Jersey households and housing needs projections

2025 to 2040

Statistics Jersey

Tier 1 Statistic

✅ Tier 1 statistics

This report contains Tier 1 Statistics, as designated under the Statistics and Census (Jersey) Law 2018. Tier 1 Statistics are those identified as essential for decision-making in Jersey, meeting the highest standards of quality, integrity, and continuity.

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1 Introduction

This report has been produced based on the latest Population projections 2025 to 2080 by Statistics Jersey. Projections for the total number and type of households are provided up to 2040. The changes in household structures seen across the 2011 and 2021 census are used to inform these projections. The projection range is shorter than the population projections, which run to 2080, due to household projections being particularly sensitive to policy changes and household composition assumptions, making longer term projections potentially unreliable.

It is important to note that the projections are not forecasts and so will differ from the actual future outcomes. They assume that current trends and behaviour in respect of fertility, mortality, migration and household formation continue forward over the projection period. Changes to these assumptions will impact the results, therefore the findings should be considered an estimate based on recent trends to inform decision making. For more on this please see the separate methodology document.

The report also uses the change in the numbers and types of households to provide an objective assessment of future housing needs over the projection period and includes breakdowns of the projected change in the numbers, type, and size of dwellings. This assessment is based around the existing distribution of property type to households as observed in the 2021 Census. It is based solely on the projected demographic change and assumes that the distribution of households to property type and size remains the same as was observed in the census.

The projections are presented as a series of scenarios based on a set level of net migration experienced every year over the projection period. These are:

- Net nil migration, where the number of people arriving equals the number of people leaving
- +200 net migration, where 200 arrive on the Island over and above the number that leave
- +400 net migration
- +600 net migration
- +800 net migration

The migration scenarios in this report have changed since the previous projections report. Statistics Jersey engaged with key internal users of the projections about the proposed improvements. See section 2.4 in the methodology document for more details on the updated scenarios and assumptions.

Projections using two of the previous migration scenarios (+325 and +700) have been produced to enable comparisons with previous projections. These are available in supplementary tables and on Open Data.

The report provides detailed data tables for each of these scenarios, with the report being split into Household projections and Housing needs projections.

2   Overview of methodology

The Population projections report showed that the overall population size of Jersey will be heavily influenced by the level of net migration experienced over the projection period. The fertility and life expectancy assumptions used for the scenarios in this report are the mid-range assumptions.

Figure 1 shows the projected total population for the different scenarios.

Figure 1: The population is projected to marginally increase until 2040 with +400 net migration
Total projected population for different migration scenarios
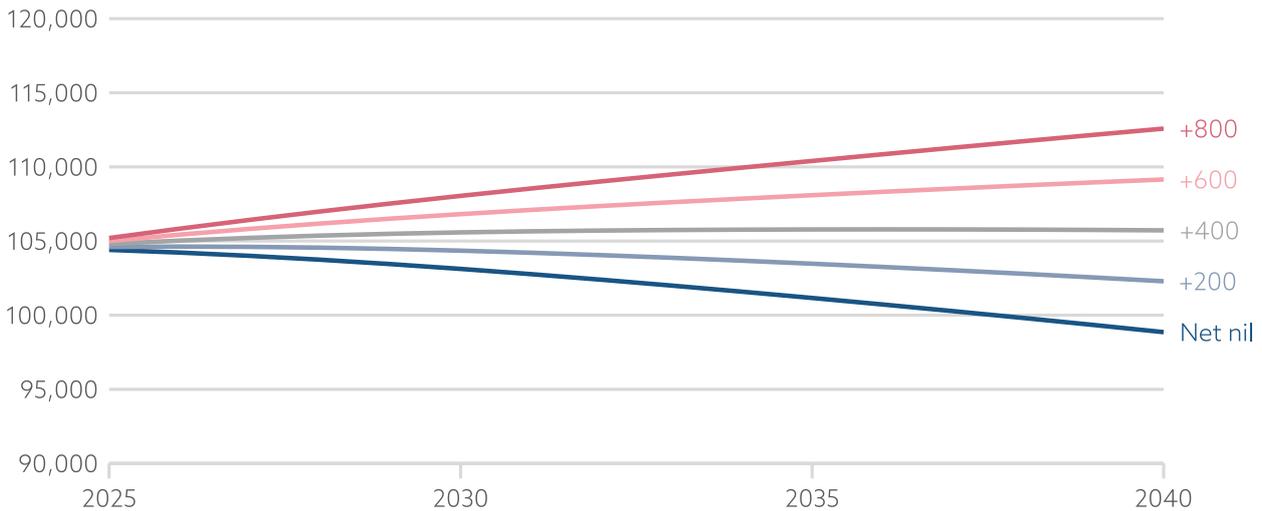
When considering household projections and the associated need for housing, the starting point is these population projections, however changes to household composition over time also need to be taken into account.
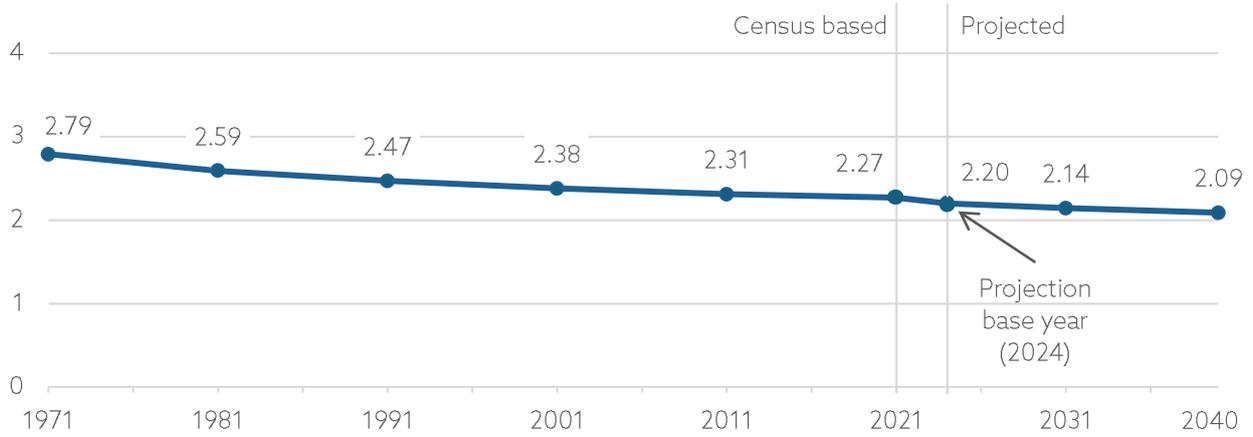
As seen from previous census data in Figure 2, the average number of people per household has been declining over the last five decades.

These household projections also project forward the changes in household composition that have been observed over time to provide a better estimate of the future number of households under these scenarios. To do this the proportion of people that were a head of household was calculated by age group, sex, household type and whether qualified or non-qualified from the 2011 and 2021 censuses, and projected forward based on the observed change between the censuses. The separate methodology document gives more details.

Projecting the housing need from the base year (2024) and onwards shows a sharper decrease in average household size than previous trends suggest. This is due to changes in population demographics, in particular, an ageing population leading to increased numbers of older residents being projected to live in single adult households and fewer younger working age adults resulting in lower average sizes for family households.

Figure 2: Census data shows the average number of people per household has been declining over the last few decades

Average number of people per household over time (with projected net nil migration scenario)[1]

Census based | Projected

2.79	
2.59	
2.47	
2.38	
2.31	
2.27	
2.20 2.14	
2.09	

Projection base year (2024)

1971 1981 1991 2001 2011 2021 2031 2040

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[1] Net nil scenario used for illustration purposes, however, the migration scenario makes little to no difference to the average household size over the time period.

3 Headlines

Future numbers of households are impacted by changes in household size and types as well as projected numbers of people living in Jersey.

The household and housing needs projections indicate that for a +400 net migration scenario:

- the number of households will increase from just under 47,000 in 2025 to over 49,000 in 2040
- 140 qualified and 30 non-qualified additional units of accommodation would be required each year
- across the period to 2040, a total of 680 additional qualified 3-bed houses, and 500 additional qualified 1-bed flats would be required

4 Household projections

The following pages provide detailed results of each of the five migration scenarios covered in this report.

For each scenario a detailed data table is provided detailing the projected number of the different household types at five-year intervals.[2]

The total number of projected households is summarised in Figure 3 and Table 1.

Figure 3: Total projected households set to increase by 2040 for all positive net migration scenarios

Number of households over time for different net migration scenarios
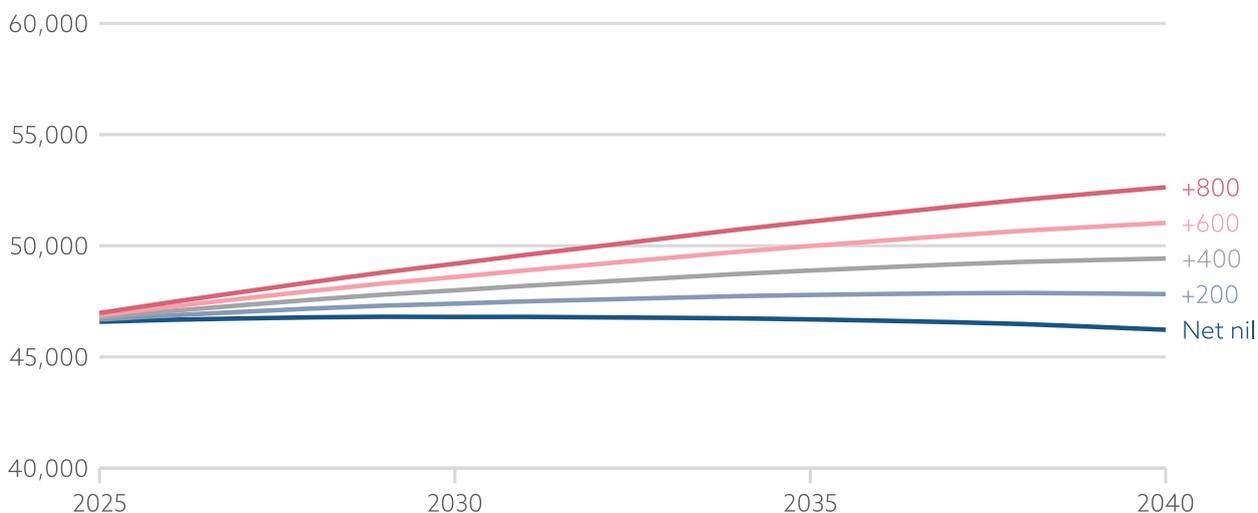
Table 1: Total projected households for different net migration scenarios

Net migration	2025	2030	2035	2040
+800	46,980	49,190	51,090	52,630
+600	46,880	48,590	49,990	51,030
+400	46,780	48,000	48,890	49,430
+200	46,680	47,400	47,790	47,820
Net nil	46,580	46,800	46,690	46,220

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[2] Detailed tables at one-year intervals can be found in supplementary tables.

4.1   Net nil migration

Table 2: Household projection table by household type, net nil migration

	2025	2030	2035	2040
Projected population	104,400	103,120	101,160	98,860
Projected population in private households*	102,210	100,840	98,760	96,290
Household type:				
Single adult	15,140	15,620	15,810	15,860
Two adults	15,130	15,300	15,250	15,060
One adult and one child	900	870	860	840
Three or more adults and any number of children	7,730	7,710	7,660	7,470
One adult and two or more children	480	440	400	380
Two adults and one or more children	7,200	6,850	6,710	6,610
Total private households	**46,580**	**46,800**	**46,690**	**46,220**

*The remaining population is projected to reside in communal establishments

4.2   +200 net migration

Table 3: Household projection table by household type, +200 net migration

	2025	2030	2035	2040
Projected population	104,600	104,350	103,470	102,290
Projected population in private households*	102,410	102,070	101,070	99,720
Household type:				
Single adult	15,180	15,860	16,240	16,460
Two adults	15,150	15,460	15,520	15,450
One adult and one child	900	880	880	880
Three or more adults and any number of children	7,740	7,780	7,790	7,680
One adult and two or more children	480	440	420	400
Two adults and one or more children	7,220	6,970	6,940	6,960
Total private households	**46,680**	**47,400**	**47,790**	**47,820**

*The remaining population is projected to reside in communal establishments

4.3   +400 net migration

Table 4: Household projection table by household type, +400 net migration

	2025	2030	2035	2040
Projected population	104,800	105,580	105,780	105,720
Projected population in private households*	102,610	103,300	103,380	103,150
Household type:				
Single adult	15,220	16,100	16,670	17,060
Two adults	15,180	15,620	15,790	15,840
One adult and one child	900	900	910	920
Three or more adults and any number of children	7,750	7,850	7,920	7,890
One adult and two or more children	490	450	430	420
Two adults and one or more children	7,240	7,080	7,170	7,300
Total private households	**46,780**	**48,000**	**48,890**	**49,430**

*The remaining population is projected to reside in communal establishments

4.4   +600 net migration

Table 5: Household projection table by household type, +600 net migration

	2025	2030	2035	2040
Projected population	105,000	106,820	108,090	109,150
Projected population in private households*	102,810	104,530	105,690	106,580
Household type:				
Single adult	15,260	16,340	17,090	17,650
Two adults	15,210	15,770	16,070	16,230
One adult and one child	910	910	930	960
Three or more adults and any number of children	7,760	7,910	8,050	8,090
One adult and two or more children	490	460	450	440
Two adults and one or more children	7,260	7,200	7,390	7,650
Total private households	**46,880**	**48,590**	**49,990**	**51,030**

*The remaining population is projected to reside in communal establishments

4.5 +800 net migration

Table 6: Household projection table by household type, +800 net migration

	2025	2030	2035	2040
Projected population	105,200	108,050	110,400	112,580
Projected population in private households*	103,010	105,760	108,000	110,010
Household type:				
Single adult	15,300	16,580	17,520	18,250
Two adults	15,240	15,930	16,340	16,620
One adult and one child	910	920	960	1,000
Three or more adults and any number of children	7,770	7,980	8,180	8,300
One adult and two or more children	490	460	460	460
Two adults and one or more children	7,280	7,320	7,620	7,990
Total private households	**46,980**	**49,190**	**51,090**	**52,630**

*The remaining population is projected to reside in communal establishments

5 Housing needs projections

The housing needs projections build upon the above household projections and assume that each projected household will require a unit of accommodation. Additional information from the 2021 Census is used to estimate the relationship between household types and the accommodation required. See methodology document for more details.

This assessment is based around the existing distribution of property type to households as observed in the 2021 census. It is based solely on the projected demographic change and assumes that the distribution of households to property type and size follows the same patterns as were observed at the time of the census.

For each scenario the housing needs for different accommodation types are projected. The difference in the projected number of each housing type compared to the starting point at the beginning of the projections gives the final assessment of housing need.

The total number of projected qualified and non-qualified units are summarised in the tables below.[3]

Table 7: Total additional projected qualified units required for different net migration scenarios

Net migration	2030	2035	2040	Average additional units required per year
+800	1,050	2,320	3,570	240
+600	920	1,960	2,860	190
+400	790	1,600	2,160	140
+200	660	1,240	1,450	100
Net nil	530	880	740	50

Table 8: Total additional projected non-qualified units required for different net migration scenarios

Net migration	2030	2035	2040	Average additional units required per year
+800	1,160	1,780	2,090	140
+600	790	1,140	1,290	90
+400	430	500	490	30
+200	60	-140	-310	-20
Net nil	-310	-780	-1,110	-70

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[3] Note that the mapping of residents to whether they require qualified and non-qualified housing units is different to that used in the previous household projections report. See section 6.3 in the explainer document for more details.

Net nil migration

Table 9: Projected housing needs table by accommodation type, net nil migration

	2025	2030	2035	2040
Projected households	46,580	46,800	46,690	46,220
Change in households	0	220	110	-360
Change in qualified accommodation since 2025				
Flat 1-bed	0	200	290	230
Flat 2-bed	0	40	70	20
Flat 3+ bed	0	0	10	10
House 1-bed	0	30	50	60
House 2-bed	0	100	170	200
House 3-bed	0	130	250	270
House 4-bed	0	10	10	-40
House 5+ bed	0	20	30	0
Total	0	530	880	740
Change in non-qualified accommodation since 2025				
Flat 1-bed	0	-190	-470	-680
Flat 2-bed	0	-70	-160	-220
Flat 3+ bed	0	-20	-40	-50
House 1-bed	0	-10	-20	-30
House 2-bed	0	-10	-30	-50
House 3-bed	0	-10	-30	-50
House 4-bed	0	0	-10	-10
House 5+ bed	0	0	-10	-10
Total	0	-310	-780	-1,110

5.1 +200 net migration

Table 10: Projected housing needs table by accommodation type, +200 net migration

	2025	2030	2035	2040
Projected households	46,680	47,400	47,790	47,820
Change in households	0	720	1,110	1,140
Change in qualified accommodation since 2025				
Flat 1-bed	0	230	360	370
Flat 2-bed	0	60	140	150
Flat 3+ bed	0	10	20	30
House 1-bed	0	30	50	70
House 2-bed	0	110	200	260
House 3-bed	0	170	360	480
House 4-bed	0	30	60	60
House 5+ bed	0	30	40	40
Total	0	660	1,240	1,450
Change in non-qualified accommodation since 2025				
Flat 1-bed	0	50	-60	-170
Flat 2-bed	0	-10	-60	-90
Flat 3+ bed	0	0	-10	-20
House 1-bed	0	0	0	-10
House 2-bed	0	10	0	-10
House 3-bed	0	10	0	-10
House 4-bed	0	0	0	0
House 5+ bed	0	0	0	0
Total	0	60	-140	-310

5.2 +400 net migration

Table 11: Projected housing needs table by accommodation type, +400 net migration

	2025	2030	2035	2040
Projected households	46,780	48,000	48,890	49,430
Change in households	0	1,210	2,110	2,650
Change in qualified accommodation since 2025				
Flat 1-bed	0	260	430	500
Flat 2-bed	0	90	210	290
Flat 3+ bed	0	10	30	50
House 1-bed	0	30	60	80
House 2-bed	0	120	230	320
House 3-bed	0	200	460	680
House 4-bed	0	50	110	160
House 5+ bed	0	30	60	80
Total	0	790	1,600	2,160
Change in non-qualified accommodation since 2025				
Flat 1-bed	0	290	350	340
Flat 2-bed	0	50	50	40
Flat 3+ bed	0	10	10	10
House 1-bed	0	10	20	20
House 2-bed	0	20	30	30
House 3-bed	0	30	30	40
House 4-bed	0	10	10	10
House 5+ bed	0	0	0	0
Total	0	430	500	490

5.3 +600 net migration

Table 12: Projected housing needs table by accommodation type, +600 net migration

	2025	2030	2035	2040
Projected households	46,880	48,590	49,990	51,030
Change in households	0	1,710	3,110	4,150
Change in qualified accommodation since 2025				
Flat 1-bed	0	280	500	640
Flat 2-bed	0	110	280	420
Flat 3+ bed	0	20	40	70
House 1-bed	0	30	60	90
House 2-bed	0	130	260	380
House 3-bed	0	240	570	890
House 4-bed	0	60	160	260
House 5+ bed	0	40	80	110
Total	0	920	1,960	2,860
Change in non-qualified accommodation since 2025				
Flat 1-bed	0	530	750	850
Flat 2-bed	0	110	150	170
Flat 3+ bed	0	30	40	40
House 1-bed	0	30	40	40
House 2-bed	0	40	60	70
House 3-bed	0	50	70	80
House 4-bed	0	10	20	30
House 5+ bed	0	0	10	10
Total	0	790	1,140	1,290

5.4 +800 net migration

Table 13: Projected housing needs table by accommodation type, +800 net migration

	2025	2030	2035	2040
Projected households	46,980	49,190	51,090	52,630
Change in households	0	2,210	4,110	5,650
Change in qualified accommodation since 2025				
Flat 1-bed	0	310	570	780
Flat 2-bed	0	140	350	560
Flat 3+ bed	0	20	50	90
House 1-bed	0	30	70	100
House 2-bed	0	140	290	440
House 3-bed	0	280	670	1,090
House 4-bed	0	80	220	360
House 5+ bed	0	40	100	150
Total	0	1,050	2,320	3,570
Change in non-qualified accommodation since 2025				
Flat 1-bed	0	760	1,160	1,360
Flat 2-bed	0	170	260	300
Flat 3+ bed	0	40	60	70
House 1-bed	0	40	60	70
House 2-bed	0	60	90	110
House 3-bed	0	60	100	130
House 4-bed	0	20	30	40
House 5+ bed	0	10	10	10
Total	0	1,160	1,780	2,090