

Chapter 7: Population Projections

- **Migration Scenarios**

- **Structure of the Population**
 - Zero net migration
 - 200 net immigration per annum
 - 400 net immigration per annum
 - 200 net emigration per annum
 - 400 net emigration per annum

The graphs shown in this chapter summarise population projections prepared by the UK Government Actuary's Department on the basis of the 2001 Census data.

The projections start from the Census position in 2001 and estimate the position at March of each year up to 2031.

Fertility rates and mortality rates are based on Jersey experience, projected into the future using the changes projected for the UK, which in the past have been similar to changes in Jersey. The fertility and mortality rates have been estimated using information up to and including the year 2000.

Migration Scenarios

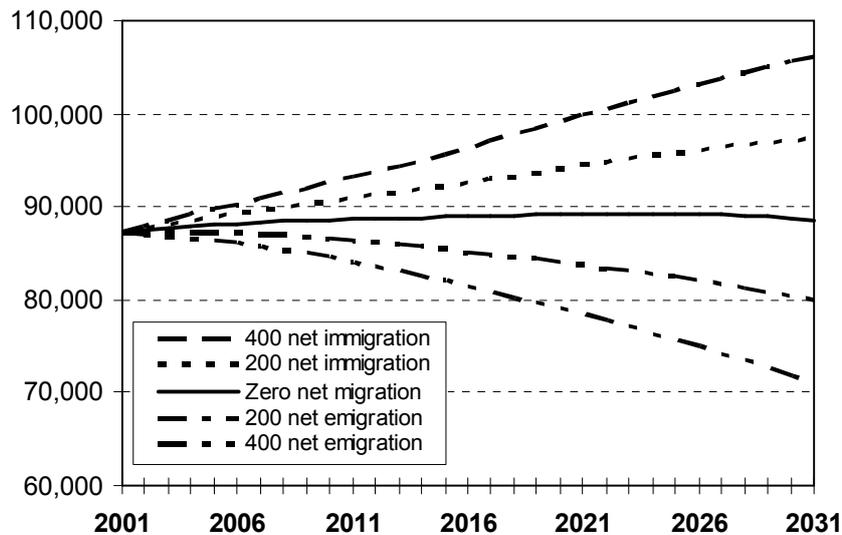
Five migration scenarios have been examined in preparing these projections:

- no net migration;
- net immigration of 200 per year and 400 per year;
- net emigration of 200 per year and 400 per year.

The net immigrants and emigrants are assumed to be in the 16 to 25 age range.

All projections start from the total resident population figure of 87,186 recorded by the 2001 Census.

Figure 7.1 - Migration Scenarios



As indicated in Figure 7.1, under **zero net migration**, the overall population remains relatively constant. The total actually rises to 89,200 in 2023 and falls slowly back to 88,620 by 2031. The variations arise from different birth and death rates and small changes in the numbers of women of child-bearing age. Population growth over the entire 30-year period is +1.6%, or +0.05 % per year on average.

200 net immigration per year leads to fairly steady growth throughout the period, reaching 97,340 by 2031. Over the 30 years considered, population growth is +11.6%, or +0.37% per year on average.

400 net immigration per year results in a population of 106,180 by 2031, an increase of +21.8% over the 30-year period, corresponding to an average growth rate of +0.66% per year.

In contrast, both emigration scenarios lead to a fall in the total population over the 30-year period.

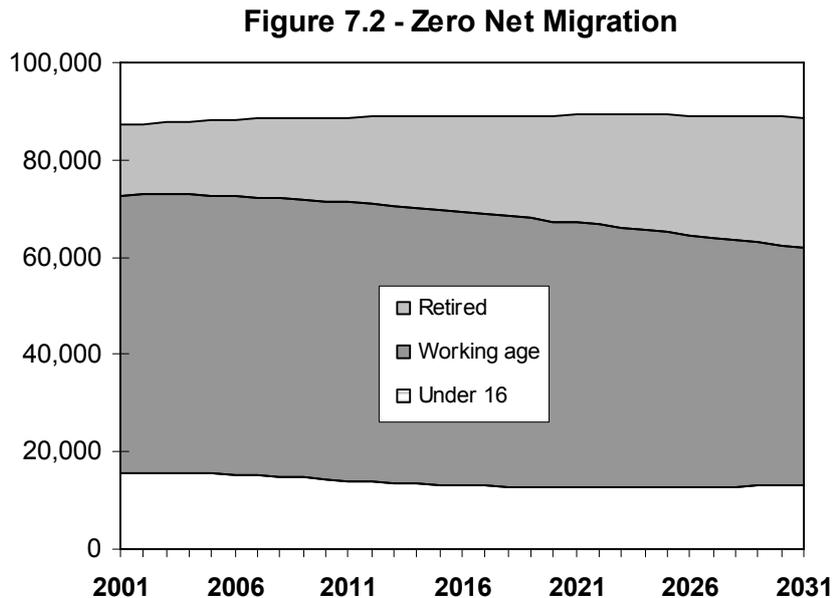
200 net emigration per year results in an essentially steady population of just over 87,200 until 2005, after which there is a long-term decline, leading to a total of 79,850 in 2031. Over the 30-year period, the population decreases by -8.4%, corresponding to an average annual decrease of -0.29%.

400 net emigration per year leads to a reduction in the total population for every year between 2001 and 2031. The rate of decline increases with time, resulting in a total population of: 84,130 by 2011; 78,400 by 2021; and 70,980 by 2031. The 30-year reduction is -18.6%, an average reduction of -0.68% per year.

Changes in the Structure of the Population

Zero net migration

The structure of the population under this scenario may be more fully appreciated from Figure 7.2.



In this scenario, the number of under-16's rises from 15,670 in 2001 to 15,770 in 2003 before falling quite steeply, reaching a trough of 12,620 in 2022, a drop of 20%. By 2031 the number has increased slightly to 13,000.

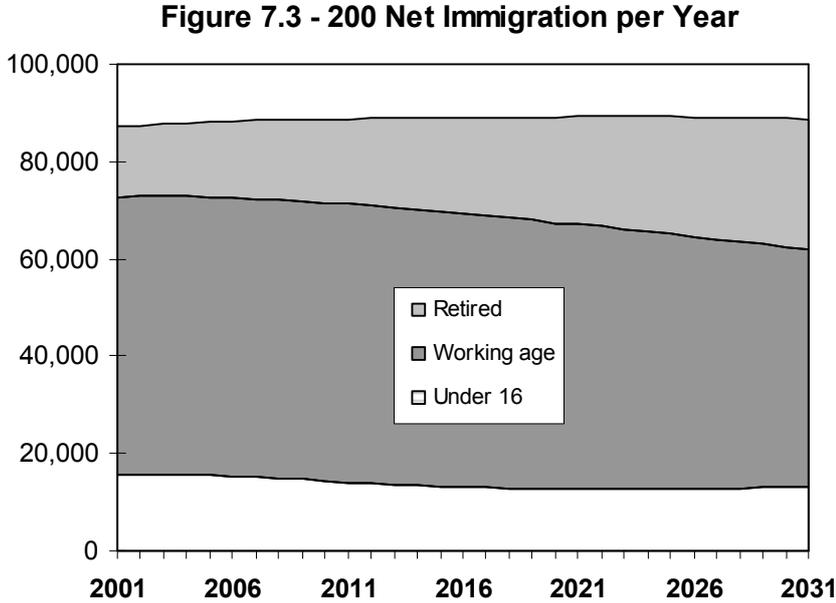
In contrast, the retirement age population, currently 14,510, rises increasingly steeply, reaching 26,830 by 2031 - an increase of 85%.

The working age population (16-59/64 for women/men) initially increases from 57,020 to 57,280 by 2007, but then declines, dropping to 48,790 by 2031.

Thus with no net migration, the proportion of the total who are of working age, currently 65% (0.53 dependants per worker), would fall by year 2031 to 55% (0.82 dependants per worker).

Put another way, to maintain the same standard of living for all residents, all other things being equal, the productivity of the workforce would need to increase by +19% over the next 30 years, that is by +0.57% per year on average.

200 Net Immigration per Annum



In this scenario, the retired population, currently 14,510, rises identically to the zero migration scenario, reaching 26,830 by 2031.

The number of under-16's rises, as in the zero migration scenario, to about 15,780 in 2003 and then declines slowly to about 13,820 in 2016 before rising again to 15,270 by 2031.

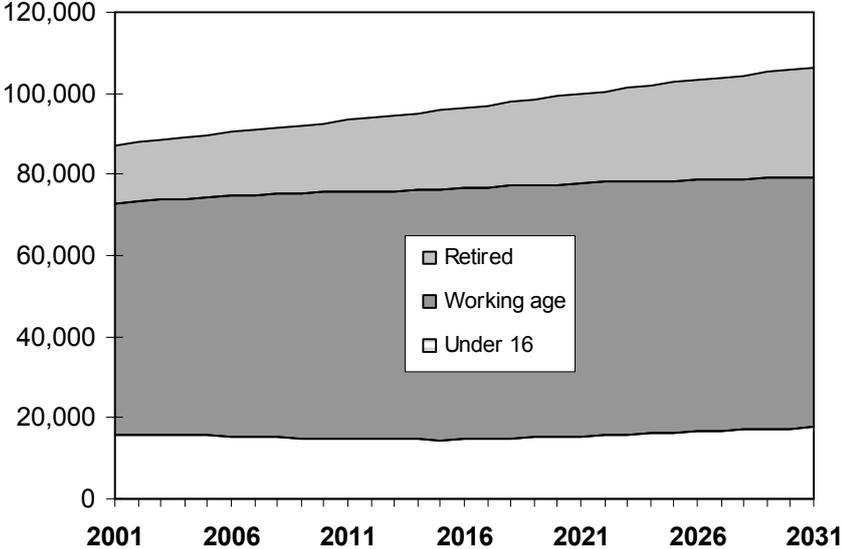
Due to some inward migration of people of working age, the number of all people in this age group, 57,020 in 2001, rises to 59,110 in 2011, stays virtually constant until 2018 and then falls slowly to 55,240 by 2031.

The proportion of the total population that is of working age - currently 65.4% - falls a little more slowly than before. By 2031 it has reached 56.7%, corresponding to 0.76 dependants per worker.

The approximate productivity gain needed to maintain everyone's standard of living, all other things being equal, is +15.3% over the next 30 years, that is +0.47% per year, on average.

400 Net Immigration per Annum

Figure 7.4 - 400 Net Immigration per Year



In this scenario, the number of under-16's rises slightly to about 15,790 in 2003, then falls to 14,500 in 2015, and rises again to 17,560 by 2030.

The retired population, currently 14,510, rises identically to the other scenarios, reaching 26,830 by 2031; this is because the assumed new immigrants do not reach retirement age in the 30-year time frame under consideration.

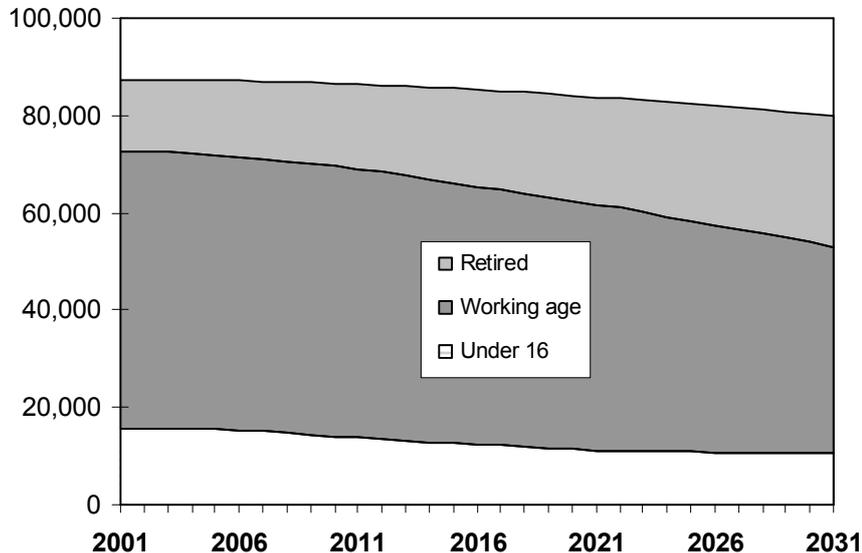
The number of people of working age grows from 57,020 in 2001 to 62,370 in 2022, and then declines slightly to 61,780 by 2031.

The proportion of workers to the total population changes very slowly at first, staying at around 65.5% until 2011 then falling to 58.2% by 2031, corresponding to 0.72 dependants per worker.

The estimated productivity gain needed to maintain everyone's standard of living in this scenario, other things being equal, is +12.4% over 30 years, an average of +0.39% per year.

200 Net Emigration per Annum

Figure 7.5 - 200 Net Emigration per Year



In this emigration scenario, the number of under-16's initially rises very slightly, as in the zero and net immigration scenarios. However, after reaching a maximum of approximately 15,760 in 2003, there is a rapid decline to a total of 11,250 by 2021, after which the rate of decline reduces. The population of under-16's in 2031 is 10,710, representing an overall reduction of 31.6%.

The retired population, currently 14,510, rises identically to the zero and net immigration scenarios, since the net emigrants are assumed to be in the young working age category and would not have reached retirement age in the period up to 2031. The retired population therefore attains 26,830 by 2031, as in the previous scenarios presented.

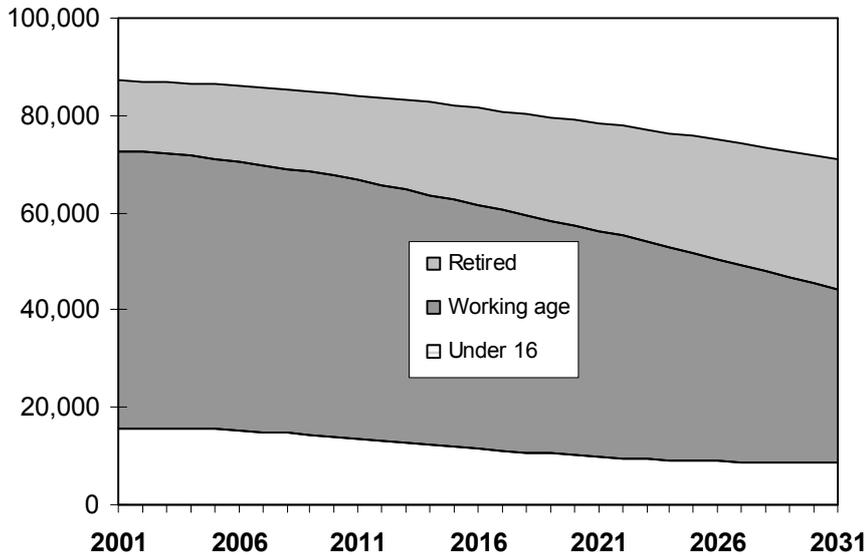
Due to the assumption that the net emigrants are of young working age, the total number of people of working age decreases throughout the 30-year period from the current 57,020. The annual decline is small until 2006, after which the total number decreases at a faster rate up to 2022 (49,870) and at a still faster rate thereafter, falling to 42,310 by 2031.

The proportion of the total population that is of working age (currently 65.4%) falls more rapidly than for the zero and net immigration scenarios. By 2031 this figure has reached 53.0%, with 0.89 dependants per worker.

The approximate productivity gain necessary to maintain the standard of living of all residents, all other things being equal, is +23.4% over 30 years; this represents an average annual increase of +0.70%.

400 Net Emigration per Annum

Figure 7.6 - 400 Net Emigration per Year



The number of under-16's in this scenario initially changes in a similar manner to that of the 200 net emigration scenario: a small increase to a maximum of about 15,750 in 2003. However, there is then a more rapid decrease than in the previous scenario, resulting in a total number of under-16's of 9,870 by 2021. After this date the rate of decrease reduces, leading to 8,440 by 2031.

The retirement age population increases identically to all other scenarios, as previously explained.

The working age population (currently 57,020) decreases more rapidly at every stage of the 30-year period, falling to 35,710 by 2031. The proportion of workers to the total population falls markedly, from the 65.4% of 2001 to 50.3% by 2031; the latter represents 0.99 dependants per worker.

The estimated productivity gain required to maintain everyone's standard of living in this scenario, all other things being equal, is +30.0% over 30 years, corresponding to an average annual increase in productivity of +0.88%.