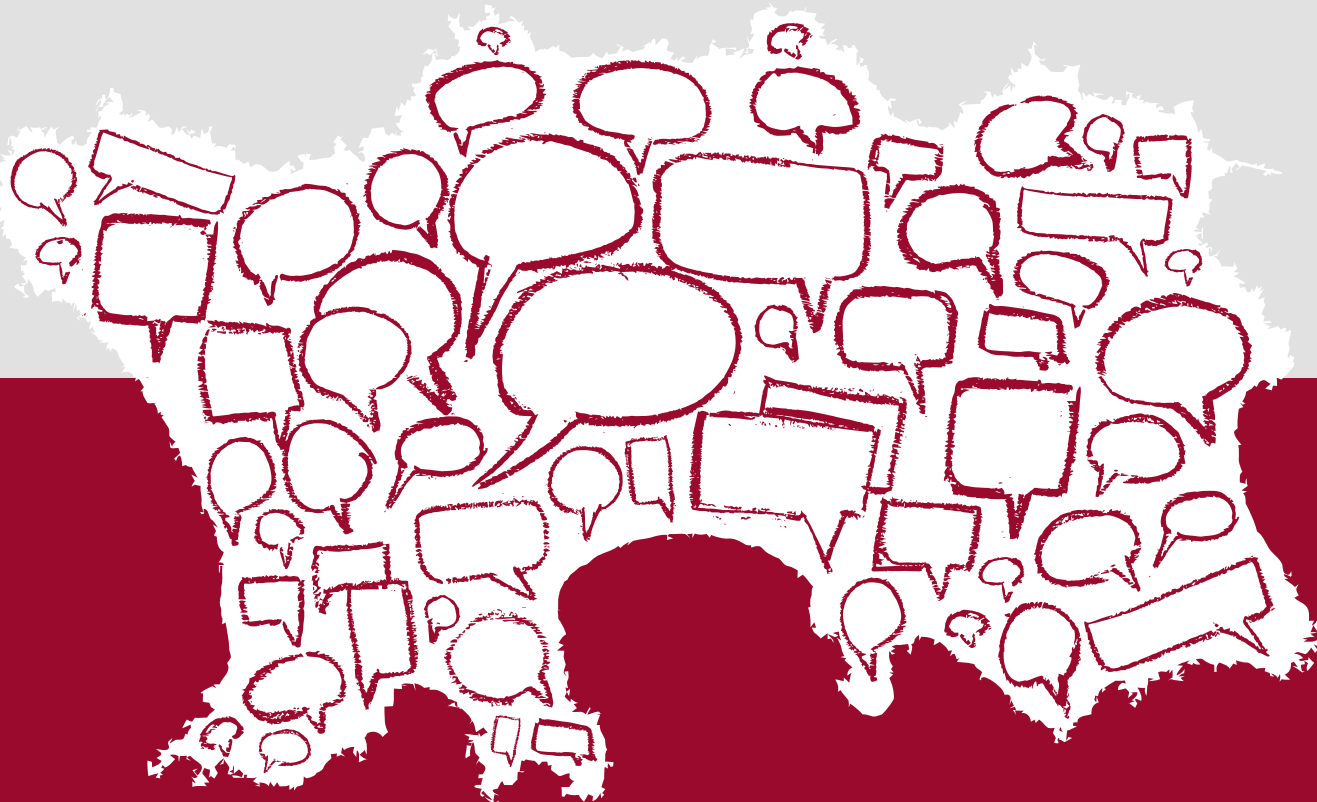


'MY JERSEY'



**Report on the findings of
the public consultation on
a future vision for Jersey**

November 2016

States
of Jersey

SHAPING
OUR FUTURE



Introduction

My Jersey survey

Over a period of six weeks in June and July 2016, nearly 4,150 Islanders took part in the 'My Jersey' survey in one of Jersey's biggest public consultations.

The survey asked Islanders to tell us what they think of Jersey now and their hopes for the future. Respondents scored Jersey today across a range of economic, environmental and community outcomes, identified the level of change they would like to see in the future and added nearly 8,000 comments.

Creating a shared vision

The purpose of the survey was to engage Islanders in thinking about Jersey's future and to share their aspirations as we work on the development of a new vision for Jersey.

We are delighted that Islanders have embraced the concept of a vision with such enthusiasm. Thousands of people attended briefings, talked to us at events and pop-up stands, saw material online or in the media. Their feedback has been overwhelmingly positive. The level of participation in Jersey's vision consultation to date already stands comparison with the best we've seen elsewhere. This is exactly what we need as the vision should reflect our shared hopes and ambitions as a community.

The findings and next steps

This report presents the main findings of the survey. It shows the positives of Island life but also highlights people's concerns and where they see opportunities to improve. Hopefully, it will inspire further discussion and encourage more Islanders to join the debate about the sort of island we should aim for.

The vision for Jersey consultation is not about what we should do tomorrow, next week or even next year. This Council is already working hard to deliver the priorities for its term of office. Rather, it is an opportunity to come together as a community and think about where we want Jersey to be in the future.

The focus of the process is on what success should look like - not the detail of the policies and strategies to get us there. It will be the job of future Councils to take stewardship of the vision and steer Jersey towards its long-term goals. In 2016, our task is to set out what we believe is realistically achievable, given our understanding of where we are today.

We would like to thank everyone who took part in the 'My Jersey' survey and to encourage even more people to join in future stages of the consultation so that, together, we can create a shared vision of our Island's future.



It shows the positives of Island life but also highlights people's concerns and where they see opportunities to improve.



Why does Jersey need a long-term vision?

Strategic planning

Since the introduction of Ministerial Government in 2006, each Council of Ministers has produced a Strategic Plan that defines the priorities for their term of office.

Whilst such medium-term plans are essential, Ministers have reviewed whether our planning system can be improved in line with international advice and best practice.

Looking longer-term

In particular, the Council has recognised the value of developing a longer-term vision for Jersey. This would provide context for each new Council's Strategic Plan and clarity for Islanders on what the States is working to achieve, not just during one political term of office, but over the longer-term.

A long-term vision works because the essential things people want from government remain fairly constant. As a community we want, for example, to be safe, have good jobs, access to good education, clean air and water and have affordable homes. Different governments may have different strategies and policies to help achieve these results, but the key outcomes that matter to our quality of life are enduring.

A long-term vision also allows for the fact that economic, environmental and social change don't conveniently fit with election cycles. Councils can implement new strategies or policies, or invest in new infrastructure, but the real impact of these efforts takes time to materialise. A long-term vision with proper measures in place provides a way of monitoring progress and evaluating if strategies are working.

A long-term vision will help each new Council develop medium-term priority plans as stepping stones towards clearly defined outcomes that we think Jersey should be aiming for. It will ensure that delivery strategies are properly joined-up across government and with delivery partners outside the public sector.



Different governments may have different strategies and policies to help achieve these results, but the key outcomes that matter to our quality of life are enduring.

What was the survey for?

Creating a shared vision

Describing the kind of island Jersey should strive to be in the future means balancing a range of economic, environmental and social outcomes that shape our quality of life.

As the vision will matter on a personal level to all of us, it should reflect our hopes and aspirations as a community. Involving Islanders in a conversation about our future is key to creating a credible, shared vision.

Organising the conversation

In order to provide a fair and objective way of organising this conversation, we developed the vision framework. It is structured as follows -

- 10 **strategic goals**, organised around community, economic and environmental themes, covering topics such as safety and security, affordable living, health and wellbeing and the natural environment.
- Each goal breaks down into more detailed **outcomes** - tangible subjects around which our future ambitions can be discussed and agreed. 'Safety and Security', for example, includes outcomes such as crime, fire and road safety.

The strategic goals and their outcomes provide an enduring framework for Jersey's strategic planning system. They also formed the key content of the 'My Jersey' survey.¹

Purpose of the survey

In order to build the vision, we need to understand where Jersey is now, decide what we value most, and agree our shared aspirations and ideas for the future. Two factors were key to the design of the survey.

Part of understanding where Jersey is today, is about the hard facts that provide insight into the social, economic and environmental status of our Island. It also requires an understanding of people's perceptions of progress. In some cases, they can be very different. The survey provided an opportunity to highlight where those gaps exist so that government can better explain options for the future.

Strategy starts with the end in mind – what does success look like? For that reason, the survey deliberately focussed on *what* Islanders wanted for the future – not *how* to get there. That detail belongs in consultations about individual delivery strategies.

The purpose of the 'My Jersey' survey, therefore, was to build an appreciation of:

- how people think Jersey is doing today against each of the outcomes in the vision framework
- people's ambitions for the future and where they perceive the greatest need for change

Strategy starts with the end in mind – what does success look like?

¹The vision Framework is illustrated at Appendix A

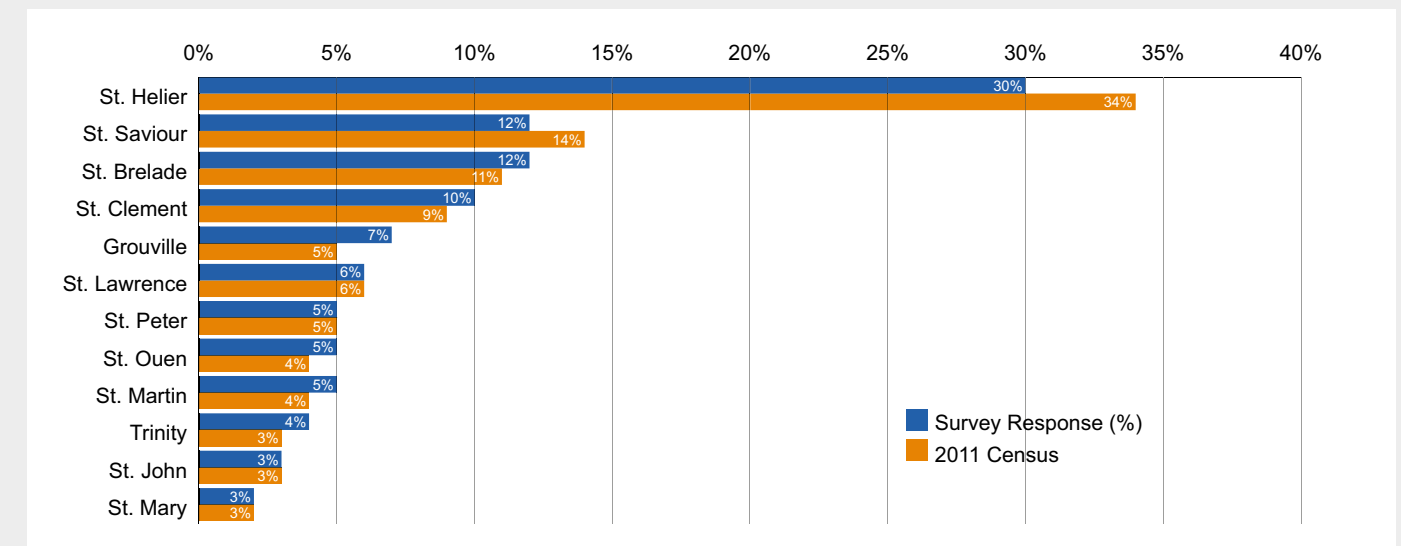
Who took part?

The survey was designed to allow everyone the opportunity to have their say at the cost of being statistically representative. When respondents self-select, results can be skewed by people lobbying for particular issues. This possibility was diluted by the

range of the survey topics and the sheer volume of participation. Trends in people's responses were also monitored as the survey progressed and remained quite consistent, so we believe the results provide a useful insight into public opinion.

Which parishes did respondents come from?

When compared to the 2011 census, the parishes where respondents lived was reasonably consistent.

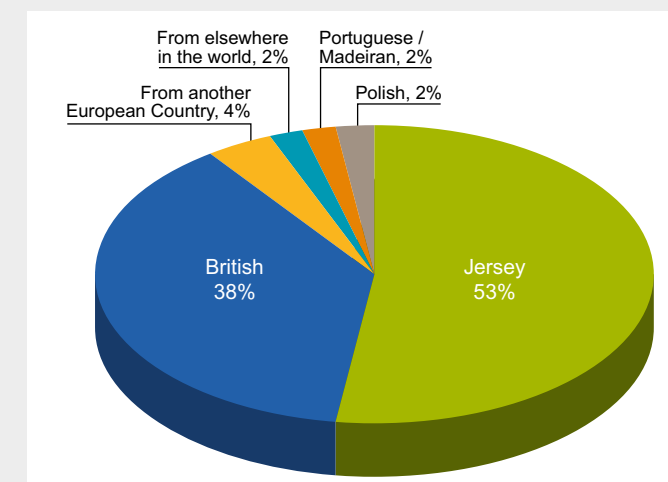


How did respondents describe themselves?

The survey asked respondents how they described themselves rather than asking about place or birth or nationality.

Whilst the results are not, therefore, directly comparable with the 2011 census, those figures can provide some context.

In 2011, half (50%) of Jersey residents were born in Jersey. Nearly a third (31%) were born in the British Isles. About one in fourteen (7%) of the resident population were born in Portugal / Madeira and 3% were born in Poland.

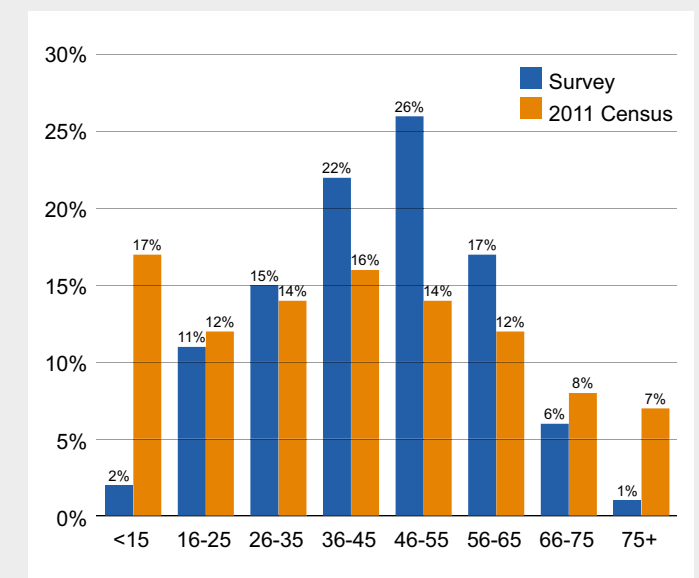


What was the survey's age/gender profile?

The graph compares the age of respondents with the age profile of Jersey's population in 2011.

For example, 15% of survey respondents were aged 26-35. In the 2011 census, 14% of Islanders were in this age group.

54% of respondents were female and 45% male.



What did the survey tell us?

Overall, the survey findings painted a positive view of Jersey today, with 80% of the outcomes scoring positively overall. More than half of respondents held positive views for 18 outcomes, compared to just one outcome where an overall majority of people held a negative view.

Community safety, health care, and giving children the best start in life came out high in people's future aspirations, while more people gave protecting the beauty of Jersey's natural environment and our air and water quality the highest possible score.

Key

- Community
- Environment
- Economy

Where do Islanders think Jersey is currently performing best?

These are the highest scoring outcomes where at least 70% of respondents scored Jersey positively.



Where do Islanders think Jersey is currently performing worst?

These are the only outcomes where more people scored Jersey negatively than positively.



Where would Islanders like to see most change into the future?

These outcomes are where the gap between perceptions of Jersey today and future ambitions was greatest.



Where are Islanders future ambitions for Jersey the highest?

More than 50% of Islanders set their future ambition for these outcomes at the highest possible level.



Your vision for Jersey

The survey asked people to tell us their vision for Jersey in one sentence.

These are some of the key words they used to describe their vision. The bigger the word, the more often it was used.



Some of your visions for Jersey

A community where everyone feels they are valued and genuinely belong.

A fairer society where EVERY member of the community is equally valued and treated as being of worth.

A happy place with a good quality of life and protected natural environment.

A Jersey that is Jersey - inclusive of other cultures but still distinctively Jersey.

A modern and progressive Island that's inclusive of other cultures without forgetting what makes Jersey special and unique.

A place where my child can grow up safely and get the best home and education at an affordable price.

To continue to thrive as a business centre within a caring social structure.

Fairer, happier, cheaper.

A self-sufficient, clean, crime and pollution-free Island with a set of fair and just standards we can all adhere to.

A vibrant, generous community that enables all Jersey citizens to flourish, with a continued vision to be a positive influence in the wider world.

A cultured place full of character, soul and entertainment for all ages.

A welcoming, generous, trusting Island community which epitomises how modern life can be tolerant, environmentally sustainable and unique.

An environmentally sustainable Island, which is well-connected to the world and continues to enjoy an enviable standard of living, but with new (non-finance) sources of wealth and a broader range of opportunities for young people.

Jersey - the world-leading offshore finance centre to work, rest and play.

An Island community governed by and filled with open-minded, forward-thinking individuals living and acting together for the benefit of the many, not the few. I want Jersey to be a truly enviable place to live.

Free, fair, independent and prosperous - a great place to live.

An Island full of happy, healthy, hard-working people, who can afford to own their own property, have a job they love and a good work/life balance. All while being supported by a government that cares about their lives and happiness. And be proud to live in a place that is genuinely special and different.

An Island of substance which offers world-leading expertise.

An Island for all Islanders where everyone contributes, everyone benefits and everyone can be proud to live in a place that is genuinely special and different.

A clean, safe, affordable place to live in and bring up children.

An Island which promotes academic achievement and education, entrepreneurship, environmental sustainability and wealth generation.

An Island which strives to act in a sustainable way with an equal balance between environment and economic growth.

Better government, better healthcare, better options for locals who cannot afford housing. Respect the beautiful environment we live in and be proud of it.

Cherish what we have, protect what we have but don't stifle progress.

For the Island to be less finance-focused, more affordable and for St Helier to be a vibrant and modern capital with more independent and local business.

Jersey should be a place for the whole family to enjoy, Islanders and visitors alike.

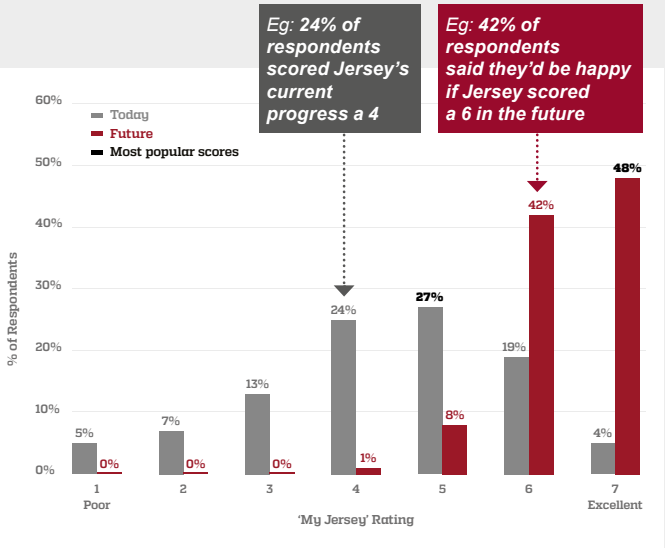
How the survey results are presented

The survey asked people to score how Jersey is doing today against 35 different outcomes, with 1 being the lowest score and 7 the highest. A don't know option was also available for Jersey today. They were then asked what score they would be happy with in the future.

The survey results for each outcome are presented in graphs like the one below. They give an overview of how people scored each outcome overall, the most popular scores and the spread of scoring for Jersey now and in the future.

Jersey today and in the future

- In the graph, each column shows the % of people scoring 1,2,3 etc., for Jersey today (grey columns) and in the future (red columns).
- The numbers in bold are the most popular individual scores for Jersey today and in the future.
- To make interpretation of the results simpler, ratings/scores are categorised as follows:
 - Scores of 1, 2, or 3 are negative
 - A score of 4 is neutral
 - Scores of 5, 6, or 7 are positive
- The largest number of negative or positive responses is highlighted.

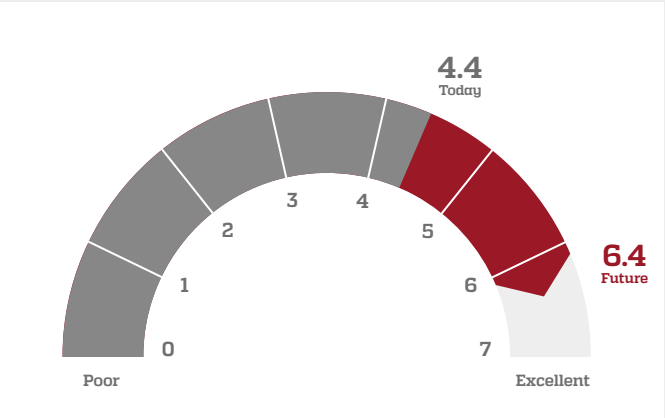


Closing the gap

A key purpose of the survey was to identify the level of change Islanders felt Jersey should be aiming for into the future. This is presented graphically by a dial like the one here.

The dial plots the average score for Jersey today against the average score that people would be happy with in the future. In the worst case scenario, Islanders could have scored Jersey's current progress a 1 and set an ambition of 7.

A brief summary of people's comments is then provided. Whilst Islanders held positive views about Jersey's progress on 80% of the outcomes, the focus of this section is on understanding people's concerns about Jersey today and learning where there might be opportunities to improve in the future. A selection of quotes from the comments received are also included for each outcome, again focused mainly on the concerns raised.



What happens next?

The 'My Jersey' survey formed one part of the consultative process designed to produce a vision for Jersey.

So what are the next steps?



¹The vision Framework is illustrated at Appendix A

 COMMUNITY	
Safety & Security	
People and property are protected against crime and disorder	14
People, property and the environment are protected against fire	16
Jersey's roads are safe	18
Jersey is ready to respond to major emergencies	20
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Learn & Grow	
Jersey's children have the best start in life	24
Islanders are happy with their work/life balance	26
Vibrant & Inclusive	
Jersey is a welcoming and caring community	28
Sport is important and valued in Jersey	30
Arts, heritage and culture are important and valued in Jersey	32
Health & Wellbeing	
Islanders live healthy lives and risks to health are reduced	34
Islanders have access to good quality health care	36
People living with long-term conditions or disability enjoy a good quality of life	38
Affordable Living	
Islanders can independently afford a decent standard of living	40
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 ENVIRONMENT	
Built & Historic	
St Helier is a vibrant capital where people want to live, spend time and invest	46
Environment	
Jersey's built environment provides quality homes and neighbourhoods	48
Jersey's historic buildings and heritage sites are valued and protected	50
Islanders can travel around Jersey easily	52
Natural Environment	
The beauty of Jersey's countryside and coast is protected	54
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Jersey's wildlife, plants and habitats are protected	58
Sustainable Resources	
Jersey's air is healthy to breathe	60
Jersey's fresh water resources are clean and sustainable	62
Jersey has secure, affordable and sustainable energy	64
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 ECONOMY	
Attractive Business Environment	
Jersey has a skilled workforce, aligned to the needs of business	72
Jersey is a digitally connected Island	74
Jersey encourages new business, inward investment and competition	76
Jersey is a great place for businesses to innovate and be creative	78
Jersey has a fair, competitive and stable tax system	80
Jersey has a stable and low rate of inflation	82
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Islanders can access rewarding jobs	84
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Community

Jersey is home to many people; people who were born here, people who came and never wanted to leave, people who are just passing through. Our future is vested in being a place where people want to be or always have a reason to come back to. A great place to live, socialise, grow up and belong; a place where people and community matter.

The Community section comprises five strategic goals.

- SAFETY & SECURITY
- LEARN & GROW
- VIBRANT & INCLUSIVE
- HEALTH & WELLBEING
- AFFORDABLE LIVING

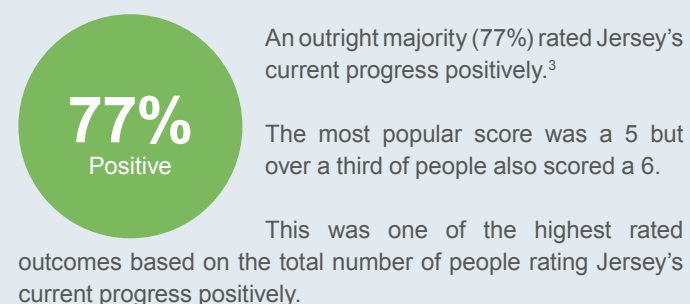
These five goals break down into a total of 15 more detailed outcomes.

People and property are protected against crime and disorder

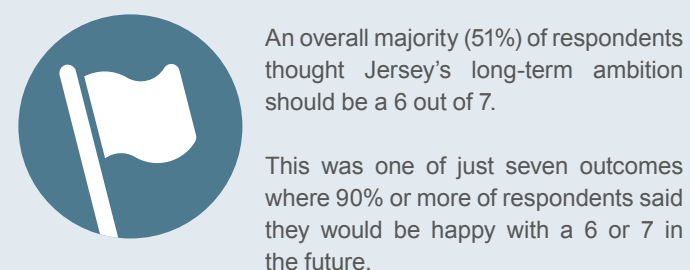
Why is this outcome important?

Crime, and fear of crime, can have a corrosive effect on people's sense of personal security and community wellbeing. Protecting Islanders against crime, by addressing its causes, through prevention and detection, and by mitigating its impact, is a key function of government.

Today



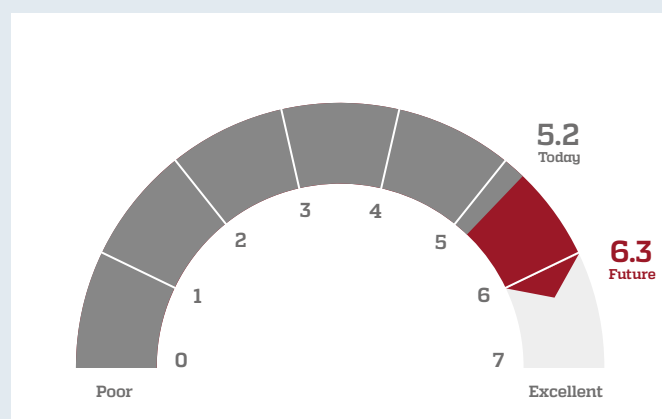
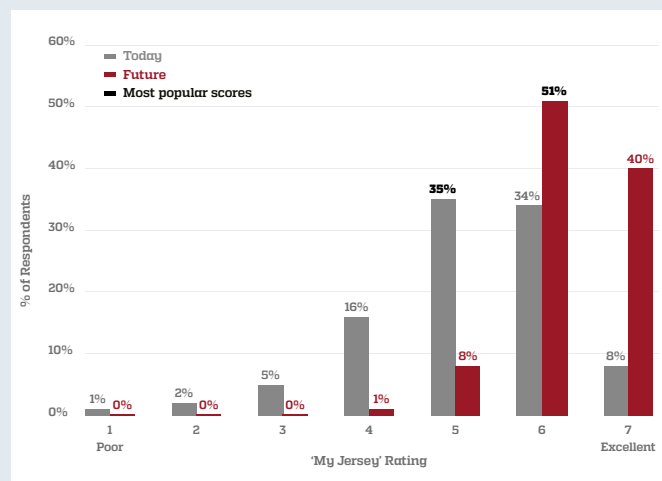
Future



Closing the gap

On average, Islanders scored Jersey's current progress as a 5.2, whilst the average score for Jersey's future ambition was a 6.3. Although the aspiration for the future has been set high, the gap between current progress and future ambition was one of the narrowest.

Islanders clearly want to preserve the levels of safety we currently enjoy and their concerns tended to focus on the harm caused by alcohol and drugs, perceived safety in St Helier's night time economy, the emerging threat posed by cyber-crime and unease that service cuts might compromise what has been achieved.



"I feel safe here, not worried about crime."

"Jersey is undoubtedly the safest place I have ever lived."

"Low levels of crime do not mean there is a requirement to reduce expenditure but demonstrates the impact of investment in preventative strategies, early intervention and education!!"

"Town in the evenings can be an unpleasant place to be in terms of anti-social behaviour."

"Many locals don't realise how safe Jersey is, so I think crime and disorder isn't a major area for improvement, although maintaining current high standards should be important."

"Town at night is a lot safer than mainland towns although I steer clear on Fridays and Saturdays."

"More needs to be done to tackle drugs."

"Online crime is the most worrying, but still feel very safe here."

³All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses.
140 respondents said they didn't know how Jersey was currently performing against this outcome.

People, property and the environment are protected against fire

Why is this outcome important?

Fires can have a devastating effect on lives, livelihoods, our environment and property. Minimising their occurrence and impact helps ensure people feel safe and protected as well as protecting our economic and environmental interests.

Today

84%

Positive

An outright majority (84%) rated Jersey's current progress positively. ⁴

The most popular score was a 6 out of 7.

This outcome was ranked highest in terms of the total number of people rating Jersey's current progress positively.

Future

Nearly half (47%) of respondents thought Jersey's long-term ambition should be a 6 out of 7.

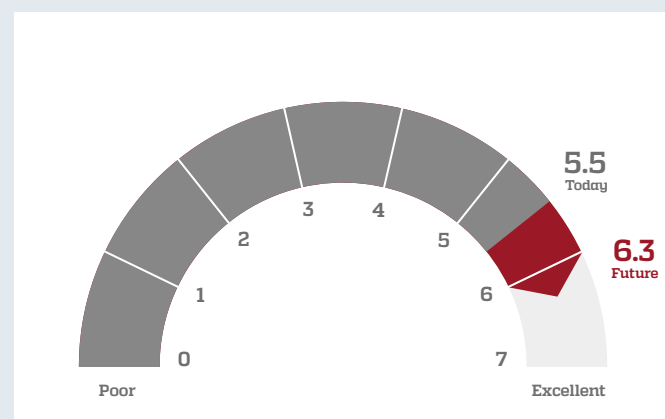
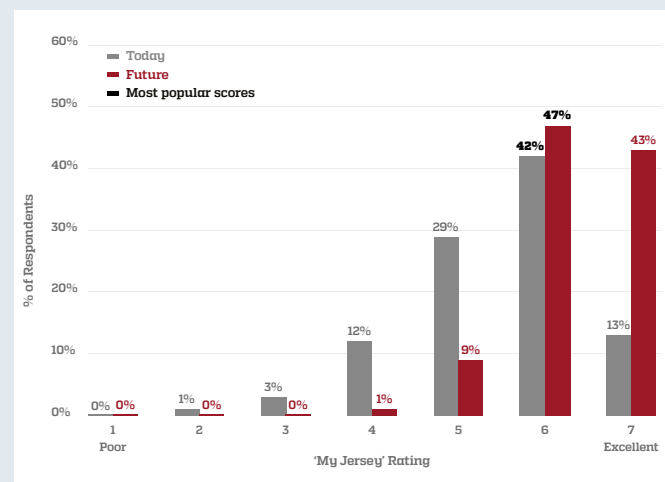
This was also one of the seven outcomes where 90% or more of respondents said they would be happy with a 6 or 7 in the future.

Closing the gap

On average, Islanders scored Jersey's current progress as a 5.5 whilst the average score for Jersey's future ambition was a 6.3. The gap between current performance and future ambition was narrower for fire safety than any other outcome in the survey.

Given the high score attributed to fire safety by survey respondents, there was comparatively little comment on this outcome. An issue that was raised by several respondents was fire safety in lodging and other rental accommodation.

Again, concerns were raised about the potential impact of funding cuts on front-line response services.



“First response services in Jersey are fantastic, especially fire and ambulance.”

“Fire prevention comes from newer housing stock and education.”

“Fire regulations enforcement needs to be ramped up for houses in multiple occupation. I suspect landlords are raking in the rent and not making their premises safe.”

“People whose residential status is ‘registered’ are not protected from fire in the very sub-standard accommodation available to them.”

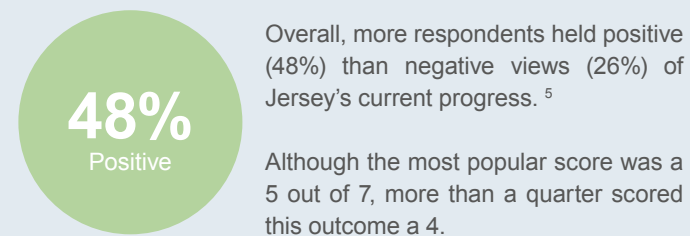
⁴All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 342 respondents said they didn't know how Jersey was currently performing against this outcome.

Jersey's roads are safe

Why is this outcome important?

Most of us use the roads every day as drivers, passengers, cyclists and pedestrians so road safety is an issue that affects everyone in Jersey. Death, injury and disability resulting from motor vehicle crashes inflict pain and suffering on individuals, families and communities. Major crashes can also have a significant impact on health care and emergency service resources.

Today



Future

50% of respondents thought Jersey's long-term ambition should be a 6.

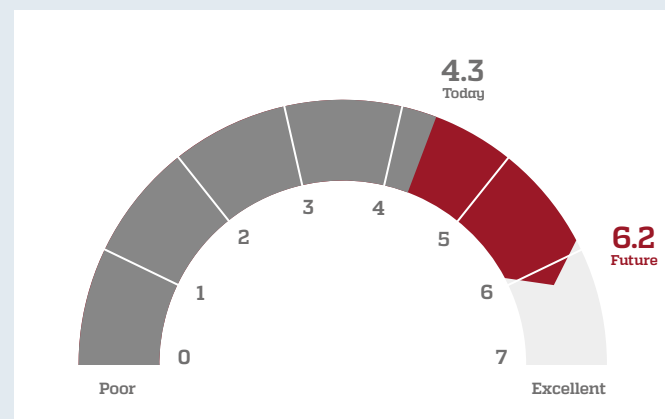
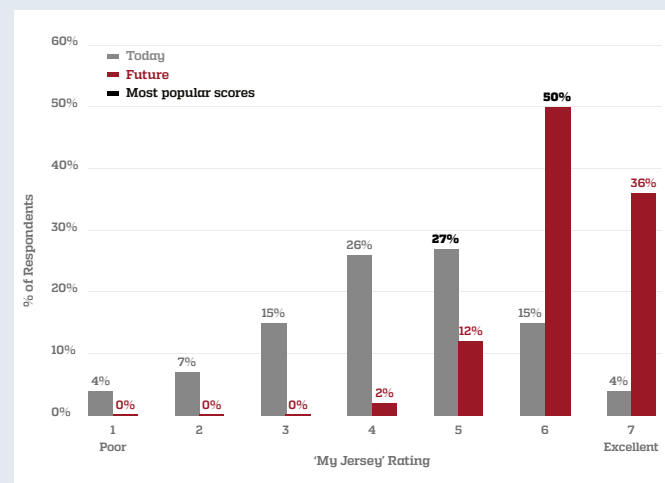
Closing the gap

On average, Islanders scored Jersey's current progress as a 4.3, whilst the average score for Jersey's future ambition was a 6.2.

Although the overall view of road safety was positive, the comments highlighted where some respondents perceive opportunities to improve. Concerns were frequently raised about the quality of road surfaces, the size of vehicles and driving standards and behaviour.

Many people wanted to see more road safety policing and tougher action taken against persistent offenders who continually put other road users at risk.

It would seem that concern at the vulnerability of cyclists and pedestrians on Jersey's roads leads many people to prefer the car over more active forms of travel.



"I have never seen so many speeding and inconsiderate drivers in all the years I have been here."

"Speeding is a HUGE issue as well as phone usage and incompetent driving."

"Too many cars which drive fast. It is scary to cycle on the roads now."

"We could do with more traffic police dedicated to catching culprits in the act. Simply reducing speed limits or installing 'traffic calming' measures does not catch the constant flouters of the rules."

"Cyclists (I am one) go through red lights, cycle up one way streets, cycle on the pavement and wear headphones so they can't hear the traffic."

"Surely a system of annual roadworthy certification as a requirement would ensure that the majority of motor vehicles, including large HGVs are much safer than they are at present."

"...too many cyclists and motorcyclists doing too much erratic weaving in and out of traffic during rush hour."

"As a driving instructor I believe that... there needs to be more of a police presence on the road network so as to target people using mobile phones when driving, people jumping amber and red lights and in general enforce basic road safety such as motorcycles and mopeds undertaking/cutting in and out of traffic."

"The state of a number of roads is awful."

"Cyclists should have to do a road theory test as well."

"The multiple speed limits set up by each parish's whim are a joke and all too often ignored."

⁵All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 58 respondents said they didn't know how Jersey was currently performing against this outcome.

Jersey is ready to respond to major emergencies

Why is this outcome important?

When crises occur everyone expects government to be able to respond. Planning, organising, coordinating with other agencies and organisations, education and training, exercises, public awareness campaigns, and quality assurance are all important aspects of emergency preparedness.

Today

53%
Positive

Although more than one in five said they didn't know how Jersey was doing, an outright majority (53%) of the remainder rated Jersey's current progress positively.⁶

The most popular score was 5 out of 7.

Future

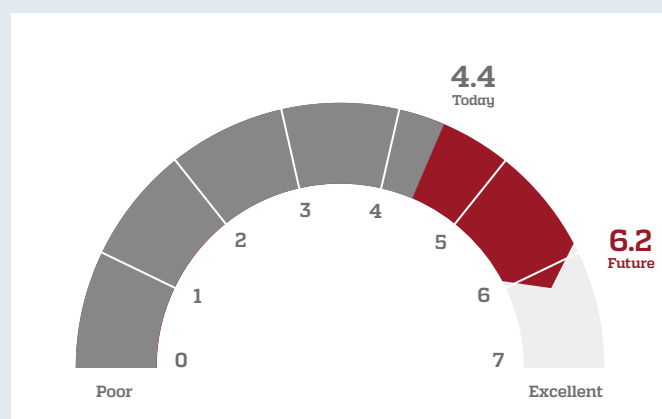
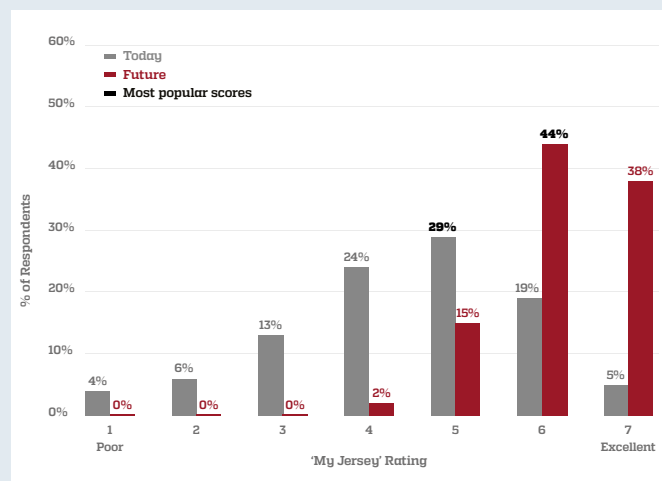
An overall majority (51%) of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.4, whilst the average score for Jersey's future ambition was a 6.2.

The fact that so many people said they didn't know how to score Jersey's progress on this issue was reinforced by comments highlighting a desire for more information about emergency planning.

Concerns were expressed about Jersey's capacity to respond to different scenarios, although others felt there was a balance to be achieved in managing the risks appropriately.



“The authorities may be ready for major emergencies but this isn’t visible to the population.”

“The emergency services can easily be stretched to their limits when a number of incidents happen at the same time. Everyone is excellent and does a good job but what would happen with a large emergency?”

“There may be insufficient resources for certain extreme events, but that is understandable in a small community and I do not think that we can prepare for all extraordinary events or that we should.”

“Services are very well prepared for several major emergencies, however, those which we have not experienced before or those on a very large scale I am not so sure about.”

“In the event of a major incident we do not have the trauma or resident surgical skills to deal with a mass incident resulting in major casualties or fatalities. What is our plan?”

“The civil emergency sirens need more explanation to us.”

“We need to be secure in the knowledge that if we need specialist services or even additional people to deal with the whole range of possible emergencies... either UK or French assistance is pretty much guaranteed.”

⁶All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses.
984 respondents said they didn't know how Jersey was currently performing against this outcome.

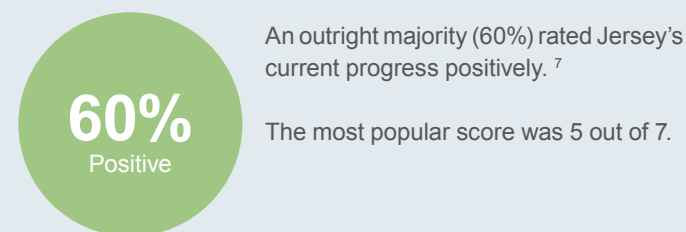
People's health and safety are protected

Why is this outcome important?

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

Unfortunately, the comments written by some survey respondents revealed that they had confused 'health and safety' with separate outcomes regarding personal wellbeing and the provision of health care services. This will have impacted on the scoring of Jersey's current position and future ambition for this outcome.

Today



Future

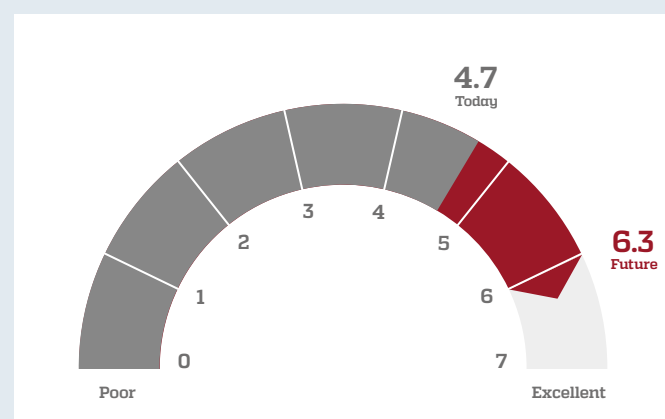
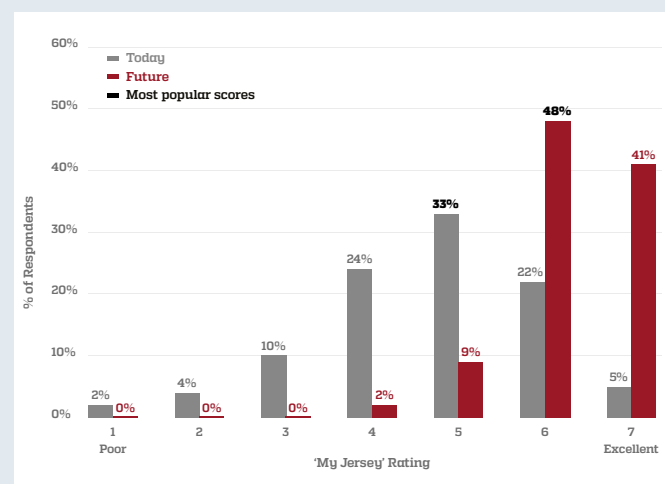
Nearly half (48%) of respondents thought Jersey's long-term ambition should be a 6.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.7 whilst the average score for Jersey's future ambition was a 6.3.

Given the issues concerning the interpretation of 'health and safety', the main value lay in the comments specifically relating to this subject.

Some felt people should take more responsibility for their own health and safety in their daily lives and in the public domain, whilst others felt more should be done, particularly in the workplace, to protect employees.



“Health and Safety Laws need to be more robust.”

“I don’t want a government that gets involved at that level with how we live our lives.”

“Health and safety provisions are over burdensome. More responsibility should be placed on individuals.”

“Employee health and safety is often compromised particularly in the construction industry...”

“...many local companies... are not seeking to improve their performance or only aiming for the bare minimum standard.”

“My husband is an electrician. He tells me that some of the work he comes across is very dangerous and could cause fire. He also tells me about very poor health and safety practices.”

“Zero hours contracts in the building industry means people work even if they are sick otherwise they don’t get paid. Social Security sick pay would not even cover rent. This impinges on health and safety in the workplace.”

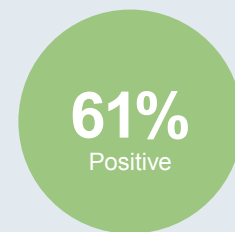
⁷ All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses.
142 respondents said they didn't know how Jersey was currently performing against this outcome.

Jersey's children have the best start in life

Why is this outcome important?

All Jersey's children and young people should be able to grow up in a safe, supportive Island community in which they achieve their full potential and lead happy, healthy lives. The skills that young people have when they leave formal education are a strong predictor of their life chances.

Today



An outright majority (61%) rated Jersey's current progress positively. ⁸

The most popular score was a 5 out of 7.

Future



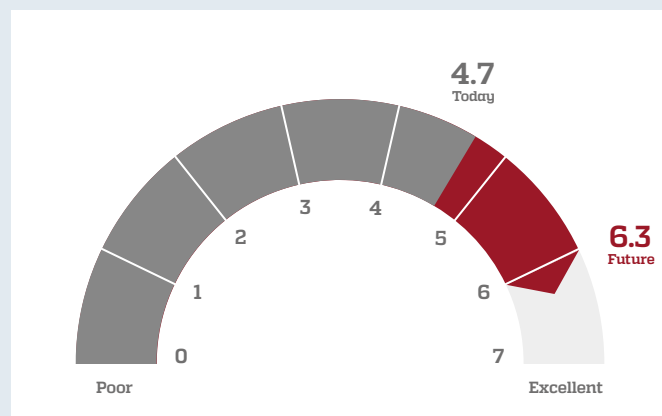
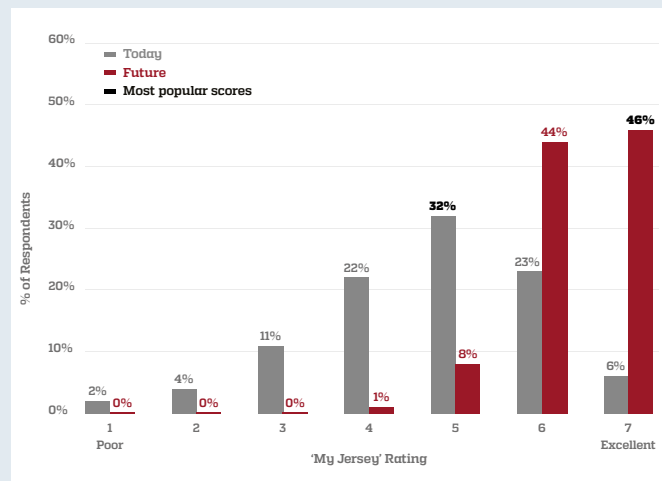
This was one of the highest-rated outcomes for the future with 46% of respondents saying Jersey's long-term ambition should be a maximum 7.

It was one of just seven outcomes where 90% or more of respondents said they would be happy with a 6 or 7 in the future.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.7, whilst the average score for Jersey's future ambition was a 6.3.

The overall view of this outcome was very positive and people readily acknowledged that Jersey enjoyed significant advantages as a place to grow up in terms of access to the environment and high levels of safety. Perceived opportunities to improve in the future highlighted the way Jersey's education system is structured and whether it enabled all children to achieve their potential. Current policies regarding maternity provision, the funding of nursery care and university education were often perceived as not being in the best interests of the Island's children. There were also concerns at the range and cost of activities for children and the amount of time that many parents were able to properly invest in family life.



"I would like to see greater support for training parents about how to parent confidently & consistently... and more structured activities for kids to help engage their interest & expand experiences..."

"The design of the education system is inequitable."

"Children are exposed to adults drinking to excess in Jersey."

"Student loans are needed and more needs to be done with University to ensure students will only pay UK fees not international fees."

"We forget about the kids that live in town but rely on schools to be the ones that first take them to the beach, to the zoo. Perhaps this Jersey pupil Premium will help give them a better start in life?"

"I won't be able to afford University for my kids yet they are more than capable of getting good degrees. Is it right I have to sell our modest family home in order to pay?"

"The States want to improve and build new nurseries but I don't think they are looking in the correct place. They need to give parents much much longer maternity/paternity allowance..."

"High rents make parents work long hours = unsupervised children and poor childhood."

"Some children are deprived of what we would say are essential skills because their parents are too busy working to devote the necessary time to them."

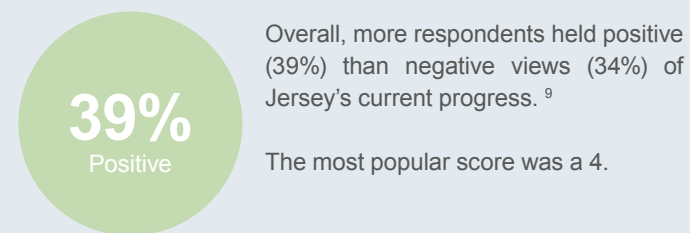
⁸ All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 265 respondents said they didn't know how Jersey was currently performing against this outcome.

Islanders are happy with their work/life balance

Why is this outcome important?

Finding a balance between time spent at work and time spent on family commitments and personal lives is considered central to overall well-being.

Today



Future

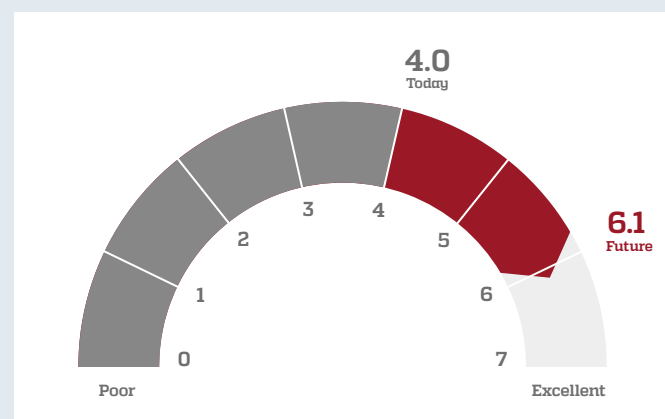
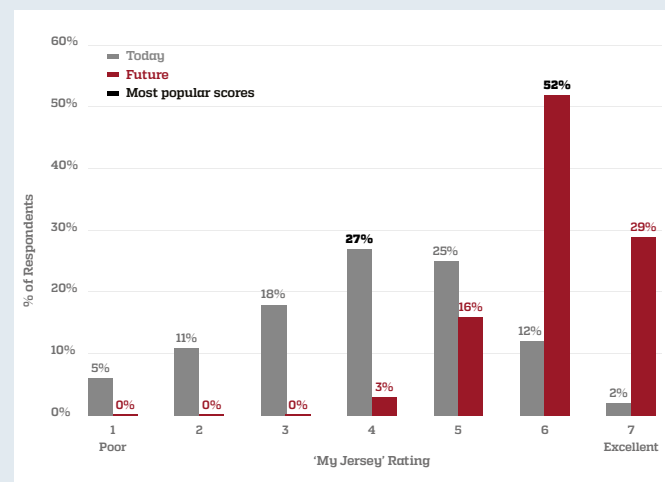
A majority of respondents (52%) thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.0, whilst the average score for Jersey's future ambition was 6.1.

Whilst many acknowledged the natural advantages of Island life in terms of access to coast and countryside and short commuting distances, many felt that living costs severely impacted on their work/life balance.

In particular, people highlighted the long hours they worked in order to meet the cost of decent rental accommodation or a mortgage. Some felt that excessive housing costs denied them the opportunity to start a family whilst parents felt that cost pressures compromised their ability to spend quality time with their children. This drove two issues that were repeatedly highlighted regarding the perceived inadequacies of maternity provision in Jersey and the cost of, and funding for, nursery care in the Island.



"I am the mother but also the prime earner in our family and am gutted that I will have to continue to work the hours I do to pay for nursery education and am going to miss out on the opportunity to spend any time with my children before they begin school age."

"...the cost of private nursery is as much as an average salary, if the Island wants people to work, they need to make it viable."

"I personally am working full time, see my children for two hours during the working week and am only scraping by with providing food/clothing/bills. I have a decent job, no debts but will be caught in this rut until the children are both at school and my other half can return to work as we cannot afford nursery fees."

"Cost of housing has a negative impact on family life. Rents often higher than monthly mortgage repayments but working families simply cannot afford to eat AND pay huge deposits currently required to secure mortgages."

"Work/life balance is great though, but this is because the commute is short and the Island so small!"

"Maternity leave is one of the worst and shortest I have ever come across."

"Just to be able to rent a half decent place means working every hour possible and missing out on a good work/life balance."

"I think children and parents would benefit significantly from extended paid parental leave as in other societies in Europe."

⁹ All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses.
197 respondents said they didn't know how Jersey was currently performing against this outcome.

Jersey is a welcoming and caring community

Why is this outcome important?

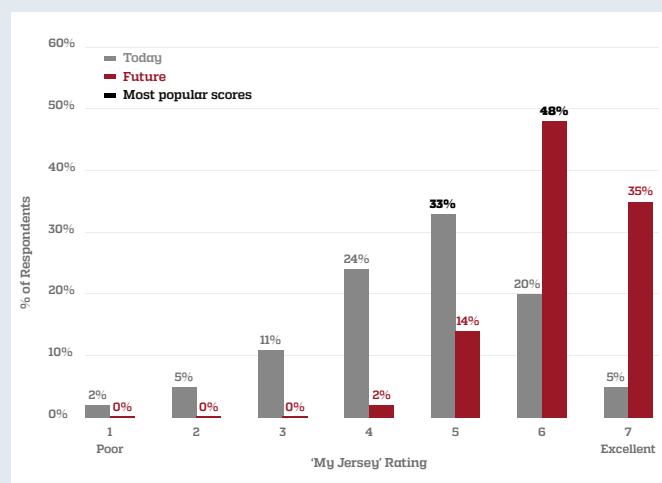
As a small Island, Jersey has always prided itself on its sense of community. We need to build upon that tradition so that Islanders enjoy a sense of belonging, value the diversity of people's different backgrounds and circumstances and work together to tackle exclusion and marginalisation.

Today



An outright majority (59%) rated Jersey's current progress positively.¹⁰

The most popular score was a 5.



Future

48% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

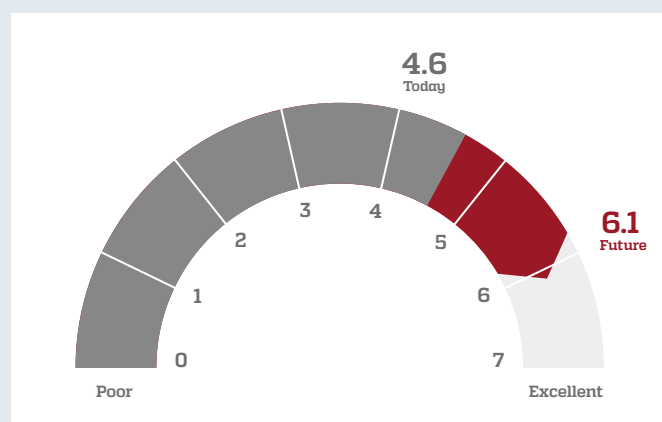
On average, Islanders scored Jersey's current progress as a 4.6, whilst the average score for Jersey's future ambition was 6.1.

Although the overall view of this outcome was very positive, the comments highlighted where some respondents perceive opportunities to improve.

Many comments reflected perceptions that many aspects of Jersey life were at risk because of excessive immigration. On the one hand this was reflected in perceptions that some migrant communities were quite closed and, on the other, that Jersey's sense of identity was being eroded as the Island became increasingly 'anglicised'.

By contrast, others were concerned at the attitudes displayed towards migrant communities and the way they were treated in the employment and housing markets. People who had moved to Jersey commented on how difficult it can be to integrate into the community.

A number of comments highlighted the value of volunteering and charitable work as a means of building a stronger society.



"...it can be very difficult for new people to make friends and a support network."

"More people of all backgrounds need to put more into our island to create a better and stronger society."

"Being a small island community also means we have the opportunity to remain a place where community really means something."

"Welcoming? No! Caring to its own and others around the world, yes."

"It's not just a Jersey thing, but the culture in US and UK of long hours is harmful to mental health and family life, and leaves little time for people to engage with the community."

"...we have so many immigrants who don't care for our local community and only come to get the money and send it home."

"There is still a lot of prejudice towards our minority populations."

"There is a lot of work to be done to establish equality for all across all areas of life."

"Jersey is still not very tolerant or promoting of diversity."

"I would like there to be more cultural integration between Jersey people, British, Portuguese, Polish and other nationalities living here..."

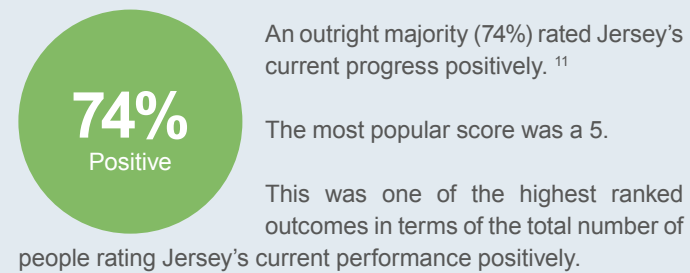
¹⁰ All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses.
93 respondents said they didn't know how Jersey was currently performing against this outcome.

Sport is important and valued in Jersey

Why is this outcome important?

Sport is a powerful tool to strengthen social ties and networks. Participating in physical activity is not only good for individual children and adults, it also has a positive impact on our community, particularly in terms of social cohesion, economic activity and the cost of medical care.

Today



Future

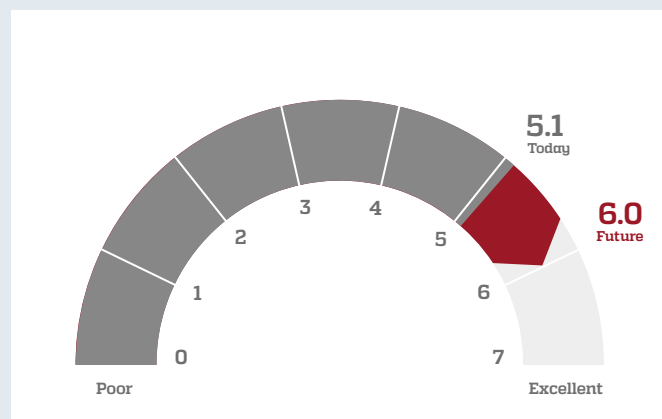
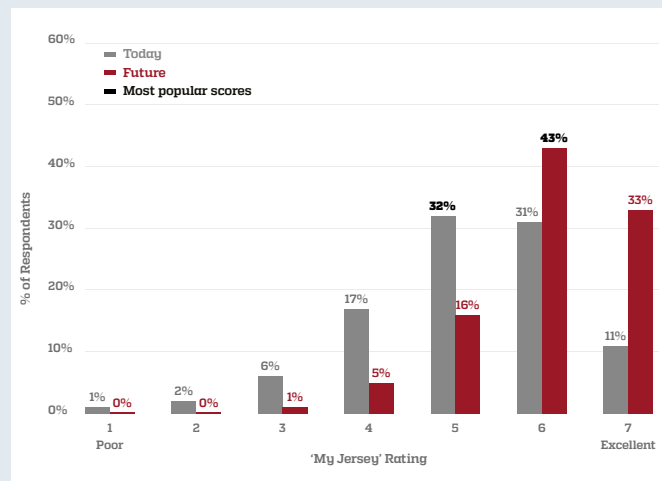
43% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 5.1, whilst the average score for Jersey's future ambition was 6.0.

The high score for Jersey's current progress meant that the gap to our future ambition was one of the narrowest.

The standard of facilities and competition in certain high profile sports for such a small island were recognised. Comments did highlight, however, the importance of providing opportunities across a range of sports at a community level and the importance of such provision, and participation, in helping improve health and wellbeing.



“Only certain sports get proper support.”

“We are very spoilt for sport via clubs but sport in schools is woefully inadequate. All 3 of our kids in secondary, if they chose to, could partake in little more than one session of sport a week.”

“Improving promotion of and access to sport activity, for all age groups but specifically children and younger people will, I feel, be one of the most important factors in managing demand on health services in the coming decades.”

“I feel Jersey puts sport above all else, which is sad as not everyone is naturally sporty.”

“Jersey offers a wide range of sporting activities with many sports performed at a very high level for such a small community.”

“Sport in terms of achievement is valued. But not enough effort put into sport for the sake of wellbeing and health, even for those who aren't 'sporty' or have a disability.”

“The benefits of sport, especially to the health of Islanders, and to the Jersey economy through visiting players and supporters, needs to be better recognised and encouraged.”

“More sports facilities and open spaces to be built by schools that can be accessed by the wider community.”

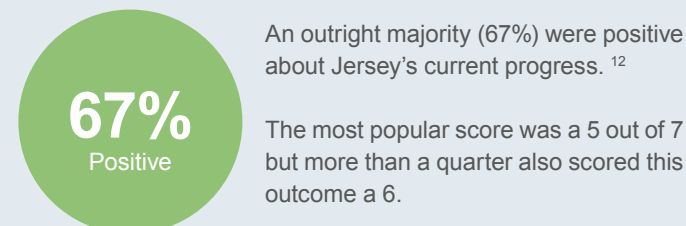
¹¹ All figures represent the % of respondents who expressed an opinion and therefore don't include the 211 people who said they didn't know how Jersey was currently performing against this outcome.

Arts, heritage and culture are important and valued in Jersey

Why is this outcome important?

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

Today



This was one of the highest ranked outcomes in terms of the total number of people rating Jersey's current performance positively

Future

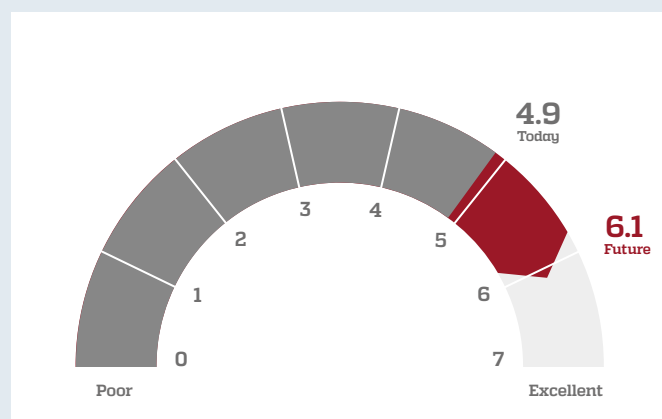
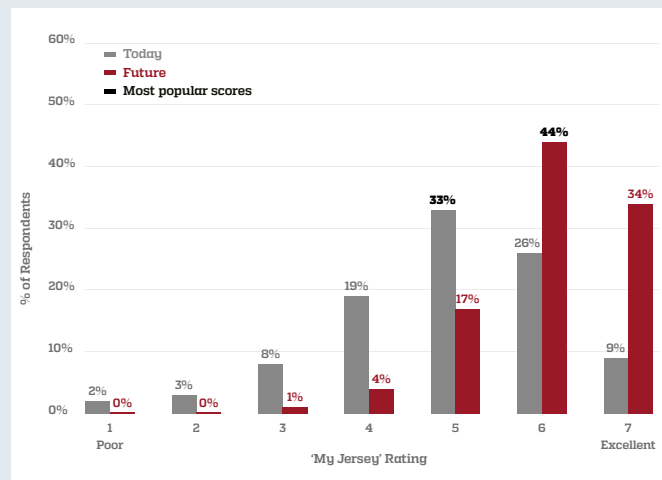
44% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.9, whilst the average score for Jersey's future ambition was a 6.1.

This was one of the areas where the gap between people's perceptions of where Jersey is today and what we should aim for in the future was narrower.

The comments reflected how Jersey's arts, heritage and culture matter deeply to many Islanders, who generally see them as an essential part of individual and community well-being. Many advocated the importance of cultural activities in making Jersey an attractive place to live for younger people.



"There is virtually no investment in culture. Appalling!"

"Investment in cultural entertainment is virtually non-existent."

"Arts, heritage and culture always seem to be forgotten when planning economically for the future of the island."

"Arts and culture are currently seen as a bonus rather than a necessity. If we have no culture why would anyone want to engage, invest or live here."

"We must put more funding and importance into our Culture & Heritage. It is who we are and is a small price tag to have an effective difference in the quality of our lives."

"It's easy to say that culture is valued and yet do little to support the infrastructure."

"Arts, heritage and culture isn't particularly appealing to younger people. Caters more for older generation."

"...the States needs to help invest as much as possible into new reasons for youngsters to stay in the island."

"Given the current economic climate arts, heritage and culture should not be a priority."

"We would love to go to the opera house or arts centre to see a show but we cannot afford it. The library is a godsend."

"Please consider the value of the arts and heritage to our quality of life and wellbeing, plus they are a factor in helping to attract and keep young skilled people..."

¹² All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses.
159 respondents said they didn't know how Jersey was currently performing against this outcome.

Islanders live healthy lives and risks to health are reduced

Why is this outcome important?

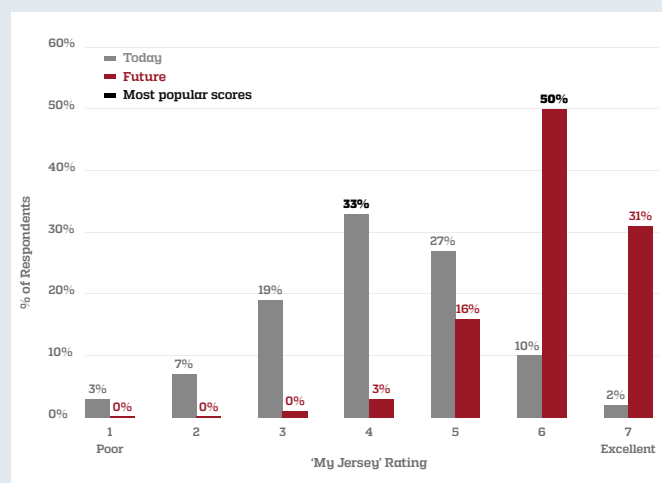
Good health is an indispensable aspect of our wellbeing and quality of life. This outcome is about improving the health of all Islanders, giving them the opportunity to live longer and healthier lives. It is about keeping Islanders healthy, ensuring that health care and support can be targeted to those who need it most.

Today



Overall, more people held positive (39%) than negative views (29%) of Jersey's current progress.¹³

The most popular score was a 4.



Future

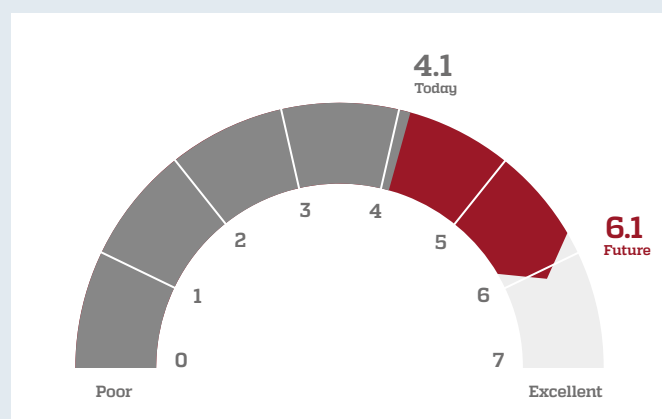
50% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.1, whilst the average score for Jersey's future ambition was a 6.1.

There was particular concern at the growing impact of obesity, high alcohol consumption, drugs, smoking and stress on the cost of health care.

Whilst some felt people should have complete freedom over their lifestyle choices, others challenged whether health care for people who failed to take adequate care of their own health should then be funded by the community. Many also commented, however, on the perceived cost of a 'healthy lifestyle'.



"We should be doing far more to prevent issues such as obesity, poor mental health, smoking and alcohol related health problems etc... rather than allowing them to develop and then spending millions treating the problem."

"If people eat unhealthily, choose to smoke or drink to excess do we as a community have an obligation to ensure they are treated?"

"Having one of the largest alcohol problems in Europe is not acceptable."

"Mental health support services are difficult to access. Thresholds are too high, people have to wait until they are in a critical state to access them."

"People need to take responsibility for their health behaviours. People complain about a nanny state telling them what to do. I don't see why I should pay for their health care because they choose not to listen."

"Ultimately, each individual has the choice over how much they eat, exercise and drink but each individual's choice will, eventually, impact upon the health service."

"In an ideal world everyone would make sensible lifestyle choices but realistically this isn't the case; nor should it be enforced."

"Fresh produce far too expensive, even if grown locally."

¹³ All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses.
¹⁸² respondents said they didn't know how Jersey was currently performing against this outcome.

Islanders have access to good quality health care

Why is this outcome important?

This outcome is about ensuring that people get the right care, of excellent quality, at the time of need.

Today



An outright majority (51%) were positive about Jersey's current progress.¹⁴

The most popular score was a 5.

Future



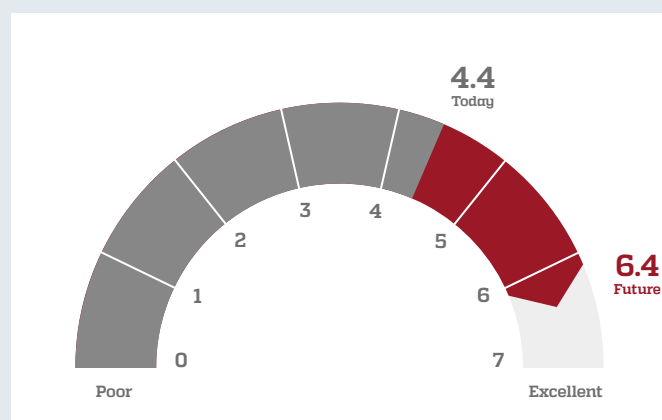
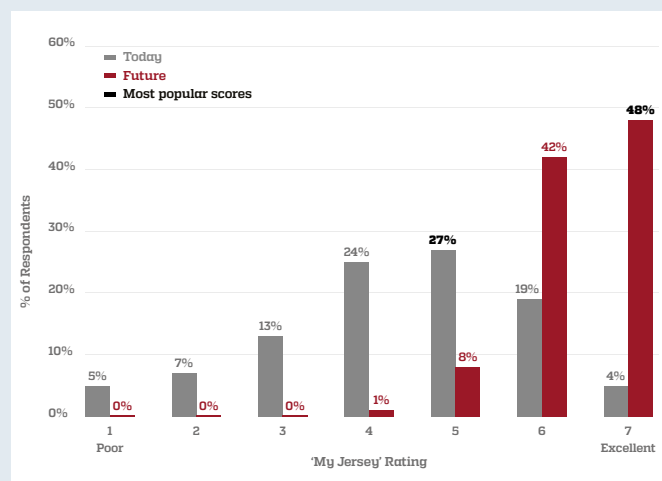
This was one of the highest-rated outcomes for the future with 48% of respondents saying Jersey's long-term ambition should be a maximum 7.

It was one of the seven outcomes where 90% or more of respondents said they would be happy with a 6 or 7 in the future.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.4, whilst the average score for Jersey's future ambition was a 6.4.

Scoring of Jersey's current position reflected concern at the cost of primary care and the capacity of the General Hospital in the face of increasing demand and the need for improved mental health services. Several concerns were raised regarding patients bearing the cost of travelling to receive treatment that wasn't available in Jersey and also issues around funding for long-term care.



"...many avoiding GPs because of cost and ending up in A & E with much more serious health problems than initially showed and could have been treated earlier."

"Everything to do with health in Jersey depends on your ability to pay."

"Jersey needs to vastly improve access to mental health care services."

"It is very expensive to be ill, as the GP fees are so expensive. Goodness, you do not want to be ill at the weekend and have a 'call out'."

"Well done to doctors who don't charge for children."

"I live with a long-term health problem and recently I have found that care is being reduced. Why cuts to the services and funding? My health problems don't receive cuts."

"...I understand why Jersey can't provide all treatments on island but you are penalized with certain illnesses by having to pay [to travel] to receive them."

"The cost of going to see the doctor and dentist is too high and as a result people are neglecting their health and dental needs."

"I work for a charity and receive just above minimum wage (my choice) going to the doctor would set me back roughly a day's wage."

"I think the charities like Les Amis, Strathmore etc are brilliant and keep people with problems in an organised structure to help them become independent yet safe."

¹⁴ All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 97 respondents said they didn't know how Jersey was currently performing against this outcome.

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

Why is this outcome important?

Along with other Islanders, disabled people aspire to a good life. However, they also face huge barriers to achieving the life that so many take for granted. These barriers are created when we build a society that takes no account of the impairments other people have.

Today

44%
Positive

Although a quarter didn't know how Jersey is currently doing, more of those respondents who did express an opinion held positive (44%) rather than negative views (31%).¹⁵

The most popular score was a 5, although more than one in four scored current progress as a 4.

Give the large proportion of 'don't know' responses, this figures as one of the lowest ranked outcomes based on the total number of people rating Jersey's current performance positively.

Future

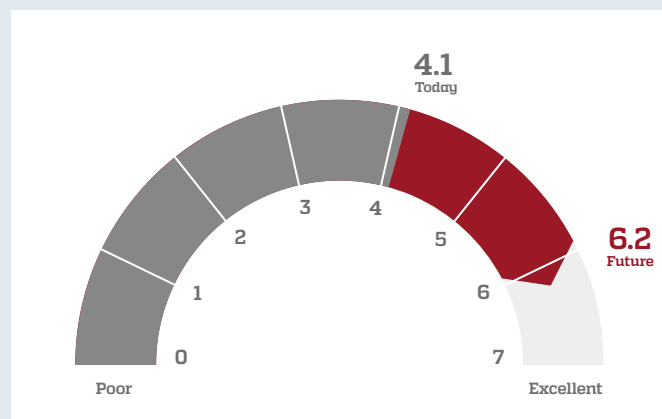
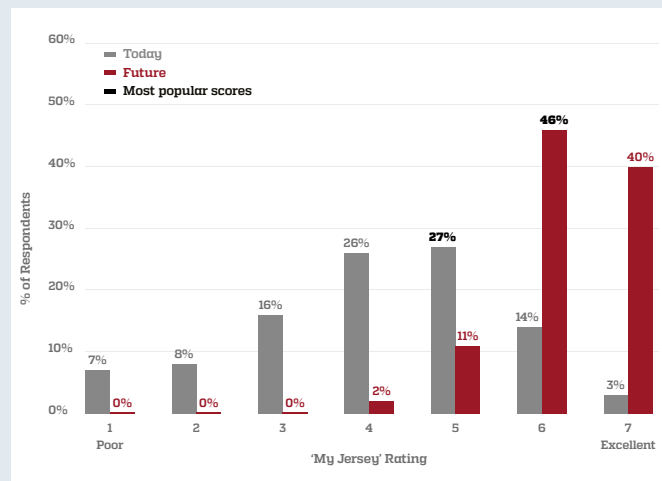
46% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.1, whilst the average score for Jersey's future ambition was a 6.2.

This represents one of the largest gaps to close between perceived current performance and future aspirations. This was clearly influenced by the lack of awareness about how Jersey fares on this outcome. Raising awareness and understanding is an issue in itself if we want to fulfil Islanders' stated ambition to build a community that is more inclusive of people living with impairments.

Comments highlighted particular problems relating to transport for disabled people, resulting in isolation, inability to access services or high costs for many. The role played by charities was highly valued but inconsistencies in service provision and discrimination were also highlighted as concerns.



"Our income support and long-term care models are so complex, not even the people we turn to for guidance fully understand."

"There is so much amazing support from different organisations here for people with long-term health conditions or disability."

"There needs to be adequate provision for respite for families who are caring for elderly or disabled family members."

"... extra time and funding is needed for help with special needs for diagnosis and then help in the classroom."

"I am trapped at home with no transport. This is not a quality of life."

"Islanders like me cannot travel easily - wheelchair used when out and hiring a taxi is just too expensive."

"...transport to/from hospital appointments or activity groups are difficult for islanders who do not drive."

"There is no protection for disabled people being victimised in the work place as I have been."

"Disability discrimination laws are needed."

"I work with people who have a disability/health condition and there are many issues which lead them to having lower quality of life i.e. very limited access to services and transport."

¹⁵ All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 1,040 respondents said they didn't know how Jersey was currently performing against this outcome.

Islanders can independently afford a decent standard of living

Why is this outcome important?

The quality of life for Islanders is influenced by the cost of essential goods and services required to meet their basic needs and participate in society. Low income households spend a greater proportion of their income on everyday essentials compared with better-off households so their standard of living is more sensitive to the cost of these goods and services and the shock of price rises.

Today

55%
Negative

This was the only case of an outright majority (54%) being negative about Jersey's current progress.¹⁶

The most popular score was a 4.

It follows that this was also the lowest ranked outcome based on the total number of people rating Jersey's current performance positively.

Future

48% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

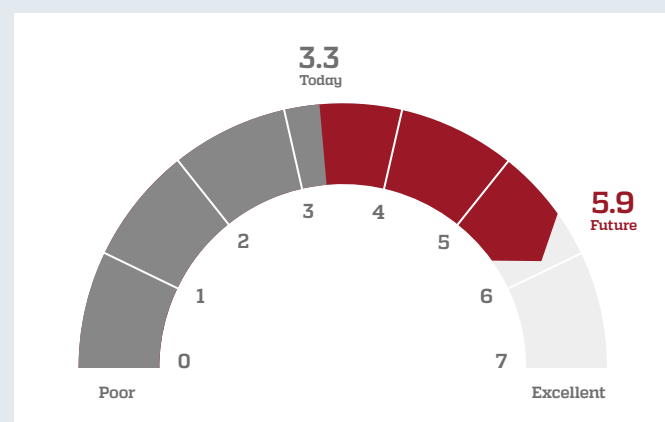
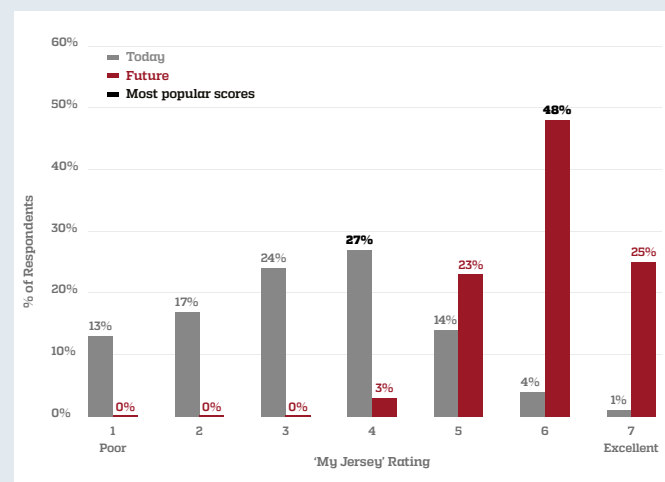
Nearly a quarter considered 5 to be a realistic target. Two-thirds of the respondents who set 5 as the future target had scored Jersey's current position as a 3 or less.

Closing the gap

On average, Islanders scored Jersey's current progress as a 3.3, whilst the average score for Jersey's future ambition was a 5.9.

Despite being one of the lowest aspirational target scores, this still represents the largest gap to close compared to perceived current performance.

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



"Many often struggle to afford essentials."

"We can't afford holidays... and the cost of living has increased faster than my mum's wages. It's sad as she works so hard."

"It's very difficult for young people to find affordable rental accommodation hence they leave the island"

"Food still much more expensive than the UK."

"Too many businesses pay minimum wage, living wage should be the norm..."

"...my boyfriend and I both work full time earning the 'average' Jersey salary and are struggling to get on the property ladder, or afford to have children. Sometimes it feels like we would be better off on benefits!"

"There will soon be a generation of pensioners who do not own their own home and cannot afford rent..."

"You can not get married, buy a home and start a family straight away, you have to make a choice, it's family or property."

"I now shop online as my margins are so tight I can't afford what the high street is charging."

"Those who cannot afford to buy are penalized hugely by the cost of rental accommodation."

"Help for the aged is an expensive undertaking and will get worse with the growing retired population who rely on States pensions."

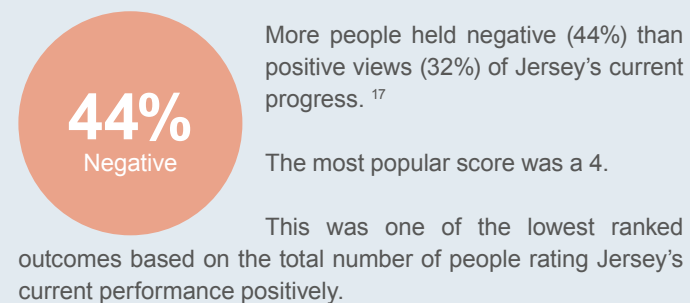
¹⁶ All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses.
139 respondents said they didn't know how Jersey was currently performing against this outcome.

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

Why is this outcome important?

This outcome is about helping and caring for the most vulnerable in our community, ensuring provision is adequate to meet their needs and, where appropriate, giving people the opportunity and means to help themselves. A key role of government is to help provide and coordinate support to help people and families find jobs, cope with shocks, help manage costs that are beyond the control of individual households and protect the ageing population.

Today



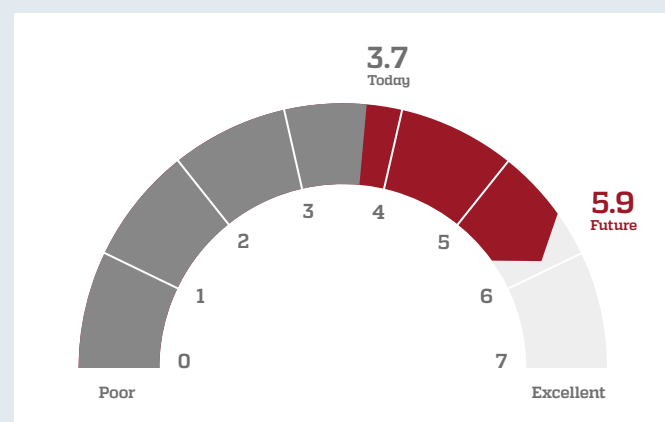
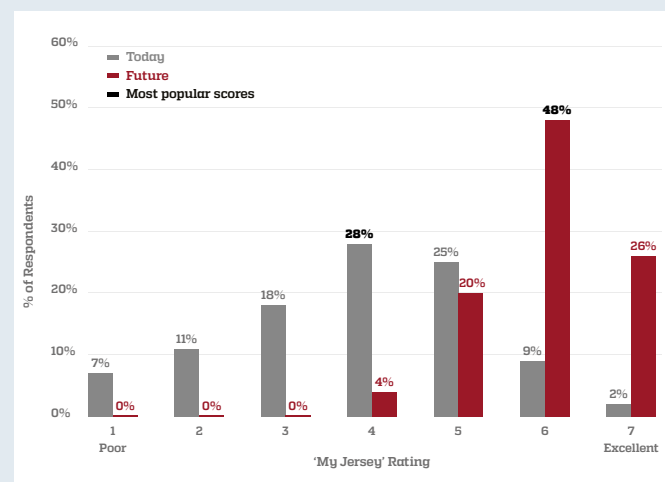
Future

48% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 3.7, whilst the average score for Jersey's future ambition was a 5.8. This was the lowest aspirational target score but still represents a significant gap to close compared to perceived current performance.

The comments highlighted the challenges faced by government in addressing this issue. Many people acknowledged that people in genuine need should receive support but were convinced that the benefits system supported too many people who did not deserve it. On the other hand, others who were working but still needed income support felt unfairly stigmatised. Many people wanted government to do more to address costs that are beyond the control of individual households, such as housing.



"Everything should be means tested including bus passes for OAPS as there are young families who need them far more than those older folk who can more than afford to pay their own bus fare."

"Jersey is an expensive place to live. There is no easy solution to that but the States could do things to limit the costs of living which means less pressure to earn to survive."

"Currently it feels like that the only housing being built is for the wealthy."

"Too often the view is support should come in the form of financial aid. This is too easy an option and is the least useful for those who need time and guidance invested in them in order to make the right choices."

"We need a living wage so taxpayers are not subsidising employers."

"I would consider myself a good earner but even I would struggle to afford children and a house with a garden, parking etc. Whereas people on income support etc are helped to achieve this."

"More genuinely affordable starter homes for first time buyers are required."

"My 50 year old husband has to work as a general labourer on a building site and has to work 50 hours plus at £7.78 an hour and for his hard graft just has enough to pay the rent and left with not enough to live on. It annoys us as we have to rely on income support... Unfortunately there tends to be a negative attitude towards people on income support. They are seen to be scrounges and bone idle I know this not to be so."

"Everybody should be contributing to our society. Some people should be entitled to benefits and aided but I have watched families through the generations be dependent on benefits."

¹⁷ All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 612 respondents said they didn't know how Jersey was currently performing against this outcome.



Environment

Our environment underpins every aspect of our lives. Clean air, water, the quality of our homes and the appeal and attraction of our surroundings are all vital to our health, wellbeing and quality of life.

The beauty and diversity of our natural environment is internationally recognised and key to Jersey's appeal as a place to live and visit. As our population and economy grow and change we must consider how we use our resources. Also we must prepare for the emerging impact of climate change.

The Environment section comprises three strategic goals.

BUILT & HISTORIC ENVIRONMENT

NATURAL ENVIRONMENT

SUSTAINABLE RESOURCES

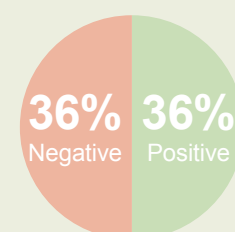
These goals break down into a total of 12 more detailed outcomes.

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

Why is this outcome important?

The town of St Helier is the engine of Jersey's economy and, for most of us, the place where we work, live or socialise. We need to ensure that St Helier and its environs is a liveable town, offering pleasant and stimulating public places for people to pass through and visit; that it is a social town, with inclusive places for community and cultural activities and for people to meet; and an economically vibrant town, where local business is well-connected to its customers.

Today



Opinion was equally divided on current progress with 36% expressing both positive and negative views.

The most popular score was 4.¹⁸

This was one of the lower ranked outcomes in terms of the number of respondents scoring Jersey positively.

Future

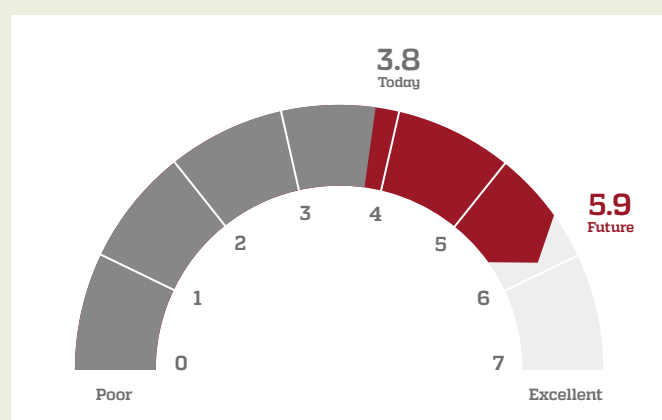
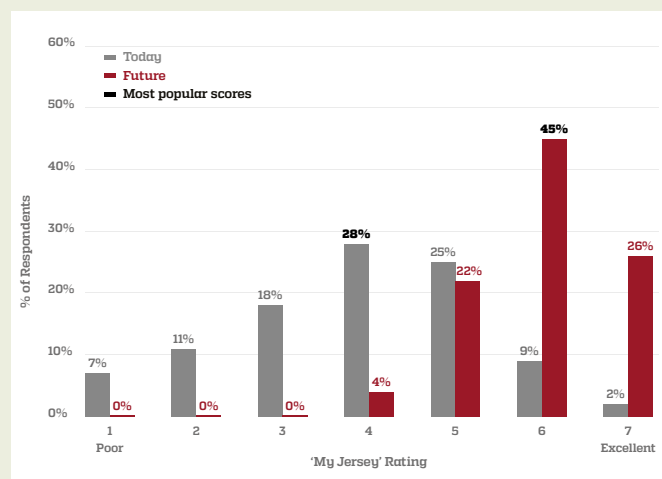
48% of respondents thought Jersey's long-term ambition should be a 6.

Closing the gap

On average, Islanders scored Jersey's current progress as a 3.8, whilst the average score for Jersey's future ambition was a 5.9.

Whilst the aspirational target score was one of the lowest, this still represents one of the larger gaps to close compared to perceived current performance.

Comments highlighted how issues such as quality urban design, improved public spaces and better traffic management all represent opportunities to improve the town. There were also concerns about the future of retail, St Helier becoming a bland copy of other high streets, and a desire for an improved cultural offer making St Helier a more interesting town to visit. Many people also felt intimidated by the level of drunkenness in St Helier in the evening and at weekends.



¹⁸All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses.
152 respondents said they didn't know how Jersey was currently performing against this outcome.

"St Helier is totally spoilt, disjointed, chaotic. Not enough care has been given to developing our own future heritage with architectural designs lifted straight from places in UK."

"St Helier is becoming old and tired, is out of date and scruffy."

"Rent is WAY TOO EXPENSIVE for St Helier to be vibrant with local small businesses so we only get high street brands like anywhere else in the world, make it small local and unique."

"Please cordon off more for pedestrian use. St Helier so much more enjoyable without noise & pollution of traffic. Please implement cycle paths."

"The Waterfront is an embarrassment."

"Take a guide off Singapore and factor in much much more trees and vegetation. Have trees in centre of roads. Have wall gardens and roof top gardens."

"Too expensive, no atmosphere and little parking. Where is the live music and entertainment for visitors."

"Planning restrictions are too tight in Jersey to allow for architects in Jersey to have any creativity and procure interesting buildings."

"...where is the forward thinking plan for places like Colomberie? We should have a sequence of regeneration projects, big and small, planned for the next 20 years."

"Controlling traffic and green spaces are vital in town and preserving what unique character is left."

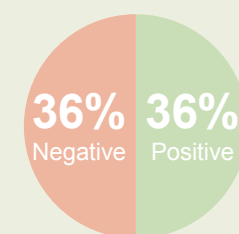
"The desire to concentrate new development and housing in St Helier needs to be balanced against the provision of quality open space and facilities."

Jersey's built environment provides quality homes and neighbourhoods

Why is this outcome important?

A place to call home is central to how we live. It is fundamental to our need for comfort, security and stability. It affects our health and wellbeing, and it encourages us to participate in economic and social life, contributing to our sense of identity and attachment to the community around us.

Today



Opinion was equally divided on current progress with 36% expressing both positive and negative views.

The most popular score was 4 out of 7.¹⁹

This was one of the lower ranked outcomes in terms of the number of respondents scoring Jersey positively.

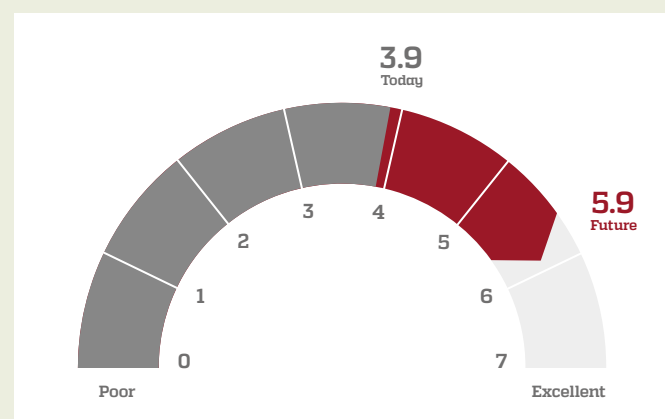
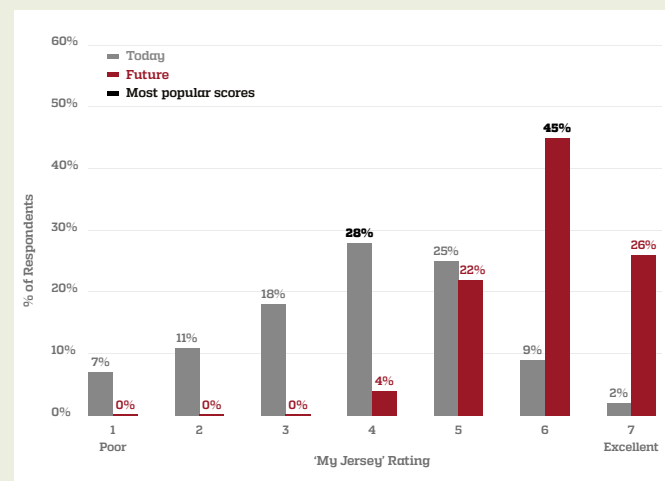
Future

48% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 3.9, whilst the average score for Jersey's future ambition was a 5.9. Whilst the future ambition was relatively low, the level of change required to achieve it was higher.

Comments reflected a strong body of opinion that home ownership was increasingly out of reach for many people. This, in turn, meant more people were reliant on a private sector rental market where costs and standards were repeatedly challenged. By comparison, the improving quality of social housing was frequently appreciated. Accommodation for people without residential qualifications came in for strong criticism. Strong concerns were also expressed regarding minimum room size standards and build quality.



"Homes need properly enforced minimum standards to ensure they aren't just minimal boxes."

"Seen disgusting accommodation, especially for non-qualified."

"There isn't enough done to control the standard of accommodation from private landlords with quite a few being barely habitable and most over charging for rent."

"We have failed for many years to provide decent homes in Jersey. The link between poor quality homes and poor health is indisputable, and yet we still have not addressed this!"

"Sensible minimum room sizes should be enforced."

"Too many people stuck in substandard housing, particularly migrants."

"...there has been a huge improvement in housing estates and States housing improvements. I feel the private sector rentals are where it is let down."

"The island seems to be constantly building new homes but they are tiny and barely adequate for comfortable living. Make the rooms a decent size for the people living in them."

"More shared equity parish schemes, more affordable housing at realistic prices for young people."

"Although I earn what I think to be a good wage, it is impossible for me to afford a nice flat which isn't full of damp or a bedsit."

"Deal with buy to let and offshore investors in accommodation... Housing is not an investment it is a human right."

"People don't want to be crammed into little flats that have massive rents. House purchase is beyond most people's ability and private rentals are expensive..."

¹⁹All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 166 respondents said they didn't know how Jersey was currently performing against this outcome.

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

Why is this outcome important?

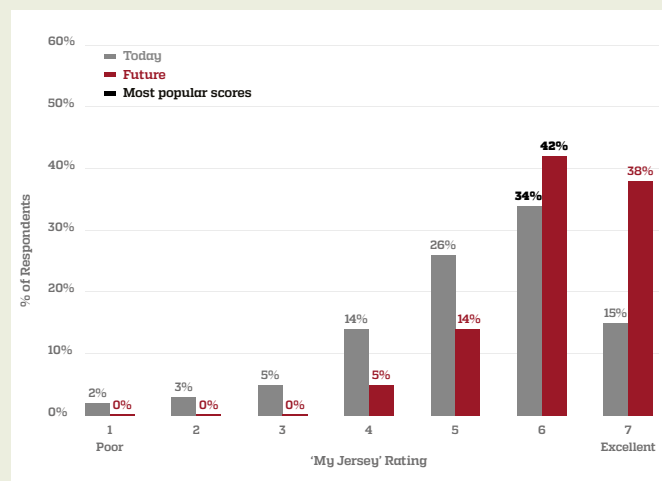
Our historic environment helps to define our Island and it is a key building block for a successful future for Jersey. The historic environment of Jersey and the many who are contributing to its conservation and development are playing an important role in economic growth, tourism, sustainable development and regeneration.

Today

75%
Positive

An outright majority (75%) rated Jersey's current progress positively.²⁰

This was one of just four outcomes in the survey where the most popular score for Jersey's current progress was a 6.



Future

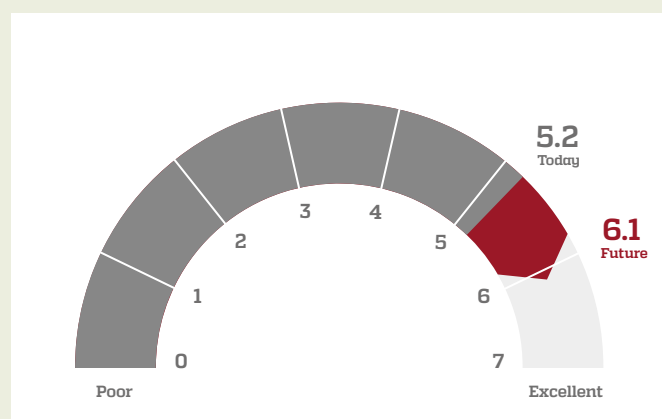
42% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 5.2, whilst the average score for Jersey's future ambition was a 6.1. This is one of the areas where the gap between people's perceptions of where Jersey is today and their future aspirations is closest.

This was one of the outcomes where Islanders held the most positive views and the comments reflected a strong desire to protect Jersey's heritage.

Some comments reflected concern that investment was suffering as financial pressures increased and cynicism that a focus on profit would invariably trump heritage. There was also concern that current development was doing little to add to the Island's architectural heritage but also some sense that a more pragmatic approach might be required with regard to conservation issues. The merits of preserving certain buildings and allowing environmental improvements to listed properties featured frequently.



"Jersey's heritage is its soul. Take care of the mind, look after the body, but nurture the soul."

"There needs to be more done to protect the island's heritage. Unfortunately too much money & greed involved."

"I think town should have a lot more Jersey heritage about it otherwise it's just a soulless place that's the same as anywhere."

"...more needs to be done by the government to show they value our history and think long-term about protecting it."

"Jersey Heritage and National Trust do a great job."

"...our laws to protect the historic and natural environment need strengthening not weakening to reduce 'red tape'."

"It would be good to make it easier to install energy efficiency improvements such as double glazing into historic buildings to help keep them warm."

"Most historic buildings are well protected, but why live in the past? If the same care was put into the buildings being built now then they wouldn't be so hideous."

"Many WW2 sites have been damaged in recent times including some very important ones and many others are not being maintained, these sites would be very significant for the tourism industry if managed properly."

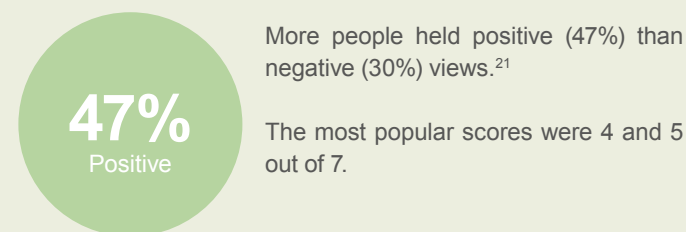
²⁰All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 144 respondents said they didn't know how Jersey was currently performing against this outcome.

Islanders can travel around Jersey easily

Why is this outcome important?

Transport is important to all of us. Maintaining and improving the performance of our transport system can not only deliver a better quality of life in our Island but also result in real financial benefits through reductions in congestion, pollution, road injuries and health problems caused by low levels of physical activity.

Today



Future

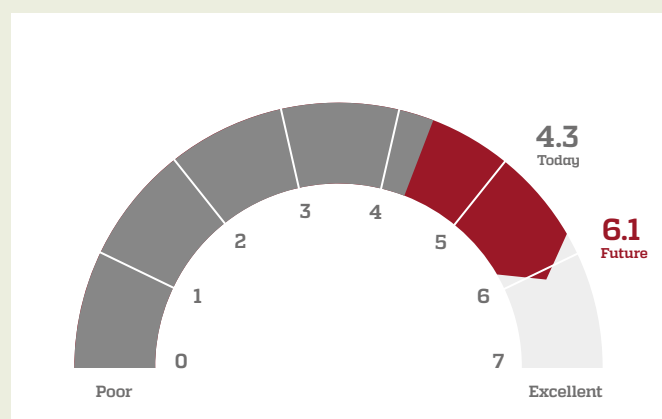
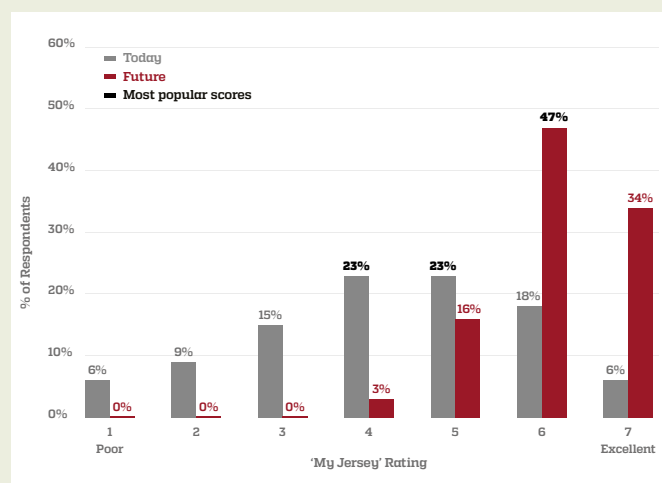
47% of respondents thought Jersey's long-term ambition should be a 6.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.3, whilst the average score for Jersey's future ambition was a 6.1.

Although the overall view on transport was positive, the issue generated considerable comment. Despite recognition that public transport has improved, it was often perceived by many respondents as expensive and limited in terms of connectivity, accessibility and frequency of service.

There is also concern that provision for cyclists and pedestrians needs to improve. Perceptions of road safety were a significant deterrent to cyclists. In the absence of improved public and active travel options, many regard the car as the only viable means of transport in Jersey.



"It really is time you sorted out that Transport Policy and came up with some radical solutions that people could get excited about."

"...stop prioritising private vehicles and create a joined up public transport network."

"Either the population needs to decrease or taxation on motor vehicles / petrol needs to increase massively to incentivise public transport or cycling."

"The way the bus routes are organised makes getting around the island difficult."

"It would be good to travel from east to west on a single bus or at least a single ticket."

"Taxis and buses are very expensive."

"...make the cycling safer and more will do it. Have pavement for walking that covers the major walking routes into town for those within a 30 minute walk and more will do it."

"The bus service seems to have improved but KEEP going. We should be the envy of the world re public transport."

"Islanders are effectively encouraged to use their cars as the transport is so bad."

"Buses not regular enough to remote locations and not enough cycle paths to make that a safe means of transport."

"I have a good bus route but many people have no buses at all within walking distance."

"More safer and clearly marked cycle paths may encourage more people out of cars and ease traffic."

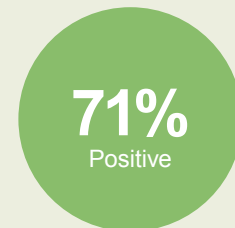
²¹All figures represent the proportion of respondents who expressed an opinion and therefore don't include the 83 respondents who said they didn't know how Jersey was currently performing against this outcome.

The beauty of Jersey's countryside and coast is protected

Why is this outcome important?

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

Today



An outright majority (71%) rated Jersey's current progress positively.²²

This was one of just four outcomes in the survey where the most popular score for Jersey's current progress was a 6.

Future



An outright majority (53%) of respondents said Jersey's long-term ambition should be a maximum 7 out of 7. There were only two other examples where more than 50% of people set their future ambition as a 7.

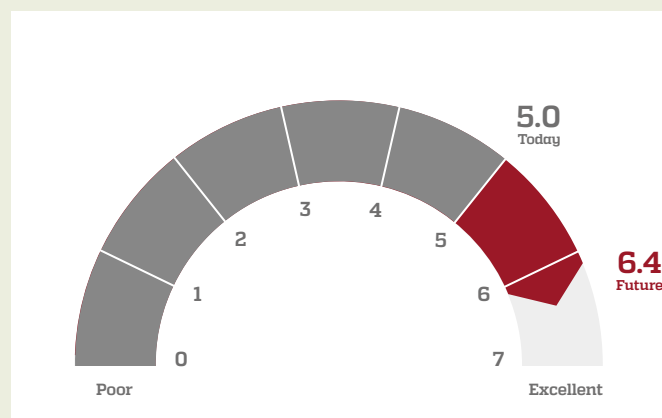
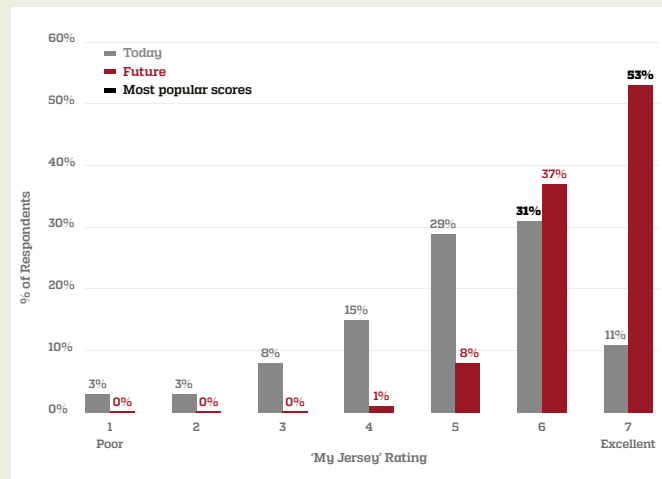
This was also one of the seven outcomes where 90% or more of respondents said they would be happy with a 6 or 7 in the future.

Closing the gap

On average, Islanders scored Jersey's current progress as a 5, whilst the average score for Jersey's future ambition was a 6.4. So, whilst current progress was rated very positively, the aspiration for the future was set definitively high.

On paper, this is one of the narrowest gaps between current progress and future ambition. Comments reflected the value people place on the beauty of Jersey's countryside and coast but the comments also reflected concern that increasing challenges would drive Jersey backwards rather than closing the gap.

Concern was frequently voiced that 'the jewel in Jersey's crown' is at risk from inappropriate development, and over-development, particularly in coastal areas. The survey highlighted perceptions that there is widespread development of green fields and that the Green Zone is being eroded. A lot of mistrust regarding the perceived relationship between government and developers was evident.



"Once it's gone, it's gone... We need to appreciate how fragile and precious our environment is and understand it is what makes our island unique."

"Thank God for the new Jersey National Park. We aren't bad but we could do so much better..."

"The environment of Jersey is the true gem of the island (alongside the culture of generosity and kindness) and its protection cannot be overrated"

"Views of the coast should not be obstructed so that the only people able to enjoy them are the inhabitants of the properties. The coast is vital to the context of living on an island and part of our heritage."

"Our lush and green island looks beautiful all year round but looks can be deceiving. The use of pesticides is shocking and a huge concern and it's sad and wrong!!"

"This job is generally left to charities and non-profits. It needs more support from the States. It is the most precious asset Jersey has and one that will keep bringing people to the island as tourists or residents. Once we have wrecked it, it will be gone and will never come back."

"The island is only 9 by 5. There is not infinite space for people, buildings etc. A time will come, unless very heavy controls are introduced and profit put aside when we will have no island left for our children."

"Money talks...headlands disappearing to luxury houses...this is a disgrace."

"More building homes in town sites and less in countryside, as there'll be no countryside left in 2036!"

²²All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 144 respondents said they didn't know how Jersey was currently performing against this outcome.

Jersey's marine environment is protected

Why is this outcome important?

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

Today

67%

Positive

An outright majority (67%) rated Jersey's current progress positively.²³

The most popular score was a 5 out of 7.

Nearly one in six people said they didn't know how Jersey was doing against this outcome.

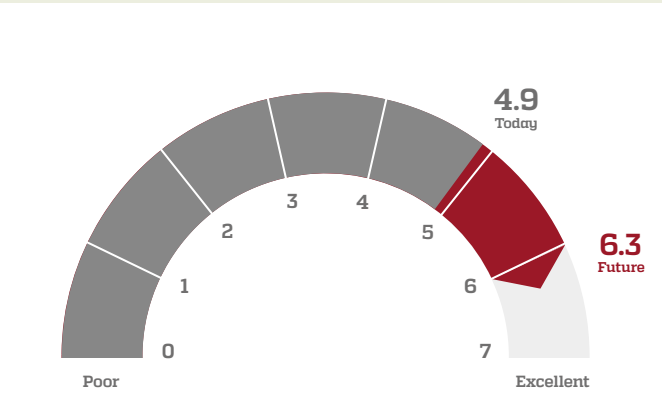
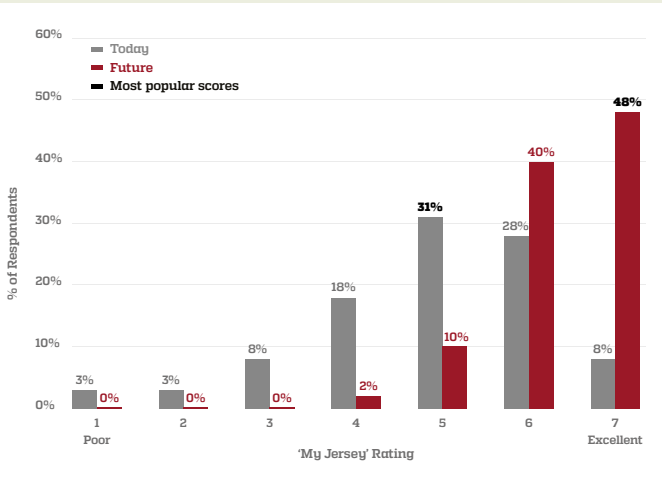
Future

This was one of the highest-rated outcomes for the future with nearly half (48%) of respondents saying Jersey's long-term ambition should be a maximum 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.9, whilst the average score for Jersey's future ambition was a 6.3. So, whilst current progress was rated very positively, this was another environmental outcome where the aspiration for the future was set high.

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



“As an avid fisherman I have seen a massive decline in fish in local waters. This is due to commercial fishing. It seems the easy option of restricting recreational fisherman which has nominal impact but makes good headlines is in force. Address the true problems please.”

“The keeping of undersized species for fishermen (especially recreational) a huge problem but not surprising considering I have never seen an official when fishing myself. Why aren't there sign posts giving warnings about catch sizes and limits on the major piers. Australia have these everywhere...”

“The green seaweed is by far the most obvious feature that lets down our island. It smells and looks awful and it borders our town! Instead of finding ways of clearing it up, we need to address the pollution from pesticides etc that is causing the issue!”

“Can anything be done about plastic in the marine environment?”

“As a keen diver, I see the horrific damage we allow to go on in and around our beautiful island, out of sight out of mind. Take scallop dredging as an example, would you go to the apple orchard and cut down all the trees to collect the apples? NO.”

“Stop the trawling of our seabed for scallops which destroys the habitat for all marine creatures.”

²³All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 717 respondents said they didn't know how Jersey was currently performing against this outcome.

Jersey's wildlife, plants and habitats are protected

Why is this outcome important?

Despite its relatively small size, Jersey is highly prized for its rich and diverse habitats. The variety of the Island's landscape supports a myriad of wildlife and the particular mix of wildlife is unique. Jersey's geographical position and favourable climate allows many species normally restricted to either Britain or the European continent to extend their range, resulting in an overlapping mixture of animals and plants found only in the Channel Islands.

Today

72%

Positive

An outright majority (72%) rated Jersey's current progress positively.²⁴

The most popular score was a 5 out of 7, but nearly a third of respondents also gave this outcome a 6.

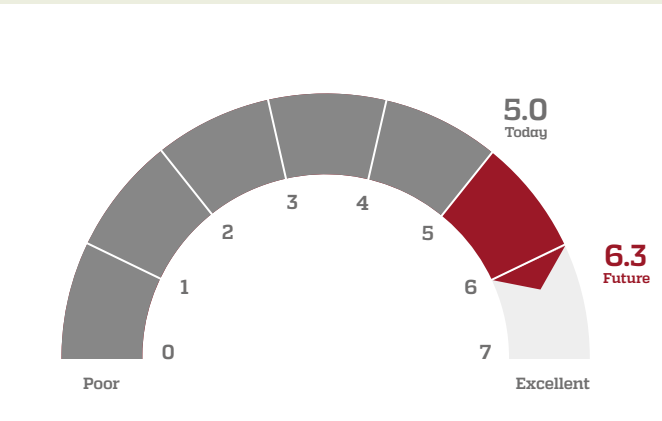
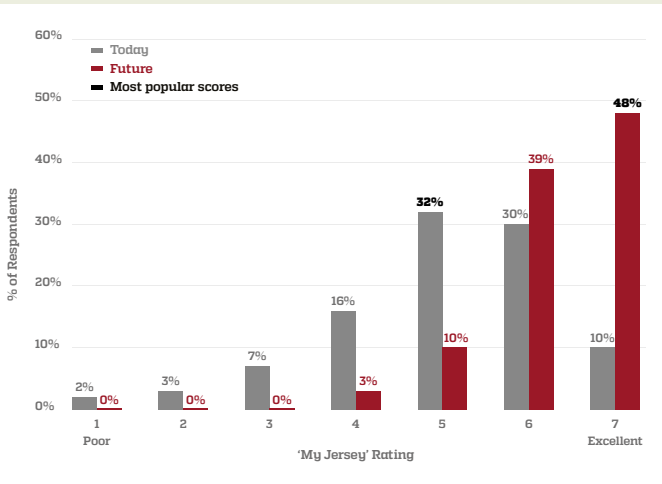
Future

This was one of the highest-rated outcomes with nearly half (48%) of respondents saying Jersey's long-term ambition should be a maximum 7 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 5.0, whilst the average score for Jersey's future ambition was a 6.3. Whilst the aspiration for the future has been set high, the gap between current progress and future ambition was one of the narrowest.

Although the overall view was very positive, the comments reflect a concern that, rather than getting closer to the long-term ambition, Jersey may be losing ground and that significant challenges lie ahead. They highlight fears over the vulnerability of Jersey's biodiversity, the impact of intensive farming practices and whether Jersey's wildlife is currently in decline.



²⁴All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses.
489 respondents said they didn't know how Jersey was currently performing against this outcome.

“Pesticides are destroying our natural fauna. I don’t see toads or bees much at all compared to before intensive potato farming took hold.”

“Visitors value Jersey’s wildlife, plants and habitats more highly than many politicians, which we will all live to regret.”

“Soil health is not on the agenda, we are all dependent on it and our failing system is showing itself with green sea lettuce and poisoned reservoirs..”

“Jersey hedgerows have lost a lot of the wild flowers that were around when I was a kid you used to see foxgloves on most hedges, now they are a rarity.”

“We fool ourselves into thinking that agriculture is the custodian of the environment. This is not borne out by the facts. Our water is poisoned, ditches have been ploughed out. Hedgerows are neglected and then decimated at the most critical times of the year with mechanised branchage. We then wonder why fields flood and insects and song birds are diminishing. The whole thing needs a rethink...”

“Birds on the Edge project and restoration of coastal biodiversity is an excellent example of what can be done and needs to be encouraged.”

“Jersey used to have much more wildlife and it is disappearing fast.”

“The budget available to protect Jersey’s semi-wild areas, including coastal landscapes, carry out endangered species conservation projects... in no way reflects the importance of the Island’s natural environment.”

“Need to stop the felling of so many trees & the removal of hedgerows, which play a very important part in the protection & habitat of our wildlife.”

Jersey's air is healthy to breathe

Why is this outcome important?

It is estimated that air pollution in the UK reduces the life expectancy of every person by an average of 6 months. It is easy to take the quality of Jersey's air for granted but it is a key aspect of our quality of life.

Today



An outright majority (77%) rated Jersey's current progress positively.²⁵

This was one of just four outcomes in the survey where the most popular score for Jersey's current progress was a 6.

Future



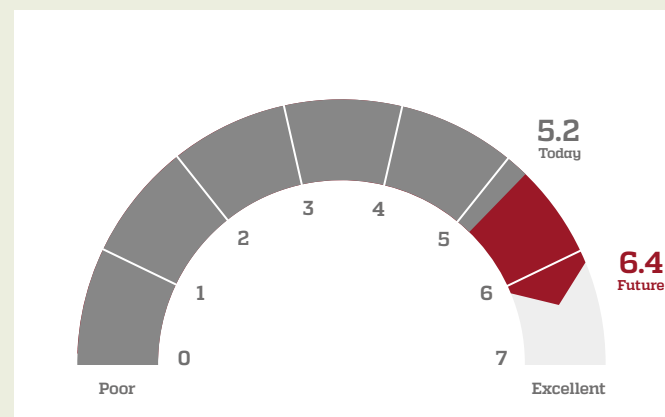
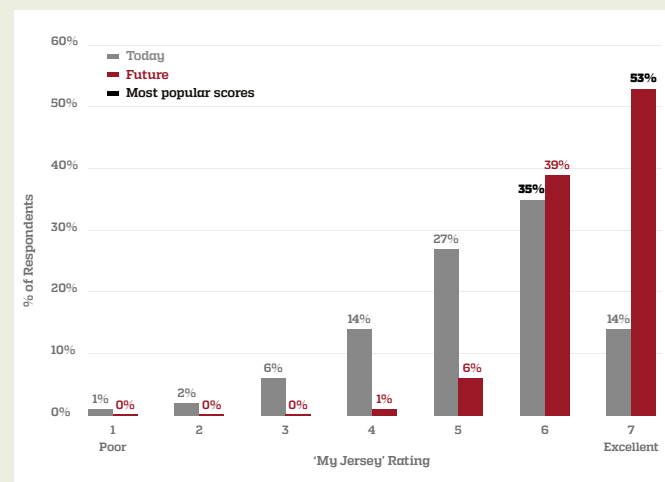
An outright majority (53%) of respondents said Jersey's long-term ambition should be a maximum 7 out of 7. There were only two other examples where more than 50% set their future ambition as a 7.

This was also one of the seven outcomes where 90% or more of respondents said they would be happy with a 6 or 7 in the future.

Closing the gap

On average, Islanders scored Jersey's current progress as a 5.2, whilst the average score for Jersey's future ambition was a 6.4. This was one of the narrowest gaps to close, reflecting the natural advantages that Jersey enjoys as a wind-blown island surrounded by the sea.

Although the overall view of air quality was overwhelmingly positive, the comments highlighted where some respondents perceive opportunities to improve. There was a body of opinion that pollution caused by traffic, particularly in St Helier, must be addressed (although there was no significant difference in perceptions of Jersey's air quality between St Helier residents and other Islanders). There was also concern at emissions standards of older vehicles and reassurance is required regarding emissions from the Energy from Waste Plant.



“Air quality in St Helier is very poor due to the amount of standing traffic at rush hour.”

“Air quality is fantastic compared to most places.”

“Whilst we are lucky with our air in Jersey, more cars/ motorbikes need to be pulled in for their awful black smoke emissions.”

“Jersey would be the perfect place to discriminate against the internal combustion engine and in favour of electric vehicles.”

“Annual vehicle testing would improve emissions and then air quality.”

“Less than 10 public charging points is no way to push electric vehicles in a place where petrol & diesel engines are the main cause of poor air.”

“We need to look at reducing cars on the roads by making it easier to walk and cycle as part of everyday life. Then the air quality will improve.”

“Try living in London in the heat of the summer with traffic or Tokyo then you know what bad air smells and feels like to breathe.”

“St Helier has terrible air quality and should be pedestrianized further (i.e Halkett place) with reduced traffic measures.”

²⁵All figures represent the proportion of respondents who expressed an opinion and therefore do not include the 267 respondents who said they didn't know how Jersey was currently performing against this outcome.

Jersey's fresh water resources are clean and sustainable

Why is this outcome important?

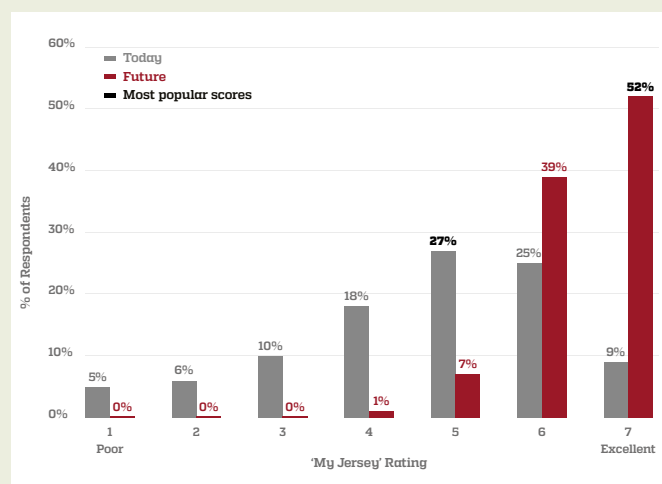
Water is a precious resource, particularly on a densely populated island. Everyone has an important part to play in safeguarding it for human use and protecting the important habitats and species that depend on it.

Today

61%
Positive

An outright majority (61%) rated Jersey's current progress positively.²⁶

The most popular score was a 5 out of 7.



Future



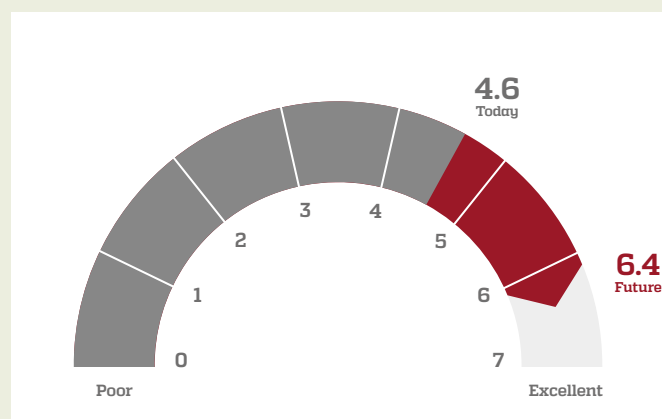
An outright majority (52%) of respondents said Jersey's long-term ambition should be a maximum 7 out of 7. There were only two other examples where more than 50% set their future ambition as a 7.

This was also one of the seven outcomes where 90% or more of respondents said they would be happy with a 6 or 7 in the future.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.6, whilst the average score for Jersey's future ambition was a 6.4.

For one of the outcomes where Islanders have set the highest level of future ambition, this represents one of the biggest gaps to close. The comments highlight why, with widespread disquiet at the apparent impact of the farming industry on the quality of Jersey's water supplies. This reinforced concerns that so many properties rely on borehole water.



"I worry about the borehole water my children drink."

"I support farmers and their stewardship of the land, but they should not be allowed to pollute our waters and be subsidised for it."

"What farmers put on their fields to the detriment of our water supply needs to be addressed urgently."

"We have unacceptable level of nitrates in the water but instead of imposing restrictions on farmers or gardeners we propose a £30 million plant. Madness. This is an indirect subsidy for farmers."

"Much more work required to place homes on to mains water and especially mains sewerage."

"Cost of farming induced water pollution not seen as a cost for conventional farmers hence further disadvantaging more organic/ low impact farmers..."

"Non mains water supplies are prone to the effects of poor management of adjacent land and those affected have no means of bringing offenders to account."

"It is simply not acceptable for our water supply to be polluted by anyone let alone an industry which we subsidise."

"New build sites should be made to install grey water installations to save drinking water being used to flush toilets and water gardens."

"If the island keeps growing where will the extra water come from?"

²⁶All figures represent the proportion of respondents who expressed an opinion and therefore do not include the 417 respondents who said they didn't know how Jersey was currently performing against this outcome.

Jersey has secure, affordable and sustainable energy

Why is this outcome important?

Energy underpins almost every aspect of our daily lives. It is easy to take it for granted and treat it as a commodity that will always be able to meet our increasing demands but the well-being of our people and economy depends on a secure, sustainable and affordable energy supply.

Today

42%
Negative

More people held negative (42%) than positive views (31%) of Jersey's current progress.²⁷

The most popular score was a 4 out of 7. Nearly one in seven people said they didn't know how Jersey is currently performing against this outcome.

This was one of the lowest ranked outcomes based on the total number of people rating Jersey's current performance positively.

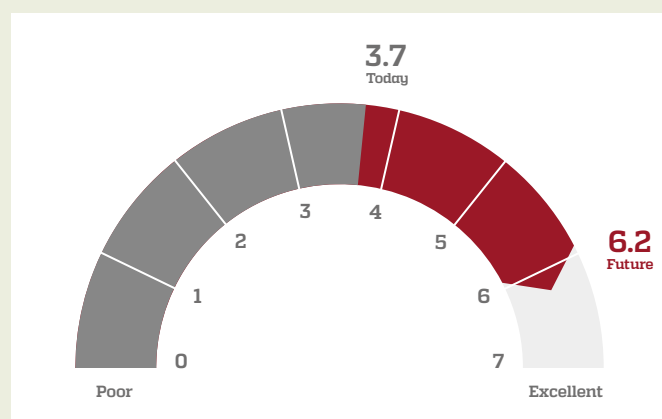
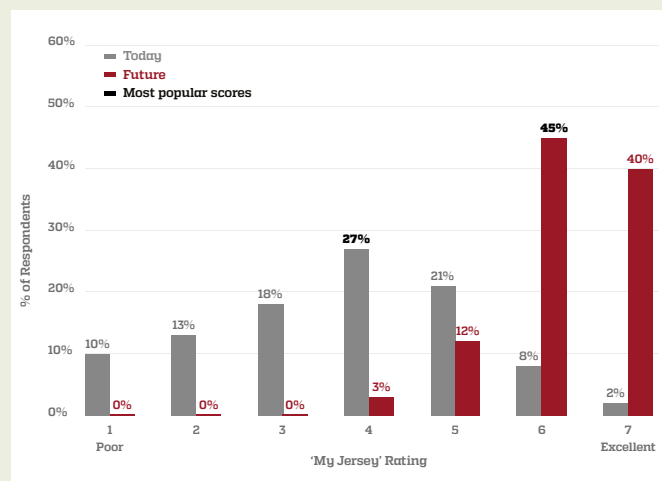
Future

45% of respondents thought Jersey's long-term ambition should be a 6.

Closing the gap

On average, Islanders scored Jersey's current progress as a 3.7, whilst the average score for Jersey's future ambition was a 6.2. This represents one of the largest gaps to close compared to perceived current performance.

The comments on the energy outcome highlighted popular opinion that Jersey should be doing far more to exploit solar, wind and tidal energy opportunities rather than being largely dependent on another jurisdiction for our energy supply.



"... with one of largest tidal ranges in the world we should develop this unlimited resource on our doorstep to become the first island(s) to become 100% green. This would generate technical jobs for the economies of the islands..."

"... amazed to see how little renewable energy is generated. I appreciate the cost of a renewable energy infrastructure but see no progress or investment in this area."

"Every new building, particularly big ones like the new hospital or Les Quennevais School should be covered in solar panels..."

"I would question if it is wise to be 100% reliant on power from another jurisdiction."

"The sunniest place in the British Isles has virtually no solar energy. Go figure..."

"Why are we not pioneering electric cars? We could be a global leader of how to conceptualise / roll out / manage environmentally friendly projects and infrastructure..."

"Electricity & gas prices are beyond a joke."

"It would also be great to see the States making solar panels a basic requirement in States housing and offering schemes to help people install them in their own homes."

"This for me is one of the areas of public policy where Jersey really, really needs to up its game... Renewables could support us and also create a new high tech industry."

"New houses should have intelligent systems to save energy."

"While nuclear power is better in the short run for the environment than fossil fuels, there is no apparent action to increase a sustainable energy source."

"It is a travesty in this day and age that we are relying on fossil fuels etc when there is an abundance of natural energy being overlooked."

"...there is no encouragement for islanders to invest in renewable energy."

"Jersey is the perfect place for renewable energy... This would bring down costs in the long-term."

²⁷All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 612 respondents said they didn't know how Jersey was currently performing against this outcome.

Jersey's waste is managed appropriately

Why is this outcome important?

Waste is a misuse of resources. The materials and energy that went into the production and transport of the goods in the first place are lost when in many cases they might be used again and the costs of waste collection, management and disposal systems are high.

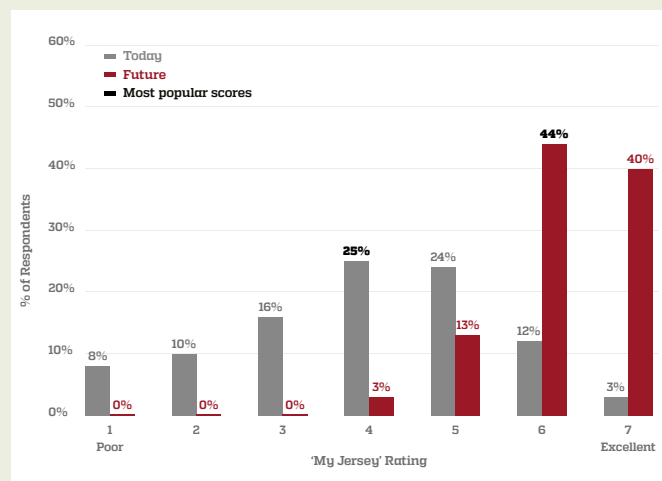
Today

39%
Positive

More people held positive (39%) than negative (35%) views.²⁸

The most popular score was 4 out of 7.

Nearly one in seven people said they didn't know how Jersey is currently performing against this outcome.



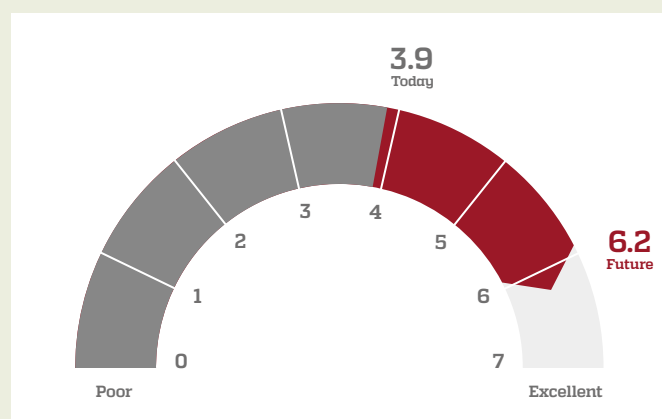
Future

44% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 3.9, whilst the average score for Jersey's future ambition was a 6.2. This represents one of the largest gaps to close between perceived current progress and future ambition.

The scoring of Jersey's current performance reflected a desire for more recycling, frustration at inconsistent approaches to recycling across the parishes, concerns about the disposal of recycled materials and the perceived value of Jersey's Energy from Waste plant.



"...insufficient incentives or services are provided to encourage recycling, particularly for those who do not have transport to get their waste to the recycling centre."

"Recycling green waste, plastic, paper, glass should be mandatory in every parish."

"Jersey also needs to work with the other Channel Islands to secure an overall energy and waste strategy as opposed to working in isolation."

"It's not just about getting rid of waste, it's about changing how we create it in the first place."

"We keep hearing about the islands working closely together, but we couldn't even sort out Guernsey's waste to burn. Both parties at fault. Disgrace."

"We need to do more in terms of recycling. In my parish all waste is collected together except glass which is separated out."

"I hear every day that the recycling boxes are simply thrown in a hole with everything together."

"I don't think we manage waste well. Recycling is encouraged inconsistently across the parishes, meaning needless use of fuel to get waste to the recycling/dump."

"We recycle as much family rubbish as possible, but have to take all recycling ourselves with no roadside collection."

"An Island wide system for all waste needs to be implemented."

"Waste is a shambles (put it under one authority, not 13!)."

²⁸All figures represent the proportion of respondents who expressed an opinion and therefore don't include the 562 respondents who said they didn't know how Jersey was currently performing against this outcome.

Jersey is managing the threats posed by climate change

Why is this outcome important?

Jersey needs to prepare for the unavoidable impacts of climate change over coming decades. Climate change will present growing challenges from the impact of changing temperatures, rising sea levels and more frequent, intense extreme weather events than we have been used to in the past. But there will also be many opportunities if we take appropriate adaptation action now.

Today

47%
Negative

More than one in four people didn't know how Jersey was doing against this outcome.

Of the remainder, more people held negative (47%) than positive views (27%).²⁹

The most popular score was a 4 out of 7.

This was one of the lowest ranked outcomes based on the total number of people rating Jersey's current performance positively.

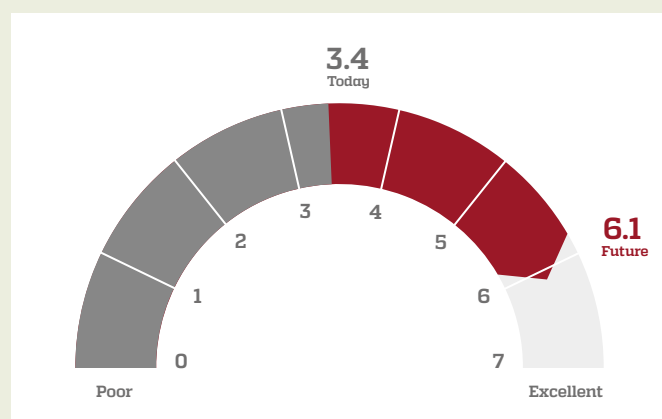
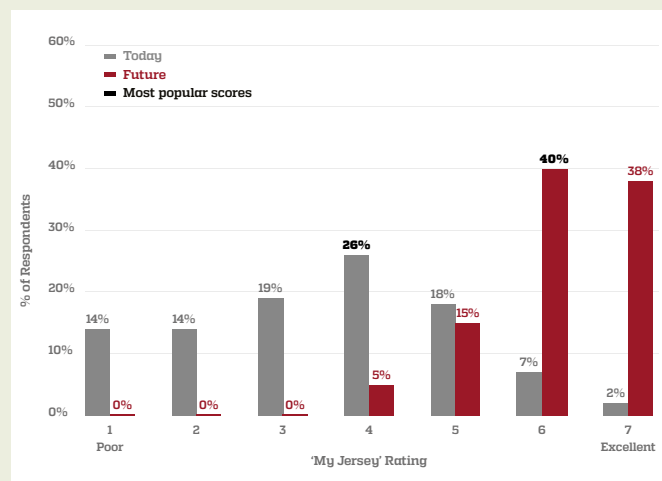
Future

40% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 3.4, whilst the average score for Jersey's future ambition was a 6.1. This represents one of the largest gaps to close between perceived current progress and future ambition.

The scoring of Jersey's current performance reflected perceptions that Jersey seemed to be doing little to prepare for the impact of climate change or that people should be better informed about the threat and Jersey's response.



"We are ignoring the threats posed by climate change."

"We repair after the impacts of climate change but it does not appear we are doing anything to future proof ourselves."

"As an island, we should be much much more concerned about rising sea levels than we are."

"...the threat of climate change needs to be a greater priority in the longer-term to secure Jersey's future. This includes... better consideration of the effects of global warming on a small island."

"There are no 'threats' posed by imaginary climate change."

"I don't notice anything at all being done about climate change in Jersey."

"I would like a little bit extra information to become available on how Jersey aims to respond to climate change."

"More needs to be done to reduce the impact of climate change, not just as an afterthought but while we can still actively do something about it."

"More and more fields are being built on, which takes away the green space to soak up the rainwater, which in turn puts more pressure on drainage and small streams to take up the increase."

"A more joined up approach to tackling climate change should be achieved across the public, private and third sectors."

"What exactly is Jersey doing to manage threats posed by climate change?? Building more homes on low-lying ground, ignoring the sad state of sea defences my grandfather helped build."

"Threats from climate change not widely communicated."

"As a small island resource efficiency and climate resilience is key to competitiveness."

"The island doesn't have a climate change strategy. St Helier and the coasts are vulnerable to an increase in sea level."

²⁹All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 1,130 respondents said they didn't know how Jersey was currently performing against this outcome.



Economy

Economic success has provided generations of Islanders with rewarding employment and opportunities, and helped fund investment in the infrastructure and services we enjoy today. Looking forward, a strong economy will also help Jersey's community to meet many of the challenges we face.

The Economy section comprises two strategic goals.

ATTRACTIVE BUSINESS ENVIRONMENT

JOBS & GROWTH

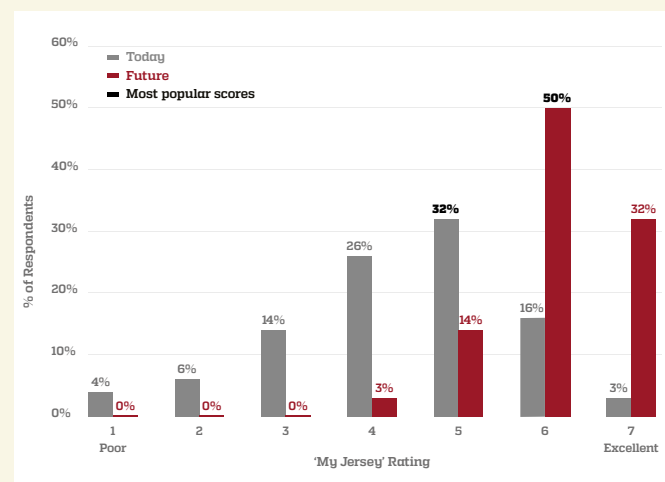
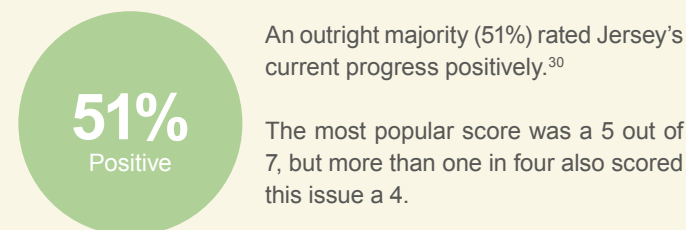
These goals break down into eight more detailed outcomes.

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

Why is this outcome important?

Jersey's future economic success will be significantly influenced by the skills of our people. Continuing to develop a highly, relevantly, skilled workforce, and ensuring this talent is applied effectively in sustainable employment is essential to improving productivity and sustainable economic growth. Equipping our workforce, and those entering it, with the skills that employers need is critical to the attraction and creation of high quality jobs.

Today



Future

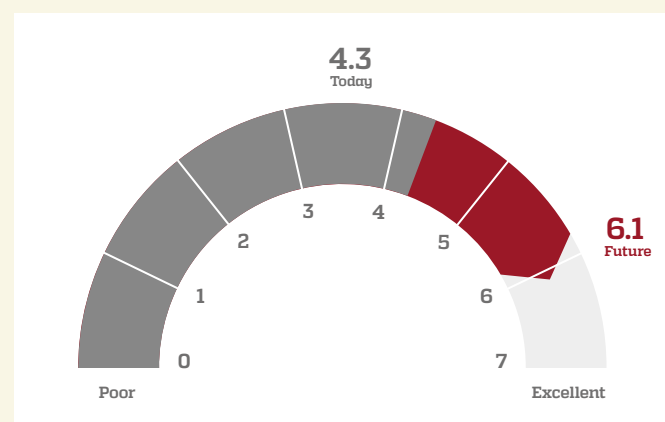
50% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.3, whilst the average score for Jersey's future ambition was a 6.1.

Many people acknowledged the importance of improving the skills base in Jersey. Developing and retaining local talent was strongly supported, though the importance of developing vocational as well as academic qualifications was also highlighted. Concerns were also expressed about the implications of not making sufficient investment in higher education funding.

Mixed opinions were voiced about importing labour into the Island. Some highlighted the value of bringing in skilled people to support the development of new and existing businesses. Others cautioned against allowing businesses to recruit non-local staff rather than invest in training and development.



"If we want to nurture more home grown talent then our schools are a vital part of that and standards have to be raised."

"Jersey needs to invest more heavily in further education and to retain graduates rather than import them."

"Fewer are going to university due to costs. This is different to other European countries. This means the island will have fewer graduates returning to the island."

"Islanders need more opportunities to improve their skills for businesses in the digital age. As someone who works in a specialized role in the Finance industry, I could not have obtained my qualifications and skills required for my role had I not worked in London for a number of years."

"Too much emphasis on the academic, not enough on the vocational. Not everyone is suited to or benefits from going to university."

"We are needing to import people with skills which means we need to provide housing, health and education at a cost to taxpayers, rather than invest in our own people."

"Poor skills in local workforce equals high immigration."

"In my business the internal development of staff is stagnant as they are just able to employ from the UK and seem to get employment licenses with ease."

"Why should workforce be aligned to the needs of business? Business plays a crucial role in the island but it is not the be all and end all. We equally need those who have skills to offer support to the needy in our island."

"...more working licenses should be offered to businesses seeking to hire non-residents with niche skills and fewer licenses offered to businesses who hire non-residents with more common skills. Often non-residents with niche skills can come to the Island and encourage further local employment by managing locals and passing on their skills and knowledge."

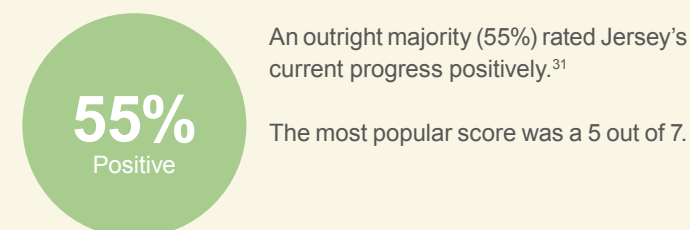
³⁰All figures represent the % of respondents who expressed an opinion and therefore do not include the 341 respondents who said they didn't know how Jersey was currently performing against this outcome.

Jersey is a digitally connected island

Why is this outcome important?

In order to underpin economic growth, Jersey needs a modern economic infrastructure. Telecommunications is a crucial element of that infrastructure as businesses increasingly rely on fast broadband access to compete successfully in external markets. For households, broadband connectivity is now increasingly relied upon for accessing a variety of services, information access and storage and various leisure activities.

Today



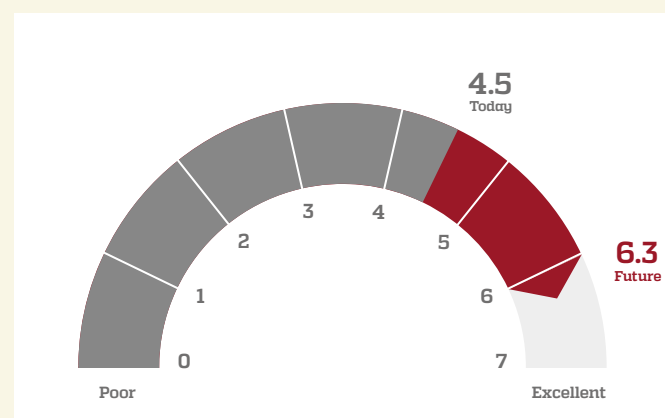
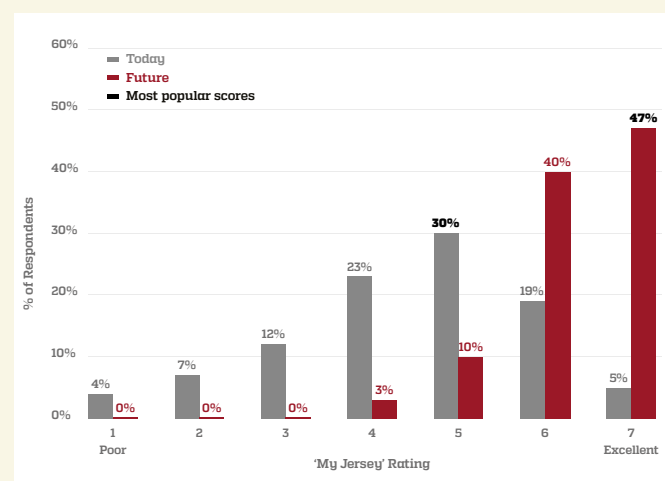
Future

This was one of the highest-rated outcomes for the future with nearly half (47%) of respondents saying Jersey's long-term ambition should be a maximum 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.5, whilst the average score for Jersey's future ambition was a 6.3.

Many comments focussed on the need to improve digital skills in the Island and the cost of internet access. People were keen to see progress in the development of the digital sector and there was a clear expectation that government should provide more services online.



"We are behind the curve on investment and training in Digital businesses..."

"Need more investment in children undertaking STEM [Science, Technology, Engineering, Maths] subjects to fill local roles in the digital sector and allow this to be Jersey's new area of expertise."

"Jersey talks a lot of digital, but expensive internet access and the lack of digital interaction with the States doesn't back this up."

"Whilst Digital Jersey is a great start, attracting a digitally strong workforce will take more than this. I'm not sure why digitally strong people would want to work here. The companies are few and far between, a lot of work goes off island anyway. And there is no real culture for these type of workers. We need stimulation in culture and in education."

"The infrastructure seems to be mostly in place, but the pricing is extortionate, reducing the percentage of Islanders that can afford it."

"Digital is the way forward for many businesses..."

"Too much talk and not enough results."

"...introducing levies, charges and user pays as forms of stealth tax."

"We are behind the times when it comes to our ability to offer secure digital services to our citizens. E-Gov and Tell us Once are trying to catch up."

"Jersey likes to pretend it is digitally connected but it isn't. When you can't even fill in your tax form online..."

"We are overestimating how good our digital skills are in Jersey. This area needs more thought and effort to find niche markets."

"We have a very small digital talent pool and frequently have to bring people from the UK."

³¹All figures represent the % of respondents who expressed an opinion and therefore do not include the 323 respondents who said they didn't know how Jersey was currently performing against this outcome.

Jersey encourages new business, inward investment and competition

Why is this outcome important?

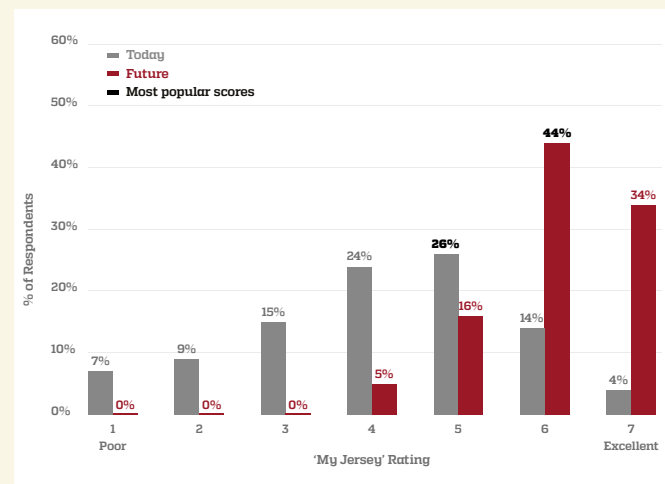
Enterprise in our economy, driven by entrepreneurs, local businesses and inward investors is one the key factors that can deliver competitiveness, growth and diversification in our economy. Enterprise creates new job opportunities, increases economic output and productivity, and importantly drives diversification to broaden our employment and fiscal base. Inward investors can also bring new job opportunities, new ideas and new ways of doing business that help boost productivity and increase competition, thereby benefiting consumers.

Today

44%
Positive

More people held positive (44%) than negative (32%) views.³²

The most popular score was a 5 out of 7, but nearly a quarter of respondents also rated Jersey's current progress as a 4.



Future

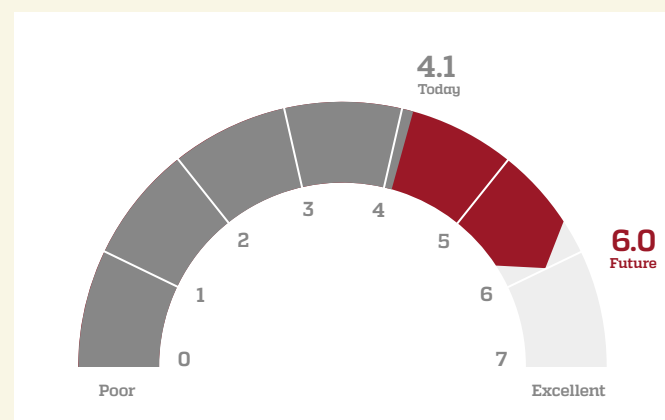
44% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.1, whilst the average score for Jersey's future ambition was a 6.0.

Many comments reflected perceptions about the perceived obstacles to setting up businesses in Jersey, particularly with regard to bureaucracy, recruitment and commercial rents.

Other people also commented on the importance of diversifying the economy, but also on the need to secure the right type of inward investment and attract new business that is right for Jersey's needs.



"It's not always a good or easy place to start or grow a business, especially as regards skills and recruitment. We need to take some risk with population to ensure the levels of labour market liquidity that drive growth, creativity, innovation and diversification."

"The current status of the Social Security contributions is prohibitive for new start-ups and self-employed small businesses."

"As a business owner myself, the States make it very difficult to jump through hoop after hoop... New business start-up should be controlled by one department so you don't get sent on a wild goose chase round every States department."

"Please stop bringing in non-local businesses and start supporting the locals instead of big English corporations."

"By buying into large chains you're helping a CEO buy his third yacht. By investing in local, you're helping children to buy books, a teenager to learn to drive, and young people to go to university."

"It is too expensive to start most sorts of business. When they are started most have to import people to work in them as it is not easy to get the training and qualifications here."

"We need inward investment and imported businesses but not at the cost of the environment."

"Commercial rents are far far too high and do discourage those who want to innovate or start a new concern."

"There is a lot of bureaucracy to deal with if trying to run a business."

"The public need to understand inward investment more. Not enough is published regarding the benefits."

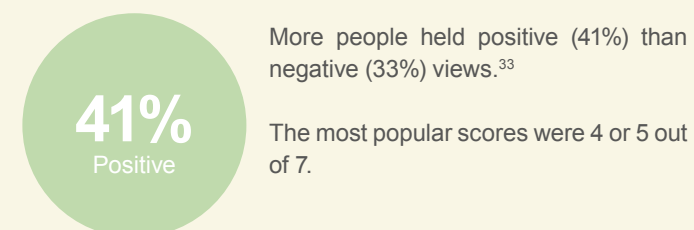
³²All figures represent the % of respondents who expressed an opinion and therefore don't include the 93 respondents who said they didn't know how Jersey was currently performing against this outcome.

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

Why is this outcome important?

One way in which businesses in Jersey can become more productive is through innovation - by introducing new, valuable products and services; new processes for producing or distributing products; new and more efficient organisational structures or new techniques for marketing. Estimates suggest that innovation accounts for 25 per cent to 50 per cent of productivity growth in developed economies (OECD 2015).

Today



Future

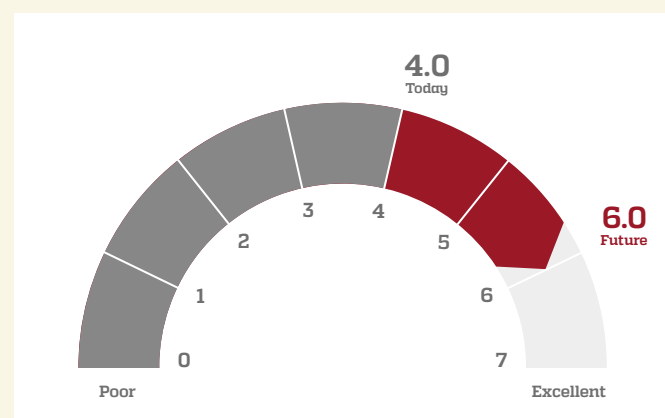
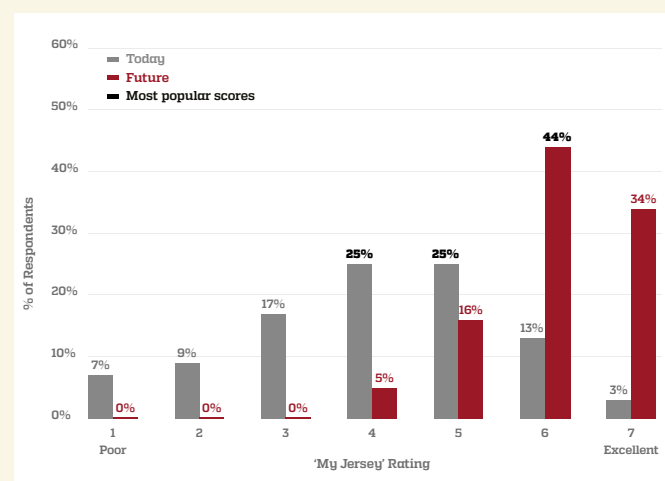
44% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.0, whilst the average score for Jersey's future ambition was a 6.0.

Comments highlighted concerns that the costs of doing business in Jersey inhibited innovation, as did the bureaucracy entailed in setting up new businesses.

Some comments also highlighted the importance of looking beyond the economic factors to think about ensuring Jersey offered an environment where creative innovators and entrepreneurs wanted to live and work.



"Allow more research to be conducted on Island, let Jersey be a testbed for new technology, we could pilot a whole range of technology."

"Aspects of legislation need looking at to enable businesses to be creative. Particularly thinking of entertainment and licence laws."

"Diversification is urgently needed and educational opportunities for a broader range of careers to support new business opportunities would help stabilise our economy."

"Without investment in higher education, we won't have the skilled workforce new innovative businesses need."

"Too much red tape makes it nearly impossible for people's ideas and creativity to thrive."

"Jersey needs to be able to react fast to markets and be more flexible it should be ahead of the curve rather than dragging behind."

"We should be rewarding community innovation and businesses which will benefit the island and the community we live in."

"Jersey needs to focus on innovation, in particular supporting young entrepreneurs."

"Jersey has so much potential to be a hotbed of innovation, given its location, workforce, tax and legal base and small size amongst others."

³³All figures represent the % of respondents who expressed an opinion and therefore don't include the 671 respondents who said they didn't know how Jersey was currently performing against this outcome.

Jersey has a fair, competitive and stable tax system

Why is this outcome important?

Policies on taxation effect each and every person and business in Jersey. If taxation is understood as a given to provide the infrastructure and services that Islanders need and expect, then the basic questions that government must answer concern how much tax it needs to collect, the effect it can have on economic activity and the appropriate distribution of the tax - in other words, who should pay and how much?

Today



This was one of the lower ranked outcomes in the survey based on the total number of people rating Jersey's current performance positively.

Future

43% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

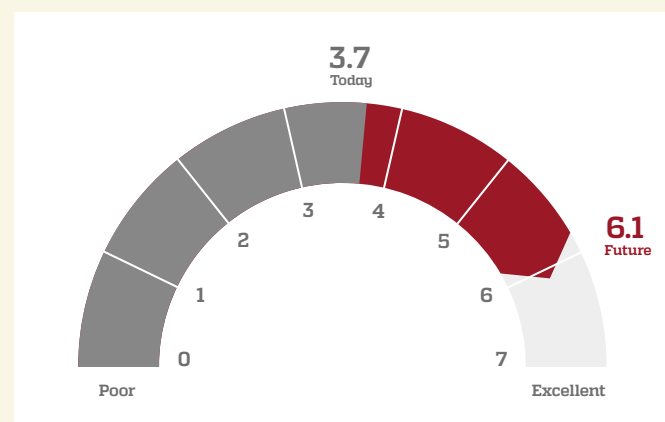
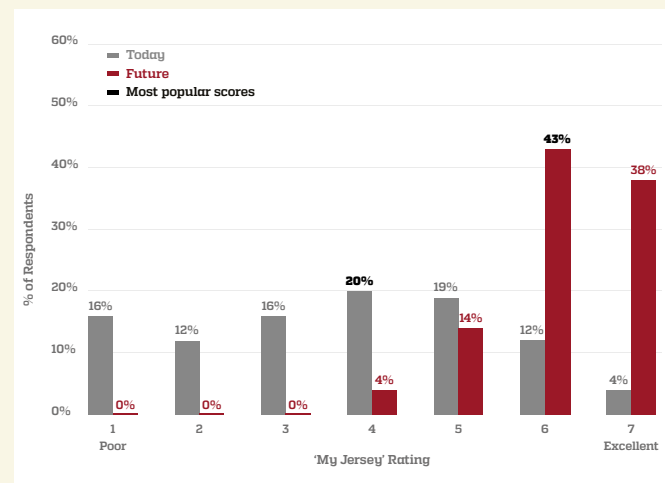
Closing the gap

On average, Islanders scored Jersey's current progress as a 3.7, whilst the average score for Jersey's future ambition was a 6.1.

This represents one of the largest gaps to close compared to perceived current performance.

There was some acknowledgement that Jersey's tax rates compared favourably to the UK but this was largely drowned out by the argument that the Island's tax burden was disproportionately carried by 'middle earners'. These respondents were seen as being unfairly squeezed between low income households paying no income tax, and high earners, widely believed to be paying proportionately less than they should, and off-island corporations paying nothing. The latter point was also seen as putting local businesses at an unfair disadvantage.

Methods of tax assessment also came in for criticism and the introduction of a variety of new charges were widely perceived as 'stealth taxes'.



³⁴All figures represent the proportion of respondents who expressed an opinion and therefore don't include 'Don't Know' responses. 238 respondents said they didn't know how Jersey was currently performing against this outcome.

"A tax strategy that is wholly unfair, to the working population and local businesses."

"Stop killing the middle earners."

"How can a tax system be fair when I am bearing a greater tax burden on my tiny annual income than a large multi-national corporation?"

"Middle earners carry the tax burden for everyone else."

"The middle income earner is being punished with a string of new 'charges'. OAP tax, health charge, waste charges etc. I am a skilled worker who has no objection to contributing my fair share for the elderly and genuinely incapacitated who have earned/deserve said support, but quite frankly I am disillusioned right now."

"Jersey's taxation system is completely UNFAIR to local business owners."

"...it's scandalous that most goods seem to have GST added on top of UK VAT inclusive prices."

"...introducing levies, charges and user pays as forms of stealth tax."

"I have little confidence in the calculation of my tax as it seems to yoyo, which makes it more difficult to budget with a family."

"The tax rate is excellent compared to UK."

"Externally, our tax system is serving us well, but internally, it needs review."

"Outside companies must be made to pay local tax instead of just making profits and taking them away paying nothing into our system. So unfair for local struggling companies."

Jersey has a stable and low rate of inflation

Why is this outcome important?

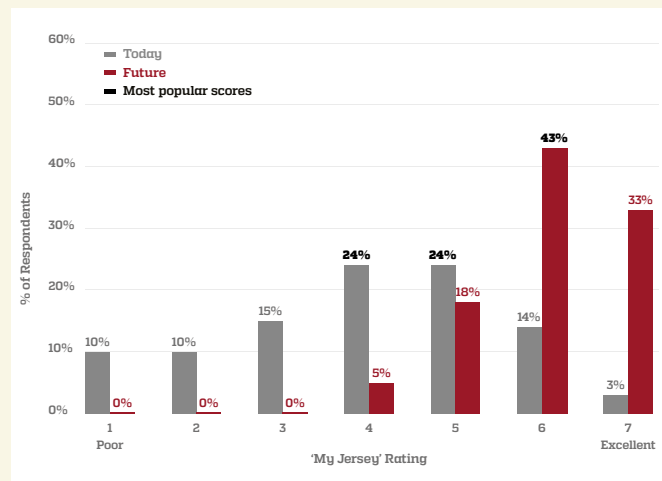
Low inflation is fundamental to improving the competitiveness of the economy. While many factors outside the Island's control influence inflation, there is much we can do locally to curb it. Failure to do so would mean that the Island's residents and businesses would be worse off.

Today



More people held positive (41%) than negative (35%) views.³⁵

The most popular scores were 4 or 5 out of 7.



Future

43% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

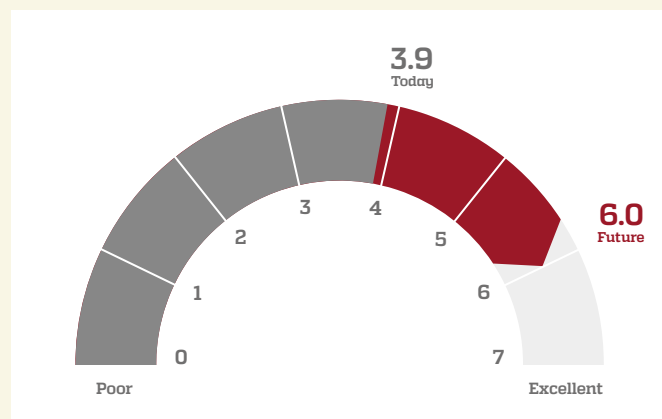
Closing the gap

On average, Islanders scored Jersey's current progress as a 3.9, whilst the average score for Jersey's future ambition was a 6.0.

Many people acknowledged that the current inflation rate in Jersey is low and has been stable for some time and the main focus of concerns was on the cost of living rather than inflation itself.

In particular, many people focussed on the discrepancy between increases in their earnings and the inflation rate.

A lack of competition was perceived as a factor behind high prices in the Island, exacerbated by the perceived difficulties and costs entailed in setting up new businesses.



"Jersey has never encouraged competition that's why the prices are so high here."

"Inflation may be relatively low but prices are too high!"

"...it feels like every year my salary is stretched further and further for basic needs such as food, electricity and clothing."

"We are price takers on the island and local trade and business often abuse this position by over charging."

"Landlords charge too much rent for commercial properties and therefore prices have to be set higher to offset. Requires more government interaction."

"Inflation figures look good, but the real rate of inflation for people who are struggling most to make ends meet is excessively high."

"The rate of inflation is determined by many factors outside of the Island's control but CICRA need to investigate where businesses are imposing inflation busting rises which are not in line with UK."

"Wages are remaining static while everything gets more and more expensive."

"We do not have any competition on the island for most services, so they charge high prices."

³⁵All figures represent the % of respondents who expressed an opinion and therefore don't include the 518 respondents who said they didn't know how Jersey was currently performing against this outcome.

Islanders can access rewarding jobs

Why is this outcome important?

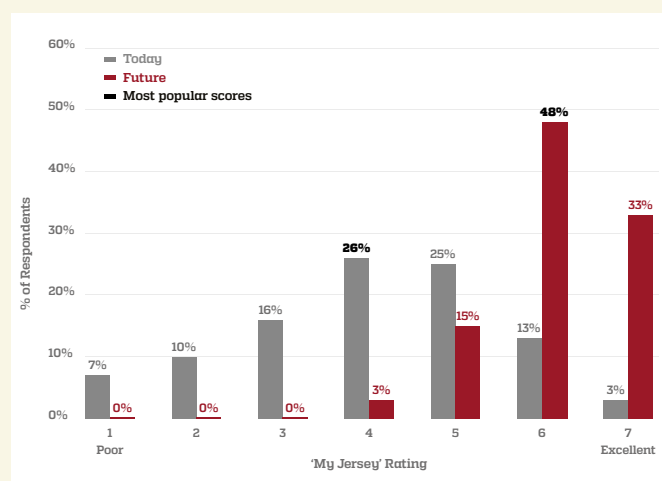
This outcome is about increasing the number of people working in jobs which are sustainable, well-paid and which offer opportunity for development. It is about ensuring that job opportunities exist at all levels for Islanders and encouraging our talented people to remain here for employment and to progress up the skills ladder. It is also about attracting talent to Jersey who can help businesses grow, become more productive and increase employment opportunities.

Today



More people held positive (41%) than negative (33%) views.³⁶

The most popular was 4 out of 7 although a quarter of people also scored this outcome a 5.



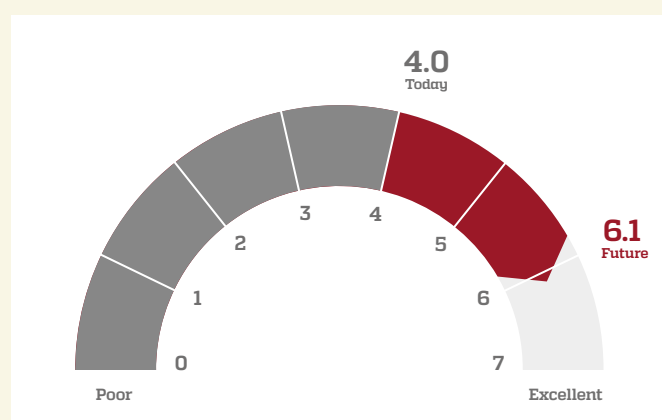
Future

48% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.0, whilst the average score for Jersey's future ambition was a 6.1.

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



“School leavers ought to have a better range of career choices (and apprentice experiences) too, otherwise we lose bright, capable, interesting people who seek more than a career in finance.”

“In a nut shell, there is little opportunity for islanders outside finance. Unless you don’t mind struggling with high house prices, heating and food costs.”

“Very few opportunities in anything other than finance. Drives creatives out of the island.”

“Apprenticeships need to be brought back & encouraged more, especially in the trades, the art of a tradesman is becoming wiped out.”

“If we invite new businesses here they should employ/train local staff instead of bringing in their own.”

“Jersey must be prepared to challenge the future role of traditional industries, given the number of people they import into the Island to live on low wages.”

“More diversity in the economy is required as many admin jobs will be made obsolete by technology in the future.”

“I now do office admin in the evenings to avoid childcare costs. I can do better than this, I want to do more than this but there are no family friendly options for me.”

“The most rewarding jobs are often the lowest paid, like those in the caring profession.”

“5 year residency law. Whilst I’m in favour... I do believe this stops a better level of expertise from entering the island, ESPECIALLY young innovative passionate individuals.”

³⁶All figures represent the % of respondents who expressed an opinion and therefore don't include the 196 respondents who said they didn't know how Jersey was currently performing against this outcome.

Jersey businesses are successful and productive

Why is this outcome important?

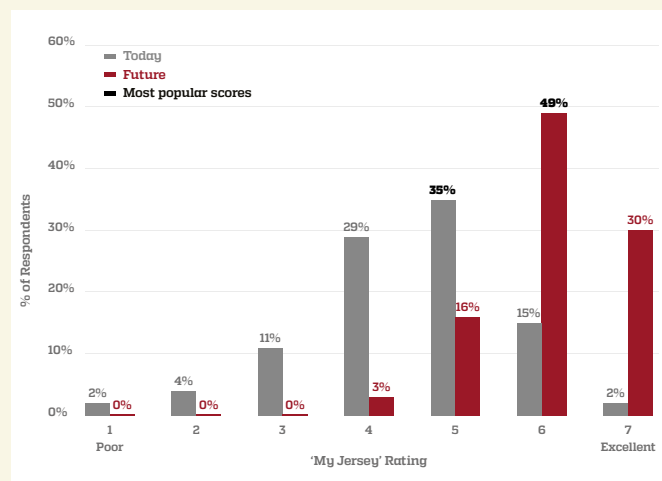
Jersey's future productivity growth will play a vital role in raising Jersey's economic performance and competitiveness, improving the public finances and ultimately raising the standard of living and quality of life. For employees, productivity is important because of its link to wages and the lifestyle these wages can finance. Similarly, for firms, productivity is important given its link to profits.

Today

52%
Positive

An outright majority (52%) rated Jersey's current progress positively.³⁷

The most popular score was a 5 out of 7, although nearly 30% also scored this outcome a 4.



Future

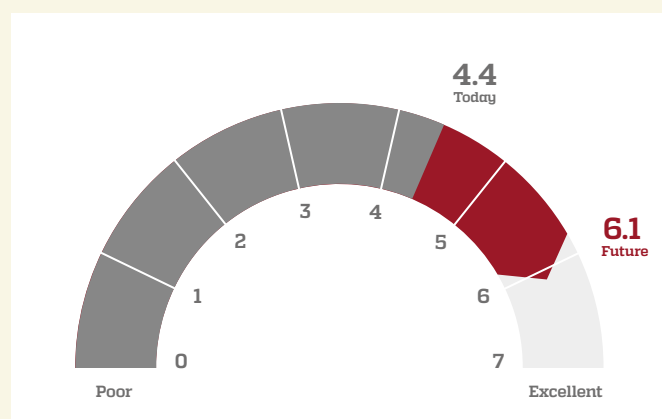
49% of respondents thought Jersey's long-term ambition should be a 6 out of 7.

Closing the gap

On average, Islanders scored Jersey's current progress as a 4.4, whilst the average score for Jersey's future ambition was a 6.1.

Finance was widely perceived as a successful business sector and there was acknowledgement of its importance to Jersey's economy.

Much of the comment focussed on the challenges faced by businesses operating in other sectors, particularly in the face of high costs and competition from larger UK corporations.



“Please stop bringing in non-local businesses and start supporting the locals instead of big English corporations.”

“Hard work and good ideas make successful business. Excessive rents, lack of imagination in the built environment stifle it.”

“On the whole I think businesses are successful in finance and hopefully that will continue as the whole economy depends on that industry.”

“Too many companies, both local and overseas especially in tourism and retail pay no local tax and employ personnel on low wages who therefore pay little or no tax.”

“The costs on this island are high, so to be profitable the businesses have to pay low wages and/or cut corners on service.”

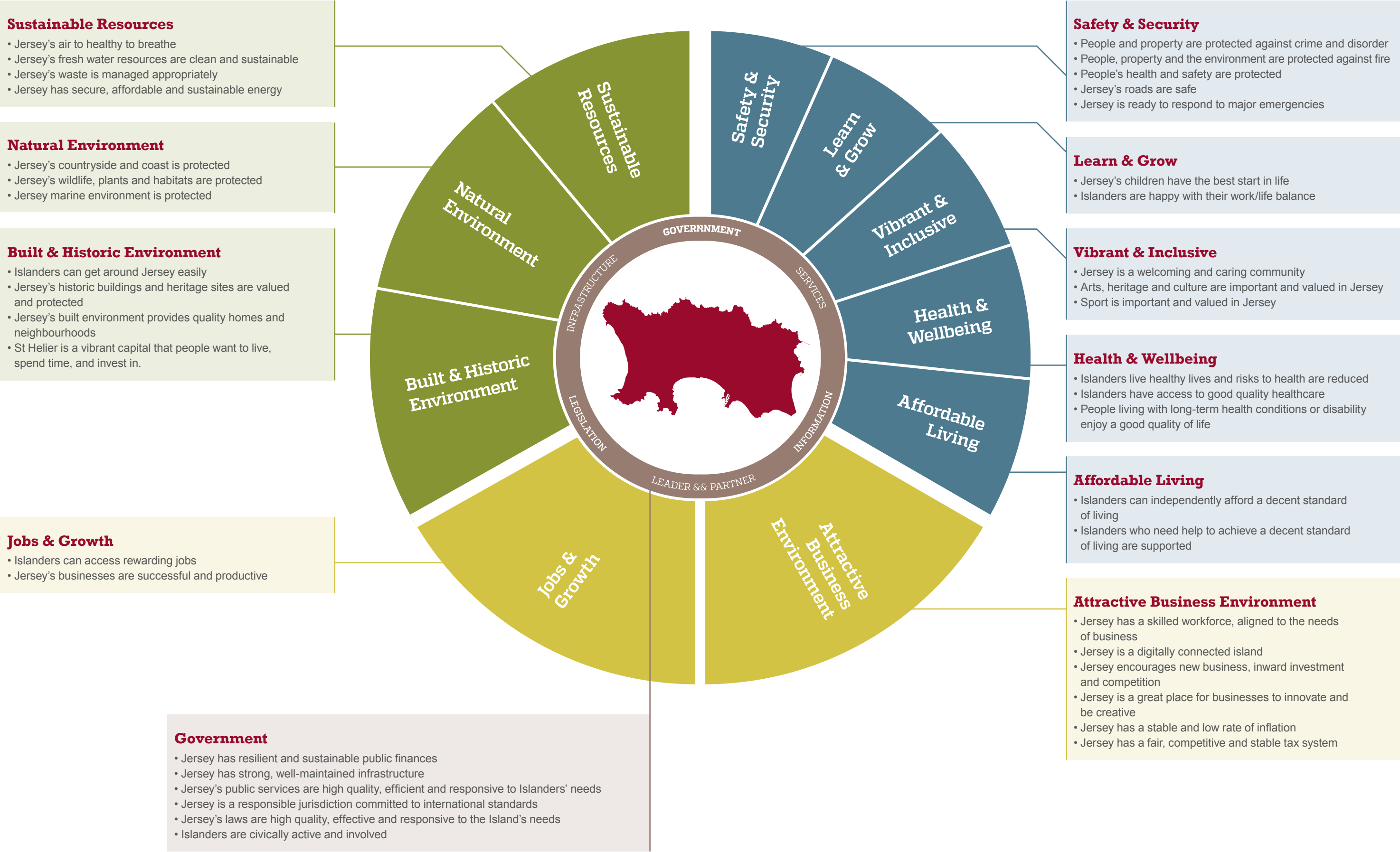
“St Helier shopping is fast becoming a clone of mainland high streets, is the island really trying to encourage local businesses?”

“A significant part of Jersey's economy is dependent on foreign parent companies and non-resident shareholders who dominate production and job creation at the expense of genuine local creativity.”

“We need to encourage better access to management consultancy/coaching in Jersey (access to which is easier to find in the UK) so we have more enlightened business leaders/role models.”

³⁸All figures represent the % of respondents who expressed an opinion and therefore don't include the 520 respondents who said they didn't know how Jersey was currently performing against this outcome.

Appendix A: The vision Framework



Notes on the survey analysis

Excluded surveys

13 surveys were not included in the analysis after running different filters on the data set.
Reasons for excluding them were:

- Answering all 70 questions with a 1
- Answering all 70 questions with a 7
- Answering all the questions with a repetitive pattern of 1:7 throughout
- Answering all questions with a repetitive pattern of Don't Know:7 throughout
- All answers left blank

Unfortunately, a handful of surveys received after the closure date were not included as the data analysis had already begun.

Notes

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