

## **SECTION 2: CONTEXT**

### **INTRODUCTION**

- 2.1 The Island Plan needs to respond effectively to the major economic, social, cultural, environmental and land-use issues facing the Island and the concerns and priorities of the Island community. It needs to anticipate and accommodate land-use requirements according to likely changes over the next ten years. Moreover, while it will primarily guide development to the year 2011, it also must provide a long-term approach to the development of Jersey in order to ensure that the social, cultural, environmental and physical resources of the Island are sustained for future generations to enjoy.
- 2.2 This section provides the context of Jersey's legislative and institutional framework, States' strategic policies and other key policies and proposals. It looks at the economic and social trends anticipated during the Plan period and key issues for the Plan to address.

#### **The States of Jersey**

- 2.3 The Island Plan Review has been undertaken within Jersey's constitutional, legislative and institutional framework. The Island is not part of the United Kingdom; it owes allegiance directly to the Crown. It is self-governing although Her Majesty's Government retains responsibility for defence and international relations. For planning purposes therefore, the States of Jersey represents all tiers of government, compressed into a single legislative and administrative body with its associated executive committees.
- 2.4 Jersey is neither an EU member state nor an associate member of the EU and thus is not obliged to meet either the environmental and social standards or the associated directives set and issued by the EU. The Island has special terms agreed in the Treaty of Accession (when the UK Government joined the European Economic Community). The Treaty applies to the Island in respect of the free movement of industrial and agricultural goods, but other elements such as free movement of citizens, capital and harmonisation of taxation and social policies do not apply. However, in trading with other member states Jersey has to meet certain standards and the Island does make commitments to other EU standards and directives where considered appropriate, either by adopting them or using them as a benchmark. There are no grounds to suppose that these relationships will change within the life of the new Island Plan.

## International Commitments

- 2.5 The Island is subject to more than 350 international treaties, conventions and protocols, which carry legal and moral commitments as well as rights and obligations under international law. Those particularly relevant to the Island Plan include those concerning the environment. There are other agreements covering social and economic matters, such as Human Rights Law, which will impact indirectly on the planning system and thus need to be taken into account. A list of relevant international commitments is included at Appendix 1.

## STRATEGIC POLICY FRAMEWORK

- 2.6 The strategic policy context for Jersey, and thus the Island Plan, is contained within the 1995 *Strategic Policy Review - 2000 and Beyond*, and subsequent annual reviews. The Vision Statement for Jersey is:

*“An Island in which all are able to enjoy a high quality of life and level of personal fulfillment, a high quality of natural and built environment, an opportunity to use their talents fully in gainful employment, the protection of persons and property, a high standard of public and private service and overall standard of living, and personal freedom and rights.”*

- 2.7 The mission statement identified that States’ policies should be designed to achieve the following aims that are relevant to the Island Plan:
- a permanent resident population the same or less than the current level (as of 1995);
  - sustainability, so that the environment of Jersey is passed on to future generations in as good a condition as, or better than, today;
  - the full employment of Island residents and the full development of their skills and talents;
  - the best possible balance to the economy;
  - a standard of living comparable with that enjoyed in neighbouring countries;
  - the maintenance of the Island’s low tax status;
  - a standard of social services comparable with that to be found in neighbouring countries;
  - a quality of life that continues to compare favourably with that found in neighbouring countries;
  - equality of opportunity; and
  - freedom from discrimination.
- 2.8 The Strategic Policy Review in 1997 focused on the population and immigration policy and on minimising social deprivation. It reiterated the mission statement of *2000 and Beyond*.
- 2.9 For each of the main strategic policy objectives in its mission statement, the States has also approved a series of lower-level objectives. Many of these relate to environmental, economic, social and quality of life issues, so they are relevant to the Island Plan.

## Strategic Policy Review: Objectives

### Environmental Objectives

- to ensure that the development and management of natural resources does not limit choices in the future;
- to integrate pollution control and waste minimisation to prevent environmental deterioration;
- to enhance the quality of the shoreline, the rural and the urban environment;
- to reduce consumption of non-renewable energy;
- to preserve open land while recognising and responding to the need to provide for the Island's economic and social policy objectives;
- to discourage development in the rural environment;
- to reduce the detrimental impact of traffic on people's lives;
- to avoid over-exploitation/consumption of the Island's mineral and water resources;
- to conserve and protect the marine environment;
- to limit the use of resources through mechanisms which do not impose increased costs for those with relatively low incomes;
- to protect the best of the Island's architectural heritage;
- to protect the Island's natural ecosystems, and conserve their associated flora and fauna;
- to adopt an agriculture policy that does not impact adversely on the environment;
- to limit the impact of noise and other nuisances;
- to ensure compliance with international commitments; and
- to raise levels of environmental awareness and responsibility.

### Economic Objectives

#### General

- to encourage the balanced and diversified development of the economy in such a way as to limit its vulnerability to external shocks and changes in market climate;
- to encourage a level of business activity sufficient to achieve a standard of living for Island residents that is comparable with that enjoyed in neighbouring countries;
- to encourage business activity at a level and of a nature that serves to enhance and not detract from the natural and built environment;

#### Financial Services

- to ensure that the industry has adequate resources to support the desired further strengthening of the industry and its diversification;

#### Tourism

- to ensure that the tourism industry maintains its present contribution to the economy of the Island, and to the employment of Island residents both directly and indirectly;
- to pursue a policy for the tourism industry founded on the Island's natural qualities;
- to encourage further improvement in the tourist accommodation and services;
- to encourage private and public investment in the tourism industry that is supportive of a general theme of a high quality product which is in accord with the Island's environmental policy objectives;
- to support the promotion of the Island in respect of its environment, heritage, arts and festivals;

#### Agriculture and Fisheries

- to continue to support agriculture to ensure that the incomes of those in the industry do not fall behind the average incomes for the community at large;
- to seek ways of diversifying farm incomes; and
- to ensure that agricultural practices are consistent with environmental policy objectives;

#### Manufacturing/Service Activities

- to encourage light industry/service activities to provide for the diversification of the economy;
- to encourage those activities that have least impact on the environment;
- to concentrate on those activities that limit the need for the construction of new commercial premises on green field sites;
- to encourage those areas of business that are best supported by the Island's natural attributes; and
- to sustain an efficient and cost competitive local construction industry.

### **Social Objectives**

- to ensure that all individuals living in the Island are adequately housed, but with priority given to those with residential qualifications;
- to ensure that every individual has the opportunity to reach their full potential through education and training;
- to provide for the physical and mental health of all individuals;
- to minimise social deprivation through ensuring that adequate assistance is given to those in greatest need; and
- to make better provision for those with disability.

### **Quality of Life Objectives**

- to promote Jersey's own heritage and culture – a sense of being Jersey or belonging to Jersey, whatever a person's place of birth;
- to generally enhance the sense of community within the Island;
- to reduce the level of crime;
- to provide adequate leisure facilities for residents to enjoy;
- to recognise the full value of the Island's important coast and countryside;
- to provide the necessary air and sea transport services to enable Island residents to travel between the Island and other communities year round at a reasonable cost;
- to limit the detrimental impact of traffic on the lives of Island residents; and
- to limit the impact of noise and other nuisances.

## **The Environmental Charter 1996**

- 2.10 The corporate view of the States on sustainability and the environment was further confirmed by the endorsement of the Environmental Charter in 1996. This provides a clear mission statement:

*“The States will promote the conservation and sustainable use of resources and will minimise environmental pollution in all its own activities. It will seek, through its influence, the achievement of the same objectives by other sectors of the community. The States will review all of its policies, programmes and services and undertakes to act wherever necessary to meet globally accepted environmental standards.”*

- 2.11 The Island Plan will assist in meeting the commitments of the Environmental Charter by formulating policies for the following policy issues identified in the Environmental Charter:

- Waste Management – develop a waste management policy appropriate to Jersey, including a policy of waste minimisation, a commitment to recycling and the consideration of subsidies to ensure that recyclable material is removed from the waste stream.
- Transport and Planning – develop transport and planning policies which encourage the use of public transport and minimise the use of other vehicles. The policies will support the provision of facilities for, and encourage, cycling and walking, and encourage a policy of fuel efficiency.

- Coast and Countryside – develop a strategy for the conservation, improvement and enhancement of the coast and countryside, including measures to provide for nature conservation and the protection of wildlife habitats, and to protect and enhance public open spaces and the coastal and aquatic environments. To adopt environmentally sustainable methods of land management (which do not compromise wildlife interests) for parks, open spaces and verges, and to promote sustainable methods in agriculture and countryside management.
- Built Environment – develop a strategy for the conservation, improvement and enhancement of the built environment including measures to protect and enhance the built heritage and open spaces, to improve access, and to encourage and promote good architectural design and have regard for the social and cultural environment.
- Water and Minerals – develop a water and minerals resources policy to provide for the sustainable utilisation of local water and mineral resources.
- Pollution – develop a strategy for minimising and monitoring pollution.
- Energy – develop an energy policy based on energy conservation and clean technology, and to ensure that the appropriate energy management mechanisms are introduced within States’ departments.
- Environmental Assessment – develop a framework for the operation of environmental assessment.
- Health Strategy – develop a health strategy which recognises the links between the environment and public health and includes the implementation of a health and safety policy which has full regard to environmental hazards.
- Tourism and Recreation – develop a strategy for tourism and recreation, which recognises that the environment – enjoyed by both these sectors – is inherently fragile.

### **Sustainability Strategy for Jersey**

2.12 In the same timeframe that the new Island Plan has been prepared, a Sustainability Strategy for Jersey has been developed which has engaged members of the public, interest groups, organisations and institutions in the Island. The final report “Jersey into the Millennium: A Sustainable Future” was produced in December 2001 for consideration by the States. The report highlights the fundamental tenets of sustainability, which are to:

- respect and care for the community life;
- improve the quality of human life;
- conserve life support systems and natural diversity;
- minimise the depletion of non-renewable resources;
- change personal attitudes and practices;

- empower communities to care about their environments;
- provide a framework for integrating development and conservation;  
and
- create a global alliance recognising globally shared resources.

It comprises a range of key policy options, the relevant ones of which are set out in the table for each of the 11 topic areas.

### **Jersey into the Millennium - A Sustainable Future. December, 2001 Key Policy Options**

#### **Water and Mineral Resources**

- A new Water Resources Law to be produced and agreed by the States by 2002.
- The promotion of a public awareness raising campaign of the need to reduce water consumption.
- The on-going Fiscal Review, in liaison with the Jersey New Waterworks Company, to address the issue of fiscal measures to encourage the use of water meters.
- To regularly review and update local climate change predictions.
- The States to endorse the Jersey Mineral Strategy, 2000 - 2020, prepared by the Planning and Environment Committee, subject to the resolution of the potential traffic problems.
- The adoption Island-wide of the glass collection scheme (for secondary aggregate use) already initiated by the St. Helier Parish.

#### **Energy**

- To complete the review of environmental functions, ensuring that the responsibilities for energy policy are properly addressed, in 2002.
- To ensure that the use of fiscal measures to achieve energy conservation goals is fully addressed in the on-going fiscal review.
- All States departments to undertake an energy audit in 2002. To achieve, in the public sector, a 2% per annum reduction in fuel consumption.
- The Housing Committee, in partnership with the JEC and a private supplier, to establish a model house to demonstrate energy efficiency and the use of alternative energy sources.
- To establish a small action group to foster initiatives to achieve real energy conservation gains.
- To establish a Working Group to monitor, review and make recommendations with respect to the development of alternative energy sources.

#### **Biodiversity and Countryside**

- To reduce the impacts of pollution, traffic, and population.
- To ensure that biodiversity and countryside issues are addressed in the Island Plan Review in accordance with sustainability principles.
- To achieve States approval for, and the implementation of, the Biodiversity Strategy in 2002.
- To increase understanding and awareness of the linkages between biodiversity and the countryside landscape.
- To complete the review of environmental functions, addressing the issue of resource allocation, as a priority.
- To ensure that the outcomes of the review of the agriculture industry recognise, and respond to, its impacts on the environment.
- To fulfil the 1995 States Policy objective to produce an integrated coastal zone management strategy which will safeguard the marine natural heritage.

### **Built Environment**

- To ensure that the Island Plan Review adequately addresses the key options generated in the consultation process.
- To integrate into the sustainable transport policy measures to address traffic related problems in the built environment.
- To achieve States approval for an immigration policy.

### **Pollution**

- To complete and implement the review of environmental functions as a priority.
- To achieve States approval for a Water Resources Law in 2002.
- To introduce a Code of Practice to set a duty of care framework.
- To review the environmental monitoring programme to ensure its efficacy and appropriateness, and to establish, as a priority, an environmental database that meets the requirements of the Island's international commitments.
- To achieve States approval for a sustainable waste management strategy that reflects the EU hierarchy, and requires any incinerator replacement(s) to be of the highest environmental standards, in 2002.
- To achieve States approval for an air quality strategy as a priority.
- To actively pursue in the on-going fiscal review the use of fiscal measures as a means of encouraging environmental initiatives.
- To raise awareness and understanding of pollution issues and solutions.
- To encourage the adoption of EMS across States departments and the private sector.

### **Traffic and Transport**

- To ensure that the Island Plan Review adequately addresses the issue of integrated transport and land use planning, including policies for appropriate car parking to support sustainable transport policies.
- To promote, through partnership with the private sector, a more effective public transport system.
- The States to reaffirm its endorsement of the Sustainable Island Transport Policy agreed in 1999, and to provide the resources and political support to initiate actions.
- The Finance and Economics Committee to adequately address in the Island's budget strategy the need to use fiscal measures to assist in the achievement of sustainable transport objectives.
- To set targets and timescales for reductions in greenhouse gas emissions that reflect global commitments.

### **Waste Management**

- To obtain States approval for the waste management strategy.
- To raise public awareness of their own roles in achieving waste management objectives.
- To set recycling targets and timescales for their achievement.
- To work towards a co-ordinated and cohesive waste collection service by 2012.
- The Public Services Department to adopt the ISO 14001 EMS and to encourage its wider adoption in the private sector.
- To support the initiatives being proposed by the Agriculture and Fisheries Committee to decouple subsidies from production.
- To appoint a consultant to fully appraise the potential for the use of crushed aggregate to replenish marine sediment levels.

### **Social Issues: Health, Law and Order, Education**

- To provide funds that will promote the use of partnerships, especially with local NGOs, to foster improved community equity and opportunity.
- To support the establishment of a youth strategy with adequate political support.
- The States to endorse and activate the proposed Community Relations Trust.
- To ensure that the Finance and Economics Committee fully evaluate long term benefits when making decisions on short term health costs.
- To ensure that building design increasingly recognises the need to provide the flexibility for longer term habitation.
- To ensure that urban planning includes the provision of adequate open space and other recreational elements.
- To ensure that a Lifelong Learning Strategy is established as a priority.
- To ensure that the school curriculum adapts to the educational demands of sustainability.
- To raise awareness and understanding of the social, economic and environmental linkages that have a mutual impact on health, education and law and order.

### **Social Issues: Housing and Poverty**

- The States to provide political and budgetary backing to the Planning and Environment and Housing Committees to address the housing issues identified in this and other recent surveys so that social inequalities are adequately addressed.
- To encourage higher density, high quality affordable housing which makes optimum use of the Island's urban areas.
- To ensure that the Finance and Economics Committee fully evaluate all long term benefits/costs when making decisions on short term housing costs.
- To raise annual contributions to Overseas Aid at a rate designed to achieve the requirement of the international norm agreed at the Earth Summit in 1992 within five years.
- To ensure that a Lifelong Learning Strategy is established as a priority

### **Economy**

- Develop close links with local employers to ensure training and skill requirements are effectively identified and subsequently improved.
- To ensure that a Lifelong Learning Strategy is established as a priority.
- To encourage economic diversification that promotes less labour intensive activities.
- To optimise opportunities for "off-Island" linkages that facilitate economic development without people growth.
- To provide maximum support for the swift implementation of ICT initiatives.
- To provide a system of fiscal incentives to achieve these measures.
- To complete as a priority the exercise being undertaken by consultants to evaluate the economic consequences of different population scenarios.
- To ensure the collection, analysis and dissemination of timely, accurate and relevant data.
- To ensure that the polluter pays principle is adopted by business.

### **Population**

- To agree a level of population no higher than 89,000.
- To evaluate and agree a series of measures designed to maintain sustainable growth without population growth.
- To develop a smart card system.
- To develop a means of monitoring population changes during inter-census periods.
- To ensure that a Lifelong Learning Strategy is established as a priority.
- To ensure that the States responds to the Clothier Report recommendations in a manner that fulfils internationally recognised principles of sustainability.



- 2.13 The vision for a sustainable future provides the basis for long term strategic planning of all Island activities. The new Island Plan will play an essential role in making it happen.

#### **States' Committees Strategic and Business Plans**

- 2.14 The States of Jersey has established a business plan process to ensure that its strategic policy objectives are achieved through the actions of individual States' committees and departments. The relevant and available Committee Strategic Plans and in some cases, Business Plans have been taken into account in the identification of likely land-use requirements over the Plan period.

#### **Other Key Strategies and Studies**

- 2.15 A large number of studies have been undertaken and strategies produced in recent years that have provided important material to inform the Island Plan, identifying issues and assisting in policy formulation. The findings and implications are dealt with under the relevant topic sections. There are four major studies in the context of the Island Plan:
- 2.16 ***Landscape Character Assessment:*** The character and quality of the Jersey countryside has recently been investigated and recorded in an objective study by Land Use Consultants, leading to a set of recommendations on the protection and management of the Jersey landscape. The findings are presented in the report *Jersey Island Plan Review: Countryside Character Appraisal 1998*.
- 2.17 ***Housing Requirements Study 2000-2002:*** A Housing Requirements Survey was undertaken by consultants David Coultie Associates on behalf of five committees of the States in order to provide information on the housing needs of Island residents. The report on housing requirements was subsequently produced by the Statistics Unit of the Policy and Resources Department in January 2002. The relevance and validity of the 2000 survey was considerably extended by incorporating information on tenure status and residential qualifications from the 2001 Census. The report identifies the five year requirements for homes according to tenure, type of accommodation and dwelling size and for both residentially qualified and those without residential qualifications.
- 2.18 ***Economics of the Housing Market:*** The Law and Economics Consulting Group produced a report in November 2000 on the Economics of the Housing Market in Jersey (known as the Parr Report). It emphasises a pressing need to address both how the demand for housing is managed, through subsidy and policy, and how supply of housing might be increased, for which the new Island Plan is the main mechanism to deliver change.

- 2.19 **The Waterfront Design Framework and Viability Study:** The development policy for St Helier Waterfront was reviewed in 2000 by architectural consultants to evaluate the vision, check progress against the original plan (produced in the early 1990s) and determine how work should proceed in the future. The process of production of the design framework has involved public consultation. A study of the viability of the proposals has since been undertaken.
- 2.20 Other key strategies used in the formulation of policies and proposals in the Island Plan are:
- The Future of Agriculture – draft final report produced February 2001;
  - A Tourism Strategy for Jersey – The Full Report: Tourism Adds Value, October 2000;
  - Jersey Sport, Leisure and Recreation Strategy 1998-2002;
  - Jersey Mineral Strategy 2000-2020; and
  - Sustainable Island Transport Policy.

## **ECONOMIC AND POPULATION TRENDS**

- 2.21 Over the ten years of the new Island Plan there will inevitably be changes in the Island's economy and population. Scenarios as to what may realistically be expected have been identified to provide the appropriate context for land-use change.
- 2.22 The principal influences on future land-use requirements for Jersey will be the performance of the economy and the size, structure and social trends of the population. Of course, predicting how the economy and population will change by 2011 is inherently difficult but some assumptions have needed to be made to determine future land-use requirements. Population policy is a complex issue with many interrelationships and is currently under review by the Policy and Resources Committee, including assessment of the economic consequences of various levels of population. Any changes in policy will have implications for the requirements addressed in the Island Plan.
- 2.23 Clearly the economy and population of the Island are strongly interlinked, with people moving to Jersey to take up employment opportunities. The population will also increase through natural growth, with births exceeding deaths. A rising population leads to a growth in the economy through demand for housing, services and goods.

### **The Economy**

- 2.24 By any international comparison Jersey has achieved remarkable economic success, with growth experienced over many years. Figures at the end of 1998 showed that GNP per head in the Island was more than £19,000 per annum, compared with £15,000 in the UK. At the start of 2001 the Island had full employment and a high standard of living. It is anticipated that the scenario over the Plan period will be one of continued growth in the economy.

- 2.25 It is unlikely that economic growth will continue at the same rate as the last ten years and there are challenges ahead that the States have recognised and are seeking to address. The financial sector represents 55% of GNP and contributes 70% of tax revenues. It is a centre with an international reputation as a place to do business. But the sheer scale of its contribution means that Jersey's economic growth is reliant upon its future wellbeing. However, the importance of the financial sector is clear and the relevant States committees are seeking to ensure its continued presence and future development.
- 2.26 The importance of diversification of the economy to complement the finance sector is recognised. The President of the Finance and Economics Committee stated in December 2000: *"we must be careful not to put all our eggs in one basket...we must look actively – more actively than in the past – at diversifying our economy in order to spread the risk"* (2001 Budget Speech).
- 2.27 The two traditional industries of agriculture and tourism are facing major structural changes. The States recognises that agriculture is an important component of Island life. Farming is faced with increasing competition at a time when Jersey is experiencing high inflation of costs. The next ten years will require significant restructuring, but the States is committed to assisting the industry to meet this challenge.
- 2.28 As with agriculture, the tourism industry is an important sector of the economy but is facing competition and changes that have occurred in international tourism. Again, the States is committed to helping the industry adapt, and Jersey has natural assets that should ensure the industry continues to play an important role in the economy.
- 2.29 It is the intention of the States to achieve economic growth while minimising the requirement for additional employees by encouraging increases in productivity and development of skills of the existing workforce. It is also intended that the introduction of competition should allow economic growth without population growth (under current population policies). Diversification of the economy is an important objective, with new sectors such as e-commerce, media/film and marine leisure identified as having a greater role to play in Jersey's future.
- 2.30 The next ten years will be challenging if economic growth is to be sustained, without bringing with it further pressures of population growth and inflation. The new Island Plan will contribute to meeting these challenges.

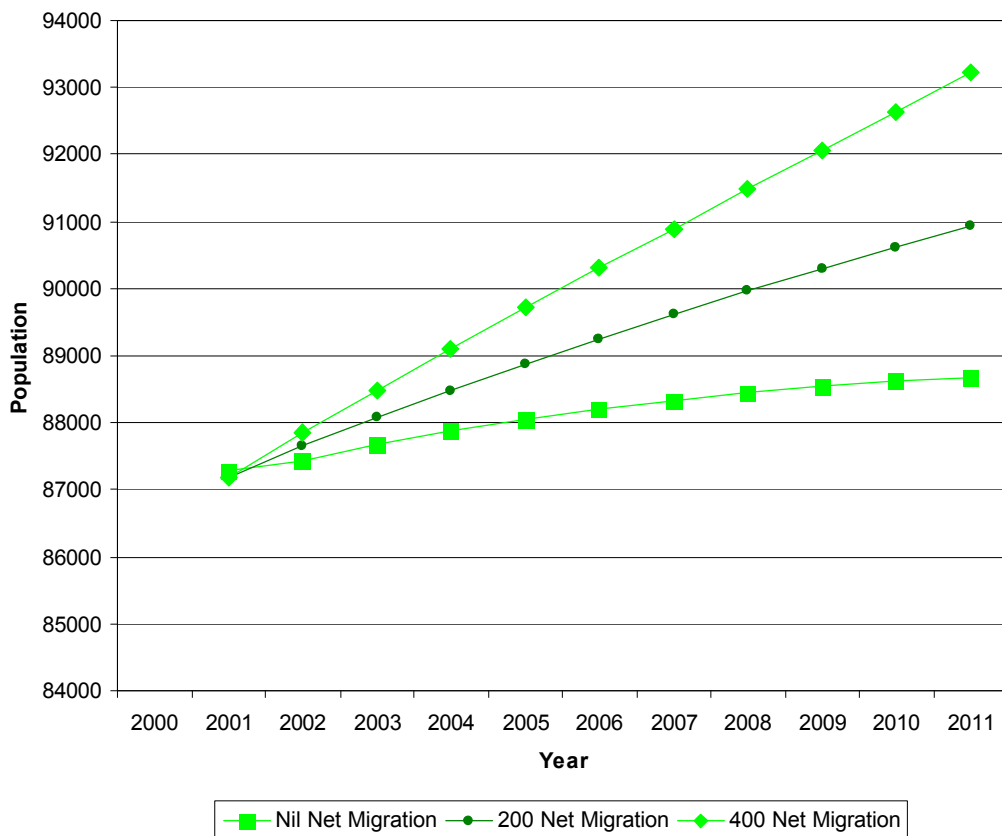
## Population

- 2.31 There has been continuous growth in population since the Second World War. There can be little doubt that this growth has been, and continues to be, a major challenge. The States of Jersey has repeatedly been engaged in trying to balance the economic and social benefits of a healthy economy with the requirement to minimise immigration.
- 2.32 Forecasting the future level and structure of population is important to enable assessment of the likely demand for future development and services but it is a difficult process. The 1987 Island Plan was based on the assumption that population growth would be controlled in accordance with States' policy. However, within a few years of its publication population levels had outstripped the predictions. The new Island Plan is however, able to use very up to date data on population and households, from the 2001 Census.
- 2.33 The 1995 *Strategic Policy Review – 2000 and Beyond* stated that the resident population should be 'the same as, or less than, the current level' as a vision for the Island (for example, the level in September 1995 was around 85,000). The population recorded in the 2001 Census was however 87,186, a growth of 2,036 since 1996 and 3,104 since 1991. This growth has arisen through both in-migration and a natural increase of births over deaths, the latter representing the most significant proportion of change.
- 2.34 In the context of developing the new Island Plan, it is important that forecasts are based on States' policy, but also incorporate a level of contingency to accommodate different rates of net immigration and population growth, especially in view of:
- the continued growth in the economy and the associated pressures to allow immigration;
  - the inability of the States to control population and immigration on previous occasions, despite its stated intentions to do so;
  - the vulnerability of population projections to changes in the underlying assumptions, especially as Jersey is a micro population;
  - the level of net inward migration, which, despite the effects of a recession in the early 1990s, averaged nearly 400 annually between 1981 and 2000.
- 2.35 The Statistics Unit of the Policy and Resources Committee has produced population forecasts for future migration scenarios, which include:
- nil net migration;
  - net migration of 200 persons per year;
  - net migration of 400 persons per year,

The 2001 Census population has been used as the base year for forecasts. The forecasts are contained within '2001 Census – Bulletin Three, Population Projections for Jersey, January 2002'.

2.36 The Planning and Environment Committee has decided to take the scenario of 200 net migration per annum as the appropriate basis for the new Island Plan. This represents a level of growth from net in-migration above that experienced between 1991 and 2001 during which there was a continuous movement of people into and out of the Island resulting in a net average in-migration of approximately 55 people per annum. Under the 200 net migration scenario, it is estimated that there will be some 3,763 additional people in the Island in 2011.

**Population Projections for Jersey 2001-2011**



2.37 The choice of the scenario of 200 net migration does not mean that if growth is greater or less than this scenario, changes cannot be accommodated by the new Island Plan. This figure does not represent a target but provides a framework within which to plan. The policies and proposals of the new Island Plan provide appropriate mechanisms for bringing additional requirements forward. The adoption of a process of regular monitoring and review is, however, essential to facilitate this.

### **Households**

2.38 There were a total of 35,563 private households recorded in the 2001 Census. This was an increase of 3,200 since 1991 although there has been a change in the way the figure is calculated. Average household size has continued to reduce, falling from 2.59 persons per household in 1981 to 2.38 in 2001. An estimate has been made by WS Atkins of the number of private households in 2006 and 2011. The estimate assumes that average household size will continue to fall in line with long-term trends and that the proportion of residents in non-private households will remain constant to 2011.

2.39 Table 2.1 shows the estimated increase in population and households to 2011 for the scenario of 200 net in-migration per annum.

**Table 2.1: Population and Household Projections to 2011**

Year	Population	Average Annual Increase in Population	Population not in Private Households (constant)	Number of Private Households (average household size)	Average Household Size	Average Annual Increase in Households
1996	85,150	-	3,898	33,702	2.41	-
2001	87,186	407	2,388	35,563	2.38	372*
2006	89,258	414	2,410	37,274	2.33	342
2011	90,949	338	2,456	38,643	2.29	274
<b>2001-2011</b>	<b>+3,763</b>	<b>376</b>	<b>+68</b>	<b>+3,080</b>	<b>-</b>	<b>+308</b>

\*Note: Method of calculation of private/non-private households has changed between 1996 and 2001 to include those in private lodgings as separate households.

2.40 The projections indicate a total increase of 3,763 in the population and 3,080 households by 2011 and an average annual increase of 376 in the population and 308 in the number of private households.

### **Age Structure**

2.41 Over the Plan period to 2011 with all its scenarios, there will be a significant increase in the numbers of people aged over 65 and a reduction in the numbers of children under sixteen. The dependency ratio however (the proportion of those of school age or retired) varies for the scenarios. With the scenario of nil net migration, 36% of the population would be children or retired, compared with 35% for net migration of 200 per annum and 34% for net migration of 400 per annum. The difference between scenarios becomes more evident in the long term, with 45% of the population being 'dependent' in 2031 in a nil-migration scenario compared to 43% for 200 net migration and 42% for 400 net migration.

## Implications of Economic and Population Scenarios

- 2.42 The implications of all the scenarios show the importance of the economy and population changes for the new Island Plan. They also demonstrate just how critical it is that the States develop strategies for managing change in employment levels and population. While the short term differences between scenarios may not be significant, over the longer term impact would be much more marked; by the year 2031 there would have been minimal overall population change if the Plan assumes nil net migration (an increase of 1,500 people), but if net migration of 400 per year is assumed, the Island's population would stand at 106,200 and there could be a need for an estimated 8,100 more homes than in 2001 (assuming an average household size of 2.29).

## KEY CHALLENGES

- 2.43 The first stage of the review of the Island Plan was to establish the current situation and confirm the key issues that the Island Plan needs to take into account. The issues are fully discussed in the Issues Report (July 2000) and are summarised as key challenges for the Island Plan.

<b>Key Challenges for the Island Plan</b>	
<b>Countryside and Marine Environment</b>	<ul style="list-style-type: none"> <li>➤ Help protect the special qualities of the countryside and marine environment as well as support the agricultural sector.</li> <li>➤ Recognise that there are pressures for new development and changes in the rural economy.</li> </ul>
<b>Built Environment</b>	<ul style="list-style-type: none"> <li>➤ Ensure adequate protection for areas and buildings of historic or architectural character.</li> <li>➤ Put in place standards for building heights, design and amenities that are appropriate to the creation of a quality urban environment.</li> <li>➤ Ensure the protection and adequate provision of open space.</li> </ul>
<b>Housing</b>	<ul style="list-style-type: none"> <li>➤ Meet housing needs – including housing that is affordable, meets the needs of families, the elderly and those without residential qualifications – while making better use of land and buildings and avoiding development of the countryside.</li> <li>➤ Balance the need for more development in the urban area with achieving a high quality living environment.</li> </ul>
<b>Social and Community</b>	<ul style="list-style-type: none"> <li>➤ Address the needs for education and health care facilities.</li> <li>➤ Determine how the needs of community services can be best accommodated in the Island.</li> </ul>
<b>Industry and Commerce</b>	<ul style="list-style-type: none"> <li>➤ Balance the requirements for offices, industrial and warehousing premises with protecting the environment and providing for other land-uses.</li> <li>➤ Satisfy the need to diversify into new industries.</li> <li>➤ Assist in meeting the challenges of changing opportunities such as e-commerce and working from home.</li> <li>➤ Protect and improve the quality and range of shopping provision.</li> </ul>

<b>Key Challenges for the Island Plan</b>	
<b>Tourism and Recreation</b>	<ul style="list-style-type: none"> <li>➤ Assist the tourism industry in adapting to changes and attracting new tourist markets.</li> <li>➤ Help to ensure that the tourism assets of the Island are protected to assist in sustaining and developing the industry – the coast and countryside, accommodation and facilities.</li> <li>➤ Protect and promote sport and recreation facilities and help to accommodate the growth in leisure demand.</li> <li>➤ Resolve possible conflicts between the desire for international standard facilities and the need for local facilities.</li> </ul>
<b>Travel and Transport</b>	<ul style="list-style-type: none"> <li>➤ Assist in reducing the need to travel and improving accessibility for all.</li> <li>➤ Improve safety and reduce the impact of traffic on the environment.</li> <li>➤ Encourage a change in the way we travel, leading to greater use of public transport, cycling and walking.</li> </ul>
<b>Natural Resources and Utilities</b>	<ul style="list-style-type: none"> <li>➤ Decide the extent to which the availability of services, particularly water supply and the foul sewer network, determine the location, extent and timing of new development.</li> <li>➤ Bring about opportunities for energy conservation and use of renewable energy.</li> <li>➤ Protect natural resources against sterilisation from other development and safeguard for future use.</li> </ul>
<b>Waste Management</b>	<ul style="list-style-type: none"> <li>➤ Devise land-use policies that can realistically minimise waste production and encourage the re-use of materials.</li> <li>➤ Minimise potential environmental impacts of recycling and composting facilities.</li> </ul>