Guernsey Annual Electronic Census Report

Population at 31st March 2022
Employment and Earnings at 30th September 2022
Unemployment at 1st October 2022

Issue date 31st January 2023

The Guernsey Annual Electronic Census Report provides headline information on the population of Guernsey (including the islands of Guernsey, Herm, Jethou and Lihou) using data collated by the Rolling Electronic Census IT System.

Contents

1.1 Introduction

This ninth Guernsey Annual Electronic Census Report, published in January 2023, 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 2022, as well as information regarding employment and earnings at 30th September 2022. It also contains information on immigration, emigration, births and deaths over the past five years and a longitudinal analysis of people that immigrated here five years ago. All are compiled using data collated by the Rolling Electronic Census IT System. More information on the Rolling Electronic Census is available in **Section 14.1**.

Census Reports were historically published every five or ten years, but this Report is published annually with updates in between in the **Quarterly Population, Employment and Earnings Bulletin**.

Information on the history of the census in Guernsey and historic statistics are available from **www.gov.gg/census**, which includes long term historic trend data and information for anyone wanting to access past census records (including the recently released 1921 records).

The Bailiwick of Guernsey has had two strict lockdowns to help slow the spread of COVID-19. The first started on 25th March 2020 and restrictions were lifted in phases from 25th April to 20th June 2020 (87 days in total), when the only remaining restrictions related to travel outside the Bailiwick. This remained in place until the second strict lockdown, which started on 23rd January 2021. Restrictions were lifted in stages from 11th February 2021 (58 days after the start of the second strict lockdown) until 17th February 2022, when all legal restrictions were removed. Throughout this bulletin, notes are included where there are coronavirus related impacts.

Ordinarily, unemployment benefit figures as at the end of December would be included as part of this annual report. However, the full data extract was not available at the time of publishing. This means that unemployment benefit figures, presented in **Section 11**, represent the period up to 1st October 2022.

Remuneration data, sourced from the Revenue Service, is also included to help give a fuller picture of employment earnings trends (see **Section 13**).

As far as possible, international age groupings and classifications have been used to assist comparability with other jurisdictions.

Contact details are included in **Section 14.2** if you would like further information.

- At the end of March 2022, Guernsey's population was 63,711.

- There was a natural decrease of 81 people and a net migration of 491 people over the year ending 31st March 2022, giving a total increase of 410 people (0.6%) since 31st March 2021.

- During the year ending 31st March 2022 there was an annual increase of 0.5% in the 16 to 64 age group (184 people). The 65 to 84 and 85 and over age groups showed increases of 151 people (1.3%) and 77 people (4.4%) respectively. The number of people in the 0 to 15 age category decreased by less than 0.1% (2 people) over the year ending 31st March 2022.

- Longitudinal analysis showed that 41% of people that immigrated to Guernsey during the year ending 31st March 2017 were ordinarily resident on 31st March 2022. Of these, 78% were in full time education or were employed or self-employed on 31st March 2022. A year earlier, these figures were 40% and 75% respectively.

- There was a minimum of 25,244 households living in Guernsey on 31st March 2022, compared to 25,032 the previous year and 24,280 five years earlier, in 2017. The proportion of one adult households saw the largest increase between 2017 and 2022.

- 30.4% of the population lived in St. Peter Port at the end of March 2022; the most highly and densely populated parish.

- 91.6% of the population lived in Local Market housing units and 7.3% lived in Open Market units at the end of March 2022 (the precise address was unknown for the remaining small portion of the population).

- In September 2022, 31,196 people were employed or self-employed in Guernsey (28,080 people worked for an employer and 3,116 people were self-employed), 1.0% more than at the end of September 2021.

- During the week ending 1st October 2022, 0.8% of the workforce (242 people) were wholly unemployed, the lowest proportion seen since 2008.

- The Finance sector provided 5,971 employment roles (from zero hours to full time contracts) in September 2022 (18.0% of the total).

- Between September 2021 and September 2022, the following sectors decreased in terms of numbers of employment roles: Wholesale, retail and repairs, Transport and storage, Information and communication, Finance, Real estate activities, Human health, social and charitable work activities and Other service activities. All other sectors increased numbers of roles between September 2021 and September 2022 (to higher than September 2019 levels, with the exception of the Electricity, gas, steam and air conditioning supply sector).

- Median earnings as at 30th September 2022 were £38,252 which, compared with a year earlier, was 5.3% higher in nominal terms and 0.9% lower in real terms.

The following pages contain population and demographic information sourced from the Rolling Electronic Census system.

As a result of the additional information incorporated by the Rolling Electronic Census system each quarter, 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.

As can be seen in **Table 2.1.1** and **Figure 2.1.1**, the total population increased by 410 people (0.6%) over the year ending 31st March 2022.

Page 4 shows natural increase and net migration. Natural increase in population is defined as the number of births minus the number of deaths during a particular time period. Net migration is the difference between immigration (people moving to the island) and emigration (people moving off the island). The natural decrease for the year ending 31st March 2022 was 81 and the net migration was 491.

Between 19th March 2020 and 30th June 2021, people travelling into the Bailiwick of Guernsey were subject to testing and/or self-isolation requirements unless they had an exemption for medical, compassionate or critical work reasons, for example. It is likely that the travel restrictions in place during 2020 had a large impact on migration, for example of seasonal workers to support hostelry and other tourist-based activities. Travel restrictions were lifted in stages from 1st July 2021 until 17th February 2022, when the conditions for travelling into the island were returned to how they had been pre-pandemic.

There were 498 births during the year ending 31st March 2022 (see **Table 2.2.1** on **page 4**) and 579 deaths. The number of deaths involving the coronavirus (COVID-19) has been made available by Public Health Services (see **covid19.gov.gg/test-results** for more information).

Annual population changes by age groups are given on **page 11**.

Table 2.1.1 Annual changes in total population

	Annual change due to net migration and natural increase	Annual % change due to net migration and natural increase
Q1 2012	170	0.3
Q1 2013	-353	-0.6
Q1 2014	-109	-0.2
Q1 2015	-110	-0.2
Q1 2016	7	<0.1
Q1 2017	-148	-0.2
Q1 2018	211	0.3
Q1 2019	384	0.6
Q1 2020	379	0.6
Q1 2021	366	0.6
Q1 2022	410	0.6

Figure 2.1.1 Annual population change due to net migration and natural increase
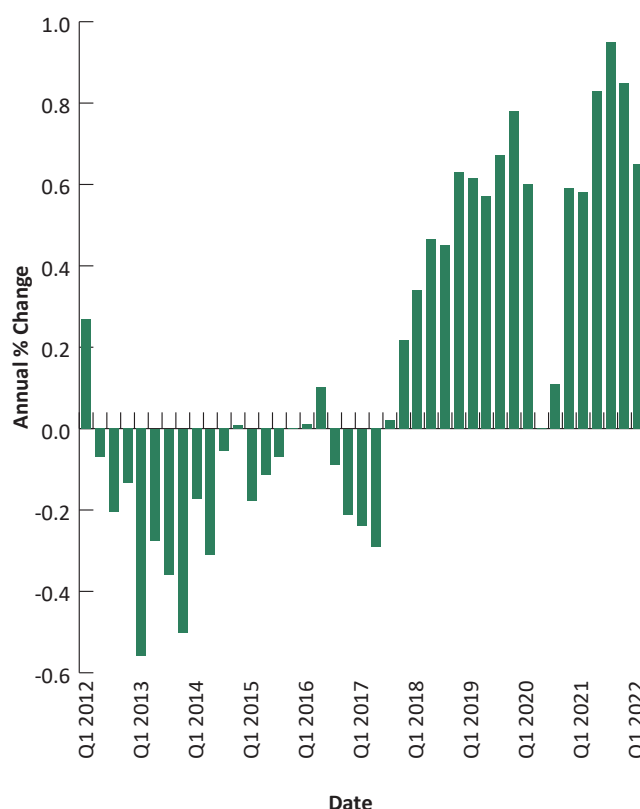
2.2 Population changes

Table 2.2.1 Annual changes in total population by type of change

|	Births	Deaths	Natural increase	Immigration	Emigration	Net migration	Natural increase and net migration	Net admin changes	Total population at quarter end
Q1 2012	674	547	127	4,220	4,177	43	170	0	63,085
Q1 2013	667	556	111	3,845	4,309	-464	-353	0	62,732
Q1 2014	628	526	102	3,601	3,812	-211	-109	-282	62,341
Q1 2015	580	557	23	3,628	3,761	-133	-110	3	62,234
Q1 2016	595	536	59	3,755	3,807	-52	7	-33	62,208
Q1 2017	571	586	-15	3,636	3,769	-133	-148	46	62,106
Q1 2018	542	574	-32	3,628	3,385	243	211	-27	62,290
Q1 2019	497	535	-38	3,697	3,275	422	384	7	62,681
Q1 2020	515	511	4	3,714	3,339	375	379	-125	62,935
Q1 2021	487	541	-54	2,448	2,028	420	366	0	63,301
Q1 2022	498	579	-81	2,945	2,454	491	410	0	63,711

Please note that the figures shown in the table above and the graphs below are totals over the four quarters ending in the quarter shown.

The number of deaths involving the coronavirus (COVID-19) has been made available by Public Health Services (see **covid19.gov.gg/test-results** for more information).

Changes to the population headcount due to methodological differences 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 14.1** for more information on administrative changes. The year ending 31st March 2020 saw a higher than normal level of administrative changes, because some extra sources of data were joined up with the Electronic Census in late 2022. The additional information has resulted in corrections to some of the information previously held and improved confidence overall.

With administrative changes included, the population was 63,711 on 31st March 2022 (see **Table 2.2.1**).

Figure 2.2.1 Annual births and deaths
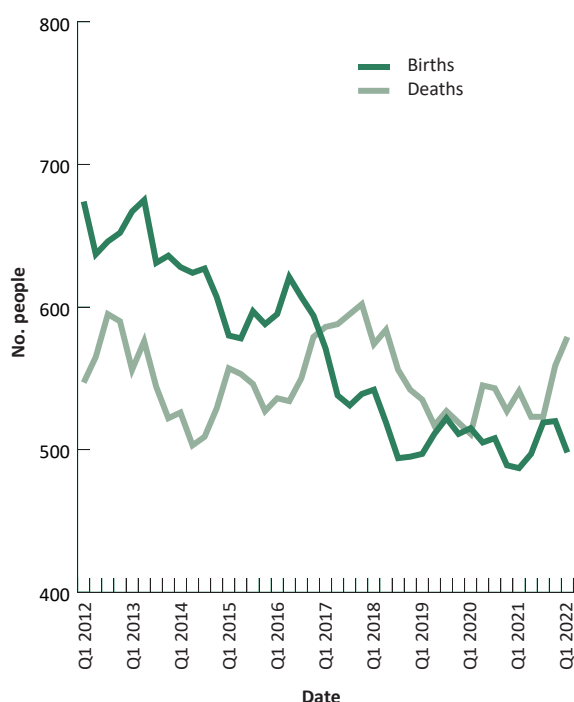
Figure 2.2.2 Annual immigration and emigration

Section 2.3 provides a more detailed breakdown as to the profile of immigrants and emigrants over a five year period for the years ending 31st March. Electronic Census data is used for the analysis. Approximately 20% of the total were people that immigrated and then emigrated within the year or vice versa. This figure was the same for the year ending 31st March 2021 and one third of the total for years prior to 2021.

As can be seen in **Figure 2.3.1** and **Table 2.3.1**, the majority of immigrants during the year ending 31st March 2022 were aged between 16 and 64 (82.4%). This compares to 89.2% five years earlier, for the year ending 31st March 2017.

Figure 2.3.2 and **Table 2.3.2** show emigrants from the island over the past five years, broken down by age group. The majority of emigrants during the year ending 31st March 2022 were aged between 16 to 64 (82.4%). This compares to 88.5% five years earlier, for the year ending 31st March 2017.

It is likely that the travel restrictions in place during 2020 and early 2021 had a large impact on migration, for example of seasonal workers to support hostelry and other tourist-based activities.

Please note that the total number of immigrants and emigrants was significantly lower during the years ending 31st March 2021 and 31st March 2022 than other years, again likely due to the travel restrictions in place during 2020 and early 2021.

Figure 2.3.1: Immigration by age (during the years ending 31st March)
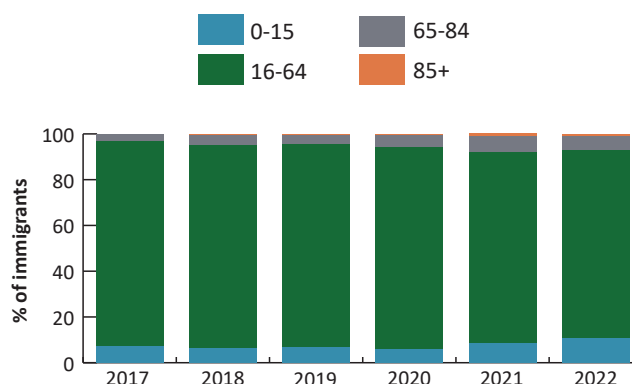
Table 2.3.1: Immigration by age (during the years ending 31st March)

				% of immigrants
	0 - 15	**16 - 64**	**65 - 84**	**85+**
2017	7.3	89.2	3.3	0.2
2018	6.5	88.3	4.6	0.6
2019	6.9	88.5	4.1	0.5
2020	5.8	88.6	5.0	0.6
2021	8.7	83.3	7.0	0.9
2022	10.6	82.4	5.7	1.3

Figure 2.3.2: Emigration by age (during the years ending 31st March)
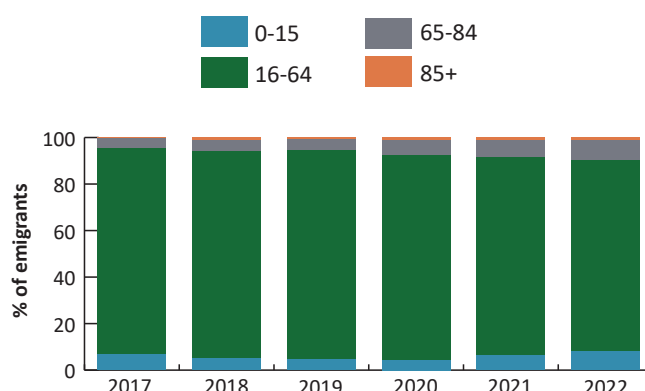
Table 2.3.2: Emigration by age (during the years ending 31st March)

				% of emigrants
	0 - 15	**16 - 64**	**65 - 84**	**85+**
2017	6.8	88.5	4.3	0.4
2018	5.0	89.1	4.9	1.1
2019	4.5	89.9	4.9	0.8
2020	4.4	88.0	6.4	1.2
2021	6.2	85.4	7.1	1.3
2022	7.9	82.4	8.4	1.3

Figure 2.3.3: Immigration by length of stay (during the years ending 31st March)
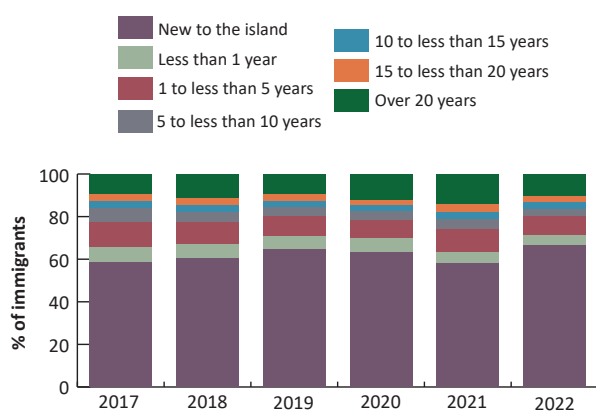
Table 2.3.3: Immigration by length of stay (during the years ending 31st March)

	New to island	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
2017	58.5	7.3	11.7	6.5	3.2	3.7	9.3
2018	60.1	7.0	10.0	5.0	3.1	3.7	11.1
2019	64.5	6.4	9.1	4.6	2.8	3.0	9.7
2020	63.2	6.5	8.5	4.4	2.5	2.7	12.2
2021	58.0	5.2	11.0	4.6	3.3	3.6	14.3
2022	66.6	4.4	9.1	3.5	2.9	3.0	10.6

Figure 2.3.4: Emigration by length of stay (during the years ending 31st March)

Table 2.3.4: Emigration by length of stay (during the years ending 31st March)

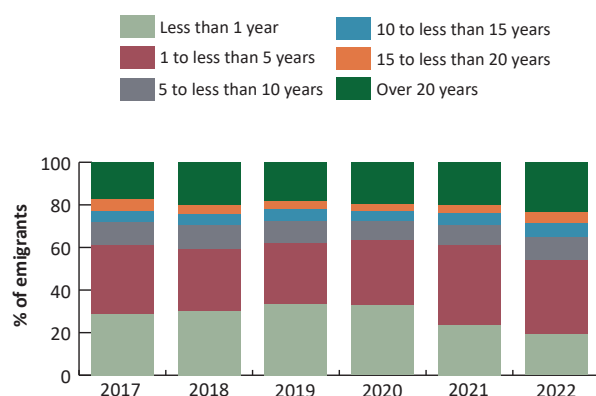|	Less than 1 year	1 to less than 5 years	5 to less than 10 years	10 to less than 15 years	15 to less than 20 years	Over 20 years
2017	28.9	32.0	11.0	5.3	5.5	17.4
2018	30.2	29.1	11.0	5.2	4.2	20.3
2019	33.5	28.6	10.0	5.7	3.9	18.3
2020	32.8	30.5	8.9	4.7	3.6	19.5
2021	23.5	37.3	9.4	5.9	3.6	20.2
2022	19.2	34.8	10.8	6.5	5.3	23.4

The length of time a person has been resident in the island can be calculated using the Rolling Electronic Census system. The Figures and Tables on this page show immigrants to and emigrants from the island broken down by their length of stay, 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 only available from 1992 onwards (so any stays prior to 1992 would not be included).

Figure 2.3.3 and **Table 2.3.3** show that the majority (66.6%) of immigrants who arrived during the year ending 31st March 2022 were new to the island, the highest proportion in more than five years. During the year ending 31st March 2021, 58.0% of people immigrating were new the island.

As shown in **Table 2.3.3**, 10.6% of those who immigrated to the island during the year ending 31st March 2022 had previously been resident for more than twenty years, compared to 14.3% one year earlier (for the year ending 31st March 2021) and 9.3% five years earlier (for the year ending 31st March 2017).

Figure 2.3.4 and **Table 2.3.4** show that the majority of emigrants during the year ending 31st March 2022 had been in Guernsey for one to less than five years (34.8%). This differs to most previous years, with the exception of 2021, where the majority had been in Guernsey for less than one year. 19.2% of people emigrating during the year ending 31st March 2022 had been resident for less than one year, the lowest proportion in five years. 23.4% of people emigrating had been resident for twenty years or more prior to leaving during the year ending 31st March 2022. This compares to 17.4% five years earlier, during the year ending 31st March 2017.

There is 81% coverage for country of birth information for immigrants and 87% for emigrants. The information is sourced from Population Management, Health & Social Care and Environment & Infrastructure. See **page 16** for more information about country of birth.

Figure 2.3.5 and **Table 2.3.5** show information about the country of birth for people who have immigrated to Guernsey each year, over a five year period. Those born in the United Kingdom or Republic of Ireland have consistently made up the largest proportion of immigrants over the last five years. Since 2017, there has been a generally increasing trend in the proportion of immigrants born in countries not in Europe (9.0% during the year ending 31st March 2017, compared to 25.3% during the year ending 31st March 2022). The proportion of people born in countries outside of Europe was considerably higher for the year ending 31st March 2022 than the year ending 31st March 2021, when the proportion was 14.7%. It can also be seen that there were lower proportions of people immigrating to the island born in Latvia or "Other Europe" during the year ending 31st March 2022, when compared to previous years.

As can be seen in **Figure 2.3.6** and **Table 2.3.6**, 32.3% of people who emigrated from Guernsey during the year ending 31st March 2022 were born in the United Kingdom or Republic of Ireland, a higher proportion than in previous years. The proportion of people emigrating who were born in Guernsey also saw an increase when compared to previous years (20.4% for the year ending 31st March 2022).

Figure 2.3.5: Immigration by country of birth (during the years ending 31st March)
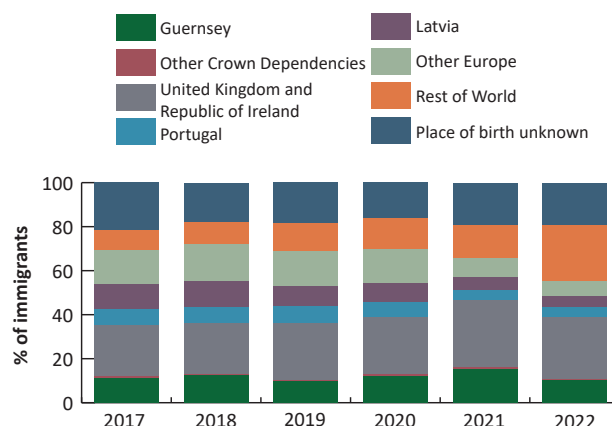
Table 2.3.5: Immigration by country of birth (during the years ending 31st March)

	Guernsey	Other Crown Dependencies	UK & ROI	Portugal	Latvia	Other Europe	Rest of World
2017	11.3	0.7	23.3	7.0	11.5	15.6	9.0
2018	12.4	0.6	23.2	7.1	11.9	16.7	10.0
2019	9.9	0.3	25.8	7.7	9.4	15.7	12.5
2020	12.1	0.7	26.0	6.7	8.8	15.3	14.4
2021	15.2	0.9	30.5	4.5	5.7	9.0	14.7
2022	10.2	0.7	27.8	4.9	4.6	7.0	25.3

Figure 2.3.6: Emigration by country of birth (during the years ending 31st March)
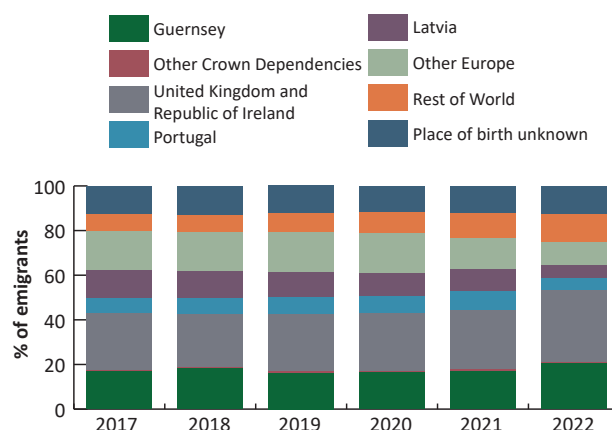
Table 2.3.6: Emigration by country of birth (during the years ending 31st March)

	Guernsey	Other Crown Dependencies	UK & ROI	Portugal	Latvia	Other Europe	Rest of World
2017	16.9	0.5	25.4	6.8	12.6	17.4	7.7
2018	18.0	0.5	24.2	7.1	11.9	17.8	7.3
2019	16.2	0.7	25.7	7.5	11.5	17.8	8.6
2020	16.3	0.7	25.9	7.7	10.2	17.9	9.5
2021	17.0	0.7	26.7	8.3	10.0	13.7	11.2
2022	20.4	0.7	32.3	5.2	5.8	10.4	12.7

The following pages contain an analysis of the 3,636 people that immigrated into Guernsey during the year ending 31st March 2017; five years before the latest population snapshot. This is the second time a longitudinal analysis has been undertaken using Rolling Electronic Census data.

As can be seen in **Table 2.4.1** and **Figure 2.4.1**, 21% of those that immigrated during the year ending 31st March 2017 were no longer ordinarily resident in Guernsey on 31st March 2017. Further analysis showed that 23% of those people subsequently returned to live in the island for one or more spell between 31st March 2017 and 31st March 2022.

38% were ordinarily resident in Guernsey on 31st March 2017 but were no longer ordinarily resident on 31st March 2022.

1% were ordinarily resident in Guernsey on 31st March 2017 but had died before 31st March 2022.

41% of those that immigrated during the year ending 31st March 2017 were ordinarily resident on 31st March 2022. A breakdown of the economic status of those people as at 31st March 2022 is provided on the next page.

Of those that were ordinarily resident on 31st March 2017:

• 48% were female and 52% were male

• 88% were aged between 16 and 64 (inclusive), 8% were aged 15 or under and 4% were aged 65 or over

• 68% (of all ages or 72% of those aged 16 to 64) were in full time education or were employed or self-employed on 31st March 2017

• Of the employed, 31% were employed in Hostelry, 12% in Public administration and 11% in Finance. Please note that those who are employed by the States of Guernsey, including medical and teaching staff, are captured within Public administration.

Table 2.4.1 Status of those that immigrated into Guernsey during the year ending 31st March 2017

	Count	% of total
Left before 31st March 2017	753	21%
Left after 31st March 2016 but before 31st March 2022	1,378	38%
Died before 31st March 2022	27	1%
Were in Guernsey on 31st March 2022	1,478	41%

Figure 2.4.1: Status of those that immigrated into Guernsey during the year ending 31st March 2017
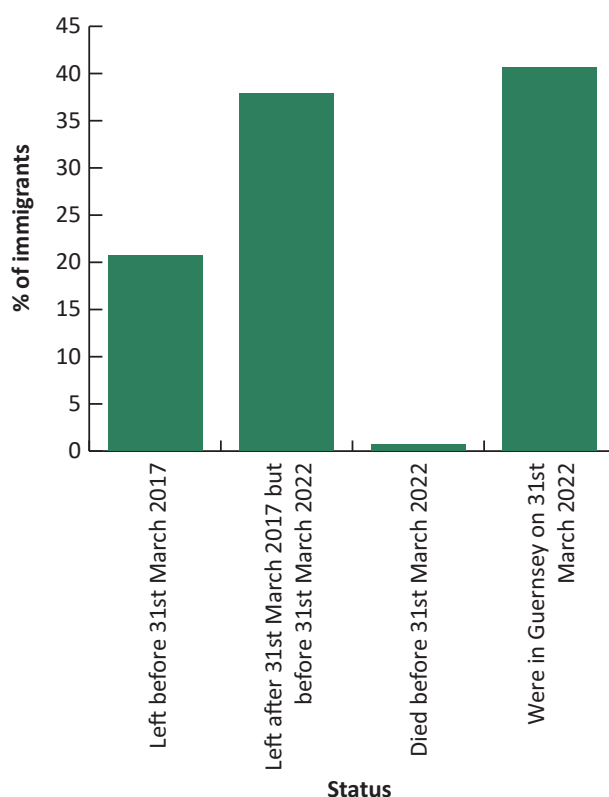
Figure 2.4.2: Economic status by gender and age (at 31st March 2022) of those that immigrated into Guernsey during the year ending 31st March 2017 and were ordinarily resident on 31st March 2022
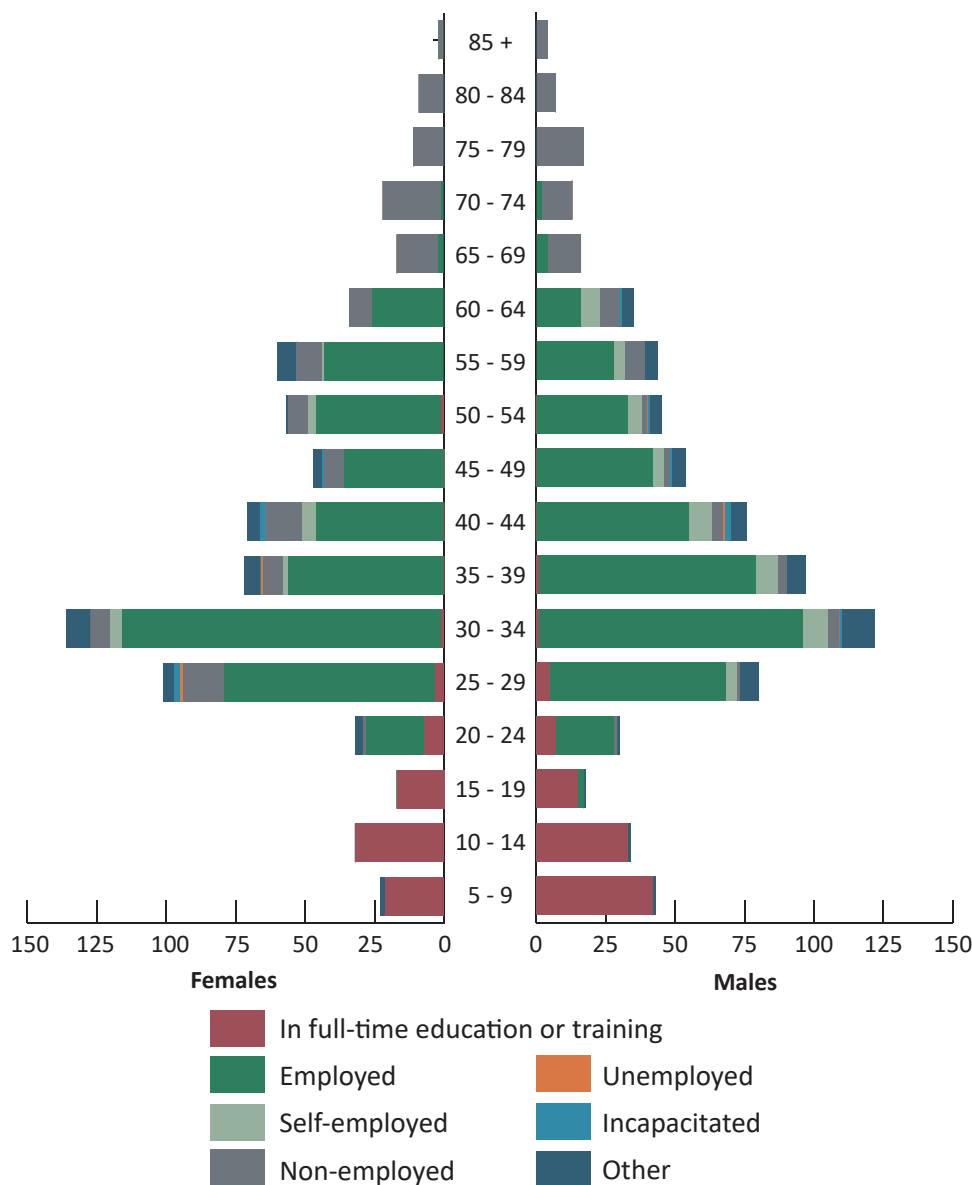
Figure 2.4.2 shows the economic status by age and gender of those that immigrated during the year ending 31st March 2017 and were still ordinarily resident in Guernsey on 31st March 2022. The equivalent information regarding the whole population is provided in **Section 8.2**.

78% (of all ages and 83% of those aged 16 to 64) were in full time education or were employed or self-employed on 31st March 2022. Of the employed, 17% were employed in Public administration, 15% in Finance and 14% in Hostelry. Please note that those who are employed by the States of Guernsey, including medical and teaching staff, are captured within Public administration.

On 31st March 2022, 3% of the total workforce (970 people) were people that had immigrated during the year ending 31st March 2017.

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

The female population has consistently been higher than the male population ranging between 50.8% and 50.4% of the total population. In March 2022, females constituted 50.5% of the population and males constituted 49.5%.

As shown in **Table 3.1.1** and **Figure 3.1.2**, the female population saw an increase of 0.6% in the year ending 31st March 2022. The male population increased by 0.7% between 31st March 2021 and 31st March 2022. Since 31st March 2012, the male population has grown by 368 people (1.2%) and the female population has increased by 258 people (0.8%).

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.

Comparing the median age of the male and female populations gives an indication of the differences in the two demographic profiles. In March 2022, the median age (i.e. the age of the person in the middle if everyone was to be ranked in age order) was 43 for males and 46 for females. This compares to 42 for males and 45 for females five years earlier, in March 2017.

More information on the age profiles of the male and female populations is provided on **page 14**.

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

	Females	Males	Annual % change in female population	Annual % change in male population
2012	31,938	31,147	0.2	0.4
2013	31,651	31,081	-0.9	-0.2
2014	31,537	30,804	-0.4	-0.9
2015	31,415	30,819	-0.4	<0.1
2016	31,384	30,824	-0.1	<0.1
2017	31,351	30,755	-0.1	-0.2
2018	31,427	30,863	0.2	0.4
2019	31,646	31,035	0.7	0.6
2020	31,790	31,145	0.5	0.4
2021	31,996	31,305	0.6	0.5
2022	32,196	31,515	0.6	0.7

Figure 3.1.1: Total population by gender (at 31st March)
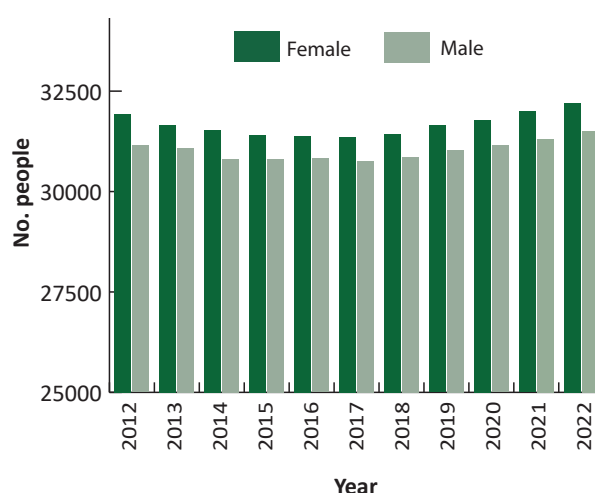
Figure 3.1.2: Total population change by gender (over years ending 31st March)
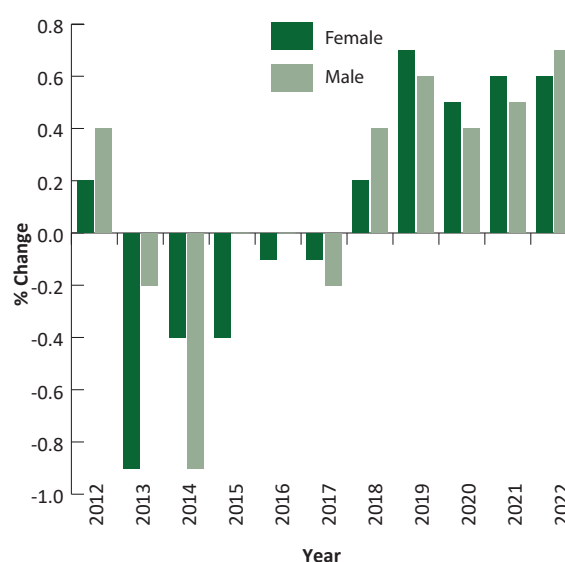
Figure 4.1.1 Annual percentage change in total population by age group

Table 4.1.1 Annual population changes

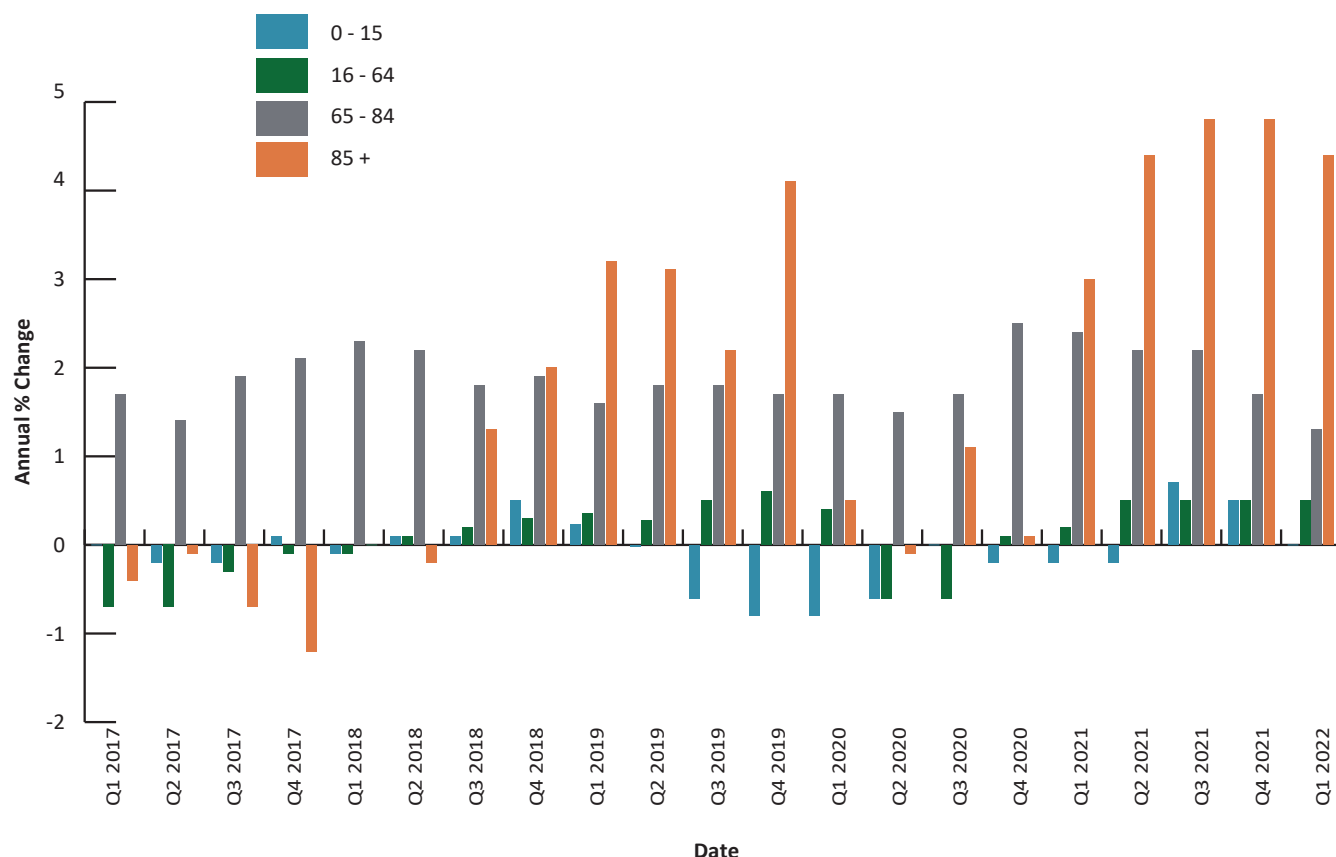|	0 - 15	Annual % change	16 - 64	Annual % change	65 - 84	Annual % change	85 +	Annual % change
Q1 2019	10,010	0.2	40,149	0.4	10,812	1.6	1,710	3.2
Q2 2019	9,992	0.0	40,453	0.3	10,902	1.8	1,724	3.1
Q3 2019	9,989	-0.6	40,449	0.5	10,945	1.8	1,727	2.2
Q4 2019	9,954	-0.8	40,220	0.6	10,959	1.7	1,752	4.1
Q1 2020	9,916	-0.9	40,302	0.4	10,998	1.7	1,719	0.5
Q2 2020	9,930	-0.6	40,227	-0.6	11,068	1.5	1,722	-0.1
Q3 2020	9,991	0.0	40,199	-0.6	11,136	1.7	1,746	1.1
Q4 2020	9,934	-0.2	40,280	0.1	11,231	2.5	1,753	0.1
Q1 2021	9,895	-0.2	40,372	0.2	11,264	2.4	1,770	3.0
Q2 2021	9,914	-0.2	40,441	0.5	11,315	2.2	1,798	4.4
Q3 2021	10,062	0.7	40,402	0.5	11,380	2.2	1,830	4.8
Q4 2021	9,985	0.5	40,845	0.5	11,426	1.7	1,838	4.8
Q1 2022	9,893	0.0	40,556	0.5	11,415	1.3	1,847	4.4

Table 4.1.1 and **Figure 4.1.1** show that during the year ending 31st March 2022 there was an annual increase of 0.5% in the 16 to 64 age group (184 people). The 65 to 84 and 85 and over age groups showed increases of 151 people (1.3%) and 77 people (4.4%) respectively, taking the number of people aged between 65 and 84 up to 11,415 and the number aged 85 and over up to 1,847. This is the highest number of people aged 85 and over since recent records began in 2008. The number of people in the 0 to 15 age category decreased slightly by 0.02% (2 people) to a total of 9,893 over the year ending 31st March 2022. This is the lowest total number of 0 to 15 year olds since recent records began in 2008.

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 2022, the overall dependency ratio was 0.57, which means that for every 100 people of working age (between the ages of 16 and 64) there were 57 people of dependent age (see **Figure 4.2.2**), the same number as in 2021 and seven more than in 2012 (**see Figure 4.2.1**).

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 on **page 14**.

Information on the proportion of the total population in employment can be found in **Section 4.3** on the next page and the proportion of people aged 65 and over in employment is available in **Section 8.1**.

Table 4.2.1: Dependency ratio (at 31st March)

	Dependency ratio
2012	0.50
2013	0.51
2014	0.53
2015	0.54
2016	0.54
2017	0.55
2018	0.56
2019	0.56
2020	0.56
2021	0.57
2022	0.57

Figure 4.2.1: Dependency ratio (at 31st March 2012)
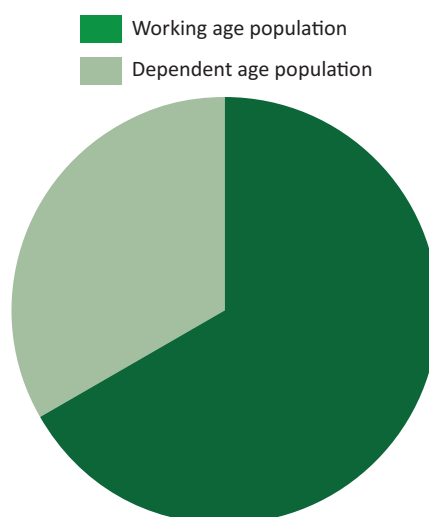
Figure 4.2.2: Dependency ratio (at 31st March 2022)
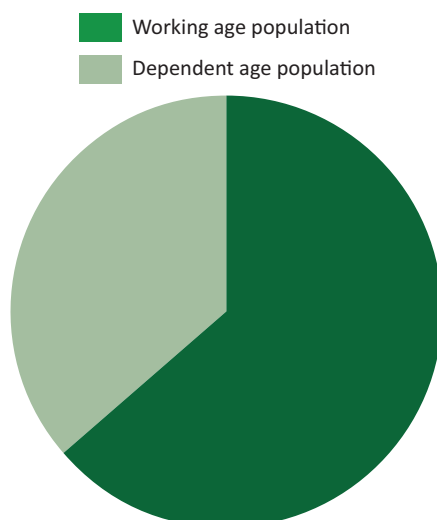
Table 4.3.1: Participation rate (at 31st March)

	% of total population in employment
2014	47.1
2015	47.2
2016	49.0
2017	49.9
2018	49.9
2019	49.8
2020	49.2
2021	48.2
2022	48.9

Participation rates are used to indicate the proportion of the total population in employment.

At the end of March 2022, 48.9% of the total population were either employed or self-employed, 0.7 percentage points higher than the previous year and 2.8 percentage points higher than at the end of March 2014 (see **Table 4.3.1** and **Figure 4.3.1**).

Figure 4.3.1: Participation rate (at 31st March 2022)

- Population in employment
- Population not in employment
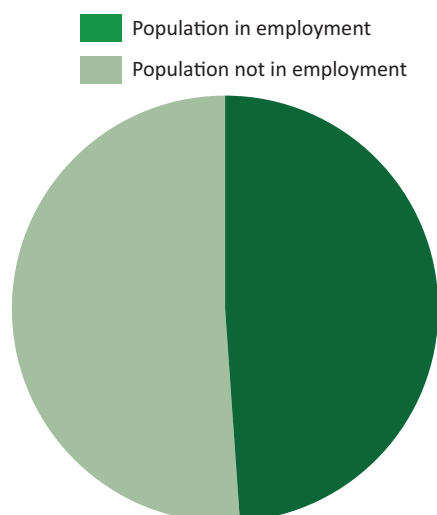
Age and gender distribution pyramids can be used to track changes in the population demographic over time. **Figure 4.4.1** provides a comparison of the distribution in 2022 compared with five years earlier in 2017 and ten years earlier in 2012.

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 54 age categories in 2012 to the 50 to 64 and 70 to 74 age groups in 2022. This bulge will move progressively further up the pyramid as the baby boom generation gets older.

The decline in the 40 to 49 age groups, for both males and females, between March 2012 and March 2022 and the growth in the 55 to 64 and 70 to 74 groups is quite pronounced in **Figure 4.4.1**.

In March 2022, the male population was higher than the female population in all age categories up to the age of 45 as a result of there typically being slightly more baby boys born than girls (see **Table 4.4.1**). In all subsequent age categories the female population is higher than the male population, with the exception of the 65 to 69 age group, due to the average life-span being longer for females than males.
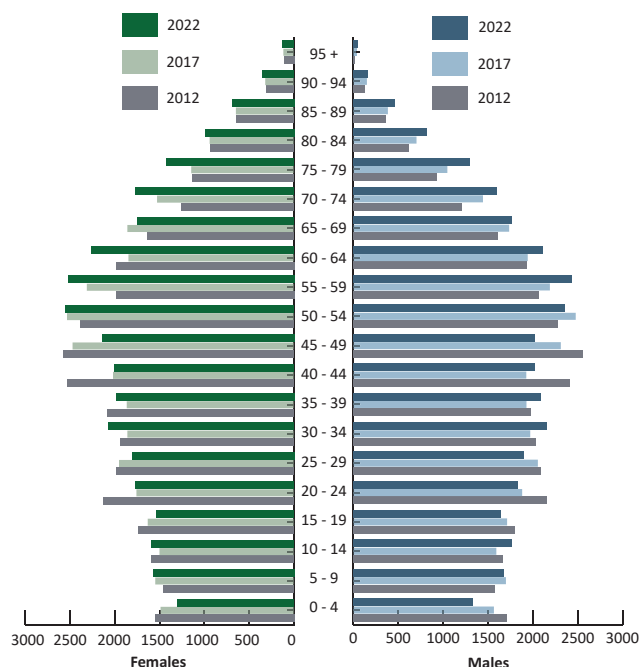
A table of the population by individual age is available in a spreadsheet format from **gov.gg/population**.

Figure 4.4.1: Age and gender distribution (at 31st March)

Table 4.4.1: Age and gender distribution (at 31st March)

	2017			2022		
	Female	**Male**	**Total**	**Female**	**Male**	**Total**
0 - 4	1,489	1,566	3,055	1,297	1,330	2,627
5 - 9	1,548	1,700	3,248	1,573	1,674	3,247
10 - 14	1,501	1,593	3,094	1,588	1,771	3,359
15 - 19	1,632	1,713	3,345	1,538	1,642	3,180
20 - 24	1,758	1,881	3,639	1,767	1,838	3,605
25 - 29	1,952	2,056	4,008	1,808	1,902	3,710
30 - 34	1,859	1,971	3,830	2,067	2,156	4,223
35 - 39	1,866	1,929	3,795	1,985	2,085	4,070
40 - 44	2,019	1,927	3,946	2,000	2,028	4,028
45 - 49	2,470	2,312	4,782	2,141	2,019	4,160
50 - 54	2,532	2,478	5,010	2,548	2,363	4,911
55 - 59	2,311	2,190	4,501	2,522	2,431	4,953
60 - 64	1,847	1,943	3,790	2,260	2,116	4,376
65 - 69	1,859	1,736	3,595	1,744	1,768	3,512
70 - 74	1,528	1,444	2,972	1,768	1,602	3,370
75 - 79	1,147	1,047	2,194	1,422	1,296	2,718
80 - 84	942	703	1,645	994	821	1,815
85 - 89	649	384	1,033	692	461	1,153
90 - 94	322	150	472	350	164	514
95 +	120	32	152	132	48	180
Total	31,351	30,755	62,106	32,196	31,515	63,711

Table 5.1.1: Length of stay by age (at 31st March 2022)

	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	583	2,044	-	-	-	-	2,627
5 - 9	100	275	2,872	-	-	-	3,247
10 - 14	71	173	273	2,842	-	-	3,359
15 - 19	66	144	164	211	2,595	-	3,180
20 - 24	205	366	113	128	187	2,606	3,605
25 - 29	274	529	248	83	112	2,464	3,710
30 - 34	238	551	451	230	106	2,647	4,223
35 - 39	176	445	389	325	256	2,479	4,070
40 - 44	149	344	330	370	360	2,475	4,028
45 - 49	109	321	295	308	341	2,786	4,160
50 - 54	111	325	238	309	348	3,580	4,911
55 - 59	83	264	214	204	311	3,877	4,953
60 - 64	51	189	133	161	212	3,630	4,376
65 - 69	*	70	61	91	133	3,138	3,512
70 - 74	*	45	55	60	84	3,109	3,370
75 - 79	*	46	37	53	67	2,508	2,718
80 - 84	*	28	31	25	37	1,692	1,815
85 - 89	*	*	*	*	*	1,102	1,153
90 - 94	*	*	*	*	*	484	514
95 +	*	*	*	*	*	168	180
Total	2,265	6,177	5,928	5,420	5,176	38,745	63,711

* is used in instances where there are fewer than 20 people in any one category.

Figure 5.1.1: Length of stay by age as a percentage of population by age group (at 31st March 2022)
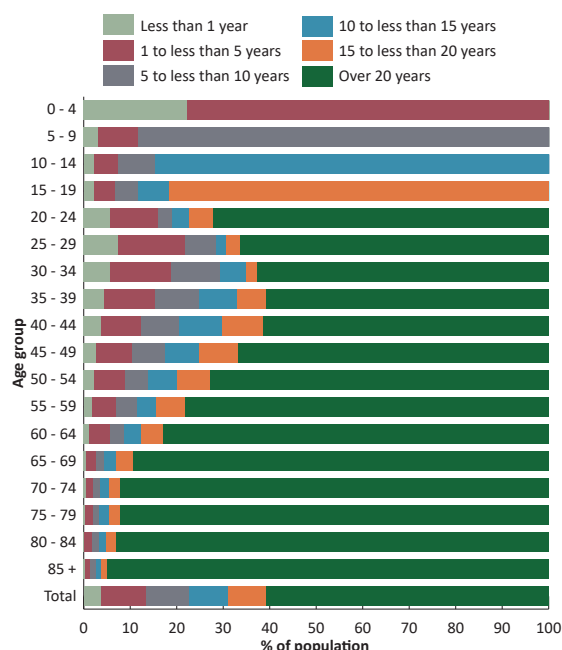
The length of time a person has been resident in the island can be calculated using the Rolling Electronic Census system. The length of stay could be from one continuous stay or more than one separate stay. These figures should be viewed as minimum lengths of stay, since historic information is only available from 1992 onwards (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, at the end of March 2022, 60.8% of the population had 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 age category contains the lowest proportion of people that have been resident for over 20 years, at 60.9%.

The 25 to 29 age category saw the highest proportion of people that had been resident for less than one year (7.4%), with the exception of the 0 to 4 age group. The total number of people that had been resident for less than one year increased by 486 people (27%) between 31st March 2021 and 31st March 2022 (from 1,779 to 2,265 people). It is likely that the travel restrictions in place during 2020 and early 2021 had a large impact on migration, for example of seasonal workers to support hostelry and other tourist-based activities.

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

Information on country of birth is available for 89% of the population and is sourced from Population Management, Health & Social Care and Environment & Infrastructure. This is an increase of 7% since 2014 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) in **Table 5.2.1** and **Figure 5.2.1** are considered reliable for the whole population.

People born in Guernsey made up the largest proportion of the population at the end of March 2022 (59.8%). Those born in the United Kingdom or the Republic of Ireland made up the next highest proportion, at 26.6%. Those born in the Rest of the World represented, 5.9%, 3,355 people, an increase of 466 people from the end of March 2021.

Table 5.2.2 shows that people born in Guernsey or other Crown Dependencies were most likely to have been resident in the island for over 20 years. Those born in Latvia were least likely to have been resident for over 20 years.

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. Information by the full list of countries of birth is available in spreadsheet format from **gov.gg/population**.

Table 5.2.1: Country of birth (at 31st March 2022)

	No. people	% of total population	% of people with known country of birth
Guernsey	34,080	53.5	59.8
Other Crown Dependencies	433	0.7	0.8
United Kingdom and Republic of Ireland	15,159	23.8	26.6
Portugal	1,341	2.1	2.4
Latvia	885	1.4	1.6
Other Europe	1,702	2.7	3.0
Rest of world	3,355	5.3	5.9
Place of birth unknown	6,756	10.6	-
Total	63,711	100	100

Figure 5.2.1: Country of birth as a percentage of people with known country of birth (at 31st March 2022)

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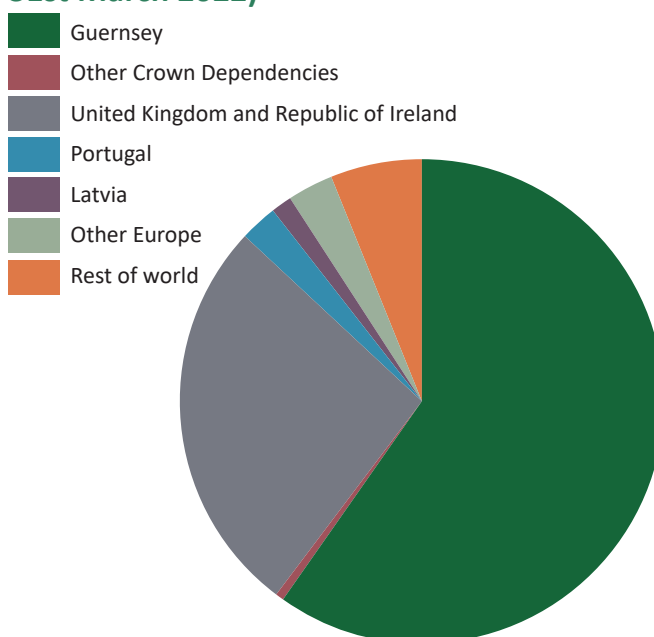- Portugal
- Latvia
- Other Europe
- Rest of world

Table 5.2.2: Length of stay by country of birth (at 31st March 2022)

	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	409	1,996	420	1,434	2,705	27,116	34,080
Other Crown Dependencies	11	30	24	25	32	311	433
United Kingdom and Republic of Ireland	506	1,517	1,355	1,370	1,508	8,903	15,159
Portugal	50	266	253	174	137	461	1,341
Latvia	39	203	180	217	199	47	885
Other Europe	104	417	320	211	162	488	1,702
Rest of world	617	976	477	336	292	657	3,355
Place of birth unknown	529	772	2,899	1,651	143	762	6,756
Total	2,265	6,177	5,928	5,418	5,178	38,745	63,711

Table 5.3.1: Population by residence status (at 31st March 2022)

	No. people	% of total population
Employment related	3,211	5.0
Non-employment related or Established Resident	1,111	1.7
Family	2,747	4.3
Open Market	1,759	2.8
Permanent Resident	38,717	60.8
No document	16,166	25.4
Total	63,711	100.0

Figure 5.3.1: Population by residence status (at 31st March 2022)

- Employment related
- Non-employment related or Established Resident
- Family
- Open Market
- Permanent Resident
- No document
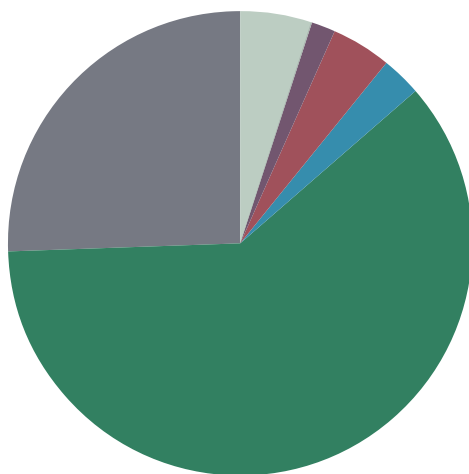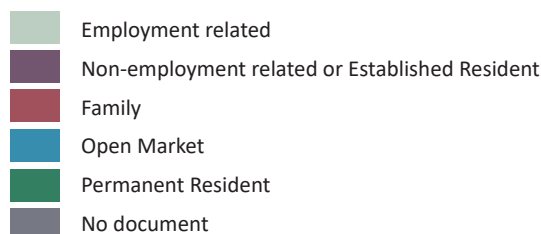
The principal means of managing population in Guernsey is through the administration of the Population Management (Guernsey) Law 2016 which came into force on 3rd April 2017. This superceded the Housing (Control of Occupation) (Guernsey) Law, 1994. However, licences and other documents issued under the Housing Law could continue to be live. Data presented here is based on a mixture of permits, certificates, licences and other documents issued since 1994.

At the end of March 2022, as shown in **Table 5.3.1**, Permanent Residents made up 60.8% of the population. 5.0% of people had a residence status dependent on their employment. People whose residence was dependent on living in Open Market accommodation constituted 2.8% of the population. The "Family" category consists of people who live in the Local Market and whose ability to remain in the island is dependent on a family member's residence status, this related to 4.3% of the population. 1.7% of the population were permitted to reside in Guernsey for reasons not dependent on employment, accommodation or family. This includes Established Residents who have been resident on the island for 8 consecutive years or more but do not yet have Permanent Resident status.

The remaining portion of the population had no document (see **Figure 5.3.1**). People may legitimately be resident and have no document if they are under 16 years old and are not in employment, 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.

Information on residence status and employment as at the end of September 2022 can be found in **Section 9.3**.

For more information on residence status, please see **gov.gg/populationmanagement**.

Residence status can also be broken down by age, economic status and length of stay (see **page 19**). At the end of March 2022, 20% of Permanent Residents (7,655 people) were aged 50 to 59, the highest proportion for that residence status (see **Table 5.3.2**). 52% of people whose residence status was dependent on their employment were aged between 20 and 39 (1,675 people).

63% of people with no document were aged 19 or under (10,218 people). People under 16 years of age do not need to have an official residence status unless they are employed.

As shown in **Figure 5.3.2**, the 30 to 34 age group had the highest proportion of people with a residence status dependent on their employment (13%).

10% of 30 to 34 year olds and 35 to 39 year olds were dependent on a family member's residence status to reside in Guernsey (see **Figure 5.3.2**).

The proportion of people with Permanent Resident status was highest in every age group other than ages 0 to 14 and 85 and over where the highest proportion of people had no document (see **Figure 5.3.2**).

Information on residence status and employment as at the end of September 2022 can be found in **Section 9.3**.

Table 5.3.2: Residence status by age (at 31st March 2022)

	Employment related	Non-employment related or Established Resident	Family	Open Market	Permanent Resident	No document
Under 10	0	*	*	*	*	5,837
10 to 19	*	54	161	66	1,860	4,381
20 to 29	687	146	489	263	5,253	477
30 to 39	988	253	853	318	5,410	471
40 to 49	725	310	614	292	5,748	499
50 to 59	611	198	394	389	7,655	617
60 to 69	179	83	145	262	6,393	826
70 to 79	*	37	60	123	4,458	1,406
80 to 89	0	*	*	32	1,694	1,215
90 and over	0	*	*	*	236	437
Total	3,211	1,111	2,747	1,759	38,717	16,166

* is used in instances where there are fewer than 20 people in any one category

Figure 5.3.2: Residence status by age (at 31st March 2022)
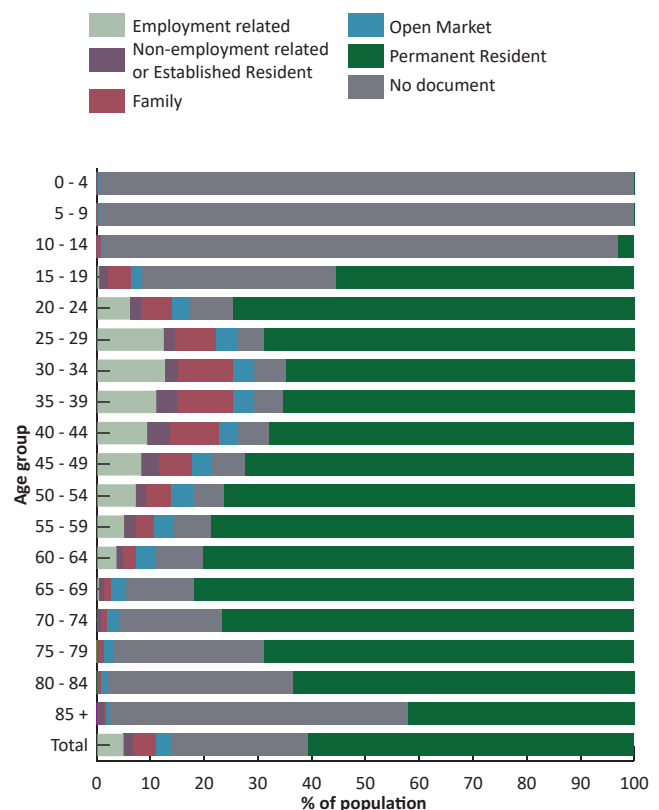
Table 5.3.3: Residence status by economic status (at 31st March 2022)

	Employment related	Non-employment related or Established Resident	Family	Open Market	Permanent Resident	No document
Employed	2,902	760	1,894	1,050	20,461	992
Full-time education	*	73	185	79	2,352	7,783
Incapacitated	*	21	*	*	781	*
Non-employed	*	140	356	402	11,223	3,978
Self-employed	93	54	109	111	2,467	265
Unemployed	0	*	*	*	260	*
Other	200	58	185	105	1,173	3,125
Total	3,211	1,111	2,747	1,759	38,717	16,166

* is used in instances where there are fewer than 20 people in any one category

Figure 5.3.3: Residence status by economic status (at 31st March 2022)
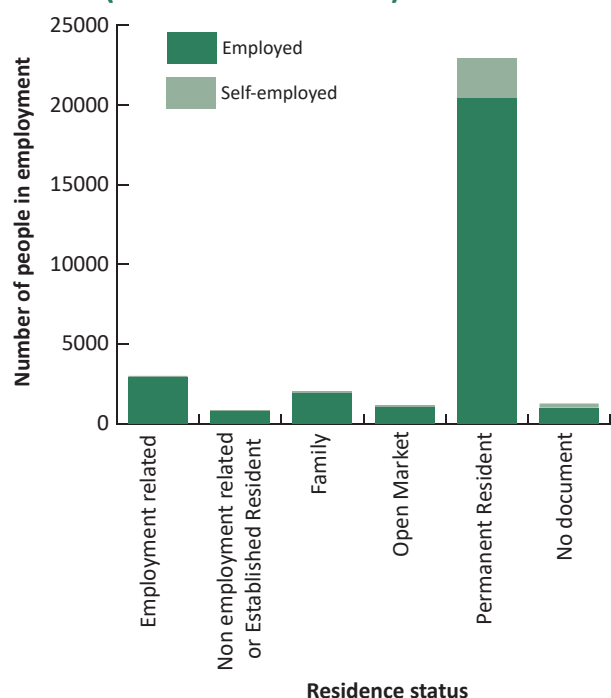
Table 5.3.3 shows residence status by economic status. At the end of March 2022, 69% of people whose residence was dependent on a family member were employed (1,894 people) and 7% were in full time education (185 people). 60% of people whose residence was dependent on living in Open Market accommodation and 68% who were resident for non-employment related reasons were employed at the end of March 2022 (1,050 and 760 people respectively).

Permanent Residents accounted for 74% of all employed and self-employed people (see **Figure 5.3.3**) on 31st March 2022.

Table 5.3.4 shows that 1,348 people (42%) with an employment related residence status had been resident on the island for 1 to less than 5 years. 734 people (23%) had been resident for less than 1 year.

89% of Permanent Residents had been resident on the island for over 20 years (34,352 people), compared to 16% (288 people), 4% (101 people) and 2% (65 people) of those whose residence was dependent on Open Market accommodation, a family member or employment respectively.

Information on residence status and employment as at the end of September 2022 can be found in **Section 9.3**.

Table 5.3.4: Residence status by length of stay (at 31st March 2022)

	Employment related	Non-employment related or Established Resident	Family	Open Market	Permanent Resident	No document
Less than 1 year	734	17	249	193	8	1,064
1 to less than 5 years	1,348	55	997	510	60	3,207
5 to less than 10 years	689	291	828	253	146	3,721
10 to less than 15 years	265	418	407	289	811	3,228
15 to less than 20 years	110	109	165	226	3,340	1,228
Over 20 years	65	221	101	288	34,352	3,718
Total	3,211	1,111	2,747	1,759	38,717	16,166

5.4 Household composition

People can be grouped up into households by address, to indicate the number and characteristics of people living at each self-contained residential property unit. The data presented here is a snapshot of the composition of all households as at 31st March.

The figures presented in **Table 5.4.1** are higher than those presented in the **Guernsey Household Income Report** (available at **www.gov.gg/household**), which provides information based on a sample of households, rather than all households.

People for whom a precise address was not known on the snapshot date cannot be grouped into households and are not included in **Section 5.4**. In some cases, no address is stored. In some, a building or road name is known, but not exactly which housing unit the person resides within. In other cases, the address provided is one for temporary/emergency housing and a more permanent residential address is unknown. A separate piece of work is underway to measure the level of homelessness in the island, which is planned to be published later this year.

There was a minimum of 25,244 households living in Guernsey on 31st March 2022, compared to 25,032 the previous year and 24,280 five years earlier, in 2017 (see **Table 5.4.1**). The average number of people per household has remained stable since 2017.

The ten most common household types, presented in **Table 5.4.2**, describe 94.9% of all households as at March 2022. 27.3% were one adult households without child(ren) and 32.2% were two adult households without child(ren).

Table 5.4.1: Minimum number of households (at 31st March)

	Minimum number of households	Average number of people per household
2017	24,280	2.5
2018	24,353	2.5
2019	24,561	2.5
2020	24,797	2.5
2021	25,032	2.5
2022	25,244	2.5

Please note that the figures presented in **Table 5.4.1** have been revised since the last edition of this report. The processes for determining each person's address in the Rolling Electronic Census were updated in late 2022 to incorporate additional sources of address data in order to improve accuracy. The update is applied retrospectively as well as to the latest information, so all the figures have been updated to ensure continuity of the time series. The change has resulted in a slight uplift in the number of people with unknown address throughout the time series, but greater confidence in the addresses of those with known addresses.

Table 5.4.2: Household composition type (at 31st March 2022)

| Composition Type	No. people	Minimum no. households	% of total households
One adult aged 16 to 64	3,870	3,870	15.3
One adult aged 65 or over	3,026	3,026	12.0
One adult aged 16 to 64 and one or more child aged 15 or under	2,214	865	3.4
Two adults both aged 16 to 64	8,044	4,022	15.9
Two adults, one aged 16 to 64 and one aged 65 or over	2,732	1,366	5.4
Two adults both aged 65 or over	5,478	2,739	10.9
Two adults both aged 16 to 64 and one or more child aged 15 or under	12,073	3,237	12.8
Three or four adults all aged 16 to 64	7,918	2,366	9.4
Three or four adults aged 16 to 64 or 65 or over	4,218	1,299	5.1
Three or four adults all aged 16 to 64 and one or more child aged 15 or under	5,632	1,175	4.7
Other	7,768	1,279	5.1
Address unknown	738	-	-
Total	63,711	25,244	100.0

5.4 Household composition

Table 5.4.3 and **Figure 5.4.1** show the change in household composition over time. It can be seen that the proportion of all one adult households increased between 2017 and 2022, with the largest increase seen in One adult aged 16 to 64 households (from 14.8% in 2017 to 15.3% in 2022, see **Figure 5.4.1**). The proportion of all households with at least one person aged 65 or more saw an increase between 2017 and 2022. In contrast, households containing two or more adults aged 16 to 64 decreased between the same time period.

One adult aged 16 to 64 households saw the largest increase in the number of households between 2017 and 2022 (an increase of 298 households, see **Table 5.4.3**), whilst the largest decrease was seen in the number of Three or four adults all aged 16 to 64 households and Two adults both aged 16 to 64 and one or more child aged 15 or under households (decreases of 114 and 78 households respectively).

Table 5.4.3: Minimum number of households by household composition type (at 31st March)

Composition Type	2017	2018	2019	2020	2021	2022
One adult aged 16 to 64	3,572	3,618	3,699	3,802	3,755	3,870
One adult aged 65 or over	2,797	2,815	2,869	2913	2,977	3,026
One adult aged 16 to 64 and one or more child aged 15 or under	797	826	822	844	838	865
Two adults both aged 16 to 64	4,009	3,986	4,020	3,948	4,039	4,022
Two adults, one aged 16 to 64 and one aged 65 or over	1,208	1,255	1,248	1,266	1,312	1,366
Two adults both aged 65 or over	2,541	2,571	2,633	2,648	2,683	2,739
Two adults both aged 16 to 64 and one or more child aged 15 or under	3,315	3,283	3,281	3,146	3,138	3,237
Three or four adults all aged 16 to 64	2,408	2,437	2,406	2,444	2,392	2,366
Three or four adults aged 16 to 64 or 65 or over	1,103	1,129	1,170	1,236	1,311	1,299
Three or four adults all aged 16 to 64 and one or more child aged 15 or under	1,201	1,159	1,165	1,210	1,206	1,175
Other	1,257	1,274	1,248	1,340	1,381	1,279
Total	24,280	24,353	24,561	24,797	25,032	25,244

Figure 5.4.1: Proportion of households by household composition type (at 31st March)
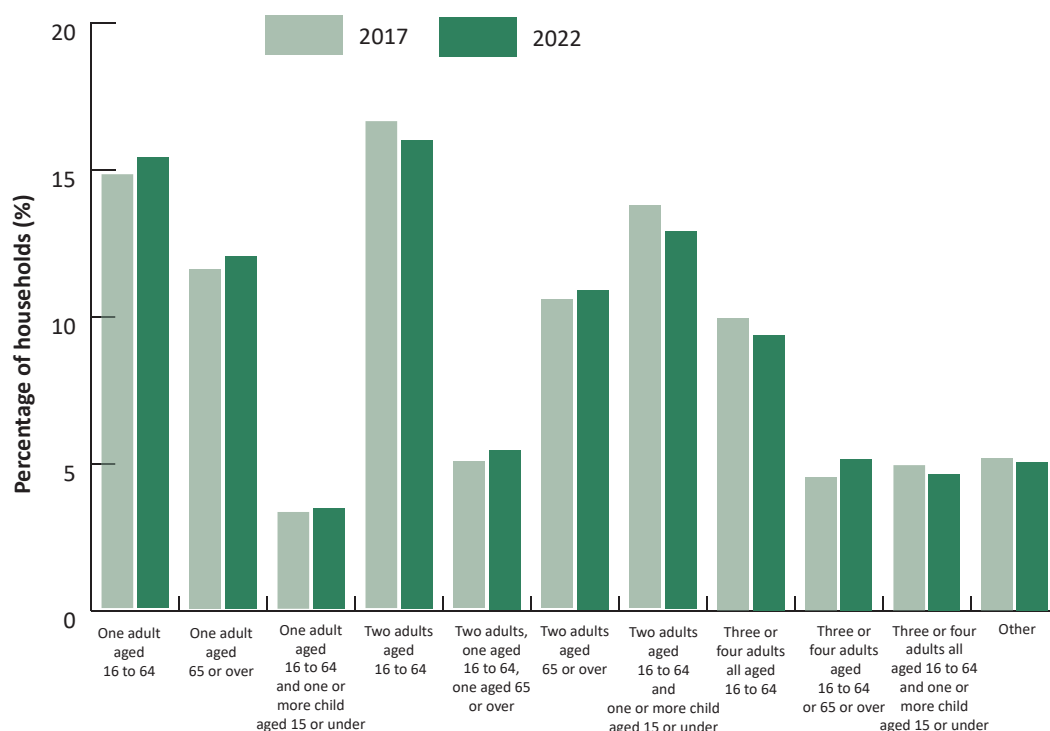
Please note that the figures presented in **Table 5.4.3 and Figure 5.4.1** have been revised since the last edition of this report. The processes for determining each person's address in the Rolling Electronic Census were updated in late 2022 to incorporate additional sources of address data in order to improve accuracy. The update is applied retrospectively as well as to the latest information, so all the figures have been updated to ensure continuity of the time series. The change has resulted in a slight uplift in the number of people with unknown address throughout the time series, but greater confidence in the addresses of those with known addresses.

Table 6.1.1: Population and population density by parish (at 31st March 2022)

	No. people	% of total population	Population density (people per square kilometre)
Castel	8,774	13.8	860
Forest	1,584	2.5	386
St. Andrew	2,348	3.7	522
St. Martin	6,662	10.5	913
St. Peter Port	19,354	30.4	3,024
St. Pierre Du Bois	2,022	3.2	326
St. Sampson	9,068	14.2	1,439
St. Saviour	2,858	4.5	447
Torteval	1,044	1.6	337
Vale	9,613	15.1	1,080
Herm and Jethou	80	0.1	70
Address unknown	304	0.5	-
Total	63,711	100	1,002

Figure 6.1.1: Population density map (at 31st March 2022)
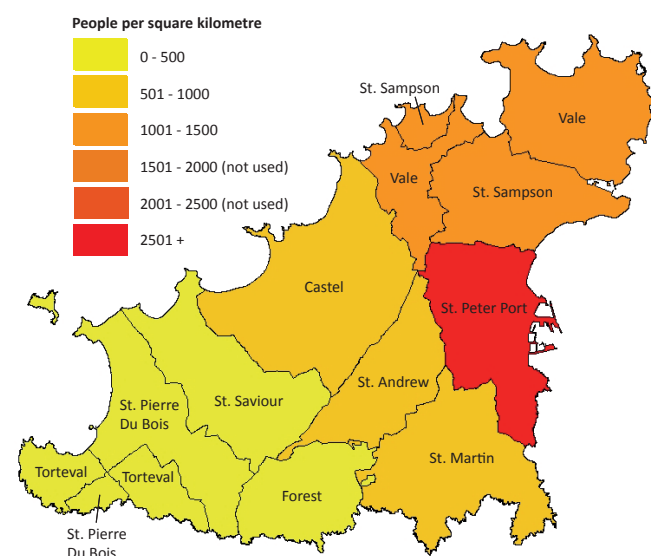
The spatial population analysis presented in **Sections 6 and 7** is based on people's residential address, collated from all information sources linked into the Rolling Electronic Census system. There is an automated process to determine which address is the most up-to-date and reliable one to use for each person. The coverage was 99.5% in March 2022 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 had the highest population and the highest population density at 19,354 people (30.4% of the population) and 3,024 people per square kilometre at the end of March 2022. 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 and is the smallest parish by area. St. Pierre du Bois and Torteval had the lowest population density at the end of March 2022 (with 326 and 337 people per square kilometre respectively), around nine times lower than St. Peter Port.

Population densities are mapped in **Figure 6.1.1**.

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

Table 6.1.2: Percentage of population by age group and parish (at 31st March 2022)

	Castel	Forest	St. Andrew	St. Martin	St. Peter Port	St. Pierre Du Bois	St. Sampson	St. Saviour	Torteval	Vale	Herm and Jethou
0 - 15	16.9	15.4	17.5	17.2	14.8	13.9	14.6	15.9	15.3	15.6	20.0
16 - 64	57.9	60.5	59.9	60.7	70.2	60.1	63.1	60.7	58.5	61.0	80.0
65 - 84	20.9	21.3	20.2	18.3	13.1	22.7	19.5	20.4	22.5	20.3	0.0
85 +	4.3	2.8	2.4	3.8	1.9	3.3	2.8	3.1	3.6	3.1	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

Table 6.2.1: Population by primary school catchment area and age (at 31st March 2022)

|	0	1	2	3	4	5	6	7	8	9	10	11
Amherst Primary	79	93	81	71	107	84	85	91	94	94	78	77
Castel Primary	29	35	49	37	51	57	67	54	73	81	79	68
Forest Primary	14	10	11	14	16	25	16	16	25	16	24	22
Hautes Capelles Primary	44	51	66	43	69	70	57	65	80	64	74	68
La Houguette Primary	40	34	43	36	46	53	62	61	70	72	79	71
La Mare de Carteret Primary	49	35	45	46	50	56	58	69	56	69	67	69
St Martins Primary	58	63	75	82	74	93	100	77	87	90	107	78
Vale Primary	87	82	63	82	98	93	84	92	87	95	106	102
Vauvert Primary	101	83	87	100	97	87	114	94	95	118	96	98
Address Unknown	1	0	0	0	0	0	0	1	0	0	0	1
Total	502	486	520	511	608	618	643	620	667	699	710	654

Primary Schools in Guernsey accept children from a specific area of the island known as the school's catchment area. Each child will normally attend the school in the catchment area where they live. **Table 6.2.1** shows which school catchment area people of pre-school and primary school age lived in on 31st March 2022.

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 along with special school, Le Rondin, 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.

In September 2019, a 'Partner School' system was implemented for Year 7 Secondary admissions, instead of allocation by catchment area. The Partner School model means children from groups of Primary Schools are placed at their Primary School's Partner Secondary School site, even if they no longer live within the catchment area of the Primary School that they currently attend. As a result, information regarding population by High School catchment is no longer included in this report. More information on the Partner School system is available at **www.gov.gg/partnerschools**.

Figure 6.2.1: School catchment area map
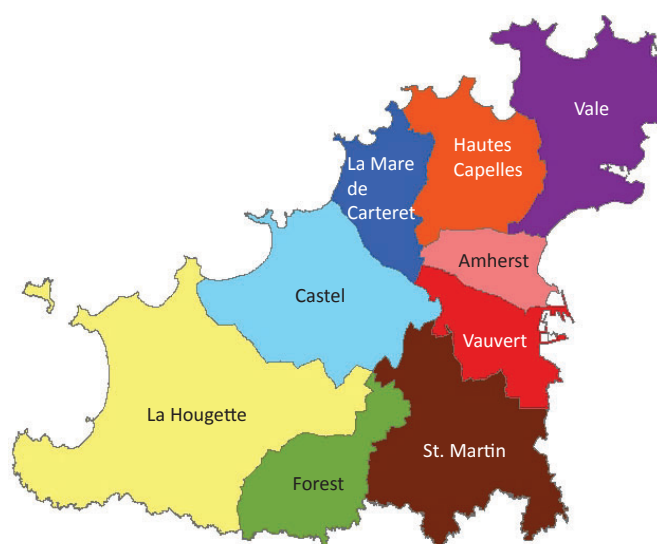
See **gov.gg/catchmentareas** for catchment area maps in more detail.

Table 7.1.1: Population by Housing Market (at 31st March 2022)

	No. people	% of total population
Local Market	58,332	91.6
Open Market part A	3,138	4.9
Open Market part B	417	0.7
Open Market part C	172	0.3
Open Market part D	914	1.4
Address unknown	738	1.2
Total	63,711	100.0

Figure 7.1.1: Population by Housing Market (at 31st March 2022)
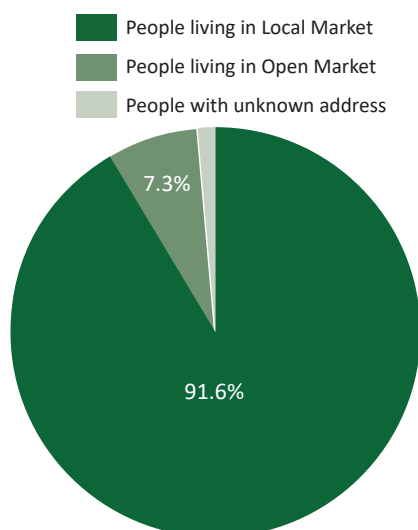
Figure 7.1.2: Population by Open Market part (at 31st March 2022)
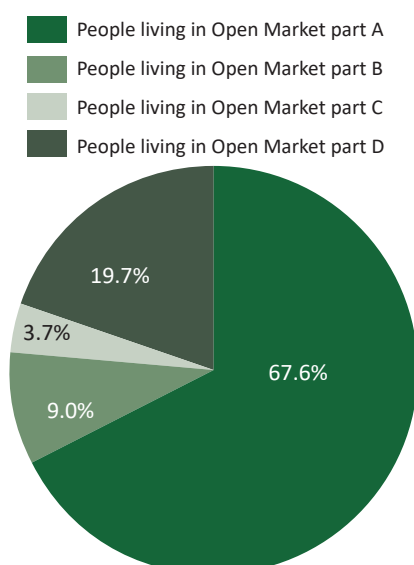
Details relating to the specific property a person lives in (e.g. the housing market and tenure), are also based on the person's residential address. The number of unknown addresses is higher at this level of detail (and throughout **Section 7**), since the specific apartment or flat number or name is needed (compared to **Section 6**, 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. In some cases, the address provided is one for temporary/ emergency housing and a more permanent residential address is unknown. A separate piece of work is underway to measure the level of homelessness in the island, which is planned to be published later this year.

The island's housing stock is split into two categories: Open Market and Local Market. The Population Management Law currently 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 **gov.gg/populationmanagement** for more information).

As shown in **Table 7.1.1** and **Figure 7.1.1**, 91.6% of the population lived in Local Market property units at the end of March 2022.

7.3% of the population lived in Open Market property units. The majority of that portion (67.6%) 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**.

7.2 Population by tenure

The housing tenure categories presented here are the same as those used in the **Residential Property Stock Bulletin**.

In this Report, the "Other" tenure category includes: hotels, the hospital, the prison, lodging houses, staff and self-catering accommodation. The **Residential Property Stock Bulletin** only includes information on domestic housing units, which does not include some of the above, and does include vacant units, which do not feature here.

Table 7.2.1 and **Figure 7.2.1** include both Local and Open Market residents (further breakdown by Market is included on **page 27**). It can be seen that 63.8% of the population lived in private owner occupied accommodation at the end of March 2022 compared with 21.6% in private rental accommodation. 9.4% lived in affordable social housing whilst 0.9% lived in affordable intermediate (partial ownership) properties.
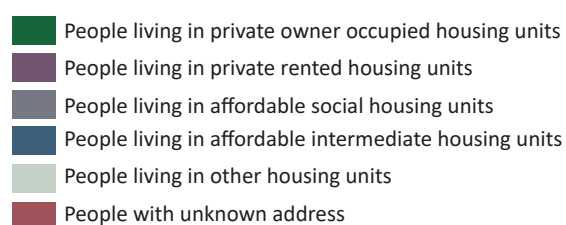
Specialised housing includes units which involve some element of care. Residential and nursing homes as well as any extra care accommodation are categorised as specialised. **Table 7.2.2** shows that at the end of March 2022, 1% of the population lived in specialised housing (0.7% in the private market and 0.3% in the affordable market). 29% of all people living in specialised housing were in the affordable market.

Of the 63,711 total, 1.1% of the population (731 people) lived in accommodation that specifically catered for those aged over 55 at the end of March 2022. Of this 1.1%, 11% lived in specialised housing.

Table 7.2.1: Population by housing tenure (at 31st March 2022)

		No. people	% of total population
Private market	**Owner occupied**	40,635	63.8
	Rented	13,765	21.6
Affordable market	**Social**	5,988	9.4
	Intermediate	560	0.9
	Other	2,025	3.2
	Address unknown	738	1.2
	Total	63,711	100

Figure 7.2.1: Population by housing tenure (at 31st March 2022)

Legend:
- People living in private owner occupied housing units
- People living in private rented housing units
- People living in affordable social housing units
- People living in affordable intermediate housing units
- People living in other housing units
- People with unknown address

Table 7.2.2: Population by Specialised housing (at 31st March 2022)

		No. people	% of total population
Specialised	**Private market**	451	0.7
	Affordable market	181	0.3
Non-specialised	**Private market**	53,949	84.7
	Affordable market	6,367	10.0
	Other	2,025	3.2
	Address unknown	738	1.2
	Total	63,711	100

Table 7.2.3: Population by housing tenure (at 31st March)

|		2017	2018	2019	2020	2021	2022
Private market	**Owner occupied**	39,679	39,878	39,819	40,009	40,299	40,635
	Rented	13,809	13,571	13,859	14,039	13,972	13,765
Affordable market	**Social**	5,890	5,934	5,908	5,884	5,991	5,988
	Intermediate	373	400	435	496	544	560
	Other	1,902	1,906	2,170	2,188	2,113	2,025
	Address unknown	540	618	601	539	529	738
	Total	62,193	62,307	62,792	63,155	63,448	63,711

Note: these figures are first estimates and are not changed retrospectively unlike total population figures and those broken down by age

Table 7.2.3 and **Figure 7.2.2** show the change in the number of people living in each tenure over time. It can be seen that there has been little change in the number of people living in each tenure over the last five years.

The proportion of people living in owner occupied properties was the same in March 2017 and March 2021. The proportion of people living in private rental accommodation decreased (by 0.6 percentage points). In contrast, the proportion of those living in affordable intermediate housing increased by 0.3 percentage points between 2017 and 2021, whilst the proportion in affordable social housing decreased by 0.1 percentage points.

There has been an increase in the proportion of the population for which States of Guernsey services do not hold a precise residential address. In some cases, no address is stored. In some, a building or road name is known, but not exactly which housing unit the person resides within. In other cases, the address provided is one for temporary/emergency housing and a more permanent residential address is unknown. A separate piece of work is underway to measure the level of homelessness in the island, which is planned to be published later this year.

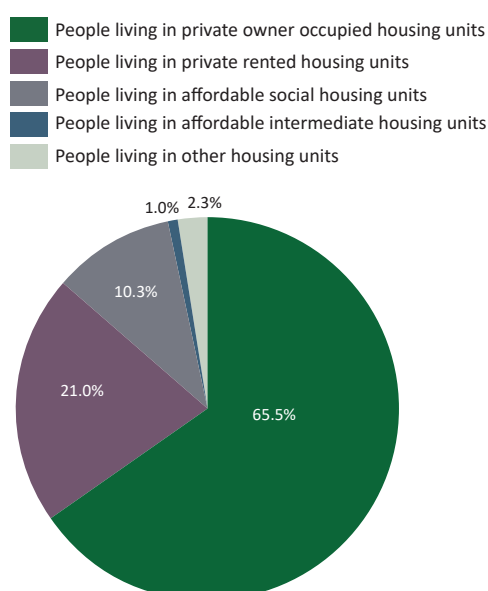## Figure 7.2.2: Proportion of population by housing tenure (at 31st March)
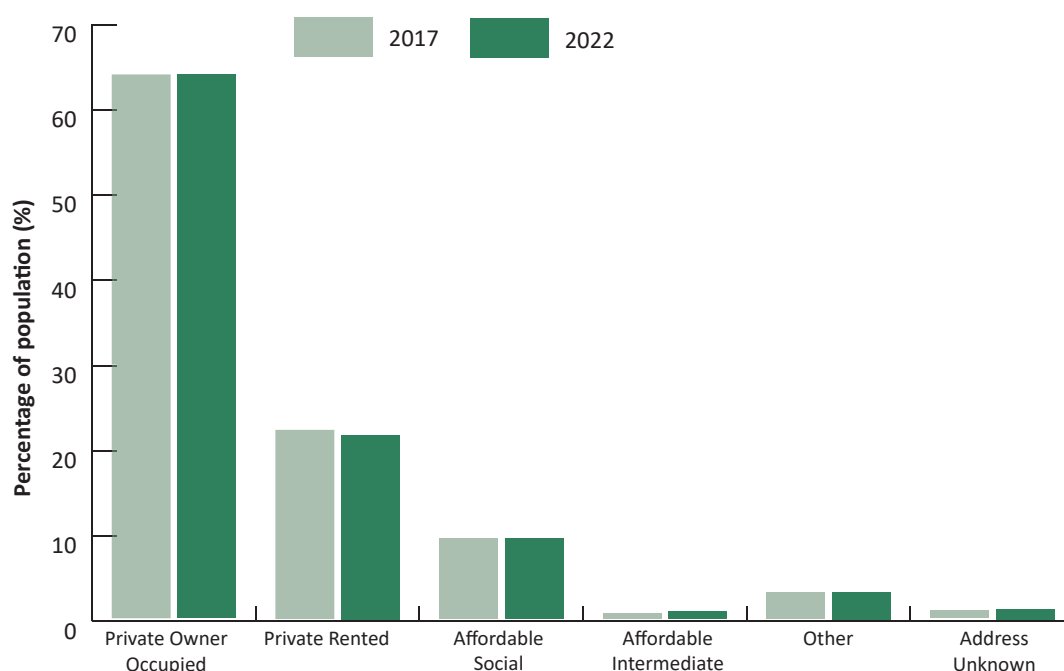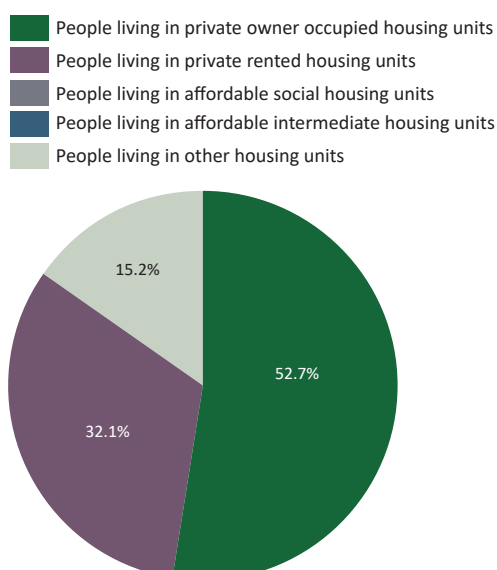
Table 7.3.1: Population by housing tenure (at 31st March 2022)

		% of people in Local Market	% of people in Open Market
Private market	**Owner Occupied**	65.5	52.7
	Rented	21.0	32.1
Affordable market	**Social**	10.3	0.0
	Intermediate	1.0	0.0
	Other	2.3	15.2
	Total	100.0	100.0

Figure 7.3.1: Housing tenure of people living in Local Market (at 31st March 2022)

- People living in private owner occupied housing units
- People living in private rented housing units
- People living in affordable social housing units
- People living in affordable intermediate housing units
- People living in other housing units

Figure 7.3.2: Housing tenure of people living in Open Market (at 31st March 2022)

- People living in private owner occupied housing units
- People living in private rented housing units
- People living in affordable social housing units
- People living in affordable intermediate housing units
- People living in other housing units

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 housing units are in the Local Market, so people living in Open Market units cannot have this tenure type. 11.2% of the people living in Local Market units lived in affordable housing. The information presented here relates to the 98.8% of the population with a known address.

Table 7.3.1 shows that 65.5% of the population living in the Local Market were living in private owner occupied units at the end of March 2022, compared with 52.7% in the Open Market. This formed the highest proportion for both the Local and Open Market. People living in private rental accommodation formed the second highest proportion for both Markets (21.0% in the Local Market and 32.1% in the Open Market).

15.2% of people living in Open Market units had other tenure types, which included people living in Open Market hotels and lodging houses. A lower proportion of those living in Local Market units had other tenure types. This category included the hospital and the prison as well as self-catering units and the majority of staff accommodation.

Table 7.3.2 shows that 0.8% of the population living in the Local Market lived in specialised housing at the end of March 2022. Of those living in Open Market properties, 3.7% lived in specialised housing. Specialised housing includes units which involve some element of care. Residential and nursing homes as well as any extra care accommodation are categorised as specialised.

Table 7.3.2: Population by Specialised housing (at 31st March 2022)

		% of people in Local Market	% of people in Open Market
Specialised	**Private market**	0.5	3.7
	Affordable market	0.3	0.0
Non-specialised	**Private market**	86.0	81.1
	Affordable market	10.9	0.0
	Other	2.3	15.2
	Total	100.0	100.0

At 31st March 2022, 65.4% of the population were in full-time education or in employment, an increase of 1 percentage point since March 2021 and an increase of 0.3 percentage points when compared to March 2020. Measures to help slow the spread of COVID-19 were put in place during 2020 and 2021.

Information on the profile of people in employment and unemployment is available up to the end of September 2022 (see **Sections 9 to 11**).

Categorisation of employees and the self-employed is based on whether they were paid by an employer in the snapshot week or whether they had self-employment earnings. Previously, categorisations had been based on the person's contribution class liability, which resulted in people aged 65 and over being excluded from the figures, since their contribution class is changed to non-employed on or near their 65th birthday, regardless of whether they are employed or self-employed in practice.

People are categorised as being in full-time education if they are at school, university or on other full-time education or training courses. Some of those in full-time education were also employed or self-employed on the snapshot date (but they are still categorised as being in full-time education).

People in employment were either employed by an employer (i.e. received wages for paid work) or were classed as self-employed by Social Security during the snapshot week. If a person was both employed by an employer and self-employed, they are categorised as employed in this report.

### Table 8.1.1 Percentage of population in employment or full-time education

	% of total population in employment or education
Q1 2015	60.9
Q1 2016	62.0
Q1 2017	65.5
Q1 2018	65.5
Q1 2019	65.7
Q1 2020	65.1
Q1 2021	64.4
Q1 2022	65.4

Table 8.1.2 Percentage of population in employment or full-time education by age at 31st March 2022

	Female	Male	Total
14 and under	72.8	73.5	73.2
15 to 19	92.7	92.8	92.7
20 to 24	87.0	87.8	87.4
25 to 29	81.7	87.1	84.5
30 to 34	80.7	88.6	84.7
35 to 39	80.6	87.6	84.2
40 to 44	81.2	87.7	84.5
45 to 49	79.9	89.1	84.4
50 to 54	79.0	87.1	82.9
55 to 59	71.6	83.2	77.3
60 to 64	56.1	72.4	64.0
65 to 69	19.7	24.2	22.0
70 to 74	5.6	7.0	6.3
75 to 79	1.4	1.9	1.7
80 to 84	0.4	0.6	0.5
85 and over	0.0	0.1	0.1
Total	61.6	69.2	65.4

Figure 8.1.1 Population by economic status and age (at 31st March 2022)
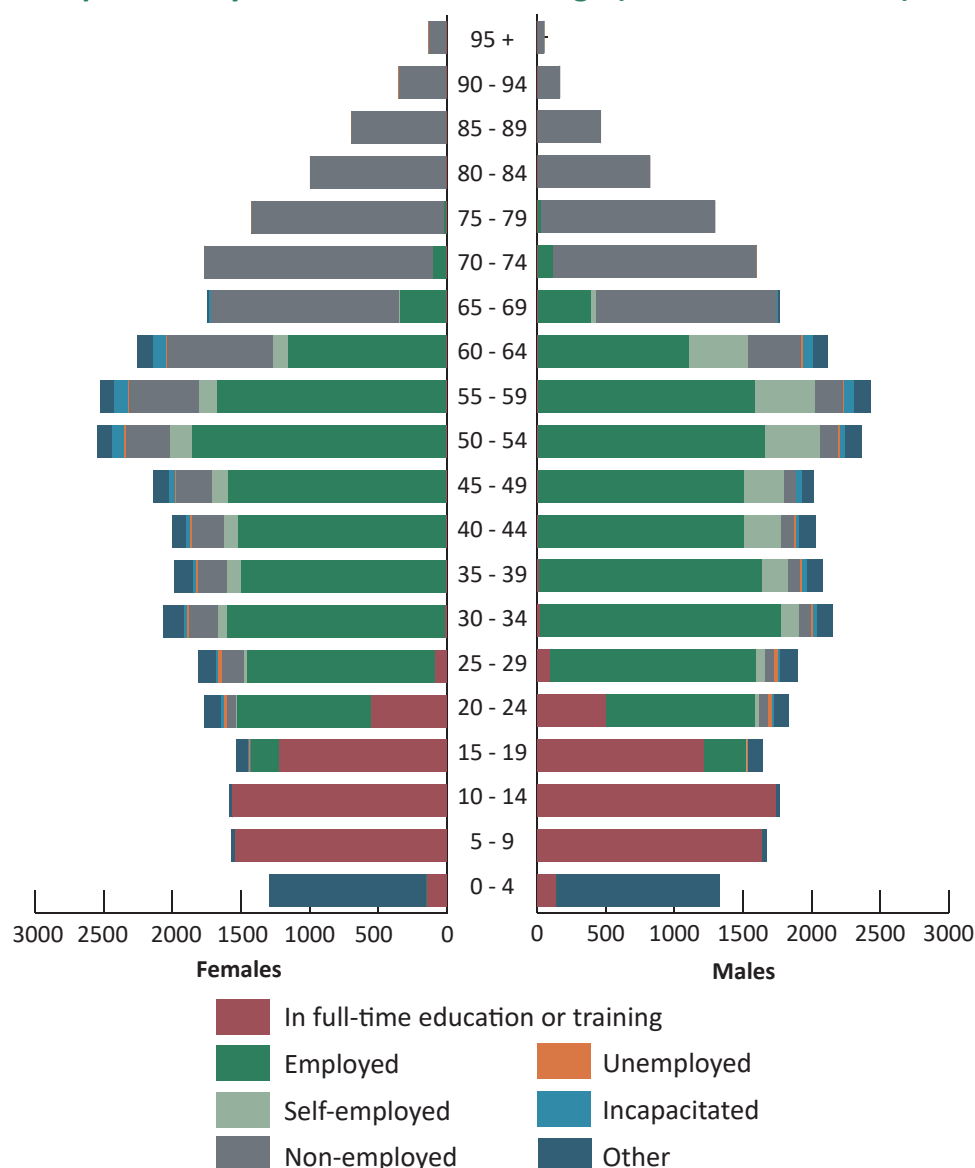
Figure 8.1.1 shows how economic status varies by age group and gender. Overall, 81.9% of the population aged 16 to 64 years old were either in full-time education, employed or self-employed at the end of March 2022. This compares to 80.9% at the same time the previous year and 81.5% in March 2020. Of those aged 65 and over, 7.8% (1,035 people) were employed or self-employed. This compares to 6.6% in March 2021 and 7.0% in March 2020.

People in full-time education or training are concentrated in the 5 to 24 age categories. They are apparent in low numbers up to and including the 65 to 69 age group.

Whilst the number of employed females peaks in the 50 to 54 years age group (1,852 people), the 30 to 34 age group had the largest proportion of employed females (76.8%). For males, the 30 to 34 age group has both the highest proportion of the population (81.8%) and the highest number of people employed (1,764 people).

Self-employment was more apparent in males and non-employment was more apparent in females at the end of March 2022. Unemployment was slightly more apparent in males.

Figure 9.1.1 Annual percentage change in total employment at 30th September 2022
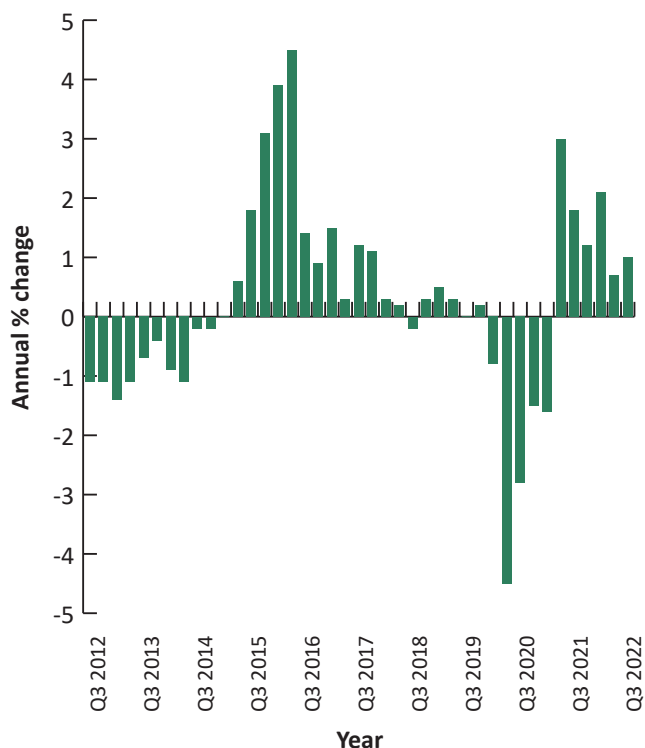
There was an overall increase of 1.0% (see **Figure 9.1.1** and **Table 9.1.1**) in the number of people either employed or self-employed at the end of September 2022 compared to the end of September 2021.

The number of employed people as at 30th September 2022 increased by 1.0% when compared to 30th September 2021 and the number of self-employed people increased by 0.7%.

The Bailiwick of Guernsey has entered two lockdowns in order to help slow the spread of COVID-19. The first lockdown took place between 25th March 2020 and 20th June 2020 and the second took place between 23rd January 2021 and 22nd March 2021. Restrictions on all but essential business activities were imposed and all non-essential shops and community spaces were closed. People were required to stay at home except for limited purposes and all gatherings of more than two people in public were prohibited.

Table 9.1.1 Annual percentage change in total employment, employees and self-employed

	Employed	Self-employed	Total employment
Q3 2018	-0.1	-1.1	-0.2
Q4 2018	0.6	-2.0	0.3
Q1 2019	0.8	-1.8	0.5
Q2 2019	0.5	-1.6	0.3
Q3 2019	0.1	-1.2	0.0
Q4 2019	0.3	-0.5	0.2
Q1 2020	-0.8	-0.2	-0.8
Q2 2020	-4.9	-0.1	-4.5
Q3 2020	-3.2	0.9	-2.8
Q4 2020	-1.8	1.3	-1.5
Q1 2021	-2.0	1.4	-1.6
Q2 2021	3.1	2.0	3.0
Q3 2021	1.8	1.5	1.8
Q4 2021	1.2	1.2	1.2
Q1 2022	2.2	1.5	2.1
Q2 2022	0.7	0.7	0.7
Q3 2022	1.0	0.7	1.0

Figures rounded to one decimal place

Between 19th March 2020 and 30th June 2021, people travelling into the Bailiwick of Guernsey were subject to testing and/or self-isolation requirements unless they had an exemption for medical, compassionate or critical work reasons. Travel restrictions were lifted in stages from 1st July 2021 until 17th February 2022, when the conditions for travelling into the island were returned to how they had been pre-pandemic. As the number of people in the labour market is seasonal and typically increases from March to a peak in August, it is likely that the travel restrictions and self-isolation requirements had a large impact on employment throughout 2020 and 2021, for example seasonal workers to support hostelry and other tourist-based activities.
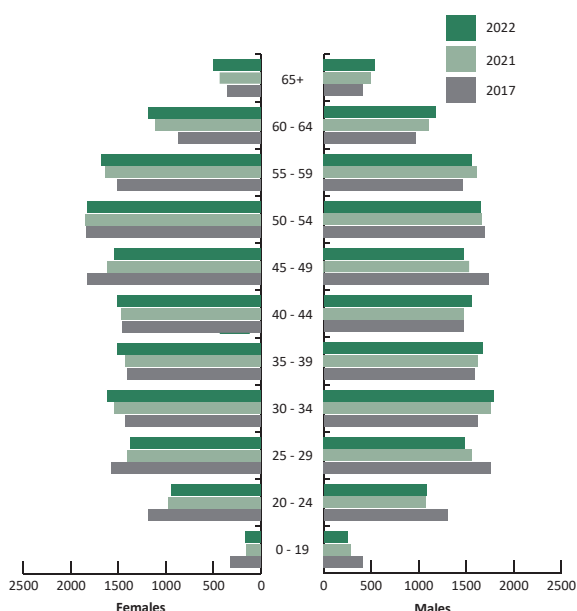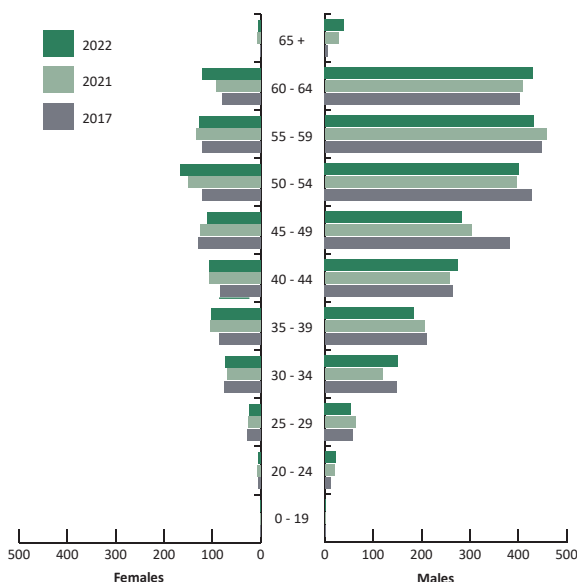
Table 9.2.1 Number in employment at 30th September

	Employed	Self- employed	Total
2017	28,177	3,093	31,270
2018	28,152	3,058	31,210
2019	28,182	3,020	31,202
2020	27,290	3,047	30,337
2021	27,790	3,093	30,883
2022	28,080	3,116	31,196

Figure 9.2.1 Employment by age and gender at 30th September

Figure 9.2.2 Self-employment by age and gender at 30th September

The trend in the number of people in employment is presented in **Table 9.2.1.** It can be seen that the number of people in employment at the end of September 2022 had increased to pre COVID-19 pandemic levels.

The number of employed and self-employed people at the end of September 2022, one year earlier in 2021 and five years earlier in 2017 is broken down by age and gender and shown in **Figures 9.2.1** and **9.2.2**.

Figure 9.2.1 shows that between September 2021 and September 2022 the number of employed women showed the largest increase in the 35 to 39 age group (an increase of 85 people), whereas for males the largest increase was seen in the 40 to 44 age group (an increase of 81 people between September 2021 and September 2022).

When compared to the same time in 2017, the number of employed females aged 45 to 49 decreased by 283 people and the number of employed males of the same age decreased by 261 people. The 20 to 24 and 25 to 29 age groups also saw significant decreases in the number of employed people, for both men and women, between September 2017 and September 2022 (the biggest decrease for males was seen in the 25 to 29 age group with a loss of 270 people). The 60 to 64 age group saw the largest increase in the number of employed males and females between September 2017 and September 2022 (increases of 209 and 314 people respectively, see **Figure 9.2.1**).

As shown in **Figure 9.2.2**, self-employment is more apparent in males than in females. Over the last five years, however, the total number of self-employed males has decreased by 4% (from 2,362 in September 2017 to 2,272 in September 2022), whereas the total number of self-employed women has increased by 15% (from 731 to 844). The number of self-employed males in the 45 to 49 age category showed the largest decline between September 2017 and June 2022 and the 50 to 54 age group showed the largest increase for women.

Table 9.2.2 Employment status by age group at 30th September 2022

	Employed			Self-employed			Total in employment
	Female	Male	Total	Female	Male	Total	
14 and under	0	0	0	0	0	0	0
15 to 19	161	248	409	*	*	3	412
20 to 24	939	1,083	2,022	6	22	28	2,050
25 to 29	1,374	1,488	2,862	23	54	77	2,939
30 to 34	1,619	1,793	3,412	74	151	225	3,637
35 to 39	1,514	1,677	3,191	103	184	287	3,478
40 to 44	1,506	1,554	3,060	106	275	381	3,441
45 to 49	1,545	1,475	3,020	110	282	392	3,412
50 to 54	1,820	1,648	3,468	167	401	568	4,036
55 to 59	1,679	1,561	3,240	128	431	559	3,799
60 to 64	1,182	1,174	2,356	120	430	550	2,906
65 to 69	363	383	746	6	40	46	792
70 to 74	108	110	218	0	0	0	218
75 and over	31	45	76	0	0	0	76
16 to 64	13,339	13,701	27,040	838	2,232	3,070	30,110
65 and over	502	538	1,040	6	40	46	1,086
Total	13,841	14,239	28,080	844	2,272	3,116	31,196

* In instances where there are fewer than five people in any one age category, only the total number of employed or self-employed people is presented.

At 30th September 2022, 31,196 people were either employed or self-employed in Guernsey, of whom 1,086 people (3.5%) were aged over 65 years (see **Table 9.2.2**). This age bracket accounted for 3.7% of employed people and 1.5% of self-employed people. Of the total number of people in employment, 34.4% were aged between 50 and 64.

Of the 27,040 employed people aged 16 to 64 at the end of September 2022, 13,339 (49.3%) were female and 13,701 (50.7%) were male. This compares to 838 self-employed females and 2,232 males, which equates to 27.3% and 72.7% of the 3,070 total.

If a person was both employed by an employer and self-employed, they are categorised as employed in this report.

shows the number of people employed and self-employed by age group at the end of September 2022 compared to the end of September 2021 and September 2017.

Findings from the Community Surveys, undertaken in 2020 and 2021 are available at **www.gov.gg/covid19data** and provide more detailed information on how lockdown impacted on working, incomes and wellbeing.

Section 9.3 provides information on employment and residence status. The principal means of determining an individual's right to live and work in Guernsey is through the administration of the Population Management (Guernsey) Law 2016 which came into force on 3rd April 2017. This superceded the Housing (Control of Occupation) (Guernsey) Law, 1994. However, licences and other documents issued under the Housing Law could continue to be live. Data presented here is based on a mixture of permits, certificates, licences and other documents issued since 1994.

As can be seen in **Figure 9.3.1**, the majority (72%) of those who were employed at the end of September were classified as Permanent Residents* (20,234 people at the end of September 2022).

The number of self-employed Permanent Residents* increased between September 2019 and September 2022 (2,370 to 2,469 people, see **Figure 9.3.2**).

11% of the total number of people employed at the end of September 2022 were employed on the basis of an employment related licence*. The number of people in this category showed an increase between September 2019 and September 2022 (from 2,673 to 3,001 people, see **Figure 9.3.1**). **Figure 9.3.2** shows that the number of self-employed people on an employment related licence* increased (from 85 people at the end of September 2019 to 89 people at the end of September 2022). Those on an employment related licence accounted for just 3% of the total self-employed.
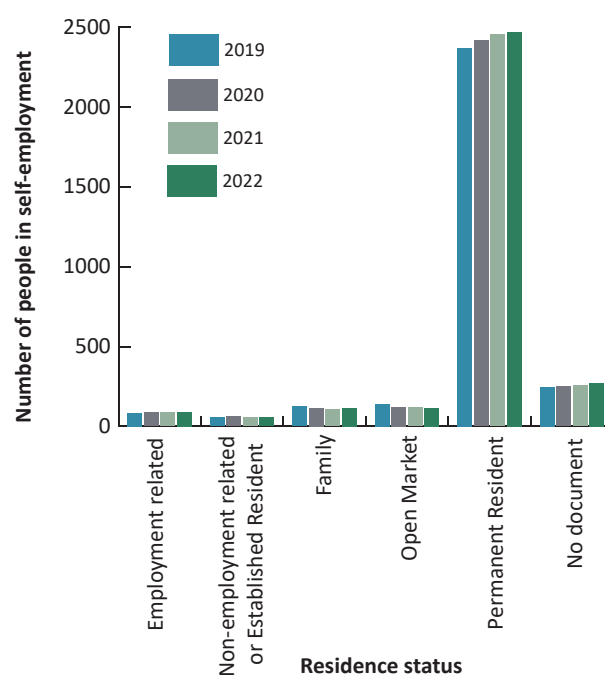
The annual percentage change in the number of people employed or self-employed by residence status can be found on **page 34**.

For more information on residence status, please see **www.gov.gg/populationmanagement**.

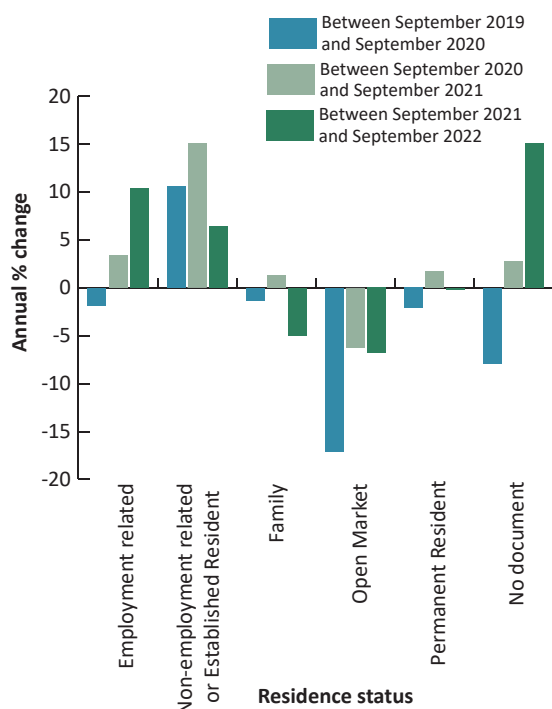**Figure 9.3.1: Employment by residence status (at 30th September)**
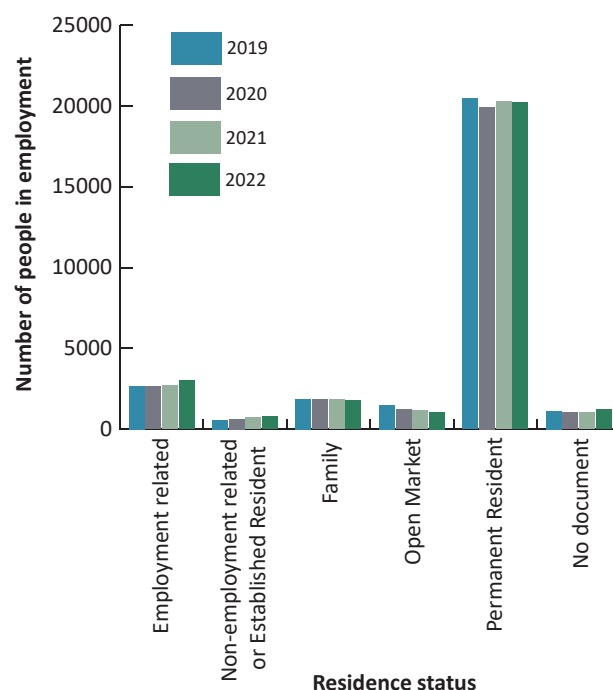
Figure 9.3.2: Self-employment by residence status (at 30th September)

*See **page 34** for definitions of the different types of residence status shown in **Figure 9.3.1** and **9.3.2**

Figure 9.3.3: Annual % change in employment by residence status

* See below for definitions of the residence status categories found in **Figure 9.3.3** and **Figures 9.3.1** and **9.3.2** on **page 33**.

A "Permanent Resident" is defined as a person, meeting certain criteria relating to their period(s) of residence and/or ancestral connections to the island, who has an enduring right to be a Local Market householder (if aged 16+) and to undertake employment in Guernsey.

"Employment related" refers to individuals whose ability to live in the island is based on working for a specific employer in a specific job (includes long-term, medium-term and short-term permits).

"Family" consists of people who live in the Local Market and whose ability to remain in the island is dependent on a family member's residence status.

"Open Market" refers to individuals whose ability to live and work in Guernsey is dependent on living in Open Market accommodation. They are not permitted to occupy a Local Market dwelling.

"Non-employment and Established Resident" refers to those in employment who are permitted to reside and work in Guernsey for reasons not dependent on employment, accommodation or family. This includes Established Residents who have been resident on the island for 8 consecutive years or more but do not yet have Permanent Resident status.

"No document": People may legitimately be in employment and have no document if they have been resident since before 1994 (when the Housing Law was enacted) and have not changed employer since then.

Between September 2021 and September 2022, the largest decrease in the number of people in employment was seen in the Open Market* category (a decrease of 7%, see **Figure 9.3.3**). This compares to a decrease of 6% between September 2020 and September 2021 and 17% between September 2019 and September 2020.

The number of people in employment with no document saw the largest increase between September 2021 and September 2022 (an increase of 15%).

The number of people employed on the basis of an employment related licence (either long-term, medium-term or short-term) saw the second largest increase between September 2021 and September 2022 (an increase of 10%). This compares to an increase of 3% between September 2020 and September 2021 and a 2% decrease between September 2019 and September 2020 (see **Figure 9.3.3**).

The number of people on short-term employment permits increased by 47% between September 2021 and September 2022. The number of people on medium-term employment permits increased by 7% and the number of people on long-term employment permits decreased by 1% during the same time period.

The "Non-employment related or Established Resident"* category increased by 6% between September 2021 and September 2022, compared to increases of 15% and 11% in previous years (see **Figure 9.3.3**). This category includes discretionary permits (i.e a set of permits outlining different scenarios where someone who isn't a Permanent Resident can no longer hold their current Certificate/Permit due to a change in circumstances).

Figure 9.4.1 Employment by economic sector at September 2022
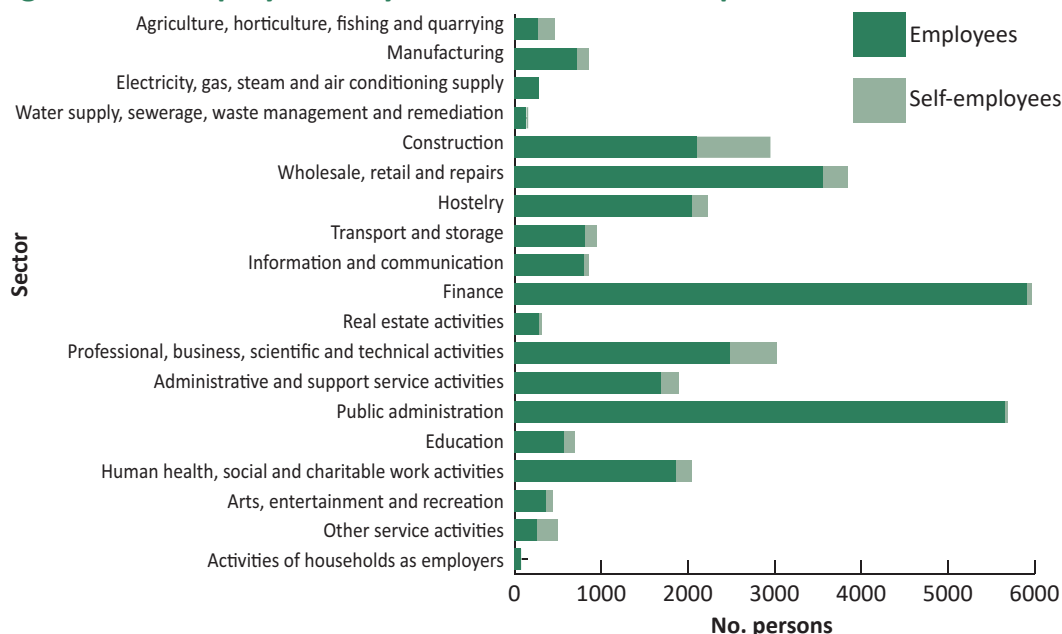
Employers, employees and self-employees can be analysed by economic sector for a more detailed picture of the types of economic activity in which they are involved. A breakdown of the activities included in each of the economic sector codes used in this bulletin can be found on our website, **www.gov.gg/ecodes**.

Please note that the Education and Human health, social and charitable work sectors exclude people employed by the States of Guernsey (e.g. those employed at States-run schools or medical facilities). Those who are employed by the States of Guernsey, including medical and teaching staff, are captured in the Public administration category.

The figures presented in **Figure 9.4.1** and **Table 9.4.1** on **page 36** show all employees and self-employees for each sector. They are sourced from the Rolling Electronic Census and account for all employment, including second, third and fourth jobs that individuals may undertake. Some individuals, in addition to working for an employer, are also self-employed.

As shown in **Figure 9.4.1** and **Table 9.4.1**, the Finance sector was the largest employer in September 2022, accounting for 18.0% of total employment, or 5,971 people, 5,909 of whom were employed and 62 of whom were self-employed. The Construction sector had the largest number of self-employed people in September 2022 (853 people), representing 28.9% of the sector and 25.5% of self-employed people overall.

The annual change in the number of people employed and self-employed within each sector can be found in **Section 9.5**.

The number of positions advertised at the Job Centre and the skills reported by Unemployment Benefit claimants up to the start of October 2022, are presented by sector on **pages 44** and **45**.

Table 9.4.1 Employment by economic sector at September 2022

	Employees			Self-employees			Total no. in employment	% of total for all sectors
	Female	Male	Total	Female	Male	Total		
Agriculture, horticulture, fishing and quarrying	86	183	269	45	155	200	469	1.4
Manufacturing	251	472	723	31	103	134	857	2.6
Electricity, gas, steam and air conditioning supply	59	219	278	-	6	6	284	0.9
Water supply, sewerage, waste management and remediation activities	12	126	138	*	*	20	158	0.5
Construction	136	1,964	2,100	19	834	853	2,953	8.9
Wholesale, retail and repairs	1,618	1,946	3,564	79	204	283	3,847	11.6
Hostelry	853	1,200	2,053	61	115	176	2,229	6.7
Transport and storage	180	633	813	15	114	129	942	2.8
Information and communication	204	597	801	13	39	52	853	2.6
Finance	3,172	2,737	5,909	9	53	62	5,971	18.0
Real estate activities	135	148	283	7	19	26	309	0.9
Professional, business, scientific and technical activities	1,367	1,124	2,491	162	373	535	3,026	9.1
Administrative and support service activities	770	915	1,685	28	186	214	1,899	5.7
Public administration	3,531	2,131	5,662	11	19	30	5,692	17.1
Education	431	141	572	89	33	122	694	2.1
Human health, social and charitable work activities	1,530	333	1,863	91	83	174	2,037	6.1
Arts, entertainment and recreation	186	175	361	37	46	83	444	1.3
Other service activities	210	49	259	184	57	241	500	1.5
Activities of households as employers	53	25	78	*	*	2	80	0.2
Total for all sectors	14,784	15,118	29,902	884	2,458	3,342	33,244	100.0

* In instances where there are fewer than five people in any one category, only the total number of employees or self employees is presented.

Table 9.4.2 Employment within the Finance sector at September 2022

	Total no. in employment	% of total Finance sector
Banking	1,431	24.0
Fiduciary	1,568	26.3
Funds	1,613	27.0
Insurance	729	12.2
Other	630	10.6
Total	5,971	100.0

Of the 5,971 people employed within the Finance sector, 1,613 people (27.0%) worked in sub-sectors relating to Funds, 1,568 people (26.3%) were involved in Fiduciary activities and 1,431 (24.0%) worked in Banking at the end of September 2022.

The annual change in the number of people employed and self-employed within each sector can be found in **Section 9.5**.

Table 9.5.1 Annual percentage change in total employment by sector

	Annual % change							
	2020 Q4	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3
Agriculture, horticulture, fishing and quarrying	13.4	3.2	0.9	-0.7	1.1	2.4	1.5	3.1
Manufacturing	-0.2	1.8	1.4	2.0	1.8	0.3	-3.0	27.5
Electricity, gas, steam and air conditioning supply	-3.5	-5.9	-3.2	1.1	-2.6	-1.9	1.5	3.3
Water supply, sewerage, waste management and remediation activities	-6.0	-4.7	0.0	25.0	17.6	17.9	24.6	5.3
Construction	2.4	3.2	5.1	3.1	1.4	1.7	1.0	0.5
Wholesale, retail and repairs	-3.7	-1.9	2.3	1.4	-0.2	1.6	-0.3	-0.4
Hostelry	-11.1	-9.8	12.4	4.4	7.5	12.5	13.2	16.4
Transport and storage	-3.1	-10.5	0.0	-1.0	-2.5	8.3	3.6	-14.8
Information and communication	0.5	-2.7	-0.9	-1.2	-1.9	-1.4	-2.6	-0.6
Finance	-1.8	-1.0	-0.2	-0.4	-0.5	-0.2	-1.4	-0.4
Real estate activities	2.4	-1.0	1.4	2.3	3.3	3.8	6.1	-0.3
Professional, business, scientific and technical activities	-1.6	-2.0	2.8	5.8	4.9	5.1	1.3	1.0
Administrative and support service activities	-7.0	-6.2	7.9	4.9	2.5	3.8	12.2	10.6
Public administration	0.6	1.8	6.3	2.7	0.6	-0.2	-3.1	2.1
Education	2.5	2.5	6.9	3.1	3.8	3.7	4.2	5.0
Human health, social and charitable work activities	2.7	1.4	8.1	5.0	3.8	4.0	-4.9	-6.9
Arts, entertainment and recreation	8.0	7.7	16.5	6.4	-2.0	3.7	5.8	6.2
Other service activities	0.4	0.8	8.8	7.5	8.8	5.4	-1.8	-3.5
Activities of households as employers	0.0	0.0	1.3	-6.3	-6.0	-3.8	-2.6	8.1

Table 9.5.1 shows that the Manufacturing sector showed the largest annual increase in the number of employment roles between 30th September 2021 and 30th September 2022, at 27.5%, the largest annual increase for this sector since recent records began in 2009. The Transport and storage sector showed the largest annual decrease (14.8%). This was the largest annual decrease for this sector since recent records began in 2009.

Please note that some sectors have a small number of people in employment (see **Table 9.4.1** on **page 36**). Care must be taken when interpreting the annual percentage change for the Activities of households as employers sector. It includes the activities of households as employers of domestic personnel such as cooks, gardeners, housekeepers, babysitters and private tutors, for example. The annual percentage changes in the number of employment roles for all the other sectors are presented graphically on **page 38**.

The number of positions advertised at the Job Centre and the skills reported by Unemployment Benefit claimants up to the start of October 2022, are presented by sector on **pages 44** and **45**.

Findings from the Community Surveys, undertaken in 2020 and 2021 are available at **www.gov.gg/covid19data** and provide more detailed information on how lockdown impacted on working, incomes and wellbeing.

Figure 9.5.1 Percentage change in total employment by sector
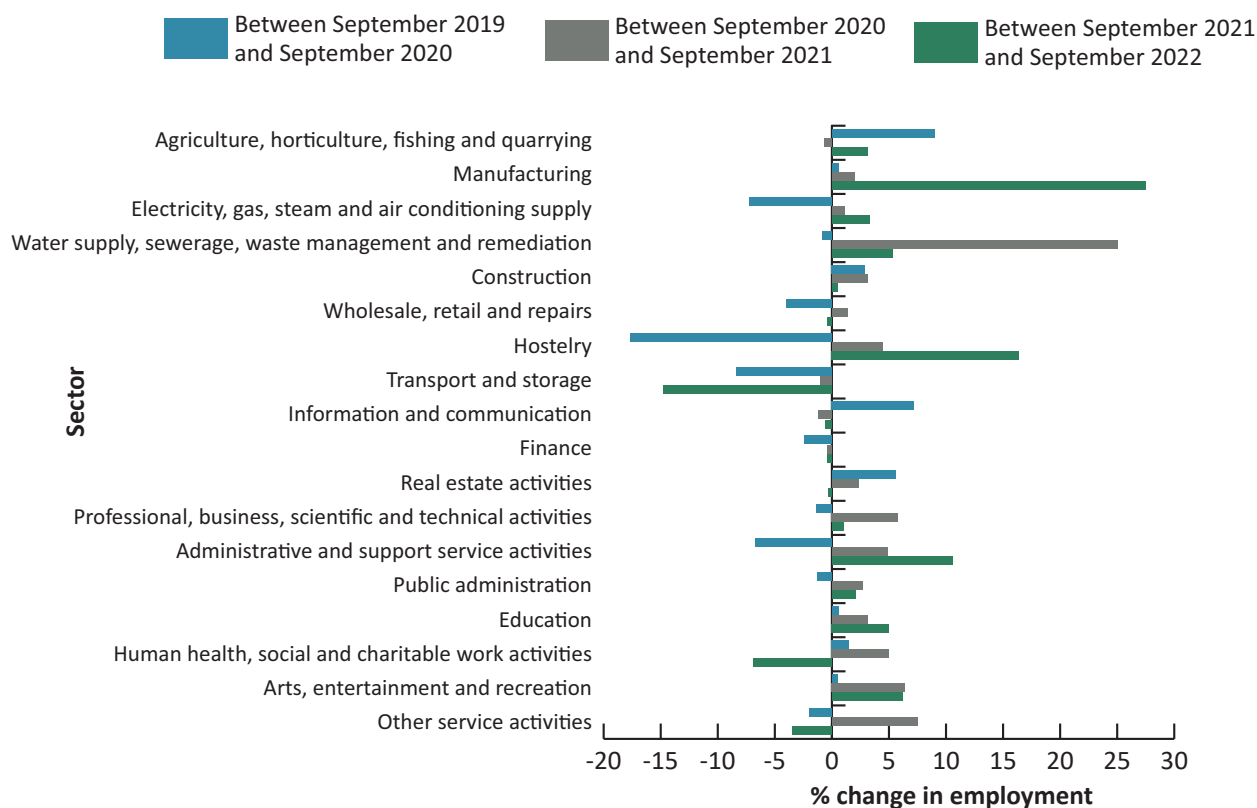
Eleven of the eighteen economic sectors displayed in **Figure 9.5.1** showed an increase in employment roles between 30th September 2021 and 30th September 2022. This compares to fourteen between 30th September 2020 and 30th September 2021 and eight between 30th September 2019 and 30th September 2020.

Between September 2021 and September 2022, the following sectors decreased in terms of numbers of employment roles: Wholesale, retail and repairs, Transport and storage, Information and communication, Finance, Real estate activities, Human health, social and charitable work activities and Other service activities. All other sectors increased numbers of roles between September 2021 and September 2022 (to higher than September 2019 levels, with the exception of the Electricity, gas, steam and air conditioning supply sector).

Between September 2021 and September 2022, Human health, social and charitable work activities saw the largest annual decrease for that sector since recent records began in 2009 (a decrease of 6.9%). Hostelry saw the largest annual increase for that sector since recent records began, at 16.4%

Please note that some sectors have a small number of people in employment (see **Table 9.4.1** on **page 36**).

Findings from the Community Surveys, undertaken in 2020 and 2021 are available at **www.gov.gg/covid19data** and provide more detailed information on how lockdown impacted on working, incomes and wellbeing.

Figure 10.1.1 Annual percentage change in total number of employers
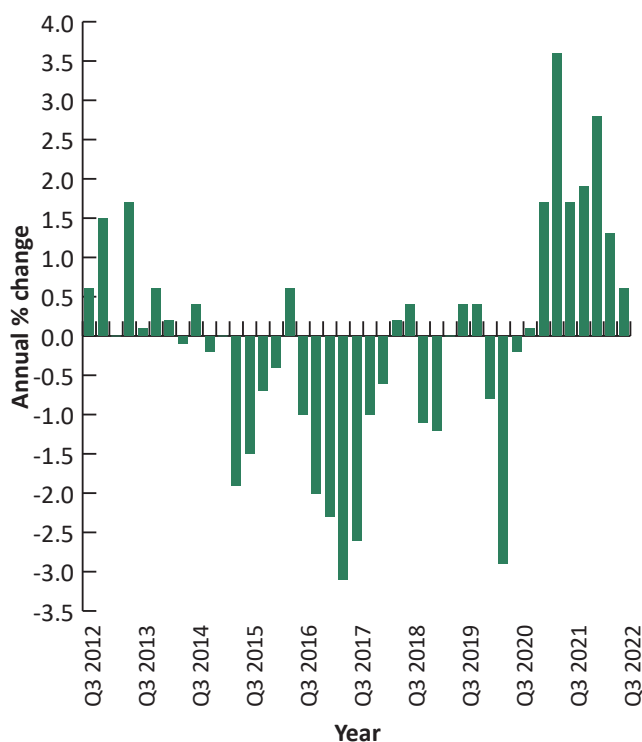
The figures presented in **Figure 10.1.1** and **Table 10.1.1** are calculated using Electronic Census data, where Social Security data had been used prior to 2015.

There were 2,225 employers at the end of September 2022 (see **Table 10.2.1** on **page 40**). This was an annual increase of 0.6%, as shown in **Figure 10.1.1**.

Table 10.1.1 Annual percentage change in total number of employers

	Annual % change
Q3 2018	0.4
Q4 2018	-1.1
Q1 2019	-1.2
Q2 2019	0.0
Q3 2019	0.4
Q4 2019	0.4
Q1 2020	-0.8
Q2 2020	-2.9
Q3 2020	-0.2
Q4 2020	0.1
Q1 2021	1.7
Q2 2021	3.6
Q3 2021	1.7
Q4 2021	1.9
Q1 2022	2.8
Q2 2022	1.3
Q3 2022	0.6

Table 10.2.1 Employers by economic sector and size at September 2022

	No. employers by size (number of employees)								
	1	2 to 5	6 to 10	11 to 25	26 to 50	51 to 100	101 to 250	Over 250	Total
Agriculture, horticulture, fishing and quarrying	17	29	9	0	1	1	0	0	57
Manufacturing	13	23	14	8	1	2	1	0	62
Electricity, gas, steam and air conditioning supply	3	2	2	0	1	0	1	0	9
Water supply, sewerage, waste management and remediation activities	6	4	1	1	0	0	1	0	13
Construction	101	129	68	27	7	4	1	0	337
Wholesale, retail and repairs	64	139	55	32	20	7	5	1	323
Hostelry	28	61	44	34	5	6	3	0	181
Transport and storage	16	27	7	8	3	1	1	1	64
Information and communication	35	23	11	6	7	2	1	0	85
Finance	82	94	36	53	36	21	8	1	331
Real estate activities	16	20	4	6	3	0	0	0	49
Professional, business, scientific and technical activities	61	56	27	25	4	7	4	1	185
Administrative and support service activities	39	51	21	15	13	3	3	0	145
Public administration	4	8	2	1	0	0	1	1	17
Education	6	3	6	6	0	3	2	0	26
Human health, social and charitable work activities	40	52	31	16	13	8	2	0	162
Arts, entertainment and recreation	17	29	5	7	3	0	0	0	61
Other service activities	44	39	5	1	1	0	0	0	90
Activities of households as employers	17	6	3	2	0	0	0	0	28
Total	609	795	351	248	118	65	34	5	2,225

Table 10.2.1 and Figure 10.2.1 on page 41 show the number of employers broken down by economic sector and by the number of employees as at 30th September 2022. They are sourced from the Rolling Electronic Census.

It can be seen that the Construction sector had the highest number of employing organisations (337). The Finance sector had 331 employing organisations at the end of September 2022 and had the highest number of employing organisations with more than 50 employees (30 employers).

The Construction sector had the highest number of employers with fewer than six employees (230).

There were five organisations employing more than 250 people at the end of September 2022.

Figure 10.2.1 Employers by economic sector at September 2022
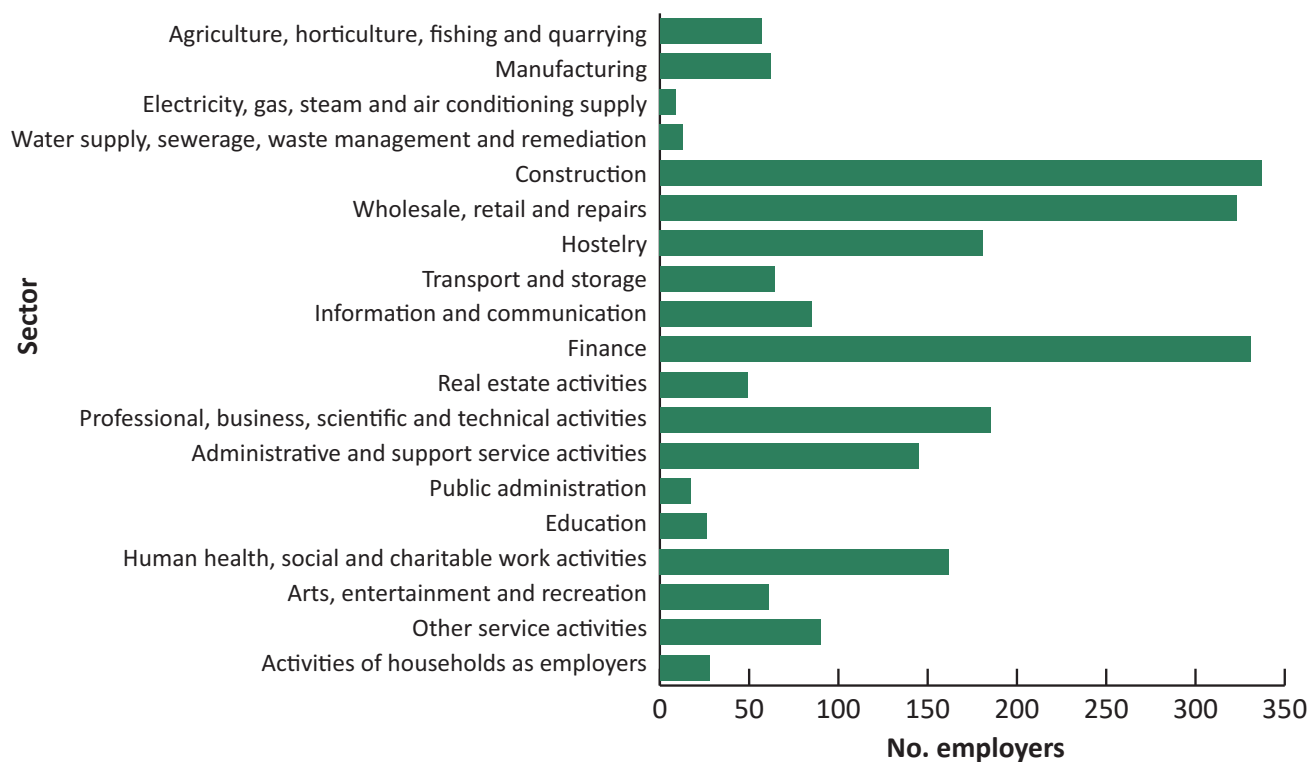
As shown above in **Figure 10.2.1**, the Construction, Wholesale, retail and repairs and Finance sectors had the largest numbers of employers. Employers in the Wholesale, retail and repairs and Construction sectors tended to employ fewer people than those in the Finance sector (see **Table 10.2.1** on **page 40**).

Section 11 provides information on unemployment using data sourced from the Committee for Employment & Social Security. Ordinarily, unemployment benefit figures as at the end of December would be included as part of this annual report, however the full data extract was not available at the time of publishing. This means that unemployment benefit figures represent the period up to 1st October 2022.

The total number of people registered as unemployed has been available since 1966*. This was the headline measure for unemployment until 2007 when a new measure, aligning with the definition used by the International Labour Organisation (ILO), was introduced. This figure, of "wholly unemployed", includes only those that were registered as unemployed and did not do any work in the snapshot week and anyone who has either found work/ returned to work, but yet to receive a wage. It should be noted that the ILO measure is based on survey data (i.e. a sample of the population, who are asked to self-classify their employment status), whereas the information in this bulletin is based on administrative data relating to Unemployment Benefit and Income Support claimants across the whole population.

As shown in **Table 11.1.1**, there were 242 people registered as "wholly unemployed" at the end of September 2022, 142 fewer than at the end of September 2021 and 328 fewer than at the same time in 2020. 0.8% of the workforce were registered as wholly unemployed at the end of September 2022, the lowest proportion seen since 2008. This compares to 1.3% at the end of September 2021 and 1.9% at the end of September 2020. The number of "total registered unemployed"* accounted for 1.9% of the workforce at the end of September 2022, 0.8 percentage points lower than at the same time the previous year and the lowest proportion in September since 2017.

The number of people unemployed broken down by age and gender is shown in **Figure 11.1.1**.

Table 11.1.1 Percentage of workforce registered as unemployed during the last week of September

|	Wholly unem- ployed	% of work- force	Total registered unem- ployed*	% of work- force
30/09/2012	349	1.2	526	1.8
30/09/2013	375	1.3	581	2.0
30/09/2014	348	1.2	600	2.1
30/09/2015	386	1.3	635	2.1
30/09/2016	367	1.2	637	2.1
30/09/2017	276	0.9	552	1.8
30/09/2018	274	0.9	714	2.3
30/09/2019	321	1.0	769	2.5
30/09/2020	570	1.9	990	3.3
30/09/2021	384	1.3	771	2.6
30/09/2022	242	0.8	580	1.9

Figure 11.1.1 Unemployment by age and gender during the last week of September
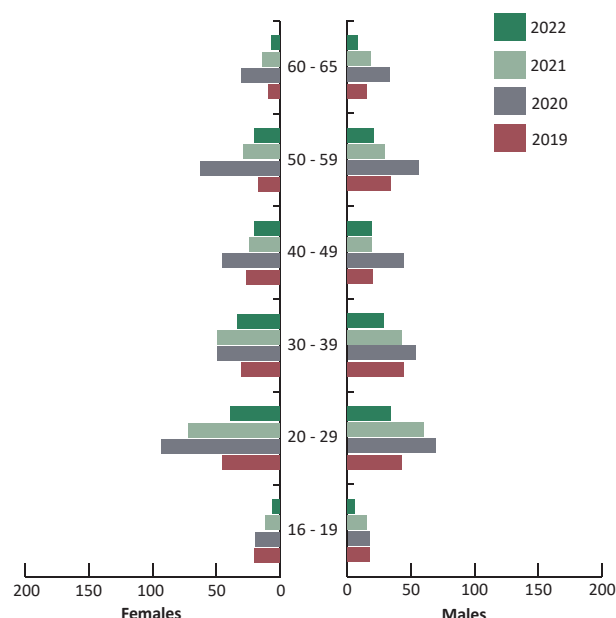
*The definition of what comprises "total registered unemployed" has gradually expanded over time to include those on government training schemes for the unemployed, anybody in part-time or casual employment who is available to work additional hours and still eligible to claim job seekers' benefit to supplement their income, and those who are fully employed and eligible for Income Support (previously Supplementary Benefit) on top of their low earnings. Additionally, the introduction of the Income Support scheme in 2018 included a work requirement for all claimants of working age.

Figure 11.1.2 Number of people registered as unemployed
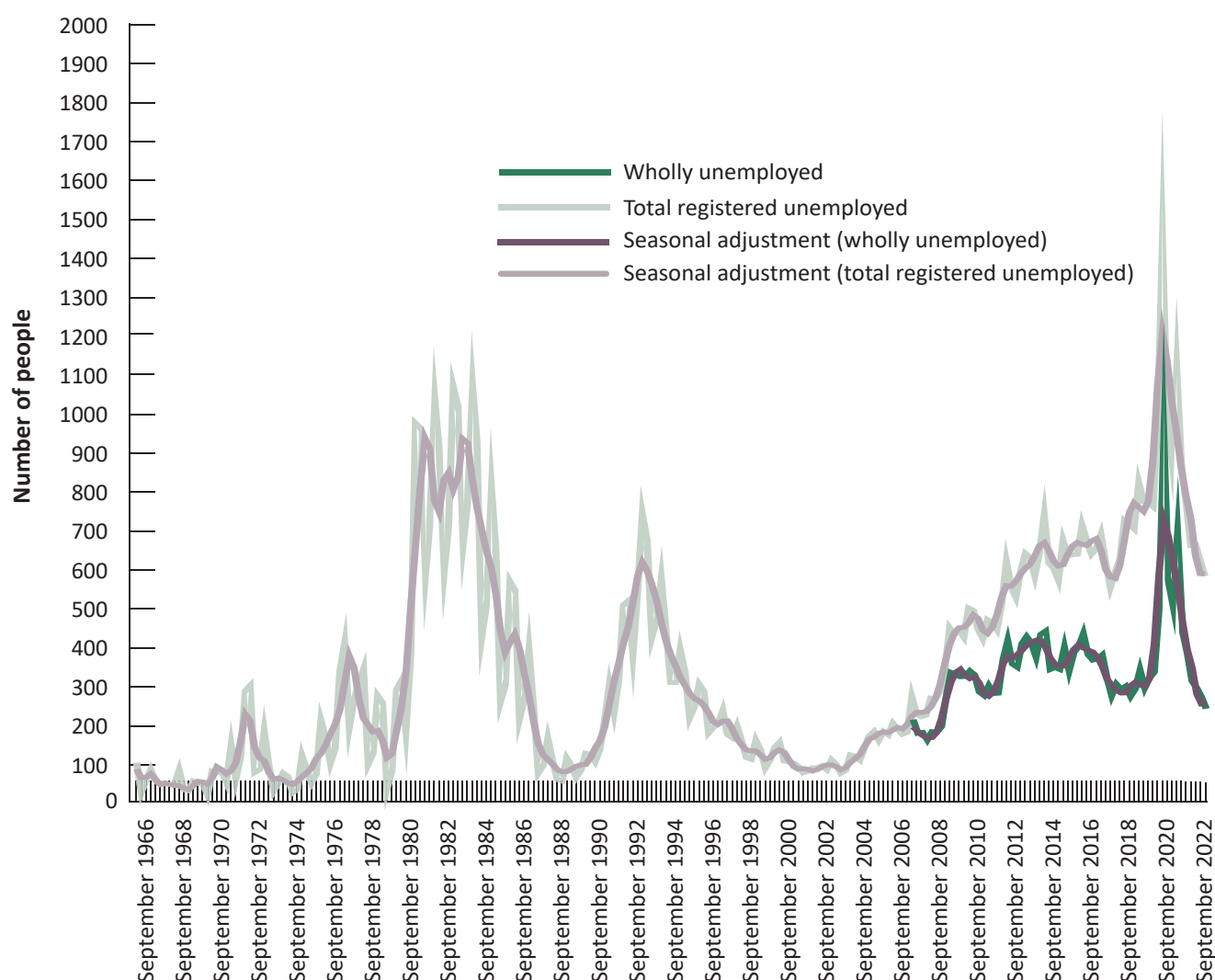
Unemployment as at the end of each quarter is displayed in **Figure 11.1.2.** The number of people unemployed peaked during Q2 2020, during the first lockdown. The first lockdown took place between 25th March 2020 and 20th June 2020 and the second took place between 23rd January 2021 and 22nd March 2021.

Data on the "total registered unemployed"* has been available since 1966. As shown in **Table 11.1.1** on **page 42**, there was a total of 580 people registered as unemployed* at the end of September 2022, the lowest September figure since 2017. This figure is 65% lower than the peak in total registered unemployed*, recorded in June 2020, 21% lower than the peak in unemployment seen at the end of December 1992 and 48% lower than the peak seen at the end of December 1983, during recessions in the early 1980s and 1990s.

The trend in unemployment when adjusted to account for seasonal variation is also shown in **Figure 11.1.2**.

*The definition of what comprises "total registered unemployed" has gradually expanded over time to include those on government training schemes for the unemployed, anybody in part-time or casual employment who is available to work additional hours and still eligible to claim job seekers' benefit to supplement their income, and those who are fully employed and eligible for Income Support (previously Supplementary Benefit) on top of their low earnings. Additionally, the introduction of the Income Support scheme in 2018 included a work requirement for all claimants of working age. These factors may partly account for the increasing trend in unemployment seen in **Figure 11.1.2.**

## 11.2 Job vacancies - monthly snapshots

Figure 11.2.1 shows the number of positions advertised with the Job Centre by sector at the end of each month between January 2018 and September 2022. It can be seen that there was a sharp decrease in the number of positions advertised across all sectors in March and April 2020 and January and February 2021, during the Bailiwick's two lockdowns.

As shown in **Figure 11.2.1**, there was a large increase in the number of positions advertised between February 2021 and March 2021, when the Bailiwick came out of its second lockdown. Increases were seen across all sectors but the Catering and Hospitality sector saw the largest increase (an increase of 221 positions).

The total number of positions advertised with the Job Centre peaked in May 2022 (650 positions), falling to 299 positions in September 2022. This compares to 441 positions in September 2021 and 240 in September 2020. 65 of the 299 positions in September 2022 were in Retail and 57 were in Catering and Hospitality.

The "other" category includes roles within driving/ delivery, engineering, mechanical, IT and beauty therapy.

Figure 11.2.1 Number of positions advertised with the Job Centre at the end of each month by sector
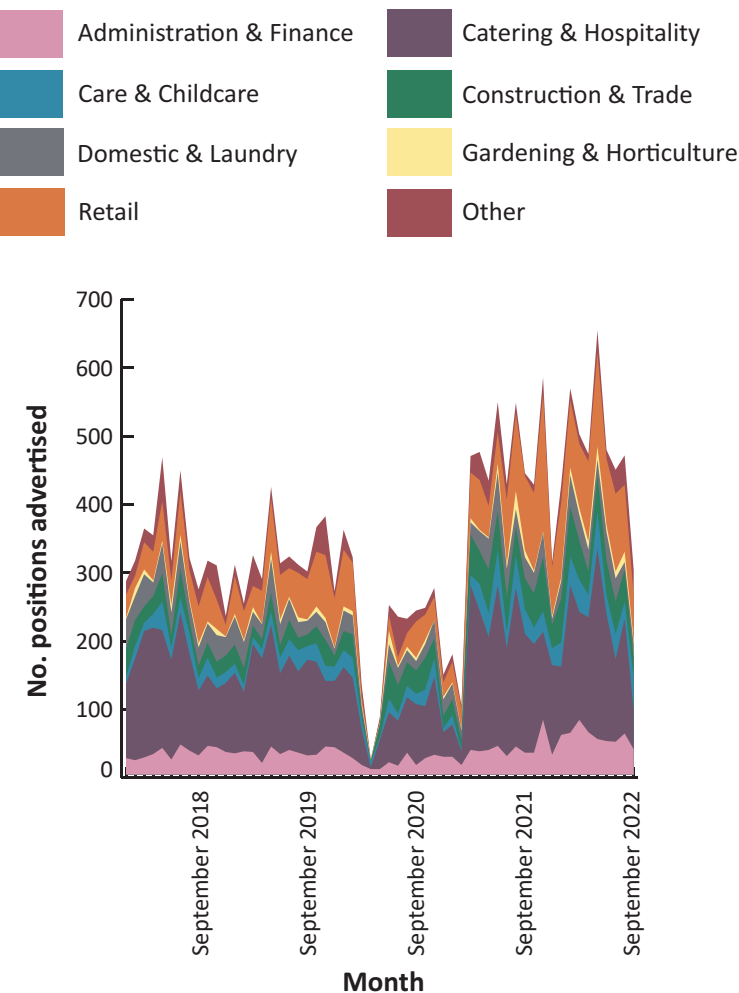
11.3 Job Centre function

The Job Centre offers support for working age people; to help them improve their chances of starting work or increasing their hours of work. Job Centre clients are either supported by an Employment Advisor, Work Rehabilitation Officer or Case Worker (if with other agencies). Job Centre Advisors assist people in returning to mainstream employment by helping them prepare CVs, cover letters and to develop an action plan. Support is also available to people who have been away from the work place for some time.

The Job Centre continually seeks new training and work rehabilitation initiatives in order to meet the ever increasingly diverse requirements of both the job market and its customers. There are many schemes available to help individuals develop their skills and experience to help them find work. These include placement opportunities such as the Kickstart and Work2Benefit schemes and a range of free training courses designed to teach skills that are valuable to local employers. The Job Centre also offers a free vacancy and job matching service to local employers and hosts regular Job Fairs to give job seekers and employers the opportunity to connect.

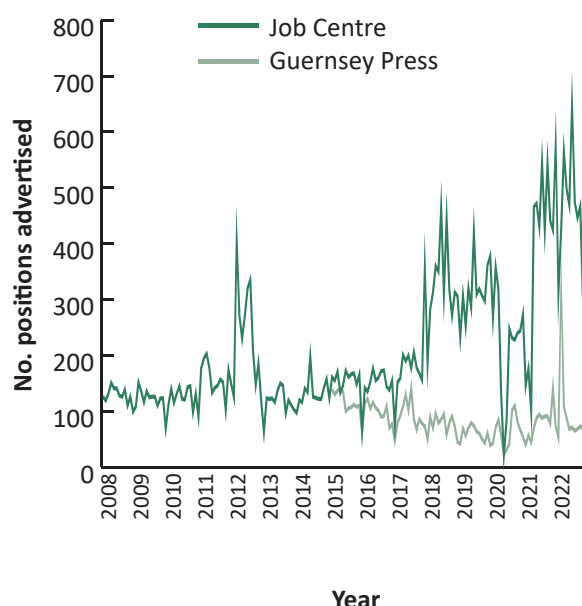## Figure 11.4.1 Number of positions advertised with the Job Centre and in the Guernsey Press each month

Figure 11.4.1 shows the number of positions advertised with the Guernsey Job Centre and, from September 2015, the Guernsey Press each month. Although this is not a complete representation of the total number of vacancies in the island, it does provide an indication of the strength of the employment market.

There were 299 positions advertised with the Job Centre during September 2022. This compares to 441 positions during September 2021 and 240 during September 2020. The number of vacancies advertised in the Guernsey Press (paper only, excluding online advertising) during September 2022 totalled 68. This was 10 fewer than September 2021 and 13 fewer than September 2020.

There were 446, 467 and 299 positions advertised at the Job Centre in July, August and September 2022 respectively.

Figure 11.4.2 Type of positions advertised with the Job Centre during September
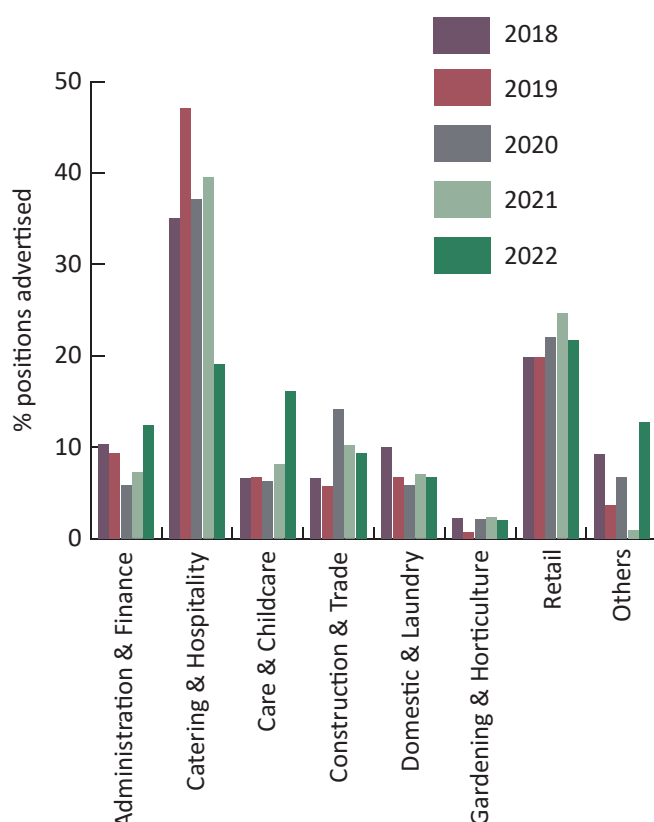

Figure 11.4.2 shows the type of positions advertised with the Job Centre during September between 2018 and 2022. Of the positions advertised in September 2022, 22% were in Retail, 19% were in Catering and Hospitality (the lowest proportion in September for that sector in more than four years) and 16% were in Care and Childcare (the highest proportion in September for that sector in more than four years). The "other" category includes roles within driving/delivery, engineering, mechanical, IT and beauty therapy.

See **page 44** for more information on the function of the Job Centre.

As at the start of October 2022, 29% of the skills reported by people claiming Unemployment Benefit related to Administration and Finance, 15% in Retail, 14% in Construction and Trade and 13% were skills in Catering and Hospitality.

Table 12.1.1 Nominal median earnings (all employees)

Date	Four quarter average earnings (£)	Annual % change
Q3 2020	34,752	2.5
Q4 2020	35,006	2.5
Q1 2021	35,497	3.2
Q2 2021	36,018	4.5
Q3 2021	36,326	4.5
Q4 2021	36,732	4.9
Q1 2022	36,982	4.2
Q2 2022	37,387	3.8
Q3 2022	38,252	5.3

Table 12.1.2 Nominal lower quartile earnings (all employees)

Date	Four quarter average earnings (£)	Annual % change
Q3 2020	24,171	2.7
Q4 2020	24,337	2.5
Q1 2021	24,587	2.9
Q2 2021	24,963	4.2
Q3 2021	25,226	4.4
Q4 2021	25,505	4.8
Q1 2022	25,757	4.8
Q2 2022	26,132	4.7
Q3 2022	26,541	5.2

Table 12.1.3 Nominal upper quartile earnings (all employees)

Date	Four quarter average earnings (£)	Annual % change
Q3 2020	51,022	2.4
Q4 2020	51,378	2.3
Q1 2021	52,331	3.5
Q2 2021	53,001	4.8
Q3 2021	53,299	4.5
Q4 2021	53,692	4.5
Q1 2022	53,787	2.8
Q2 2022	54,377	2.6
Q3 2022	55,974	5.0

Earnings data is recorded by Social Security each quarter and is used to calculate median earnings of employees. The median is the middle value when data are sorted into numerical order. It is a measure of earnings from all employment, unadjusted for the number of hours worked i.e. the level can be impacted by changes in the number of hours worked and rates of pay. The measure does not include earnings which employees may also gain from self-employment or income from any other sources.

The figures reflect Guernsey only and exclude Alderney, based on data collected from the Rolling Electronic Census IT system. The figure for each quarter represents the average over the four preceding quarters.

Nominal median earnings increased by 5.3% between the year ending September 2021 and the year ending September 2022, from £36,326 to £38,252 (see **Table 12.1.1**).

The lower and upper quartile earnings for the quarter ending 30th September 2022 and the previous eight quarters are presented in **Tables 12.1.2** and **12.1.3**. Using four quarter averages, lower quartile earnings increased by 5.2% between the years ending 30th September 2021 and 30th September 2022, whilst upper quartile earnings increased by 5.0%.

On 24th March 2020, a Payroll Co-Funding Scheme was introduced in Guernsey to provide financial support to businesses and self-employed workers affected by the COVID-19 pandemic. The first payments were made at the start of April 2020 and the sectors and businesses most impacted by COVID-19 were supported in this way throughout 2020 and 2021. Employers could claim for payroll co-funding after paying their employees, so any co-funded element is included within the figures presented in this section of the report. More information on payroll co-funding can be found on **page 53**.

Real earnings, which show trends after the effects of inflation have been removed, are shown on **page 48**. Information on income and expenditure by household groups is available from **www.gov.gg/household**.

Figure 12.1.1 Nominal median earnings by distribution at 30th September
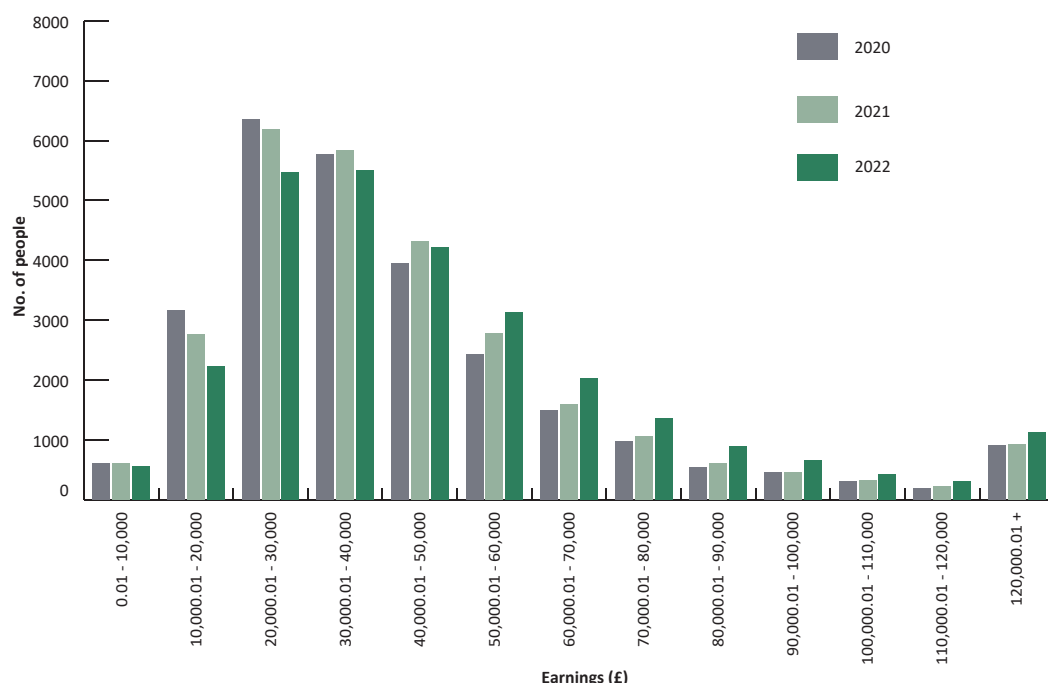
Figure 12.1.1 shows the number of employees in each earnings band at the end of September 2022 compared to the end of September 2021 and September 2020. It should be noted that the figures in **Figure 12.1.1** are September snapshots, rather than four quarter averages, unlike other earnings information presented in this report.

The distributions of earnings at the end of September 2020 and 2021 show a peak in the £20,000.01 to £30,000 category. At the end of September 2022, the earnings band with the highest number of people (5,499) was the £30,000.01 to £40,000 band. There were 885 fewer people within the £20,000.01 to £30,000 earnings band at the end of September 2022 when compared to the end of September 2020. The number of people in the £10,000.01 to £20,000 earnings band also showed a significant decrease between September 2020 and September 2022 (a decrease of 946 people). Conversely, the number of people in every earnings band above £40,000 increased between September 2020 and September 2022.

The total number of people included in the analysis for **Figure 12.1.1** increased by 1.1% between September 2021 and September 2022 and increased by 2.9% between September 2020 and September 2022.

Figure 12.1.1 shows a combination of people moving from lower earnings bands up to higher earnings bands and people leaving lower paid roles in 2020 and 2021 and not returning to them nor moving up to higher paid roles (particularly those aged 60 or more). Information on remuneration is included in this bulletin to help give a fuller picture of employment earnings trends (see **Section 13**).

As explained on **page 46**, earnings data is a measure of earnings from all employment and is unadjusted for the number of hours worked i.e. the level can be impacted both by changes in the number of hours worked and rates of pay.

Findings from the Community Surveys, undertaken in 2020 and 2021 are available at **www.gov.gg/covid19data** and provide more detailed information on how lockdown impacted on working, incomes and wellbeing.

12.2 Earnings (real)

Real earnings are presented to show trends after the effects of inflation have been removed. All real figures shown in this report have been adjusted to September 2022 prices.

The figures presented in **Section 12.2** have been restated since the last publication due to a change in methodology. The change has been made to ensure the conversion from nominal to real figures is done consistently across different statistics (and compared with other jurisdictions). This change brings these figures in line with the remuneration statistics published in **Section 13** of this report and other statistics published by the Data & Analysis Service.

Median annual earnings, in real terms, decreased by 0.9% over the year ending 30th September 2022 (see **Table 12.2.1**).

Lower quartile earnings decreased by 0.9% in real terms between the years ending 30th September 2021 and 30th September 2022. Upper quartile earnings saw an decrease in real terms of 1.1% over the same period (see **Tables 12.2.2** and **12.2.3** respectively).

Table 12.2.1 Real median earnings (all employees)

Date	Four quarter average earnings (£)	Annual % change
Q3 2020	38,815	0.6
Q4 2020	38,999	0.9
Q1 2021	39,391	1.7
Q2 2021	39,750	2.9
Q3 2021	39,778	2.5
Q4 2021	39,804	2.1
Q1 2022	39,522	0.3
Q2 2022	39,300	-1.1
Q3 2022	39,439	-0.9

Table 12.2.2 Real lower quartile earnings (all employees)

Date	Four quarter average earnings (£)	Annual % change
Q3 2020	26,997	0.8
Q4 2020	27,113	0.9
Q1 2021	27,287	1.4
Q2 2021	27,551	2.6
Q3 2021	27,622	2.3
Q4 2021	27,634	1.9
Q1 2022	27,530	0.9
Q2 2022	27,470	-0.3
Q3 2022	27,366	-0.9

Table 12.2.3 Real upper quartile earnings (all employees)

Date	Four quarter average earnings (£)	Annual % change
Q3 2020	56,988	0.5
Q4 2020	57,239	0.7
Q1 2021	58,068	2.0
Q2 2021	58,494	3.2
Q3 2021	58,371	2.4
Q4 2021	58,193	1.7
Q1 2022	57,473	-1.0
Q2 2022	57,155	-2.3
Q3 2022	57,703	-1.1

Table 12.3.1 Nominal median earnings by gender

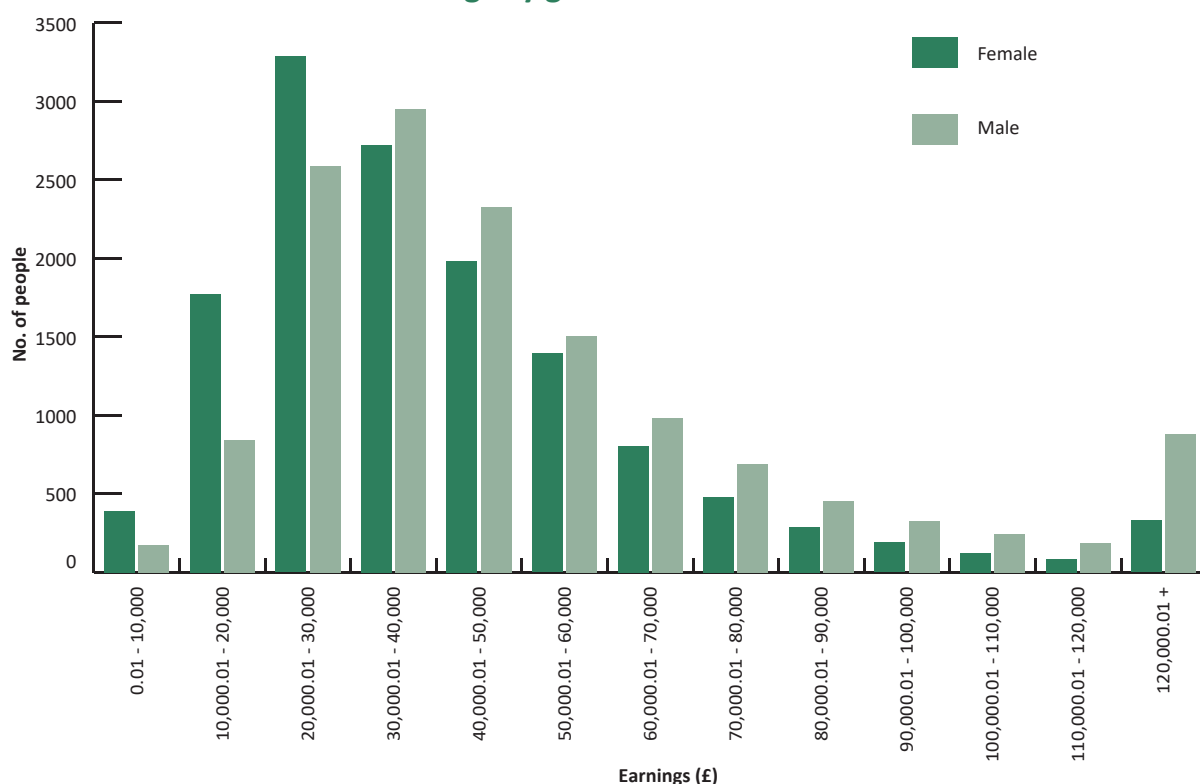| Date	Four quarter average earnings (£)		Annual % change	
	Female	Male	Female	Male
Q3 2020	31,583	37,789	3.3	1.8
Q4 2020	31,857	37,996	3.6	1.7
Q1 2021	32,474	38,348	4.6	2.0
Q2 2021	32,942	38,980	5.5	3.7
Q3 2021	33,211	39,354	5.2	4.1
Q4 2021	33,613	39,795	5.5	4.7
Q1 2022	33,764	40,228	4.0	4.9
Q2 2022	34,068	40,636	3.4	4.2
Q3 2022	34,852	41,569	4.9	5.6

Table 12.3.1 shows the four quarter average median earnings for females and males.

As explained on **page 46**, earnings data is a measure of earnings from all employment and is unadjusted for the number of hours worked i.e. the level can be impacted both by changes in the number of hours worked and rates of pay.

At the end of September 2022, the four quarter median average earnings for females was £34,852 (4.9% higher than a year earlier) and for males was £41,569 (5.6% higher than a year earlier).

Figure 12.3.1 shows the number of employees in each earnings band, averaged from September 2021 to September 2022. The distribution of female earnings shows a peak in the £20,000.01 to £30,000 category, whereas male earnings show a peak in the £30,000.01 to £40,000 category. There are a greater number of males than females in all earnings bands greater than £30,000.

Figure 12.3.1 Nominal median earnings by gender distribution

12.4 Earnings by economic sector

Table 12.4.1 Four quarter average earnings as at 30th September 2022

	Median earnings (£)	Lower quartile earnings (£)	Upper quartile earnings (£)
Agriculture, horticulture, fishing and quarrying	34,195	22,826	43,832
Manufacturing	31,935	23,042	42,529
Electricity, gas, steam and air conditioning supply	39,988	31,507	53,120
Water supply, sewerage, waste management and remediation activities	32,249	25,936	39,913
Construction	37,444	28,329	46,851
Wholesale, retail and repairs	26,281	18,545	36,293
Hostelry	24,686	19,765	30,888
Transport and storage	34,334	25,284	46,874
Information and communication	44,563	30,459	64,940
Finance	52,037	35,770	78,591
Real estate activities	39,200	27,705	54,917
Professional, business, scientific and technical activities	46,871	32,014	74,718
Administrative and support service activities	34,200	23,317	48,208
Public administration	42,401	28,931	56,799
Education	31,148	21,928	50,718
Human health, social and charitable work activities	27,828	19,357	39,061
Arts, entertainment and recreation	26,047	18,044	35,608
Other service activities	22,775	16,065	30,526
Activities of households as employers	26,884	14,728	36,577

Median, lower quartile and upper quartile earnings by sector are shown in **Table 12.4.1**.

People employed within the Finance sector had the highest four quarter average median earnings (£52,037) at the end of September 2022. This was 36.0% higher than the overall median. The upper quartile earnings in the Finance sector were 40.4% higher than the overall upper quartile earnings during the same period.
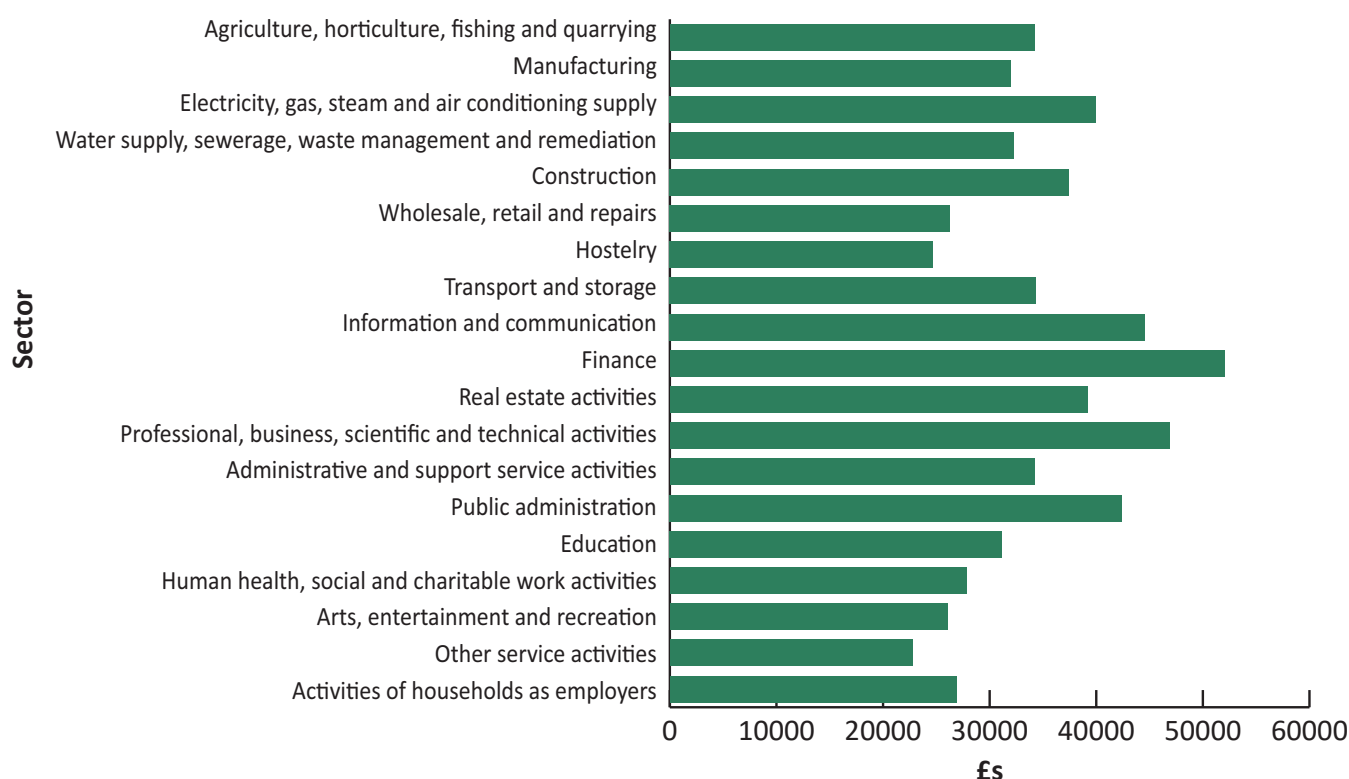
The Other service activities sector had the lowest four quarter average median earnings (£22,775) at the end of September 2022, which was 40.5% lower than the overall median. The Other service activities sector relates to personal service activities such as; beauty and hair salons, laundry services, funeral services and repair of computers and personal and/or household goods. It also includes membership organisations and trade unions.

Information on remuneration by sector has been added to this bulletin to help give a fuller picture of employment earnings trends (see **Section 13**).

Findings from the Community Surveys, undertaken in 2020 and 2021 are available at **www.gov.gg/covid19data** and provide more detailed information on how lockdown impacted on working, incomes and wellbeing.

Figure 12.4.1 Four quarter average earnings as at 30th September 2022

Median earnings by sector (as per **Table 12.4.1** on **page 50**) are shown graphically in **Figure 12.4.1**. It can be seen that the (highest) Finance sector median is more than double the (lowest) Other service activities median. The Other service activities sector relates to personal service activities such as; beauty and hair salons, laundry services, funeral services and repair of computers and personal and/or household goods. It also includes membership organisations and trade unions.

It should continue to be noted that, as explained on **page 46**, earnings data is a measure of earnings from all employment and is unadjusted for the number of hours worked i.e. the level can be impacted both by changes in the number of hours worked and rates of pay.

Information on remuneration by sector has been added to this bulletin to help give a fuller picture of employment earnings trends (see **Section 13**).

Findings from the Community Surveys, undertaken in 2020 and 2021 are available at **www.gov.gg/covid19data** and provide more detailed information on how lockdown impacted on working, incomes and wellbeing.

Figure 13.1.1 Annual percentage change in remuneration (rolling four quarter total)
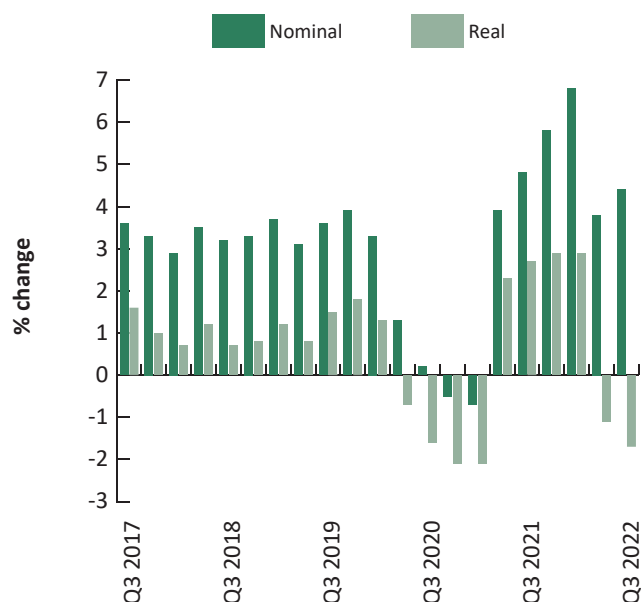
Table 13.1.1 Annual percentage change in remuneration (rolling four quarter total)

	% change (nominal)	% change (real)
Q3 2017	3.6	1.6
Q4 2017	3.3	1.0
Q1 2018	2.9	0.7
Q2 2018	3.5	1.2
Q3 2018	3.2	0.7
Q4 2018	3.3	0.8
Q1 2019	3.7	1.2
Q2 2019	3.1	0.8
Q3 2019	3.6	1.5
Q4 2019	3.9	1.8
Q1 2020	3.3	1.3
Q2 2020	1.3	-0.7
Q3 2020	0.2	-1.6
Q4 2020	-0.5	-2.1
Q1 2021	-0.7	-2.1
Q2 2021	3.9	2.3
Q3 2021	4.8	2.7
Q4 2021	5.8	2.9
Q1 2022	6.8	2.9
Q2 2022	3.8	-1.1
Q3 2022	4.4	-1.7

Remuneration refers to the sum of wages paid to employees, occupational pensions paid to past employees and other pensions paid from Retirement Annuity Trust Schemes, for example. The data is sourced from the Revenue Service. It has been added to this bulletin to help give a fuller picture of employment earnings trends.

The information presented in **Figure 13.1.1** and **Table 13.1.1** shows the change in the sum of remuneration for the four quarters ending in the quarter shown. Rolling four quarter sums are used to remove the seasonality in the figures and to present them on a comparable basis with earnings figures, which are presented as annual sums.

Real figures are presented alongside nominal to show trends before and after the effects of inflation have been removed. All real figures shown in this section of the report have been adjusted to September 2022 prices.

It can be seen in **Figure 13.1.1** and **Table 13.1.1** that there was an increase of 4.4% in nominal terms and a decrease of 1.7% in real terms in remuneration between the year ending 30th September 2021 and the year ending 30th September 2022.

Section 13.2 on the next page shows total remuneration for individual quarters.

Figure 13.2.1 Total quarterly remuneration by source (nominal)
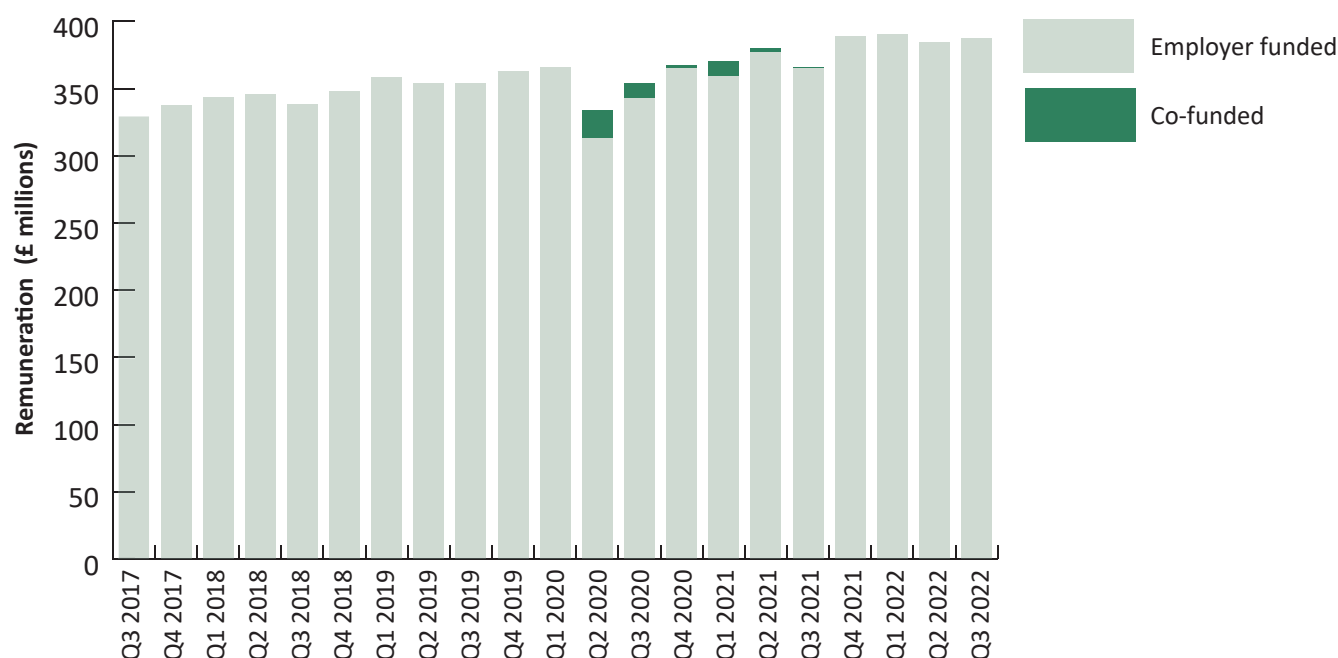
The information presented in **Figure 13.2.1** shows the total remuneration during each quarter by source.

On 24th March 2020, a Payroll Co-Sharing Scheme was introduced to provide financial support to businesses and self-employed workers in Guernsey who were negatively impacted as a result of the measures put in place to help slow the spread of COVID-19. Employers and the self-employed were supported in this way throughout 2020 and 2021. Some sectors, largely relating to tourism, have been supported for longer periods than other sectors.

It can be seen that total remuneration decreased from £366 million during the quarter ending 31st March 2020 to £334 million during the quarter ending 30th June 2020. Of the total £334 million during Q2 2020, at least £313 million was funded by employers and approximately £21 million (6%) was co-funded. These figures are described as approximations, since it is not possible to separate the portion received by employers to remunerate employees from the portion received by the self-employed, whose business incomes are not included within remuneration figures.

During the first quarter of 2021, approximately £11 million (3% of total remuneration) was co-funded, when the Bailiwick of Guernsey entered its second lockdown. **Figure 13.2.1** shows that as restrictions were eased after both the first and second lockdown, co-funded remuneration decreased as fewer sectors were eligible for payroll support.

During the second quarter of 2021, the sum of remuneration funded by employers was £377 million and the co-funded sum was approximately £3 million. During the fourth quarter of 2021, approximately £389 million was employer funded. It should be noted that some businesses refunded the support they received to the States of Guernsey.

Analysis by sector is shown on **pages 54 and 55**.

13.3 Remuneration - four quarter total by sector

Table 13.3.1 Remuneration by sector (rolling four quarter total) and annual percentage change (nominal)

|	(£ millions)			% change		
	Q3 2020	Q3 2021	Q3 2022	Q3 2020	Q3 2021	Q3 2022
Agriculture, horticulture, fishing and quarrying	6.9	7.9	8.4	-1.6	14.0	6.7
Manufacturing	19.9	21.8	21.9	-2.8	9.1	0.9
Electricity, gas, steam and air conditioning supply	12.1	12.6	12.5	-7.4	4.2	-1.0
Water supply, sewerage, waste management and remediation activities	3.5	3.9	4.6	-7.6	11.5	16.7
Construction	77.6	86.0	98.5	-1.2	10.9	14.4
Wholesale, retail and repairs	113.0	118.7	123.8	-2.8	5.1	4.3
Hostelry	36.6	39.6	48.7	-14.4	8.2	22.8
Transport and storage	36.5	37.5	39.4	-2.1	2.8	5.0
Information and communication	39.9	43.0	44.8	4.2	7.8	4.3
Finance	421.7	421.6	422.3	-2.0	0.0	0.2
Real estate activities	12.9	15.0	15.1	0.3	16.5	0.2
Professional, business, scientific and technical activities	147.2	154.7	160.7	2.5	5.1	3.9
Administrative and support service activities	74.1	83.5	96.7	-3.3	12.7	15.8
Public administration	292.2	306.1	310.4	6.3	4.8	1.4
Education	14.4	15.1	15.7	1.5	5.0	4.2
Human health, social and charitable work activities	51.2	56.4	59.3	3.1	10.2	5.1
Arts, entertainment and recreation	8.9	10.0	11.4	-4.0	11.6	13.8
Other service activities	9.2	9.8	10.7	-2.8	5.9	9.5
Activities of households as employers	0.7	1.3	1.9	67.7	93.2	52.0
Uncoded	38.1	39.4	41.7	8.8	3.6	5.7

The information presented in **Table 13.3.1** shows the sum of remuneration during the year ending 30th September 2020, the year ending 30th September 2021 and the year ending 30th September 2022 by sector in nominal terms. It should be noted that while occupational pensions paid to past employees by the States of Guernsey are included within the Public administration sector, others may be included within the Finance sector regardless of the sector the person had worked in. The figures presented in **Table 13.3.1** include co-funded remuneration.

Table 13.3.1 shows that the Finance sector contributed the most remuneration for the year ending 30th September 2022, at £422.3 million. The Public administration sector had the second highest total remuneration at £310.4 million for the year ending 30th September 2022. These two sectors employ the largest number of employees (see **pages 35 and 36**) and pay the largest pensions payments.

The Activities of households as employers sector had the lowest total remuneration for the years ending 30th September 2020, 2021 and 2022 (£0.7 million, £1.3 million and £1.9 million respectively, see **Table 13.3.1**.) Care must be taken when interpreting the annual percentage change in remuneration for this sector. It includes the activities of households as employers of domestic personnel such as cooks, gardeners, housekeepers, babysitters and private tutors, for example. The percentage changes in remuneration for all the other sectors are presented graphically on **page 55**.

13.3 Remuneration - four quarter total by sector

Figure 13.3.1 Annual percentage change in remuneration (rolling four quarter total) by sector (nominal)
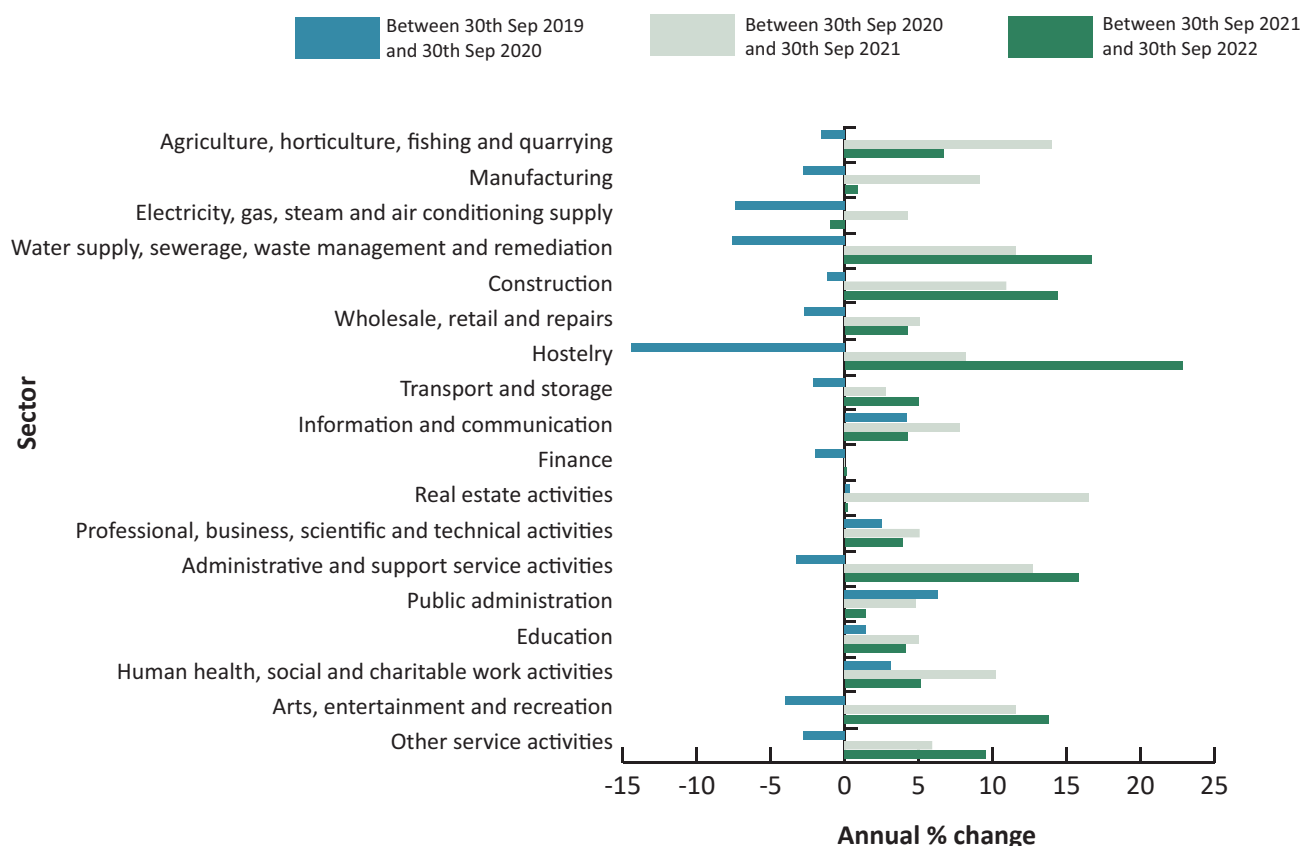
The information presented here shows the annual change in the four quarter sum of remuneration by sector. The figures include co-funded remuneration.

Seventeen of the eighteen economic sectors presented in **Figure 13.3.1** showed an increase in remuneration between the year ending 30th September 2021 and the year ending 30th September 2022. Notable increases were seen in Hostelry, Water supply, sewerage, waste management and remediation activities, Administrative and support service activities, Construction and Arts, entertainment and recreation (increases of 22.8%, 16.7%, 15.8%, 14.4% and 13.8% respectively).

Finance sector remuneration, which consistently makes the largest contribution to total remuneration, showed an annual increase of 0.2% over the year ending 30th September 2022.

Electricity, gas, steam and air conditioning supply was the only sector to show a decrease in remuneration between 30th September 2021 and 30th September 2022 (-1.0%).

Administrative Census

The data presented in this report is compiled using an administrative census method using data on individuals sourced from the following:

- Greffe birth and death records
- Income Tax
- Social Security contributions
- Social Security benefits
- Social Housing
- Population Management
- Health
- Driving Licenses and Vehicle Registrations
- Schools
- University grants
- The Electoral Roll
- Cadastre

The Rolling Electronic Census also incorporates data from the Corporate Housing Programme Monitoring System which adds information based on the residential properties individuals live in.

In cases where two or more of the above databases hold more than one copy of the information presented in this report, there is a process to decide which version to use. For dates of birth and gender for example, the most commonly used is the one taken to be correct for that individual. For other information such as addresses, or whether a person is normally resident at the time of the census snapshot, there's a more complex process to determine the correct information for that individual, which takes into account how the data is processed by each source.

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 Census 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 duplicates via the ongoing cross checking process and as more information becomes available. Some additional cross checks undertaken in 2018 led to the identification of duplicates born in 2014, 2015, 2016 and 2017. These have been removed and the process refined, so that the cause has been corrected.

Some extra sources of data were joined up with the Electronic Census in late 2022, resulting in a higher level of administrative changes during 2020 than normal. The additional information has resulted in corrections to some of the information previously held and improved confidence overall.

14.1 Methodology and further information

Population Projections

See **www.gov.gg/population** for more information and directions to the latest version.

The Economic Statistics (Guernsey and Alderney) Law, 2019

On 4th September 2019, the Economic Statistics (Guernsey and Alderney) Law was approved by the States of Guernsey (see **www.gov.gg/article/172311/The-Economic-Statistics-Guernsey-and-Alderney-Law-2019**). The new legislation will allow controlled sharing of some of the data collected for Income Tax purposes with the Data & Analysis service and will also enable the Data & Analysis service to ask employers to provide some additional data, which will enable improvements to be made to statistics, including the median earnings figures included in this bulletin. The additional information sought is as follows:

• Separation of information from employers on wages paid to current employees from pensions paid to past employees
• Numbers of hours worked by employees
• Value of employer contributions to occupational / secondary pension schemes

This should enable calculation of the median wage for full time employees, the number of people paid the minimum wage and the number of households with adults all working full time that are still below the relative income poverty threshold. Additional information will be included in this bulletin and other Data & Analysis publications when it becomes available.

14.2 Contact details

You may also be interested in other publications from States of Guernsey Data and Analysis Services, which are all available online at **www.gov.gg/data**. Please contact us for further information.

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

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