

Guernsey Annual Population Bulletin

31st March 2012 - Issue date 22nd March 2013



POLICY COUNCIL
THE STATES OF GUERNSEY

1.1 Introduction

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

1.2 Headlines

- At the end of March 2012, Guernsey's population was 63,085, which was 170 people (0.3%) higher than the previous year. The majority of the growth was due a natural increase of 127 people. Net migration contributed 43 people to the growth over the year.
- The number of live housing licences was 4,858 at the end of March 2012, compared to 5,271 at the same point in the previous year, a decrease of 413 licenses (7.8%)*.
- The median average age was 41 for males and 43 for females.
- There were 415 (1%) fewer people of working age (16 to 64 years old) in the year ending March 2012 than in the year ending March 2011. The group accounted for 66.5% of the population. The 0 to 15 years old age group increased by 59 people (0.6%) during the same period and the over 65 years age group increased by 526 people (5.1%).
- The population over 85 years of age (classified as the "oldest old") increased by 57 people (3.8%).
- Based on recent historic trends the total population is projected to increase to approximately 70,000 by 2040, before levelling off.

* The 2011 total includes 324 licences issued to Waitrose fit-out staff and start-up teams working in the Island for a short period of time over 31st March 2011. See [page 4](#) for more information. Excluding Waitrose, the number of live housing licenses has decreased by 1.8%.

Figure 1.2.1: Total population (at 31st March)

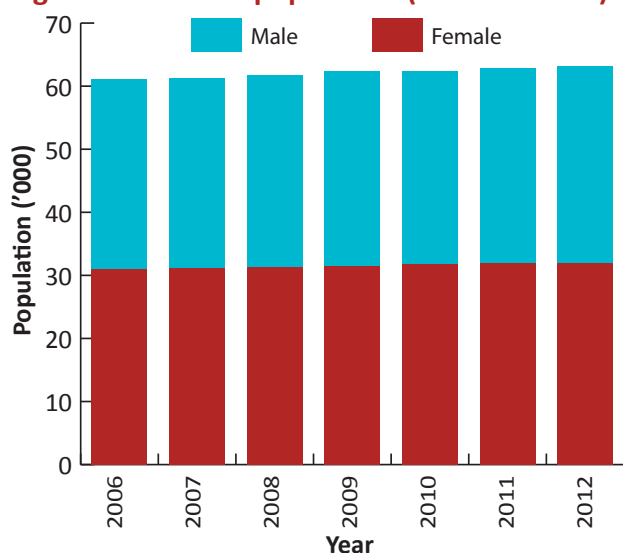


Table 1.2.1: Total population (at 31st March)

	2007	2008	2009	2010	2011	2012
Males	30,022	30,405	30,777	30,695	31,025	31,147
Females	31,153	31,321	31,497	31,736	31,890	31,938
Total population	61,175	61,726	62,274	62,431	62,915	63,085
Annual natural increase	-	108	111	143	102	127
Annual net migration	-	443	437	14	382	43
Annual change in population	146	551	548	157	484	170
Annual % change in population	0.2	0.9	0.9	0.3	0.8	0.3

2.1 Annual changes

Table 2.1.1: Total population at March 31st

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

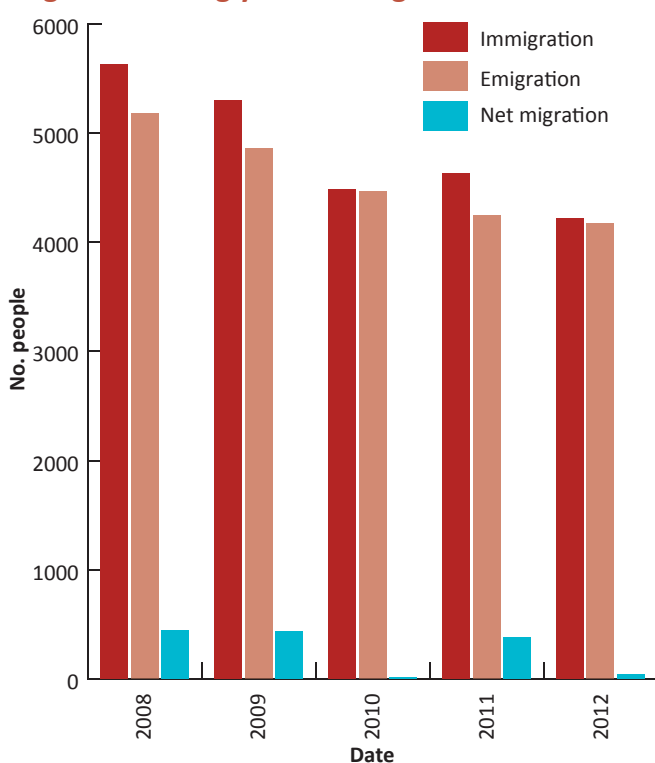
Table 2.1.2: Births, deaths and natural increase during years ending March 31st

	Births	Deaths	Natural increase
2008	603	495	108
2009	646	535	111
2010	656	513	143
2011	605	503	102
2012	674	547	127

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

	Immigration	Emigration	Net migration
2008	5,622	5,179	443
2009	5,297	4,860	437
2010	4,482	4,468	14
2011	4,631	4,249	382
2012	4,220	4,177	43

Figure 2.1.1: Immigration, emigration and net migration during years ending March 31st



Population headcounts have been calculated by the Social Security Department using administrative records since 2006.

Information on natural increase and net migration has also been available since the year ending March 2008.

The total population increased by 0.3% (170 people) to a total of 63,085 over the year ending 31st March 2012 (see **Table 2.1.1**).

This annual increase was a result of a natural increase of 127 people and net migration of 43 people during the year.

Natural increase in population is defined as the number of births minus the number of deaths during a particular time period. The natural increase has been relatively stable over the five years ending 2012, see **Table 2.1.2**.

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

As shown in **Table 2.1.3** and **Figure 2.1.1**, both immigration and emigration levels have generally decreased over the past five years. In 2012, as in 2010, net migration was comparatively low due to a larger reduction in immigration than emigration. In 2012, 43 more people moved to the Island than moved away, compared to 382 in the year ending March 2011.

3.1 Annual demographics

Age and gender distribution pyramids can be used to track changes in the population demographic over time. **Figure 3.1.1** provides a comparison of the distribution in 2007 compared to five years later, 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 booms' (after the second World War and in the 1960s), with the bulge moving up out of the 40 to 44 group and into the 45 to 49 group. This bulge will move progressively further up the pyramid as the 'baby boom' generation gets older.

The 65-69 age group has seen significant growth in the years between 2007 and 2012, increasing in size by 595 people (or 22.4%) as the first of the baby boom generation reach retirement age.

It can also be seen that the number of males and females in all the age bands from sixty years upwards increased during the five year period ending in 2012.

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

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

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

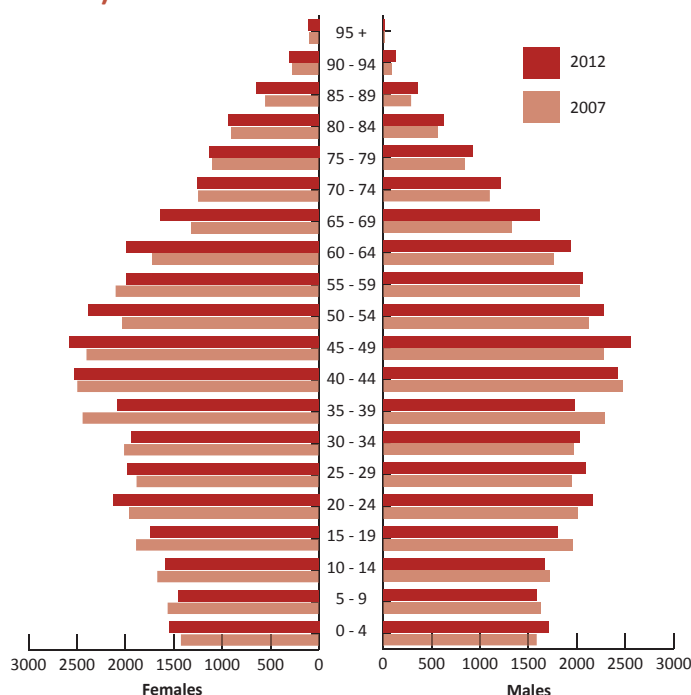


Table 3.1.1: Age and gender distribution (at 31st March)

	2007			2012		
	Female	Male	Total	Female	Male	Total
0 - 4	1,427	1,586	3,013	1,550	1,709	3,259
5 - 9	1,564	1,627	3,191	1,456	1,581	3,037
10 - 14	1,671	1,720	3,391	1,586	1,663	3,249
15 - 19	1,890	1,962	3,852	1,738	1,801	3,539
20 - 24	1,964	2,011	3,975	2,129	2,160	4,289
25 - 29	1,885	1,946	3,831	1,976	2,086	4,062
30 - 34	2,014	1,964	3,978	1,939	2,031	3,970
35 - 39	2,442	2,292	4,734	2,078	1,975	4,053
40 - 44	2,497	2,477	4,974	2,524	2,419	4,943
45 - 49	2,402	2,281	4,683	2,575	2,555	5,130
50 - 54	2,036	2,128	4,164	2,384	2,282	4,666
55 - 59	2,101	2,035	4,136	1,987	2,065	4,052
60 - 64	1,730	1,758	3,488	1,986	1,938	3,924
65 - 69	1,326	1,328	2,654	1,636	1,613	3,249
70 - 74	1,250	1,102	2,352	1,256	1,215	2,471
75 - 79	1,107	846	1,953	1,137	929	2,066
80 - 84	905	560	1,465	932	622	1,554
85 - 89	558	289	847	646	358	1,004
90 - 94	282	92	374	309	126	435
95 +	102	18	120	114	19	133
Total	31,153	30,022	61,175	31,938	31,147	63,085

4.1 Housing licences

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

	2007	2008	2009	2010	2011	2012
Hostelry	151	161	134	132	112	121
Finance	458	555	423	440	417	412
Professional, business, scientific and technical	n/a	n/a	205	203	234	199
Public Administration	80	90	113	113	111	112
Education	251	251	228	238	231	219
Human health, social & charitable work	244	275	268	280	287	296
Other	224	259	227	213	212	252
Total	1,408	1,591	1,598	1,619	1,604	1,611

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

	2007	2008	2009	2010	2011	2012
Agriculture, horticulture, fishing and quarrying	126	205	107	114	169	114
Construction	n/a	n/a	249	181	141	191
Wholesale, retail and repairs	n/a	n/a	256	181	484*	167
Hostelry	452	570	569	508	494	488
Finance	n/a	n/a	100	106	104	75
Other	379	683	335	331	260	260
Total	957	1,458	1,616	1,421	1,652*	1,295

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

NB At the time of producing the 2007 data there were some short-term licence applications which had not yet been processed by the Housing Department, and as such, the 2007 figures shown above are artificially low.

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

	2007	2008	2009	2010	2011	2012
"En famille" or one to one	1,185	1,265	1,341	1,345	1,324	1,237
Other	655	725	672	683	691	715
Total	1,840	1,990	2,013	2,028	2,015	1,952

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

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

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

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

Tables 4.1.1 and 4.1.2 show the numbers of employment-related licence holders by employment sector. More detailed statistics are available from 2009 onward. It should be noted that the sector breakdown used from 2009 onward is not strictly comparable with earlier years (where available).

Table 4.1.3 shows the numbers of non employment-related or compassionate licence holders. These figures are unaffected by the economic sector code changes, so are comparable year on year.

The number of essential employment and compassionate licences have remained relatively stable between 2009 and 2012, following increases in numbers during earlier years.

The number of short-term employment related housing licences is more liable to fluctuations due to specific events in the Island. For example, the establishment of Waitrose in Guernsey in 2011. After an upward trend between 2006 and 2009, the figure for 2012 sees short-term licences at their lowest level since 2007.

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

5.1 Quarterly changes

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

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

The highest level of natural increase in the period from the beginning of 2008 to 31st March 2012 was in the second quarter of 2011 when there were 71 more births than deaths. The lowest level of natural increase was in the first quarter of 2011 when there were 15 more deaths than births during the quarter.

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

Figure 5.1.1: Quarterly population changes

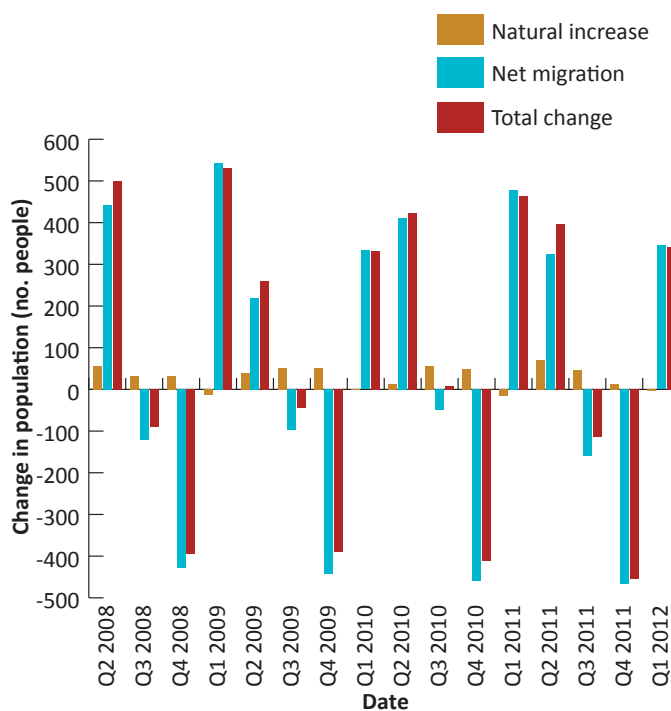


Table 5.1.1: Quarterly population changes

		Births during quarter	Deaths during quarter	Natural increase during quarter	Immigration during quarter	Emigration during quarter	Net migration during quarter	Total population at end of quarter	Quarterly change in population number	Quarterly % change in population
2008	Q1	143	111	32	1,598	854	744	61,726	776	1.3
2008	Q2	179	122	57	1,606	1,163	443	62,226	500	0.8
2008	Q3	147	114	33	1,374	1,496	-122	62,137	-89	-0.1
2008	Q4	162	129	33	953	1,381	-428	61,742	-395	-0.6
2009	Q1	158	170	-12	1,364	820	544	62,274	532	0.9
2009	Q2	165	125	40	1,266	1,046	220	62,534	260	0.4
2009	Q3	180	128	52	1,187	1,284	-97	62,489	-45	-0.1
2009	Q4	172	120	52	860	1,302	-442	62,099	-390	-0.6
2010	Q1	139	140	-1	1,169	836	333	62,431	332	0.5
2010	Q2	129	117	12	1,392	981	411	62,854	423	0.7
2010	Q3	181	124	57	1,102	1,150	-48	62,863	9	0.0
2010	Q4	164	116	48	831	1,291	-460	62,451	-412	-0.7
2011	Q1	131	146	-15	1,306	827	479	62,915	464	0.7
2011	Q2	191	120	71	1,362	1,037	325	63,311	396	0.6
2011	Q3	170	123	47	1,042	1,202	-160	63,198	-113	-0.2
2011	Q4	158	146	12	710	1,177	-467	62,743	-455	-0.7
2012	Q1	155	158	-3	1,106	761	345	63,085	342	0.5

6.1 Dependency ratio

Table 6.1.1: Dependency ratio (at 31st March)

	Dependency ratio
2007	0.49
2008	0.48
2009	0.48
2010	0.48
2011	0.48
2012	0.50

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

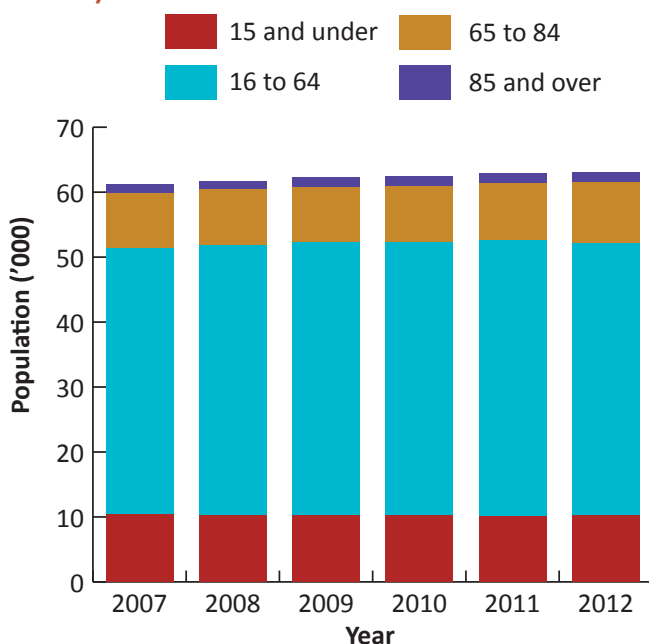


Table 6.1.2: Population by age group (at 31st March)

	15 and under	16 - 64	65 - 84	85 and over	Total
2007	10,379	41,031	8,424	1,341	61,175
2008	10,191	41,668	8,503	1,364	61,726
2009	10,235	42,015	8,600	1,424	62,274
2010	10,161	42,044	8,740	1,486	62,431
2011	10,151	42,378	8,871	1,515	62,915
2012	10,210	41,963	9,340	1,572	63,085

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

	15 and under (%)	16 - 64 (%)	65 - 84 (%)	85 and over (%)	Total (%)
2007	17.0	67.1	13.8	2.2	100
2008	16.5	67.5	13.8	2.2	100
2009	16.4	67.5	13.8	2.3	100
2010	16.3	67.3	14.0	2.4	100
2011	16.1	67.4	14.1	2.4	100
2012	16.2	66.5	14.8	2.5	100

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

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

The ratios (available from 2007 onward in **Table 6.1.1**) are calculated by dividing the number of individuals in the dependent age categories by the number of people in the working age category.

Trends in dependency ratios over time (and projected into the future) are used to assess the contribution rates required from the economically active in order to support the economically dependent.

In 2012, the overall dependency ratio was 0.50, which means that for every 100 people of working age (between the ages of 16 and 64) there were 50 people of dependant age. Prior to 2012, the ratio had remained at 0.48 for the four years from 2008 to 2011.

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

Over the year ending March 2012, the youngest and oldest members of the population increased in number (0.6% for those aged 0-15 and 3.8% for those aged 85 and over). The number of people of working age (16-64 years) decreased by 1.0%. The proportion of people aged 65-84 years saw a greater increase over the year ending March 2012 (5.3%) than over the year ending March 2011 (1.5%). This is likely to be due to many post-war ‘baby boomers’ turning 65.

The proportion of people in the dependent age categories rose from 32.6% in 2011 to 33.5% in 2012.

7.1 Projections - best match model

Population projections are produced periodically by the UK Government Actuary's Department¹ (GAD) primarily for the purpose of actuarial review of the Guernsey Insurance Fund for the Social Security Department.

A range of projection models are produced by the actuaries to reflect different migration scenarios. The model presented here is the one which best matches recent historic data trends, so at present is taken to be the most likely in terms of future trends. It is based on a variety of assumptions including an average net migration of plus 200 people per annum. An alternative model (based on varying migration levels to achieve a constant population, as per States policy) is provided overleaf. For more information, please see the methodology section on [page 9](#).

This model (which was updated by GAD in 2011) projects the total population to increase gradually to about 70,000 in 2035 (see [Figure 7.1.1](#) and [Table 7.1.1](#)). This is primarily as a result of the ageing of the baby boom generation. The population is projected to then level off and decline from 2055 onwards (but at a slower rate than earlier increases since average life expectancy is projected to increase).

The age band 65 to 66 is shown on the graph, since between the years 2020 and 2032, the pension age will be gradually increased from 65 to 67.

The proportion of people under 15 is projected to fall from 16.3% of the total population in 2010 to 12.8% in 2070 (see [Table 7.1.2](#)). The proportion of people aged 16 to 64 is also projected to decrease (from 67.3% to 54.1%), whilst the number of people over 65 is projected to increase (from 16.4% to 33.1%).

The result (shown in [Table 7.1.3](#)) is a projected dependency ratio of 0.85 by 2070 (or 0.77 based on the upper limit of the working age group increasing to 66 years), compared to 0.48 in 2010.

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

Figure 7.1.1: Projected population by age group

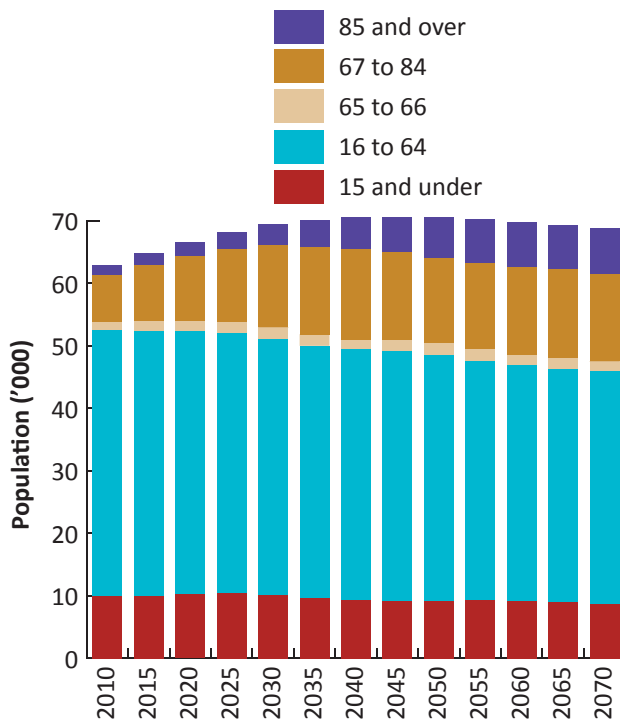


Table 7.1.1: Projected population by age group

	15 and under	16 - 64	65 - 84	85 and over	Total
2020	10,235	42,219	11,913	2,258	66,625
2030	10,117	40,974	15,027	3,249	69,368
2040	9,382	40,031	16,044	5,055	70,512
2050	9,266	39,301	15,450	6,516	70,534
2060	9,190	37,685	15,742	7,182	69,799
2070	8,790	37,233	15,468	7,274	68,765

Table 7.1.2: Projected percentage of population by age group

	15 and under (%)	16 - 64 (%)	65 - 84 (%)	85 and over (%)	Total (%)
2020	15.4	63.4	17.9	3.4	100
2030	14.6	59.1	21.7	4.7	100
2040	13.3	56.8	22.8	7.2	100
2050	13.1	55.7	21.9	9.2	100
2060	13.2	54.0	22.6	10.3	100
2070	12.8	54.1	22.5	10.6	100

Table 7.1.3: Projected dependency ratios

	Dependency ratio
2020	0.58
2030	0.69
2040	0.76
2050	0.79
2060	0.85
2070	0.85

7.2 Projections - alternative model (constant population, varying migration)

The model shown in **Figure 7.2.1** and **Table 7.2.1** reflects how the demographics of the population is projected to change if the States successfully implements its policy to keep the total population stable. The model is based on a varying level of net migration, which achieves a constant total when combined with natural population changes.

The model uses negative net migration (i.e. more people moving off the Island than onto it) in the years from 2010 to around 2025. The effect is to counteract the population increases which are projected to result primarily from the ageing baby boom generation and increasing life expectancy.

The ageing and death of the baby boom population “bulge”, combined with stable or reducing fertility rates is projected to result in natural population decreases from around 2050 onward. This model balances this with positive net migration (i.e. more people moving onto the Island than off it) towards the end of the projection period.

In this model, the proportion of people under 15 is projected to fall from 16.3% of the total population in 2010 to 13.0% in 2070 (see **Table 7.2.2**). The proportion of people aged 16 to 64 is also projected to decrease (from 67.3% to 57.1%), whilst the number of people over 65 is projected to increase (from 16.4% to 29.8%).

The result (shown in **Table 7.2.3**) is a projected dependency ratio of 0.86 by 2050, reducing to 0.75 by 2070 (or 0.85 and 0.74 respectively based on the upper limit of the working age group increasing to 66 years), compared to 0.48 in 2010.

NB - The age band 65 to 66 is shown on the graph, since between the years 2020 and 2032, the pension age will be gradually increased from 65 to 67.

Figure 7.2.1: Projected population by age group

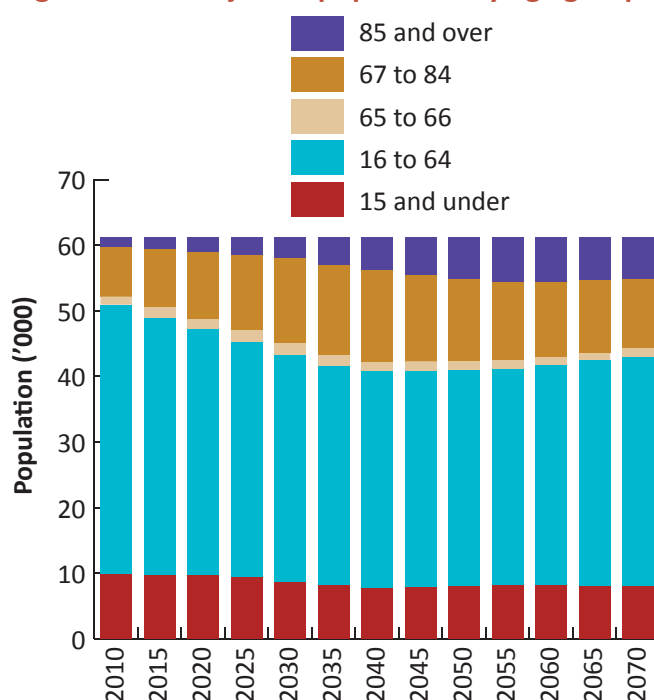


Table 7.2.1: Projected population by age group

	15 and under	16 - 64	65 - 84	85 and over	Total
2020	9,635	37,513	11,802	2,225	61,175
2030	8,683	34,471	14,828	3,194	61,175
2040	7,755	33,015	15,389	5,016	61,175
2050	8,024	32,869	13,873	6,409	61,175
2060	8,160	33,538	12,649	6,828	61,175
2070	7,982	34,956	11,822	6,415	61,175

Table 7.2.2: Projected percentage of population by age group

	15 and under (%)	16 - 64 (%)	65 - 84 (%)	85 and over (%)	Total (%)
2020	15.7	61.3	19.3	3.6	100
2030	14.2	56.3	24.2	5.2	100
2040	12.7	54.0	25.2	8.2	100
2050	13.1	53.7	22.7	10.5	100
2060	13.3	54.8	20.7	11.2	100
2070	13.0	57.1	19.3	10.5	100

Table 7.2.3: Projected dependency ratios

	Dependency ratio
2020	0.63
2030	0.77
2040	0.85
2050	0.86
2060	0.82
2070	0.75

8.1 Methodology and further information

Headcounts

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

This data has been available on an annual basis since March 2006 and quarterly since March 2007.

Prior to this, population figures were calculated using data collected by census every 5 or ten years; the last census was held in 2001. However, due to the different method and count date, the figures produced by the two methodologies are not directly comparable.

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

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

Projections

Population projections are provided periodically by the UK Government Actuary's Department (GAD) primarily for the purpose of actuarial review of the Guernsey Insurance Fund for the Social Security Department. A range of projection models are produced by the actuaries to reflect different migration scenarios. They also use a range of other assumptions in their calculations e.g. fertility and mortality rates.

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

This year (as per the last three years), the model based on a migration scenario of plus 200 net per annum best matched recent historic data trends, so is taken to be the most likely in terms of future trends. The projected population numbers presented are the same as those presented last year, in line with GAD's latest models.

In addition, the constant population model provided by GAD is included to show how the demographics are projected to change if the States achieves its policy to maintain a constant population by varying levels of migration.

9.1 Contact details

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

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