



# Cabinet Office

*Oik Coonceil ny Shirveishee*

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## **Residential Land Availability Study (Update 16)**

**Planning Approvals and Land Monitoring 2001-2023**

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## **1.0 Introduction**

1.1 The Residential Land Availability Study (RLAS) is made up of an original Study (2007) and a series of Update Reports. The aim of the Study is to provide information regarding the number and take-up rate of planning approvals for residential dwellings throughout the Island, in addition to identifying land which is zoned for development but does not yet have Planning Approval.

1.2 The complete list of Residential Land Availability Reports which have been produced so far is as follows:

- Residential Land Availability Study. Published in 2007, this report analysed housing approval and residential land availability data from 01/01/01 to 01/07/06.
- Residential Land Availability Study, Update 1. Published in 2008, this report analysed housing approval and residential land availability data from 01/01/01 to 30/06/07.
- Residential Land Availability Study, Update 2. This report was not published and was used as an internal document only, analysing housing approval and residential land availability data from 01/01/01 to 30/06/08.
- Residential Land Availability, Updated Figures for the South (Interim Report to the Residential Land Availability Studies). Published in 2009, this report analysed the housing approval data for the South of the Island from 01/01/01 to 30/06/09.
- Residential Land Availability Study, Update 3. Published in 2010, this report analysed housing approval and residential land availability data from 01/01/01 to 30/06/09.
- Residential Land Availability Study, Update 4. Published in 2012, this report analysed housing approval and residential land availability data from 01/01/01 to 30/06/11.
- Residential land Availability Study, Update 5. Published in 2013, this report analysed housing approval and residential land availability data from 01/01/01 to 30/06/12.
- Residential Land Availability Study, Update 6. Published in 2013, this report analysed housing approval and residential land availability data from 01/01/01 to 30/06/13.

- Residential Land Availability Study, Update 7: Planning Approvals and Land Monitoring (2001-2014). This Report analysed housing approval and residential land availability data between 01/01/01 to 30/06/14.
- Residential Land Availability Study, Update 8: Planning Approvals and Land Monitoring (2001-2015). This Report analysed housing approval and residential land availability data between 01/01/01 to 30/06/15.
- Residential Land Availability Study, Update 9: Planning Approvals and Land Monitoring (2001-2016). This Report analysed housing approval and residential land availability data between 01/01/01 to 30/06/16.
- Residential Land Availability Study, Update 10: Planning Approvals and Land Monitoring (2001-2017). This Report analysed housing approval and residential land availability data between 01/01/01 to 30/06/17 and from approval data separately between 01/07/11 and 30/06/17.
- Residential Land Availability Study, Update 11: Planning Approvals and Land Monitoring (2001-2018). This Report analyses housing approval and residential land availability data between 01/01/01 to 30/06/18 and from approval data separately between 01/07/11 and 30/06/18. Published June 2019.
- Residential Land Availability Study, Update 12: Planning Approvals and Land Monitoring (2001-2019). Unpublished.
- Residential Land Availability Study, Update 13: Planning Approvals and Land Monitoring (2001-2020). This latest Report analyses housing approval and residential land availability data between 01/01/01 to 30/06/20 and from approval data separately between 01/07/11 and 30/06/20.
- Residential Land Availability Study, Update 14: Planning Approvals and Land Monitoring (2001-2021). This latest Report analyses housing approval and residential land availability data between 01/01/01 to 30/06/21 and from approval data separately between 01/07/11 and 30/06/21.
- Residential Land Availability Study, Update 15: Planning Approvals and Land Monitoring (2001-2022). This latest Report analyses housing approval and residential land availability data between 01/01/01 to 30/06/22 and from approval data separately between 01/07/11 and 30/06/22.

### Latest Publication

- Residential Land Availability Study, Update 16: Planning Approvals and Land Monitoring (2001-2022). This interim update analyses housing approval and residential land availability data between 01/01/01 to 30/06/23 and from approval data separately between 01/07/11 and 30/06/23.

1.3 The data for this report was sourced from the planning approval statistics on the planning application database. The following applications are not included in the figures:

- Approvals which became 'final' after 30<sup>th</sup> June 2023. Therefore, applications which were subject to an Appeal decision on or after that date have not been included.
- In previous updated approvals for individual replacement dwellings (i.e. where 1 dwelling is proposed to be replaced with another) were not included.
- Approval in Principle applications, where there was no indication of how many dwellings would or could be possible on a site.
- Approvals for the change of use to/from tourism, from/to residential for individual dwellings, where it was judged that there would be difficulties in monitoring the take-up of such proposals (this included applications which proposed the additional use of dwellings for tourism).

1.4 Re-examining the older data set for errors and/or natural changes is an important part of the analysis. Errors can be caused by the data not being extracted from the raw data base during the relevant study period, or from a site being counted twice under different approvals. With natural changes, the majority of these occurred because an approval had not been taken up within the relevant timescale and had therefore lapsed. However, other natural changes arose because some applications were simply found to have not been taken up, usually because a different approval had been implemented on the same site, but also because a building to be converted may have subsequently been demolished, thereby invalidating an approval.

1.5 The housing approval figures are **net** totals. Any deductions of existing residential units (such as through conversions or demolitions) have already been removed from the total figures. This can be seen in the detailed residential approval data presented in Table Sets 12 to 15.



## 2.0 Residential Approval Data '2001 to 2023' & '2011 to 2023'

### 2.1 Approval data for new residential properties<sup>1</sup>

2.1.1 Housing Policy 3 of the Isle of Man Strategic Plan 2007 sets out the housing needs for the Island and each of the four Areas. The Strategic Plan 2007 covered the plan period 2001 to 2016. The Strategic Plan 2016 covers the Plan period 2011 to 2026. The distribution of these figures is as follows:

<b>Strategic Plan 2007</b>		<b>Strategic Plan 2016</b>
<b>Area</b>	<b>Number</b>	<b>Updated</b>
North	1,200	770
South	1,300	1,120
East	2,500	2,440
West	1,000	770
<b>All Island</b>	<b>6,000</b>	<b>5,100</b>

2.1.2 The net approvals are as follows (see Table Set 1 – Island):

<b>Area</b>	<b>Strategic Plan 2007 Data set 2001 to 2023</b>	<b>Strategic Plan 2016 Data set 2011 to 2023</b>
North	1,203	605
South	1,727	979
East	3,019	831
West	1,444	522
<b>All Island</b>	<b>7,393</b>	<b>2,937</b>

### 2.2 Take-up rates of approvals (2001-2023)

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<sup>1</sup> The Isle of Man Strategic Plan 2007 now been revoked. The Isle of Man Strategic Plan 2016 was approved by Tynwald on the 15<sup>th</sup> March 2016. Monitoring approvals and take-up from 2001 remains important however.

2.2.1 The monitoring of the housing approval figures since the initial report was produced has highlighted that not all of the approved units will actually be built. This is called the take-up rate. Although the actual housing approval data is taken to be an indication of where the figures are in relation to the overall figures as set out in the Strategic Plan, it is important to note that the take-up rate of approvals is less than 100% in all four Areas. Therefore, the approval data alone cannot be taken to be the final indication of how many units are built and it is important to continue assessing the take-up rate of applications, in order to ensure that needs are being met.

2.2.2 When checking take-up rates, applications are cross-referenced with data from the Department of Environment, Food and Agriculture's (DEFA's) Planning & Building Control Division. DEFA's Building Control Section administers the Island's Building Control legislation, with the current exceptions of Douglas and Onchan. Therefore, until such time as there is an Island-wide system for Building Control data, there will be a reliance on other sources of information for analysing take-up rates in Douglas and Onchan, such as officer knowledge, site visits and aerial photography.

2.2.3 The take-up rates of the total net approvals (7,393) are as follows (see Table Set 16 - Island, Page 1):

<b>Area</b>	<b>Total valid approvals 2001 – 2023</b>	<b>Units complete or under construction</b>	<b>Percentage</b>
North	1,203	979	81%
South	1,727	1,566	91%
East	3,019	2,741	91%
West	1,444	1,374	95%
<b>All Island</b>	<b>7,393</b>	<b>6,660</b>	<b>90%</b>

2.2.4 The take-up rate of the total net approvals is highest in the West at 95% and lowest in the North at 81%. The average for the Island is 90%.

2.2.5 Another way to look at the take-up rates is to also include the data for approvals which have not been taken up, or which have lapsed (these approvals have been removed from

the 7,393 total net units as they are no longer valid, but if they are included the total is increased by 1,766 to 9,159). These take-up rates are as follows (see Table Set 16 - Island, Page 2):

<b>Area</b>	<b>Units that could have been developed (incl. lapsed approvals)</b>	<b>Units complete or under construction</b>	<b>Percentage</b>
North	1,706	979	57%
South	2,078	1,566	75%
East	3,774	2,741	73%
West	1,601	1,374	86%
<b>All Island</b>	<b>9,159</b>	<b>6,660</b>	<b>73%</b>

2.2.6 The above calculations reduce the take-up rates in all the areas. This table shows the West having the highest take up rate at 86%. The North has the lowest take-up rate at 57% (979 units) and further investigation into Table Set 16, page 2 shows that there are 1765 units which have lapsed or have not been taken up.

2.2.7 The number of lapsed units in the North (503 or 29%) is only exceeded by the East where 20% (755 units) units have lapsed or not been taken up.

2.2.8 Take-up rates can also be assessed by calculating the number of units which have not been taken up or which have lapsed as a percentage of the 9,159 total units which could have been developed since 2001. The results of this are as follows (see Table Set 16 - Island, page 2):

<b>Area</b>	<b>Units that could have been developed (incl. lapsed approvals)</b>	<b>Number of lapsed applications</b>	<b>Percentage</b>
North	1,706	503	29%
South	2,078	351	17%
East	3,774	755	20%
West	1,601	156	10%
<b>All Island</b>	<b>9,159</b>	<b>1,765</b>	<b>19%</b>

2.2.9 During the latest plan period of 2011-2023 take-up rates can also be assessed by calculating the number of units which have not been taken up or which have lapsed as a percentage of the 3,476 total units which could have been developed since 2011. The results of this are as follows (see Table Set 16 - Island, page 4):

<b>Area</b>	<b>Units that could have been developed (incl. lapsed approvals)</b>	<b>Number of lapsed applications</b>	<b>Percentage</b>
North	728	123	17%
South	1119	141	13%
East	1027	196	19%
West	602	79	13%
<b>All Island</b>	<b>3,476</b>	<b>539</b>	<b>16%</b>

2.2.10 Across the Island since 2011, 16% of approved units have either lapsed or have not been taken up. It is therefore important to monitor the take-up rate of applications, as although housing need may appear to be met on paper, the approved units may not actually be built.

### 2.3 Conversions / windfalls (2011 - 2023) and projections (2023 - 2026)

2.3.1 Since 2011, conversions account for a total of 533 units throughout the Island, representing 15% of approved units since 2011. Of these, 91 units have come from hotel and guest house conversions in Douglas (3.1% of total approved units, or 17% of total conversions).

2.3.2 Windfalls are defined as approvals for new build development on land not designated for residential use, where the total number of units is less than 25 dwellings (excludes individual new dwellings in the open countryside). Since 2011, windfalls account for a total of 108 units throughout the Island, representing 4% of valid approvals.

2.3.3 The approved conversion and windfall figures can be used to calculate the projection figures up to 2026. Due to the number of hotel and guest house conversions in Douglas, this figure was not included in the calculations for making conversion projections. The projection figures were calculated as follows (see Table 10 – Island):

- Conversions:  $442 \div 11.5$  (past years)  $\times 3.5$  (years remaining) = 134
- Windfalls:  $108 \div 11.5$  (past years)  $\times 3.5$  (years remaining) = 33

2.3.4 When the conversion and windfall projections up to 2026 are added to the net approvals between 2011 and 2023, the results change to the following (see Table 1 – Island):

<b>Area</b>	<b>Number</b>
North	642
South	1010
East	917
West	536
<b>All Island</b>	<b>3,105</b>

2.3.5 The combined figures of the net approvals up to 2026, and the conversion and windfall projections up to 2026, increase the totals in each of the Areas. Looking at the situation Island-wide on known and projected data, the housing demands of the Island in terms of development opportunities needed would be 1,995 between 2023 and 2026.

### **3.0 Demolition Statistics**

- 3.1 The Planning & Building Control Directorate of DEFA deals with applications to demolish buildings in all areas of the Island, excluding Douglas and Onchan, which are currently covered by their own local authorities. The Demolition Notices are cross-referenced with planning applications, but any Notices which do not have corresponding planning applications are still subtracted from the housing approval data (Table Sets 12 to 15), so further deductions of residential demolitions are therefore not necessary.
- 3.2 Full details of the residential Demolition Notices issued between 2021 and 2022 are displayed in Table Set 11 - Island. There was one Demolition Notices issued between 2022 and 2023 for the residential units in their entirety. Demolitions consisted almost entirely of part Residential to create further accommodation on site.
- 3.3 Table Set 11 (summary) - Island shows that between 2001 and 2023, a total of 914 residential units were demolished. Large scale public housing redevelopments accounted for 589 (70%) of these, with 276 at Pulrose in Douglas, 157 at the Lezayre Estate in

Ramsey, 125 at Janet's Corner in Castletown, 17 at Marashen Crescent in Port Erin and 14 at Clagh Vane in Ballasalla.

#### **4.0 Residential Land Availability as at June 2021**

4.1 Land which is designated for residential use but with no valid planning approval, is summarised in Table 17 - Island. Further detailed information about the individual sites is shown in Table Sets 18 to 21.

4.2 There is land remaining in all four Areas which is zoned for residential development (including brownfield and Unoccupied urban sites but excluding Strategic Reserves) but does not have planning approval. The amount of designated land without planning approval (DLWPA) varies between the Areas and is as follows:

<b>Area</b>	<b>DLWPA (ha)</b>	<b>Island's Total</b>
North	38.8	24%
South	18.69	12%
East	75.69	48%
West	25.2	16%
<b>All Island</b>	<b>158.38</b>	<b>100%</b>

4.3 The East has the largest amount of DLWPA land at 75.69 hectares, followed by the North at 38.8 hectares and the West at 25.2 hectares. The South has the least amount of available land at 18.69 hectares.

4.4 The 38.8 hectares of DLWPA in the North represents 24% of the total DLWPA in the Island. The largest single land area in the North is 20 hectares of land in Lezayre, immediately to the west of Ramsey. It was previously thought that this site might not come forward for development, so the 20 hectares were not included in the Residential Land Availability figures. However, the site was included for the first time in Update 3 (2001-2009), when it was subject to an Appeal decision for a residential and industrial development (PA 07/02303/A). The application was refused for a single reason relating to traffic impact, so the 20 hectares remained in the Residential Land Availability figures.

More recently a credible application (20/01080/B) was submitted and revised several times to 138 dwellings over 7.25 hectares only but was subsequently rejected. The second largest single land area in the North is 15.9 ha in Jurby (see Table Set 18 – North).

- 4.5 The 18.69 hectares of DLWPA in the South represents 12% of the total DLWPA in the Island. Update 6 (2012-2013) included alterations following the Adoption of the Area Plan for the South which resulted in 37.49 hectares of land being identified for development. This has since reduced by 6.88 hectares at Ballakilley from the approval of PA 14/00549/B for a development of 155 dwellings and the approval for the Ballasalla bypass in Update 13.
- 4.6 The 24.92 hectares DLWPA in the West represents 22% of the total DLWPA in the Island. The land has reduced by 1.98 ha in Patrick since the approval of PA 14/00295/A for the development of 47 dwellings. The majority of the DLWPA in the West is found in Peel, where the largest individual site is 10.9 hectares east of Glenfaba Road (see Table Set 21 – West).
- 4.7 The Approved Area Plan for the East has now removed previously extant residential land in Laxey, Lonan and Santon identified within the RLAS study and several new sites abutting the Douglas conurbation have been identified. This gives a total adjusted figure of land identified within the Area Plan for the East of 48.95 ha or 33% of All Island figure above.

## **5.0 Conclusions**

- 5.1 Between 1<sup>st</sup> January 2001 and 30<sup>th</sup> June 2023, a net total of 7,393 residential units were approved throughout the Island. A total of 1,203 units were approved in the North, 1,727 in the South, 3,019 in the East and 1,444 in the West.
- 5.2 The Island-wide take-up rate of the 7,393 current valid approvals is 90%. The take-up rate is highest in the West at 95%, followed by the East at 90%, the South at 91% and the North at 81%.
- 5.3 Since 2001, in addition to the 7,393 current valid approved units, a further 1,765 have become invalid by not being taken up or lapsing. These 1,765 units mean that 19% of the total approved units since 2001 have not been implemented. This figure is highest in the North at 29%, followed by the East at 20%, then the South at 17% and finally the West at 10%.
- 5.4 As the take-up rate of planning approvals is less than 100% in all four areas, it is important to continue to monitor this figure when calculating whether the housing needs on the ground up to 2026 are being met.
- 5.5 If the projected conversion and windfall figures up to 2026 are included with the net approvals (2011 to 2022), the Island-wide total increases from 2,937 units to 3,105.
- 5.6 There is limited DLWPA that is suitable or available for residential development in the North and West and the figures reflect this. The 82 Development order, Peel Local Plan, Sulby Local Plan and the Ramsey Local Plan all contain large extant designations that are unlikely to be brought forward either partially or in the entirety for a range of reasons, this significant skews the percentages. The East had a chronic undersupply that was recently addressed as part of the Area Plan for the East that came into operation on the 1<sup>st</sup> December 2020. The South having the most up to date Area Plan has few issues in delivering the targets of the Strategic Plan with the exception of Castletown that has seen less development than either Malew (Ballasalla) or Port Erin. As the Area Plan for the South draws to it's 10<sup>th</sup> anniversary the need to review the plan and address this issue will become more pressing. Overall there are 38.8 hectares in the North, 18.69 hectares in the South, 25.2 hectares in the West and 75.69 hectares in the East.