Guernsey Annual Residential Property Stock Bulletin

31st December 2018
Issue date 28th March 2019

The Guernsey Annual Residential Property Stock Bulletin provides a snapshot of Guernsey's domestic property stock at the end of the year and tracks how this has changed over time.

States of Guernsey
Data and Analysis

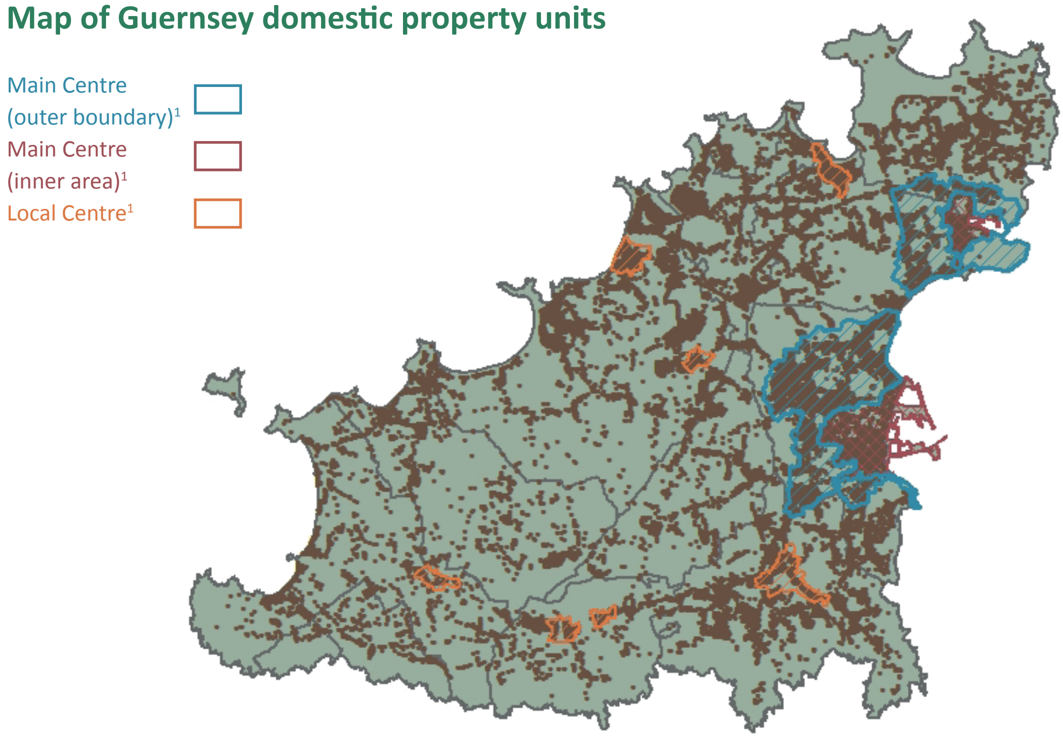
1.1 Introduction

The Guernsey Annual Residential Property Stock Bulletin provides a snapshot of Guernsey's domestic property stock. Data first became available in 2010 and is sourced from several States of Guernsey Departments. This data is brought together in a system which enables statistical and spatial analysis, provided by Digimap Ltd. The data analysis is performed by the Data and Analysis team, which produces this bulletin.

1.2 Headlines

- At the end of December 2018, the total number of domestic property units in the island was 27,232, of which 1,600 (5.9%) were Open Market.
- During 2018, 287 new units were created and 55 units were removed, which is a net increase of 232, a 0.9% increase since December 2017. This is the highest annual increase since 2014. 186 units of the net increase were added to the private market - the largest annual increase in the private market on record. Data first became available in 2010.
- 74.6% of all domestic property units were houses or bungalows and 24.5% were apartments, compared to 75.7% and 23.3% respectively in December 2013.
- Almost a third of all domestic property units (31.7%) had 3 bedrooms.
- 59.4% of the units were owner occupied, 28.4% were privately rented, 8.6% were Affordable social rented units and 0.7% were Affordable intermediate (partially owned) housing units. The remaining 2.8% of units were of other tenure types or vacant.

Figure 1.2.1: Map of Guernsey domestic property units



[1] More information about the "Main Centre" (shown with a blue outline on the maps throughout this bulletin) and the "Local Centres" (shown in orange) is available on page 12 and **www.gov.gg/planningpolicy.**

1.3 Contents

2.1 Domestic property units - total units and summary of annual changes

At the end of December 2018, there were 27,232 domestic property units in Guernsey.

A domestic property unit is defined (for the purposes of this bulletin) as being a building, or part of a building, which has its own postal address, is self-contained and is used for residential purposes (including those which are vacant).

Table 2.1.1 shows the change in the total recorded number of domestic property units since 2013. At the end of 2018, there were 232 (0.9%) more domestic property units than at the end of 2017. This is the largest increase in domestic units since 2014. There was a net change of seven administrative amendments in 2018, compared with a net change of three administrative amendments in 2017 and zero in 2016. An administrative amendment includes, for example, the inclusion of a small domestic property above a commercial unit, the existence of which was not previously known.

Of the 27,232 domestic property units, 94.1% were Local Market and the remaining 5.9% were Open Market units.

The change in the total number of Local and Open Market units over time can be seen in **Table 2.1.2** and **Figures 2.1.1** and **2.1.2**. The number of Local Market domestic property units has increased by 3.4% since 2013.

The number of Open Market domestic property units had been decreasing every year since 2010. **Figure 2.1.2** shows an increase of 1.2% from 2014 to 2015. This is due to an administrative adjustment to the Open Market Part B register to reflect twelve domestic property units, the majority of which are used for staff accommodation, which had previously been misclassified as Local Market domestic property units.

The 0.7% increase in the number of Open Market units during 2018 restores the total number of Open Market dwellings to the amount seen in 2015. A number of inscriptions previously allocated to demolished or deregistered dwellings were used in 2018 to inscribe replacement dwellings.

More information on the change in the number of units is available in **Section 5** on **page 23.**

Table 2.1.1: Total domestic units

Year	Total no. units	Net change	Administrative amendments	Annual % change in total
2013	26,372	171	29	0.8%
2014	26,692	296	24	1.2%
2015	26,861	144	25	0.6%
2016	26,904	43	0	0.2%
2017	26,993	86	3	0.3%
2018	27,232	232	7	0.9%

Table 2.1.2: Units by Market

Year	Total no. Local Market units	% change in total Local Market units	Total no. Open Market units	Annual % change in total Open Market units
2013	24,784	0.8%	1,588	-0.4%
2014	25,108	1.3%	1,584	-0.3%
2015	25,258	0.6%	1,603	1.2%
2016	25,310	0.2%	1,594	-0.6%
2017	25,404	0.4%	1,589	-0.3%
2018	25,632	0.9%	1,600	0.7%

Figure 2.1.1: Total Local Market domestic units

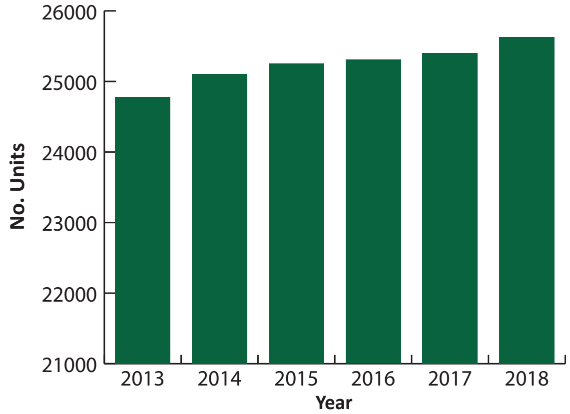
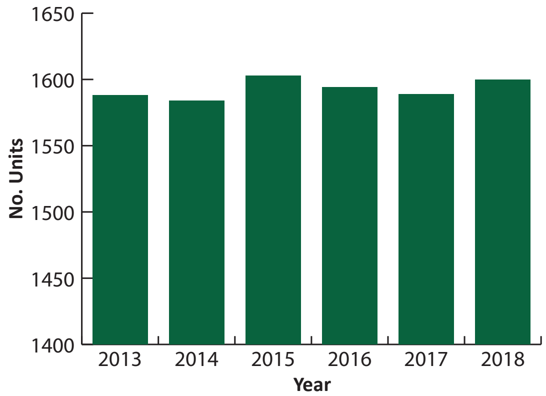


Figure 2.1.2: Total Open Market domestic units



2.2 Domestic property units - market and type

Table 2.2.1: Type of units by Market

Type	2018					
	No. units			% of units		
	Local	Open	Total	Local	Open	Total
Apartment	6,492	173	6,665	25.3	10.8	24.5
Bungalow	9,867	356	10,223	38.5	22.3	37.5
House	9,026	1,054	10,080	35.2	65.9	37.0
Other	247	17	264	1.0	1.1	1.0
Total	25,632	1,600	27,232	100	100	100

Figure 2.2.1: Type of Local Market units

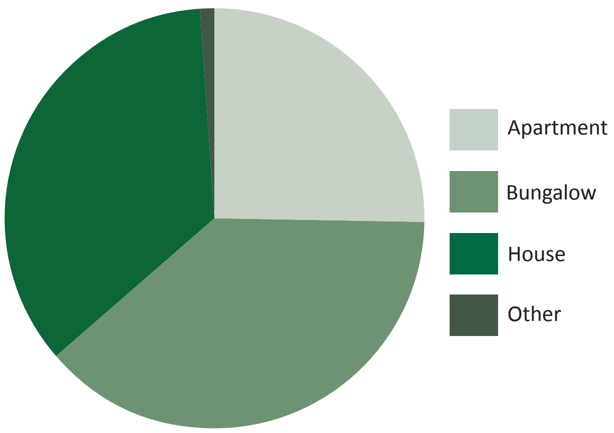
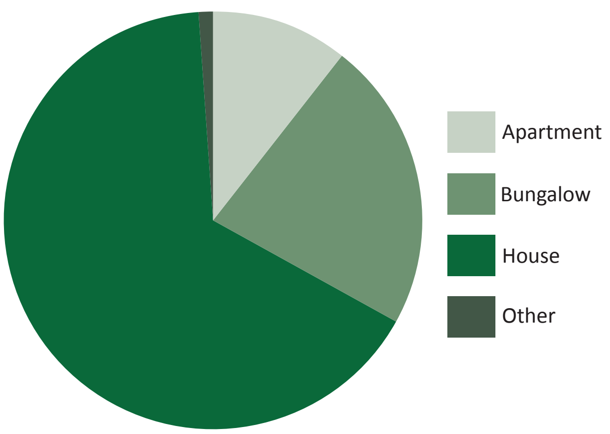


Figure 2.2.2: Type of Open Market units



Domestic property units can be categorised by type; apartment, bungalow, house and other.

Please see **page 30** for more information on the definitions of a “unit” and Open and Local Market categories, as well as more detail on the types of properties included under the headings used in **Table 2.2.1** and throughout this report.

The distribution of property unit types has remained consistent between 2011 and 2018. In 2018, bungalows and houses accounted for the largest proportion of domestic property units (Local and Open Market combined), comprising 37.5% and 37.0% of the total respectively. 24.5% of domestic property units were apartments and the remaining 1.0% were other types of unit (see **Table 2.2.1**).

Figures 2.2.1 and **2.2.2** illustrate the different proportions of unit types which comprise the Open and Local Markets. For example, 35.2% of Local Market domestic property units were houses, compared with 65.9% of Open Market domestic property units.

For information on the number of people living in each Market see **www.gov.gg/population**.

2.3 Domestic property units - bedrooms

Information on the number of bedrooms per domestic property unit was originally sourced from the 2001 Census. Until October 2017, this data was manually updated and maintained using information sourced from property sale adverts, Cadastre and other States sources. Since October 2017 this process has been automated by Cortex, increasing the accuracy of bedroom information collected from Estate Agents' websites. Bedroom data is currently unavailable for 8.7% of the island's domestic property units, compared to 9.2% in 2016.

At the end of December 2018, the highest proportion (31.7%) of domestic property units had three bedrooms (see **Table 2.3.1**). This is true for both Local and Open Market units, for which three bedroom units accounted for 31.9% and 28.3% respectively.

17.1% of Local Market units had one bedroom, compared with 3.8% of Open Market units at the end of December 2018. 19.6% of Open Market units had more than 4 bedrooms, compared with 4.4% of Local Market units.

Figure 2.3.1 shows how the distribution of units by number of bedrooms differs between the Local and Open Market. The majority of Local Market property units have three bedrooms or fewer, whereas the majority of Open Market units have three or more bedrooms.

Table 2.3.2 shows the number of Local Market domestic property units split by the number of bedrooms for the six years ending in 2018. The distribution of units by number of bedrooms in the Local Market has changed very little since 2013. The proportion of units by number of bedrooms has also remained fairly stable in the Open Market since 2013. (See **Table 2.3.3**.)

Table 2.3.1: Number of bedrooms per unit by Market

No. bedrooms	2018					
	No. units			% of units		
	Local	Open	Total	Local	Open	Total
1	4,381	61	4,442	17.1	3.8	16.3
2	6,835	186	7,021	26.7	11.6	25.8
3	8,185	452	8,637	31.9	28.3	31.7
4	2,908	415	3,323	11.3	25.9	12.2
Over 4	1,125	314	1,439	4.4	19.6	5.3
Unknown	2,198	172	2,370	8.6	10.8	8.7
Total	25,632	1,600	27,232	100.0	100.0	100.0

Figure 2.3.1: Proportion of bedrooms per unit by Market

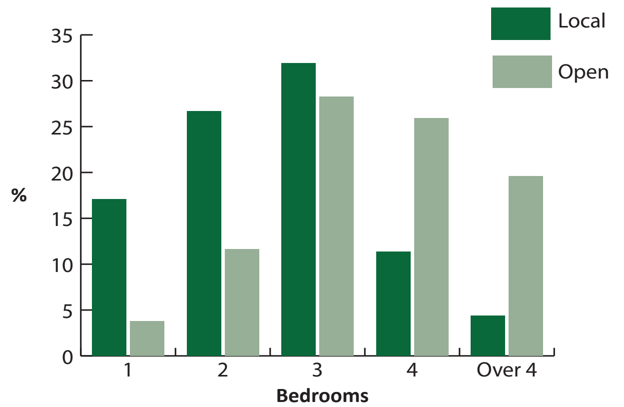


Table 2.3.2: Number of bedrooms per Local Market unit

No. bedrooms	Year					
	2013	2014	2015	2016	2017	2018
1	4,179	4,205	4,302	4,274	4,333	4,381
2	6,645	6,683	6,701	6,723	6,782	6,835
3	8,099	8,102	8,147	8,119	8,159	8,185
4	2,698	2,711	2,776	2,825	2,854	2,908
Over 4	939	956	1,021	1,080	1,095	1,125
Unknown	2,224	2,451	2,311	2,289	2,181	2,198
Total	24,784	25,108	25,258	25,310	25,404	25,632

Table 2.3.3: Number of bedrooms per Open Market unit

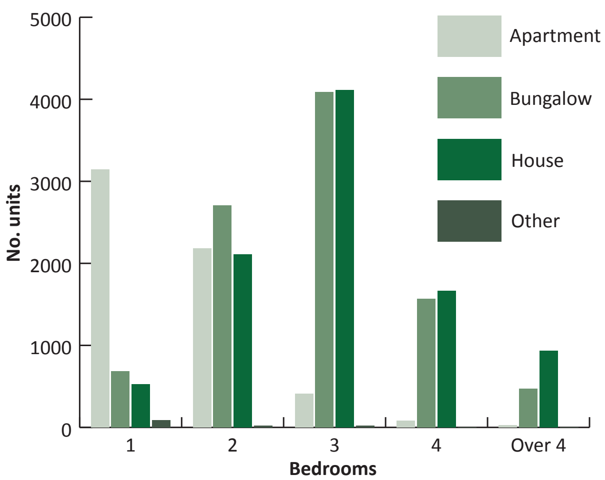
No. bedrooms	Year					
	2013	2014	2015	2016	2017	2018
1	60	59	60	57	61	61
2	182	181	174	173	180	186
3	495	491	475	464	474	452
4	384	384	415	420	406	415
Over 4	270	269	292	304	297	314
Unknown	197	200	187	176	171	172
Total	1,588	1,584	1,603	1,594	1,589	1,600

2.4 Domestic property units - type and bedrooms

Table 2.4.1: Type and number of bedrooms per unit by Market

Type	No. bedrooms	2018			
		Local	Open	Total	% of total units
Apartment	1	3,118	26	3,144	11.5%
	2	2,119	64	2,183	8.0%
	3	380	32	412	1.5%
	4	72	12	84	0.3%
	Over 4	26	4	30	0.1%
	Unknown	777	35	812	3.0%
	Total	6,492	173	6,665	24.5%
Bungalow	1	677	8	685	2.5%
	2	2,655	52	2,707	9.9%
	3	3,946	142	4,088	15.0%
	4	1,474	92	1,566	5.8%
	Over 4	434	40	474	1.7%
	Unknown	681	22	703	2.6%
	Total	9,867	356	10,223	37.5%
House	1	501	26	527	1.9%
	2	2,041	68	2,109	7.7%
	3	3,837	277	4,114	15.1%
	4	1,358	310	1,668	6.1%
	Over 4	663	269	932	3.4%
	Unknown	626	104	730	2.7%
	Total	9,026	1,054	10,080	37.0%
Other	1	85	1	86	0.3%
	2	20	2	22	0.1%
	3	22	1	23	0.1%
	4	4	1	5	0.0%
	Over 4	2	1	3	0.0%
	Unknown	114	11	125	0.5%
	Total	247	17	264	1.0%

Figure 2.4.1: Number of bedrooms distribution by type of unit



Combining the information on unit types and numbers of bedrooms gives a more detailed picture of Guernsey's domestic properties. The data regarding number of bedrooms is updated throughout the year as new information becomes available.

At the end of December 2018, three bedroom bungalows and three bedroom houses made up the largest proportions of the total units (15.0% and 15.1% respectively). See **Table 2.4.1** and **Figure 2.4.1**.

One bedroom apartments and two bedroom bungalows contributed the next largest proportions (accounting for 11.5% and 9.9% of the total respectively).

Two bedroom apartments and houses formed 8.0% and 7.7% of the total respectively.

Please see **page 30** of this report for more information on the property types referred to above.

2.5 Domestic property units - TRP

The number of domestic Tax on Real Property [TRP] units represents a measure of the size (based on square metres of floor area) of a domestic property unit, excluding land. This information is based on Cadastre records and only property units which have their own individual measure of domestic TRP are included. As such, the sample represents 72% of all the island's property units.

The TRP distributions shown in **Table 2.5.1** and **Figure 2.5.1** highlight the differences in the typical sizes of Local and Open Market property units.

At the end of December 2018, the largest proportion of Local Market domestic property units fell into the 101 to 150 TRP units band. By comparison, the modal band for Open Market domestic property units was 251 to 300 TRP units. This has been a stable trend since 2012.

19.7% of Open Market domestic property units had a TRP of over 500 units, compared with 1.1% of the Local Market domestic property units, the same proportions as in 2017. This compares with 19.3% and 1.1% for the Open and Local Market respectively in 2016 and 19.1% and 1.1% respectively in 2015. Open Market property units tend to be, in general, larger than those in the Local Market.

The overall TRP distributions shown here are broken down by property types and number of bedrooms on **pages 9, 14, 17 and 21**.

Table 2.5.1: Domestic TRP distribution by Market

Domestic TRP units	2018		
	% of Local Market units	% of Open Market units	% of total units
50 or less	1.5	0.6	1.4
51 to 100	20.3	0.9	19.0
101 to 150	30.4	2.2	28.5
151 to 200	22.8	9.9	21.9
201 to 250	11.7	13.9	11.9
251 to 300	5.7	16.6	6.5
301 to 350	3.2	12.9	3.8
351 to 400	1.6	8.9	2.1
401 to 450	1.0	7.9	1.5
451 to 500	0.6	6.4	1.0
501 to 550	0.4	3.8	0.7
551 to 600	0.2	2.7	0.4
601 to 650	0.1	2.7	0.3
651 to 700	0.1	2.4	0.3
701 to 750	0.1	1.9	0.2
751 to 800	<0.1	1.8	0.2
801 to 850	0.0	0.9	0.1
851 to 900	0.0	0.8	0.1
901 to 950	0.0	0.9	0.1
951 to 1000	0.0	0.2	0.0
Over 1000	0.0	1.7	0.1
Total	100.0	100.0	100.0

NB: Categories may not sum to overall total due to rounding

Figure 2.5.1: Domestic TRP distribution by Market

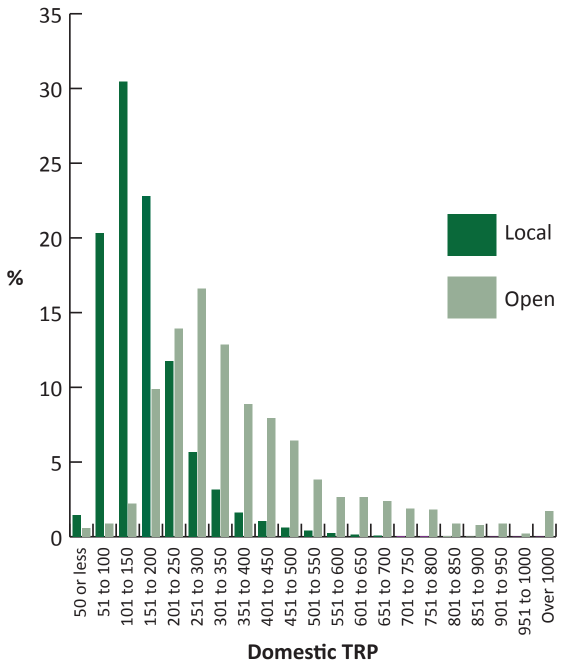


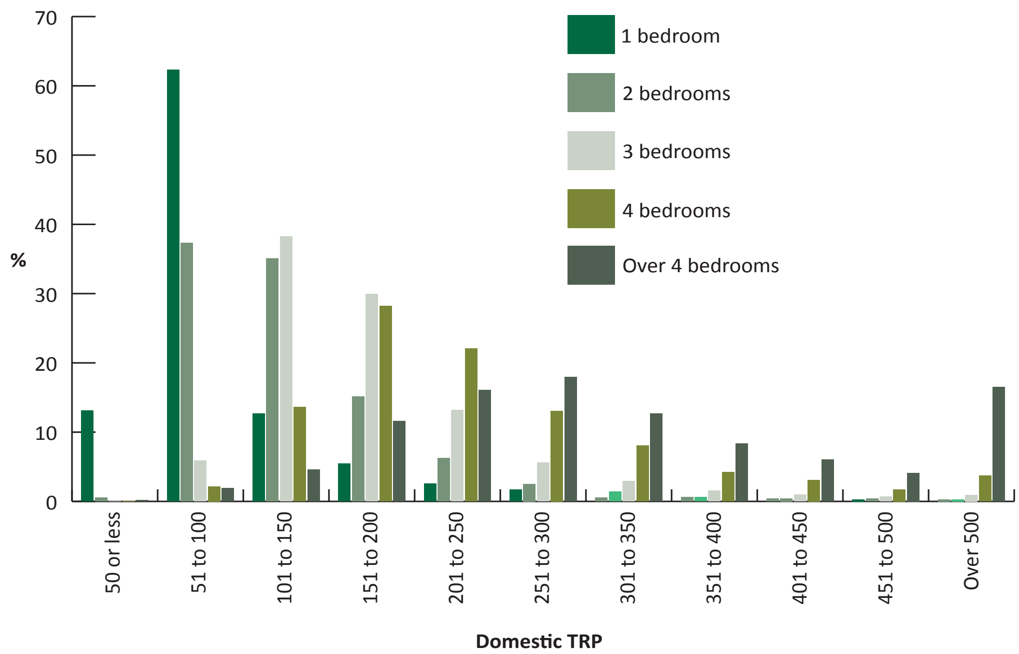
Table 2.6.1: Domestic TRP distribution by number of bedrooms

Year	Overall median TRP for all domestic property units
2013	154
2014	154
2015	154
2016	154
2017	154
2018	154

Table 2.6.2: Domestic TRP of units by type and number of bedrooms

Type	No. bedrooms	2018
		Median TRP
Apartment	1	65
	2	86
	3	124
	4	145
	Over 4	86
Bungalow	1	103
	2	135
	3	163
	4	200
	Over 4	250
House	1	110
	2	116
	3	155
	4	230
	Over 4	336
Overall median for all domestic property units		154

Figure 2.6.1: Domestic TRP distribution by number of bedrooms



As previously noted, the number of domestic TRP units represents a measure of the size (based on square metres of floor area) of a domestic property unit, excluding land.

The overall median number of TRP units per property unit was 154 at the end of December 2018. As shown in **Table 2.6.1**, the overall median has remained stable, at 154 every year since 2013.

As expected, the number of TRP units generally increases as the number of bedrooms increases and tends to be higher for houses than bungalows and lowest for apartments. This is shown in **Table 2.6.2**.

Figure 2.6.1 shows the distribution of TRP values for domestic property units split by number of bedrooms. Over half of the one bedroom units (62.3%) are concentrated within the 51 to 100 TRP units band. The distribution of units with more than one bedroom, however, is broader. The largest concentration of TRP units for properties with over four bedrooms is within the 251-300 TRP units band (17.9%).

2.7 Domestic property units - tenure

The tenure of domestic property units (shown in Table 2.7.1) can be ascertained from Cadastre ownership information. The Affordable category is divided into "Social" (social rented) and "Intermediate" (partially owned) units. Please see page 31 for more information.

At the end of 2018, 16,189 (59.4%) of the domestic property units in Guernsey were owner occupied (0.4 percentage points lower than at the end of 2017). There were 7,724 (28.4%) privately rented domestic units (0.2 percentage points higher than at the end of 2017). Affordable social units accounted for 8.6% of all domestic property units and Affordable intermediate properties made up 0.7% of units. Prior to 2017, these categories were combined in this Bulletin. The remaining 773 units (2.8%) had other tenure types including staff accommodation and self-catering units as well as properties that are known to be vacant. More information on vacant units is provided on page 27. Please see pages 28-29 for information regarding specialised housing that includes care provision.

Of the 27,232 domestic property units, 1.4% (392) were specifically for people over the age of 55.

The proportions by tenure differ between the Local and Open Market. The proportion of Local Market owner occupied domestic property units has decreased by 0.4 percentage points between 2017 and 2018. During this time, the proportion of privately rented units increased by 0.2 percentage points. The proportion of Open Market owner occupied domestic property units increased by 0.3 percentage points between 2017 and 2018, compared to a decrease of 0.6 percentage points in the proportion of rented Open Market domestic property units.

For information on the number of people living in each tenure see www.gov.gg/population and for household incomes by tenure see www.gov.gg/household.

Table 2.7.1: Tenure of units by Market

Tenure		2018					
		No. units			% of total units		
		Local	Open	Total	Local	Open	Total
Private Market	Owner occupied	15,186	1,003	16,189	59.2	62.7	59.4
	Rented	7,160	564	7,724	27.9	35.3	28.4
Affordable Market	Social	2,346	0	2,346	9.2	0.0	8.6
	Intermediate	200	0	200	0.8	0.0	0.7
	Other	740	33	773	2.9	2.1	2.8
	Total	25,632	1,600	27,232	100.0	100.0	100.0

Figure 2.7.1: Tenure of Local Market units

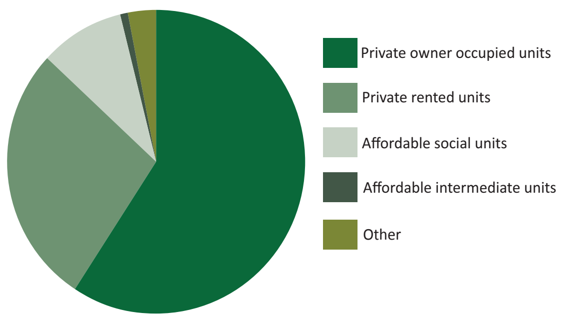


Table 2.7.2: Tenure of Local Market units

	Private Market		Affordable Market		Other
	Owner occupied	Rented	Social	Intermediate	
2013	14,954	6,728	2,062	112	928
2014	15,098	6,757	2,218	137	898
2015	15,120	6,920	2,273	142	803
2016	15,070	7,056	2,292	154	738
2017	15,146	7,032	2,331	169	726
2018	15,186	7,160	2,346	200	740

Figure 2.7.2: Tenure of Open Market units

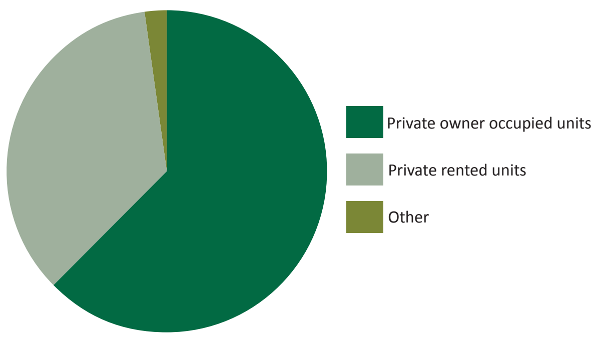


Table 2.7.3: Tenure of Open Market units

	Private Market		Affordable Market		Other
	Owner occupied	Rented	Social	Intermediate	
2013	1,015	547	0	0	26
2014	1,007	547	0	0	30
2015	1,003	568	0	0	32
2016	997	570	0	0	27
2017	991	570	0	0	28
2018	1,003	564	0	0	33

Table 2.8.1: Number and density of units by location

Parish			2018
	No. units	% of total units	No. units per km²
Castel	3,535	13.0	347
Forest	642	2.4	157
St Andrew	935	3.4	207
St Martin	2,773	10.2	379
St Peter Port	8,971	32.9	1,399
St Pierre du Bois	898	3.3	141
St Sampson	3,930	14.4	628
St Saviour	1,144	4.2	179
Torteval	407	1.5	131
Vale	3,997	14.7	448
Local Centres	1,404	5.2	1,368
Main Centre	10,964	40.3	1,852
Outside of the Centres	14,864	54.6	269
Total and overall density	27,232	100.0	428

Figure 2.8.1: Density of units by parish

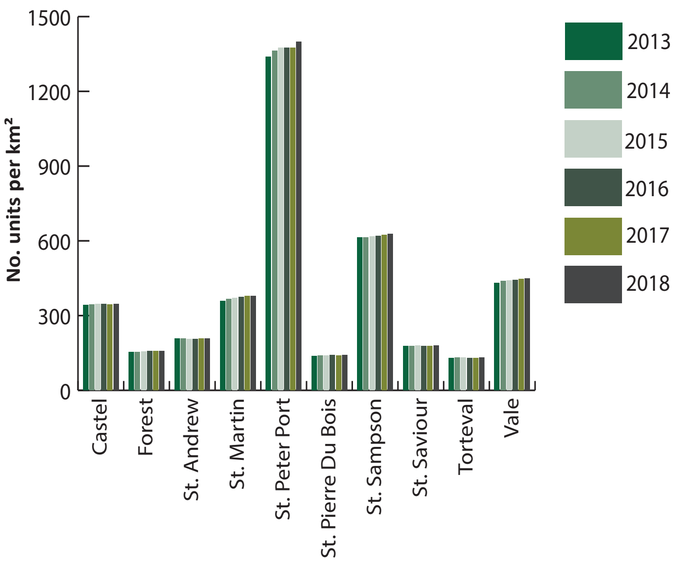


Table 2.8.2: Number of units by parish

Parish	2013	2014	2015	2016	2017	2018
Castel	3,481	3,507	3,521	3,523	3,516	3,535
Forest	630	633	641	641	641	642
St Andrew	935	935	931	931	933	935
St Martin	2,627	2,680	2,715	2,740	2,765	2,773
St Peter Port	8,589	8,742	8,816	8,813	8,816	8,971
St Pierre du Bois	884	894	898	898	894	898
St Sampson	3,837	3,842	3,860	3,871	3,900	3,930
St Saviour	1,139	1,140	1,143	1,140	1,140	1,144
Torteval	404	405	406	404	404	407
Vale	3,846	3,914	3,930	3,943	3,984	3,997
Total	26,372	26,692	26,861	26,904	26,993	27,232

The information on property units can be mapped spatially as well as being analysed numerically.

At the end of December 2018, 32.9% of all property units (8,971 of the total 27,232) were concentrated within the parish of St Peter Port (see **Table 2.8.1**).

St Sampson and Vale each contained more than 3,900 units, with 14.4% and 14.7% of the island's property units respectively. Castel, which is the island's largest parish by area, contained 3,535 (13.0%) of the units. Torteval, which is the smallest parish by area, contained the smallest number of property units, at 407 (1.5%).

The parish of St Peter Port had the highest density of units, with 1,399 units per square kilometre, 24 more than 2017. This is more than double the density of any other parish. The parish with the lowest density of property units was Torteval, which had 131 units per square kilometre.

St Peter Port showed the largest increase (155) in the number of units since 2017 (see **Table 2.8.2**).

Figure 2.8.2 shows the change in the density of domestic property units by location since 2013, with the greatest increase in density being seen in St Peter Port (382 units since 2013).

Table 2.8.3 on **page 12** shows the proportion of Local and Open Market units per parish. The proportion of Open Market units was highest in St Peter Port and St Martin (accounting for 9.5% and 9.6% in each respectively) and lowest in St Sampson where only 1.4% of the units were Open Market.

Figures 2.8.2 and **2.8.3** show the distribution of Local and Open Market units spatially. Just over half (53.3%) of the Open Market units in the island are situated in St Peter Port, in comparison to just under a third (31.7%) of all Local Market property units.

2.8 Domestic property units - location

In 2016, the States approved the Island Development Plan (IDP), which divides the island into three main administrative areas, Main Centres, Local Centres and Outside of the Centres. These areas operate different policies for the control of development. The introduction of these Centres replaces the Urban & Rural area plans reported in this Bulletin before 2016.

In line with the 2016 IDP, the Main Centre (marked with a blue outline on the maps throughout this bulletin) covers 10% of the island's land mass. The Main Centre is comprised of an Inner and Outer area as can be seen in **Figures 2.8.2** and **2.8.3.** Throughout this Report, 'Main Centre' refers to the inner and outer areas of the Main Centre combined. Further information can be found at **www.gov.gg/planningpolicy.**

Local Centres (in orange) are comprised of 7 small exisiting settlements beyond the Main Centre, incorporating a range of facilities and services which support the local population and act as community focal points. The remainder of the island is referred to as 'Outside of the Centres'.

Polices outlined in the IDP allow for housing development in the Main and Local Centres. In order to conserve and enhance the area, new development is only possible Outside of the Centres by converting a redundant building or by subdividing an existing dwelling. The IDP allocates 15 sites specifically for housing which are all located in the Main Centre.

The density of residential property units per square kilometre is nearly seven times greater in the Main Centre than Outside of the Centres. At the end of December 2018, 40.3% of all units were located within the Main Centre, 5.2% in the Local Centres and 54.6% Outside of the Centres.

More information on the location of units that were created or removed in 2018 is provided on **pages 23-25**.

Table 2.8.3: Location of units by Market

Location	2018					
	No. units			% of parish total units		
	Local	Open	Total	Local	Open	Total
Castel	3,406	129	3,535	96.4	3.6	100.0
Forest	611	31	642	95.2	4.8	100.0
St Andrew	882	53	935	94.3	5.7	100.0
St Martin	2,508	265	2,773	90.4	9.6	100.0
St Peter Port	8,119	852	8,971	90.5	9.5	100.0
St Pierre du Bois	844	54	898	94.0	6.0	100.0
St Sampson	3,874	56	3,930	98.6	1.4	100.0
St Saviour	1,081	63	1,144	94.5	5.5	100.0
Torteval	387	20	407	95.1	4.9	100.0
Vale	3,920	77	3,997	98.1	1.9	100.0
Local Centres	1,370	34	1,404	97.6	2.4	100.0
Main Centre	10,305	659	10,964	94.0	6.0	100.0
Outside of the Centres	13,957	907	14,864	93.9	6.1	100.0
Total	25,632	1,600	27,232	94.1	5.9	100.0

Figure 2.8.2: Map of Local Market units

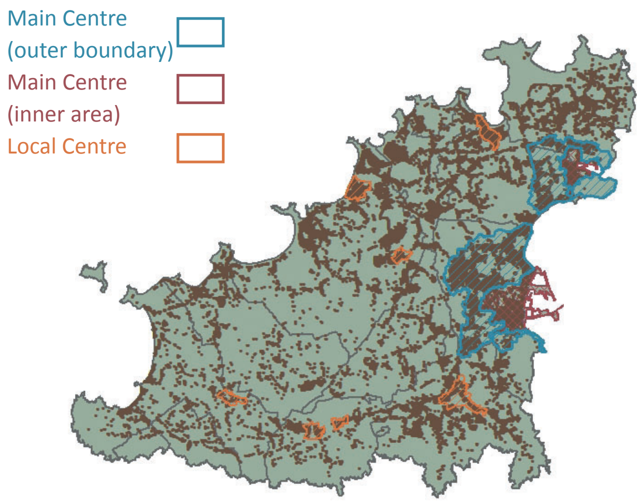
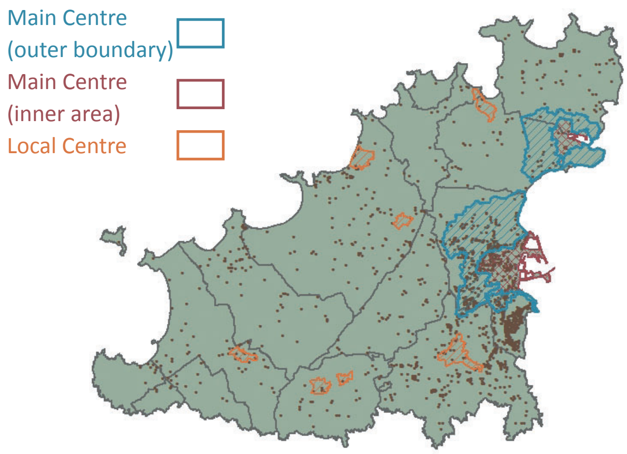


Figure 2.8.3: Map of Open Market units



2.9 Domestic property units - location and bedrooms

Table 2.9.1: Distribution of units by number of bedrooms and location

Location	2018					
	% of parish total units by no. bedrooms					
	1	2	3	4	Over 4	Unknown
Castel	11.2	19.6	43.0	13.2	5.0	8.1
Forest	6.5	21.7	36.3	13.9	5.5	16.2
St Andrew	5.7	21.1	37.0	16.4	11.1	8.8
St Martin	13.8	22.7	32.6	14.0	6.7	10.2
St Peter Port	25.3	30.1	22.2	9.4	4.3	8.7
St Pierre du Bois	9.1	21.3	28.8	16.3	10.7	13.8
St Sampson	17.6	28.2	33.9	9.9	3.4	7.0
St Saviour	6.8	21.7	35.5	17.1	6.7	12.2
Torteval	7.4	22.4	28.5	19.9	10.6	11.3
Vale	10.4	25.6	38.3	14.3	5.1	6.3
Local Centres	18.3	28.6	30.6	9.1	3.1	10.4
Main Centre	25.5	30.8	23.4	8.3	3.6	8.3
Outside of the Centres	9.3	21.8	38.0	15.4	6.7	8.8
	9.3%	21.8%	38.0%	15.4%	6.7%	8.8%
Total	16.3	25.8	31.7	12.2	5.3	8.7

* Numbers may not sum with those presented in the table due to rounding.

Table 2.9.1 shows the distribution of domestic property units across the island by their number of bedrooms.

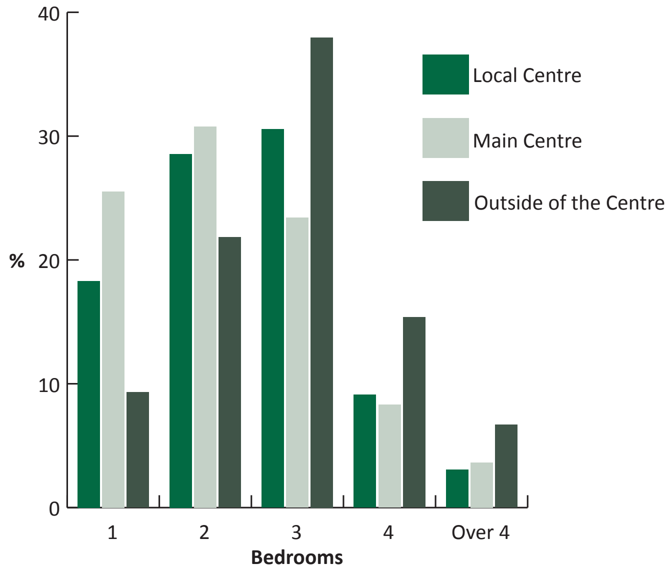
It can be seen from **Figure 2.9.1** that the Local and Main Centres tend to have more one and two bedroom property units (46.9% and 56.3% respectively) than Outside of the Centres (31.1%). The Main Centre has more than double the concentration of one bedroom property units than Outside of the Centres (25.5% compared with 9.3%)*.

Property units Outside of the Centres are more likely to contain three or four bedrooms than those in the Local and Main Centres (at 53.3%, 39.7% and 31.7% respectively).

57.5% of domestic property units across the island have two or three bedrooms, whilst only 5.3% have more than four bedrooms.

Three bedroom units make up the greatest proportion (31.7%) of all domestic property units across the island. This is true in all parishes except St Peter Port, where there are more one and two bedroom property units than three bedroom property units (25.3% and 30.1% versus 22.2% respectively).

Figure 2.9.1: Number of bedrooms distribution by location of unit



2.10 Domestic property units - location , TRP, type and bedrooms

By comparing the median number of domestic Tax on Real Property (TRP) units (i.e size) of units by Centre and the type and number of bedrooms, it can be seen that properties Outside of the Centre tend to be larger than those in Local and Main Centres. Please note that there are a small number of Local Centre units within each category.

The median number of domestic TRP units in 2018 was 154, remaining consistent since 2013. (See **page 9**.)

As described on **page 13**, property units Outside of the Centres tend to have a higher number of bedrooms than those in the Local and Main Centres, so could be expected to have a higher TRP. **Table 2.10.1** shows that in a like-for-like comparison, properties Outside of the Centres tend to be larger. For example, the median three bedroom house Outside of the Centres was larger by 18 TRP units than its comparator in the Local Centre and by 25 TRP units than its comparator in the Main Centre at the end of December 2018.

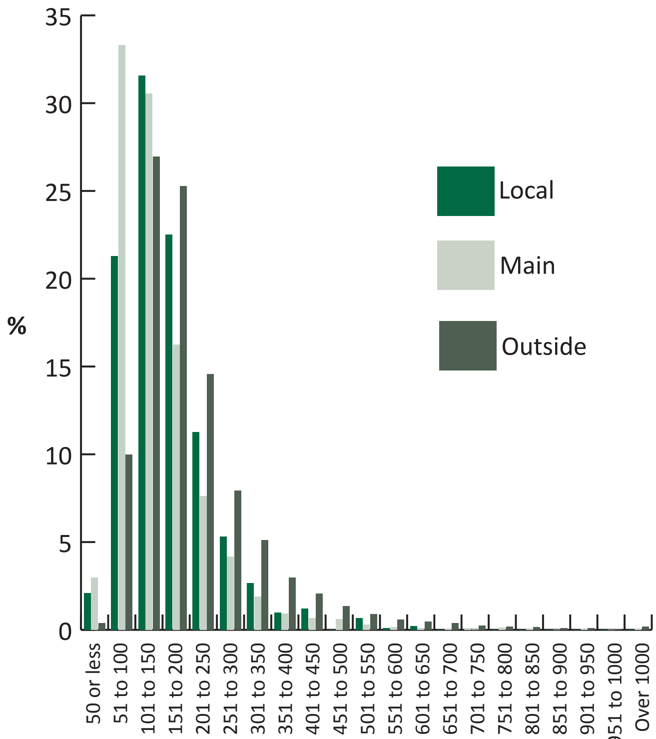
Overall, the median domestic TRP units Outside of the Centres was 51 units higher than in the Main Centre and 30 units higher than in the Local Centres at the end of December 2018.

The TRP distributions in **Figure 2.10.1** illustrate that the majority of Main Centre units fall into the 51 to 150 TRP units bands (63.8%), the majority of the Local Centre and the Outside of the Centres units fall into the 101 to 200 bands (54.1% and 52.2% respectively).

Table 2.10.1: Domestic TRP of Local, Main and Outside of the Centre units by type and number of bedrooms

Type	No. bedrooms	2018		
		Median TRP of Local Centre units	Median TRP of Main Centre units	Median TRP of units Outside of the Centres
Apartment	1	79	64	71
	2	84	85	96
	3	124	125	116
	4		145	113
	Over 4		79	87
Bungalow	1	73	82	114
	2	118	117	141
	3	160	141	167
	4	185	162	205
	Over 4	187	212	260
House	1	130	102	135
	2	106	108	143
	3	150	143	168
	4	220	202	267
	Over 4	312	273	379
All	1	80	68	95
	2	110	99	137
	3	155	142	167
	4	203	195	223
	Over 4	306	263	312
Overall median for all units		143	122	174

Figure 2.10.1: Domestic TRP distribution by location



3.1 Local Market units - tenure, type and number of bedrooms

Table 3.1.1: Type and number of bedrooms of Local Market units by tenure

Type	No. bedrooms	2018				
		Private Market		Affordable Market		
		Owner occupied	Rented	Social	Intermediate	Other
Apartment	1	15.1	63.8	17.3	2.0	1.9
	2	26.5	58.0	10.9	1.2	3.4
	3	26.8	55.3	10.8	1.3	5.8
	4	19.4	76.4	1.4	0.0	2.8
	Over 4	11.5	84.6	0.0	0.0	3.8
	Unknown	12.0	77.2	0.8	0.0	10.0
	Total	19.1	63.2	12.6	1.4	3.6
Bungalow	1	50.1	23.9	22.2	0.6	3.2
	2	78.7	16.9	2.4	0.0	1.9
	3	86.7	12.1	0.7	0.0	0.5
	4	87.8	11.7	0.0	0.0	0.5
	Over 4	87.8	11.5	0.0	0.0	0.7
	Unknown	63.1	29.5	0.1	0.0	7.2
	Total	80.6	15.3	2.5	0.1	1.5
House	1	43.9	19.2	26.7	2.6	7.6
	2	60.7	20.4	14.7	2.6	1.6
	3	65.8	12.1	20.8	0.8	0.6
	4	80.6	14.8	3.5	0.4	0.7
	Over 4	82.4	15.4	0.0	0.0	2.3
	Unknown	55.0	35.3	0.5	0.0	9.3
	Total	66.1	16.6	14.2	1.1	1.9
Other	1	1.2	10.6	0.0	0.0	88.2
	2	30.0	50.0	0.0	0.0	20.0
	3	36.4	27.3	4.5	0.0	31.8
	4	50.0	25.0	0.0	0.0	25.0
	Over 4	0.0	50.0	0.0	0.0	50.0
	Unknown	3.5	15.8	1.8	0.0	78.9
	Total	8.5	18.2	1.2	0.0	72.1
Total	1	23.5	51.5	18.8	1.8	4.5
	2	57	30.8	8.7	1.2	2.3
	3	74	14.1	10.6	0.4	0.9
	4	82.7	14.8	1.7	0.2	0.7
	Over 4	82.7	15.6	0	0	1.8
	Unknown	39.6	47.3	0.5	0	12.5
	Total	59.2	27.9	9.2	0.8	2.9

* Numbers may not sum with those presented in the table due to rounding.

This section focuses on Local Market domestic property units. Local Market properties can be occupied by people who have the appropriate Residence Certificates or Employment Permits.

Table 3.1.1 shows the proportions by tenure of different types of property units at the end of December 2018. Please refer to **page 31** for more information about tenure group classifications.

In total, 63.2% of Local Market apartments were privately rented, compared with 15.3% of bungalows and 16.6% of houses.

Affordable Social and Intermediate units together comprised 15.3% of houses, 2.6% of bungalows and 14.0% of apartments in the Local Market*.

The proportion of privately owned domestic property units decreased in 2018 compared with 2017, by 0.4 percentage points. The proportion of privately rented and Affordable domestic property units increased by 0.2 and 0.1 percentage points between 2017 and 2018. See **Table 2.7.2** on **page 10** for the number of Local Market units by tenure each year since 2013.

Please refer back to **Table 2.4.1** on **page 7** for the number of Local Market units by type and number of bedrooms.

3.1 Local Market units - tenure, type and number of bedrooms

The distribution of number of bedrooms by property unit type is shown for Local Market owner occupied, privately rented, Affordable socially rented and Affordable Intermediate (partially owned) units in **Figures 3.1.1**, **3.1.2**, **3.1.3** and **3.1.4** respectively.

As at the end of December 2018, the distributions were significantly different between each of the tenures.

The owner occupied units were predominantly houses and bungalows, the largest proportion of which had three bedrooms. However, of the one bedroom owner occupied units, more were apartments than houses or bungalows.

Apartments constituted the majority of privately rented units and most of these contained one or two bedrooms.

Bungalows formed a small portion of Affordable units, whilst three bedroom houses comprised the largest proportion of Affordable social units, followed by one bedroom apartments. One bedroom apartments accounted for the largest proportion of Affordable intermediate units, followed by two bedroom houses.

Figure 3.1.1: Number of bedrooms by type of Local Market owner occupied units

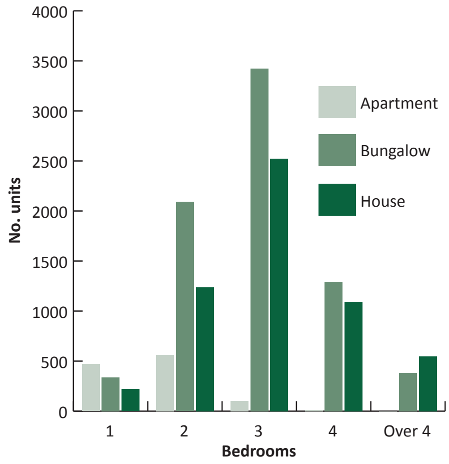


Figure 3.1.2: Number of bedrooms by type of Local Market rented units

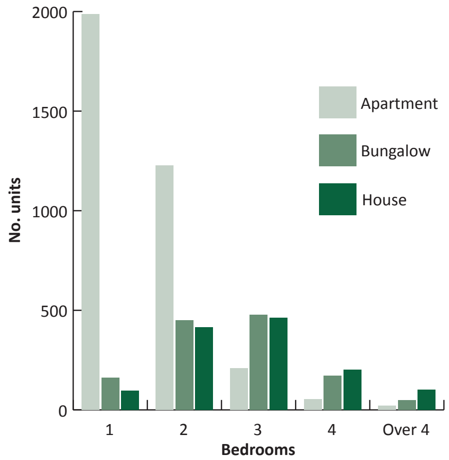


Figure 3.1.3: Number of bedrooms by type of Local Market Affordable social units

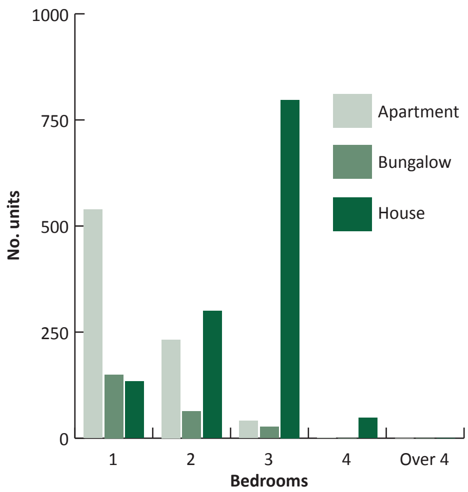
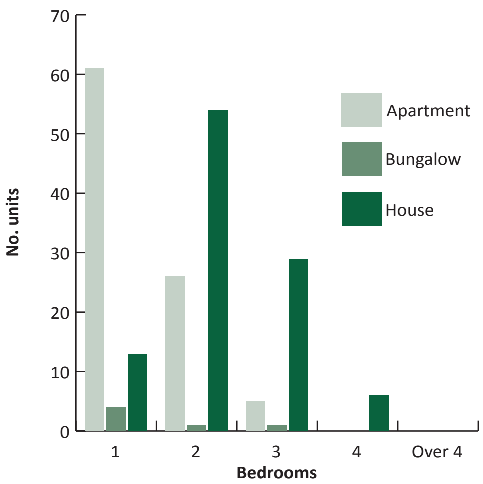


Figure 3.1.4: Number of bedrooms by type of Local Market Affordable intermediate units



3.2 Local Market units - tenure, TRP, type and number of bedrooms

Table 3.2.1: Domestic TRP of Local Market units by type and number of bedrooms by tenure

Type	No. bedrooms	2018	
		Median TRP of Local Market owner occupied units	Median TRP of Local Market rented units
Apartment	1	65	65
	2	86	86
	3	122	115
	4	105	133
	Over 4	66	85
Bungalow	1	109	82
	2	138	114
	3	164	145
	4	197	174
	Over 4	246	248
House	1	114	88
	2	117	106
	3	150	145
	4	213	210
	Over 4	293	278
All	1	79	68
	2	121	98
	3	157	143
	4	204	196
	Over 4	273	264
Overall median for all units		156	111

Table 3.2.2: Median domestic TRP of owner occupied Local Market units by number of bedrooms

	No. bedrooms					
	1	2	3	4	Over 4	Overall
2013	81	124	157	201	258	154
2014	81	123	158	201	260	154
2015	80	122	158	202	267	155
2016	80	121	157	203	269	155
2017	79	121	157	204	272	155
2018	79	121	157	204	273	156

Table 3.2.3: Median domestic TRP of rented Local Market units by number of bedrooms

	No. bedrooms					
	1	2	3	4	Over 4	Overall
2013	68	98	142	186	260	114
2014	69	98	142	195	263	113
2015	69	98	142	196	276	114
2016	68	98	143	193	276	113
2017	69	98	143	195	280	112
2018	68	98	143	196	264	111

Table 3.2.1 provides the median number of domestic TRP units of Local Market owner occupied and private rental units. It is broken down by unit types and number of bedrooms to enable comparison on a like-for-like basis.

At the end of December 2018, the overall median number of domestic TRP units for Local Market owner occupied units was 156 which was one unit more than at the end of 2017. This compares to a median TRP of 111 for rental units, which was one TRP unit lower than at the end of 2017 and two less than at the end of 2016.

Tracking these figures over time will provide an indication of changes in sizes of domestic property units.

Tables 3.2.2 and **3.2.3** show the change in the median TRP of owner occupied and rented domestic property units over time. The median TRP of owner occupied domestic property units with one, two, three or four bedrooms remained the same as 2017. The median TRP of property units with over four bedrooms increased by one TRP unit.

The median TRP of two and three bedroom privately rented domestic property units remained stable in 2018. There was an increase of one TRP unit in the median TRP of four bedroom property units compared to 2017. There were decreases in the size of domestic properties with one bedroom and more than four bedrooms, with their median TRP decreasing by one and 16 TRP units respectively, since 2017.

3.3 Local Market units - tenure and location

Table 3.3.1 gives the location (by parish and by Local, Main and Outside Centres) of Local Market property units by tenure. Units are mapped individually by tenure in Figures 3.3.1, 3.3.2, 3.3.3 and 3.3.4. For the purposes of this bulletin, 'Main Centre' refers to the outer and inner areas of the Main Centre combined.

In 2018, St Peter Port had the highest proportion (42.3%) of privately rented units, as well as the highest proportion of Affordable intermediate housing units (1.8%). St Martin had the highest proportion of Affordable social housing units (13.4%).
There was a higher concentration of Affordable housing units in the Local and Main Centres (18.0% and 10.8% respectively) compared with Outside of the Centres (7.1%). In the Main Centre, 45.5% of domestic property units were owner occupied, compared with 53.8% in the Local Centres and 69.9% Outside of the Centres (which was, respectively, 0.5 percentage points lower, 0.1 percentage points higher and 0.3 lower than at the end of 2017).

Table 3.3.1: Tenure of Local Market units by location

Location	2018				
	Private Market		Affordable Market		
	Owner occupied	Rented	Social	Intermediate	Other
Castel	65.1	20.1	11.3	0.3	3.1
Forest	64.3	22.6	5.6	0.0	7.5
St Andrew	71.8	18.1	6.9	0.0	3.2
St Martin	60.6	18.6	13.4	0.8	6.5
St Peter Port	42.6	42.3	10.6	1.8	2.7
St Pierre du Bois	64.9	26.2	2.1	0.0	6.8
St Sampson	67.0	24.3	7.6	0.4	0.7
St Saviour	67.3	21.2	7.2	0.0	4.3
Torteval	76.0	21.7	0.0	0.0	2.3
Vale	71.4	20.4	7.1	0.2	1.0
Local Centres	53.8	23.0	18.0	0.8	4.5
Main Centre	45.5	40.0	10.8	1.4	2.3
Outside of the Centres	69.9	19.5	7.1	0.3	3.2
Total	59.2	27.9	9.2	0.8	2.9

Figure 3.3.1: Map of Local Market owner occupied units

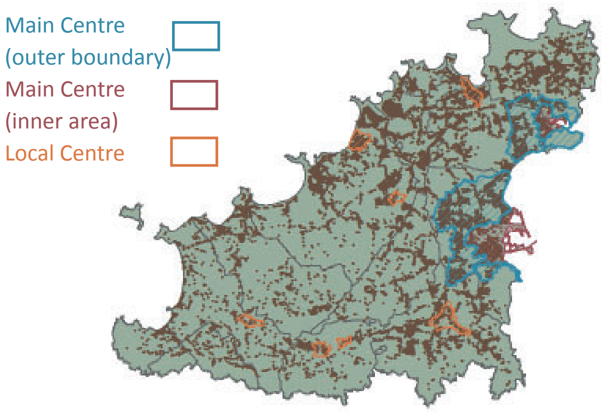


Figure 3.3.2: Map of Local Market privately rented units

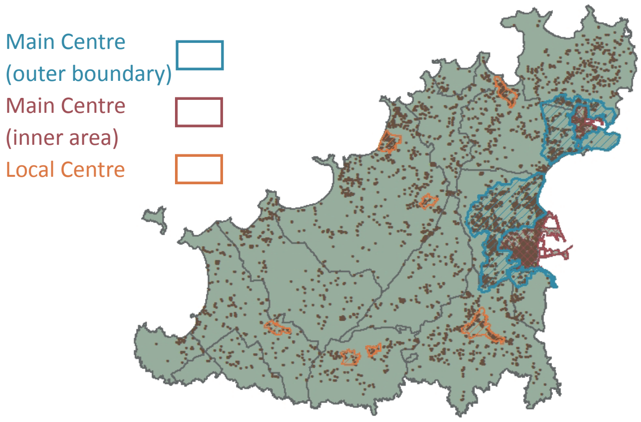


Figure 3.3.3: Map of Local Market Affordable social units

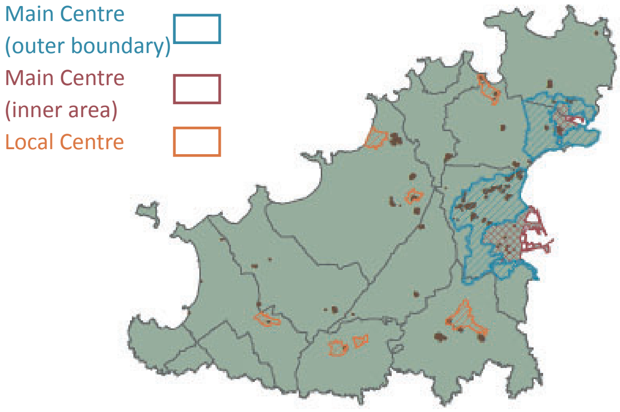
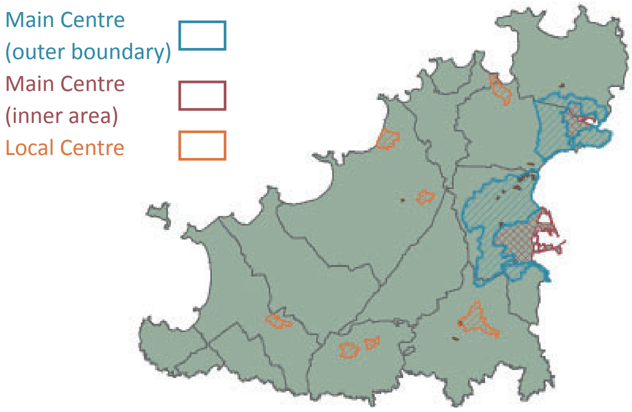


Figure 3.3.4: Map of Local Market Affordable intermediate units



4.1 Open Market units - tenure, type and number of bedrooms

Table 4.1.1: Type and number of bedrooms of Open Market units by tenure

Type	No. bedrooms	2018		
		Private Market		
		Owner occupied	Rented	Other
Apartment	1	19.2	80.8	0.0
	2	25.0	75.0	0.0
	3	37.5	62.5	0.0
	4	8.3	91.7	0.0
	Over 4	0.0	100.0	0.0
	Unknown	22.9	71.4	5.7
	Total	24.3	74.6	1.2
Bungalow	1	50.0	37.5	12.5
	2	84.6	13.5	1.9
	3	67.6	31.0	1.4
	4	72.8	27.2	0.0
	Over 4	67.5	30.0	2.5
	Unknown	59.1	36.4	4.5
	Total	70.5	27.8	1.7
House	1	46.2	53.8	0.0
	2	69.1	29.4	1.5
	3	65.0	33.6	1.4
	4	68.1	31.3	0.6
	Over 4	70.3	28.6	1.1
	Unknown	64.4	32.7	2.9
	Total	67.0	31.8	1.2
Other	1	0.0	0.0	100.0
	2	0.0	0.0	100.0
	3	100.0	0.0	0.0
	4	0.0	100.0	0.0
	Over 4	100.0	0.0	0.0
	Unknown	18.2	0.0	81.8
	Total	23.5	5.9	70.6
Total	1	34.4	62.3	3.3
	2	57.5	40.3	2.2
	3	63.9	34.7	1.3
	4	67.2	32.3	0.5
	Over 4	69.1	29.6	1.3
	Unknown	52.3	39	8.7
	Total	62.7	35.3	2.1

This section gives more detailed information on Open Market domestic property units. Open Market properties can be occupied by anybody regardless of their residential qualifications.

Table 4.1.1 shows the proportions by tenure of different types of property units at the end of December 2018. Please refer to **page 31** for more information about tenure group classifications.

Please note that some of these categories contain low numbers of property units, particularly the "other" category.

The proportion of owner occupied Open Market domestic property units increased by 0.3 percentage points when compared to 2017, whilst the proportion of privately rented Open Market domestic property units decreased by 0.6 percentage points. The proportion of other domestic property units increased by 0.3 percentage points, compared to the previous year.

Of Open Market apartments, bungalows and houses, bungalows saw the biggest change in the proportion of owner occupied domestic property units, with an increase of 1.7 percentage points compared to 2017. The proportion of rented Open Market bungalows decreased by 2.3 percentage points.

The proportion of rented Open Market houses decreased by 0.6 percentage points, whilst there was an increase (0.3 percentage points) in the proportion of owner occupied houses.

Please refer back to **Tables 2.2.1** and **2.3.1** on **pages 5** and **6** for the number of Open Market units by type and number of bedrooms.

4.1 Open Market units - tenure, type and number of bedrooms

The distribution of number of bedrooms by property unit type at the end of December 2018 is shown for Open Market owner occupied and rented units in **Figures 4.1.1** and **4.1.2** respectively.

The two distributions are more similar to each other than the Local Market owner occupied and rental distributions.

The distribution by number of bedrooms of Open Market bungalows and houses are similar for owner occupied and rented units. In 2018, as in 2017, the largest proportion of owner occupied and rented Open Market bungalows were those with three bedrooms, whilst the four bedroom category comprised the greater proportion of owner occupied Open Market houses.

Both owner occupied and rented Open Market apartments showed a peak in units with two bedrooms, but the proportion was far greater in the rented Open Market apartments.

Figure 4.1.1: Number of bedrooms by type of Open Market owner occupied units

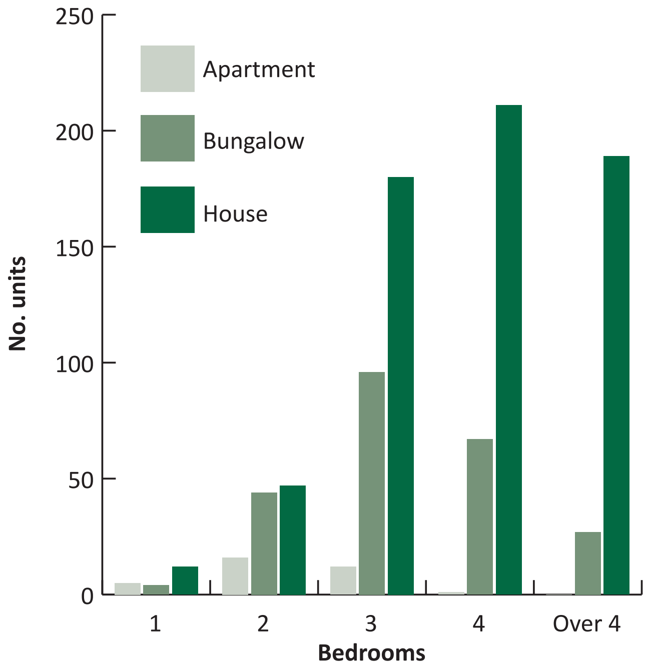
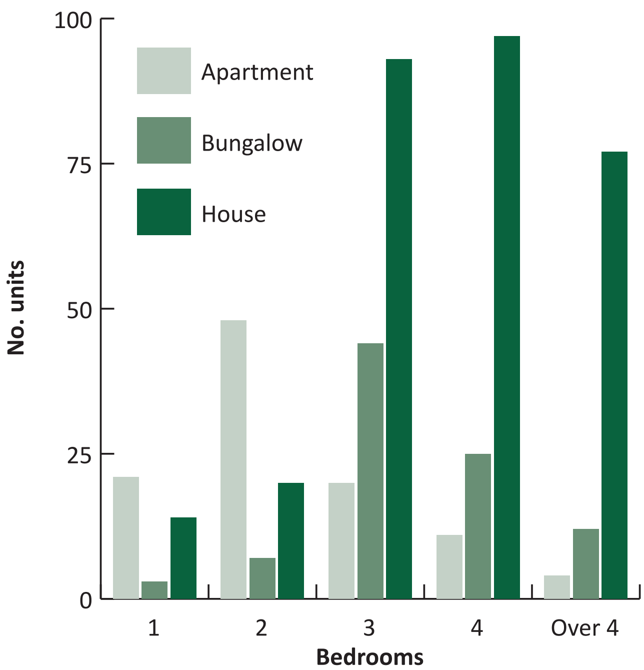


Figure 4.1.2: Number of bedrooms by type of Open Market rented units



4.2 Open Market units - tenure, TRP, type and number of bedrooms

Table 4.2.1: Domestic TRP of Open Market units by type and number of bedrooms by tenure

Type	No. bedrooms	2018	
		Median TRP of Open Market owner occupied units	Median TRP of Open Market rented units
Apartment	1	106	43
	2	127	165
	3	174	207
	4	-	257
	Over 4	-	292
Bungalow	1	327	201
	2	267	233
	3	283	254
	4	323	311
	Over 4	396	418
House	1	327	268
	2	346	244
	3	316	261
	4	344	293
	Over 4	475	434
All	1	300	112
	2	261	198
	3	297	255
	4	340	294
	Over 4	460	422
Overall median for all units		342	281

Table 4.2.2: Median domestic TRP of owner occupied Open Market units by number of bedrooms

	No. bedrooms					
	1	2	3	4	Over 4	Overall
2013	327	267	292	346	457	334
2014	317	264	297	350	459	334
2015	327	264	304	342	442	339
2016	300	261	300	342	457	340
2017	281	263	301	337	474	340
2018	300	261	297	340	460	342

Table 4.2.3: Median domestic TRP of rented Open Market units by number of bedrooms

	No. bedrooms					
	1	2	3	4	Over 4	Overall
2013	208	218	261	307	419	280
2014	220	220	257	292	423	280
2015	208	214	245	289	435	275
2016	106	212	253	299	422	279
2017	106	214	254	295	422	279
2018	112	198	255	294	422	281

Table 4.2.1 provides the median number of domestic TRP units of Open Market owner occupied and rental units. It is broken down by unit types and number of bedrooms to enable comparison on a like-for-like basis.

At the end of December 2018, the overall median number of domestic TRP units of Open Market owner occupied property units was 342, two TRP units higher than at the end of December 2017. The median number of TRP units for rented Open Market domestic property units was 281, which was also two units higher than a year earlier.

Rented bungalows and houses in the Open Market of the same number of bedrooms tend to have a consistently lower number of TRP units (i.e. are smaller in floor area) than their owner occupied equivalents.

Tables 4.2.2 and **4.2.3** show the change in the median TRP of owner occupied and rented Open Market domestic property units over time. The median TRP of Open Market owner occupied domestic property units decreased across all bedroom categories since 2017, with the exception of one bedroom and four bedroom domestic property units (see **Table 4.2.3**).

The median TRP of rented properties with one bedroom increased by six TRP units whilst the median TRP of properties with two bedrooms decreased by sixteen TRP units between December 2017 and 2018 (see **Table 4.2.3**).

Please note that some of these categories contain low numbers of property units.

4.3 Open Market units - tenure and location

Table 4.3.1 gives the location of Open Market property units by tenure. Units are mapped individually by tenure in **Figures 4.3.1** and **4.3.2.** For the purposes of this bulletin, 'Main Centre' refers to the outer and inner areas of the Main Centre combined.

St Andrew had the highest proportion of owner occupied domestic property units (79.2%), whilst the Forest had the lowest proportion (54.8%). Please note that Torteval, Forest and St Andrew have the smallest number of Open Market units.

St Peter Port had the highest proportion of Open Market rented units (42.4%) at the end of December 2018. This was 1 percentage point lower than at the end of December 2017.

As seen in the Local Market, there was a higher proportion of owner occupation in the Local Centres and Outside of the Centres (73.5% and 70.1% respectively) compared with the Main Centre (51.9%). The proportion of owner occupied domestic property units rose across the Local Centres and Outside of the Centres at the end of December 2018 compared with the end of December 2017, increasing by 5.0 and 1.0 percentage points respectively. The number of units in the Main Centre decreased by 0.7 percentage points since 2017. There was a decrease in the proportion of rented domestic property units in the Local Centres and Outside of the Centres since 2017 and an increase in rented units in the Main Centre, with a change of 5.0, 1.6 and 0.8 percentage points respectively.

Over half (53.3%) of Open Market domestic property units are located in St Peter Port where owner occupation was 0.8 percentage points higher in 2018 than in 2017.

Table 4.3.1: Tenure of Open Market units by location

Location			2018
			% of units
	Owner occupied	Rented	Other
Castel	72.1	26.4	1.6
Forest	54.8	38.7	6.5
St Andrew	79.2	18.9	1.9
St Martin	69.8	27.9	2.3
St Peter Port	55.8	42.4	1.9
St Pierre du Bois	77.8	20.4	1.9
St Sampson	69.6	28.6	1.8
St Saviour	69.8	27.0	3.2
Torteval	75.0	20.0	5.0
Vale	66.2	32.5	1.3
Local Centres	73.5	23.5	2.9
Main Centre	51.9	46.1	2.0
Outside of the Centres	70.1	27.8	2.1
Total	62.7	35.3	2.1

Figure 4.3.1: Map of Open Market owner occupied units

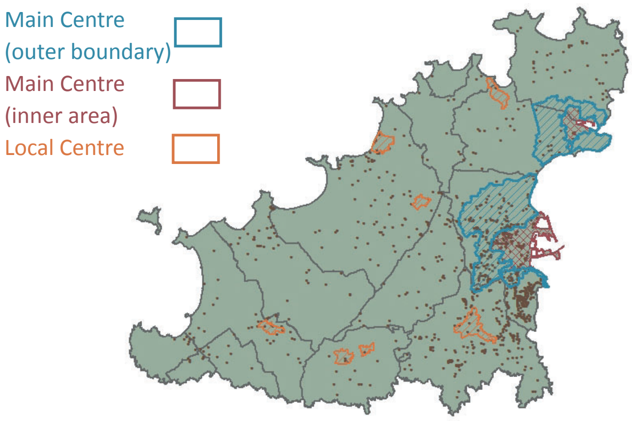
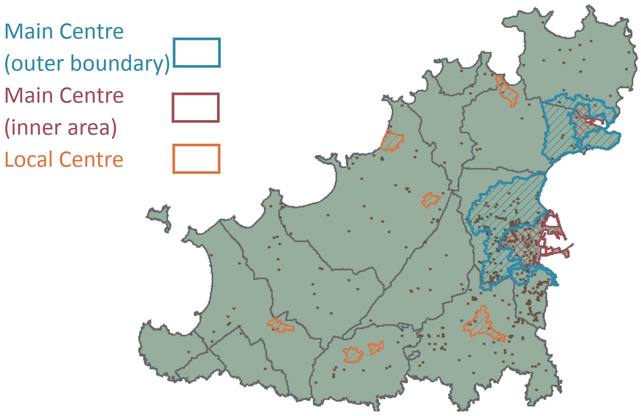


Figure 4.3.2: Map of Open Market rented units

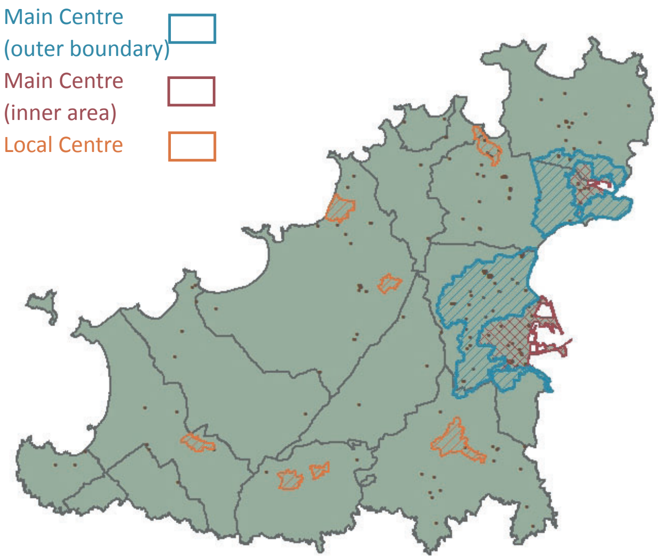


5.1 Changes to the number of units

Table 5.1.1: Change in number of units by type of change

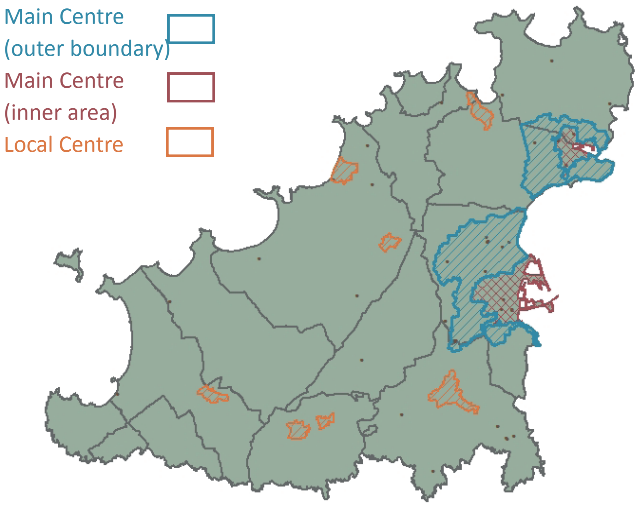
Type of change	2018		
	Plus	Minus	Net change
New build	234	0	234
Demolition	0	44	-44
Subdivision	35	0	35
Amalgamation	0	9	-9
Conversion	18	2	16
Total	287	55	232
Administrative amendments	23	16	7
Total including administrative amendments	310	71	239

Figure 5.1.1: Map of units created in 2018*



* Map includes administrative amendments

Figure 5.1.2: Map of units removed in 2018



Since December 2010, changes to the number of domestic property units have been recorded by the type of change, as shown in **Table 5.1.1**.

Additional units created are classified as being new builds (when new units have been constructed either as a replacement to a previously demolished property or as a new development or extension), subdivisions (when existing units have been divided to create more units) or conversions (when an existing building has been changed from non-domestic to domestic use).

Units are classed as having been created when the building has both been surveyed and had a postal address allocated to it by Guernsey Digimap Services. **Figure 5.1.1** shows the location of the units created during 2018.

Units removed are classified as being demolitions (when they have been wholly or partially razed to the ground, including those that are subsequently replaced with a new build), amalgamations (when existing units have been joined to create fewer units) or conversions (where an existing building has been changed from domestic to non-domestic use). **Figure 5.1.2** shows the location of the units removed during 2018.

Subdivision can also result in the removal of units (albeit with a net increase in units), when the original unit no longer exists as a result of the division into a larger number of units.

Units are classed as having been removed when the building has either been partially or completely removed or the address has been "de-activated" by Guernsey Digimap Services.

Further additional units have been included or removed from the total since 2013 as a result of administrative changes as further information on existing properties has become available.

5.1 Changes to the number of units

During 2018, using the definitions on **page 23**, 287 new units were created and 55 were removed; a net change of 232.

There was a further net increase of 7 due to administrative amendments at the end of 2018. An administrative amendment includes, for example, the inclusion of a small domestic property above a commercial unit, the existence of which was not previously known (see **Table 5.1.1**).

Tables 5.1.2, **5.1.3**, **5.1.4** and **Figures 5.1.1** and **5.1.2**, along with the analysis below, refer to the changes resulting from units created and removed only i.e. excluding the administrative amendments.

As shown in **Table 5.1.2**, the parish with the largest net change in units was St Peter Port (152). The second largest net change in the number of units was in St Sampson with an overall increase of 32 units.

Overall, there was a net change of 5 units in Local Centres, compared to a net change of 1 at the end of 2017 (see **page 25**). There was a net change of 158 units in the Main Centre during 2018, and 69 Outside of the Centres, which was 127 and 15 units more than during 2017, respectively.

Of the 232 net additional units in 2018, 46 were Affordable housing units and 186 were either private market housing units (owner occupied and rented) or other housing types (staff, self-catering and vacant accommodation).

Table 5.1.2: Net change* in number of units by parish and type of change

Location	2018			
	Net change from new builds and demolitions	Net change from amalgamations and subdivisions	Net change from conversions	Net change total
Castel	13	-1	4	16
Forest	1	-1	0	0
St Andrew	-2	1	1	0
St Martin	4	2	0	6
St Peter Port	132	16	4	152
St Pierre du Bois	1	1	1	3
St Sampson	26	4	2	32
St Saviour	2	2	0	4
Torteval	4	0	0	4
Vale	9	2	4	15
Total	190	26	16	232

Table 5.1.3: Net change* in number of units by area and type of change

Location	2018			
	Net change from new builds and demolitions	Net change from amalgamations and subdivisions	Net change from conversions	Net change total
Local Centres	0	3	2	5
Main Centre	139	16	3	158
Outside of the Centres	51	7	11	69
Total	190	26	16	232

Table 5.1.4: Net change* in number of units by tenure type and type of change

Location	2018			
	Net change from new builds and demolitions	Net change from amalgamations and subdivisions	Net change from conversions	Net change total
Affordable Market	46	0	0	46
Private Market (and other)	144	26	16	186
Total	190	26	16	232

* Net change excludes administrative amendments

5.1 Changes to the number of units

Table 5.1.5: Change in the total number of units by year

Change	Year					
	2013	2014	2015	2016	2017	2018
Plus	241	367	185	132	127	287
Minus	70	71	41	89	41	55
Net Change	171	296	144	43	86	232
Administrative amendments	29	24	25	0	3	7
Change in total no. of units	200	320	169	43	89	239

Table 5.1.6: Net change* in the total number of units by parish

Parish	Year					
	2013	2014	2015	2016	2017	2018
Castel	2	23	13	-1	20	16
Forest	0	2	6	0	-1	0
St Andrew	5	-1	-4	0	2	0
St Martin	27	50	34	23	24	6
St Peter Port	116	141	64	3	10	152
St Pierre du Bois	0	8	0	0	-5	3
St Sampson	7	3	15	11	24	32
St Saviour	6	2	3	-3	-1	4
Torteval	1	2	0	-2	0	4
Vale	7	66	13	12	13	15
Total	171	296	144	43	86	232

Table 5.1.7: Net change* in the total number of units by area

Area	Year			
	2011	2016	2017	2018
Local Centres	1	28	1	5
Main Centre	176	24	31	158
Outside of the Centres	54	-9	54	69
Total	231	43	86	232

Table 5.1.8: Net change* in the total number of units by tenure type

Tenure	Year					
	2013	2014	2015	2016	2017	2018
Affordable Market	102	135	54	35	56	46
Private Market (and other)	69	161	90	8	30	186
Total	171	296	144	43	86	232

* Net change excludes administrative amendments

Table 5.1.5 shows the change in the total number of units from 2013 to 2018. The number of administrative changes has decreased from 29 in 2013 to 7 in 2018. During 2018, there was an increase of 287 units, the highest for four years. The number of removed units was 14 more than in 2017, with a loss of 55 units.

Tables 5.1.6 and **5.1.7** show the change in the total number of units by parish and area (i.e.Local, Main and Outside of the Centres) respectively. In the five years ending in 2018, 50.0% of the increase in the total number of domestic property units has been situated within St Peter Port. Torteval and St Andrew have contributed the smallest proportion of the change, accounting for 0.5% and 0.2% of the increase in domestic property units respectively.

Information on properties located in Local Centres, Main Centres and Outside of the Centres is available for 2011, 2016, 2017 and 2018 only. In future years, we will be better able to track trends over time.

Affordable (social and intermediate) housing units, (see **Table 5.1.8**) accounted for 19.8% of the increase in the total number of domestic property units in 2018.

5.1 Changes to the number of units

Information on properties created and removed between 2011 and 2018 are shown on the maps in **Figures 5.1.3** and **5.1.4**.

In 2011, 70.6% of new units created were located in the Main Centre (see **Figure 5.1.3**) compared to 53.0% of new units in 2016, 37.8% in 2017 and 64.8% in 2018. In 2011, 43.8% of removed units were in the Main Centre compared to 51.7%, 41.5% and 50.9% in 2016, 2017 and 2018 respectively (see **Figure 5.1.4**). Administrative amendments were not included in these calculations.

Figure 5.1.3: Map of units created between 2011 and 2018 inclusive

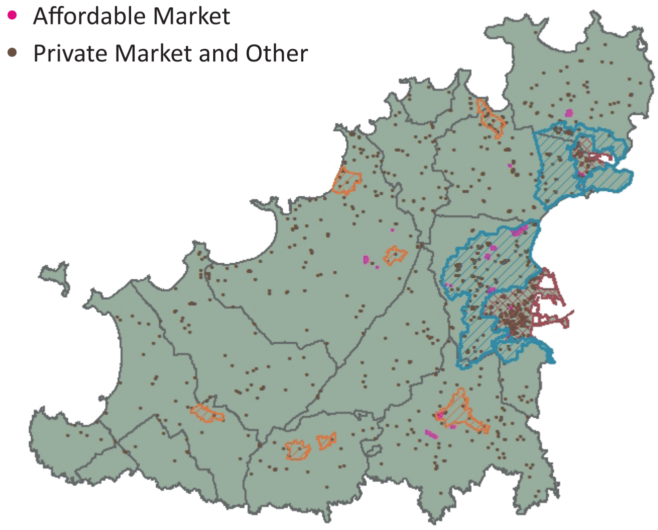
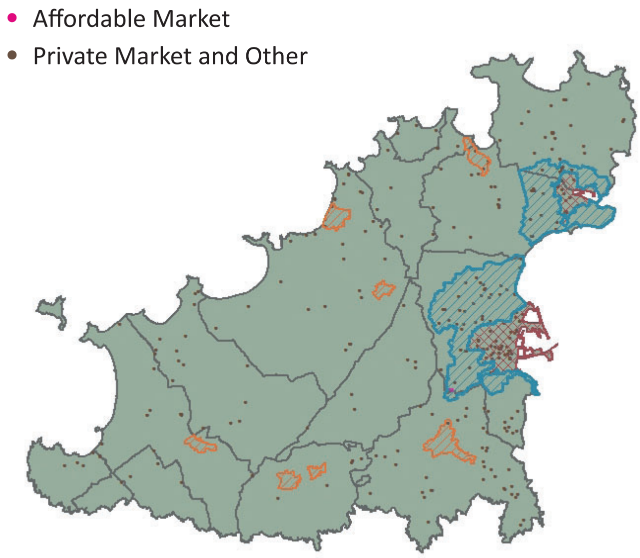


Figure 5.1.4: Map of units removed between 2011 and 2018 inclusive



6.1 Vacant units

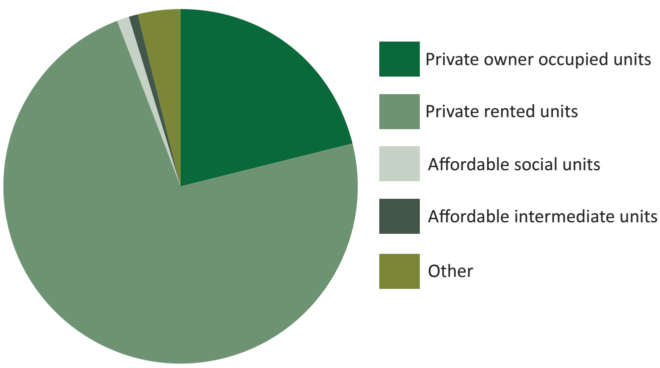
Table 6.1.1: Number of vacant units by market

Year	No. vacant units			% of island total units
	Local	Open	Total	
2014	187	8	195	0.7
2015	212	13	225	0.8
2016	135	6	141	0.5
2017	131	7	138	0.5
2018	142	13	155	0.6

Table 6.1.2: Tenure of vacant units by market

Tenure		2018			
		Local	Open	Total	% of unit
Private Market	Owner Occupied	27	6	33	0.2
	Rented	107	6	113	1.5
Affordable Market	Social	2	0	2	0.1
	Intermediate	1	0	1	0.5
Other		5	1	6	0.8
Total		142	13	155	0.6

Figure 6.1.1: Tenure of vacant units



The methodology for calculating the number of vacant domestic property units is currently being refined and therefore this data should be used with caution.

As in previous years, properties with low or zero electricity consumption over the year (and without other evidence to suggest that they have been occupied) were classified as potentially vacant. This list of vacant properties was then matched against address data taken from the Rolling Electronic Census in 2018. Properties which showed low or zero electricity consumption for a year or more, which also had no record of anyone living at that address at the beginning of 2018, were classified as vacant. This methodology results in lower levels of vacant properties than previously reported. It is not possible to extract accurate address data from the Rolling Electronic Census for years prior to 2014, so earlier comparisons of vacant units using this method cannot be made.

All residential tenures of domestic units (e.g. self-catering and social units) are included.

In December 2018, 155 (0.6%) of the island's domestic property units had been vacant for a year or more. This compares with 138 in the year ending December 2017. (See **Table 6.1.1**).

Table 6.1.2 shows the number of vacant properties broken down by market and tenure. 1.5% of privately rented units (113 units) had been classified as vacant for a year or more at the end of December 2018.

As can be seen from **Figure 6.1.1**, privately rented units had the highest proportion of vacant units (72.9%), compared with 21.3% for owner occupied units and 1.9% for Affordable units at the end of December 2018. The remaining 3.9% of vacant properties had a tenure type of other, which includes self-catering units and staff accommodation.

7.1 Specialised housing

This section provides more detail on specialised housing which exists within the private and Affordable parts of the Local Market and in the Open Market.

Specialised housing refers to units that involve some element of care; Residential and Nursing homes as well as any extra care accommodation are categorised as specialised. Specialised housing can accommodate people of any age, however some developments have age restrictions for residents. Residential and Nursing homes are not included in the data presented in any other section of this Bulletin, resulting in a higher grand total of units.

Prior to 2017, the term "supported" was used to refer to sheltered and extra-care accommodation. Specialised housing does not include sheltered accommodation and therefore the number of supported housing units published in Bulletins before 2017 and the number of specialised housing units reported within this Bulletin are not comparable, but a full time series is included here.

At the end of 2018, 271 (1%) of the 27,255 property units in Guernsey, including Residential and Nursing homes, were specialised. Of these, 61.3% (166 units) were located in the Affordable market and 105 units were located in the private market, 95 in the Local Market and 10 in the Open Market (see **Figure 7.1.1**). Non-specialised housing made up 96.2% of the 27,255 total (**Table 7.1.1**)*.

The proportion of specialised housing differs between the Local and Open Market. The proportion of Open Market specialised housing units made up 0.6% of the total number of Open Market units compared to 1.0% of Local Market units.

Table 7.1.2 shows an increase in specialised housing since 2013, especially in the Affordable market.

Table 7.1.1: Specialised housing by Market**

Tenure		2018					
		No. units			% of total units		
		Local	Open	Total	Local	Open	Total
Specialised	Private Market	95	10	105	0.4	0.6	0.4
	Affordable Market	166	0	166	0.6	0.0	0.6
Non-specialised	Private Market	22,262	1567	23,829	86.8	97.3	87.4
	Affordable Market	2,382	0	2,382	9.3	0.0	8.7
Other		740	33	773	2.9	2.0	2.8
Total		25,645	1,610	27,255	100.0	100.0	100.0

* Numbers may not sum with those presented in the table due to rounding.

Figure 7.1.1: Specialised housing units by Market**

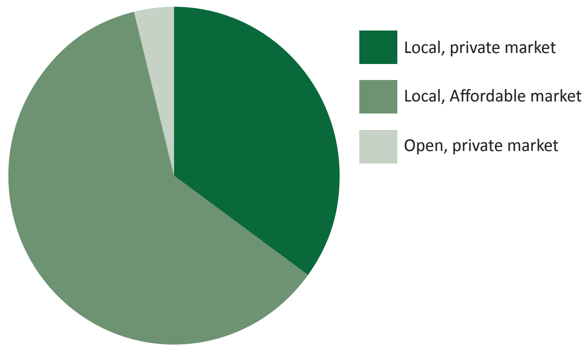


Table 7.1.2: Specialised Local Market units**

	Specialised		Non-specialised		Other
	Private Market	Affordable Market	Private Market	Affordable Market	
2013	78	2	21,590	2,201	928
2014	97	102	21,770	2,255	898
2015	97	119	21,955	2,298	803
2016	95	151	22,041	2,297	738
2017	98	165	22,093	2,337	726
2018	95	166	22,262	2,382	740

Table 7.1.3: Specialised Open Market units**

	Specialised	Non-specialised	Other
	Private Market	Private Market	
2013	9	1,562	26
2014	11	1,554	30
2015	11	1,571	32
2016	10	1,567	27
2017	10	1,561	28
2018	10	1,567	33

** including Residential and Nursing homes

7.2 Specialised housing- number of bedrooms and location

Table 7.2.1: Number of bedrooms of specialised housing units

No. bedrooms	2018	
	Private Market	Affordable Market
1	21.0%	37.6%
2	10.0%	22.5%
3	0.0%	0.0%
4	0.0%	0.0%
Over 4	7.4%	0.0%
Unknown	0.4%	1.1%
Total	38.7%	61.3%

* Numbers may not sum with those presented in the table due to rounding.

This section focuses on specialised housing by number of bedrooms and location.

Table 7.2.1 shows that 58.7% of specialised housing units had one bedroom; 37.6% in the Affordable market. Two bedroom apartments accounted for 32.5% of the total specialised housing units. The remaining 8.9% consisted of Residential and Nursing homes.*

At the end of December 2018, no bungalows were categorised as specialised.

96.3% of all specialised housing units were located in the Local Market. The remaining 3.7% of Open Market units were Residential or Nursing homes and had more than four bedrooms.

In total, over 60% of all specialised housing units were located in the Affordable market (**see Table 7.2.1**).

Le Grand Courtil and Nouvelle Maraitaine are located in St Martin and Vale respectively. These parishes had the highest proportion of specialised units (3.3% and 1.9% of all property units within those parishes, respectively) at the end of December 2018. St Peter Port had the third highest proportion of specialised housing units (1% of the 8,978 total), where Rosaire Court and Gardens is located.

At the end of December 2018, every parish contained a Residential or Nursing home with the exception of St Pierre du Bois.

8.1 Definitions and categories used

Domestic Property Units

A domestic property unit is defined (for the purposes of this bulletin) as being a building, or part of a building, which has its own postal address, is self contained and is used for residential purposes (including those which are vacant). For example, an individual flat is counted as one unit, as is a farmhouse. A building containing several individually rented rooms, but shared access and shared cooking and washing facilities (i.e. the individual rooms are not self contained) is also counted as one unit.

All domestic property units owned by individuals, businesses and the States of Guernsey are included. Business property units, which have a residential element (such as hotels, lodging houses, nursing or care homes) are not included in this data, other than **Section 7** where Residential and Nursing homes are included. Domestic units in multiple occupancy (i.e. those occupied by a number of unrelated people, typically on separate tenancy agreements) are included in this Bulletin.

Open and Local Market Units

The island's property stock is split into two categories: Open Market and Local Market and the Population Management Law governs which housing is Open Market. Open Market housing is divided into four parts (A, B, C and D), which relate to the use type (see **www.gov.gg/pmopenmarket** for more information). The data in this bulletin, with the exception of **Section 7**, only includes private and social housing units, so any references to Open Market units relate to Open Market Part A housing, plus a small number of Open Market Part B properties which are used as staff accommodation. A small number of Open Market Part C properties are included in **Section 7** which relate to Residential and Nursing homes.

Building Types of Domestic Property Unit

The building types used throughout this bulletin are grouped into four categories; apartment, bungalow, house and other. The category of building type a unit falls into is determined by its physical properties and proximity to other buildings:

Apartment is the category for a unit of accommodation that is attached to or contained within a larger building (the remainder of which may or may not be used for domestic purposes). This category covers flats, bedsits, wings, annexes, maisonettes, dower units and similar, where the unit has a separate postal address to other units within the building. These units can span one or more storeys.

Bungalow is the category for a property unit (including chalet bungalows and cottages), which has one or one and a half storeys, is not contained within a larger building and can be detached, semi-detached or terraced. It can also have an apartment attached to or contained within it (e.g. a wing or a flat) - each unit is identified by having a separate postal address.

Units which have two or more storeys and (as per bungalows), are not contained within a larger building, can be detached, semi-detached or terraced and can have an apartment attached or contained within them, are categorised as houses.

The "other" category captures building types which do not fall within any of the above categories. They tend to be property units which were not initially designed for domestic use (e.g. commercial buildings or barns), but have since had their use changed without physical alteration to the building.

8.1 Definitions and categories used

Tenure of Domestic Property Units

The tenure categories have been changed this year to better show trends in particular types of housing. Historic figures have been re-aligned with the new groupings to enable a like-for-like comparison. The changes only impact on Local Market units. The tenure describes the basis on which households occupy the property unit and the categories used are defined as follows:

The Owner Occupied category covers units which are occupied by their owners' household (and possibly also other households). This includes properties which can be purchased only by older people.

The Rented category covers units which are occupied by a household (or households) other than their owners' household. This includes properties which can be rented only by older people and sheltered accommodation. It includes properties on short- and long-term leases and could include properties owned by people who ordinarily live at a different address (either on or off island).

The Affordable category includes accommodation provided by the States of Guernsey and the Guernsey Housing Association, where the allocation criteria are based primarily on household incomes. In this Report, it has been divided into Social (socially rented) and Intermediate (partially owned) units, which had previously been combined.

Specialised housing covers all units that involve an element of care. This includes all extra care accommodation provided by the States, the Guernsey Housing Association and other housing associations, where the allocation criteria are based primarily on care needs. It includes social rented, partially owned, private rented and owner occupied units, as well as Residential and Nursing homes. Residential and Nursing homes are only included in relation to Specialised housing **(Section 7)**.

The Other category includes self-catering, staff accommodation and units that are known to be vacant.

9.1 Contact details and further information

This bulletin will be published annually each March, but information on property prices is published quarterly in the **Residential Property Prices Bulletin**. You may also be interested in other States of Guernsey Data and Analysis publications, which are all available online at **www.gov.gg/data**. Please contact us for further information.

E-mail: **dataandanalysis@gov.gg**

Telephone: (01481) 717103

For more information
go to **gov.gg/data**