Guernsey Annual Population Bulletin

31st March 2013 - Issue date 2nd May 2014

POLICY COUNCIL
THE STATES OF GUERNSEY

1.1 Introduction

The Guernsey Annual Population Bulletin provides information on population headcounts, demographics and change, as well as housing licences and projections. It is compiled using data provided by the States of Guernsey Social Security Department, Housing Department and the UK Government Actuary's Office. As far as possible, international age groupings and classifications have been used to assist comparability with other jurisdictions.

1.2 Headlines

- At the end of March 2013, Guernsey's population was 62,732 which was 353 people (0.6%) fewer than the previous year. The decline arose from net migration totalling -464 which was only partially offset by natural increase of 111.

- There were 4,872 live housing licences at the end of March 2013, compared to 4,858 at the same point the previous year, an increase of 14 licenses (0.3%).

- The median average age was 41 for males and 43 for females.

- There were 503 (1.2%) fewer people of working age (16 to 64 years old) in March 2013 than in March 2012, accounting for 66.1 % of the population in 2013 compared to 66.5% in 2012.

- The 0 to 15 years old age group also decreased, with 113 fewer people (1.1%) at the end of March 2013 than at the end of March 2012.

- The over 65 years age group increased by 263 people (2.4%).

- The population over 85 years of age (classified as the "oldest old") continued to represent 2.5% of the total population.

- Based on recent historic trends, the total population is projected to increase to approximately 69,000 by 2050, before levelling off. This is a lower figure than previously published, with a later peak, due to updates to projected life expectancies and fertility rates (see *Page 7* for further details).

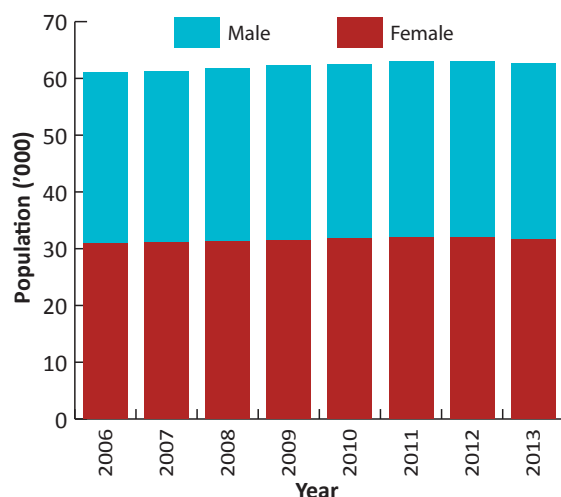### Figure 1.2.1: Total population (at 31st March)

Table 1.2.1: Total population (at 31st March)

	2008	2009	2010	2011	2012	2013
Males	30,405	30,777	30,695	31,025	31,147	31,081
Females	31,321	31,497	31,736	31,890	31,938	31,651
Total population	61,726	62,274	62,431	62,915	63,085	62,732
Annual natural increase	108	111	143	102	127	111
Annual net migration	443	437	14	382	43	-464
Annual change in population	551	548	157	484	170	-353
Annual % change in population	0.9	0.9	0.3	0.8	0.3	-0.6

Table 2.1.1: Total population at March 31st

	Total population	Annual change in population number	Annual % change in population number
2006	61,029	-	-
2007	61,175	146	0.2
2008	61,726	551	0.9
2009	62,274	548	0.9
2010	62,431	157	0.3
2011	62,915	484	0.8
2012	63,085	170	0.3
2013	62,732	-353	-0.6

Table 2.1.2: Births, deaths and natural increase during years ending March 31st

	Births	Deaths	Natural increase
2009	646	535	111
2010	656	513	143
2011	605	503	102
2012	674	547	127
2013	667	556	111

Table 2.1.3: Immigration, emigration and net migration during years ending March 31st

	Immigration	Emigration	Net migration
2009	5,297	4,860	437
2010	4,482	4,468	14
2011	4,631	4,249	382
2012	4,220	4,177	43
2013	3,845	4,309	-464

Figure 2.1.1: Immigration, emigration and net migration during years ending March 31st
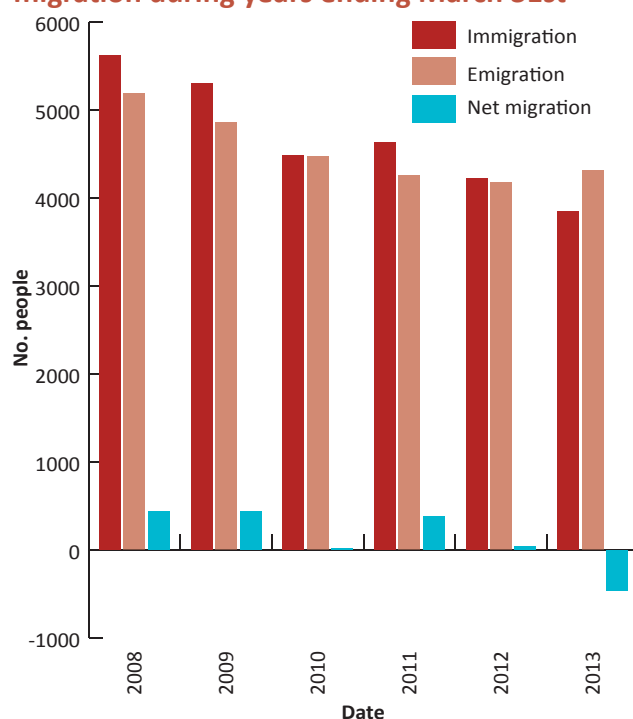
Population headcounts have been calculated by the Social Security Department using administrative records since 2006. Information on natural increase and net migration has been available since the year ending March 2008.

The total population decreased by 0.6% (353 people) to a total of 62,732 over the year ending 31st March 2013 (see *Table 2.1.1*). This annual decrease was the result of a natural increase of 111 people and a decrease of 464 people from net migration.

Natural increase in population is defined as the number of births minus the number of deaths during a particular time period. The natural increase has been relatively stable over the five years ending 2013, see *Table 2.1.2*.

Net migration is the difference between immigration (people moving to the island) and emigration (people moving off the island). For statistical purposes, an immigrant is defined as a person moving to Guernsey to work for any period of time or to live for a period of 26 weeks or more. An emigrant is defined as a person moving away from Guernsey to work for any period of time or to live for a period of 26 weeks or more. Emigrants and immigrants include residentially qualified people, people with a housing licence and their families, and people living in Open Market accommodation.

As shown in *Table 2.1.3* and *Figure 2.1.1*, over the year ending 31st March 2013, immigration further decreased compared to 2012. However, emigration was higher during the year ending 31st March 2013 than it had been the previous year and was also higher than immigration during the same year. This resulted in a negative net migration of 464, which contrasts with the positive net figures of previous years.

3.1 Annual demographics

Age and gender distribution pyramids can be used to track changes in the population demographic over time. ***Figure 3.1.1*** provides a comparison of the distribution in 2008 compared to five years later, in 2013.

Changes in the overall population demographic tend to develop over relatively long periods of time. The pyramid shows the effects of the 'baby boom' (after the second World War until the 1960s), with the bulge moving up out of the 40 to 44 group and into the 45 to 49 group. This bulge will move progressively further up the pyramid as the 'baby boom' generation gets older.

The growth in the 65-69 age group was more pronounced between 2008 and 2013 than it had been between 2007 and 2012. In the five years ending in 2013, this age group increased in size by 891 people (or 34.1%, compared to 22.4% over the five year period ending in 2012) as more of the baby boom generation reached retirement age.

Comparing the median age of the male and female populations gives an indication of the differences in the two demographic profiles. In March 2013, the median age (i.e. the age of the person in the middle if everyone was to be ranked in age order) was 41 for males and 43 for females (the same as in March 2012 and an increase of 1 year for each of the sexes since March 2011).

In March 2013, the male population was higher than the female in all age categories up to the age of 35 as a result of there typically being slightly more baby boys born than girls (see ***Table 3.1.1***). In almost all subsequent age categories the female population is higher than the male, due to the average life-span being longer for females than males. The threshold has moved upwards since 2008 when the male population was higher than the female in all age categories up to the age of 29.

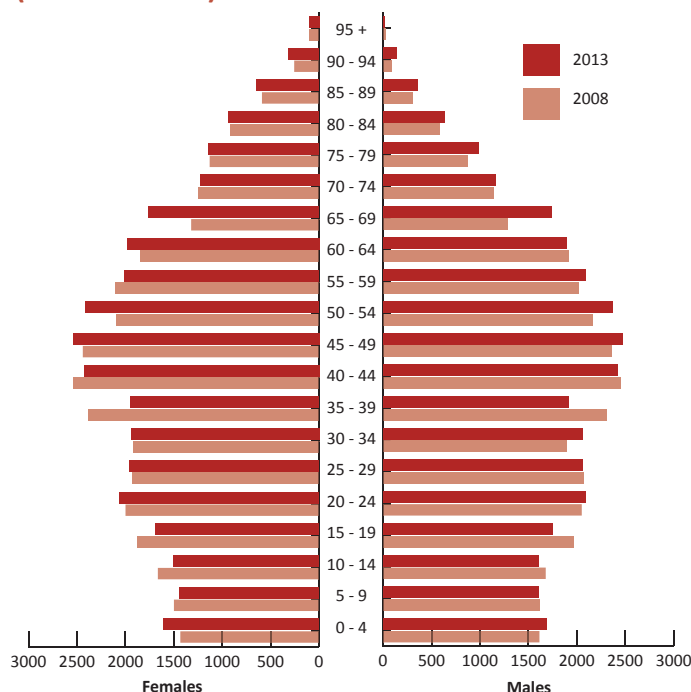**Figure 3.1.1: Age and gender distribution (at 31st March)**

Table 3.1.1: Age and gender distribution (at 31st March)

	2008			2013		
	Female	Male	Total	Female	Male	Total
0 - 4	1,433	1,614	3,047	1604	1687	3291
5 - 9	1,499	1,613	3,112	1445	1608	3053
10 - 14	1,665	1,679	3,344	1502	1608	3110
15 - 19	1,878	1,968	3,846	1686	1753	3439
20 - 24	1,999	2,051	4,050	2057	2091	4148
25 - 29	1,929	2,073	4,002	1961	2059	4020
30 - 34	1,926	1,891	3,817	1943	2055	3998
35 - 39	2,388	2,313	4,701	1950	1918	3868
40 - 44	2,543	2,457	5,000	2428	2419	4847
45 - 49	2,440	2,361	4,801	2542	2473	5015
50 - 54	2,096	2,161	4,257	2414	2375	4789
55 - 59	2,102	2,016	4,118	2010	2086	4096
60 - 64	1,851	1,913	3,764	1984	1899	3883
65 - 69	1,321	1,290	2,611	1759	1743	3502
70 - 74	1,246	1,141	2,387	1229	1165	2394
75 - 79	1,130	873	2,003	1138	983	2121
80 - 84	920	582	1,502	938	640	1578
85 - 89	590	303	893	644	360	1004
90 - 94	257	84	341	313	143	456
95 +	108	22	130	104	16	120
Total	31,321	30,405	61,726	31,651	31,081	62,732

4.1 Housing licences

Table 4.1.1: Live housing licences (at 31st March) - Essential employment related

	2009	2010	2011	2012	2013
Hostelry	134	132	112	121	107
Finance	423	440	417	412	394
Professional, business, scientific and technical	205	203	234	199	230
Public Administration	113	113	111	112	101
Education	228	238	231	219	224
Human health, social & charitable work	268	280	287	296	295
Other	227	213	212	252	229
Total	1,598	1,619	1,604	1,611	1,580

Table 4.1.2: Live housing licences (at 31st March) - Short-term employment related

	2009	2010	2011	2012	2013
Agriculture, horticulture, fishing and quarrying	107	114	169	114	100
Construction	249	181	141	191	299[2]
Wholesale, retail and repairs	256	181	484[1]	167	60
Hostelry	569	508	494	488	470
Finance	100	106	104	75	81
Other	335	331	260	260	291
Total	1,616	1,421	1,652[1]	1,295	1,301[2]

[1] Includes 324 licences issued to Waitrose fit-out staff and start-up teams working in the Island for a short period of time, which coincided with the data snapshot date, following Waitrose's acquisition of two large stores in the Island.

[2] Includes a number of guest workers involved in the airport pavements and runway rehabilitation project.

Table 4.1.3: Live housing licences (at 31st March) - Compassionate

	2009	2010	2011	2012	2013
"En famille" or one to one	1,341	1,345	1,324	1,237	1,252
Other	672	683	691	715	739
Total	2,013	2,028	2,015	1,952	1,991

At present, the principal means of managing population in Guernsey is through the administration of the Housing (Control of Occupation) (Guernsey) Law, 1994.

The Housing Department issues two main types of housing licences: (i) employment-related licences linked to a specific post of employment; (ii) non employment-related licences based on the length and strength of a person's connections with the Island.

All licences contain conditions relating to: (i) the local market accommodation that the licence holder may occupy; and (ii) the duration of the licence.

Tables 4.1.1, 4.1.2 and *4.1.3* provide a summary of the number of licence holders (not including their spouse/partner or dependants) who were living in the Island by virtue of different types of housing licence on 31st March of the years in question.

Tables 4.1.1 and *4.1.2* show the numbers of employment-related licence holders by employment sector and *Table 4.1.3* shows the numbers of non employment-related or compassionate licence holders.

The number of essential employment and compassionate licences have remained relatively stable between 2009 and 2013, following increases in numbers during earlier years.

The number of short-term employment-related housing licences is more liable to fluctuations due to specific events in the Island. For example, the establishment of Waitrose in Guernsey in 2011. After an upward trend between 2006 and 2009, the number of short-term licences reduced in 2012 and remained at a similar level in 2013.

Please see the Housing Department report: *Summary of Right to Work Documents* for further information and detail on live licences.

5.1 Quarterly changes

The quarterly population changes result from a combination of natural increase and net migration (see *Figure 5.1.1*).

Net migration in Guernsey tends to be higher in the spring and summer quarters than in the autumn and winter, due to the seasonal nature of some areas of the Guernsey economy. Natural increase (i.e. the number of births minus the number of deaths) shows less seasonality.

The highest level of natural increase in the period from the beginning of 2008 to 31st March 2013 was in the second quarter of 2011 when there were 71 more births than deaths. The lowest level of natural increase was in the first quarter of 2011 when there were 15 more deaths than births during the quarter.

The highest level of net migration during the same period occurred during the first quarter of 2008, when there were 744 more immigrants than emigrants. The lowest level of net migration, when 467 more people left the Island than moved to the Island, was during the fourth quarter of 2011.
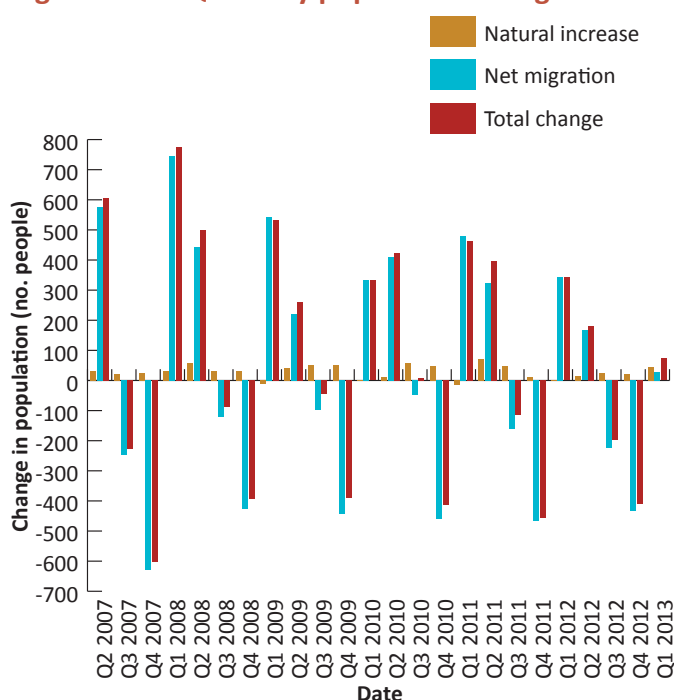
Figure 5.1.1: Quarterly population changes

Table 5.1.1: Quarterly population changes

		Births during quarter	Deaths during quarter	Natural increase during quarter	Immigration during quarter	Emigration during quarter	Net migration during quarter	Total population at end of quarter	Quarterly change in population number	Quarterly % change in population
2009	**Q1**	158	170	-12	1,364	820	544	62,274	532	0.9
2009	**Q2**	165	125	40	1,266	1,046	220	62,534	260	0.4
2009	**Q3**	180	128	52	1,187	1,284	-97	62,489	-45	-0.1
2009	**Q4**	172	120	52	860	1,302	-442	62,099	-390	-0.6
2010	**Q1**	139	140	-1	1,169	836	333	62,431	332	0.5
2010	**Q2**	129	117	12	1,392	981	411	62,854	423	0.7
2010	**Q3**	181	124	57	1,102	1,150	-48	62,863	9	0.0
2010	**Q4**	164	116	48	831	1,291	-460	62,451	-412	-0.7
2011	**Q1**	131	146	-15	1,306	827	479	62,915	464	0.7
2011	**Q2**	191	120	71	1,362	1,037	325	63,311	396	0.6
2011	**Q3**	170	123	47	1,042	1,202	-160	63,198	-113	-0.2
2011	**Q4**	158	146	12	710	1,177	-467	62,743	-455	-0.7
2012	**Q1**	155	158	-3	1,106	761	345	63,085	342	0.5
2012	**Q2**	154	138	16	1,147	981	166	63,267	182	0.3
2012	**Q3**	179	153	26	959	1,184	-225	63,068	-199	-0.3
2012	**Q4**	164	141	23	706	1,138	-432	62,659	-409	-0.6
2013	**Q1**	170	124	46	1,033	1,006	27	62,732	73	0.1

6.1 Dependency ratio

Table 6.1.1: Dependency ratio (at 31st March)

	Dependency ratio
2008	0.48
2009	0.48
2010	0.48
2011	0.48
2012	0.50
2013	0.51

Figure 6.1.1: Population by age group (at 31st March)
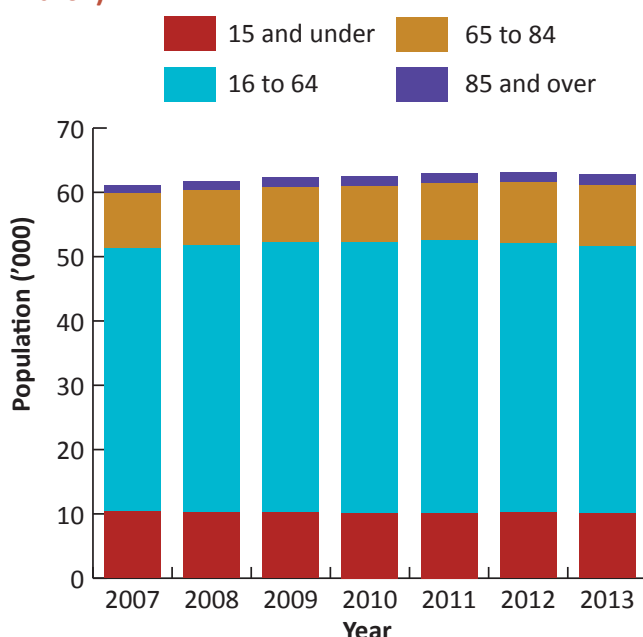
Table 6.1.2: Population by age group (at 31st March)

	15 and under	16 - 64	65 - 84	85 and over	Total
2008	10,191	41,668	8,503	1,364	61,726
2009	10,235	42,015	8,600	1,424	62,274
2010	10,161	42,044	8,740	1,486	62,431
2011	10,151	42,378	8,871	1,515	62,915
2012	10,210	41,963	9,340	1,572	63,085
2013	10,097	41,460	9,595	1,580	62,732

Table 6.1.3: Percentage of population by age group (at 31st March)

	15 and under (%)	16 - 64 (%)	65 - 84 (%)	85 and over (%)	Total (%)
2008	16.5	67.5	13.8	2.2	100
2009	16.4	67.5	13.8	2.3	100
2010	16.3	67.3	14.0	2.4	100
2011	16.1	67.4	14.1	2.4	100
2012	16.2	66.5	14.8	2.5	100
2013	16.1	66.1	15.3	2.5	100

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

Dependency ratios are used to indicate the proportion of a population which is economically dependent i.e. those who are eligible for retirement (over 65 years of age) and those who are still in compulsory full-time education (children aged 15 years and under).

The ratios (see *Table 6.1.1*) are calculated by dividing the number of individuals in the dependent age categories by the number of people in the working age category.

Trends in dependency ratios over time (and projected into the future) are used to assess, for example, the social insurance contribution rates required from the economically active in order to support the economically dependant.

In 2013, the overall dependency ratio was 0.51, which means that for every 100 people of working age (between the ages of 16 and 64) there were 51 people of dependant age, which is one more than in 2012. Prior to 2012, the ratio had remained at 0.48 for the four years from 2008 to 2011.

The age groups presented in *Figure 6.1.1* and *Tables 6.1.2* and *6.1.3* are used to show the population of working age compared with those of dependant age. The 85 and over category is used to highlight the number of "oldest old"; a portion of the population of particular interest when monitoring the ageing of a population and the associated policy implications.

Over the year ending March 2013, the youngest members of the population (those aged 0-15) decreased in number by 1.1% whilst the oldest members of the population (those aged 85 and over) increased in number by 0.5%. The number of people of working age (16-64 years) decreased by 1.2%. The proportion of people aged 65-84 years increased by 2.7% over the year ending March 2013 (compared with an increase of 5.3% over the year ending March 2012).

The proportion of people in the dependent age categories was 33.9% in 2013 compared with 32.5% in 2008.

7.1 Projections - best match model

Population projections are produced periodically by the UK Government Actuary's Department[1] (GAD), primarily for the purpose of actuarial review of the Guernsey Insurance Fund for the Social Security Department. For more information on the methodology, , please see *page 8*.

The projections shown in *Figure 7.1.1* and *Table 7.1.1* (which were updated by GAD in April 2014) forecast the total population increasing gradually to about 69,000 in 2050.

The peak is forecast to be lower (by approximately 1,500 people) than in previous projections and also later (by 5 years). The changes result from reductions in projected life expectancies for males and females and also from changes to fertility rates (with projected reductions in fertility rates of lower age females but increases in fertility rates of older females).

The peak is primarily a result of the ageing of the baby boom generation. The population is projected to level off and decline from 2055 onwards.

The proportion of people under 15 is projected to fall from 16.1% of the total population in 2013 to 13.4% in 2070 (see *Table 7.1.2*). The proportion of people aged 16 to 64 is also projected to decrease (from 66.1% to 55.1%), whilst the number of people aged over 65 is projected to increase (from 17.8% to 33.5%).

The result is a projected dependency ratio of 0.82 by 2070 (i.e. 82 dependants for every 100 people aged 16 to 64). However, between the years 2020 and 2032, the pension age will be gradually increased from 65 to 67, which reduces the projected dependency ratio to 0.75 in 2070. Both versions of the ratio are shown in *Table 7.1.3*.

The dependency ratios are projected to be lower than those presented in the last edition of this bulletin, primarily due to the projections for the 65 and over age group being lower than before.

[1] For more information see www.gad.gov.uk

Figure 7.1.1: Projected population by age group
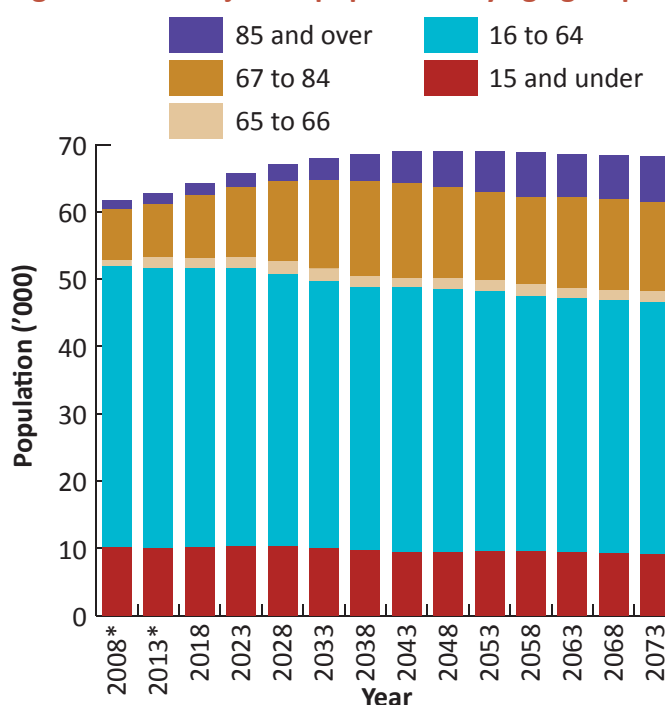
*Actual, rather than projected, population figures.

Table 7.1.1: Projected population by age group

	15 and under	16 - 64	65 - 84	85 and over	Total
2020	10,264	41,351	11,357	1,946	64,918
2030	10,151	40,209	14,435	2,721	67,516
2040	9,593	39,056	15,819	4,285	68,754
2050	9,495	38,935	14,870	5,771	69,070
2060	9,502	37,750	14,875	6,647	68,775
2070	9,186	37,613	14,942	6,581	68,323

Table 7.1.2: Projected percentage of population by age group

	15 and under (%)	16 - 64 (%)	65 - 84 (%)	85 and over (%)	Total (%)
2020	15.8	63.7	17.5	3.0	100
2030	15.0	59.6	21.4	4.0	100
2040	14.0	56.8	23.0	6.2	100
2050	13.7	56.4	21.5	8.4	100
2060	13.8	54.9	21.6	9.7	100
2070	13.4	55.1	21.9	9.6	100

Table 7.1.3: Projected dependency ratios

	Dependency ratio (with working age group 16 - 64)	Dependency ratio (with working age group 16 - 66)
2020	0.57	0.52
2030	0.68	0.62
2040	0.76	0.69
2050	0.77	0.70
2060	0.82	0.74
2070	0.82	0.75

8.1 Methodology and further information

Headcounts

Population headcounts are calculated by the Social Security Department using administrative records. All individuals who are employed in Guernsey or who are resident for longer than 26 weeks are required to register with the Department. The data is cross referenced with information provided by the Education Department in order to calculate a headcount at the end of each quarter.

This data has been available on an annual basis since March 2006 and quarterly since March 2007. Prior to this, population figures were calculated using data collected by census every 5 or ten years; the last census was held in 2001. However, due to the different method and count date, the figures produced by the two methodologies are not directly comparable.

Following a States decision (see *Billet d'Etat XVII, 2010*, available via *www.gov.gg/billets*), a census was not held in Guernsey in 2011. The Policy and Research Unit is instead working on developing an electronic alternative, which will utilise existing administrative sources. The intention is to expand upon the information already published in this bulletin in order to provide more of the information traditionally collected via a census, such as population by parish.

Complementary information on the Island's housing stock, including household tenures and distribution by parish, is available in the *Guernsey Annual Housing Stock Bulletin*, via *www.gov.gg/property*.

Projections

Population projections are provided periodically by the UK Government Actuary's Department (GAD) primarily for the purpose of actuarial review of the Guernsey Insurance Fund for the Social Security Department. The projections were updated in 2011 and again in 2014. A range of projection models are produced by the actuaries during each review to reflect different potential migration scenarios. Other assumptions are also used in the calculations (e.g. regarding fertility and mortality rates) and these are updated during each review.

Each year the Policy and Research Unit assesses which of the models offers the best match in light of any changes to actual data trends or circumstances, including changes to States policy or legislation which will affect the population level (for example, changes to immigration controls).

This year (as per the last four years), the model based on a long-term assumption of plus 200 net inward migration per annum best matched recent historic data trends, so is taken to be the most likely in terms of future trends (and is presented on *page 7*). However, please note that the projected population numbers presented in this bulletin differ to those previously presented, since in April 2014 the GAD updated the various assumptions used (e.g. regarding fertility and mortality rates) and recalculated the projections.

9.1 Contact details

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