POLICY COUNCIL
THE STATES OF GUERNSEY

Guernsey Annual Electronic Census Report 31st March 2015

Population snapshots, trends and forecasts

Contents

1.1 Introduction

This second Guernsey Annual Electronic Census Report, published on 1st February 2016, provides information on the population of Guernsey (including the islands of Guernsey, Herm, Lihou and Jethou). It includes a detailed snapshot of the demographics, spatial distribution and housing situation of the population on 31st March 2015. It also contains basic demographic historic trends and projections (provided by the UK Government Actuary's Office). Census Reports were historically published every five or ten years, but this Report is published annually with updates in between in the quarterly Population Bulletin.

The information in this report is sourced from ten separate States of Guernsey databases (from seven different Departments) and is collated using the Rolling Electronic Census IT system; a pioneering and cost saving project, which was completed in December 2014. Earlier information was provided by the Social Security Department and was sourced from two of the databases now linked to the Rolling Electronic Census IT system. More information on the Rolling Electronic Census Project is available at the end of this Report.

This Report contains some new information on economic status, details of which are also collated via the Rolling Electronic Census. The intention is to publish more comprehensive economic activity information in an expanded version of the Quarterly Labour Market Bulletin in future (see ***www.gov.gg/lmb***).

As far as possible, international age groupings and classifications have been used to assist comparability with other jurisdictions. Direct comparisons are not made with previous census results in this Report, due to the different methodologies used, but figures have been presented in a manner such that they can be compared.

Contact details are included at the end of this report if you would like further information.

1.2 Headlines

- At the end of March 2015, Guernsey's population was 62,612.

- There was a natural increase of 62 people and a net migration of minus 24 people over the year ending in March 2015, giving a total increase of 38 people (0.1%).

- In March 2015, the dependency ratio was 0.54, which means that for every 100 people of working age (between the ages of 16 and 64) there were 54 people of dependent age. This compares to a ratio of 0.48 in 2010.

- 29.7% of the population lived in St. Peter Port; the most highly and densely populated parish.

- 90.9% of the population lived in Local Market housing units and 8.0% lived in Open Market units (the address was unknown for the remaining small portion of the population).

- 81.7% of the working age population (aged 16 to 64 years old) were either in full-time education, employed or self-employed at the end of March 2015.

- Based on recent historic trends, the total population is projected to increase to between 65,400 and 68,800 people in 2040 and the dependency ratio is projected to increase to between 0.76 and 0.80.
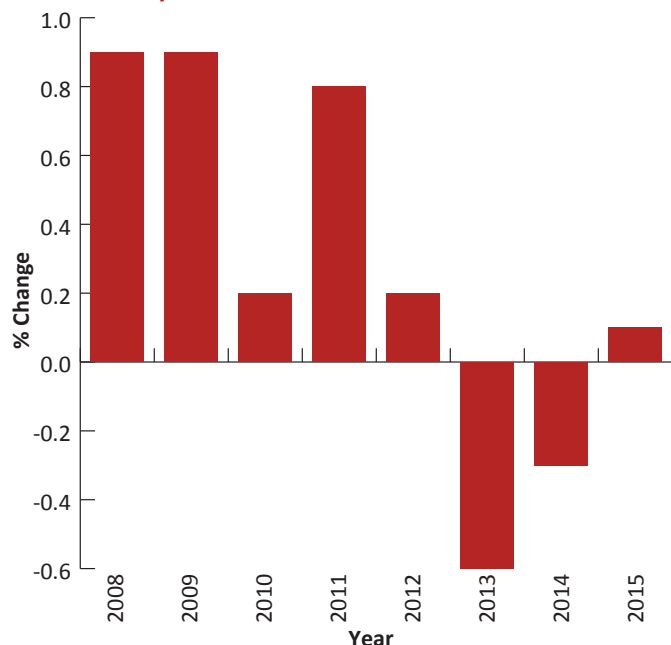
2.1 Total population trends

Table 2.1.1: Total population (at 31st March)

	Total population	Annual change due to net migration and natural increase	Annual % change due to net migration and natural increase	Annual change due to admin changes	Annual % change due to admin changes
2007	61,139	-	-	-	-
2008	61,688	549	0.9	-	-
2009	62,236	548	0.9	-	-
2010	62,390	154	0.2	-	-
2011	62,878	488	0.8	-	-
2012	63,033	155	0.2	-	-
2013	62,675	-358	-0.6	-	-
2014	62,576	-174	-0.3	75	0.1
2015	62,612	38	0.1	-2	-0.0

Figure 2.1.1: Total population (at 31st March)
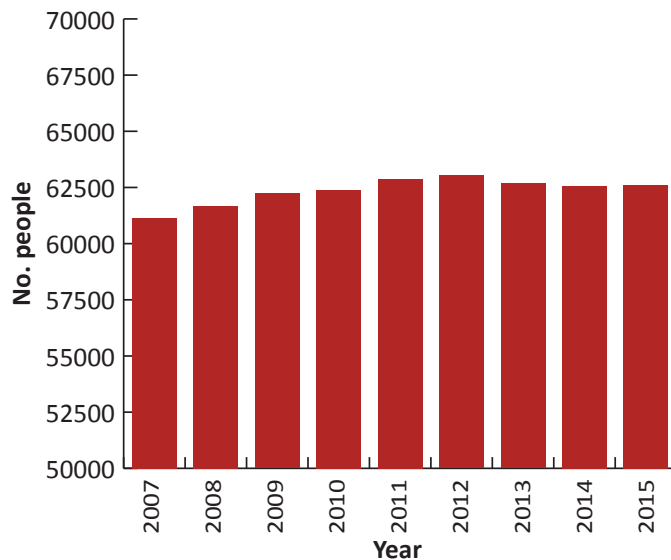
Figure 2.1.2: Total population change due to net migration and natural increase (over years ending 31st March)

Population headcounts were calculated by the Social Security Department using administrative records for March 2006 to March 2014. The Rolling Electronic Census system was also used to calculate the headcount in March 2014 to enable a cross check and a transition over. More recent information is also sourced from the Rolling Electronic Census.

The total population increased by 0.1% (38 people), due to net migration and natural increase, over the year ending 31st March 2015 (see *Table 2.1.1*).

As a result of the additional information used by the Rolling Electronic Census system (as explained in *Section 10.1*), increasing the reliability of the figures, some previously published figures have been restated. The figures have been restated to enable population changes that have been identified retrospectively to be incorporated into the correct year.

Changes to the population headcount due to methodological differences (introduced between 2013 and 2014) and not due to natural increase or net migration (such as the removal of duplicate records) are referred to as "net administrative changes" throughout this report. See *Section 10.1* for more information on administrative changes.

With administrative changes included, the population was 62,612 on 31st March 2015.

2.2 Births, deaths and natural increase

Information on natural increase has been available from the Social Security Department since the year ending in March 2008. It has been calculated using the Rolling Electronic system from March 2015 onwards.

Natural increase in population is defined as the number of births minus the number of deaths during a particular time period. The natural increase for the seven years ending in March 2015 is shown in *Table 2.2.1*.

During the year ending in March 2015, there were 624 births and 562 deaths, giving a natural increase of 62, the lowest for several years, due to a combination of lower numbers of births and higher numbers of deaths.

Natural increase over the five years ending in March 2015 was 517 compared with 602 over the five year period ending in March 2014.

Table 2.2.1: Births, deaths and natural increase (during years ending 31st March)

	Births	Deaths	Natural increase
2008	603	495	108
2009	646	535	111
2010	660	513	147
2011	608	503	105
2012	675	547	128
2013	673	556	117
2014	631	526	105
2015	624	562	62

Figure 2.2.1: Births, deaths and natural increase (during years ending 31st March)
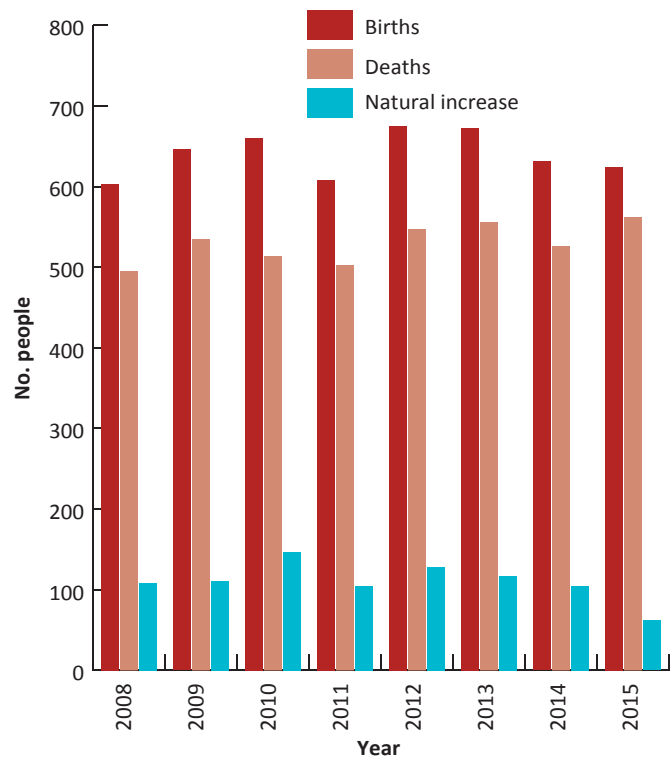
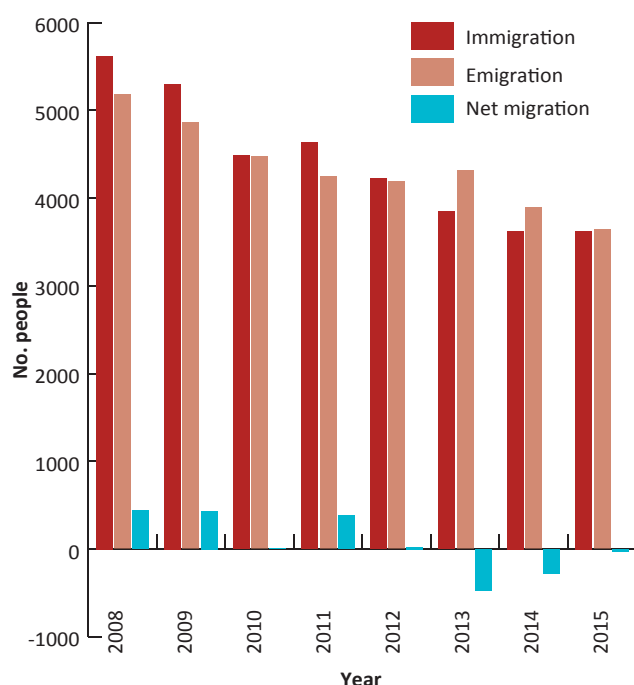**Table 2.2.2: Births, deaths and natural increase during five year periods ending 31st March**

	Births	Deaths	Natural increase
2013	3,262	2,654	608
2014	3,247	2,645	602
2015	3,211	2,694	517

2.3 Immigration, emigration and net migration

Table 2.3.1: Immigration, emigration and net migration (during years ending 31st March)

	Immigration	Emigration	Net migration
2008	5,622	5,181	441
2009	5,300	4,863	437
2010	4,484	4,477	7
2011	4,633	4,250	383
2012	4,225	4,198	27
2013	3,848	4,323	-475
2014	3,624	3,903	-279
2015	3,624	3,648	-24

Figure 2.3.1: Immigration, emigration and net migration (during years ending 31st March)

Information on net migration has been available from the Social Security Department since the year ending in March 2008. It has been calculated using the Rolling Electronic system from March 2015 onwards.

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 2.3.1* and *Figure 2.3.1*, levels of both immigration and emigration have shown a generally downward trend since 2008.

Emigration exceeded immigration during the years ending in March 2013, March 2014 and March 2015.

Over the year ending on 31st March 2015, the number of immigrants was 3,624 compared with 3,648 emigrants, giving a net migration of minus 24. The total net migration over the five year period ending in March 2015 was minus 368 people compared with minus 337 over the five years ending in March 2014.

Table 2.3.2: Immigration, emigration and net migration (during five year periods ending 31st March)

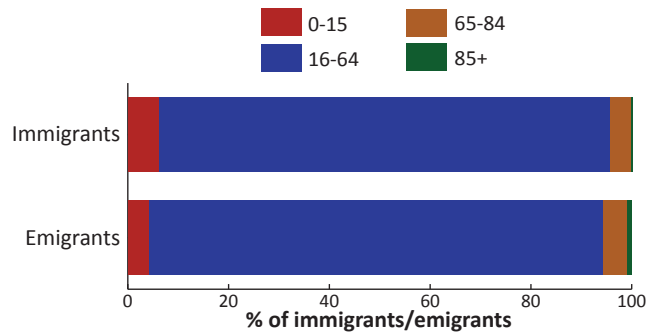|	Immigration	Emigration	Net migration
2013	22,490	22,111	379
2014	20,814	21,151	-337
2015	19,954	20,322	-368

2.4 Immigration and emigration - details

Now that Electronic Census data is available over a full year, information on the profile of immigrants and emigrants can be analysed. Approximately one third of the total were people that immigrated and then emigrated within the year or vice versa.

As can be seen in *Figure 2.4.1*, the majority of both immigrants and emigrants during the year ending March 2015 (89.6% and 90.1% respectively) were of working age i.e. between 16 and 64 years of age (inclusive).

Tables 2.4.1 and *2.4.2* show immigrants to and emigrants from the island broken down by age group and gender. The ratio of females to males is similar for both immigrants and emigrants. Of the immigrants during the year ending March 2015, 46.3% were female compared with 47.0% of emigrants.

The intention is to track trends in this information over the coming years.

Figure 2.4.1: Immigration and emigration by age (during the year ending 31st March 2015)

Table 2.4.1: Immigration by age and gender (during the year ending 31st March 2015)

			% of immigrants
	Female	Male	Total
0-15	3.3	2.8	6.1
16-64	41.2	48.4	89.6
65-84	1.7	2.3	4.0
85+	0.2	0.2	0.4
Total	46.3	53.7	100.0

Table 2.4.2: Emigration by age and gender (during the year ending 31st March 2015)

			% of emigrants
	Female	Male	Total
0-15	2.5	1.6	4.1
16-64	41.9	48.2	90.1
65-84	2.0	2.9	4.9
85+	0.5	0.3	0.8
Total	47.0	53.0	100.0

Table 2.4.3: Immigration and emigration by length of stay (during the year ending 31st March 2015)

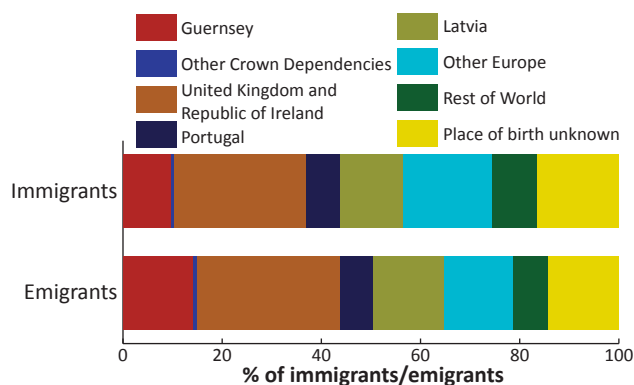|	% of immigrants	% of emigrants
New to the island	62.7	N/A
Less than 1 year	6.1	31.5
1 to less than 5 years	11.6	31.8
5 to less than 10 years	4.8	10.4
10 to less than 15 years	2.9	4.4
15 to less than 20 years	4.4	5.1
Over 20 years	7.5	16.8

Figure 2.4.2: Immigration and emigration by length of stay (during the year ending 31st March 2015)
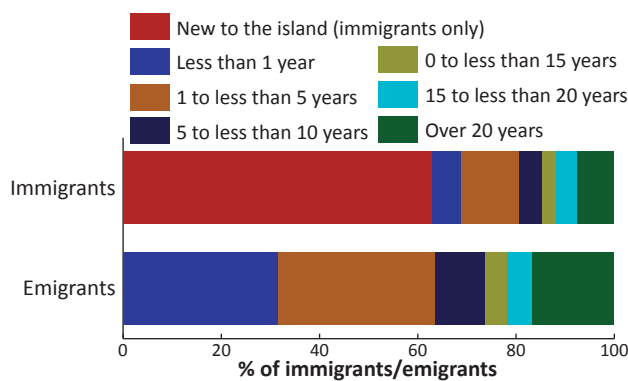
Table 2.4.4: Immigration and emigration by country of birth (during the year ending 31st March 2015)

	% of immigrants	% of emigrants
Guernsey	9.5	14.0
Other Crown Dependencies	0.7	0.8
United Kingdom and Republic of Ireland	26.6	29.0
Portugal	7.0	6.6
Latvia	12.7	14.2
Other Europe	17.9	14.0
Rest of World	9.1	7.0
Place of birth unknown	16.5	14.4

Figure 2.4.3: Immigration and emigration by country of birth (during the year ending 31st March 2015)

The length of time a person has been resident on the island for can be calculated using the Rolling Electronic Census system. *Table 2.4.3* and *Figure 2.4.2* show immigrants to and emigrants from the island broken down by their length of stay on the island, as at the start of the quarter during which they left (emigrated) or as at the end of the quarter during which they arrived (immigrated).

The length of stay could be from one continuous stay or more than one separate stay. These figures should be viewed as minimum lengths of stay, since historic information is available from 1992 onwards only (so any stays prior to 1992 would not be included).

The majority (62.7%) of immigrants who arrived during the year ending March 2015 were new to the island. 7.5% had previously been on the island for more than twenty years.

31.5% of the emigrants had been in Guernsey for less than one year. 16.8% of people emigrating had spent twenty years or more in Guernsey prior to leaving during the year ending March 2015.

There is 85% coverage for place of birth information, which is sourced from the Housing, Health & Social Services and Environment Departments. The coverage of this information is evenly distributed across the population, so the percentages presented here are considered reliable for the whole population. (See *Page 12* for more information about country of birth.)

Table 2.4.4 and *Figure 2.4.3* show information about the country of birth for people who have either immigrated to Guernsey or emigrated from the island.

The highest percentage of both immigrants and emigrants were born in the United Kingdom or Republic of Ireland (26.6% and 29.0% respectively).

Population headcount by gender has been calculated by the Social Security Department since March 2006. It is calculated using the Rolling Electronic system for March 2014 onwards.

The female population has consistently been higher than the male population since 2006, ranging between 50.9% to 50.4% of the total population. In March 2015, females constituted 50.4% of the population and males constituted 49.6%.

As shown in *Table 3.1.1* and *Figure 3.1.1*, the male and female populations have both increased in the nine years since 2006. During that time, the male population grew by more than the female population, with increases of 1,014 (3.4%) and 605 (2.0%) respectively. In the year ending March 2015, the male population increased by 91 (0.3%), whilst the female population decreased by 55 (0.2%).

There are typically more baby boys born than girls, but the average life-span for females is longer than for males. These effects, combined with population changes due to migration, all impact on the gender make-up of the population.

More information on the age profiles of the male and female populations is provided on *Page 10*.

Table 3.1.1: Total population by gender (at 31st March)

	Females	Males	Annual % change in female population	Annual % change in male population
2006	30,979	30,014	-	-
2007	31,138	30,001	0.5	0.0
2008	31,306	30,382	0.5	1.3
2009	31,482	30,754	0.6	1.2
2010	31,721	30,669	0.8	-0.3
2011	31,875	31,003	0.5	1.1
2012	31,917	31,116	0.1	0.4
2013	31,625	31,050	-0.9	-0.2
2014	31,639	30,937	0.0	-0.4
2015	31,584	31,028	-0.2	0.3

Figure 3.1.1: Total population by gender (at 31st March)
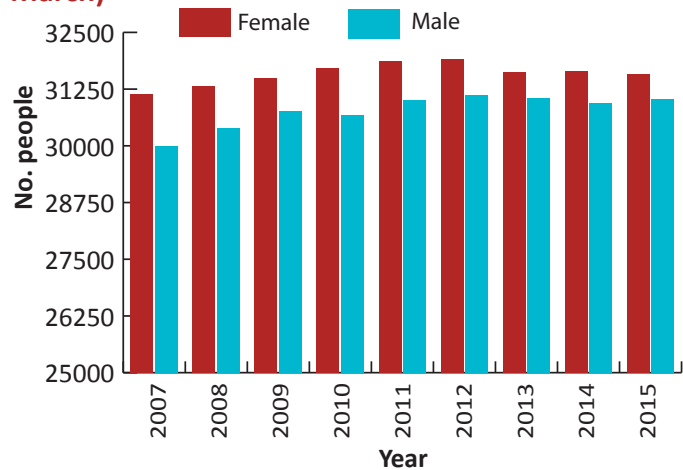
Figure 3.1.2: Total population change by gender (over years ending 31st March)
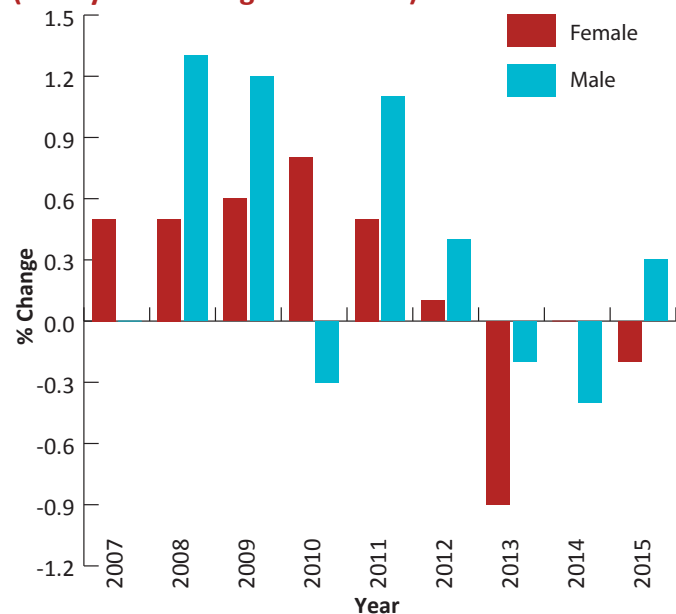
4.1 Age group trends

Figure 4.1.1: Population by age group (at 31st March)

Population headcount by age group has been calculated by the Social Security Department since March 2006 (although it is only possible to report these particular groups from 2007 onwards). It is calculated using the Rolling Electronic system for March 2014 onwards.
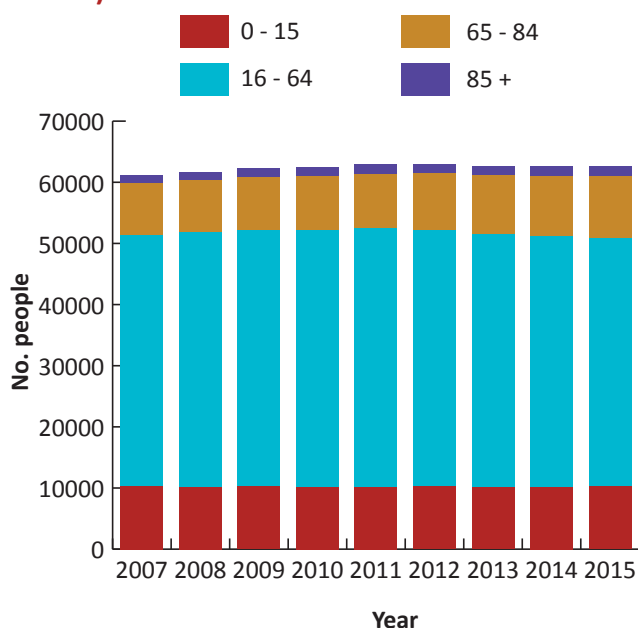
The age groups presented in *Figure 4.1.1* and *Tables 4.1.1* and *4.1.2* are used to show the population of working age compared with those of dependent age. The 85 and over category is used to highlight the number of "oldest old"; a portion of the population of particular interest when monitoring the ageing of a population and the associated policy implications.

Over the year ending in March 2015, the youngest group of the population (those aged 0 to 15) increased in number by 0.3%. The oldest group of the population (those aged 85 and over) decreased by 0.3%. The group aged 65 to 84 years of age increased by 2.4%. The number of people of working age (aged 16 to 64 years) decreased by 0.6%.

The size of the working age population was lower in March 2015 than it had been five years earlier, in March 2010, despite the overall population having increased during the period. This is likely due to migration during the period.

The proportion of people in the dependent age categories was 35.0% in 2015 compared with 32.6% in 2010.

More information on dependency ratios is provided on the *opposite page*.

Table 4.1.1: Population by age group (at 31st March)

	0 -15	16 - 64	65 - 84	85 +	Total
2008	10,166	41,659	8,499	1,364	61,688
2009	10,210	42,004	8,598	1,424	62,236
2010	10,141	42,023	8,740	1,486	62,390
2011	10,140	42,352	8,871	1,515	62,878
2012	10,210	41,912	9,339	1,572	63,033
2013	10,110	41,391	9,593	1,581	62,675
2014	10,187	40,946	9,831	1,612	62,576
2015	10,216	40,718	10,071	1,607	62,612

Table 4.1.2: Percentage of population by age group (at 31st March)

	0 - 15	16 - 64	65 - 84	85 +	Total
2008	16.5	67.5	13.8	2.2	100
2009	16.4	67.5	13.8	2.3	100
2010	16.3	67.4	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	66.0	15.3	2.5	100
2014	16.3	65.4	15.7	2.6	100
2015	16.3	65.0	16.1	2.6	100

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

4.2 Dependency ratio trends

Dependency ratios are used to indicate the proportion of a population which is potentially 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 4.2.1*) 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 dependent.

In 2015, the overall dependency ratio was 0.54, which means that for every 100 people of working age (between the ages of 16 and 64) there were 54 people of dependent age, which is one more than in 2014 and three more than in 2013.

Prior to 2012, the ratio had remained at 0.48 for the four years from 2008 to 2011. However, as more and more of the "baby boom" generation (babies born after the second World War until the 1960s) move from the working age category into the retirement age category, this proportion can be seen to increase.

A more detailed picture of the baby boom and its impact on the island's demographic profile can be seen *overleaf*. Projections for the dependency ratio, including the effects of increasing the retirement age, are provided on *page 22*.

Table 4.2.1: Dependency ratio (at 31st March)

	Dependency ratio
2009	0.48
2010	0.48
2011	0.48
2012	0.50
2013	0.51
2014	0.53
2015	0.54

Figure 4.2.1: Dependency ratio (at 31st March 2009)

- Working age population
- Dependent age population
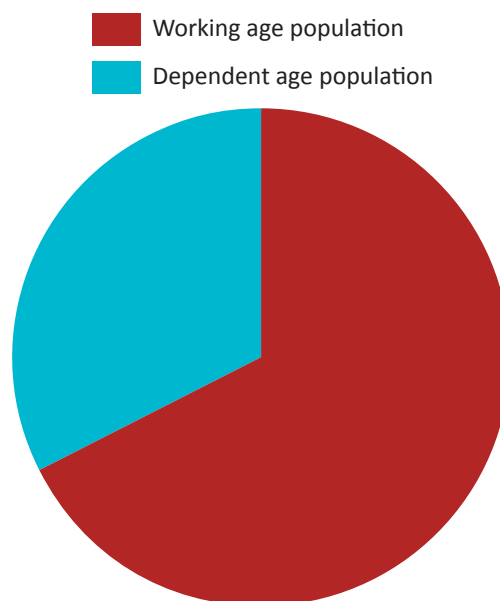
Figure 4.2.2: Dependency ratio (at 31st March 2015)

- Working age population
- Dependent age population
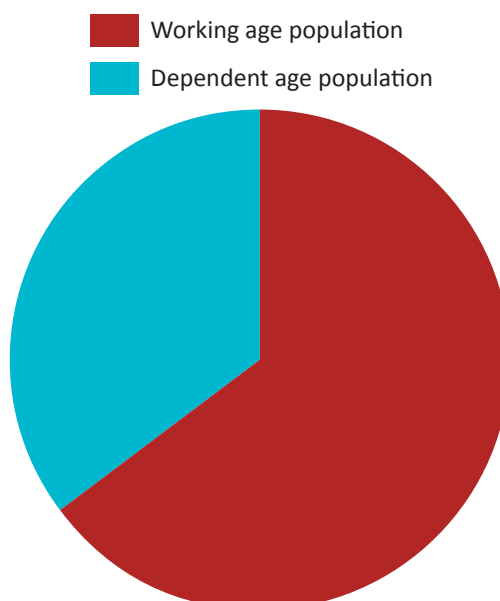
4.3 Gender and age trends

Figure 4.3.1: Age and gender distribution (at 31st March)
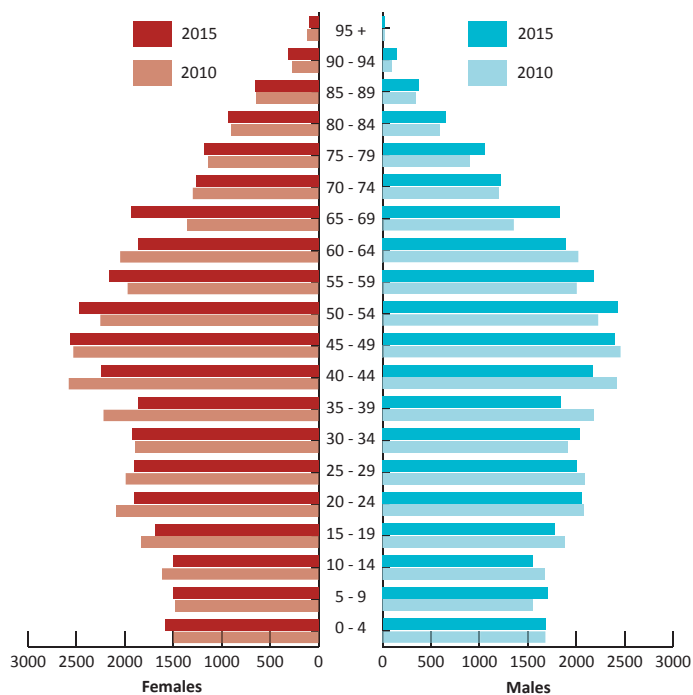
Table 4.3.1: Age and gender distribution (at 31st March)

	2010			2015		
	Female	**Male**	**Total**	**Female**	**Male**	**Total**
0 - 4	1,497	1,681	3,178	1,584	1,683	3,267
5 - 9	1,482	1,549	3,031	1,499	1,706	3,205
10 - 14	1,617	1,673	3,290	1,503	1,553	3,056
15 - 19	1,831	1,879	3,710	1,693	1,782	3,475
20 - 24	2,083	2,072	4,155	1,909	2,061	3,970
25 - 29	1,992	2,086	4,078	1,909	2,005	3,914
30 - 34	1,893	1,908	3,801	1,924	2,040	3,964
35 - 39	2,221	2,183	4,404	1,864	1,844	3,708
40 - 44	2,582	2,418	5,000	2,247	2,167	4,418
45 - 49	2,533	2,457	4,990	2,565	2,393	4,958
50 - 54	2,254	2,226	4,480	2,478	2,426	4,904
55 - 59	1,972	2,005	3,977	2,162	2,179	4,341
60 - 64	2,049	2,021	4,070	1,863	1,895	3,758
65 - 69	1,353	1,355	2,708	1,941	1,830	3,771
70 - 74	1,299	1,204	2,503	1,260	1,216	2,476
75 - 79	1,136	895	2,031	1,182	1,053	2,235
80 - 84	904	594	1,498	934	655	1,589
85 - 89	642	347	989	655	372	1,027
90 - 94	268	90	358	317	143	460
95 +	113	26	139	95	25	120
Total	31,721	30,669	62,390	31,584	31,028	62,612

Age and gender distribution pyramids can be used to track changes in the population demographic over time. *Figure 4.3.1* provides a comparison of the distribution in 2010 compared with five years later, in 2015.

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 35 to 64 age groups and into the 40 to 69 groups. This bulge will move progressively further up the pyramid as the baby boom generation gets older.

The growth in the 65 to 69 age group and the decline in the 35 to 39 are quite pronounced in *Figure 4.3.1*.

Comparing the median age of the male and female populations gives an indication of the differences in the two demographic profiles. In March 2015, the median age (i.e. the age of the person in the middle if everyone was to be ranked in age order) was 42 for males and 44 for females (an increase of 2 years for each of the sexes since March 2010).

In March 2015, the male population was higher than the female population 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 4.3.1*). 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.

A table of the population by individual age year is available in a spreadsheet format from *www.gov.gg/population*.

5.1 Length of stay on the island to date

The length of time a person has been resident on the island for can be calculated using the Rolling Electronic Census system. The length of stay could be from one continuous stay or more than one separate stay. These figures should be viewed as minimum lengths of stay, since historic information is available from 1992 onwards only (so any stays prior to 1992 would not be included).

It can be seen in *Figure 5.1.1* and *Table 5.1.1* that over half (58.2%) of the population has been resident for over twenty years.

The maximum length of time a person can have been resident for is restricted by their age. However, persons in age categories of 20 upwards could achieve a 20-year stay. Of these categories, the 35 to 39 years of age category contains the lowest proportion of people that have been resident for over 20 years, at 55.3%.

A person's length of stay may also be influenced by their housing document type. Information on length of stay by housing document type is provided in *Section 5.3*.

Table 5.1.1: Length of stay by age (at 31st March 2015)

	Less than 1 year	1 to less than 5 years	5 to less than 10 years	10 to less than 15 years	15 to less than 20 years	Over 20 years	Total
0 - 4	699	2,568	-	-	-	-	3,267
5 - 9	54	246	2,905	-	-	-	3,205
10 - 14	39	138	245	2,634		-	3,056
15 - 19	120	123	164	153	2,915	-	3,475
20 - 24	309	400	144	116	64	2,937	3,970
25 - 29	336	593	330	92	81	2,482	3,914
30 - 34	213	533	463	270	198	2,287	3,964
35 - 39	154	369	402	379	355	2,049	3,708
40 - 44	129	328	392	412	505	2,648	4,414
45 - 49	101	319	393	410	465	3,270	4,958
50 - 54	97	232	304	336	357	3,578	4,904
55 - 59	67	173	191	247	251	3,412	4,341
60 - 64	31	86	111	145	189	3,196	3,758
65 - 69	18	50	77	104	192	3,330	3,771
70 - 74	1	28	53	68	127	2,199	2,476
75 - 79	6	14	31	42	82	2,060	2,235
80 - 84	2	13	19	18	50	1,487	1,589
85 - 89	2	11	11	15	17	971	1,027
90 - 94	3	6	2	6	11	432	460
95 +	-	-	2	2	4	112	120
Total	2,381	6,230	6,239	5,449	5,863	36,450	62,612

Figure 5.1.1:Length of stay by age as a percentage of population by age group (at 31st March 2015)
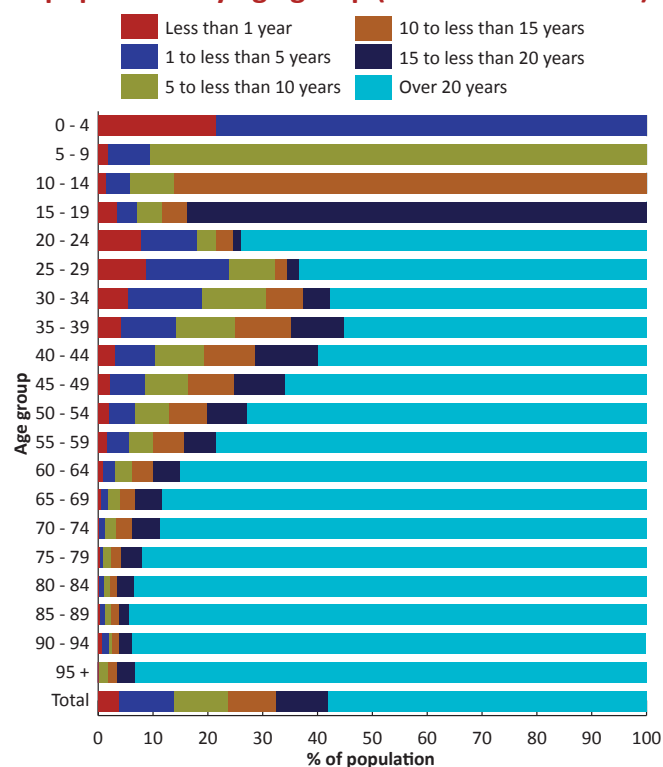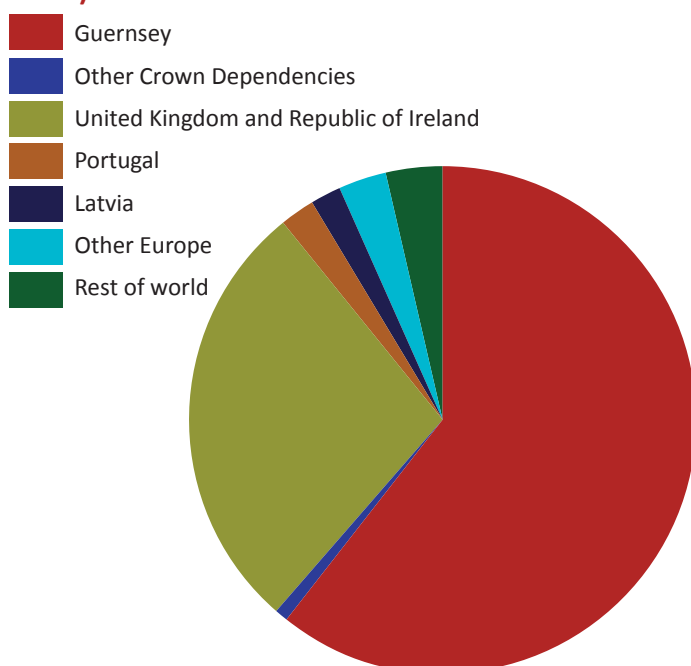
Table 5.2.1: Country of birth (at 31st March 2015)

	No. people	% of total population	% of people with known country of birth
Guernsey	32,489	51.9	60.8
Other Crown Dependencies	403	0.6	0.8
United Kingdom and Republic of Ireland	14,749	23.6	27.6
Portugal	1,235	2.0	2.3
Latvia	1,004	1.6	1.9
Other Europe	1,691	2.7	3.2
Rest of world	1,860	3.0	3.5
Place of birth unknown	9,181	14.6	-
Total	62,612	100	100

Figure 5.2.1: Country of birth as a percentage of people with known country of birth (at 31st March 2015)

Legend:
- Guernsey
- Other Crown Dependencies
- United Kingdom and Republic of Ireland
- Portugal
- Latvia
- Other Europe
- Rest of world

There is 85% coverage for place of birth information, which is sourced from the Housing, Health & Social Services and Environment Departments. This is an increase of three percentage points since the last report due to enhancements made to the Rolling Electronic Census system. The coverage of this information is evenly distributed across the population, so the figures presented as percentages of people with known country of birth (rather than percentages of the total population) presented in *Table 5.2.1* and *Figure 5.2.1* are considered reliable for the whole population.

The largest proportion of the population at March 2015 was Guernsey born (60.8%). The next highest proportion was born in the United Kingdom or the Republic of Ireland (27.6%). The countries and groups of countries shown in *Tables 5.2.1* and *5.2.2* and *Figure 5.2.1* are those which make up the highest proportions of the population, except the "Other Crown Dependencies" group, which is included for comparability with the 2001 Census results. Direct comparisons are not made with previous census results in this Report, due to the different methodologies used, but figures are broadly comparable.

A table of the population by the full list of countries of birth is available in a spreadsheet format from *www.gov.gg/population*.

Table 5.2.2: Length of stay by country of birth (at 31st March 2015)

	Less than 1 year	1 to less than 5 years	5 to less than 10 years	10 to less than 15 years	15 to less than 20 years	Over 20 years	Total
Guernsey	24	137	2,313	2,366	3,532	24,117	32,489
Other crown dependencies	15	22	21	28	40	277	403
United Kingdom and Republic of Ireland	557	1,522	1,556	1,576	1,543	7,995	14,749
Portugal	116	284	235	157	168	275	1,235
Latvia	117	334	340	189	20	4	1,004
Other Europe	363	442	277	122	105	382	1,691
Rest of world	220	432	373	269	143	423	1,860
Place of birth unknown	969	3,057	1,124	742	312	2,977	9,181
Total	2,381	6,230	6,239	5,449	5,863	36,450	62,612

5.3 Housing licence type

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 and (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 the local market accommodation that the licence holder may occupy and the duration of the licence.

As shown in *Table 5.3.1*, 11.7% of the population resident on 31st March 2015 had an employment or non-employment related housing licence (including open market). The remaining portion had a housing control document showing that they were a qualified resident or were family member of a qualified resident or had no housing control document. People may legitimately be resident and have no housing control document if for example they have been resident since before 1994, when the Housing Law was enacted, and have not changed employer since then or if they have not worked since 1994 and so have not needed to prove their "right to work" to an employer via a housing document.

For more information on housing licences, please see *www.gov.gg/rightoworkandhouseinglicences*.

Table 5.3.1: Housing licence type (at 31st March 2015)

	No. people	% of total population
Essential employment-related licence holder or their family	2,378	3.8
Living in States of Guernsey staff accommodation	236	0.4
Short-term employment-related housing licence holder	823	1.3
Temporary right to work document holder	122	0.2
Open Market owner, employee or tenant or their family	2,843	4.5
Non-employment related licence holder or their family	941	1.5
Qualified resident or their family	37,607	60.1
No Housing Control document	17,662	28.2
Total	62,612	100

Figure 5.3.1: Housing licence type (at 31st March 2015)

- Employment-related housing licence or temporary right to work document holder
- Open Market owner, employee or tenant or their family
- Non-employment related licence holder or their family
- Qualified resident or their family or no housing control document
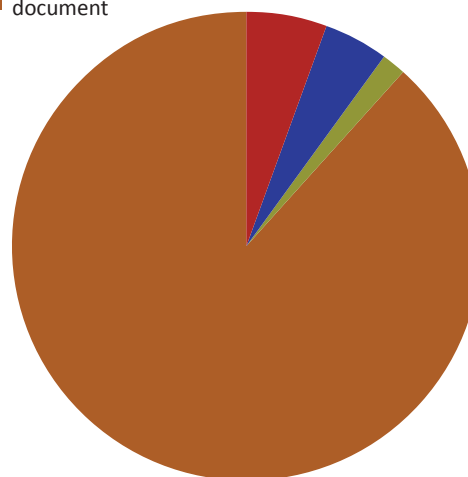
Table 5.3.2: Length of stay by housing licence type (at 31st March 2015)

	Less than 1 year	1 to less than 5 years	5 to less than 10 years	10 to less than 15 years	15 to less than 20 years	Over 20 years	Total
Employment-related housing licence or temporary right to work document holder	869	1,341	769	440	85	55	3,559
Open Market owner, employee or tenant or their family	258	754	811	469	315	236	2,843
Non-employment related licence holder or their family	11	56	144	250	219	261	941
Qualified resident or their family or no housing control document	1,243	4,079	4,515	4,290	5,244	35,898	55,269
Total	2,381	6,230	6,239	5,449	5,863	36,450	62,612

Table 6.1.1: Population and population density by parish (at 31st March 2015)

	No. people	% of total population	Population density (people per square kilometre)
Castel	8,704	13.9	854
Forest	1,589	2.5	388
St. Andrew	2,438	3.9	541
St. Martin	6,457	10.3	882
St. Peter Port	18,599	29.7	2,900
St. Pierre Du Bois	2,090	3.3	327
St. Sampson	8,980	14.3	1,436
St. Saviour	2,745	4.4	429
Torteval	1,013	1.6	327
Vale	9,592	15.3	1,075
Herm and Jethou	79	0.1	52
Address unknown	326	0.5	-
Total	62,612	100.0	962

Figure 6.1.1: Population density map (at 31st March 2015)
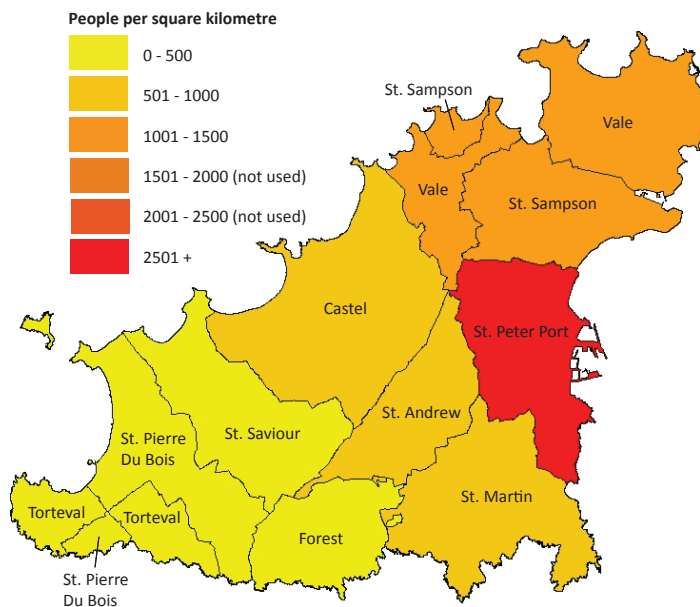
The spatial population analysis presented over *pages 14 to 16* is based on people's residential addresses, sourced from all of the Departments linked into the Rolling Electronic Census system. There is an automated process to determine which address is the most up-to-date and reliable one to use for each person. The coverage has been increased from 98.3% in March 2014 to 99.5% in March 2015 due to enhancements to the Rolling Electronic Census system. The 0.5% of the population for which the address was unknown includes those for whom only a business address was held or an address with insufficient detail to determine a specific location on the island.

As shown in *Table 6.1.1*, St. Peter Port has the highest population and the highest population density at 18,599 people (29.7% of the population) and 2,900 people per square kilometre. The population density of St. Peter Port is more than double that of St. Sampson, which has the next highest density.

The parish with the lowest population is Torteval. Torteval is also the smallest parish by area. St. Pierre Du Bois and Torteval have the lowest population density at 327 people per square kilometre, over eight times fewer than St. Peter Port.

Population densities are mapped in *Figure 6.1.1*.

Population by parish area is available in a map format on request. Population by other spatial areas may also be available. All requests should be submitted via *www.gov. gg/population*.

Table 6.1.2: Percentage of population by age group and parish (at 31st March 2015)

	Castel	Forest	St. Andrew	St. Martin	St. Peter Port	St. Pierre Du Bois	St. Sampson	St. Saviour	Torteval	Vale	Herm and Jethou
0 - 15	17.7	16.2	17.8	18.0	15.4	14.6	15.5	18.6	15.1	16.4	21.3
16 - 64	60.2	60.5	61.8	61.8	71.0	62.3	64.9	59.8	60.9	63.9	78.7
65 - 84	18.4	20.3	17.5	17.2	11.7	20.9	17.2	18.6	20.7	17.4	0.0
85 +	3.7	2.9	2.9	3.1	1.9	2.2	2.4	3.0	3.3	2.3	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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

6.2 Population by voting district

The island's voting districts are broadly aligned with the parish boundaries, as shown in *Figure 6.2.1*. The parishes of St. Andrew and St. Martin are combined to form the South East voting district and the parishes of Forest, St. Pierre Du Bois, St. Saviour and Torteval are combined to form the West. St Peter Port is split into two voting districts, St. Peter Port North and South.

Table 6.2.1 shows the total population by voting district and also estimates of the size of the population that is eligible to vote. Voting eligibility is based on meeting the following criteria: aged 16 or over (although people may register on the Electoral Roll from the age of 15), having been resident in Guernsey for 2 years continuously or two years in total during the preceding five years, ordinarily resident in Guernsey and not subject to a legal disability. The estimates presented in *Table 6.2.1* show people aged 16 or over on 31st March 2015, who were ordinarily resident and had been resident in Guernsey for two years continuously or in total.

It can be seen that St. Peter Port North contains the highest portion of the population (10,291 people or 16.4%) and the highest number of people that are eligible to vote (7,892).

The next election is due to be held in April 2016. For more information see *www.election2016.gg.*

Table 6.2.1: Population by parish voting district (at 31st March 2015)

	No. people	% of total population	No. people eligible to vote (estimate)	% of total eligible population (estimate)
Castel	8,704	13.9	6,888	13.9
South East	8,895	14.2	6,893	13.9
St Peter Port North	10,291	16.4	7,892	16.0
St Peter Port South	8,387	13.4	6,444	13.0
St Sampson	8,980	14.3	7,411	15.0
Vale	9,592	15.3	7,847	15.9
West	7,437	11.9	5,962	12.0
Address unknown	326	0.5	141	0.3
Total	62,612	100	49,479	100

Figure 6.2.1: Voting districts map
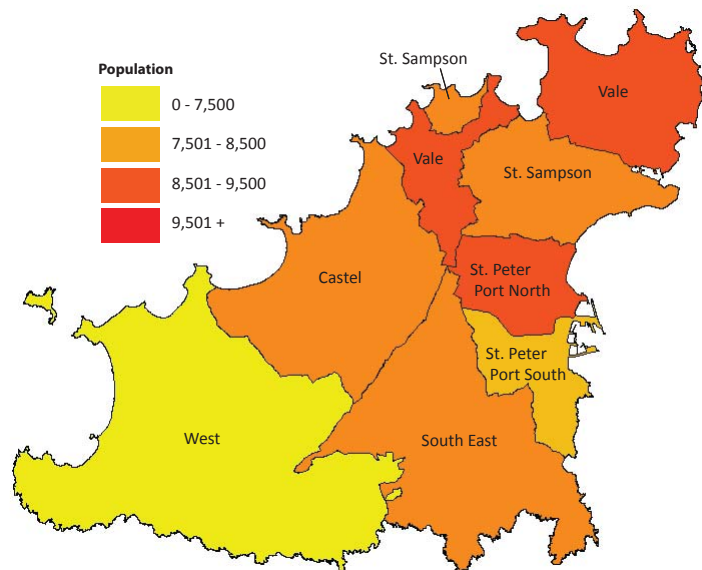
Table 6.3.1: Population by primary school catchment area and age (at 31st March 2015)

	0	1	2	3	4	5	6	7	8	9	10	11
Amherst Primary	101	84	101	89	75	76	91	75	75	54	68	89
Castel Primary	49	52	64	70	61	66	72	61	61	59	58	47
Forest Primary	12	16	12	20	26	25	25	17	24	20	22	27
Hautes Capelles Primary	51	62	66	63	58	63	71	68	66	57	75	64
La Houguette Primary	49	53	57	67	48	64	58	53	78	64	68	72
La Mare de Carteret Primary	66	43	62	74	66	71	69	66	68	60	65	66
St Martins Primary	67	93	83	100	77	81	85	81	90	99	94	90
Vale Infant & Junior	96	108	98	104	99	117	97	117	93	93	81	102
Vauvert Primary	141	129	122	114	117	105	90	83	96	99	62	89
Address Unknown	0	2	0	0	0	1	1	0	0	0	0	0
Total	632	642	665	701	627	669	659	621	651	605	593	646

Figure 6.3.1: School catchment area map

High school catchment areas (overlayed)
- Les Beaucamps
- La Mare de Carteret
- St Sampsons
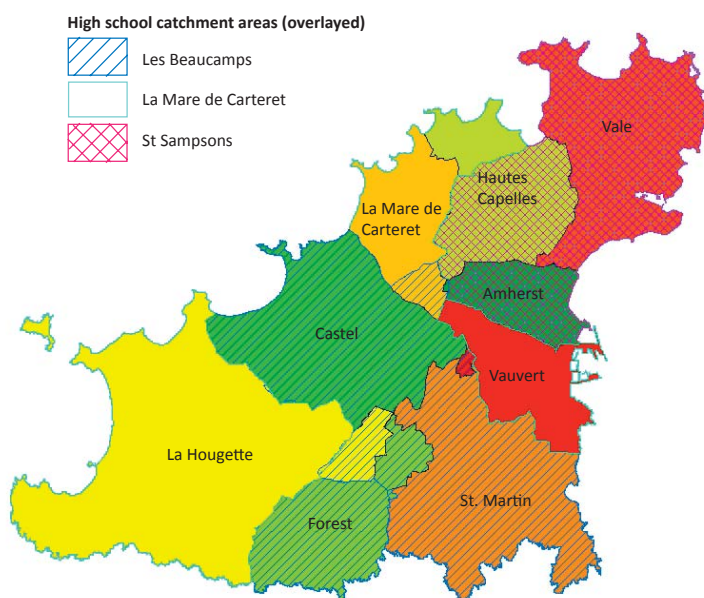
See *www.education.gg/catchment areas* for catchment area maps in more detail.

This page shows which school catchment area people of pre-school and compulsory school age lived in on 31st March 2015.

It should be noted that a person's school year is determined by their age on 1st September rather than 31st March. It should also be noted that there are three private independent primary schools and three grant-aided Colleges (for 11 to 18 year olds) along with special schools Le Rondin and Le Murier and the Grammar School & Sixth Form Centre, which all admit children living in any catchment area. There are also two 'voluntary' Catholic primary schools which admit children from an island-wide catchment. Certain criteria will apply for entry to all of these schools.

As shown in *Table 6.3.1* and *6.3.2*, the number of people of a particular age can vary by around 130 (22% of the total). The number of people of a particular age within a particular catchment can vary by a greater proportion.

Table 6.3.2: Population by high school catchment area and age (at 31st March 2015)

	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Les Beaucamps High School	139	169	179	207	173	185	191	172	187	191	184	180	150	168	203	188	171
Mare de Carteret High School	251	235	234	254	237	247	218	209	247	220	200	225	200	217	241	250	255
St Sampsons High School	241	236	252	240	217	236	249	240	217	194	209	241	217	213	208	250	243
Address Unknown	0	2	0	0	0	1	1	0	0	0	0	0	0	0	0	0	1
Total	631	642	665	701	627	669	659	621	651	605	593	646	567	598	652	688	670

7.1 Population by housing market

Details relating to the specific property a person lives in (e.g. the housing market and tenure), are also based on the person's residential address. The number of unknown addresses is higher at this level of detail (and over the next pages), since the specific apartment or flat number or name is needed (compared to the earlier sections, where the building name is sufficient to identify the area in which a person lives).

It should be noted that as a result of this, the number of people in apartment blocks or similar accommodation are more likely to be classified as "address unknown". This may result in the numbers of people reported to be living in Open Market Part B and D in particular, which includes hotels, lodging houses and shared staff accommodation, being under-stated.

The island's housing stock is split into two categories: Open Market and Local Market and the Housing Control Law governs which units are 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/openmarket* for more information).

As shown in *Table 7.1.1* and *Figure 7.1.1*, 90.9% of the population lived in Local Market property units at the end of March 2015.

8.0% of the population lived in Open Market property units. The majority of that portion (6.8 percentage points) lived in Open Market part A units (see *Figure 7.1.2*).

More information on the island's housing stock is available via *www.gov.gg/property*.

Table 7.1.1: Population by Housing Market (at 31st March 2015)

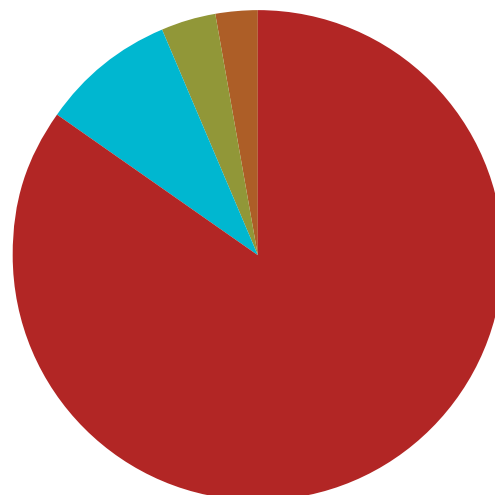|	No. people	% of total population
Local Market	56,891	90.9
Open Market part A	4,239	6.8
Open Market part B	455	0.7
Open Market part C	217	0.3
Open Market part D	130	0.2
Address unknown	680	1.1
Total	62,612	100.0

Figure 7.1.1: Population by Housing Market (at 31st March 2015)

- People living in Local Market
- People living in Open Market
- People with unknown address
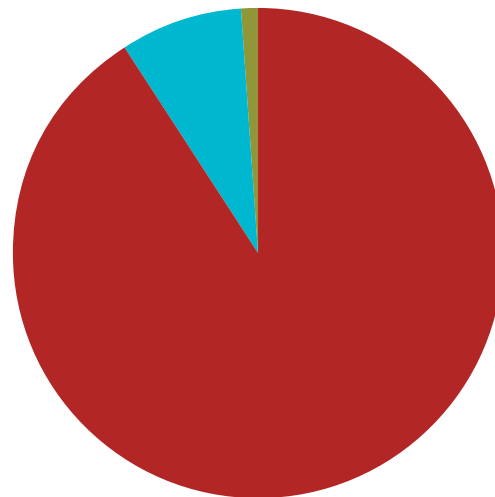
Figure 7.1.2: Population by Open Market part (at 31st March 2015)

- People living in Open Market part A
- People living in Open Market part B
- People living in Open Market part C
- People living in Open Market part D

7.2 Population by tenure

Table 7.2.1: Population by housing tenure (at 31st March 2015)

	No. people	% of total population
Owner occupied	40,586	64.8
Rented	12,794	20.4
Affordable	5,867	9.4
Supported	196	0.3
Other	2,489	4.0
Address unknown	680	1.1
Total	62,612	100.0

Figure 7.2.1: Population by housing tenure (at 31st March 2015)

- People living in owner occupied housing units
- People living in rented housing units
- People living in affordable housing units
- People living in supported housing units
- People living in other housing units
- People with unknown address
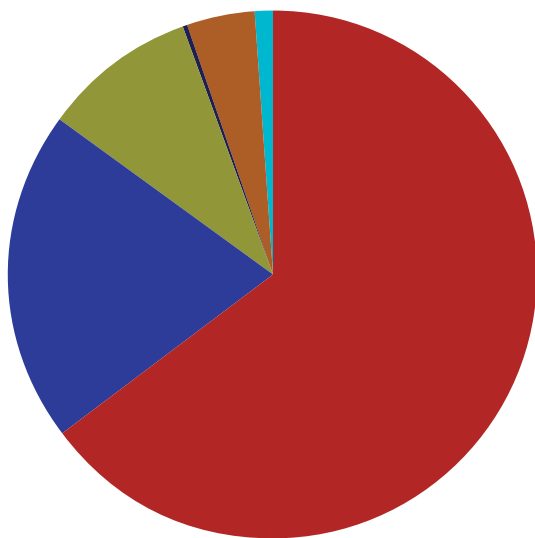
The housing tenure categories presented here reflect those used in the *Annual Housing Stock Bulletin*, which is available from *www. gov.gg/property*. In this Report, the "Other" tenure category includes: hotels, hospitals, residential care homes and the prison (in addition to the types of tenure included in this category in the Bulletin, which are predominantly staff and self-catering). The *Annual Housing Stock Bulletin* reports strictly domestic housing units, but includes vacant units, which do not feature here.

Table 7.2.1 and *Figure 7.2.1* include both Local and Open Market residents. It can be seen that 64.8% of the population lived in owner occupied accommodation at the end of March 2015 compared with 20.4% in private rental accommodation.

At the end of March 2015, 9.4% of the population lived in affordable housing, which includes social rented and partially owned units. 0.3% of the population lived in supported housing units, which includes sheltered and extra care accommodation.

As highlighted by *Figures 7.3.1* and *7.3.2*, the tenure profile of Open Market housing units is quite different to that of Local Market units. All the affordable and supported housing units are in the Local Market, so people living in Open Market units cannot have these tenure types. 10.6% of the people living in Local Market units lived in units with affordable or supported tenure types.

Table 7.3.1 shows that 67.0% of the population living in the Local Market were living in owner occupied units at the end of March 2015, compared with 48.8% in the Open Market. This formed the highest proportion for both Markets.
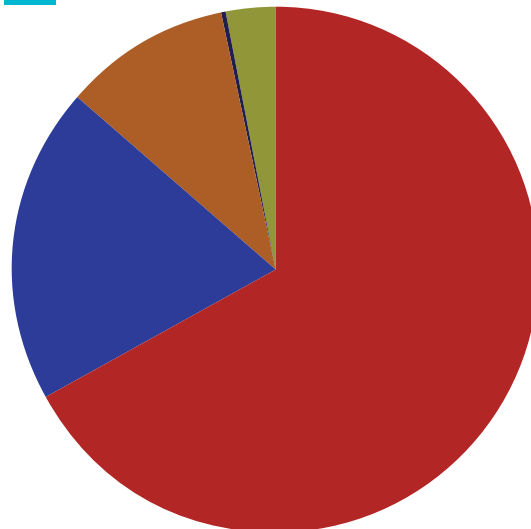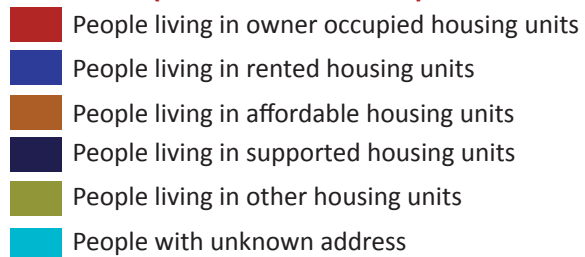
The next highest proportion was the rented tenure, for both Markets.

17.7% of people living in Open Market units had other tenure types, which included people living in Open Market hotels and residential care homes. A lower proportion of those living in Local Market units had other tenure types. In the Local Market, this category included the hospitals and the prison as well as self-catering and staff accommodation.
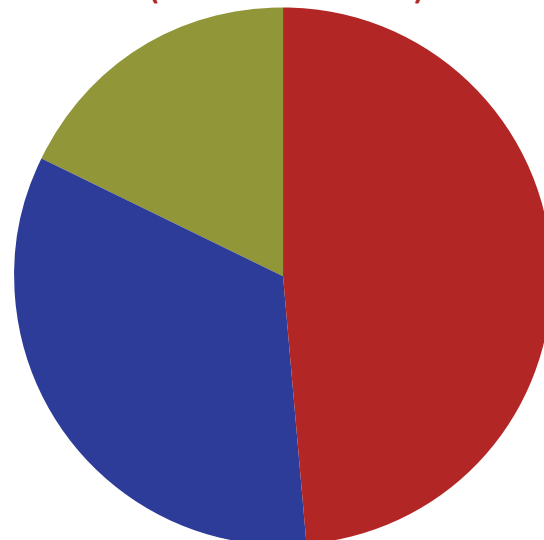
Table 7.3.1: Population by housing tenure (at 31st March 2015)

	% of people in Local Market	% of people in Open Market
Owner occupied	67.0	48.8
Rented	19.5	33.5
Affordable	10.3	0.0
Supported	0.3	0.0
Other	2.8	17.7
Total	100.0	100.0

Figure 7.3.1: Housing tenure of people living in Local Market (at 31st March 2015)

- People living in owner occupied housing units
- People living in rented housing units
- People living in affordable housing units
- People living in supported housing units
- People living in other housing units
- People with unknown address

Figure 7.3.2: Housing tenure of people living in Open Market (at 31st March 2015)

Table 8.1.1: Population by economic status (at 31st March 2015)

	No. people	% of total population
In full-time education or training	9,554	15.3
Employed	27,617	44.1
Self-employed	4,770	7.6
Non-employed	14,147	22.6
Unemployed	399	0.6
Incapacitated	818	1.3
Other	5,307	8.5
Total	62,612	100

Figure 8.1.1: Population by economic status (at 31st March 2015)
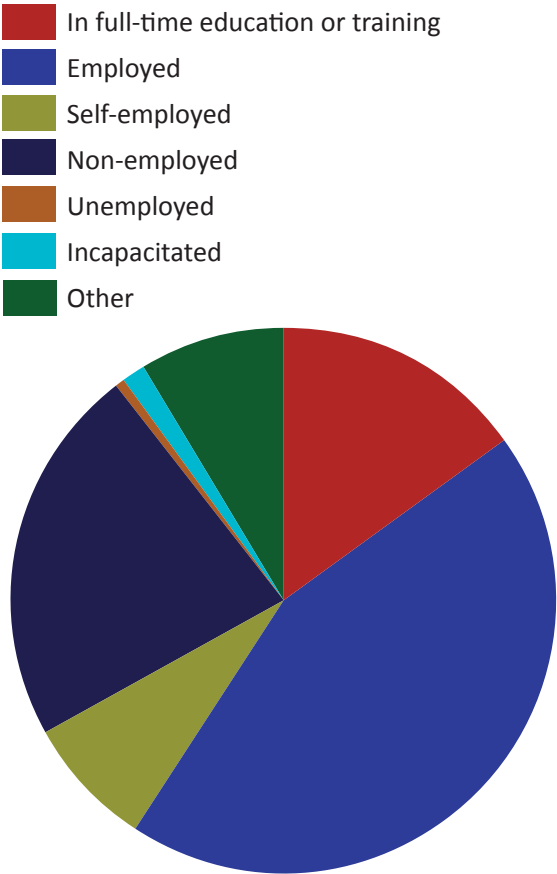
The economic status information presented here is new to this Report and is based on data from Education (schools and universities) and Social Security (benefits and contributions). This information differs to the information included in the quarterly Labour Market Bulletin (available from *www.gov.gg/lmb*) due to being collated at a different time (later, allowing for more returns to be included) and using a different method. More information on the differences is available in *Section 10.1*.

Those in full-time education or training (those at school, college or at university with a grant and those on the Community Environmental Projects Scheme) constituted 15.3% of the whole population.

The 44.1% categorised as employed are those that received wages above the minimum threshold for Social Security contributions during the last week of the quarter. This includes those working part time and in some cases, claiming unemployment or an incapacity benefit. Of those, 3.7% (or 1.6% of the whole population) were also self-employed.

The self-employed population (7.6%) are those that were not employed and paid self-employed contributions during the last week of the quarter.

The 22.6% of non-employed people are those that paid non-employed contributions i.e. were not employed and not seeking work.

The unemployed group (0.6%) were those that called into the job centre during the last week of the quarter, actively seeking work (and had not done any paid work that week).

Those classified as incapacitated (1.3%) were in receipt of long term illness, industrial disablement or similar benefits and were not employed , self-employed or in full-time education.

The "other" group includes anyone that did not fit into any of the categories above.

Figure 8.2.1: Population by economic status and age (at 31st March 2015)

Legend:
- In full-time education or training
- Employed
- Self-employed
- Non-employed
- Unemployed
- Incapacitated
- Other
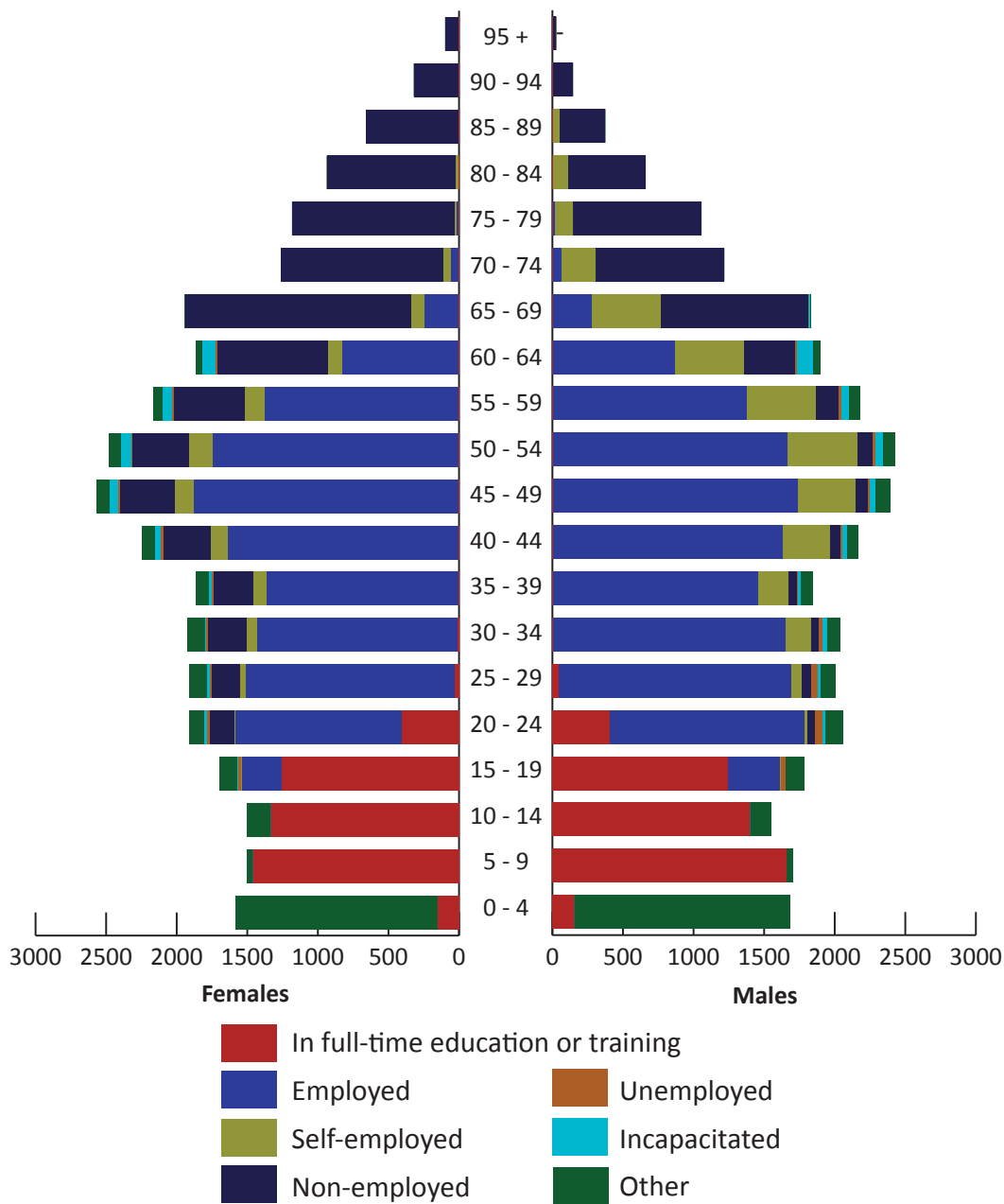
Figure 8.2.1 shows how economic status varies by age group and gender. Some of the similarities and differences are highlighted below. Overall, 81.7% of the working age population (aged 16 to 64 years old) were either in full-time education, employed or self-employed at the end of March 2015.
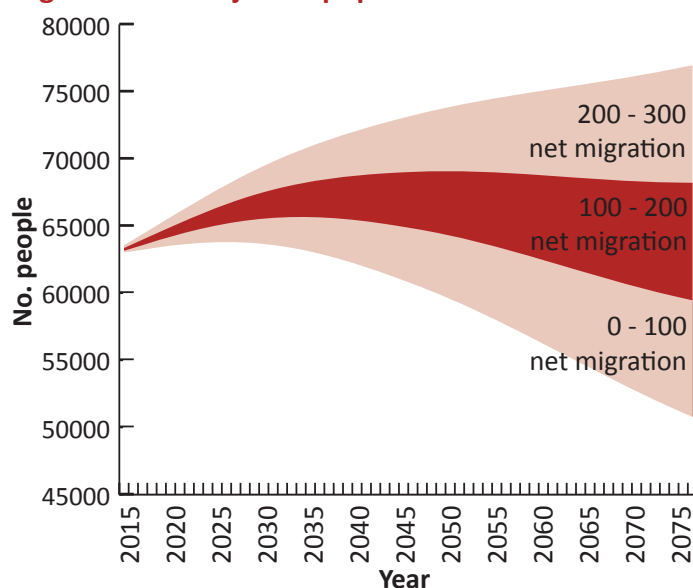
People in full-time education are concentrated in the 5 to 24 age categories, but are apparent in low numbers up to the age group of 55 to 59.

The proportion of the population in employment peaks in the 25 to 29 age group for both females and males at 77.5% and 82.2% respectively.

Self-employment is more predominant in males than females and is seen in age groups from 15 to 19 up to 85 to 89. Unemployment is also more predominant in males, whereas there were more non-employed females than males. However, there were equal numbers of incapacitated males and females.

Figure 9.1.1: Projected population

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. They were last updated in April 2014.

Following a detailed analysis of net migration patterns over the past 15 years, it is considered that the best fit scenario lies between the plus 100 and plus 200 net migration scenarios. As such, the forecasts are presented as a fan in *Figure 9.1.1*, with the dark shaded region indicating the central projection, which gets broader in range as time goes on. This position will continue to be reviewed annually. However, with all forecasts, it should be noted that the uncertainties become greater as one seeks to project further into the future.

Table 9.1.1: Projected population range

	Total population (in 100 net migration scenario)	Total population (in 200 net migration scenario)
2020	64,180	64,918
2030	65,560	67,516
2040	65,412	68,754
2050	64,277	69,070
2060	62,465	68,775
2070	60,467	68,323

As shown in *Figure 9.1.1* and *Table 9.1.1*, the total population is projected to peak between 2030 and 2050 at between 65,500 and 69,000 people. The peak is primarily a result of the ageing of the baby boom generation, but the trajectory of the population is heavily dependent on levels of migration.

Table 9.1.2: Projected dependency ratio

	Dependency ratio (in 100 net migration scenario)	Dependency ratio (in 200 net migration scenario)
2020	0.58	0.57
2030	0.70	0.68
2040	0.80	0.76
2050	0.83	0.77
2060	0.89	0.82
2070	0.87	0.82

As shown in *Table 9.1.2*, the dependency ratio is projected to increase to between 0.76 and 0.80 by 2040. The dependency ratio was 0.54 on 31st March 2015 (see *Page 9*), so this represents an increase of between 22 and 26 people in the dependent age categories per 100 people in the working age category.

It should be noted that these projections include the gradual change of the retirement age from 65 to 67 between 2020 and 2032. More detail on the projected changes to each age group is shown on the opposite page and graphically on *Page 24.*

9.1 Population projections

Since it has been agreed that the retirement age will gradually increase from 65 to 67 between 2020 and 2032, the working age category presented on this page and used in the graphs overleaf changes over time to reflect this.

As shown in *Tables 9.1.4* and *9.1.6*, the proportion of people under 15 is projected to fall to between 13.8% and 14.0% in 2040, compared with 16.3% in March 2015. The proportion of people in the working age group is also projected to decrease to between 55.5% and 56.8% in 2040 compared with 65.0% in March 2015, despite the increase in the pension age.

The proportion of people in the older age categories is projected to increase. The proportion of people over retirement age, but less than 85, is projected to increase from 16.1% in March 2015 to between 24.4% and 25.6% in 2040.

The proportion of people aged 85 and over is projected to increase to between 4.8% and 5.1% in 2040, compared with 2.6% in 2015.

These forecasts are linked to projected increases in life expectancy, the ageing of the baby boom generation and reducing numbers of babies being born due to a projected lower population of child bearing age.

See overleaf for the population projections by age group shown graphically.

Table 9.1.3: Projected population by age group (in plus 100 net migration scenario)

	0-15	16 - 64/65/66	65/66/67 - 84	85 +
2020	10,210	40,660	11,364	1,946
2030	9,891	38,492	15,193	1,984
2040	9,032	36,303	16,751	3,327
2050	8,748	35,099	15,937	4,493
2060	8,592	33,039	15,323	5,511
2070	8,064	32,325	14,759	5,320

Table 9.1.4: Projected population by age group as a percentage of total population (in plus 100 net migration scenario)

	0-15	16 - 64/65/66	65/66/67 - 84	85 +
2020	15.9	63.4	17.7	3.0
2030	15.1	58.7	23.2	3.0
2040	13.8	55.5	25.6	5.1
2050	13.6	54.6	24.8	7.0
2060	13.8	52.9	24.5	8.8
2070	13.3	53.5	24.4	8.8

Table 9.1.5: Projected population by age group (in plus 200 net migration scenario)

	0-15	16 - 64/65/66	65/66/67 - 84	85 +
2020	10,264	41,351	11,357	1,946
2030	10,151	40,209	15,170	1,986
2040	9,593	39,056	16,777	3,327
2050	9,495	38,935	16,155	4,486
2060	9,502	37,750	15,999	5,523
2070	9,186	37,613	16,120	5,403

Table 9.1.6: Projected population by age group as a percentage of total population (in plus 200 net migration scenario)
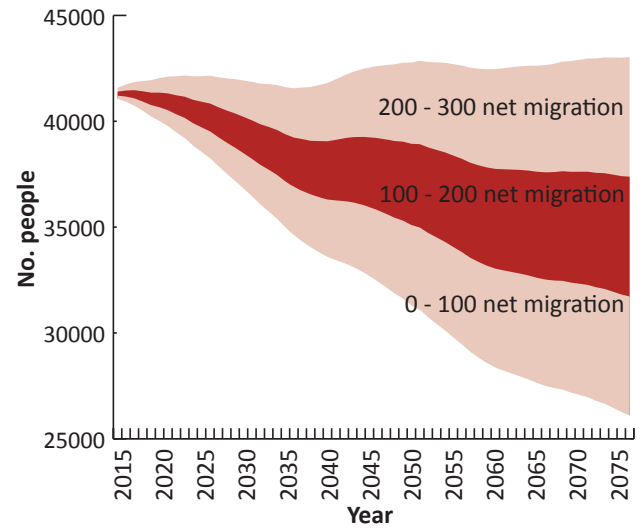
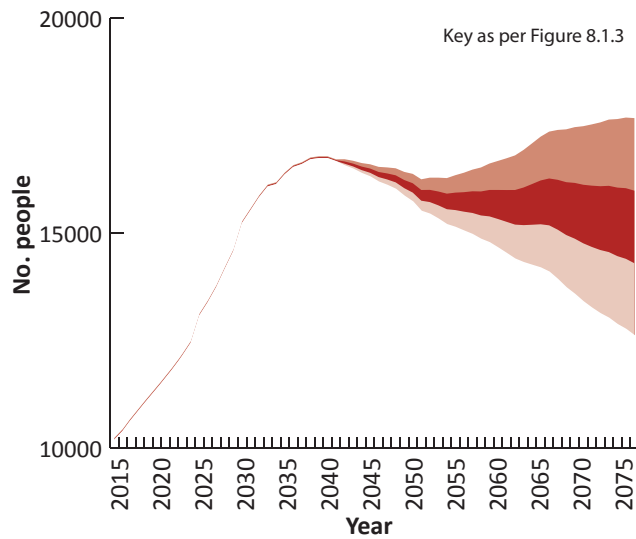|	0-15	16 - 64/65/66	65/66/67 - 84	85 +
2020	15.8	63.7	17.5	3.0
2030	15.0	59.6	22.5	2.9
2040	14.0	56.8	24.4	4.8
2050	13.7	56.4	23.4	6.5
2060	13.8	54.9	23.3	8.0
2070	13.4	55.1	23.6	7.9

Figure 9.1.2: Projected 0 to 15 age group population
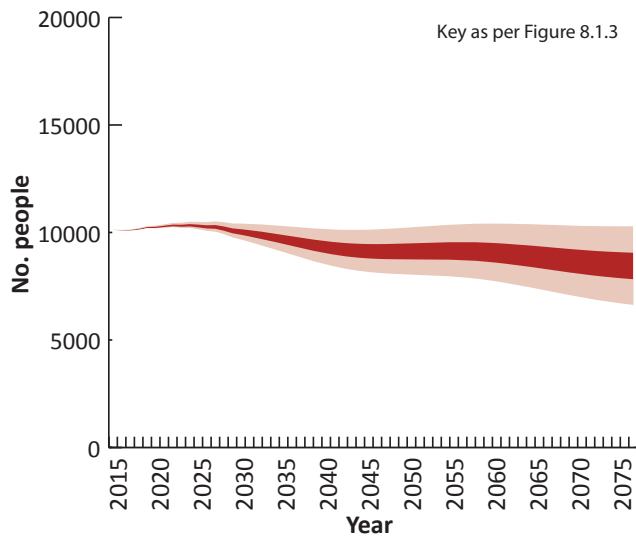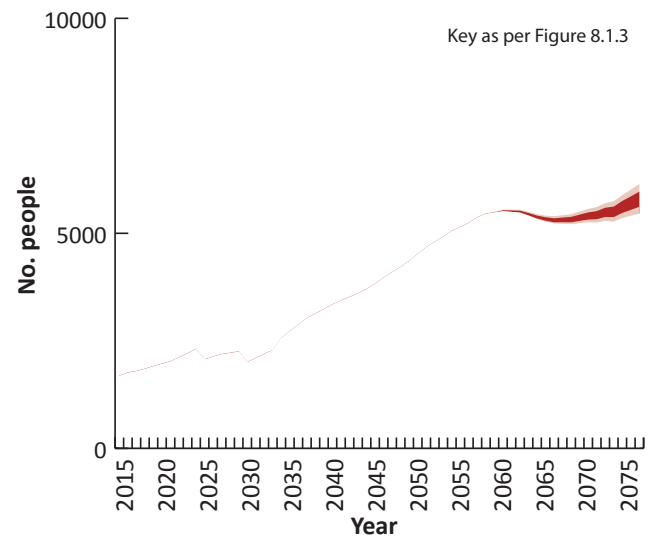

Figure 9.1.3: Projected working age group population

Figure 9.1.4: Projected retirement to 84 age group population

Figure 9.1.5: Projected 85 and over age group population

The Rolling Electronic Census Project

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. Instead a project to collate population statistics from administrative sources, known as the Rolling Electronic Census Project, was initiated.

The Rolling Electronic Census Project, which was completed in late 2014, involved developing an IT system to collate, match and process information from ten separate States of Guernsey sources. The IT system, developed by Digimap Ltd, replicates the method used since 2006 by the Social Security Department to calculate population headcounts and includes additional cross checks. It also brings together information which people have provided to the various States Departments, such as address updates and place of birth, removing the need for this information to be provided again via a traditional census method. The information is updated quarterly and the whole process is automated as far as possible. This data sharing is enabled by the Electronic Census Ordinance, which was enacted in 2013 and also strictly controls who can access the information and the purposes for which it can be used.

All the data is held securely (in electronic copy only) and only Census Officers have access to the IT system. The benefits of this are that there would be an audit trail of access to the information if needed and additionally Census Officers have less contact with personal details than they would if handling traditional census forms, since the data is anonymised by the IT system before being made available for analysis. The data can be used for statistical purposes only.

The Project cost approximately half the cost of one traditional census and each five years' worth of running costs will also total a similar sum.

This Report replaces the previously published Annual Population Bulletin and seeks to answer the questions most frequently asked of the Policy and Research Unit regarding the population of Guernsey, as well as providing continuity of information relating to key demographic trends. It is intended that a quarterly Population, Employment and Earnings Bulletin will be developed in 2016.

The contents of this Report will continue to be developed over time, so if you have any feedback or would like to see other information included in this or other publications in the future, please contact the Policy and Research Unit.

People that are included in the headcount

The total headcount presented in this Report represents the ordinarily resident population of Guernsey, Herm, Jethou and Lihou on 31st March. It includes all the people living on one of the islands with some permanency (all individuals who are employed in Guernsey or who are resident for longer than 26 weeks are required to register with the Social Security Department) and people who may not have physically been on island on the particular day, such as those in full-time education off island and those away on holiday or business. It excludes short-term visitors to the island (on holiday, business trips or other visits).

10.1 Methodology

Administrative changes

The types of population changes that are referred to as "Administrative Changes" are those which cannot be attributed to actual migration or natural increase. In the context of the transition over to the Rolling Electronic system in 2014, this resulted in the inclusion of some people who had not previously been included in Social Security headcounts, such as: people living in Guernsey that had previously been thought to be living in Alderney, people below school age who were not in receipt of family allowance and people who are not liable for Social Security contributions. It also resulted in the exclusion of some people who had previously been included in Social Security headcounts, such as people who had provided other Departments with an off-Island address and showed no other evidence of being on Island and a very small number of people who had been double counted due to being known by different names to the Education and Social Security Departments.

Other administrative changes include the removal of duplicate via the ongoing cross checking process and as more information becomes available. Any changes due to migration or natural increase, which came to light during the year ending March 2015, but occurred earlier have been attributed to the relevant year and as such, previously published figures have been restated. These updates are low in number (at most 40 or 0.06% in any one year) and as such, do not impact on the overall picture or trends.

Economic Status

The most significant difference between the economic status information published in this report and that published in previous Labour Market Bulletins is that it is based on earnings or benefits actually received, rather than classifications used for Social Security contribution purposes. As such, the number of self-employed people is substantially higher for example, since these people would have previously been classed as non-employed once they reached 65.

There are also timing differences, since the Rolling Electronic Census data is collected slightly later each quarter the Labour Market Bulletin data, so the information is more complete. Additionally, information from the education Department is included to help determine which people are in full time education (some of these people may also be employed or self-employed).

Both sets of figures will continue to be produced until a full transition can be made to the more complete information sourced through the Electronic Census.

11.1 Contact details

All the Policy and Research Unit publications are available from *www.gov.gg/pru*.

Please contact Helen Walton (Research Section Manager) for further information.

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