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States of Jersey

2011 Island Plan: interim review
Examination in Public

# Statement: Housing – demand and supply revisions

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**The Inspector, Mr Shepley, raised the following query in an email to the Department on 31st December 2013;**

*There is confusion because as the States say in response to Pioneer the data sources mentioned in the proposed revisions are not all up to date.*

*But in Table 1, on the face of it, there are some issues and in order to help me sort them out quickly I'd be grateful for the States' comments*

*First, the 3rd column heading refers to total change over 10 years. I assume this should be 8 years and that it simply has not been updated?*

*Secondly – the inward migration figures in the middle line. These I assume are based on the 150 households/year assumption (para 6.19). This makes sense in Col 1 – 450 h/holds in 3 years 2013-15. But Col 2 shows 900 h/holds in 2016-2020 (5 years); I would have expected 150x5 = 750. I'm sure there is a simple explanation for this and I'd be grateful to know what it is, to save me the trouble of searching for it. Could you ask the States please?*

*Third – please could they also explain exactly where I find the justification for the two 600 figures in the first line of the table?*

**The following statement, together with the proposed revisions to the relevant sections of the revised Housing chapter (attached), addresses these queries.**

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1. ***First, the 3rd column heading refers to total change over 10 years. I assume this should be 8 years and that it simply has not been updated?***

   **<u>Response:</u>**

   This is an error and the text has been corrected, i.e. the column heading should refer to **'8 years'** (not '10 years') to correctly relate to the remaining Plan period upon this data is based (i.e. 2012-2020).

2. ***Secondly – the inward migration figures in the middle line. These I assume are based on the 150 households/year assumption (para 6.19). This makes sense in Col 1 – 450 h/holds in 3 years 2013-15. But Col 2 shows 900 h/holds in 2016-2020 (5 years); I would have expected 150x5 = 750. I'm sure there is a simple explanation for this and I'd be grateful to know what it is, to save me the trouble of searching for it. Could you ask the States please?***

   **<u>Response:</u>**

   The Chief Statistician of the States Statistics Unit, Duncan Gibaut, has confirmed that this error was derived from incorrect assumptions about timescales.;
   "*The numbers used in table 6.1, which are derived from population modelling were for the periods 2012-2015 and 2016-**2021** (year-ends)…since I interpreted the period covered by (the latest review of) the Island Plan as 2011-**2021** (year-ends). For year-end*

*2020, the number of net migrant households for "Period 2" of Table 6.1 should indeed be 750 (and not 900). The right hand column of row two should then be 1,200 and the overall total (bottom right cell) should be 2,300.*

*This also means that Table 6.2 should have a figures of 1,300 and 2,300 (instead of 1,450 and 2,450, respectively)....and a total of 3,300 (instead of 3,450)."*

*Duncan Gibaut 3/01/14*

This has now been corrected in the attached revised housing section (amendments highlighted and comments included where relevant).

3. ***Third – please could they also explain exactly where I find the justification for the two 600 figures in the first line of the table?***

The two figures of 600 in the top row of Table 6.1 are additional households due to the effect of assumed continued reduction in average household size (derived as an extrapolation of Fig 3.1 on page 21 of the 2011 Census Report).

These numbers have been rounded and are not linear, i.e. the rate of decline in household size is slowing over time and so the numbers over the first 3 year period and second 5 year period are very similar as a result.

**Impact of revision**

The impact of this revision is to reduce the overall demand for housing by 150 units (from 3,450 to 3,300) over the remaining Plan period (8 years - up to 2020).

The estimates of demand for affordable housing are still valid and remain unchanged.

**Other changes**

The Minister is also proposing that the revised Plan be amended to ensure that it reflects the most up-to-date information available: the Minister will issue a schedule of proposed amendments to reflect this. Some of these proposed amendments concern housing supply, as already referenced in the Minister's statements about housing (Day 1: Q4).

One of the States-owned housing sites, at Ann Court, was originally estimated to provide 140 affordable housing units; however recent site analysis has now determined that an additional 50 units could be developed on this site.

It is considered useful to make reference to this here as this has the effect of increasing the overall supply of housing by 50 units to 1,170 affordable (Category A) housing and a total housing supply of 3,720 over the Plan period.

**Net effect**

Taking both the demand and supply changes together, the overall impact results in a predicted higher overall surplus of +420 units, made up of 170 affordable housing (Category A) and 250 market housing (category B).

This potential surplus should be sufficient to meet identified requirements for Category A affordable homes and Category B market housing over the Plan period, providing a buffer of about 15%. UK planning guidance[1] suggests local planning authorities should aim to provide a buffer of between 5-20% in their five year housing land supply, so Jersey's position is considered to be reasonable in comparison.

[1] National Planning Practice Guidance: see http://planningguidance.planningportal.gov.uk/

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## Housing requirements

**6.15** Requirements over the remainder of the Plan period will arise from:

- existing households moving home within Jersey;
- new households forming who are currently sharing homes with other households,
- new households forming through demographic changes; and
- the net effect of people moving into or leaving Jersey.

**6.16** Within each of these categories there will be those who cannot gain access to homes in the open market and thus need 'affordable' homes. There will also be special requirements for housing, such as for those with disabilities and sheltered housing for elderly people.

**6.17** Planning to meet the number and type of homes required by anticipated changes in the Island's population and by the latent demand for homes within the population has, of necessity, to involve assumptions and estimations about change in a range of factors over the Plan period. The two key factors which have most influence over the requirements for homes over the Plan period are:

- the size and make-up of the Island's population,
- people's housing aspirations (and their ability to realise them).

## Population

**6.18** The size of the Island's population will crudely influence the number of homes that will need to be provided during the Plan period. Against a demographic background of falling birth rates and falling death rates - an ageing population - the challenge for Jersey is to maintain a working age population that allows the economy to function and for services to be sustained, without threatening the Island's environment, infrastructure and quality of life.

**6.19** The States Strategic Plan 2009-2014 established a maximum inward migration at a rolling five year average of no more than 150 heads of household per annum (which equates to an overall increase of approximately 325 people each year), to be reviewed every three years. [2]

**6.20** The 2011 Census showed population levels up from 87,186, in 2001, to 97,857 in 2011. The 2012 Strategic Plan acknowledged that *'many Islanders are concerned that immigration places undue pressure on our environment'* and outlined in response that permissions for non locally qualified migrants would be limited to support local employment, but that permissions for essential employees would continue where high economic and social value could be demonstrated. The Council of Ministers recognises that further analysis of this issue is required and proposes to review immigration and population objectives for Jersey as part of the development of a Long Term Plan to be brought forward in the Spring 2014 follow

2 States Strategic Plan 2009-2014, Priority 5: limit population growth (pp16)

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a period of public engagement. Until such time as this process is complete, the Island Plan will continue to be based on the framework (total of +150 household per annum/325 people per annum) set by the 2009-14 Strategic Plan. By way of comparison, in 2012, net immigration of persons with access to qualified housing (permanent J category Households) was +400, which equates to +155 such households.

**6.21** On the basis of this maximum target for the Island's population, and using Jersey-relevant data for fertility and mortality, the States of Jersey Statistics Unit has developed a Jersey Population Model which has been used to generate annual estimates of the Island's resident population at every year end for the period 2005-2065, which has informed the assumptions in the Island Plan.

**6.22** For the purposes of estimating demand for homes, the key statistic is not the number of individuals that make up the Island's population, but the number of households - defined as the number of people living together to form a household unit. The average size of a household has been falling in Jersey, as elsewhere, over time, which means that even a stable or declining population can experience household growth generating a demand for more housing units. The factors which, it is believed, have contributed to this phenomenon include a decline in the rate of marriage and an increase in levels of divorce, separation and co-habitation, improved living standards and higher housing aspirations, (which have manifested in an increase in people who can afford to set up their own home rather than remain with family or share with friends), and an increase in life expectancy. It is expected that people will continue to live longer and that more people will live on their own.

**6.23** On the basis of these factors of population change, and allowing for a modest decline in the rate of falling household size, estimates of the increasing number of households can be made and related to population projections. Assumptions have been based on the premise that each additional household represents an increase in demand for one home.

**6.24** A combination of population modelling, using the 2011 Census figures and average household size modelling, has been used to estimate housing requirements for Jersey for the remainder of the Plan period [(3)]This base data generates estimations of housing requirements of 1,000 homes between 2013 - 2015 and 1,300 homes for the period 2016 - 2020. This gives a total requirement, **generated by population change** of 2,300 homes during reminder of the Plan period to 2020.

**6.25** Table 6.1 shows the sources of this increase in the number of households, broken down into two remaining periods of the Plan.

This figure has been amended from 1,450 to 1,300 to relate to the remaining planning period upon which this data is based (2012-2020 ie.8 years).

3 Future Requirement for Homes 2005-2035 (November 2007), Future Requirement for Homes 2005-2035: addendum 2 (March 2009) and Interim Review Residential Land Availability (February 2010);

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Text amended from '10 years' to '8 years'.

Previously 900

| | Period 1 2013-2015 | Period 2 2016-2020 | Total change over 8 years |
|---|---|---|---|
| Reduced household size[4] | 600 | 600 | 1,200 |
| Net inward migration | 450 | 750 | 1,200 |
| Households to communals | -50 | -50 | -100 |
| **Total** | **1,000** | **1,300** | **2,300** |

Previously 1,350

Table 6.1 Housing requirements estimated from population modelling (Source: States Statistics Unit)

Previously 1,450

Previously 2,450

### Housing aspirations

**6.26** In addition to the 'bare' statistical analysis and assumptions about population change and changes in household size, there is a need to consider other factors, such as people's housing aspirations and their ability to realise them, when considering housing requirements.

**6.27** The 2012 Housing Needs Survey[5] is the latest in a series of surveys aimed at establishing potential housing requirements based upon people's expressed aspirations. [6].

### Affordability

**6.28** Since the approval of the 2011 Island Plan a further round of housing needs assessment has been undertaken: the results of the 2012 Housing Needs Survey showed that there was a potential net shortfall of more than 400 dwelling units of social rented housing for the upcoming three-year period 2013-2015. This net shortfall was driven by a need for 2-bedroom dwelling units.

**6.29** The magnitude of this potential shortfall was in close agreement with that implied by the latest (early 2013) Housing Department waiting list for social housing derived from the department's Affordable Housing Gateway.

4 The component of the increase shown as "reduced household size" in Table 6.1 primarily arises from the disaggregation of existing households, i.e. it constitutes a concealed or "latent" component of future demand.

5 Jersey's Housing Assessment 2013-2015 (Nov 2012) Statistics Unit

6 This data will be updated through an update of the Housing Needs Survey to be undertaken in 2014 and information derived from the Housing Gateway, managed by the Housing Department.

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**6.30** Previous rounds of the Housing Needs Survey (2000-2008) had recorded potential net surpluses of social housing, suggesting that the demand for social rented housing has increased in recent years. This latest demand includes that from key workers, defined as 'licensed' employees working in the public sector and in private sector education and health services.

**6.31** The 2012 Housing Needs Survey also indicated a potential net shortfall of approximately 100 owner-occupier 1-bedroom dwelling units after application of affordability criteria based on household income and property prices.

**6.32** Combining the shortfalls in social housing and owner-occupier accommodation generates an estimated net shortfall of some 500 units of affordable 1- and 2-bedroom accommodation across these tenure categories for the period 2013-2015.

**6.33** Whilst there is no definitive estimation of demand beyond 2015, it is considered reasonable to assume a similar level of demand of at least 500 affordable homes for the second half of the Plan period at this time, as originally identified in the 2011 Island Plan. The States Statistics Office has further suggested that the change in housing qualification period will potentially increase demand for affordable homes between 2016-2020 yet further, placing more pressure on the demand for affordable housing. More definitive data will be provided by further rounds of the Housing Needs Survey from 2014 onwards.

### Impact of economic climate

**6.34** The overall demand for dwelling units, driven by reduced average household size and net inward migration, is expected to be largely unaffected by the prevailing economic climate. This premise is supported by the results of the four rounds of the Housing Needs Survey which have been undertaken (in 2000, 2005, 2007 and 2012) at substantially different points in the Island's economic cycle with little observable impact on overall demand. The tenure of demand is, however, more susceptible to the economic climate.

**6.35** The Jersey economy continues to be affected by global economic downturn. As a consequence, higher unemployment, a reduction in finance employment, reduced job security, weak earnings growth, reduced availability of credit and lower inward migration have an effect on the demand for different types of homes: as stated above, the demand for social rented homes has increased in recent years.

### Total demand

**6.36** On the basis of population modelling and housing aspiration, moderated by considerations of realistic affordability, it is estimated that 3,300 homes are required over the remaining Plan period 2013 to 2020 (an average requirement of 412 dwellings per year), of which 1,000 should be affordable housing (an average requirement of 125 dwellings per year).

Previously 430
dwellings per year

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Previously 1,450

Previously 2,450

| Demand Element | Dwellings Required | | Total |
|---|---|---|---|
| | 2013-2015 | 2016-2020 | (2013-2020) |
| **Estimated additional dwelling requirements** | 1,000 | 1,300 | 2,300 |
| **Affordable Housing Requirement** (based upon 2012 Housing Needs Survey) | 500 | 500 | 1,000 |
| **Total** | **1,500** | **1,800** | **3,300** |

Previously 3,450

Previously 1,950

**Table 6.2 Total demand for housing over the period 2013-2020**

### Future updates

**6.37** The planned 2014 Housing Needs Survey will enable further refinement and updating of the estimate of overall demand and its distribution by dwelling size and tenure. The development of the States of Jersey Affordable Housing Gateway will monitor and assess applicants for social and affordable housing requirements and will also be crucial to understanding the latest housing needs. All these information sources will be used in the monitoring and potential updating of the key housing policies so that this Plan remains flexible and responsive to demand and supply changes over remainder of the Plan period.

## Supply of homes

**6.38** In terms of the supply of homes, the current housing stock comprises approximately 45,000 dwellings, [7]the majority of which are owner occupied. The States is a major provider and manager of housing, owning some 4,500 dwellings for social rental[8].

**6.39** Over the last decade, an average of around 500 dwellings have been added to the housing stock each year, varying from 865 in 2002 to only 200 in 2010 [9]

7 estimate prepared by Statistics Unit on basis of 2011 Census @ 44,698 dwellings. Private dwellings, as measured by the census, are not necessarily separate physical dwellings; in the census separate dwellings were identified where the occupants shared a living space and a cooking area and may not necessarily correspond to a dwelling with a separate entrance. For example, a lodger in a private household was counted as living in a separate dwelling if there was a separate living space and cooking facilities for their own use.
8 States of Jersey Housing Department stock as at January 2013
9 2012 land Availability Report (https://www.gov.je/Government/Pages/StatesReports.aspx?ReportID=826)

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**6.40** The 2011 Island Plan set out a requirement of 4,000 homes during the 10 year Plan period, of which 1,000 were required to be for Category A homes.

**6.41** The 2011 Plan envisaged that during the first five years of the Plan (2011-2015) it would deliver 400 Cat A homes and just over 2,000 Category B homes.

**6.42** The performance of the Plan in meeting these targets, over the short time since its approval, has been monitored in the Residential Land Availability Report at January 2012 together with preliminary work undertaken to prepare the same report at start of 2013. This reveals:

- **148 Cat A homes (net) were completed during 2011-12**
  - In addition, 256 units had planning and/or building permission and 146 were recorded as being under construction at the start of 2013.

- **800 Category B homes (net) were completed in 2011-12**
  - In addition, 1,915 units had planning and/or building permission and 484 were recorded as being under construction at the start of 2013.

**Anticipated supply of homes 2013-20**

**6.43** Over the remaining period of the Island Plan, it is anticipated that homes will be provided from a range of sources including the States, parishes and housing trusts as well as the private sector. The principal source of supply is envisaged as being through private sector 'windfall' residential development which will include conversions, redevelopment and infill development within the Built-up Area boundary throughout the Island in accord with Spatial Strategy and other developments outside of the Built-up Area where policy allows.

**6.44** In addition to this, the Plan sets out a policy framework that seeks to enable the supply of homes - in particular Category A affordable housing - over the Plan period.

1. **Policy H1: Category A affordable housing sites**

   **6.45** It is envisaged that over 500 Category A affordable homes will be delivered over the Plan period on both land owned by the States that it proposes to be redeveloped to provide homes, and also on private land that is specifically zoned for this purpose.

   **States owned sites**

   **6.46** This Plan recognises that States owned land that is deemed to be surplus to requirements can make an enhanced contribution to meeting identified requirements for affordable housing, particularly in

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the short-term. The control which the States of Jersey has over these sites is an advantage in that they can be brought forward for development in response to an immediate need.

**6.47** Two States-owned sites are identified for redevelopment to provide affordable homes in whole or in part. Their redevelopment could also serve as a potential catalyst for the residential regeneration of St Helier (as set out at Objectives BE1 and BE2) and contribute to economic recovery;

- **Former Jersey College for Girls, Rouge Bouillon, St. Helier**
- **Summerland and Ambulance Station, Rouge Bouillon, St. Helier**

**6.48** The following States-owned site may also become available during the Plan period and the redevelopment for affordable homes (in whole or in part) could contribute additional supply. Potential yield from this site has not been included in estimations of supply at this stage as it's status is not definitive.

- **La Motte Street Youth Centre, St. Helier**
- **Normans Timber Yard, St. Helier**

### Private rezoned land

**6.49** The rezoning of private land to deliver affordable homes was explicitly excluded from the original 2011 Island Plan with reliance placed instead on a delivery mechanism which sought the delivery of affordable homes as a proportion of private residential development (Policy H3). For a variety of reasons (as set out in the Affordable Housing section) this policy mechanism is now set aside and there is a need for those affordable homes, which would have been delivered by Policy H3, to be sourced differently. It is on this basis that it is proposed to zone a number of sites in private ownership to deliver affordable homes.

**6.50** The sites defined for this purpose have been previously considered as part of the 2011 Island Plan Review and featured in either the draft Island Plan (Sept 2009) and/or at the draft Island Plan Examination in Public, where they were all reviewed by independent planning inspectors.

**6.51** There are four sites proposed for the delivery of Category A affordable housing, and it is envisaged that these will deliver over 290 homes on a total of approximately 18 acres (42 vergées) of land;

- **De La Mare Nurseries, La Rue a Don, Grouville (3 acres/7 vergées)**
- **Samares Nursery, La Grande Route de St Clement, St Clement, (10 acres/22 vergées);**
- **Le Quesne Nurseries, La Rue de Jambart ,St. Clement (4 acres/9 vergées)**
- **Longueville Nurseries, New York Lane, St Saviour (1 acre/2 vergées);**

**6.52** Draft site assessments are set out at appendix B.

2. **Re-develop existing States-owned housing land**

**6.53** In the 2011 Island Plan it was envisaged that the regeneration of outworn States of Jersey Housing Department estates might result in a net loss of homes (c.-300). It is now estimated that during the Plan period there is likely to be an increase in the total number of housing units delivered by the planned re-development and upgrading of these housing estates. This could result in the development of a net increase of 400 homes over the Plan period. No planning policy intervention is required to rezone these sites as they are already in use for the provision of affordable homes.

**6.54** In accord with the principles of making best use of scarce resources, however, the potential to increase the stock of affordable homes by redeveloping them at optimum densities will be required in accord with Policy GD 3 'Density of development'.

**6.55** The sites identified as likely to come forward by **2015** include:

- **Le Squez, St Clement - Phase 2c, 3 & 4 - (56 units)**
- **2-4 Journeaux Street, St. Helier - (9 units)**
- **Le Coin, St Helier - (23 units)**
- **Belle Vue, St Brelade - Phase 1 (35 Units)**

**6.56** The sites identified as likely to come forward by **2020** are:

- **Belle Vue, St Brelade - Phase 2 (47 units)**
- **Ann Court, St Helier - (circa. 190 units)**
- **La Collette Low Rise, St Helier - Phase 1 & 2 - (circa. 100 units)**

An additional 50 units is estimated to be delivered from this site - based upon more recent detailed site analysis by the States of Jersey Property Holdings Department. All subsequent tables (6.3 & 6.4) and text references have been updated.

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## 3. Policy H2: Other Category A sites

**6.57** Only one site from the 11 Category A housing sites designated under Policy H2 of the 2002 Island Plan, does not presently have planning permission. This site is expected to be developed for Category A homes before 2015 (see other category a housing sites).

- **Field 873, Bel Royal St Lawrence** (12 units)

**6.58** In July 2008 the States approved an amendment to the 2002 Island Plan [(10)] to enable the provision of land for housing on eight new sites, involving an area of land of approximately 58.5 vergées. Three of these sites rezoned for housing in 2008 are under construction and they will deliver 155 category A homes before 2015 and contribute to the supply of Category A affordable homes during the remainder of the Plan period;

- **Field 516, 517 & 518, St Saviour (80 Units)**
- **Field 148, Grouville (20 units)**
- **Field 578, Trinity (39 units)**

**6.59** The remaining site has planning permission but development has yet to commence.

- **Field 274, La Lourderie, St Clement** (16 units)

## 4. Policy H5 - Rural centre housing

**6.60** The spatial strategy in this Plan identifies the potential need to protect and support the viability and vitality of Jersey's parishes. To this end, the Plan acknowledges that there may be a justifiable need for some limited, small-scale residential development on greenfield land in or well-related to existing rural centres.

**6.61** Three sites have been identified for rezoning under Policy H5: Housing in Rural Centres to support this objective and it is estimated that the development of these sites, over the remainder of the Plan period, could provide a total of up to 70 units;

10 P75/2008 Island Plan (2002) Amendment: provision of land for lifelong dwellings (for people over 55) and first-time buyers, 16 July 2008

**6.62** Further sites may also come forward over the life time of the Plan, which are not estimated in this source of supply, and Policy H5 provides the mechanism to achieve such development. Any proposal for the rezoning of land outside the existing defined Built-up Area boundary, contained within a Village Plan, would require the approval of the States as a draft revision of the Island Plan[11]

5. **Windfall developments in town of St Helier**

**6.63** St. Helier has traditionally been the principal source of supply for new homes accounting for around half of all developments between 2002-2010.

**6.64** A study of the capacity of the town[12] demonstrates that it has the maximum potential capacity to deliver between 2,000-3,600 additional housing units. The potential maximum yield of 3,600 homes has been discounted to what are believed to be realistic levels of yield providing a total capacity and potential supply of 1,500 homes[13]

**6.65** Since the approval of the 2011 Island Plan, approximately 400 units have been delivered (2011-12) from windfall developments in the town of St. Helier, however the remaining supply is still based upon the average of 150 units per year, leaving an expected supply of 1200 units up to the end of the Plan period.

6. **Windfall developments outside of town**

**6.66** It is estimated that approximately 1,500 'category B' dwellings will come forward on other 'windfall sites' outside of the town, which cannot be individually predicted at this stage. This windfall source includes dwellings on sites within the Built-up Areas, in addition to conversions and small developments in the countryside. The projections are based on past trends, discounted to account for a decline in the availability of infill plots within settlement boundaries. Between 2002 and 2012 such developments accounted for an average of 250 homes/annum. A reduced figure of 150 per annum is used to estimate future windfalls because it is considered the opportunities for re-development within the Built up Area will diminish over time.

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11 Article 4 of the law states that the designation of land for particular development or use should be set out in the Island Plan and Article 3 of the law sets out exacting procedures for public engagement for an Island Plan or a revision of it.

12 Town Capacity Study (October 2007) Planning and Building Services, Planning and Environment Department

13 A development yield of 40% of sites has been assumed at an appropriate density relative to each site, providing a total capacity and potential supply of 1,500 'category B' homes.

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**6.67** Since the approval of the 2011 Island Plan, approximately 400 units have been delivered (2011-12) from windfall developments outside of town, however the remaining supply is still based upon the average of 150 units per year, leaving an expected supply of 1200 units up to the end of the Plan period.

**6.68** It is considered that provision for non-qualified dwellings (lodgings, staff accommodation or registered lodging homes) will be provided by development or redevelopment, predominantly within the Built-up Area (in accord with housing development within the built up area; registered lodging accommodation; and staff and key agricultural worker accommodation.

**6.69** On the basis of the above, the provision made in the Island Plan for the supply of new homes is set out in the following table.

Previously 150 - All Subsequent totals updated

| Supply | | Delivery Period | | | | Total |
|---|---|---|---|---|---|---|
| | | 2013-2015 | | 2016-2020 | | |
| | | Category A | Category B | Category A | Category B | |
| Policy H1 - Category A Housing sites | States owned | 40 | 150 | 200 | 0 | 390 |
| | Rezoned | 0 | 0 | 290 | 0 | 290 |
| Re-develop existing States owned housing sites | | 125 | 0 | 275 | 0 | 400 |
| Policy H2 - Other Category A housing sites | | 170 | 0 | 0 | 0 | 170 |
| Policy H5 Rural Centres (Housing in Rural Centres) | | 20 | 0 | 50 | 0 | 70 |
| Windfall developments from town of St Helier | | 0 | 450 | 0 | 750 | 1200 |
| Windfall developments outside of town of St Helier | | 0 | 450 | 0 | 750 | 1200 |
| **Total** | | **355** | **1,050** | **815** | **1,500** | **3,720** |

**Table 6.3 Supply of homes 2013-20**

Previously 3,670

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## Provision of homes

**6.70** The aim of the Island Plan is to make provision for sufficient land and opportunities to meet, as far as possible, the anticipated requirements for homes over the Plan period.

**6.71** On the basis of an assessment of estimated demand against anticipated and planned supply, it is considered possible to balance identified requirements for new homes over the Plan period with sufficient supply from existing sources (e.g. existing planning permissions, opportunities for development at the Waterfront and windfall developments in the Built-up Area) and from planned sources of supply, including new Category A affordable housing sites, within the Island Plan's overarching strategic policy framework and specifically its Spatial Strategy, which seeks to focus development largely on already-developed land.

**6.72** The net housing supply over the Plan period is summarised in table Net Housing Supply 2013-20.

Table amended following both demand and supply updates

Previously 765

Previously 1,450

| Housing Category | Period | | | | | | Total 2013-2020 | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2013-15 | | | 2016-2020 | | | | | |
| | Total Demand | Total Supply | Net | Total Demand | Total Supply | Net | Total Demand | Total Supply | Net |
| Category A | 500 | 355 | -145 | 500 | 815 | +315 | 1,000 | 1,170 | +170 |
| Category B | 1,000 | 1,050 | +50 | 1300 | 1500 | +200 | 2,300 | 2,550 | +250 |
| Totals | 1,500 | 1,405 | -95 | +1,800 | +2,315 | +515 | 3,300 | 3,720 | +420 |

**Table 6.4 Net Housing Supply 2013-20**

Totals and net figures all adjusted

**6.73** Provision has been made for as many as 3,720 homes over the remainder of the Plan period. In overall terms, this would suggest that the strategy of the Plan, relative to housing land availability, is reasonably healthy, with a small predicted surplus of 420 units over the Plan period.

**6.74** The average build rates required to meet the demand for housing over the remainder of the Plan period is about 412 dwellings per annum which is less than the average rate of residential development delivered since 2002 (2002-2012) of over 500 dwellings per annum.

Previously 430

**6.75** It is considered that the level of anticipated provision over and above the level of estimated demand is prudent, reasonable and justifiable given the estimates and assumptions upon which the forecasts are made in addition to the challenges

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Previously +265 (based upon Ann court increasing by 50 units).

that remain to ensure delivery of the homes required, some of which are set out below. Moreover, the potential surplus (of +315 units) of Category A affordable homes in the latter half of the plan, is considered to be justifiable and prudent having regard to the potential for increasing demand for affordable housing as currently non-qualified households moving into the qualified sector in the next 3-5 years, indicated in the 2012 Housing Needs Survey and to offset an anticipated shortfall in the period 2013-15.

### Release of land for development

**6.76** It needs to be acknowledged that the Island Plan's Spatial Strategy, which seeks to concentrate new development over the Plan period in the Island's Built-up Area, and particularly St Helier, is dependent upon the release of land and the realisation of development opportunities in the Island's urban areas. A number of assumptions, based on evidence and trends, have been made about the potential for land to be developed for housing, but the Plan can only encourage the release of these sites through a policy framework which supports their use for the provision of new homes: the Plan cannot require sites to be released and the current economic circumstances may militate against the release of land for development.

**6.77** To ensure that Category A affordable homes are delivered, the Plan makes provision, at policies H1, H2 and H5, for those sites specifically zoned for this purpose to be compulsorily acquired by the States of Jersey to enable the delivery of homes, should they fail to be brought forward for development during the Plan period.

**6.78** To give effect to a policy of compulsory purchase, separate decisions of the States of Jersey would be required in accord with the procedure established by law [14].

### Density of development

**6.79** There is also a need to ensure that land is developed at more efficient and higher densities of development than have previously been achieved, in accord with Efficient Use of Resources and Density of Development.

**6.80** Whilst the principle of providing a higher density of development is easily accepted, the reality of delivering higher-densities of development 'on the ground' can be more challenging, where there is a need to ensure that new development respects the existing character of the area. Perhaps more significantly, local residents and neighbours are often resistant to higher density development on the basis that this will lead to a greater quantum of development, with associated perceptions of a more significant impact of new development on local and private amenity; more and bigger buildings; and increased traffic generation, to the fore of issues raised against the approval of more efficient development schemes.

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14 Compulsory Purchase of Land (Procedure)(Jersey) Law 1961

# Housing



6.81 Whilst these are all issues that can be addressed through planning and design, the reality of realising higher densities of development needs to be acknowledged relative to estimations of housing yield. It is important to recognise, however, that unless higher more land-efficient densities are generally realised on all development sites, in accord with Efficient Use of Resources, it will not be possible to meet all the identified needs for housing without zoning additional housing sites: this would inevitably result in the further loss of greenfield land.

**Delivery of affordable homes**

6.82 The delivery of affordable homes is always the most challenging aspect of meeting housing demand. On the basis of the current and anticipated future needs for affordable housing, as evidenced by the HNS 2012 and the Affordable Housing Gateway, the Island Plan will seek to deliver Category A affordable homes specifically for the purposes of social rent or affordable homes for purchase on land within its ownership and on privately-owned land specifically zoned for this purpose. The tenure of the homes to be provided on these sites will be regulated through the award of planning permission and planning obligation agreements.

6.83 Access to the homes, whether they are managed by the States of Jersey Housing Department or other providers of social housing such as housing associations and the parishes, will be managed by the States of Jersey Affordable Housing Gateway. This will ensure that they are occupied by households whose needs cannot be met by the open housing market.

6.84 Clearly, ultimate control over access to homes can be best achieved through ownership of the land and will not be an issue on States-owned land. There remains the option for Jersey Property Holdings on behalf of the Housing Department, or for other social home providers, to seek to enter into discussions with the landowners to secure options on any other land zoned for the provision of affordable homes.

6.85 On the basis of these considerations, the Minister for Planning and Environment considers it prudent to ensure that the level of anticipated housing supply is sufficient, even to the extent where a small surplus of supply might be secured in the latter half of the Plan period.

## Proposal 1

**Provision of homes**

The Minister for Planning and Environment will make provision for sufficient land and opportunities to meet the requirements for homes over the Plan period.

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# Housing

Previously 3,670

The Plan makes provision for 3,720 homes to be built over the Plan period, comprising:

Previously 1,120

1,170 Category A homes;

2,550 Category B homes.

### Longer term perspective

**6.86** The requirements beyond the current Plan period, as identified in the Imagine Jersey 2035 reports, and further research and remodelling of the population model carried out by the statistics office, indicates that additional dwellings will be required up to 2035. This will need to be carefully monitored in order to properly plan for the longer-term should the current sources of supply be insufficient, which might involve the further release of greenfield land or relocating St Helier's commercial port which would create further urban development opportunities.

**6.87** It is also critically important to recognise that the underlying basis for medium and long term housing forecasts, and hence the role of the planning system in housing delivery over these time-scales, will not have been radically changed by the current economic circumstances as a result of the 'credit crunch'. It is considered that a fall in short-term housing demand does not justify a consequent reduction in the forward land supply for housing – delivered through zoning of land and windfall opportunities. The supply of land to meet underlying need suggests that the medium to long-term targets should not change.

### Monitoring

**6.88** It is vital that annual monitoring of the housing situation is developed and undertaken to assess the performance of the Plan relative to estimates, assumptions and stated objectives in order that the Plan might be able to respond flexibly in response to changing circumstances and new evidence, particularly with regard to the provision of housing.

**6.89** The Minister for Planning and Environment will prepare and publish a Residential Land Availability Report which will assess whether the targets for housing completions from all sources are being met. Each Residential Land Availability Report will include an update of housing performance, setting out the number of homes actually completed and providing an estimate of the rate at which anticipated housing completions will come forward in the future.

**6.90** The Residential Land Availability Report will inform future reviews of planning policy or strategy related to the demand for and supply of housing, based on the need to maintain a five-year supply of housing land.