States of Jersey

Statistics Unit

# Jersey Annual Social Survey 2014

# Contents

# Contents

This report presents the results of the 2014 Jersey Annual Social Survey (JASS).

JASS was launched in 2005 to collect detailed information on a wide range of topics on an annual basis. It aims to provide everyone in the Island with a better understanding of social issues in Jersey, particularly the opinions and behaviours of the resident population, primarily so that policy decisions can be made from a more informed standpoint.

JASS is a cross-departmental project. Individual departments ask for topics to be included to meet their priorities, whilst the States of Jersey Statistics Unit independently runs the survey, undertakes the analysis and publishes the results. This approach reduces the number of times households are contacted for information and is a less costly way of collecting data. It also provides a richer dataset to allow more interesting and informative analysis.

Questions are included in the survey for one of three distinct purposes:

- to provide benchmark data to measure change (for example: health status, rating public services);
- to provide information to assist the development of policy (for example Government priorities); and
- to gauge public opinion (for example rating the range of leisure activities in the Island).

A small number of core questions are asked each year to monitor aspects such as population demographics, economic activity and household structure on an annual basis.

Additional topics covered in 2014 include: household finances, zero-hours contracts, Fort Regent, energy saving, food supplies in Jersey.

## Sample size and response rate

Around 3,200 households were selected at random to complete the survey in May and June 2014. In order to cover the entire adult population at random, the household member who next celebrated their birthday, and who was aged 16 years or over, was asked to complete the form.

The response from the public was extremely high, with 52% of eligible households completing and returning the forms. In addition to the very good response rates overall, statistical weighting techniques have been used to compensate for different *patterns* of non-response from different sub-groups of the population. The result is that the survey results can be considered broadly accurate and representative of Jersey's population. However, as with all sample surveys there is an element of statistical uncertainty in looking at very small changes or differences (see Annex). Therefore, the report focuses on *significant* findings, for example where differences between groups of the population are at least 10 percentage points.

JASS 2014 has been successful with the help of over 1,600 people who completed and returned the questionnaire.

**The Statistics Unit wishes to thank all the respondents.**

This survey is completed by persons aged 16 years or over, so where any of the terms ‘adult’, ‘public’, ‘residents’, ‘population’ or ‘people’ is used it refers to this age group, unless otherwise specified.

## Category Definitions

For results published by tenure:
- ‘Social rent’ includes States, housing trust and parish rental accommodation
- ‘Private rent’ includes ‘sheltered/disabled accommodation’
- ‘Non-qualified accommodation’ includes non-qualified ‘rented’ accommodation, registered lodging houses, private lodging arrangements and staff or service accommodation.

## Rounding

Numbers are rounded to nearest integers. All calculations are independently rounded and so totals in published tables may not necessarily sum to the corresponding row or column totals.

## Low numbers

‘-’ signifies a blank cell
‘~’ is used where a value is positive, but less than 0.5%

## Confidence intervals

With the survey methodology used, we can be 95% confident that the sample percentages accurately represent the whole population percentage to ± 2.4 percentage points. Where analysis is done by gender, percentages are accurate to ± 3 percentage points. Please see Annex for more details.

## Weighting

Even with the high response rate, it is important to ‘weight’ responses to ensure that the responses as a whole are fully representative of the Island’s adult population. This methodology makes slight adjustments to compensate for certain subgroups of the population being less likely to respond. See Annex for more details. All analysis presented in this report uses weighted responses.

## Further information

For further information about the Statistics Unit and access to all our publications, please see www.gov.je/statistics.

**ILO UNEMPLOYMENT:** The International Labour Organisation (ILO) measure of unemployment in June 2014 was 4.6%, corresponding to 2,800 people being unemployed and looking for work.

**ZERO-HOURS CONTRACTS**: Around three-quarters (76%) of workers on zero-hours contracts reported being either 'very' or 'fairly' satisfied with the type of contract, identifying the flexibility as one of the main benefits. Lack of employment benefits and difficulties arranging a mortgage or loan were a significant problem for around one in six of those on zero-hours contracts.

**GOVERNMENT PRIORITIES**: Three-fifths (62%) of adults felt the government should give 'controlling the population level' very high priority, with the next most frequently identified 'very high' priority issues being 'maintaining high levels of public services', 'maintaining a healthy economy' and 'maintaining Jersey's low-tax system'.

**COPING FINANCIALLY**: One in four households (25%) reported finding it either 'quite' or 'very' difficult to cope financially, a proportion unchanged from 2010. Almost one in three (29%) said their financial situation was 'a little' or 'much' worse than a year previously, a lower proportion than in 2010 (40%).

**GOING WITHOUT**: One in ten households (10%) reported going without a cooked main meal every day at least 'sometimes' due to a shortage of money, a proportion not significantly different from that in 2010.

**PAYDAY LOANS**: A small proportion (2%) of households had taken out a payday loan in the previous 12 months.

**PAY INEQUALITY:** Two in five (43%) adults (whether employed or not) felt that, in general, men earned more than women for the same work. However, only one in eight (12%) adults who were currently in employment felt that this was true *in their particular place of work*.

**WORKING PARENTS:** Over half (56%) of all adults agreed that 'being a working parent has an impact on pay or opportunities for a higher paid job', with this proportion rising to over two-thirds (68%) of those who were working parents. However, this reduced to a quarter (24%) who agreed at some level that '*in my place of work* being a working parent has an impact on pay or opportunities for a higher paid job'.

**SAVING ENERGY:** Over nine in ten residents (93%) reported actively trying to save energy at home or work.

**HOME HEATING:** Almost a sixth (15%) said they had no idea how much they spent on a monthly basis to heat their home.

**FOOD SUPPLIES:** A quarter (24%) believed the main supermarkets would be able to keep their shelves stocked for about a week if they suddenly didn't receive any deliveries from outside of Jersey; over half (54%) thought that supermarkets would be able to keep their shelves stocked for a few days. In an emergency situation, if supplies weren't able to get to Jersey, more people agreed it would be up to the government than those who agreed it would be up to the supermarkets, to make sure there was enough food available for Islanders to buy.

**GROW YOUR OWN:** A quarter of households (27%) in Jersey reported growing their own vegetables and almost a fifth (18%) grew their own fruit.

**SMOKING:** The proportion of adults who smoke in Jersey has not changed significantly for a number of years, with one in six (16%) adults smoking daily, and an additional 6% smoking occasionally but not every day.

**SMOKER HOUSEHOLDS**: One in eight households (13%) had someone who smoked regularly in the home. One in ten households (10%) who had children either living in the household or being looked after in the home also had someone who regularly smoked inside their home.

**CRIME IN JERSEY:** Level of concern over different types of crime has continued to reduce. Around one in five adults were 'fairly' or 'very' worried about being threatened or verbally abused in the street (19%), having their vehicle or property vandalised (18%) or being burgled (17%).

**FORT REGENT**: Over two-fifths of adults (44%) had not visited Fort Regent in the previous 12 months. One in six (15%) visited the Fort monthly or more often during the previous year. Overall, around half of adults who had visited the Fort in the previous year had used facilities for children (play areas, sports classes or other activities); two-fifths (40%) had gone to watch a performance by a band, musician or comedian; and three out of ten (29%) had attended the gym and/or fitness classes.

**TRAVEL TO WORK:** Modes of travelling to work had not changed significantly during the past 5 years with over half (55%) of people using the car to get to work.

**FLYING OUT OF JERSEY:** On average (median), residents took three trips out of Jersey Airport during the previous 12 months (whether for business or leisure). Nearly a fifth (18%) of adults had not flown out of Jersey Airport over the preceding 12 months.

**JERSEY AIRPORT:** Over nine in ten (96%) adults rated their journey experience through Jersey Airport during the previous 12 months to be either 'very good' (39%) or 'good' (57%).

**TAKING THE FERRY FROM JERSEY:** Two-fifths of adults (41%) had not taken the ferry, either to France or the UK, in the previous 12 months; a quarter (25%) had taken the ferry just once in the preceding year.

**JERSEY FERRY TERMINAL:** Nine in ten (90%) adults rated their journey experience through the ferry terminal over the previous 12 months to be either 'very good' (22%) or 'good' (68%).

**ACCESSING TV CHANNELS:** Around half of households (54%) watched satellite TV with a monthly subscription on their primary TV set, and an additional 13% watched satellite TV without a monthly subscription. Less than one in twenty households (3%) reported not watching TV in their home.

The 2011 Census report (see www.gov.je/census) provides full demographic information for the whole of Jersey's population. **The Jersey Annual Social Survey enables monitoring of population characteristics on an annual basis.**

## Economic Activity

### Table 1.1 Employment status (percent)

| | | JASS 2014 | Census 2011+ |
|---|---|---|---|
| Economically Active | Working for an employer | 63 | 57 |
| | Self employed, employing others | 4 | 3 |
| | Self employed, not employing others | 4 | 4 |
| | Unemployed, looking for work | 2 | 3 |
| Economically Inactive | Retired | 18 | 17 |
| | Homemaker | 3 | 6 |
| | Unable to work due to long-term sickness / disability | 2 | 3 |
| | Full-time education | 2 | 5 |
| | Unemployed, not looking for work | ~ | 1 |
| **Total** | | **100** | **100** |

The **economic activity rate** gives the proportion of those in employment, or actively seeking employment, as a percentage of *all* those of working age (between 16 and 64 years for men, and 16 and 59 for women, inclusive).

Due to a higher tendency for working adults to respond to the JASS questionnaire, the economic activity rate continues to be slightly higher in the JASS survey compared to the full population census figure seen in 2011 (see Table 1.2).

### Table 1.2 Economic activity rates (working age adults, percent)

| | JASS 2014 | Census 2011 |
|---|---|---|
| Men (16-64 years) | 92 | 86 |
| Women (16-59 years) | 83 | 77 |
| **All** | **88** | **82** |

## Profession

Almost a fifth (19%) of workers were employed in routine, semi-routine, manual or service occupations such as van driver, bar staff or farm worker. A similar proportion (17%) reported working in a clerical or intermediate profession, such as nursery nurse or secretary. A third (35%) worked in a professional occupation which generally required a professional qualification such as accountant or teacher.

**Table 1.3 Professions of workers in Jersey (adults aged 16 years or over)**

| | Percent |
|---|---|
| **Routine, Semi-routine, Manual or Service occupation** *e.g. HGV or van driver, cleaner, porter, packer, sewing machinist, messenger, labourer, waiter/waitress, bar staff, postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, receptionist, sales assistant* | 19 |
| **Technical or Craft occupation** *e.g. motor mechanic, fitter, inspector, plumber, printer, tool maker, electrician, gardener* | 9 |
| **Clerical or intermediate occupation** *e.g. secretary, personal assistant, clerical worker, office clerk, call centre agent, nursing auxiliary, nursery nurse* | 17 |
| **Professional occupation *(generally requiring a professional qualification)*** *e.g. accountant, solicitor, medical practitioner, scientist, civil / mechanical engineer, teacher, nurse, physiotherapist, social worker, welfare officer, artist, musician, police officer (sergeant or above), software designer, fund administrator* | 35 |
| **Middle or Junior Manager** *e.g. office manager, retail manager, bank manager, restaurant manager, warehouse manager, publican* | 11 |
| **Senior Manager** *(usually responsible for planning, organising and co-ordinating work) e.g. finance manager, chief executive* | 9 |
| **Total** | **100** |

## Multiple jobs

More than one in twenty (7%) of those in employment reported working in at least one other job in addition to their main job.

Three-quarters (76%) of those with multiple jobs reported having one additional job whilst the majority of the remainder reported having two additional jobs. People spent an average (mean) of 14 hours per week working in their additional job(s).

## Looking for work

The International Labour Organisation's (ILO) unemployment rate is a globally comparable figure which measures the proportion of unemployed people in the work force. The ILO unemployment rate includes people who are registered as 'actively seeking work' with the Social Security Department and also those people who are not registered as unemployed.

In June 2014 the ILO unemployment rate was estimated to be 4.6%, corresponding to 2,800 people being unemployed and looking for work.

The estimated ILO unemployment rate was 5.7% in June 2013, which corresponded to 3,200 people being unemployed and looking for work at that time.

In June 2014 there were 1,510 people registered with the Social Security Department as 'actively seeking work'.

## Underemployment

Individuals who are working fewer hours than they would like or who would like to change their current working situation are classified as 'underemployed'.

Overall one in eight (13%) workers said they would prefer to work longer hours at their current rate of pay if given the opportunity, ranging from one in four (24%) of those in routine or manual occupations (such as cleaner, farm worker, catering assistant) to around one in ten of those in professional (12%) or managerial (11% in middle manager, 9% in senior manager) roles.

Those wanting to work longer hours would prefer to work an additional 8 hours on average a week at their current rate of pay if given the opportunity.

Expressing the number willing to supply extra hours as a proportion of the total workforce gives an estimate of the underemployment rate. The underemployment rate of 13% from JASS 2014 is lower, though not significantly so, from the 17% found in the 2013 JASS survey.

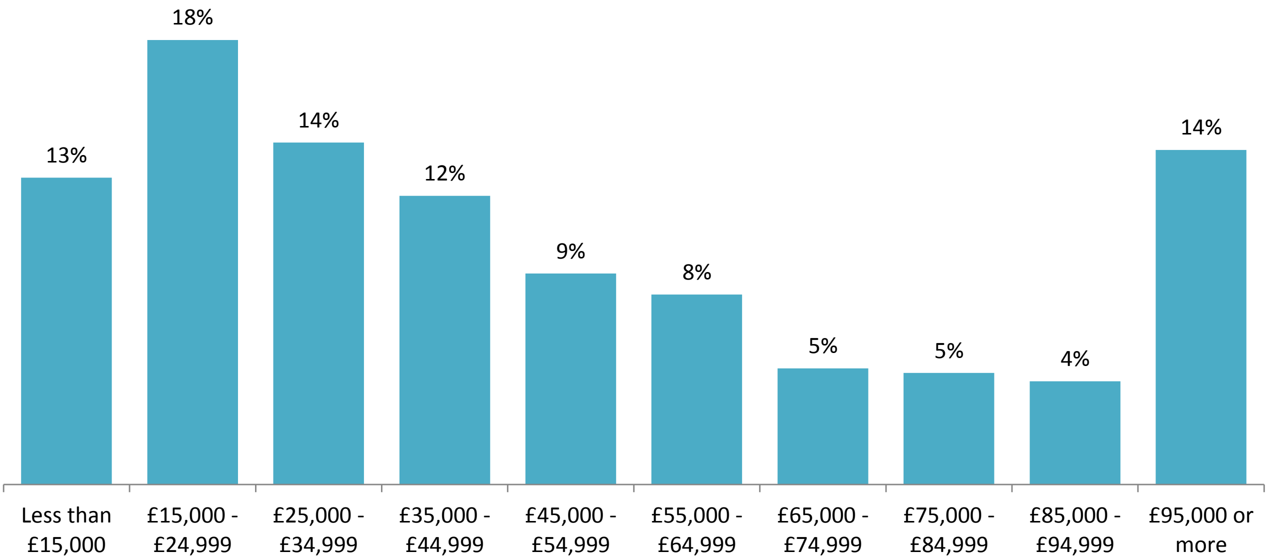
The current financial situation of households in Jersey, particularly from the perspective of being able or unable to cope financially, was explored through a set of questions which were last asked through JASS in 2010.

*It should be noted that due to the weighting methodology adopted in the analysis of this survey, the results presented in this chapter should be regarded as the views of an individual on behalf of the household in which they live, and may not necessarily be the views of all household members.*

## Income characteristics

Figure 2.1 displays the distribution of households according to what they reported as their total household income.

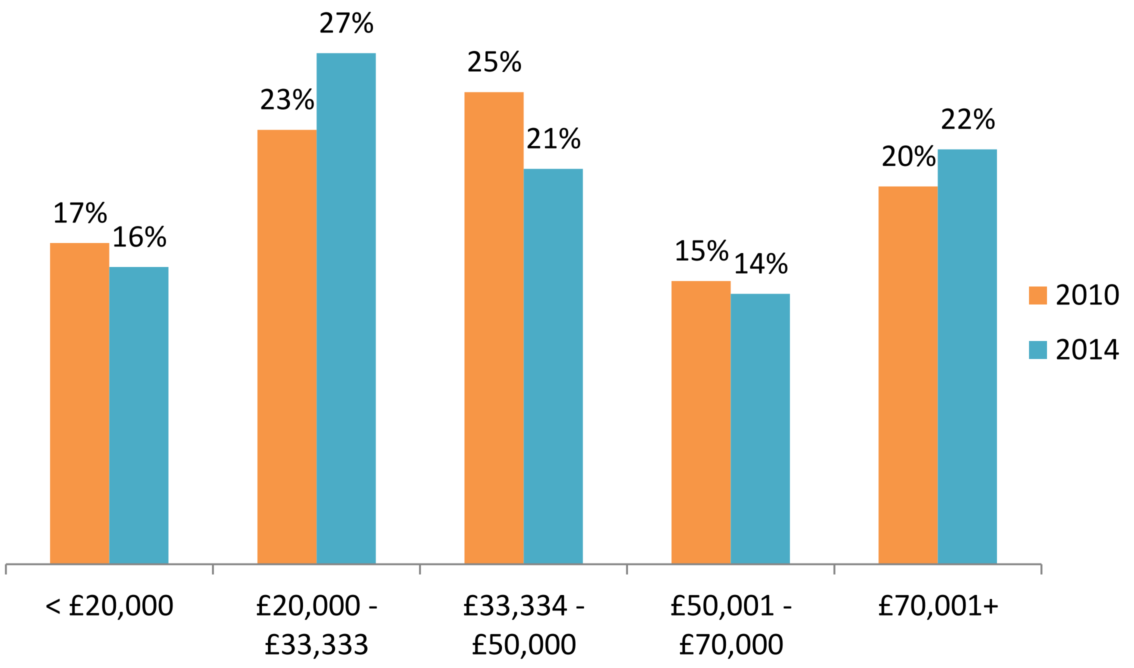
**Figure 2.1 Proportion of households reporting each total household income bracket**




Single person households will tend to have lower income than those with multiple adults. To standardise for this effect and to allow a fairer comparison between households, the total household income is 'equivalised', taking into account the number of adults (aged 16 or over) and children in the household. Equivalisation ensures that those in the highest income group, as reported here, are indeed on a high income relative to other households, and removes the possibility that the household simply has a higher number of earners compared to other households. More detail on equivalisation can be found in the Income Distribution Survey report (2010), published by the Statistics Unit. It should be noted that all subsequent analysis by household income presented in this chapter is based on equivalised income in order to enable a meaningful comparison between households.

The distribution of equivalised income can be compared with that seen in 2010 (see Figure 2.2), and shows little change in the four-year period.

**Figure 2.2 Equivalised household income as reported by JASS in 2010 and 2014 - percentages of households.**




## Coping financially

Households were asked how easy or difficult they find it to cope financially. One in four households (25%) reported finding it either 'quite' or 'very' difficult to cope financially, a proportion which is unchanged from 2010 (Figure 2.3).

However, when asked to compare against a year ago about one in three (29%) said their situation was 'a little' or 'much' worse, a proportion significantly lower than found in 2010 when two in five (40%) had felt their situation had worsened over the previous year (see Figure 2.4), and indicating a slightly improved picture in *relative* terms of households coping financially.

**Figure 2.3 "As a household, how easy or difficult do you find it to cope financially?", 2010 and 2014**

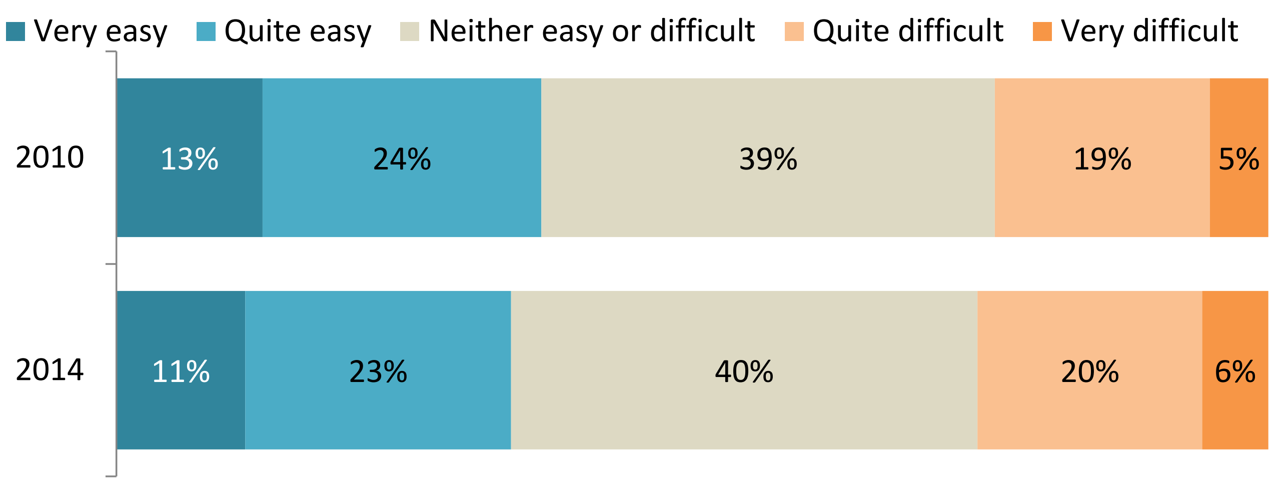
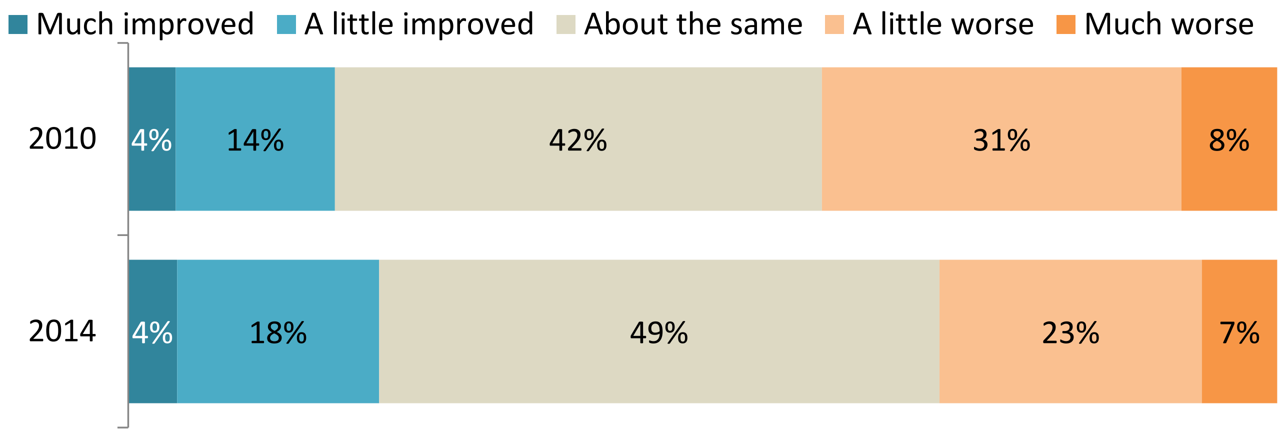


**Figure 2.4 "Comparing back to one year ago, how would you describe your household's financial situation today?", 2010 and 2014**




## Difficulties paying

More specific information was sought in terms of what difficulties households had, particularly with regards to paying for different items and activities. Households were able to identify that a particular item or activity wasn't needed or wanted, and these households have been excluded from the results shown below, which focusses on those that could say 'yes', 'no' or 'sometimes' as to whether they had difficulty paying for certain items. Figure 2.5 summarises the results.

**Figure 2.5 "Does your household have difficulties paying for the following because of a shortage of money?"**

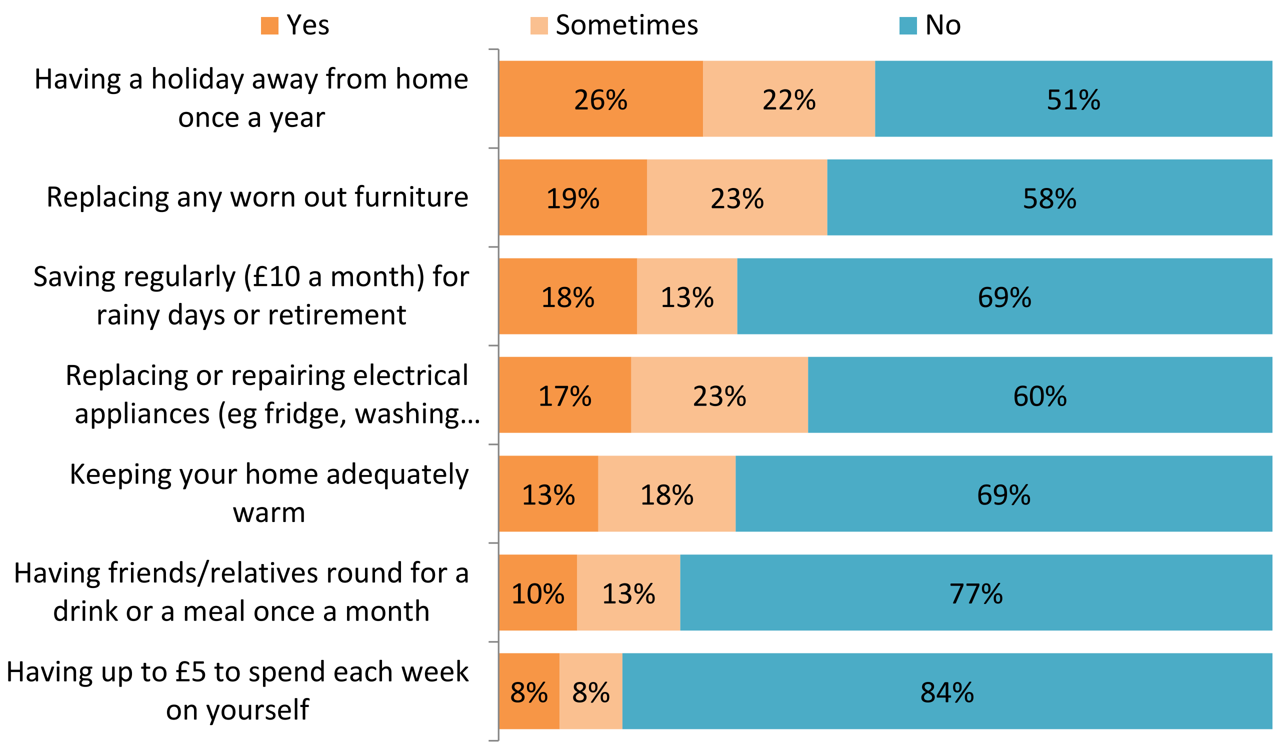


Table 2.1 compares the situation found in 2010 with 2014, focussing on the proportion of households who said they had no difficulty paying for the items or activities. The smaller proportion of households who reported 'no' difficulties for the majority of items or activities in 2014 compared to in 2010 indicates a slightly worsening financial situation for households in 2014. Further exploration indicates that the proportions saying 'yes' for each item or activity has not changed between 2010 and 2014; however, the proportion saying they 'sometimes' had difficulty paying for them due to a shortage of money has increased more recently.

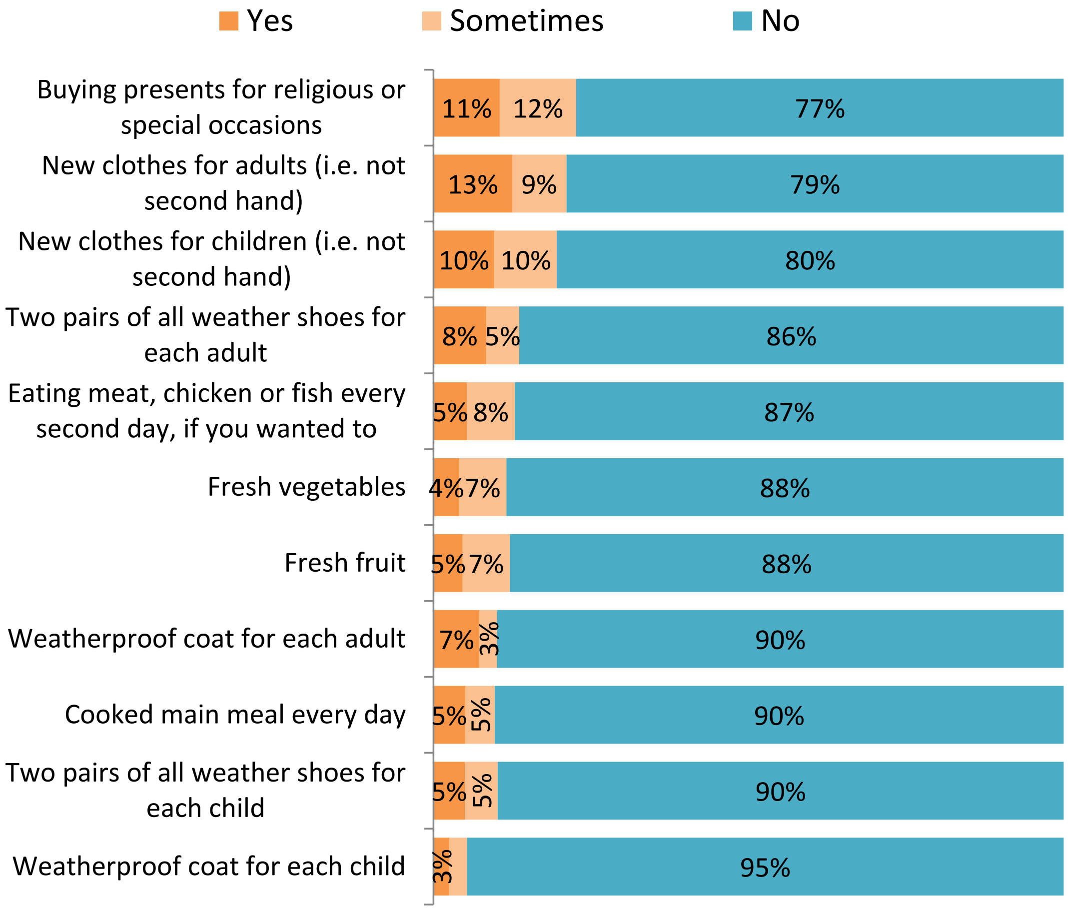
**Table 2.1 "Does your household have difficulties paying for the following because of a shortage of money?" Proportion of households saying 'No', 2010 and 2014, excluding those households for whom the item/activity is 'not needed or wanted'.**

| | 2010 | 2014 |
|---|---|---|
| Having a holiday away from home once a year | 60 | 51 |
| Replacing any worn out furniture | 65 | 58 |
| Saving regularly (£10 a month) for rainy days or retirement | 75 | 69 |
| Replacing or repairing electrical appliances (e.g. fridge, washing machine) | 68 | 60 |
| Keeping your home adequately warm | 77 | 69 |
| Having friends/relatives round for a drink or a meal once a month | 80 | 77 |
| Having up to £5 to spend each week on yourself | 86 | 84 |

## Going without

The next question set asked whether the household had *gone without* certain items because of a shortage of money, for example going without fresh fruit, or a cooked main meal each day. Again, those households reporting that a particular item was 'not needed or wanted' have been excluded from these results.

**Figure 2.6 "Has your household gone without the following because of a shortage of money over the last 12 months?"**




Around a fifth of households reported having gone without new clothes for the children or adults in the household at least 'sometimes', and without buying presents for religious or special occasions, due to a shortage of money. One in ten households (10%) reported going without a cooked main meal every day at least 'sometimes' due to a shortage of money. The results were not significantly different to those seen in 2010.

The highest rates for going without certain items were seen for households living in social housing. A third of such households reported going without new clothes (not second hand) for adults or buying presents and a quarter had gone without new clothes for children or two pairs of all-weather shoes for adults. Around one in twenty owner occupier households reported going without such items.

## Arrears

A small proportion of households reported being in arrears for various bills (see Table 2.2), excluding those households for which the item was not applicable. Nearly one in ten (8%) of households reported being in arrears for rent, and the same proportion for their electricity bill.

**Table 2.2 "Is your household currently in arrears for the following?" (excluding households for whom each item is not applicable)**

| | Yes | No |
|---|---|---|
| Rent | 8 | 92 |
| Mortgage | 3 | 97 |
| Parish rates | 4 | 96 |
| Electricity | 8 | 92 |
| Gas | 4 | 96 |
| Oil | 2 | 98 |
| Water | 3 | 97 |

## Banking and loans

A very small percentage (less than 1%) of households reported being unable to get a current account with a household bank. Three-quarters (75%) had at least one person in the household having a credit card, ranging from half (49%) of those whose equivalised household income was less than £20,000 up to over nine in ten (94%) of those whose equivalised household income was £70,000 or more.

One in ten households (10%) were found to have asked a bank or finance company about help with paying off multiple loans in the previous 12 months, with no significant dependence on the household's equivalised income.

Overall a small proportion (2%) of households had taken out a payday loan in the previous 12 months (a payday loan was defined as 'a small, short-term, unsecured loan, sometimes called a payday advance'). Given the small number of household for whom this was relevant, it is difficult to draw conclusions as to the average size of payday loans taken out through the sample survey, although the results indicated the total amount of money borrowed by these households through payday loans over the previous year was as likely to be around £100-£499 as £2,000 or more.

Exploring other methods of borrowing money, specifically 'hire purchase', credit cards, overdrafts and loans from individuals, showed half of households in Jersey (50%) had not used any of these sources of borrowing money over the previous 12 months. Over a quarter (28%) had used credit cards and a similar proportion (28%) had used overdraft facilities in order to borrow money. One in eight households (13%) reported having borrowed money from another individual in the previous 12 months, whilst one in six (16%) had used hire purchase.

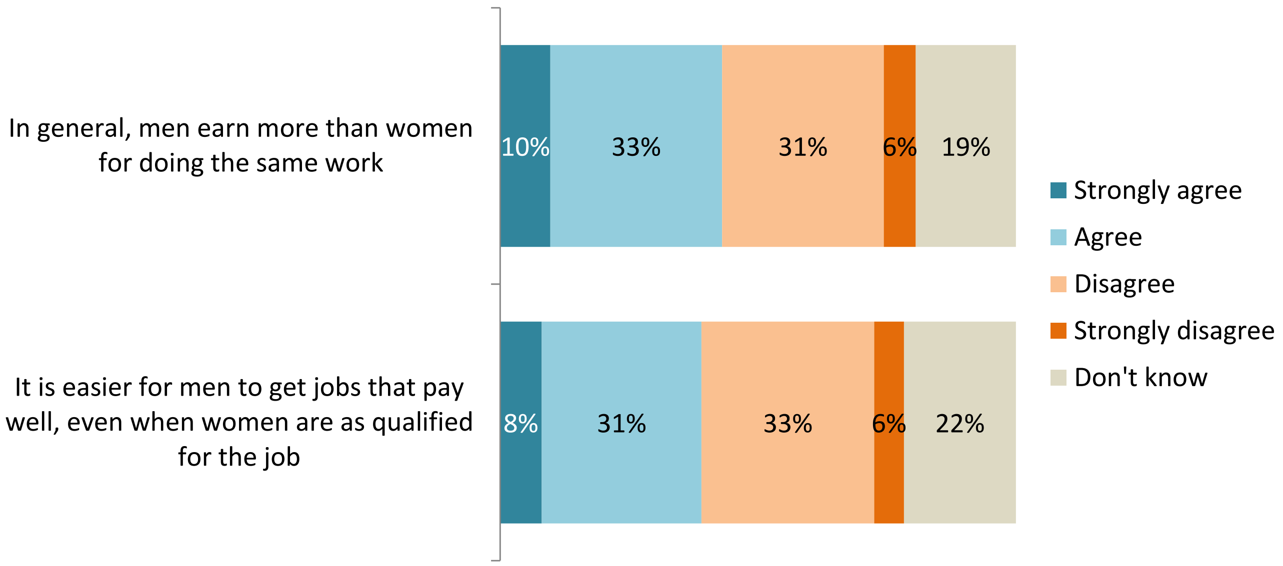
A section was included in JASS 2014 exploring people's attitudes towards pay at work and specifically gender differences in pay and the impact of being a parent.

Questions were asked in a general sense of all respondents – for example asking how much they agreed or disagreed with a statement such as "In general, men earn more than women for doing the same work", and then more specifically of just those respondents currently in employment: "In my place of work, men earn more than women for doing the same work".

## Gender inequality at work

As Figure 3.1 shows, although around two-fifths (43%) of adults agreed at some level that 'in general, men earn more than women for doing the same work', a similar proportion (38%) disagreed at some level. A similar balance of equal proportions agreeing and disagreeing was seen when respondents were asked if they felt 'it is easier for men to get jobs that pay well, even when women are as qualified for the job'.

**Figure 3.1 "How much do you agree or disagree with the following statements?"**



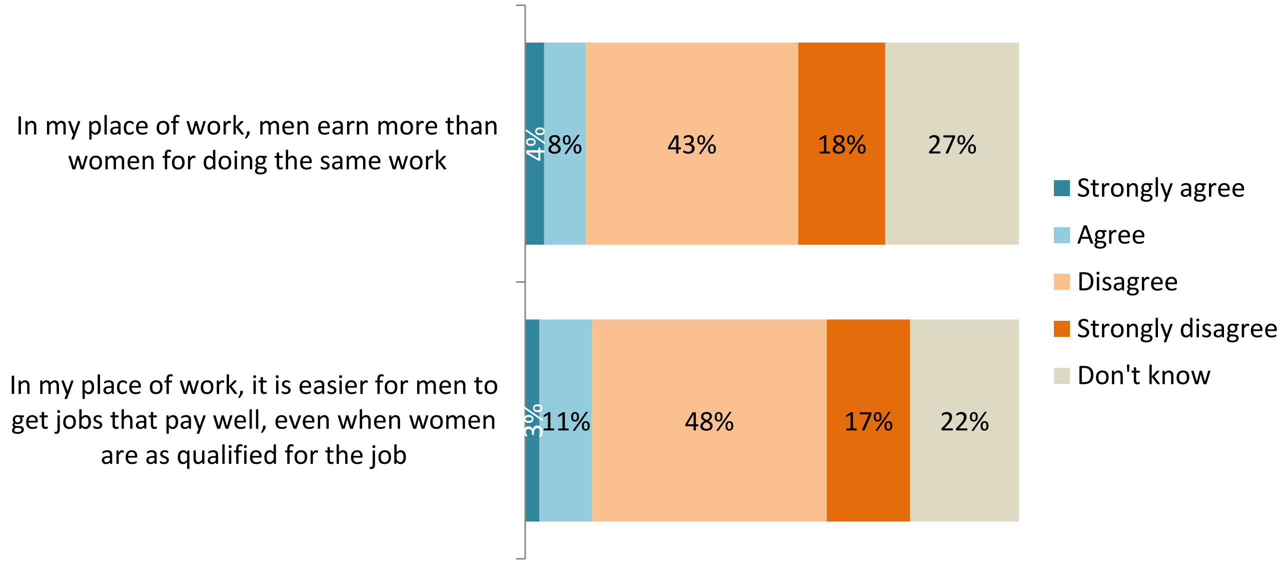

Looking at the results broken down further highlights some differences by gender, whereby higher proportions of women are agreed at some level with the statements about gender inequality at work, compared to men (see Table 3.1).

**Table 3.1 Proportion of men and women who 'agree' or 'strongly agree' with the following statements**

| | Men | Women |
|---|---|---|
| In general, men earn more than women for doing the same work | 33 | 53 |
| It is easier for men to get jobs that pay well, even when women are as qualified for the job | 28 | 50 |

Focussing on just those currently in employment showed a markedly different picture, with much smaller proportions of people agreeing at some level with the two statements (see Figure 3.2); for example, only one in eight (12%) adults felt that in their place of work men earned more than women for the same work, compared to two in five (43%) adults who thought that in general men earned more than women for the same work. This suggests there may be a mismatch between people's general perception of gender inequality at work and what is currently being experienced by those who are actually in employment.

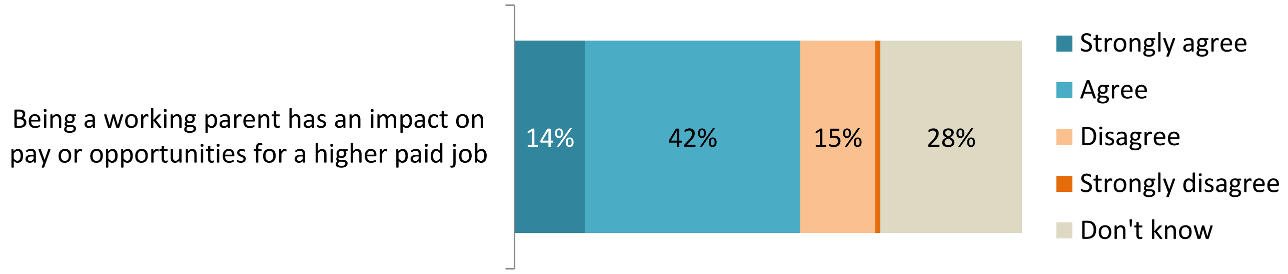
**Figure 3.2 "How much do you agree or disagree with the following statements?" – people in employment**




## Working parents

A third (36%) of those who were currently working reported also being a parent of a child aged under 16 years. Over half (56%) of all adults agreed that 'being a working parent has an impact on pay or opportunities for a higher paid job', with this proportion rising to over two-thirds (68%) of those who were working parents (Figure 3.3).

**Figure 3.3 "How much do you agree or disagree with the following statements?"**




As with the statements around gender inequality, the proportions who agreed that '*in my place of work*, being a working parent has an impact on pay or opportunities for a higher paid job' were lower than those who agreed with this statement 'in general', with just a quarter (24%) agreeing at some level, although this rose to a third (33%) for those who were working parents.

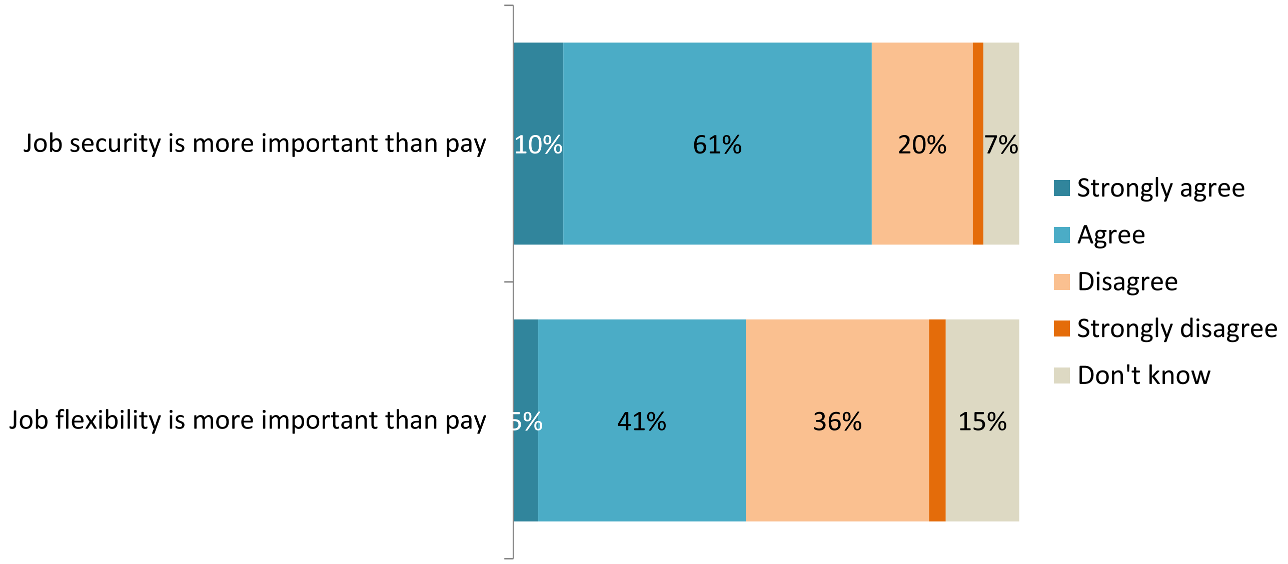
**Table 3.2 Proportion of men and women who 'agree' or 'strongly agree' with the following statements**

| | Working parents | Non-working parents | All adults |
|---|---|---|---|
| Being a working parent has an impact on pay or opportunities for a higher paid job | 68 | 49 | 56 |
| In my place of work, being a working parent has an impact on pay or opportunities for a higher paid job | 33 | 19 | 24 |

## Importance of pay at work

The majority of adults (71%) agreed at some level that 'job security is more important than pay', with one in five (20%) disagreeing. Nearly half (46%) agreed that 'job flexibility is more important than pay', a similar proportion to those that disagreed (39%), see Figure 3.4.

**Figure 3.4 "How much do you agree or disagree with the following statements?"**




## Negotiating pay at work

Those currently in work were asked whether they were willing to negotiate for a pay rise/promotion – over two-thirds (70%) were. There was no significant difference seen between the genders. A higher proportion of those in senior management positions (81%), agreed at some level that they would negotiate for a pay rise compared with lower proportions of adults in other professions (56% of workers in technical or craft occupations and 62% of clerical workers).

**Figure 3.5 "How much do you agree or disagree with the following statements?"**

Those currently working for an employer were asked whether they were on a 'zero-hours' contract of employment. This was defined as 'an employment contract under which the employee is not guaranteed work and is paid only for work carried out'.

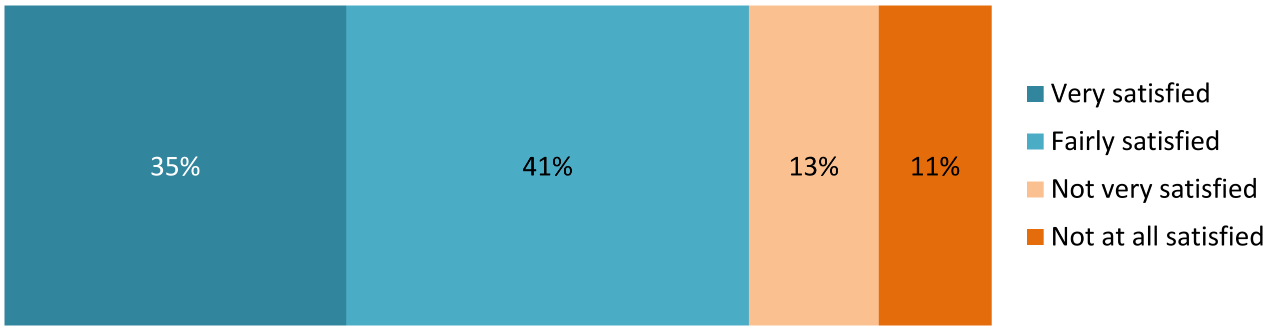
In terms of occupation, almost half (45%) worked in routine or manual type roles (routine occupations include jobs such as cleaner, labourer, waiter), another quarter (24%) in professional occupations (which generally require a professional qualification, such as accountant, teacher or nurse) and a fifth (19%) in technical or craft occupations (which includes mechanics, electricians and plumbers).

## Satisfaction with zero-hours contracts

Those working on zero-hour contracts were asked how satisfied they were being on such a contract.

Figure 4.1 shows that three-quarters (76%) reported being either 'very' or 'fairly' satisfied with being on this type of contract. One in ten (11%) reported being 'not at all' satisfied.

**Figure 4.1 "How satisfied are you with being on a zero-hours contract?"**




## Advantages of zero-hours contracts

Zero-hours workers were asked about potential advantages of being on this type of contract.

Three-quarters of workers on zero-hours contracts identified that the flexibility in hours was relevant for them. A quarter of those on such contracts reported that they 'just wanted occasional hours', and one in eight (13%) liked the flexibility to be able to turn down work at short notice (see Table 4.1).

In contrast, one in five (21%) zero-hours contract staff reported not gaining any advantages from being on a zero-hours contract.

**Table 4.1 "Which, if any, of the following advantages do you gain from being on a zero-hours contract?"** ***(respondents were able to tick more than one option)***

| | Percent of those on 'zero-hours' contracts |
|---|---|
| I like the flexibility in hours as it suits my circumstances | 74 |
| I just want occasional hours | 28 |
| I like to be able to turn down work at short notice | 13 |
| None of the above – I don't gain any advantages from being on a zero-hours contract | 21 |

## Disadvantages of zero-hours contracts

Zero-hours workers were asked about potential problems arising from being employed on such a contract. A number of potential issues with being on a zero-hour contract were listed, and respondents asked to identify which, if any, were slight or significant problems for them.

Table 4.2 provides the full results. Around half of zero-hours contract staff said that 'arranging childcare', 'obtaining a mortgage or loan', 'not being allowed to work for another employer' and 'receiving a lower rate of pay than non-zero hours colleagues doing the same job' were not applicable for them.

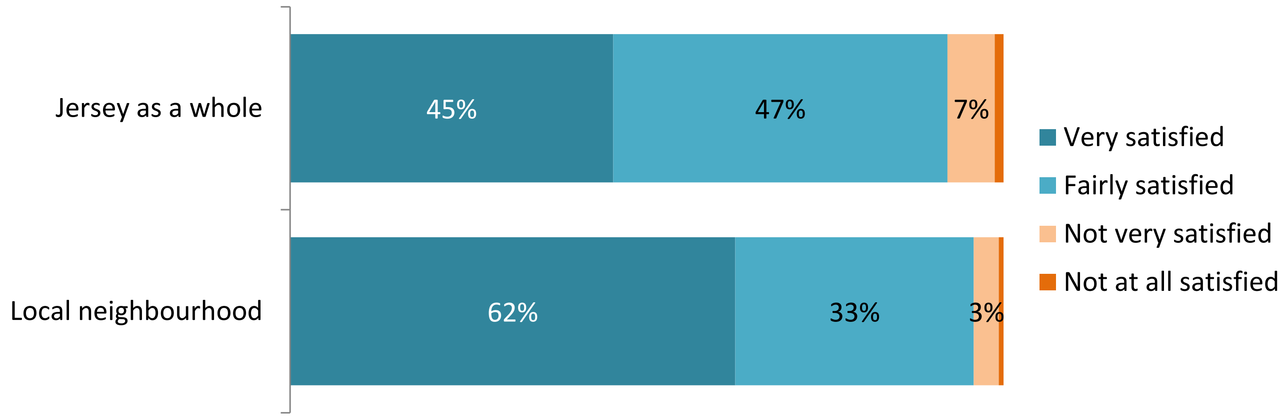
**Table 4.2 "Are any of these a problem for you, as a direct result of being on a zero-hours contract?"**
***Percent of respondents on 'zero hours' contracts***

| | *Not applicable* | Not a problem for me | A slight problem for me | A significant problem for me |
|---|---|---|---|---|
| Arranging childcare | *53* | 27 | 15 | 4 |
| Planning time off for holidays | *9* | 78 | 8 | 5 |
| Obtaining a mortgage or a loan | *51* | 30 | 2 | 17 |
| Not being allowed to work for another employer whilst on zero-hours contract | *51* | 30 | 17 | 2 |
| Less employment benefits (such as pension, sick pay) | *18* | 36 | 32 | 14 |
| Lower rate of pay than colleagues not on zero hours contracts who do same job | *51* | 39 | 7 | 4 |

The most common issue identified as being a problem was having 'less employment benefits such as pension, sick pay', as nearly half (46%) reported this as being either a slight or significant problem for them. 'Planning time off for holidays' and having 'a lower rate of pay than colleagues not on zero-hours contracts but who do the same job' were identified as a problem by just over one in ten of respondents on zero-hours contracts (13% and 11% respectively). The other listed issues, namely 'arranging childcare' and 'not being allowed to work for another employer', were considered a slight or significant problem for around one in five people on zero-hours contracts (19%).

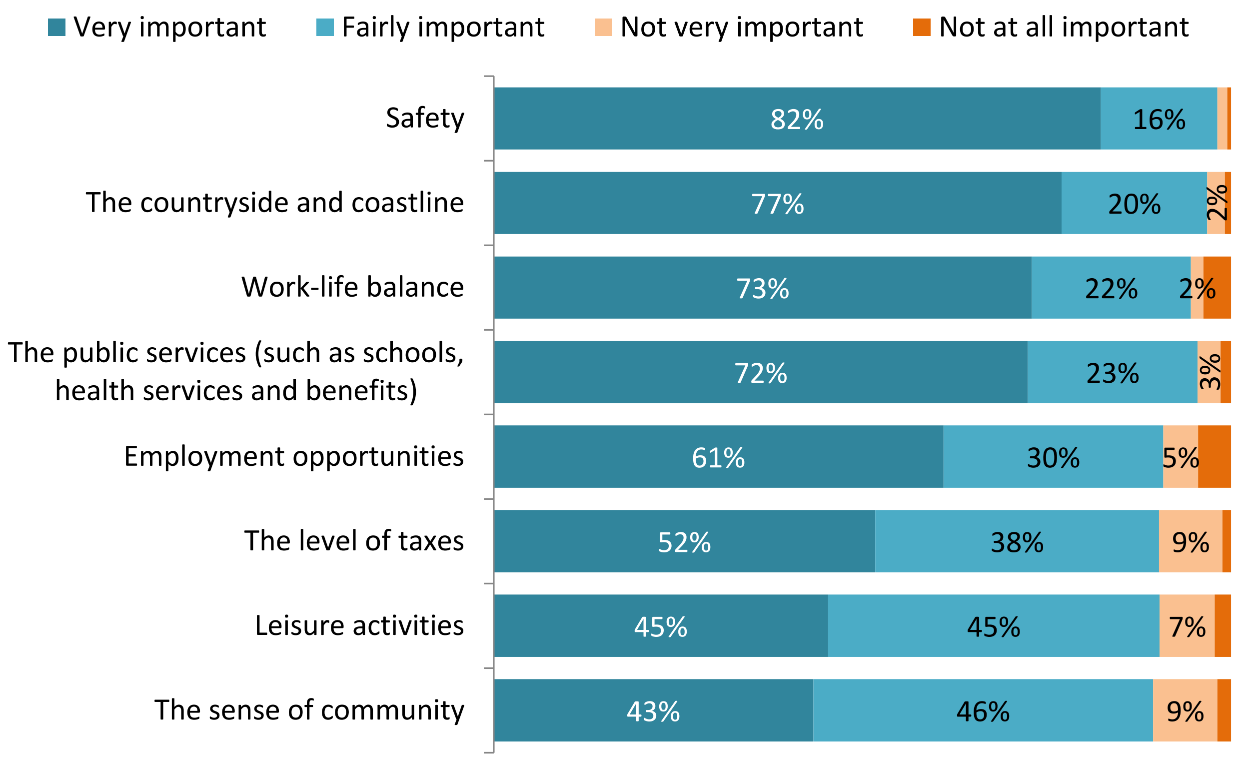
Around nine out of ten adults reported being satisfied with their local neighbourhood. A similar proportion reported being satisfied with living in Jersey as a whole (Figure 5.1).

**Figure 5.1 "As a place to live, how satisfied are you with your local neighbourhood, and with Jersey as a whole?"**




Respondents were asked to rate a number of factors contributing to life in Jersey and how important each was to them; the results are shown in Figure 5.2. 'Safety' and 'the countryside and coastline' were the two most highly rated factors in terms of what residents like about living in Jersey, rated as 'very important' by around four-fifths (82% and 77% respectively).

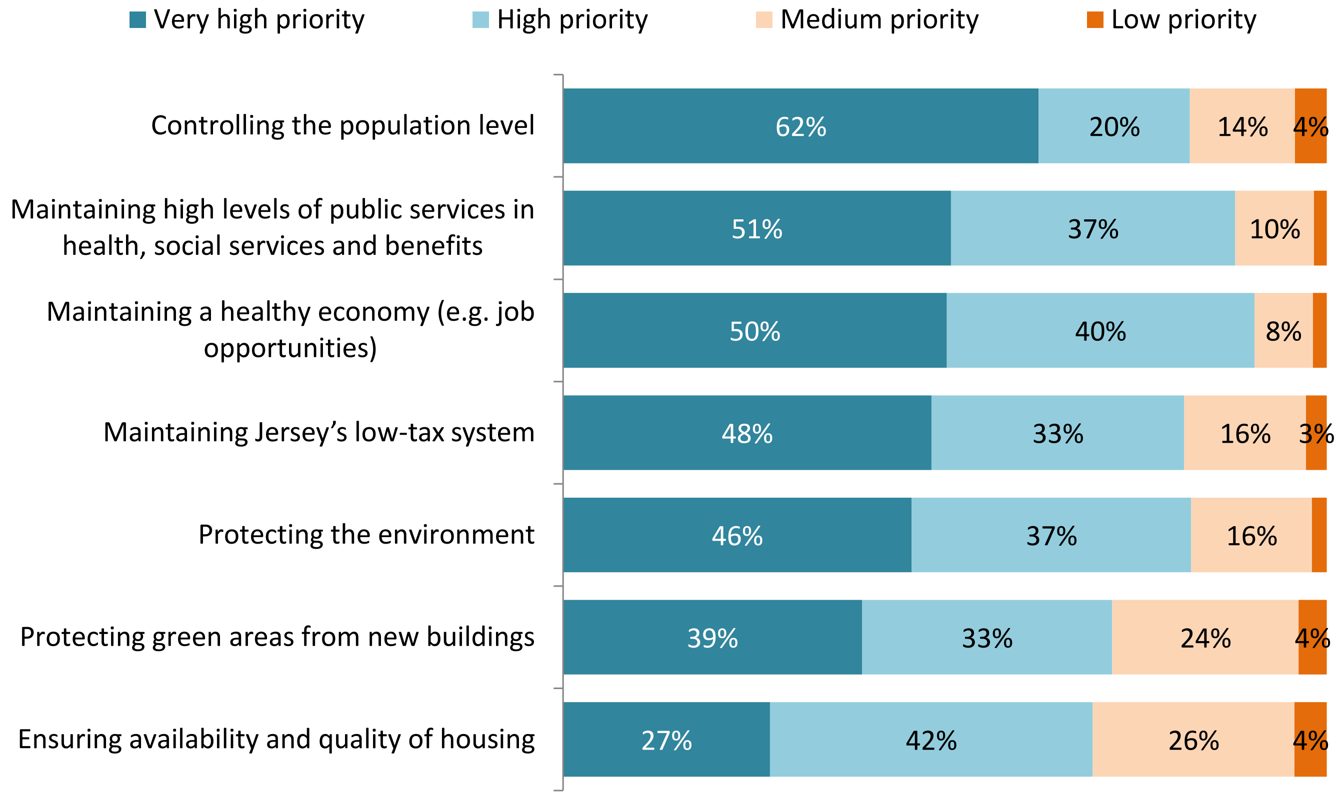
**Figure 5.2 "When you think about what you like about living in Jersey, how important is each of the following factors?"**



## Government priorities

JASS 2014 asked respondents what priority the government in Jersey should give to a range of issues over the next 20 years. Three-fifths (62%) of people felt the government should give 'controlling the population level' very high priority, and around a half felt 'public services', 'maintaining a healthy economy' and 'maintaining Jersey's low-tax system' should be very high priority. Around a quarter (27%) of adults thought that 'ensuring availability and quality of housing' should be given a very high priority by the government in Jersey. Figure 5.3 provides the full results.

**Figure 5.3 "What priority do you think the government in Jersey should give to each of the following over the next 20 years?"**

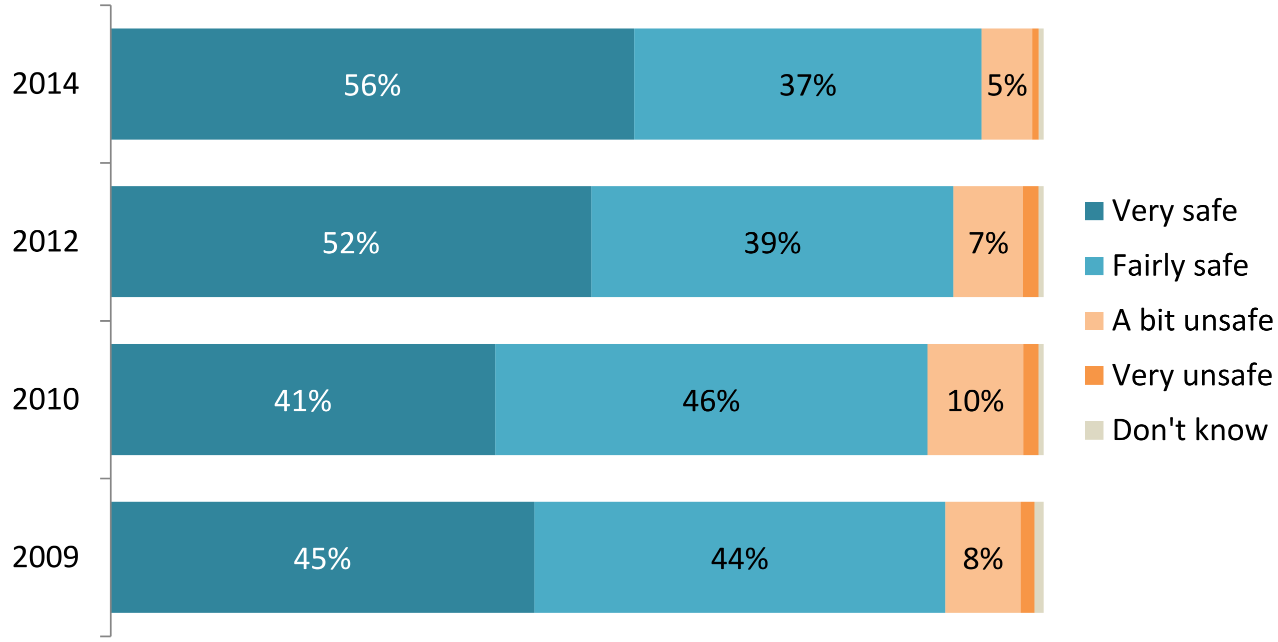



Respondents were asked **'if there was one thing you could change about life in Jersey, what would it be?'** The most commonly raised issue was around controlling the population, with nearly one in six (17%) of those who commented in this section specifying controlling the population and/or reducing immigration as being the one thing they would change. The second most frequently identified topics that respondents identified as wanting to change were around reducing the cost of living, and ensuring housing is affordable.

## Neighbourhood safety

Nine in ten (93%) people felt either 'very' or 'fairly' safe in their neighbourhood (within a 5 minute walk of their home). This proportion has not changed significantly since 2012; see Figure 6.1.

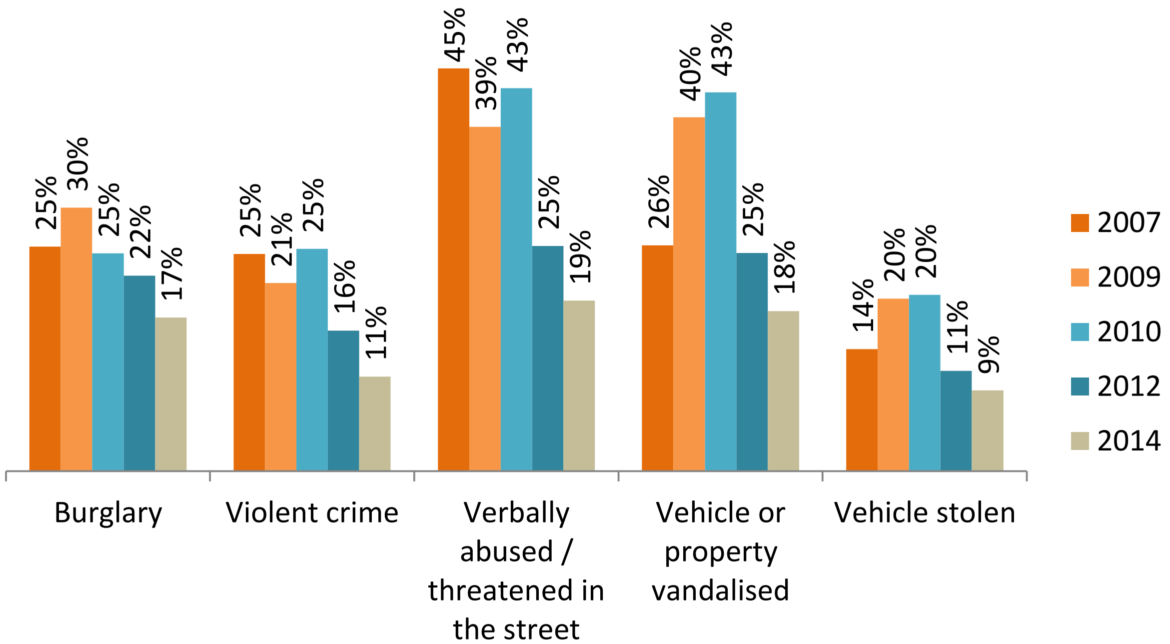
**Figure 6.1 "How safe or unsafe do you consider your neighbourhood to be (within 5 minutes walk of your home)?", by year**




## Concern over crime

Level of concern over different types of crime continued to show a reduction compared to previous years (see Figure 6.2).

**Figure 6.2 "How worried are you that you might become a victim of the following in the next 12 months?" Proportion of adults who answered 'Very' or 'Fairly' worried, by year**



Less than one in five adults were 'fairly' or 'very' worried about being threatened or verbally abused in the street (19%), having their vehicle or property vandalised (18%) or being burgled (17%). One in ten were worried about violent crime (11%) or having their vehicle stolen (9%).

## States of Jersey policing priorities

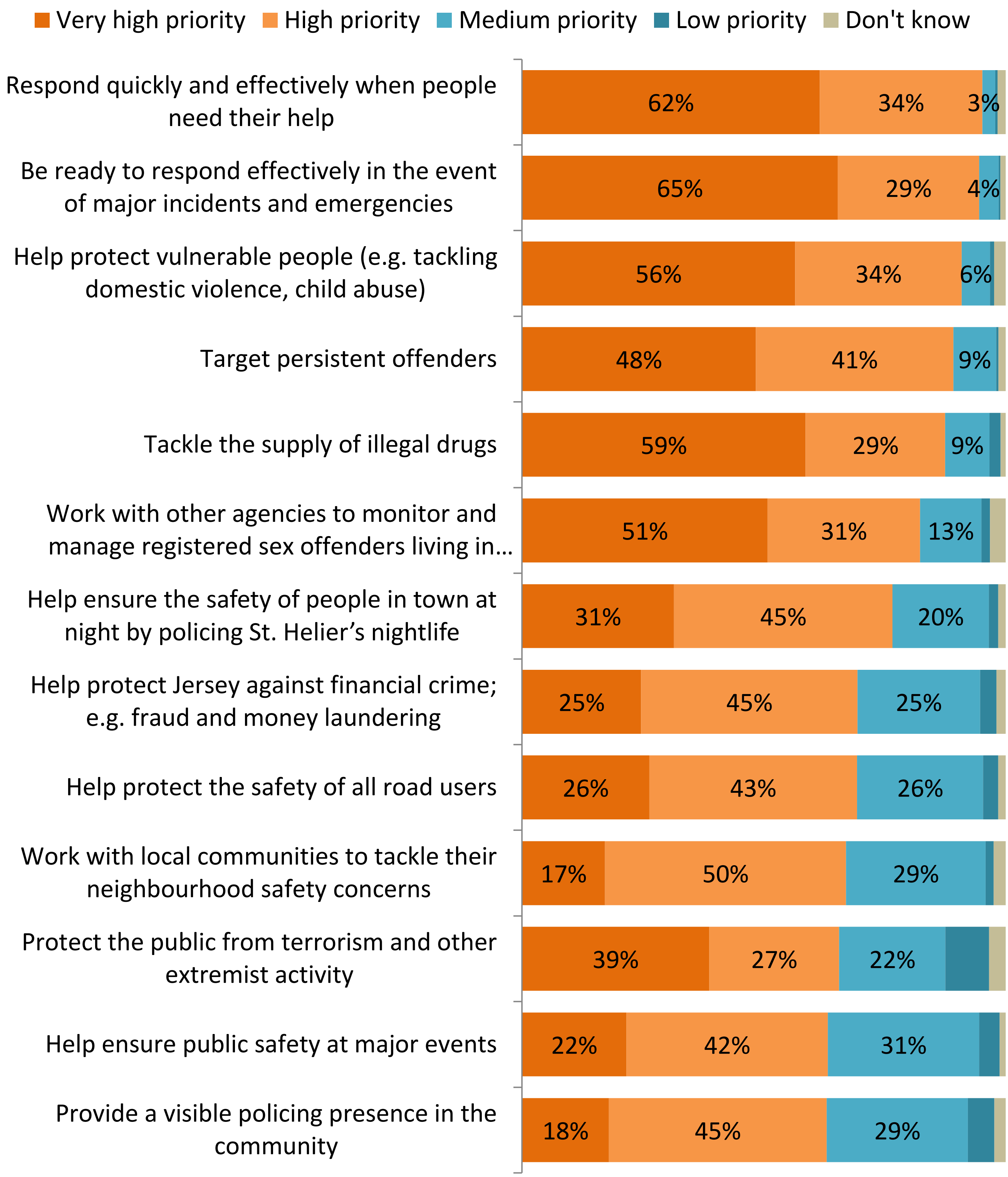
Respondents were asked how much they agreed or disagreed with three statements about the States of Jersey Police (see Table 6.1). The distribution of responses was not significantly different to that found in 2012. Two-thirds (66%) agreed at some level that the police were targeting the policing issues that matter most to the community. Four-fifths (80%) were confident that the police would do a good job if they were needed.

**Table 6.1 "How much do you agree or disagree with the following statements about the States of Jersey Police?"**

| | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | Don't know | **Total** |
|---|---|---|---|---|---|---|
| States of Jersey Police are targeting the policing issues that matter most to the community | 10 | 56 | 11 | 5 | 18 | **100** |
| States of Jersey Police do a good job of policing Jersey | 17 | 64 | 10 | 3 | 6 | **100** |
| I am confident that the police would do a good job if I needed them | 23 | 58 | 9 | 4 | 7 | **100** |

In terms of the priority level which residents felt the States of Jersey police should give to a range of policing activities, the two activities with the highest proportion who felt they should be given either a 'very high' or 'high' priority (at around 95%) were to 'respond quickly and effectively when people need their help' and to 'be ready to respond effectively in the event of major incidents and emergencies' (see Figure 6.3). The lowest priority was given to 'help ensure public safety at major events' and 'provide a visible policing presence in the community', although there were still more than three-fifths (63%) of people who gave these objectives either a 'high' or 'very high' priority.

**Figure 6.3 "The States of Jersey Police are currently focussing on the following objectives. What priority level do you consider each of these objectives to have?"**



## Play equipment in parks

Although large numbers reported not using play equipment in each of the parks listed, of those who did, high proportions rated the quality of the play equipment provided in each park as either 'good' or 'very good', from nearly three-quarters (72%) rating those at Longbeach, Gorey to be either 'good' or 'very good', up to over nine in ten (96%) who considered the junior equipment at Millbrook to be 'good' or 'very good' (see Table 7.1).

**Table 7.1 "How would you rate the quality of play equipment provided in the following locations?"**

| | | Percent of respondents, excluding those who 'don't use' | | | |
|---|---|---|---|---|---|
| | *Don't use* | Very good | Good | Poor | Very poor |
| Howard Davis Park | *72* | 19 | 56 | 22 | 2 |
| Toddler equipment at Millbrook (Coronation) park | *67* | 42 | 52 | 5 | 1 |
| Junior equipment at Millbrook (Coronation) park | *67* | 46 | 50 | 4 | 0 |
| Play equipment at Longbeach, Gorey | *77* | 12 | 60 | 26 | 3 |
| Toddler equipment at the Town ('Millennium') park | *73* | 33 | 52 | 11 | 5 |
| Junior equipment at the Town ('Millennium') park | *72* | 37 | 55 | 6 | 2 |

## Cleanliness of various facilities

Although three-fifths (63%) of adults rated the cleanliness of public toilets in Jersey to be 'good' or 'very good', higher proportions rated the cleanliness of other facilities listed, from 80% rating the cleanliness of car parks to be 'good' or 'very good', to around nine in ten giving a similarly positive rating to the cleanliness of roads and pavements, the main and fish market and promenades in Jersey (see Table 7.2).

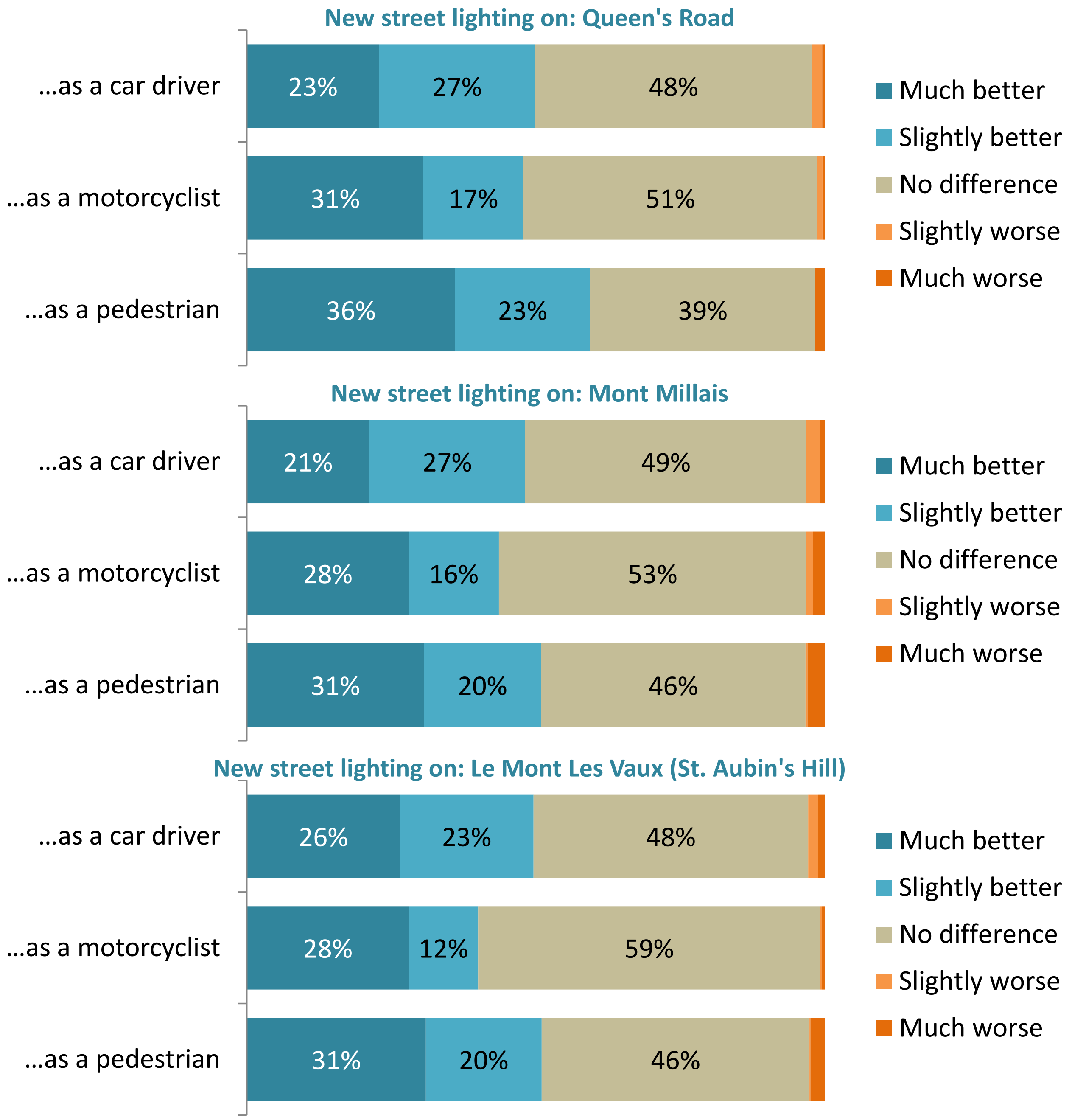
**Table 7.2 "How would you rate the following in Jersey?"**

| | Very good | Good | Poor | Very poor | Don't know | **Total** |
|---|---|---|---|---|---|---|
| Cleanliness of roads and pavements | 24 | 67 | 8 | 1 | 0 | **100** |
| Cleanliness of car parks | 15 | 65 | 13 | 1 | 6 | **100** |
| Cleanliness of public toilets | 11 | 52 | 21 | 5 | 10 | **100** |
| Cleanliness of main and fish market in town | 27 | 65 | 2 | 0 | 5 | **100** |
| Cleanliness of promenades | 22 | 71 | 3 | 0 | 4 | **100** |
| Cleanliness of beaches | 19 | 66 | 11 | 1 | 2 | **100** |
| Cleanliness of piers and areas around the harbour buildings | 13 | 66 | 9 | 1 | 10 | **100** |

## Street lighting

New street lighting was put in place in three areas in Jersey during 2013: on Queen's road, Mont Millais and Le Mont Les Vaux. JASS 2014 asked residents to rate the difference the new lighting had made to them, as pedestrians, motorcyclists or car drivers. Ratings in Figure 7.1 exclude those who identified that the question was not applicable to them[1], and shows that around half of those who provided a rating of the new street lighting were neutral, but that the majority of the remainder thought the lighting was 'slightly' or 'much' better.

**Figure 7.1 "How would you rate the difference new street lighting has made for you in each of the following areas, as a pedestrian, motorcyclist and as a car driver?"**




[1] In particular, over four-fifths identified that being asked to rate the difference the street lighting had made to them 'as a motorcyclist' was not applicable to them; around three-quarters identified that being asked to rate the difference the street lighting had made to them 'as a pedestrian' was not applicable to them; around half of respondents identified that being asked to rate the difference the street lighting had made to them 'as a car driver' was not applicable to them.

## Closure of Victoria Avenue

The Transport and Technical Services department has typically been asked for permission to close Victoria Avenue five times a year for events in recent years. Nearly nine in ten (87%) adults felt that this current number of closures was either 'quite' or 'very' acceptable, one in ten (10%) thought it was 'not very' acceptable, and a small proportion (3%) that it was 'not at all' acceptable.

In terms of whether people would find additional closures of Victoria Avenue acceptable, around four-fifths (84%) felt that closing it for one additional day each year for events would be either 'very' or 'quite' acceptable, and seven in ten (71%) felt that closing it for two additional days each year for events would be acceptable at some level (see Table 7.3 for full results).

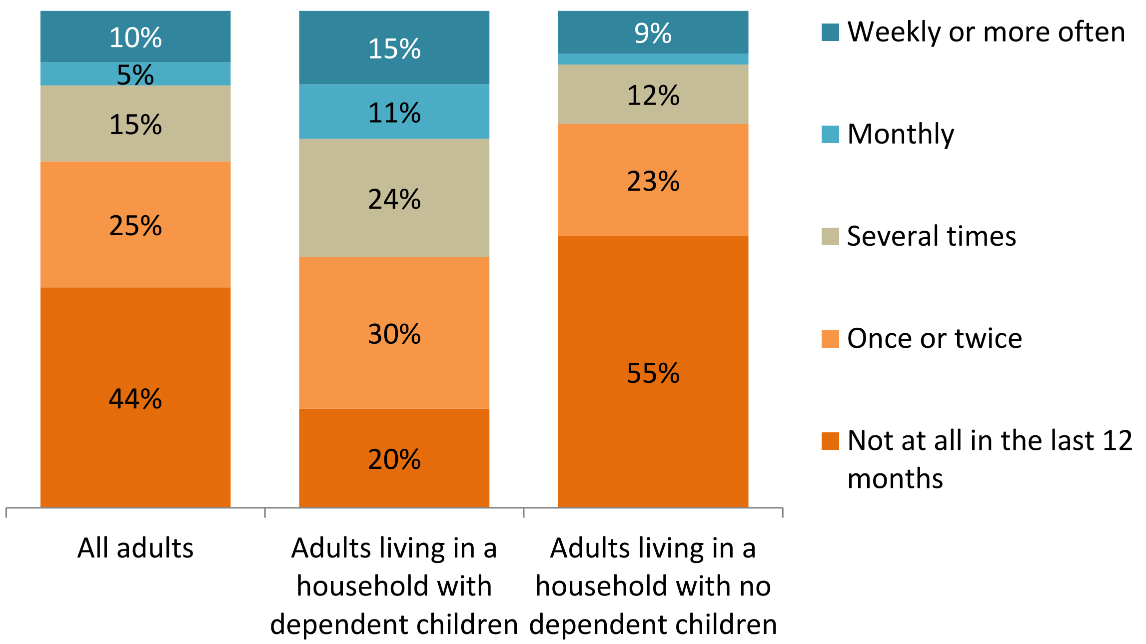
**Table 7.3 Acceptability of road closures of Victoria Avenue for events**

| | Very acceptable | Quite acceptable | Not very acceptable | Not at all acceptable | **Total** |
|---|---|---|---|---|---|
| How acceptable are the current numbers of road closures of Victoria Avenue for events? | 34 | 53 | 10 | 3 | **100** |
| How acceptable would closing Victoria Avenue for 1 additional day each year for events be? | 33 | 51 | 11 | 5 | **100** |
| How acceptable would closing Victoria Avenue for 2 additional days each year for events be? | 28 | 43 | 19 | 10 | **100** |

## Fort Regent

Over two-fifths of adults (44%) had not visited Fort Regent in the previous 12 months. A quarter (25%) had visited just once or twice in the preceding 12 months, and around one in six (15%) visited the Fort monthly or more often over the previous year.

**Figure 7.2 "Approximately how often have you been to Fort Regent in the last 12 months?"**



Adults with children in their household were more likely to have visited the Fort monthly or more frequently over the previous year – a quarter (26%) of such households did so, compared to just one in ten (11%) of adults living in households without dependent children.

One in eight (12%) adults reported holding an 'Active card', and around half of this group (47%) visited the Fort at least monthly during the previous year.

As Table 7.4 shows two-fifths (40%) of residents who visited the Fort in the previous year had gone to watch a performance by a band, musician or comedian. Three out of ten (29%) had attended the gym and/or fitness classes. Overall, around half of adults who had visited the Fort had used facilities for children (play areas, sports classes or other activities).

**Table 7.4 "In the last 12 months which of the following facilities have you used at Fort Regent?"**

| | Percent (of those who had visited the Fort in previous year) |
|---|---|
| Performances by bands, musicians, comedians | 40 |
| Indoor children's play areas | 33 |
| Gym and/or fitness classes | 29 |
| Adult sports facilities (e.g. basketball, indoor football, squash, bowls) | 23 |
| Children's sports classes & facilities (e.g. gymnastics, karate, trampolines, basketball, netball, badminton) | 11 |
| Other children's activities or services (including music services) | 10 |

The majority of adults who used the facilities at Fort Regent travelled there by car (78%); most of the remainder went on foot (20%).

# 8 - Travel to work

Methods of travelling to work have not changed significantly over the past 5 years (see Table 8.1), with over half (55%) of people using the car to get to work.

**Table 8.1 "How do you usually travel to work, the majority of the time?" Excluding those who work from home or live at place at work**

| | JASS 2009 | JASS 2010 | Census 2011 | JASS 2013 | JASS 2014 |
|---|---|---|---|---|---|
| Car or van on my own | 43 | 43 | 43 | 46 | 45 |
| Car or van with other people | 13 | 14 | 17 | 11 | 10 |
| Walk | 28 | 26 | 27 | 28 | 32 |
| Cycle | 7 | 8 | 4 | 5 | 5 |
| Motorbike / moped | 5 | 4 | 4 | 4 | 3 |
| Bus | 3 | 5 | 5 | 5 | 4 |
| Taxi | 1 | ~ | ~ | ~ | ~ |
| **Total** | **100** | **100** | **100** | **100** | **100** |

Focussing on those who travelled to work by car or van, half (51%) 'never' used one of three alternative methods of transport to get to work, a proportion unchanged from 2013. Table 8.2 shows that of those who travel to work by car or van, nearly one in five (18%) 'occasionally' walk to work, around one in six 'occasionally' cycle, and one in eight 'occasionally' take the bus to work.

**Table 8.2 "How often do you use any of these other ways to travel to work as the longest part of your journey?" (Just those who usually travel to work by car or van)**

| | 2 or more times a week | Once a week | At least once a month | Occasionally | Never | **Total** |
|---|---|---|---|---|---|---|
| Walking | 6 | 3 | 1 | 16 | 74 | **100** |
| Cycling | 1 | 2 | 2 | 15 | 80 | **100** |
| Bus | 2 | 0 | 3 | 17 | 78 | **100** |

## Rating your journey experience

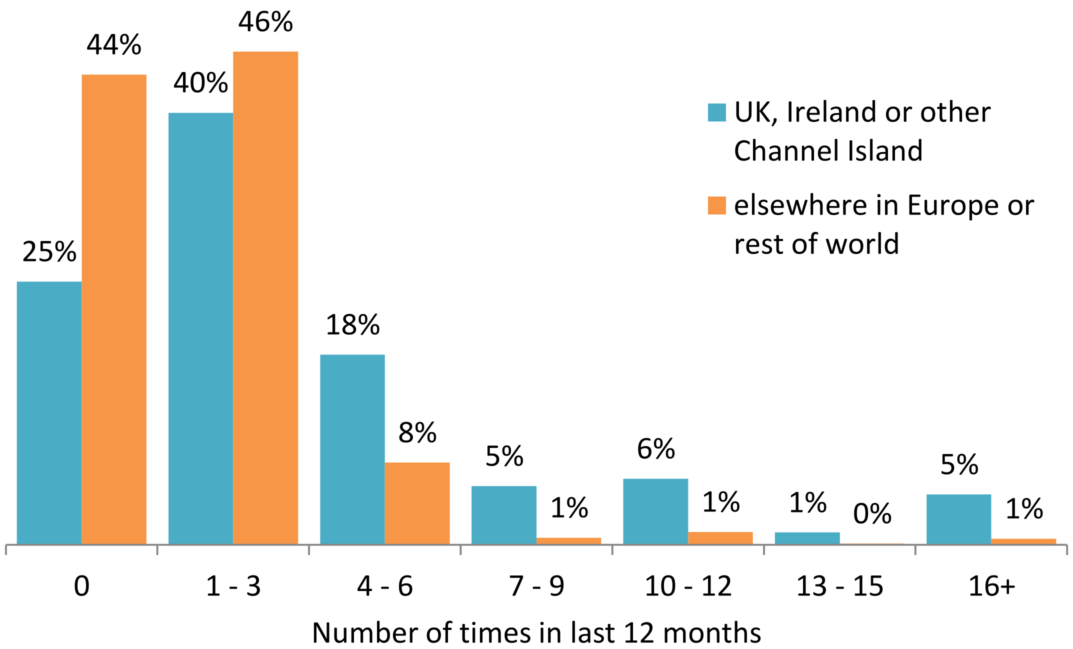
Over nine in ten (96%) of adults rated their journey experience through Jersey Airport over the previous 12 months to be either 'very good' (39%) or 'good' (57%).

## Airport trips

A quarter (25%) of adults reported not travelling to visit the UK, Ireland or other Channel Islands by plane over the previous 12 months. Two-fifths (40%) had flown between 1 and 3 times to these destinations. One in twenty (5%) had flown to these destinations from Jersey airport more than 15 times in the previous year (see Figure 9.1).

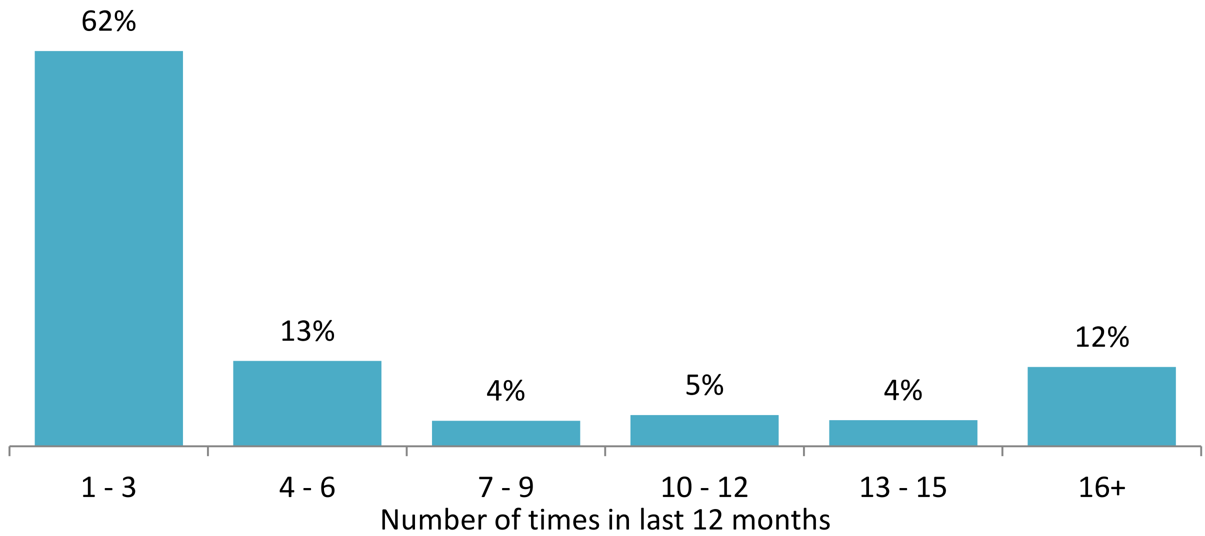
Over two-fifths (44%) had not flown out of Jersey Airport to visit elsewhere in Europe or the rest of the world from Jersey Airport in the previous year, and a similar proportion had flown to visit Europe or the rest of the world between 1 and 3 times.

**Figure 9.1 "In the last 12 months, how many times have you flown out of Jersey Airport to visit a) the UK, Ireland, or other Channel Island and b) elsewhere in Europe or rest of the world?"**




Three-quarters of adults had not flown out of Jersey Airport in the previous 12 months for a business trip. For those that did, three-fifths (62%) did so between 1 and 3 times. At the other end of the spectrum, one in eight (12%) flew out of Jersey Airport 16 or more times in the preceding 12 months on business (see Figure 9.2).

**Figure 9.2 "How many of all the times that you have flown out of Jersey Airport over the last 12 months were for a business trip?" (excluding those who did not fly out of Jersey Airport for a business trip)**




Nearly a fifth (18%) of adults had not flown out of Jersey Airport over the preceding 12 months. On average (median), residents took 3 trips out of Jersey Airport over the previous 12 months (whether for business or leisure).

## Getting to Jersey airport

Nearly three-quarters of people (74%) used a 'lift from friends or relatives' to get to Jersey Airport when flying out of the airport, whilst two-fifths (42%) reported having taken a taxi. Table 9.1 shows the full results - respondents were asked to tick all that applied to them over the previous 12 months.

**Table 9.1 "In the last 12 months, which of the following ways have you used to get to Jersey Airport when flying out of the airport?"** *(Respondents were able to tick more than one option)*

| | Percent |
|---|---|
| Taxi | 42 |
| Own vehicle (and parked at the airport) | 26 |
| Bus | 18 |
| Lift from friends or relatives | 74 |

Looking at ways of getting to the airport by type of user, and grouping people into 'low' (1 to 3 trips in the previous 12 months), 'medium' (4 to 12 trips over the year) and 'high' (more than 12 trips in the previous year) showed some differences in the ways people travelled to Jersey Airport (see Table 9.2).

'High' frequency fliers were more likely to take their own vehicle to the airport than those who were 'low' frequency fliers, who were more likely to use a lift from friends or relatives to get to the airport.

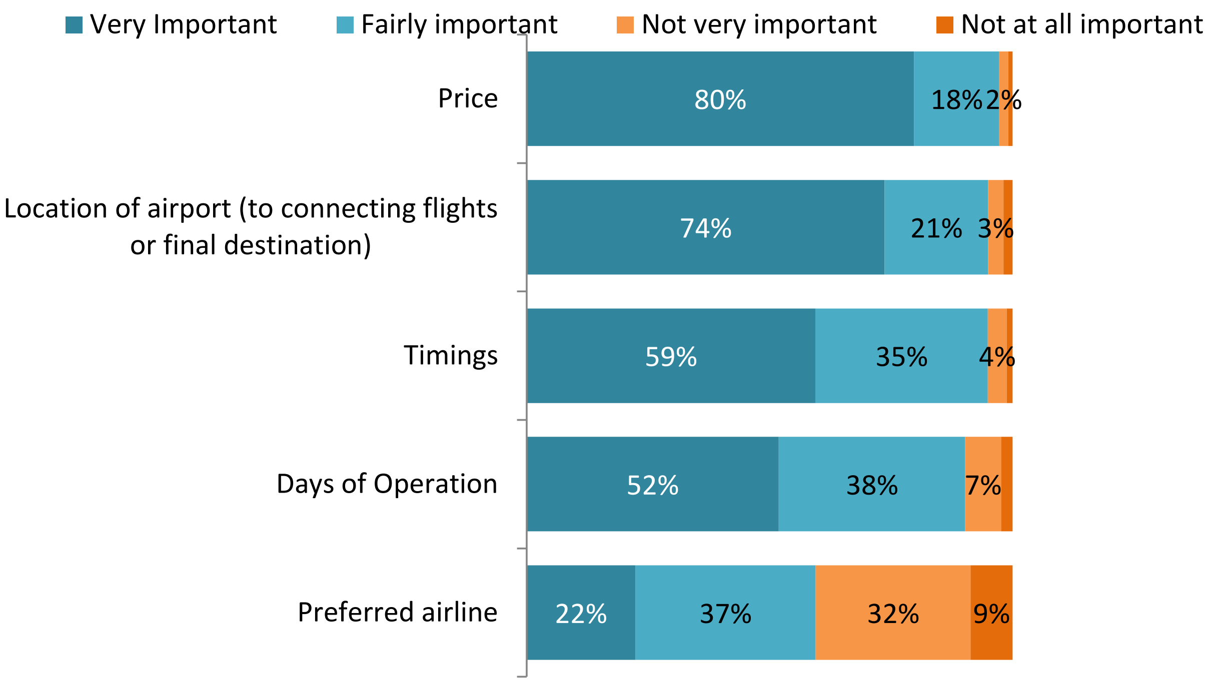
**Table 9.2 "In the last 12 months, which of the following ways have you used to get to Jersey Airport when flying out of the airport?" Percent of each group using each method of transport**

| *(Respondents were able to tick more than one option)* | **Low** frequency flier (1 to 3 trips) | **Medium** frequency flier (4 to 12 trips) | **High** frequency flier (over 12 trips) |
|---|---|---|---|
| Taxi | 31 | 54 | 57 |
| Own vehicle (and parked at the airport) | 11 | 42 | 72 |
| Bus | 16 | 23 | 11 |
| Lift from friends or relatives | 75 | 79 | 61 |

## Important factors when choosing a flight

Price was the most frequently identified factor (by four-fifths, 80%) as 'very important' when deciding to book a particular flight out of Jersey Airport. The next most important factor identified was 'location of airport to connecting flights or final destination'. The lowest proportion (less than a quarter, 22%) identified 'preferred airline' as 'very important' when booking a particular flight out of Jersey Airport. See Figure 9.3 for the full results.

**Figure 9.3 "How important are each of the following factors when deciding to book a particular flight out of Jersey Airport?"**



## Rating your journey experience by ferry

Nine in ten adults (90%) rated their journey experience through the ferry terminal over the previous 12 months to be either ‘very good’ (22%) or ‘good’ (68%). These proportions for people’s experience through the ferry terminal are slightly lower than the ratings given to the journey experience through Jersey Airport.

## Ferry trips

Two-fifths of adults (41%) had not taken the ferry, either to France or the UK, in the previous 12 months. A quarter (25%) had taken the ferry just once in the previous year. One in eight (13%) had been on four or more trips over the previous 12 month period (see Table 10.1).

**Table 10.1 “In the last 12 months, how many times have you taken the ferry?”**

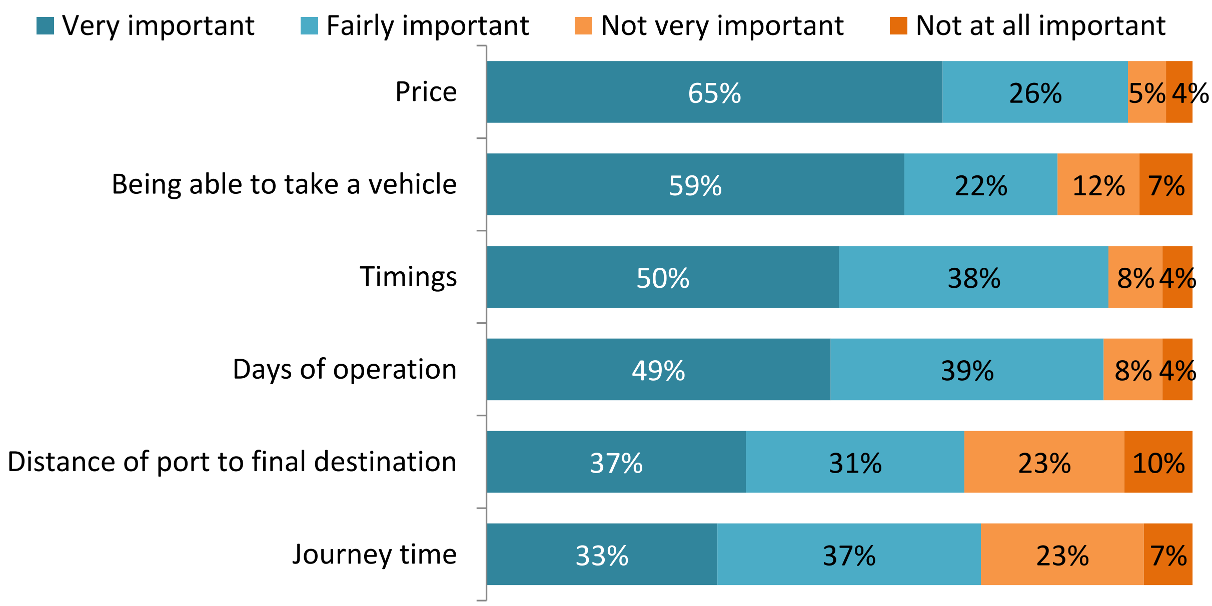
| Number of ferry trips in the previous 12 months | to France | to UK | Total trips (both UK and France) |
|---|---|---|---|
| 0 | 55 | 70 | 41 |
| 1 | 23 | 20 | 25 |
| 2 | 12 | 6 | 15 |
| 3 | 4 | 2 | 7 |
| 4+ | 7 | 2 | 13 |

On three-fifths (58%) of all ferry trips (regardless of destination), people took their vehicle with them, rather than being just foot passengers.

## Important factors when deciding to travel by ferry

Figure 10.1 lists different factors which might be considered important when deciding to travel by ferry rather than plane. Being able to take a vehicle was rated as ‘fairly’ or ‘very’ important by four-fifths (81%) of ferry travellers. Slightly higher proportions identified the timings, days of operation and price to be either ‘fairly’ or ‘very’ important factors.

**Figure 10.1 “How important are each of the following factors when you decide to travel by ferry rather than plane from Jersey?”**



## Energy bills

Nine in ten residents (93%) reported actively trying to save energy at home or work. For the small proportion who did not, the most commonly cited reasons were 'habit' and 'it's not something I've thought about'. One in ten of those who did not actively try to save energy at home or work said they 'didn't know how'.

Over four-fifths (85%) of households reported having at least some idea of how much they spent on a monthly basis to heat their home – around a sixth (15%) said they had no idea. Not knowing was a particular issue for those living in non-qualified accommodation, which would include staff or service accommodation; a third (31%) of this group said they had no idea how much they spent on a monthly basis to heat their home.

For those who used oil to heat their home, three-quarters (76%) reported not shopping around for the best price before ordering oil but instead always used the same supplier. Less than one in ten (8%) said they 'always' shopped around for the best price.

One in five (22%) of those for whom it was applicable did not understand how their electricity bill was calculated for their household, whilst a slightly higher proportion (30%) did not understand how their gas bill was calculated. There was a slight age dependence whereby the youngest age group (16-34 year olds) had the highest proportion reporting that they did <u>not</u> understand how these energy bills were calculated for their household. This may in part be due to the result that for those living in bedsits, nearly half said they did not know how their electricity bill was calculated (47%) and four-fifths (80%) how their gas bill was calculated. For this group, it may be that they are perhaps more likely to be paying their energy bills indirectly through the landlord than directly receiving a bill from the utility company.

## Home improvements

Four-fifths (78%) of adults for whom it was relevant (i.e. they pay the bills and own where they live) said they would consider making home improvements to reduce their fuel bills. Table 11.1 shows the range of payments that they would be willing to spend as a one-off payment in order to save £50 a year off their fuel bills.

**Table 11.1 "What is the maximum you would be prepared to spend as a one-off payment in order to save £50 each year off your fuel bills?"**

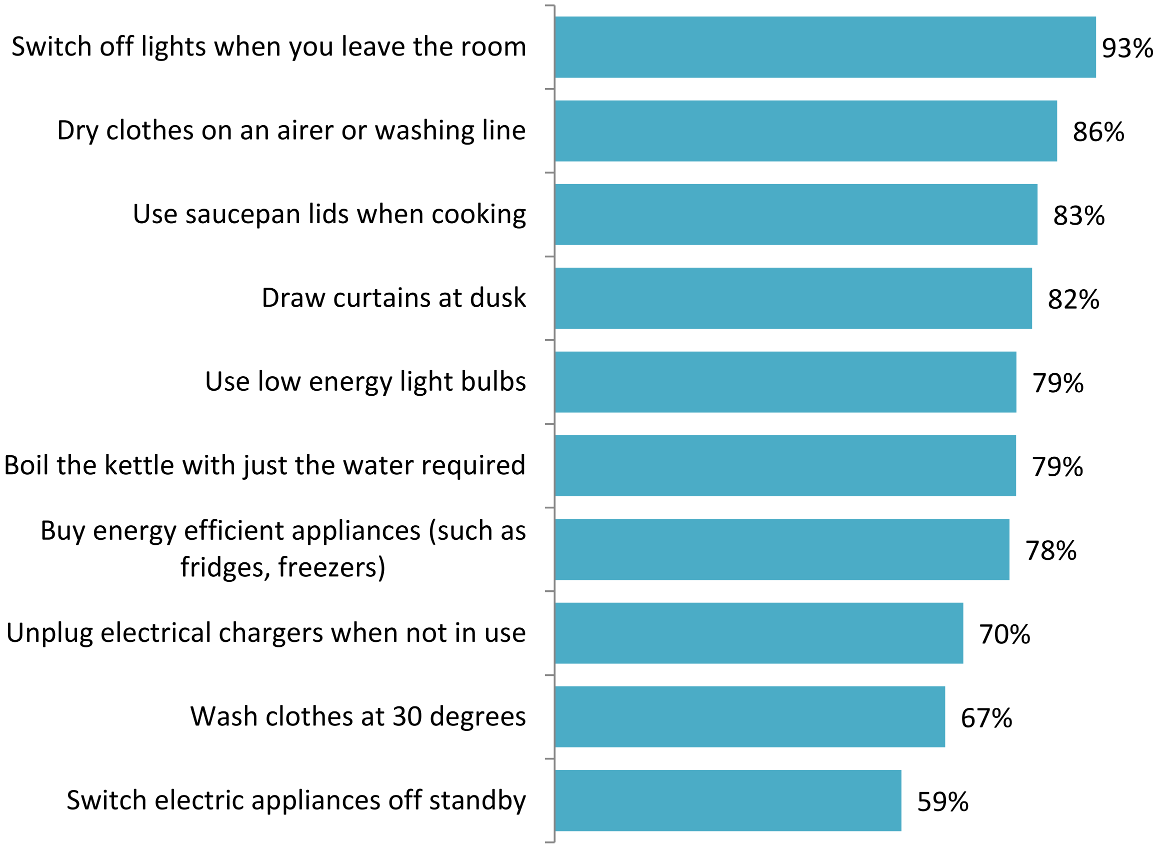
| | Percent |
|---|---|
| Less than £50 | 14 |
| Between £50 and £99 | 18 |
| Between £100 and £199 | 22 |
| Between £200 and £299 | 16 |
| £300 or more | 30 |

Nearly a third (30%) would be prepared to spend £300 or more as a one-off payment in order to save money, ranging from one in seven (14%) households with a total annual household income of less than £15,000 to half (51%) of households with a total annual household income of £95,000 or more.

## Saving energy

A number of ways of saving energy were presented to respondents, such as 'Draw curtains at dusk' and 'Use low energy light bulbs'. The proportion of adults who implemented each way of saving energy is presented in Figure 11.1, over nine in ten (93%) switch off lights when they left a room and over nine in ten people (95%) reported carrying out at least five of the listed means of saving energy.

**Figure 11.1 "Do you do any of the following at home?"**




A quarter of adults (25%) would consider paying someone to visit their home to provide advice on saving energy and money on their fuel bills. One in twenty (5%) reported having a smart meter (a device that records how much electricity is being used throughout the day), and an additional two-thirds (66%) reported that they would consider such a device to identify how to save energy and money on their fuel bills.

Although a third (32%) of people were unsure which one of a list of improvements would be the most feasible for their home, a fifth (19%) identified that draught proofing windows and doors would be the most feasible. One in eight (13%) felt that, of the list provided, 'installing solar panels or wind turbines' would be the most feasible home improvement. Table 11.2 provides the full list of options.

**Table 11.2 "Which one of the following improvements do you think would be the most feasible for your home?"**

| | Percent |
|---|---|
| Fitting or upgrading loft insulation | 10 |
| Having solid or cavity wall insulation | 10 |
| Replacing your boiler with a more efficient one | 9 |
| Draught proofing windows and doors | 19 |
| Installing more timers and thermostats to control your heating and hot water | 6 |
| Installing solar panels or wind turbines | 13 |
| Not sure | 32 |

## Access to the internet

Overall, nine out of ten adults (91%) had access to the internet; 89% of adults could access it at home and 86% of workers could access the internet at work. Although more than nine out of ten people aged 16-64 years had access to the internet (at home or at work), only two-thirds (65%) of adults aged 65 years or over did.

Table 12.1 lists different uses of the internet and the proportion of adults who ticked that they used the internet for that purpose. Respondents were able to tick all that applied to them. Nine in ten (92%) used the internet to browse for information, news and events, and for email.

Over four-fifths (85%) reported using the internet to buy goods or services online.

**Table 12.1 Which of the following do you use the internet for?, by age**

| | 16-34 years | 35-44 years | 45-54 years | 55-64 years | 65 years or over | **All ages** |
|---|---|---|---|---|---|---|
| Browsing for information, news and events | 96 | 95 | 94 | 91 | 76 | **92** |
| Email | 95 | 95 | 91 | 91 | 81 | **92** |
| Buying goods and services | 93 | 86 | 89 | 84 | 65 | **85** |
| Using social media (e.g. Twitter, Facebook, Ask FM, Instagram) | 92 | 79 | 56 | 42 | 19 | **65** |
| Finding information about public services provided by the States | 64 | 67 | 59 | 59 | 43 | **60** |
| Listening to, or downloading, music | 73 | 58 | 43 | 34 | 15 | **51** |
| Watching, or downloading, videos and films | 67 | 54 | 36 | 29 | 10 | **45** |

Some differences in patterns of internet use were noted by age group. For example nine out of ten adults aged 16-34 years (92%) reported using social media (such as Twitter, Facebook etc.), compared to two out of ten (19%) of those aged 65 years or over.

## Accessing television channels

Around half of households (54%) watched satellite TV with a monthly subscription on their primary TV set, and an additional 13% watched satellite TV without a monthly subscription. A quarter (28%) had Freeview TV as their primary TV, either using a set top box or a digital TV. Less than one in twenty households (3%) reported not watching TV in their home.

A third (32%) of households reported having only one TV. Of those who reported having more than one TV, two-fifths (43%) had a Freeview TV as an additional TV and a similar proportion (38%) had satellite TV with a monthly subscription.

Including both primary TV sets and additional TV sets in the household together, Table 12.2 shows the proportion of households with each type of TV.

**Table 12.2 "Which of the following applies to how you watch TV on any TV set in your household?"**
*NB more than one may apply to each household*

| | Percent of households |
|---|---|
| Through a satellite TV with a monthly subscription? (e.g. Sky) | 55 |
| Through a satellite TV without a monthly subscription (e.g. Freesat) | 19 |
| Through a Freeview TV (using a set top box or a digital TV) | 43 |

The Department of the Environment included a section of questions in JASS to inform the development of a Food Security Strategy for Jersey.

Although a small proportion (3%) of people were unsure how long it would be before their household ran out of food at home, if they did not shop for more food, the majority of people were able to indicate a length of time. A third of people (32%) judged that their household would run out of food in 'a few days', and a slightly higher proportion felt they would last 'about a week'. A fifth (18%) thought they would have enough food to last around two or three weeks, whilst less than one in twenty (3%) had enough food to last a month or more, and a similarly small proportion had enough for 'a day or less'.

The majority of people (85%) thought that the main supermarkets in Jersey would be able to keep their shelves stocked for about a week or less, if they suddenly didn't receive any deliveries from outside of Jersey. An additional 8% felt supermarkets would be able to keep their shelves stocked for 'around two or three weeks' under those circumstances (see Table 13.1).

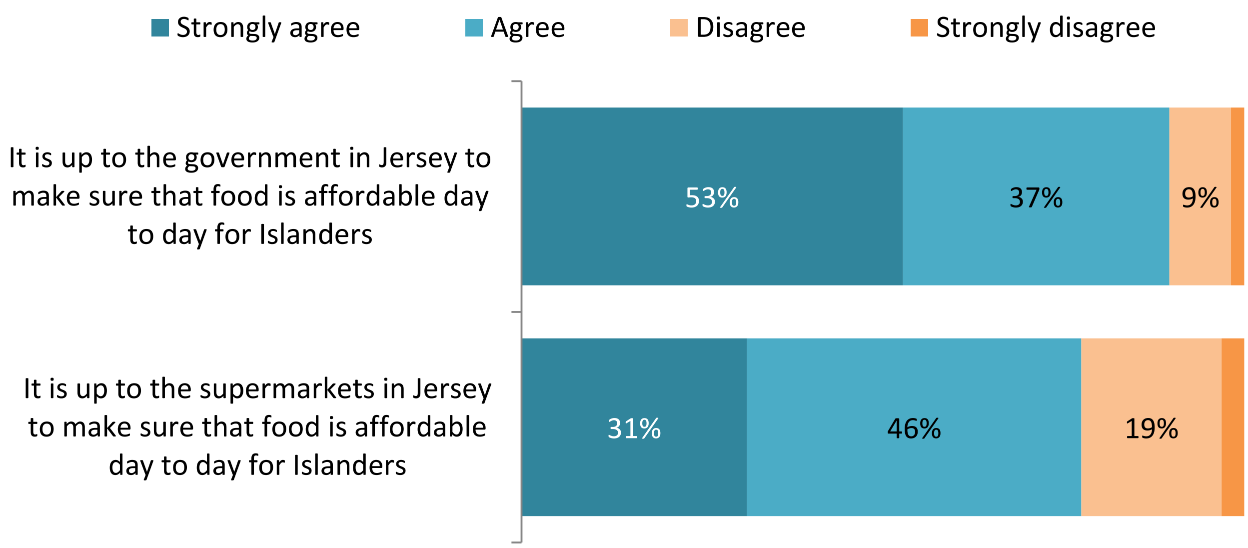
**Table 13.1 "How long do you think the main supermarkets in Jersey would be able to keep their shelves stocked if they suddenly didn't receive any deliveries from outside of Jersey?"**

| | Percent |
|---|---|
| A day or less | 8 |
| A few days | 54 |
| About a week | 24 |
| Around two or three weeks | 8 |
| A month or more | 2 |
| Not sure | 6 |

## Food affordability

In terms of where people felt the responsibility for making sure food is *affordable* should lie, there were higher proportions agreeing at some level that it is up to the government to make sure food is affordable (90%), compared to those who agreed at some level that it was up to the supermarkets to make sure food is affordable (77%).

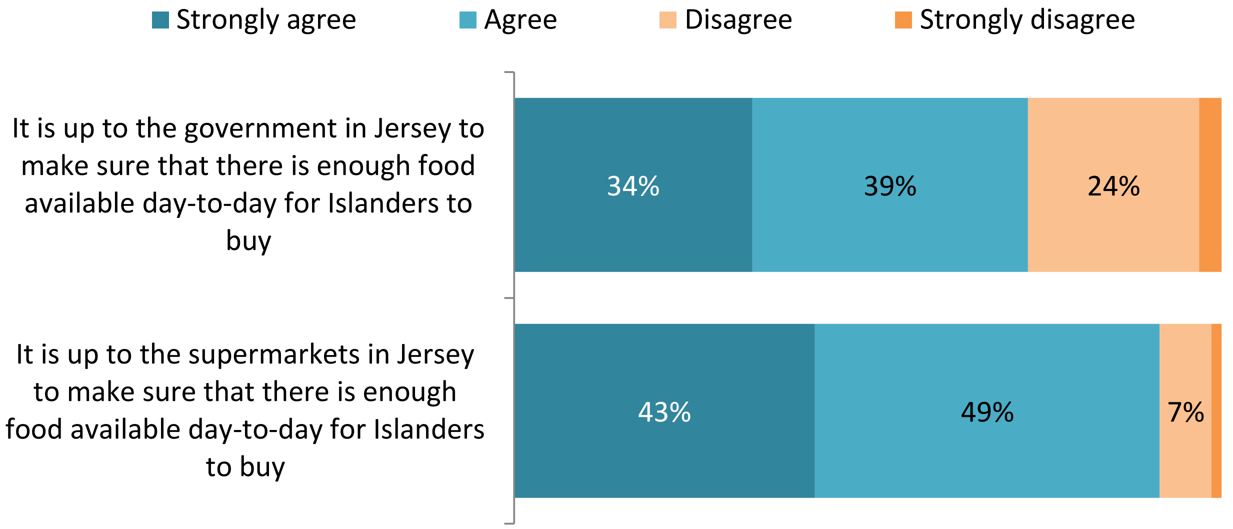
**Figure 13.1 "How much do you agree or disagree with the following statements?"**



## Food availability

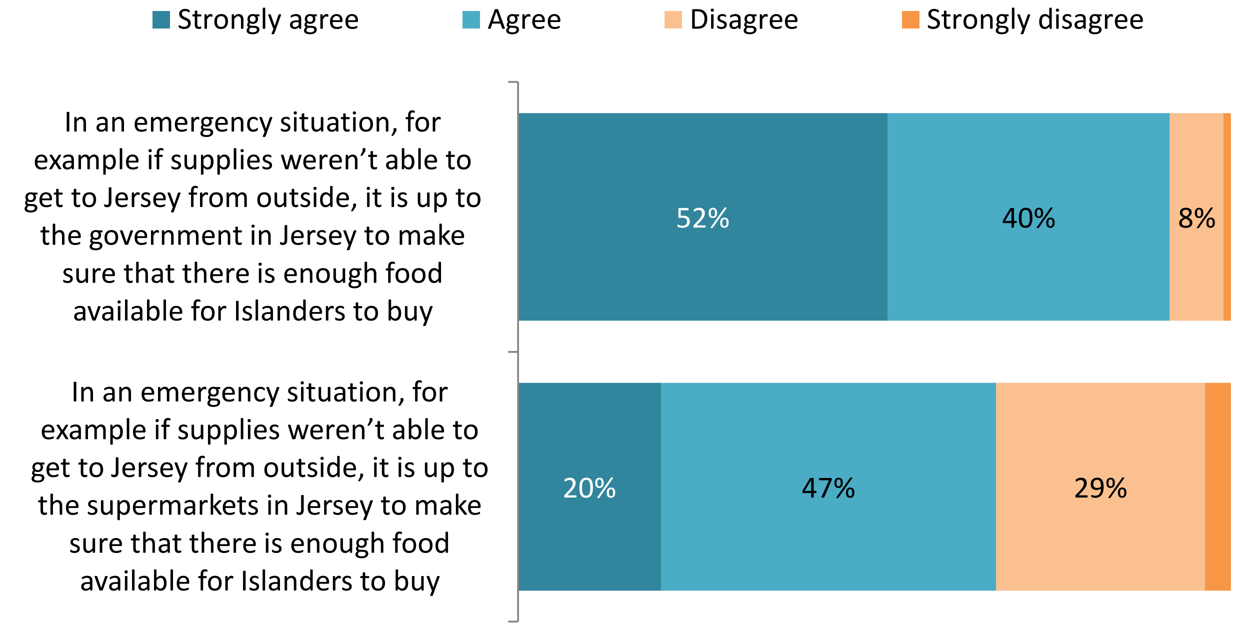
In terms of where residents felt the responsibility should lie for making sure food is *available* for Islanders day to day, a higher proportion felt that this was up to the supermarkets in Jersey (91%) compared to those who agreed it was up to the government (73%) – see Figure 13.2.

**Figure 13.2 "How much do you agree or disagree with the following statements?"**




In an emergency situation, for example if supplies weren't able to get to Jersey from outside, more people agreed that it would be up to the government to make sure there was enough food available for Islanders to buy – see Figure 13.3.

**Figure 13.3 "How much do you agree or disagree with the following statements?"**



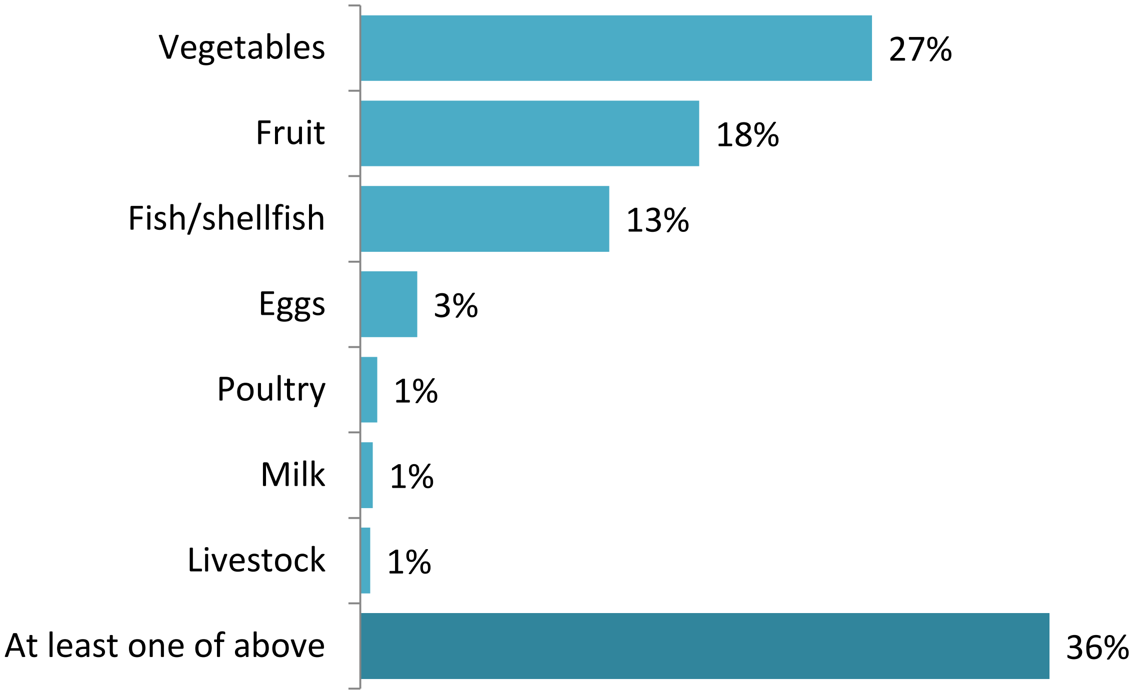

In an emergency situation, three-fifths (59%) of residents thought that the government in Jersey should have a stockpile of non-perishable foods for Islanders to buy. When asked how long they felt this supply should last for, a range of opinions were given from one in ten (9%) saying up to a few days, a third (33%) suggesting 'about a week', and around a quarter suggesting 'around two or three weeks' (25%) or 'a month or more' (27%).

## Producing food in Jersey

Few people (5%) felt that all the food needed to feed Jersey residents should be grown on Jersey rather than imported, although half (50%) thought that 'most' of the food needed should be grown in Jersey, with some imports for variety. Two-fifths (39%) thought that 'some' of the food should be grown on the Island, with most being imported. Less than 1% felt that 'none' of the food needed should be grown in Jersey.

A quarter of households (27%) in Jersey reported growing their own vegetables and about a fifth (18%) grew their own fruit. One in eight (13%) fished (including for shellfish) for their own consumption. Much smaller proportions of households (around one in a hundred) kept animals for their eggs, meat or milk.

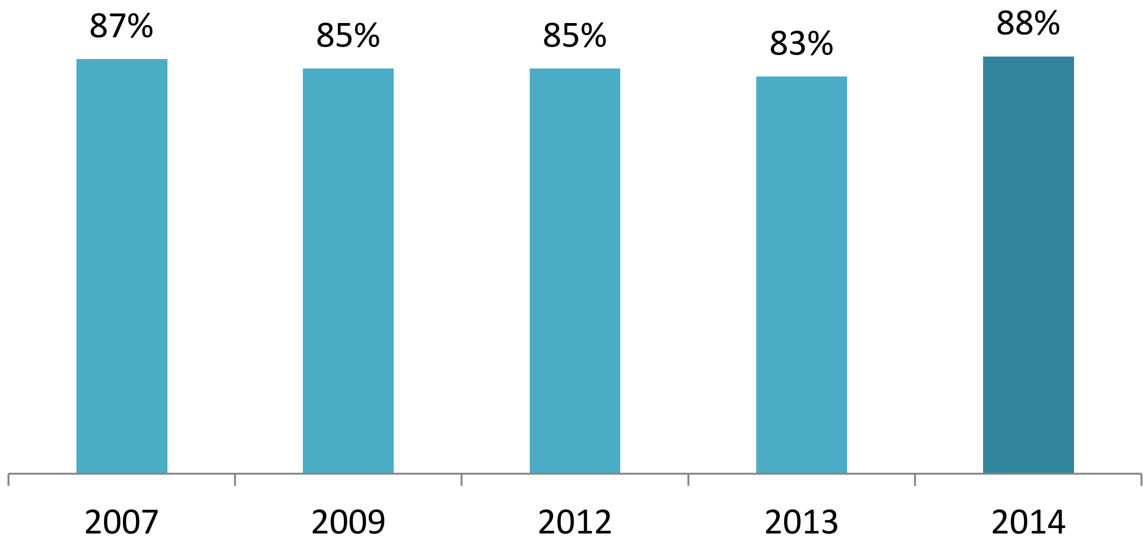
**Figure 13.4 "Does your household grow or catch any of the following food for your own consumption?"**



## General health

Nearly nine out of ten adults rated their health as 'good', 'very good' or 'excellent'. Figure 14.1 shows this proportion over recent years.

**Figure 14.1 In general, how would you rate your health? Proportion of adults who responded 'Good', 'Very good' or 'Excellent', by year**




## Smoking

The proportion of people who smoke in Jersey was not found to have changed significantly for a number of years (see Table 14.1), with one in six (16%) adults smoking daily, and an additional 6% smoking occasionally but not every day.

**Table 14.1 Proportion of residents who smoke, by year**

| | 2010 | 2012 | 2013 | 2014 |
|---|---|---|---|---|
| I have never smoked / I don't smoke | 47 | 46 | 44 | 48 |
| I used to smoke occasionally but don't now | 13 | 15 | 15 | 15 |
| I used to smoke daily but don't now | 17 | 17 | 18 | 19 |
| I smoke occasionally but not everyday | 8 | 6 | 6 | 5 |
| I smoke daily | 15 | 16 | 16 | 14 |

The average number of cigarettes smoked each day by female daily smokers has reduced slightly from 13 per day in 2012 to 11 per day on average (mean) in 2014, whilst the number smoked by men each day has remained essentially the same over the same time period.

**Table 14.2 Number of cigarettes smoked per day (average, daily smokers only)**

| | 2008 | 2010 | 2012 | 2014 |
|---|---|---|---|---|
| Men | 16 | 17 | 15 | 15 |
| Women | 13 | 14 | 13 | 11 |
| All daily smokers | 14 | 16 | 14 | 13 |

A wider question found that one in eight households (13%) had someone who smoked regularly in the home. Looking at households by whether or not they had children either living in the household, or whether someone in the household regularly looked after children in the home (for example grandchildren or unrelated children) showed that one in ten of such households (10%) *also* had someone who regularly smoked inside the home (see Table 14.3).

**Table 14.3 Proportion of households containing a smoker, by households with children living or being looked after in the home**

| | | Are there children in the home, or does someone in the household regularly look after children in the home? | | |
|---|---|---|---|---|
| | | **Yes** | **No** | **All households** |
| **Does anyone in the household smoke?** | Yes | 10 | 14 | 13 |
| | No | 90 | 86 | 87 |
| **All households** | | **100** | **100** | **100** |

## E-cigarettes

E-cigarettes are battery powered vaporizers which simulate tobacco smoking by heating a liquid solution to produce nicotine and water vapour. Less than one in twenty (4%) adults had never heard of 'e-cigs', and an additional four-fifths (83%) had heard of them but never used them. Just one in twenty (4%) used them at least once a month.

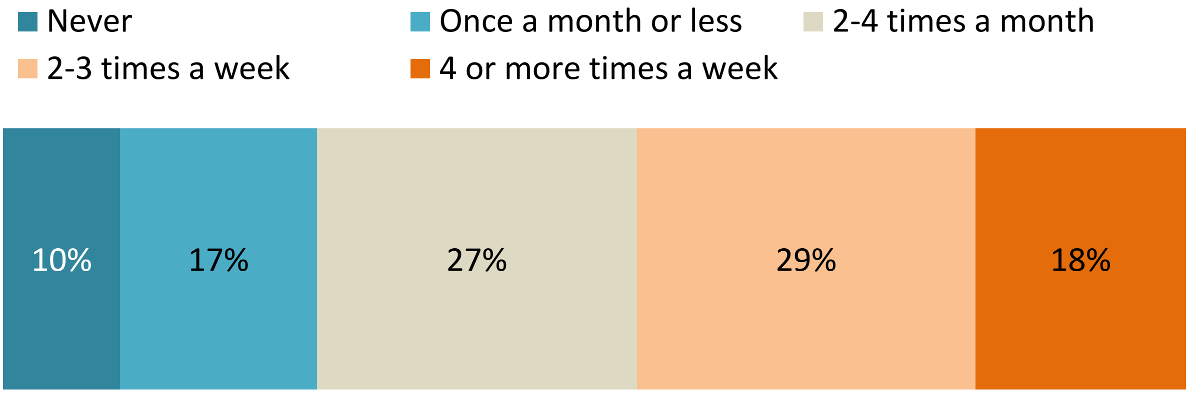
## Quitting smoking

Of those who smoke at least occasionally, two-thirds (67%) said they had wanted to quit in the last year, and nearly three-quarters (72%) had heard of the Help2Quit pharmacy service.

## Drinking

Nearly a fifth (18%) of adults reported drinking alcohol 4 or more times a week. An additional 29% drank alcohol 2-3 times a week (see Figure 14.2).

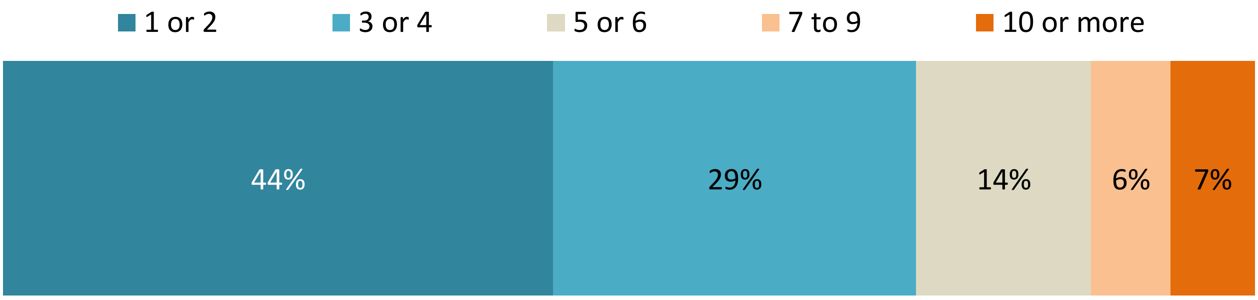
**Figure 14.2 "How often do you have a drink containing alcohol?"**




In terms of how many standard drinks[2] adults tend to drink on a typical day when they are drinking, over one in twenty (7%) reported drinking 10 or more.

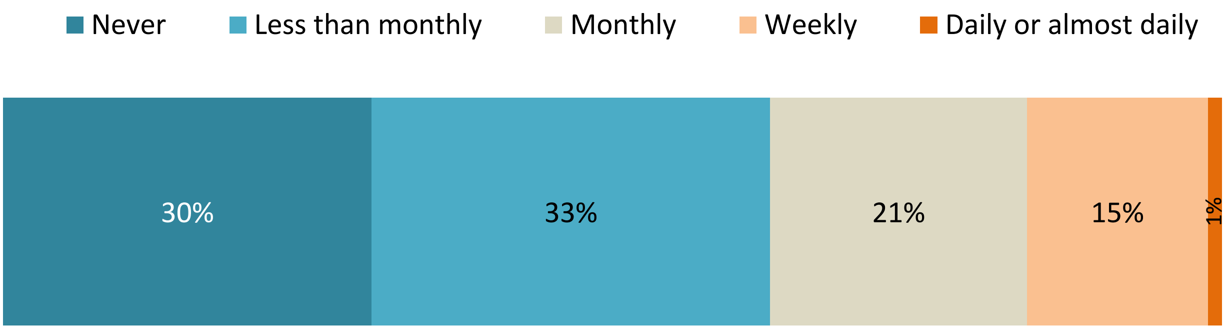
[2] A standard drink was described as half a pint of ordinary strength beer, or a small glass of wine. A standard glass of wine, a pint of ordinary strength beer, or half a pint of extra strength beer, was described as counting as 2 'standard alcoholic drinks'

**Figure 14.3 "How many standard alcoholic drinks do you have on a typical day when you are drinking?"**



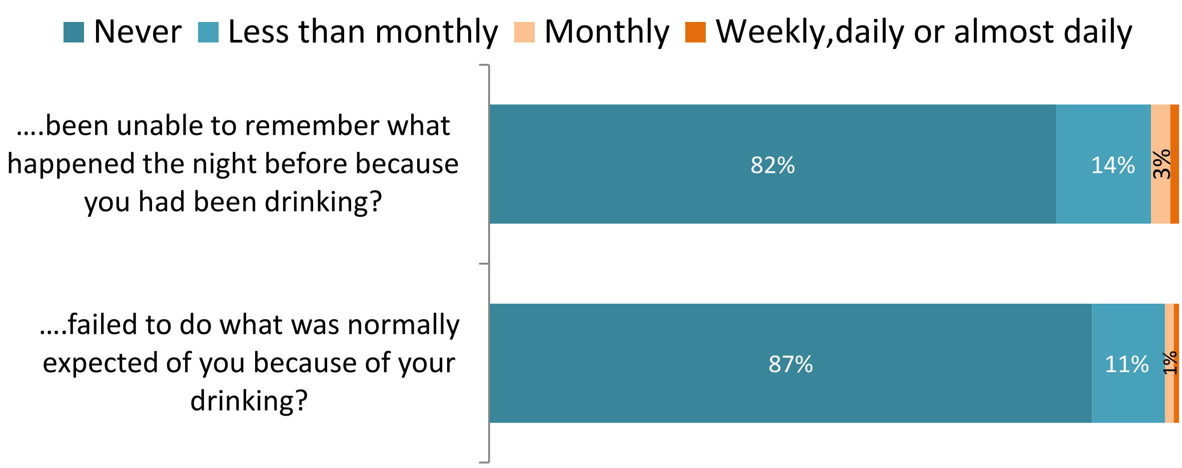

Residents were asked how often they drank either six (for females) or eight (for men) or more standard alcoholic drinks on a single occasion in the last year. Nearly a third (30%) reported that they had 'never' consumed this amount of alcohol on a single occasion in the last year. Around one in seven (15%) adults reported drinking this amount of alcohol 'weekly', and one in a hundred (1%) consumed this amount 'daily or almost daily'. (Figure 14.4)

**Figure 14.4 "How often have you had six or more standard alcoholic drinks if female, or eight or more if male, on a single occasion in the last year?"**




The majority of adults (82%) reported that they had 'never' been unable to remember what happened the night before because they had been drinking, during the last year (Figure 14.5). One in seven (14%) reported that this had happened 'less than monthly', fewer than one in twenty (3%) reported this happening 'monthly' and one in a hundred (1%) reported that this occurred either weekly, daily or almost daily. Respondents were also asked how often in the last year they had failed what to do what was normally expected of them because of their drinking; around one in a hundred (1%) adults stated that this had happened 'monthly' and a similar proportion (less than 1%) stated that this had occurred weekly, daily or almost daily.

**Figure 14.5 "How often in the last year have you.........."**



## Pre-loading (drinking before going out)

Residents were asked how often they drank alcohol at home, or a friend's house, before going out to a venue where they would drink alcohol, such as a club, restaurant or party. This activity is sometimes termed 'pre-loading'. Nearly a third (31%) 'never' pre-loaded, whilst an additional third (34%) 'rarely' did so. A fifth (20%) reported 'sometimes' pre-loading, whilst one in eight (13%) preloaded 'often' or 'very often. Younger age-groups were more likely to drink at home before going out to a pub, club, restaurant or party (see Table 14.4), but there was not a notable difference seen between men and women across different ages.

**Table 14.4 "How often do you drink alcohol at home, or a friend's house, before going out to a venue where you will drink alcohol (e.g. a club, restaurant, party?)" By age and gender - percentages**

| | | 16-34 years | 35-44 years | 45-54 years | 55-64 years | 65+ years | All ages |
|---|---|---|---|---|---|---|---|
| Men | Never or rarely | 44 | 72 | 80 | 82 | 79 | **67** |
| | Sometimes | 29 | 18 | 14 | 11 | 14 | **19** |
| | Often or very often | 26 | 10 | 6 | 7 | 7 | **14** |
| | *Total* | *100* | *100* | *100* | *100* | *100* | ***100*** |
| Women | Never or rarely | 43 | 68 | 71 | 77 | 92 | **66** |
| | Sometimes | 30 | 25 | 21 | 13 | 7 | **21** |
| | Often or very often | 28 | 7 | 8 | 10 | 1 | **13** |
| | *Total* | *100* | *100* | *100* | *100* | *100* | ***100*** |
| Both men and women | Never or rarely | 43 | 70 | 75 | 79 | 86 | **67** |
| | Sometimes | 30 | 21 | 18 | 12 | 10 | **20** |
| | Often or very often | 27 | 9 | 7 | 8 | 4 | **13** |
| | *Total* | *100* | *100* | *100* | *100* | *100* | ***100*** |

## Response rates and weighting

The rationale behind running a large random survey is that the results and inferences drawn will be representative of the overall population. Nevertheless, it is essential to check the profile of those who completed the form against other available population data to verify that the respondents do indeed reflect the population as a whole.

The overall response to JASS 2014 was very good, with a response rate of 52% - for a voluntary postal survey this is excellent. However, the proportion of young adults who respond to surveys of this kind is often low. To avoid over- or under-representation of views of these, and other, sub-groups of the population, the survey responses are weighted in proportion with the known whole population.

The response profile of this postal survey was compared against Census data from 2011 (just those aged 16 or over and living in private households to correspond with the target population for JASS). The age profiles are shown in Table A1. As was expected, fewer younger people and a greater number of older people responded to the JASS postal survey than their proportions in the total population would imply. However, the table also shows that, overall, the differences are not large, with the largest weighting factor (i.e. the ratio of the proportion of that age category in the sample to that in the total population) being close to 2. The small weighting factors of Table A1 are good for a survey of this nature.

Table A1 – Age profile of **unweighted** JASS survey response

| | **JASS 2014** | | **2011 Census*** | | **Implied weighting factor** |
|---|---|---|---|---|---|
| | **Respondents** | **Percent** | **Population** | **Percent** | |
| Unspecified | 27 | n/a | - | - | 1.00 |
| 16-34 | 193 | 12 | 23,825 | 30 | 2.47 |
| 35-44 | 239 | 15 | 15,410 | 19 | 1.29 |
| 45-54 | 347 | 22 | 15,428 | 19 | 0.89 |
| 55-64 | 319 | 20 | 11,581 | 15 | 0.73 |
| 65+ | 502 | 31 | 13,562 | 17 | 0.54 |
| **Total** | **1,627** | **100** | **79,806** | **100** | **1.00** |

Looking at response distributions for gender and tenure indicated that the responses should be weighted across the three dimensions of age, gender and tenure. This was possible using the Census 2011 population data, resulting in, for example, women aged 16–34 years living in owner-occupied accommodation having a weight of 2.25, whilst men aged 65 or over living in States, parish or housing trust rental accommodation had a weight of 0.46.

The resulting age and gender profiles after weighting are shown in Tables A2 – A4. All the results used in this report, apart from household internet access, are based on these three-dimensional weighted responses. Household internet access analysis is based on the data weighted just by tenure, due to the nature of the questions being at a household rather than at an individual level.

Table A2 – Age profile of *weighted* JASS survey response

| | **Percent** | |
|---|---|---|
| | **JASS 2014** | **Census 2011*** |
| 16-34 | 30 | 30 |
| 35-44 | 19 | 19 |
| 45-54 | 19 | 19 |
| 55-64 | 14 | 15 |
| 65+ | 17 | 17 |
| **Total** | **100** | **100** |

** aged 16 or over and living in private households*

Table A3 – Gender profile of *weighted* JASS survey response

| | Percent | |
|---|---|---|
| | **JASS 2014** | **Census 2011*** |
| Men | 49 | 49 |
| Women | 51 | 51 |
| **Total** | **100** | **100** |

Table A4 – Tenure profile of *weighted* JASS survey response

| | Percent | |
|---|---|---|
| | **JASS 2014** | **Census 2011*** |
| Owner occupied | 58 | 58 |
| Qualified rent | 17 | 17 |
| Social rent | 12 | 12 |
| Non qualified accommodation | 13 | 12 |
| **Total** | **100** | **100** |

After applying the three-dimensional weighting, other demographic variables were looked at, to see how the profile of sample respondents compared with known information on the full Island population.

After weighting, the Parish profile of the survey respondents was very similar to the Census distribution of residents of private households (Table A5).

Table A5 – Parish profile of weighted JASS survey response

| | Percent | |
|---|---|---|
| **Parish** | **JASS 2014** | **Census 2011*** |
| Grouville | 5 | 5 |
| St. Brelade | 10 | 11 |
| St. Clement | 10 | 9 |
| St. Helier | 35 | 35 |
| St. John | 3 | 3 |
| St. Lawrence | 6 | 6 |
| St. Martin | 3 | 4 |
| St. Mary | 2 | 2 |
| St. Ouen | 4 | 4 |
| St. Peter | 5 | 5 |
| St. Saviour | 13 | 13 |
| Trinity | 4 | 3 |
| **Total** | **100** | **100** |

## Confidence intervals

The principle behind a sample survey is that by asking questions of a representative subset of a population, conclusions can be drawn about the overall population without having to approach every individual. Provided the sample is representative then the results will be unbiased and accurate. However, the sample results will always have an element of statistical uncertainty because they are based on a sample and not the entire population.

Sampling theory means that the statistical uncertainty on any result for the full population, derived from a sample survey, can be quantified; this is done below for JASS 2014.

Under the sampling design implemented (simple random sampling without replacement[3]) the standard error on the estimate of a population proportion $p$ is:

$$s.e.(p) = \sqrt{\frac{p(1-p)(1-f)}{(n-1)}}$$

Where:

$n$ is the total number of respondents.

$f$ is the sampling fraction, equal to $\frac{n}{N}$, where $N$ is the number of households in the Island.

The 95 percent confidence interval on any proportion $p$ is then given by:
$p \pm 1.96 s.e(p)$ and attains a maximum for $p = 0.5$, i.e. 50%.

Using these formulae, the statistical uncertainty on results in this report which refer to the full population is ± 2.4 percentage points.

This means that for a question which gives a result of 50%, the 95 percent confidence interval is 47.6% to 52.4%. Rounding to zero decimal places, the result can be more simply considered as 50 ± 2 %.

**Put another way, it is 95% likely that a result published for the overall population is within ± 2% of the true population figure.**

For sub-samples of the population, e.g. by age band or residential qualification, the sampling fractions within each sub-category will vary. Nevertheless, the above formalism applies, and gives the following maximum confidence intervals for proportions (expressed as a range of percentage points) to be assigned to published results:

- Age-band: between ±4% (age 65+ years) and ±7% (age 16 – 34yrs)
- Gender: ± 3%
- Tenure: Owner-occupiers ± 3%; Non-qualified accommodation ± 10%
- Parish: urban (St Helier) ± 4%
  semi-urban: St Brelade, St Clement and St Saviour ± 4%
  rural: (all other parishes) ± 4%

As a result of the confidence intervals described above, results for the full population which show small changes or differences, e.g. of 1 or 2 percentage points, should be treated with some caution, as the differences will not be significant with respect to the confidence intervals to be attached to each single value.

However, for larger differences, of 5 percentage points or more, the chance that such a difference is due to sampling (rather than being a true measure of a difference or change in the overall population) is small. Since this report focuses on larger differences, there can be confidence that the results presented and inferences drawn do indeed reflect the views or behaviour of the overall population.

[3] *In fact, the sampling design incorporated stratification by Parish, with proportional allocation to the strata. The full estimated variance calculation under this design produces confidence intervals which are the same as those reported in this annex (derived using the simpler formalism) within the accuracy of percentage point ranges quoted to zero decimal places.*