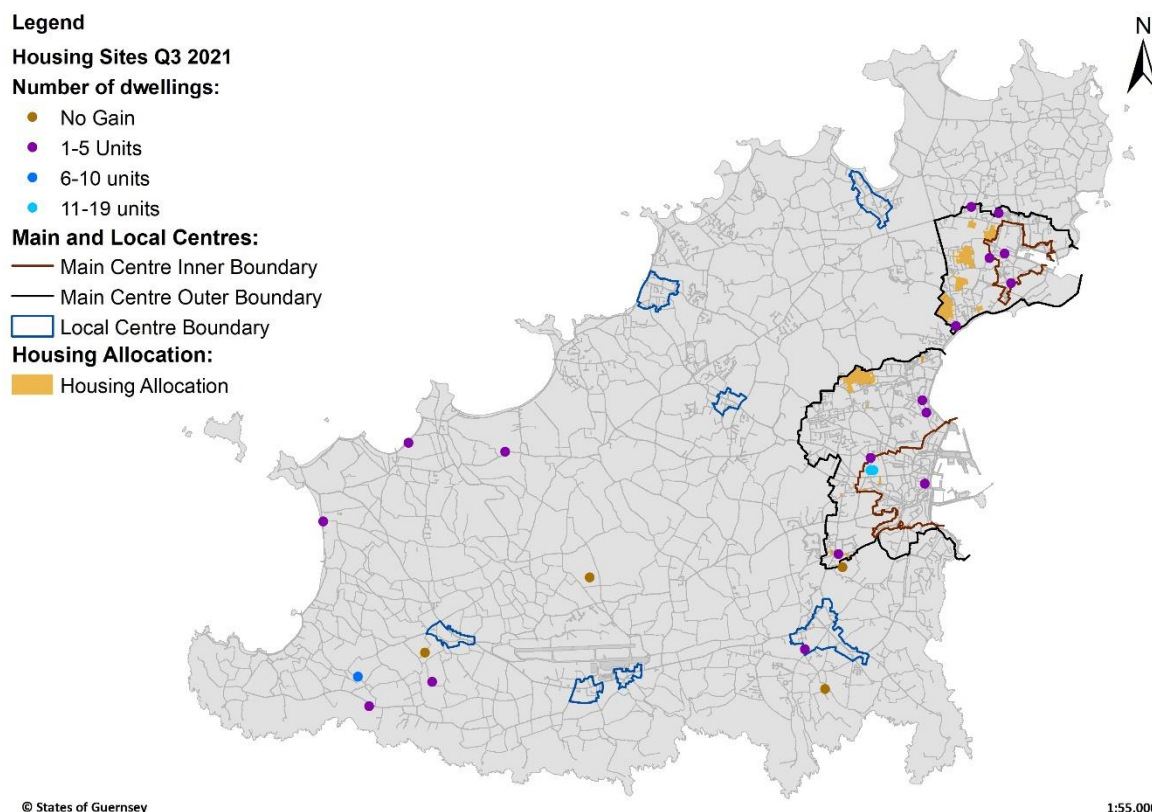


Figure 4: Dwellings approved in quarter

Brownfield / Greenfield development

The IDP 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.

4 dwellings were permitted on greenfield sites this quarter, these permissions include: convert stables into a dwelling (Rue Du Dos D`Ane, Castel – located Outside of the Centres) and erect 3 dwellings (Ronde Cheminee, St. Sampson – in a Main Centre).

Types of development and dwellings permitted

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

| Type of development | Use Class | | | | | Total |
|---------------------|---------------------|-------------------------------------|-----------|------------------------------------|----------------------------------|-----------|
| | Detached house (1a) | Semi-detached / terraced house (1b) | Flat (2) | Sheltered housing (3) ³ | House in Multiple Occupation (6) | |
| New build | 2 | 2 | 0 | 0 | 0 | 4 |
| Re-develop | 2 | 19 | 2 | 0 | 0 | 23 |
| Sub-division | 0 | 2 | 0 | 0 | 0 | 2 |
| Conversion | 5 | 2 | 29 | 0 | 0 | 36 |
| Loss of units | 0 | 0 | 0 | 0 | 0 | 0 |
| Total | 9 | 25 | 31 | 0 | 0 | 65 |

Figure 5: Types of development and dwellings permitted

The numbers of dwellings shown in Figure 5 relates to the net number of new 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. 75 new dwellings will replace 10 dwellings as shown in Figure 7, giving the net figure of 65 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 | Total |
| Detached | 1 | 5 | 5 | 2 | 0 | 13 |
| Semi-detached | 1 | 5 | 6 | 0 | 0 | 12 |
| Terraced | 1 | 4 | 12 | 0 | 0 | 17 |
| Flat | 24 | 7 | 2 | 0 | 0 | 33 |
| Sheltered | 0 | 0 | 0 | 0 | | |
| Total | 27 | 21 | 25 | 2 | 0 | 75 |

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:

| Unit type | Number of bedrooms - Replaced Dwellings | | | | | |
|---------------|---|----------|----------|----------|----------|-----------|
| | 1 | 2 | 3 | 4+ | HMO | Total |
| Detached | 0 | 3 | 4 | 3 | 0 | 10 |
| Semi-detached | 0 | 0 | 0 | 0 | 0 | 0 |
| Terraced | 0 | 0 | 0 | 0 | 0 | 0 |
| Flat | 0 | 0 | 0 | 0 | 0 | 0 |
| Sheltered | 0 | 0 | 0 | 0 | | 0 |
| Total | 0 | 3 | 4 | 3 | 0 | 10 |

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

³ 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.

3 units of specialised housing were permitted this quarter at Green Acres, Les Hubits, St. Martin. 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 Housing⁴

IDP 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 and no other Affordable Housing was permitted.

To date, under the IDP, 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, 59 Affordable Housing units have been permitted under other IDP 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 (18 private market, 0 Affordable Housing). This is 6% of the total number of dwellings under construction (315). Figure 8 shows that the total number of dwellings completed construction this quarter is 4 (4 private market, 0 Affordable Housing).

| | Commencements Private | | Commencements Affordable | | Completions Private | | Completions Affordable | |
|---|-----------------------|------------|--------------------------|------------|---------------------|------------|------------------------|------------|
| | Sites | Units | Sites | Units | Sites | Units | Sites | Units |
| Main Centres | 5 | 6 | - | - | 2 | 3 | - | - |
| Local Centres | 2 | 3 | - | - | - | - | - | - |
| Outside Centres | 6 | 9 | - | - | 2 | 1 | - | - |
| Total | 13 | 18 | - | - | 4 | 4 | - | - |
| Running total since IDP adoption | 238 | 437 | 12 | 167 | 170 | 373 | 14 | 184 |

Figure 8: Developments commencing and completing during the quarter

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

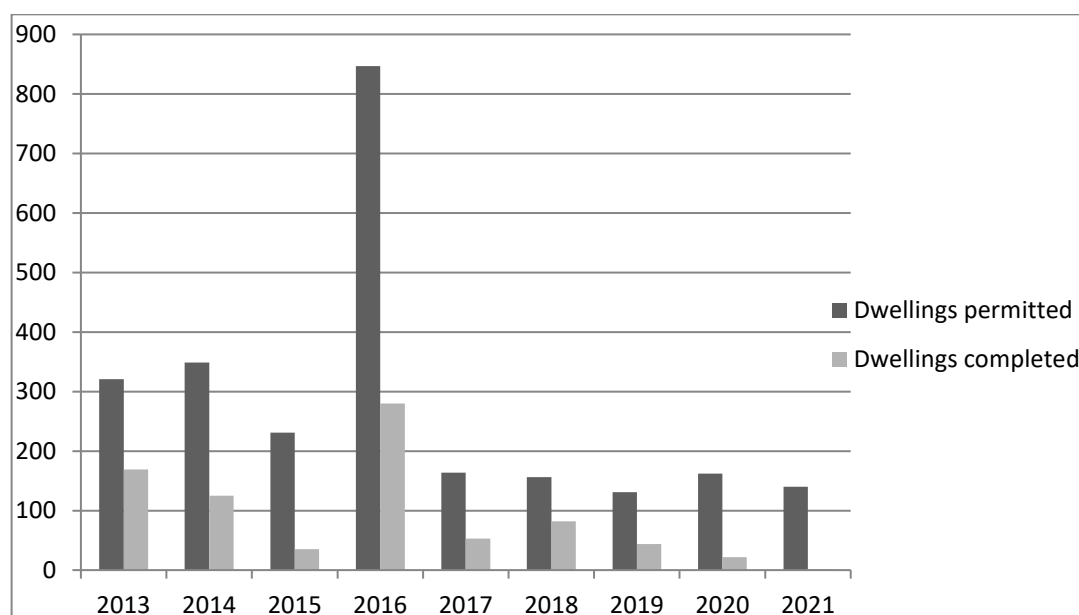


Figure 9: Dwellings permitted (net) and dwellings completed from the permissions in each year (2013 to date)

Delivery of housing – Source of the supply

In accordance with the requirements of the Strategic Land Use Plan the IDP identifies a minimum five-year land supply for housing. At the time the IDP 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.

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 499 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 | Development Framework adopted | | |
| Bougourd Ford | Permission 2021 | 15 | 15 |
| Braye Lodge | Development Framework adopted | | |
| Cleveleys Vinery | Development Framework adopted | | |
| Education offices | Development Framework adopted | | |
| Priaulx Garage | Development completed | | 19 |
| Franc Fief | None | | |
| King's Club | Under construction | | 13 |
| La Vrangue | Permissions 2019 (Vrangue Manor) and 2020 (Route De La Ramee) - not part of the main site for future development | | 5 |
| Les Bas Courtils | Development Framework adopted Permission (house / barn) 2017 – lapsed | | |
| Maurepas Road | Under construction | | 6 |
| Petites Fontaines | Permission 2016 – lapsed | | |
| Pointues Rocques | Development Framework adopted | | |
| Saltpans | Development Framework adopted | | |
| Warry's Bakery | Development completed | | 20 |
| Total units (net) permitted on allocations | | | 78 |

Figure 10: Progress of housing site allocations

This quarter 15 additional dwellings were permitted on an allocated housing site. To date 78 dwellings have been permitted on allocated sites. 39 of these dwellings form part of the pipeline supply. Taking account of updated yields from approved Development Frameworks, the remaining supply from allocated sites is at least an estimated 649 dwellings.

C. Windfall allowance

The 'windfall' allowance⁵ (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 50 dwellings were permitted on windfall sites. To date since the adoption of the IDP 709 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 as part of the review of the IDP.

Housing supply

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

| Source of housing supply | Q3 2021 | Q2 2021 | Q1 2021 | Q4 2020 |
|--|----------|----------|----------|----------|
| Dwellings with permission / under construction | 499 | 471 | 536 | 540 |
| Remaining capacity on allocated sites | 649 | 664 | 664 | 655 |
| Windfall allowance | 150-300 | 150-300 | 150-300 | 150-300 |
| Total (With full windfall allowance) | 1448 | 1435 | 1500 | 1495 |
| Year's supply ⁶ (Based on 97-157 dwellings per annum, with full windfall allowance) | 9.2-14.9 | 9.1-14.8 | 9.6-15.5 | 9.5-15.4 |

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 2021 which were approved in the third quarter of 2018.

During this quarter, 5 full planning permissions (1 dwelling) lapsed without being taken up for development – see Figure 12 below. 96 full planning permissions were granted in 2018. 59 of these permissions have been taken-up.

⁵ 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.

⁶ 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.

| Location | Lapsed Permissions Q3 2021 | Lapsed Permissions 2018 | Lapsed Dwellings Q3 2021 | Lapsed Dwellings 2018 |
|------------------------|----------------------------|-------------------------|--------------------------|-----------------------|
| Main Centres | 2 | 4 | 0 | 3 |
| Local Centres | 0 | 1 | 0 | 1 |
| Outside of the Centres | 3 | 8 | 1 | 5 |
| Total | 5 | 13 | 1 | 9 |

Figure 12: Permissions lapsing during the quarter and 2018

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.

3. Employment Development

Introduction

The Island Development Plan (IDP) 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 1000m²). The IDP also seeks to retain existing offices in Main Centres but allows for smaller premises under 250m² 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 (also see the Employment Land Study, Update Report, 2020) 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. 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 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).

Approvals this period

Between 1st July 2021 and 30th September 2021 planning permission has been given for the following net change in floor space (m²):

| 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 |
|------------------------|--------------------------------------|----------------------------|-----------------------|--------------------------------------|----------------------|---------------------|-----------------------|-----------------------|------------|-------|
| Main Centres | | 584 | | 264 | | | -579 | | | 269 |
| Local Centres | | | | | | | | | | |
| Outside of the Centres | | | | 65 | | 649 | | | | 714 |
| TOTAL | | 584 | | 329 | | 649 | -579 | | | 983 |

Figure 13: Net change in floor space (m²) by Use Class granted planning consent between July-September 2021

In summary, offices - net total of 584m² permitted; storage or distribution - net total of 329m² permitted; industry - net total of 70m² permitted.

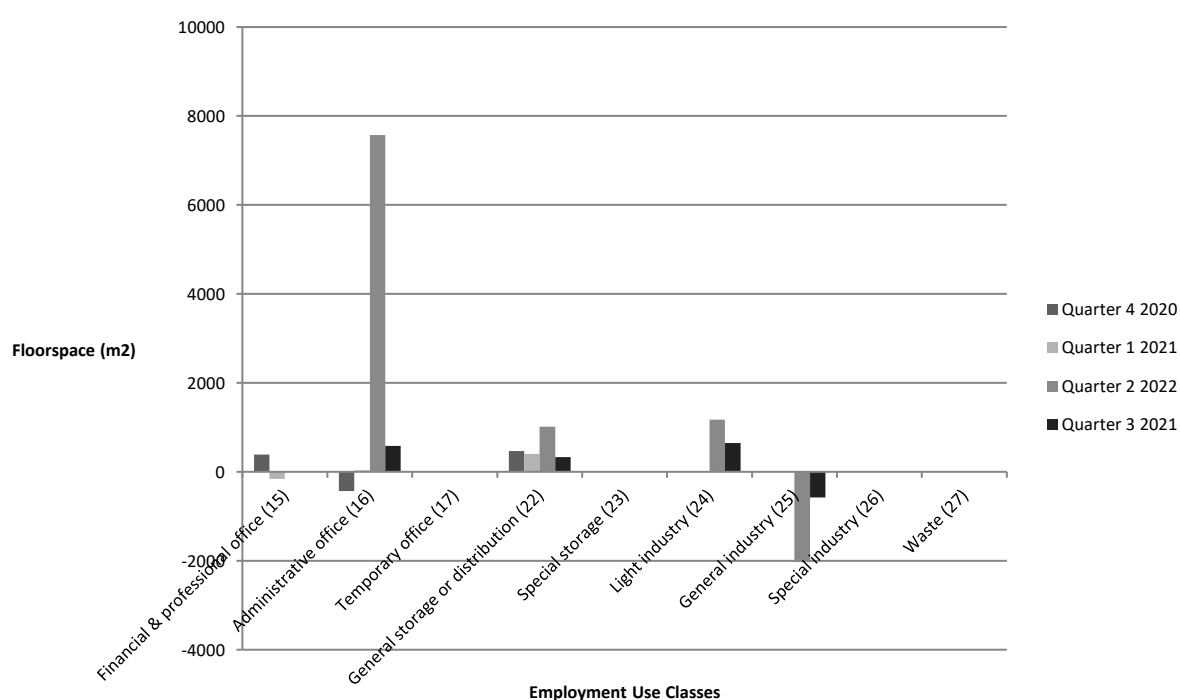


Figure 14: Employment floorspace approved

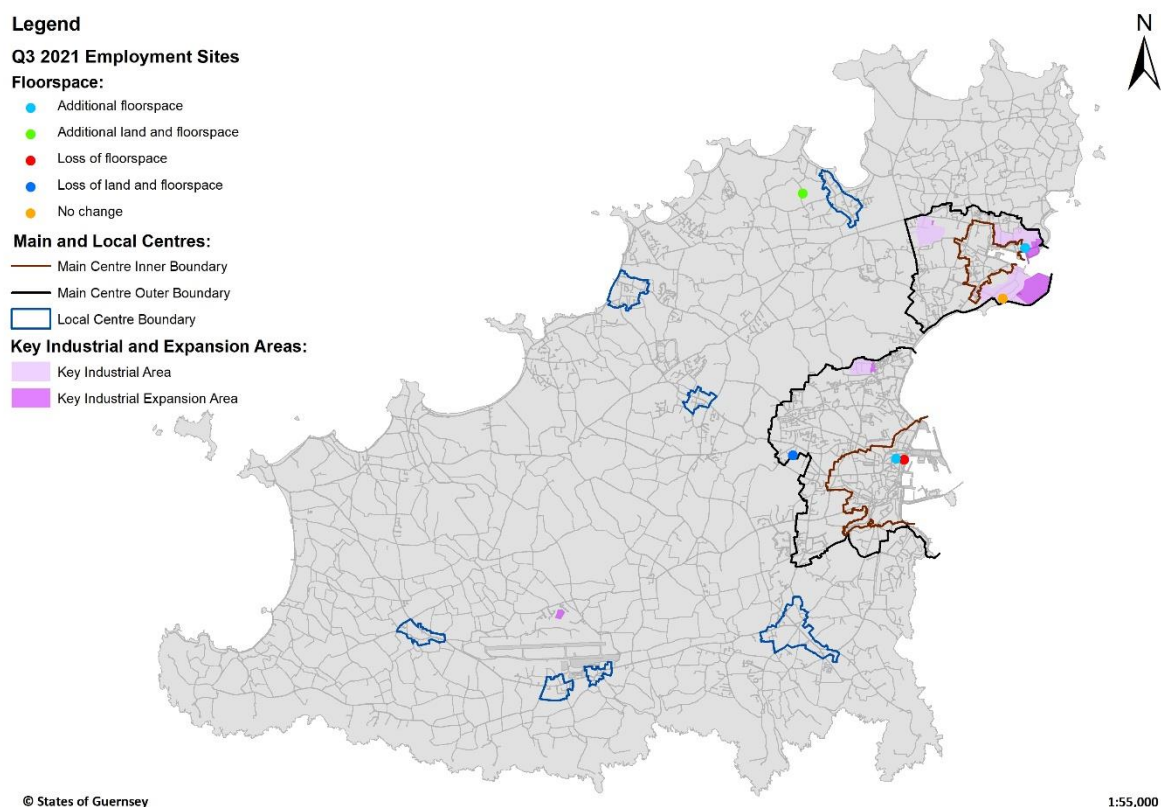


Figure 15: Employment sites approved in quarter

There were 6 permissions granted in the quarter that included a change in floorspace:

- 5 permissions were in Main Centres, these were to change the use of a medical centre to an office, change the use of an office to a public amenity use, change the use of a storage & distribution building to a public amenity use, change the use of a building from general industry to storage & distribution, and to install an additional portacabin.
- There were no permissions in a Local Centre.
- 1 permission (a Certificate of Lawful Use) was Outside of the Centres, this was to regularise the use of the land for the storage of vehicles, materials and boats (Use Class 22) and for the use of the buildings for the storage (Use Class 22) and for the maintenance (Use class 24) of vehicles, materials and boats.

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 | 2017 | | | | 2018 | | | | 2019 | | | | 2020 | | | | 2021 | | |
|--------------------------------------|------|---|---|---|------|---|---|---|------|---|---|---|------|---|---|---|------|---|---|
| | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 |
| Financial & professional office (15) | ↓ | ↓ | - | ↑ | - | ↓ | ↓ | - | ↓ | - | - | - | ↓ | - | - | ↑ | ↓ | ↑ | - |
| Administrative office (16) | ↑ | ↑ | ↓ | ↓ | ↓ | - | ↑ | ↓ | ↑ | ↑ | ↓ | ↑ | ↑ | ↓ | ↓ | ↓ | ↑ | ↑ | ↑ |
| Temporary office (17) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| General storage/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 0.1167ha of land was given permission for an industrial or storage & distribution use. This compares with a gain of 0.251ha in the previous quarter.

| | Running total since IDP adoption | Net change over 3 rd quarter 2021 | Net change over 2 nd quarter 2021 | Net change over 1 st quarter 2021 | Net change over 4 th quarter 2020 |
|-----------------------------|----------------------------------|--|--|--|--|
| Industrial Land | 1.1137 | 0.132 | 0 | 0 | 0 |
| Storage & Distribution Land | 3.68066 | -0.0153 | 0.251 | 0 | 0.0836 |
| Total | 4.79436 | 0.1167 | 0.251 | 0 | 0.0836 |

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 (work not commenced) | | Outline permissions | | Under Construction | | |
| | PM | AH | PM | AH | PM | AH | |
| St Peter Port MC | 47 | - | - | - | 72 | - | 119 |
| St Peter Port MCOA | 29 | - | - | - | 55 | 6 | 90 |
| St Sampson / Vale MC | 10 | - | - | - | 5 | - | 15 |
| St Sampson / Vale MCOA | 27 | - | - | - | 67 | - | 94 |
| Total MCs | 113 | - | - | - | 199 | 6 | 318 |
| Cobo Local Centre | 4 | - | - | - | 27 | - | 31 |
| Forest Local Centre | - | - | - | - | - | - | - |
| Forest West Local Centre | - | - | - | - | - | - | - |
| L'Aumone Local Centre | - | - | - | - | - | - | - |
| L'Islet Local Centre | 6 | - | - | - | - | - | 6 |
| St Martin's Local Centre | 2 | - | - | - | 3 | - | 5 |
| St Peter's Local Centre | -1 | - | - | - | - | - | -1 |
| Total LCs | 11 | - | - | - | 30 | - | 41 |
| Outside of the Centres | 60 | - | - | - | 70 | 10 | 140 |
| Total | 184 | - | - | - | 299 | 16 | 499 |

MC – Main Centre

MCOA – Main Centre Outer Area

PM – Private Market

AH – Affordable Housing

Legend

Q3 2021 Housing Pipeline

Number of dwellings:

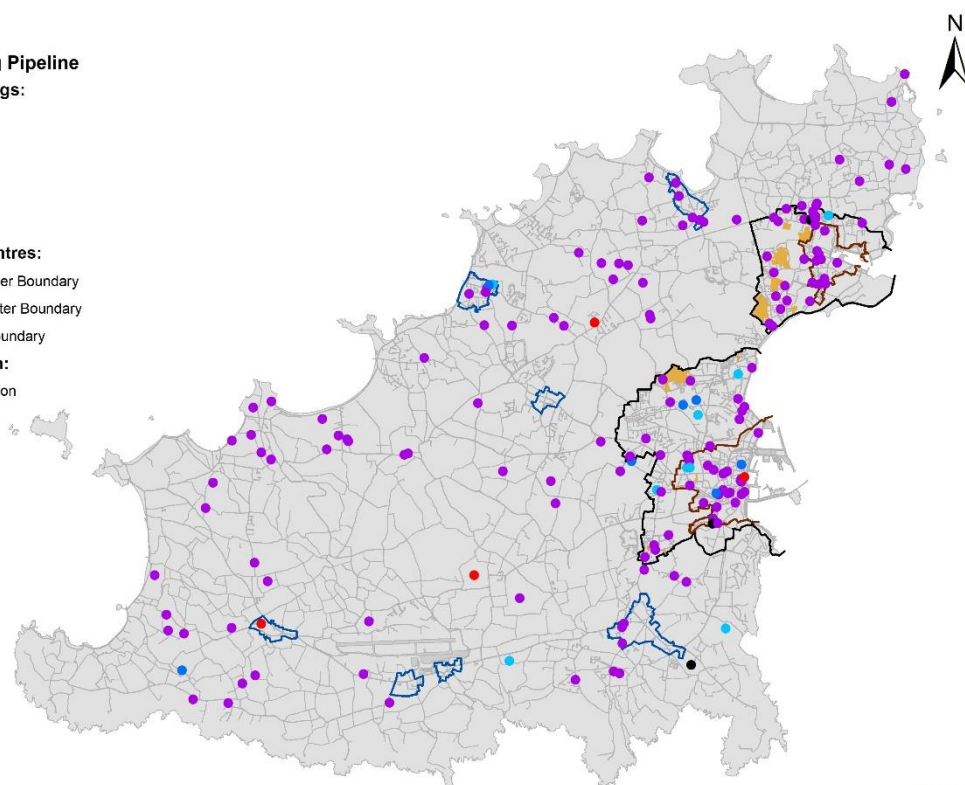
- Loss
- 1-5 units
- 6-10 units
- 11-19 units
- 20 plus units

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 226200 Email planning@gov.gg

This monitoring report is issued by the Planning Service for information only. It does not form part of the Island Development Plan (2016). The Development & Planning Authority does not accept any liability for loss or expense arising out of the provision of, or reliance on, any information given. You are recommended to seek advice from an independent professional advisor where appropriate.

Have you visited our website? Go to www.gov.gg/planningandbuilding for monitoring reports, the Island Development Plan, technical reports, guidance material and other planning information, including how to obtain pre-application advice and how to submit a planning application.

Copies of the text of the Island Development Plan (2016) are available from the Planning Service. Copies of legislation are available from the Greffe. Electronic copies are also available at www.guernseylegalresources.gg