Guernsey Annual Housing Stock Bulletin

31st December 2012 - Issue date 13th March 2013

POLICY COUNCIL
THE STATES OF GUERNSEY

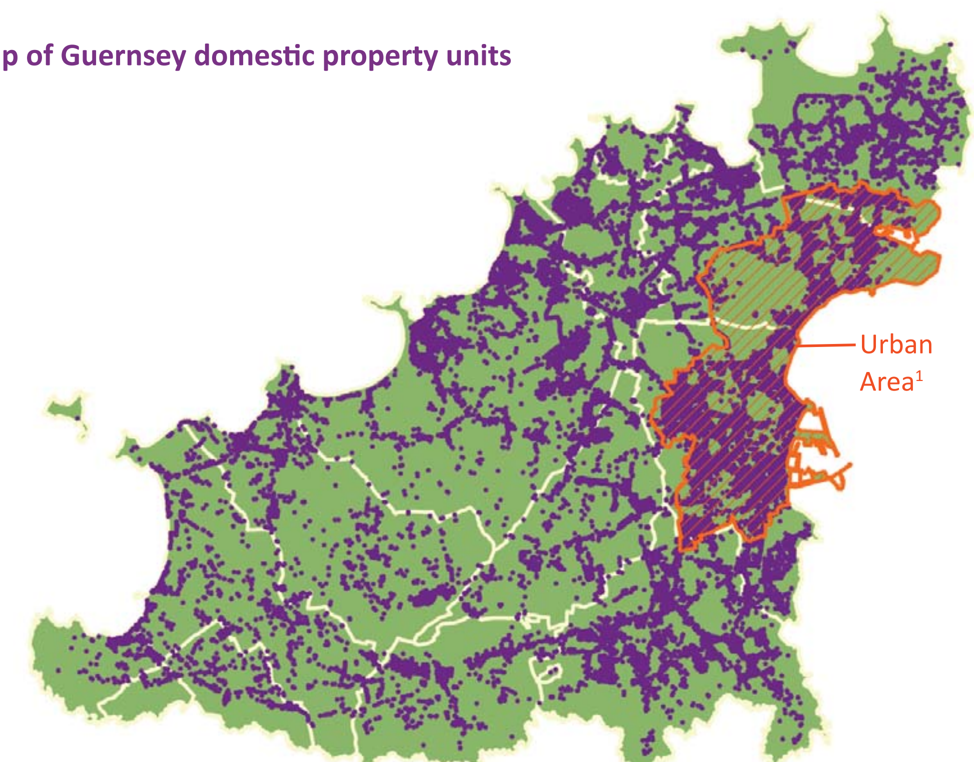
1.1 Introduction

The Guernsey Annual Housing Stock Bulletin provides a snapshot of Guernsey's domestic property stock and how this has changed since data first became available in 2010. Data on properties is sourced from several States of Guernsey Departments and is brought together in a system which enables statistical and spatial analysis, provided by Digimap Ltd. The data analysis is performed by the Policy and Research Unit, which prepares this bulletin.

1.2 Headlines

- At the end of December 2012, the total number of domestic property units on the Island was 26,172, of which 1,595 (6%) were Open Market Part A.
- During 2012, 152 new units were created and 68 units were removed - a net increase of 84.
- 76% of the total units were houses or bungalows and 23% were apartments, unchanged from December 2011. The remaining 1% were other types of unit.
- The highest proportion (33%) of the total units had 3 bedrooms.
- 61% of the units were owner occupied, 27% were rented and 8% were social housing (compared to 62%, 26% and 8% respectively at the end of 2011). The remaining 4% of units were of other tenure types or were vacant.

Figure 1.2.1: Map of Guernsey domestic property units



[1] The "Urban Area" referred to throughout this bulletin, shown in red/orange on the maps, is an area designated by the States of Guernsey for planning purposes and covered by the Urban Area Plan. More information is available on page 11.

1.3 Contents

2.1 Domestic property units - summary of annual changes

At the end of December 2012, there were 26,172 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).

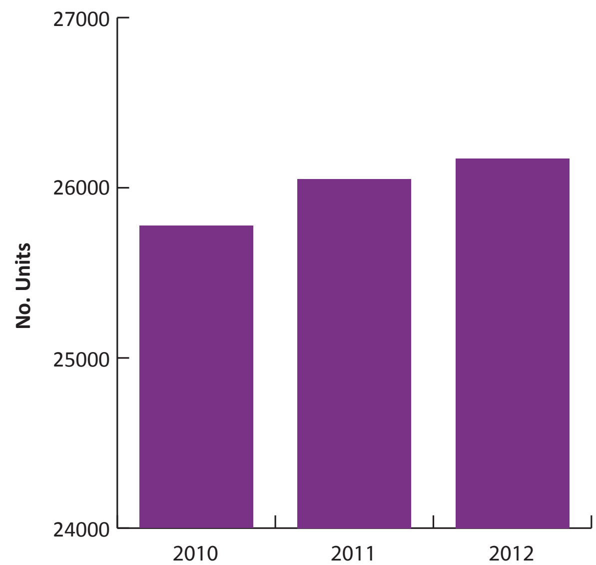
Table 2.1.1 and ***Figure 2.1.1*** show the change in the total recorded number of domestic property units since 2010. At the end of 2012, there were 120 (0.5%) more domestic property units than at the end of 2011. The increase can be attributed to a net change of 84 units plus 36 administrative amends during 2012, compared to 230 and 45 respectively in 2011.

More information on the change in the number of units is available in ***Section 5*** on ***page 22.***

Table 2.1.1: Total domestic units

Year	Total no. units	Net change	Administrative amendments	% Change in total
2010	25,777	-	-	-
2011	26,052	230	45	1.1%
2012	26,172	84	36	0.5%

Figure 2.1.1: Total domestic units



2.2 Domestic property units - market and type

Table 2.2.1: Units by market

Market	2012	
	No. units	% of units
Local	24,577	94%
Open	1,595	6%
Total	26,172	100%

Table 2.2.2: Type of units by market

Type	2012					
	No. units			% of units		
	Local	Open	Total	Local	Open	Total
Apartment	5,882	164	6,046	24%	10%	23%
Bungalow	9,856	380	10,236	40%	24%	39%
House	8,586	1,041	9,627	35%	65%	37%
Other	253	10	263	1%	1%	1%
Total	24,577	1,595	26,172	100%	100%	100%

Figure 2.2.1: Type of Local Market units

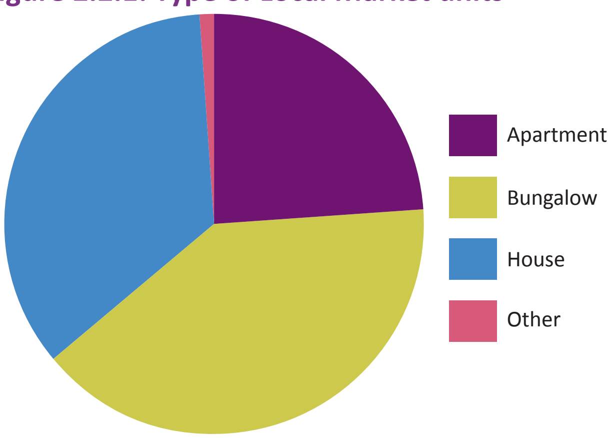
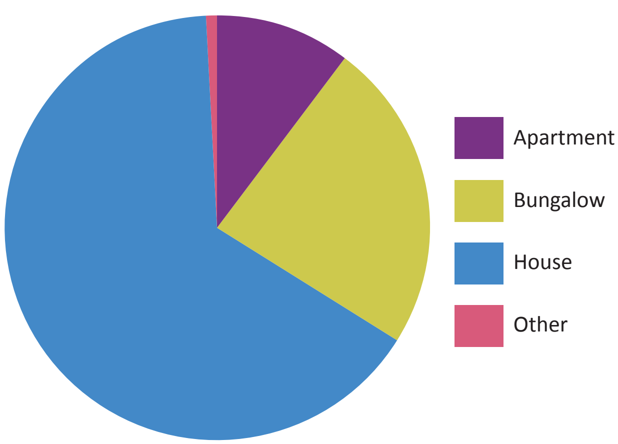


Figure 2.2.2: Type of Open Market units



Of the 26,172 domestic property units, 94% were Local Market and the remaining 6% were Open Market Part A units (see ***Table 2.2.1***).

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

The distribution of property unit types did not change in 2012. Bungalows and houses accounted for the largest proportion of property units (Local and Open Market combined), comprising 39% and 37% of the total respectively. 23% of property units were apartments and the remaining 1% were other types of unit (see ***Table 2.2.2***).

Figures 2.2.1 and ***2.2.2*** illustrate the different proportions of unit types which comprise the Open and Local Markets. For example, 24% of Local Market property units were apartments, compared to 10% of Open Market property units.

Please see ***Page 25*** 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 2.2.2*** and throughout this report.

2.3 Domestic property units - bedrooms

Information on the number of bedrooms per property unit was originally sourced from the 2001 Census. This is now updated and maintained using information sourced from property sale adverts, Cadastre and other States sources. Bedroom data is currently unavailable for 9% of the Island's property units.

At the end of December 2012, the highest proportion (33%) 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 33% and 32% respectively.

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.

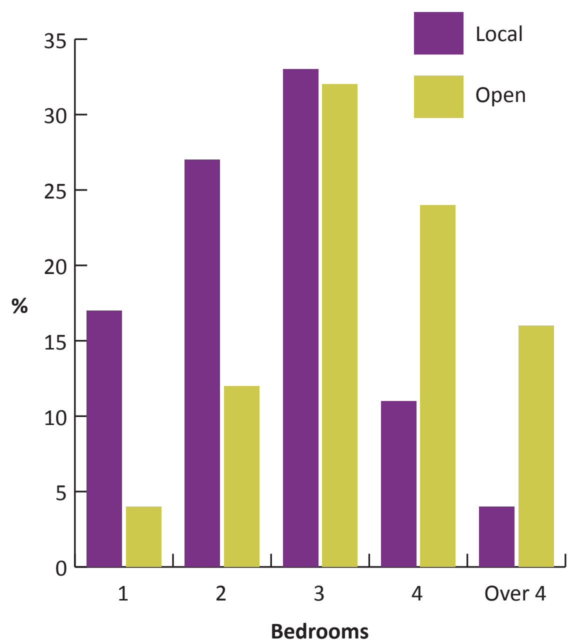
The proportion of units by number of bedrooms in the Local Market has changed very little since 2010 when this bulletin was first produced. In the Open Market, the proportion of property units with four or more bedrooms has decreased by 6 percentage points since 2010, whilst the proportion of one and two bedroom units has increased by 6 percentage points. The bulk of this change occurred in 2011, however, as there was minimal change in distribution in the period from December 2011 to December 2012.

At the end of December 2012, 17% of Local Market units had one bedroom, compared to 4% of Open Market units. At the other end of the scale, 40% of Open Market units had four or more bedrooms, compared to 15% of Local Market units.

Table 2.3.1: Number of bedrooms per unit by market

No. bedrooms						2012
			No. units			% of units
	Local	Open	Total	Local	Open	Total
1	4,189	61	4,250	17%	4%	16%
2	6,613	187	6,800	27%	12%	26%
3	8,061	504	8,565	33%	32%	33%
4	2,656	377	3,033	11%	24%	12%
Over 4	901	261	1,162	4%	16%	4%
Unknown	2,157	205	2,362	9%	13%	9%
Total	24,577	1,595	26,172	100%	100%	100%

Figure 2.3.1: Number of bedrooms per unit by market

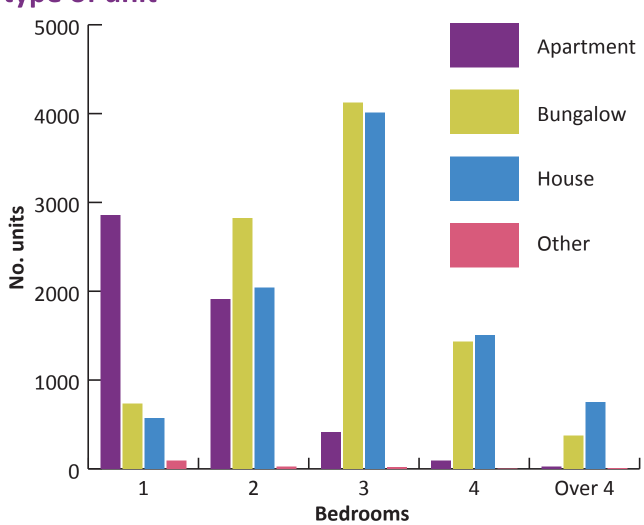


2.4 Domestic property units - type and bedrooms

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

Type	No. bedrooms	2012			
		Local	Open	Total	% of total units
Apartment	1	2,831	25	2,856	11%
	2	1,867	45	1,912	7%
	3	379	33	412	2%
	4	81	11	92	0%
	Over 4	28	-	28	0%
	Unknown	696	50	746	3%
	Total	5,882	164	6,046	23%
Bungalow	1	726	6	732	3%
	2	2,761	61	2,822	11%
	3	3,957	164	4,121	16%
	4	1,355	77	1,432	5%
	Over 4	337	39	376	1%
	Unknown	720	33	753	3%
	Total	9,856	380	10,236	39%
House	1	542	29	571	2%
	2	1,963	79	2,042	8%
	3	3,706	307	4,013	15%
	4	1,216	289	1,505	6%
	Over 4	530	222	752	3%
	Unknown	629	115	744	3%
	Total	8,586	1,041	9,627	37%
Other	1	90	1	91	0%
	2	22	2	24	0%
	3	19	-	19	0%
	4	4	-	4	0%
	Over 4	6	-	6	0%
	Unknown	112	7	119	0%
	Total	253	10	263	1%
	Total	24,577	1,595	26,172	100%

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 2012, three bedroom bungalows and three bedroom houses made up the largest proportions (forming 16% and 15% respectively) of the total units (see ***Table 2.4.1*** and ***Figure 2.4.1***).

Two bedroom bungalows and one bedroom apartments contributed the next largest proportions (each making up 11% of the total).

Two bedroom houses and apartments formed 8% and 7% of the total respectively.

Please see ***page 25*** 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 74% 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 2012, the largest proportion of Local Market property units fell into the 101 to 150 TRP units band. By comparison, the modal band for Open Market units was 251 to 300 TRP units. This is the same trend as seen in 2011.

18.7% of Open Market property units had a TRP of over 500 units, compared to 1.1% of the Local Market. This compares to 19.3% and 1.2% for Open and Local Market respectively in 2011. Whilst this represents a slight decrease in the proportion of Open Market property units with a TRP of over 500 units, they 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 later in the bulletin.

Table 2.5.1: Domestic TRP distribution by market

Domestic TRP units			2012
	% of Local Market units	% of Open Market units	% of total units
50 or less	1.2%	0.6%	1.2%
51 to 100	19.4%	1.1%	18.1%
101 to 150	31.2%	2.2%	29.1%
151 to 200	23.5%	10.8%	22.6%
201 to 250	11.7%	14.9%	12.0%
251 to 300	5.6%	16.2%	6.3%
301 to 350	3.1%	12.3%	3.8%
351 to 400	1.5%	9.1%	2.0%
401 to 450	1.1%	7.9%	1.6%
451 to 500	0.6%	6.3%	1.0%
501 to 550	0.4%	3.9%	0.6%
551 to 600	0.2%	2.7%	0.4%
601 to 650	0.1%	2.6%	0.3%
651 to 700	0.1%	2.3%	0.3%
701 to 750	0.1%	1.7%	0.2%
751 to 800	0.0%	1.4%	0.1%
801 to 850	0.0%	0.8%	0.1%
851 to 900	0.0%	0.8%	0.1%
901 to 950	0.0%	0.6%	0.1%
951 to 1000	0.0%	0.3%	0.0%
Over 1000	0.0%	1.6%	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

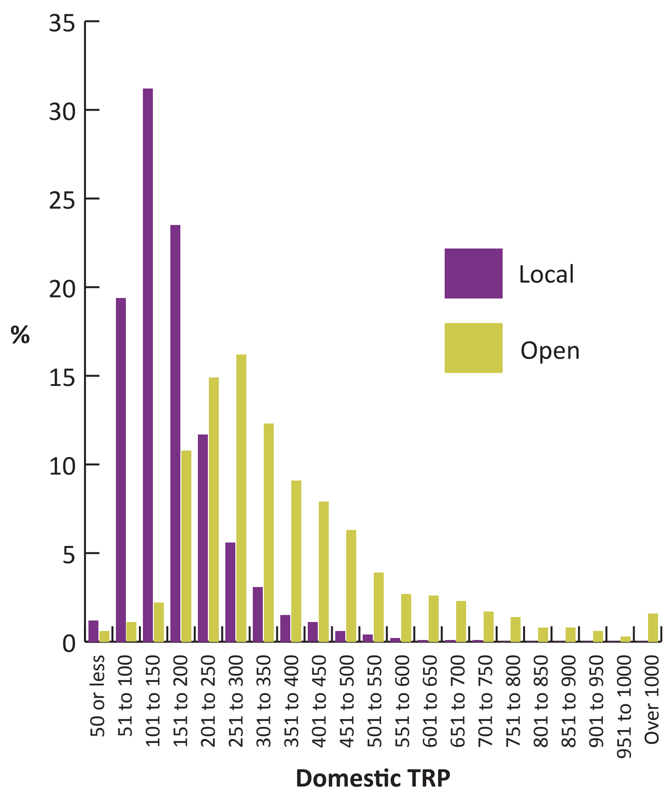


Table 2.6.1: Domestic TRP of units by type and number of bedrooms

Type	No. bedrooms	2012
		Median TRP
Apartment	1	65
	2	85
	3	123
	4	118
	Over 4	87
Bungalow	1	107
	2	136
	3	163
	4	196
	Over 4	235
House	1	123
	2	121
	3	156
	4	233
	Over 4	336
Overall median for all domestic property units		153

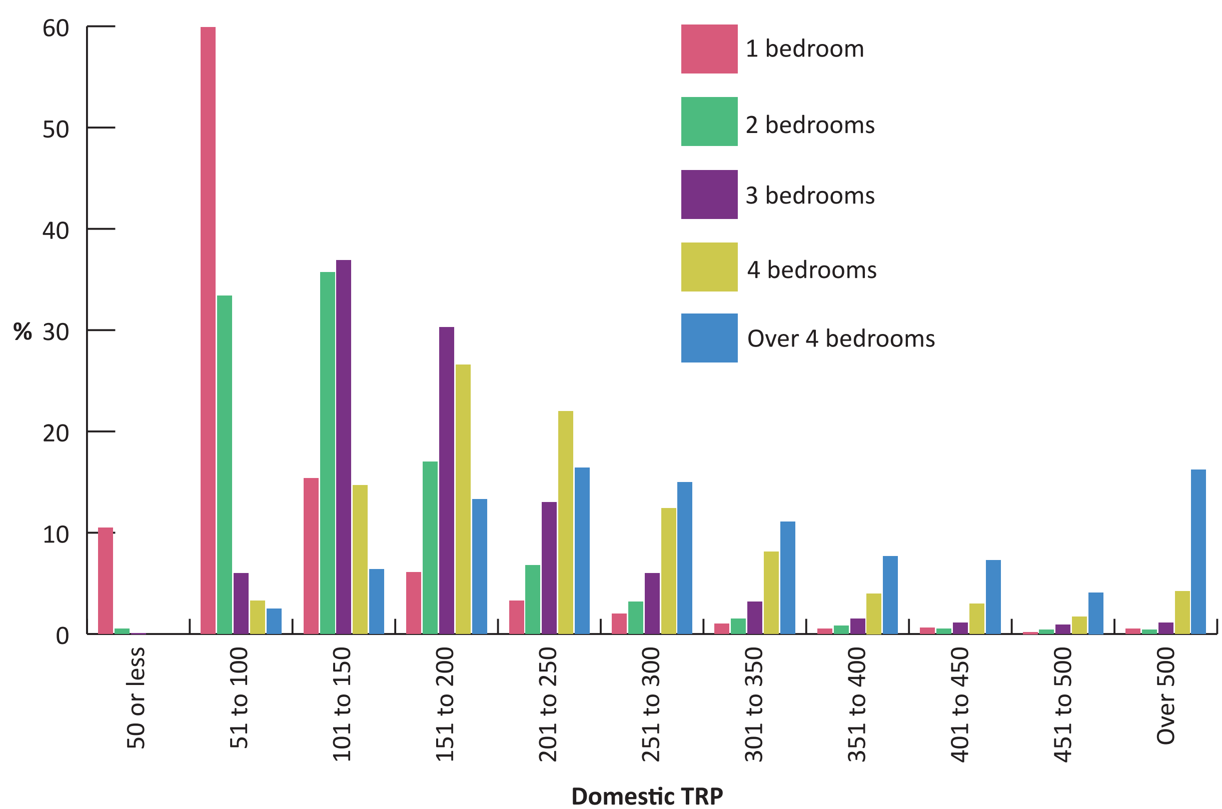
As previously noted, the number of domestic TRP units represents a measure of the size (based on square metres of floor area) of a domestic property unit, excluding land.

The overall median number of TRP units, per property unit was 153 at the end of December 2012, compared to 154 at the end of 2011 and 153 at the end of 2010.

As expected, the number of TRP units generally increases as the number of bedrooms increases, tends to be higher for houses than bungalows and tends to be lowest for apartments. This is shown in ***Table 2.6.1.***

Figure 2.6.1 shows the distribution of TRP values for units with different numbers of bedrooms. Over half of the one bedroom units (60%) are concentrated within the 51 to 100 TRP units band. The distribution of units with more than one bedroom, however, is broader.

Figure 2.6.1: Domestic TRP distribution by number of bedrooms



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.

At the end of December 2012, 16,028 (61%) of the domestic property units in Guernsey were owner occupied. There were 7,066 rented domestic units (27%), which was an increase of 178 units (0.6 percentage points) since 2011. The 2,054 social units (8% of domestic property units) consist of the occupied rental and partial ownership units owned by the States of Guernsey and the Guernsey Housing Association.

The remaining 1,024 units (4%) had other tenure types including staff accommodation, self catering or vacant. More information on vacant units is provided on ***page 24***.

The proportions by tenure differ between the Local and Open Market. Both the Local and Open Markets saw a very small increase (0.6 and 0.4 percentage points respectively) in the proportion of rented units and a corresponding decrease in the proportion of owner occupied units between 2011 and 2012. This continues the pattern seen in changes between 2010 and 2011.

All of the social units are in the Local Market of which they constituted 8% at the end of December 2012. As such, owner occupied and rented units account for a greater proportion of the Open Market (66% and 32% respectively) than of the Local Market, in which 61% were owner occupied and 27% were rented.

Over the following pages, more detailed analysis is presented on property units broken down by the tenure categories shown in ***Table 2.7.1***.

Table 2.7.1: Tenure of units by market

Tenure						2012
			No. units			% of total units
	Local	Open	Total	Local	Open	Total
Owner occupied	14,975	1,053	16,028	61%	66%	61%
Rented	6,552	514	7,066	27%	32%	27%
Social	2,054	0	2,054	8%	0%	8%
Other	996	28	1,024	4%	2%	4%
Total	24,577	1,595	26,172	100%	100%	100%

Figure 2.7.1: Tenure of Local Market units

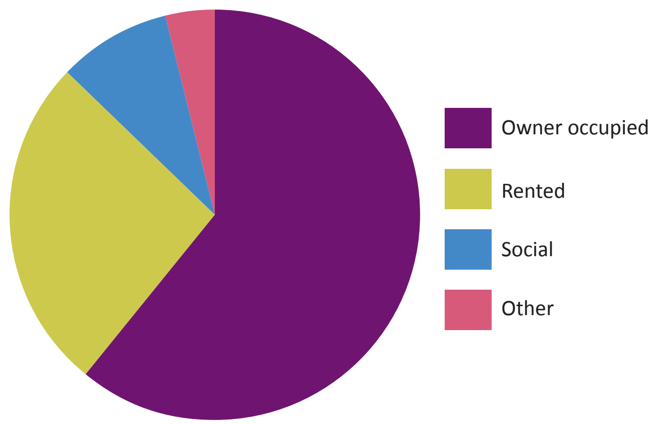
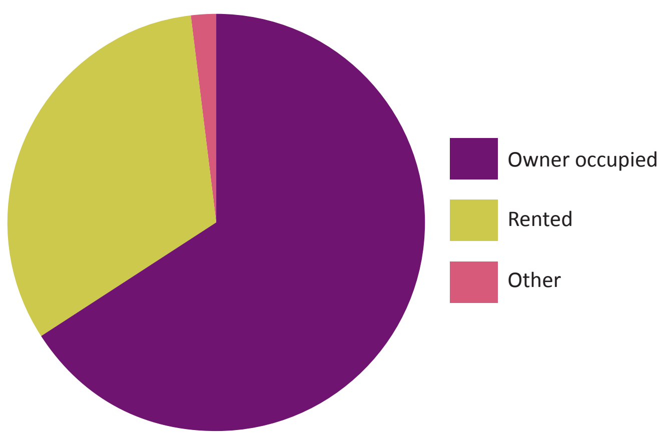


Figure 2.7.2: Tenure of Open Market units



2.8 Domestic property units - location

Table 2.8.1: Density of units by location

Parish	No. units	% of total units	No. units per km²
Castel	3,476	13%	341
Forest	631	2%	154
St Andrew	928	4%	206
St Martin	2,598	10%	355
St Peter Port	8,459	32%	1,319
St Pierre du Bois	884	3%	138
St Sampson	3,830	15%	612
St Saviour	1,127	4%	176
Torteval	403	2%	130
Vale	3,836	15%	430
Rural Area	15,307	58%	275
Urban Area	10,865	42%	1,366
Total and overall density	26,172	100%	412

Figure 2.8.1: Location of Local Market units

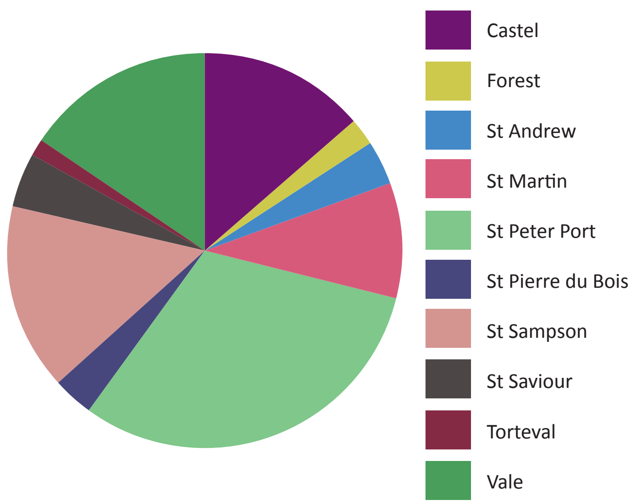
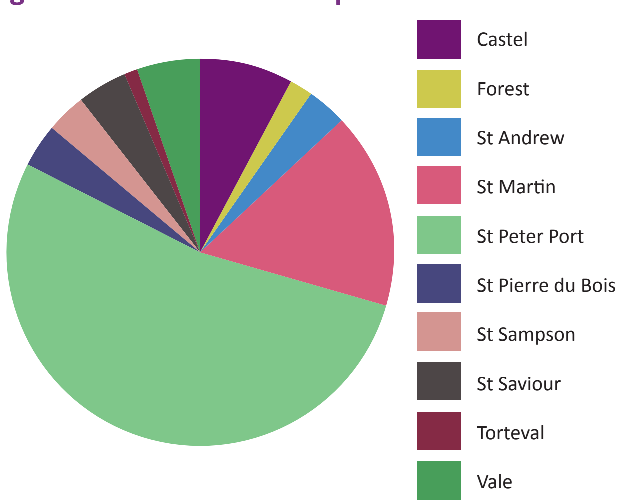


Figure 2.8.2: Location of Open Market units



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

At the end of December 2012, 32% of all property units (8,459 of the total 26,172) were concentrated within the parish of St Peter Port (see ***Table 2.8.1***).

St Sampson and Vale each contained over 3,800 (15%) of the Island's property units.

Castel, which is the Island's largest parish by area, contained 3,476 (13%) of the units.

Torteval, which is the smallest parish by area, contained the smallest number of property units, at 403 (2%).

The parish of St Peter Port had the highest density of units, with 1,319 units per square kilometre. This was an increase of 11 units per square kilometre compared to 2011 and more than double the density of any other parish. The parish with the lowest density of property units was Torteval, which had 130 units per square kilometre.

Figures 2.8.1 and ***2.8.2*** show the proportions of Local and Open Market units in each parish. The distribution of the units is also shown spatially on the maps on the opposite page.

Just over half (53%) of the Open Market units on the Island are situated in St Peter Port, in comparison to just under a third (31%) of all Local Market property units.

Table 2.8.2 on the page opposite 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 10% in each) and lowest in St Sampson where 99% of the units were Local Market.

2.8 Domestic property units - location

Guernsey's land use planning system currently divides the Island into two administrative areas, Urban and Rural, which operate very different policies for the control of development. Development Plans provide the policy framework for the assessment of all planning applications made.

A major review of the Strategic Land Use Plan led to the States adopting a new strategic direction for development in November 2011, which provides the framework for a major review of the Development Plans currently being undertaken by the Environment Department.

However, at present, in line with the 2000 Strategic and Corporate Plan, the Urban Area Plan (marked in red /orange on the maps throughout this bulletin) covers 18% of the Island's land mass (including the two main centres of Town and the Bridge) and makes provision for the majority of the Island's development needs. In housing terms, the Plan provides for 90% of new units to be accommodated in the Urban Area.

The remaining majority portion of the Island is recognised in the Rural Area Plan and operates a policy of conservation and enhancement, while making limited provision for new development. In terms of housing, the remaining 10% provision is envisaged to be achieved through the conversion and subdivision of buildings and very limited social housing developments in the Rural Area.

The density of residential property units per square kilometre is nearly five times greater in the Urban area than the Rural area. At the end of December 2012, 42% of all units were located within the Urban Area.

More information on the location of units that were created or removed in 2012 is provided on ***page 22***.

Table 2.8.2: Location of units by market

Location	2012					
	No. units			% of parish total units		
	Local	Open	Total	Local	Open	Total
Castel	3,348	128	3,476	96%	4%	100%
Forest	601	30	631	95%	5%	100%
St Andrew	875	53	928	94%	6%	100%
St Martin	2,335	263	2,598	90%	10%	100%
St Peter Port	7,617	842	8,459	90%	10%	100%
St Pierre du Bois	826	58	884	93%	7%	100%
St Sampson	3,773	57	3,830	99%	1%	100%
St Saviour	1,063	64	1,127	94%	6%	100%
Torteval	383	20	403	95%	5%	100%
Vale	3,756	80	3,836	98%	2%	100%
Rural Area	14,362	945	15,307	94%	6%	100%
Urban Area	10,215	650	10,865	94%	6%	100%
Total	24,577	1,595	26,172	94%	6%	100%

Figure 2.8.3: Map of Local Market units

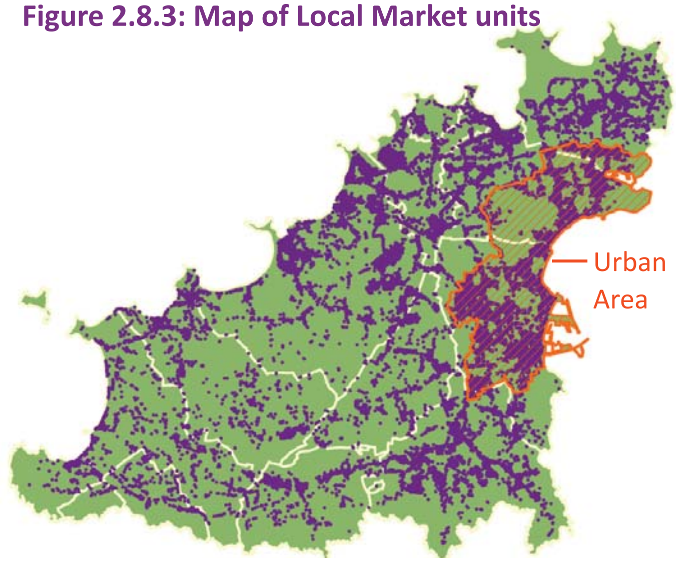
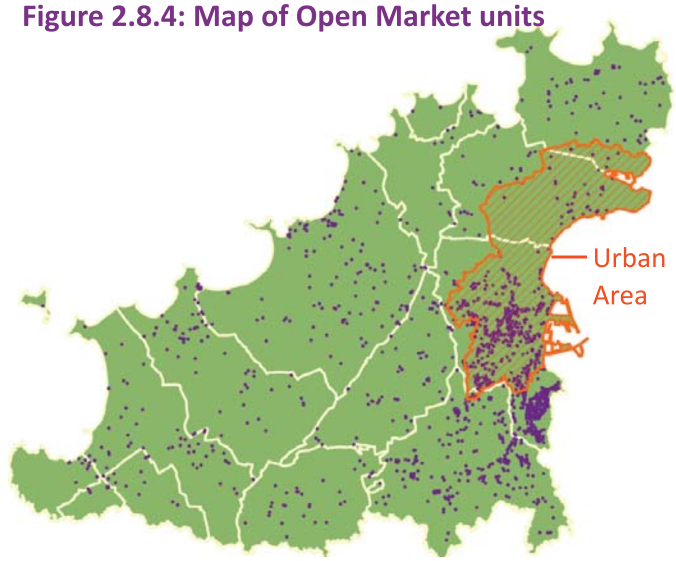


Figure 2.8.4: Map of Open Market units



2.9 Domestic property units - location and bedrooms

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

Location						2012
	% of parish total units by no. bedrooms					
	1	2	3	4	Over 4	Unknown
Castel	12%	21%	44%	12%	4%	7%
Forest	7%	23%	35%	13%	5%	18%
St Andrew	6%	21%	38%	16%	9%	10%
St Martin	11%	24%	34%	14%	6%	10%
St Peter Port	26%	29%	23%	9%	4%	10%
St Pierre du Bois	10%	21%	31%	15%	8%	14%
St Sampson	18%	29%	34%	9%	3%	7%
St Saviour	7%	23%	36%	17%	5%	12%
Torteval	8%	24%	30%	18%	8%	12%
Vale	10%	25%	40%	14%	4%	7%
Rural Area	10%	23%	39%	14%	5%	9%
Urban rea	26%	30%	24%	8%	3%	9%
Total	16%	26%	33%	12%	4%	9%

Figure 2.9.1: Number of bedrooms distribution by location of unit

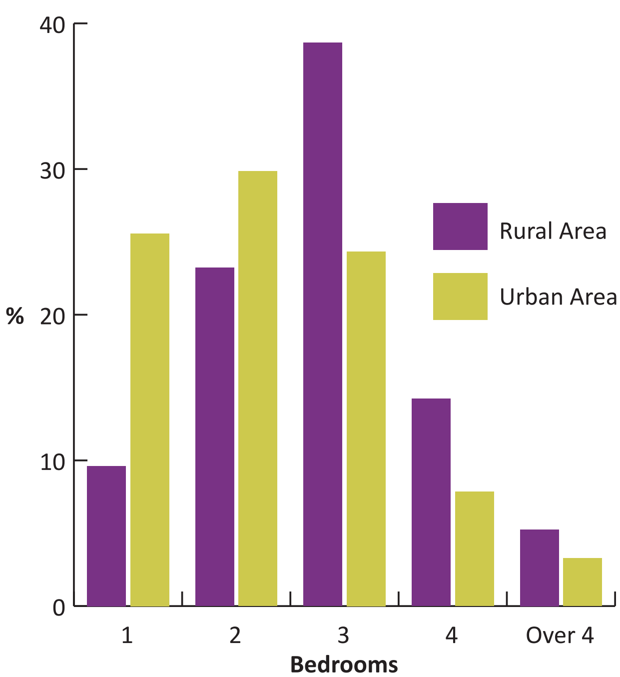


Table 2.9.1 shows the distribution of domestic property units across the Island by their number of bedrooms.

The Urban Area tends to have more one and two bedrooms property units (56%) than the Rural Area (33%). In fact the Urban Area has more than double the concentration of one bedroom property units than the Rural Area (26% compared to 10%).

Property units in the Rural Area are more likely to contain three or four bedrooms than those in the Urban Area (53% versus 32%).

59% of property units across the Island have two or three bedrooms, whilst only 4% have more than four bedrooms.

Three bedroom units make up the greatest proportion (33%) of all 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 units (26% and 29% versus 23% respectively).

By comparing the median number of domestic Tax on Real Property (TRP) units (i.e size) of units in the Urban and Rural Areas by the type and number of bedrooms, it can be seen that properties in the Rural Area tend to be larger than those in the Urban Area.

There was very little change in the median number of domestic TRP units in 2012, decreasing by 1 TRP unit in both the Rural and Urban Areas. The overall median for 2012 was 153 which was 1 TRP unit lower than in 2011. (See ***page 8***.)

As described on the page opposite, property units in the Rural Area tend to have a higher number of bedrooms than those in the Urban Area, so could be expected to have a higher TRP. However, ***Table 2.10.1*** shows that in a "like for like" comparison, properties in the Rural Area tend to be larger. For example, the median three bedroom house in the Rural Area was larger by 27 TRP units than its comparator in the Urban Area at the end of December 2012.

Overall, the median domestic TRP was 45 units higher in the Rural Area than the Urban Area at the end of December 2012, the same gap as seen at the end of December 2011.

The TRP distributions in ***Figure 2.10.1*** illustrate that the majority of Urban Area units fall into the 51 to 150 TRP units bands, compared to the Rural Area units, of which the majority fall into the 101 to 200 bands.

Table 2.10.1: Domestic TRP of Rural and Urban Area units by type and number of bedrooms

Type	No. bedrooms	2012	
		Median TRP of Rural Area units	Median TRP of Urban Area units
Apartment	1	69	64
	2	89	85
	3	114	127
	4	142	115
	Over 4	101	85
Bungalow	1	112	86
	2	139	120
	3	167	138
	4	201	153
	Over 4	242	183
House	1	153	114
	2	151	113
	3	171	144
	4	266	202
	Over 4	389	270
All	1	96	70
	2	137	102
	3	167	141
	4	220	192
	Over 4	307	255
Overall median for all units		170	125

Figure 2.10.1: Domestic TRP distribution by location

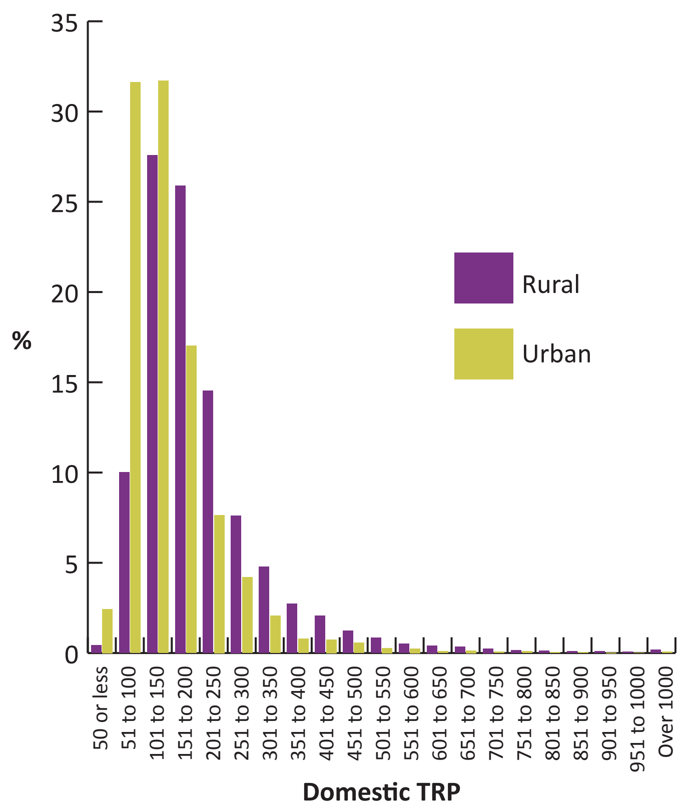


Table 3.1.1: Type and number of bedrooms of Local Market units by tenure

Type	No. bedrooms	2012 Owner occupied	Rented	Social	Other
Apartment	1	17%	66%	13%	3%
	2	25%	60%	8%	7%
	3	25%	58%	11%	6%
	4	21%	72%	2%	5%
	Over 4	14%	79%	0%	7%
	Unknown	10%	76%	0%	14%
	Total	19%	65%	10%	6%
Bungalow	1	52%	22%	21%	5%
	2	80%	16%	2%	2%
	3	88%	11%	1%	1%
	4	88%	11%	0%	1%
	Over 4	89%	9%	0%	2%
	Unknown	62%	28%	0%	10%
	Total	81%	14%	2%	2%
House	1	47%	19%	25%	8%
	2	65%	18%	14%	2%
	3	67%	11%	21%	1%
	4	83%	12%	4%	1%
	Over 4	83%	14%	0%	3%
	Unknown	58%	32%	0%	10%
	Total	68%	15%	15%	2%
Other	1	3%	11%	0%	86%
	2	18%	45%	5%	32%
	3	37%	26%	5%	32%
	4	50%	50%	0%	0%
	Over 4	0%	50%	0%	50%
	Unknown	1%	13%	0%	87%
	Total	7%	17%	1%	75%
Total	1	27%	51%	16%	6%
	2	60%	29%	7%	4%
	3	75%	13%	11%	1%
	4	84%	13%	2%	1%
	Over 4	83%	15%	0%	3%
	Unknown	41%	44%	0%	16%
	Total	61%	27%	8%	4%

This section focuses on Local Market domestic property units. Local Market properties can be occupied by people who are locally residentially qualified or have a housing license.

Table 3.1.1 shows the proportions by tenure of different types of property units at the end of December 2012.

In total, 65% of Local Market apartments were rented, compared to 14% of bungalows and 15% of houses.

Social housing units comprised 15% of the houses, 2% of the bungalows and 10% of the apartments in the Local Market.

In 2012 there was a very small increase (0.4 percentage points) in the number of rented Local Market property units and an equal corresponding decrease in the number of owner occupied units.

There was a small shift (1 percentage point) from owner occupied to rented in two and three bedroom units in 2012.

Please refer back to ***Table 2.4.1*** on ***page 6*** 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, rented and social units in ***Figures 3.1.1***, ***3.1.2.*** and ***3.1.3*** respectively.

The distributions are 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 rented units and most of these contained one or two bedrooms.

The distribution of social units is different to both of the above. Bungalows formed a small portion of social housing units. Three bedroom houses comprised the largest proportion, followed by one bedroom apartments. There were fewer two bedroom than one bedroom social units.

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

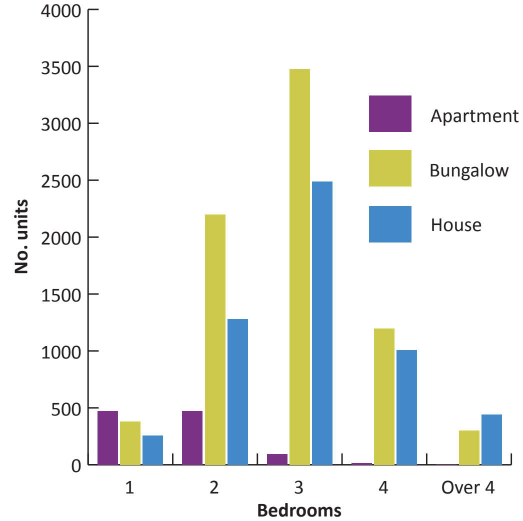


Figure 3.1.2: Number of bedrooms distribution by type of Local Market rented units

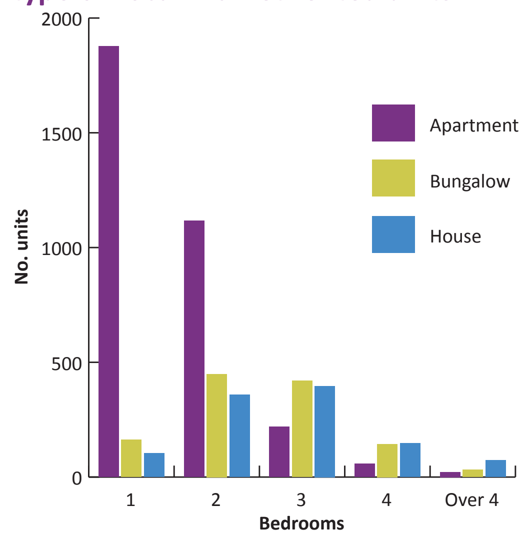
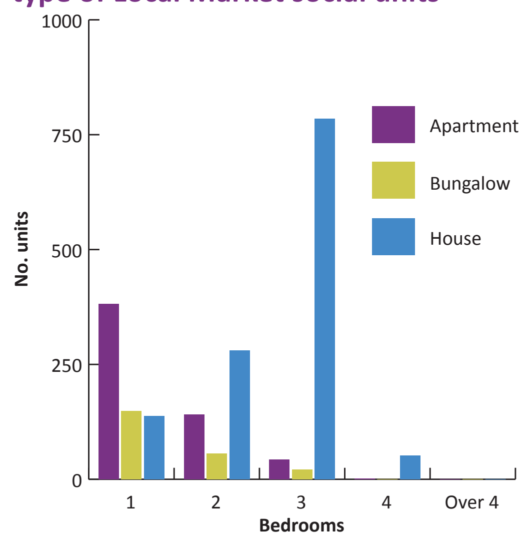


Figure 3.1.3: Number of bedrooms distribution by type of Local Market social units



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	2012	
		Median TRP of Local Market owner occupied units	Median TRP of Local Market rented units
Apartment	1	64	65
	2	86	85
	3	117	116
	4	105	126
	Over 4	79	101
Bungalow	1	112	77
	2	138	118
	3	162	146
	4	193	169
	Over 4	219	243
House	1	119	102
	2	120	110
	3	150	147
	4	213	216
	Over 4	288	297
All	1	82	69
	2	124	100
	3	157	143
	4	201	193
	Over 4	256	275
Overall median for all units		154	117

Table 3.2.1 provides the median number of domestic TRP units of Local 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 2012, the overall median number of domestic TRP units for Local Market owner occupied units was 154, the same as at the end of 2011. This compares to a median TRP of 117 for rental units, which is slightly lower than in 2011 when the median was 119. This suggests a small shift towards smaller rental properties in the Local Market.

Rented four bedroom apartments saw the biggest change in TRP units, their median TRP decreasing by 30 units in 2012. However, these accounted for only 0.4% of all property units so had negligible impact on the overall change in median TRP.

The small decrease in the median TRP for rented property units is largely driven by a decrease in the TRP of rented three bedroom apartments and houses.

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

3.3 Local Market units - tenure and location

Table 3.3.1 gives the location (both by parish and by Urban and Rural Area) of Local Market property units by tenure. Units are mapped individually by tenure in ***Figures 3.3.1, 3.3.2*** and ***3.3.3.***

The proportion of owner occupied units was slightly lower across most parishes in 2012 than in 2011. All parishes except St Martin saw a small increase in the proportion of rented property units.

In 2012, Torteval contained the highest proportion of owner occupied units (78%) and St Peter Port contained the lowest proportion (45%) - the same as in 2011.

St Peter Port had the highest proportion (41%) of rented units, whilst Castel had the highest proportion (11%) of social housing units.

There was a higher concentration of rented and social housing in the Urban Area compared to the Rural Area. In the Urban Area, 48% of units were owner occupied, in comparison to 70% owner occupation in the Rural Area.

These patterns can also be seen in ***Figures 3.3.1, 3.3.2*** and ***3.3.3*** below.

Table 3.3.1: Tenure of Local Market units by location

Location				2012
				% of units
	Owner occupied	Rented	Social	Other
Castel	67%	18%	11%	4%
Forest	65%	20%	6%	8%
St Andrew	71%	19%	7%	3%
St Martin	64%	19%	9%	8%
St Peter Port	45%	41%	10%	4%
St Pierre du Bois	66%	24%	2%	7%
St Sampson	67%	24%	8%	2%
St Saviour	69%	19%	7%	5%
Torteval	78%	19%	0%	4%
Vale	73%	19%	6%	2%
Rural Area	70%	19%	6%	4%
Urban Area	48%	38%	11%	4%
Total	61%	27%	8%	4%

Figure 3.3.1: Map of Local Market owner occupied units

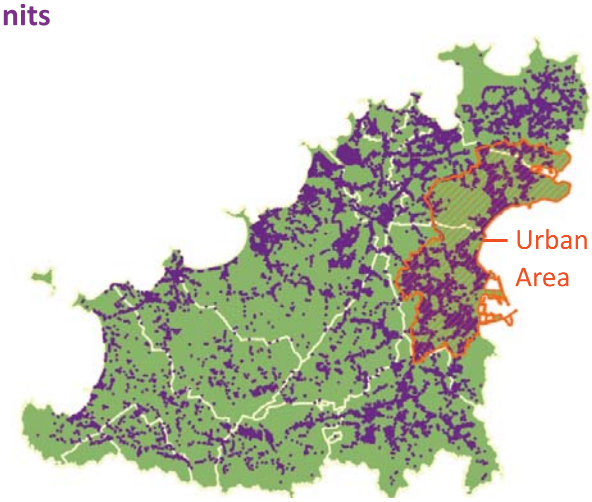


Figure 3.3.2: Map of Local Market social units

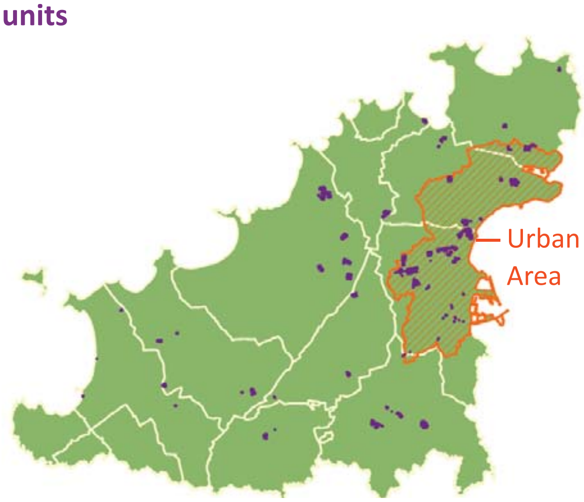
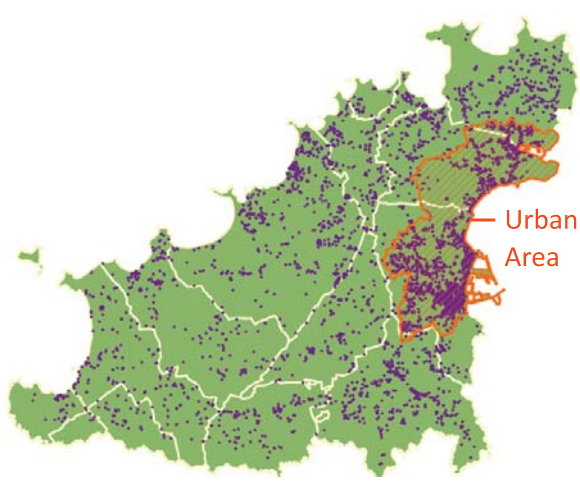


Figure 3.3.3: Map of Local Market rented units



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	2012		
		Owner occupied	Rented	Other
Apartment	1	36%	64%	0%
	2	27%	69%	4%
	3	24%	76%	0%
	4	18%	82%	0%
	Over 4	0%	0%	0%
	Unknown	20%	80%	0%
	Total	25%	74%	1%
Bungalow	1	67%	17%	17%
	2	77%	21%	2%
	3	76%	23%	1%
	4	73%	27%	0%
	Over 4	77%	23%	0%
	Unknown	70%	30%	0%
	Total	75%	24%	1%
House	1	52%	48%	0%
	2	75%	25%	0%
	3	68%	31%	1%
	4	71%	27%	2%
	Over 4	77%	22%	2%
	Unknown	57%	39%	3%
	Total	70%	29%	2%
Other	1	100%	0%	0%
	2	0%	50%	50%
	3	0%	0%	0%
	4	0%	0%	0%
	Over 4	0%	0%	0%
	Unknown	14%	0%	86%
	Total	20%	10%	70%
Total	1	48%	51%	2%
	2	63%	35%	2%
	3	68%	31%	1%
	4	70%	29%	1%
	Over 4	77%	22%	2%
	Unknown	49%	46%	5%
	Total	66%	32%	2%

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 2012. Please note that some of these categories contain low numbers of property units, particularly the "other" category, which has been excluded from the commentary below.

There were small shifts from owner occupied to rented tenures of apartments and bungalows in 2012. However, a marginal increase (0.5 percentage points) in owner occupied Open Market houses and corresponding decrease in rented Open Market houses meant that, because houses account for 65% of all Open Market property units, the overall proportions of owner occupied and rented property units did not change in 2012.

Please refer back to ***Tables 2.2.1*** and ***2.3.1*** on ***pages 4*** and ***5*** 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 2012 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, both peaking in the three bedroom category.

The largest number of Open Market apartments have two bedrooms in both the rented and owner occupied tenures. However, apartments make up a larger proportion of the rental units.

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

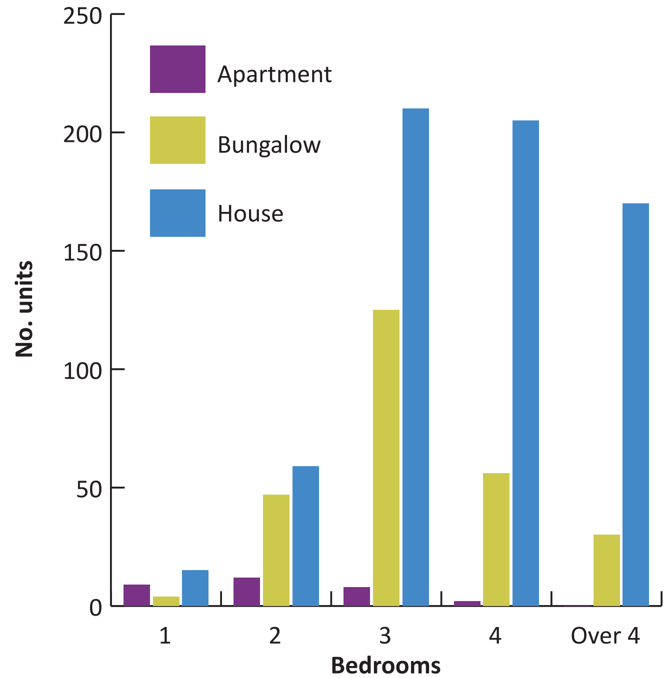
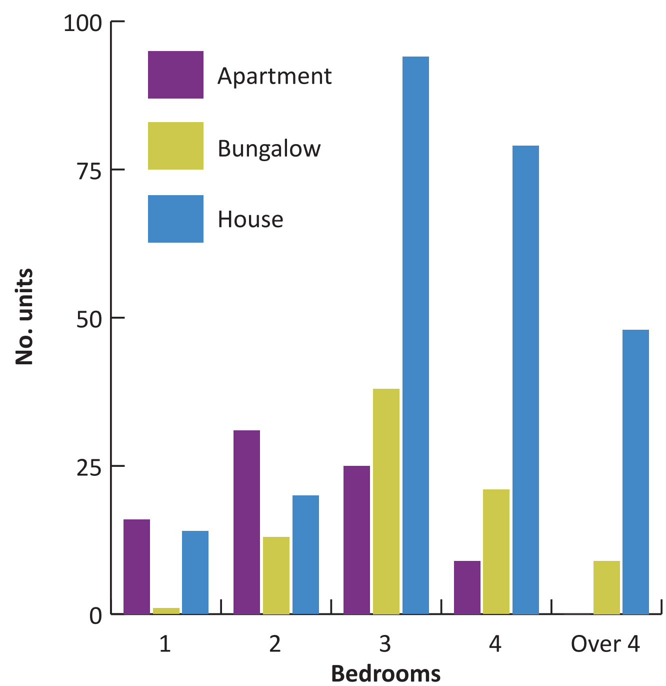


Figure 4.1.2: Number of bedrooms distribution by type of Open Market rented units



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	2012	
		Median TRP of Open Market owner occupied units	Median TRP of Open Market rented units
Apartment	1	107	45
	2	124	123
	3	174	173
	4	100	131
	Over 4	-	-
Bungalow	1	327	-
	2	267	230
	3	281	253
	4	333	296
	Over 4	380	355
House	1	408	293
	2	320	220
	3	310	266
	4	344	301
	Over 4	476	419
All	1	317	196
	2	269	206
	3	292	260
	4	340	294
	Over 4	456	397
Overall median for all units		331	275

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 2012, the overall median number of domestic TRP units of Open Market owner occupied property units was 331, unchanged since the end of 2011. The median number of TRP units for rented Open Market property units was 11 units lower in 2012 than at the end of 2011 (at 275 in 2012 versus 286 in 2011). As in the Local Market, this suggests a shift towards smaller rental units.

On the whole in the Open Market, rented units of the same type and number of bedrooms have a consistently lower number of TRP units (i.e. are smaller in floor area) than their owner occupied equivalents.

Tracking these figures over time will provide an indication of whether changes to domestic property units are resulting in increasing or decreasing Open Market unit sizes in comparison to the Local Market.

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.***

St Andrew had the highest proportion of owner occupied property units (81%) whilst Forest had the lowest proportion (57%).

St Peter Port had the highest proportion (41%) of Open Market rented units.

As seen in the Local Market, there was a higher proportion of owner occupation in the Rural compared to the Urban Area (74% compared to 55% respectively).

In contrast to the pattern seen in the Local Market, owner occupation in the Open Market was slightly higher across most parishes in 2012 than it had been in 2011. However, over half of Open Market property units are located in St Peter Port where there was a small decrease in owner occupation. As such, the overall proportion of owner occupied versus rented Open Market property units did not change.

Table 4.3.1: Tenure of Open Market units by location

Location			2012
			% of units
	Owner occupied	Rented	Other
Castel	78%	20%	2%
Forest	57%	40%	3%
St Andrew	81%	19%	0%
St Martin	77%	21%	2%
St Peter Port	58%	41%	1%
St Pierre du Bois	78%	21%	2%
St Sampson	74%	23%	4%
St Saviour	73%	25%	2%
Torteval	75%	25%	0%
Vale	70%	28%	3%
Rural Area	74%	25%	2%
Urban Area	55%	43%	2%
Total	66%	32%	2%

Figure 4.3.1: Map of Open Market owner occupied units

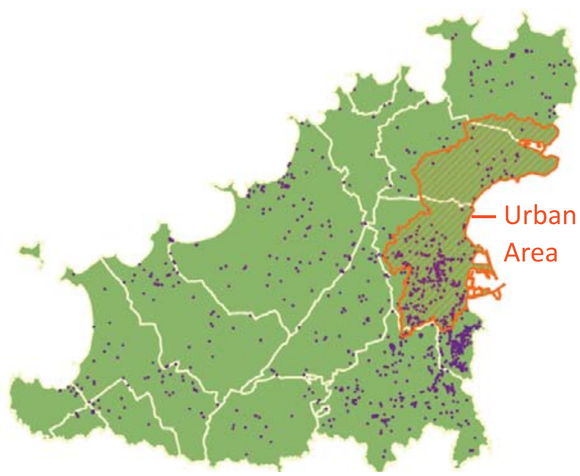
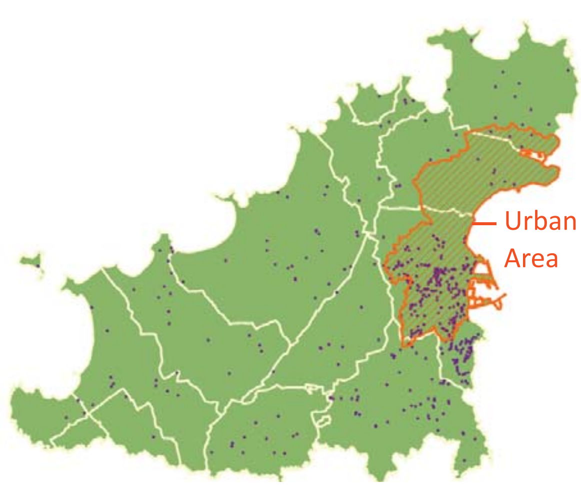


Figure 4.3.1: Map of Open Market rented units



5.1 Changes to the number of units

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

Type of change	2012		
	No. units		
	Plus	Minus	Net change
New build	82	0	82
Demolition	0	59	-59
Subdivision	35	0	35
Amalgamation	0	9	-9
Conversion	35	0	35
Total	152	68	84
Administrative amendments	46	10	36
Total including administrative changes	198	78	120

Figure 5.1.1: Map of units created in 2012

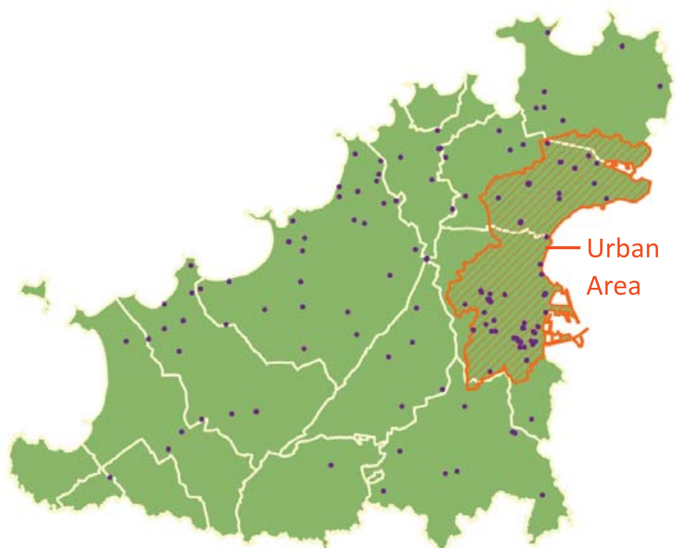
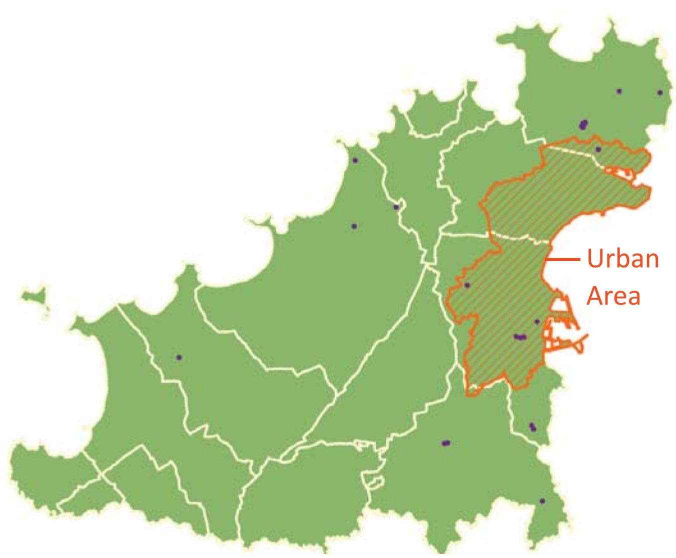


Figure 5.1.2: Map of units removed in 2012



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 (Treasury and Resources Department). ***Figure 5.1.1*** shows the location of the units created during 2012.

Units removed are classified as being demolitions (when they have been wholly or partially raised 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 2012.

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 2011 as a result of administrative changes as further information on existing properties has become available.

5.1 Changes to the number of units

During 2012, using the definitions opposite, 152 new units were created and 68 were removed; a net change of 84.

There was a further net increase of 36 due to administrative amendments, so the overall total increased from 26,052 at the end of 2011 to 26,172 at the end of 2012.

Tables 5.1.2, ***5.1.3*** 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 (61) was St Peter Port. The number of units in St Sampson increased overall by 23 units, whilst Vale saw a net decrease of 24 units during 2012.

Overall, there were was a net change of 12 units in the Rural area, compared to 72 in the Urban Area during 2012.

In the Rural Area, more new units were created via conversion of existing buildings than by new builds (of which more were in fact demolished than built).

Table 5.1.3 shows the net change in the total number of units in 2012 compared to 2011, excluding administrative amendments. Unlike in 2011, there were no large multiple unit developments completed in 2012.

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

Location				2012
				No. units
	Net change from new builds and demolitions	Net change from amalgamations and subdivisions	Net change from conversions	Net change total
Castel	9	2	5	16
Forest	0	1	0	1
St Andrew	-2	0	2	0
St Martin	-3	-1	4	0
St Peter Port	34	19	8	61
St Pierre du Bois	-2	1	1	0
St Sampson	14	2	7	23
St Saviour	0	1	6	7
Torteval	0	0	0	0
Vale	-27	1	2	-24
Rural Area	-16	7	21	12
Urban Area	39	19	14	72
Total	23	26	35	84

Table 5.1.3: Net change in number of units by year

Year			No. units
	Plus	Minus	Net change
2011	279	49	230
2012	152	68	84

Table 6.1.1: Type and number of bedrooms of vacant units by market

Type	No. bedrooms	2012			
		Local	Open	Total	% of Island total units
Apartment	1	39	0	39	1%
	2	62	2	64	3%
	3	4	0	4	1%
	4	2	0	2	2%
	Over 4	2	0	2	7%
	Unknown	23	0	23	3%
	Total	132	2	134	2%
Bungalow	1	9	1	10	1%
	2	25	1	26	1%
	3	27	1	28	1%
	4	10	0	10	1%
	Over 4	3	0	3	1%
	Unknown	9	0	9	1%
	Total	83	3	86	1%
House	1	8	0	8	1%
	2	30	0	30	1%
	3	28	3	31	1%
	4	5	5	10	1%
	Over 4	8	3	11	1%
	Unknown	14	2	16	2%
	Total	93	13	106	1%
Other	1	0	0	0	0%
	2	0	0	0	0%
	3	0	0	0	0%
	4	0	0	0	0%
	Over 4	0	0	0	0%
	Unknown	2	0	2	2%
	Total	2	0	2	1%
Total	1	56	1	57	1%
	2	117	3	120	2%
	3	59	4	63	1%
	4	17	5	22	1%
	Over 4	13	3	16	1%
	Unknown	48	2	50	2%
	Total	310	18	328	1%

The number of vacant units presented on this page is based on electricity consumption data over the year ending December 2012. Properties with low or zero electricity consumption over the year (and without other evidence to suggest that they have been occupied) are classified as vacant.

It provides a measure of the number of properties which have been vacant for a year or more, using a methodology which can be repeated on a consistent basis in order to provide comparable figures in future years. All residential use classes of domestic units (e.g. self catering and social units) are included.

In December 2012, it was calculated that 328 units (or 1%) of the Island's total domestic property units had been vacant for a year or more. This compares to 357 in the year ending mid November 2011.

Table 6.1.1 shows the number of vacant properties broken down by market, type and number of bedrooms where the information was available. There were 134 apartments, 86 bungalows and 106 houses classified as vacant.

The limited bedroom information available indicated that over a third (37%, 120 units) of the vacant units were two bedroom properties.

Apartments had the highest proportion (2%) of vacant units across the Island, compared to 1% for houses, bungalows and other types of unit.

7.1 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.

Staff accommodation, social housing, housing association and self catering units are included in the data, which covers all domestic property units owned by individuals, businesses and the States of Guernsey.

Businesses property units, which have a residential element (such as hotels, lodging houses, nursing or care homes) are not included in this data. However, domestic units in multiple occupancy (i.e. those occupied by a number of unrelated people, typically on separate tenancy agreements) are included.

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 stories.

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 detatched, semi-detatched 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 detatched, semi-detatched 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.

Open and Local Market Units

The Island’s housing stock is split into two categories: Open Market and Local Market and the Housing Control 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/fourparts*** for more information). The data in this bulletin only includes private and social housing units, so any references to Open Market units relate to Open Market Part A housing only.

Please see ***www.gov.gg/whocanliveandworkinguernsey*** for further information regarding who can occupy Open and Local Market housing on the Island.

8.1 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***. All Policy and Research Unit publications are available via ***www.gov.gg/pru***.

Please contact Helen Walton (Research Section Manager) for further information or to be added to the e-mailing list for any of the Policy and Research Unit publications.

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