

‘FUTURE JERSEY’ **2017-2037**



**Shaping a shared, long-term
community vision.**

July 2017

States of Jersey **SHAPING**
OUR **FUTURE**



Thinking about Jersey's future



Foreword by the Chief Minister

Jersey is on the cusp of creating its first shared, long-term vision. It will look ahead 20 years and describe our ambitions, as a community, for the future.

The Island has a rich history, and has demonstrated its ability to adapt and prosper in a changing world. Now, more than ever, we need to look to the future and deliver a Jersey that is a great place to live, for Islanders of all ages and circumstances.

'Future Jersey' takes us in this direction. It combines Islanders' ambitions with the facts and figures on how we are doing today, economically, environmentally, and as a community. It will provide the foundations for a vision that is achievable and not an unrealistic wish list.

I would like us to keep and improve what is special about Jersey, including our beautiful environment and our safe community. But we also need to change some areas, making Jersey more affordable, producing a fairer society, and finding ways to improve the productivity of our economy.

This will not be easy. Jersey is a small Island, subject to global forces. As we think constructively about Jersey's future, we should also consider the tensions, trade-offs, and challenges we face - meeting the cost of an ageing society; attracting and developing the skills our economy and society needs, while delivering enough homes and protecting our green spaces; and increasing wages while seeking to keep prices low.

We can do this by working together and being clear about what success looks like. To do this, we need to know what you think. This needs to be a genuine community vision for Jersey. After all, it is our home, our vision, our future.



I hope that 'Future Jersey' will generate debate and build consensus about what our long-term vision should look like, helping us all to set a clear direction for our future.

I look forward to hearing what you have to say.

Senator Ian Gorst
Chief Minister



We need a long-term vision to ensure our future is shaped by choice, not by chance.

Introduction

A future shaped by choice not chance

In a changing world, Jersey faces choices that will affect not only our lives, but also those of our children and future generations. We need a long-term vision to ensure our future is shaped by choice, not by chance.

The vision will set out our realistic ambitions, as a community, for Jersey's future over the next 20 years. This means that decisions and policies will be tested against the long-term social, environmental and economic outcomes we want for our Island.

For all who will live, work and grow up here, this vision should help to ensure we don't lose sight of the Jersey we want to see and experience by 2037.

We cannot take our future for granted

There is no better or more important time to think about Jersey's future than now.

There's much to love about our Island, from its natural beauty to the strong sense of community that comes with Island life and the prosperity built upon generations of work and enterprise. But we cannot afford to take this position for granted.

Like many places around the world, Jersey faces emerging challenges that call for new ways of thinking and decisive action. An ageing society, climate change and shifting global economics are just some of the issues that will change the Island we know today.

We are in a strong position to respond and adapt but standing still is not an option. Every resident and organisation, as well as government, needs to play their part.

The next step towards a vision

This discussion document is the latest part of a government-led, community consultation to engage Islanders in building Jersey's first long-term, shared vision.

'Future Jersey' takes an important step towards shaping this vision. It sets out statistical measures, which outline how Jersey is performing. It then proposes long-term ambitions for where Jersey should be heading, taking into account the results of the 'My Jersey' public consultation survey¹.

To continue the consultation, Islanders are being asked for their views:

- Do you agree with the long-term ambitions being proposed?
- Would you change anything and if so, why?

Comments on the 'Future Jersey' proposals can be submitted via the online forms at www.shapingourfuture.gov.je.

The closing date is Wednesday 4th October 2017.

Comments can also be sent to:
'Future Jersey'
Chief Minister's Office
Cyril Le Marquand House
PO Box 140, St Helier
Jersey JE4 8QT

¹See p58 for more information about the consultation.

As we plan for Jersey's future, there are emerging global trends that will change our Island as we know it today.

A rapidly ageing population

There will be about 11,000 more pensioners in Jersey by 2035. This will drive up the cost of health and social care. Over-65s typically require four times more health care than an average adult.

Without some migration, our home-grown workforce will shrink as more people retire than leave school.

An increase in preventable health conditions

Jersey is heading towards an unhealthy and costly future if more Islanders develop chronic but preventable diseases linked to unhealthy lifestyles. On current trends, for example, nearly one in eight Islanders could have diabetes by 2020. New medicines and technology improve treatment but increase costs. Economic participation, productivity and earnings are also impacted.

Climate change

Jersey is already seeing rising sea levels and more severe weather events.

Apart from an increased risk of flooding and storm damage, changing weather will pose risks to public health, water supplies, ecosystems, agriculture and biodiversity. New pests and diseases will emerge.

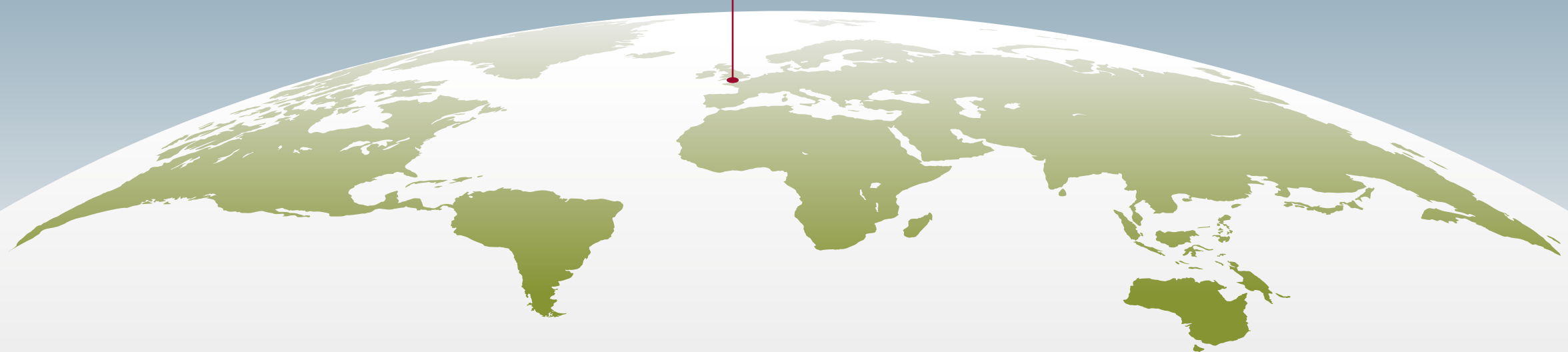
Changing technology

Technology will change the types of jobs we do in Jersey and the skills we need in areas such as finance, agriculture and tourism.

Without embracing digital opportunities, we may not be able to protect existing businesses and jobs or create new ones.

Growing competition for business, investment and talent

By 2030, 82% of people in the developed world are expected to live in urban areas. Cities offer the jobs and lifestyle many young, skilled workers want. Jersey will face increasing competition for the talent, business and investment it needs. Persuading young Islanders not to head to the big city lights - or attracting others to take their place - will get harder, but become more important.



The bottom line

These emerging challenges will make it harder to balance income and expenditure.

Today, health, social care and social security account for nearly 60% of spending on Jersey's public services. An increase in chronic health conditions and 70% more pensioners will significantly increase this expenditure over the next 20 years.

At the same time, a shrinking working age population would mean fewer workers to fund this spending.

There are no easy answers

Government cannot keep pace with increasing costs by simply making services more efficient. Re-thinking what government does and how it operates will be key if Jersey is to maintain the services that have the most impact on Islanders' quality of life.

Businesses and talent are highly mobile in today's world and will leave if their aspirations can be better met elsewhere. Tax policy must be fair and competitive, and not risk triggering a downward economic spiral that compromises Jersey's capacity to meet the costly challenges of the future.

Population policy is not a number

Many other governments see inward migration as a solution because it replenishes an ageing workforce, supports economic growth and sustains tax revenue. Many Islanders are concerned, however, that population growth will erode the social and environmental qualities that make Jersey special.

Jersey must find a way to overcome these challenges. Population policy should be the sum of many parts and should support the balance between community, environment and economy within the vision. For example:

- How can we improve the skills of Jersey's workforce and improve productivity to help address future demand for migrant labour?
- How can we preserve Jersey's green space and reduce traffic congestion, while increasing satisfaction with housing and accommodating any required population increase?

The outcomes are about big picture results - our safety, health, good jobs and clean air will be as important in 20 years' time as they are today.



The vision: how will it work?

Jersey's vision will be based around ten community, environmental and economic Island Outcomes which drive our quality of life.



Key facts about outcomes

- **Outcomes are long-term in nature**
They describe a clear image of the Jersey we want to create over the next 20 years. They are about sustained improvement, not instant results.
- **They are enduring**
The outcomes are about big picture results - our safety, health, good jobs and clean air will be as important in 20 years' time as they are today.
- **The outcomes are not unique to Jersey**
Communities around the world use similar outcomes - they are the essential conditions that matter to people everywhere. What will set Jersey apart will be our progress towards the outcomes and how we highlight our strengths to promote the Island.
- **They work together, not alone**
We cannot afford to put community, the economy or the environment in separate boxes. They all contribute to our quality of life and impact on each other.
- **Outcomes are about the 'what' not the 'how'**
They are the end results we want for Jersey, not how we are going to get there - this detail belongs in a range of social, economic and environmental delivery strategies.



- **They are a shared responsibility**
While government can lead efforts to deliver progress, no minister or States department can single-handedly deliver the outcomes; we, as a community, must work together.

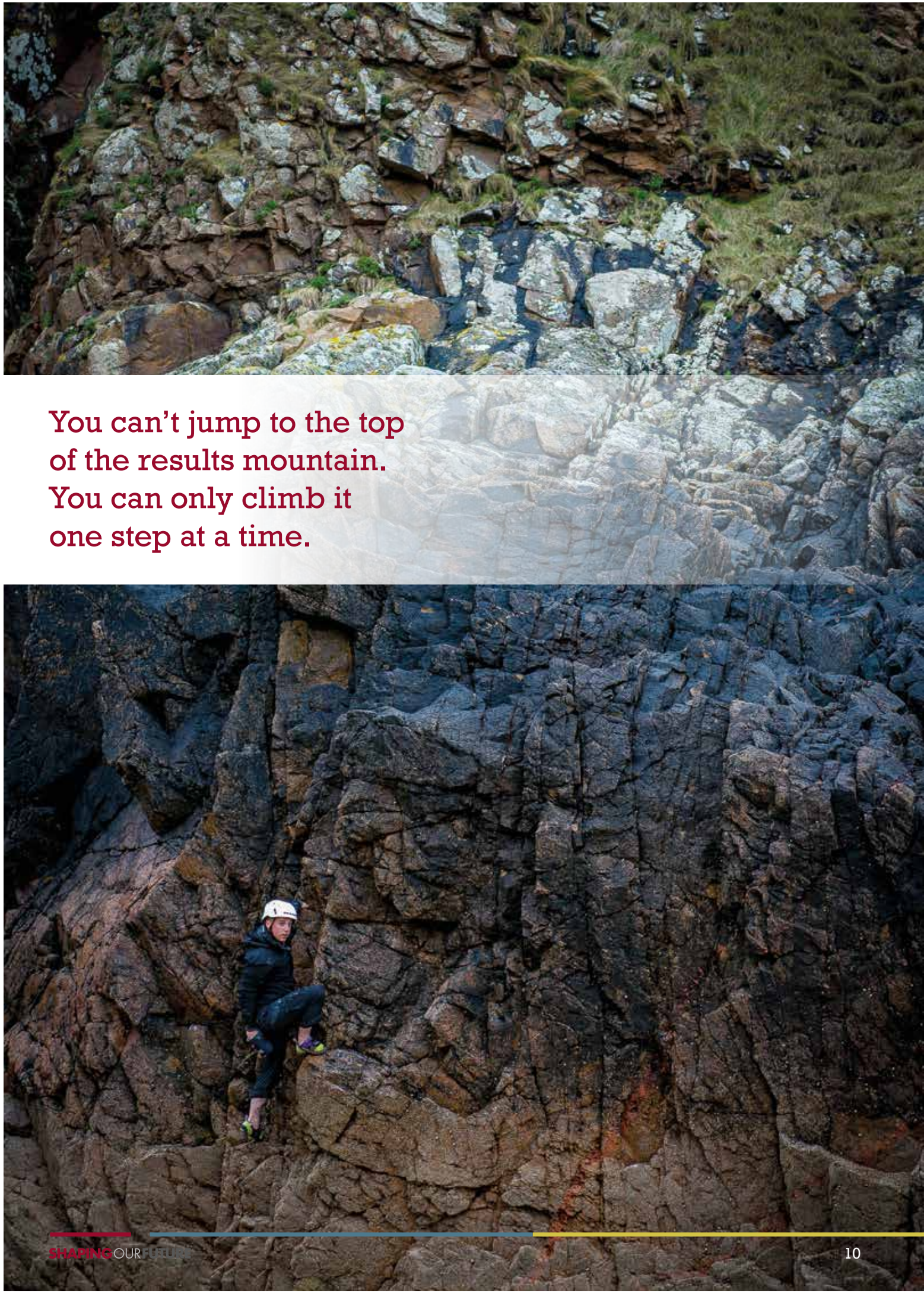
Island Indicators

A set of 58 'Island Indicators' sit below the ten Island Outcomes. They give us the vital information we need to assess whether Jersey is making progress towards the outcomes, and what needs attention.

The indicators measure the rate of progress for everything from the number of injuries on our roads, to how clean our air is and the productivity of our economy.

The current rate of progress for each indicator is shown in a series of graphs in this report, which demonstrate in facts and figures where Jersey stands today. These trends are then taken into account in setting a proposed long-term ambition.

However, these headline indicators are not the end of the measurement story; underpinning each of them will be raft of secondary indicators giving us more detail so we can fully understand what is happening and why.

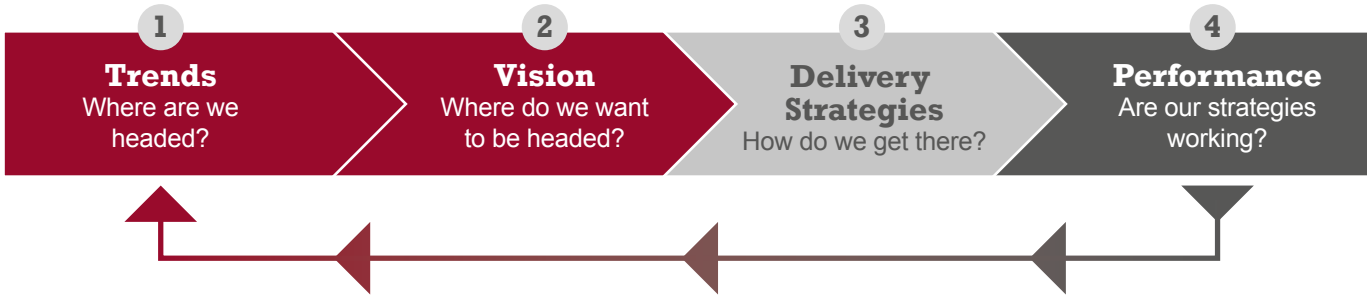


You can't jump to the top of the results mountain. You can only climb it one step at a time.

It's all about the trends

Future Jersey begins to shape Jersey's long-term vision by focusing on steps one and two in the diagram below and asking the question:

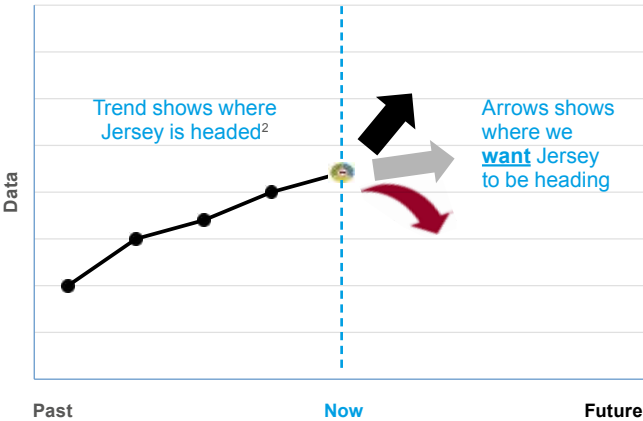
“Is Jersey heading in the right direction?”



Future ambition

To help us to answer this question and promote discussion about our shared ambitions for Jersey's future, the following pages take the 58 indicators, consider the feedback from 'My Jersey' and how progress might impact on other indicators. A long-term ambition is then proposed as either:

- ➡ **CONTINUE THE TREND**
Consolidate or build on a current trend
- ➡ **IMPROVE THE TREND**
Increase the current rate of progress
- ➡ **TRANSFORM THE TREND**
Set a new direction







Different challenges

- **None of these choices represent an easy option.**
In our changing world, 'continuing' progress against one indicator may prove just as challenging as 'transforming' another.
- **These choices do not imply prioritisation of resources.**
The challenges of improving each indicator are different, and so are the strategies and resources required. Priorities also change over time, depending on circumstances and progress. In terms of States spending, this responsibility will sit with each new States Assembly.
- **Long-term ambition is not about instant results.**
Most of the indicators will only move slowly; you can't jump to the top of the results mountain. You can only climb it one step at a time.

A summary of the proposed long-term ambition for each indicator is over the page. It is followed by more detailed sections on each outcome that explain why the ambitions have been chosen.

²Where possible, the data goes back to 2006. If the historic trend is measured over a shorter period, the indicator has either been used for a shorter period of time or earlier data was collected differently and isn't directly comparable. In some cases, the indicators are new so it will take longer to start gathering data and identify trends.

All the outcomes, indicators and ambitions at a glance

Proposed long-term ambitions for Island Indicators					
Island Outcomes		 CONTINUE THE TREND Consolidate and build	 IMPROVE THE TREND Increase the rate of progress	 TRANSFORM THE TREND Set a new direction	
Safety and Security We will feel safe and protected at home, work and in public p.14		Lower crime levels Safer neighbourhoods Fewer fires Fewer work-related injuries/ illnesses	-	Fewer injuries on our roads	 Work/life balance Ready to learn School leaver destinations Healthy life expectancy
Learn and Grow Our children will enjoy the best start in life p.18		Healthier birth weights	Higher breastfeeding rates More pupils progressing to A-Level or equivalent	Better results at A-Level or equivalent	
Vibrant and Inclusive We will enjoy living in a vibrant and inclusive community p.22		Greater life satisfaction among Islanders Greater social contact Greater satisfaction with sport	Greater satisfaction with culture	Increased volunteering Less discrimination Greater life satisfaction for the disabled	
Health and Wellbeing We will enjoy long, healthy, active lives p.26		Lower alcohol consumption	Fewer smokers	Less obesity Improved mental wellbeing	
Built and Historic Environment We will value and enjoy our built and historic environment p.30		Protection for heritage assets Greater neighbourhood satisfaction	Less traffic congestion More people actively travelling	Greater satisfaction with St Helier as a place to live More new homes Greater satisfaction with housing	Ramsar sites
Natural Environment We will protect our unique natural environment for future generations p.34		Protection for natural green spaces Protection for Sites of Special Interest (SSI) Cleaner sea water	-	More butterflies More birds	
Sustainable Resources We will use and manage our natural resources responsibly p.38		Cleaner air Reduced water consumption Less waste	Lower greenhouse gas levels Lower levels of energy use	Cleaner natural water	
Affordable Living We will be able to afford a decent standard of living p.42		-	Fewer low income households	More disposable income More people coping financially More Islanders able to buy a home Fewer households in rental stress Smaller gap between Jersey and UK consumer prices	Business start-ups
Attractive Business Environment Our Island will be an attractive place to do business p.46		Greater fibre optic coverage Higher economic participation	Better skilled workforce	Reduced migration	
Jobs and Growth We will benefit from a strong economy and rewarding job opportunities p.50		Lower unemployment	Higher average earnings	Increased economic output Increased productivity	



SAFETY AND SECURITY

We will be an Island where people feel safe and protected at home, work and in public

Why is this outcome important?

This outcome is about being and feeling safe, both of which are fundamental to our quality of life. Ensuring Islanders feel protected impacts on our overall wellbeing as a community, as well as affecting other areas, such as health care resources and economic productivity.

What Islanders said: highlights from the ‘My Jersey’ survey 2016

The levels of safety and security that we enjoy in Jersey are highly valued and seen by many Islanders as one of the defining characteristics of Jersey’s quality of life. ‘Safe’ was one of the most popular words used by Islanders to describe their vision for Jersey.

The feedback recognised that this was generally an area of strength for Jersey and the ambition was to build on what had already been achieved. Road safety was singled out as an area for improvement, with the added benefit that success would encourage more people to drive less and walk or cycle more.

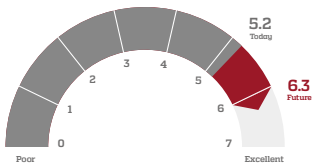
The topics covered in ‘My Jersey’

Closing the gap

The dial plots the average score people gave Jersey today against the average score they’d be happy with in the future

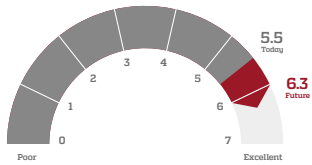
Protect people and property against crime and disorder

Crime, and fear of crime, can have a damaging effect on people’s lifestyles and community wellbeing.



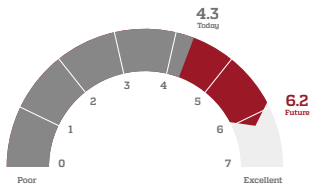
Protect people, property and the environment against fire

Fires can have a devastating effect on lives, livelihoods, our environment and property.



Ensure Jersey’s road users are safe

Road safety matters to everyone who uses Jersey’s roads. Serious crashes cause suffering to individuals and communities, and are demanding on health and emergency services.

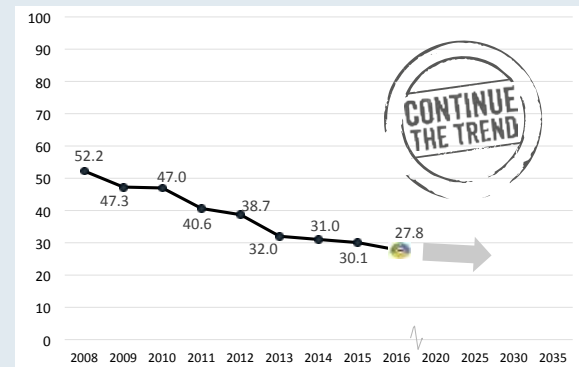


Protect people’s health and safety at work

Work-related illness and injury result in costs to individuals, employers and government - including lost income, insurance, production and legal costs, and demands on health care resources.

No gap analysis available

Recorded crime



Data source: States of Jersey Police

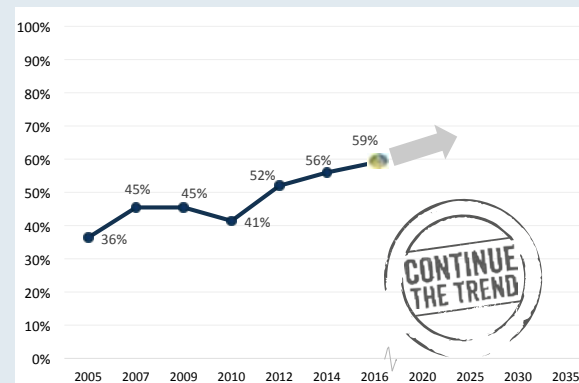
Measures: the number of crimes recorded by the Police per 1,000 people in Jersey.

The facts: in 2016, 2898 crimes were recorded, representing about 28 crimes per 1,000 people. Jersey has had one of the lowest crime rates in the British Isles for many years.

Long-term ambition: CONTINUE

This reflects Islanders' strongly held view that Jersey should build on what has already been achieved. Sustaining a downward trend will further enhance Jersey's attraction as a place to live and do business. It will help reduce costs for government, businesses and households and improve social and individual wellbeing.

Neighbourhood safety



Data source: States Statistics Unit

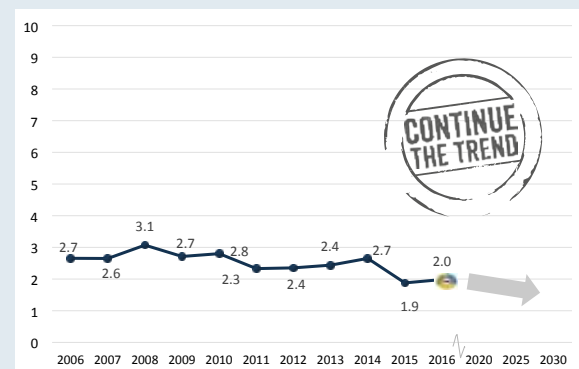
Measures: % of Islanders who say their neighbourhood is 'very safe'.

The facts: community safety is not just about trends in recorded crime but also whether people feel safe. About 90% of Islanders describe their neighbourhood as either 'fairly' or 'very safe'. Since 2005, more and more have been increasing their rating from 'fairly' to 'very' safe. In 2016, a record 59% of Islanders rated their neighbourhood as 'very safe'.

Long-term ambition: CONTINUE

Feeling safe is a key to our quality of life and helps promote personal wellbeing, social cohesion and a vibrant culture.

Number of fires



Data source: Jersey Fire and Rescue Service

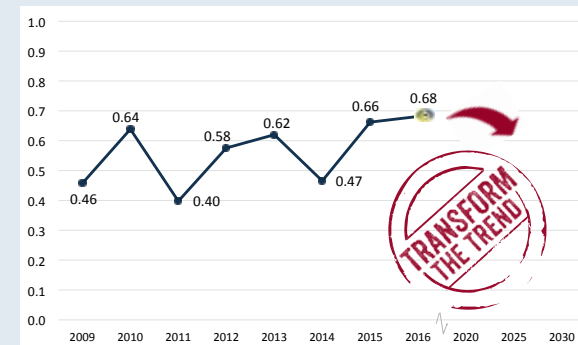
Measures: the number of fires per 1,000 people in Jersey.

The facts: in 2015, the Fire Service recorded 193 fires in Jersey, the lowest for 50 years. While the overall downward trend is positive, there is concern that the number of fires in homes and commercial buildings has started to increase in recent years.

Long-term ambition: CONTINUE

This reflects the value Islanders place on current levels of fire safety. Continued progress will enhance Jersey's reputation as a safe Island, further reduce the risk of death or injury, contribute to community wellbeing and help reduce future costs for government, businesses and households.

Injuries on our roads



Data source: States of Jersey Police

Measures: the number of road traffic collisions that resulted in deaths or serious injury per 1,000 people in Jersey.

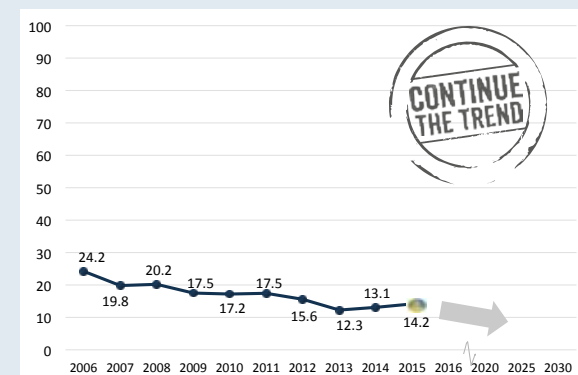
The facts: in 2016, 71 road traffic collisions resulted in fatal or serious injuries.

The trend is gradually worsening although the number of crashes can vary by up to 45% between years. On average, two people have been killed on Jersey's roads annually since 2008 and another 57 seriously injured, of whom about ten suffer life-threatening / changing injuries.

Long-term ambition: TRANSFORM

This reflects the public's ambition to see road safety improve. In addition to reducing the risk of death or injury, progress could encourage more active, healthier forms of travel. This, in turn, will help reduce traffic congestion, improve air quality and reduce demand on health services.

Work-related injuries and ill-health



Data source: Social Security Department

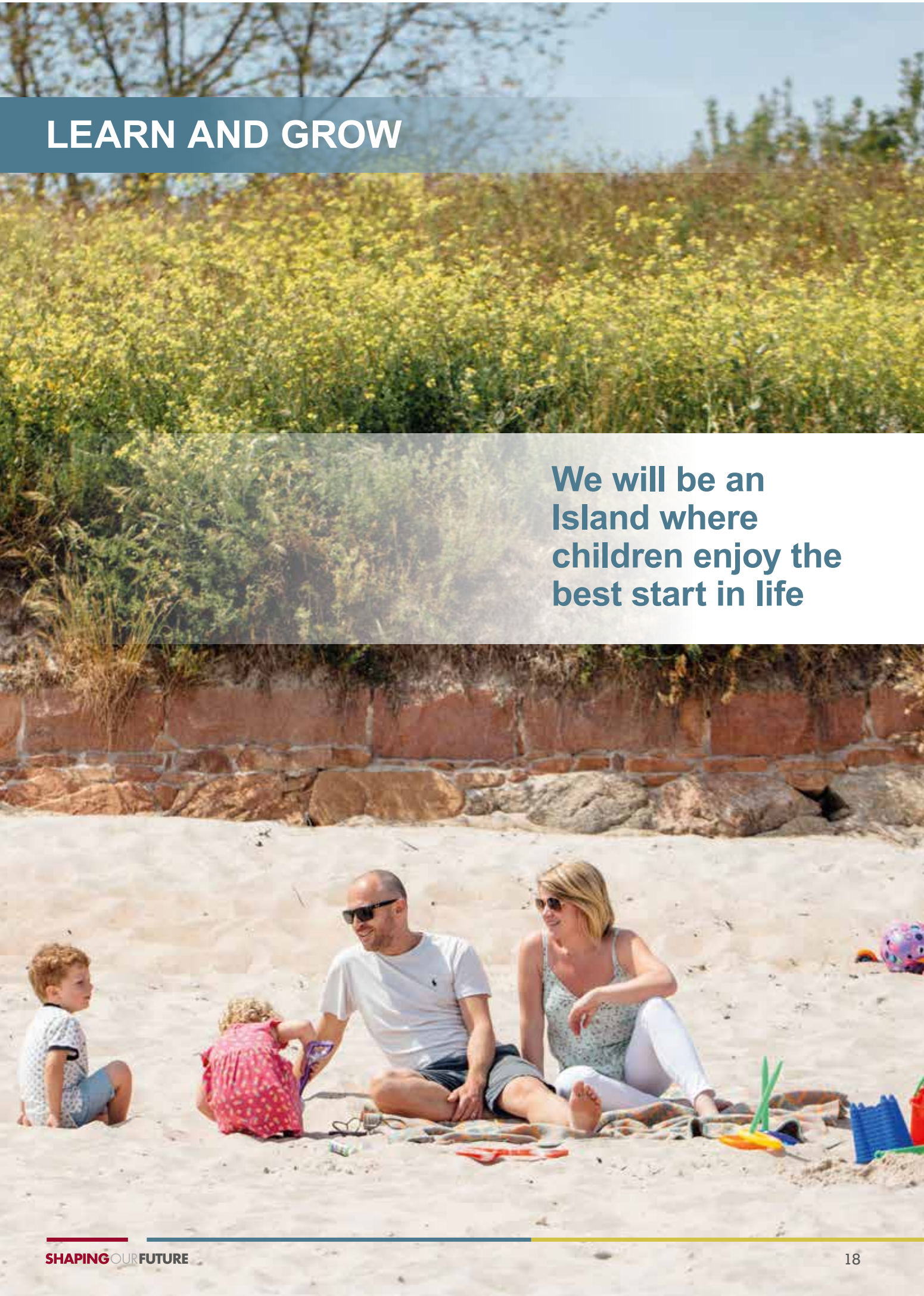
Measures: the number of claims for Short Term Incapacity Allowance (STIA) due to work-related incidents per 1,000 full-time equivalent (FTE) employees.³

The facts: in 2015, there were 748 claims for STIA due to work-related injuries or illness. This equates to 14.2 for every 1,000 FTE workers. Of these, 61% resulted from accidents. In 2015, over 26,000 working days were lost and £736,257 was paid out in STIA. Despite a downward trend since 2006, recent increases have been driven by work-related stress. Growth in the construction sector will also have an influence.

Long-term ambition: CONTINUE

Building on the overall downward trend will further improve personal safety, reduce economic losses and avoidable costs to the health and social security systems.

³Indicators are based on the most up-to-date data available at the time of publication.



LEARN AND GROW

We will be an Island where children enjoy the best start in life

Why is this outcome important?

This outcome is about ensuring that children and young people grow up in an Island that provides the opportunities they need to achieve their potential by being ready for, and succeeding in, school.⁴

What Islanders said: highlights from the ‘My Jersey’ survey 2016

People acknowledged that Jersey enjoys significant advantages as a place to grow up but also set their future expectations very high. Islanders want Jersey’s children to have the best possible start in life.

Respondents felt there were opportunities to improve the way Jersey’s education system is structured, as well as current policies regarding maternity provision and the funding of nursery care and university education.

There were also concerns over the range and cost of activities for children and the amount of time that many parents are able to properly invest in family life. In particular, many people highlighted the long hours they worked in order to meet the cost of decent rental accommodation or a mortgage.

The topics covered in ‘My Jersey’

Create the best possible start for every child in Jersey

The early years of babies’ lives shape their brain development and have a life-long impact on their mental and emotional health. Getting these early years right can make a huge difference to their life chances.

Provide every child with educational opportunities to help realise their potential

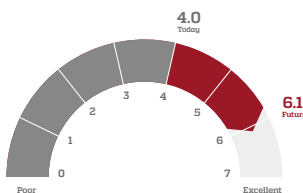
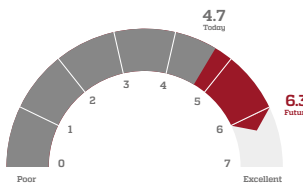
The skills that young people have when they leave formal education are a strong predictor of their future. Quality education can give children and young people the skills and knowledge they need to be successful.

Promote a healthy work/life balance

Finding a balance between time spent at work and time spent on family commitments and personal lives is important for the wellbeing of all members in a household.

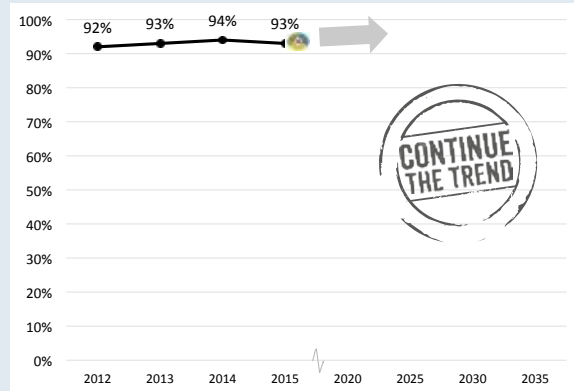
Closing the gap

The dial plots the average score people gave Jersey today against the average score they’d be happy with in the future



⁴While this outcome is about children achieving their potential, other outcomes, such as safety, health and affordable living, will also be viewed with children in mind.

Healthy birth weight



Data source: Health and Social Services Department

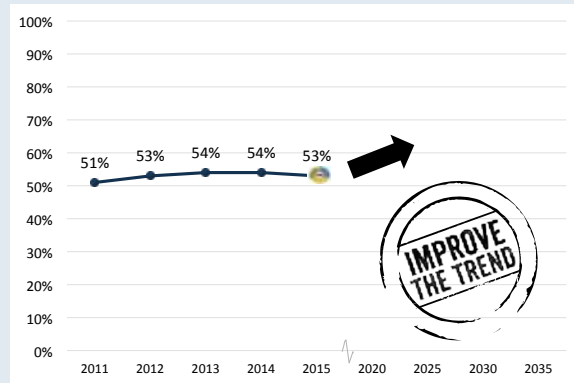
Measures: % of new born babies with a weight appropriate for their gestational age (usually based on an ultrasound scan).

The facts: in 2015, 93% of Jersey babies were a healthy birth weight, 2% were low and 5% were high birth weight.

Long-term ambition: CONTINUE

This is proposed because birth weight that is not within normal ranges has a strong association with poor health outcomes in infancy, childhood and across the whole life course. It also provides a robust proxy measure for maternal health behaviours and progress in reducing the health impact of socio-economic inequalities.

Breastfeeding



Data source: Health and Social Services Department

Measures: % of mothers who are breastfeeding (either fully or partially) at 6-8 weeks.

The facts: overall, 54% of infants born in Jersey between 2013 and 2015 were breastfed at 6-8 weeks; 16% partially and 38% totally. Jersey has seen a marginal improvement over the last five years. In England, breastfeeding prevalence ranged from 19% to 81.5% in 2014-15, with a national average of 44%.

Long-term ambition: IMPROVE

This recognises international research that breastfeeding is linked to better short and long-term health for the mother and child, improved brain development, educational outcomes and better income in adulthood.

Work/life balance



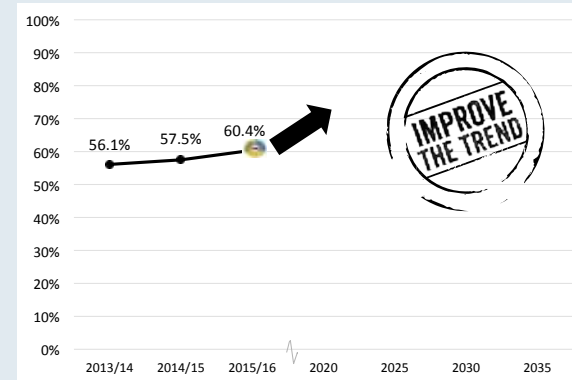
Under development: will monitor work/ life balance, which is seen as one of Jersey's key attributes and impacts on economic productivity and Islanders' health.

Ready to learn



Under development: will measure children's progress in their early years. Positive results would ultimately benefit educational achievement and, in turn, skills, earnings and personal wellbeing.

Progress to A-Level or equivalent



Data source: Education Department

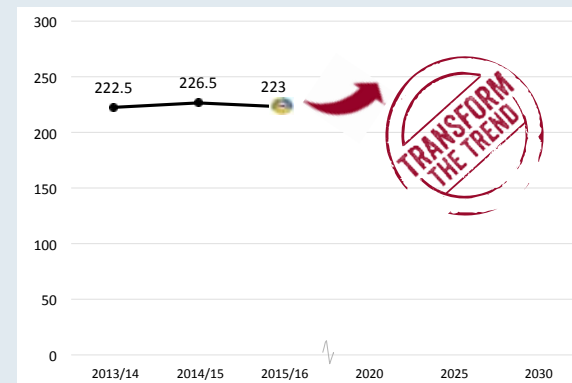
Measures: % of pupils who left Key Stage 4 and went on to take a Level 3 qualification (A-Level or equivalent).

The facts: in 2016, 60.4% of Key Stage 4 leavers in Jersey went on to study at least one substantial Level 3 qualification. Participation was higher for girls (68%) than for boys (53%). In 2016, the UK published a Level 3 participation rate of 71.2%, including pupils who entered an AS level. Including the latter would increase Jersey's 2016 participation rate to 61.4%.

Long-term ambition: IMPROVE

Gaining an upper secondary qualification is increasingly important. For individuals, it improves the prospect of more rewarding employment and it helps improve the skills base of Jersey's home-grown workforce.

Attainment at A-Level or equivalent



Data source: Education Department

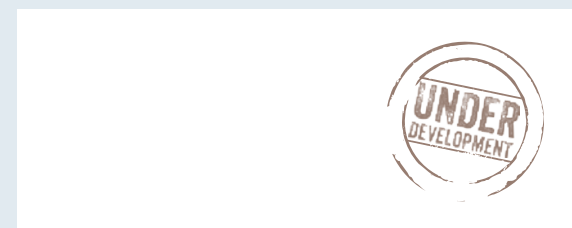
Measures: the average points score of Jersey pupils in Level 3 (A-Level or equivalent standard) examinations.

The facts: in 2015/2016, Jersey pupils' average point score per entry into Level 3 examinations was 223 (equivalent to a C+). Overall performance over the last three years has not changed significantly. The average score in England in 2015/16 was also equivalent to a C+.

Long-term ambition: TRANSFORM

Enabling Jersey's children to achieve their potential is key to Jersey's future. Better qualifications can lead to more satisfying and rewarding work and drive social mobility. Higher skilled workers positively influence productivity, earn higher wages, pay more taxes and need less support.

School leaver destinations



Under development: will look at the % of school leavers in sustained positive destinations - higher education, further education, employment or training. This will provide key insight into the profile of Jersey's workforce.



VIBRANT AND INCLUSIVE

We will be an Island where people enjoy living in a vibrant and inclusive community

Picture Courtesy of the Jersey Evening Post

Why is this outcome important?

Our future relies on people wanting to live in, or return to, Jersey. An important factor influencing that choice is Jersey's attraction as an Island where people and community matter – a great place to live, socialise, grow up and belong. Being a small Island means we have the opportunity to remain a place where community really means something.

What Islanders said: highlights from the 'My Jersey' survey 2016

It was recognised that it can be difficult for newcomers to make friends and create support networks. Some would like to see more cultural integration between different resident nationalities. Comments also highlighted particular problems relating to transport for disabled people, resulting in isolation, inability to access services or high costs. The role played by charities was highly valued, but inconsistencies in service provision and discrimination were highlighted as concerns.

Islanders felt investment in arts, heritage and culture should be seen as an essential part of individual and community wellbeing not a bonus. They recognised the standard of sporting facilities and achievement for such a small Island but did highlight the importance of maintaining broader community participation in a range of sports.

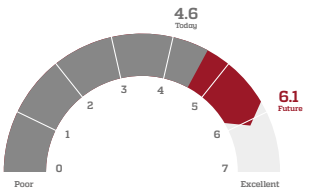
The topics covered in 'My Jersey'

Jersey is a welcoming and caring community

A sense of community promotes a feeling of belonging and the value of diversity, enabling people to work together to tackle exclusion and marginalisation.

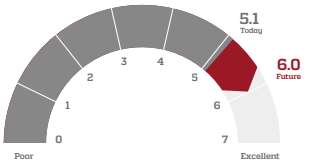
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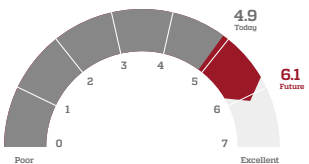
Sport is important and valued in Jersey

Sport is a powerful tool to strengthen social ties and networks, and has a positive impact on the health of our community, economic activity and the cost of medical care.



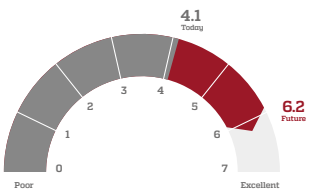
Arts, heritage and culture are important and valued in Jersey

Our arts, heritage and culture are key to our sense of identity as an Island. Cultural participation is known to bring benefits in learning and education, good health, social inclusion and satisfaction with life.

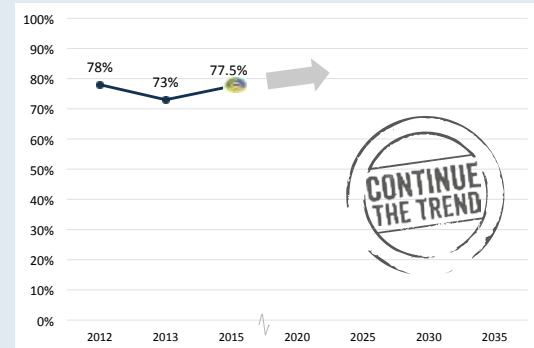


People living with long-term health conditions or disability enjoy a good quality of life

Like everyone, disabled people aspire to a good life. However, they can face significant barriers to achieving the life that so many take for granted.



Life satisfaction



Data source: States Statistics Unit

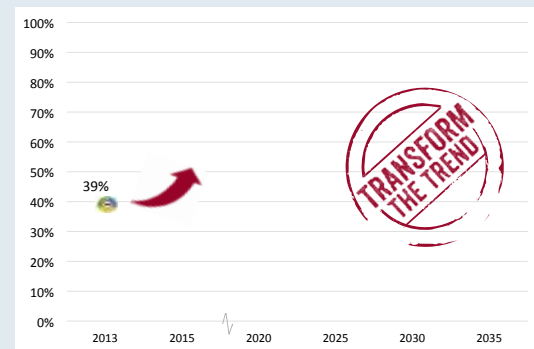
Measures: % of Islanders scoring their life satisfaction from seven to ten on a scale of zero (worst) to ten (best).

The facts: in 2015, 77.5% of Islanders scored their life satisfaction at seven or more. Just 5% scored four or less. Since 2012, Jersey's average score of 7.5 has compared favourably with the highest among OECD countries.⁵

Long-term ambition: CONTINUE

The vision is about our quality of life in Jersey. The ambition should be for Islanders' life satisfaction to continue to rank among the best, nationally and internationally.

Volunteering



Data source: States Statistics Unit

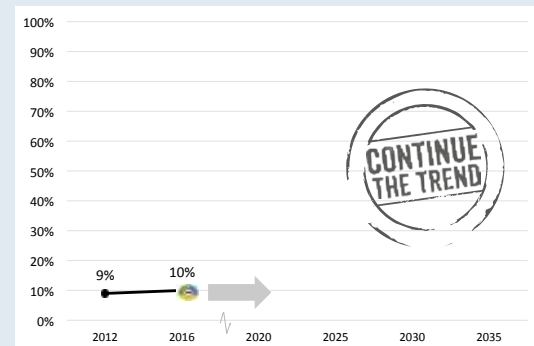
Measures: % of adults who have volunteered in the previous 12 months.

The facts: in 2013, it stood at 39%, with 23% doing some volunteering at least monthly. The equivalent figures in the UK in 2014/15 were 42% and 27%. No trend is currently available but other data suggests fewer people may be volunteering these days. In 2006, 53% said they never volunteered compared with 61% in 2013.

Long-term ambition: TRANSFORM

An increase in volunteering could support a range of community and environmental outcomes, and an ageing population offers an expanding pool of potential volunteers.

Social contact



Data source: States Statistics Unit

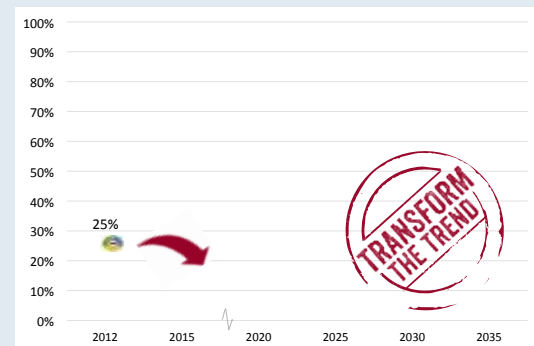
Measures: % of adults who rarely or never socialise with people outside their household.

The facts: of the 10% of Islanders who reported 'rarely' or 'never' socialising outside their household in 2016, a third of these people were also 'not very' or 'not at all' satisfied with their lives.

Long-term ambition: CONTINUE

As our society ages, it is important to guard against increasing loneliness. Finding opportunities to improve (eg 32% of those who are unable to work due to sickness or disability 'rarely' or 'never' socialise outside their household) will also benefit health and life satisfaction indicators.

Discrimination



Data source: States Statistics Unit

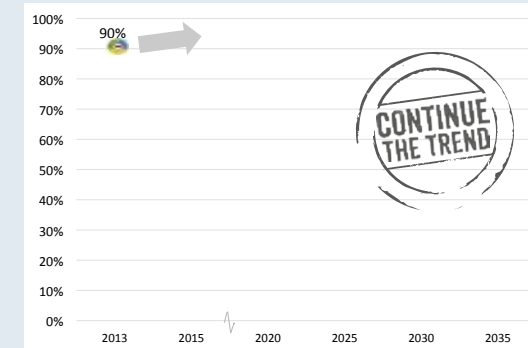
Measures: % of adults who report having been discriminated against in the previous 12 months.

The facts: in 2012, 25% reported such discrimination, with age and nationality featuring in particular.

Long-term ambition: TRANSFORM

Trend data is unavailable so the proposed ambition reflects the purpose of the current programme of legislation being rolled out to protect people against discrimination. Progress will benefit personal and community wellbeing, and support increased economic participation.

Sport



Data source: States Statistics Unit

Measures: % of adults who rate the range of sporting activities and events in Jersey as 'good' or 'very good'.⁶

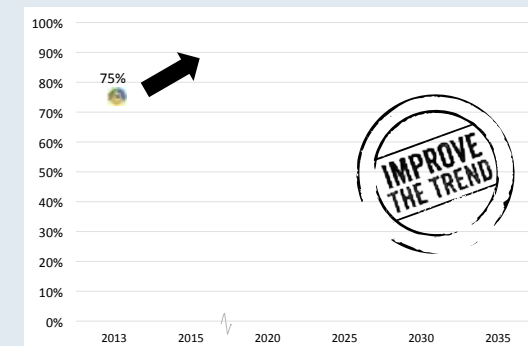
The facts: in 2013, the overall total of 90% was divided between 63% who rated the range of sporting activities and events as 'good' and 27% who said 'very good'.

Long-term ambition: CONTINUE

While trend data is not available, the ambition is proposed because the high rating from 2013 was reinforced by the positive findings from 'My Jersey'. The challenge will be to shift perceptions of sporting activities and events in Jersey from 'good' to 'very good'.

Progress will benefit health and life satisfaction indicators and support Jersey's attraction as a place to live.

Culture



Data source: States Statistics Unit

Measures: % of adults who rate the range of cultural activities and events in Jersey as 'good' or 'very good'.

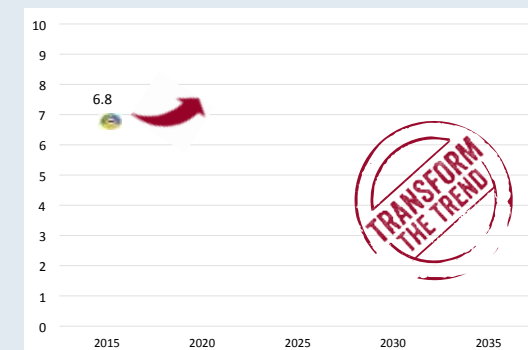
The facts: in 2013, the overall total of 75% was divided between 58% who rated the range of cultural activities and events as 'good' and 17% who said 'very good'.

Long-term ambition: IMPROVE

Although the high rating from 2013 was reinforced by the positive findings from 'My Jersey', the results also showed culture lagged behind sport.

A quarter of people also gave cultural activities and events poor ratings in JASS⁷ 2013. Improvement will benefit health and life satisfaction indicators and support Jersey's attraction as a place to live.

Living with disability



Data source: States Statistics Unit

Measures: the average life satisfaction score of Islanders living with a disability or long-term condition.

The facts: about one in seven Islanders living in private households are disabled. Of these, just 31% reported high life satisfaction in 2015 compared to 51% of other Islanders. Removing barriers to disabled people achieving the life that many take for granted is key for improvement – in 2015, 60% found it difficult to take part in community activities, 41% experienced difficulty travelling around Jersey and 28% found it difficult to get the work they wanted.

Long-term ambition: TRANSFORM

This reflects the strong feeling in 'My Jersey' that more should be done. Progress will benefit health and life satisfaction indicators as well as economic participation and productivity.

⁵ From 2017, a revised question will be adopted to allow comparison with UK regions. It was used in the 2015 Health and Life Opportunities Survey and Jersey's results were among the best nationally.

⁶ Both the sport and culture indicators focus on survey respondents who expressed an opinion and exclude 'don't know' responses.

⁷ JASS stands for Jersey Annual Social Survey, which is now the Jersey Opinions and Lifestyle Survey (JOLS).

HEALTH AND WELLBEING

We will be an Island where people enjoy long, healthy, active lives

Why is this outcome important?

This outcome is about Islanders being healthy and, as a result, having the opportunity to live longer and active lives. This helps prevent the need for health interventions and ensures that healthcare and support can be targeted to those who need it most. It is also about ensuring that people can access the right treatment when they need it.

What Islanders said: highlights from the 'My Jersey' survey 2016

There was particular concern over the growing impact of obesity, high alcohol consumption, drugs, smoking and stress on the cost of healthcare. While some felt people should have complete freedom over their lifestyle choices, others challenged whether healthcare for people who fail to take adequate care of their own health should be funded by the community. Many also commented on the perceived costs of making healthier choices.

At the same time, people were worried about the capacity of the General Hospital in the face of increasing demand and the need for improved mental health services. Some concerns were raised regarding patients bearing the cost of travelling to receive treatment that isn't available in Jersey⁸ and also issues around funding for long-term care.

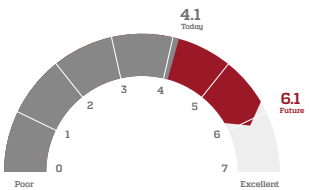
The topics covered in 'My Jersey'

Closing the gap

The dial plots the average score people gave Jersey today against the average score they'd be happy with in the future

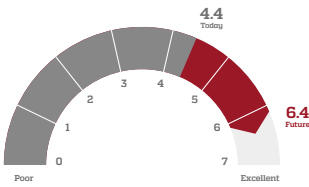
Islanders live healthy lives and risks to health are reduced

Good health is an indispensable aspect of our wellbeing and quality of life.



Islanders have access to good quality health care

People need to be able to get the right care, of excellent quality, at the time of need.



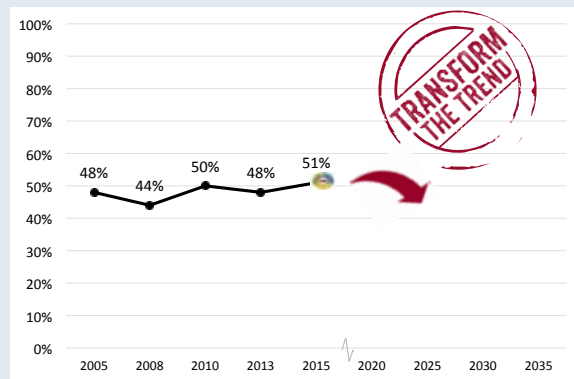
⁸ At the start of 2017, the Health Minister agreed a new policy which stopped the previous system of means-testing. All travel booked through the Health and Social Services Department Travel Office is now free.

Healthy life expectancy



Under development: will measure the average number of years a person can expect to live in good health. Ensuring longer life expectancy is accompanied by good health is essential if we are to contain rising health and social care costs. Progress will benefit personal and community wellbeing, economic participation and productivity, and more households would be able to sustain financial independence.

Obesity



Data source: States Statistics Unit

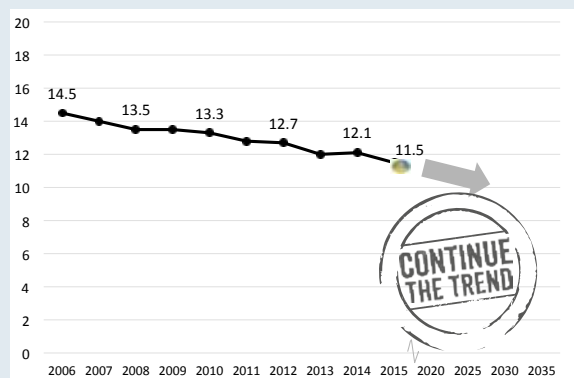
Measures: % of adults in Jersey who are overweight or obese.

The facts: overall, over half of Jersey's adults are overweight (37%) or obese (14%). The obesity rate hasn't changed significantly since 2008 but the proportion of overweight Islanders has grown from 32% to 37%. Worryingly, 20% of 4-5-year-olds are obese, increasing to a third of 10-11-year-olds.

Long-term ambition: TRANSFORM

This is proposed because obesity is a known risk factor for numerous chronic illnesses and a worsening trend will drive increasing health care costs. It will negatively impact on healthy life expectancy, financial independence, economic participation and productivity, and increase the risk of social exclusion.

Alcohol consumption



Data source: States Statistics Unit

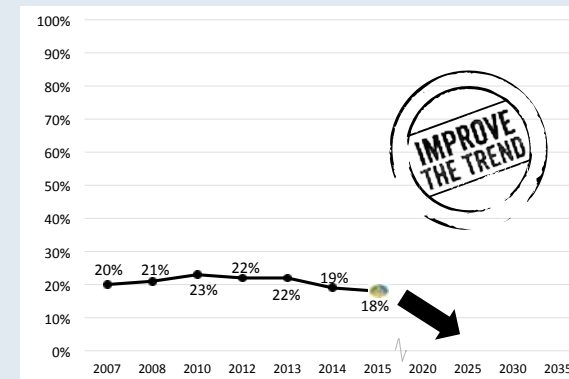
Measures: the consumption in litres of pure alcohol per adult in Jersey.

The facts: at 11.5 litres per adult, Jersey's consumption is about 15% above the European average, with 27% of drinkers doing so at potentially harmful levels. This manifests itself in higher hospital admission and death rates attributable to alcohol than in England. It also causes social harm - about 75% of people arrested for street violence and disorder have been drinking.

Long-term ambition: CONTINUE

Alcohol consumption in Jersey is down 21% since 2006. Continuing this trend could bring Jersey's consumption in line with the European average within five years. This could benefit several economic, health and community wellbeing indicators and reduce avoidable government spending.

Smoking



Data source: States Statistics Unit

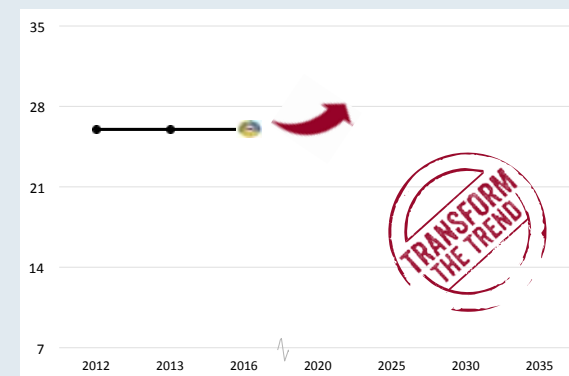
Measures: % of adults who smoke daily or occasionally in Jersey.

The facts: in 2015, nearly one in five Islanders aged 16+ were smokers. 12% smoked daily. About a quarter of 16-34-year-olds smoke and they remain the heaviest smoking age group. About 20% of deaths locally are from smoking-related conditions. In 2014, over 2,500 adults aged 35+ were admitted to hospital with a primary diagnosis of a disease potentially caused by smoking. Twice as many smokers aged 35-64 have longstanding health conditions compared to non-smokers. On average, households that bought tobacco spent £25 a week in 2014/15.

Long-term ambition: IMPROVE

Improving the current rate of progress would benefit numerous social, economic and environmental indicators, and reduce avoidable health spending.

Mental wellbeing



Data source: States Statistics Unit

Measures: mental wellbeing using a scale of scores from a questionnaire that range from a highest possible of 35 to a lowest of seven. The indicator is based on the 'short Warwick-Edinburgh', a validated tool used nationally to measure mental wellbeing over time.

The facts: Jersey's average score of 26 has remained unchanged since 2012 when 21% of Islanders displayed low wellbeing, 71% moderate wellbeing and 8% high wellbeing. By comparison, Guernsey found 16% low wellbeing and 17% high wellbeing in 2008.

Long-term ambition: TRANSFORM

Improving mental wellbeing is central to life satisfaction, educational attainment, economic productivity and participation, community wellbeing, crime and safety.

BUILT AND HISTORIC ENVIRONMENT

We will live in an attractive Island where people value and enjoy their built and historic environment



Why is this outcome important?

There is a close relationship between our built environment and our health and social wellbeing. The way we develop St Helier and the rest of our parishes not only affects the character of our Island but how we interact with each other. It has important implications for transport, crime and recreation and will help address future climate change, energy and water use challenges.

What Islanders said: highlights from the ‘My Jersey’ survey 2016

The gap between Islanders’ perceptions of St Helier today and their future aspirations was one of the biggest in the survey. Quality urban design, improved public spaces and better traffic management were seen as opportunities to improve Town whilst there was concern about the future of retail, drunkenness at the weekends and a desire for improved cultural offerings.

The cost of home ownership was highlighted. This, in turn, means more people are reliant on a private rental market, where costs and standards were challenged. By comparison, the improving quality of social housing was appreciated.

There was concern that investment in historic buildings was suffering as financial pressures increased and that much new development is doing little to add to our architectural heritage. The merits of preserving certain buildings and allowing environmental improvements to listed properties featured frequently.

Although the overall view on transport was positive, the issue generated considerable comment. Despite recognition that public transport has improved, it was perceived by some as expensive and limited in terms of connectivity, accessibility and frequency of service. There were also concerns that provision for cyclists and pedestrians needs to improve.

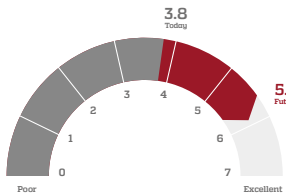
The topics covered in ‘My Jersey’

Closing the gap

The dial plots the average score people gave Jersey today against the average score they’d be happy with in the future

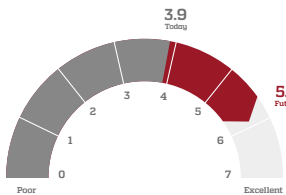
St Helier is a vibrant capital where people want to live, spend time and invest

St Helier is the engine of Jersey’s economy and, for most of us, the place where we work, live or socialise.



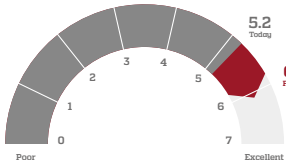
Jersey’s built environment provides quality homes and neighbourhoods

Having a decent home matters for all sorts of reasons - our comfort, security, health and belonging. An adequate supply of quality, affordable housing is essential for our society and economy to function and has an impact on the communities and environment we live in.



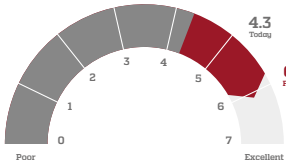
Jersey’s historic buildings and heritage sites are valued and protected

Our historic environment helps define our Island. Its conservation and development play an important role in economic growth, tourism, sustainable development and regeneration.

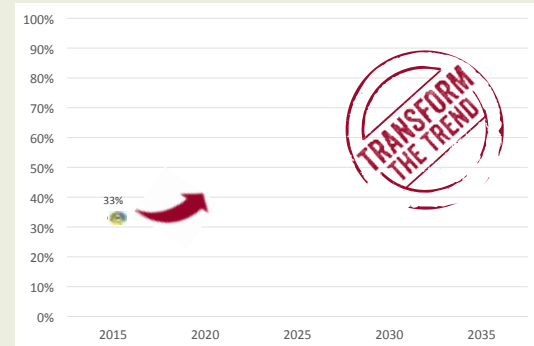


Islanders can travel around Jersey easily

Maintaining and improving our transport system affects our quality of life through reductions in congestion, pollution, road injuries and health problems caused by low levels of physical activity.



St Helier as a place to live



Data source: States Statistics Unit

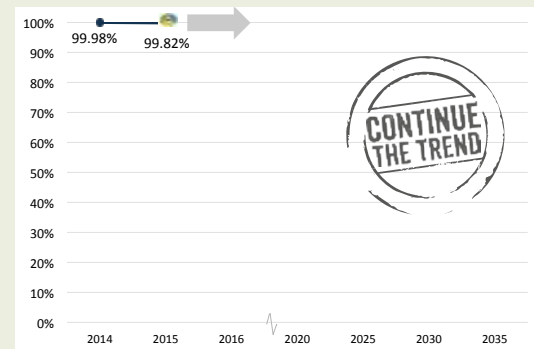
Measures: % of St Helier residents who are 'very satisfied' with Town as a place to live.

The facts: in 2015, 33% were 'very satisfied', with another 58% 'fairly satisfied'.

Long-term ambition: TRANSFORM

The 'My Jersey' results identified how Islanders would like to see significant improvement to St Helier. It is home to over a third of Islanders and our ambition must be for more than just 33% to be 'very satisfied' with urban living. This becomes even more important if we are to improve the supply of quality housing, reduce traffic congestion, protect our countryside and improve a range of other social and environmental indicators.

Heritage assets



Data source: Department of the Environment

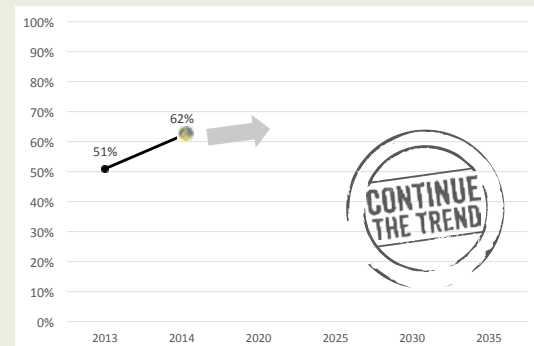
Measures: % of listed buildings and places protected for the benefit of future generations.

The facts: a review of over 4,300 known and potential heritage assets will be completed in 2017. Seven were lost in 2015, with pre-existing planning permission, and one in 2014. In 2013, 96% of Islanders said it was important to conserve Jersey's historic buildings for future generations.

Long-term ambition: CONTINUE

Once Jersey's heritage assets are lost, they are gone forever. Continuing long-term protection of these assets reflects public opinion and their social, economic and environmental importance.

Neighbourhood satisfaction



Data source: States Statistics Unit

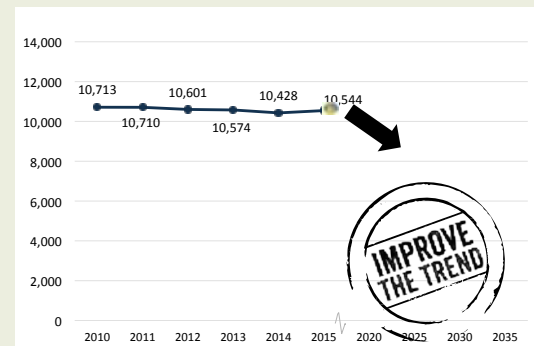
Measures: % of Islanders who are 'very satisfied' with their neighbourhood as a place to live.

The facts: in 2014, 62% were 'very satisfied', with another 33% 'fairly satisfied'. Only 45% of St Helier residents were 'very satisfied' compared to 72% in other parishes.

Long-term ambition: CONTINUE

Jersey is a small Island and most of its built environment is well-established. Any new development or renewal will be with us for generations so our ambition must be to seek continuous improvement, particularly in existing urban areas. Doing so will contribute to life satisfaction, community safety and Jersey's attraction as a place to live and work.

Traffic congestion



Data source: Department for Infrastructure

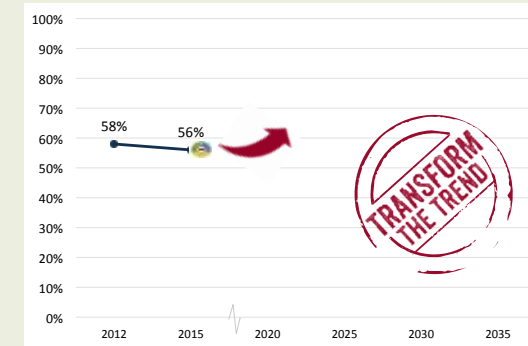
Measures: the traffic flow towards St Helier recorded during the morning peak period on nine main routes.

The facts: peak hour traffic has only decreased by 1.6% against a 15% reduction target since 2010. Population growth means that car use per head of population has decreased more than the data suggests. Future progress will require a cultural change away from private car use.

Long-term ambition: IMPROVE

This will help improve Jersey's performance on air quality, energy use and greenhouse gas emissions. It would also help mitigate the effects of any future population growth.

Satisfaction with housing



Data source: States Statistics Unit

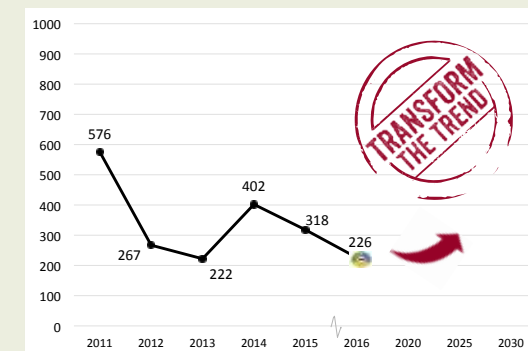
Measures: % of Islanders who are 'very satisfied' with their housing.

The facts: in 2015, 56% were 'very satisfied', with another 33% 'satisfied'. This is comparable with the UK and hasn't changed significantly since 2012. The proportion of people living in private rental accommodation who were 'very satisfied' was half that of owner-occupiers. More than one in ten Town residents were 'dissatisfied'.

Long-term ambition: TRANSFORM

The homes we live in today will provide most of Jersey's housing stock for the next 20 years. Improving the quality of this stock through new development and refurbishment will benefit health, energy use, household costs and life satisfaction.

Housing supply



Data source: Department of the Environment

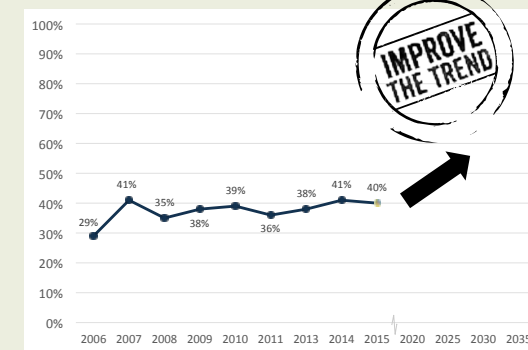
Measures: total additions to the supply of housing, from public and private new house building; conversions of existing buildings to housing use; or refurbishment of dwellings.

The facts: the revised Island Plan made provision for 3,630 new homes between 2013 and 2020. By the end of 2016, 1,168 of these homes had been completed.

Long-term ambition: TRANSFORM

Increasing the supply of new homes, and making better use of vacant and under-occupied units, is necessary to ensure Jersey meets current and future housing requirements, whilst increasing the quality and affordability of our housing stock. This will help support economic growth, healthier lives and improved life satisfaction.

Active travel



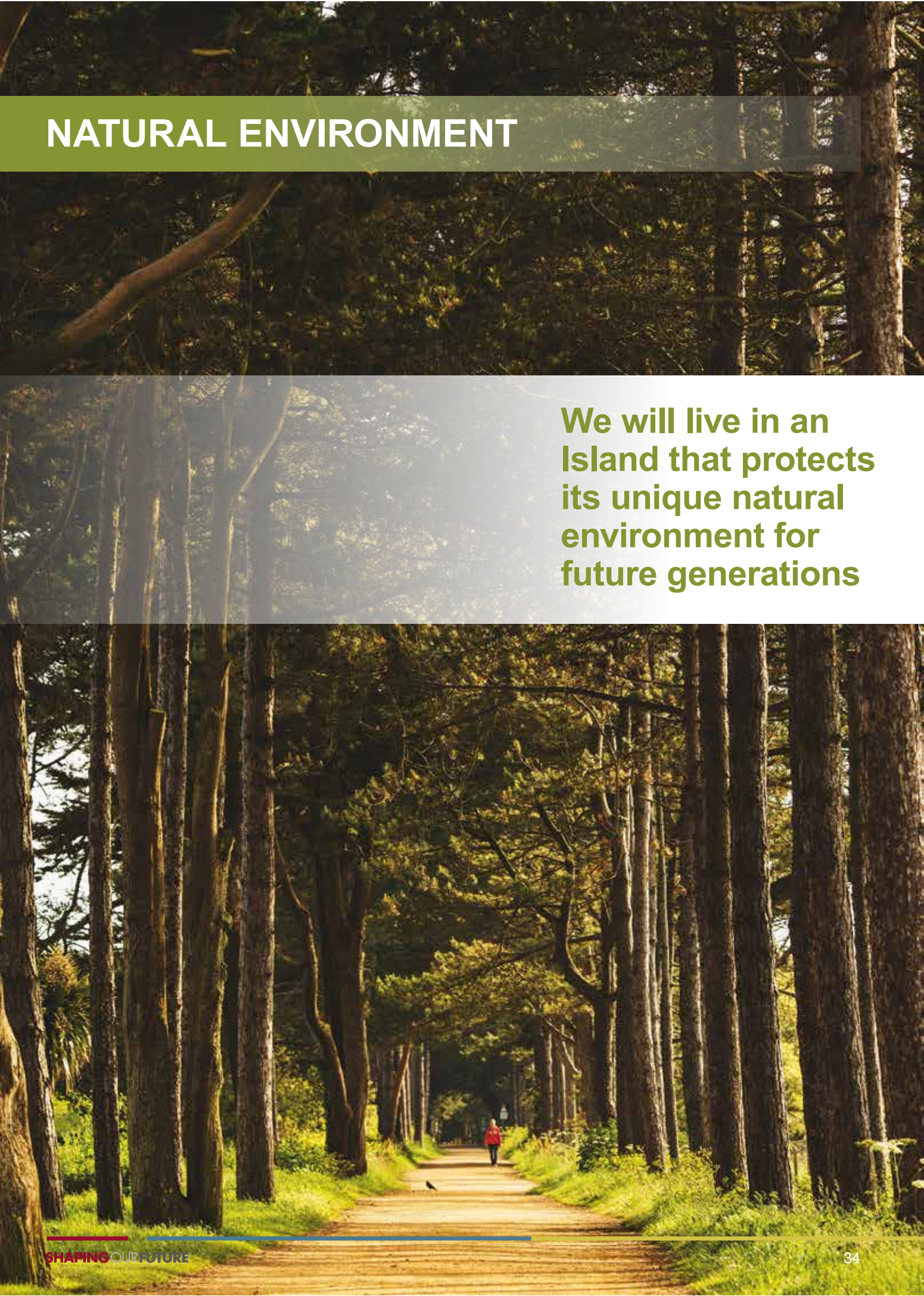
Data source: States Statistics Unit

Measures: % of journeys to work made by walking, cycling or public transport.

The facts: this has seen a significant increase compared to 2006 but momentum has slowed in recent years. The 2011 census found that 24% of people who lived and worked in St Helier used a car to get to work.

Long-term ambition: IMPROVE

Improving Jersey's performance with this indicator would help peak hour traffic congestion, air quality, energy use and greenhouse gas emissions. Active travel would also benefit health indicators, improve St Helier as a place to live and help mitigate the effects of any future population growth.



NATURAL ENVIRONMENT

We will live in an Island that protects its unique natural environment for future generations

Why is this outcome important?

Good stewardship means taking action to ensure that the natural environment so treasured by Islanders is available for future generations to enjoy. Despite the Island's small size, it contains an incredibly diverse range of natural habitats alongside our more built-up areas and many would argue that Jersey's countryside and coast contribute significantly to our quality of life.

What Islanders said: highlights from the 'My Jersey' survey 2016

Comments reflected the value people place on the beauty of Jersey's countryside and coast but the comments also reflected concern that increasing challenges might drive Jersey backwards.

Concern was frequently voiced that 'the jewel in Jersey's crown' is at risk from inappropriate development, and over-development, particularly in coastal areas. The survey highlighted perceptions that there is widespread development of green fields and that the Green Zone is being eroded.

Comments highlighted concerns about the exploitation of fish stocks, provision of adequate resources to manage and protect Jersey's marine environment and the link between nitrate discharging into St Aubin's Bay and excess green sea lettuce.

Fears were also highlighted over the vulnerability of Jersey's biodiversity, the impact of intensive farming practices and whether Jersey's wildlife is currently in decline.

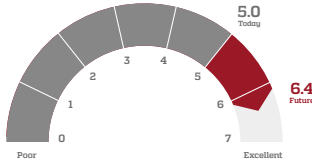
The topics covered in 'My Jersey'

Closing the gap

The dial plots the average score people gave Jersey today against the average score they'd be happy with in the future

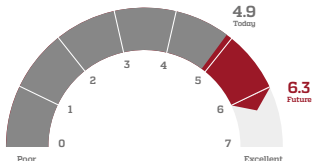
The beauty of Jersey's countryside and coast is protected

The beauty of Jersey's coast and countryside is integral to Jersey's attraction as a place to live, work and visit.



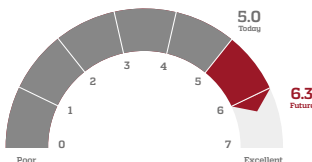
Jersey's marine environment is protected

Our marine environment is an intrinsic part of Jersey's history, our way of life, and our economy. We have one of the richest marine environments in Europe, home to a wide variety of marine species and habitats. If our seas are to continue to play this important role, a healthy marine environment is vital.

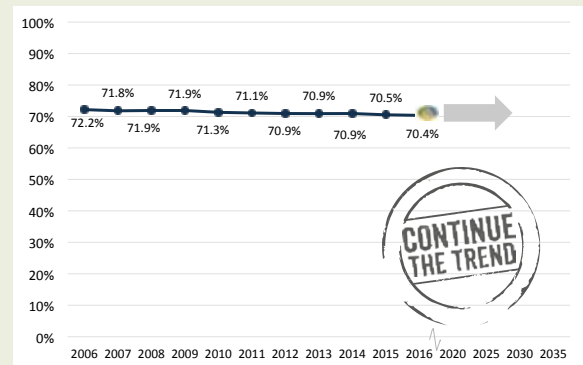


Jersey's wildlife, plants and habitats are protected

Despite its relatively small size, Jersey is highly prized for its rich and diverse habitats. Our geographical position and favourable climate has resulted in a mixture of British and European animals and plants found only in the Channel Islands.



Natural green space



Data source: Department of the Environment

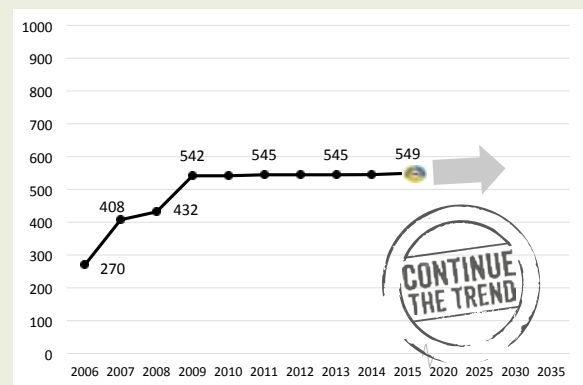
Measures: % of Jersey's surface area that consists of land classified as 'green space' (natural environment or land under cultivation).

The facts: the % of natural 'green space' in Jersey has reduced by 1.8 percentage points in the last ten years but over 70% of the Island still comprises 'green space'.

Long-term ambition: CONTINUE

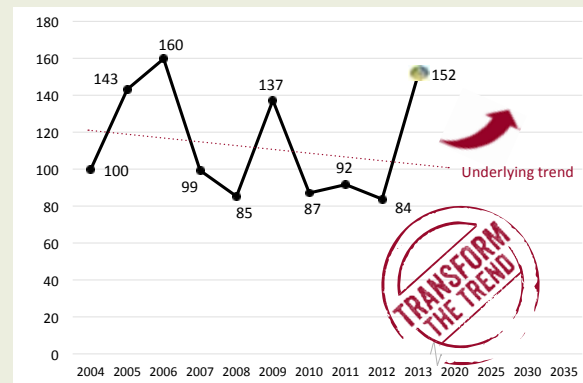
This reflects the strong views about protecting green space expressed by Islanders in 'My Jersey'. In setting this direction we must consider the Island's capacity to absorb its future development needs within the existing built environment. Progress helps meet important goals for water quality, wildlife habitat and Jersey's overall quality of life.

Protected Sites of Special Interest (SSI)



Data source: Department of the Environment

Butterfly abundance



Data source: Jersey Butterfly Monitoring Scheme

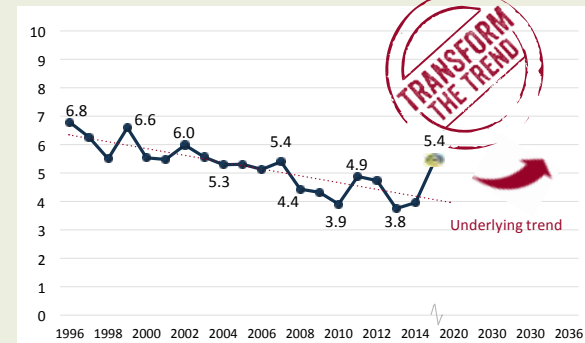
Measures: the abundance of 24 species of butterflies in Jersey using 2004 as a baseline with an index value of 100.⁹

The facts: butterflies are seen as an important 'barometer' of the health of our natural environment. The underlying trend showing that Jersey's butterflies are in overall decline (14% since 2004) is more significant than changes from one year to another. The only increasing populations occur in a handful of semi-natural sites. Habitat fragmentation is increasing the risk of local colonies being wiped out. Jersey and the UK have seen similar declines.

Long-term ambition: TRANSFORM

This reflects the importance of preserving our environment, as well as opinion in 'My Jersey' about protecting our wildlife, plants and habitats.

Breeding birds



Data source: Jersey Breeding Birds Survey

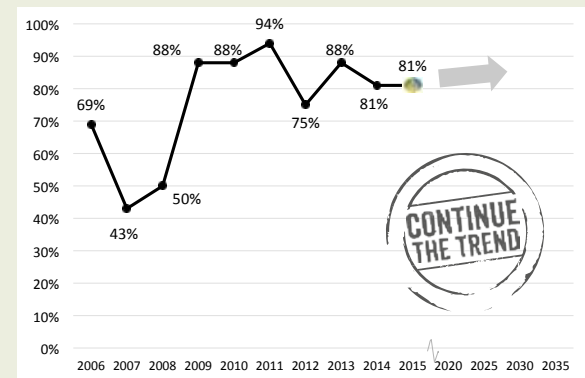
Measures: the average count of 44 species of birds per 1,000 metres across different habitat types.

The facts: like butterflies, birds are seen as an important 'barometer' of the health of our natural environment. Scientific monitoring by the Breeding Birds Survey shows that bird populations in Jersey's farmland/ suburban habitats have been declining rapidly since 1996. This is also happening in the UK. However, decline is not inevitable - populations of some bird species in Jersey's semi-natural habitats are increasing.

Long-term ambition: TRANSFORM

The direction reflects the importance of preserving our environment, as well as opinion in 'My Jersey' about protecting our wildlife, plants and habitats.

Marine water quality



Data source: Department of the Environment

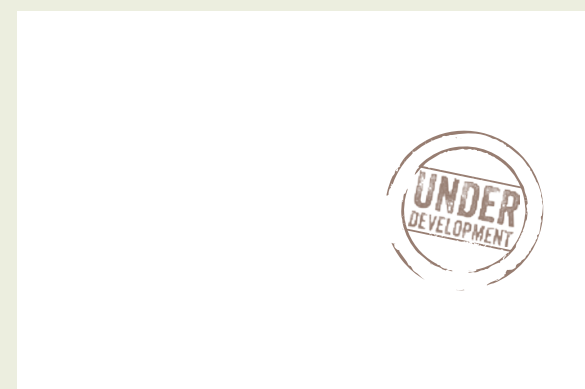
Measures: % of Jersey beaches achieving the European Bathing Water Directive Guide Standard.

The facts: since 2006, all Jersey's bathing waters have passed the European Bathing Water Directive Imperative Standard. In 2015, 81% passed the Guide Standard, which is 20 times more stringent. Compliance varies as it depends on rainfall and associated run-off from the land. The 2015 result was particularly positive because the summer was much wetter than usual.

Long-term ambition: CONTINUE

This aims to build on current progress. Good sea water quality means much more than having a nice place to swim. It is a habitat for economically and ecologically important species and a critical resource for our fishing and tourism industries.

Ramsar sites



Under development: Jersey is a signatory to the Ramsar Convention, which is an inter-governmental treaty for the conservation and wise use of wetlands and their resources.

Jersey has four designated Ramsar sites – the South-East Coast, Les Écréhous, the Paternosters and Les Minquiers. They comprise various habitats: reefs, boulder fields, mud, sandy and shingle shores not covered by water at low tide, combined with shallow tidal lagoons, seagrass beds and outlying reefs.

Positive progress against this indicator would serve as a proxy for the broader health of Jersey's marine environment.

⁹Indexing is a statistical technique to compare changing values over time. By giving the count of butterflies in 2004 a value of 100, subsequent changes in abundance can be shown as a percentage against this baseline. So, for example, butterfly abundance in 2012 was only 84% of that in 2004.

SUSTAINABLE RESOURCES



We will be an Island that uses and manages its natural resources responsibly

Why is this outcome important?

Our environment underpins every aspect of our lives – clean air, fresh water, protecting our resources and managing our waste are all vital to our health, wellbeing and quality of life.

What Islanders said: highlights from the ‘My Jersey’ survey 2016

Whilst Islanders recognised and valued the air quality Jersey enjoys, some concerns were expressed about the pollution caused by traffic, particularly in St Helier, and the emissions standards of older vehicles.

Islanders expect Jersey to achieve high standards of water quality and there was widespread concern at the apparent impact of the farming industry on the quality of Jersey’s water supplies. This is reinforced with so many properties relying on borehole water.

Many Islanders felt that Jersey should be doing more to exploit solar, wind and tidal energy opportunities. Many also wanted to see more recycling and were frustrated at the inconsistent approach to recycling across the parishes.

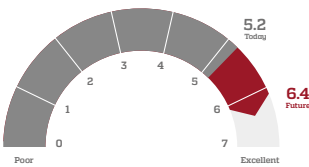
The topics covered in ‘My Jersey’

Closing the gap

The dial plots the average score people gave Jersey today against the average score they’d be happy with in the future

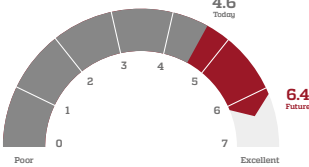
Jersey’s air is healthy to breathe

It is estimated that air pollution in the UK reduces the life expectancy of every person by an average of six months. It is easy to take Jersey’s clean air for granted but it is a key aspect of our quality of life.



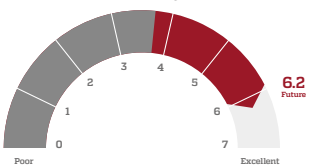
Jersey’s fresh water resources are clean and sustainable

Our water resources are all connected. Rainfall replenishes surface and groundwater, which is used for irrigation, feeds boreholes and reservoirs, maintains stream habitats and flows into the sea. Protecting the quality of this precious resource is vital.



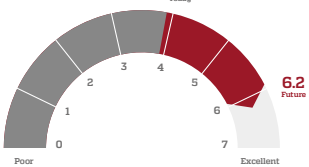
Jersey has secure, affordable and sustainable energy

Energy underpins many aspects of our daily lives. It is easy to assume that it will always be able to meet our growing demands but our individual and economic wellbeing depends on a secure, sustainable and affordable energy supply.

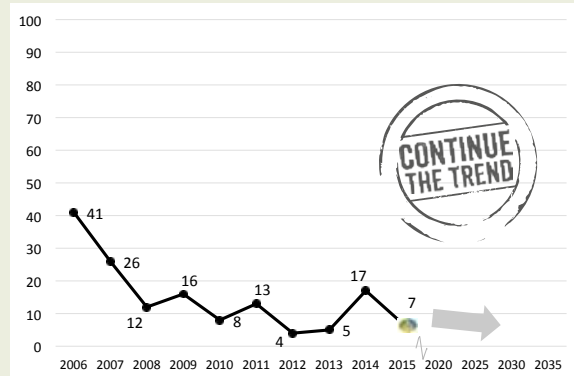


Jersey’s waste is managed appropriately

Waste is a misuse of resources. The materials and energy that go into the production and transport of the goods in the first place are lost if they could have been re-used and the costs of waste collection and disposal are high.



Air quality



Data source: Department of the Environment

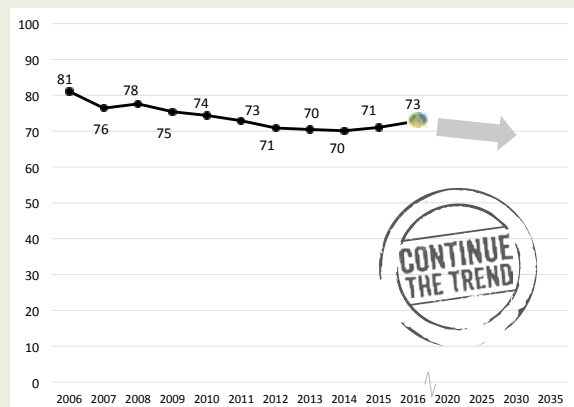
Measures: the number of times average monthly nitrogen dioxide (NO₂) concentrations exceed European Directive limits at any of Jersey's 22 monitoring sites in a year.

The facts: air quality typically meets international standards for over 90% of the year thanks to Jersey's prevailing weather and the absence of major industrial activity. Typically, about 90% of the sites have no breaches.

Long-term ambition: CONTINUE

'My Jersey' highlighted Islanders' fundamental expectation for clean air. We can further improve current performance by tackling traffic congestion.

Water consumption



Data source: Jersey Water

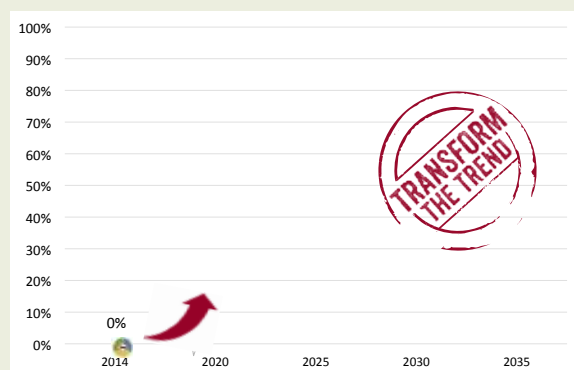
Measures: water consumption per person in Jersey. It is measured in thousands of litres.

The facts: the total volume of water supplied by Jersey Water has reduced slightly over the past decade despite an increasing population. Progress has been achieved through water saving initiatives and reducing leakage from the supply network. Introducing universal metering has also reduced demand due to changes in Islanders' water usage.

Long-term ambition: CONTINUE

This reflects the importance of using Jersey's water more efficiently and sustainably. This is essential in the face of a changing climate, with longer drier periods and more unpredictable rainfall.

Natural water quality



Data source: Department of the Environment

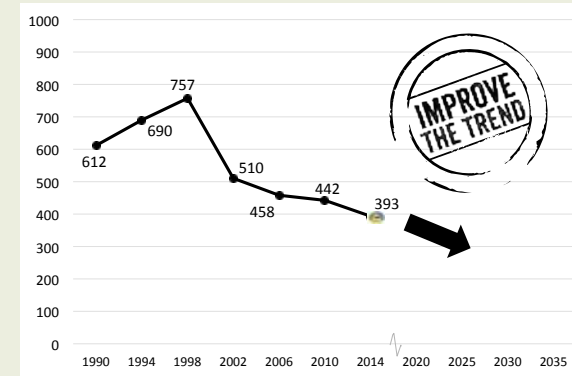
Measures: % of Jersey's Water Management Areas (WMAs) achieving good status for ground and surface water quality.

The facts: drinking water supplied by Jersey Water meets national compliance standards. Achieving these standards requires costly solutions to the condition of the raw water supply. Of Jersey's population, 10% rely on a private supply, such as a borehole. Jersey is divided into eight inland WMAs. The status of the surface and ground water in each WMA is scientifically assessed as good, moderate or poor. The lowest assessment determines the overall status of each WMA. All eight WMAs were assessed as poor for ground water quality in 2016. Half were also rated as poor for surface water quality.

Long-term ambition: TRANSFORM

This reflects the public's clear concerns and the benefits for health and the environment.

Greenhouse gas emissions



Data source: Department of the Environment

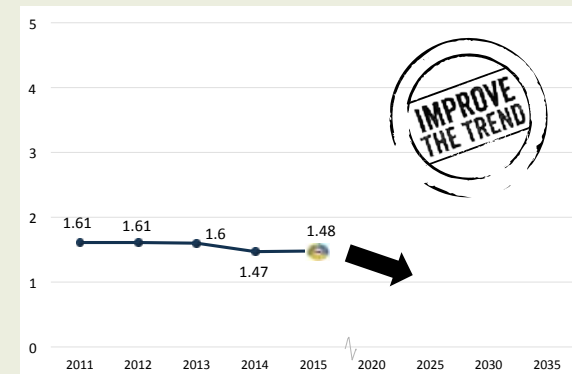
Measures: Jersey's emissions of greenhouse gases (measured in kilotonnes of carbon dioxide equivalent).

The facts: as a signatory to the Kyoto Protocol, Jersey has set a target to reduce its CO₂ emissions by 80% from 1990 levels by 2050. Between 1990 and 2014, Jersey achieved a 36% reduction in emissions, mainly due to the one-off switch from local electricity production to importation from France.

Long-term ambition: IMPROVE

This recognises that further savings will need to be made through reduced energy use and more sustainable fuel choices. Reducing greenhouse gas emissions is also associated with improved air quality and associated health benefits.

Energy use



Data source: States Statistics Unit

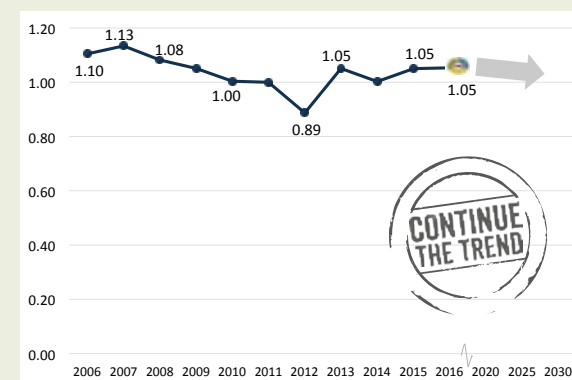
Measures: energy consumption in tonnes of oil equivalent¹⁰ (toe) per person in Jersey.

The facts: energy consumption per head of population in Jersey in 2015 (1.48toe) was below that of the UK (2.1toe) and has shown a small reduction since 2011.

Long-term ambition: IMPROVE

This reflects the ambition already set out in 'Pathway 2050' and Islanders' views in 'My Jersey' on energy affordability.¹¹ More efficient energy use will help protect households and businesses from the impacts of increasing international energy prices, as well as reducing Jersey's greenhouse gas emissions.

Waste management



Data source: Department for Infrastructure

Measures: the tonnes of non-inert waste produced per person.

The facts: Jersey currently generates over 100,000 tonnes of combustible 'non-inert' waste annually and has seen a slight reduction over the last decade. The internationally-recognised Waste Hierarchy prioritises waste reduction, reuse and recycling before energy recovery and disposal. Managing the amount of waste we produce is the starting point. Thereafter, we must appropriately balance re-using and recycling waste (currently 31%) and energy recovery, prioritising alternative solutions for materials unacceptable for energy recovery i.e. glass, metals and batteries.

Long-term ambition: CONTINUE

This aims to sustain the longer-term trend, recognising that economic recovery can lead to more spending and more waste generation.

¹⁰ A toe represents the quantity of energy released through burning one tonne of crude oil.

¹¹ 'My Jersey' highlighted expectations that Jersey should exploit its natural energy resources. 'Pathway 2050' outlines what is being done to prepare the way for utility scale renewable energy in Jersey.



AFFORDABLE LIVING

We will be an Island where people can afford a decent standard of living

Why is this outcome important?

A decent income is crucial for our quality of life because most basic needs – food, water, shelter, health care and many forms of recreation – have to be bought; affordable living is about being able to afford what you need to lead a healthy, happy and productive life.

What Islanders said: highlights from the ‘My Jersey’ survey 2016

Comments highlighted how people are concerned about disparity in earnings between different sectors of the economy, the impact of housing costs, the increasing gap between cost of living and earnings for many people and the impact this has on their life choices and quality of living.

The challenges faced by government were also acknowledged. Many people agreed that those in genuine need should be supported but felt that others took advantage of the benefit system. On the other hand, people who needed Income Support sometimes felt unfairly stigmatised.

Many people wanted government to do more to address costs that are beyond the control of individual households, such as housing.

The topics covered in ‘My Jersey’

Islanders can independently afford a decent standard of living

Low income households spend a greater proportion of their income on everyday essentials compared with better-off households so their standard of living is more sensitive to the cost of these goods and services and price rises.

Islanders who need help to achieve a decent standard of living are supported

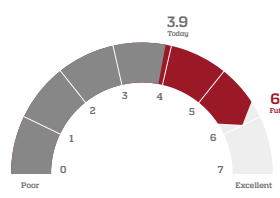
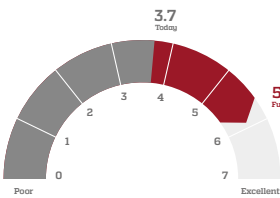
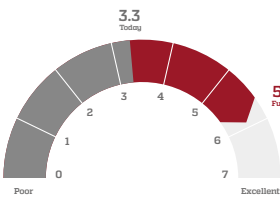
The most vulnerable need support to ensure adequate provision to meet their needs and, where appropriate, to give them the opportunity or means to help themselves or cope in difficult circumstances. It also means helping address living costs that are beyond the control of individual households.

Jersey has a stable and low rate of inflation

Low inflation helps keep our economy competitive. While many factors outside our control influence inflation, there is much we can do locally to curb it.

Closing the gap

The dial plots the average score people gave Jersey today against the average score they'd be happy with in the future



Disposable income



Data source: States Statistics Unit

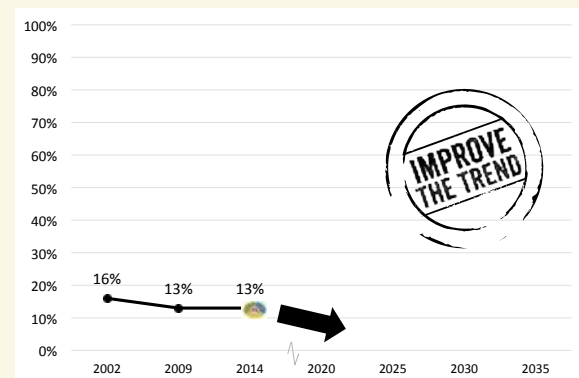
Measures: median household income after the application of the tax and benefit system.¹² It is adjusted ('equivalised') to take into account differences in household size and composition. The figures are adjusted for inflation so different years can be compared like-for-like.

The facts: although average household income in Jersey was about 50% higher than in the UK in 2014/15, it has not kept pace with inflation over time.

Long-term ambition: TRANSFORM

75% of household income in Jersey is from employment earnings so productivity, participation, increasing skills and new, higher value employment opportunities are key to shifting the current trend.

Relative low income



Data source: States Statistics Unit

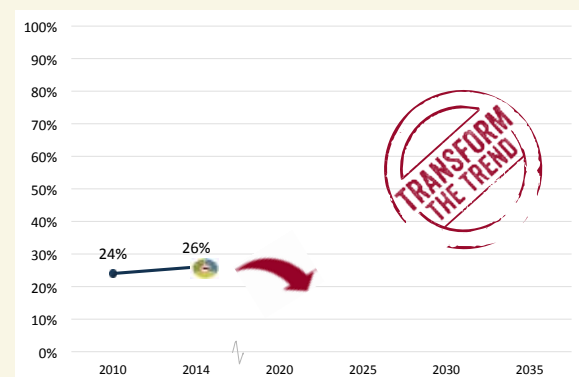
Measures: % of Islanders who live in households that earn less than 60% of median equivalised household income – before housing costs (BHC).¹³

The facts: the % of Islanders living in relative low income households (BHC) improved between 2002 (16%) and 2015 (13%) and is better than in the UK (16%). Once housing costs are taken into account, however, the picture changes significantly. The % of Islanders living in relative low income households went from 19% in 2009/10 to 23% in 2014/15 – higher than the UK at 21%.

Long-term ambition: IMPROVE

Building on current progress through improved employment opportunities and planning for retirement, in combination with a tax and benefits system that helps reduce income inequality, provides the platform for tackling the pressures caused by housing costs.

Coping financially



Data source: States Statistics Unit

Measures: this indicator complements the one on relative low income by measuring the % of households who report finding it 'quite' or 'very difficult' to cope financially.

The facts: in 2014, 20% of households reported finding it 'quite difficult' to cope financially and 6% 'very difficult'. There was no significant difference to 2010. By comparison, about 7% of households across the EU reported 'great difficulty' and another 38% some degree of difficulty in making ends meet.

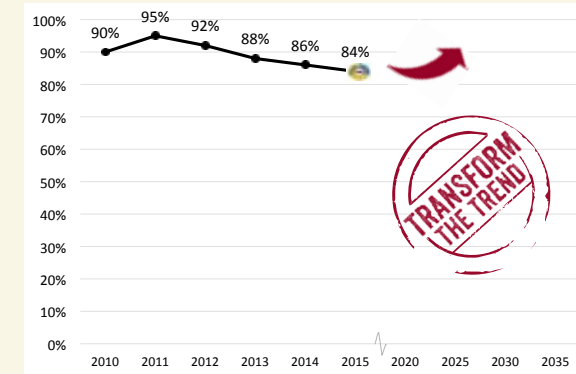
Long-term ambition: TRANSFORM

Improved performance against this indicator benefits a variety of health and wellbeing indicators and supports Jersey's appeal as a place to live and work.

¹² The median is the point at which half of households have a lower income and half have a higher income.

¹³ According to the Office for National Statistics in the UK, the indicator measures 'low income in comparison to other people, which in itself does not necessarily imply a low standard of living'. It does not denote 'poverty'.

Cost of buying a home



Data source: States Statistics Unit

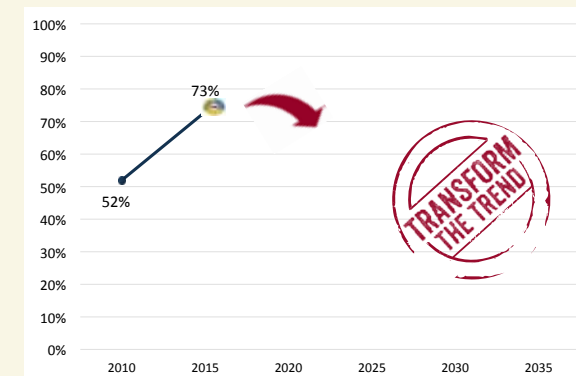
Measures: % of a mortgage on a median priced dwelling in Jersey that a household with an average income would be able to service 'affordably'.¹⁴

The facts: since 2006, a working household in Jersey with average net income has not been able to afford to service a mortgage on a median-priced house of any size but could do so on median-priced one and two-bedroom flats.

Long-term ambition: TRANSFORM

'My Jersey' highlighted concern that home ownership is increasingly out of reach for many. Finding solutions to this problem contributes to several health and wellbeing indicators and Jersey's appeal as a place to live and work.

Rental stress



Data source: States Statistics Unit

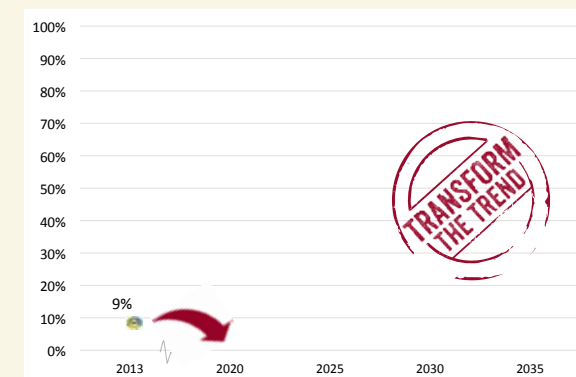
Measures: % of lower-income households living in qualified private rental accommodation that are in 'rental stress' (paying more than 30% of their gross income on rental costs).

The facts: for lower-income households especially, high housing costs relative to income often lead to financial hardship. The proportion of households in 'rental stress' increased from 52% to 73% between 2010 and 2015.

Long-term ambition: TRANSFORM

This reflects concerns in 'My Jersey' that the cost of buying homes is forcing Islanders into an expensive private rental market.

Relative consumer prices



Data source: States Statistics Unit

Measures: % difference in the cost of purchasing a common basket of consumer goods and services (excluding housing, health and education) in Jersey and the UK.

The facts: in 2013, price levels in Jersey were 2% greater than in London but 9% greater than the UK average. Differences ranged from 8% less in Jersey for clothing and footwear to 19% greater for food and non-alcoholic drinks.

Long-term ambition: TRANSFORM

2013 was the first time this comparison was made so no trend data is currently available. The proposed ambition would improve affordability and support other wellbeing indicators.

¹⁴ A figure of 100% implies that a household at the mean level of income may be considered to be able to service a mortgage on a median priced dwelling 'affordably'.

ATTRACTIVE BUSINESS ENVIRONMENT

We will be an attractive place to do business

Picture Courtesy of the Jersey Evening Post

Why is this outcome important?

Jersey must compete against many places to attract and retain companies and skilled workers. Maintaining an attractive and competitive business environment is essential if our economy is to continue to provide employment and funds for our infrastructure and services.

What Islanders said: highlights from the ‘My Jersey’ survey 2016

The results showed Islanders recognise Jersey cannot stand still as a place to do business. Many acknowledged the importance of improving the Island’s skills base and developing and retaining local talent, although some highlighted the value of bringing in skilled people to support new and existing businesses.

Many comments focused on improving digital skills and the cost of Internet access. People were keen to see progress in development of the digital sector and there was an expectation that government should provide more services online.

There was a perception that bureaucracy, recruitment issues and commercial rents hindered business enterprise. Others commented on the importance of economic diversification and attracting the right type of inward investment.

It was acknowledged that Jersey’s tax rates compared favourably to the UK but this was largely drowned out by Islanders feeling ‘middle earners’ disproportionately carried the tax burden. Tax assessment methods and the introduction of new charges both came in for criticism.

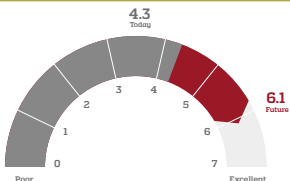
The topics covered in ‘My Jersey’

Closing the gap

The dial plots the average score people gave Jersey today against the average score they’d be happy with in the future

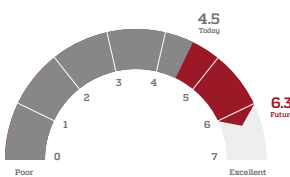
Jersey has a skilled workforce, aligned to the needs of the Island

As a small, service-based economy, Jersey relies on skills to be globally competitive. Skills are critical to improving productivity and sustainable economic growth. This not only links to educational achievement but also work-based training and attracting skilled migrants.



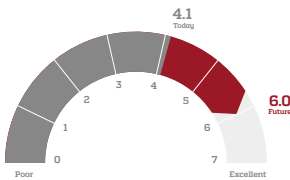
Jersey is a digitally connected island

Modern digital infrastructure is vital if Jersey is to keep up with new technologies, as it provides guaranteed data speeds for business and residential customers, as well as enabling quicker, and higher capacity, connections to the internet.



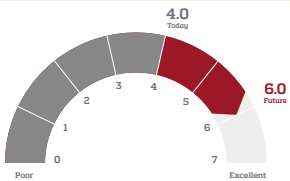
Jersey encourages new business, inward investment and competition

Business enterprise, driven by local businesses, entrepreneurs, and inward investors can help create new job opportunities, improve productivity and increase competition, so benefiting consumers.

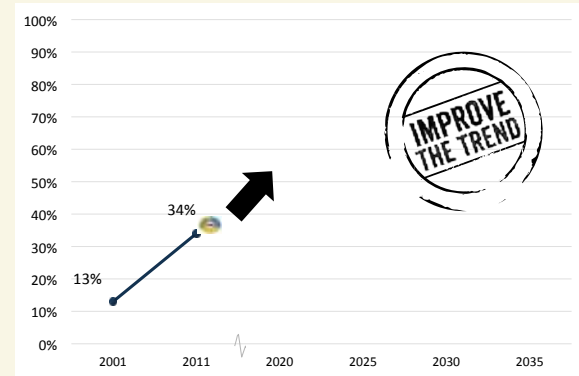


Jersey is a great place for businesses to innovate and be creative

Innovation - introducing new products and services; new ways of working, or improved organisational structures - can help Jersey’s economy grow. The OECD estimate that innovation accounts for 25-50% of productivity growth in developed economies.



Skilled workforce



Data source: States Statistics Unit

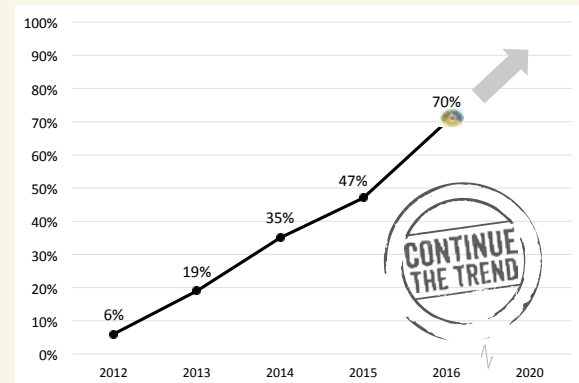
Measures: % of Jersey's workforce who hold a post-secondary educational qualification.

The facts: average skills in Jersey are improving, with each generation gaining more skills than their predecessors. However, Jersey is behind the average for UK cities and other international competitors. In 2011, 34% of our working age adults had post-secondary qualifications. Another 14% were educated to A-Level standard. 20% had no educational qualifications. Migration also shapes this profile. From 2005 to 2011, 42% of non-Jersey working age migrants had post-secondary qualifications. Nearly 20% had no qualifications.

Long-term ambition: IMPROVE

Improving our skills profile through education and migration targeted at the skills Jersey needs will benefit business growth and productivity while contributing to financial independence and other wellbeing indicators.

Digital infrastructure



Data source: JT Global

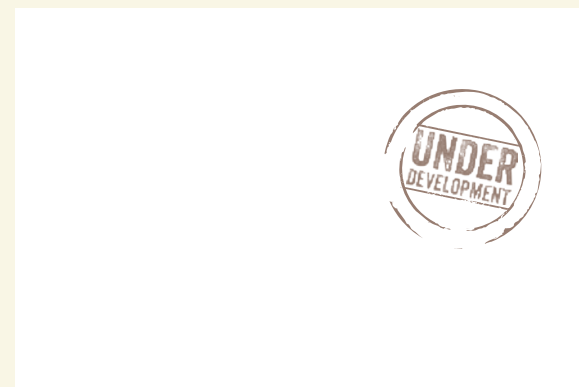
Measures: % of Jersey properties covered by fibre optic infrastructure.

The facts: an Island-wide roll-out of 'fibre to the home' has seen 24,000 Island homes and businesses connected between 2012 and 2016. The aim is to complete the programme by 2019.

Long-term ambition: CONTINUE

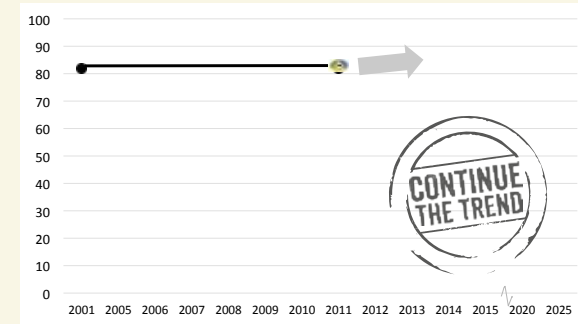
Jersey is third in the world for the % of broadband customers directly connected to the internet with fibre-optic cabling. Progress improves Jersey's appeal as a place to live and do business, and creates opportunities to improve health, education, productivity and participation indicators.

Business start-ups



Under development: This is used internationally to gauge the level of entrepreneurial activity in an economy.

Economic participation



Data source: States Statistics Unit

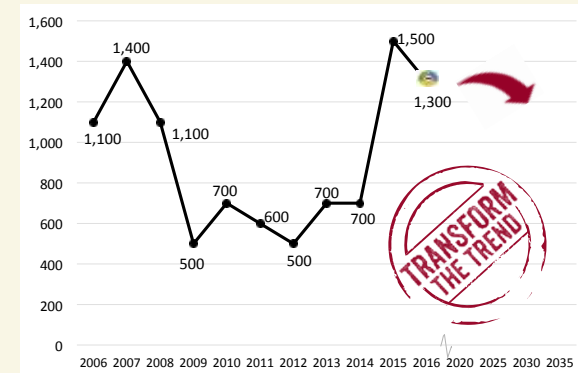
Measures: % of Jersey's working age population who are economically active.

The facts: the 2001 and 2011 censuses both showed a participation rate of 82%. Although this rate is high, about one in ten working age people were unable to work due to sickness or disability, had retired early or were looking after the home.

Long-term ambition: CONTINUE

Identifying opportunities to improve Jersey's labour supply by removing barriers to participation could lessen demand for inward migration. This would also help benefit affordability, productivity and life satisfaction indicators. We must also consider the implications of an ageing workforce and a rise in chronic health conditions.

Net migration



Data source: States Statistics Unit

Measures: the annual difference between migration into and out of Jersey.

The facts: between 2009-2014, net migration averaged just over 600 a year against a planning assumption of +325. In 2015, however, the net increase was 1,500 as our economy grew.

Long-term ambition: TRANSFORM

The level of migration seen in 2015 is unsustainable. However, employers need staff with skills and experience that are not available locally, and Islanders and their families will continue to return to Jersey. The focus must be on migration which adds the greatest economic and social value, while also promoting policies that reduce demand for new migrants, including skills investment, and manage the impact on services and the environment.

JOBS AND GROWTH

We will benefit from a strong economy and rewarding job opportunities

Why is this outcome important?

An economy is successful if it can provide high income jobs and keep people in work. Increasing the proportion of higher value jobs in our economy entails encouraging our talented people to remain here for employment and to progress up the skills ladder, and attracting others to Jersey who can help businesses grow, become more productive and help create better employment opportunities for Islanders.

What Islanders said: highlights from the 'My Jersey' survey 2016

Much of the comment focussed on a perceived lack of diversity in career opportunities, the disparity in earnings between financial services and many other sectors of the economy and the difficult life choices that could ensue because of the cost of living in the Island. Others emphasised that reward should not be linked exclusively to pay as the nature of work was often rewarding in itself.

Finance was widely perceived as a successful business sector and there was acknowledgement of its importance to Jersey economy. Much of the comment focussed on the challenges faced by businesses operating in other sectors, particularly in the face of high costs and competition from larger UK companies.

The topics covered in 'My Jersey'

Islanders can access rewarding jobs

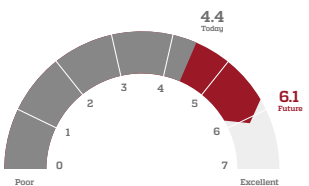
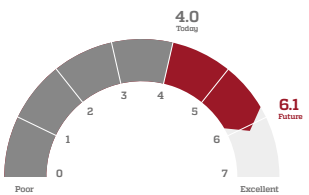
The availability of good jobs with decent earnings is important to our quality of life. Encouraging home-grown talent to build successful careers in Jersey and attracting people with essential skills to help businesses develop will ensure job opportunities exist at all levels for Islanders.

Jersey businesses are successful and productive

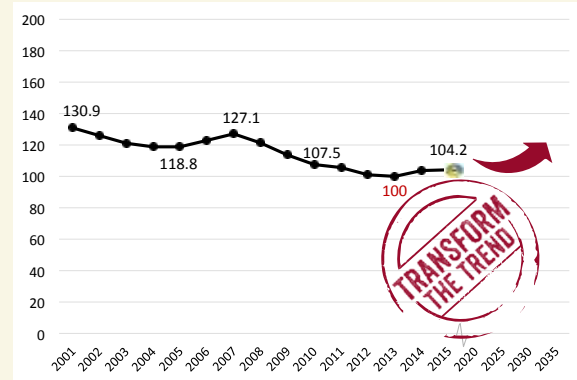
The Island's productivity growth will play a vital role in raising Jersey's economic performance and competitiveness, improving public finances and ultimately raising our standard of living and quality of life. Productivity is important to employees because of its link to wages and to firms given its link to profit.

Closing the gap

The dial plots the average score people gave Jersey today against the average score they'd be happy with in the future



Economic output



Data source: States Statistics Unit

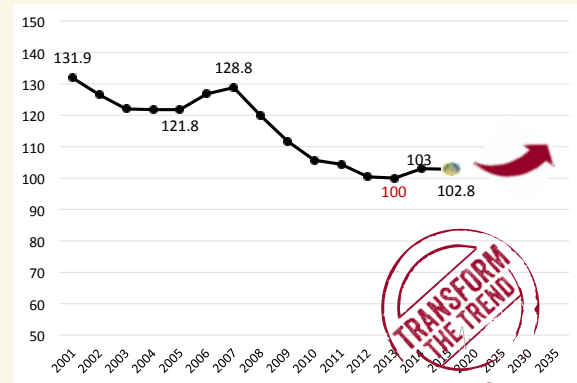
Measures: the total value of Jersey's economy divided by population. Indexing against 2013 (value =100) allows comparison between years.

The facts: careful interpretation of this headline indicator is required. Cyclical fluctuation between periods of growth and contraction should be expected and it is also important to understand changes within different economic sectors. If, for example, the impact of low interest rates on financial services profits is taken into account, Jersey's GVA is now above its 2006 level.

Long-term ambition: **TRANSFORM**

Sustained economic growth is essential if Jersey is to meet the cost of future challenges and meet Islanders' expectations for higher incomes, greater job opportunities, low tax rates and quality services.

Productivity



Data source: States Statistics Unit

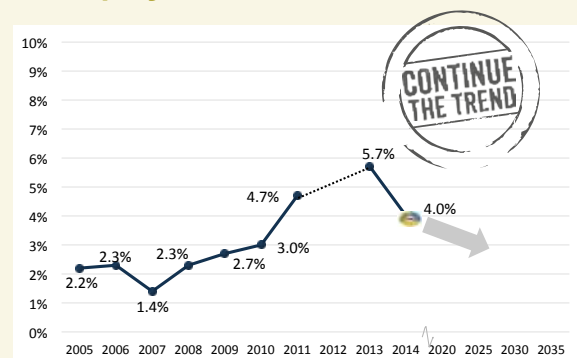
Measures: Jersey's productivity by dividing economic output by the number of employees (full-time equivalent). It is indexed against 2013 (value = 100) to allow comparison between years.

The facts: the Island's independent Fiscal Policy Panel has highlighted that Jersey's productivity performance has shown no real increase for a sustained period. Falling profitability as a result of low interest rates in the banking sector is a factor but, outside of finance, productivity in the rest of the economy has only increased marginally since 1998.

Long-term ambition: **TRANSFORM**

Jersey is a small island with limited land availability and capacity for population growth. Improving productivity by making the best possible use of our existing resources will be key to achieving sustainable economic growth and our standard of living.

Unemployment



Data source: States Statistics Unit

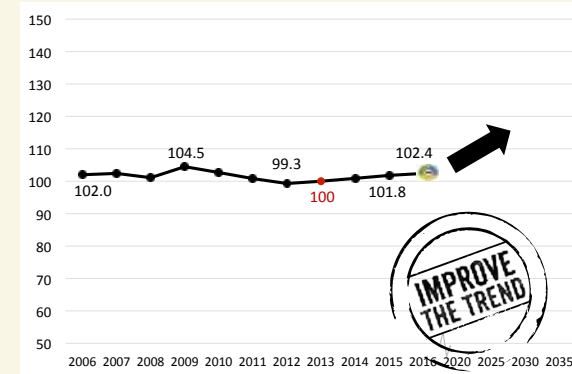
Measures: the estimated number of unemployed plus those not registered but still seeking work as a % of the entire workforce.

The facts: Jersey's unemployment rate between April 2014 and May 2015 was estimated at 4%. Between March and May 2015, the rate in the UK was 5.6%. Monitoring the number of people actively seeking work provides some insight into the likely trend. In December 2016, this figure was at its lowest for six years.

Long-term ambition: **CONTINUE**

This recognises the impact of the global recession and focuses on the more recent trend. Progress will benefit economic participation, productivity, affordable living and other wellbeing indicators.

Average earnings



Data source: States Statistics Unit

Measures: the change in the value of average earnings allowing for the effect of inflation. It is indexed against 2013 (value =100) to allow comparison between years.

The facts: real earnings have now returned to the same level as before the global financial crisis and increased faster than inflation for four out of the last five years. This recovery is not, however, consistent across all sectors of the economy.

Long-term ambition: **IMPROVE**

Productivity-led growth will be key to improving average earnings. Progress benefits economic participation, productivity and other affordable living and wellbeing indicators.

The story behind the trends

The 58 'Island Indicators' have been chosen to help people measure Jersey's progress over time.

Where possible, they use data that is already available and mirror indicators used elsewhere so we can also compare Jersey to other places.

However, no headline indicator can tell the full story about the causes and forces at work behind the trend. Each requires supporting information - secondary indicators - to help understand what is going on and why. For example:

- **Jobs and Growth** - we need to understand the contribution made by different sectors of Jersey's economy (agriculture, digital, financial services, hospitality, retail, etc.) to economic output, productivity, and business start-ups, earnings, net migration and jobs.
- **Safety and Security** - in order to understand the trend in overall crime, we also need data about changes in different types of crime, offender profiles (ages, etc.), re-offending rates, etc.

A shared vision requires shared effort

Focusing on long-term outcomes that make a difference to our quality of life, from addressing loneliness to protecting local wildlife from extinction, highlights the shortcomings of fragmented efforts to find solutions.

If Jersey is to make progress towards its vision, government departments, businesses, voluntary organisations and the wider community must all work together.

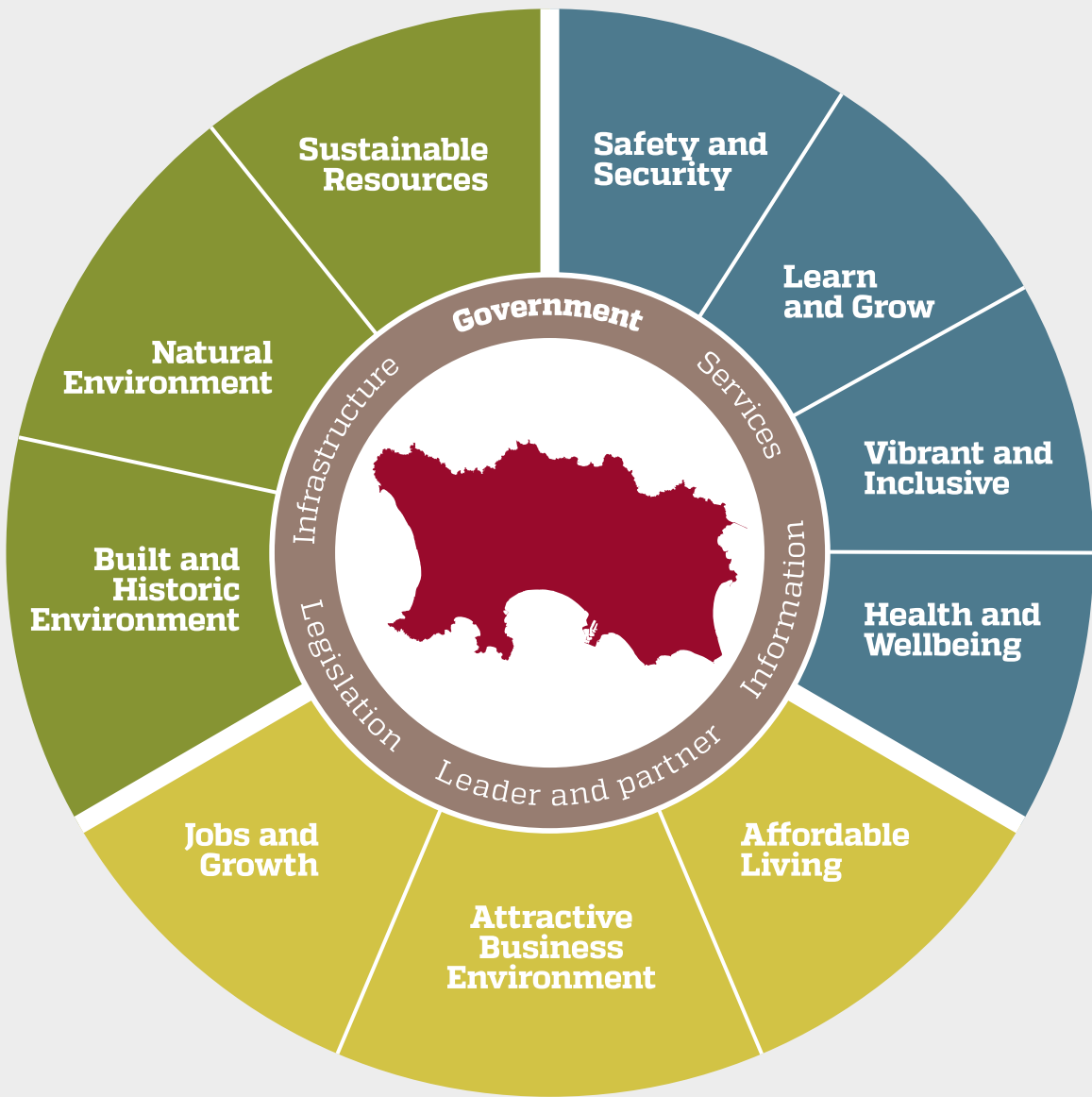
Take, for example, the Health and Wellbeing Outcome - 'we will be an Island where people enjoy long, healthy, active lives'. Many government departments, not just Health and Social Services, as well as partner groups contribute towards achieving this outcome. But progress also depends on our individual lifestyle behaviours and choices.

One Island, one vision

A picture of 'who does what' will be critical. Key stakeholders and their particular roles will need to be identified. Our combined efforts must take into account the vision as a whole, not just individual Island Outcomes.

To this end, any organisation or strategy can be placed at the heart of the vision framework (see below) to see how its work affects Jersey's community, environment and economy.

This approach also helps identify the impact of issues such as climate change or an ageing population on our Island. And putting children at the centre, for example, promotes thinking not only about education but their safety, health, access to sport and culture, and their housing.



An example of how the vision can work

Jersey is already following the outcomes approach to develop an **Jersey Early Childhood Development Programme (JECDP)**.

Since 2016, UBS Optimus Foundation UK has funded National Children's Bureau to work with the States of Jersey and Jersey Child Care Trust to deliver the JECDP programme.

Within the vision, this work will support the 'Learn and Grow' outcome:

Outcome	In 2037, our children will enjoy the best start in life.
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How can we measure if this is happening?

The JECDP helped select indicators for the early years' aspect of this outcome - including breastfeeding.¹⁵

Indicator	Breastfeeding
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How is Jersey doing?

The JECDP researched the trend in breastfeeding, national benchmarks and other data to help interpret it.

The trend	The data showed that there has been only a marginal improvement in breastfeeding rates over the last five years.
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What is the story behind this trend?

A range of stakeholders were invited to discuss the evidence and examine the causes behind the trend.

The story	They identified local issues such as high maternal age, high rates of working mothers, high caesarean rates, maternity legislation and a lack of universal antenatal preparation. They forecast that the trend was likely to continue unless we do things differently.
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Who are the partners with a role to play in doing better?

The partners who needed to be involved in improving the current trend were identified, including:

Partners	<ul style="list-style-type: none">• parents / parents-to-be• midwives• GPs and paediatricians• businesses• charities• Social Security• education practitioners• 1001 Critical Days Agenda• early years providers
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What could help improve the trend?

The partners identified a raft of ideas that could help Jersey do better¹⁶, including:

The plan of action	Implementation of the UNICEF Baby Friendly Initiative, introducing a universal antenatal preparation programme, reviewing family friendly legislation and 'low cost/ no cost options', such as peer support training and provision.
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What are the benefits of success?

Evidence shows that improving the current trend in breastfeeding has long-term benefits for several different 'Island Outcomes', including 'Learn and Grow', 'Health and Wellbeing' and 'Affordable Living'.

¹⁵ The other indicators included birthweight, child obesity.

¹⁶ All of these ideas are currently being considered by the JECDP Steering Group.

Vision: the role of government

The purpose of the vision is to set direction for the Island as a whole. In doing so, it also provides clarity for what government needs to work towards - not during just one political term of office but over the longer-term.

Government cannot deliver outcomes such as 'Health and Wellbeing' or 'Jobs and Growth' on its own, but it must be able to demonstrate its impact on these 'big picture' issues.

This is why government sits at the heart of the vision framework. Good government itself is not an outcome, rather it is a vital means to an end – achieving the outcomes. Government can make an important difference to each of the outcomes if it develops the right strategies, policies and services – and delivers them well.

From vision to action

In defining its contribution towards each outcome, government will make decisions about what it would take to succeed and what level of progress is feasible - and affordable - in the short, medium and longer-term. Its chosen course of action will be set out in medium-term priorities and detailed social, economic and environmental delivery strategies, each based upon a combination of these roles:

Leader and partner

- set strategy, policy and plans to meet current/ future needs
- work with stakeholders to address shared interests
- promote and represent Jersey externally

Infrastructure

- invest in and manage public infrastructure and land

Services

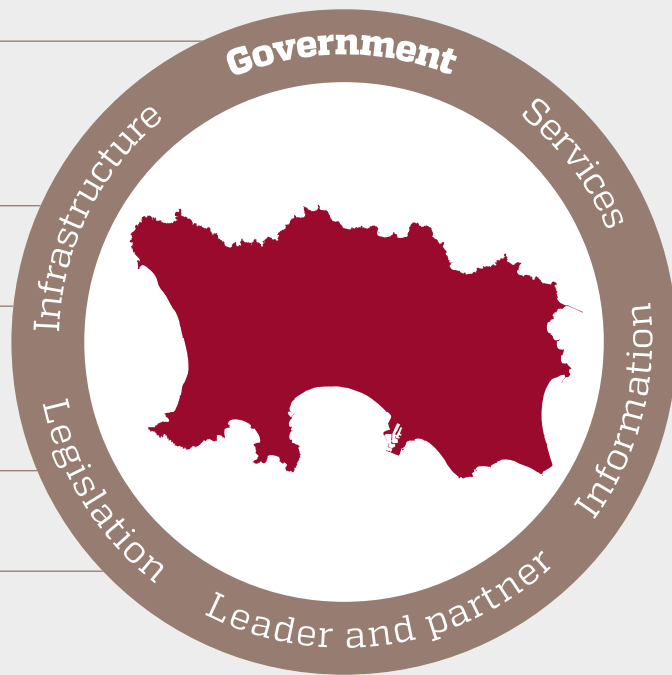
- fund and provide public services
- fully or part fund partners to provide services
- establish independent regulatory services

Legislation

- develop and enact legislation

Information

- gather and use data to inform decision-making
- provide information to inform stakeholders and the public



Government performance

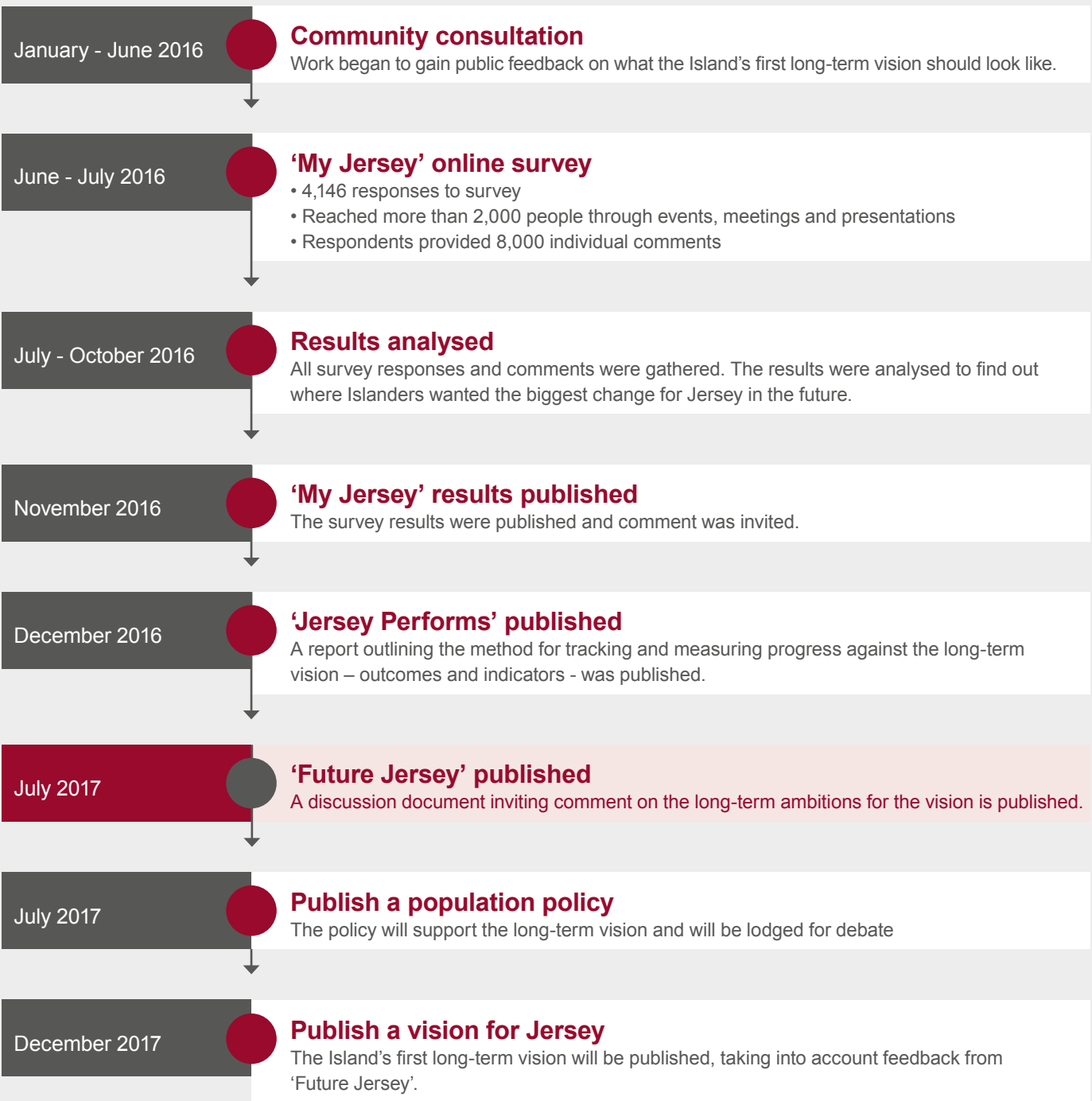
Government is already accountable for developing good strategies and policies, and implementing them well. The vision will provide the focal point for a new planning and performance system to ensure these strategies:

- are properly aligned to the vision and each other
- take into account the needs and aspirations of the community
- provide a joined up approach to challenges such as climate change
- bring partners together to make a difference and avoid duplication of effort
- make efficient and sustainable use of public funds
- are subject to ongoing monitoring and evaluation

What happens next?

'Future Jersey' is the latest step in the consultation process designed to produce a long-term vision for Jersey. So far, the process has engaged with nearly 11,400 Islanders.

Where are we in the process?



'Shaping Our Future' consultation process

Public consultation is essential if the long-term vision is to be compelling and have widespread support.

This discussion document continues the 'Shaping Our Future' consultation process started over a year ago and provides another opportunity for Islanders to have their say on where they want Jersey to be in the future.

The level of participation in the consultation so far already stands comparison with the best seen elsewhere. This is testament to the importance of Jersey's future to the community.

The process began in March 2016 with more than 150 stakeholder organisations being invited to briefings to introduce the new approach to planning Jersey's future. Each organisation has unique insights into the Island's way of life and an important contribution to make.

Presentations were made at briefings run by partner organisations, such as Jersey Business; the team attended events and manned pop-up stands around the Island; and the consultation was promoted on social media.

Then, over a period of six weeks in June and July last year, nearly 4,150 Islanders took part in the 'My Jersey' survey, adding 8,000 comments, in one of the Island's biggest public consultations.

The survey asked Islanders to say what they think of Jersey now and their hopes for the future. This feedback has been invaluable in taking the next step towards creating the long-term vision.

To date, there have been over 12,600 visits to www.shapingourfuture.gov.je and as the vision starts to take shape, the website has been updated with all the information from 'Future Jersey', giving Islanders another important opportunity to have their say.

Is the long-term vision heading in the right direction?

Please go to www.shapingourfuture.gov.je to leave your feedback. The closing date for comments is Wednesday, 4th October 2017.

Thinking about Jersey's future

About 17,000 of us are over-65 - it will be nearly 28,000 by 2035.

It's great we're living longer, but pensioners typically need four times more healthcare. How will we pay for this?

60% of disabled Islanders find it difficult to take part in community activities.

And 41% of them find it difficult to get around Jersey - how can we help?

I'm concerned about our environment - our natural water is in poor condition, and biodiversity is suffering.

Less intensive farming could make a difference - is this an option for our farmers?

There are too many cars on Jersey's roads.

43% of us drive to work on our own - is this part of the problem?

Living on an Island is always going to be more expensive.

Should our food and non-alcoholic drinks really cost an average of 19% more than in the UK?

More Islanders now reach retirement age each year than leave school.

Limiting migration to 'one in, one out' could mean 7,000 fewer working age people by 2035. That would affect employers, tax and pensions.

www.shapingourfuture.gov.je

