

Imagine Jersey 2035

Preparing for the future

Report of consultation findings by
Involve for the States of Jersey

February 2008

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Executive Summary

This document contains the results of the Imagine Jersey 2035 consultation process. The aims of the consultation were to enable the public to understand the social and economic challenges associated with Jersey's ageing population and to inform the States of Jersey's decisions about how these challenges should be met in the future.

Imagine Jersey 2035 ran from November 2007 to February 2008 and consisted of a survey, a traditional written consultation and a deliberative public conference. The process was delivered by Involve in collaboration with the States of Jersey.

Protecting the environment and Jersey's unique way of life

The consultation revealed strong feelings among Jersey's citizens about the changes taking place in the Island and the measures put forward by the States of Jersey to meet the challenges of the ageing society.

Participants in the conference and respondents to the survey and written consultation were concerned that increased inward migration or new housing developments may threaten Jersey's unique countryside, environment and way of life. There were particularly strong oppositions to any developments that would involve new buildings on greenfield land.

Nevertheless, the overriding message from the consultation was one of reluctant acceptance that some difficult adjustments will be necessary in the future to address the decline in the working age population. Summaries of the citizens' response to the options proposed by the States are listed below.

Growing the economy

There was broad support in both the survey and the conference for growing the economy. At the public conference, over two thirds (70%) of public participants were in favour of growing the economy as a solution to the economic and social challenges facing Jersey. In the survey, this was by far the most popular of the four options presented by the States of Jersey¹.

Some participants voiced concerns about the environmental effects of increased growth. Others questioned whether relying on high value industries would lead to a growth in social inequalities or make Jersey vulnerable to global economic crises.

Suggestions put forward by participants in relation to economic growth included calls for public service reform to increase efficiency, better support for working parents and more support for entrepreneurs and home-grown industry.

Working longer

Overall, there was broad support for the proposals relating to raising the States pension age among conference participants and the respondents to the survey and written consultation. Three quarters (75%) of conference participants were in favour of working longer as part of the solution to the

¹ The four options were: "growing the economy", "working longer", "the resident population pays more", and "allowing more people to live and work in Jersey".

economic challenges ahead. In the survey, working longer was the second most popular of the four options presented by the States.

The most recent estimate of the average age at which people actually retire from employment in Jersey is 58. When asked what people thought would be an acceptable average age of retirement by 2035, only 5% of voters in the conference wanted the average retirement age to remain the same or be lower. Over three quarters (77%) were willing to accept an average retirement age of 64 or more.

There was widespread agreement that flexibility of working conditions and pension age are key to encouraging people to work for longer. There was strong opposition to reducing the value of the States pension.

Some participants raised concerns about the health implications of working longer and the impact it would have on the voluntary sector. Suggestions put forward by participants included more retraining opportunities for older workers, incentives to encourage people to work longer and legislation to combat age discrimination.

The resident population pays more

There were mixed feelings among participants about the proposals to increase taxes and contributions to maintain current levels of public services. The submissions to the written consultation revealed a level of support for paying more, although some respondents stated that they would only support this if the finance industry would not be adversely affected, or only if the States of Jersey did more to control spending.

The survey and the initial conference votes indicated a strong opposition to any increase in taxes and contributions. However, when asked how much *more* people were prepared to pay, few participants maintained this position. In fact, when asked to come up with their own answers to the predicted budget deficit in 2035, all of the citizen groups choose to include an increase in taxes and contributions as part of their solution.

This may mean that whilst people do not actively support increases in taxes and contributions, many are willing to accept some level of increase in order to sustain public services.

Concerns raised in response to this option related to how tax increases would affect the cost of living, in particular for those less well off, and how it would affect Jersey's attractiveness to overseas businesses.

Suggestions put forward included paying directly for some services, introducing social insurance schemes and raising the taxes for businesses and high earners.

Allowing more people to live in Jersey

Inward migration was the most contentious issue raised in the consultation. In both the survey and the conference it was by far the most unpopular of the four options presented by the States of Jersey. It was also the issue that most divided the participants in all three parts of the consultation. Whilst some people accepted a need for more people to boost the workforce, others were fiercely against inward migration under any circumstances.

However, as people discussed and weighted the different options in the public event, many arrived at a reluctant acceptance that controlled inward migration may be necessary in the future. At the end of the conference, 19 of 20 citizen groups agreed that some level of inward migration would be a necessary part of the solution to the economic and social challenges ahead.

The concerns raised in response to the inward migration option focused on the impact that migration would have on the character of Jersey's society, culture and countryside, and how it would affect the environment.

Housing needs in the future

The States of Jersey made clear that more housing is likely to be needed in the future whether or not more inward migration takes place, as more people will be living alone. All three parts of the consultation revealed strong sentiments among participants in response to the proposals for new housing. Two clear messages emerged: firstly, that the public participants were strongly opposed to any new building on greenfield land, and secondly, that many were willing to accept new housing developments in St Helier and to a lesser extent elsewhere, provided that these were of good quality and affordable to ordinary citizens.

Exploring more creative solutions to future housing needs, such as moving the port or reclaiming new land, also received support from the participants. Over two thirds (68%) of voters in the conference were in favour of looking into such options. In the survey, too, people expressed an interest in exploring alternative options for housing: 457 respondents gave their own suggestions for how Jersey could meet its future housing needs.

Suggestions put forward in the survey, written consultation and at the event included calls for unused office spaces to be turned into housing, measures to make St. Helier a more attractive place to live, and incentives to encourage retired people and people without children to move into smaller accommodation in order to free up larger homes for families.

Other suggestions and ideas

In addition to discussing and commenting on these options, the participants of the survey, event and written consultation proposed their own solutions to the challenges facing Jersey. These suggestions have been presented to the States of Jersey in and alongside² this report.

Among the issues raised were a sense among some participants that the Imagine Jersey 2035 consultation process was skewed by an assumption that people would maintain today's habits and levels of consumption in the future. It was argued that many of the predicted challenges facing Jersey could be addressed by changing the way people live and how the Island's resources are used.

Others called for more emphasis on creating diverse training, education and employment opportunities in Jersey, to make the Island more attractive to young people and to make it easier for older people to find suitable employment and thus work for longer.

² For reasons of space not all survey responses have been included in this report. A full list of responses have been presented to the States of Jersey as a separate document.

1. Introduction

The purpose of this report is to present the results from the Imagine Jersey 2035 process.

Process and aims

The aims of Imagine Jersey 2035 were:

- To enable the public to understand how Jersey's society is changing and to encourage debate about the kind of Island community Jersey wants for the future.
- To inform the decisions of the States of Jersey by giving an indication of people's preferences towards the options and the boundaries within which the states should operate in putting policies in place to manage these changes in the future.

In order to achieve this goal Involve and the States of Jersey developed a multi-levelled consultation approach which involved:

- **A consultation guide**, containing an explanation of the issues and options surrounding the ageing population that was published in November 2007.
- **A traditional written consultation** on the issues presented in the consultation guide, which ran between 20 November 2007 and 8 February 2008.
- **An online survey**, exploring the Jersey public's values and aspirations for the future, which ran between 26 November and 31 December 2007.
- **A deliberative public conference** to explore the issues surrounding the ageing society, which was held on 19 January 2008.
- **A citizen stakeholder group**, representing different parts of Jersey's society, to help shape and comment on the survey and event. This was to ensure that the process would take into account the perspectives of different citizen groups, so that those taking part in the consultation would have the best possible chance of having a meaningful input.
- **Training of States of Jersey staff by Involve**, to build capacity within the States for future public participation activities.

The consultation guide and survey were available electronically from the States of Jersey website: www.gov.je. Paper copies were made available at Parish Halls, the States Bookshop, the Customer Service Centre at Cyril Le Marquand House in St Helier, the Public Library, Maritime House, Jersey Airport, Communicare in St Brelade, St Peter's Community Centre, Jersey's secondary schools and the General Hospital.

Who took part?

Over 1,300 citizens participated in total: 1257 in the survey and 136 in the event. In addition, 35 responses to the written consultation were received, some of which were submitted by individuals and some by groups. All participants were self-selected.

Understanding the findings

The event was designed to build partly on the information derived from the survey and the survey data directly informed the citizens' deliberations at the event. The traditional written consultation ran in parallel, as a separate opportunity for members of the public to submit a response to the Imagine Jersey 2035 consultation document without being limited to the questions posed in the survey and at the event.

Each element of the process delivered a different type of output, and it is important to understand the difference between them. The survey results are traditional public opinion data, which has been weighted to reflect the opinions held by a representative section of Jersey's citizens. The event data, on the other hand, does not derive from a representative sample of the Jersey public, as participants were self-selected and the data has not been weighted. However, the event findings have been arrived at through a unique process of deliberation and learning. Those who attended the event took part in a full day of information, reflection, discussion and voting before reaching their final conclusions. Hence it is helpful to consider the survey data as approximately representative of opinion at large, and the event data as more informed, but not necessarily representative of opinion at large as the opinions were gathered through a very unique process of information and discussion.

This report summarises the findings from each aspects of the consultation process. Chapter 1 contains the results of the public conference, Chapter 2 contains the findings from the survey and Chapter 3 contains a summary of the written responses.

2. Summary of Conference Findings

This chapter summarises the findings from the Imagine Jersey 2035 Public Conference, held at the Royal Yacht Hotel in St Helier on 19 January 2008. For each session of the day we present a brief overview analysis covering the results of the votes, a summary of the facilitators' notes and the results of the tradeoff game.

Imagine Jersey 2035 public conference – at a glance

When and where?

19 January 2008 at the Royal Yacht Hotel, St Helier.

Why was the conference held?

- To build an understanding of the tradeoffs surrounding the ageing society amongst the Jersey public
- To inform the decisions of the States of Jersey by giving an indication of people's preferences towards the options and the boundaries within which the states should operate in putting policies in place to manage these changes in the future.

Who took part?

The conference was open to the general public and was advertised through the media. 136 public participants attended, alongside 41 States of Jersey staff and approximately 34 States Members who attended as observers.

What happened?

The conference was a one-day deliberative event delivered by Involve with the support of facilitators from the States of Jersey. The event revolved around small-group discussions. Each session focused on a different theme that had been identified by the States of Jersey, with the support of the stakeholder group and outlined in the Imagine Jersey 2035 consultation document. Each discussion topic outlined a different option for meeting the challenges of the ageing population. The topics covered were:

- Growing the economy
- Working longer
- The resident population pays more
- Allowing more people to live in Jersey.

At the end of the day a tradeoff game was used which allowed participants to come up with their own combination of solutions to the economic and social challenges facing Jersey.

2.1 Event components

2.1.1 Table discussions and electronic voting

Participants sat around tables of between 4 – 8 citizens, facilitated by a States of Jersey employee who had received facilitation training by Involve. Each participant had an electronic voting pad with which they gave their demographic details at the beginning of the day.

Each table discussion was preceded by a presentation from a States official. The discussions lasted for 20 minutes. The facilitators recorded areas of agreement, disagreement and other ideas that the participants put forward. These notes were typed up after the event and presented to Involve for analysis. Summaries of the notes can be found under the appropriate sections later in this chapter.

At the end of the discussions each participant used their electronic voting pad to vote on pre-agreed questions. Where requested by the participants the wording of the questions were clarified or changed. Participants could abstain from voting if they did not agree with a question.

At the start of the event the participants were asked to vote on a set of baseline questions which were repeated at the end of the day. The comparison of the answers at the start and end of the day to these baseline questions allows us to see how and where the views and attitudes of the participants changed and stayed the same as a result of going through the day.

States officials, states members and other observers were not allowed to vote and were asked not to contribute to discussions unless asked by public participants to do so.

2.1.2 The tradeoff game

An important part of the process was the tradeoff game in the last session of the day. The purpose of the tradeoff game was to support a creative discussion around the compromises that will need to be made in the future as Jersey addresses the economic and social challenges of an ageing population.

Each table group was asked to come up with a solution to the projected annual deficit of £140 million in the States of Jersey budget by 2035. The participants were given cards with different policy options, each stating how much money it would generate/save. The information was based on the best available evidence from the research commissioned by the States.

The tradeoff game was distinct from the voting which preceded it in that it was a group rather than an individual activity and that it allowed the participants to look at all options as parts of a complete solution rather than in isolation. Additional options could be added by participants if they felt that particular options were missing from the game.

The game boards for each table were photographed and the results were later transferred to a table, which is available in Appendix 2 to this report. The tradeoff game results are discussed in each section.

2.2 Demographic profile of attendees

Total number of participants: 136

Sex: male 54%
female 46%

Age: 65+ 23%
55-64 26%
45-54 23%
35-44 8%
25-34 9%
19-24 3%
0-18 8%

Place of birth

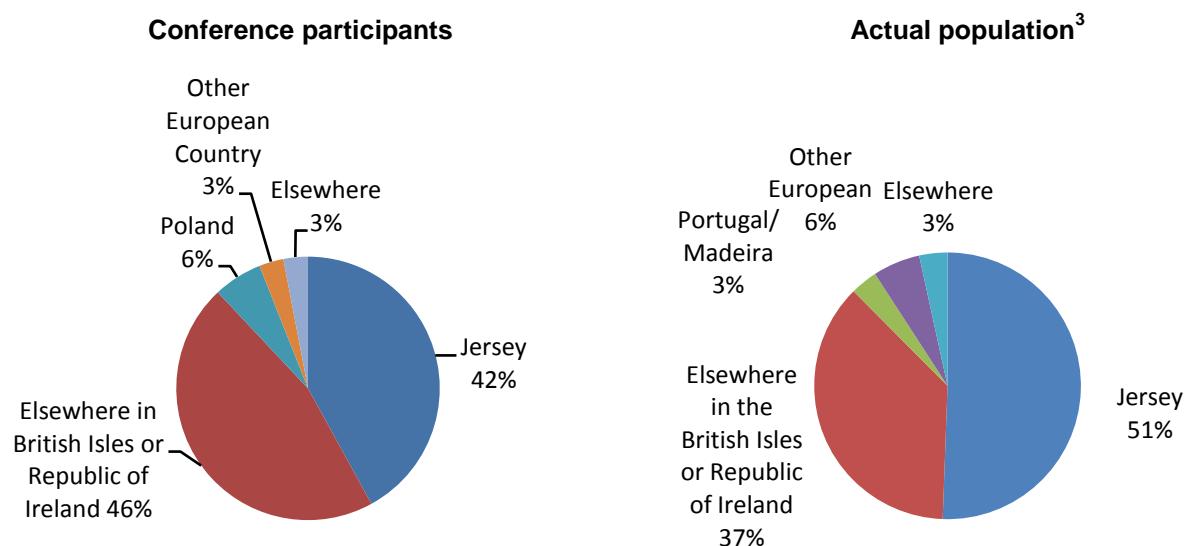


Figure 1

³ Jersey Annual Social Survey 2007

Occupation

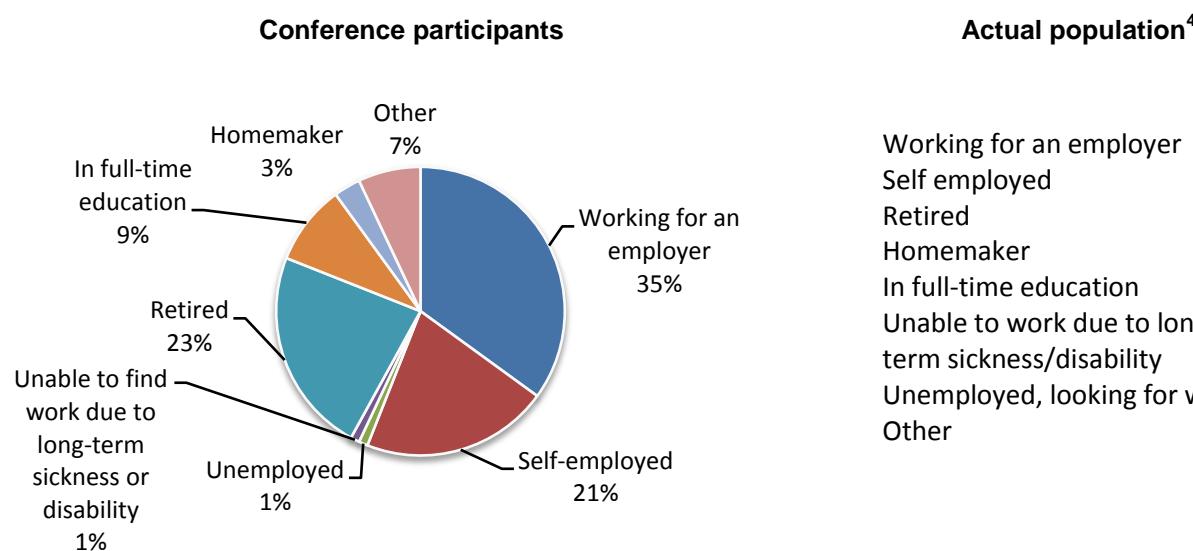


Figure 2

Parish

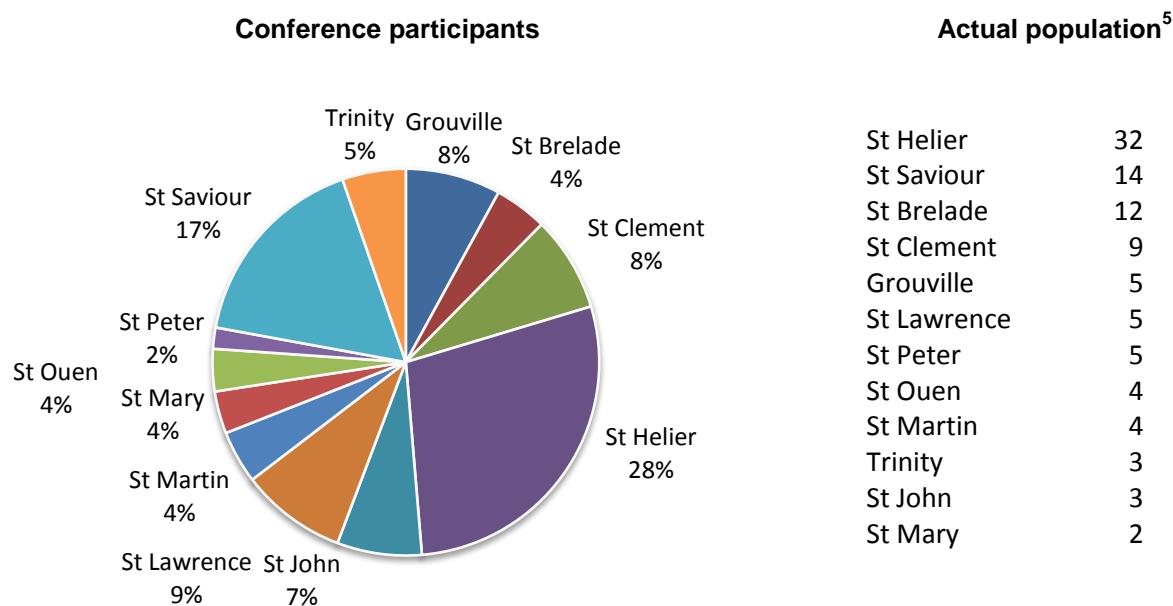


Figure 3

⁴ Jersey Annual Social Survey 2007

⁵ 2001 Census

2.3 Topics discussed

2.3.1 Growing the economy

Summary of this option

Why economic growth? The more productive Jersey's economy becomes, the bigger the profits for individual businesses and the higher the wages. The more that is earned by businesses and individuals, the more tax income is created for government to fund its services.

What would it mean in practice? The States presented three options for growing the economy in the future:

- *Make the economy more productive.* Economic growth could be achieved by improved productivity of employees in all industries. This would involve using resources of land and labour more efficiently. If the Island could sustain a 1% increase in productivity each year, it would reduce the financial shortfall by about £45m a year.
- *Transfer people into higher value jobs.* This is another way of increasing productivity and could increase the amount of tax raised, thereby reducing the deficit. This could be achieved by: moving more people into the Financial Services Industry from other sectors or by new sectors of the economy expanding, which deliver similar, higher levels of tax per worker to that of the finance industry.
- *Encourage more people of working age to join the workforce.* This would require policies encouraging those in part time employment to consider working full time; persuading those taking early retirement to stay at work and persuading those currently at home to consider full or part time work. This would make only a limited contribution because Jersey already has a high rate of participation.

Voting outcomes

Overall, there was broad support for the proposals relating to economic growth. When asked about growing the economy as a solution to the economic and social challenges facing Jersey, over two thirds (70%) of public participants were in favour or strongly in favour. 8% were against and 6% were strongly against (see Figure 4, page 13)

Nearly one-sixth (16%) were neither in favour nor against. Some table facilitators noted that some participants did not vote as they felt that the question was too simplified to give an answer. It was argued that people could not say whether they were in favour of growth or not when the nature of the growth and what impacts it would have (e.g. on the environment) were not specified.

Which of these statements best describe how you feel about growing the economy as a solution to the economic and social challenges ahead?

(numbers shown are percentages of all participants who voted on this question)

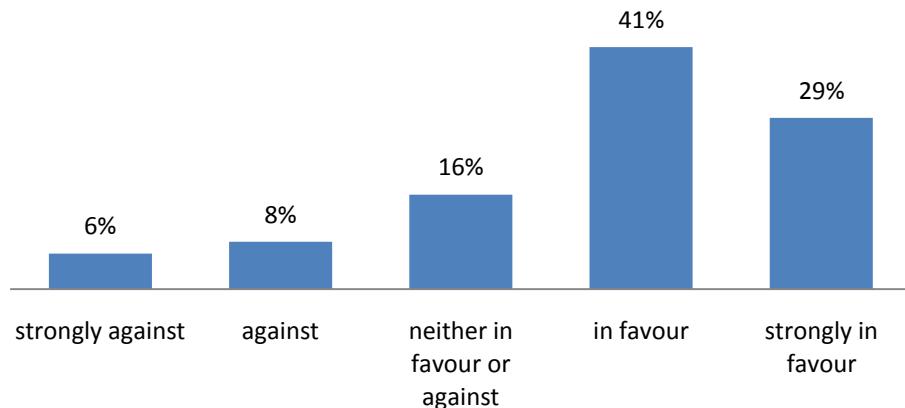


Figure 4

When asked what they thought about the three different proposals for growing the economy, the participants responded as follows:

The States should prioritise making the economy more effective

(numbers shown are percentages of all participants who voted on this question)

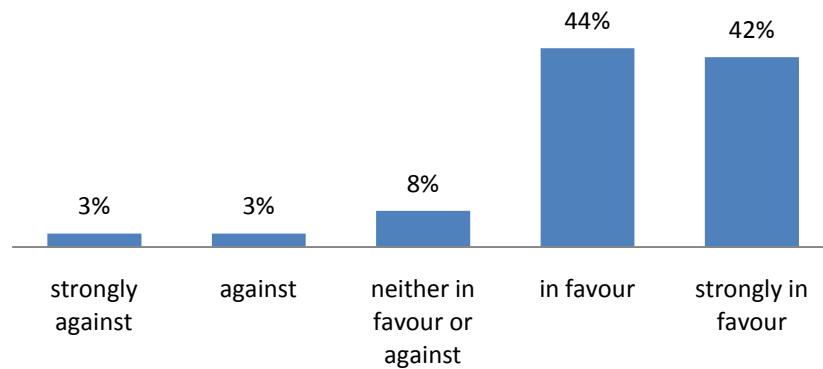


Figure 5

The States should grow and diversify the economy through more high-value industries

(numbers shown are percentages of all participants who voted on this question)

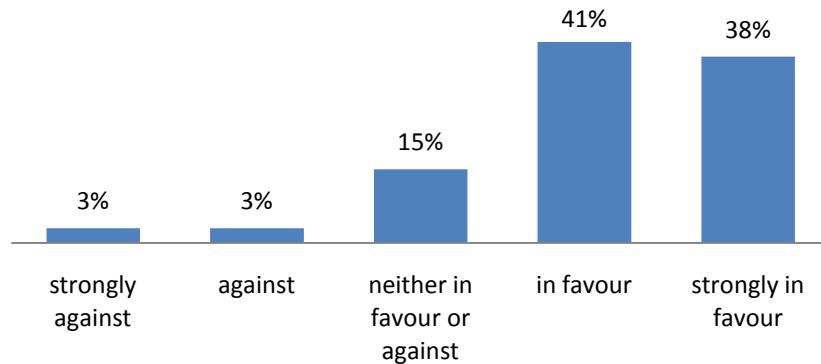


Figure 6

The high value industry proposal was particularly popular with those aged 19 - 24 and 25 - 35. No participants from these age groups voted against or strongly against this option.

The States should encourage more people of working age to join the workforce
 (numbers shown are percentages of all participants who voted on this question)

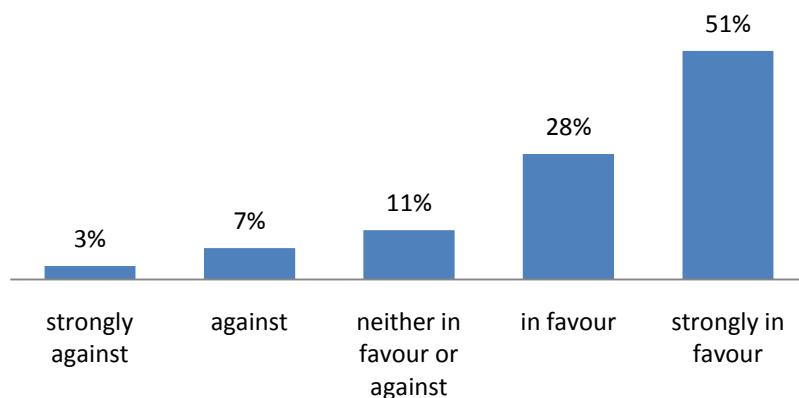


Figure 7

Interestingly, two thirds (67%) of homemakers were in favour or strongly in favour or more people of working age joining the workforce. One third of this group (33%) voted against this option. All participants aged 35 to 44 voted in favour or strongly in favour.

Tradeoff game results

Participants could choose three options for boosting the economy in the tradeoff game:

- The first option was to increase worker productivity by 1% per annum, which would generate £45m in States revenue.
- The second option was to increase the share of high-value industry. Here, each 1% of the workforce moving into high value industries represented £5m in States revenue. The maximum increase in high value industry allowed was 5% of the workforce, or £25m).
- Finally, participants could choose to bring more non-working residents into the workforce. 1,000 more people represented £5m, with the maximum number of workers allowed being 3,000.

Here, too, there was widespread support among the participants for economic growth as part of the solution to the predicted budget deficit. Every table chose the option to increase worker productivity by 1% per annum in order to generate £45 million in States revenue by 2035.

There was less support for the proposal to increase the share of employment in high value industries. Six out of twenty tables chose not to include this option in their preferred solution. The distribution of options was as follows:

- 0% increase in high value industries – 6 tables
- 1% increase in high value industries – 3 tables
- 2% increase in high value industries – 5 tables
- 3% increase in high value industries – 4 tables
- 4% increase in high value industries – 1 table
- 5% increase in high value industries – 1 table

All tables bar two chose to increase the existing workforce by encouraging current non-workers or part-time workers to work full time. The distribution was as follows:

- Move no non-workers into employment – 2 tables
- Move 1,000 non-workers into employment – 11 tables
- Move 2,000 non-workers into employment – 5 tables
- Move 3,000 non-workers into employment – 2 tables

Table discussions

There were lively discussions in this session. Table facilitators logged a number of questions and concerns from the public participants, as well as ideas and suggestions for how the States to consider. Many points recurred in more than one discussion and these have been summarised below.

Questions and concerns

Social and environmental consequences

The most frequently recurring topic logged by the table facilitator surrounded the social and environmental consequences of economic growth. Potential consequences mentioned by participants included:

- Increased pressure on families, with working parents being forced to work longer hours or stay-at-home parents being pressured into going to work.
- Environmental consequences of growth, including pressure related to new buildings as more people and businesses would have to be housed.
- Loss of small businesses and shops, leading to a change in the character of the Island, making it into “a big business centre” or “a new Hong Kong”.
- Growth in social inequalities, with the gap between those in high value employment and those in traditional service industries widening
- House prices continuing to grow, making buying a house difficult for people on low incomes.
- Cost of living being pushed up by those working in the high value industries.

Validity and credibility of the predictions

Some participants questioned the data on which the States’ predictions were based, and asked whether it is realistic to expect the economy to continue to grow. In particular there were concerns that the workforce is already stretched and that aiming for higher productivity may lead to higher incidents of stress-related problems such as drinking. It was also argued that as Jersey already has high rates of participation it would be unrealistic to expect as many as 2,000 more people to work full time.

The danger of relying on the finance sector

Some tables raised the concern that relying on a finance-centred economy may carry risks. It was argued that:

- Job opportunities being restricted to the finance industry may discourage Jersey-born people from staying in or returning to Jersey. In particular there were concerns that focusing on a finance-centred economy would reinforce the sense among some young people that Jersey does not cater to their diverse ambitions.
- The finance sector is closely linked to the global economy and therefore to factors and risks beyond the Island’s control. This makes Jersey vulnerable; if there were a global recession it may be hit harder than larger and more diversified economies.

- Focusing on high-value industries may be at the cost of retaining local businesses, local service industry and skilled tradespeople; i.e. so called ‘lower value’ areas of employment which still have a high social and cultural value to the Island.

Suggestions and ideas

Many tables had their own ideas of how the economy could be boosted in future. The most popular suggestions included prioritising education and training to encourage young people to stay in Jersey, providing more support to working parents, encouraging entrepreneurship and home-grown industry, diversifying the economy and reforming the public service.

Retaining and training

Many participants felt that one way of boosting the workforce and productivity in the future would be to prioritise training and retaining of people who already live in Jersey. In particular there was a focus on young people who may otherwise be tempted to leave the Island for more diverse educational and employment opportunities offered elsewhere. Suggestions included:

- Tailor higher education provision to the economy to help workers move into high-yield jobs.
- Make more vocational and practically-focused courses available to students, e.g. IT or engineering.
- Use excess school facilities to retrain adults, in particular those not currently contributing to the economy.
- Provide more support to graduates post graduation.
- Encourage pensioners to teach skills to youngsters (e.g. through Highlands College).
- Encourage J-cats to train local successors to prevent all top level jobs going to UK people.

Support parents and families

The need for childcare policies to encourage parents back to work was discussed on several tables. Many participants argued that providing childcare subsidies or tax incentives to working parents would help boost the workforce and make for a more egalitarian society. Among the comments noted by table facilitators were:

- Increasing the size of the workforce without migration will require additional support mechanisms, particularly for working mothers.
- People need to be incentivised to go back to work and not providing free nursery care is actively discouraging young Mums from going back to work. ‘Family friendly’ firms should be encouraged.
- A referendum on childcare provision is needed.
- Allow flexible policies to encourage part-time employment or home working, in particular for non-workers, parents and retired people.

Some participants did not feel that encouraging parents back to work when the children are still small was a sensible option. As one facilitator noted: “[it was felt that] parents should be encouraged to stay at home during child-age years for the benefit of good parenting. However, smarter working practices should be introduced to encourage people to return to work.”

Encourage entrepreneurship and home-grown industry

Many participants argued that the States should do more to encourage entrepreneurship among residents and Jersey business. It was felt by some that there are too many government-imposed restrictions in the way for those seeking to start or grow their own business. Comments noted by the table facilitators included:

- There is too much red tape in Jersey, it stifles diversification and productivity. An example is the difficulty in getting a regulation of undertakings licence to grow a business.
- Jersey should adopt a “light touch” approach to encourage entrepreneurship.
- Encourage and support Jersey companies rather than look elsewhere for services. Those buying a product or service should always ask whether it can be provided locally before commissioning somebody from the UK to supply it.
- Promote the “Jersey brand” by supporting local industry and products.

Diversify the economy

Related to the calls for more support for local entrepreneurs were suggestions made on some tables that Jersey should seek to diversify its economy rather than focus all its energy on building the finance industry. Some participants proposed specific industries they felt the States should explore, including:

- Encourage tourism – more emphasis on conferencing and sport/short breaks
- Explore online technology (e.g. e-commerce)
- Grow productivity with casinos and IT businesses
- Increase the export of potatoes
- Encourage new business ideas, e.g. producing vodka

Reform the public sector

A recurring theme throughout the day was that some participants felt that public services could be made more efficient, which, they argued, would lessen the effects of the predicted budget deficit for 2035. There was a sense among some participants that civil servants are overpaid and that public services should be cut. Others did not agree with this, feeling that public service wages needed to be competitive and/or that further cuts in public services were not desirable. When participants were asked later in the day how they felt about reducing public services, 55% voted against or strongly against (see figure 14, page 27).

The points listed below are some of the suggestions made by participants for how the public service could be made more efficient:

- Be flexible with States budgets so that they can either carry over a surplus or move it between departments – this way the cash can go where it’s needed rather than disappearing just before the end of the financial year in a flurry of spendthrift profligacy.
- States should run like a business and not give disproportionate benefits to employees.
- Services that could be outsourced should be.
- Reduce senior and/or middle management but not frontline staff.
- The States should share resources with the other Channel Islands to avoid the duplication of services.
- The States budget should be managed like a household budget, i.e. take a loan in order to do something that saves money. For example, some States housing is badly insulated, leading to high electricity bills. If the States were to take a loan to insulate those houses they would save money in the long run.

Live differently

Some participants felt that the discussions on the day were skewed by an assumption that people would maintain today's habits and consumption levels in the future. It was argued by some that many of the predicted challenges for Jersey's society and economy in the future could be addressed by changing the way people live and how the Island's resources are used. These are some of the thoughts recorded by the table facilitators:

- Some felt that we needed to live within our means. "How did we manage until 1960" was discussed and some felt that we are just too greedy now and as a result too ambitious for what Jersey should be like.
- Being poorer is an option.
- There is insufficient harnessing of renewable energy in the Island.

See also section 2.4: Other Suggestions on the Day, on pages 47-48.

Questions for further research

Some tables raised questions that could not be answered on the day. The following two points were recorded by table facilitators:

- What about the 'hidden' value of all the volunteer workers? If we lose their input there are huge consequences on our society – on Jersey. Why don't we know what their input is? Can't we use today to ask everyone in the room how many hours a week they do voluntary work and multiply that by the minimum wage?
- Jersey needs a census to obtain accurate information about the population.

2.3.2 Working longer

Summary of this option

Many other countries are taking steps to extend people's working lives and increase the statutory retirement age. As people live longer and stay healthier longer, it could be appropriate for Jersey to delay retirement so that people can continue to work and pay tax for longer. Increasing the States pension age by five years would reduce government expenditure by £50m a year by 2035.

Voting results

Overall, there was broad support for the proposals relating to raising the States pension age. Three quarters (75%) of the public participants were in favour or strongly in favour of working longer as part of the solution to the economic challenges ahead. 10% of participants were against and 7% were strongly against. 8% were neither in favour or against (figure 8, below).

The option of working longer was more popular amongst the retired and homemakers and less popular amongst students, the unemployed and those unable to work. Those born outside of Jersey were more supportive of this option than those born in Jersey. Two thirds (67%) of those aged 19 - 24 voted against this proposal whereas older age groups were generally more in favour.

There was strong opposition to reducing the value of the States pension: over three quarters (76%) of respondents voted against or strongly against this option (figure 9, page 20). This was reflected also in table discussions.

Which of these statements best describe how you feel about working for longer as part of the solution to the economic challenges ahead?

(numbers shown are percentages of all participants who voted on this question)

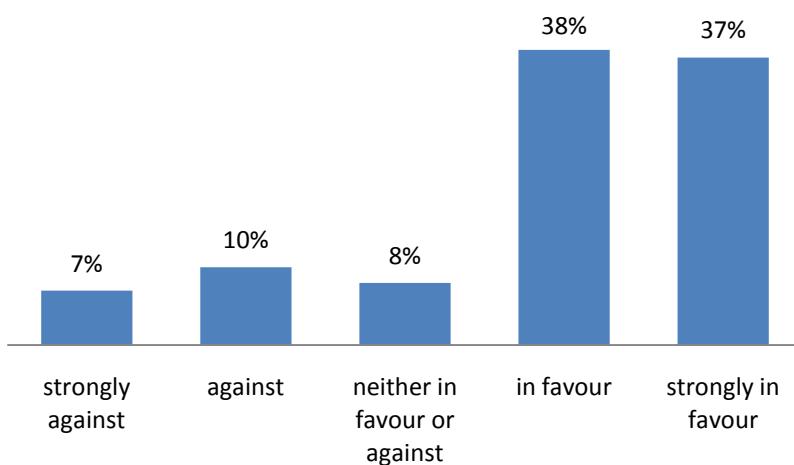


Figure 8

Which of these statements best describe how you feel about reducing the value of the States pension (i.e. the amount of money pensioners receive each week)?
 (numbers shown are percentages of all participants who voted on this question)

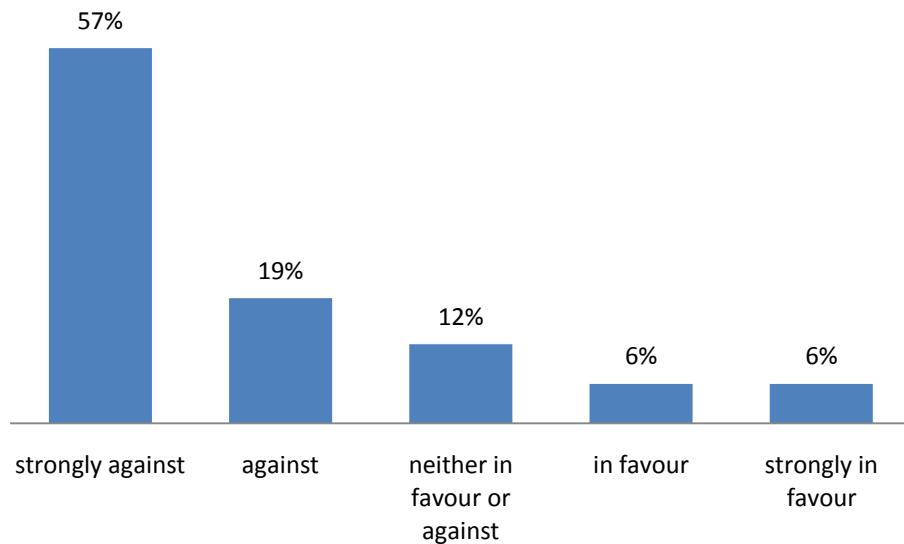


Figure 9

When asked to consider two further proposals for pension reform, the participants responded as follows:

The most recent estimate of the average age at which people actually retire from employment in Jersey is 58. What do you think would be an acceptable average age of retirement from employment by 2035?

(numbers shown are percentages of all participants who voted on this question)

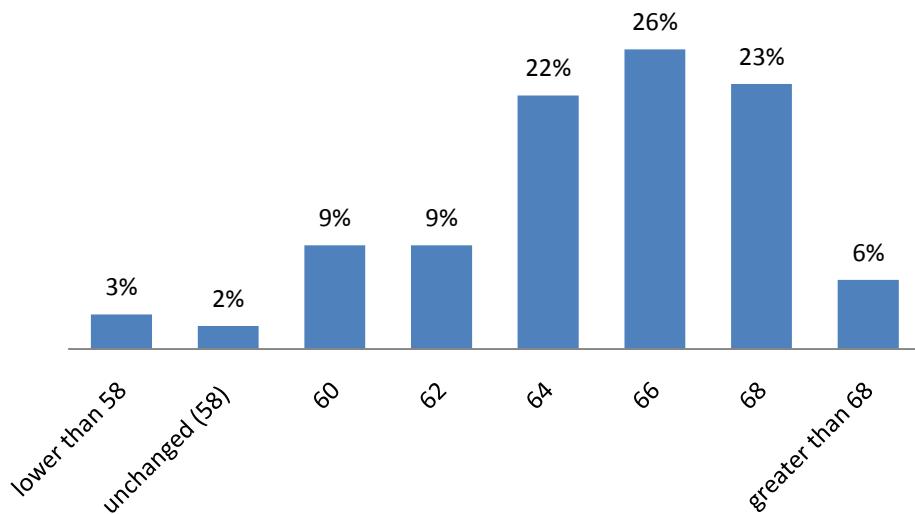


Figure 10

Women generally voted for a lower retirement age than men. 7% of women voted for lower than 58, whilst none of the men chose this option. Meanwhile, 10% of men voted for older than 68, compared with 0% of women.

If the States pension age was to increase, how many years would you consider acceptable?
 (numbers shown are percentages of all participants who voted on this question)

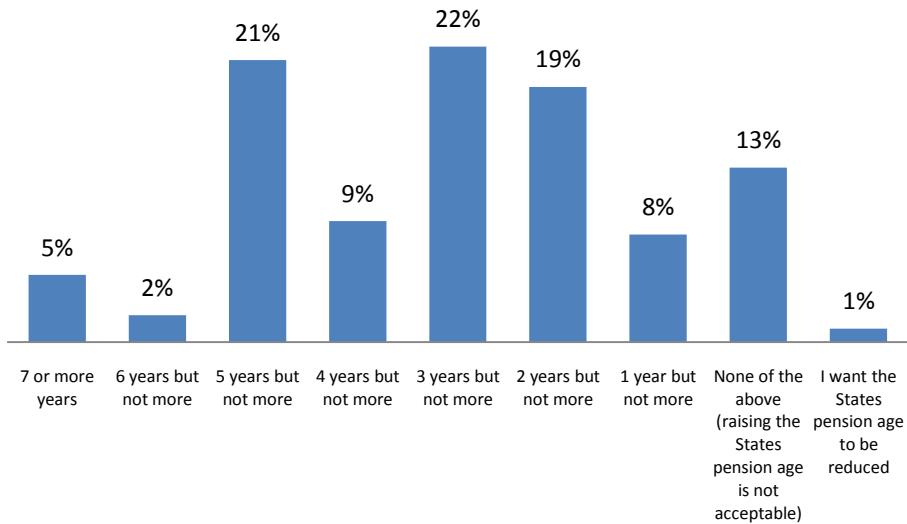


Figure 11

There was some confusion in this section with regards to the wording of the questions that participants were asked to vote on. Some participants felt that it was unclear whether the questions referred to States pension age or the age at which people actually retire (which may be different). Some also felt unsure about whether they were supposed to vote on what they felt would be an acceptable average age of retirement in Jersey, or the age at which they themselves would be prepared to retire. Others objected because they felt the questions were too simplistic – for example they did not distinguish between manual workers and office workers. The facilitators and States officials did their best to clarify these uncertainties, but table facilitators nonetheless logged that some people did not vote as they felt the questions were unclear.

Tradeoff game results

In the tradeoff game participants were given the option to increase the States pension age by any number up to 8 years, or to leave it at the current level (65 years). Each year added to the States pension age in the game represented a £10m saving.

All tables chose to increase the States pension age. The most popular option was to increase it by three years: eight tables went for this option. The distribution of options was as follows:

- 1 year increase – 1 table
- 2 years increase – 5 tables
- 3 years increase – 8 tables
- 4 years increase – 3 tables
- 5 years increase – 3 tables

It is notable that the tradeoff game results show a lower average support for pension age increases than the individual voting did. This could be interpreted as a declining support for the option when people deliberated amongst themselves and needed to consider the views and needs of others. It could also mean that people's preferences changed when they weighted the options against each other and saw that the budget deficit could be addressed in other ways.

Table discussions

Questions and concerns

A number of questions and concerns were raised in response to the working longer proposals. Many of these related to the health and productivity of older people, concerns about the inflexibility of a compulsory retirement age and concerns about the potential impact on the voluntary sector if people remain in employment for longer.

Health and productivity

Some participants raised concerns about the potential implications for health and productivity when people work later in life. These were some of the issues noted by table facilitators:

- The table felt that it should be acknowledged that working longer is not always a good idea. It is important to assess the ability vs. the enthusiasm. A 45 year old can know "everything" and be at the peak of their career and be very capable. That same person at 65 may be just as enthusiastic but have lost their productivity.
- It was agreed that we should allow people to carry on working, but they mustn't expect to earn what they did and can't necessarily do the same job. The table agreed that this was not just in obvious cases such as manual work, but also office based roles/high level management finance roles.
- Considering all the health issues faced by older people, will people over the current age of retirement be able to work longer?

Compulsory retirement

Many participants were against the notion of a compulsory retirement age. There were concerns that people would be forced to retire before they felt ready to, or that those who wanted to and could afford to retire early would be prevented from doing so. Choice and flexibility were seen as key to any reform of the pension system.

Impact on the voluntary sector

Some tables discussed the role of older people in the voluntary sector. It was felt by some that encouraging people to work for longer could undermine the good work carried out on a voluntary basis by retired people and would thus be a false economy in the long term. These are some of the thoughts recorded by the table facilitators on this subject:

- More should be done to acknowledge and recognise the value of 'unpaid' work– Jersey has a strong tradition of honorary and voluntary service which is sometimes overlooked and derided as being 'unprofessional'.
- If more retired people are encouraged back into the workforce will this affect the voluntary sector? Would we be shooting ourselves in the foot by taking them out volunteer work and into paid work?
- People now working as volunteers for charities, or caring for family members, will be out working for money and not available to do what they're currently doing.

Suggestions and ideas

A number of suggestions of how the States could support and encourage people to work for longer were made during the discussions. Topics raised included calls for flexible working, incentives for people who work longer, the need to stamp out ageism and more opportunities for retraining older workers, and encouraging people to supplement the States pension with private pension schemes.

Flexible working

As noted in the section on compulsory retirement, above, many participants felt that flexibility, both in retirement age and in working arrangements as people approach retirement, are key to encouraging people to retire later. Some felt that work-related stress made people more likely to want to stop working and therefore argued that allowing more flexibility such as part-time working or home working would enable those people to stay in employment for longer. Among the points recorded by table facilitators were:

- Work can be stressful and extending the pension age may require work to be structured for the needs of older workers, with more emphasis on part-time and less stressful work.
- There should be greater encouragement of working from home as a means of increasing flexibility and allowing people to work longer.
- When people retire there should be a phasing down of working hours. This will encourage people to work for longer and for their key skills to be retained and experiences passed on.
- More thought should be given to introducing more flexible, family orientated working patterns. Older people should be encouraged to work part-time, perhaps in less arduous or stressful roles, as they prepare and adjust for retirement at 66 or 67 years of age. It was felt that the current rigidity in these areas around restrictive occupational pensions (pension based on last full year of work) acted as real disincentives for some. There may well be a large untapped reservoir of people aged 58 and above who would be happy to work on part-time if their social security contributions were covered, their occupational pensions were not diluted and they could receive reasonable remuneration for the work undertaken. This could have real potential in underwriting and supporting some existing quasi voluntary community services that are likely to come under extreme pressure due to demographic pressures.
- When people get to pension age they could start to work part-time and gradually reduce their hours until they stop work completely. During that time they could hand over their experience and knowledge to younger employees. This taper time could also apply to the pension, so pension comes in gradually while a person is working, until full pension starts when that person stops working.
- The table thought that much more attention needed to be applied to learning more about the nature and composition of the workforce and that real incentives and increased flexibility should be built in to the work place to encourage longer working and a much more phased and managed process of retirement.
- There was some support and interest in flexible pension arrangements which would allow workers to choose between different levels of payment and different associated retirement ages.
- People should be able to take more junior jobs in later years without forfeiting their accumulated pension rights.
- There needs to be a date by which people have the right to retire but can continue if they wish.

Incentives

Many participants also felt that there should be incentives such as tax breaks or incremental increases in pension levels to encourage people to work for longer. Among the suggestions recorded were:

- There should be tax breaks for those who work longer.
- Incentives might be required to act as a carrot to encourage people. Say work to 68 and then get a higher level of pension.
- There should be tax breaks for retired people who start up new businesses.
- Strong opinion of the table was that there should be flexibility of age of retirement and hours worked, with work based incentives.

- Increase pension age incrementally over time to 68, coupled with policies for employees and employers to pay less tax if they work beyond retirement age.
- Companies could be encouraged to employ older people (who are often more expensive than younger people) by giving some kind of benefit/incentive for firms employing older staff.
- There should be tax incentives for people who work for longer. There should also be tax incentives for people who save for their future (i.e. no tax on savings or for the last 5 working years when for example annuities might mature) and who make provisions such as private health care.
- Companies could reserve a percentage of jobs for older people (B&Q do already).

Culture change

Several tables discussed how negative attitudes towards older workers limit people's opportunities for working longer. It was felt by many that older people are not valued in the current working culture and that their skills, experience and work ethic are therefore lost prematurely. These were some of the suggestions for what the States could do to change the situation:

- Descriptions of old age should be much more positive – it is not all about doom and gloom! Older people – third and fourth agers – have much to offer. They are experienced and often retain a wealth of knowledge and insight and should be respected more and kept involved and active within the community that they helped build.
- Stamp out ageism so older people can work for longer. Some people don't want to stop working completely as soon as they reach pension age.
- Carry out a PR campaign to promote older people in the workplace.
- The States need to change the employment laws to recognise older workers; they need to look at age discrimination.

Retraining

Participants also discussed the possibility of retraining people as they grow older. In particular there was support on some tables for offering training to people in manual work or other professions that may be too demanding for older people, to help them find employment elsewhere.

- Longer working would need to be underpinned by life-long learning and training for all. Retraining should be encouraged and offered – particularly in manual work.
- The States should encourage more organisations from the finance sector to retrain older adults.
- Front line staff, for example the Police, should not retire early, but rather be retrained and moved into back office roles.

Means tested pension

Whilst there was strong opposition to reducing the value of the States pension, some participants felt that there was a case for States pensions to be means tested. As one table facilitator noted: "it was agreed that everyone would need to receive a core base level, but it was felt that this was worth further investigation as a great deal of current pension money goes to very wealthy people who do not need it. [At the same time] the table agreed that this would need to be done sensitively and that there was a danger of penalising people who have been prudent."

Private pension

There was support on some tables for encouraging individuals and private businesses to invest in private pension schemes. Suggestions included:

- The States should encourage occupational pension arrangements to compensate for any States pension deficiency.
- There is a need to marry States pension to private pension schemes

Questions for further research

Some tables raised questions that could not be answered on the day. This is a list of such points that were recorded by the table facilitators:

- How would raising the States pension age affect job availability and promotion prospects for young people?
- Many Islanders have houses elsewhere, for example in France and Spain. Is it possible to estimate what percentage of the older population intends to leave the Island on retirement, and the impact on social security and health costs?
- We would welcome some data on the health implications of working longer, are these negative or positive? Does working longer improve or reduce life expectancy?
- It would be good to have info on the number of births and deaths so would be better informed about the nature of the problem.
- Do we know what private pensions people may have already accrued? Might there actually be more resources in the system than we don't know about?
- Maybe the States should collect information on what happens when people take early retirement – what do they do?

2.3.3 The resident population pays more

Summary of this option

The States has already taken steps to safeguard the economy by agreeing changes to the tax structure, including:

- Introduce a 3% Goods and Services Tax (GST).
- Introduce ITIS - a pay as you earn income tax.
- Cut corporate taxes to 0% except for the finance industry, which will pay 10%.
- Make higher earners pay more (20 means 20).

There are a range of other options available which would mean that the Island's existing resident population would shoulder a greater share of the burden of caring for an older community. These may include increasing taxes further, reducing personal tax allowances or encouraging more private companies to provide certain services, for example health care.

Voting results

There were mixed feelings among the participants about the proposals to increase citizens' contributions in order to maintain current levels of public services. At first, 35% of participants voted against or strongly against increasing personal tax and/or social security contributions (figure 12, page 27). Young people and those in full time education were most likely to oppose this option, with three fifths of those in full time education were against or strongly against (20% and 40% respectively). In the 19-24 age group, all (100%) participants voted against raising taxes and contributions, whilst half (50%) of the 0-18 age group voted against.

However, when asked how much *more* in taxes and contributions people would be prepared to pay in addition to what they currently contribute, only 19% of voters said they would not be prepared to increase their contributions at all. 38% of people said they would pay an additional £200 per person per year (equivalent to £10m in States revenue) and 19% said that they would pay an additional £400 per year (£20m in States revenue). 11% of voters said they were prepared to pay as much as £1,000 more each year (£50m in States revenue) (figure 13, page 27).

This may mean that whilst many people will not actively support increases in taxes and contributions (figure 12), they may be willing to accept some level of increase in order to sustain public services (figure 13).

Those who were self employed were willing to accept higher tax increases, with one fifth (21%) being prepared to pay up to £1,000 extra per year and one fifth (21%) willing to accept more than that. Meanwhile, no students were willing to accept increases above £200 per year. Whilst earlier answers showed a lack of support for increased taxes amongst 19-25 year olds the responses to the question about amounts shows a divide. A third (34%) voted for no increases at all, a third (33%) for a maximum of £200 per year and a third (33%) voted for the maximum choice of over £1,000 per year.

Over half the voters (55%) felt that it would be unacceptable to reduce public services in order to maintain current levels of personal tax and contributions (figure 14, page 27). The self employed were far more likely to support this option than other occupations, with just under half this group voting strongly in favour (18%) or in favour (29%).

Which of these statements best describe how you feel about increasing personal tax and/or social security contributions in order to maintain high levels of public services?
 (numbers shown are percentages of all participants who voted on this question)

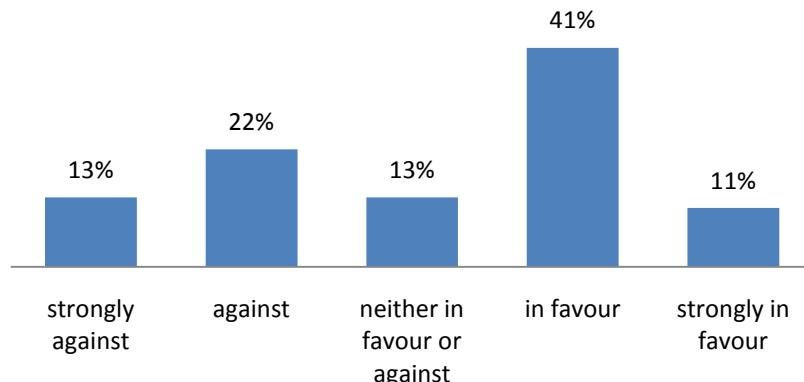


Figure 12

How much more in taxes and contributions would you be prepared to pay each year to meet the economic challenges ahead?

(numbers shown are percentages of all participants who voted on this question)

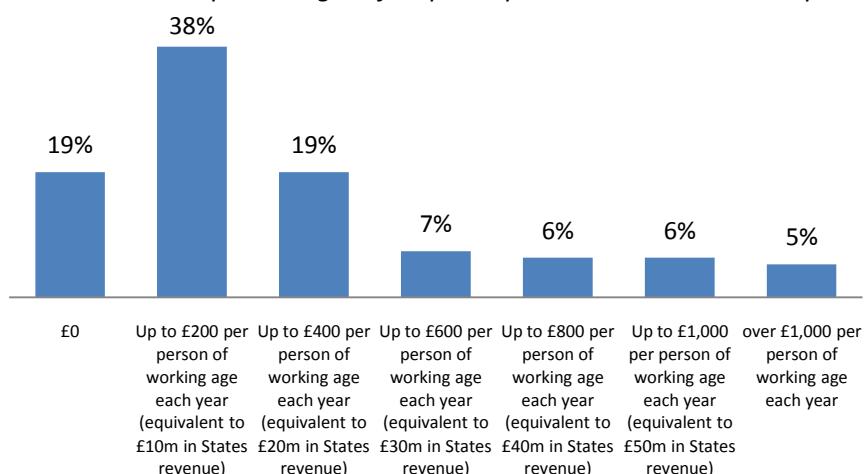


Figure 13

How do you feel about reducing public services in order to maintain current levels of personal tax and contributions?

(numbers shown are percentages of all participants who voted on this question)

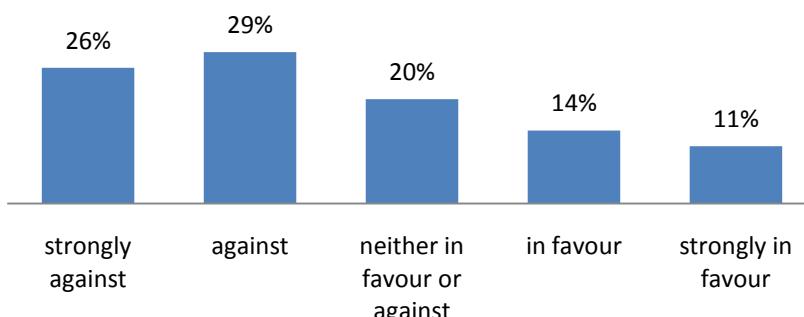


Figure 14

Table facilitators noted that some participants chose not to vote on this question as it did not specify which public services would be cut.

Tradeoff game results

In the tradeoff game participants could choose to increase personal tax and contributions by units of £200 per person per annum. Each £200 unit was equivalent to £10m in States revenue.

All twenty tables chose to increase taxes and contributions to some extent. The most popular option was an increase of £400 per person per annum, equivalent to £30m in States revenue. The distribution of options was as follows:

- £200 per person/year – 3 tables
- £400 per person/year – 8 tables
- £600 per person/year – 7 tables
- £800 per person/year – 1 table
- £1000 per person/year – 1 table

Interestingly, support for increases in personal contributions was considerably higher in the tradeoff game than in the voting. Again, this may indicate that when faced with the full range of options, making a personal sacrifice such as paying more tax is seen as preferable to an option that has wider implications for Jersey's character and society. For example, tables that opted for high increases in personal contributions were slightly more likely to choose lower levels of inward migration and less growth in high-value industries (see Appendix 2).

Table discussions

The discussions in this session covered not only personal contributions, but also the issues of GST, business tax and citizens paying directly for services. There were heated discussions around these subjects and many tables were unable to reach an agreement until forced to do so in the tradeoff game. Nevertheless, there was evidence of a reluctant acceptance among many participants that paying more through direct or indirect taxation or by paying directly for services may be an inevitable consequence of the ageing society.

Questions and concerns

The most frequently raised concerns in response to the “paying more” proposals related to the effect raised taxes would have on less well off people and the impact on Jersey’s attractiveness as a business centre and place to live.

Impact on cost of living

Some participants expressed concern that cost of living is already high in Jersey and that raising taxes and contributions would disproportionately affect the poorer sections of society. These two points recorded by table facilitators illustrate these concerns:

- Some on the table did not feel that there was much room for paying more due to the high cost of living in Jersey for middle earners. Whilst we may pay less than in the UK there are other costs which are higher here like cost of buying homes and food.
- Not everyone can afford to pay more – many families are going to suffer under GST and families are already struggling under the high cost of living. There are a large proportion of people (esp. immigrant workers like the Polish) just above the welfare line who will be badly affected. Social security is needed to help the most disadvantaged or low income groups.

Impact on Jersey's attractiveness as a business centre and place to live

Some participants felt that the low tax system is what makes Jersey attractive as a place to live and do business. They were concerned that raising taxes would make people and business leave. These two comments illustrate this concern:

- Low taxes and strong public services are among the factors which encourage people to live and work here. We should be cautious in respect of the economic impact of any reduction in these attractions.
- We need to consider the economic impact of raised taxes. For example, would it deter economic activity? If we raise business tax, there is a risk that the finance industry will go elsewhere. We need to maintain competitiveness within global finance industry.

However, other participants were not convinced by these arguments. As one facilitator noted from their table discussion: "How much would we have to raise business taxation for business to leave? Can't we make ourselves sticky some other way – we have the knowledge, the reputation, the skills, the time zone, do these count for nothing?"

Suggestions and ideas

The discussions revealed many ideas for how the public and business may contribute more in the future.

Paying for services

Many tables supported the idea of paying directly for services in some way or another, although some stressed the importance of not pricing poorer people out of public services. Points and suggestions included:

- Building on successful existing examples, e.g. pest control – the table were quite happy to pay Public Health for this service.
- Positive knock on effects as a result of introducing payment, e.g. garbage collection. Focuses people and encourages recycling.
- Happy to pay directly for what we use.
- General consensus that increasing personal tax and introducing compulsory insurance in some shape or form was worth considering – especially private medical insurance for all.
- More means testing, e.g. prescriptions which are currently subsidised for everyone.
- States services should be reviewed to see whether any of them could be delivered outside Govt on a user-pays basis.
- It would be worth looking at a contribution scheme for residential care.
- Depends on which services you are going to have to pay for but generally the group were in favour of the "user pays" principle.
- Set up a private hospital – cf Stuart Syvret's proposal a while ago.
- Charge people for no shows at hospitals.

Personal tax, GST, insurance

Many groups expressed willingness to accept an increase in taxes and other contributions in order to avoid cuts in public services:

- Happy to pay a bit more – GST is OK as it spreads the financial responsibility around the whole population. OK at 3% and alright to raise it but not to UK VAT rates.
- The table was prepared to contemplate additional percentages being added to GST – with a potential tolerance up to 7 or 8 % if required in time.
- Unanimous interest in exploring, as a real priority, the option of an additional social insurance fund (collected by SSD and actuarially managed) to pay for long term care requirements (residential, nursing or other care in the community) as has been the case in Guernsey.
- Introduce compulsory insurance schemes; increase Social security contributions to make it a taxable amount over and above required pension contribution levels.
- We're happy to pay for the privilege of living somewhere lovely. There's clearly the capacity to pay more.
- Soc Sec contributions could be adjusted and increased for those who are able to pay more.
- The States should not introduce a separate health insurance scheme; this is not efficient and will result in separate administration and funding to set up. The States should simply increase existing social security payments and avoid additional costs of setting up a new system.

Some were only willing to accept higher taxes if it meant greater efficiency in the Public Sector and tighter controls of public expenditure.

- Reduce public spending on gold plated services and on capital programmes that are 'over designed' for Jersey.
- Increase in contributions needs to be handled in combination with reduction in States spending. A number of examples were mentioned as not good value, steam clock, Island branding.
- Small amount of increased taxation reluctantly understood but only if matched with greater efficiency in Public Sector and control of Public Expenditure.

Higher earner tax bracket

There was some support for higher taxes for those on very high incomes.

- A higher band of tax should be considered for the very high earners.
- General consensus that paying more would be acceptable but only if higher earners were also doing so. A perception existed that tax deals favoured those arriving as high net worth individuals and that these folk are paying less tax than others in percentage terms.

Business tax

Some tables raised the potential for increased taxation on businesses:

- The potential for securing more business tax should be explored, to tap some of the vast wealth held within the Island finance/ business community.
- The differential rate of taxation between on and off-Island operations should be equalised – for example companies working from the Island but not paying tax here could pay a 'licence fee'. At the moment local companies are discriminated against – there should be a company tax.

Others were concerned that raising business tax make Jersey less attractive to foreign investors and businesses and would therefore have a detrimental effect on the economy.

Other tax related suggestions

There were a number of other ideas for how to raise revenue through taxation:

- Around the world other economies are using sales tax.
- Change tax structure - how much more income could be generated if say 20/1/-1 approach not adopted?
- Increased taxes should be related to social/health/environmental objectives.
- Efforts should be made to tackle the black market – people paying cleaners, gardeners in cash, etc and the recipients not then declaring it. Those paying the individuals should let people know who they have paid.
- 20 means 20 should be applied with all paying the same proportional amount in tax.
- The tax regime should be flexible to reflect the level of public services that were used.
- Not keen on indirect taxes – worries about cost of admin of it – as with GST. Should use existing mechanisms - not invent new ones.
- There are many people who can afford to pay more – for example why isn't there tax on boat fuel?

Other

Other ideas and suggestions logged by the table facilitators included:

- Maintain States property in better condition and sell off more.
- Create a better turnover of States assets and investments (e.g. Fort Regent).
- Better quality community action to support each other and allow people to remain in their homes – point was this reduces govt costs (although didn't recognise that this increases/extends pension costs).
- Remove cap on social services.

Questions for further research

There was a recurring sense amongst the participants in this session that they were asked to address a complex issue with very limited information. The following areas of uncertainty were recorded by the table facilitators:

- The group felt that they needed a lot more information to address this issue (a lot of our time was spent taking to the experts to find out more).
- Details about what money is used for currently, e.g. how much does healthcare and education cost per person and how much of tax money does this represent.
- Uncertainty whether UK contractors who employ UK staff and bring them over for a few days/weeks/months currently pay tax.
- The table felt that the question about paying directly for services, which is a BIG issue that had not been raised before in the talk, should have been flagged up earlier.
- Issues other than money were given insufficient prominence or attention.
- What is a 'gold plated' public service?
- Limited knowledge on the table of what range of services the States provided - States services should be benchmarked against other jurisdictions so that people could see what value/cost of States services.
- Perception that States wastes money – to some extent true but also we are well provided for compared to many others.
- If we lose all the business by increasing taxes we will have a population reduction, but what's the net financial situation?

2.3.4 Allowing more people to live in Jersey

Note that at the event his session dealt with both inward migration and housing. To facilitate the analysis the findings have been divided into two separate sections. See pages 37-44 for an analysis of the housing discussions.

Summary of this option

Increasing the size of the working population by allowing increased inward migration could help offset the decline in economic activity caused by the fall in the working population. If the Island does permit inward migration, the impact will depend on the numbers involved.

The States of Jersey developed five inward migration scenarios which were shared with the participants at the conference. The scenarios are not exact predictions but simplified illustrations of the range of choices available and the impact of those choices on Island life.

At one end of the scale, the Island could take active steps to ensure that there is no further increase in the migrant population. Making the economy more productive and increasing taxes would help compensate for having fewer working people. However, the shrinking workforce and rising tax burden would make it more difficult for Jersey businesses to compete, leading to a significant decline in economic activity, reducing the standard of living and changing the way of life Jersey enjoys today. At the other end of the scale, Jersey could bring in the revenue needed to maintain government services by increasing the population by up to 1,400 people (650 heads of households) per year. However, this would require extra funds to be spent on schools and infrastructure and the new housing needed would affect the environment.

The five scenarios that were discussed were:

- Scenario One: No inward migration
- Scenario Two: 325 new residents every year (150 heads of households plus families)
- Scenario Three: 540 new residents every year (250 heads of households plus families)
- Scenario Four: 700 new residents every year (325 heads of households plus families)
- Scenario Five: 1,400 new residents every year (650 heads of households and families).

For more information on the details of the scenarios please see the Imagine Jersey Consultation Guide.

Voting results

The results of the vote on inward migration show that it is a topic that divides the Island. Whilst nearly half (49%) of participants stated that they were in favour of continued inward migration at controlled levels as a solution to the predicted deficit in the future, two fifths (40%) were against and a large proportion of these (25% of total) were strongly against the inward migration option (figure 15, page 33).

People born in Jersey were more likely to oppose further inward migration. More than half (54%) of participants who were born in Jersey were against the inward migration proposal, with just over a third (37%) of this group were in favour. Among those born elsewhere less than a third (28%) was against inward migration, with nearly three fifths (59%) in favour (figure 16, page 33).

Different age groups also showed vastly different views on this issue. Those aged 0-18 and 19-24 were strongly opposed to increased inward migration; two thirds (67%) of both groups voted against this option. The 25-34 age group was the most positive, with two thirds (67%) voting in favour (although none of this group voted strongly in favour). Three fifths (62%) of those aged 35-44 and 45-54 (62% and 63% respectively) voted in favour. The older age groups had more mixed views with a slight majority in favour.

Which of these statements best describe how you feel about allowing more people to live in Jersey as a solution to the economic challenges ahead?
(Numbers shown are percentages of all participants who voted on this question)

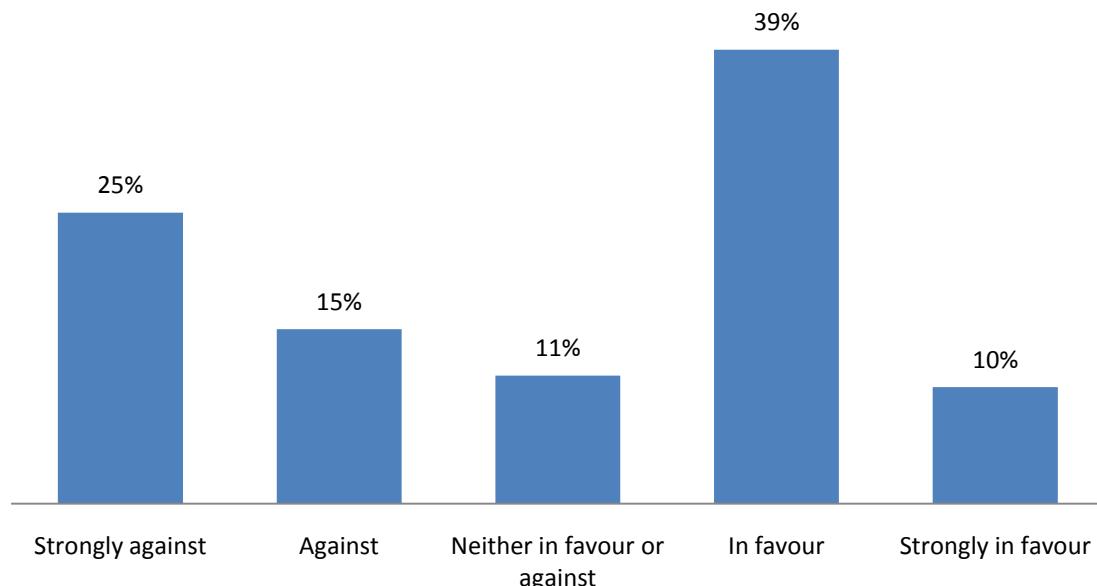


Figure 15

Which of these statements best describe how you feel about allowing more people to live in Jersey as a solution to the economic challenges ahead?
(Breakdown by place of birth)

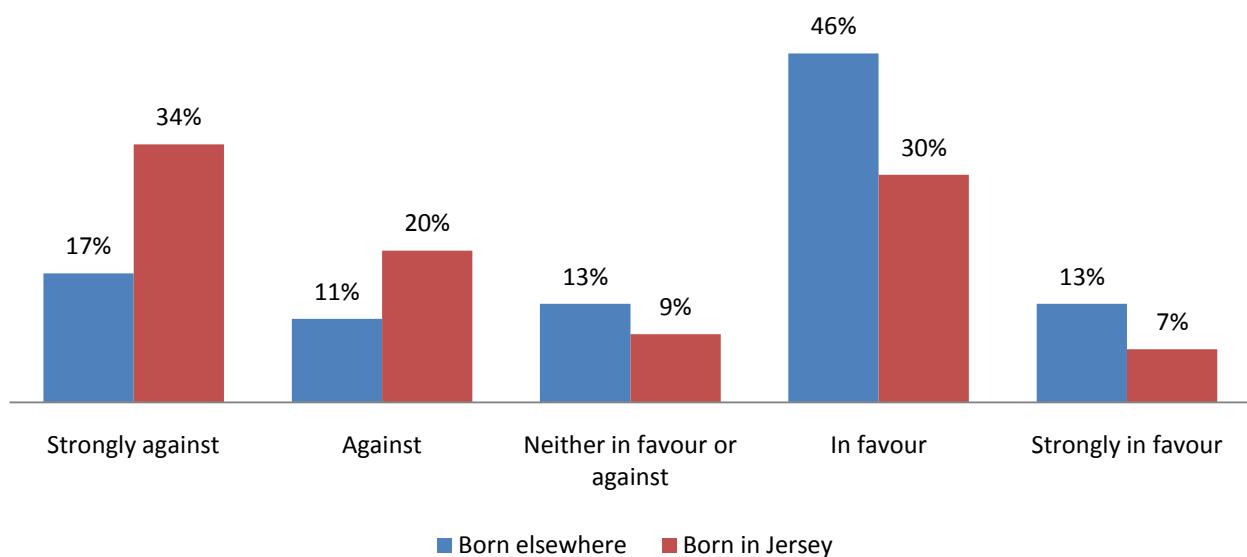


Figure 16

Tradeoff game results

In the tradeoff game the tables had to select one of five options with the following values:

- Scenario One: No inward migration (£0 million)
- Scenario Two: 325 new residents every year (150 heads of households plus families) (£10 million)
- Scenario Three: 540 new residents every year (250 heads of households plus families) (£20 million)
- Scenario Four: 700 new residents every year (325 heads of households plus families) (£40 million)
- Scenario Five: 1,400 new residents every year (650 heads of households and families) (£120 million).

The game included a clause which stated that if a group chose the “no inward migration” option they could not grow the economy by more than £50m as this would not be viable with the existing workforce.

As with taxation, the results of the tradeoff game showed a softening of the strong opposition expressed in the voting and table discussions. Whilst two fifths of participants voted against any further inward migration, only one table actually went for this option in the tradeoff game. In fact, as many as 13 tables out of 20 opted for the third scenario of 540 new residents every year. The distribution of choices was as follows:

- No inward migration – 1 Table
- +325 residents per year – 6 Tables
- +540 residents per year – 13 Tables

The tradeoff game hence indicates a reluctant support for limited inward migration among people of working age, but no support for the higher levels of inward migration as outlined in Scenarios Four and Five.

Table discussions

There were heated discussions in this session, with strong views being expressed around the room. Many tables found it hard to reach an agreement and one table facilitator noted that this issue was the “greatest area of split within the group”. A common sentiment seemed to be that whilst inward migration was not something that people wanted, it may be a necessary in order to manage the challenges facing Jersey in the future. These notes from the facilitators’ records illustrate the divisions within groups and the feeling of reluctant acceptance among most:

- When weighing up all of the options, it was agreed (by most) that some inward migration would be necessary.
- The table had a range of views – from those who were very reluctant to encourage further inward migration to those who recognised that a controlled inflow would be essential to re-address the dependency equation that it was recognised was going out of kilter.
- Too much inward migration would place too much stress on our precious greenfields. It was recognised that net nil was unrealistic, that 325 or 540 new residents each year was acceptable but that the two most extreme inward migration scenarios were completely unacceptable.

- The group saw this as inevitable although they did not support it. Perhaps less of a problem as long as the countryside is protected and the quality of new dwellings is kept to a reasonable standard.
- Need for some migration – all economies will compete for younger people.
- Acceptance that the population should be allowed to increase to support the growth of the economy, but not at the extreme level of in-migration: general agreement around 325 new residents each year.
- Agreement that more people could be brought in up to a point (option 3) 540 new residents each year.

Others remained strongly opposed to the inward migration option, as these two notes from the facilitators' records illustrate:

- The Island should adopt a nil net migration unless it is proven that all other avenues have failed. It is too easy an option just to let in more people. Increasing the Islands population needs to be sustainable and properly controlled.
- This is a perpetual cycle of bringing people in, building houses, paying their pensions – it is unsustainable.

Questions and concerns

Participants raised numerous concerns about the implications of inward migration on Jersey's society, environment and culture. In particular, there was a strong sense that inward migration needs to be controlled and managed by the States. These are some of the issues that were logged at the tables:

- We must be very careful not to destroy our heritage.
- Some disagreement over where these people would work. Some felt the Finance industry would employ them, others felt this was already overstaffed.
- Low cost immigrant workers are necessary but affect the opportunities for local people – the issue of short contract immigrant construction workers was raised.
- CONTROL was the key word of agreement. Yes we might need more people – but it must be controlled.
- Young immigrants often bring dependants who have a different age profile.

Suggestions and ideas

Most suggestions logged concerned the measures the States could put in place to manage inward migration and ensure that the people who do come to Jersey are the "right" people for the economy.

- Introduce a point system for inward migration to attract the right people (e.g. as in Canada and Australia).
- We could get more better qualified people if housing qualifications were relaxed.
- Provide a licence for immigrant workers, providing them with more rights than immigrants who do not work.

Questions for further research

There were a number of areas of uncertainty identified. The following is a list of questions that were logged by the table facilitators:

- Does any one know the optimum population size for Jersey given the distribution of public services?
- Are local people having children later because they can't afford to do it when they're young?
- How many 'J Cats' are there on the Island and what financial effect do they have on the local population?
- A surge in young immigrant population may create a cycle of retirement issues which would occur every 35 years.
- Jersey has an unusually high percentage of rental property, said to be 50% of the housing stock. This creates greater mobility, and assumptions about mobility levels based on UK statistics may be appropriate. "One half of the population can leave the Island tomorrow by giving their landlord three months notice."
- Some issues around the possible transitory nature of the Polish population.
- Allowing more people will potentially create problems for the future which will spiral out of control after 2035.
- If increase population consider also infrastructure implications e.g. no. of new warehouses needed to accommodate essentials e.g. food.

2.3.5 Housing needs in the future

Summary of this option

This session of the conference explored Jersey's housing needs for the future. Allowing more people to live in Jersey raises the question of where they will live and what impact that would have on Jersey's way of life. However, even without further inward migration it is likely that more houses will need to be built as more people will be living alone in the future. This session looked at options for building new developments in town and on the waterfront, new high-density family homes, expanding villages or suburban centres and building on greenfield land.

Voting results

The voting showed very strong opposition to any form of building on greenfield land. Over three quarters (76%) voted against new developments on greenfield land, with only one sixth (17%) in favour (figure 17 , page 38).

There was even stronger opposition to the proposal to build a new village – over four fifths (83%) were against this option, with less than a sixth (13%) in favour (figure 18, page 38).

The proposal to expand an existing village was marginally less unpopular, although nearly two thirds remained against (64%) and only a quarter (25%) was in favour (figure 19, page 39). Different age groups had different views on this option. Among those aged up to 18 over three quarters (78%) were strongly opposed and no-one supported the idea, whereas of those aged 35 to 44 only a quarter (25%) were strongly against and three fifths (62%) were in favour.

The proposal of creating suburban centres at the edge of St Helier on unspecified sites also met with resistance. Over half (53%) of voters were opposed to this option and less than a third (30%) in favour (figure 20, page 39).

However, when the question was rephrased to find out if participants would support the development of suburban centres on *brownfield* sites only, the vote showed that the participants were broadly in favour of such developments. Here, less than a sixth (16%) voted against, and nearly three quarters (74%) in favour (figure 21, page 39).

Hence one of the strongest messages coming out of the event is the value and priority that the majority of participants place on greenfield preservation. Statistically this is one of the strongest messages to come out of the process.

When the question of new developments in town was raised, the participants made clear that any support for this option was on the condition that these new homes needed to be of high quality and affordable. Over three quarters (76%) voted in favour of such developments, with less than one sixth (12%) voting against (figure 22, page 40).

More creative solutions to future housing needs, such as moving the port or reclaiming new land, also received support from the participants. Over two thirds (68%) were in favour of exploring such options, with about one sixth (16%) against (figure 23, page 40).

Given the high level of support expressed for new houses in the town the question was asked what currently stops people from moving to St Helier. The participants were given a number of options and could choose as many as they thought applied (figure 24, page 41). There was an even spread of votes, but the three most frequently chosen options were a lack of family sized dwellings, a lack of parking for residents and concerns about safety at night.

A further vote showed that half (50%) the participants would consider moving to St Helier, although most of these would only do so if certain conditions were met. One third (33%) of participants said that they would not move to St Helier under any circumstances (figure 25, page 41).

Finally, a vote on where to site any necessary developments outside of St Helier showed that one fifth (20%) is against any new developments outside the town area at all. The largest support was for new developments on the edge of St Helier and spread across a number of smaller locations. The prospect of a completely new settlement received very little support (figure 26, page 41). This reinforces the results of earlier voting on the option of a new village (figure 28, page 38).

Which of these statements best describe how you feel about building new homes on greenfield land on the edge of existing developed areas?

(numbers shown are percentages of all participants who voted on this question)

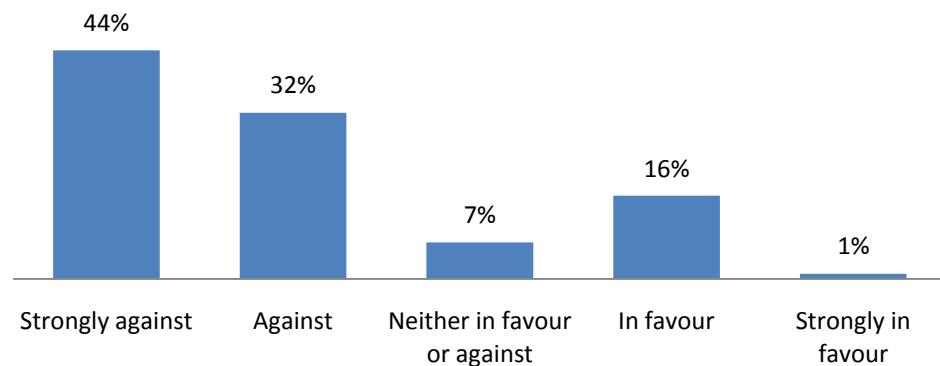


Figure 17

Which of these statements best describe how you feel about building a new village?

(numbers shown are percentages of all participants who voted on this question)

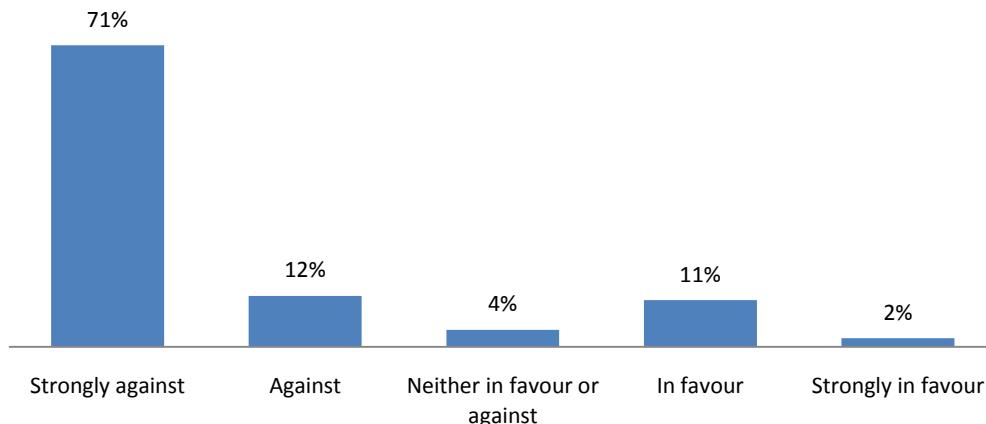


Figure 18

Which of these statements best describe how you feel about expanding an existing village?
 (numbers shown are percentages of all participants who voted on this question)

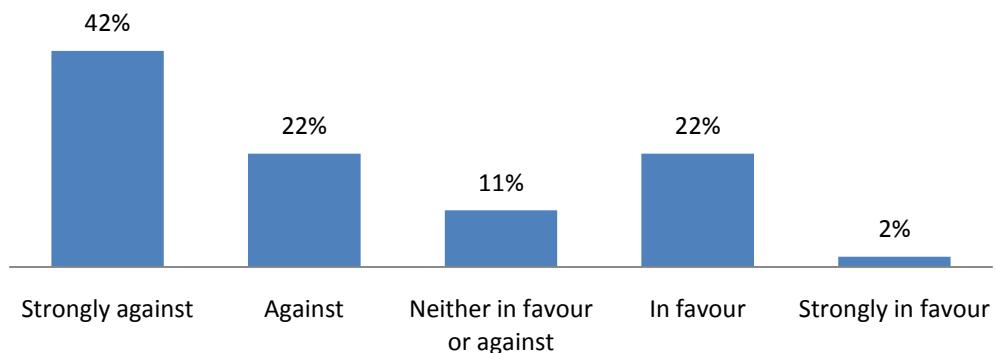


Figure 19

Which of these statements best describe how you feel about creating higher density suburban centres (with work and residential areas) on the edge of town?
 (numbers shown are percentages of all participants who voted on this question)

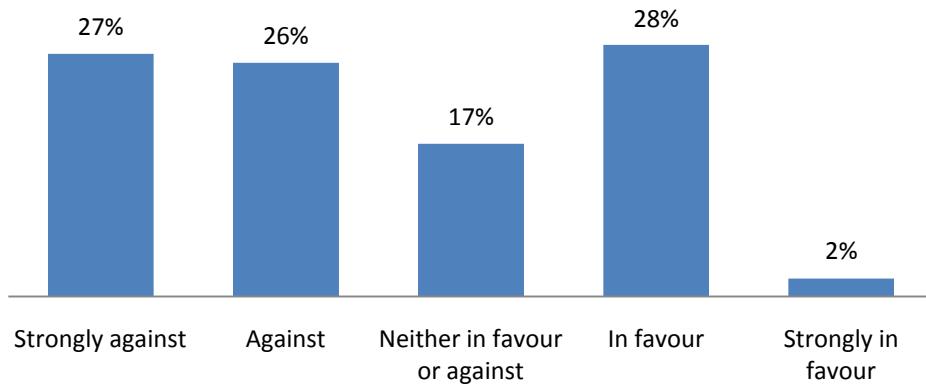


Figure 20

Which of these statements best describe how you feel about creating higher density suburban centres (with work and residential areas) on the edge of town – BROWNFIELD ONLY?
 (Numbers shown are percentages of all participants who voted on this question)

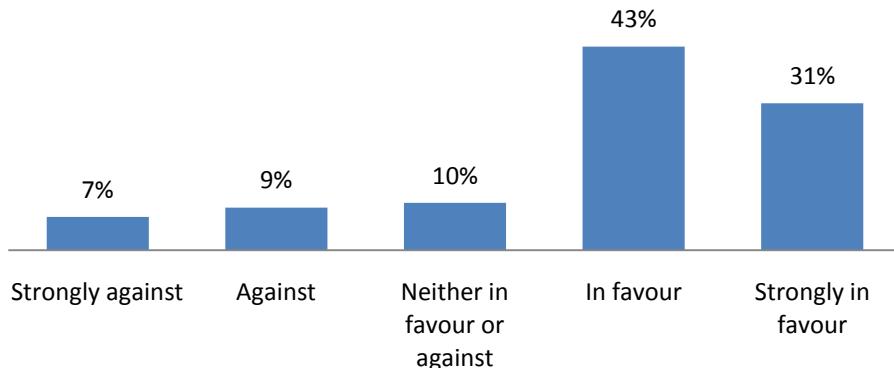


Figure 21

Which of these statements best describe how you feel about building high quality higher density residential developments in town, e.g. apartment complexes?

(Numbers shown are percentages of all participants who voted on this question)

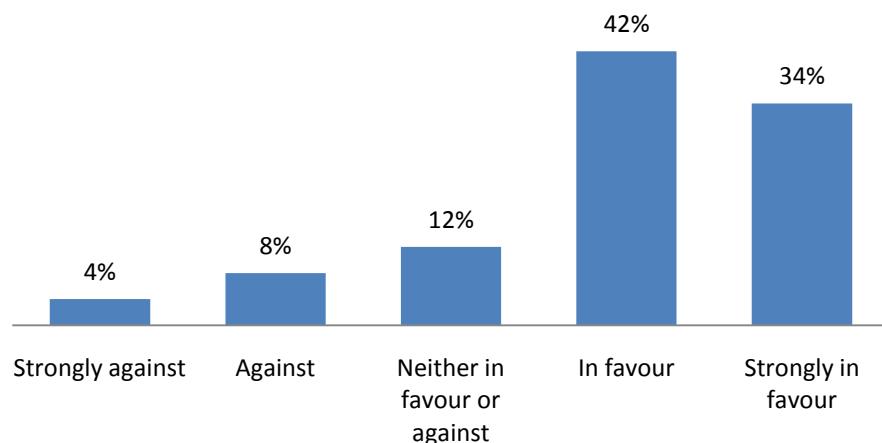


Figure 22

Should we consider creative solutions to increasing the land we have for housing, such as moving St Helier port or reclaiming more new land?

(Numbers shown are percentages of all participants who voted on this question)

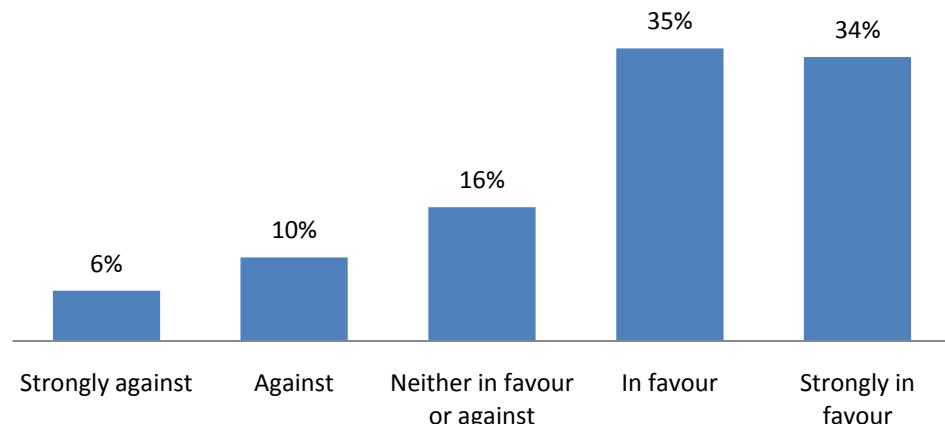


Figure 23

What do you think currently puts people off moving into St Helier from other Parishes?

Please choose all that apply.

(Numbers shown are percentages of all participants who chose each option)

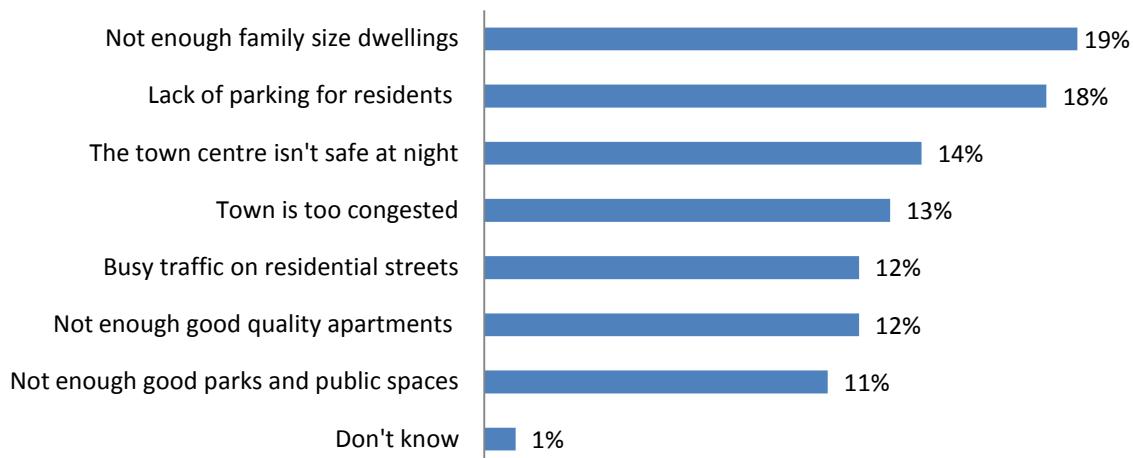


Figure 24

Would you consider moving into St Helier?

(Numbers shown are percentages of all participants who voted on this question)

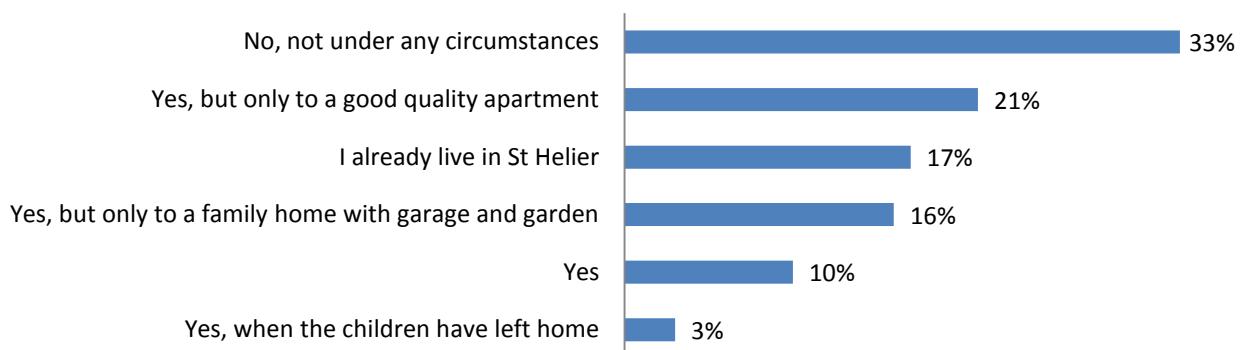


Figure 25

If we had to develop outside the town area for housing, my preferences would be:

(Please choose all that apply)

(Numbers shown are percentages of all participants who chose each option)

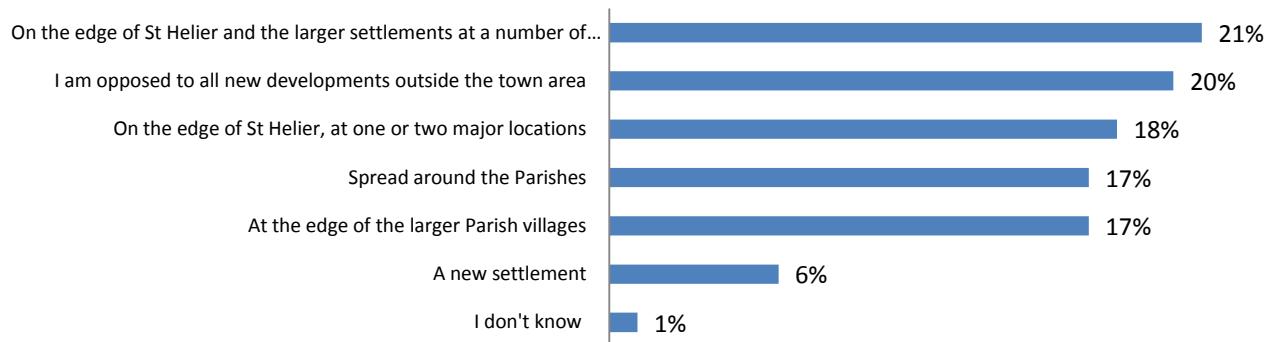


Figure 26

Table discussions

As in the survey and the voting, statements of support for new housing in the table discussions were often phrased with caveats. These are some that were captured by table facilitators:

- Support for more buildings as long as of good quality and affordable.
- Support for concentrating new (good quality) developments in St Helier.
- Acceptance of some development in the countryside to support rural communities and Parish life; also support development in the countryside that would reflect/sustain the Island's dispersed settlement pattern, i.e. in hamlets; around farm groups.

Questions and concerns

Quality and affordability

Quality and affordability were key concerns that appeared repeatedly, especially in terms of people on low incomes and new immigrants:

- Many small homes built recently do not provide for quality family life and lead to social problems. Better design would mitigate the impact of a larger population.
- New building must be of excellent design and quality; size of rooms must meet minimum requirements.
- For immigrants, homes are expensive and residency issues provide problems.
- Young Polish lady started as a hotel worker and would not have stayed if she had not met a Jersey fiancé due to the poor standard of living accommodation. Now has two sisters also living here.

Protecting greenfield land

As stated earlier a key theme in the table discussions was the importance of preserving greenfield land, as these points captured by the facilitators illustrate:

- Strong agreement that Green Zones MUST remain GREEN.
- Some extension to village developments but not on greenfields – brownfield sites and windfall.
- Wherever possible appropriate buildings needed to be sited in town or on brownfield sites, Planning need to rise to this challenge.

However, not all participants agreed that all greenfield land needed to be preserved, as one facilitator noted: "Young people on the table are very concerned about environmental issues but don't overly care about all the green spaces, some could go."

Living in St Helier

As demonstrated in the voting, whilst there was general support for more housing in St Helier there were issues raised around the things that put people off moving into town from the Parishes. There were also concerns about the developments that were being planned in town, with concerns raised about the amount of new buildings that are used for businesses rather than housing.

- Table felt that although they were all in agreement of more building in town – not many of them would like to live in town permanently – this would be a problem.
- The Waterfront design is not right, the proportion of accommodation and finance areas will lead to a ghost town at night and the accommodation should be around the central squares. Others felt that didn't matter and a finance district is unlikely to host a residential area too.
- Concern that although 'they' say the Waterfront will be used for housing it won't be as this has happened in the past.

Consequences (including environmental)

Other concerns raised dealt with the consequences of more housing:

- The group were generally relaxed about increased housing, but saw the increase in the number of cars as the significant problem. There would need to be a review of the planning requirements to provide car parking with new dwellings.
- Any development should be sensitive to the environment.
- The possibility of thousands of new dwellings being built would change the nature of the Island in a way which could create unpredictable consequences.

Land reclamation

There were some objections logged in response to the proposal of further land reclamation:

- No to land reclamation.
- Uncertain about viability of further land reclamation, particularly against the context of global warming and increasing tide levels.
- Some felt we should reclaim land to give us the necessary deep water berth, RAMSAR shouldn't stop reclamation. Others felt it was expensive, unnecessary and damaging to the environment.

Suggestions and ideas

There were numerous suggestions for how future housing developments could be planned to fit with the aspirations and priorities of Jersey's public.

Ideas for developments in St Helier

- Need green spaces, trees, etc in St Helier and more pedestrianisation – we need to make St Helier a nice place to live in and visit.
- Need to make St Helier a better place to live and to encourage families back – get rid of bedsits and rejuvenate old stately town houses.
- Regeneration of town important – change the use of old office blocks to residential.

Ideas for developments in the Parishes

- If development was to occur in the Parishes, it should be vibrant and should be decided by local choice. An example of a good development was Gorey.
- Table liked the picture of the village that Paul Nichols showed – (Dorset?)
- Examples given of developments in the Parishes of housing complexes for old people - a move that was widely supported.
- More development outside St Helier is needed to retain vibrancy of villages, otherwise it will be the beginning of the end of country Parishes if populations there age and schools and shops close. Keep Parish developments small and in keeping with existing buildings.
- If you want Jersey to remain attractive in comparison to other competing jurisdictions you can't just cram everything into town, high value immigrants want good high quality facilities.
- More village developments financed by and supported by the Parish – cf St Ouen and St John.
- Develop Parish communities to attract younger families to provide the employees that a Parish needs.

Other suggestions

- Living in France should be seriously considered – good commuter ferry introduced and serious efforts made to overcome the double tax situation that currently exists. Real dialogue needed with French authorities. Some of the table liked the idea of the bridge to France too and thought it was not as ‘way out’ as one might initially think.
- Licence landlords to improve quality standards.
- The policy of the early 1990’s in moving ‘bad neighbours’ out of town and assisting redundant or disused buildings (hotels, guest houses, etc) though expensive should be very actively pursued once again.
- Make the waterfront a new Parish.
- Buying online will have an impact on the retail environment – there will be fewer shops and hence more space for residential uses.
- There was a discussion around whether the place of work needs to be in St. Helier, or whether the relocation of places of work in the Parishes would reduce travel requirement.

Questions for further research

- If new houses are built and the population goes down what happens with the houses?
- Do a survey on the number of properties that are “not lived in”, i.e. for tax reasons.

2.3.6 Baseline questions

In order to track if and how participants' attitudes shifted during the course of the day, a series of baseline questions were asked at the beginning of the event and then repeated at the end.

These votes showed slight shifts in opinion on various points. In the initial vote, participants' top three priorities for maintaining quality of life in Jersey were a healthy economy, environmental protection and controlling the population levels. At the end of the day, these had changed: protecting greenfield land had become first priority, with maintaining a healthy economy in second place and protecting the environment third. Maintaining Jersey's low-tax system, maintaining current work-life balance and maintaining high levels of public services had all decreased in popularity (figure 27, below).

Which of these priorities are most important for maintaining quality of life in Jersey?

Please choose your top three.

(Numbers shown are percentages of all participants who voted for each option)

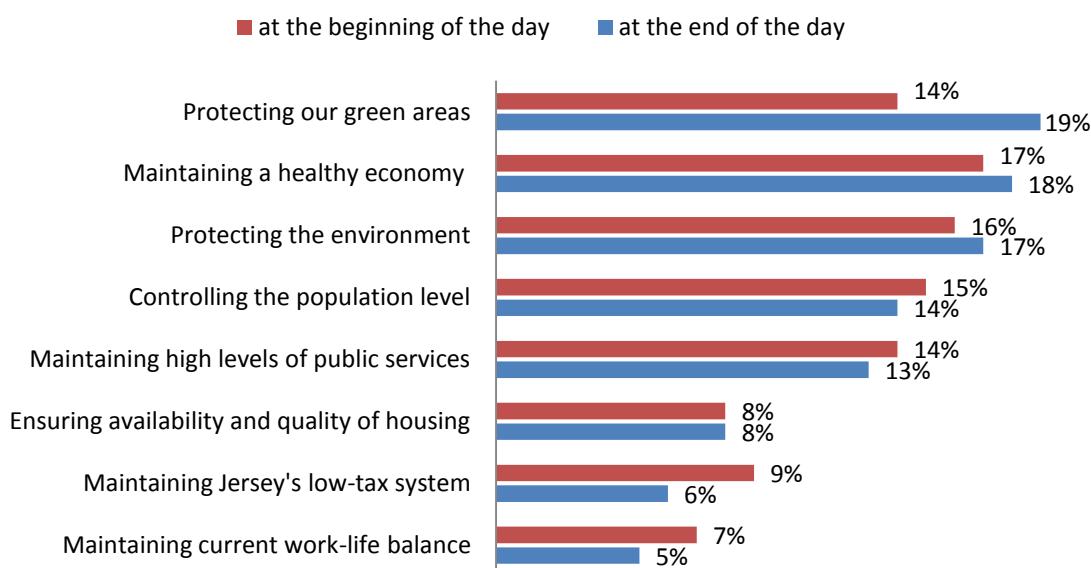


Figure 27

There were also some shifts in what changes people said they were prepared to accept in order to maintain or improve quality of life in the future. At the end of the day, there was an increase in acceptance for the working longer, paying more and inward migration options. Meanwhile, fewer people voted for a slower growth in the economy, cuts in public services or less green spaces. Two percent of voters remained opposed to all of the options at the end of the day (figure 28, page 46).

Which of these options would you be willing to accept if it meant that your quality of life was maintained or improved over the next 27 years? Please choose all that apply.
 (Numbers shown are percentages of all participants who voted for each option)

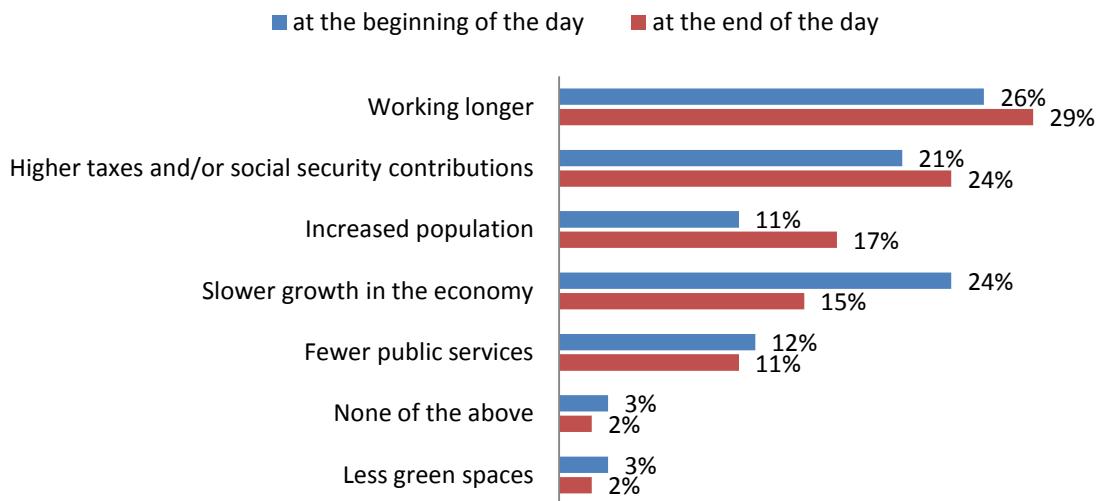


Figure 28

Finally, the participants were asked to rank four options: growing the economy, working longer, paying more in taxes and/or contributions, and allowing more people to come and live and work in Jersey. There was no difference in the ranking order between the two votes; the overall picture is one of striking continuity. However, the second vote shows some changes in preferences: growing the economy and allowing more people to come to live and work in Jersey had increased slightly in popularity, whilst working longer and paying more had become slightly less popular (figure 29, below).

Which of these options would you be willing to accept if it meant that your quality of life was maintained or improved over the next 27 years? Please rank the options in order of preference.
 (Numbers shown are the distribution of points for each option)

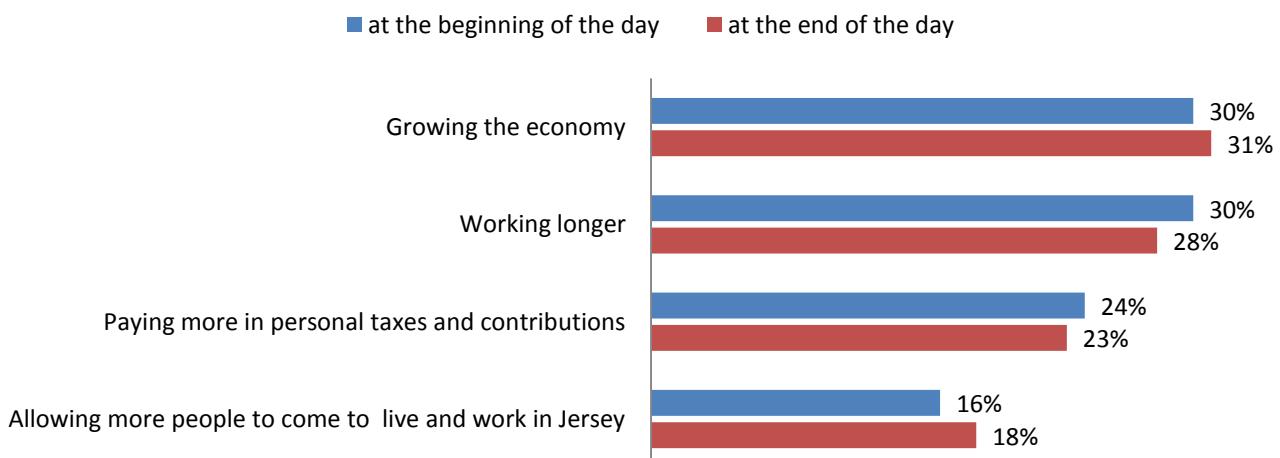


Figure 29

2.4 Other Suggestions on the Day

Text messages

At two stages on the day participants were able to text in their views using their electronic key pads. This section shows their ideas and comments:

Inward migration

- Points based inward migration system
- Introduce a visa system for those seeking employment
- Inward migration controls needed - like Australia have
- Attract the right people to join workforce.

Old people

- Ageism defeats experience
- Establish an employment forum for over 65s
- People don't get old overnight and retirement should be phased in like the pension itself
- Over 50s have 80% wealth in UK
- Unique pensions for unique people
- Keep schools open to retrain older people.

Innovation

- Look outside the box
- ID cards with various info would provide census information.

More information needed

- We have insufficient demographic data to make informed choices
- In the last century there were 3 baby booms. What lessons can be learned? Has the echo effect been understood?
- Do we know proportion of future pensioners who will have their pensions made up by off-Island sources?
- More evidence of fact.

Young people

- Encourage our young people to return to Jersey
- Stop so much migration so there is not enough part time jobs for students
- More development on the waterfront to maintain efficient and attractive growth to draw in more of the younger generation
- Jersey school leavers should have priority for local jobs
- More financial help for young families with children as child care is expensive
- Women are starting families later in life because of economic pressures.

Other suggestion

- Reducing housing qualifications
- Jersey 2020 expo?
- Take action with Polish government about having a proper embassy.

About the process

- No other democracy gives their people the opportunity for free speech we were given today.

Other ideas from the tradeoff game

The tradeoff game allowed the participants to come up with their own suggestions. Some of these were assigned a value by the tables; these values are estimates by the participants only and have not been validated by experts. The suggestions were:

- Blampied proposal - £10 million
- Non-Jersey owned companies tax - £30 million
- Private insurance - £5 million
- Flexible retirement incentives (no value attached)
- 20% GST on luxuries - £10 million
- Increase GST - £5 million
- Reducing cost of government services - £30 million
- Reduce state employees by 20% (no value attached)
- Reduce state budget by £100m by 2013
- Other options to analyse (no value attached)
- Public service efficiency savings - £10 million
- Luxury tax - £10 million
- Working longer optional - £10 million
- Reduce civil servants - £10 million

It is notable that several of these ideas revolve around higher taxes for businesses and high income earners. There is also a strong current of improving public sector efficiency and cutting back on public spending.

See Appendix 2 for the tradeoff game results.

3. Summary of Survey Findings

This chapter summarises the findings of the Imagine Jersey 2035 survey which ran between 26 November and 31 December 2007. The survey was conducted by [Involve](#) in collaboration with the States of Jersey as part of the Imagine Jersey 2035 consultation process.

The aim of the survey was twofold:

- 1) To inform the wider Imagine Jersey 2035 consultation process by exploring:
 - a. what the residents of Jersey value about life in Jersey today
 - b. people's aspirations for Jersey for the next 30 years, bearing in mind the anticipated challenges of the ageing society.
- 2) To help people understand the changing nature of Jersey's demographics and reflect on what it means to them.

1257 people completed the survey. Respondents were self-selected and were able to complete the survey either online, via the States of Jersey website, or by completing a hardcopy of the survey and submitting it to the States of Jersey. Hardcopies were available in English, Polish and Portuguese and could be ordered from the Communications Unit at the States of Jersey. They were also distributed at Parish Halls, the States Bookshop, the Customer Service Centre at Cyril Le Marquand House in St Helier, the Public Library, Maritime House, Jersey Airport, Communicare in St Brelade, St Peter's Community Centre, Jersey's Secondary Schools and the General Hospital. The survey was advertised in the media and on the States of Jersey website.

Due to the online availability of the survey on the internal States of Jersey network, public sector employees accounted for a larger proportion of respondents than that which they actually represent in the overall Island population. Hence, except for the distributions of demographic variables shown, survey results have been weighted to account for the over-representation of working people and of public sector employees in particular.

3.1 Demographic profile of respondents

The demographic data presented on **pages 3-6** are the unweighted (i.e. raw) results from the survey.

Total number of respondents: 1257

Sex: male 52%
female 48%

Age: 65+ 4%
55-64 13%
45-54 25%
35-44 26%
25-34 20%
18-24 7%
0-18 5%

1. Where were you born?

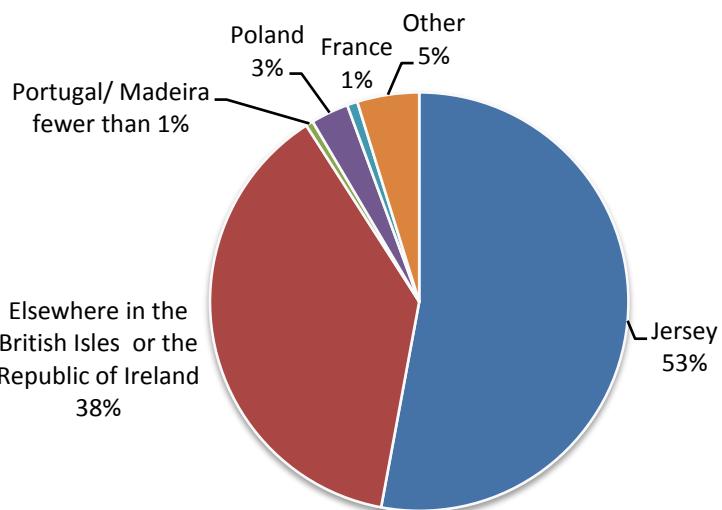


Figure 30⁶

⁶ For breakdown of actual population, see Chapter 2, page 10.

2. Are you currently:

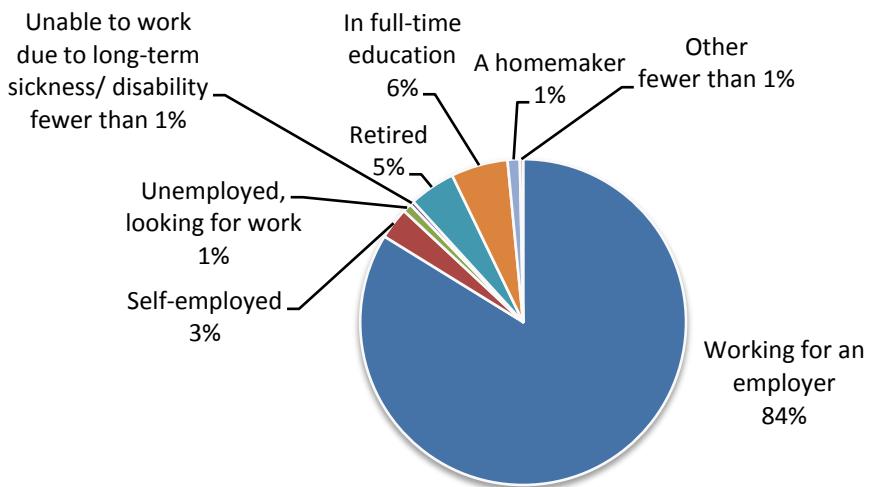


Figure 31⁷

3. In which industry do you work?

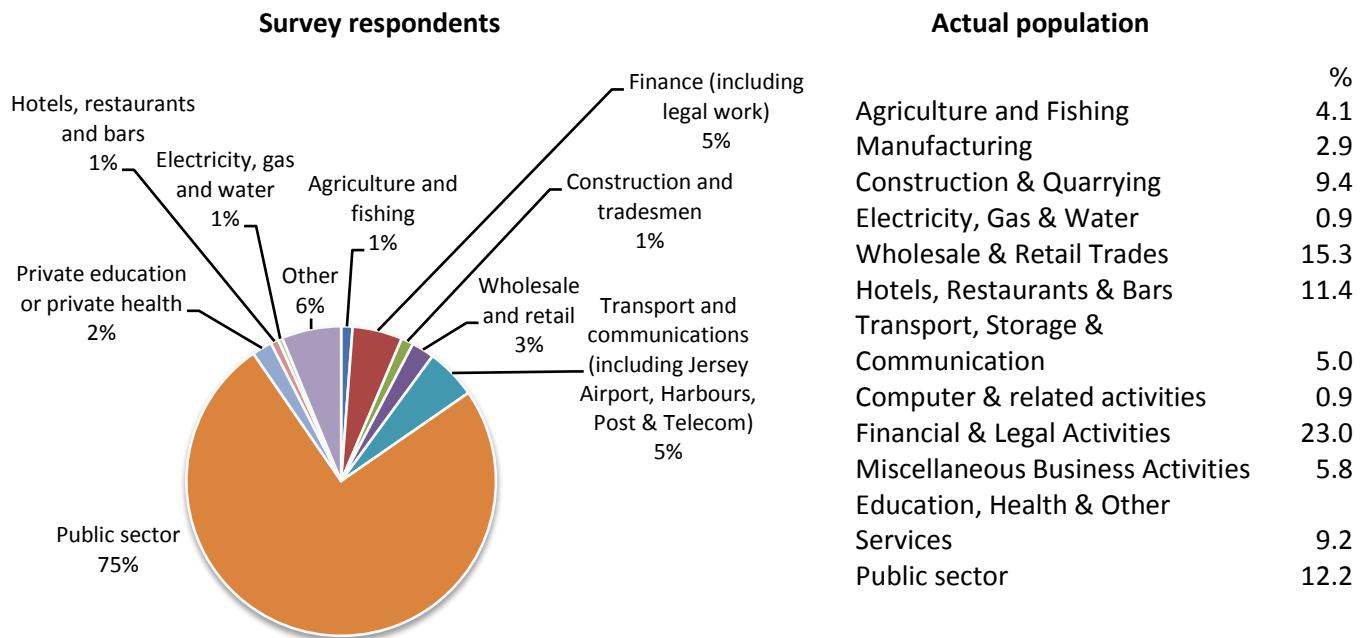


Figure 32

As figure 32 shows, some three-quarters (75%) of respondents to this question were public sector employees. However, the six-monthly Labour Market report shows that only around one in eight of the Jersey workforce (as at June 2007) is engaged in public sector employment. To ensure that the findings presented in this report are not disproportionately skewed towards the views of this subgroup, the responses to questions 11 and 14-17 have been weighted to account for the overall Island profiles of public to private sector workers and of workers to non-workers. Such weighting (post-stratification) ensures that the set of respondents more closely reflects the view of the full population but does not account for any potential bias due to the non-random (i.e. self-selected) nature of the survey design.

⁷ For breakdown of actual population, see Chapter 2, page 11..

4. In which Parish do you live?

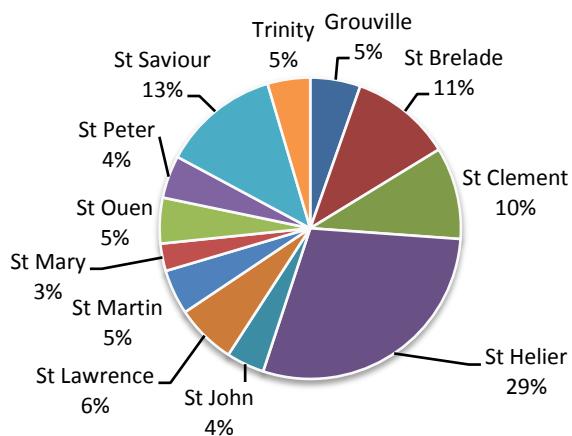


Figure 33⁸

5. How many adults (age 16 or over), including yourself, live in your household? (Excluding lodgers)

0	3%
1	18%
2	50%
3	17%
4	9%
5 or more	3%

6. Of the adults living in your household, how many are pensioners? (Females aged 60 or over and males aged 65 or older)

0	85%
1	9%
2	6%
3	Fewer than 1%
4	0%
5 or more	Fewer than 1%

7. How many children aged 0-15 live in your household?

0	65%
1	20%
2	13%
3	2%
4	Fewer than 1%
5 or more	0

⁸ For breakdown of actual population, see Chapter 2, page 11.

3.2 You and Jersey

8. When did your current period of continuous residence in Jersey begin?

At birth	43%
2000-2007	20%
1990-1999	11%
1980-1989	9%
1970-1979	10%
1960-1969	5%
1945-1959	2%
prior to 1945	Fewer than 1%

9. How long are you planning to live in Jersey?

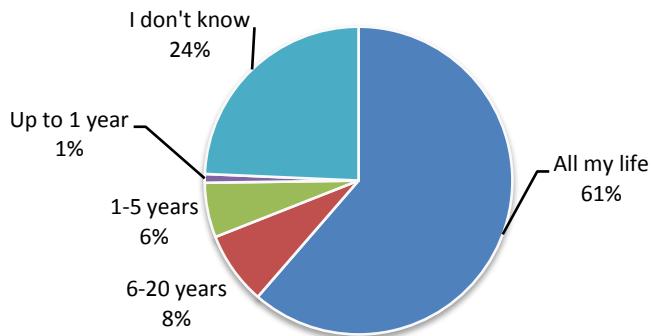


Figure 34

10. If you are not planning to live in Jersey in the long term, why do you expect to leave?⁹

362 people responded to this question. It was clear that many of those who expected to leave the Island in the future regretted having to do so, but felt that leaving would be necessary for one reason or another. Many gave a combination of reasons for wanting to leave, as these quotes illustrate:

“I would expect to live in Jersey long term, probably until the end of my life, unless the conditions of living in the Island become significantly less attractive - particularly if the countryside deteriorates, the population increases much more, the value of the environment is not appreciated, and if life in Jersey for the elderly becomes less practical and enjoyable than somewhere else.”

“Rising costs of the basic necessities of life. Perception of rising crime rates. Frustration at the ‘Let Them Eat Cake’ attitude of senior politicians. Frustration at the lack of electoral

⁹ Note that the responses to this question have not been systematically analysed. The full list of responses has been presented to the States of Jersey alongside this report.

reform. Rising of the underclass. Bleak prospects for my grandchildren. My children will leave - we may follow."

The most common reason given for wanting or expecting to leave was the high cost of living, and in particular the lack of affordable housing in Jersey. Several people were concerned that they would never be able to buy a house in the Island, and rented accommodation was seen by many as overpriced and of poor quality.

"I'm not sure I want to leave. I like the Island and have family over here. However, I have relatives in England and understand that housing is substantially cheaper. I wish to own my own house at some point in my life."

"May be forced to leave due to high cost of living and dim prospect of ever being able to afford buying a house."

"Because it is just too expensive to live here. I will never be able to afford my own home, rent is extremely high."

Several respondents mentioned that they would leave Jersey upon retirement, either to return to their place of birth, to live in a warmer climate, or simply because they could not afford to retire in Jersey due to the high cost of living:

"Jersey is too expensive and inconvenient to live in in retirement."

"Once retired, moving to warmer climates and cheaper cost of living."

"Retirement does not seem to be a feasible option if we stay in Jersey. Pension and cost of living leaves a big gap in affordability. We envisage we would have a poor quality of life, having to penny pinch for basics. Health care in the community is provided by charities mainly, and if the current trend and thinking of politicians catch on, the elderly, which will be a major proportion of the population, will be ghettoed, and thought of as a drain on finances."

Another common reason given for wanting to leave or expecting to have to leave was restricted job prospects and/or limited opportunities for career progression:

"There are very limited choices for work for my children and Jersey law[s] make everything so complicated and difficult to stay."

"[I'm] going away to do further studies and won't be able to come back if there are no jobs in the area in which I will be qualified."

"There are no jobs here I am interested in."

"There is limited scope for career development within my chosen career in Jersey and therefore if I wish to climb the 'career ladder' I will have to move away to find more opportunities. However, I expect that I will return in later life."

Other reasons given for wanting to leave the Island were to be near family abroad, concerns that Jersey is getting overcrowded, concerns about rising crime levels, and dissatisfaction with Jersey's system of government and/or the government's performance. These quotes illustrate the range of responses given:

"To improve lifestyle and be nearer family."

"Too expensive (particularly housing). Too crowded. Too materialistic."

"I will leave when the Island gets anymore crowded and any further building occurs in the countryside or on the edge of urban areas."

"Jersey is expanding too much too quickly and there is a gap between poor and rich [which is] widening more and more."

"Not happy with the way the government is managing (or allegedly managing) the Island and its various facets."

"Jersey is not a proper democracy. We should have one vote per person, i.e. The Clothier Report."

"I am Jersey born and have lived here all my life. Recently it has become more difficult to sustain quality of life for my family due to amongst other things increased living costs (both cost of goods and services and taxation), traffic congestion and pollution and anti social problems caused by widespread drink and drug abuse. Since the onset of the ministerial system of government the States are now out of touch with the people more than ever before and Jersey's unique identity is being eroded. These factors may ultimately lead to my family leaving our home to live elsewhere."

3.3 Your views on life in Jersey today

11. When you think about what you like about living in Jersey, how important is each of the following factors? Please rank them in their order of importance to you (1 = most important, 8 = least important).

- | | |
|------------------------------------|---|
| 1. <i>Work-life balance</i> | 2. <i>The countryside and coastline</i> |
| 3. <i>Employment opportunities</i> | 5. <i>The public services (such as schools, health services and benefits)</i> |
| 4. <i>Safety</i> | 7. <i>Leisure activities</i> |
| 6. <i>The sense of community</i> | |
| 8. <i>The level of taxes</i> | |

The responses to this question have been weighted. See page 51 for more information.

Figure 35 shows the most popular and the least popular responses to this question. Top of the list for what people value most about Jersey life was “countryside and scenery”, followed by “work-life balance”. The option considered least important was “leisure activities” – more than a quarter of respondents gave this option a ranking of 8. The most popular second ranking, not shown in the graph, was “safety” followed by “public services”.

A few respondents pointed out that it was difficult to rank the options given as it is the combination of these factors that make Jersey a special place to live, rather than the individual features. It is therefore important that these findings are read in conjunction with the findings of other sections of the survey. For example, whilst “the sense of community” scored relatively low in the responses to this question, “the community” was one of the recurring responses in question 12 where people were asked to list other things they value about life in Jersey.

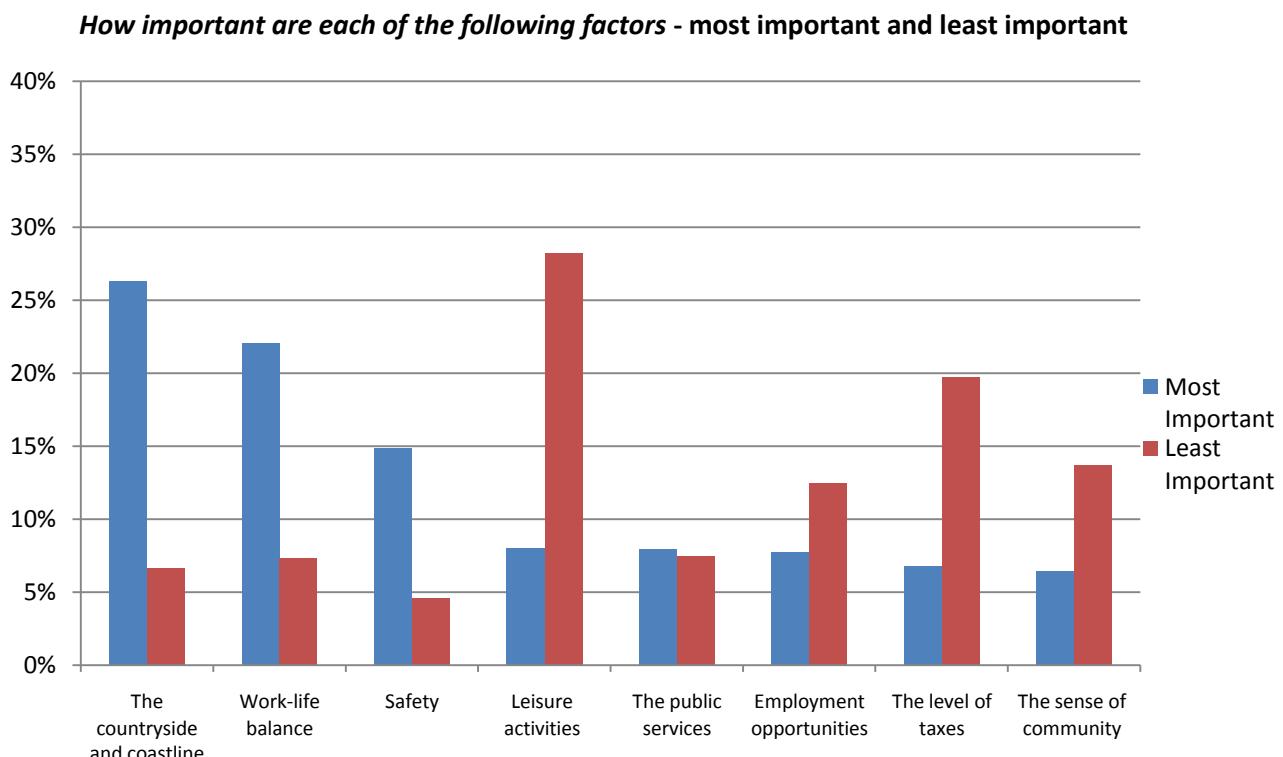


Figure 35

Figure 36 shows the average score for each factor listed in question 11. Scores were calculated using a point system whereby each time an option was ranked 1 it got 8 points, a ranking of 2 got 7 points, etc. The lowest rank of 8 got 1 point.

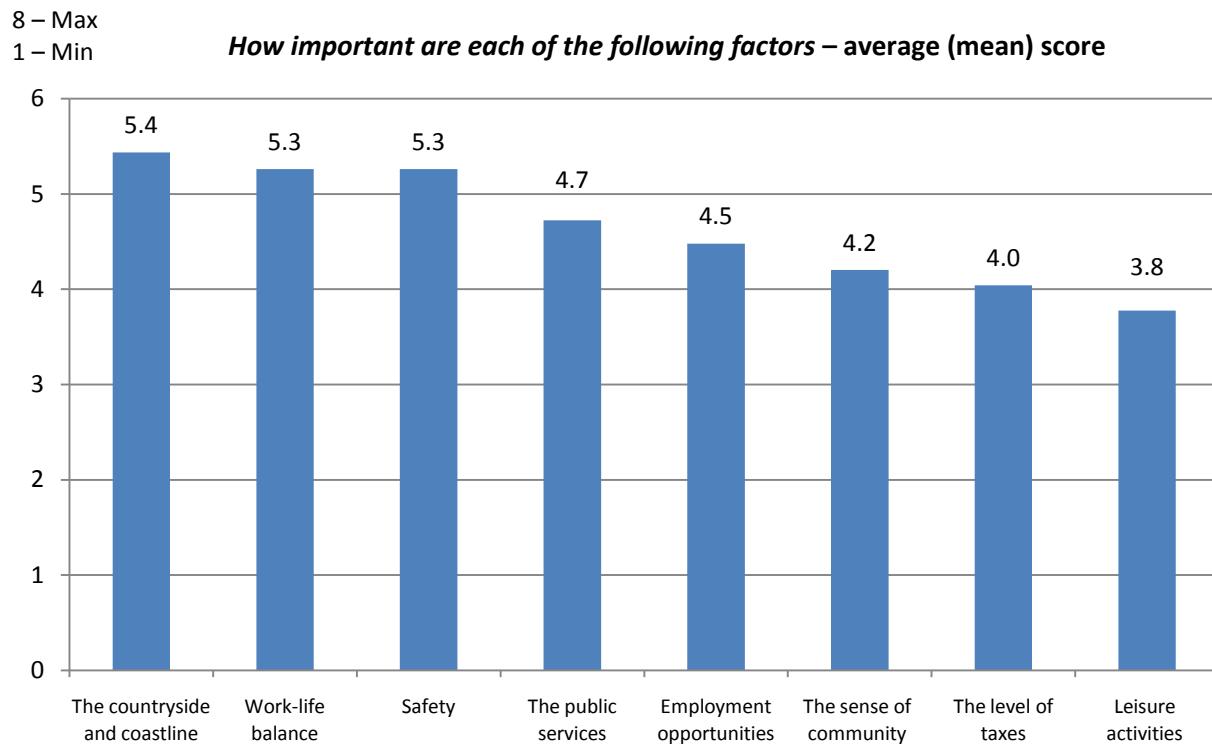


Figure 36

12. What else do you value about living in Jersey?¹⁰

567 people responded to this question. Many made clear that it is the combination of different features that make Jersey a unique place to live, as these quotes illustrate:

“The range of cultural and intellectual opportunities. Climate. Proximity of the man in the street to the top levels of government. As an addendum to 'countryside and coastline': the ability still to find secluded corners. Historical evidence of its past.”

“It is a tiny Island, and yet it tries to keep up and be up to date with the world. The weather is fine, extreme conditions are rare - which I like. Air is fresh, as the sea wind always clears it. Jersey can be both tranquil and busy/cosmopolitan. It sometimes feels like a mixture of a bit of central London with a village.”

“Family and local heritage; deep sense of history; glorious countryside; wide choice of outside pursuits; Zoo; orchid foundation; castles; our own breed of cattle.”

“Family, proximity to France, slow lifestyle, the fact we aren't full members of the EU, the idiosyncrasies, closeness of everything, friends.”

“The heritage, unique identity, the environment, entertainment, leisure and social life opportunities.”

¹⁰ Note that the responses to this question have not been systematically analysed. The full list of responses has been presented to the States of Jersey alongside this report.

The most common individual factors mentioned related to scenery and nature:

"The beauty of the countryside, the north coast, our heritage - both natural and manmade; the charm of the rural part of the Island."

"It is a beautiful Island. You are never far from the wilds of St Ouen's bay, the wooded inland valleys, and the dramatic north coast. The natural beauty of Jersey is what makes it so special."

Many respondents mentioned the proximity of family and friends, or a strong sense of belonging due to family having lived in Jersey for a long time:

"As my family has lived in the Island for at least four hundred years a sense of belonging is one of the things I most value, together with the fact that many of my close relations are also resident. I have been fortunate to spend holidays in a number of beautiful and wide-ranging places in the world but to me Jersey is still the only place where I should like to live."

"I like having a close group of friends and family, all of whom live within a 30 minute drive. I also like the sense of trust which exists in a small community. People don't tend to try to deceive you so much, as you know where they live! The education facilities are excellent, as are most public services."

Others pointed to the kindness of the people of Jersey, the sense of community and the fact that Jersey is a safe and friendly place to bring up children:

"The people and their politeness - as an example, I never wait to pull onto a main road long before someone lets me out. The children are polite, play sports rather than computer games and can hold a conversation with an adult. Shops are shut on a Sunday - in the UK it has become a family day out to go shopping on a Sunday, rather than to the beach, play sport or a walk. People care about where they live."

"Clean safe and wholesome environment for bringing up children."

"The environment is great for families. The education and opportunities for my children are much better than where we used to live."

The unique history and culture of Jersey were also mentioned as positive features by many respondents, as were the slow pace and good quality of life:

"The relaxed culture and slower pace of life you would not get elsewhere."

"The easy going pace of life."

"The quality of life and the variety of cultural activities."

"I am a firm believer in Jersey's distinctive culture; our Island community possesses values of good neighbourliness, inclusive social services and excellence in the public sector that should, and must, be championed. We are different to the UK and we should be confident enough to acknowledge it."

Other popular factors listed were a sense of safety and stability; the ease of access to nature and amenities due to the small size of the Island; the climate; the public services; easy access to the UK and Europe; good food and restaurants; easy access to government and political representatives.

Some of those who responded added a note of caution to their praise of life in Jersey, displaying a concern over the changes that are seen to be happening in the Island and a fear that the things they most value may be about to disappear:

“On the whole it is the quality of life and the fact that, despite its small size, we are still fortunate enough to have areas of excellent natural beauty where we can still find and value peace, solace and inspiration. However, it is imperative that Jersey retains its natural character - once this has disappeared, our quality of life and all its associated feel-good factors will undoubtedly evaporate with it.”

“I value most the sense of community and the open countryside - do not take that from us!”

The full list of responses has been presented to the States of Jersey alongside this report.

13. If there were anything you could change about life in Jersey, what would it be?¹¹

916 people responded to this question. Their answers echo the main issues and themes that emerged elsewhere in the survey. There is a particularly strong overlap with the answers from question 10 where people were asked to explain why they expect to leave Jersey in the future. Many of the comments display a sense of pride and protectiveness towards Jersey and a concern with improving governance, infrastructure and improving life opportunities for the young and poor. Some of the recurring issues raised were:

Controlling the size of the population:

“The Island is at saturation point in terms of population right now.”

“I would wish to change the trend towards creating a larger population as is being done at present. I feel that inward migration should be more tightly controlled and that only people with skills which we require should be allowed in.”

Reducing the cost of living:

“Lower cost of everyday essentials such as milk and bread, etc.”

“Overall life in Jersey is very expensive; a supermarket or shop in England is much cheaper than buying the same items in Jersey.”

“The cost of living, especially when the GST is introduced and the cost of getting off the Island!”

Transport:

“Sort out the growing transport problems, [there are] lots of cars on the roads. How much more development can Jersey take!”

“Cheaper travel on the Island.”

“cheaper air links to UK and abroad”

¹¹ Note that the responses to this question have not been systematically analysed. The full list of responses has been presented to the States of Jersey alongside this report.

Housing (particularly for young people):

"The fact that it is so difficult for a first time buyer to purchase a house in Jersey, but I also understand the value of the countryside and therefore think that building into the countryside is hopefully an avoidable inevitability."

"Stop building new houses, flats and apartments (and offices) – leave some greenery."

Lack of opportunities and activities for young people:

"More opportunities for young people. We currently encourage them to leave the Island and do little to encourage their return. Grant aided education should be linked to job opportunities in the Island. Young people should be given more opportunity to buy property."

"More fun things to do."

Political climate:

'Political life – establish political party politics as having so many individuals mitigates against long term planning and funding cycles for government departments that allow incremental progress (at least 3-5 year budgets)."

"Politicians trying to act like they run big countries – they need to listen to the community more if they want more support from them."

"That politicians listen to and prioritise the young people of the Island, be it school children or those returning from higher education. They are the future and often feel that their voices are not heard and their opinions don't matter."

Independence of Jersey:

"I would start to reject the policy of always looking to the UK and other countries in supplying so-called professionals and experts to advise the States on the way ahead. In actual fact we have all the expertise we need right here in the Island and we could then return to doing things the Jersey way, which was so unique and retained the character of the Island. We now seem to be an offshoot of the UK."

"Keep the UK out of our affairs."

The full list of responses has been presented to the States of Jersey alongside this report.

3.4 What should our priorities be?

14. If you had to choose just three of these priorities for the government to focus on over the next few years, which would you choose?

- **Protecting our green areas from new buildings**
- **Ensuring availability and quality of housing**
- **Protecting the environment**
- **Maintaining a healthy economy (e.g. job opportunities)**
- **Maintaining high levels of public services in health, social services and benefits**
- **Maintaining Jersey's low-tax system**
- **Controlling the population level**
- **Other (please specify)**

The responses to this question have been weighted. See page 51 for more information.

Figure 37 shows what respondents wanted the government to prioritise for the next few years. Each respondent could choose up to three priorities. Top of the list was “protecting green areas from new buildings”, followed by “controlling the population level”. “Maintaining a healthy economy” and “maintaining Jersey’s low-tax system” were in third and fourth place respectively. “Maintaining high levels of public services” was the fifth most popular option. At the bottom end was “ensuring availability and quality of housing”.

Again, these findings should be read in conjunction with the results of other sections of the survey, such as question 11 where the “coastline and scenery” was deemed the most valued aspect of Jersey life, and question 10 where the lack of affordable housing was the most common reason people gave for expecting to leave Jersey in the future.

69 respondents chose the option “other” and suggested alternative priority areas. Frequently mentioned among the suggestions were protecting the coastline and scenery as well as providing good quality and affordable housing, in particular for first-time buyers. Other recurring suggestions were electoral reform, reform and/or shrinking of the civil service and more support for families in the form of benefits, affordable housing and/or better maternity leave.

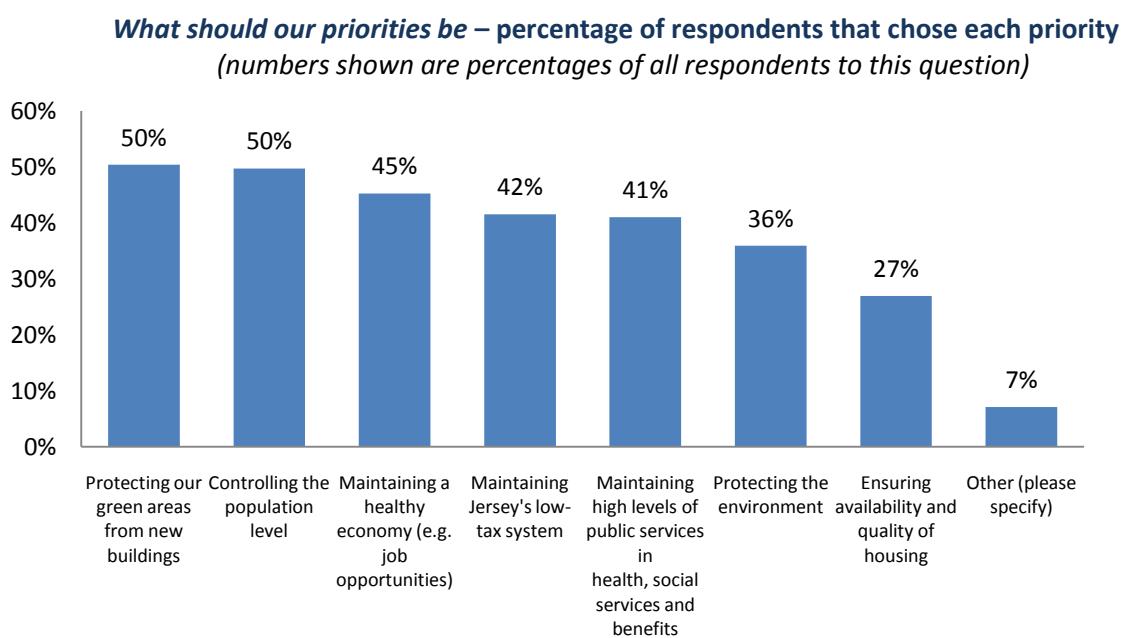


Figure 37

15. The States are looking at a range of options for managing the effects of the Island's ageing society. Please rank these four options in your order of preference (1 = most acceptable, 4 = least acceptable). Growing the economy, increasing the profits of businesses and the earnings of employees

- **Working longer (raising the state pension age) to boost the working population and the economy**
- **The resident population pays more (e.g. raising taxes and/or social security contributions)**
- **Allowing more people to come to live and work in Jersey**

The responses to this question have been weighted. See page 51 for more information.

Figure 38 illustrates which of the policy options given in the question were deemed to be the most and least acceptable by survey respondents. About three fifths (61%) of respondents considered “growing the economy” to be the most acceptable option, whilst half (50%) gave “allowing more people to live in Jersey” a rank of 4, the least acceptable option.

Please rank the four options - most acceptable and least acceptable
(numbers shown are percentages of all respondents to this question)

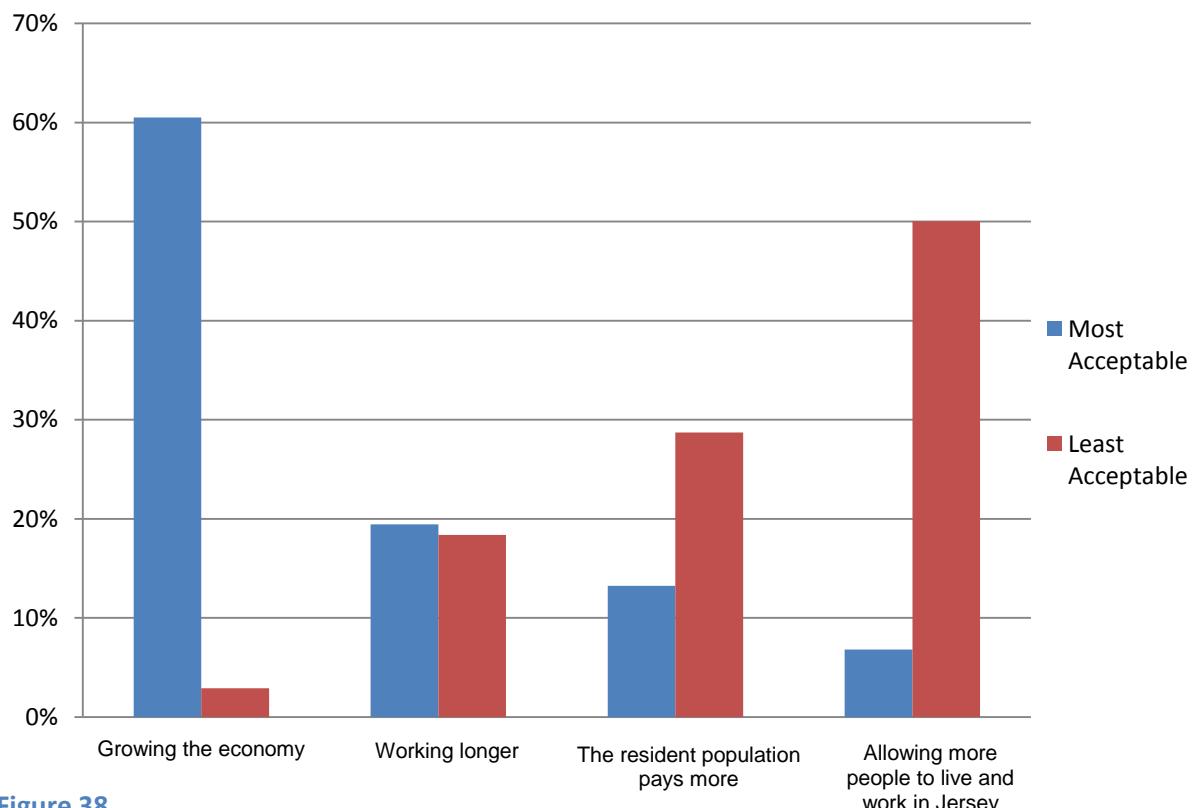


Figure 38

Figure 39 shows the average score for each option. Scores were calculated using a point system whereby each time an option was ranked 1 it got 4 points, a ranking of 2 got 3 points, a ranking of 3 got 2 points and a ranking of 4 got 1 point.

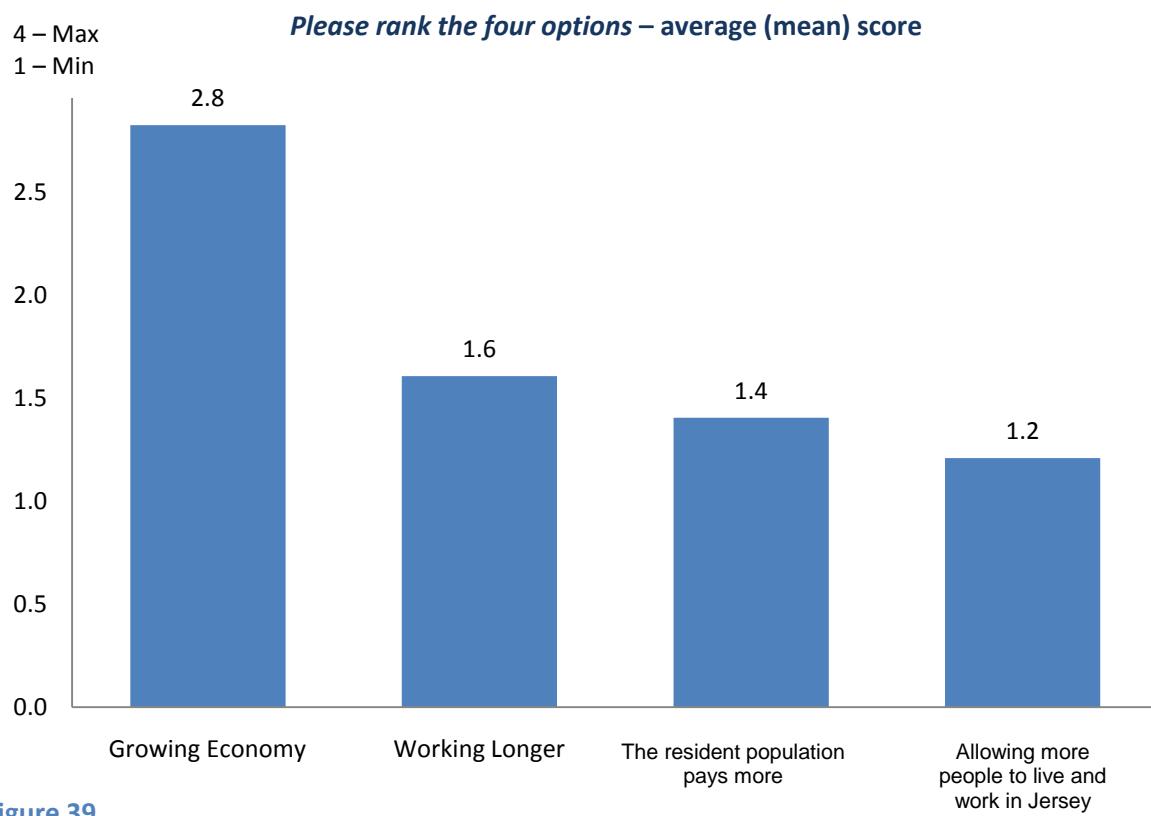


Figure 39

3.5 How will we live in the future?

16. In the future it is likely that more houses will need to be built in Jersey, whether to accommodate elderly people living alone, or for people who move here to live and work. How do you feel about each of these possible options for housing?

- *Building higher density residential developments in town, e.g. apartment complexes*
- *Creating higher density suburban centres (with work and residential areas) on the edge of town*
- *Building a new village or expanding an existing village*
- *Building new homes on greenfield land on the edge of existing developed areas*

The responses to this question have been weighted. See page 51 for more information.

Questions 16 and 17 measured the respondents' preferences regarding the options for building new housing in future. In both questions, "building higher density residential developments in town" was the most popular option. The next most popular option in the top categories ("strongly in favour" and "most acceptable") was "building a new village or expanding an existing village".

However, when the scores were added up there was some discrepancy between the two questions. In question 16, "creating higher density suburban centres" got a higher average score than the village option (figure 41), whereas in question 17, "building a new village or expanding an existing village" came in second place and "creating higher density suburban centres" came third (figure 42, page 66).

The least popular choice in both questions was "building new homes on greenfield land". 68% were against or strongly against this option.

It should be noted that about a sixth and a fifth of respondents, respectively, skipped the two questions about housing. This may reflect that respondents did not feel sufficiently informed about the options provided to make a judgement, or that they were unhappy with how the questions were posed. It may also mean that they did not agree with the proposal to allow more people to settle in Jersey, and were therefore not willing to comment on plans for where new houses should be built. The responses to question 18 (shown on page 67) suggest that many respondents saw future housing needs as intrinsically linked to inward migration, and therefore believed that capping the population would eliminate the need to build more houses.

16. How do you feel about these options for housing – strongly in favour and strongly against
 (numbers shown are percentages of all respondents to this question)

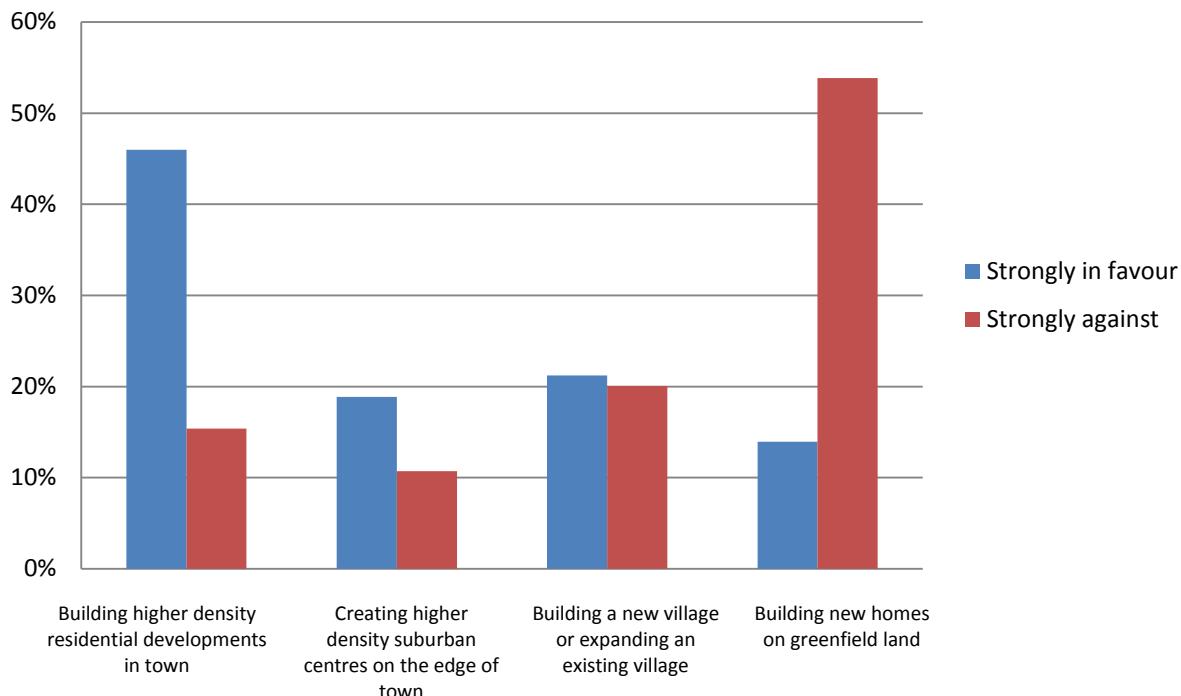


Figure 40

Figure 40 shows the average score for each option. Scores were calculated using a point system whereby “strongly in favour” gave 3 points, “in favour” gave 2 points, “slightly in favour” gave 1 point, “slightly against” gave -1 point, “against” gave -2 points, and “strongly against” gave -3 points.

Here, the 1.1 mean values given to the first two options imply “slightly in favour” overall. A mean value of 0.7 for “building a new village or expanding an existing village” indicates that more respondents were in favour than against. Similarly, the mean value of -0.6 for “building on greenfield land” means that more respondents were against this option than were in favour.

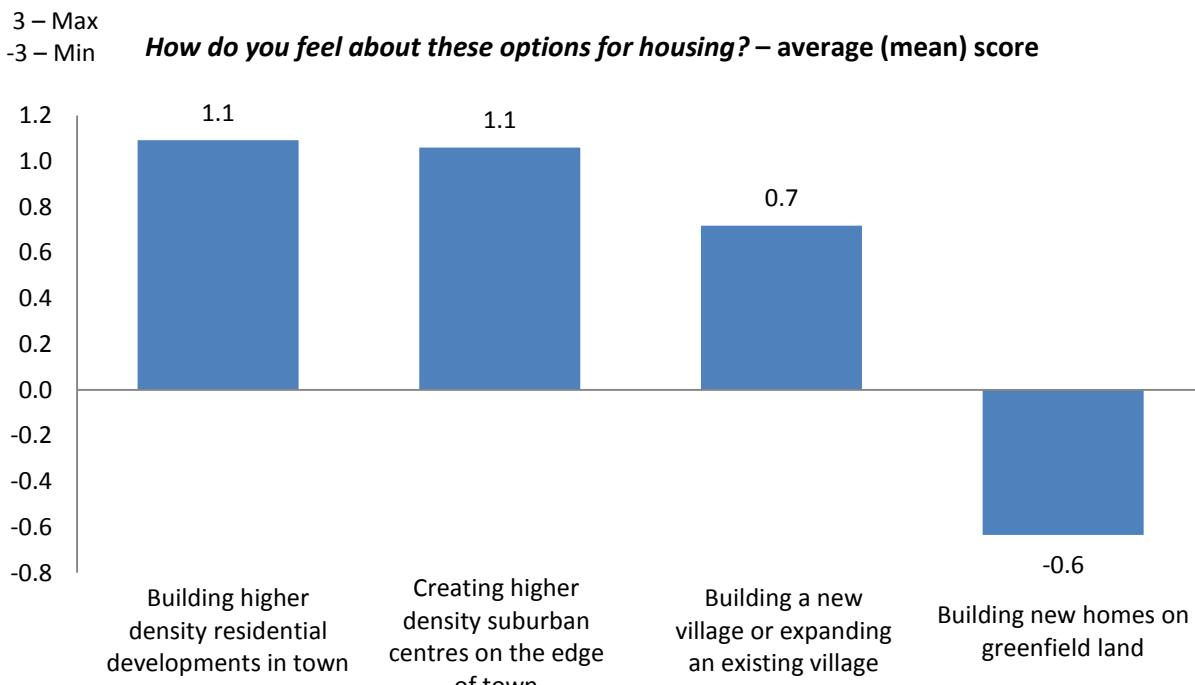


Figure 41

**17. Looking at the same four options for housing, please rank them in your order of preference.
(1 = most acceptable, 4 = least acceptable)**

The responses to this question have been weighted. See page 51 for more information.

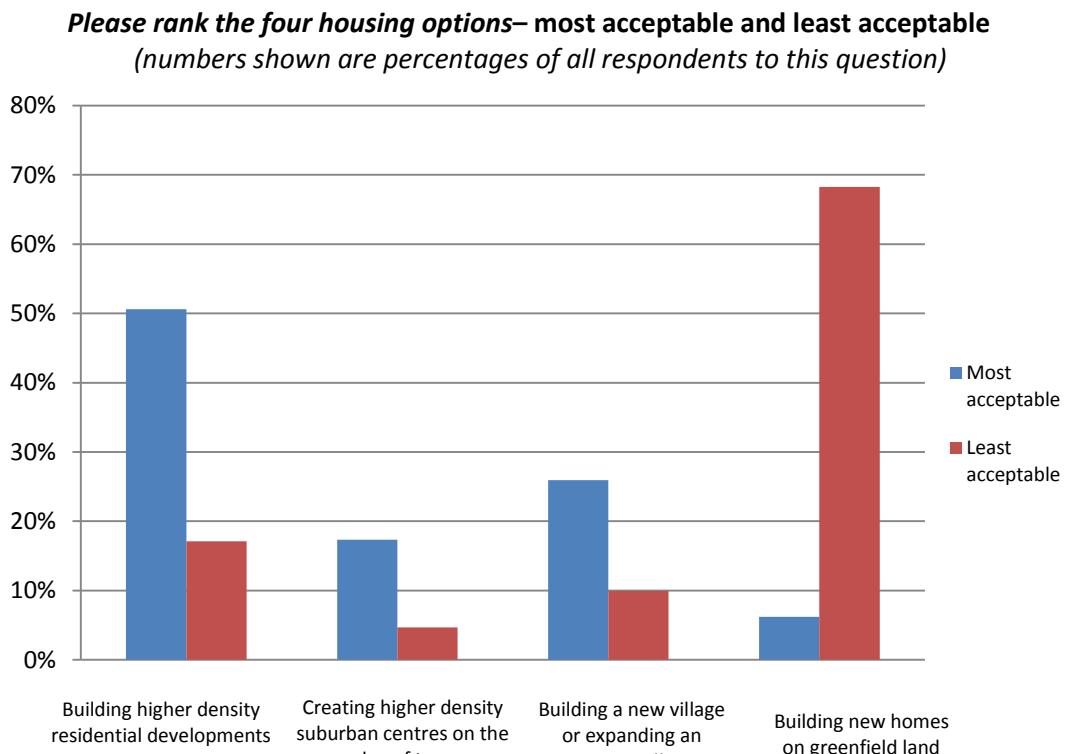


Figure 42

Figure 42 shows the average score for each option. Scores were calculated using a point system whereby each time an option was ranked 1 it got 4 points, a ranking of 2 got 3 points, a ranking of 3 got 2 points and a ranking of 4 got 1 point.

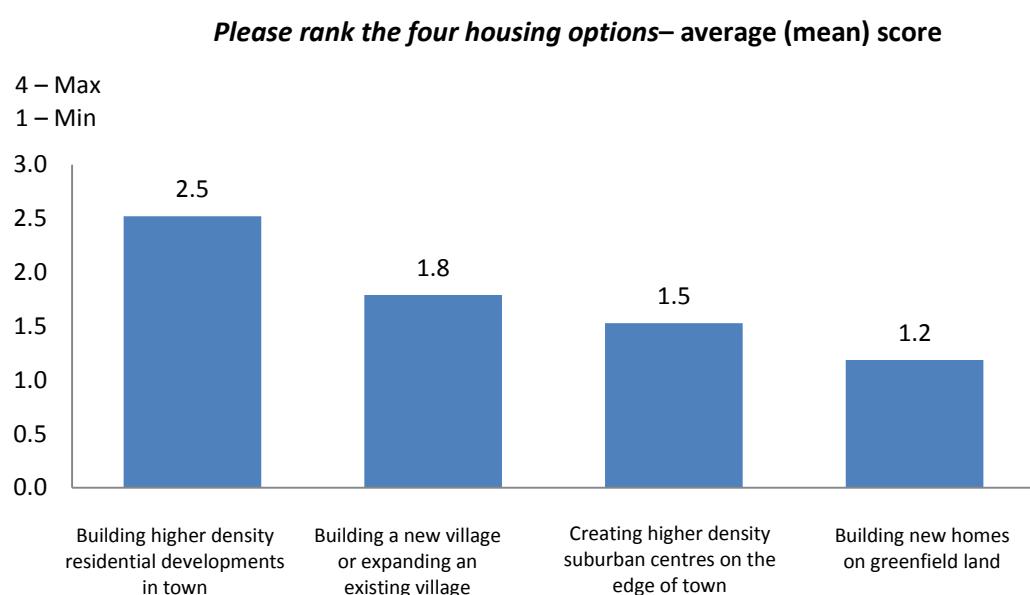


Figure 43

18. Can you think of any other options for housing more people in future?¹²

There were 457 responses to this question. A recurring suggestion was to make use of existing office buildings, warehouses and other commercial buildings that currently stand empty. Some respondents also suggested that planning permission for new commercial buildings should require a residential element.

“Turn some of the empty offices and shops in town into housing and stop building more offices many of which remain empty for years.”

“Planning permission for commercial buildings – i.e. offices, shops, hotels, etc, to include living accommodation for staff or private use.”

“Encourage all building of shops/offices to include an element of housing on their upper floors.”

Some respondents favoured making use of Jersey’s coastline by reclaiming more land, allowing people to live on moored boats or creating artificial Islands off Jersey to host residential buildings. Others called for improved transport links to France, either by bridge, affordable ferry services or an underground tunnel, thus allowing people to live in France and commute to Jersey for work.

“Reclaiming more land to the South of the Island. Develop better transport links with France and encourage people to live there and commute to the Island.”

Many respondents called for incentives to encourage retired people and people without children to move into smaller accommodation, thus freeing up larger houses for families. Some also suggested that more emphasis should be placed on building high-rises, terraced houses and apartment blocks rather than detached houses, which take up more space.

“There are a lot of adults living in very large houses, me included. Could there be some sort of incentive for these people to live in smaller accommodation and let the larger family have the larger houses?”

“Providing opportunities for people to downsize from large family homes into 2 bedroom sheltered or life-long homes, this will help to recycle family homes back into the market and reduce the need for new build family homes.”

“More people have to be encouraged to live in family sized apartments, 3-5 bedrooms, 6-8 levels high, each designed to look nice and provide each dwelling with some private out door space. Houses are a luxury the Island cannot afford. Plus, continue with the policy of encouraging people to down size into smaller apartments when family left home.”

However, others were fiercely opposed to any new apartment blocks and high-rises being built, often for aesthetic reasons. There were also concerns that new apartment buildings have not been built to sufficiently high standards. Many respondents called for high-quality, family-size accommodation to be prioritised.

“Bring an end to high-rise sixties style blocks of poorly constructed, anti-social and ugly housing!”

¹² Note that the responses to this question have not been systematically analysed. The full list of responses has been presented to the States of Jersey alongside this report.

"If we do build town based apartments, it's important that they are built to a higher spec than current new flats, which are not a real alternative to houses because they are too small. Basically they need to be more like European family size apartments."

Many of those who completed the survey used this space to call for stricter inward migration controls, arguing that if fewer people were allowed to settle in Jersey more housing may not be needed, as these quotes illustrate:

"Control the number of people coming in and you will not have to build so much."

"The number of people living in the Island must be capped allowing unrestricted numbers of people to live here is not the way forward. It has already inflated the price of local housing beyond the means of local young people. Building more homes is not going to solve the problem if they can only be afforded by immigrant workers."

"Control population by a 'Green Card' type of system. There are too many 'J' category coming into the Island and being allowed to purchase property. They should be living in the Island for a period of say 5 years before being allowed to buy. The current system is creating a housing shortage & forcing prices up."

The full list of responses has been presented to the States of Jersey alongside this report.

19. Do you have any more thoughts on the future of Jersey? Are there crucial issues that we have missed?¹³

This question had 489 responses, many of which raise important and useful points and suggestions for the States of Jersey to consider. The topics covered in these comments ranged from public transport and road congestion to sustainable economic growth, government reform, the nature of public consultations (including this one) and alternative proposals for how the states may meet the economic challenges ahead.

The full list of comments has been presented to the States of Jersey alongside this report.

¹³ Note that the responses to this question have not been systematically analysed. The full list of responses has been presented to the States of Jersey alongside this report.

4. Summary of Written Responses

By Tom Le Feuvre, Chief Ministers Department, States of Jersey

This chapter summarises the views expressed in written responses received by the Chief Minister's Department as part of the Imagine Jersey 2035 public consultation.

Members of the public were invited to submit their comments in relation to the Imagine Jersey 2035 public consultation either by post to the Communications Unit at Cyril Le Marquand House or by sending an email to the dedicated email address: imagine@gov.je. This stage of the consultation process was held between 20 November 2007 and 8 February 2008.

A total of 35 written responses were received from individuals, groups, representative bodies and/or companies by the closing date. A majority of the responses were received electronically.

A number of respondents made specific recommendations linked to the five scenarios outlined in the consultation guide. Most submissions received, however, were broad in approach and did not focus on a single issue.

In this summary responses have been grouped thematically; the themes are presented in order of precedence from the highest number of times they were raised to the lowest. Representative views have been included where appropriate.

Role of scrutiny

The Chief Minister's Department has co-operated fully with the Corporate Services Scrutiny Panel and has provided all requested information. Copies of all written responses received by the Chief Minister's Department as part of the Imagine Jersey 2035 public consultation have been forwarded to the Scrutiny Panel for information.

All responses were submitted to the Panel on an anonymous basis.

4.1 Summary of responses

Environment

The largest number of responses concerned preserving Jersey's environment. Protecting green areas from new buildings was considered of particular importance. The following representative comments were made:

"Jersey's natural environment is priceless and is THE greatest asset we can pass onto our children and our children's children."

"Whatever we do I feel the numbers in Jersey are bound to rise and unless we are careful, this is bound to result in a reduction in the open countryside for which Jersey is rightly famous."

Several respondents linked the issue of protecting green areas with the need to develop existing urban areas more intensively. This issue is related to the theme of 'Housing', which is covered separately later in this summary. The following submissions were received:

"Intrusion into Greenfield areas must be resisted, forcing acceptance of the flat dwelling culture."

"No building on Greenfields."

"If any new properties are required these should be built in town. This will protect the countryside and will have less impact on traffic, therefore alleviating pollution."

"Now that countryside is under development threat there is a real invigorated urgency to reinforce development directive in St Helier first!"

Only one respondent focussed on the implementation of policies designed to protect Jersey's environment, stating that: *"This exercise may require more staff at Planning & Environment".*

Migration

The topic of allowing more people to come to live and work in Jersey generated the second highest number of responses. Several respondents made specific recommendations linked to the five scenarios outlined in the consultation guide:

"...Scenario Two would be the best course of action, on the assumption that there will be careful monitoring at all times and that adjustments will be made if and when necessary...The Island could withstand a population increase to 92,250 over 27 years."

"Scenario 2: This is the option I prefer: raising the retirement age and allowing limited, tightly managed, inward migration."

"Of your given scenarios, my preference is Option 1. (No further migration)."

"We believe that the absolute limit on inward migration should be 250 heads of household per year because the environment must be protected."

A considerable proportion of the responses received expressed the view that further inward migration into the Island should be avoided, with some stating that it should be stopped entirely. The following representative comments were made:

"...the route to greater financial stability need not involve further inward migration."

"I think that at all costs we need to avoid any further increase in population. The Island is already overcrowded...population growth cannot continue."

"More immigrants will increase pressure on all resources."

"I am strongly against inward migration as a solution given the increasing burdens on the Island."

"I believe that any level of commitment to pursue population growth will in the long run completely undermine these commitments [in the States Strategic Plan] and we will create a Hong Kong environment."

However, this was not a universal view. Several respondents offered opinions in favour of increased inward migration. In its submission to the Chief Minister's Department, the Jersey Chamber of Commerce argued that: "*The quality of migrants improves the population mix.*" Another respondent stated that: "*The population of Jersey will have to grow to support pensionable non working people in order to maintain the ratio required for growth and taxation in the future.*"

Several submissions expressed the concern that inward migration would impact negatively on employment opportunities for Jersey residents. The following representative comments have been included:

"For years you have employed & promoted people from outside the Island before looking after (y) our own."

"The reliance on importing skilled people to do certain jobs in Jersey is really because the States have not planned and trained their own population successfully."

"I want to support the career of every young person in Jersey to avoid them leaving and being replaced by immigrants."

By contrast, another respondent suggested that the Island may suffer from an inability to attract sufficient levels of inward migration: "*Whilst immigrant workers can make a valuable contribution to our society, Jersey should always be ready for them to prefer to live elsewhere – they follow the money!*"

Pensions

The question of encouraging people to work longer by raising the state pension age attracted the third highest number of responses. Several respondents were of the opinion that the age at which the state pension is payable should be raised, although there was some variation in terms of the particular age at which it should be set:

"No pension should be payable before the age of 70, and it is possible to envisage 71, 72 or even older, before any state pension be payable. Grasp the nettle now, and stop fiddling about."

"Those that wish to retire early can, but why should the state with a limited budget support them, if they have private or company schemes fine, the state pension can kick in latter say at 70 otherwise we have to keep working to fund those ever extending "non productive" years..."

"We would favour raising the pensionable age by three years to 68."

However, this was not a universal view. Several respondents argued against a fixed age at which a state pension is payable in favour of a more flexible approach:

"Adopt a floating retirement age depending on choice and health. The retirement package would be adjusted according to the individual and his/her contributions."

"I believe all pensions should actually start at 60. BUT, if people choose to work on, they need not take that pension. They are earning, paying ITIS and should continue to contribute to the State OAP Pot. Then the State Pension, that they eventually receive, should have increased year by year indefinitely until they finally retired, at which time it would become fixed, subject to the Inflation increase."

One respondent felt that: "*It should become compulsory to have a private pension.*" This view was supported in another submission, which suggested that: "*this could be introduced in a phased manner and would over time eliminate the need for pension contributions to be met from social security.*"

Employment

The issue of employment attracted the fourth highest number of responses. Encouraging greater participation amongst Jersey's workforce and extending the length of the average working life were considered key issues by several respondents. These topics are closely related to the issue of 'Pensions'; a representative selection of comments has been included:

"There [is] a willingness to accept the need for a longer working life and paying greater taxes."

"By keeping active and involved, whether it be in schools, hospitals, leisure activities, community projects etc. the mature population is contributing to society and not a burden."

"Working longer by encouraging experienced retirees to continue part time enables training apprentices 'on the job.'"

"There really is only one answer, which, although we may not like it, is we have to work longer!"

"We favour part-time work for people of pensionable age because this would increase contribution to the economy, slightly reduce the need for inward migration and, in many cases, make people happier."

A considerable proportion of submissions highlighted concerns about the need to challenge popular perceptions surrounding the role of older people in society, especially in relation to attitudes towards retirement. The following representative comments were received:

"...it is a change in attitudes towards 'work' and retirement that is required if we are to imagine Jersey in 2035 as a society where the 'ageing' population is not seen as a burden."

"One of Jersey's current difficulties is that the Culture of the Young is so 'defensive'...Rather than bring in experience from overseas, the Culture needs to change to bring back the Oldies...Many of these are Jersey-born folk, who have great world experience already. At the moment, after trying vainly to get an Interview a few times, they just give up. They need to be encouraged."

"...the older members of our community should be seen as an available resource, which, with a little encouragement by government, could even become a net economic contributor group, rather than simply a drain on the Island's economic resources. An example should be set by the public sector itself."

Reliability

Almost one third of comments received raised the subject of the reliability of the consultation process. Wherever possible, respondents were provided with additional information by the Chief Minister's Department. However, some submissions articulated concerns about the overall validity of the consultation process, doubts about the reliability of the information provided and uncertainty about the outcomes of the Imagine Jersey 2035 consultation.

A number of the responses received expressed a lack of confidence in the consultation process as a whole:

"The options you display, in reality, do not exist."

"As usual though with this Government, we are not being given the whole story. We have been made aware of the extra housing that will be needed and the effect on our water supply (only by a letter in last weeks JEP). But what else will be affected by an increase in population?"

"It would appear that either there is a predetermined policy to grow Jersey's population, or that there are some major flaws in the thinking of the Officer Working Group."

"I could not help feeling that the whole meeting, with the senior Civil Servants dominating proceedings, was rather like the Russian Ballet I saw the same evening; a charming spectacle."

However, these views were not universal. Several respondents offered a more positive opinion of the Imagine Jersey 2035 consultation. The following representative comments were made:

"Having studied carefully your pamphlet 'Imagine Jersey 2035' I must say how impressed I am that the future problems facing the Island over the next 27 years...are being given such careful thought at this early stage."

"I thought that this consultation document was very accessible and I like having the Scenarios to compare with each other."

"Personally I have every confidence in States members listening to local opinions and gaining the views of how the problem is being tackled elsewhere."

A number of respondents raised particular concerns about the reliability of the data and statistical information that had been presented in the consultation guide. The following comments are representative of these submissions:

"Without a real census, the current figures for the population are insecure."

"Implement I.D. cards...There are otherwise too many assumptions being made for some very important matters. Only when we have a detailed and full picture of the relative demographic will be able to properly quantify and plan to address the challenges that lay before us."

"In my view the consultation paper lacks detail, does not provide analysis of the assumptions made in reaching the various scenarios contemplated and fails to consider a wider range of options."

One respondent suggested that the issue of the ageing population may prove less serious than expected: *"There is, of course, also the possibility that the anticipated fall in tax revenues has been overestimated. We have seen several other examples over recent years to show that such projections, even over a much shorter time period, can be wrong."*

Another submission expressed the concern that the terminology used in the consultation document had caused confusion: *"...the whole debate around population and the policy options being discussed should be conducted with reference to the resulting total population living in the Island, and not in terms of 'migration' or 'inward migration' which are inherently confusing... The confusion serves to muddy the debate."*

Housing

Over a quarter of the comments received during the consultation raised the issue of ensuring availability and quality of housing. The vast majority of respondents voiced a strong preference for building higher density residential developments in town as opposed to building new homes on Greenfield land. The following representative comments were made:

"Urban flat dwelling must be encouraged and development in current Greenfield and country areas very strictly limited."

"Could we not accommodate more people in high rise buildings, particularly those requiring assistance from the States?"

"If any new properties are required these should be built in town. This will protect the countryside and will have less impact on traffic, therefore alleviating pollution."

"New developments in areas of outstanding natural beauty, green and agricultural priority zones should be completely illegal. We must exhaust urban and brown-field sites first."

A considerable number of respondents focussed on the issue of meeting the particular housing requirements of an ageing population. Several submissions raised concerns about the financial considerations of housing elderly residents and the need to make down-sizing, home-sharing, and other means of allowing older people to remain in their homes, more attractive and realistic as potential options. The following representative comments have been included:

"If housing prices and the cost of living were not so high then families could afford to bring Granddad or Grandma home to live with them, like they used to. But who can afford an extra £100,000 on the mortgage for another bedroom?"

"Intergenerational home design should also be considered and viewed upon as a 'saving' rather than a private sector luxury."

"Facilitate and incentivise down-sizing, raise the profile of the issue...Promote home sharing among elderly...this brings the dual benefit of reduced dependence on nursing care."

"Can we also provide modern homes that allow the elderly to stay in their homes?"

Economy

Over a quarter of respondents expressed opinions about the future of the Island's economy. A considerable proportion of the comments received were in favour of further economic growth; some representative examples have been included below:

"It is essential to grow the finance sector because the yield per capita is much greater than any other sector...Growing the economy requires trade union cooperation with privatisation to achieve significant improvement in productivity...It can be done."

"...growth should be allowed through reduced bureaucracy, transfer of functions to the private sector, a larger indigenous workforce...and encouragement of high value-added enterprise."

"...the Island's economy should be encouraged to grow, but this must be done without recourse to the easy option of simply increasing the labour force by inward migration."

A number of respondents argued in favour of greater diversification of Jersey's economy as a means of both pursuing growth and also decreasing dependency on the finance industry. The following suggestions are representative of these comments:

"We have to be pleased that we have the finance 'industry'...at the same time the all-the-eggs-in-the-one-basket principle applies, and development elsewhere – other applications of IT, seafood farms, export of locally-made goods, Tourism – should be encouraged."

"Develop and diversify the economy...inward migration per se is not pre-requisite – selecting lucrative industries and fostering innovation will make the most difference. As an example: Pharmaceuticals / development / research are low footprint industries, robust intellectual property laws will play a part."

"I.T. is making it easier for people and businesses, in far-flung locations, to communicate and do business to international standards...This trend poses advantages for Jersey people to remain on the Island where people like myself had no option than to leave to progress their skills, interests and career...Jersey 2035 should be committed to improving technology access and fostering innovation teaching and learning methods."

However, these views were not universally accepted. Several respondents argued strongly against further economic growth:

"Growth is one fiscal formula that capitalists feel comfortable with. Jersey could still survive if we radicalised the economic culture, adopting a more protective 'small is beautiful' system."

"...we should be very sceptical of solutions which are implicitly based on the idea that 'more' = 'better'"

Taxes

One fifth of the comments that were received as part of this consultation related to levels of taxation. The vast majority of submissions were in favour of encouraging the resident population to pay more, either through raising taxes and/or social security contributions, in order to help prepare for the future. The following representative comments were made:

"The second option would be increasing G.S.T. provided that there were certain exemptions such as food, children's clothing etc."

"Should people...pay more for their public services? Yes. This should be as far as necessary to meet the need and assuming the public services are not 'Rolls Royce' standard for the sake of it."

"Given the overall impact on the economy of the ageing population...it may be that some additional taxation would also be required."

"Consider taking the 'cap' off Social Security contributions...the higher value jobs would contribute more, and since a proportion is contributed by the employer, it may partly offset corporate tax losses."

"I think the cap on Social Security should be removed."

A number of respondents, however, argued that increased taxation should only be introduced under certain conditions. The following suggestions are representative of these comments:

"There are options for some increases in taxation, but these will not be acceptable until such time as government has shown a determination to control expenditure"

" We would support paying more in income tax as long as the finance industry is not adversely affected...We would support a higher rate of GST as everyone then contributes and the Income Support scheme protects those in need."

Other

A considerable number of the comments received cannot be easily categorised within the policy options outlined in the Imagine Jersey 2035 consultation documents. These suggestions have, therefore, been grouped thematically and included at the end of this summary.

A considerable number of respondents highlighted the importance of using Jersey's Parish system to help prepare for the future. The following representative comments were received:

"I would advocate that the Parishes, Churches and the voluntary sector are better placed to deal with the practicalities of an ageing society and the role of the States would be to ensure that what the people entrust them to govern, they do so wisely."

"It is worth looking back to a time when...Parishes, Churches and private organisations fulfilled a much more personalised role in the community...to the extent that Parish Officers know their claimants and the really needy through the honorary police."

Several submissions emphasised the need to provide better opportunities for young Islanders as a means of addressing the issue of the ageing population by encouraging more young people to live and work in Jersey:

"Young Jersey people are leaving the Island in droves due to high property prices and not being able to find jobs that they are qualified for. Can we not try and set up schemes to encourage these young people to stay i.e. better career advice."

"There should be increased emphasis on vocational courses for non-academic children from the age of 14 – especially for boys. Consideration should be given to devoting a school entirely to vocational skills...More apprenticeships are needed so that local youngsters can fill some of the jobs that immigrants come in to do."

A number of respondents expressed support for land reclamation and redevelopment schemes as part of any plans to prepare for the future. One respondent expressed the opinion that: "*Land reclamation schemes need to be looked at.*" Another submission was more specific, focussing on the La Collette site in particular: "*La Collette...alone could accommodate Jersey's 2035 estimated Residential, Commercial and Retail needs many times over... Further more the community development of La Collette will avoid having to extend St Helier into the surrounding Parishes as proposed by the Ministers in the re-zoning of the Greenfield sites.*"

A considerable number of respondents voiced the concern that increasing the population to prepare for 2035 might serve only to store up similar problems for the Island in the future. The following comments are representative of these views:

"In all but scenario one, we will deliberately grow the population with people who will in time retire in the Island and become part of the problem they came to solve."

"If dependency ratios were to be maintained at close to today's levels through inward migration, surely the immigrants themselves will also grow old and then need support in their old age themselves through still further inward migration? Could this self perpetuation situation ever be broken, once started?"

Several submissions highlighted the concern that an ambitious growth policy and increased inward migration could bring a number of negative consequences, especially in relation to traffic congestion; a representative selection of comments has been included:

"We need to know the impacts on traffic, road improvements and policing as these appear to be missed out under the phrase 'infrastructure and resources.' "

"Our roads are groaning and breaking under the strain of our already increasing vehicle quota. How will public services cope with more? Traffic at peak times is a nightmare already."

"Jersey's transport system is vastly inefficient, and an adequate public transport system would yield huge financial and other benefits."

One respondent argued that the focus of the Imagine Jersey 2035 public consultation should be shifted in favour of: *"...a new approach where we aim for quality of life instead of quantity...The words 'quality of life' (or its virtual synonyms in this context such as well-being or happiness) are mentioned just once in the consultation guide. The talk is all about prosperity, incomes, growth and tax. But these things do not themselves make us happy or fulfilled."*