Guernsey Annual Residential Property Stock Bulletin

31st December 2020
Issue date 25th March 2021

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

Contents

1.1 Introduction

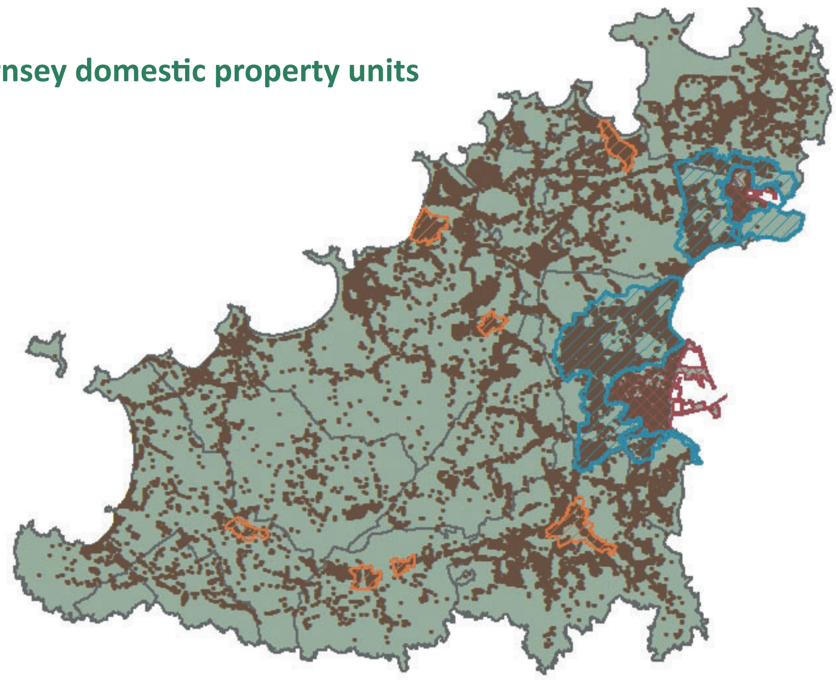
The Guernsey Annual Residential Property Stock Bulletin provides a snapshot of Guernsey's domestic property stock. Data first became available in 2010 and is sourced from several States of Guernsey services. This data is brought together in a system which enables statistical and spatial analysis, provided 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 2020, the total number of domestic property units in Guernsey was 27,206, of which 1,596 (5.9%) were Open Market.
- During 2020, 136 new units were created and 53 units were removed, a net increase of 83 units. Of the net increase of 83, 22 units were Affordable housing.
- 74.8% of all domestic property units were houses or bungalows and 24.2% were apartments.
- Almost a third of all domestic property units (31.6%) had 3 bedrooms.
- 60.6% of the units were owner occupied, 26.9% were privately rented, 8.7% were Affordable social rented units and 0.8% were Affordable intermediate (partially owned) housing units. The remaining 2.9% of units were of other tenure types or vacant.
- 32.9% of all property units were concentrated within St Peter Port. St Peter Port also had the highest density of units, with 1,396 units per square kilometre. This is more than double the density of any other parish (see **Figure 1.2.1**)
- 4.5% of all domestic Local Market property units were conveyed in 2020, compared with 4.0% in 2019.

Figure 1.2.1: Map of Guernsey domestic property units

Main Centre (outer boundary)[1]
Main Centre (inner area)[1]
Local Centre[1]



[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.**

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

At the end of December 2020, there were 27,206 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 number of domestic property units since 2015. At the end of 2020, there were 67 (0.2%) more domestic property units than at the end of 2019. There was a net change of minus 16 administrative amendments in 2020. 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. During 2019, new information on the number of property units became available through the introduction of the new waste scheme. The figures presented in the previous edition of this bulletin were restated to reflect this and therefore there are no administrative amendements prior to 2020.

Of the 27,206 domestic property units, 94.1% were Local Market units and the remaining 5.9% were on the Open Market. The number of Local Market domestic property units has increased by 0.3% since 2019 and by 2.2% (543 units) since 2015 (see **Table 2.1.2** and **Figure 2.1.1**).

The number of Open Market domestic property units has decreased by 0.4% since 2019, taking the total number of domestic units to 1,596 (see **Table 2.1.2** and **Figure 2.1.2**). During 2018 and 2019 a number of inscriptions previously allocated to demolished or deregistered dwellings were used to inscribe replacement dwellings which restored the total number to the amount seen in 2015.

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

Table 2.1.1: Total number of units

Year	Total no. units	Net change	Administrative amendments	Annual % change in total
2015	26,667	-	0	-
2016	26,710	43	0	0.2%
2017	26,800	90	0	0.3%
2018	27,029	229	0	0.9%
2019	27,139	110	0	0.4%
2020	27,206	83	-16	0.2%

Table 2.1.2: Number of units by Market

Year	Total no. Local Market units	Annual % change in total Local Market units	Total no. Open Market units	Annual % change in total Open Market units
2015	25,067	-	1,600	-
2016	25,119	0.2%	1,591	-0.6%
2017	25,215	0.4%	1,585	-0.4%
2018	25,432	0.9%	1,597	0.8%
2019	25,537	0.4%	1,602	0.3%
2020	25,610	0.3%	1,596	-0.4%

Figure 2.1.1: Total Local Market units

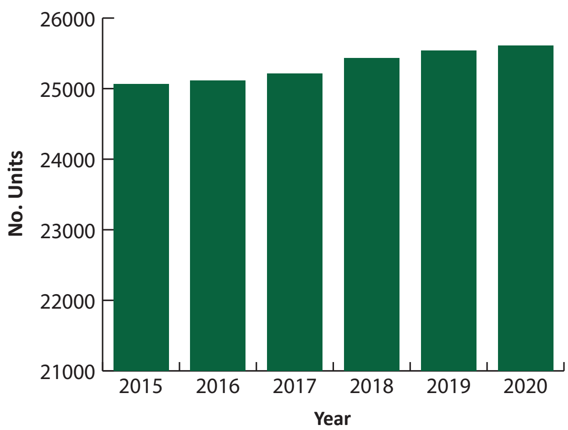
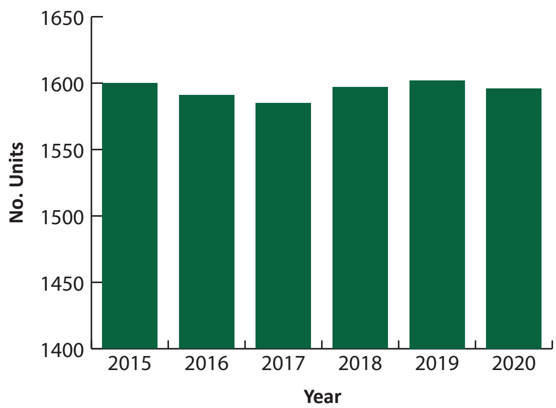


Figure 2.1.2: Total Open Market units



2.2 Domestic property units - market and type

Table 2.2.1: Number of units by type and Market

Type	2020					
	No. units			% of units		
	Local	Open	Total	Local	Open	Total
Apartment	6,406	170	6,576	25.0	10.7	24.2
Bungalow	9,827	350	10,177	38.4	21.9	37.4
House	9,123	1,056	10,179	35.6	66.2	37.4
Other	254	20	274	1.0	1.3	1.0
Total	25,610	1,596	27,206	100.0	100.0	100.0

Figure 2.2.1: Local Market units by type at 31st December 2020

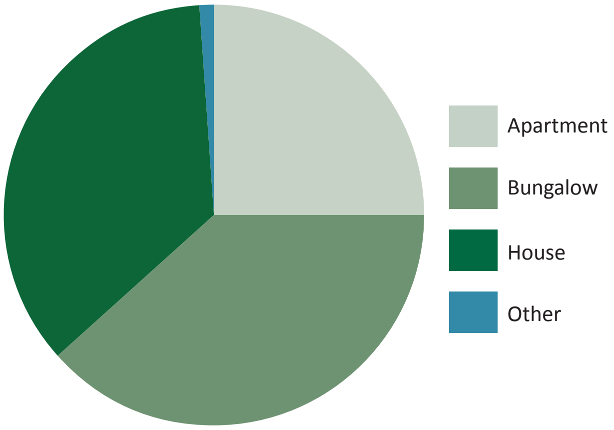
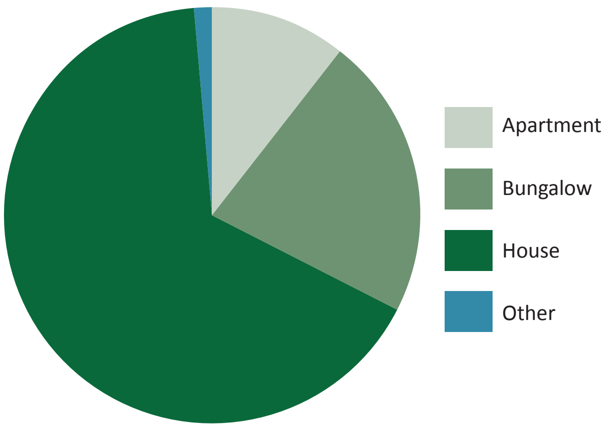


Figure 2.2.2: Open Market units by type at 31st December 2020



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

Please see **page 31** 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.

In 2020, bungalows and houses accounted for the largest proportion of domestic property units (Local and Open Market combined), both comprising 37.4% of the total respectively. 24.2% 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** show the proportion of unit types that comprise the Local and Open Markets respectively. As can be seen, houses made up a larger proportion of Open Market domestic property units (66.2%), compared to Local Market units (35.6%). 38.4% of Local Market units were bungalows and 25.0% were apartments. This compares to 21.9% and 10.7% of Open Market units respectively.

More information on the number of people living in each Market can be found in the latest **Annual Electronic Census Report**, available at **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. 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 local IT company Cortex Technologies Limited, increasing the accuracy of bedroom information collected from Estate Agents' websites. Bedroom data is currently unavailable for 8.4% of the island's domestic property units, compared to 9.1% in 2016.

At the end of December 2020, the highest proportion (31.6%) 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 31.8% and 27.1% respectively.

17.0% of Local Market units had one bedroom, compared to 3.8% of Open Market units at the end of December 2020. 21.1% of Open Market units had more than 4 bedrooms, compared with just 4.6% 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.

Overall, the distribution of units by number of bedrooms in both the Local and Open Market has remained relatively stable since 2015 (see **Table 2.3.2** and **Table 2.3.3**). Proportionally, the amount of units with over four bedrooms has increased the most since 2015 in both the Local and Open Market (with increases of 14% and 15% respectively). In the Local Market, the greatest numerical increase since 2015 was seen in four bedroom units (an increase of 234 units) whilst units with over four bedrooms saw the largest numerical increase in the Open Market during the same time period (45 units). These increases may be partly due to a greater coverage of bedroom information in 2020 compared to 2015.

Table 2.3.1: Number of bedrooms per unit by Market

No. bedrooms	2020					
	No. units			% of units		
	Local	Open	Total	Local	Open	Total
1	4,350	60	4,410	17.0	3.8	16.2
2	6,821	182	7,003	26.6	11.4	25.7
3	8,152	433	8,585	31.8	27.1	31.6
4	2,999	425	3,424	11.7	26.6	12.6
Over 4	1,166	337	1,503	4.6	21.1	5.5
Unknown	2,122	159	2,281	8.3	10.0	8.4
Total	25,610	1,596	27,206	100.0	100.0	100.0

Figure 2.3.1: Proportion of bedrooms per unit by Market at 31st December 2020

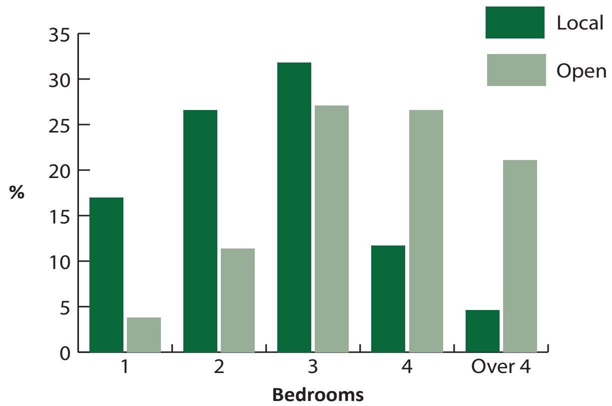


Table 2.3.2: Number of bedrooms per Local Market unit

	No. bedrooms						
	1	2	3	4	Over 4	Unknown	Total
2015	4,193	6,672	8,136	2,765	1,019	2,282	25,067
2016	4,165	6,694	8,108	2,814	1,078	2,260	25,119
2017	4,224	6,753	8,147	2,843	1,093	2,155	25,215
2018	4,277	6,808	8,172	2,899	1,123	2,153	25,432
2019	4,314	6,794	8,155	2,942	1,149	2,183	25,537
2020	4,350	6,821	8,152	2,999	1,166	2,122	25,610

Table 2.3.3: Number of bedrooms per Open Market unit

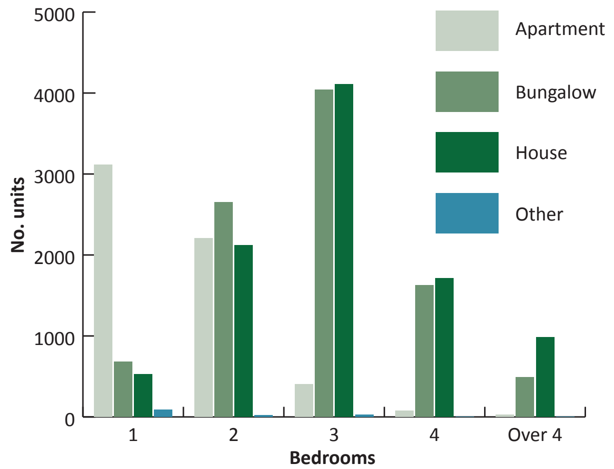
	No. bedrooms						
	1	2	3	4	Over 4	Unknown	Total
2015	59	174	475	415	292	185	1,600
2016	56	173	464	420	304	174	1,591
2017	60	180	474	406	297	168	1,585
2018	61	186	452	415	314	169	1,597
2019	57	178	441	426	329	171	1,602
2020	60	182	433	425	337	159	1,596

2.4 Domestic property units - type and bedrooms

Table 2.4.1: Number of units by type, number of bedrooms per unit and Market

Type	No. bedrooms	2020			
		Local	Open	Total	% of total units
Apartment	1	3,091	22	3,113	11.4
	2	2,140	70	2,210	8.1
	3	368	36	404	1.5
	4	64	11	75	0.3
	Over 4	21	5	26	0.1
	Unknown	722	26	748	2.7
	Total	6,406	170	6,576	24.2
Bungalow	1	672	8	680	2.5
	2	2,604	47	2,651	9.7
	3	3,899	141	4,040	14.8
	4	1,535	95	1,630	6.0
	Over 4	450	40	490	1.8
	Unknown	667	19	686	2.5
	Total	9,827	350	10,177	37.4
House	1	497	29	526	1.9
	2	2,059	63	2,122	7.8
	3	3,857	255	4,112	15.1
	4	1,396	317	1,713	6.3
	Over 4	693	292	985	3.6
	Unknown	621	100	721	2.7
	Total	9,123	1,056	10,179	37.4
Other	1	90	1	91	0.3
	2	18	2	20	0.1
	3	28	1	29	0.1
	4	4	2	6	0.0
	Over 4	2	-	2	0.0
	Unknown	112	14	126	0.5
	Total	254	20	274	1.0

Figure 2.4.1: Number of units by number of bedrooms and type at 31st December 2020



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 2020, three bedroom houses and three bedroom bungalows made up the largest proportions of the total units (15.1% and 14.8% 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 11.4% and 9.7% of the total respectively).

Two bedroom apartments accounted for 8.1% of the total whilst two bedroom houses made up 7.8% of the total number of units.

Please see **page 31** for more information on property types.

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 73.5% 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 2020, the largest proportion of Local Market domestic property units fell into the 101 to 150 TRP units band (29.9%). By comparison, the modal band for Open Market domestic property units was 251 to 300 TRP units (16.2%).

20.1% of Open Market domestic property units had a TRP of over 500 units, compared with just 1.2% of Local Market domestic property units. Open Market property units tend to be, in general, larger than those in the Local Market.

The overall TRP distributions presented 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	2020		
	% 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	1.0	19.0
101 to 150	29.9	2.4	27.9
151 to 200	22.8	9.9	21.9
201 to 250	11.8	14.0	12.0
251 to 300	5.7	16.2	6.5
301 to 350	3.2	12.8	3.9
351 to 400	1.8	8.5	2.2
401 to 450	1.1	7.8	1.5
451 to 500	0.6	6.8	1.0
501 to 550	0.5	3.9	0.7
551 to 600	0.3	2.7	0.4
601 to 650	0.1	2.9	0.3
651 to 700	0.1	2.4	0.3
701 to 750	0.1	2.0	0.2
751 to 800	0.1	1.8	0.2
801 to 850	<0.1	0.8	0.1
851 to 900	<0.1	0.9	0.1
901 to 950	<0.1	0.8	0.1
951 to 1000	<0.1	0.2	<0.1
Over 1000	<0.1	1.9	0.2
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 at 31st December 2020

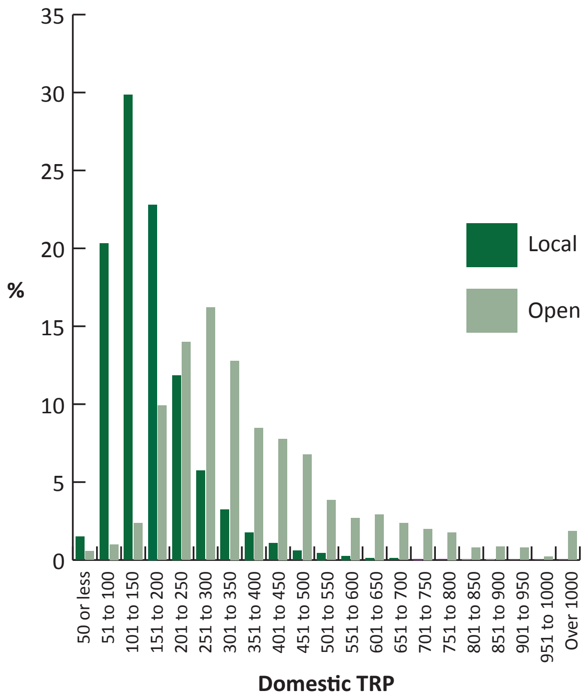


Table 2.6.1: Overall median TRP for all units

Year	Overall median TRP for all domestic property units
2015	154
2016	154
2017	154
2018	154
2019	154
2020	155

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

Type	No. bedrooms	2020
		Median TRP
Apartment	1	65
	2	86
	3	125
	4	155
	Over 4	126
Bungalow	1	103
	2	136
	3	164
	4	202
	Over 4	250
House	1	114
	2	115
	3	155
	4	232
	Over 4	336
Overall median for all domestic property units		155

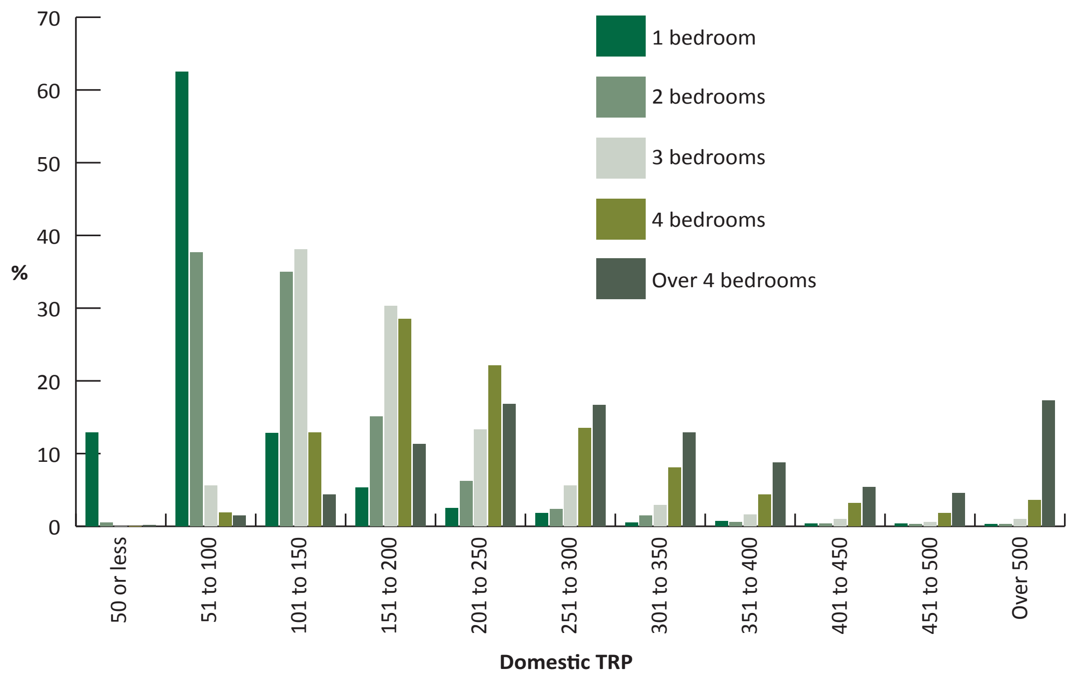
As mentioned on **page 8**, the number of domestic TRP units represent a measure of the size (based on square metres of floor area) of a domestic property unit, excluding land.

The overall median TRP per property unit was 155 at the end of December 2020. As shown in **Table 2.6.1**, the overall median has increased for the first time since 2015.

As expected, the number of TRP units generally increases as the number of bedrooms increases and tends to be higher for houses and bungalows than apartments (see **Table 2.6.2**).

Figure 2.6.1 shows the distribution of TRP values for domestic property units split by number of bedrooms. 62.5% of one bedroom units are concentrated within the 51 to 100 TRP units band. The distribution of units with more than one bedroom is broader. The largest concentration of TRP units for properties with over four bedrooms is within the 201-250 TRP units band (16.8%). 17.3% of properties with more than 4 bedrooms had a TRP over 500.

Figure 2.6.1: Domestic TRP distribution by number of bedrooms at 31st December 2020



2.7 Domestic property units - tenure

The tenure of domestic property units presented in this bulletin can be ascertained from Cadastre ownership information (please see **page 32** for more information on tenure.) The Affordable category is divided into "Social" (social rented) and "Intermediate" (partially owned) units. In bulletins prior to 2017, these categories were combined. The "Other" category includes staff accommodation, self-catering units and properties that are known to be vacant. More information on vacant units is provided on **page 28**.

At the end of 2020, 16,474 (60.6%) of the domestic property units in Guernsey were owner occupied (see **Table 2.7.1**). There were 7,328 (26.9%) privately rented domestic units. Affordable social and Affordable intermediate units accounted for 8.7% and 0.8% of the total respectively. The remaining 800 units (2.9%) had other tenure types.

Of the 27,206 domestic property units, 1.4% were specifically for people over the age of 55.

At the end of December 2020, 177 property units were specifically used to house key workers, 74.0% of which are categorised as staff accommodation within the "other" category in this report. The remaining 26.0% are categorised as privately rented or Affordable housing.

The proportions by tenure differ between the Local and Open Market (see **Figure 2.7.1** and **Figure 2.7.2**). **Table 2.7.2** and **Table 2.7.3** show how these have changed over the last six years.

More information on the number of people living in each tenure can be found in the **Annual Electronic Census Report** available at **www.gov.gg/population**. For information on household incomes by tenure see **www.gov.gg/household**.

Table 2.7.1: Number of units by tenure and Market

Tenure		2020					
		No. units			% of total units		
		Local	Open	Total	Local	Open	Total
Private Market	Owner occupied	15,426	1,048	16,474	60.2	65.7	60.6
	Rented	6,812	516	7,328	26.6	32.3	26.9
Affordable Market	Social	2,378	0	2,378	9.3	0.0	8.7
	Intermediate	226	0	226	0.9	0.0	0.8
	Other	768	32	800	3.0	2.0	2.9
	Total	25,610	1,596	27,206	100.0	100.0	100.0

Figure 2.7.1: Local Market units by tenure

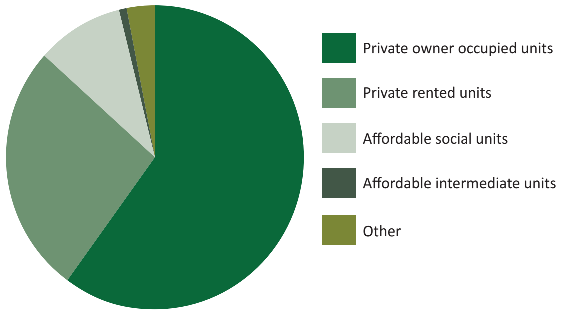


Figure 2.7.2: Open Market units by tenure

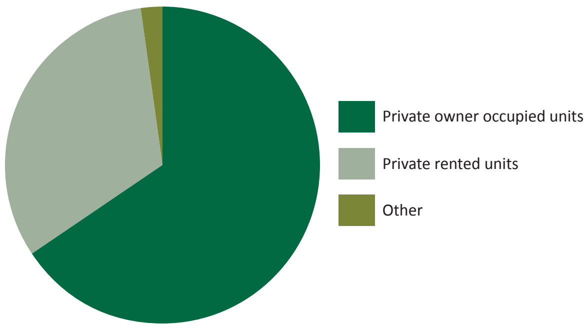


Table 2.7.2: Local Market units by tenure

	Private Market		Affordable Market		Other
	Owner occupied	Rented	Social	Intermediate	
2015	15,115	6,745	2,273	142	792
2016	15,065	6,881	2,292	154	727
2017	15,138	6,846	2,331	169	731
2018	15,179	6,968	2,346	200	739
2019	15,290	6,877	2,364	217	789
2020	15,426	6,812	2,378	226	768

Table 2.7.3: Open Market units by tenure

	Private Market		Affordable Market		Other
	Owner occupied	Rented	Social	Intermediate	
2015	1,002	566	0	0	32
2016	996	568	0	0	27
2017	989	567	0	0	29
2018	1,002	562	0	0	33
2019	1,018	548	0	0	36
2020	1,048	516	0	0	32

Table 2.8.1: Number and density of units by location

Parish			2020
	No. units	% of total units	No. units per km²
Castel	3,514	12.9	345
Forest	635	2.3	155
St Andrew	933	3.4	207
St Martin	2,759	10.1	377
St Peter Port	8,956	32.9	1,396
St Pierre du Bois	885	3.3	139
St Sampson	3,967	14.6	634
St Saviour	1,149	4.2	180
Torteval	406	1.5	131
Vale	4,002	14.7	448
Local Centres	1,404	5.2	1,368
Main Centre	10,996	40.4	1,857
Outside of the Centres	14,806	54.4	268
Total and overall density	27,206	100.0	428

Figure 2.8.1: Density of units by parish

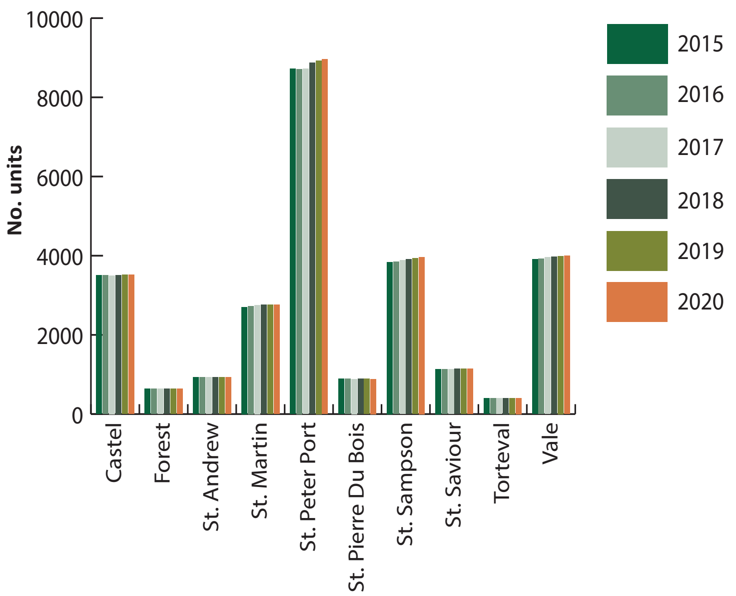


Table 2.8.2: Number of units by parish

Parish	2015	2016	2017	2018	2019	2020
Castel	3,504	3,506	3,498	3,513	3,515	3,514
Forest	638	638	638	638	636	635
St Andrew	926	926	928	928	929	933
St Martin	2,704	2,729	2,754	2,760	2,761	2,759
St Peter Port	8,718	8,715	8,719	8,869	8,930	8,956
St Pierre du Bois	889	889	885	888	889	885
St Sampson	3,839	3,850	3,880	3,912	3,933	3,967
St Saviour	1,139	1,136	1,136	1,140	1,148	1,149
Torteval	404	402	402	406	406	406
Vale	3,906	3,919	3,960	3,975	3,992	4,002
Total	26,667	26,710	26,800	27,029	27,139	27,206

The information on property units can also be mapped spatially.

At the end of December 2020, 32.9% of all property units (8,956 of the total 27,206) were concentrated within the parish of St Peter Port (see **Table 2.8.1** and **Figure 2.8.1**). Torteval, the smallest parish by area, contained the smallest number of property units, at 406 (1.5%).

St Peter Port had the highest density of units, with 1,396 units per square kilometre. 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 Sampson showed the largest increase in the number of units (34) since 2019 (see **Table 2.8.2**) whilst St Peter Port showed the largest increase in units since 2015.

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% each) and lowest in St Sampson where only 1.4% of the units were Open Market.

Figures 2.8.2 and **2.8.3** on **page 12** show the distribution of Local and Open Market units spatially. 53.4% of all Open Market units in the island are situated in St Peter Port, in comparison to 31.6% 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 2020, 40.4% of all units were located within the Main Centre, 5.2% in the Local Centres and 54.4% Outside of the Centres (see **Table 2.8.1** on **page 11**).

More information on the location of units that were created or removed in 2020 is provided on **pages 23-25**.

Table 2.8.3: Location of units by Market

Location	2020					
	No. units			% of parish total units		
	Local	Open	Total	Local	Open	Total
Castel	3,386	128	3,514	96.4	3.6	100.0
Forest	604	31	635	95.1	4.9	100.0
St Andrew	880	53	933	94.3	5.7	100.0
St Martin	2,498	261	2,759	90.5	9.5	100.0
St Peter Port	8,104	852	8,956	90.5	9.5	100.0
St Pierre du Bois	831	54	885	93.9	6.1	100.0
St Sampson	3,910	57	3,967	98.6	1.4	100.0
St Saviour	1,086	63	1,149	94.5	5.5	100.0
Torteval	386	20	406	95.1	4.9	100.0
Vale	3,925	77	4,002	98.1	1.9	100.0
Local Centres	1,369	35	1,404	97.5	2.5	100.0
Main Centre	10,335	661	10,996	94.0	6.0	100.0
Outside of the Centres	13,906	900	14,806	93.9	6.1	100.0
Total	25,610	1,596	27,206	94.1	5.9	100.0

Figure 2.8.2: Map of Local Market units

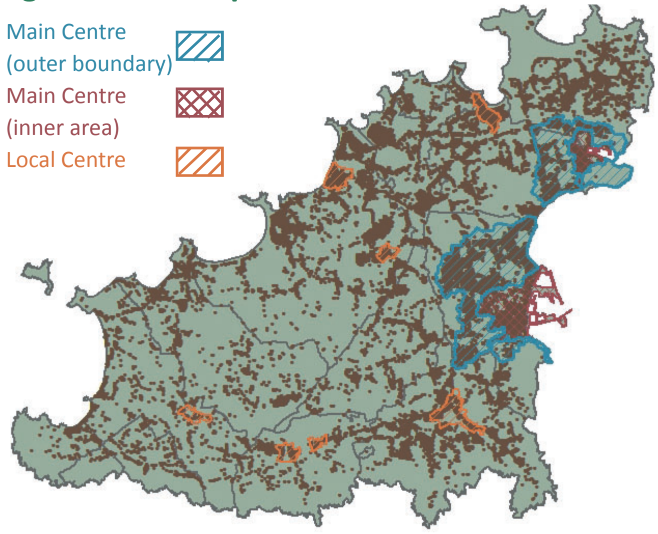
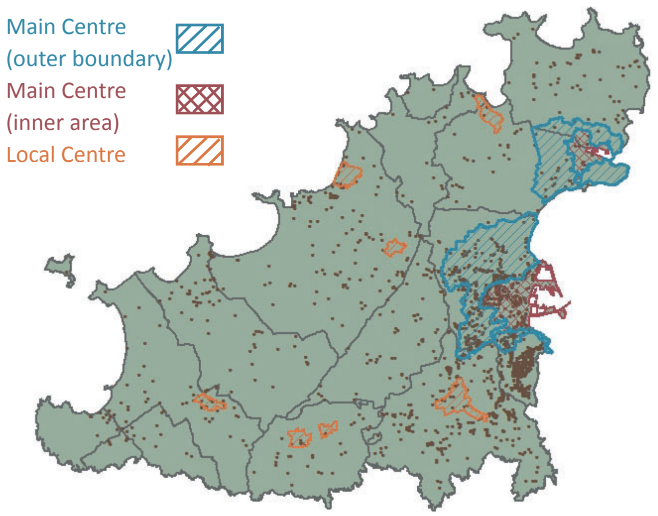


Figure 2.8.3: Map of Open Market units



2.9 Domestic property units - location and bedrooms

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

Location	2020					
	% of parish total units by no. bedrooms					
	1	2	3	4	Over 4	Unknown
Castel	10.8	19.4	42.9	13.7	5.4	7.8
Forest	6.3	20.8	37.2	14.8	6.0	15.0
St Andrew	5.8	19.9	36.8	17.6	11.1	8.8
St Martin	13.7	22.6	32.4	14.7	7.1	9.6
St Peter Port	25.0	30.4	22.3	9.4	4.6	8.2
St Pierre du Bois	8.4	20.7	29.7	16.9	10.7	13.6
St Sampson	17.6	28.3	33.5	10.5	3.3	6.8
St Saviour	7.1	21.8	34.9	17.1	7.1	11.9
Torteval	7.9	21.9	28.3	20.2	10.3	11.3
Vale	10.8	25.2	37.5	14.7	5.4	6.3
Local Centres	18.1	28.4	30.1	9.9	3.3	10.3
Main Centre	25.3	31.0	23.4	8.4	3.8	8.1
Outside of the Centres	9.3	21.6	37.7	16.0	7.0	8.4
Total	16.2	25.7	31.6	12.6	5.5	8.4

Figure 2.9.1: Proportion of units by number of bedrooms and location at 31st December 2020

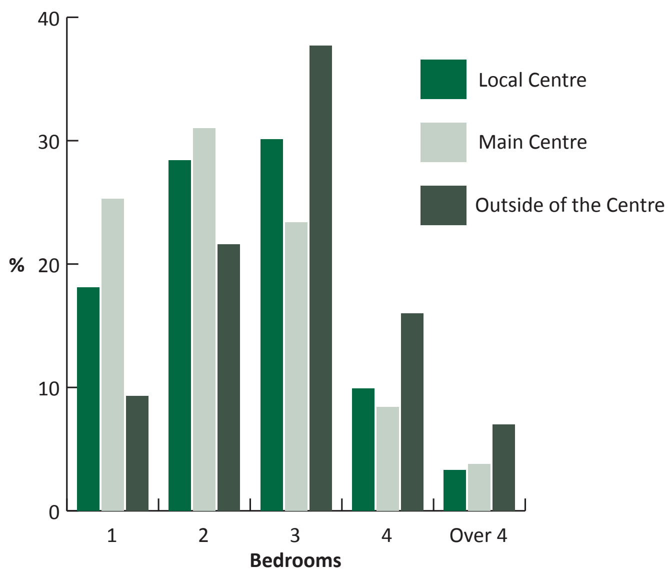


Table 2.9.1 shows the distribution of domestic property units by parish and number of bedrooms.

Over half (57.3%) of all domestic property units had two or three bedrooms at the end of December 2020, whilst only 5.5% had more than four bedrooms.

Three bedroom units made up the greatest proportion of all property units in every parish except St Peter Port, where there was a greater proportion of one and two bedroom property units than three bedroom units (25.0% and 30.4% versus 22.3% respectively).

It can be seen from **Figure 2.9.1** that Local and Main Centres tended to have more one and two bedroom property units (46.5% and 56.3% respectively) than Outside of the Centres (30.9%). The Main Centre had more than double the concentration of one bedroom property units than Outside of the Centres (25.3% compared with 9.3%) as at 31st December 2020.

Property units Outside of the Centres had a higher proportion with three or more bedrooms than those in the Local and Main Centres (**see Figure 2.9.1**).

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

Table 2.10.1 compares the median number of domestic Tax on Real Property (TRP) units (i.e size of units) by Centre, type and number of bedrooms. Please note that there are a small number of Local Centre units within each category.

The overall median number of domestic TRP units in 2020 was 155 (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 than those in Local and Main centres. For example, the median three bedroom house Outside of the Centres was larger by 17 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 2020.

Overall, the median domestic TRP units Outside of the Centres was 54 units higher than in the Main Centre and 33 units higher than in the Local Centres at the end of December 2020.

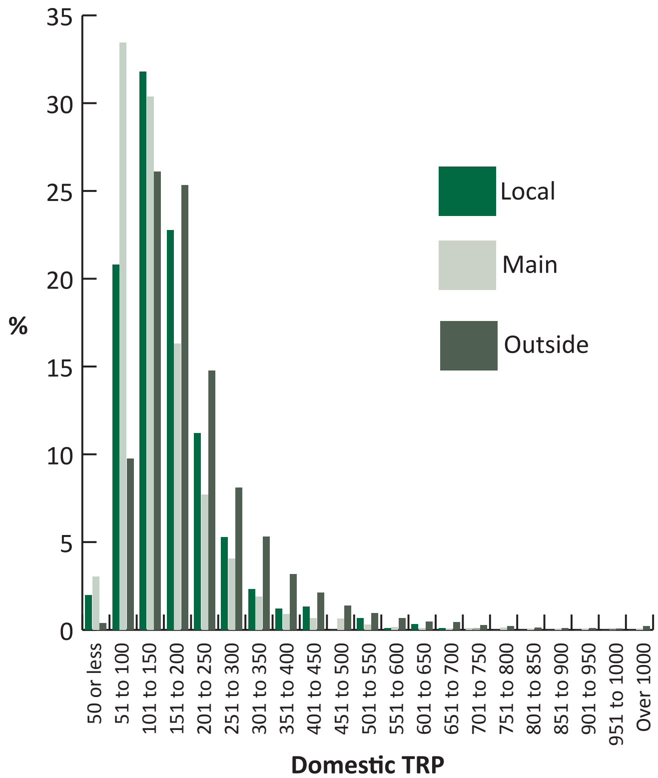
The TRP distributions in Figure 2.10.1 illustrate that 63.8% of Main Centre units fell into the 51 to 150 TRP unit bands, compared to 52.6% of Local Market units and 35.9% of units Outside of the Centres. A greater proportion of units Outside of the Centre fell into the 151 to 250 bands (40.1%) than in the Local and Main Centre (34.0% and 24.0% respectively).

3.6% of property units Outside of the Centres had a TRP of over 500, compared to 1.3% of Local Centre units and 1.0% of units in the Main Centre.

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

Type	No. bedrooms	2020		
		Median TRP of Local Centre units	Median TRP of Main Centre units	Median TRP of units Outside of the Centres
Apartment	1	76	64	71
	2	84	85	96
	3	125	125	115
	4	239	165	113
	Over 4	0	209	87
Bungalow	1	73	78	116
	2	118	118	142
	3	160	141	169
	4	187	162	206
	Over 4	194	214	260
House	1	125	105	140
	2	106	107	141
	3	151	143	168
	4	216	202	268
	Over 4	316	275	376
All	1	78	69	94
	2	110	99	137
	3	154	142	168
	4	202	195	226
	Over 4	306	269	316
Overall median for all units		143	122	176

Figure 2.10.1: Domestic TRP distribution by location at 31st December 2020



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

Table 3.1.1: Proportion of Local Market units by type, number of bedrooms and tenure (%)

Type	No. bedrooms	2020				
		Private Market		Affordable Market		
		Owner occupied	Rented	Social	Intermediate	Other
Apartment	1	15.9	60.3	18.3	2.3	3.1
	2	28.5	56.1	10.6	1.2	3.7
	3	29.9	51.4	11.4	1.4	6.0
	4	18.8	76.6	1.6	0.0	3.1
	Over 4	9.5	85.7	0.0	0.0	4.8
	Unknown	13.6	74.9	0.8	0.0	10.7
	Total	20.6	60.3	13.1	1.6	4.3
Bungalow	1	50.3	23.7	22.3	0.6	3.1
	2	79.0	16.8	2.5	0.0	1.8
	3	86.8	12.0	0.7	0.0	0.5
	4	88.8	10.9	0.0	0.0	0.3
	Over 4	89.3	9.8	0.0	0.0	0.9
	Unknown	65.2	27.7	0.1	0.0	6.9
	Total	81.2	14.9	2.5	0.1	1.4
House	1	45.7	17.5	27.0	2.6	7.2
	2	61.3	19.3	14.7	2.8	1.9
	3	65.7	12.0	20.6	1.0	0.6
	4	81.9	13.9	3.4	0.4	0.3
	Over 4	84.3	13.6	0.0	0.0	2.2
	Unknown	56.8	35.3	0.5	0.0	7.4
	Total	66.9	15.9	14.1	1.3	1.8
Other	1	1.1	6.7	8.9	0.0	83.3
	2	33.3	44.4	0.0	0.0	22.2
	3	35.7	21.4	3.6	7.1	32.1
	4	50.0	25.0	0.0	0.0	25.0
	Over 4	0.0	50.0	0.0	0.0	50.0
	Unknown	2.7	11.6	1.8	0.0	83.9
	Total	8.7	13.8	4.3	0.8	72.4
Total	1	24.3	48.6	19.7	2.0	5.3
	2	57.7	30.0	8.7	1.2	2.5
	3	74.1	13.8	10.6	0.6	0.9
	4	84.1	13.7	1.6	0.2	0.4
	Over 4	84.7	13.5	0.0	0.0	1.8
	Unknown	41.9	45.1	0.6	0.0	12.4
	Total	60.2	26.6	9.3	0.9	3.0

Section 3 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 2020. Please refer to **page 32** for more information about tenure group classifications.

In total, 60.3% of Local Market apartments were privately rented, compared with 14.9% of bungalows and 15.9% of houses.

Affordable Social and Intermediate units together comprised 15.3% of houses, 2.5% of bungalows and 14.8% of apartments in the Local Market.

For comparison with the Open Market see **Table 4.1.1** on **page 19**.

See **Table 2.7.2** on **page 10** for the number of Local Market units by tenure each year since 2015. For the number of Local Market units by type and number of bedrooms, please refer to **Table 2.4.1** on **page 7**.

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

The number of Local Market owner occupied, privately rented, Affordable social rented and Affordable intermediate (partially owned) units by type and number of bedrooms are shown in **Figures 3.1.1**, **3.1.2**, **3.1.3** and **3.1.4** respectively.

At the end of December 2020, the distributions were significantly different between each of the tenures. Owner occupied units were predominantly made up of 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 (see **Figure 3.1.1**).

Figure 3.1.2 shows that 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 (see **Figure 3.1.3**). One bedroom apartments accounted for the largest proportion of Affordable intermediate units, followed by two bedroom houses (see **Figure 3.1.4**).

Figure 3.1.1: Number of Local Market owner occupied units by type and number of bedrooms at 31st December 2020

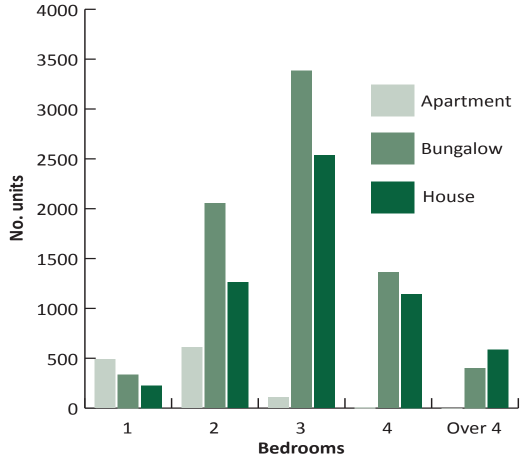


Figure 3.1.2: Number of Local Market rented units by type and number of bedrooms at 31st December 2020

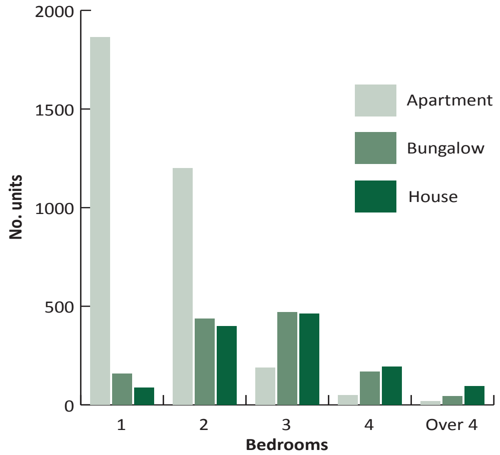


Figure 3.1.3: Number of Local Market Affordable social units by type and number of bedrooms at 31st December 2020

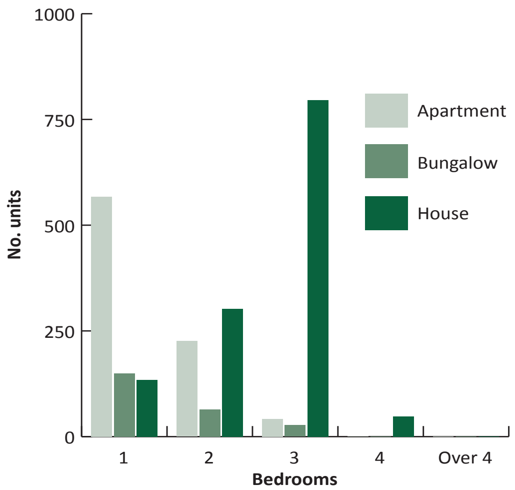


Figure 3.1.4: Number of Local Market Affordable intermediate units by type and number of bedrooms at 31st December 2020

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	2020	
		Median TRP of Local Market owner occupied units	Median TRP of Local Market rented units
Apartment	1	66	65
	2	86	86
	3	117	123
	4	141	99
	Over 4	124	80
Bungalow	1	111	76
	2	138	114
	3	165	147
	4	200	176
	Over 4	244	270
House	1	114	85
	2	117	104
	3	151	145
	4	212	215
	Over 4	293	283
All	1	80	67
	2	121	98
	3	158	144
	4	204	198
	Over 4	273	279
Overall median for all units		157	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
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	274	156
2019	79	121	158	204	274	157
2020	80	121	158	204	273	157

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
2015	69	98	142	196	276	114
2016	68	98	143	193	276	113
2017	69	99	143	195	281	112
2018	68	98	143	196	264	111
2019	68	98	144	199	260	111
2020	67	98	144	198	279	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 2020, the overall median number of domestic TRP units for Local Market owner occupied units was 157 which was the same as at the end of 2019 and two units more than at the end of 2015. This compares to a median TRP of 111 for rental units, which was the same as 2019 and three units less than at the end of 2015.

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 the last six years. The median TRP of owner occupied domestic property units with two, three or four bedrooms remained the same as 2019. The median TRP of property units with one bedroom increased by one TRP unit and the median of those with more than four bedrooms decreased by one unit (see **Table 3.2.2**).

As shown in **Table 3.2.3**, the median TRP of two and three bedroom privately rented domestic property units did not change between 2019 and 2020. There were decreases in the size of domestic properties with one or four bedrooms, with their median TRP decreasing by one unit each, since 2019. There was an increase of eleven TRP units in the median TRP of rented properties with over four bedrooms compared to 2019, although it must be noted that there is a smaller number of proprties within this category.

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 to 3.3.4. For the purposes of this bulletin, 'Main Centre' refers to the outer and inner areas of the Main Centre combined.

In 2020, St Peter Port had the highest proportion (40.1%) 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 (13.5%).

There was a higher concentration of Affordable housing units in the Local and Main Centres (18.9% and 12.3% respectively) compared with Outside of the Centres (7.7%). In the Main Centre, 46.9% of domestic property units were owner occupied, compared with 54.5% in the Local Centres and 70.7% Outside of the Centres.

Table 3.3.1: Tenure of Local Market units by location

Location					2020
	Private Market		Affordable Market		
	Owner occupied	Rented	Social	Intermediate	Other
Castel	65.9	19.5	11.4	0.3	2.9
Forest	65.6	21.7	5.6	0.0	7.1
St Andrew	72.3	18.4	6.9	0.0	2.4
St Martin	61.3	17.7	13.5	0.8	6.6
St Peter Port	44.2	40.1	10.5	1.8	3.3
St Pierre du Bois	66.5	25.2	2.2	0.0	6.1
St Sampson	67.2	23.4	7.9	0.8	0.8
St Saviour	68.0	19.9	7.6	0.5	4.1
Torteval	77.2	19.9	0.0	0.0	2.8
Vale	72.1	19.1	7.6	0.3	0.9
Local Centres	54.5	22.1	18.1	0.8	4.5
Main Centre	46.9	38.1	10.8	1.5	2.8
Outside of the Centres	70.7	18.5	7.3	0.4	3.0
Total	60.2	26.6	9.3	0.9	3.0

Figure 3.3.1: Map of Local Market owner occupied units

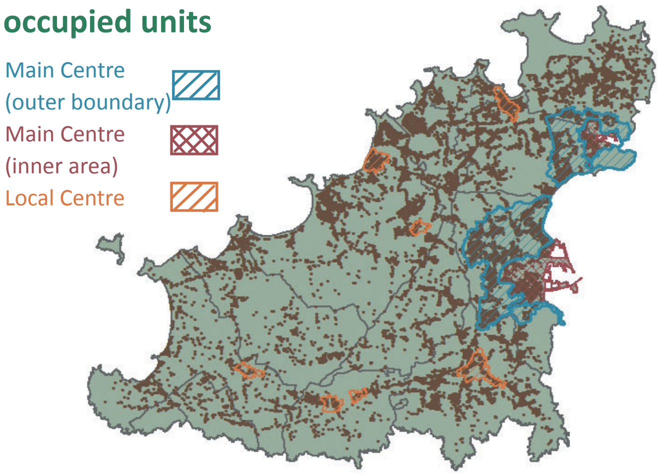


Figure 3.3.2: Map of Local Market privately rented units

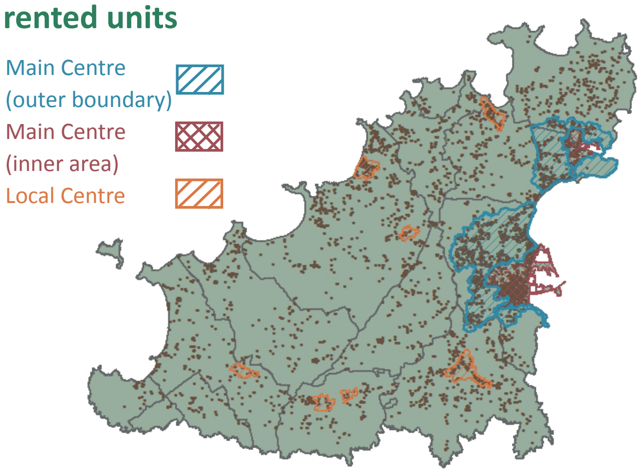


Figure 3.3.3: Map of Local Market Affordable social units

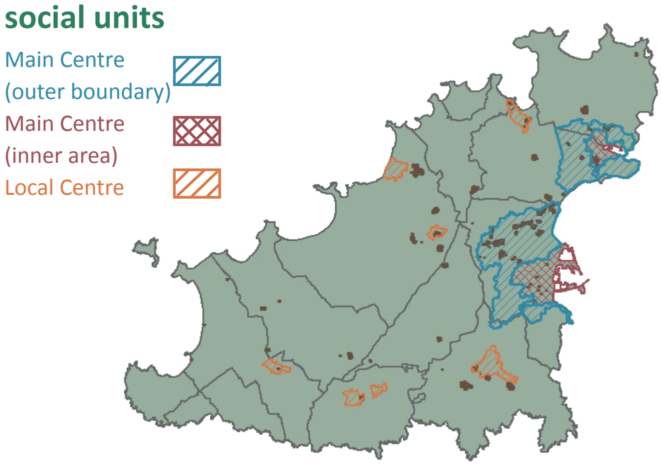
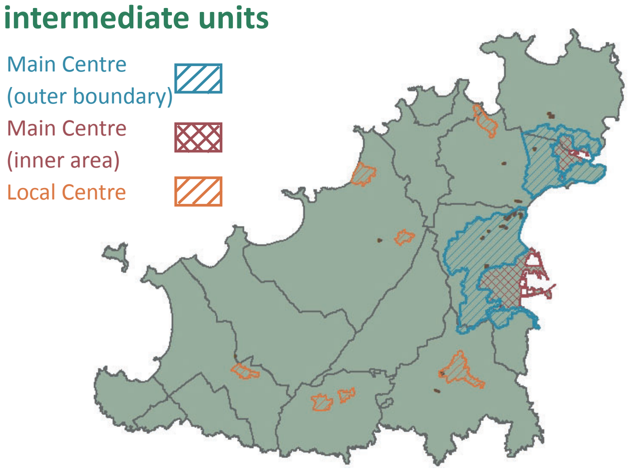


Figure 3.3.4: Map of Local Market Affordable intermediate units



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

Table 4.1.1: Proportion of Open Market units by type, number of bedrooms and tenure (%)

Type	No. bedrooms	2020		
		Private Market		
		Owner occupied	Rented	Other
Apartment	1	13.6	81.8	4.5
	2	32.9	65.7	1.4
	3	44.4	55.6	0.0
	4	9.1	90.9	0.0
	Over 4	0.0	100.0	0.0
	Unknown	23.1	73.1	3.8
	Total	28.8	69.4	1.8
Bungalow	1	50.0	37.5	12.5
	2	76.6	21.3	2.1
	3	73.8	26.2	0.0
	4	73.7	26.3	0.0
	Over 4	77.5	22.5	0.0
	Unknown	63.2	31.6	5.3
	Total	73.4	25.7	0.9
House	1	37.9	62.1	0.0
	2	66.7	30.2	3.2
	3	71.8	27.1	1.2
	4	69.1	30.3	0.6
	Over 4	71.6	27.4	1.0
	Unknown	73.0	25.0	2.0
	Total	69.8	29.1	1.1
Other	1	0.0	0.0	100.0
	2	0.0	0.0	100.0
	3	100.0	0.0	0.0
	4	50.0	50.0	0.0
	Over 4	0.0	0.0	0.0
	Unknown	21.4	0.0	78.6
	Total	25.0	5.0	70.0
Total	1	30.0	65.0	5.0
	2	55.5	41.2	3.3
	3	70.2	29.1	0.7
	4	68.5	31.1	0.5
	Over 4	71.2	27.9	0.9
	Unknown	59.1	31.4	9.4
	Total	65.7	32.3	2.0

Please note that some categories in **Table 4.1.1** contain low numbers of property units, particularly the "other" category.

Section 4 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 of different types of property unit by tenure at the end of December 2020. Please refer to **page 32** for more information about tenure group classifications.

In total, 69.4% of Open Market apartments were privately rented, compared to 25.7% of bungalows and 29.1% of houses.

There was a higher proportion of owner occupied bungalows and houses (73.4% and 69.8% respectively) than apartments (28.8%).

For comparison with the Local Market see **Table 3.1.1** on **page 15**.

See **Table 2.7.3** on **page 10** for the number of Open Market units by tenure each year since 2015. For the number of Open Market units by type and number of bedrooms, please refer to **Table 2.4.1** on **page 7**.

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

The number of Open Market owner occupied and rented units by type and number of bedrooms are shown 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 presented on **page 16**.

In December 2020, the largest proportion of owner occupied and rented Open Market bungalows were those with three bedrooms whist the greatest proportion of both owner occupied and rented houses had four bedrooms. The proportion of owner occupied houses with more than four bedrooms was higher than for rented houses.

Both owner occupied and rented Open Market apartments showed a peak in units with two bedrooms, but the proportion was greater in rented Open Market apartments (see **Figure 4.1.2**).

Figure 4.1.1: Number of Open Market owner occupied units by type and number of bedrooms at 31st December 2020

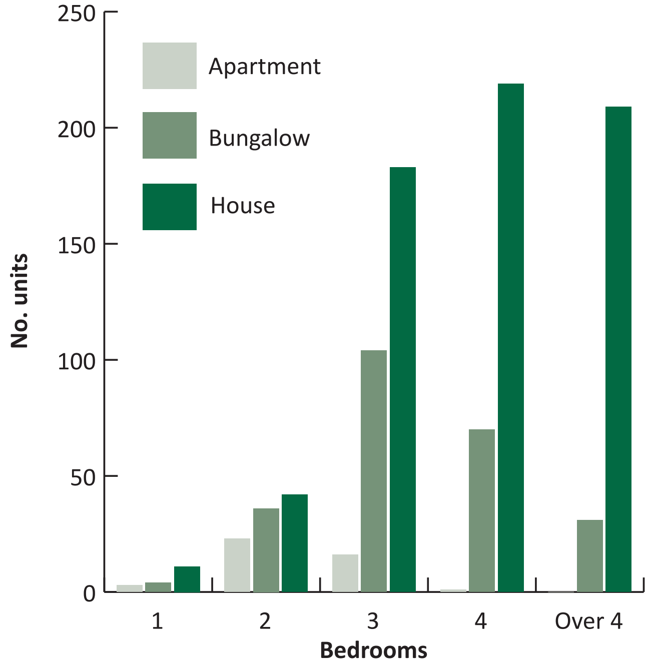
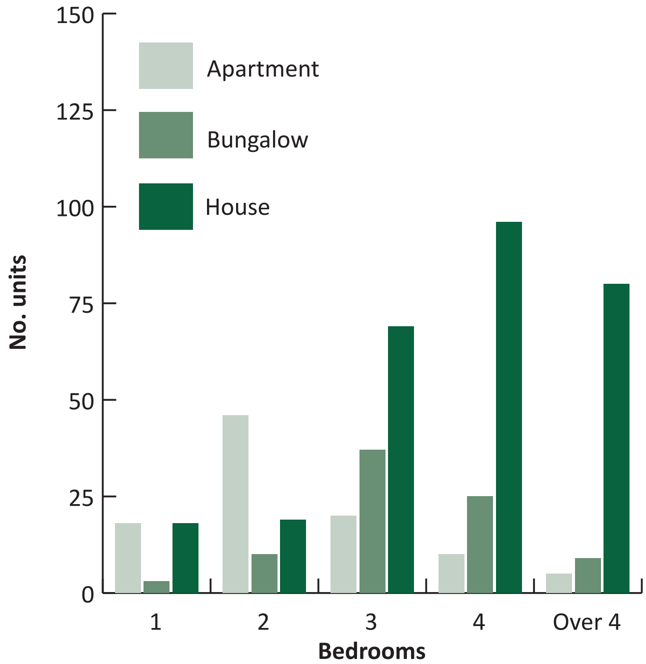


Figure 4.1.2: Number of Open Market rented units by type and number of bedrooms at 31st December 2020



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	2020	
		Median TRP of Open Market owner occupied units	Median TRP of Open Market rented units
Apartment	1	106	43
	2	134	164
	3	174	174
	4	220	255
	Over 4	-	339
Bungalow	1	327	201
	2	273	209
	3	274	271
	4	332	290
	Over 4	407	474
House	1	341	266
	2	320	220
	3	305	263
	4	356	297
	Over 4	473	429
All	1	317	195
	2	250	184
	3	286	263
	4	347	292
	Over 4	458	423
Overall median for all units		341	280

Please note that some categories presented in **Table 4.2.1** contain a low number of property units.

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
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
2019	307	261	290	343	458	344
2020	317	250	286	347	458	341

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
2015	208	214	245	289	435	275
2016	95	212	253	299	422	279
2017	95	214	254	295	422	279
2018	112	198	255	294	422	281
2019	118	196	259	290	410	275
2020	195	184	263	292	423	280

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 2020, the overall median number of domestic TRP units of Open Market owner occupied properties was 341, three TRP units fewer than at the end of December 2019. The median number of TRP units for rented Open Market domestic properties was 280, which was five units higher than a year earlier.

Rented bungalows and houses in the Open Market with 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 the past six years. It must be noted that some categories contain a low number of properties.

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 Pierre du Bois had the highest proportion of owner occupied domestic property units (85.2%), whilst St Peter Port had the lowest (57.7%). Please note that there are a small number of Open Market units in some parishes (see **page 12**).

St Peter Port had the highest proportion of Open Market rented units (40.1%) at the end of December 2020.

As seen in the Local Market, a higher proportion of Open Market properties in the Local Centres and Outside of the Centres were owner occupied (80.0% and 73.1% respectively) compared with the Main Centre (54.8%). In the Main Centre, 42.8% of Open Market property units were rented, compared with 17.1% in the Local Centres and 25.2% Outside of the Centres.

For comparison with the Local Market see **Table 3.3.1** on **page 18**.

Table 4.3.1: Tenure of Open Market units by location

Location	2020		
	% of units		
	Owner occupied	Rented	Other
Castel	78.9	20.3	0.8
Forest	71.0	22.6	6.5
St Andrew	79.2	18.9	1.9
St Martin	73.9	23.8	2.3
St Peter Port	57.7	40.1	2.1
St Pierre du Bois	85.2	13.0	1.9
St Sampson	73.7	24.6	1.8
St Saviour	68.3	31.7	0.0
Torteval	70.0	25.0	5.0
Vale	68.8	29.9	1.3
Local Centres	80.0	17.1	2.9
Main Centre	54.8	42.8	2.4
Outside of the Centres	73.1	25.2	1.7
Total	65.7	32.3	2.0

Figure 4.3.1: Map of Open Market owner occupied units at 31st December 2020

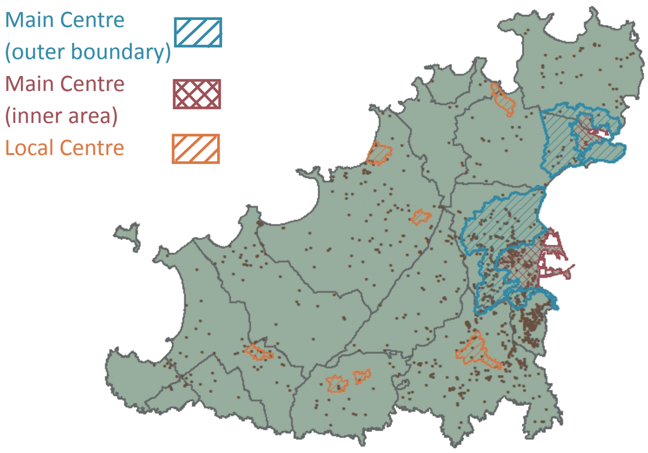
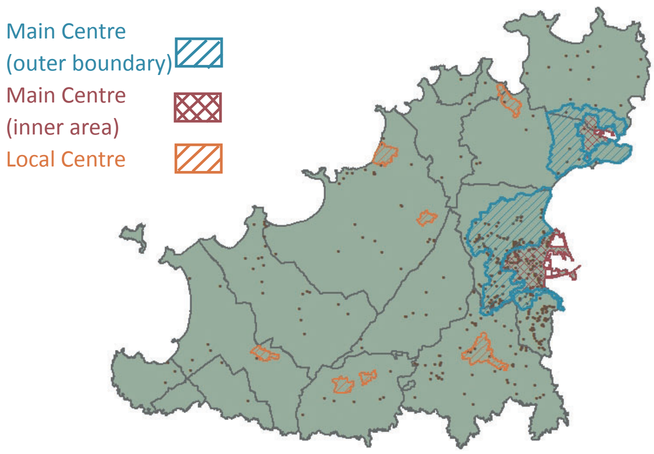


Figure 4.3.2: Map of Open Market rented units at 31st December 2020



5.1 Changes to the number of units

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

Type of change	2020		
	Plus	Minus	Net change
New build	128	0	128
Demolition	0	40	-40
Subdivision	2	0	2
Amalgamation	0	11	-11
Conversion	6	2	4
Total	136	53	83
Administrative amendments	15	31	-16
Total including administrative amendments	151	84	67

Figure 5.1.1: Map of units created in 2020

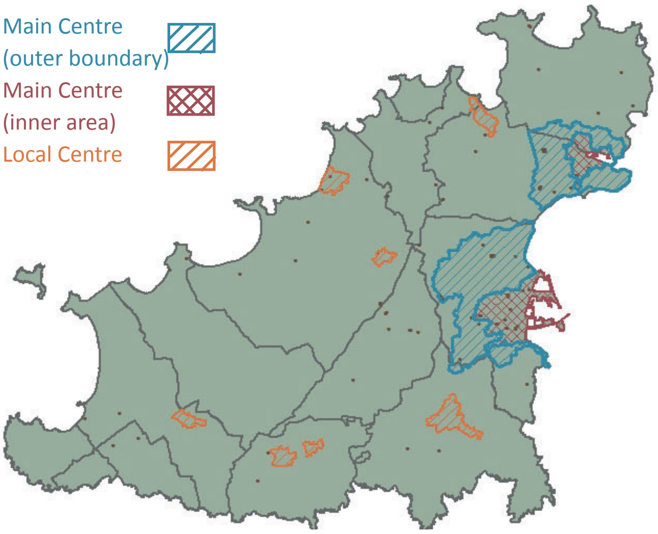
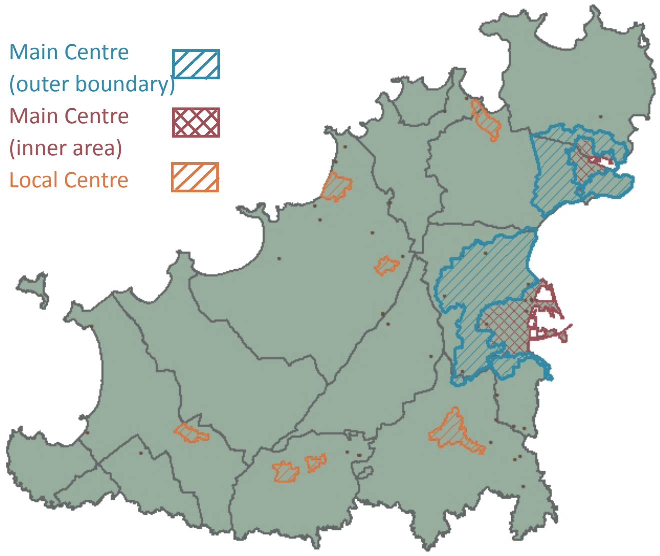


Figure 5.1.2: Map of units removed in 2020*



*Some of the units removed in 2020 are not displayed on the map

Changes to the number of domestic property units can be recorded by the type of change, as shown in **Table 5.1.1**. It must be noted that the Bailiwick of Guernsey went into strict lockdown on 25th March 2020 in order to help slow the spread of COVID-19. Restrictions on all but essential business activities were imposed, including construction sites, and were lifted in phases during April, May and June. Between 20th June 2020 and 22nd January 2021 the only remaining restrictions related to off-Island travel.

In this report, 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 2020. Created units include 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 removed when the building has either been partially or completely removed or the address has been “de-activated” by Guernsey Digimap Services. Removed units include 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 2020.

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.

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

5.1 Changes to the number of units

During 2020, using the definitions on **page 23**, 136 new units were created and 53 were removed; a net change of 83 (see **Table 5.1.1** on **page 23**).

There was a further net decrease of 16 due to administrative amendments at the end of 2020. 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 to **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 (38). The second largest net change in the number of units was in St Sampson with an overall increase of 35 units.

Overall, there was a net change of 4 units in Local Centres, compared to a net change of -1 at the end of 2019 (see **Table 5.1.7** on **page 25**). There was a net change of 78 units in the Main Centre during 2020, and 1 Outside of the Centres, which was 4 units more and 36 units less than during 2019, respectively.

Of the 83 net additional units in 2020, 22 were Affordable housing units and 61 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	2020			
	Net change from new builds and demolitions	Net change from amalgamations and subdivisions	Net change from conversions	Net change total
Castel	1	-1	0	0
Forest	-1	0	1	0
St Andrew	4	-1	0	3
St Martin	-1	-1	0	-2
St Peter Port	34	1	3	38
St Pierre du Bois	-1	-2	0	-3
St Sampson	38	-3	0	35
St Saviour	2	0	0	2
Torteval	0	-1	0	-1
Vale	12	-1	0	11
Total	88	-9	4	83

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

Location	2020			
	Net change from new builds and demolitions	Net change from amalgamations and subdivisions	Net change from conversions	Net change total
Local Centres	6	-2	0	4
Main Centre	74	0	4	78
Outside of the Centres	8	-7	0	1
Total	88	-9	4	83

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

Location	2020			
	Net change from new builds and demolitions	Net change from amalgamations and subdivisions	Net change from conversions	Net change total
Affordable Market	22	0	0	22
Private Market (and other)	66	-9	4	61
Total	88	-9	4	83

*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					
	2015	2016	2017	2018	2019	2020
Plus	185	132	131	284	184	136
Minus	41	89	41	55	74	53
Net Change	144	43	90	229	110	83
Admin amends	0	0	0	0	0	-16
Change in total no. of units	144	43	90	229	110	67

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

Parish	Year					
	2015	2016	2017	2018	2019	2020
Castel	13	-1	20	15	2	0
Forest	6	0	1	0	-2	0
St Andrew	-4	0	2	0	1	3
St Martin	34	24	24	6	1	-2
St Peter Port	63	2	11	150	61	38
St Pierre du Bois	0	0	-5	3	1	-3
St Sampson	15	11	24	32	21	35
St Saviour	4	-3	-1	4	8	2
Torteval	0	-2	0	4	0	-1
Vale	13	12	14	15	17	11
Total	144	43	90	229	110	83

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

Area	Year					
	2015	2016	2017	2018	2019	2020
Local Centres	28	28	1	5	-1	4
Main Centre	81	26	31	156	74	78
Outside of the Centres	35	-11	58	68	37	1
Total	144	43	90	229	110	83

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

Tenure	Year					
	2015	2016	2017	2018	2019	2020
Affordable Market	54	35	57	47	69	22
Private Market (and other)	90	8	33	182	41	61
Total	144	43	90	229	110	83

*Net change excludes administrative amendments

Table 5.1.5 shows the change in the total number of units from 2015 to 2020. During 2020, there was an increase of 136 units, 48 less than in 2019 and 148 less than in 2018. The number of removed units was 21 less than the previous year, with a loss of 53 units. It must be noted that the Bailiwick of Guernsey went into strict lockdown on 25th March 2020 in order to help slow the spread of COVID-19. Restrictions on all but essential business activities were imposed, including construction sites, and were lifted in phases during April, May and June.

During 2019, new information on the number of property units became available through the introduction of the new waste scheme. The figures presented in the previous edition of this bulletin were restated to reflect this and therefore there are no administrative amendements prior to 2020.

Table 5.1.6 shows the change in the total number of units by parish over time. In the six years ending in 2020, 46.5% of the increase in the total number of domestic property units were situated within St Peter Port. St Pierre du Bois and Torteval contributed the smallest proportion of the change over the last six years.

The Main Centre saw the largest net increase in the number of units during 2015, 2018, 2019 and 2020. Local Centres and Outside of the Centres had the largest net change in units in 2016 and 2017 respectively (see **Table 5.1.7**).

Affordable (social and intermediate) housing units, (see **Table 5.1.8**) accounted for 40.6% of the increase in the total number of domestic property units between 2015 and 2020.

Information on properties created and removed between 2015 and 2020 are shown on the maps in **Figures 5.1.3** and **5.1.4**.

Affordable property units made up 27.2% of the total number of created units between 2015 and 2020, the remaining 72.8% were private housing units or units of other tenure types. Over half (57.1%) of the total number of units created were in the Main Centre and 6.9% in the Local Centres (see **Figure 5.1.3**).

99.4% of units removed during the six years ending in 2020 were private housing units or other tenure types. 43.9% of removed units were in the Main Centre and 2.3% in the Local Centres (see **Figure 5.1.4**). Administrative amendments were not included in these calculations.

Figure 5.1.3: Map of units created between 2015 and 2020 inclusive

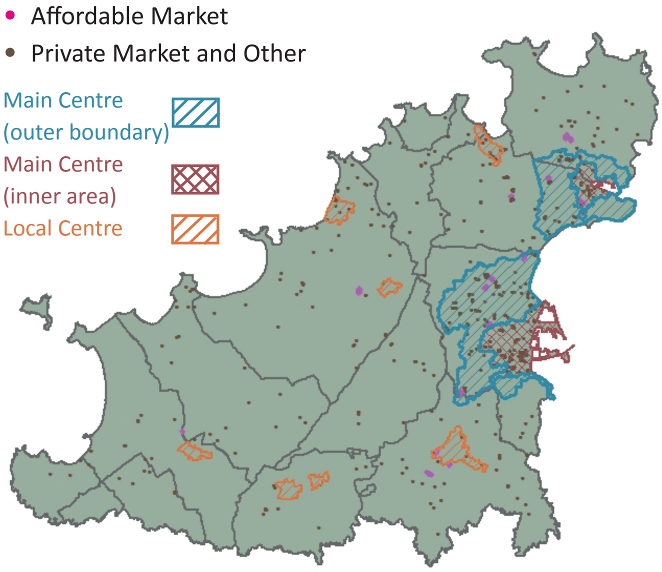
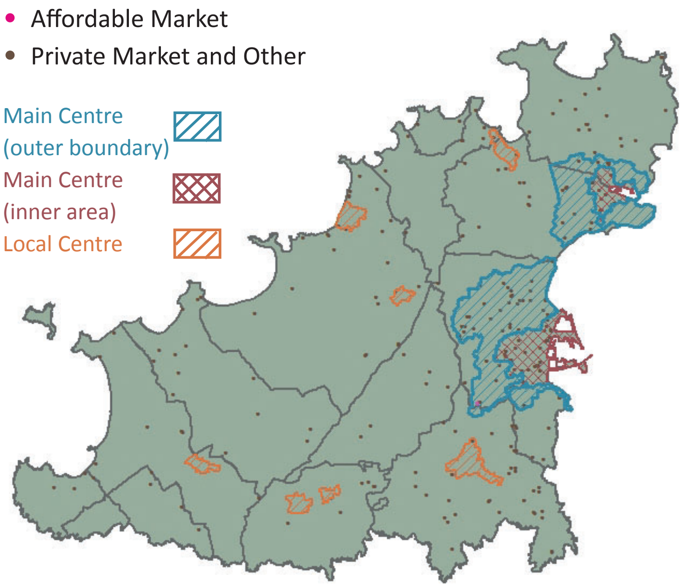


Figure 5.1.4: Map of units removed between 2015 and 2020 inclusive*

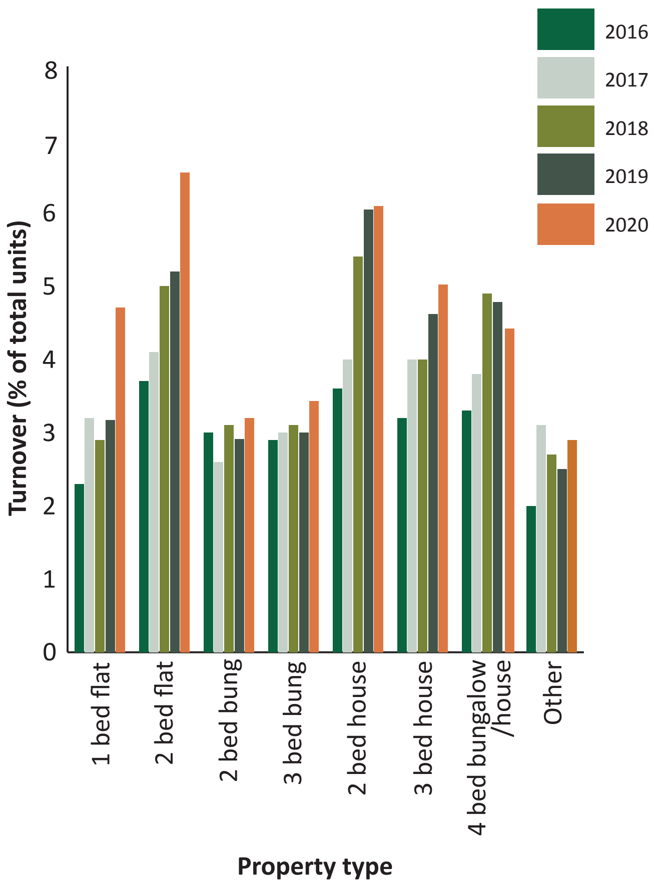


*Some of the units removed between 2015 and 2020 are not displayed on the map

Table 6.1.1: Turnover (no. of Local Market transactions as percentage of housing stock) by type and number of bedrooms

	Percentage of total units by type and number of bedrooms								
	Apartment		Bungalow		House		Bungalow/ house	Other	Total
	1	2	2	3	2	3	4		
2014	2.8	4.1	2.3	2.0	4.2	2.7	2.8	2.5	2.8
2015	2.3	3.4	1.9	2.1	3.1	2.6	2.9	2.2	2.5
2016	2.3	3.7	3.0	2.9	3.6	3.2	3.3	2.0	3.1
2017	3.2	4.1	2.6	3.0	4.0	4.0	3.8	3.1	3.4
2018	2.9	5.0	3.1	3.1	5.4	4.0	4.9	2.7	3.9
2019	3.2	5.2	2.9	3.0	6.0	4.6	4.8	2.5	4.0
2020	4.7	6.6	3.2	3.4	6.1	5.0	4.4	2.9	4.5

Figure 6.1.1: Turnover (no. of Local Market transactions as percentage of housing stock) by type and number of bedrooms



The **Residential Property Prices Bulletin** contains the number of property transactions during each quarter and can be found at **www.gov.gg/property**. This information can be used to monitor the turnover of Local Market properties; the number of conveyances as a proportion of the total stock.

Table 6.1.1 and **Figure 6.1.1** show the turnover of particular categories of property by type and number of bedrooms. The total turnover (of the categories shown in **Table 6.1.1**) in 2020 was 4.5%, compared with 4.0% in 2019.

In 2020, two bedroom apartments saw the highest turnover at 6.6%, 1.4 percentage points higher than in 2019. Between 2010 and 2020, two bedroom properties accounted for the highest percentage turnover by category each year. Two bedroom houses accounted for the second highest percentage turnover in 2020 at 6.1%.

7.1 Vacant units

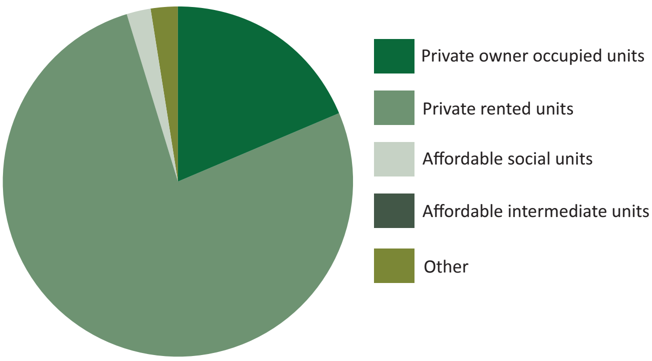
Table 7.1.1: Number of vacant units by Market

Year	No. vacant units			% of island total units
	Local	Open	Total	
2015	207	13	220	0.8
2016	130	6	136	0.5
2017	122	7	129	0.5
2018	135	13	148	0.5
2019	178	16	194	0.7
2020	163	13	176	0.6

Table 7.1.2: Tenure of vacant units by Market

Tenure		2020			
		Local	Open	Total	% of unit
Private Market	Owner Occupied	27	6	33	0.2
	Rented	129	6	135	1.8
Affordable Market	Social	4	0	4	0.2
	Intermediate	0	0	0	0.0
Other		3	1	4	0.5
Total		163	13	176	0.6

Figure 7.1.1: Tenure of vacant units at 31st December 2020



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 (and without other evidence to suggest that they have been occupied) were matched against address data taken from the Rolling Electronic Census in 2020. 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 2020, were classified as vacant.

During 2019, new information on the number of vacant units became available through the Household Expenditure Survey. This was used in combination with information from Guernsey Electricity and the Rolling Electronic Census to calculate the number of vacant properties in 2019 and 2020. This results in a higher number of vacant properties for 2019 and 2020 than previous years.

In December 2020, 176 (0.6%) of the island's domestic property stock had been vacant for a year or more. This compares with 194 for the year ending December 2019 and 148 in 2018 (see **Table 7.1.1**).

Table 7.1.2 shows the number of vacant units broken down by Market and tenure. All residential tenures of domestic units (e.g. self-catering and social units) are included. 1.8% of privately rented units (135 units) had been vacant for a year or more at the end of December 2020.

As can be seen in **Figure 7.1.1**, privately rented units made up the highest proportion of vacant units (76.7%), compared with 18.8% of owner occupied units and 2.3% of Affordable units at the end of December 2020. The remaining 2.3% of vacant properties had a tenure type of other, which includes self-catering units and staff accommodation.

8.1 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 2020, 273 (1%) of the 27,228 property units, including Residential and Nursing homes, were specialised. Of these, 61.5% (168 units) were located in the Affordable market and 105 units were located in the private market, 96 in the Local Market and 9 in the Open Market (see **Figure 8.1.1**).

The proportion of specialised housing differs between the Local and Open Market. 0.6% of the total number of Open Market units were specialised compared to 1.0% of Local Market units (see **Table 8.1.1**).

In the Local Market, the number of Affordable specialised housing units has increased since 2015 (see **Table 8.1.2**) whereas the number of private specialised units have remained relatively stable. **Table 8.1.3** shows a gradual decrease in the number of specialised units in the Open Market since 2015.

Table 8.1.1: Specialised housing by Market*

Tenure		2020					
		No. units			% of total units		
		Local	Open	Total	Local	Open	Total
Specialised	Private Market	96	9	105	0.4	0.6	0.4
	Affordable Market	168	0	168	0.7	0.0	0.6
Non-specialised	Private Market	22,153	1,564	23,717	86.5	97.4	87.1
	Affordable Market	2,438	0	2438	9.5	0.0	9.0
Other		768	32	800	3.0	2.0	2.9
Total		25,623	1,605	27,228	100.0	100.0	100.0

Figure 8.1.1: Specialised housing units by Market* at 31st December 2020

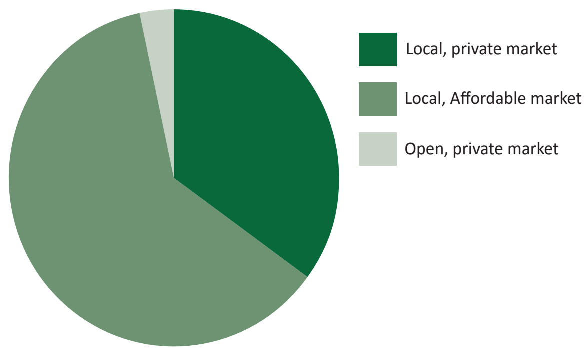


Table 8.1.2: Specialised Local Market units*

	Specialised		Non-specialised		Other
	Private Market	Affordable Market	Private Market	Affordable Market	
2015	97	119	21,775	2,298	792
2016	95	151	21,861	2,297	727
2017	98	165	21,899	2,337	731
2018	95	166	22,063	2,382	739
2019	97	166	22,082	2,417	789
2020	96	168	22,153	2,438	768

Table 8.1.3: Specialised Open Market units*

	Specialised	Non-specialised	Other
	Private Market	Private Market	
2015	11	1,568	32
2016	10	1,564	27
2017	10	1,556	29
2018	10	1,564	33
2019	9	1,566	36
2020	9	1,564	32

*including Residential and Nursing homes

8.2 Specialised housing- number of bedrooms and location

Table 8.2.1: Proportion of specialised housing units by number of bedrooms (%)

No. bedrooms	2020	
	Private Market	Affordable Market
1	20.9	38.1
2	10.3	22.3
3	0.0	0.0
4	0.0	0.0
Over 4	7.3	0.7
Unknown	0.0	0.4
Total	38.5	61.5

Table 8.2.2: Proportion of specialised housing units by type and number of bedrooms (%)

Type	No. bedrooms	2020		
		Local Market	Open Market	Total
Apartment	1	59.0	0.0	59.0
	2	32.6	0.0	32.6
	Unknown	0.4	0.0	0.4
Other	Over 4	4.8	3.3	8.1
Total	Total	96.7	3.3	100.0

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

Table 8.2.1 shows that 59.0% of specialised housing units had one bedroom; 38.1% in the Affordable market. Two bedroom units accounted for 32.6% of the total specialised housing units. In total, 61.5% of all specialised housing units were located in the Affordable market (see **Table 8.2.1**).

At the end of December 2020, 91.9% of specialised units were apartments and 8.1% were Residential and/or Nursing homes. No bungalows or houses were categorised as specialised at the end of 2020 (see **Table 8.2.2**).

It can also be seen in **Table 8.2.2** that 96.7% of all specialised housing units were located in the Local Market. The remaining 3.3% of Open Market units were Residential or Nursing homes and had more than four bedrooms.

Le Grand Courtil and Nouvelle Maraitaine are located in St Martin and Vale respectively. These parishes had the highest proportion of specialised units (3.4% and 1.9% of all property units within those parishes, respectively) at the end of December 2020. St Peter Port had the third highest proportion of specialised housing units (1.0%), where Rosaire Court and Gardens is located.

At the end of December 2020, every parish contained a Residential or Nursing home with the exception of St Pierre du Bois and Forest.

9.1 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 8** 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/populationmanagement** for more information). The data in this bulletin, with the exception of **Section 8**, 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 8** 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.

9.1 Definitions and categories used

Tenure of Domestic Property Units

The tenure describes the basis on which households occupy the property unit. 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 8)**.

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

10.1 Contact details and further information

This bulletin is 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.

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