



# **Brexit Residents' Survey 2017**

## **Research Report**

## **Foreword**

Following the UK's decision to leave the EU, the Government of Jersey has been working to ensure the Island's interests are understood, considered and protected by the UK in its negotiations.

To inform this, we have set up a number of channels through which both residents and Jersey businesses can tell us what they think about Brexit – what their concerns are and where they think the opportunities for Jersey might lie. The Let's Talk Brexit Campaign, launched in March this year, has played an important role in facilitating this discussion and feedback, and as part of this we undertook the Brexit Residents' Survey in May. I am now delighted to be able to share the results of that survey.

The survey was completed by over 800 residents, and the responses have helped to provide clarity on the most pressing issues for Islanders, as well as the areas where respondents think Jersey has the potential to benefit over the coming months and years.

A clear message from the survey, and a theme reiterated through other Let's Talk Brexit channels, is that many Islanders are concerned that Jersey's interests will not be adequately represented in the UK's negotiations with the EU. I can assure you that we are fully aware of this concern. Our diplomatic efforts are being widely directed and no stone will be left unturned.

As the Brexit negotiations progress, the Government of Jersey will continue to engage Islanders through the Let's Talk Brexit campaign. Alongside the publication of this report, we will produce an accessible online presentation and will share the results across social media platforms. Drawing on public feedback we will also distribute a regular electronic newsletter – ensuring that Islanders are provided with the timeliest and most relevant Brexit information, in the most convenient format.

I express my thanks again to all who have contributed so constructively to the campaign, and whose views are included in this report.

**Senator Sir Philip Bailhache**  
**Minister for External Relations**

September 2017

## **Objectives**

The broad objectives of the research were as follows:

- Determine the place of birth, socio-economic and demographic profile of residents, and the type of passport they hold to check the survey sample is representative of the adult population, and to analyse the results by different sub-samples of respondents.
- Examine the reasons people move to and from Jersey, including periods of residency in the Island, attitudes to immigration and the potential impact of Brexit on these areas.
- Find out more about resident travel off-Island and the importance of visa-free travel.
- Investigate attitudes toward and perceptions of the potential impact of Brexit on Jersey.
- Assess the level of understanding of Brexit issues, whether additional information would be helpful and the best channels of communication.

## **Methodology**

In order to attract as large and representative sample as possible, paper-based and online surveys were made available. Self-completion questionnaires, together with reply-paid return envelopes were distributed to the Island's Parish Halls, as well as other consumer-facing organisations on 2nd May 2017. An online version of the survey was also promoted through online and traditional media channels.

By the cut-off date of 31st May 2017, 846 questionnaires had been completed; 76 by post and 770 online. This represents approximately 1% of Jersey's adult resident population aged 15 or over.

## **Notes**

When interpreting the results, it should be noted that although the total sample size is large, it only represents a small proportion of adult residents and there are some biases in the sample of respondents when compared with Jersey's adult resident population, as evidenced in the 2011 Census. These biases are illustrated in Section 1, with the main resident segments under-represented being those aged under 24 and those from Portugal/Madeira. Nevertheless, a broad range of residents are represented within the sample, lending some confidence that the overall results are generally reflective of the views of Islanders.

Results within the report have been broken down by type of resident, and some sub-sample sizes used in the analysis are quite small and therefore subject to a greater degree of statistical variation.

## Summary of main findings

### Section 1 - Residential profile and reasons to move to the Island

In carrying out the Brexit Residents' Survey, we sought to ensure that the results presented an accurate picture of the opinions and concerns of all Islanders. To help guarantee a representative sample we promoted the survey online, as well as providing hard copies in all Parish Halls, the Citizen's Advice Bureau and at 'pop-up' events around the Island.

A broad mix of age groups and nationalities responded to the survey, with just over half of the sample indicating they were born in Jersey. This compares favourably with the most recent Census results which showed that 43% of the Island's adult population were born in Jersey, and therefore helps to provide confidence in the broad accuracy of the survey's results.

The survey provided an opportunity to understand migration to the Island from EU and EEA countries, and the reasons for doing so. This is important information, which helps to inform the Government's position on issues such as citizen's rights, as well as helping us to understand the factors that make Jersey an attractive place to live and work in order to ensure key industries can secure the labour they need in future.

For those residents born in an EU or EEA country, 17% had become resident within the last 5 years and a further 21% between 6 and 10 years ago. 62% had been resident in the Island for over 10 years.

Of all those who had moved to Jersey, the main reason was for work, but those who had moved to Jersey from the EU were much more likely to mention the Island's quality of life and safe and stable environment as motivating factors.

The issuing of passports, and the future of the 'Islander' status stamp, has been a commonly raised issue in our Let's Talk Brexit campaign. The survey has provided some important data in this regard, with 22% of those surveyed saying that they hold a British passport containing the 'Islander' status stamp, and of those born in Jersey, 44% holding a passport with the 'Islander' status. This is a significant figure, highlighting the importance of clarifying the position of those with the Channel Islander 'stamp' in their passports post Brexit.

#### Government of Jersey Response

1. The Government of Jersey wishes to thank all Islanders who have taken the time to complete the Residents' Survey, which has provided a useful representative sample of views on Brexit. The survey is one of many tools that will be used in the development of policy, and importantly allows us to understand the particular concerns of Islanders relevant to their period of residence in Jersey, passport held, employment and residential status.

#### Passports

2. On Brexit, Protocol 3 will fall away and the Channel Islander status will also fall away. Therefore, when those with Channel Islander status (and stamps in their passport) apply for a new British passport, this will not contain the Channel Islander stamp. The distinction between British citizens on the basis of Channel Islander status will therefore also end.

## **Section 2 - Travel, the economy and culture in Jersey**

Brexit may have a noticeable impact on the ability of Islanders to travel within the United Kingdom and the EU. Understanding the level of travel, and the importance placed on it by residents, is crucial for our Brexit planning.

The survey results show that off-Island travel is very important to Islanders; 92% of those sampled having travelled off the Island on at least one trip within the past year.

All segments of Jersey's resident population travelled frequently, but especially those born off-Island and those working in the finance sector. A large proportion of residents also found the Common Travel Area (CTA) agreement and visa-free travel important, most notably for travel to the UK and Ireland, but also for travel further afield.

It is clear that the personal convenience and ease of current travel arrangements, allowing for spontaneity, last minute bookings and not having to experience the time delays associated with immigration controls and visa checks, are of most importance. There was also recognition by many that the CTA agreement worked both ways, allowing for ease of access to Jersey for visitors, which has a positive economic impact on the Island.

The survey highlighted that the ability to work, study or live elsewhere is of significant importance to Islanders, especially to Jersey's younger age groups. Three quarters of respondents rated being able to work, study or live in the UK as important. A smaller, but still significant, proportion of 51% said that it was important to be able to work, study or live in the EU.

Those surveyed also helped enhance our understanding of the importance placed on the EU migrant population's contribution to the Island's economic, social and cultural wellbeing.

Many respondents acknowledged the benefit of employing EU citizens in those sectors where it can be difficult to employ local residents (e.g. tourism, agriculture), and there was also recognition that EU staff often fill skilled roles where Jersey has a staff shortage, such as in the health sector. Some also highlighted the social and cultural benefits of having a multi-cultural mix of nationalities living and working in Jersey.

Some respondents expressed concern about the size of Jersey's population, with resulting strains on the Island's infrastructure; housing, health, education, roads and traffic, social security and welfare. The other main concerns were that those coming to the Island do not integrate properly, take up jobs that could be undertaken by local residents, and drive down wage levels.

There was general agreement across all nationalities that those already resident in Jersey should be allowed to remain and should have their status clarified post Brexit.

The main suggestion for a way forward was to continue to allow EU citizens to live and work in Jersey, but to introduce working visas or permits, particularly shorter term that would limit the period of residency. A points system (similar to Australia) based upon employment required in the Island, skill sets and criminal record checks was also suggested by many respondents.

## Government of Jersey Response

### Travel

**Our priority is to continue with the fundamentals of Jersey's existing relationship with the United Kingdom, particularly in relation to the freedom of movement between the Channel Islands and the UK.**

1. Jersey, along with the UK, Republic of Ireland, Guernsey and the Isle of Man, forms part of the Common Travel Area (CTA), within which British and Irish Nationals can travel freely. Maintaining the CTA and avoiding the imposition of routine immigration controls – particularly between the Island and the UK – is a key priority for the Government of Jersey.
2. We have received a number of assurances from the UK Government regarding its understanding of the importance of preserving Islander's ability to travel freely within the CTA zone. Most recently the UK Government's Position Paper, *Northern Ireland and Ireland*, also made clear that the UK intends to maintain the substance of the CTA.
3. Maintaining and improving transportation links is also vital for Jersey and we are working to ensure that no new barriers to transport are created as a result of the UK's departure from the EU.
4. A meeting to discuss transport issues was held between the UK Government and the Crown Dependencies (including Jersey) on 3rd April 2017. The topic was also considered at the last quarterly meeting between Robin Walker, MP, Parliamentary Under-Secretary of State for Exiting the European Union, and the three Chief Ministers of the Crown Dependencies.
5. Whilst Brexit raises some complex issues, the overarching view of both Jersey and the UK in relation to transport is that there is a broad alignment of interests. We have agreed to maintain a regular dialogue throughout the exit negotiations in order to avoid the imposition of unplanned barriers to transport.

### The economy and culture

**Our priority is to continue, as far as is possible, the substance of our relationship with the EU. This includes securing a deal on movement of persons in the EU for British nationals resident in Jersey. We also want to provide certainty on the position of citizens as early as possible; both for EU citizens resident in the Island and for British citizens – including those from Jersey – resident in the EU.**

6. Jersey is not part of the EU for the purposes of free movement of people. Rather, the Island's relationship with the EU is via Protocol 3, which specifies that Jersey must apply the same treatment to residents of any Member State. Economically, socially and culturally, Jersey benefits greatly from the contribution of the approximately 15,000 non-British EU citizens resident in the Island. From the outset, therefore, the Government of Jersey has been clear about its desire to guarantee the position of EU citizens in Jersey at the earliest possible stage, as well as to preserve the position of Jersey people resident in the EU.

7. When the UK leaves the EU and shapes its own immigration policy for EU citizens, this has the potential to impact upon Jersey, due to the extension of the UK's Immigration Act to the Island. The Government of Jersey has made clear to the UK Government the need for any new restrictions on EU immigration to take into account the particular requirements of the Island's economy, ensuring that Jersey retains access to vital labour markets, and continues to hold, and can enhance where possible, its freedom to determine its immigration requirements.
8. The first immigration meeting with the UK Government took place on 3rd November 2016, a second on 7th February 2017, and the most recent on 20th July 2017. Immigration matters were also considered at the quarterly meeting between Robin Walker MP and the Chief Ministers of the Crown Dependencies, and also during the Minister's visit to the Island on 7th August 2017.
9. The Chief Minister's Department has clearly explained its intention to enhance our migration controls and to reduce migration, while also supporting our economy. We have ensured that the officials developing this policy are fully aware of the concerns raised and suggestions made by the respondents in the Brexit Residents' Survey.

### **Section 3 - Attitudes toward and perceptions of the impact of Brexit**

The Brexit Residents' Survey has allowed us to understand the level of concern Islanders have in relation to the risks posed by Brexit, as well as the opportunities they see for the Island.

Overall, two-thirds of those surveyed were concerned to some extent with regard to the impact of Brexit on Jersey. Those residents born in the EU or EEA were most likely to be concerned (83%), but a majority (61%) of those born in Jersey were also concerned.

15% felt that there had been an increase in the level of xenophobia in Jersey since the Brexit referendum, compared to 2% who felt that it had decreased. Those born in the EU or EEA were most likely to have noticed an increase (27%).

The primary concerns regarding Brexit related in some way to increased costs to Jersey's residents. Secondary concerns related to the impact on Jersey's economy, some of the Island's industries and its workforce.

Apart from the above, in an open-ended question, the main additional concern expressed was that Jersey would either be disregarded by the UK in its negotiations, or used as a bargaining chip.

The greatest opportunity presented by Brexit was the perception that Jersey would have more control over immigration and the size of its population, followed by increased incentives and opportunities to develop new relationships and expand trade with markets outside of the EU (including the UK).

Nearly three-quarters said that the Brexit decision had had no impact on their decision to remain in or leave Jersey. However, the impact of Brexit looks to have affected Jersey's younger generation to a greater extent, with a higher number of those aged under 35 saying that they would be less likely rather than more likely to remain in Jersey.



## Government of Jersey Response

1. The Government has noted with concern the perception by a small number of residents from the EU or EEA that there has been an increase in xenophobia since the Brexit referendum in 2016. We have drawn this matter to the attention of the Minister for Home Affairs. In addition, the States of Jersey Police operate an ongoing campaign to tackle matters that may be regarded as racially motivated hate crime. Further details, and the ability to report instances online, can be found at [http://report-it.org.uk/states\\_of\\_jersey](http://report-it.org.uk/states_of_jersey)
2. Respondents have raised particular concerns in relation to the effects of Brexit on the Island's economy and the impact of importing goods, as well as highlighting opportunities related to expanded trade and developing relationships with emerging economies. These matters - including the Customs Union, World Trade Organisation membership, market development and the Island's ability to exercise continued control of the housing and labour market - are addressed below.

## Trade

**Our priority is to continue the fundamentals of Jersey's existing relationship with the UK. This includes: freedom of trade within a Common Customs Territory; freedom of movement of capital; external trade on the basis of tariffs in common with the UK; and for the terms of any UK/EU Free Trade Agreement to be capable of being extended to Jersey, if we so wish.**

3. Given that the overwhelming majority of goods by volume and value are traded between Jersey and the UK, rather than with EU countries, it is a key Government priority to ensure that free movement of goods with the UK is maintained.
4. We are also keen to ensure that, as the UK seeks to develop its own network of Free Trade Agreements with non-EU jurisdictions once it is no longer an EU Member, Jersey is in a position to participate in such agreements where it is appropriate for us to do so.

## Island Industries

**Our priority is to continue, as far as is possible, the substance of our relationship with the EU. This would include achieving access to EU goods markets (including for agriculture and fisheries products) on terms no less favourable than the UK's; and access to EU markets for financial services through equivalence, mutual recognition or 'third countries' regimes.**

5. Under Protocol 3, Jersey is treated as part of the customs territory of the EU Customs Union (CU). As members of the CU, the Crown Dependencies apply the Common External Tariff and quantitative restriction on importation of goods; they must, therefore apply what the EU has agreed as a member of the World Trade Organization (WTO) with other nations. The Crown Dependencies adopt EU rules governing the Single Market for goods where an obligation to do so arises under Protocol 3.

6. As a consequence, it is the Government of Jersey's priority to plan for the possible introduction of both tariff and non-tariff elements to trade in goods and services with the EU. This includes pursuing the extension of the UK's membership of the WTO to Jersey, whilst also ensuring that the Island is able to participate in any future Free Trade Agreement between the UK and EU.
7. The first meeting with the UK Government on Customs and EU Exit took place in January 2017 where the Crown Dependencies outlined their key priorities. Discussions on these matters continued in the second meeting, which took place on 3rd July 2017. Subsequently, officials from the Department for International Trade visited the Island on 24th August 2017 to discuss international trade commitments once the UK leaves the EU. In the same week, officials from the UK Department for the Environment, Food & Rural Affairs visited the Jersey to discuss Agriculture and Fisheries matters with colleagues at the Department of the Environment.
8. The Brexit Business Survey, which ran from 13th June to 28th July 2017, was designed to give Jersey businesses the opportunity to share their views on Brexit and the potential impact that it might have on the Island's industries. The results from this survey are being collated at the time of publication of this report, and will be published in a separate paper in Autumn 2017.

### **Global Opportunities**

**Our priority is to ensure that Jersey has the right agreements and international relationships in place to benefit from global opportunities arising from Brexit. This includes securing extension of WTO territorial application to Jersey. We also want to broaden and deepen Jersey's commercial and political relationships with non-EU global markets, with particular emphasis on market expansion in high-growth economies in Africa, Asia and the Middle East.**

9. The Government of Jersey is in ongoing discussions with the Department for International Trade and the Ministry of Justice on the specific matter of WTO extension.
10. In addition to our very close connections to the UK and Europe, Jersey has for many years attracted business from around the world. Given the uncertainty over the economic impact of Brexit on the economies of both the UK and the EU, the work to build and strengthen our links to non-EU markets has taken on increased importance.
11. A new team has been established within the Ministry of External Relations, tasked specifically with strengthening our links with priority global markets. This team will work to ensure that Jersey has strong and mutually beneficial relationships with priority partners based on the full range of commercial, political, cultural, and educational co-operation.

### **Ensuring our particular needs are understood**

**Our priority is to ensure that Jersey will still control access to its housing and labour markets, while protecting the position of non-British EU citizens who currently live and work in Jersey. One way we aim to achieve this is by working closely with the governments of Guernsey and the Isle of Man to maximise influence on the UK's Brexit negotiation.**

12. In particular Jersey's agricultural and hospitality sectors greatly benefit from permanent or seasonal workers from EU Member States. It is therefore important for the sector that access to labour markets beyond the Island is maintained in some form post-Brexit.
13. Joint 'work-streams' between the UK and the Crown Dependencies have been established in key priority areas. This engagement has been overseen and assessed at a political level by the Minister for External Relations, the Brexit Ministerial Group, and at quarterly meetings between the Chief Ministers of the Crown Dependencies and Robin Walker, MP.
14. At the same time, the Government of Jersey have sought to build awareness more widely in Westminster through an ongoing programme of engagement with UK Parliamentarians, and in submissions to the Justice Committee, the Foreign Affairs Committee and the Lords E.U. Select Committee. Through these efforts, we have ensured that the UK Government has a deep and thorough understanding of our interests; we have secured commitments at the highest level that these interests will be fully represented, and we have developed a level of awareness amongst UK Parliamentarians enabling them to hold Government to account. We welcome the fact that these commitments have been restated in the Brexit position papers published by the UK Government starting in August.

## **Section 4 - Understanding of Brexit and requirements for additional information**

We want to ensure that all Islanders are provided with up to date and easily accessible information on Brexit as the negotiations progress. Overall, a high proportion (87%) of Islanders we surveyed felt that they already had a sufficient understanding of the issues associated with Brexit, but just under half said that they would still like to receive further information; most notably the younger age groups.

The main information requested is regular updates on the progress of negotiations, the decisions reached and the impact and implications for Jersey. We recognise that Islanders want the information disseminated to be factual, without bias and containing no 'spin'. There was also interest in the arrangements and interaction between the UK and Jersey governments during the process, as well as being informed of Jersey's negotiating strategy, its decisions and the strategies to deal with outcomes.

The most preferred communication channel was online, although a wide variety of channels were suggested. Receiving updates by email was most frequently mentioned, with information being held on a website such as gov.je.

### **Government of Jersey Response**

#### **Stakeholder Engagement**

**Our priority is to ensure effective engagement with the UK government throughout the withdrawal process, as well as consistent local engagement with the whole of the Government of Jersey, States Members, Jersey residents and businesses.**

1. The 'Let's Talk Brexit' stakeholder engagement campaign was launched on 8th March 2017, to allow the public and businesses to share thoughts and concerns about Brexit with the government and one another in a structured and accessible way.
2. The campaign aims to ensure that accurate information is made available to the Public on Jersey's constitutional position, on the process for the UK's exit from the EU, and on the work that Jersey is undertaking both in Jersey and with the UK Government. From the outset, it was considered particularly important to communicate using formats, language and tone suited to different stakeholder groups with diverse interests in Brexit, ranging from EU citizens resident in Jersey, to Jersey residents concerned about (for example) travel in Europe, to international businesses operating in Jersey, and to local businesses.
3. The Government of Jersey will continue to develop the Let's Talk Brexit campaign, and publish in accessible formats the outcome of public engagement, surveys, focus groups and online discussions. In line with the suggestions made in this survey, an electronic and paper-based newsletter will also be developed to more regularly inform members of the public on Brexit developments.

## **Results**

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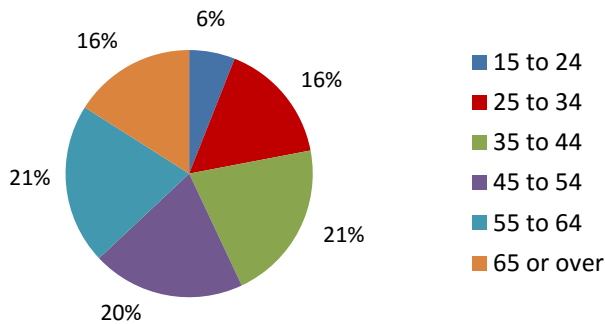
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## Section 1 – Resident profile and reasons to move to the Island

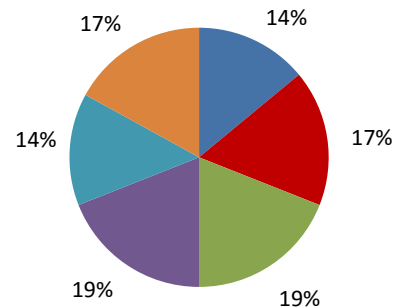
The first section of the questionnaire examined the profile of respondents to check that the results would be broadly representative of Jersey’s adult resident population and also to allow for the results later in the survey to be cross-tabulated by differing resident sub-samples.

### Age distribution of respondents



**Sample size: 823**

### Jersey’s adult population

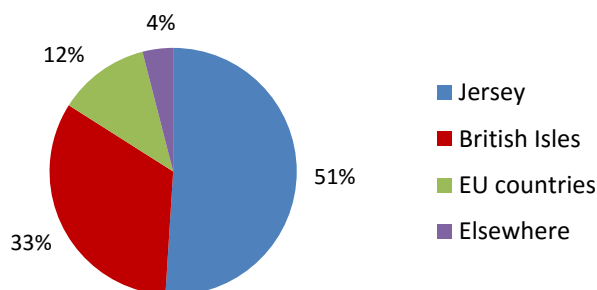


The above shows that the sample of respondents, compared to Jersey’s adult population, has an over-representation of those aged 55 to 64 and a corresponding under-representation of those aged 15 to 24. The other age groupings are broadly similar to Jersey’s adult population

A factor that may have caused this is the head of the household completing the questionnaire rather than passing it on to younger members of the family still living with parents. The subject matter of the questionnaire may also have held more relevance and interest to an older audience.

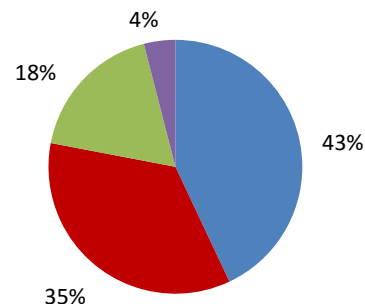
Within the body of this report, the 15 to 24 and 25 to 34 age groups have been combined for sub-sample analysis due to the small sample size of respondents in the 15 to 24 age range.

### Where respondents were born



**Sample size: 846**

### Jersey’s adult population (aged 15 or over)



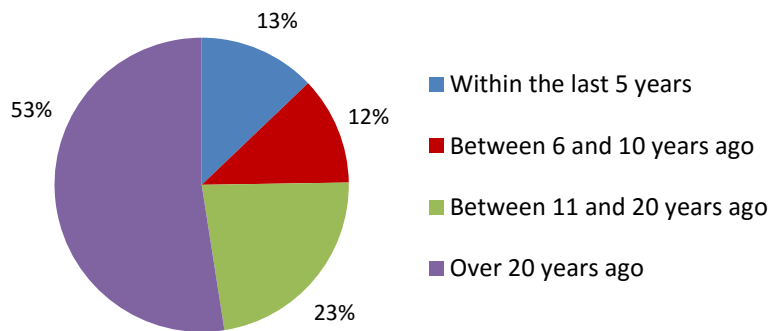
The above shows that the sample has some bias toward those born in Jersey, and a corresponding under-representation of respondents born in EU countries; mainly due to a low response rate from those born in Portugal/Madeira.

The full breakdown of the sample by place of birth was as follows:

<u>Place of birth</u>	<u>Total respondents</u>	<u>% of sample</u>
Jersey	429	51%
Other CI	6	1%
Isle of Man	2	*
Elsewhere in British Isles	273	32%
Republic of Ireland	12	1%
Portugal/Madeira	24	3%
Poland	23	3%
Romania	15	2%
France	13	2%
Other EU	13	2%
Elsewhere	36	4%

For the purposes of sub-sample analysis within this report, the above have been grouped into 'Jersey', 'UK', 'Other EU' and 'Other Worldwide'.

### Period or residence in Jersey



**Sample size: 436**

Just over half of the sample was born in Jersey and, for those who had moved to Jersey, a further 53% had been continuously resident in the Island for more than 20 years.

24% of respondents had moved to Jersey within the past 10 years. In the last Census, 37% of those who had moved to Jersey had done so within the 10 years leading up to 2011. This perhaps indicates a higher response rate from those who has been resident in Jersey for a longer period.

While the sample may not be completely representative of the resident population, for the purposes of Brexit, it may be useful to consider the current period of residence for differing nationalities:

Place of birth	Sample size	Resident last 5 years	Resident last 10 years	Resident last 20 years	Resident for over 20 years
UK	<b>268</b>	10%	7%	20%	63%
Other EU	<b>102</b>	17%	21%	31%	31%
Elsewhere	<b>34</b>	24%	18%	18%	41%

Breaking the EU figures down further, 29% of Portuguese/Madeiran respondents had been resident in the Island for less than 10 years, 39% of Polish and 80% of Romanian (Based upon small sample sizes).

### **Reasons to move to Jersey**

Those who had not been born in Jersey were given a list of options and asked what the main reason was for their decision to move to the Island. These are listed in order below:

	All respondents	UK	Other EU	Elsewhere
<b>Sample size</b>	<b>415</b>	<b>272</b>	<b>101</b>	<b>34</b>
I moved here for work	<b>34%</b>	36%	28%	41%
A family member or partner moved here to work	<b>22%</b>	21%	21%	26%
Personal reasons (e.g. a relationship or caring for a relative)	<b>13%</b>	15%	10%	9%
A parent or parents are from Jersey but I was born off-Island	<b>12%</b>	13%	4%	24%
For a better quality of life	<b>11%</b>	10%	19%	0%
The safe and stable environment in Jersey	<b>4%</b>	1%	10%	0%
For financial reasons	<b>1%</b>	1%	3%	0%
The quality of services in Jersey (e.g. health care, education etc.)	<b>*</b>	*	1%	0%
Some other reason	<b>3%</b>	2%	5%	0%

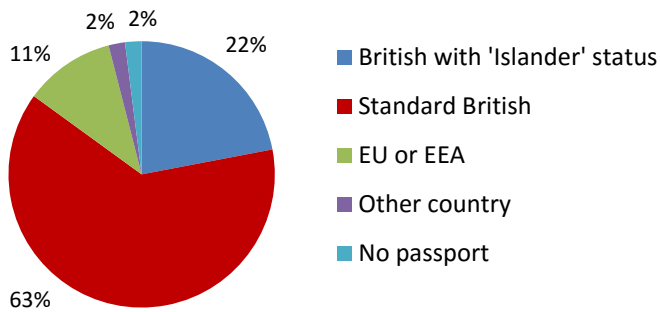
The 'other' reasons were varied, with the main one being that they came to visit the Island and just ended up staying. Two respondents said that they had inherited property in Jersey.

It should be noted that the reasons to become resident in Jersey are in reality probably a combination of the above, as well as other reasons not listed, but the survey question asked for one response only representing the single, main reason.

It is clear from the above that no matter the nationality, the main reason to move to Jersey is for work. However, it is interesting to note the much higher percentages for EU nationalities for Jersey's quality of life and its safe and stable environment.



## Type of passport held



**Sample size: 862**

The chart shows the breakdown of the total number of passports held by the respondents, as a small proportion of the sample (2%) held two passports.

For those born in Jersey, 1% said they did not have a passport and 1% said they had 2 passports. 12% of those from countries outside of the EU said that they held 2 passports.

**N.b. 'Islander' status means that there is a stamp in the passport which states that the holder does not have the automatic right to live or work in Europe. These are issued to those born in Jersey who do not have a UK parent or grandparent, or who have not resided in the UK for at least 5 years.**

The following shows the breakdown of the type of passport held by place of birth:

Place of birth	Sample size	British passport with 'Islander' status	Standard British passport	EU or EEA passport	Other passport	Do not hold a current passport
Jersey	<b>435</b>	44%	53%	1%	1%	1%
UK	<b>277</b>	0%	97%	1%	1%	1%
Other EU	<b>104</b>	0%	12%	82%	2%	4%
Elsewhere	<b>38</b>	0%	63%	5%	29%	3%

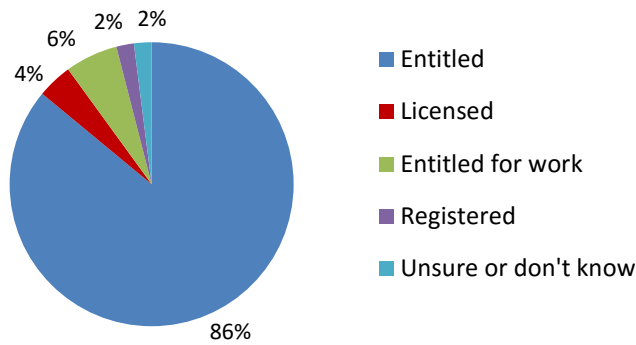
**N.b. It is possible that those who stated that they do not currently hold a passport may be in the process of application.**

Of the total British passports held by those resident in Jersey, 26% had the 'Islander' status stamped within. This is very similar to figures provided by the UK's passport office which show that 23% of current Jersey/British passports have the stamp. The higher proportion from the survey can be attributed to a higher proportion of Jersey-born residents completing the survey than Jersey's adult population profile.

It is also interesting to note that a high proportion of those born elsewhere in the world, outside of the EU, but residing in Jersey held a standard British passport, whereas 82% of those born in an EU or EEA country outside of the UK held an EU or EEA passport.

44% of those born in Jersey had the 'Islander' status stamp within their passport, and just over half had a standard British passport.

## Residential and work status



Sample size: 785

The nearest comparative population data comes from the 2016 Labour Market report which showed the following.

Entitled/entitled to work:	88%
Licensed:	3%
Registered:	9%

This would imply that the survey sample under-represents those who are 'registered'.

N.b. The new definitions above came into place with the Control of Housing and Work Law in 2012. Many longer-term residents who have not changed employment since then will not have applied yet for the new registration cards.

Please note the following definitions:

**Entitled** – Can buy or rent any property in Jersey and do not need permission to be employed

**Licensed** – Some restrictions on buying/renting property and employer needs permission to employ you

**Entitled for work** – Can rent 'registered' property and can work anywhere without need for permission

**Registered** – Can rent 'registered' property only and employer needs permission to employ you

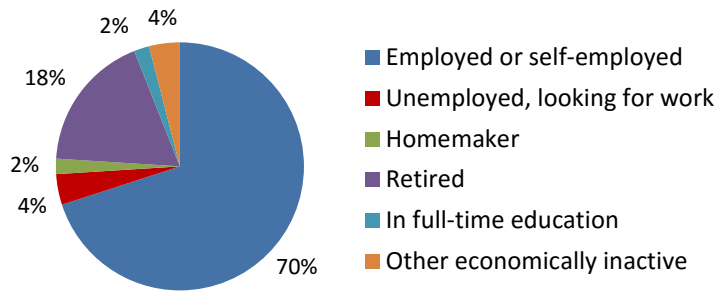
The following shows the breakdown of residential and work status by place of birth from the survey:

Place of birth	Sample size	Entitled	Licensed	Entitled for work	Registered	Unsure or don't know
Jersey	379	99%	0%	1%	0%	1%
UK	265	81%	7%	7%	3%	3%
Other EU	102	59%	6%	22%	10%	4%
Elsewhere	34	65%	18%	12%	6%	0%

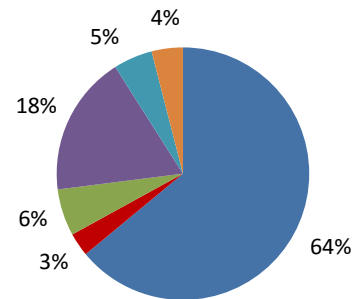
The majority of respondents from all places of birth said that they held the 'entitled' status, although this was much lower for those born in an EU country. Although based on relatively small sample sizes, around two-thirds of Polish and Portuguese/Madeiran respondents held the 'entitled' status, as opposed to just 7% of the Romanian respondents. This is likely to be due to the relatively recent arrival of Romanian workers into the Jersey workforce.

An important aspect to understand in planning Jersey’s future, as well as obviously the impact of Brexit, is the employment status of the resident population.

**Employment status**



**Jersey’s adult population**



**Sample size: 846**

70% of the sample was either employed or self-employed, compared to 64% of Jersey’s adult population when the census was taken in 2011. The sample has some bias toward those in employment, and an under-representation of homemakers and those in full-time education, but the economic activity status profile of Jersey’s adult population is likely to have changed since 2011.

The following shows the breakdown of employment status by place of birth from the survey:

Place of birth	Sample size	Employed or self-employed	Looking for work	Retired	Full time education	Other economically inactive
Jersey	<b>429</b>	67%	6%	18%	3%	6%
UK	<b>273</b>	70%	1%	22%	1%	5%
Other EU	<b>102</b>	76%	3%	10%	2%	6%
Elsewhere	<b>34</b>	68%	3%	24%	3%	3%

**N.b. ‘Other economically inactive’ in the table above includes ‘homemakers’ which are shown separately in the charts above.**

The above shows that those coming to Jersey from EU countries are most likely to be economically active and least likely to be in retirement, which has implications both on the income and expenditure side of the States finances. Although based on small sample sizes, 91% of Polish and 100% of Romanian respondents were in employment. This finding was also backed up by the 2011 Census which showed that the highest economic activity rate was for people born in Poland.

It is also useful to understand the economic activity status of the differing residential qualifications. 66% of those ‘entitled’ were in employment, compared with 97% of those ‘licensed’, 89% of those ‘entitled to work’ and 95% of those ‘registered’.

## **Industry employed in**

The following shows the breakdown by industry sector for those in employment:

<b>Industry sector</b>	<b>Total respondents</b>	<b>% of total sample</b>
<b><u>Non-finance sectors</u></b>		
Agriculture	11	1.9%
Fishing	10	1.7%
Construction and tradesmen	48	8.3%
Wholesale and retail	46	7.9%
Hotels, restaurants and bars	24	4.1%
Education	48	8.3%
Health	40	6.9%
Public sector (excluding education and health)	81	14.0%
Transport and storage (including Ports and Jersey Post)	28	4.8%
Information and communication services (IT, telecoms & marketing)	49	8.4%
Other	49	8.4%
<b>Sub-total</b>	<b>434</b>	<b>75%</b>
<b><u>Finance sectors</u></b>		
Banking	47	8.1%
Trust and company administration	32	5.5%
Fund administration and management	20	3.4%
Investment advisory	10	1.7%
Legal services	22	3.8%
Accountancy	14	2.4%
Insurance	1	0.2%
<b>Sub-total</b>	<b>146</b>	<b>25%</b>
<b>Total Sample</b>	<b>580</b>	

The industry sector categories used in the survey are not exactly the same as those used in the standard reports issued by the States Statistics Unit but the above shows a broad range of industry sector employees are represented within the survey findings. The most recent Labour Market report from December 2016 showed that 26% of employment in Jersey was in the public sector, health and education which is fairly similar to the combined sample total within these areas of 29%. The same report shows that 22% of Jersey's employees worked in the finance sector, which again is not too dissimilar from the 25% of the survey sample. The main sectors under-represented within the survey sample are employees from wholesale and retail, as well as hotels, restaurants and bars. This ties in with a lower representation in the survey from those with 'registered' status.

## **Overall Sample**

Due to the differences highlighted within this section, it cannot be claimed that the sample of respondents is completely representative of the adult population of Jersey. The main biases to bear in mind when interpreting the results are that the sample profile is not sufficiently representative of Jersey's younger population aged under 24, and also under-represents Jersey's resident Portuguese/Madeiran community. The sample also under-represents those with 'registered' status who are typically employed within the retail and hospitality sectors.

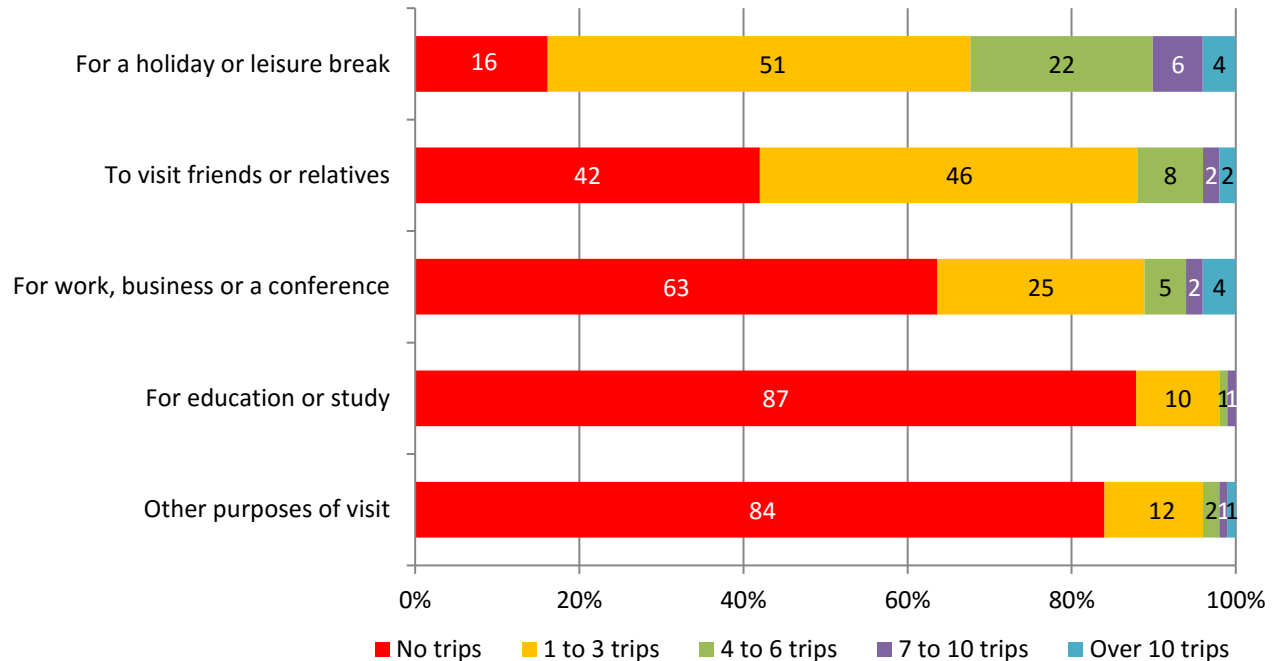
These biases may have been caused to some extent by the method of promotion and distribution, but are also likely to have been caused by the subject matter being of more interest and relevance to particular elements of Jersey's resident population.

Nevertheless, the biases are not very large for a self-completion survey of this nature and the overall results are reflective of a broad range of views from Jersey's resident population as a whole.

## Section 2 – Travel, the economy and culture in Jersey

### Travel off the Island

#### 2.1 How many times have you travelled off the Island within the last year for the following?



**Sample size: 734**

In total, **92%** of the respondents had travelled off the Island on at least one trip for any of the above purposes of visit within the past year. 89% of those born in Jersey had travelled off-Island in the last year compared to 96% of those not born on the Island.

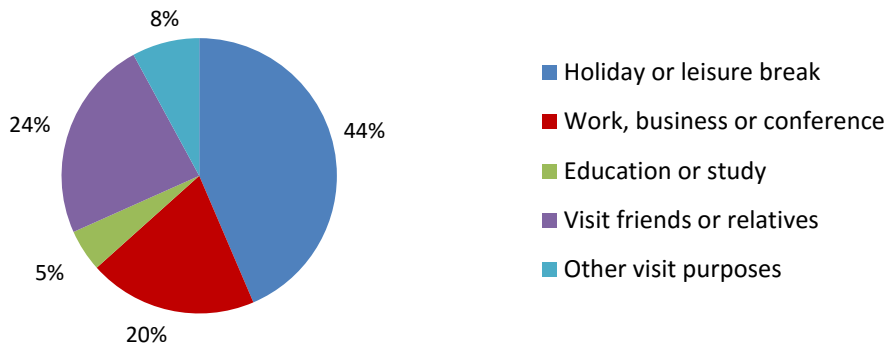
88% of those with the 'Islander' status in their British passport had travelled off-Island compared to 94% of those with a standard British passport.

Applying a mid-value to the categories used in the survey and using a value of 12 for those who claimed over 10 trips, this shows a **total average number of annual trips off-Island per respondent of 7.1**. This also includes the 8% who did not travel at all. While this is likely to be an over-estimate when compared with information from previous passenger exit surveys conducted by the Tourism department, it does emphasise the importance to Jersey residents of travel links to the Island.

The average number of trips for each purpose of visit were as follows:

Holiday or leisure break:	3.1
Visiting friends and relatives:	1.7
Business, work or conference:	1.4
Education or study:	0.4
Other purposes of visit:	0.5

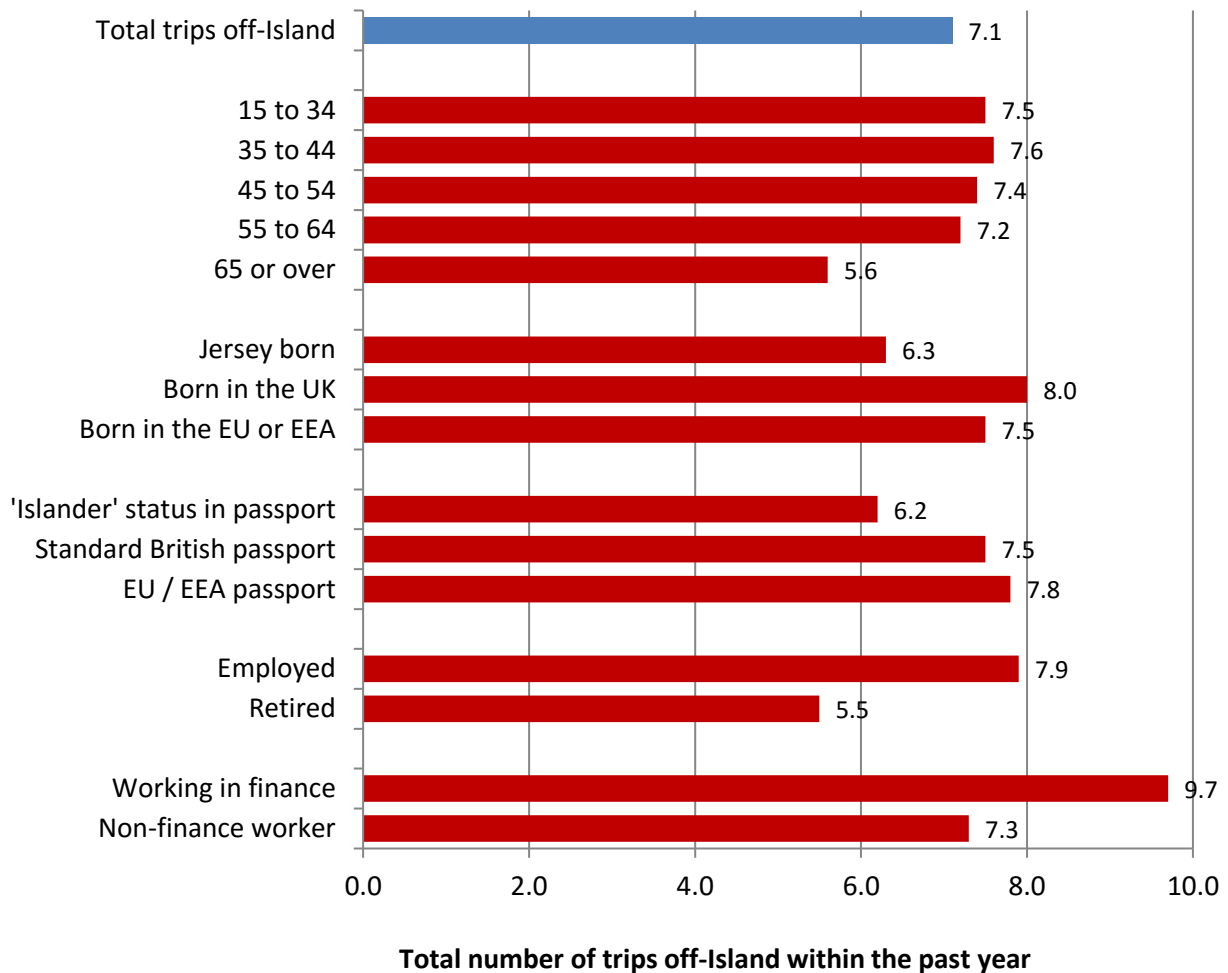
Taking into account the average number of trips for each purpose of visit, the breakdown of total resident trips off-Island over the past year by purpose of visit was as follows:



**Sample size: 734**

The graph below uses the same methodology for calculating averages across differing segments of the survey sample. This should be used for comparative purposes to visually demonstrate the relative importance of travel off-Island to different segments of Jersey's adult population.

### Average number of total annual trips off-Island



**N.b. The average numbers above should be used with caution as they have assumed mid-values for the categories used in the survey.**

The above shows a significant level of travel across all segments of Jersey’s resident population. The only group to stand out above as being less active in the travel market were those retired and aged 65 or over, but their average number of trips was still greater than 5.

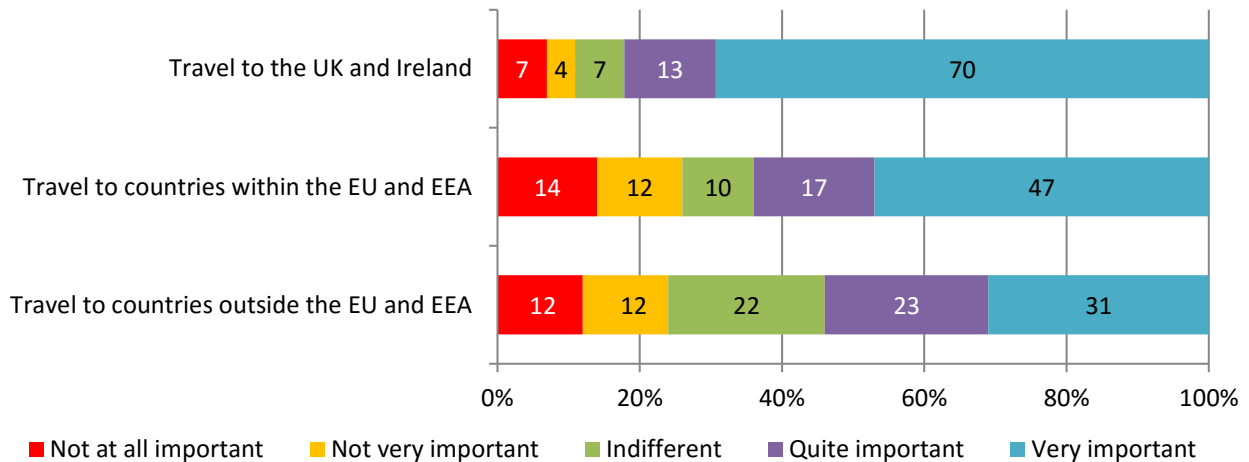
Those born in Jersey were slightly less likely to travel off-Island than those who have moved to Jersey, whether from the UK or from other countries. These residents were much more likely to travel off-Island to visit their friends and relatives, and at the same time are more likely to receive visits in Jersey from friends and relatives, thus sustaining some travel links that would not potentially operate on the Jersey route without their support.

For those respondents who were currently in employment, the average number of **business trips** made off-Island over the past years was 1.9, with those in the finance sector taking an average of 2.5 business trips and those in non-finance jobs taking an average of 1.7 business trips.

### **CTA agreement and visa-free travel**

This question was introduced by an explanation as to what the Common Travel Area (CTA) is and its implications in terms of visa-free travel and immigration control across the EU and EEA.

#### **2.2 Please rate the importance to you of the CTA agreement and visa-free travel to the following:**



**Sample size: 731**

**N.b. Those responding as ‘Don’t know / No opinion’ have been excluded from the above.**

Clearly, the majority of Jersey residents find the CTA agreement and visa-free travel important, most notably for travel to the UK and Ireland. However, around 1 in 4 respondents considered visa-free travel to countries outside of the UK and Ireland as ‘unimportant’.

All age groups considered visa-free travel to the **UK and Ireland** to be important, although the level of importance diminished with age. Travel to these destinations was also important to all nationalities, and only slightly less so to those born in the EU.



Visa-free travel to countries within the **EU and EEA** was also considered to be important to all age groups, but less so to Jersey's younger generation aged under 35. Naturally, visa-free travel to these destinations was of particular importance to residents born in the EU/EEA and less so to those born in Jersey. Visa-free travel to the EU and EEA was also more important to those working in the finance sector.

Visa-free travel to countries outside of the EU and EEA was again obviously more important to those living in Jersey who had originated from those countries.

A follow up open-ended question asked the following:

**2.3 If you have answered above that you feel that the CTA agreement or visa-free travel are important to you, please could you expand upon this explaining the main reasons why?**

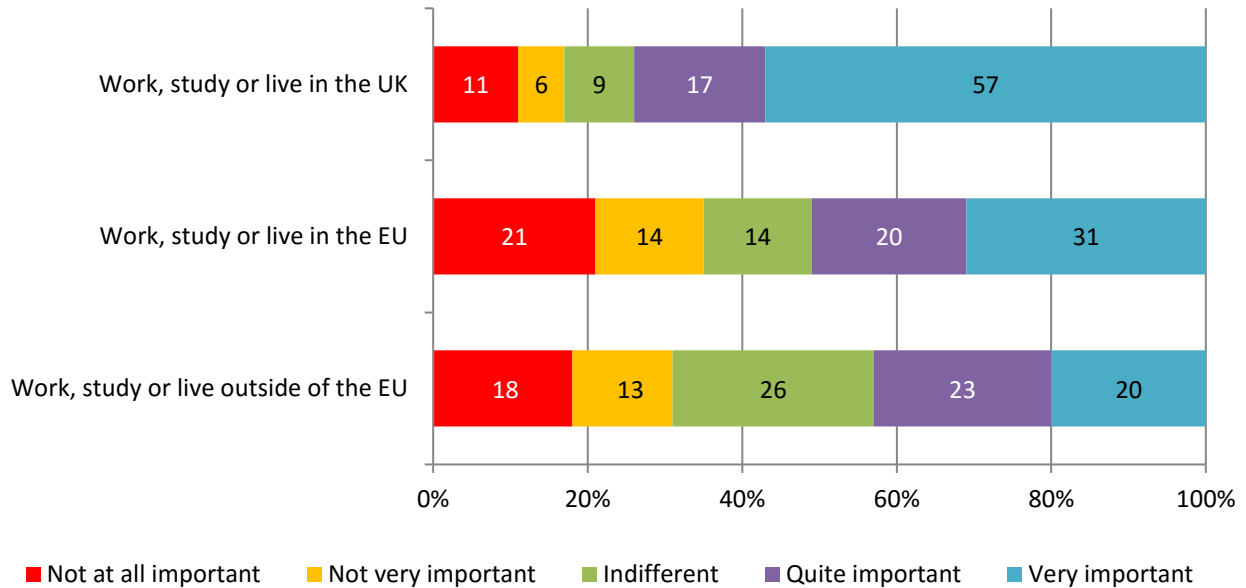
The vast majority of comments referred to the personal convenience and ease of current travel arrangements allowing for spontaneity, last minute bookings and not having to experience the time delays associated with immigration controls and visa checks. Many respondents also mentioned the additional cost, time and difficulty involved in having to apply for travel visas. Those who were born in the EU were more likely to mention the importance of being able to visit friends and family in their home country without the difficulty and cost associated with visas.

Apart from the personal impact, some respondents also mentioned the importance of visa-free travel for those coming into the Island. The main concern was with regard to the economic impact on Jersey; notably to the tourism industry, but also impacting on other sectors through fewer business trips to the Island. To a lesser extent, concerns were expressed about the social and cultural impact on the Island if Jersey was to become more insular and less part of the international community through reduced travel by both the resident population and those visiting.

Although not directly related to the question, there were also some comments suggesting that there should be more controls and checks in place on travel for foreign visitors coming into Jersey; particularly in relation to detecting either potential terrorists or some other unlawful activity.

## Working, studying or living off-Island

### 2.4 Please rate the importance to you of being able to potentially work, study or live in the following locations:



Sample size: 729

N.b. Those responding as 'Don't know / No opinion' have been excluded from the above.

Three-quarters of the sample rated being able to work, study or live in the UK as important with most of these giving a rating of 'very important'. Just over half of the respondents rated the ability to work, study or live within other EU countries as important and 43% rated the ability to work, study or live in countries outside of the EU as important. For all of the above locations, a majority gave a higher rating for 'important' rather than 'unimportant'.

The ability to work, study or live abroad, no matter the location, was generally of more importance to Jersey's younger age groups, with the level of importance diminishing for those aged 55 or over.

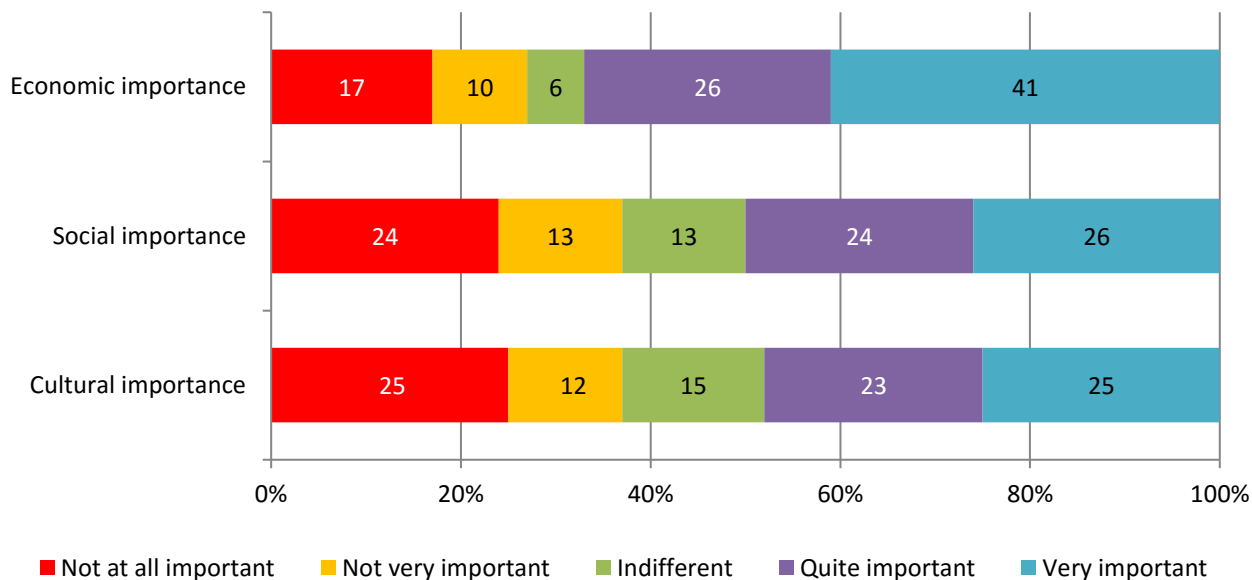
Those born in the EU (69%) were only slightly less likely than those born in Jersey (74%) or the UK (77%) to consider work, study or residence in the UK to be important.

A fairly similar number of those born in Jersey felt that work, study or residence in the EU was important to them (45%) as those feeling it was unimportant (43%).

Those working in the finance sector (66%) were more likely to consider work, study or residence in the EU to be important than those working outside of the finance sector (54%). There was little difference in response, however, when asked about countries outside of the EU.

## Economic, social and cultural importance of the CTA to Jersey

2.5 At the moment, as the UK is a member of the European Union and Jersey is in the Common Travel Area with the UK, EU nationals are able to move to Jersey to live and work here, subject to Jersey's own system of housing and employment licensing. Please rate how important you feel this is to Jersey for the following:



Sample size: 730

N.b. Those responding as 'Don't know / No opinion' have been excluded from the above.

For all of the above, a majority of residents felt that it was important for EU nationals to be able to move to Jersey to live and work, subject to Jersey's own system of housing and employment licensing. Two-thirds of respondents felt that the ability of EU nationals to live and work in Jersey was of economic importance to Jersey, while half felt that there was a social and cultural importance to the Island.

With regard to the perceived **economic** importance of EU nationals being able to move to Jersey to live and work, Jersey's younger age groups of 15 to 34 were relatively less likely to consider this as important (62%), as well as those born in Jersey (58%). Those born in the UK (75%) or the EU (89%) were most likely to consider the ability for EU nationals to move to Jersey to be important to Jersey's economy.

With regard to the perceived **social and cultural** importance of EU nationals being able to move to the Island to live and work, Jersey's older age groups were less likely to consider these as important to Jersey, as well as those born in Jersey.

**2.6 What other aspects of Island life do you feel are impacted upon by this current right of EU nationals to live and work in Jersey, subject to Jersey's own system of housing and employment licensing, and please state whether you think this is positive or negative for the Island?**

For this open-ended question, negative comments about the impact on Jersey outnumbered positive by a ratio of approximately 2 to 1. Comments from those born in Jersey were most likely to be negative but there were similar responses also submitted by those born in the UK. By far the most common negative comments related to Jersey being over-populated, with resulting strains on the Island's infrastructure.

On the other hand, those living in Jersey but born in the EU or further afield felt that they contributed in a positive way to Island life and its economy and fulfilled important roles. There was also general agreement from these respondents that Jersey's unique position of having the ability to control immigration is positive and important for the Island.

The main, categorised **positive comments** put forward in order of prevalence were as follows:

- 1) It is economically beneficial for EU nationals to take employment in Jersey, particularly in certain sectors where it is difficult to employ locals (e.g. tourism, agriculture, retail). This was often accompanied by comments that a work permit system should be introduced.
- 2) It is good to have a multi-cultural society in Jersey for cultural diversity, social wellbeing, to broaden outlooks and enrich the Island.
- 3) Apart from the lower-paid jobs in Jersey, EU staff often fill skilled roles where Jersey has staff shortages – health service staff were most frequently mentioned in this regard.

The main, categorised **negative comments** put forward in order of prevalence were as follows:

- 1) Jersey is over-populated already due to too much immigration from the EU which has placed a negative strain on the Island's infrastructure; housing, health, the education system, roads and traffic, the social security and welfare system.
- 2) Those who have come to Jersey often don't speak English, create their own enclaves and communities within the Island and don't effectively integrate.
- 3) Jersey companies exploit the cheap labour provided by EU workers which, in turn, lowers wages within the economy as a whole.
- 4) Jobs are taken up which could be done by appropriately qualified and trained locals.
- 5) Jersey feels less safe now; crime levels are perceived to have increased with the influx of foreign workers.
- 6) Low paid immigrants do not contribute much to Jersey's economy through their taxation.
- 7) Loss of Jersey's cultural identity and heritage.
- 8) Criminals and illegal immigrants have been allowed to enter Jersey with no or inadequate checks.
- 9) There were also negative comments about so many people moving to Jersey from the UK, not just the EU.

## **2.7 Looking forward, do you have any thoughts or suggestions as to the direction Jersey might follow with regard to the rights of EU nationals to live and work in the Island?**

The final open-ended question in this section had many responses and suggestions, but there was general agreement across all nationalities that those already resident in the Island should be allowed to remain and should have their status clarified. The top two suggestions below were to introduce work permits and to retain the current system, but those suggesting more limiting work permits outnumbered those wishing to retain the current rights of EU nationals by over 2 to 1.

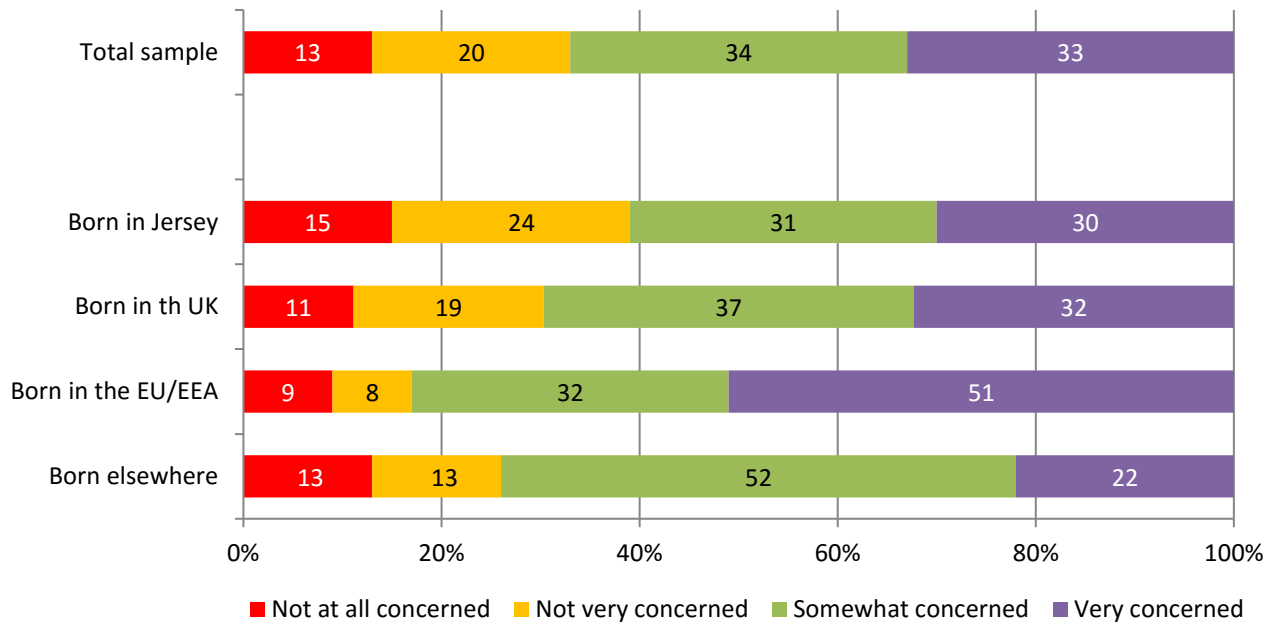
Those resident in Jersey but born in the EU obviously favoured their continued rights to live and work in the Island, but a large number also agreed that there should be more controls and checks in place.

The main, categorised comments and suggestions put forward in order of prevalence were as follows:

- 1) Introduce work visas/permits; particularly shorter term permits that limit the period of residency.
- 2) Preserve the current system/rights of EU nationals which allows for the free movement of goods and people.
- 3) Introduce a point system (Australia often mentioned) based upon employment requirement, skill sets and no criminal record etc.
- 4) Introduce tighter entry rules, controls and checks.
- 5) Allow EU nationals already resident in Jersey to remain, with their rights maintained.
- 6) Introduce stricter controls and restrictions relating to access to benefits once residing in Jersey; a longer period of residence before qualifying.
- 7) Need reciprocal arrangements with individual countries, allowing those with the 'Islander' status to live and work there.
- 8) Those coming to the Island should have guaranteed employment before arrival.
- 9) Repatriate any EU nationals who have a criminal record or commit a crime in Jersey.

## Section 3 – Attitudes toward and perceptions of the impact of Brexit

### 3.1 How concerned are you with regard to the potential impact of Brexit on Jersey?

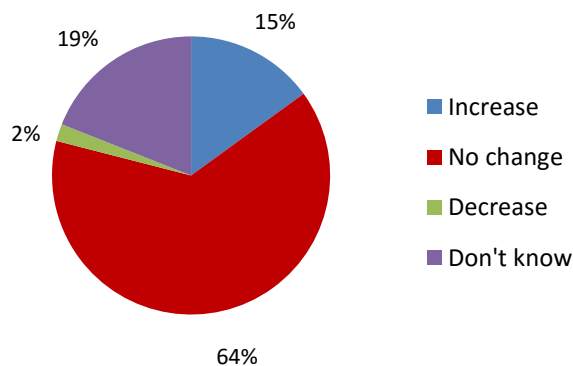


Total sample size: 651

N.b. Those responding as 'Don't know / No opinion' have been excluded from the above.

Overall, two-thirds of the respondents were concerned to some extent with regard to the impact of Brexit on Jersey, with little difference in response to this question by age group, employment status and whether they were employed within the finance sector or not. There was, however, a difference in response by nationality as shown above, with those residents born in the EU or EEA having greater concerns.

### 3.2 In your personal experience, has there been any change in the level of xenophobia in Jersey (e.g. racially motivated hate, crime or comments) since the Brexit referendum last year?



Sample size: 660

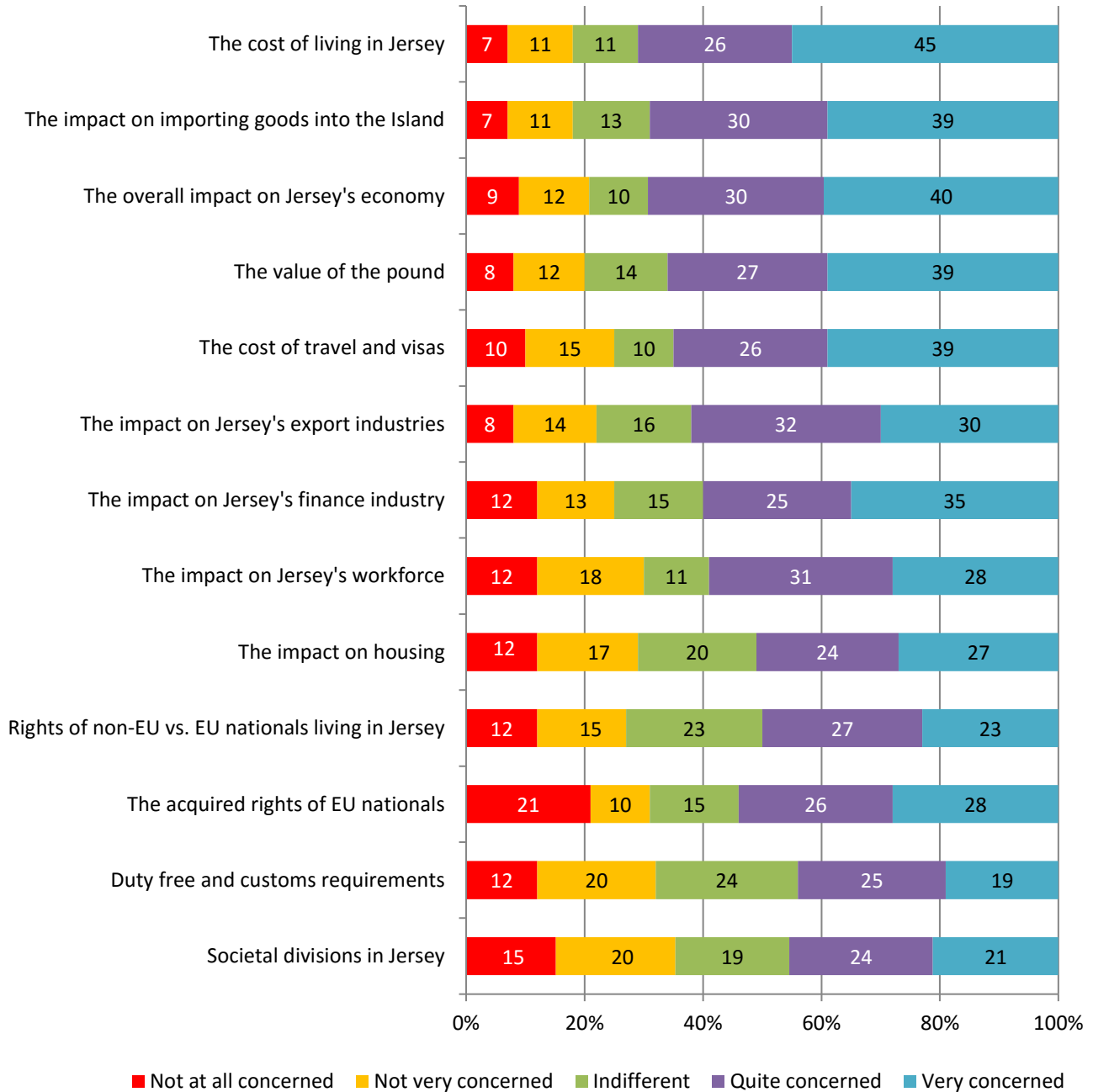
Overall, 15% of the sample felt that there had been an increase in xenophobia in Jersey, with those most likely to feel there had been an increase shown below:

Aged 35 to 44:	23%
Born in the EU or EEA:	27%
Working in Finance:	20%

More elderly respondents and those born in Jersey were least likely to feel that there had been an increase in xenophobia, but were still more likely to feel there had been an increase rather than a decrease.

### 3.3 How concerned would you be about the following with regard to the potential negative impacts on Jersey following Brexit?

The graph below shows the potential negative impacts in order of concern:



**Sample size: 629 to 651**

For all of the above, there was a higher proportion of respondents who expressed a concern rather than no concern, and for all apart from the bottom 2, over half of the respondents said that they were either 'quite' or 'very' concerned. The primary concerns shown above mainly relate in some way to potentially higher costs to residents following Brexit. At the next level, the concerns related to the impact on Jersey's

economy, its specific industries and its workforce. Of lesser concern were the potential impacts on EU nationals living in Jersey, their acquired rights and societal divisions.

### **3.4 What other concerns do you have with regard to the potentially negative implications of Brexit on Jersey?**

Many of the concerns expressed in response to this subsequent open-ended question reiterated concerns put forward in the previous pre-coded question, particularly relating to the impact on Jersey's finance industry, the economy overall and the cost of living.

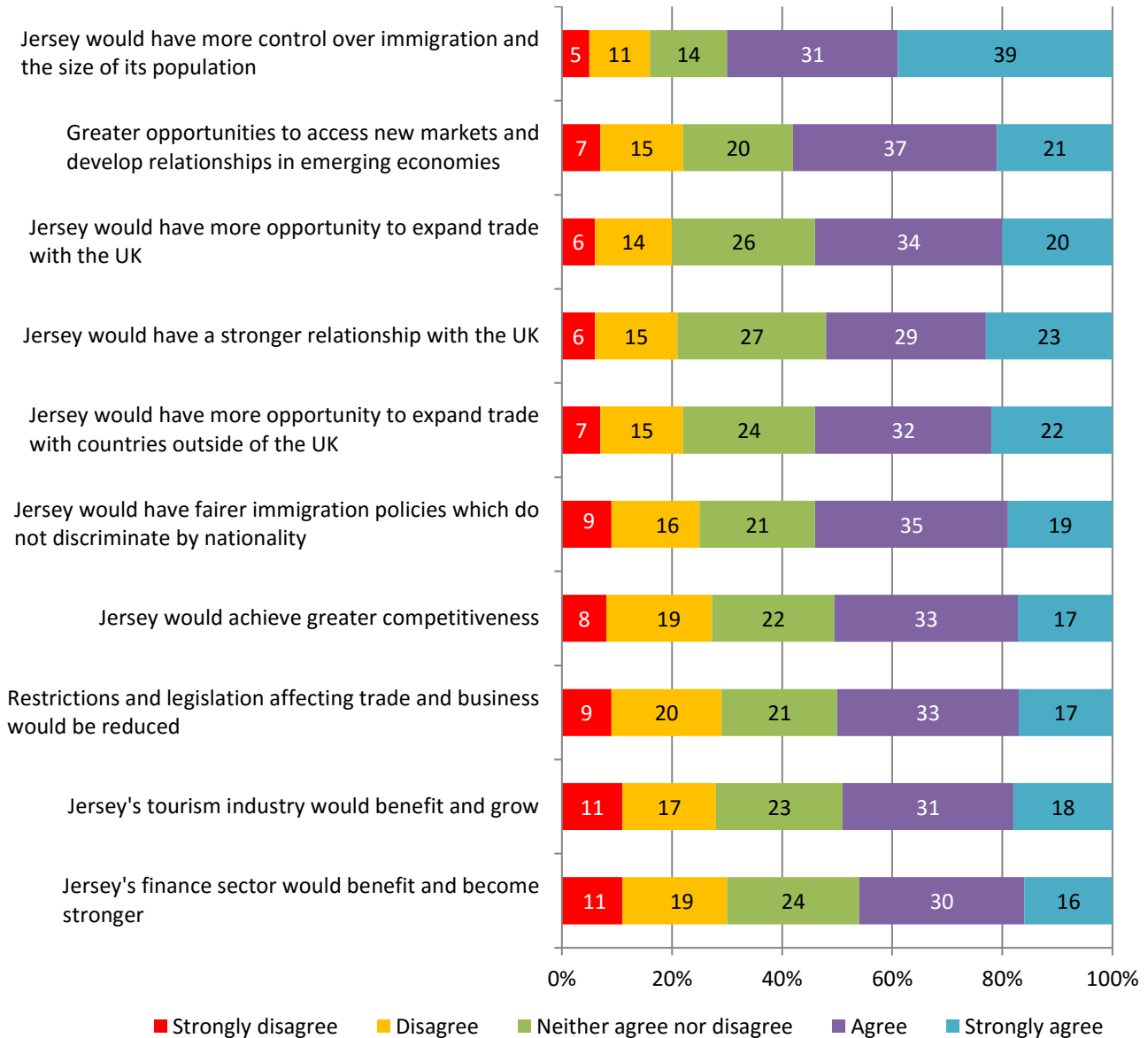
Excluding these, the main additional concerns expressed in order of importance were as follows:

- 1) Jersey to be either disregarded by the UK in its negotiations, or used as a bargaining chip.
- 2) Post-Brexit, the EU to blacklist Jersey as an offshore tax haven.
- 3) Jersey will follow the UK too closely and will become even more dependent.
- 4) Negative impact on trade and access to markets.
- 5) Knock-on effects of a negative impact on the UK economy will impact upon Jersey.
- 6) The impact on the rights of Jersey residents to live and work in the EU.
- 7) More isolation / less cultural diversity.
- 8) A rise in xenophobia and racism.
- 9) The UK may become a competitor to Jersey – tax rates and finance industry.
- 10) The impact on environmental protection through the loss of positive EU legislation in this area.
- 11) Impact on fishermen and fishing rights.
- 12) A fear of uncertainty.
- 13) Weakening links with France and the Continent – including travel link.
- 14) Reduced number of visitors to Jersey with resulting impact on tourism industry.
- 15) Loss of educational opportunities (e.g. Erasmus grants).
- 16) The impact on property ownership in the EU.
- 17) Changes to legislation and the costs associated with this.
- 18) The loss of Jersey's emergency medical arrangements with France.
- 19) A future negative perception and attitude toward Jersey and the UK from the EU.
- 20) Impact on the future ease of travel – not just the cost.



### 3.5 How strongly do you agree or disagree with the following statements with regard to the potential opportunities to Jersey following Brexit?

The graph below shows the statements in order of agreement:



**Sample size: 611 to 637**

For all of the above potential opportunities, there was a higher proportion of respondents who agreed rather than disagreed, and for all apart from the bottom 2, at least half of the respondents said that they either 'agreed' or 'strongly agreed'. The greatest opportunity was perceived to be Jersey having more control over immigration and the size of its population, followed by opportunities to develop relationships and expand trade in new markets. There was also a strong level of agreement that Brexit could present an opportunity to further develop Jersey's relationship and trade with the UK.

The lowest level of agreement was that Brexit would benefit either Jersey's finance industry or Jersey's tourism industry, although these statements both still held positive levels of agreement.



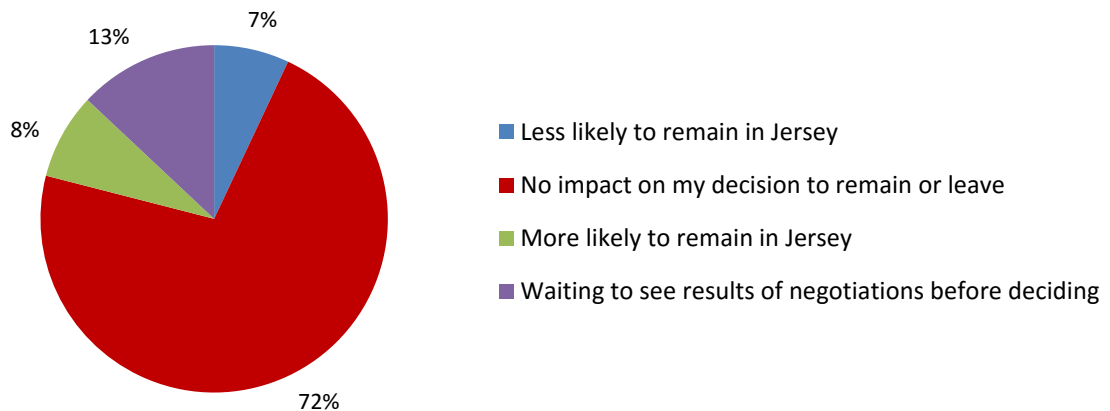
### 3.6 What other opportunities do you think Brexit could present for Jersey?

As with the previous open-ended question, many of the responses to this question reiterated pre-coded opportunities already included in the graph on the previous page; particularly opportunities to control immigration and Jersey's population size, as well as opportunities to develop trade and relationships outside of the EU.

Excluding these, the main additional perceived opportunities, in order of mentions, were as follows:

- 1) Jersey would have more self-determination to choose its own strategic direction.
- 2) Weaker sterling could provide opportunities for Jersey's export industries.
- 3) More stimulus would exist to diversify Jersey's economy.
- 4) There would be more job opportunities for residents and Jersey's younger generation.
- 5) More opportunities in the IT/digital sector.
- 6) Jersey's agricultural sector could benefit.
- 7) Improved fishing rights.
- 8) More innovation.
- 9) More inter-Island cooperation between Jersey and Guernsey.
- 10) Jersey's international identity could be strengthened.

### 3.7 To what extent has Brexit affected your intentions to remain resident in Jersey?

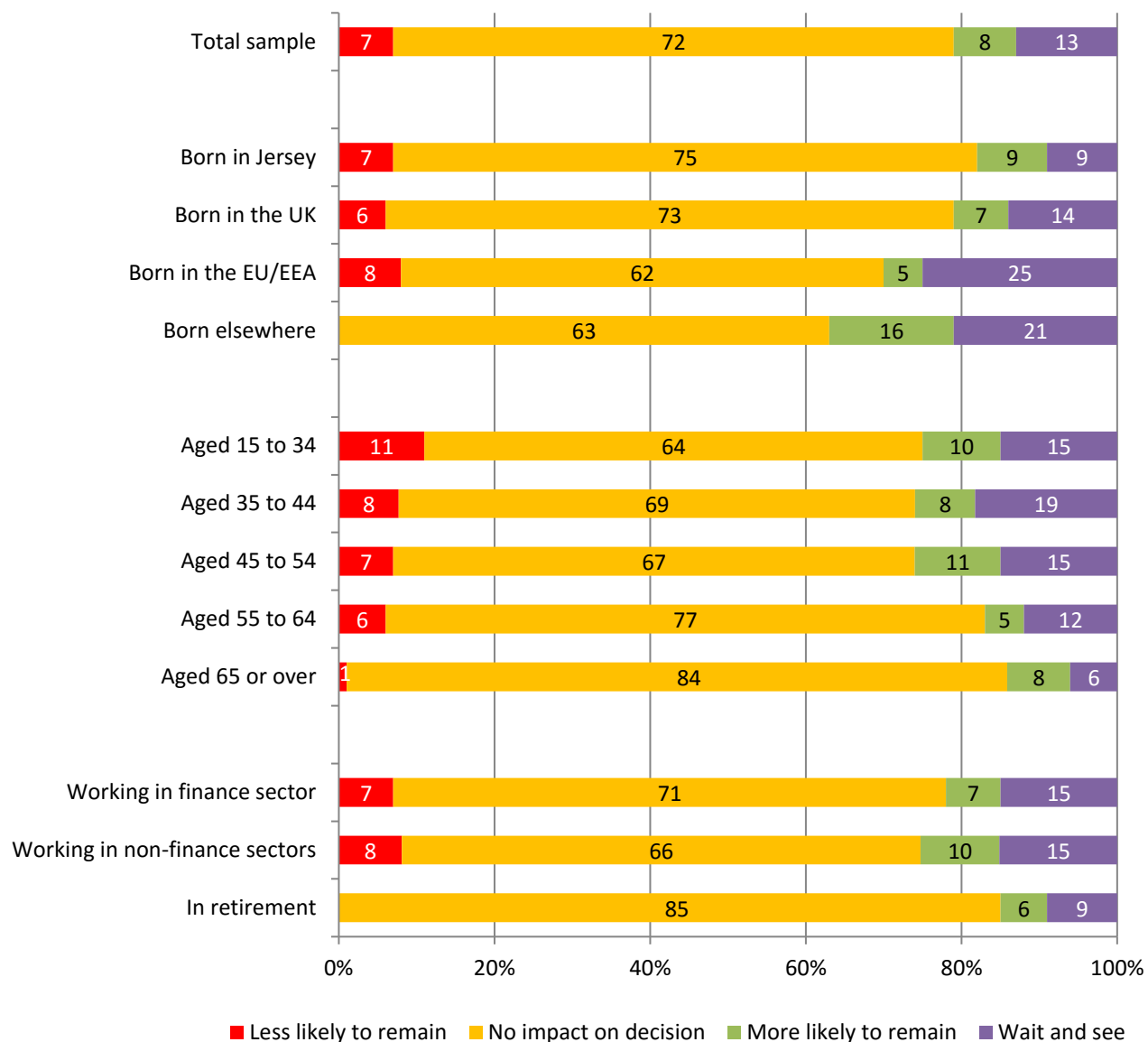


Sample size: 627

N.b. 'Don't know/Not applicable' excluded from the above

Nearly three-quarters of the total sample said that the Brexit decision had had no impact on their decision to remain in or leave Jersey. A fairly similar proportion said that they were more (8%) and less (7%) likely to remain in Jersey as a result of Brexit.

The main differences in response to this question are shown in the graph below:



### Sample sizes vary

As might be expected over 80% of those born in Jersey or in the UK said that the Brexit decision had no impact on their decision or made them more likely to remain in Jersey.

A good majority of two-thirds of residents born in the EU or EEA said that the Brexit decision either had no impact on their decision to remain in Jersey or made them more likely to remain. However, one in four said that they would wait to see the result of negotiations before deciding.

The impact of Brexit looks to have affected Jersey’s younger generation to a greater extent, with a slight majority of those aged under 35 saying that they would be less likely rather than more likely to remain in Jersey, whereas Brexit has had very little impact on those aged 65 or over and those in retirement. Looking ahead, Jersey could potentially be looking to attract more local residents into employment to

support the growing population in retirement, so a greater impact on the youngest age group could be of concern.

The graph on the previous page shows as many working in the finance sector would be likely to remain as stay as a result of Brexit, and a slight majority of those working in the non-finance sectors would be likely to remain.

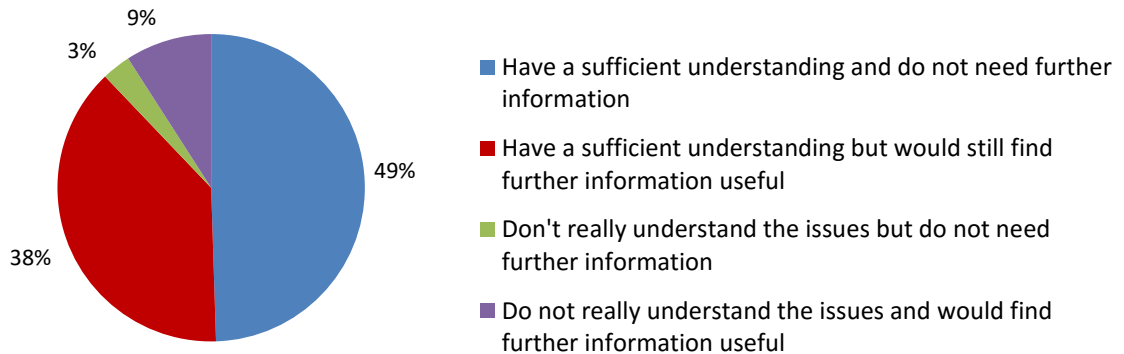
The table below should be treated with some caution due to the relatively small sample sizes, but looking at some other important industries to the Island shows:

Industry worked in	Sample size	Less likely to remain	No impact on decision	More likely to remain	Waiting for results of negotiations
Construction & Tradesmen	35	0%	77%	14%	9%
Wholesale & Retail	36	14%	61%	14%	11%
Education	38	8%	61%	10%	21%
Health	28	4%	61%	21%	14%
Public sector (excluding education & health)	56	5%	80%	5%	9%
Information & communication services	34	18%	56%	3%	23%
Banking	35	9%	80%	6%	6%
Fund administration & Investment advisory	25	16%	68%	4%	12%

The main industry that would appear to be potentially impacted above is Information and Communication Services which includes IT, digital, telecoms, marketing and advertising.

## Section 4 – Understanding of Brexit and requirements for additional information

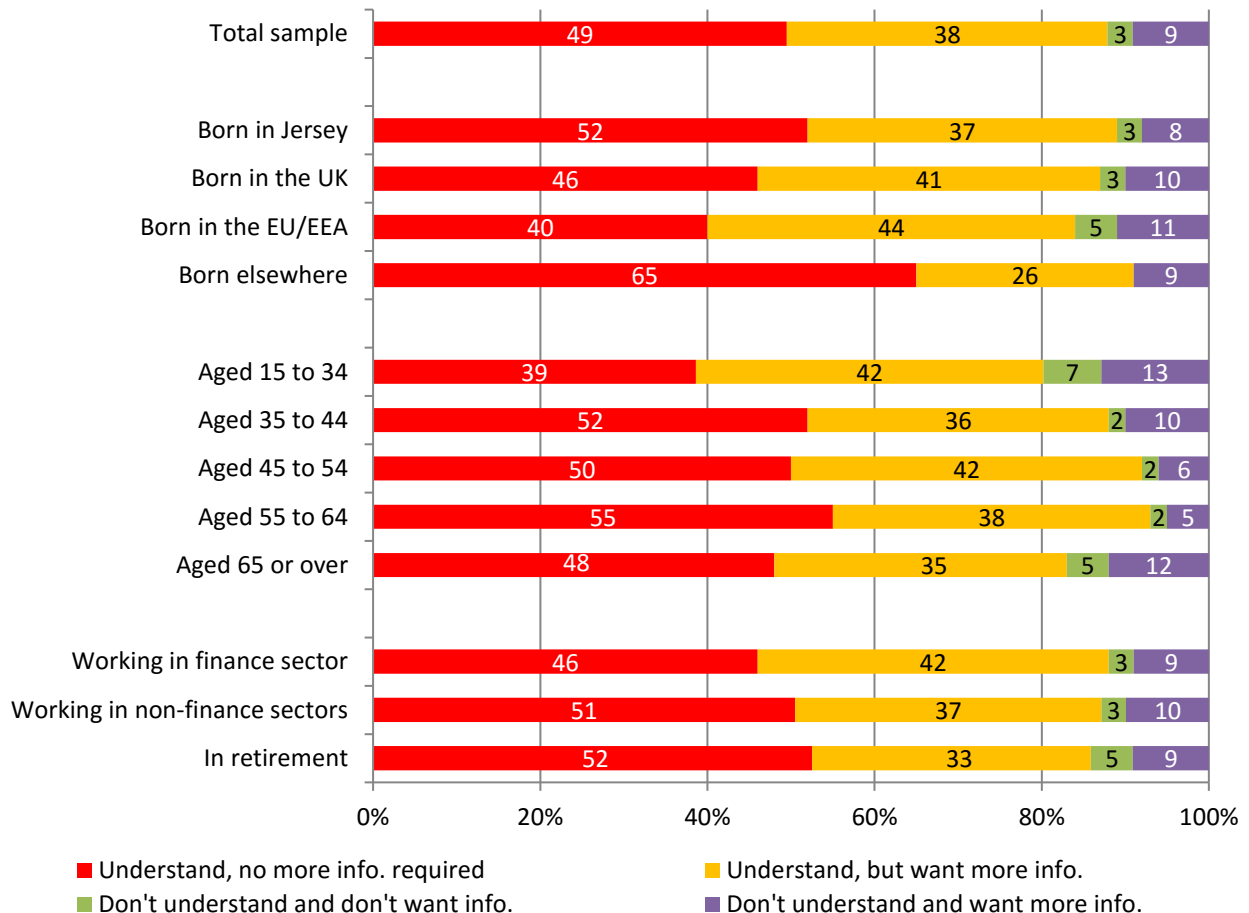
### 3.8 With regard to the implications of Brexit on the UK and Jersey, do you feel you sufficiently understand the issues, or would you like to receive more information?



Sample size: 621

Overall, a fairly high proportion of 87% of respondents felt that they already had a sufficient understanding of the issues associated with Brexit. Only 3% might be considered as 'disinterested' in that they did not understand the issues and also did not want to receive any further information. Almost half of the sample said that they would like to receive further information.

Differences in response to this question are shown in the graph below:



### **Sample sizes vary**

A large proportion from all nationalities (over 80%) claimed to have a sufficient understanding of Brexit, and those born in the EU or EEA were the most likely to require additional information (55%).

The youngest age group (aged 15 to 34) claimed to have the lowest level of understanding of Brexit (46%) and were also most likely to find additional information useful (55%).

There was a similar level of understanding of Brexit (88%) between those working in the finance and non-finance sectors, but finance sector employees were slightly more likely to feel further information would be useful (51% vs. 47%).

Those who said that they would like to receive further information were subsequently asked in an open-ended question:

### **3.9 What type of information would be most useful and which communication channel would be best for you?**

Firstly, the type of information requested in order of importance:

- 1) Ongoing updates on the progress of negotiations, the decisions reached and the impact and implications for Jersey.
- 2) The information disseminated should contain actual facts, with no bias and no 'spin'.
- 3) Arrangements and interaction between the UK and Jersey Governments as part of the process.
- 4) Jersey's negotiating strategy, its decisions, as well as its strategy to deal with the outcomes.
- 5) Specific information on the likely impact on immigration to Jersey.
- 6) News on any amended laws and the constitutional impact.
- 7) The impact on Island life such as the economy, jobs, the cost of living
- 8) The potential impact on travel.
- 9) The impacts on the finance industry.
- 10) Impacts on the rights of EU nationals in Jersey.

There were also specific individual information requests relating to the impacts on trade arrangements, grants, the cost of higher education, customs tariffs, pet passports and future passport requirements.

The preferred communication channels in order of importance were as follows:

- 1) By email – perhaps an automated system whereby those who subscribe to receive updates automatically get an email when new information or updates become available.
- 2) Online / website / blogs – The gov.je website was frequently mentioned.
- 3) Social media online channels.
- 4) Local media, including television, radio and press
- 5) Flyers / leaflets / booklets
- 6) Postal / direct mail (to distribute the above)
- 7) The JEP specifically, although there were some negative comments about this being an accurate source of disseminating 'true' information.
- 8) Engagement talks / public meetings / briefings
- 9) Newsletters

Other suggestions included a concise video, discussion forums and interviews with industry representatives to highlight their challenges.



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# Appendices

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## Data Preparation & Processing

All returned paper-based questionnaires were hand-edited and coded before data entry. Data entry screens, with controls over incorrect data entry were set up and data inputting was sub-contracted to Jersey Input Direct Ltd.

Computer checks were run to verify data validity and a minimum of 10% of the inputted questionnaires were manually checked for correct data entry.

Once inputted, data was combined with the data from the completed online surveys and was subsequently imported into and analysed using a statistical software package called SPSS.

No names, addresses or emails have been inputted against responses, and open-ended responses have been checked and edited where necessary so that respondents cannot be identified.

## Statistical Reliability and Bias

Sample surveys are always subject to statistical error and the higher the sample size, the lower the margin of statistical variation. The table below gives an indication of the levels of statistical error to which the data are theoretically subject at the 95% Confidence Level.

Sample Size	Research Results				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
50	+/- 8.3	+/- 11.1	+/- 12.7	+/- 13.6	+/- 13.9
100	+/- 5.9	+/- 7.8	+/- 9.0	+/- 9.6	+/- 9.8
200	+/- 4.2	+/- 5.5	+/- 6.4	+/- 6.8	+/- 6.9
400	+/- 2.9	+/- 3.9	+/- 4.5	+/- 4.8	+/- 4.9
600	+/- 2.4	+/- 3.2	+/- 3.7	+/- 3.9	+/- 4.0
800	+/- 2.1	+/- 2.8	+/- 3.2	+/- 3.4	+/- 3.5

Based upon a sample size of 785, a finding that 86% of respondents held the residential and work 'entitled' status means that the population figure is 95% likely to be within the range 83.6% to 88.4%, but is more likely to be near the centre of this range (i.e. closer to the survey sample finding).

With any survey methodology, bias is likely to enter into the sample. This bias is minimised by achieving high response rates and ensuring a random manner of questionnaire distribution. The self-selection methodology, primarily driven by online promotion, could not strictly be described as a scientific, random sampling technique, and the sample of respondents may be affected by certain respondents having more interest in the subject matter. If compared to the total adult population of Jersey, the response rate to this survey was low, and the sample profile, as shown in Section 1, is not completely representative of the resident population, meaning there is a good chance that the overall results contain some bias. Nevertheless, the results should be viewed as a broad representation of views from Jersey's adult population.

