

STATES OF JERSEY



COMMON POPULATION POLICY

**Lodged au Greffe on 10th December 2021
by the Council of Ministers
Earliest date for debate: 8th February 2022**

STATES GREFFE

PROPOSITION

THE STATES are asked to decide whether they are of opinion –

- (a) to adopt the inaugural Common Population Policy for Jersey as set out in the accompanying Report; and
- (b) to request that the Council of Ministers should include its policy on population in future Government Plans from 2023 onwards.

COUNCIL OF MINISTERS

REPORT

The inaugural Common Population Policy of the Council of Ministers is set out in the Common Population Policy Report, attached to this proposition as Appendix 1 below.

Financial and manpower implications

The actions set out in the inaugural Common Population Policy are based on existing programmes and projects as set out in the Government Plan 2022-2025.

As such they do not require any additional financial or manpower resources, over and above the Government Plan proposals..

Appendix 1

Common Population Policy Report 2021

Common Population Policy 2021

Ministerial Foreword	3
Executive Summary	5
Introduction	9
1. Future role of population policy in overall Government activity.....	9
2. Aim of the Common Population Policy	10
2.1 First steps.....	10
3. Targets, limits & forecasts	10
3.1 Current population planning assumptions	12
3.2 Future population assumptions	15
3.3 Setting a net zero target	15
4. Data	16
4.1 Population Growth	17
4.2 Ageing Population.....	23
4.3 Housing	25
4.4 Infrastructure	26
4.5 Health.....	28
4.6 Benefit expenditure.....	28
5. Consultation	29
5.2 Focus Groups	30
5.3 Public survey results	32
5.4 Students and Young People	36

5.5	Industry, stakeholder and individual consultations.....	38
6.	What will the annual population policy report include?	42
7.	Ministerial priorities and responsibilities	43
7.1	Making better use of data	43
7.2	Encouraging and enhancing productive activity within the resident population.....	47
7.3	More Responsive Controls	57

Ministerial Foreword

Jersey's population has been a matter for debate for hundreds of years – in the 1300s (population estimate: 12,000) fears were expressed that Jersey was becoming 'dangerously overcrowded.' More recently, successive governments have struggled with the issue of population, either seeking to introduce measures to restrict the annual inward flow or applying a ceiling to the overall number of people living in the Island. Despite these attempts, the population has continued to grow.

I am proud to provide this foreword to the first Common Population Policy, now a legal obligation of each Council of Ministers. Getting population issues at the centre of government thinking is the only way we are going to resolve this knotty challenge.

As a society we have all benefited from the economic growth fuelled by inward migration over the last 60 years. But has this historic growth come at an unacceptable cost to the Island and is it now time to pull up the drawbridge? To those who believe that Jersey's unique character and identity is being lost forever as a result of sustained population growth, the answer is undoubtedly yes. Those seeking to recruit nurses and social workers, or trying to operate businesses in hospitality, retail, healthcare, finance or construction and finding it impossible to find the staff they need, would probably take the opposite view.

I see this as a pivotal moment for Jersey. The shockwaves of Brexit and Covid-19 continue to reverberate through our Island and just over the horizon up to a third of jobs that exist today could be lost to automation by 2035. Economic productivity remains stubbornly low and many young people do not see a long-term future in the Island as a result of rising costs. Furthermore, in common with most developed societies our population is ageing, as better nutrition and healthcare means people are living longer, so the cost of supporting them will need to be borne by a proportionately smaller working-age population.

The focus of this inaugural Common Population Policy is to explore what the Government can do in response to the ageing of the population and the more immediate challenge of the reduction in supply of labour arising as a consequence of Brexit and the Covid-19 pandemic. We must prioritise education, skills and lifelong learning to ensure that our citizens are equipped to do the jobs that local businesses are going to need, and grow our talent pipeline for the future. We must look forward, to a time when jobs that exist today may be lost to automation and new skills will be required. We will also concentrate on reducing reliance on our migrant workforce by maximising the contribution of the people who are already here, through improvements in productivity, increased workforce participation and the adoption of new technology.

Truly reducing the Island's reliance on net inward migration as part of a sustainable population policy requires a joined-up approach across all Ministerial areas of responsibility. This policy identifies initiatives which are already advancing this aim and suggests areas for further development and action. Our aim is to set broad principles, viewed through the lens of population, to help in the goal of achieving a stable and sustainable population for future generations.

The quality and scope of data available today is a significant barrier to the development of a comprehensive population policy. This first policy emphasises the need to improve our data collection. This includes the introduction of a new IT system to support the administration of the Control of Housing and Work Law and the publication of the detailed results from the March 2021 Census as well as other systems, currently under development, which will ensure more robust data is available in future.

Any population policy must be backed up by effective and responsive controls and amendments to the Control of Housing and Work law will be debated next year to give the Government the levers it needs to control future migration.

Despite the challenges, we must act now and our goal, over time, must be to achieve a stable population. Given the constraints of the data we currently hold, it is not feasible to say with

certainty when this will be achieved, but we will place an obligation on successive Councils of Ministers to report progress towards this goal on a regular basis and at least once during their term of office. As data gathering improves, alongside the other proactive measures set out in this policy, reliance on inward migration will reduce.

In its recent report, the Island Identity Policy Development Board asked a very simple question: 'What makes Jersey special and why does that matter?' and one of its key findings was that public policies should coherently support and help to develop Jersey's distinct identity. Population policy must take account of Jersey's unique characteristics and seek to preserve them, but equally we cannot stand still and let the world pass us by. Islanders' views have been listened to and taken into account in developing this policy, and this must continue, because we all have a part to play in preserving our Island's unique character and ensuring we are best placed to face the challenges that lie ahead.

This first policy document is inevitably constrained by the limitations of available data and will be the first of many iterations. The Common Population Policy will evolve over time and reflect the priorities of the next and successive Councils of Ministers, building on the foundations that we are setting out in this Policy.

As you read this report, bear in mind that there are no silver bullets to solve the population dilemma, but it affects every one of us, so we must confront these challenges head-on together. It is only by everybody playing their part that we will begin to make progress and the vision of population stability, ensuring a sustainable future for everyone who lives in Jersey, will become a reality.

A handwritten signature in blue ink, consisting of a large, stylized 'R' followed by a horizontal line that tapers to the right.

Deputy R.E. Huelin
Assistant Chief Minister

Executive Summary

In September 2021 the States Assembly agreed to update the States of Jersey Law to include a requirement for the Council of Ministers to maintain a common population policy and to update that policy on an annual basis. This is the first common population policy to be published by the Council of Ministers.

This policy document includes an overview of the current position and identifies actions for 2022 that fall within the current plans set out in the published draft Government Plan 2022-2025 and the draft 2022 departmental business plans which will be published in January 2022. As the first common population policy report, it also sets out a proposed format and content for future reports.

The overarching aim of the common population policy of the Council of Ministers is *‘to progressively reduce Jersey’s reliance on net inward migration within the currently agreed common strategic policy.’*

This aim acknowledges the importance of setting a long term vision to control the future growth of the population but at the same time recognising that future short-term challenges may require short-term solutions.

There have been many attempts to set specific targets for population in the past but the population has continued to grow, with an estimated 107,800 residents in Jersey in 2019. There are three specific areas where the Council of Ministers believes that action must be taken to ensure that its population policy can be maintained in the long term and can successfully reduce the need for inward migration:

- i) previous governments have failed to collect accurate and timely data in order to effectively monitor the current position and adjust policies. A key theme of the Common Population Policy is that the depth and breadth of data collected and analysed by the Government must be significantly improved in order to inform population actions;
- ii) economic activity in recent years has often been based on migrants to provide a larger workforce rather than looking to the potential of the resident population. Actions to support the development and participation of everyone already living in Jersey are prominent in this first common population policy; and
- iii) earlier this year, the States Assembly supported P.137/2020 which set out the framework for a more responsive set of migration controls. These are currently being developed and will be implemented in 2022. In particular, the updated law will include stronger controls on the number of individuals in the future who gain the right to settle permanently in Jersey.

In line with the decision of the States Assembly to approve P.120/2020, the Council of Ministers has considered the option of setting a nil net migration target. Given the current lack of robust data and the significant areas where action is needed to develop a coherent population policy, Ministers have concluded that it is premature to set any specific population target, including a nil net target.

The Council of Ministers considers that the aim of its Common Population Policy should be to achieve a stable population position for Jersey, where reliance on inward migration has been significantly reduced in the longer term. The target date for achieving population stability will be set during the term of the next Council of Ministers, and subsequent Councils will publish details of their progress towards the stability target at least once during their term of office. It is envisaged that by 2025 data collection and analysis will be sufficiently advanced to make a meaningful, evidence-based forecast.

At present, different areas of government activity use different assumptions for future population growth. These range from +700 net inward migration used by the Fiscal Policy Panel up to +1000

used as part of the outline business case for the Our Hospital project. The Bridging Island Plan identifies the need for Ministers to work together to develop consistent long-term population assumptions.

The Migration Policy Development Board collated a range of data during 2019 that was included in its final report published in January 2020. Significant improvements in data analysis and collection are planned for 2022.

- full results of the 2021 Census will be published during 2022;
- alongside amended legal controls, a new IT system is being developed to manage the CHW application process; this system will provide a monthly report on the number of migrant workers employed across different sectors of the economy as well as providing longitudinal data which tracks migrants over time;
- a new Combined Employer Return system will be launched in January 2022, collecting tax, social security and manpower information on a monthly basis; and
- across the whole of Government, data linkage infrastructure is being designed to link administrative data sets held by different departments. This will create a data warehouse that will be able to provide valuable information on overall population trends.

While developing these new data sources, appropriate data governance arrangements will also be established.

There has been significant population growth in Jersey since 1951, with much of this growth driven by inward migration. Statistics Jersey have produced a range of scenarios showing estimates of future population under different migration assumptions. These estimates include a breakdown by age of the future population. With or without net migration, the number and proportion of people aged over 65 increases steadily over the next 50 years. Even with net migration of +700 a year over this period, there will still be an increase in the dependency ratio, i.e., the ratio of the number of people aged over 65 or under 16 compared against the number of people aged between 16 and 64.

A recent study 'Impacts of an ageing population on Jersey's Economy'¹ looks in detail at the impact of this ageing demographic on both labour supply and consumption. People aged 65 and above will become a larger part of the total economy which provides opportunities for new businesses. Encouraging people in this age group to remain in employment will be an important element of reducing the need for inward migration.

The demand for housing on the island will increase, even under a nil net migration scenario, as average household sizes continue to decrease. An assessment of housing needs has been made for the Bridging Island Plan at 750 homes per year or 3,750 homes by the end of 2025. The Census of 2011 identified a significant level of under-occupation, particularly among older people's households. The results of the 2021 Census will be carefully considered to identify the current level of under occupation. Infrastructure planning takes place over the long term and an infrastructure roadmap is currently under development to identify appropriate long-term infrastructure targets. Data on health and benefit costs shows the increasing costs of an ageing population.

The development of this population policy has taken account of extensive consultation between May and October 2021. A series of focus groups was run by an independent organisation, a public survey was distributed and received over 1,700 responses and multiple meetings were held

¹ [R.182-2021.pdf \(gov.je\)](#)

with individuals and stakeholders. A separate online survey was aimed at off-Island students and recent graduates.

The consultation responses provide a detailed picture of the wide range of views held locally. There was clear support for more action to be taken to improve education and skills training in the Island to reduce the need for inward migration. Support for individual actions (working longer, paying more tax, reduced public services, etc) was limited in the online survey but much stronger in the focus groups following a structured conversation. The majority of individual respondents considered that the population was already too high whereas the majority of business respondents identified the need for additional staff. The lack of availability of accurate data on population issues was a clear feature of the consultation responses and Ministers agree that actions are needed to improve the flow of information to the general public.

Ministers suggest that future policy reports should be coordinated with the annual Government Plan and should contain a range of information on current data sources, a summary of actions taken, advice received and a commitment to proposed short and long-term actions.

Net inward migration peaked recently at 1,500 in 2015. While still high, the net value has decreased steadily each year until 2019 (the last available estimate). This suggests that existing policies are already helping to reduce the dependence on inward migration and these policies will be maintained and strengthened in the coming year.

The need for accurate and timely data is a theme that runs through this policy report. Actions in 2022 include the publication of the 2021 Census results, the implementation of a new IT system to manage applications and report on under the Control of Housing and Work Law and the introduction of a monthly Combined Employer Return. A project to create links between administrative data will lead to the development of ongoing estimates of overall population levels. Actions in specific areas include a full review of the health and social care needs of the population, the development of a long-term infrastructure roadmap, actuarial reviews of the Social Security funds and the creation of a register of property ownership.

As well as gathering improved data across government, Ministers are clear that this information must be communicated effectively to the public to allow everyone to participate fully in future discussions.

Supporting individuals and businesses to fulfil their full potential is a key theme of this policy. This includes supporting the productivity of existing businesses and developing new sectors in line with an agreed Future Economy Framework. Ministers will take action to improve educational services for our children and young people and equally, improve and extend the skills training available to adults. It is vital that we make the most of new technology across every business sector.

Many workers today drop out of the labour market with long term health conditions. Ministers will act to support workers at an early stage to minimise the impact of ill health and support workers to remain productive. The public sector is a major employer and must lead the way in improving productivity, using technology and supporting workers to gain new skills.

A successful population policy must include responsive and proportionate controls to allow the Government to manage the flow of people into the Island. Brexit has had a major impact on immigration controls, which now apply to all nationalities except British and Irish (The Common Travel Area). Specific immigration routes to support the local economy have already been established and this work will continue in 2022. The Control of Housing and Work (CHW) law applies to all adults legally in Jersey, regardless of nationality. States Members supported changes to the CHW controls in March 2021 and law changes will be debated in early 2022 with detailed regulations following later in the year. The amended controls will allow for long and short term permissions and will allow improved control over the number of migrants receiving permission to live permanently in Jersey.

In addition to actions for 2022, Ministers have suggested some medium term actions to be considered in future years. These include a review of ministerial responsibilities in respect of Skills and the interaction between responsibility for immigration and migration controls. Subject to the outcome of actuarial reviews in 2022, Ministers suggest an extension to the pension age should be considered. Finally, subject to an appropriate technology platform being available, Ministers propose that a robust and secure digital ID system is introduced.

Introduction

The Council of Ministers has committed to investigate issues of population, migration and immigration control, and to develop a common population policy for Jersey.

As a small island, Jersey has been successful over hundreds of years as a maritime trading nation, with local people exploring new nations around the world and others arriving from foreign lands, settling here and adding to the richness of island heritage and culture.

The local economy today is built upon the hard work and enterprise of those born in the Island and those that have chosen to make their lives here. The role of a common population policy is to ensure that the Government recognises the value of each person and helps to maximise their contribution to our environment, our society and our economy.

The States Assembly has agreed that future Councils will be responsible for agreeing an updated population policy on an annual basis. The Assembly has also agreed the structure of changes to migration controls, for which law drafting is underway and legal and operational implementation planned for 2022.

This document breaks new ground in drawing together a range of policies from across government and identifying actions that will be taken to support the development of a long-term and overarching common population policy.

Given the scale of the challenge there will be no easy or quick solutions, and this document does not attempt to identify all the answers to issues that have concerned politicians and residents for many years. It does however set a vision for the future as well as providing for clear short-term actions and creating a structure within which longer term aims can be holistically and systematically considered and consensus solutions identified and implemented.

This document also responds to the commitments agreed by the Assembly in P.120/2020².

1. Future role of population policy in overall Government activity

Each new Council of Ministers is required to publish a statement of its Common Strategic Policy (CSP) upon taking office. Within this high-level framework, annual Government Plans then allocate funding and resources to individual areas of government activity.

The Assembly has now agreed that, in addition to this existing structure, the Council of Ministers will maintain and update at least once a year, a Common Population Policy - i.e., a policy that is shared and owned equally by all ministers.

Population issues build up over many years and require long-term commitments to resolve. These issues will endure during times at which the Island is meeting other more immediate challenges or seeking to make progress in new areas. The population policy must sit within the overall CSP and Government Plan structure, maintaining relevance from year to year, while not necessarily dominating government actions in any particular year.

To achieve this, the annual review of the population policy will be included within the overall Government Plan process from Government Plan 2023-26 onwards.

² [P.120/2020 'Migration and Population Data'](#)

2. Aim of the Common Population Policy

The overarching aim of the common population policy of the Council of Ministers is:

“to progressively reduce Jersey’s reliance on net inward migration within the currently agreed Common Strategic Policy”

The policy is based on two clear principles:

The population of Jersey lives on a small island and an ever-growing population would put more and more pressure on finite land resources. As such, the government will take action to reduce the need to grow the population further through net inward migration whenever this is feasible. The long-term aim of the population policy should be to achieve a sustainable rate of population change, to ensure that current generations do not pass on a growing problem to future generations while ensuring that Jersey remains open for business.

Within the long-term aim of reducing reliance on continued inward migration, the Government will always face new challenges and there may be situations in which the long-term aim of reducing the need for net inward migration will need to be paused or even reversed in order to address specific challenges from time to time. Notwithstanding any such temporary challenges, the underlying principle and vision remains a long-term reduction in reliance on net inward migration.

2.1 First steps

As set out in more detail below, this first Common Population Policy is inevitably limited in the scope of its ambition. However, there are significant projects already in progress that will lead to further actions in future years. As well as the Census results, the output of the major project on the Future Economy will be available in 2022 and this will help guide the development of a coordinated skills programme, to target areas where growth is desired and skills gaps exist. In the immediate term ongoing migration will be necessary to meet current skills gaps but the new migration control measures will help to minimise the number of new residents who gain the right to remain permanently in Jersey. At the same time the emphasis on increasing productivity will start to reduce the need for additional workers in these sectors. Complementary education, health and housing policies can then be put in place to support the agreed Common Population Policy.

The detailed Census results that will be available in 2022 will provide rich evidence of the resident population as at March 21. However, on its own, a 10-yearly census cannot provide the data that is needed to maintain an effective population policy from year to year. Steps will be taken next year to start to expand and deepen the information available to decision-makers in respect of population issues. These steps will need to be built upon in future years to develop a truly robust data system that tracks all aspects of population policy.

3. Targets, limits & forecasts

In recent history Governments have proposed various iterations of population and/or migration policies that have included a target or limit as their overarching premise:

- **1995:** “2000 and beyond” Strategy – States’ policies should be designed to achieve ‘a permanent resident population the same or less than the current level’ (estimated 85,000);

- **1999/2000:** population to remain at the same level as autumn 1995;
- **2004:** a cap of 1% per annum on the increase in the working population;
- **2009:** allow maximum inward migration at a rolling 5 year average of no more than +150 households per annum (equivalent to net +325 people) to be 'reviewed and reset' every 3 years; and
- **2014 - Interim Population Policy 2014-2015** Net migration +325 people per year.

Whilst the matter of population or migration controls have spanned a number of elections, these policies have often met with public challenge and the statistics show that overall they have failed in controlling the net inward migration rate and overall population of the Island.

The resident population of Jersey at year end 2019 was estimated at 107,800.

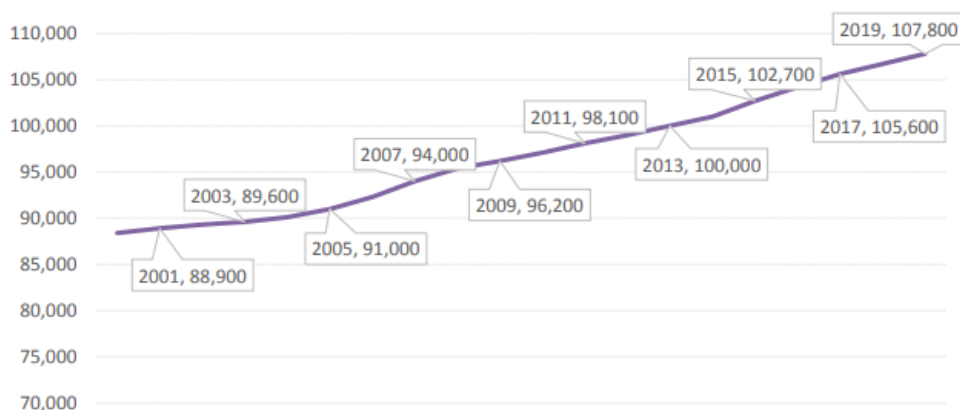


Figure 1: Total resident population at year end, 2000-2019 (source, Statistics Jersey)

The levers that government has to control population are limited. Government does not directly control the birth or death rate, nor the number of people who emigrate. Local residents bring partners to the Island, and a significant number of people (currently estimated at c.20,000) who currently live outside the Island are entitled to return to live in Jersey at any time. Meanwhile there will always be some roles or skills that are essential to the Island that cannot be met by the resident population and which require individuals to be brought to the island. While Jersey remains a member of the Common Travel Area (CTA)³, its borders are open to all CTA residents. Although the Control of Housing and Work Law regulates access to local housing and employment, it does not create a border control.

The lack of success from previous governments in controlling overall population numbers can be attributed to a range of factors. Three of these are particularly pertinent to this first population policy report:

- i) the lack of data to effectively monitor the actual population has prevented governments from being able to adjust policies quickly. This report will set out the improvements in data collection that are planned for 2022 onwards;

³ CTA: Great Britain, Ireland and Crown Dependencies – Total population roughly 73 Million

- ii) the need to rely upon growing the working age population to increase business activity and maintain and grow government revenues. This report will set out a range of actions aimed at expanding and enhancing the economic, social and voluntary activities of the resident population to reduce the need for continued inward migration; and
- iii) the lack of effective controls to limit the number of migrants who have the right to settle permanently in the island. P.137/2020 addressed this issue and this report sets out progress on amendments to the Control of Housing and Work Law that will be implemented in 2022.

At this early stage, it is considered premature to identify any numeric targets for either total population or population growth. We do not have the data or analysis that would provide the evidence to substantiate the choice of any kind of target at present. However, it is clear from the information that we do have that any sudden reduction in the workforce in the short term by placing significant limits on future inward migration would lead to a drop in government revenues at a time of rising costs and would lead to a need to increase taxes or reduce public services. The very clear consensus of the Council of Ministers is that every effort should be made to progressively reduce Jersey's reliance on inward migration. To achieve this, actions are needed across many fronts and data does not yet exist to be able to judge the likely impact of these actions on the overall migration figure.

The Council of Ministers considers that the aim of its Common Population Policy should be to achieve a stable population for Jersey, where reliance on inward migration has been significantly reduced in the longer term. The target date for achieving population stability will be set during the term of the next Council of Ministers, and subsequent Councils will publish details of their progress towards the stability target at least once during their term of office. It is envisaged that by 2025 data collection and analysis will be sufficiently advanced to make a meaningful evidence based forecast.

However, whilst a target for population growth does not form part of this first common policy, much government activity requires forward planning and estimates of future population levels are often used by Government and included in this planning. Some of these are explored below.

3.1 Current population planning assumptions

Bridging Island Plan

As set out in the Island Plan Review Preferred Strategy Report⁴, the current draft Bridging Island Plan adopts a near-term planning assumption of growth in the island's population of around 4,000 people over the five years covering 2021-25, based on an average annual increase of +800 per year. The near-term planning assumption is used to inform analysis of housing demand, the spatial strategy and, subsequently, site selection for the draft Island Plan. The development and adoption of this near-term planning assumption has been informed by available evidence and trends related to population dynamics and changes to demographic profiles; the anticipated impact of future government policies relating to migration; and informed assumptions regarding the impact of the coronavirus pandemic and Brexit on inward migration and population change.

For the purpose of long-term infrastructure planning, the draft Bridging Island Plan also identifies a more broadly drawn planning assumption with an average annual population growth of +1,000, which extends over the medium to long-term horizon (5-15 years). Infrastructure projects are generally of higher complexity, cost, and contention than other developments, which requires the

⁴ [Island Plan Review Preferred Strategy Report - gov.je](https://www.gov.je/Island-Plan-Review-Preferred-Strategy-Report)

planning process to generally start a number of years before the infrastructure is expected to be required. Sensitivity to population increase is lower when there is existing capacity in infrastructure systems to withstand future growth, but when there is little capacity in the system, the sensitivity to population increase sharply rises and can carry greater risks; this would be most severe for critical services and utilities. Because of these identified risks, a higher population growth assumption for infrastructure helps to ensure that planning can begin with adequate lead-in time.

Infrastructure Capacity Study

The Infrastructure Capacity Study⁵ is being used to inform the development of an infrastructure roadmap for Jersey. The roadmap will inform both short and long-term strategic policymaking and help Government to understand the costs and consequences to the environment, economy and wider society when making key future infrastructure choices.

Consistent with the approach adopted in the draft Bridging Island Plan, the Infrastructure Capacity Study utilises a near-term planning assumption of growth in the island's population of around 4,000 people over the five years covering 2021-25, based on an average annual increase of +800 per year, and for the period beyond the Bridging Island Plan (the next Island Plan will cover the period 2025-2034) a broadly drawn planning assumption of average annual population growth of +1,000 per year has been used. The development of the roadmap will have regard to the long-term planning assumption which shall be developed to inform the next Island Plan period, having regard to the latest available data and economic trends.

Our hospital

The Our Hospital Outline Business Case⁶ has made use of Statistics Jersey's +1,000 per annum net migration population projections to estimate an age-adjusted growth for services over the period up to 2036 to inform demand and capacity modelling for a new hospital.

Fiscal Policy Panel

The FPP's Advice for the 2020-23 Government Plan⁷ discusses growth in the working-age population varying significantly depending on the expectations for future migration patterns. Considering the recent past trend where net inward migration averaged +880 over the 10 years to 2017, the Panel has based its calculations on +700 net inward migration over the next decade. This scenario results in continuing growth in the working-age population, growing at around 0.5% per year to 2020, before slowing to around 0.3% from the mid-2020s onward.

⁵ [R Infrastructure Capacity Study Report 2020 ARUP.pdf \(gov.je\)](#)

⁶ [OHP Outline Business Case 130721.docx](#)

⁷ [Fiscal Policy Panel Advice for 2020-23 Government Plan](#)

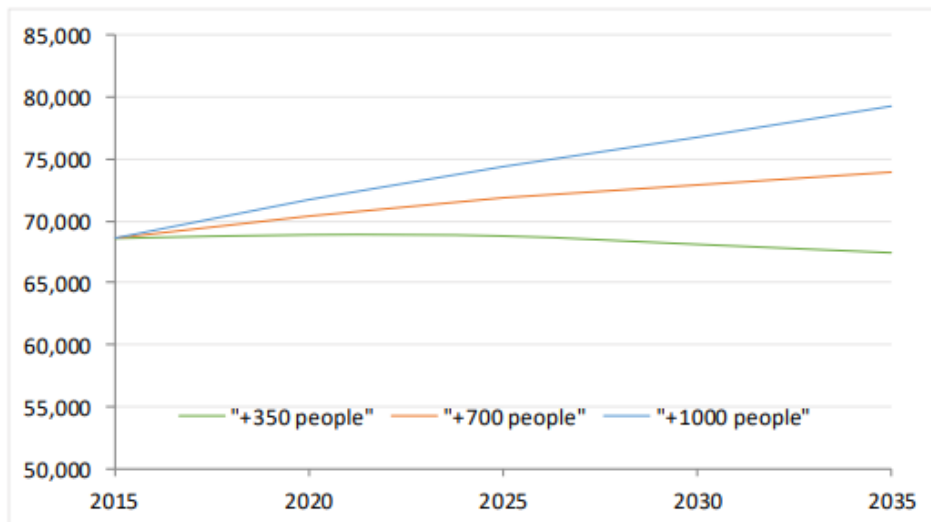


Figure 2: Working-age population Projections for working-age population under differing scenarios for migration. Sources: Statistics Jersey

The overall average growth rate from 2020 to 2030 is 0.3% under the +700 scenario. This varies significantly under the other migration scenarios, with +350 resulting in a fall of 0.1% per year in the working age population and +1,000 resulting in an annual growth rate of 0.7%. The Panel has included these alternative population projections as the low and high scenarios respectively.

Social Security Funds

The Social Security Fund, the Health Insurance Fund and the Long-Term Care Fund (LTCF) are ring fenced funds under the control of the Social Security Minister. Each fund is subject to actuarial reviews on a regular basis. These reviews project forward several decades to assess the viability of each fund based on assumptions including an assumption of population size. The most recent review⁸ of the Social Security Fund, which provides the old age pension, was completed in 2019. It included a central assumption of net inward migration of +700 per annum, with calculations also provided for +325 and +1000. The next review will be undertaken during 2022 and population assumptions will need to be set at that time. The same population assumptions (+325, +700, +1,000) were also used in the most recent reviews of the other two funds^{9,10}.

In line with the goal of reducing reliance on inward migration, the Council of Ministers proposes that the next actuarial review of the Social Security funds should include evaluation of the effects of a nil-net migration scenario.

Why are different population assumptions used?

It should be noted that different assumptions are made by different bodies and according to the purpose for which the assumption needs to be made. The FPP assumption of +700 relates purely to inward migration and takes no account of natural population growth (the number of births and deaths). The Bridging Island Plan includes natural growth and therefore uses an assumed increase of +800 per annum for the period to 2025, whilst the Infrastructure Capacity Study and Our Hospital Business Case take a longer term view and therefore have assumed a higher growth in their modelling.

⁸ [Report on the financial condition of the Social Security Fund as at 31 December 2017.pdf \(gov.je\)](#)

⁹ [Report on the financial condition of the Health Insurance Fund as at 31 December 2017.pdf \(gov.je\)](#)

¹⁰ [States of Jersey Long Term Care Fund \(gov.je\)](#)

3.2 Future population assumptions

With the introduction of a common population policy, it is important that there is a consistent approach to short, medium and long-term planning across all government activity. This need has also been recognised in the Bridging Island Plan, published earlier this year. This included:

Strategic Proposal 1 – Development of a long-term planning assumption

Ministers will work together to develop a long-term planning assumption, with a clear and comprehensive methodology, for the next and future Island Plans, that reflects and responds to:

- the migration control policy;
- the forthcoming population policy;
- the findings of the Future Economy Programme; and
- the future development of wider relevant policies, including skills.

The publication of this Common Population Policy emphasises the need for joint working and Ministers commit to working together to co-ordinate forward planning work across all areas and to set out agreed population planning assumptions for short, medium and long term planning purposes.

Part (b)¹¹ of P.120/2020 seeks to align population targets in the Common Population Policy with population assumptions made in future Island Plans. As already noted, this first published policy does not seek to set population targets. The planning assumptions in the current Bridging Island Plan are set out above. The next Island Plan will take effect from 2025 and will be fully aligned to the Common Population Policy of the Council of Ministers *at that time* in line with the actions set out above and Strategic Proposal 1 of the Bridging Island Plan.

3.3 Setting a net zero target

In line with the commitment given in part (g) of P.120/2020¹², Ministers have given thorough consideration to the impact of a net zero inward migration policy.

With the underlying aim of the Common Population Policy *“to progressively reduce Jersey’s reliance on net inward migration within the currently agreed common strategic policy,”* it is very clear that the intention of Ministers is to reduce inward migration. However, as set out in the report, in the absence of up-to-date and detailed data on migration issues and evidence of the relative efficacy of different actions to be taken to reduce net inward migration, it is not realistic to set a timetable for the speed of reduction in migration levels, nor to predict any underlying ongoing requirement for net migration at this time.

However, assuming successful adoption of planned IT systems and subsequent collection and analysis of data, the government should be in a position to forecast the date on which the Island will be able to reach a stable population position, towards the end of the next electoral cycle.

¹¹ that any such common policy on Population informs and underpins the planning assumptions in future Island Plans, and that any population targets in the Population Policy are matched in the Island Plan;

¹² the Population Policy should demonstrate reasonable and thorough consideration has been given to a net-zero inward migration policy and provide a clear rationale (with supporting data) for why such a policy has not been proposed, should that be the case;

Progress towards achieving this target date, will be reviewed by each subsequent Council of Ministers.

For the same reason that this first policy does not include any numeric targets or overall population levels, it is also premature to comment on the implications of a net zero policy. Given the immaturity of data systems today, it would not be possible to assess adherence to a net zero policy, if this were to be introduced. It would therefore be irresponsible to pursue such a policy in the short term in the absence of relevant data as the likely consequences could not be predicted. As such, Ministers do not support the introduction of a net zero inward migration policy at this time. This will, however, be kept under review.

4. Data

To maintain and operate a meaningful population policy, high quality data needs to be available, tracking current activity and making forecasts of future activity and needs.

This first report will be published in advance of important data updates. It draws heavily on the detailed work of the Migration Policy Development Board, which was established in 2019 to develop policy proposals for more responsive controls over who can come to live, work and access public services in Jersey. The Board undertook research across many separate areas and published their final report in January 2020¹³. In June 2020 Statistics Jersey issued an updated population estimate, to the end of 2019, and this report reflects that data where possible (see Appendix A: Jersey Resident Population 2019 Estimate).

The outcome of the Census undertaken in 2021 will be published in 2022. This will give a very detailed picture of the population as at March 2021 and will provide valuable analysis to support further policy development. However, the Census is a “snapshot” in time and cannot be used to help monitor the success of population-related policies from year to year. Other data sources must be developed to provide this ongoing reporting, possibly including an electronic census.

The work currently underway to implement improved migration controls will also start to yield much better data from 2022 onwards. A new IT system is under development and once operational, will allow for detailed analysis of migrant workers and the businesses and sectors in which they are employed. This will include detailed monthly reports on current activity as well as the ability to provide longitudinal analysis, tracking individual workers and businesses over time. This IT system will have links to the new Revenue Jersey Combined Employer Return, which will be launched at the beginning of 2022. This will provide monthly updates of manpower data for the first time.

At the same time, plans are being developed to create a data linkage infrastructure between administrative data sets held by departments. This will provide a base to provide annual estimates of the population, track the journeys of migrants through the CHWL system and produce income distribution statistics based on tax and benefits data. Other data driven projects will also add to the depth of knowledge across Government activity. This will contribute, over time, to an improved picture of Jersey’s population and its characteristics. The production of a rolling e-census would significantly improve the available evidence on which to base future decisions.

In the absence of these new data sources, it is inevitable that this first policy report is limited in scope.

¹³ [R.20-2020.pdf \(gov.je\)](#)

Establishing a full range of timely and detailed data sources is a key aim of Ministers during 2022.

Much detailed work will be needed to define appropriate data sources, and identify the type of analysis required appropriate to each type of data. The oversight and governance of these activities will also need to be considered carefully to ensure that robust and accurate information is collated.

The Council of Ministers appointed in summer 2022 will then be able to start to draw on these valuable updated and expanded data sources, which will allow for more detailed analysis and specific actions to be included in future population policy updates.

4.1 Population Growth

Population growth is not a recent phenomenon. Colin Platt, in 2009¹⁴ suggests that even by the end of the thirteenth century some commentators had observed that Jersey was becoming ‘*dangerously overcrowded*’.

More recently, there has been a continuous growth in Jersey’s population since 1951, with the resident population of Jersey at year-end 2019 being estimated as 107,800¹⁵.

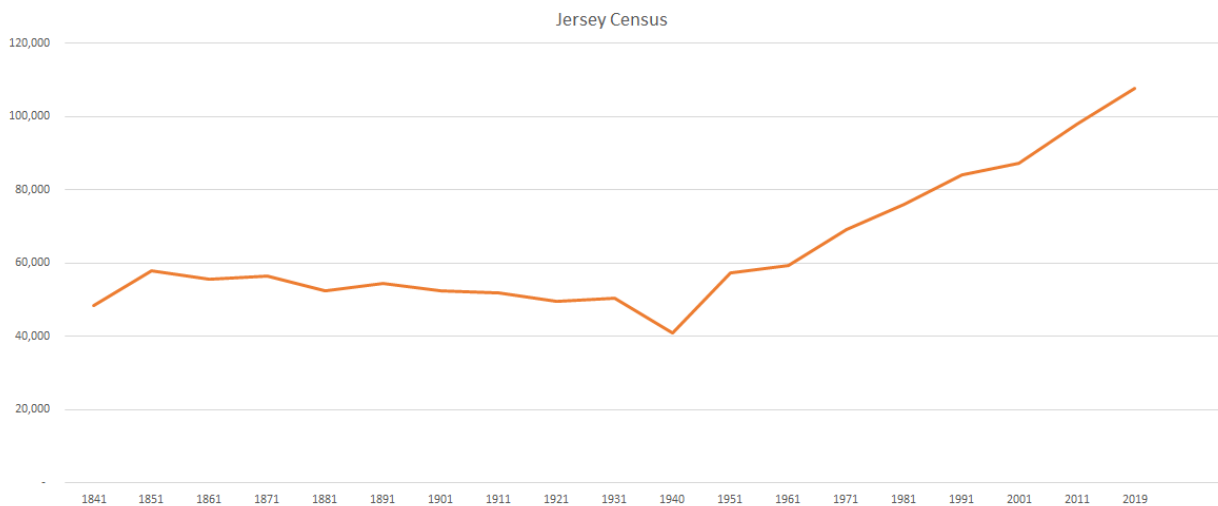


Figure 3: Census data 1841-2011 (Jersey’s resident population at the end of 2019 estimated as 107,800. During Occupation years census was in 1940 not 1941. 1841-1951 UK census data, (except 1940 Dept. of Labour, Jersey), after 1951 Statistics Jersey and antecedents .Internal, 2021.)

In recent decades this population growth has been predominantly driven by the net inward migration rate, with natural population growth (the number of births relative to the number of deaths) accounting for only a small proportion of the total population change in most years.

¹⁴ Platt, Colin (2009) A concise history of Jersey : Société Jérsiaise.

¹⁵ [Jersey Resident Population 2019 \(Statistics Jersey\)](#)

Calendar year	Natural growth	Net inward migration	Total annual change
2001	190	300	500
2002	90	300	400
2003	250	0	300
2004	220	300	500
2005	220	700	900
2006	190	1,100	1,300
2007	320	1,400	1,700
2008	300	1,100	1,400
2009	250	500	800
2010	270	700	900
2011	390	600	1,000
2012	360	500	800
2013 ⁵	300	700	1,000
2014 ⁵	310	700	1,000
2015	220	1,500	1,700
2016	200	1,300	1,500
2017	130	1,200	1,400
2018	100	1,100	1,200
2019	90	1,000	1,100

Net inward migration and total annual change numbers have been independently rounded to the nearest 100; natural growth numbers have been independently rounded to the nearest 10; numbers may not sum due to rounding.

Table 1: Change in Jersey's resident population, 2001 to 2019 (Statistics Jersey, 2019)

Over the 11-year period from year-end 2008 to year-end 2019, the population is estimated to have increased by 11,700, with four-fifths (80%) of the increase accounted for by net inward migration (9,300), although it should be noted that net annual inward migration has decreased from a peak of 1,500 in 2015 to 1,000 in 2019.

During 2019 the resident population was estimated to have increased by 1,100 persons, with net inward migration accounting for 1,000 of the annual increase, and natural change (births minus deaths) accounting for 100 of the estimated annual increase. An ageing population is typically associated with a reduction in natural growth as the proportion of people of child rearing ages reduces.

In June 2021, the total number of jobs in Jersey was 62,430 (on a par with the highest recorded level of 62,470 in June 2019) with 53,640 jobs in the private sector and 8,790 jobs in the public sector. These manpower statistics are designed to measure the number of jobs in the economy. As some workers have more than one job, the number of workers will be less than these figures. From 2022 onwards, the improved data collection with the new CHW and Combined Employer Return systems will help to track the number of individual workers on a regular basis.

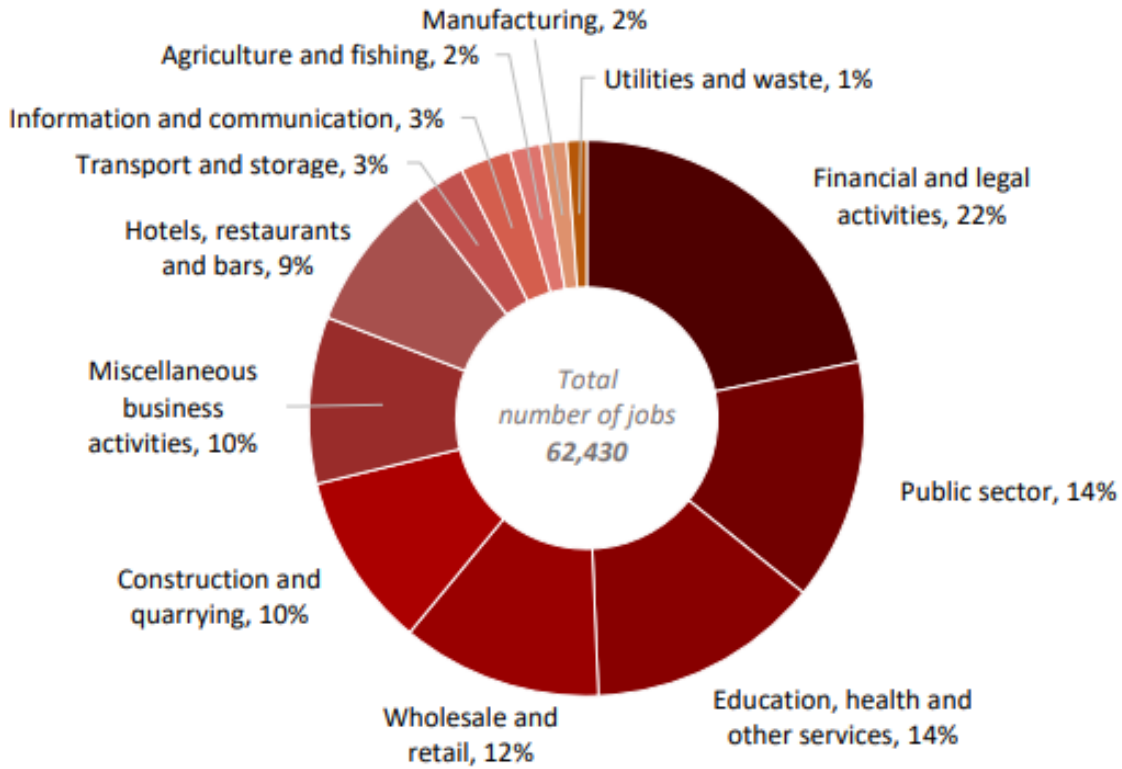


Figure 4: Percentage of total jobs by sector, June 2021 (Statistics Jersey)

See Appendix B: Jersey Labour Market - June 2021.

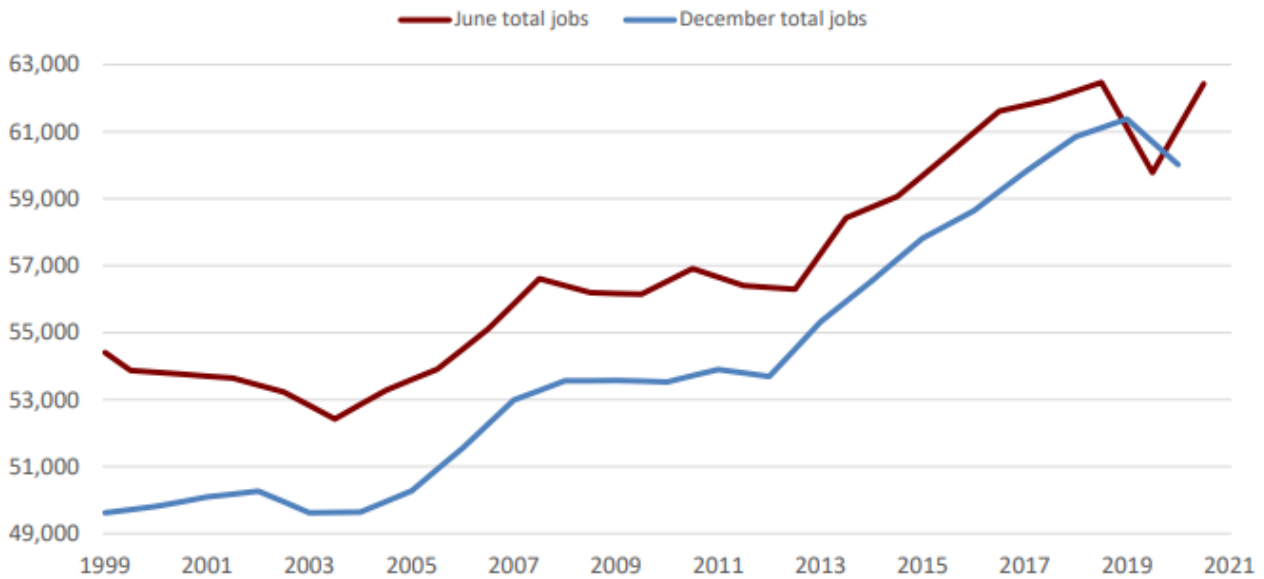


Figure 5: Total jobs in Jersey in June and December 1999 to 2021 (Statistics Jersey, 2021).

Whilst Statistics Jersey cannot predict the future population of Jersey, it can apply different rates of net inward migration to the current population to give a range of forecasts to indicate the possible impact upon the overall population level and the relative increase in the proportion of older Islanders which will affect the dependency ratio.

The dependency ratio is calculated by Statistics Jersey as the number of children aged under 16, plus the number of persons aged 65 years or over (i.e. 'dependent persons'), divided by the number of people aged 16 to 64 years inclusive¹⁶. For example, if there are 50,000 children and pensioners in the population and 70,000 working age adults, the dependency ratio is calculated as $50,000/70,000 = 71\%$.

The dependency ratio is a useful measure. Children under 16 require education services and adults aged 65 and above typically use more health services than younger adults as well as receiving state pensions. The cost of education and health services and pensions is predominantly borne by the working age population through taxes and contributions. As the dependency ratio increases, more pressure is placed on those of working age to support the costs of the services provided to the children and older people in the population.

Scenario A - Net Nil migration

Outline: in this scenario, the number of people arriving in Jersey to live is set to equal the number moving away, so that overall, there is net nil migration. However, because the age profile of outward migrants is different to the age profile of inward migrants (the recent trend is that inward migrants are younger than outward migrants), and birth and death rates vary by age, the outcome of net nil migration is slightly different to that of no inward or outward migration.

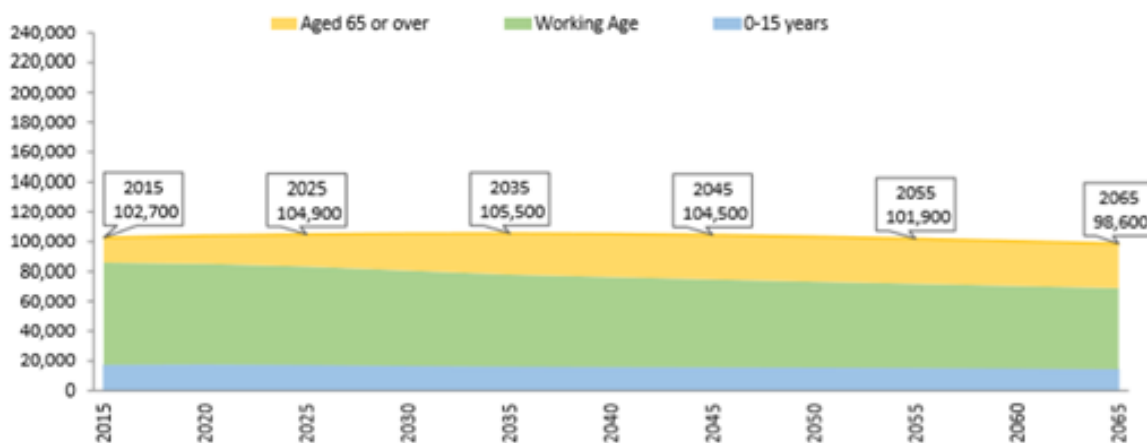


Figure 6: Resident population projection showing age groups based on nil net migration 2015 – 2065 (Statistics Jersey, 2016)

¹⁶ To assist in interpretation of the trends resulting from the migration scenarios, the increase in pensionable age to 67 by 2031 has not been taken account of in the projections produced by Statistics Jersey. This change in pensionable age would reduce the effective dependency ratio seen from 2031 onwards by approximately 6 percentage points.

In the net nil migration scenario, overall population is forecast to decline slowly over the projection period.

However, the proportion of those of working age, relative to those who are either still in education or no longer working, is forecast to decline to a greater degree, this reflects a higher dependency ratio, or a greater proportion of non-working people to be supported by those who are working.

Between 2025 and 2065, the number of people aged 65 and above is forecast to increase by more than one-third, while the number of working age people reduces by 18%. Without major changes to the economy or reductions in government benefits and services, this would require significant higher tax and /or social security contributions for workers and businesses.

	2025	2035	2065
65+ yr olds at year end	21,600	27,600	29,800
16 – 64 yr olds at year end	66,100	61,700	54,400
0 – 15 yr olds at year end	17,200	16,200	14,400
Total population at year end	104,900	105,500	98,600
<i>Dependency Ratio</i>	<i>59%</i>	<i>71%</i>	<i>81%</i>
Number of births during year	970	930	820
Number of deaths during year	830	960	1,150

Table 2: Short, medium and long term summary demographics of net nil migration 2015 – 2065 (Statistics Jersey, 2016)

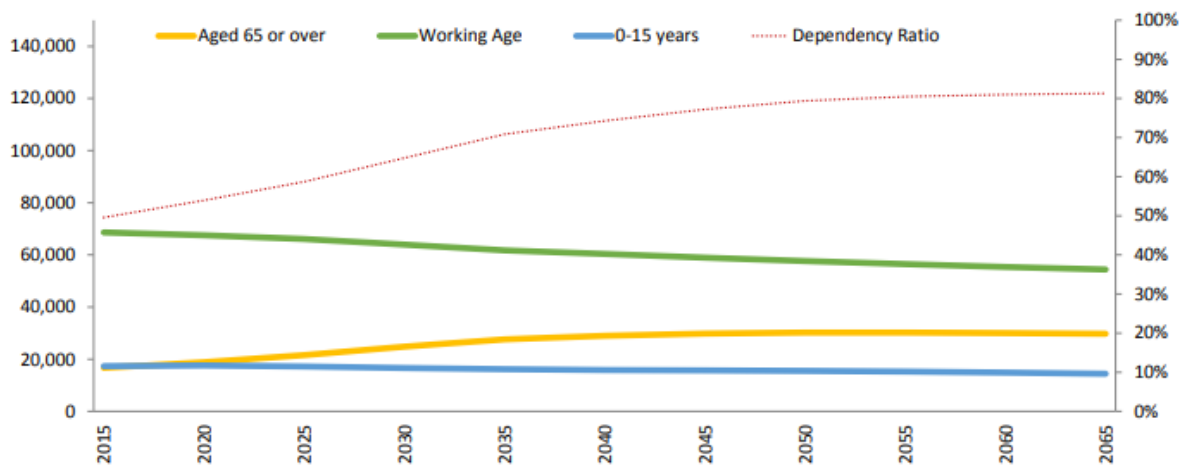


Figure 7: Trend in age-group subpopulations and dependency ratio for net nil migration 2015-2065 (Statistics Jersey, 2016)

Scenario B - +700 migration

Outline: in this scenario, an additional 700 people move to the Island over and above the number that leave the Island, each year from 2016 onwards. As with the nil net scenario, the fastest growth is in adults aged over 65, but in this scenario, the increase in the dependency ratio is tempered by some increase in the 16-64 age group.

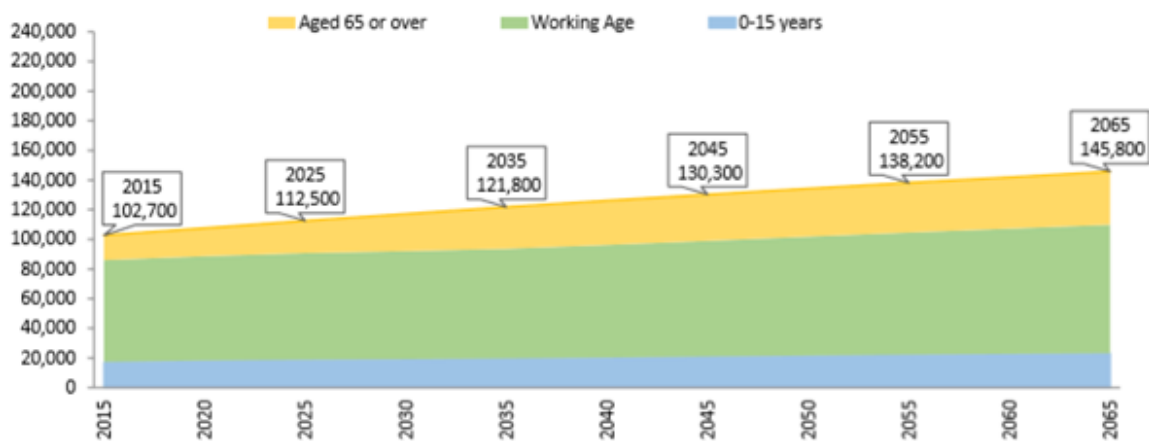


Figure 8: Resident population projection showing age groups based on +700 migration 2015 – 2065 (Statistics Jersey, 2016)

In the +700 migration scenario, overall population increases over the projection period. The number of people in each age group is forecast to increase.

While the number of working age adults increases in this scenario, the percentage increase in those aged 65 and above is much higher and the dependency ratio is still forecast to increase.

The number of people aged 65 and above is forecast to increase by 65%, while the number of working age people increases by 20%. This increase in dependency ratio also puts pressure on the funding of public services, although to a lesser extent than the net nil scenario.

	2025	2035	2065
65+ yr olds at year end	21,700	28,100	35,800
16 – 64 yr olds at year end	71,900	74,000	86,700
0 – 15 yr olds at year end	18,900	19,700	23,200
Total population at year end	112,500	121,800	145,800
Dependency Ratio	56%	65%	68%
Number of births during year	1,090	1,160	1,370
Number of deaths during year	840	980	1,280

Table 3: Short, medium and long term summary demographics of +700 migration 2015 – 2065 (Statistics Jersey, 2016)

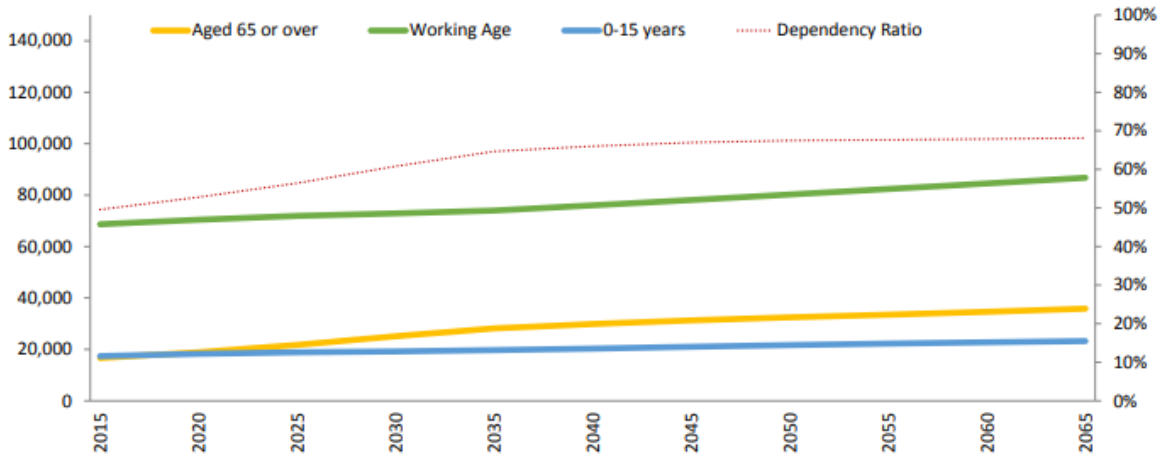


Figure 9: Trend in age-group subpopulations, and dependency ratio for +700 migration 2015-2065 (Statistics Jersey, 2016)

These forecasts from Statistics Jersey are based on the current rules for inward migration (per the Control of Housing and Work (Jersey) Law 2012) and do not take account of the proposed changes that have been agreed by the Assembly as part of P.137/2020.

See the full report at Appendix C: Jersey Population Projections 2016 Release.

4.2 Ageing Population

The natural growth in a population is determined by the number of births over the number of deaths. Many countries are experiencing a reduction in natural growth, as an ageing population leads to falling fertility rates. This is a global phenomenon and leads to older populations - i.e., people in older age groups representing a higher share of total population. Figure 10 shows the historical share of total population of different age groups in Jersey, with a clear relative growth of people over age 65 and a decline of people under the age of 15 over time.

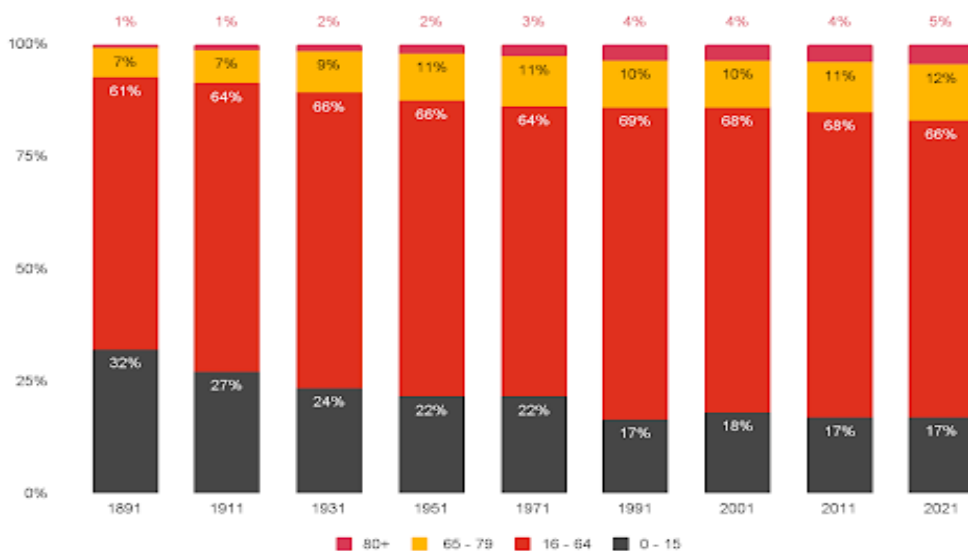


Figure 10: percentage of population by age group, 1891 to 2021 (source: Government of Jersey)

This change in demographic mix brings opportunities as well as challenges. Jersey can learn from other societies which have already experienced and adapted to the ageing of their population. A detailed report from PwC (see below) commissioned for this project, examines the impact and opportunities created by an ageing population.

The over 65 age group represents the fastest growing share of the resident population over the past decades. As older people become more numerous, the size of the older population (e.g. people over 65) increases relative to those of working age. There is a correlation between older age and gender, with a greater number of women living beyond the 65-69 years old age bracket.

The future population estimates produced by Statistics Jersey provide age breakdowns. These show that the rate of inward migration has little impact on the ageing of the resident population in the short-medium term. The number of people aged over 65 will increase steadily over the next 30 years, whatever migration controls are in place. With no net inward migration this would lead to a reduction in the number of working age people, as more older people leave the workforce compared to the number of younger people joining the workforce.

	Dependency ratio	Working age population	Total population size
Year-end 2015 population characteristics	50%	68,600	102,700

• The table below outlines the projected change over the next two decades under each scenario:

Population characteristics year-end 2035 under scenario	Dependency ratio	Change in working age population compared to 2015	Total population size in 2035	Change in total population size, relative to 2015 (%)
No inward or outward migration	74%	-9,000	104,100	1%
Net nil migration	71%	-6,900	105,500	3%
Net migration +325 people annually	68%	-1,200	113,100	10%
Net migration +700 people annually	65%	5,400	121,800	19%
Net migration +1,000 people annually	63%	10,600	128,800	25%
Net migration +1,500 people annually	60%	19,300	140,400	37%
Net migration +2,000 people annually	57%	28,100	152,000	48%

Figure 11: Dependency ratio projections across various migration scenarios in 2035 (Statistics Jersey)

From these estimates, it is suggested that a net inward migration rate of approximately +325 a year will maintain the working age population at around today's level, but the dependency ratio will increase due to the increase in the number of people over working age. Inward migration below this would lead to a smaller working age population with the dependency ratio rising faster; net migration above +325 would lead to a larger working age population - the dependency ratio would still increase but at a lower rate.

The dependency ratio would also be affected if a significant proportion of the Jersey émigré population, i.e. those who maintain a status that entitles them to live and work in Jersey (estimated in 2010 to be around 20,000 individuals¹⁷), decided to return to the Island upon retirement.

In June 2020, the Government of Jersey appointed PwC as their strategic partner in delivering the Future Economy Programme. As part of this programme and to support the development of this

¹⁷ Jersey's Population – a History (Mark Boleat, 2021)

first population policy a report on the 'Impacts of an ageing population on Jersey's economy'¹⁸ was commissioned to study the macroeconomic and sectoral effects in Jersey of an ageing population.

The report examines demographic trends within Jersey and analyses the impact of ageing on the labour force. It also considers supply and demand issues across different sectors as a result of an ageing population as well as the wider impact of ageing on the economy as a whole. A range of policy directions are identified. These emphasise the importance of identifying appropriate pensions and employment policies to support older workers in the labour market and the need to provide for ongoing skills training and lifelong learning as well as promoting healthy and inclusive ageing.

4.3 Housing

Overall Housing demand

The Objective Assessment of Housing Need (OAHN)¹⁹, published in January 2019, provides an assessment of housing need over the next ten years based on Census data and population estimates. The Assessment makes it clear that more housing will be required in the coming years, regardless of migration, due to population trends such as increasing life expectancy and reductions in the average size of households. The report estimates the number of additional units that would be required under four population growth scenarios (net nil; +325; +700; and +1000) for the period 2021-2030.

In addition to the housing requirement set out in the OAHN report, it is recognised that population growth from 2011-2020 has been significantly higher than the anticipated additional 325 people per year assumed in the previous Island Plan, averaging around 1,000 people a year. Statistics Jersey has estimated that, because of this, a net shortfall of 1,800 homes has arisen over the ten-year plan period (2011-2020). Some of the demand associated with this shortfall may have been met by existing under-capacity in the market. However, it is reasonable to assume that the remaining unsatisfied demand is contributing to the housing pressures experienced in Jersey and creating additional demand that should be reflected in the housing requirement.

Modelling undertaken using the same methodology as the OAHN suggests that the projected near-term annual population increase of +800 per year adopted for the Bridging Island Plan would generate a need for an additional 6,100 homes over a ten-year plan period from 2021-2030. When this is considered together with the net shortfall of 1,800 homes from the last plan period, a net target of at least 7,900 homes is required up to 2030.

Based on the above, the housing development target in the draft Island Plan over a five-year planning period (from 2021 to the end of 2025) arising from changes in ageing and dwelling patterns; from increases in population over the plan period; and from the net shortfall of the last Island Plan period, was initially set at 3,750 homes and since revised to 4,000 following a more recent update to housing completions data. This recognises a continuity of supply in the transition between the former plan; the current draft Island Plan; and the next longer-term Island Plan and equates to a minimum rate of supply of 750 homes per year.

¹⁸ [Impacts of an ageing population on Jersey's economy – PWC, November 2021](#)

¹⁹ [Objective Assessment of Housing Need Report.pdf \(gov.je\)](#)

The OAHN report assesses the scale of housing need in all tenures (non-qualified; owner occupier; qualified rent; social rent) and provides a longer-term evidence source of housing demand and size requirements, principally based upon population modelling. The report concludes that there is significant demand for larger 3- and 4-bedroom homes for private purchase across all population growth scenarios - with a demand for 69% of homes for purchase (in a +700 population growth scenario) to be 3- and 4-bedroom homes. Within the social rented tenure, however, the most significant need is for 1- and 2-bed homes – with 92% of the need for social rented homes to be smaller units.

In addition to this, there is a specific requirement to provide key worker accommodation to support essential public services. The OAHN recommends provision of 25 key worker homes per year to support this objective, which should be considered in addition to overall housing demand driven by population change.

Ageing population impact on housing

Linked to changes in the population age profile, as well as other social and cultural changes, Jersey's households are getting smaller. Over the last forty years, local household size has decreased from 2.8 persons per household in 1971, to 2.31 persons per household in 2011. The implications of this population change, relative to use of the existing housing stock, means that there is an increasing 'mismatch' between the number of people living in a household and the size of the home occupied by them.

The 2011 Jersey Census recorded that around a quarter (26%) of households were under-occupying their accommodation, that is they had at least two bedrooms more than they needed as measured by the Bedroom Standard. The rate of under-occupation was highest for owner-occupied households (42%), with levels of under-occupation concentrated among older people's households. The 2011 Census also confirmed that people over 65 make up approximately 17% of Jersey's population but account for about a third of all homeowners and live in a quarter of the homes in the Island.

The 2021 Census will provide valuable information on how property use has changed over the last ten years and the current level of under occupation in the Island. With better data, more accurate predictions can be made regarding the number and type of homes that will be needed in future, optimising the use of available housing sites.

4.4 Infrastructure

To inform the development of the draft Bridging Island Plan, a comprehensive Infrastructure Capacity Study²⁰ has been undertaken. This study considers existing infrastructure provision, its current capacity and expected lifespan; identifies planned/known enhancement of the capacity of existing or new infrastructure, and considers the impacts of relevant external drivers and mega trends, including technological developments and demand management. As is made clear in the Study, there is no collective 'tipping point' at which our existing infrastructure can no longer withstand population growth, with individual situations being influenced by the demographic profile of our population, how future demand is managed (including policy decisions), how we might invest in the infrastructure and what technology might become available.

The Infrastructure Capacity Study is being used as a basis for future scenario and foresight planning to inform an Infrastructure roadmap for Jersey. The roadmap will inform short and long-term strategic policymaking and help to understand the costs and consequences for the

²⁰ [Infrastructure Capacity Study \(gov.je\)](http://gov.je)

environment, economy and wider society of key future infrastructure choices. Work is presently underway to develop a framework for the Infrastructure roadmap, which will include consideration of the most appropriate horizon for long-term planning, which may be 50 years to 2070 and may be able to provide a view in decade increments.

Part(c) of P.120/20 requests data in respect of the infrastructural, educational, health-related, environmental and social requirements of the proposed population size across the period to 2070, and a prediction of the population size in 10 year intervals until 2070. As noted above, this first Common Policy does not attempt to set numeric targets for future population or population growth. It is not possible at this time to provide any meaningful forecasts of the needs of Jersey's resident population in 2070, as there are significant variables which will influence requirements on this longer-term horizon.

The current and emerging context creates and reveals opportunities, vulnerabilities and uncertainties to Jersey, including from Brexit, international regulatory change, demographic change, automation and the need for climate transition. The future operating environment requires Jersey to be agile in the face of risk and emerging opportunities, and to make investments into infrastructures that can ensure our sustainable wellbeing and prosperity, with an ability to make transitions where necessary.

It is accepted that to achieve this, better planning for long-term requirements is required. The development of the infrastructure roadmap is a commitment of the draft Bridging Island Plan and it is recognised that this will be developed alongside future iterations of the annual Common Population Policy and other associated long-term planning assumptions.

Part 9(d) of P.120/2020 requests sustainability data of all required infrastructure projects (in 10 year intervals) arising from the forecast rate of population growth. The near-term 10 year interval of sustainability data has been published as part of the draft Bridging Island Plan evidence base, including:

- Infrastructure Capacity Study 2020
- Minerals, Waste and Water Study 2021
- Employment Study 2021
- St Helier Public Realm and Movement Strategy 2021
- Objective Assessment of Housing Need 2018
- Draft Bridging Island Plan Preferred Strategy report 2020

The draft Bridging Island Plan also recognises that further work is required to better understand and respond to future infrastructure requirements, including:

- Biodiversity net gain and green infrastructure and network strategy
- Design for homes and future affordable housing provision
- Review of the education estate
- Active travel network, public realm works programme and sustainable transport zones
- Water resource management strategy

Other key areas of strategy include the development of the Sustainable Transport Policies associated rapid plans, the Carbon Neutral Roadmap and implementation of the Public Estate Strategy. In addition, climate change adaptation requirements will require the development of plans, including coastal defences and surface water drainage. Collectively, this work is essential to understand our long-term infrastructure needs.

As with the response to part (c) of P.120/2020, the development of an infrastructure roadmap will be key to Ministers' understanding of long-term infrastructure requirements, having regard to all the work that already exists, is under development or has been highlighted as a future requirement. It is important that the development of the infrastructure roadmap is able to determine the most appropriate horizon and intervals for planning.

Current information and relevant forecasts are included in Appendix E: Infrastructure Capacity Study 2020.

4.5 Health

The largest single broad area of government expenditure in Jersey is the provision of health. The Health and Community Services Department accounts for around £220 million of expenditure a year, or approximately £2,100 per capita. Average costs per person do however vary quite substantially by age group, with older members of the population typically requiring more care than the younger groups.

Recent estimates of per capita consumption by broad age group have been obtained using data from the Patient Level Information and Costing System (PLICS) for 2017 and then inflation adjusted to 2018.

The broad groups are shown below:

Age group	Cost per capita (2017 values)	Cost per capita (Inflation adjusted to 2018)
Child (0-17)	£1,462	£1,519
Working age adult (18-65)	£1,649	£1,713
Over 65	£3,578	£3,718
Over 85	£4,521	£4,697

It is important to note that the above figures represent broad population averages and will not be reflective of the costs associated with any particular household. As noted above, under all migration scenarios, the number and proportion of people aged over 65 increases rapidly in coming decades.

This will lead to an increase in health costs, all other factors being equal.

4.6 Benefit expenditure

A range of benefits are paid from ring-fenced funds. By law, each of these funds is subject to regular actuarial reviews which examine the health of the fund over a future period. The Social Security Fund pays out old age pensions and a range of working age benefits. The latest review provides forecasts for fund expenditure for the next 60 years. The Health Insurance Fund provides benefits and supports contracts to subsidise specific aspects of primary care services. The Long-Term Care Fund provides benefits to adults who require long-term care. The latest reviews of these two funds provide forecast for fund expenditure for the next 25 years. Full details are provided in the following published reports:

[Long Term Care Fund](#) (R.136/2018)

[Social Security Fund](#) (R.31/2019)
[Health Insurance Fund](#) (R.32/2019)

Part(f) of P.120/2020 also requests forward projections until 2070 of income support costs. It is not possible to provide meaningful forward projections for this tax funded benefit as future costs will be significantly dependant on the fiscal and economic policies adopted by future Assemblies.

5. Consultation

To support the development of this first common population policy, views have been sought from the general public and through focus groups and individual and stakeholder meetings. Outcomes from these surveys and meetings are set out below.

Between May and October 2021, consultation took place with a range of stakeholders. The requirements of part (f) of P.120/2020 were addressed in a series of demographically representative focus groups, but views were also sought from industry representative bodies, individual businesses (of varying sizes and industry sectors), students and recent graduates and the general public.

5.1 Island Identity Consultation and Report

The Island Identity project, conducted by the Island Identity Policy Development Board²¹, has a number of synergies with population policy and accordingly some of its findings are included in this policy. Jersey has a thriving economy, and must continue to attract world class businesses, in all sectors of the economy.

Global events have truly shifted the way in which the world works. Major events such as the pandemic, Brexit and the consequential changing relationship between the UK, Europe and the rest of the world will continue to have an impact on citizens, but also on how Jersey is perceived by those outside of the Island. The shifting dynamic amongst the population due to political, economic and social change, rapid technological advances and the impact of climate change on the world will likely affect how the population lives, works and carries out their day to day lives.

Therefore, the project sought to consider how these changes might impact o the Island's identity. The consultation identified a number of specific goals, including:

- nurturing a stronger sense of citizenship and engagement in public life; and
- developing Jersey's international personality.

The Board looked at key areas of significance for the Island, including the economy, environment, education and how Jersey places itself on the international stage. Jersey has always innovated and in recent years the Island's superior connectivity and entrepreneur-friendly ecosystem were highlighted as contributing factors to a rapidly-growing digital sector.

²¹ [Island Identity Policy Development Board \(gov.je\)](#)

The Board observed that Jersey punches above its weight in the international financial sector, but felt more could be done to ensure the inclusivity of migrant communities and their engagement in Island life.

Finally, the Island Identity Policy Development Board agreed that Jersey's people are its greatest asset, and our education system should ensure everyone is reaching their full potential. Developing a skilled workforce will improve social mobility and cohesion, improve economic performance, and provide the majority of the human capital required to administer the Island. Accordingly, opportunities identified by the Board included the commissioning a rapid study of the Jersey University concept (in its widest sense, including a university campus in the Island) and progressing a talent programme to develop people, in order that 'home-grown' talent is encouraged for top posts.

5.2 Focus Groups

A series of focus groups was commissioned in order to gauge Islanders' views on a sustainable population size for Jersey over a 50-year period.

The specific objectives of the focus groups were to explore:

- a) Islanders' views on Jersey's future population policy;
- b) tolerance of inward migration to support the economy and the response to perceived trade-offs between the economy, environment and community;
- c) the extent to which Islanders would be prepared to work longer or pay more tax, if this resulted in a reduction in inward migration and slower population growth;
- d) the reasons why young Islanders do, or do not return to Jersey;
- e) the hypothesis that population policy is no longer about setting a number;
- f) what action Islanders perceive the government should be taking in respect of population; and
- g) what a successful population policy could look like, according to Islanders' perceptions.

A total of 6 focus groups, comprising 38 participants, took place in July 2021.

Participants were drawn from a broad mix of socio-demographic backgrounds in order to achieve a representative sample of the Island's population by age, gender, ethnicity (including whether Jersey born or not) family situation, annual household income, plus attitudes to the environment and community.²²

Of the 6 groups, 5 comprised representative samples across all demographic groups, with the final group consisting of a representative sample but drawn from people aged 18-30.

²² See independent facilitator's report for full details (Appendix F)

The main themes to emerge from the focus group consultation were the following:

- Environmental protection: participants highly valued Jersey’s natural environment and quality of life. Many were concerned about green space being lost for housing, should the population continue to grow;
- Educational opportunities: the need for investment in career opportunities was recognised in the groups, to help reduce our dependency on importing workers with specific skills. Participants favoured increasing work experience opportunities and encouraging employers to train staff and hire locally wherever possible;
- Sustainable transport: traffic congestion was widely perceived to be a consequence of population growth and the focus groups supported the introduction of sustainable transport initiatives to limit the number of vehicles on Jersey’s roads;
- Housing affordability / housing availability: participants felt that population growth, in the absence of a population policy, had resulted in a lack of supply and caused house prices to rise. Concerns were raised about the number of young people leaving the Island or not returning following higher education. The provision of schemes to assist first-time buyers was supported; and
- Success criteria: the majority of participants perceived that a successful population policy need not specify a number for the overall population, but should take the form of a points-based or visa system.

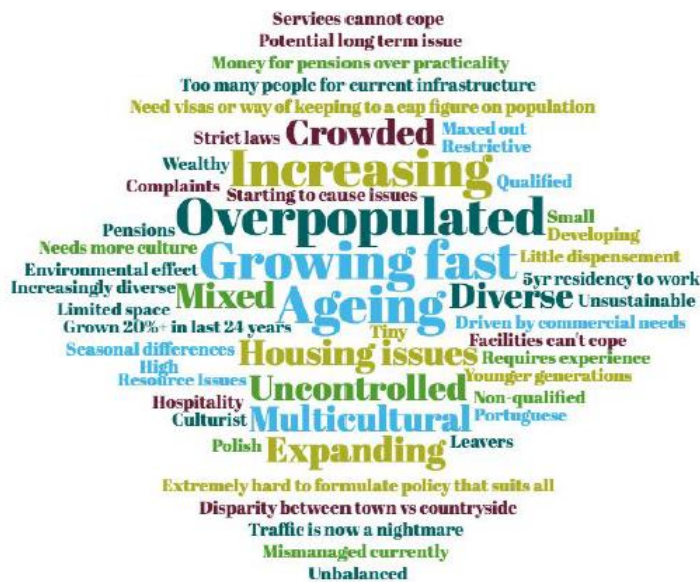


Figure 12: Focus Group participants’ response when asked to describe what they think about Jersey’s population

Overall, participants perceived Jersey’s current population size as being ‘too big’ and considered the Island to be overcrowded. The majority highlighted the small size of Jersey and how its facilities and infrastructure could become unable to cope with the growing population.

However, many spontaneously recalled the economic success immigration has brought Jersey, particularly in sectors such as hospitality, agriculture and finance.

Many liked the cultural diversity of the Island with all members of the younger (18-30) group wanting the Island to be more multicultural and inclusive. Participants felt that young Islanders are encouraged to either go to university or pursue careers in finance, with the perception of careers in hospitality and agriculture as only providing lower-paid work. This issue was emphasised by the 18-30 year-old group, many of whom had only recently completed full time education. This group also felt that Jersey could have a stronger identity and be more welcoming to incomers, which would also make young Islanders more likely to return to Jersey in the longer term.

The majority of participants felt that a future population policy did not need to take the form of a cap or maximum number, but it did need to be a fair system. There was a strong awareness throughout the groups that a successful population policy would need to support the economy and provide opportunities for young people.

The economy, environment and community were all valued and the need to balance these three tensions was recognised, without any clear priority being given to one element over the others. When asked what personal changes they would be prepared to make, if this contributed to a reduced reliance on inward migration, most stated that they would be prepared to pay more tax, although they wanted to know how this money would be spent. Many would be willing to continue working past pensionable age but most were against a reduction in public services.

See Appendix F for output from the independent facilitator.

5.3 Public survey results

Responses to a public survey were sought between 29th July and 13th September 2021. The survey questions and the overall responses can be found in Appendix G. A total of 1,728 people completed the questionnaire and over 5,000 comments were received in response to a series of open-ended questions.

This was a self-selecting survey. The demographic analysis of respondents shows a good mix of age, gender, place of birth and current residential qualifications but the survey does not attempt to be statistically representative of the population.²³ Results are provided directly in line with the responses received and have not been weighted.

In addition to demographic questions, respondents were asked about their satisfaction with life in Jersey, how much they felt part of the local community, whether they had any plans to leave the Island in the next 5 years and if so, why.

Views were also sought on the current size of the population, the impact of changes brought about by inward migration and what actions respondents would personally be prepared to take to help reduce the Island's reliance on inward migration.

Finally, the survey sought opinions on what issues the Government should prioritise in the development of a population policy, how the success of a policy could be measured and Islanders' vision for Jersey in 50 years' time.

The results of the public survey can be summarised as follows:

²³ Demographic details of survey respondents are provided in Appendix G

- a) of those not born in Jersey, just over half came to the Island for work reasons;
- b) the majority (70%) of non-Jersey born respondents said that they considered Jersey as their permanent home and had no plans to leave; for Jersey born respondents, this figure was a little lower at 65%.
- c) 28% of respondents thought they would leave Jersey in the next 5 years – the high cost of housing was cited as the main reason for leaving by nearly half of that group (43%)
- d) 69% of respondents were either 'satisfied' or 'very satisfied' with their life in Jersey and 57% felt part of the Jersey community. People who were not born in Jersey provided more positive responses to both questions (75%, 66%) compared to those born in Jersey (62%, 47%); respondents aged under 35 were less positive towards both statements compared to older respondents.
- e) just over 75% of respondents thought that the Government should set a target figure for the population. At the same time, 58% also agreed that setting a figure was less important than quality of life for those who live here;
- f) when asked to consider the impacts of a changing population over 79% thought that there was too much traffic on the roads and 88% thought that it was currently too hard for local families to find a home to purchase;
- g) in some areas, there were noticeable differences of opinion between age groups and those born (or not born) in Jersey with older, Jersey-born respondents more likely to view the Island as overcrowded:

In response to the statement "there are too many people in Jersey – the Island is already overcrowded", 87% of people born in Jersey and aged over 55 expressed agreement. By contrast 34% of people who were not born in Jersey and aged under 35 agreed with this statement. Jersey born people in each age group agreed with the statement much more strongly than non-Jersey born people of the same age group. Agreement with the statement also increased with older age groups.

In response to the statement "people from outside Jersey bring new ideas and innovation". 80% of non-Jersey born people aged under 35 expressed support and just 30% of Jersey born people aged over 55. Non-Jersey born people in each age group agreed with the statement more strongly than Jersey born people in the same age group. Agreement also decreased with older age groups. Very similar responses were made to the statement "we need to import skilled workers if Jersey is to remain open for business".

There was general support for the statement "Businesses need staff to expand, to maintain our economy and support the cost of running local services."

- h) Two thirds of people agreed that Jersey had welcomed migrants for hundreds of years and they were part of local culture;
- i) less than 30% of respondents thought that Jersey's population was 'about right' or 'too low' with 61% believing the current level was too high. A significant majority of those aged

over 55 and born in Jersey considered the population as too high (81%) whilst at the opposite end of the spectrum only 28% of non-Jersey born under-35s considered the population to be too high;

j) respondents were asked to select between 3 and 5 areas for the Government to prioritise when developing a population policy. The most popular answers to the question ‘as an Island, we should....’ were the following:

- invest in lifelong learning so that local workers can be retrained to adapt to new jobs and technology (76%);
- improve educational outcomes for all children so that local young people are well trained to work in the local economy (73%);
- encourage local students to return to the Island on completion of higher education (64%);
- live within our means, significantly reduce migration and move to an economy that is not based on continual growth (53%); and
- increase the supply of homes so that everyone living in Jersey has good quality accommodation (45%)

The two most popular statements were chosen by around three-quarters of all respondents. This provides very strong support for action in these areas and education and skills are key themes that are developed in this first common population policy.

k) the survey also sought views on what respondents would do individually to help reduce the need for further inward migration. Options and level of agreement were:

<u>Suggested options:</u>	<u>Agreed / strongly agreed</u>
• I would carry on working past normal retirement age	29%
• I would pay more taxes or user charges	23%
• I would accept a reduction in the quality or range of public services that I use	23%
• I would accept less choice and or higher costs in shops and local businesses	20%

Similar levels of agreement were expressed by different age groups and by those born in Jersey and not born in Jersey. While a significant number of people expressed a clear opinion that the population Jersey was too high today, this group was only a little more likely to agree with the options for personal action than the group of respondents who did not consider the population to be too high. For example, 18% of the group that considered the population to be too high also disagreed or strongly disagreed with all 4 of the personal actions suggested.

By contrast the focus groups, which allowed for a more detailed discussion of the issues, provided a more positive response to the need to take personal action.

- l) choosing to take no action and encouraging people to come to the Island to work was an agreeable strategy to over half of younger non-Jersey born respondents, but only 8% of Jersey born over 55's. Overall, 53% of respondents either disagreed or strongly disagreed with this option.

The need for population issues to be widely discussed with better data and understanding of the problem and the possible solutions is a key theme developed in this first common population policy.

- m) when asked how future governments should measure whether a population policy had been successful, respondents identified various criteria, with the most popular and consistent topics shown below:

- increase in amount of affordable housing / housing choices and quality of available housing;
- overall quality of life;
- less demand on services/facilities, measured by variables such as hospital waiting times, space in schools and road traffic;
- a reduction (or zero increase) in population;
- setting a migration target / population cap and ensuring this is met;
- measurement of environmental impacts such as green space, pollution and road traffic;
- economic indicators;
- surveying the local population;
- employment rates; and
- setting KPIs and reporting on them regularly.

- n) considering participants' vision for Jersey (for themselves, their children and young people growing up in the Island today) over a 50-year time horizon, the consistent and most often-repeated themes in respondents' answers were:

- affordable housing / housing options;
- for Jersey to be a sustainable and eco-friendly Island;
- affordable cost of living / making living in Jersey accessible to all, not just the wealthy;
- good educational opportunities, including skills-based training and vocational courses;
- diversified job market;
- a multi-cultural island where equality is valued;
- less development;
- low crime and a safe place to live;
- retaining Island identity and heritage; and
- being a place where locals want to stay and are given opportunities;

o) finally, respondents were invited to make any additional comments they wished to regarding Jersey's population or actions the Government might consider. Over 700 people commented and as far as they had not already appeared elsewhere in the results, the main themes are detailed in Appendix G. Suggestions included:

- encouraging home-owners to 'right-size', freeing up much-needed family accommodation;
- incentivising those of pensionable age to remain in part time employment and encouraging employers to support this;
- creating a 'University of Jersey';
- the introduction of training quotas and
- congestion charging.

Social Media

Posts on Government Social Media channels posed questions²⁴ related to population, designed to stimulate interest in the public survey. Approximately 400 comments were received, the main themes (which could be related to population and answered the questions posted online) were the following:

- high cost of housing, both purchase and rental and the need for more affordable homes;
- importance of education and skills, including skills pathways for a range of industry sectors and training local people to fill vacancies;
- many young people leaving due to high costs associated with living in Jersey;
- government intervention, such as reviewing taxation or providing subsidies and incentives;
- unemployment, benefits and getting people back to work; and
- a need for something to be done.

5.4 Students and Young People

As a separate part of the public consultation process, a survey was circulated in early July 2021 to students and recent graduates registered with Jersey Student Finance in order to gauge whether those currently living and working outside of Jersey had plans to return, and if not, to explore their reasons. There were 62 survey responses submitted.

²⁴ How do we find space for homes for key workers?

What do you think we should do to retain or attract young people to Jersey?

How do we provide interesting career choices for local children?

What steps would you support to effectively manage the Island's population?

What steps would you be willing to take to reduce the number of migrant workers needed in future?

Results were considered alongside those of an earlier survey conducted in 2020, by Jersey Finance, Digital Jersey and Skills Jersey, which sought information from residents who had left the Island to work or study, as well as those who had returned, in a bid to explore what could be done to make returning to Jersey easier or more inviting. The 2020 survey was intended to gather information from the local diaspora to assist the development of the Post-16 Education Strategy. The pandemic placed this work on hold and the revised objectives remain undecided, but the data was reviewed for relevance and comparative purposes.

Headline findings from the Student and Recent Graduates' survey were as follows:

Return to Jersey: 48% of those surveyed planned to return to live in Jersey within 5 years, 23% said they would definitely not return and 29% were undecided;

Not planning to live in Jersey within the next 5 years: those who said they definitely would not return were asked what factors had led to this decision. The high cost of housing was the most common reason (chosen by 83% of respondents) followed by high cost of living (63%), better job prospects elsewhere (61%) and a lack of social and cultural opportunities (50%). Less than 40% indicated that they could not pursue their chosen career in Jersey following graduation and 26% considered that Jersey was too crowded;

Planning to return to Jersey: of those who thought they would live in Jersey within the next 5 years, 80% said that this decision was influenced by family and friends being here, 73% thought Jersey was a safe place to live and 64% chose the Island's beaches as a decision making factor. 22% cited job prospects as being a determining factor in their decision to return; and

Other comments: finally, participants were asked what they thought would make Jersey a better place to live and work. Almost 80% of respondents provided comments and of these, 65% identified the cost of housing as an issue needing to be addressed. '*Cheaper housing options for young people,*' '*no reason for young people to stay on island unless they intend to work in the finance sector,*' '*help with buying a first home*' and '*it is impossible for the younger generation to buy a decent property for a decent price*' were typical of the comments made in this section.

Similar themes emerged when the survey results were compared with the results of those in higher education who completed the 2020 diaspora survey. In 2020, lower house prices were stated as the number one change that could make those in higher education or working outside Jersey consider returning to the Island.

The views of children and young people in Jersey are important and will be taken into account as the population policy is developed. The views of younger Islanders who are students, in higher education or have recently graduated, have been sought directly with regards to whether they will return to after their studies, and if not, the reasons for this decision. In the case of those below the age of 18, a significant body of research has already been published which reflects their views on a range of issues directly related to population – housing, traffic, the environment, employment and family life.

The Life on the Rock survey²⁵ earlier this year looked at housing issues through children's eyes. Primary school-age children recognised that where families live is sometimes connected to their parents' work, and that accommodation is not always satisfactory. There was also a recognition

²⁵ [Life on the Rock](#); Children's Commissioner 2021

that housing in Jersey is expensive. This was echoed by respondents of secondary school age, who also considered that certain areas of the Island, such as St. Helier, were overpopulated and that the government should do more to regulate housing for migrant workers and their families.

The unqualified housing sector was also identified by respondents to the Children’s Commissioner’s Island-wide consultation of 2018²⁶, which identified the negative effect that living in poor quality homes had on some families.

A key message from the Life on the Rock consultation was that there should be a greater emphasis on the transition from school to adult life, with life skills lessons normalised in schools to prepare young people better for the outside world. Young people also felt that the school curriculum was too focused on academic attainment, with lower priority given to vocational subjects. Careers advice in schools should be improved, which will empower young people to shape their own future based on their aptitudes, abilities and preferences.

Young people in the survey also equated ‘densely populated towns’ with too many cars, traffic jams, lack of parking spaces and high parking charges. They felt that public transport should be improved, both for convenience and environmental reasons.

5.5 Industry, stakeholder and individual consultations

Alongside the structured consultation processes, contributions to the population discussion were invited from industry and Islanders; the following table summarises the additional engagement which took place:

Type of engagement	Number / details
Written submissions from individual Islanders	33
Written submissions from businesses and industry representative groups	Jersey Business Jersey Water Jersey Finance Jersey Farmers’ Union IoD Jersey Digital Jersey Jersey Hospitality Association Jersey Chamber of Commerce Jersey Royal Company
Meetings with individual Islanders	6
Meetings with representative groups or individuals	Jersey Hospitality Association Jersey Chamber of Commerce Jersey Business Jersey Construction Council IoD Jersey Digital Jersey Romanian Honorary Consul to Jersey Polish Honorary Consul to Jersey

²⁶ [Island Wide Report – Findings: Children’s Commissioner 2018](#)

Meetings with business owners and managers	Large agricultural business Large retail business Large construction business Round table discussions with small business owners (2 meetings with a total of 12 business owners from various sectors including retail, hospitality, agriculture, finance, professional services, IT and recruitment)
Meetings with Government representatives	Chief Executive Group Director - People and Corporate Services Skills Jersey Council of Ministers – 2 workshops with Ministers and Assistant Ministers Individual Ministerial meetings
Engagement with States Assembly Members	In-Committee debate (March 2021) Hearings with the Migration and Population review Panel (3)

This section summarises key messages raised during the stakeholder consultation.

Housing

The availability and affordability of housing was an issue raised by all groups, and was perceived to be a direct consequence of a burgeoning population. Many individuals wanted the Government to intervene in the housing market, either by restricting the ability to purchase or providing financial assistance for groups such as first time buyers and returning graduates, as well as increasing the housing supply by building more homes.

Industry representatives in all sectors identified the difficulty finding suitable or affordable accommodation as a barrier to filling staff vacancies and some suggested the Government should investigate short term, temporary accommodation options to house incoming workers. In the longer term, the freeing-up of States-owned sites for affordable housing and key-worker accommodation was considered essential. Particular emphasis was placed on ensuring housing was available for those working in healthcare, hospitality and construction.

A strategy to incentivise right-sizing, which would potentially make larger units available to families, was proposed by individuals and some small business owners. Others suggested tightening controls in the buy to let market and supporting the creation of new housing developments around parish hubs.

Business owners identified issues with planning around the inflationary effect of rezoning agricultural land and buildings for housing, and project delays resulting from the time taken to obtain planning and building permission, all of which contributed to the lack of available housing.

Most States Members' contributions to the In-Committee debate on population in March 2021²⁷ referenced the current pressure on housing and the need to ensure an adequate supply. The increasing 'urbanisation' of St. Helier was also commented upon; some Members also suggested that streamlining the planning process and addressing the issue of empty properties would be beneficial.

Recruitment challenges

All groups mentioned the immediate challenges faced by businesses as a result of the pandemic, and the longer-term issues related to Brexit. Having previously relied upon recruitment from countries across Europe, businesses had struggled to fill vacancies from within the Common Travel Area post-Brexit, especially as furlough schemes still operated in many areas of the UK. Recruitment from Europe had become more difficult as Europeans now need immigration permission to travel to the UK/Jersey, with associated cost implications. Additionally, improving economic circumstances in European countries which have previously been a source of labour for Jersey businesses has resulted in many individuals electing to stay in their home country, rather than travel to Jersey to work.

Businesses reported that this issue was not limited to lower-paid workers in industries such as hospitality and agriculture, but that finance and professional firms faced similar recruitment challenges. Those in the sector warned that multi-jurisdictional businesses were agnostic about where their employees were based, and if the costs of employment were too high there was a danger that staff would be relocated and Jersey would experience a significant outflow of talented individuals, along with the associated loss of tax revenue.

Tax policy

Individuals and small business owners felt that the current zero-10 system should be reviewed and the emphasis shifted away from personal taxation. Small business owners in particular were already making use of remote and flexible working within their businesses and it was acknowledged that the tax system would need to adapt in light of new business models. High Net Worth Individuals were mentioned by several individual respondents, but there was no consensus regarding whether their tax rates/contribution should be reviewed. Others suggested introducing higher taxation for property investors, vehicles over a certain engine capacity and taking steps to address the 'cash in hand' economy. Fiscal measures were also proposed as a means of encouraging employees to remain in the workforce for longer, and to incentivise employers to provide training for staff.

Importance of Data

Small business owners and industry representative groups all commented on the current lack of data on which to base a population policy, specifically the results of the 2021 Census and data on how many people had left the Island (predominantly as a direct consequence of the pandemic) and not returned. Several contributors advanced the view that the number of individuals in the working population was a more important and relevant statistic than the population size overall and the majority of Members speaking on the subject during the In-Committee debate felt that population should not simply be 'a number'.

²⁷ [States Assembly In-Committee Debate 24th March 2021](#)

Importance of Education, Skills and lifelong learning

The importance of education in order to build a skilled workforce for the future was universally acknowledged amongst contributors and was the theme most frequently referenced in the In-Committee debate. Equipping school leavers with the right skills to enter the workplace was given a high priority. It was perceived that significant emphasis is currently placed on students getting a university education and that vocational training and apprenticeships should be more widely available, with these students given equivalent financial support.

It was also agreed that technological advances made it increasingly important for people to continue to undergo relevant skills training throughout their working life, especially older workers who could be 'left behind' by technology.

Many referred to the talent pool in the Jersey diaspora and felt that more should be done to encourage young people who had been educated in Jersey to either return following completion of their higher education or a period of work experience, as this would reduce the need to source skilled labour from elsewhere.

The concept of further developing Highlands College / University College Jersey, possibly opening up courses to students from elsewhere, was suggested to drive an upskilling agenda, help to rebalance the demographic challenges and grow the local talent pipeline.

Preserving the Environment

Contributors to the consultation recognised that Jersey is special and referenced the Island's unique natural environment, as well as its heritage and culture. There was a general agreement that this should be preserved for future generations and that allowing unrestricted population growth would prevent this from happening. Preserving / not damaging Islanders' quality of life was viewed as a priority; many contributors also included commentary on traffic congestion and support for sustainable transport strategies.

Ageing Population

The consultation provoked much commentary on the fact that people in Jersey are living longer and therefore a smaller proportion of the population will be supporting those who are no longer working. Many also identified a growing need for care workers in future, to support the ageing population. Some individual contributors, as well as those in industry, felt that the trade-offs between maintaining the working population at its current level, and the financial consequences of not doing so, were not widely understood. One contributor explained the issue as a choice between two available options: *'seek to ensure that the working population remains at the same level OR seek to maintain the population at the same level and accept that this will have an adverse impact on standards of living.'*

Conclusion

Ministers are grateful to everyone who took the time to contribute to the consultation process and for the many diverse views expressed. However, some common themes did emerge from the overall process and these themes form some of the fundamentals of this first common population policy. There was wide and strong support for improving the education and skills training available. This was seen as a positive step towards helping to reduce the need for future inward migration.

It was also clear that successive governments have failed to provide information on population issues that is accessible to the general public. Much more needs to be done to both improve the information available on population issues and to communicate this information to all interested parties so that future discussions can draw on clear statistics and evidence that is not currently available.

6. What will the annual population policy report include?

This is the first time that the Council of Ministers has made a commitment to maintain a common population policy.

This commitment must be long-term in order to be meaningful. Inevitably, priorities will change over time, but this first document sets out a long term vision and framework within which individual Ministers will identify current issues and areas for action.

The Council of Ministers has agreed to adopt long term policies that will progressively reduce the need for net inward migration. In future, population issues will be considered within each electoral cycle and statement of Common Strategic Priority and the agreed actions will be embedded within each annual Government Plan. The Common Population Policy will maintain a consistent long-term direction but allow for short term issues to be addressed.

The Government Plan 2022-25 has already been published and accordingly, the first Common Population Policy must sit within its existing resources and commitments. Following the general election in June 2022, it will be for the next Council of Ministers to determine a more comprehensive set of actions, in accordance with its strategic priorities.

In this first policy document, it is important to set out the content that will be expected on an annual basis and the range of issues that will be addressed.

Ministers suggest that future reports should include:

- a summary of current data and projections, including areas where data is needed but is not yet available;
- a report on actions taken in the last 12 months with outputs and outcomes identified;
- an update on relevant legal, policy and operational structures (principally in relation to Immigration Rules and the Control of Housing and Work law);
- a set of agreed measures and indicators that monitor performance across a range of population related areas;
- A summary of any reports requested by the Chief Minister from the Population Advisory Council²⁸, or written recommendations given to the Chief Minister by the Population Advisory Council on any matters pertaining to the CHWL or population policy generally;

²⁸ An independent, statutory expert panel which will be created under the amended CHWL to research and advise on population matters.

- a set of commitments for the following 12 months;
- a forward look to identify and review medium and long-term goals
- a forward look to consider the implications of anticipated developments in technology;
- an assessment of the long-term position and any adjustments to long-term aims; and
- a review of current risks and issues for the Island relating to population policies.

7. Ministerial priorities and responsibilities

Ministers, acting within their individual areas of responsibility, have collectively agreed to take action against a number of different headings. This section sets out a series of key Ministerial priorities and, under each heading, highlights actions to be undertaken as part of the Government Plan 2022-25, as well as areas for development in future Government Plans.

In many cases work is already underway and this will continue in 2022.

Prior to the Covid pandemic, net migration had dropped steadily from a peak of 1,500 migrants in 2015. This number had reduced by a third to 1,000 in 2019. While still high, the downward trend provides evidence that existing measures are helping to reduce the demand for inward migration.

Year	Net migration
2015	1500
2016	1300
2017	1200
2018	1100
2019	1000

It will be difficult to measure the success of these and other planned measures over the next year or so as the impact of Covid and Brexit has had a significant disruptive impact on the overall economy.

However, Ministers are determined to build on this current momentum and introduce new programmes to help to reduce the demand for inward migration across all areas under their control. While this policy proposes to defer to 2025 a decision as to the speed at which a stable population can be achieved, the actions set out in this section to address the issues identified above and to start to move towards a stable population will be undertaken without delay from 2022 onwards.

The actions in the section are grouped into three areas:

- Making better use of data
- Encouraging and enhancing the productive activity of the resident population
- Creating responsive controls in respect of the use of migrant workers

7.1 Making better use of data

The lack of up to date and detailed data to support the development of population policies is a key theme of this first report. Progress has already been made and significant improvements are planned for 2022 (see Section 4).

A full analysis of the 2021 Census information will be published during 2022. This will provide a very detailed snapshot of the resident population as at March 2021.

Ministers need regular information on the use of the migrant labour force and current skills and labour gaps to help them plan effective actions to reduce the need for inward migration. A new IT system is already in development and will be completed in 2022. This will maintain records of all businesses using migrant workers and the workers themselves. Information will be published on a monthly basis providing information on both businesses and workers.

Information will also be collated across Government to help provide an overview of overall population levels. The use of population forecasts across government activities will be co-ordinated to ensure that all relevant activities take account of population changes and, where forward projections are required, these are consistent across government. This is likely to include forecasting across a range of scenarios to allow for prudent planning where the impact of a higher or lower number has differing effects (e.g. in forecasting income, a low estimate may be prudent; in forecasting demand for a service a higher estimate may be prudent within the range of the overall forecast).

Developing data linkage infrastructure between administrative data sets held by departments will provide a base to provide annual estimates of the population, track the journeys of migrants through the CHWL system and produce income distribution statistics based on tax and benefits data.

Understanding the impact of actions that had been taken and identifying the need to focus future actions in specific areas will be key to a successful long-term policy. Ministers will develop a set of measures and indicators which will be used to monitor outcomes across the full range of relevant areas.

As well as collecting better data in order to provide regular information to Ministers and Scrutiny to help guide future population policy actions, Ministers understand the need to raise the level of public awareness in respect of population issues. There is great public interest in this subject but sometimes opinions are expressed without the full facts being available. To achieve the overall aim of reducing the need for net inward migration, actions will need to be taken by everyone - government, businesses and individuals. It is vital that the Government provides clear and accessible information to the public to allow an informed debate on this subject. This is especially important over the next few years as the vision and main foundations of the future policy are developed and implemented.

Expert analysis and advice will be a key component of the common population policy going forwards. Members approved the establishment of an expert body as part of P.137/2020 and this body will be set up in 2022. Once the terms of reference and the remit of the new body are agreed and members recruited, it will start to analyse the new and existing data sources available during 2022 to provide guidance to the next Council of Ministers on the content of future population policy documents.

Minister	Topic	Actions for 2022
All Ministers	Data	Improve co-ordination between and within departments to share data and agree common forecasting assumptions.
All Ministers	Develop Island Indicators for population policy	Review existing performance framework and extend to collect data on performance across all relevant areas
Chief Minister	Census analysis and publication	Publish 2021 Census results. Report on the size and structure of Jersey's resident population, including age, sex, employment and health status of islanders
Chief Minister	Data collection and publication	Implement new IT systems that maintain and report on detailed information in respect of migrant workers and their employers.
Chief Minister	Data collection and publication	Complete the Living Cost and Household Income Survey (LCHIS) - measuring the income distribution and spending of households in Jersey to produce information on household incomes, relative low income, income inequality, and to maintain an accurate RPI. Interim analyses from the 2021-22 LCHIS will be available in time for the new Council of Ministers' Common Strategic Policy.
Chief Minister	Data collection and publication	Progress legislation to amend and enhance the Statistics Law.
Chief Minister	Expert Body	Agree remit and terms of reference for, and then

		recruit experts to new expert body.
Chief Minister	Data collection and publication	Commence project to create links between administrative data sources within government.
Chief Minister	Data collection and publication	Create register of property ownership
Chief Minister and Minister for International Development	Improve public access to and awareness of population data and current issues	As more data becomes available, ensure that good communication channels exist with all parts of the Jersey community to support the dissemination of accurate information and to allow everyone to participate in the ongoing population debate.
Minister for the Environment	Improved data collection and forecasting across government	Develop a long-term infrastructure roadmap for Jersey to inform short- and long-term strategic policymaking and help to understand the costs and consequences for the environment, economy and wider society of future infrastructure choices, including the impact of the Carbon Neutral Roadmap.
Minister for Health and Social Services	Improved data collection and forecasting across government	Start detailed planning and modelling of the health and social care needs of the population to assess the future needs of the island and develop a comprehensive needs assessment.
Minister for Social Security	Improved data collection and forecasting across government	Undertake actuarial reviews of ring-fenced funds.

Minister for Treasury and Resources	Improved data collection and forecasting across government	Introduce a Combined Employer Return from the start of 2022 to provide for a single monthly employment return, bringing together tax, social security and manpower information on workers.
-------------------------------------	--	--

Actions beyond 2022

As an enduring policy with a strong focus on long-term outcomes, the common population policy produced each year should also include a “forward look” to area where Ministers see the need for future action. These are not binding commitments but proposals to be carefully considered in the formulation of the population policy document for the following year or beyond.

There will be a general election in June 2022 and the new Council of Ministers will then prepare its statement of common strategic policy. Areas that the new Council may wish to consider in its CSP document or in future Common Population Policy reports include:

- Take steps towards establishing a full e-census programme
- Maintain focus on improving data collection and analysis across all government activities
- Develop and introduce a robust and secure Digital ID system for use across government

7.2 Encouraging and enhancing productive activity within the resident population

The people of Jersey, the resident population, lie at the heart of the common population policy.

For the policy to be accepted from year to year, it must balance the needs of all the people. It must consider the competing demands of

- Community
- Economy
- Environment

The Government has already made formal commitments within the Public Finances Law²⁹ to maintain this balance. Article 9 of the Law requires Ministers to “*take into account the medium-term and long-term sustainability of the States’ finances and the outlook for the economy in Jersey*” and “*the sustainable well-being (including the economic, social, environmental and cultural well-being) of the inhabitants of Jersey over successive generations*”, when they draw up the Government Plan each year. In future years, the Common Population Policy annual report will be

²⁹ [Public Finances \(Jersey\) Law 2019](#)

part of the Government plan process and will take full account of the balance between these factors.

The success of the policy will not be determined by financial measures alone. The state of the environment and the health of our community spirit will play an important part in future decision-making. Our future economy must include job opportunities that appeal to the abilities and interests of local people throughout their working lives. It must support the increased caring activities that will be needed with an older population. It must respect the environment, both through nurturing and encouraging eco-businesses and through every business taking care to minimise its own environmental impact. Cultural, social and voluntary activities are all essential to a healthy community and the common population policy must ensure that these activities are just as valuable as the activities that drive GVA.

The “productive activity” of this section heading encompasses all of these community, environmental and business activities. These themes will be further developed in future iterations of the common population policy. This first report has a strong focus on education and skills, which will be needed to support all of these activities.

Helping local businesses and residents play an active role in the local economy will be essential to any successful population policy. The Government needs to lead and encourage across various areas. These include improving the productivity of existing business sectors and encouraging the growth of higher value, sustainable business sectors as well as developing community and environmentally focused businesses. Existing workers need support to ensure they have the skills to continue to be active in a changing labour market and children and local residents need a rounded education that prepares them for that changing world of work. For local residents not working today due to a health condition, more needs to be done to help them stay in productive employment and older workers need to be encouraged to remain in the workplace for as long as they want to. New technology needs to be embraced, especially where it can help to remove low value jobs from our economy.

Productivity: Improving productivity per worker is an important aim of this policy. Whereas the economic output of a country can increase if the size of the workforce increases, it is increasing the productivity of individual workers that is needed to help Jersey reduce its reliance on inward migration. Average productivity has declined in real terms since 2007³⁰. The productivity per FTE of the finance sector has reduced from £207,000 pa in 2007 to £139,000 pa in 2020 (in 2020 real terms). Most of the long-term decrease in productivity in financial services occurred from 2007 to 2010. A key factor behind the decrease in productivity in financial services during this period was a reduction in the Net Interest Income (NII) of the banking sub-sector. This compares with an average productivity for non-finance sectors of £49,000 in 2020.

The Government provides ongoing support to various economic sectors, helping them improve their productivity. These include the marine, visitor, retail, export and aviation sectors. In addition, Ministers launched a pilot Productivity Support Scheme³¹ for small businesses in summer 2021, to help small businesses (with less than 20 staff) improve their productivity levels. Funding was offered on a 50:50 matched basis to companies who were able to illustrate plans which would improve their productivity, whether through automation, efficiencies or upgrading facilities.

³⁰ [Measuring Jersey's Economy GVA and GDP 2020](#)

³¹ [Productivity Support Scheme pilot \(gov.je\)](#)

Pending a review of the pilot scheme, this work will continue to support small businesses via the Future Economy Programme in 2022. The Rural Initiative Scheme³² also offers funding to agricultural and marine businesses for productivity enhancements. Both schemes aim to offer funding to businesses to improve their productivity and ultimately drive reliance away from lower skilled positions.

To help local businesses, the Government funds Jersey Business. This organisation supports businesses to participate in the Productivity Support Scheme and also provides specialist advice to businesses via their Business Improvement Programme³³ both individually and via workshop sessions, in order to drive process improvements which will increase efficiency and stimulate investment in new technology.

As well as actions to directly improve productivity, the States Assembly has recently approved a plan to improve minimum wage rates up to 2/3 of median wages by 2024³⁴. The minimum wage for 2022 will achieve the target set by the Assembly some time ago to reach 45% of mean earnings. This has already led to increases in wages in many sectors. A further significant increase in minimum wage rates over the next 3 years will act as an additional incentive to businesses to improve their productivity and reduce their reliance on low waged employees. Higher wages increasingly force businesses to choose between labour and automation and over time have an impact on the viability of marginal businesses that then release labour back into more productive areas of the economy.

Education and skills: These are critical areas within the overall population policy. The education system ensures that future citizens are provided with the knowledge and skills they will need as adults. Whilst a good education sets up a young adult for the world of work, most people will move jobs and have several careers in their working life. Therefore, a comprehensive and accessible skills policy is essential to ensure that all workers can undertake productive work at each stage of their working life.

The ability to reduce the need for inward migration will be a function of how far the pool of talent and skills in Jersey evolves to match the changing needs of the economy. In general, international evidence shows that increasing educational levels across age groups is beneficial for the economy for several reasons, one of them being that older workers remain employed for longer³⁵. Across OECD countries, well-educated people increasingly work longer than the less-skilled. By contrast, those with lower levels of education often have low employment rates at older ages, suggesting that there may be potential for longer working lives if relevant training is provided.

The public survey showed very strong support for actions in these areas. When asked to prioritise a range of possible government actions, the 3 highest scoring actions from the public survey were:

- invest in lifelong learning so that local workers can be retrained to adapt to new jobs and technology (76%);
- improve educational outcomes for all children so that local young people are well trained to work in the local economy (73%);

³² [Rural Initiative Scheme \(gov.je\)](https://www.gov.je/rural-initiative-scheme)

³³ [Business Improvement Programme | Jersey Business](https://www.gov.je/business-improvement-programme)

³⁴ [P.98/2021 \(as amended\) Minimum Wage increase](#)

³⁵ [E.g.: Towards More Inclusive Ageing and Employment Policies: Lessons from France, The Netherlands, Norway and Switzerland \(Sonnet, Olsen & Manfredi - 2014\)](#)

- encourage local students to return to the Island on completion of higher education (64%);

Education: Education forms a fundamental strand of the Government’s first strategic priority. In 2022 the Education Reform Programme will continue with further releases of new resources enhance the drive to raise standards of teaching and learning across the entire Government-provided system.

Following the publication of the forthcoming Skills and Productivity White Paper the Government will develop a clear vision and strategy for the further and higher education provision on the Island. This will be linked with the Economic Framework’s ambition to develop a Skills Expander to ensure a future proofed workforce, and will develop the aspiration of the Jersey Employers Group Strategic Workforce Plan for a feasibility study prior to the physical re-provisioning of Highlands College.

The development of an ‘Inclusion Implementation Roadmap’, the launch of a multi-agency, multi-disciplinary intensive support service for children, young people and families, and an extension to Mont a l’Abbé secondary school will maintain the commitment to ensure all children and young people enjoy the best start to life.

A review of the student finance system to address its long-term sustainability will be completed in 2022, leading to the introduction of a new funding model for the 2023 academic year. The overall ambition for the new funding model will be to encourage graduates to return to Jersey following completion of their studies.

A digital training strategy is being planned by Children, Young People, Education and Skills in partnership with Digital Jersey Academy, to deliver training for school staff through a mix of online learning and practical workshops. The training will feature as part of a Digital Education Review and Strategy roll out in 2022, and will support teachers to deliver innovative teaching and learning with the latest technology and online tools available.

The Government of Jersey offered paid internships for the first time in 2021, offering 34 graduates the chance to experience the diverse range of career opportunities within the public service., It is anticipated that this programme will be repeated in 2022.

Skills: OECD evidence shows that only 41% of adults typically undertake job-related training and the number of older workers participating in training is often low, including in developed economies. If older people fail to adapt to new technologies and re-invent themselves, their skills could become outdated and they may be forced to remain inactive. Early retirement just makes the ageing challenge worse.

The Economic Council ³⁶ endorsed the importance of lifelong learning in its December 2020 report, ‘New Perspectives’³⁷ observing that *‘the pace of change in the world as a result of the Fourth Industrial Revolution will only increase, making a life-long learning environment essential to ensuring our Island’s ability to develop and maintain relevant skills in the Island.’*

A recent report from PWC as part of the Future Economy Programme made similar comments: *“Jersey, like elsewhere, is not sufficiently prepared to respond to the accelerated pace of change brought about by megatrends such as automation and ageing populations (and now magnified by*

³⁶ The Economic Council is an independent group set up as part of the Future Economy Programme.

³⁷ [New Perspectives](#)

the Covid-19 pandemic). Specifically, Jersey does not have a robust upskilling and reskilling system that is fit for purpose for the fourth industrial revolution.”³⁸

The Jersey Employer Group³⁹ is an independent body which brings together representatives from all industry sectors, including the public service, to help ensure that the Island's workforce is prepared for the jobs of the future. The Group's June 2021 report: 'Developing a Strategic Workforce Plan for Jersey'⁴⁰ recommended a 2-phased approach to ensuring that the Island's workforce is ready for the challenges posed by increasing automation and demand for new skills.

With industry leaders reporting a 'state of readiness' with regards to future skills capabilities which was between 5 and 10 years away from optimal, the Jersey Employer Group recommended that, in the short term, Jersey should continue to buy in skills from other jurisdictions. The Group considered that this would be followed in the longer term by a plan relating to education and partnerships, which would entail developing these skills from schools and nurturing talent to ensure it returns to the Island after university, as well as developing key partnerships to collaborate, share knowledge and build skills for the future.

These external views from local experts identify the scale of the problem to be addressed.

Given that it is currently estimated that almost a third of jobs currently existing in the Channel Islands could be lost to automation by 2035,⁴¹ the importance of providing relevant training and upskilling opportunities for all Islanders cannot be overstated.

Ministers fully accept the magnitude of the reskilling challenge and the centrality of actions in this area to help to address the goal of reducing our reliance on net migration.

The Skills and Lifelong Learning Directorate within Children, Young People, Education and Skills is the integrated service for all government funded lifelong learning, skills and educational provision and includes Skills Jersey and the Jersey Youth Service. Offerings within the directorate include traineeships for 16-19 year olds, funded apprenticeships, vocational courses at Highlands College/University College Jersey (from entry level to degree standard), support for businesses, employer engagement and careers guidance. Current workstreams that will continue into 2022 include:

Retraining Strategy – this strategy is examining the range of existing training to ensure the most effective provision, management and funding of these services for the future. It will also identify future strategies and schemes which support social mobility, whether that be through career changes or upskilling.

Skills Recovery Programme – the overall aim of this programme is to support both young people entering into training and employment, and adults who need to re-skill. In 2021, Highlands College partnered with Digital Jersey and Skills Jersey and secured £1.7m from the Fiscal Stimulus Fund to provide free places on courses to Islanders. The courses were

³⁸ These challenges were highlighted in the Jersey Labour Needs Pre-Assessment Report which was commissioned to inform the Bridging Island Plan in early 2020. It explores how to build an evidence base to determine the balance of on-island talent versus immigration requirements, which in turn is a key determinant of population growth, and thus of capacity and infrastructure requirements.

³⁹ [Jersey Employer Group \(gov.je\)](https://gov.je/jersey-employer-group)

⁴⁰ [JEGStrategicWorkforcePlanFinal.pdf \(gov.je\)](https://gov.je/jegstrategicworkforceplanfinal.pdf)

⁴¹ [Upskilling the Channel Islands' workforce for a Digital World, PWC 2020](#)

chosen specifically to boost productivity, address skills gaps, and support young people who may be returning to education after the pandemic.

In 2021 a Youth Hospitality programme was run for 14-19 year olds in partnership with industry and a new traineeship to support 16-19 year olds to achieve qualifications and work experience was created.

For 2022 an ongoing collaboration and growth of industry skills groups both working with the Jersey Employer Group and direct to individual industry bodies will continue.

Apprenticeships - in 2022, a revised apprenticeship offering will be developed, which will include yearly incentives decided on in partnership with the Jersey Employers Group. These incentives will prioritise funding based on priority needs, such as the demand in industry sectors or aimed at apprentices aged between 16-19 or over 50. The revised funding model will mean greater control and collaboration with the employers of apprentices.

From 2017, annual fees have been imposed on employers within the Control of Housing and Work scheme. Employers now make regular payments to maintain permissions to employ migrant workers, both at the registered and licensed level. These fees encourage employers to minimise the number of migrant permissions that they hold and help to support the cost of maintaining the migration control system with 50% of the additional funding allocated to provide additional investment in skills and training.

Economic framework: The delivery of a new economic framework forms part of the Government's 3rd strategic priority⁴² as agreed by the States Assembly in 2018 and subsequent Government Plans. The stated aim of the Council of Ministers is to create a '*sustainable, vibrant economy and skilled local workforce for the future.*'

In June 2020, the Government appointed PwC as their strategic partner for the Future Economy Programme. The Future Economy Programme intends to shape the long-term future direction of the Jersey economy, with a focus on productivity and skills. A key milestone is the creation of a new Economic Framework for the Island in early 2022. The Economic Framework will comprise a public facing economic strategy detailing the Government's long-term vision and aspiration for the future of Jersey's economy. This will be supplemented by the development of new strategic alignment and policy prioritisation tools that will help assess the economic impact of policy interventions and measure alignment with the programme's cornerstone objectives.

Following the appointment of PwC, work began to set the direction of travel towards an Economic Framework for Jersey in the context of the dual economic shocks of Brexit and Covid-19. This work developed and built analysis around five cornerstone objectives for Jersey's future economy:

- productive and resilient businesses;
- households that are resilient and share in growth;
- island identity and reputation;
- highly skilled workforce; and
- an economy that operates within environmental limits.

⁴² [Council of Ministers Proposed Common Strategic Policy 2018-22](#)

These in turn sit within the broader Jersey Performance Framework and KPIs for the Island's community and environment as a whole and align well with the Economic Council's 'New Perspectives' report.

There are of course significant synergies and trade-offs between these objectives, as well as a number of structural and cross-cutting challenges and constraints that will need to be considered in detail during the development of economic strategy. Population, and within this the implications of the ageing population, alongside migration, is probably the most challenging of these.

'New Perspectives – Critical Considerations for Sustainable Economic Growth' is a report published in December 2020 which set out the preliminary views of the independent (i.e. non-States Assembly) members of the Economic Council. The Economic Council's core recommendations, whilst made principally to facilitate sustainable economic growth in the longer term, also align with strategies which would contribute to a sustainable population – embracing innovation, upskilling the workforce and embracing new technology.

Technology: Digital Jersey, in its Strategic Plan 2021-26,⁴³ aspires to boost Jersey's overall productivity through the use of technology and the growth of 'digital' as a pillar of the economy. Their 5 year plan recommends that the Island should proactively accelerate the adoption of technology, lessening demand for people while increasing productivity of businesses. Programmes are already established in this area. For example, CYPES is working closely with the Digital Jersey Academy, to support students leaving secondary education, those currently in the digital sector looking to up-skill, and those in other industries looking to enter the digital sector.

The digital health sector is growing fast and offers significant opportunities to enhance the productivity of existing staff and limit the need for increased staffing as the population ages. The use of modern methods of construction for new residential developments can lead to reduced build times, higher quality buildings with smaller teams of workers. Likewise, green technology is offering up new career paths as the Government seeks to achieve its climate emergency targets.

Participation: Ministers are committed to supporting a healthy workforce and providing a labour market where people with disabilities and long term health conditions are able to contribute as much as they want to. The new Jersey Care Model is focused on helping the population to stay healthy and encouraging healthy behaviours. 2022 will see a significant investment in an expanded Public Health team to address health issues at a population level. At the same time, a major review of incapacity benefits is currently underway with the aim of significantly improving the support available to workers when they have a health condition, to support them to remain in work or help them return to work. Workers often have caring responsibilities and the workplace needs to accommodate those family commitments while also supporting the carer to continue to be economically active.

Public Sector: The Government employs 14% of the local workforce. The Government, as an employer, can lead the way in improving productivity, providing skills training, utilising technology, and increasing participation.

The continued investment in the Integrated Technology Solution will modernise services, release capacity within the workforce and improve productivity.

Utilising an intelligence and data led approach will define our future skills needs, and workforce and talent planning will develop, attract and retain local talent through apprenticeship programmes and professional development pathways.

⁴³ [5 Year Strategic Plan | Digital Jersey](#)

Developing flexible working will allow Government to be a more inclusive employer, improving the employer experience, increase participation and enable parents and guardians to put children first.

Minister	Topic	Actions for 2022
Chief Minister	GOJ as employer	Develop, attract, and retain internal and on island talent through access to a range of skills development programmes
Chief Minister	GOJ as employer	Continue to develop and enhance public sector working conditions including the supportive culture programme in Team Jersey, planning for the delivery of new technology platforms, and new OneGov headquarters.
Chief Minister	GOJ as employer	Internships: Continue to provide paid internships to local graduates across diverse range of public sector career opportunities.
Minister for Children and Education	Education – Supporting every child and young person to achieve their full potential in the adult world	Education Reform Programme - This programme will continue through 2022 building on the work completed in 2021. Further releases of new resources will enhance the drive to raise standards of teaching and learning across the entire Government-provided system.
Minister for Children and Education	Education – Supporting every child and young person to achieve their full potential in the adult world	Complete the assessment of the tertiary / post 16 and Higher Education requirements for the island and develop a strategy for future higher and further education provision.
Minister for Children and Education	Education – Supporting every child and young person to achieve their full potential in the adult world	Complete the review of student finance, to provide for a new funding model from 2023, with the aim of encouraging graduates to return to Jersey.
Minister for Children and Education	Education – Supporting every child and young person to achieve their full potential in the adult world	'Inclusion Implementation Roadmap' – define the barriers to inclusion and develop a 'Common Framework for Inclusive Practice' in schools and settings.
Minister for Children and Education	Education – Supporting every child and young	Develop and introduce an integrated intensive support service for young people

	person to achieve their full potential in the adult world	considered to be the most vulnerable, at risk or risk to others.
Minister for Children and Education	Education – Supporting every child and young person to achieve their full potential in the adult world	Make good progress on the Mont a L'Abbé extension project to provide a fit for purpose Key stage 5 provision and enhance the transition experience for 16+ pupils.
Minister for Children and Education	Education – Supporting every child and young person to achieve their full potential in the adult world	Deliver the Digital Education Review and Training Strategy in partnership with the Digital Jersey Academy
Minister for Children and Education	Skills for a well-trained workforce	Retraining Strategy - Review and enhance the range of existing training available and identify future schemes to support social mobility through career changes and upskilling.
Minister for Children and Education	Skills for a well-trained workforce	Skills recovery programme - continue to support adults of all ages who need training and re-skilling support, working with the Jersey Employer Group and individual industry bodies.
Minister for Children and Education	Skills for a well-trained workforce	Apprenticeships - develop a revised scheme, aimed at incentivising priority demands from year to year
Minister for Economic Development, Tourism, Sport and Culture	Productivity	Review the 2021 Productivity Support Scheme pilot and launch a new Productivity Scheme for 2022 to enable businesses to enhance their productivity levels through investment
Minister for Economic Development, Tourism, Sport and Culture	Productivity	Deliver a new Rural Economy Strategy for 2022-2027 which will include provision of a Rural Support Scheme and Rural Initiatives Scheme to support increased productivity, greater alignment with local consumption and judicious use of our island's resources.
Minister for Economic Development, Tourism, Sport and Culture	Productivity	Work with Visit Jersey to support growth of the visitor economy throughout the year, with particular focus on the shoulder months of the season.
Minister for Economic Development,	Economy – building a sustainable economy for the future	Future Economy Programme - Deliver a public facing economic strategy detailing the Government's long-term vision and

Tourism, Sport and Culture		aspiration for the future of Jersey's economy. This will be supplemented by new strategic alignment and policy prioritisation tools.
Minister for Economic Development, Tourism, Sport and Culture	Economy – building a sustainable economy for the future	Economic Recovery - Lead the ongoing recovery from the Covid-19 crisis to support the creation of a sustainable, vibrant economy and skilled workforce for the future.
Minister for Economic Development, Tourism, Sport and Culture	Technology – taking advantage of new developments	Digital Health programme - Pilot digital and other innovative support / proactive schemes to enable people with care needs to remain living in their own home
Minister for the Environment	Technology – taking advantage of new developments	Encourage the use of green technology by local businesses
Minister for Health and Social Services	Participation	Continue to develop the Jersey Care Model, which emphasises preventative measures to support a healthy population.
Minister for Housing and Communities	Participation	Encourage the use of Modern Methods of Construction in residential developments
Minister for Social Security	Participation	Instruct Employment Forum in 2022 to review minimum wage rate for 2023.
Social Security	Participation	Complete the review of support for workers claiming contributory benefits due to ill health to create a system that intervenes early to support workers to remain active within the labour market and minimises the impact of ill health on the individual worker and the overall economy.

Actions beyond 2022

As an enduring policy with a strong focus on long-term outcomes, the common population policy produced each year should also include a “forward look” to areas where Ministers see the need for future action. These are not binding commitments but proposals to be carefully considered in the formulation of the population policy document for the following year or beyond.

There will be a general election in June 2022 and the new Council of Ministers will then prepare its statement of common strategic policy. Areas that the new Council may wish to consider in its CSP document or in future Population Policy reports include:

- Consider the political responsibility for Skills. This currently sits with the Minister for Children and Education whose primary focus is appropriately the need to provide first

class services and educational opportunities to children and young people. A Minister, or Assistant Minister, with full responsibility for skills across all programmes, working very closely with the Minister for Economic Development, Tourism, Sport and Culture, could provide the political champion needed to drive this key area of population policy in future years.

- Following the outcome of the actuarial review to be completed in 2022, consider further increasing the State Pension Age after 2032, combined with allowing workers to continue to make contributions and claim a higher pension at an older age
- Acknowledging the advice of the Fiscal Policy Panel that the Government should not seek to raise additional revenues in the short term, consider how future tax and social security regimes might adapt to:
 - account for increased off island remote working for local businesses and automation of roles;
 - track the global debate on taxation of robots and its suitability to Jersey; and
 - support upskilling, lifelong learning and increased participation.
- Maintain focus on improved productivity, including greater awareness and use of digital solutions.

7.3 More Responsive Controls

Immigration Controls

Following Brexit, the beginning of 2021 saw the end of the free movement of EU nationals in the UK and Jersey, which increased barriers to non-CTA labour. Whilst Jersey is aligned to the UK Immigration system, there are also some immigration routes specific to Jersey for workers to meet the needs of local businesses. In 2022 the Jersey Customs and Immigration Service (JCIS) will continue their work to deliver a modernised post-Brexit immigration system that aligns with the CHWL migration control policy and systems, the common population policy, the Common Travel Area free movement requirements, and that supports Jersey's labour market.

Jersey's Immigration control is legislatively linked to that of the UK and the rest of the Common Travel Area (UK, Ireland, Jersey, Guernsey, Isle of Man) and administered by the Jersey Customs and Immigration Service (JCIS). Whilst it remains a member of the CTA Jersey has a legal obligation to align its immigration legislation and therefore its immigration policy and controls to that of the UK. Within that Jersey has the ability to adjust these controls to meet its own labour needs. Since Brexit (01/01/2021) all foreign nationals (not British or Irish) have required an immigration permission to work in Jersey. This has resulted in a significant rise in the number of immigrants arriving in Jersey under an Immigration permission.



Figure 13: Immigration Work Permits issued by JCIS 2011 – Nov. 2021

Current CHWL controls affect everyone who wants to reside and work in the Island, even if they were born here, but affords no rights outside of the Island.

Jersey's immigration controls are entirely based around a person's nationality no matter where that person is resident. Immigration permissions granted in Jersey provide rights for a person anywhere within the Common Travel Area including Jersey.

Employers require a CHW business licence before applying for a work permit for an immigrant worker. If an immigrant fits within the rules attached to their immigration route and a business licence is in place, they will be granted an immigration permission. There is no immigration limit on the number of applicants, the control on numbers is provided by the existence or not of the CHW business licence.

Current Post Brexit Immigration routes were agreed following consultation between the Minister for Home Affairs, wider Government, industry sectors and the Home Office. The principal ones are as follows:

- Skilled Route – up to 3 years (can be extended, requires English language, can bring dependants and leads to ability to settle after 5 years)
- Temporary Route (Construction) – up to 1 year (can be renewed up to 4 years, no dependants, does not lead to settlement)
- Temporary Route (Agriculture and Fisheries) – up to 9 months (must leave after for 3 months, no dependents, does not lead to settlement)
- Temporary Route (Hospitality) – up to 9 months (must leave after for 3 months, no dependents, does not lead to settlement) (a one-off 9 month extension is available in some circumstances)

It should be noted that the Temporary Immigration routes are bespoke to Jersey and were designed to assist Jersey employers.

Those granted limited immigration permissions (Limited Leave to Remain) to work or study within the CTA may visit other parts of the CTA but may only work or study and reside in the jurisdiction where their permission was granted. However, those that achieve five years' continuous residency on immigration routes that lead to settlement will be eligible for Indefinite Leave to Remain or Settled Status. These statuses are recognised across the CTA and allow that person to move and settle in any of the other CTA jurisdictions. Put simply, immigration decisions made in Jersey have an impact on the UK and vice versa therefore close alignment with UK immigration legislation is required and it must be recognised that this stands separately to any domestic policy criteria.

In 2022 the Minister for Home Affairs will continue to ensure that individuals under Immigration permissions comply with their work permit conditions, including leaving the Island when required. Robust immigration controls will be maintained whilst liaising with industry and wider Government to support Jersey's labour market. (For example, a one off 9 month extension for Hospitality workers has recently been introduced). Ministers will work together to ensure that the immigration system responds to the amended CHWL migration legislation while maintaining the Island's wider Immigration commitments associated with the UK Immigration Legislation.

Migration Controls

Following the Assembly's adoption of P.137/2020⁴⁴ (which removed the automatic 'graduation' from one CHWL permission to another) earlier this year detailed legislation is now being finalised to amend the current CHWL. It is intended that the primary legislation will be lodged by the end of 2021. The new law will allow for significant flexibility to align with changes to common population policy over time, will establish new review and advisory bodies and will introduce a number of new CHWL statuses. These statuses include:

- i) a 9 month CHWL status that does not lead to permanent residential status;
- ii) a 4 year status that does not lead to permanent residential status;
- iii) a 10 year CHWL status that may lead to permanent residential status; and
- iv) a long term CHWL status that does provide permanent residential status.

Secondary legislation will follow after the general election in 2022, covering in more detail how these statuses will be utilised within the migration control policy, to meet the common population policy. Clear policy and operational guidelines will also be published. A political Housing and Work Control Review Panel will be established.

We will continue the current design and implementation of new customer processes and supporting IT systems. These are planned to be operational during 2022 and will provide for the efficient administration of existing and new migration controls.

Minister	Topic	Actions for 2022
Chief Minister	CHWL controls	Gain approval for primary law changes
Chief Minister	CHWL controls	Develop secondary legislation and seek States Assembly approval

⁴⁴ [Migration Control Policy: P.137/2020](#)

Chief Minister	CHWL controls	Develop and publish policy guidelines to support decision making under new controls
Chief Minister	CHWL controls	Set up political panel to oversee decisions and reviews
Chief Minister	CHWL controls	Agree transitional processes for existing migrants
Chief Minister	CHWL controls	Roll out new migration controls
Chief Minister	CHWL IT system	Complete implementation of new system to support CHWL administration including launch of new application portal. Begin to publish updated statistics
Minister for Home Affairs	Immigration controls	Continue to develop long term policies for immigration controls post-Brexit.

Actions beyond 2022

As an enduring policy with a strong focus on long-term outcomes, the common population policy produced each year should also include a “forward look” to areas where Ministers see the need for future action. These are not binding commitments but proposals to be carefully considered in the formulation of the population policy document for the following year or beyond.

There will be a general election in June 2022 and the new Council of Ministers will then prepare its statement of common strategic policy. Areas that the new Council may wish to consider in its CSP document or in future Population Policy reports include:

- There are areas of overlap between the controls exercised by the Minister for Home Affairs and the controls exercised by the Chief Minister. These two ministerial areas need to be closely coordinated and there may be merit in combining the responsibilities under a single Minister.

APPENDICES

Appendix A: Jersey Resident Population – 2019 Estimate

[R Population Estimate Current 20180620 SU.pdf \(gov.je\)](#)

Appendix B: Jersey Labour Market – June 2021

[R Jersey Labour Market Jun 21 20211028 SJ.pdf \(gov.je\)](#)

Appendix C: Resident Population Projections

[R Population Projections 2016 20161013 SU.pdf \(gov.je\)](#)

Appendix D: Impacts of an Ageing Population on Jersey's Economy 2021 (PWC)

[R.182-2021.pdf \(gov.je\)](#)

Appendix E: Infrastructure Capacity Study Report 2020

[R Infrastructure Capacity Study Report 2020 ARUP.pdf \(gov.je\)](#)

Government of Jersey

Population Policy Focus Groups Research Results

Presentation outline



Research Aim and Objectives

The research project **aim** was to gain Islanders' views regarding a sustainable population size across a 50 year period for Jersey.

Specific **objectives were:**

- exploring islanders' views on Jersey's future population policy
- exploring their tolerance of inward migration to support the economy and keep businesses functioning versus the desire to maintain green open spaces and limit the pressure on Jersey's infrastructure and resources – what trade offs will Islanders accept between the economy, environment and community?
- exploring the extent to which people would be content to remain working for longer or pay higher taxes if this resulted in slower population growth
- exploring why young Islanders do, or do not return - does more work from home/hybrid working impact this?
- exploring views around the hypothesis that population is no longer about a number
- identifying what Islanders perceive the action is that the Government should be taking
- identifying what does success look like for a population policy in Islanders perceptions
- testing some potential early policy concepts/ideas

Outcome: provide representative Islanders insights to help develop the future Common Population Policy and inform a survey to capture a truly statistically representative sample of Islanders views.

Project scope and sample

Scope

- Jersey islanders across a broad socio demographic range.



Sample

A screening questionnaire was developed by 4insight and reviewed and agreed by yourselves prior to use to recruit participants for the focus groups.

This screener ensured that we included a diverse mix and reasonably representative socio-demographics for example a mix of ages, gender, parishes, ethnicities including if Jersey born or not, family situations, total annual household income, plus attitudes to the environment and community. The screener also excluded any respondents who are, or have, immediate family who are part of the SPPP department or senior management in the Government of Jersey plus any media, politicians and political bloggers.

It was key to target a reasonably representative sample of islanders, ie the silent majority rather than the usual vocal minority.

The recruitment for respondents was through 4insight's reasonably representative online panel of over 3,800 islanders then targeting any low represented groups accordingly.

Qualitative Focus Groups



6 focus groups with islanders from a broad mix of socio-demographics, 38 respondents in total. 5 groups with a complete mix of age and socio-demographics to help stimulate challenges during discussion, plus 1 group with those aged 18-30 years old and a mix across the other socio-demographics. The groups were conducted between **July 5th and 8th**. All participants had been screened to an agreed screener questionnaire.

Each group lasted about 90 minutes and was conducted to an agreed discussion/topic guide which was developed by 4insight and agreed by yourselves prior to use. Several projective techniques were utilised and some individually completed exercises were included.

The qualitative focus groups were professionally moderated by a senior member of 4insight utilising initial scene setting and Neuro Linguistic Programming (NLP) to eliminate any potential 'group think', frame the discussion and questions, plus elicit perceptions and forward ideas in respondents representative style.

Detailed Results

Overall emerging themes



Environmental protection

- The environment was perceived as being highly important and valued by most, being viewed as a main attraction for living in Jersey along with a better quality of life.
- Many concerned about the loss of green space and felt maintaining the environment should be a priority to avoid Jersey ending up like a 'Hong Kong'.



Sustainable transport



- Many felt there are too many cars in Jersey with increased population numbers contributing to the traffic.
- Some suggested introducing a sustainable transport scheme to limit the vehicles on the roads.
- Suggestions that large vehicles or families with more than one car could be taxed and incentives should be offered to switch from a petrol/diesel to electric vehicle.



Educational Opportunities

- Need for investment in training/career opportunities to upskill islanders and help reduce the dependency on importing skilled workers.
- Work experience should be offered across a broader range of industries and employers should be encouraged to train/hire on island.



Housing affordability/availability

- The affordability and availability of housing perceived a main issue with a lack of population policy.
- Many felt this will negatively affect the number of young people/talent remaining on island.
- Need for housing support schemes to be implemented such as the 'first time buyers' scheme.



Points-based system

- The majority perceived that a successful population policy is not a number, more a system such as a points-based system or Visa approach.

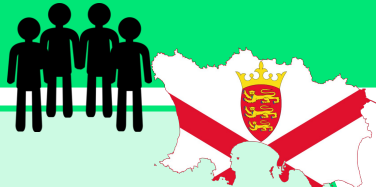
Exercise: “What are the the first words/associations that come to mind when I say ‘Jersey’s Population?’”



Mainly negative
associations/sentiment



Overall Jersey's current population size was perceived 'too big'



Overall, respondents perceived Jersey's current population size as being 'too big' and the Island overcrowded. The majority highlighted the small size of Jersey and how facilities/infrastructure will be unable to cope with the growing population.

Many mentioned the population is ageing and also some come to Jersey to retire or when they are older or wanting to start a family, as Jersey is viewed as a safe place to live.

Some expressed concern over increasing population numbers and the lack of control measures currently in place.

"It's too big, we are geographically limited, physically the island can't cope much more"

"Lots of people coming to Jersey to retire"

"We don't have any control on who comes in at the moment. One person coming in isn't just one person coming in, it's 5"

"Way too many people for an island this size, at the moment we are just about coping but it's starting to become an issue"

"Population keeps growing and I don't think the island is doing enough to accommodate the people"

"So many people are moving to Jersey to start a family...it's safe here"

Recognition that Jersey's economic success has been based on immigration



Many respondents spontaneously recalled the economic success immigration has brought Jersey, particularly in sectors such as hospitality, agriculture and finance.

Recognition that people are coming into Jersey and filling jobs that islanders don't want to do or are bringing in an expertise.

Some respondents concerned with a population policy that limits immigration, with these jobs needing to be filled and many struggling to be currently.

Many like the cultural diversity on the Island with younger respondents (18-30) wanting the Island to be more multicultural and inclusive.

"I like the cultural diversity here"

"You need seasonal workers for hospitality, agriculture, we need it as Jersey's a holiday island"

"People from different cultures come and do the jobs people over here don't want"

"Worried if they cut down on immigration that would be my concern on population policy. We are already struggling in those areas"

"Not enough Jersey beans want to do jobs like farming or bar work so we need these people"

Housing and education identified as the main issues with a current lack of population policy

Most mentions

Main issues....



Housing affordability and availability

"Quality of housing is poor, reasons people can't buy their own properties is because they're spending so much of their wages on rent"

Lack of education with schools becoming full

"Extremely difficult for young people coming back from university to find somewhere to live that's affordable"

Environmental damage and loss of green spaces



"Facilities can't cope, we see this first hand in schools we don't have enough for all children"

Infrastructure can't cope

"Government can wipe out green space. In next 30 years most of St Brelades Bay will be gone"

Traffic getting worse



"The roads are struggling to cope with the amount of cars"

"Traffic as well, seen a big change since I was a kid, it's so much worse"

Concern over housing for younger islanders, with many favouring the implementation of housing support schemes



The majority expressed concern around housing issues with a current lack of population policy.

Many felt young islanders will struggle to find affordable housing and won't return to the Island due to the cost of living being too high.

Some mentioned the low availability of housing due to investors buying properties for investment, 'lock and leave'.

"Waterfront flats 70% of those flats are empty due to lock and leave"

"Young people that find somewhere to live will likely have had help from their parents"

"If I want to come back after University I can't afford to live here" (Age 20)

"I can buy a three bedroom house in the UK, probably with a decent garden, for the same price or less than a one bedroom flat over here" (Age 22)

Respondents highlighted the need for housing affordability schemes to be available for young people.

Many suggested housing support systems such as the first time buyer scheme, or offering lower interest on money borrowed for first house deposits.

High recognition that housing support will help keep young people/talent on Island.



"Bank don't lend enough to get a house"

"First time buyers need way more financial support, help and advice"

"Both my sisters did engineering and would love to come here but the cost of housing is too much"

Environment highly important and valued by most



Overall, respondents placed high importance on the environment in Jersey, mentioning the value of open fields, cliff paths and beaches. The majority of those not born in Jersey labelled the environment as their main attraction for moving/living here.

Many expressed concern for the loss of green space due to the building of infrastructure and housing to accommodate for increasing population numbers. Several mentioned how they don't want Jersey to end like 'Hong Kong' or other built up countries.

Some worried about the environmental harm caused by the high volume of petrol vehicles on the Island.



"Losing our green space, jokingly say we are going to end up like Hong Kong but that's the reality of it if we carry on"

"20 years ago would have said it's just a field build on it but now my mindset has changed. The reason I moved here was for the green space"

"Most attractive reason for living here is the environment, need population control to keep that attraction"

"From a consumerism point of view and waste per person with an increasing population there is going to be further strain on the environment"

Concerns about future **quality of life** for children and grandchildren



- Many worried about the future quality of life for their children and grandchildren if important facilities including schools, hospitals and workplaces become overcrowded and difficult to access.
- A few mentioned current educational issues, with parents unable to get a place for their children in some schools due to classes being full.
- Some concerned of the negative impacts an increased population will have on the communal divide between the 'rich' and 'poor'.
- Many expressed how young people aren't going to be able to stay on the Island or come back after leaving due to the low affordability and availability of housing.
- Those aged 18-30 highlighted the appeal of Jersey as a safe place to start a family, however expressed that if the quality of life diminishes they will be unlikely to come back to the Island.

"I want my children to get access to healthcare, schools/workplaces and them not be over crowded"

"Increased population will increase the divide between educational systems in school (state school vs private), will be a real communal divide"

"The classes are getting full and children aren't always getting the attention they need"

"We all say were going to come back but if the greenery is gone, the beaches are packed, houses are unaffordable we're not going to" (Age 20)

"The more people in the island the quality of life is diminishing"

Hospitality and agriculture jobs not being filled viewed one of the main issues with a future population policy



- Majority of respondents concerned that the introduction of a population policy will mean important jobs in hospitality, labour and agriculture won't be filled by locals.
- Many mentioned how young islanders are only encouraged in school to go to university or into finance jobs, with the expectation of lower paid work in sectors such as hospitality and agriculture. This issue was emphasised in the **18-30** year old group with many having left school only a few years ago.
- Some recognised there's not enough skilled workers on the Island and that a future population policy will need to bring these workers unless locals had more opportunities to be trained and upskilled.
- Few respondents were worried about the fairness of a future population policy, and how it would be decided who would be allowed into the Island.

"Needs to be truly fair and not just cater for those that can afford to come in and pay millions of pounds for houses"

"Going to have to bring in people with these skills as we won't have them on island"

"At school I was only encouraged to go into finance or off to university. They don't encourage you to get into labour jobs or hospitality etc"
(Age 20)"

"I wouldn't send my children to any of the schools here now because they just take you down one route"
(Age, 22)

Call for more investment in education and career opportunities



“Make Highlands cutting edge, update the courses”

Education

Actions the government should take...

Points-based system

- Government to invest more in educational opportunities and upskilling islanders to reduce dependence on importing skilled workers.
- Need schools to educate young people of alternate career paths opposed to a focus on finance and off-island university.

“Promoting jobs to children at young age, jobs such as farming to give them that momentum”

“Young people going into finance, there is a need to bring people in to do jobs such as labour jobs”

- Many suggested the implementation of a points-based system or Visa approach as used in Australia.
- Focus on bringing people in with the necessary skills the island needs.
- Mention how there needs to be some control and tightening of borders like New Zealand and Switzerland.

“We need skills to contribute to the point system”

Work experience/training

- Focus on improving training schemes and offering work experience across the board.
- High expectation that technology will make a difference in finance/agriculture.
- Encourage a range of industries to offer placement schemes and work opportunities to encourage young islanders to come back to the Island.

“Placement schemes across different industries could be sponsored by government to encourage young people to come back”

“Need to get employers on board to train/hire on island”

Sustainable Transport

- Mention of the need for a sustainable transport scheme to limit the high numbers of vehicles on the roads.
- Some felt there should be an incentive offered to switch from petrol/diesel to electric cars.

“If you taxed those large vehicles people would sell them which is better for the environment”

Young islanders to be given more of a voice in decision making on a future population policy



Actions the government should take...

Strengthening the identity of Jersey

- Respondents particularly in the 18-30 year old group felt Jersey could have a stronger identity that is more welcoming.
- Some thought that strengthening the community in Jersey will make young islanders more likely to stay on island or return.

"There's no real strong Jersey identity, Jersey beans aren't very welcoming"
(Age,26)

"Older people hold more power..may not be best representation of young people's views"

"Strengthening the community so that younger people stay here"

Maintain green spaces

- The majority highlighted the importance in caring for the environment and maintaining green spaces.
- Many felt the environment should be a priority and that the building of new infrastructure should be restrained in large green spaces.

"It's important that they (government) ensure green areas are kept and looked after"

Involving younger generation in decision making

- Many felt the younger generation should be involved in decision making on a future population policy as they will be affected most by it.
- Some felt the young people's views currently poorly represented in States decision making.

"Younger generation need to be involved, give them a voice"

Housing support

- Affordable housing for young people to come back to the Island and contribute to the economy.
- Housing support schemes such as the 'first time buyers' scheme and help with deposits.

Younger respondents more tolerant of an Island that's **multicultural and promotes inclusivity**



- All respondents in the **18-30** year old group expressed the need for Jersey to become a more inclusive and diverse community.
- They mentioned how Jersey is very set minded compared to places they have visited/been for university. One mentioned how there was only one person of different a race in his school.
- Some suggested educating children at a young age to be accepting of individuals of all races and ethnicities. One respondent expressed how her Thai half sister felt there was something wrong with her because she was different to everyone in her class.
- Mention how being inclusive will add to the appeal of Jersey as a place for young people to live and start a family.

"At uni you realise there such a diverse range of people, I do think there's a need for inclusivity"

"Inclusivity starts with education at a young age"

"People are very set minded here. I think it's good to have cultures coming into Jersey"

"My sister who's Thai asked me what's wrong with her because she's different"

"Inclusivity adds to the appeal of living somewhere and raising children as you want them to be happy and accepted"

Starting a family and a better quality of life perceived as the main reasons for young people to return to Jersey

Reasons for wanting to return to Jersey...



"A prime example I think of is my family member who left Jersey at 18 and came back to start a family at 29"

"Want to come back after you have kids because you have the money then and it's safe"

"I like the little bubble of Jersey and wouldn't want to leave"

"People come to Jersey to start a family because they don't want to live in a city they want that green land"

"We want to return for the beaches, cliff paths and green spaces"

"Most attractive reason for living here is the environment, need population control to keep that attraction"

- Younger respondents aged **18-30** perceived wanting to start a family a main reason for returning to Jersey, with the island viewed a safer place.
- Many expressed how the quality of life is better in Jersey and how it's an 'attractive' place to live.
- Maintaining the environment was considered very important to younger respondents, who want to return to the beaches, cliff paths and green spaces.
- Some mentioned they will only be able to return to the Island when they are older and can afford to live here with a family.
- Those who weren't born in Jersey or have lived in other countries felt they were more likely to return as they have experienced living off-island.

"Because I lived somewhere else and then lived here I didn't feel the need to go away. Might have been different if I had grown up here"

"I don't think it's busy because I have been in over 60 countries, it's still the smallest and most peaceful place I have been personally"

Cost of living and lack of career opportunities perceived as the main reasons for young people to **not return to Jersey**



Reasons for **not** returning to Jersey...

- Younger respondents aged **18-30** felt the high cost of living was a main reason for not returning to Jersey. Some felt unless you work in finance you will struggle to live here.
- In particular, many expressed that houses in Jersey are a lot more expensive than in the UK, and that it's extremely difficult to find houses that are affordable.
- The majority recognised there isn't as many training/job opportunities in Jersey for certain careers young islanders want to pursue.
- Many mentioned the need for off-island life experience and the desire to view different places around the world.
- Some respondents felt after living independently at university they wouldn't want to come back to Jersey and live with their parents.

"If you're not in finance you will struggle to come back to Jersey because its a more expensive lifestyle"

"I want to have a career in television and radio and there's not training and job opportunities in Jersey"

"Depends on your career..unless you go and study finance or say business it's going to be hard to get a job here"

"The cost of living in Jersey, once you get a taste of living at uni you don't want to come back and live with your parents"

"Housing a lot more expensive and I can't train (for career) over here"

"Both my sisters that did engineering and would love to come here but they wouldn't get jobs"

"You need off-island experience"

"People go to explore the world because there's funner places to spend in your 20's and Jersey's very different compared to lots of places"

Acceptance that a successful population policy is **not going to be a number** but needs to be fair



Overall, the majority of respondents perceived that a future population policy is not a capped number but more a system such as a points-based system or Visa approach.

Strong awareness throughout all groups that a successful population policy needs to support the economy and develop young people. Many mentioned this can be achieved by providing more opportunities for people to be upskilled to avoid having to always import skilled workers.

Most recognised the need to promote a range of jobs to young people opposed to a focus on finance, and for work experience/training schemes to be offered across a broader range of industries.

Some felt that young islanders should be involved in decision making regarding a future population policy by giving them a voice and listening to them.

Many expressed that sustainable transport schemes need to be implemented alongside a population policy and to keep the environment as a primary focus.

A successful population policy was perceived as one being fair and promoting equality.

"People coming in need to be treated equally. It's not a fair system over here"

"Only bring into the Island the people with skills that are actually needed "

"Make it easier for people to live here- take off work licenses and housing licenses"

*"Like the Australian point system, something like that but more lenient"
(Age 20)*

Environment, Economy and Community perceived all important

The environment, economy and community were all valued by most and perceived needing to be balanced with it being difficult to prioritise one element over another.

“Interlocking elements, all are important”

“They all feed (into each other) you can’t have it separate”



When discussing how important these factors were in the groups, the majority agreed they are interlinked and can't be separated.

“The Environment should be top ...that’s what’s special about Jersey”

“In Jersey economy and money is put over everything else”

“You need the economy to be stable to invest in the environment and community”

“It’s hard to place any last but for me not living here long community has to be ”

Respondents born in Jersey were slightly more likely to rate the **environment first** compared to those not born in Jersey who were slightly more likely to rate the **economy first**.

Younger respondents (18-30) perceived the environment to be of the highest importance.

Many respondents prepared to **pay more tax and work past current retirement age** if inward migration was relied on less



- Many stated they would be prepared to pay more tax if inward migration was to be relied on less, however they would want to know exactly where this money is going.
- Lots of scepticism around how the additional tax revenue would be spent by the Government and the need for better efficiencies.
- Many mentioned they would be willing to work past the current retirement age, with some already working past this age or planning to do so.
- Some suggested taxing high-earners and large corporations. Mixed awareness and knowledge of zero/10 and corporations that pay tax and don't, with some thinking finance pay 0%. A couple mentioned the G7 meeting and how corporations should pay 15% tax.
- A few mentions of taxing larger vehicles or families with more than one car.
- Majority were not prepared to be offered a smaller range of publicly funded services.
- Some concerned with paying more tax and how this will be made fair relative to the income people earn.



"People wouldn't mind paying a bit extra if they can see if not being wasted. We don't have the best track record when it comes to spending money"

"Have a system that says your going to pay this amount of tax and this is where it's going towards"

"Tax the high earners and the large corporations"

"If you tax the big players more they will just leave the island"

"So many people need publicly funded services this is not the one to reduce"

Trade offs islanders are prepared to make

"I would pay more tax if I knew it was going to be used well and I knew exactly what it would be paying for."

"Happily do anything as long as they use it and don't hide it like they usually do".

"I wouldn't pay more tax, I would just move off Island".

"Definitely don't think reducing public services because needed for so many reasons. I would pay more tax but would need to cater for the wage divide." (Age 24)

"People would like the option to work past retirement age...many do already".

"I don't mind working longer, I plan to retire at around 70".

"Limiting cars...massive cars should be taken off the roads or taxed way more. "

"Working past the current retirement age shouldn't be a trade off it should be a choice".

"Waste collection could do only once a month."

"I would pay more tax to keep the beaches and the cliff paths, we don't want Jersey to turn into a Hong Kong."

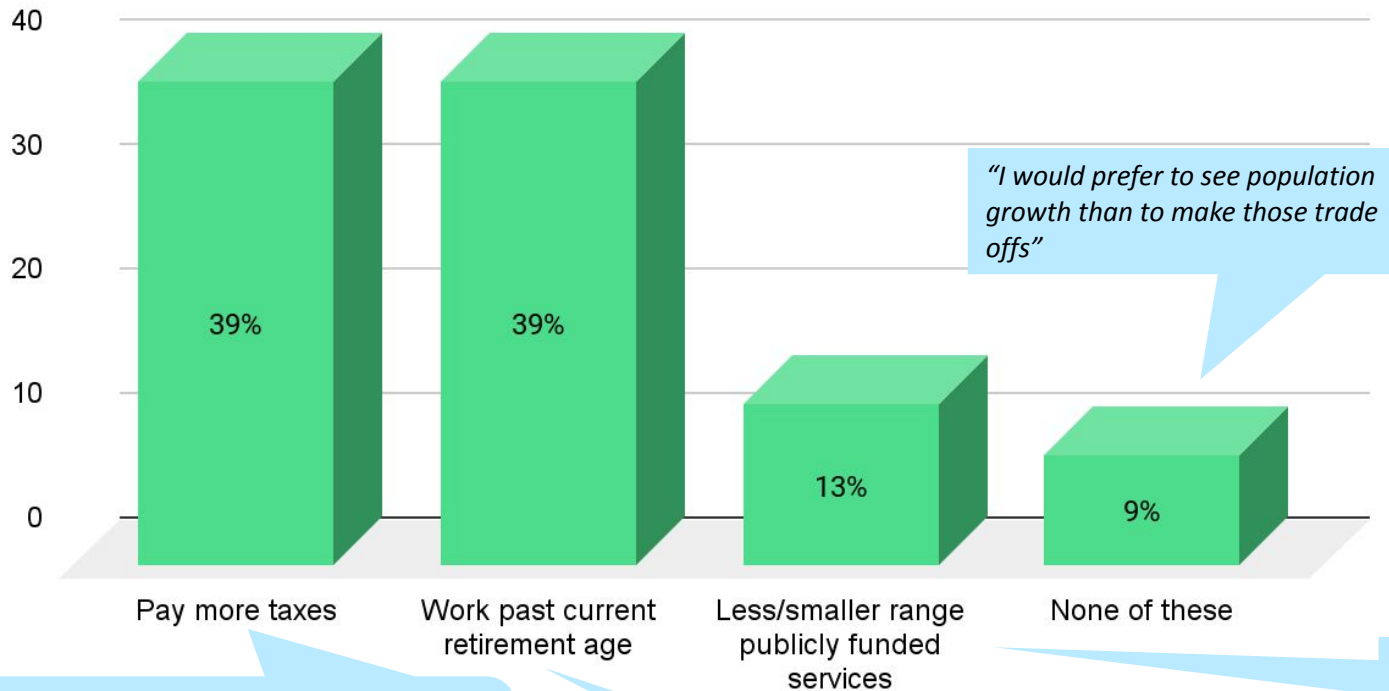
"One car per family".

"I don't want to work longer or pay more tax."



Reduced publicly funded services least popular trade off

Please tick your choice of acceptable trade offs if inward migration is strictly controlled and reliance on inward migration reduced. Can multi tick



"I would prefer to see population growth than to make those trade offs"

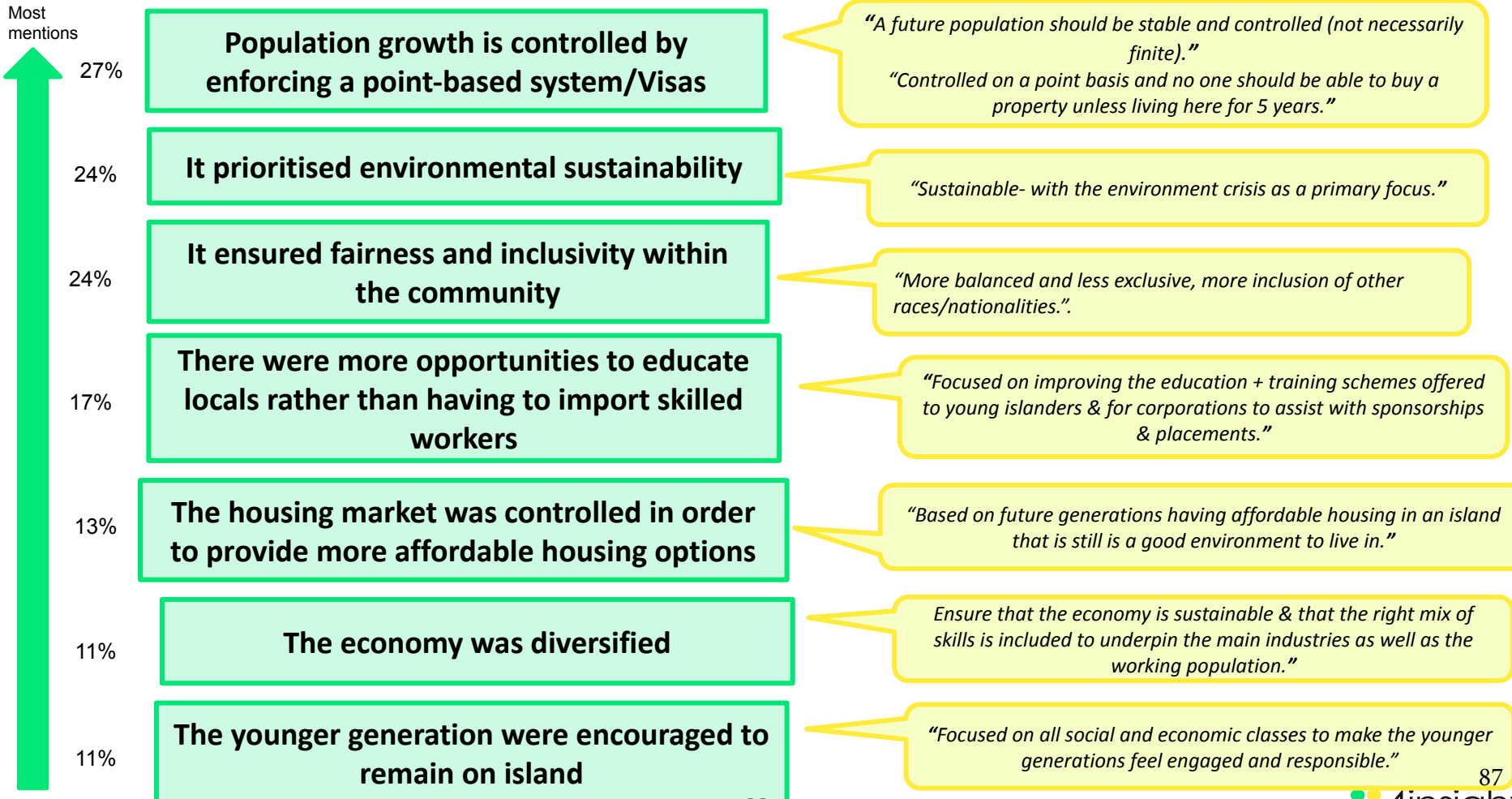
All the young respondents, 9, (aged 18-30) were willing to pay more taxes.
90% of respondents aged 18-30 were willing to work past the current retirement age.

"I would be comfortable being taxed more if the reduction in immigration was done for the right reasons, i.e not just the poorest workers excluded"

"Hard to know as we are just starting our careers if in 40 years time we will want to be working still" (Age 24)

"We are already offered a small range of publicly funded services"

Our future population policy would be so much better if.....



Most mentions



n=38

26

87

Additional Comments

"Less people being brought in to the island to "run" the island, i.e civil servants"

"Education and equal wage in all areas of the economy"

"Contribution to society (skills/economy)- taken into consideration for point system"

*"Filters can be applied on bringing more skilled labour rather than unskilled.
Fair policies for all so that locals don't exploit social security by not working and having more children."*

"Do not trade off diversity/community"

"Tax policy should look for other options besides personal taxes."

"In regards to paying more taxes it needs to be fair for everyone and taken into consideration the different lifestyle on the island and the wage gap that does exist. No point raising tax if people can't afford to live, i.e pay rent."

"Attract new service/industry sectors that add to income tax take but not at the cost of increasing population/use of the finite resources in the Island"

"Developing a policy that tries to cap the population is unlikely to succeed. Must be considered in conjunction with transport & environment policy"

"Would like to see a point system or visa system if viable"

"Housing needs looking at"

"Tax the rich and the corporations!"

"I am happy to pay more taxes if is spread fairly across whole community"

"Restricting people's ability to work and accomodation is a short sighted and ultimately doomed proposition"

"Tax the housing market-capital gains"

Key Takeaways

Key Takeaways

- Overall, Jersey's population perceived as 'too big' for the small size of the Island. Many respondents mentioned how the current facilities and infrastructure will be unable cope with a growing population.
- Housing affordability/availability was perceived a main issue with a current lack of population policy, with a need for housing support schemes to be implemented to help keep young people/talent on island.
- The environment was viewed as being highly important and valued by most, especially the young. Many concerned about the loss of green space and Jersey ending up like a 'Hong Kong'.
- Many worried about the future quality of life for their children and grandchildren if important facilities become overcrowded and difficult to access. Some mentioned the struggle in trying to get a place for children at schools with some classes being full.
- Hospitality and agriculture jobs not being filled viewed one of the main issues with a future population policy, compounded by schools having a focus on the finance industry and off-island universities.
- Recognition that there needs to be investment in training and career opportunities, as well as offering work experience/placements across a broader range of industries to upskill islanders and help reduce the dependency on importing skilled workers.
- Younger respondents in particular (18-30) felt the identity of Jersey could be strengthened as a more inclusive and diverse community.
- Many perceived that a successful population policy is not a number, more a system such as a points-based system or Visa approach similar to that in Australia. Importance placed on a population policy that is fair and promotes equality.
- Some expressed that sustainable transport schemes need to be implemented alongside a population policy.
- Many felt that young islanders should be involved in decision making by giving them a voice.
- The majority felt the environment, economy and community were equally important and can't be separated and need to be balanced.
- Most respondents willing to pay more tax (40%), and work past the current retirement age (40%), if inward migration was relied on less. Fewer were willing to be offered a less/smaller range of publicly funded services (13%).
- Those willing to pay more tax were sceptical of how this money would be spent and would want to know exactly where this money is going. Some suggested taxing high earners/large corporations more.

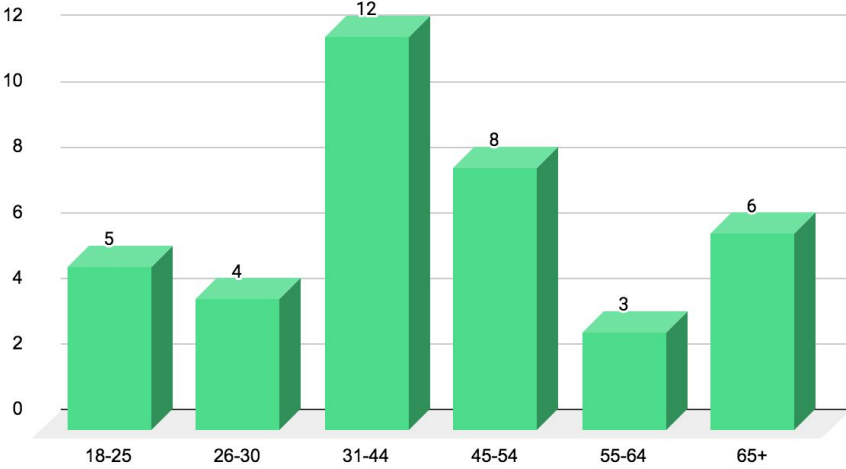
QUESTIONS



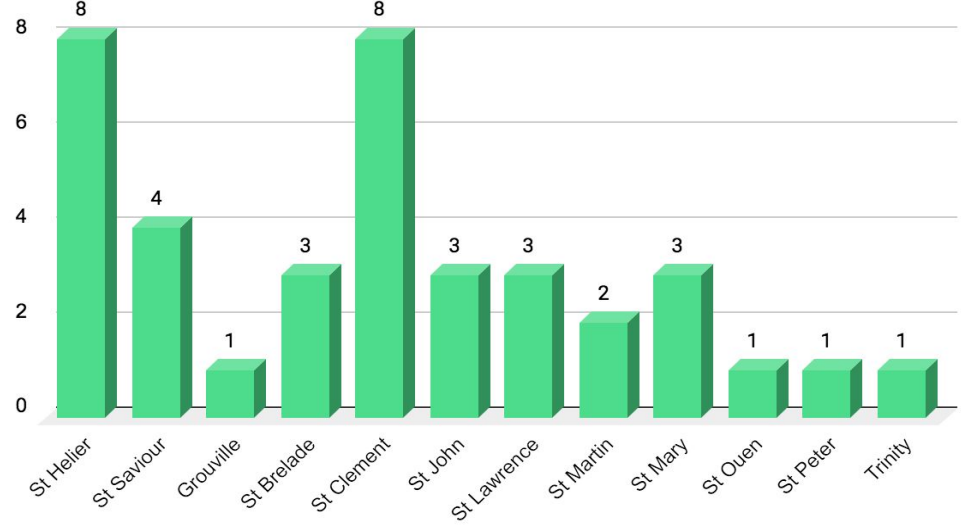
Appendix

Focus Group Demographics

Are you aged..?

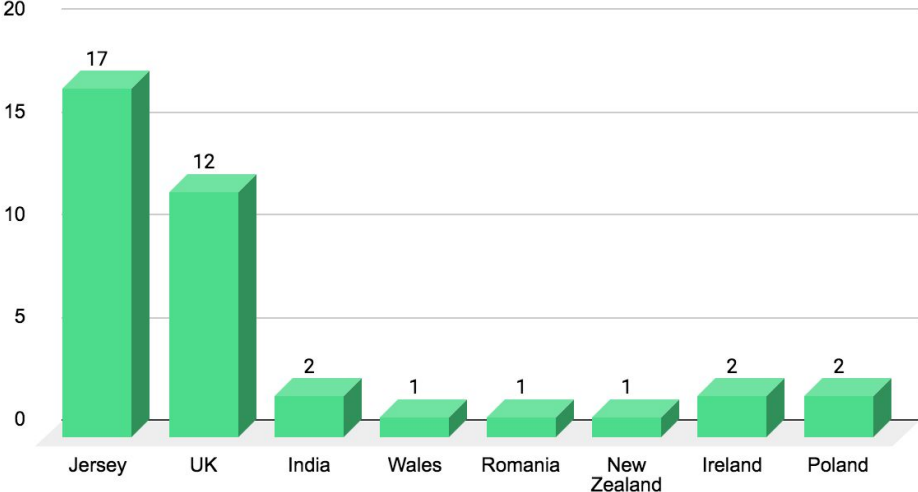


Which Parish do you live in?

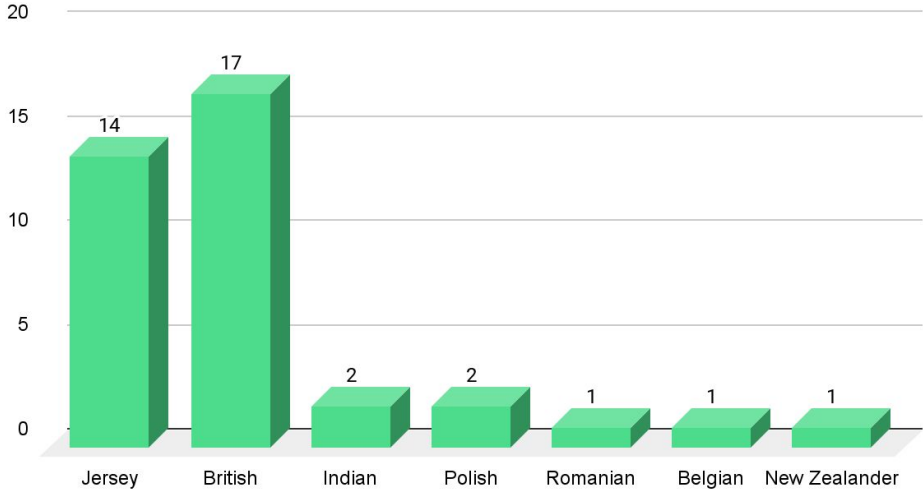


Focus Group Demographics

Where were you born?



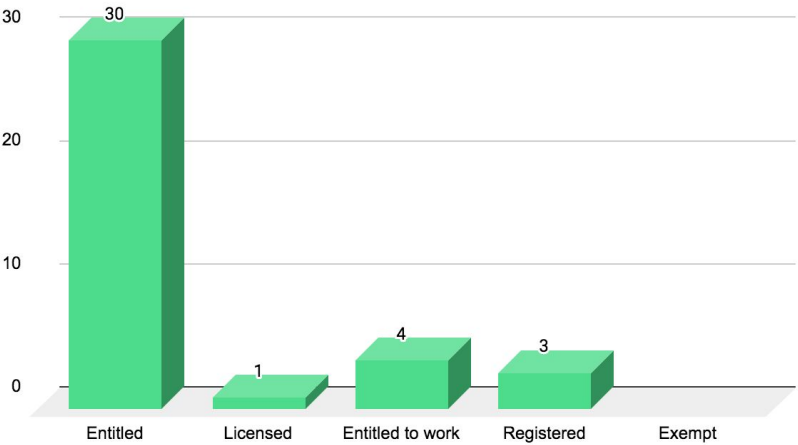
Which ethnicity do you identify as?



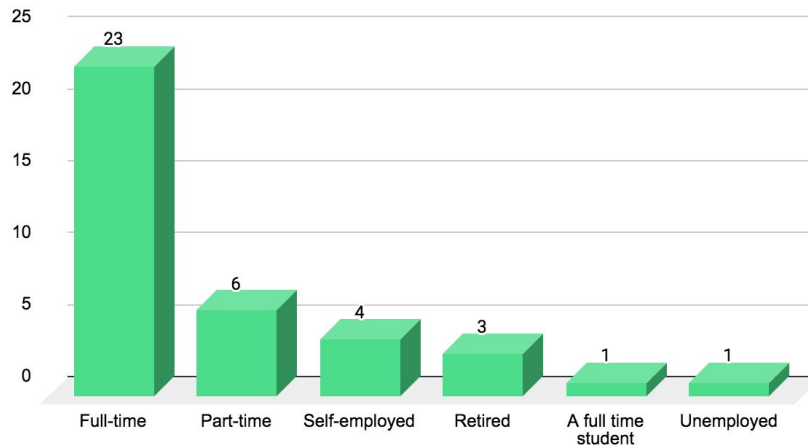
*We did have 3 Portuguese recruited but they didn't show

Focus Group Demographics

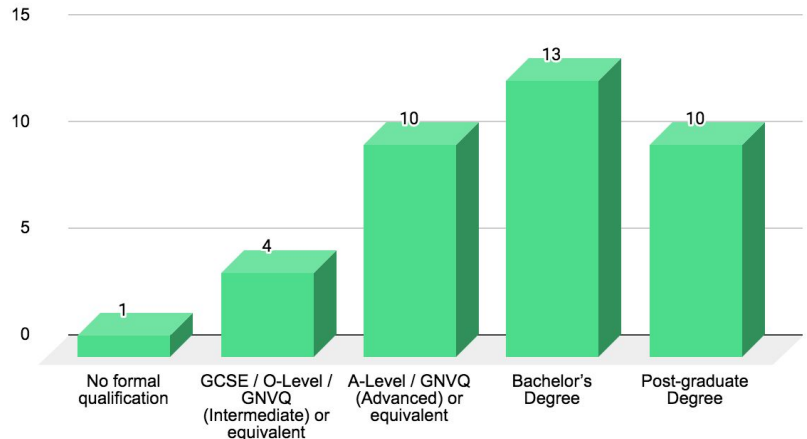
What is your residential status?



Are you...



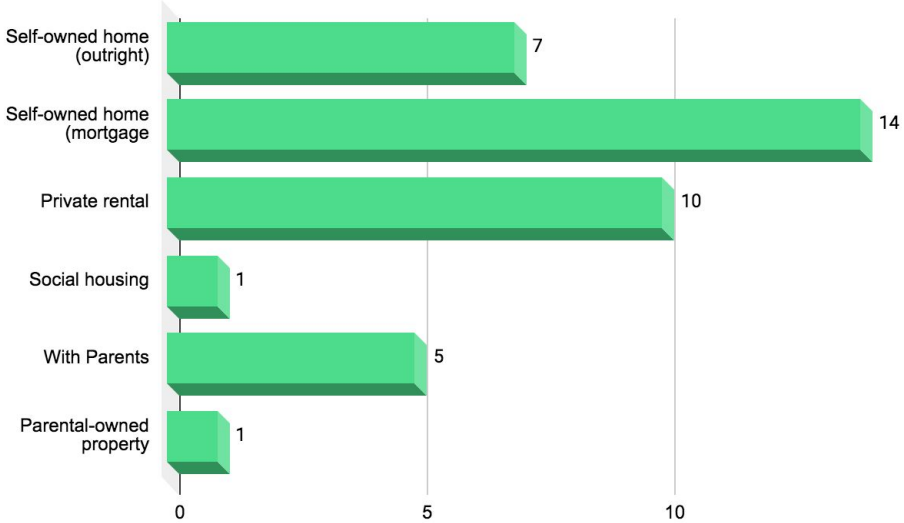
What is your highest educational qualification?



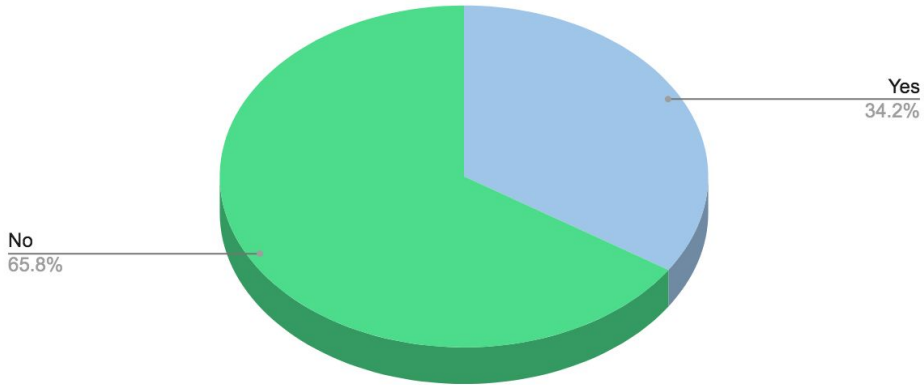
n=38

Focus Group Demographics

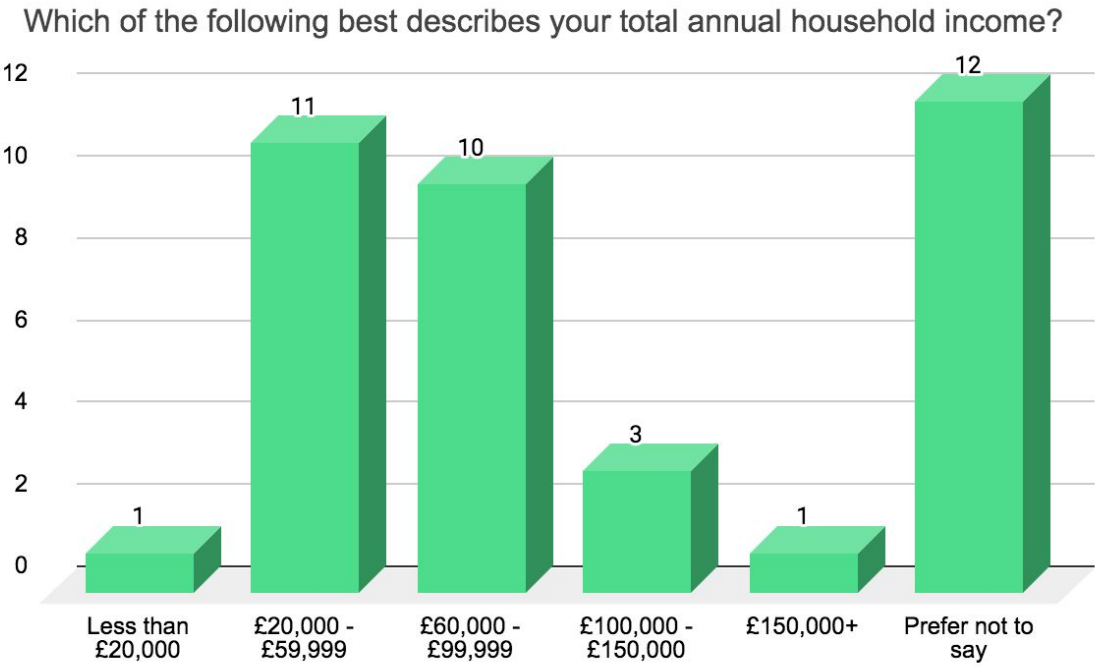
Do you live in...



Do you have dependent children living with you?



Focus Group Demographics



Our future population policy should be

Group 1

"Fair, considered, sustainable & takes into account the size of the island and its facilities"

"Sustainable to the islands environment, education and department of housing"

"To limit the amount of Jersey that is built on whilst enhancing green space in and out of town.

Reduction on high wealth business that take tax off island.

To allow payments to support population

Education for local population, i.e not brought in especially"

"Based on future generations having affordable housing in an island that is still is a good environment to live in."

"Holistic and realistic, measured, with equal opportunity for all, related to the environment and sustainable to the planet and island."

"Consistent against the needs of trainees versus the requirements of the residents i.e if we need more nurses to look after the population then we recruit locally or import."

"Controlled, point system, balanced & long-term political electors "

Our future population policy should be

"Ensure that the economy is sustainable & that the right mix of skills is included to underpin the main industries as well as the working population."

"Focused on improving the education + training schemes offered to young islanders & for corporations to assist with sponsorships & placements."

"Keeping our young here in Jersey, nice incentives and to help maintain our population and growth."

"Sustainable growth, both for population and infrastructure. Support for local talent/skills and help to get up the property ladder."

"One in with new entrance are measured as net tax contributions so that their wealth can be invested in services which benefit the whole of society, e.g schools, hospitals. For this to work employer/commerce need to get involved with sponsorship so that skills also be home grown as well as imported."

"Sustainable and achievable. Not have a negative impact on those already here or those who we need to come to enrich the island industries. Have only a small financial impact to those middle earners/ already paying their fair share, so as not to have a negative knock on effect."

"Cap the population, use a points based system Tax the rich and the corporations Cap benefits to 2 children."

Our future population policy should be

*“Fair to all whether local or immigrants
Charge less for naturalisation.
Make housing affordable.”*

*“Based on young people's' needs and experience of older generation.
We should maybe look into some other islands and their solutions, what works and what could work here.”*

“To involve all in the preceding recommended ways to deal with the issues, thats fair to all, that has the best interests of the community and the environment. ”

*“Focused on all social and economic classes to make the younger generations feel engaged and responsible.
Equality and fairness
Not just focussed on making the rich richer.
Affordable housing
Incentivisation-engagement
Opportunity, feeling part of a place ”*

*“Looking at the 'peripheral' issues as these directly affect it without appearing so-
- young people opportunities
- Investment in technology
- Environmental protection
- Fixing housing + tax.”*

*“Put people before money- environment needs looking after. Jersey is a wonderful Island keep it that way.
Make sure a healthy lifestyle is affordable. ”*

*“Build an educated population, create a safe community where voices are heard and represented.
Care for the environment. More things sustainable, shop small + local. The economy will then thrive. ”*

Our future population policy should be

*"Limiting population with visa/permit
Stopping the relentless unknown high intake
Altering the skills we need."*

*"Flexible
Prioritised based on skills + needs
Better population effects!
Long-term population effects!"*

*"Managed accordingly to retain the beautiful Island of Jersey. How is the million \$ question!
Points system/visas."*

"A future population should be stable and controlled (not necessarily finite)."

"Flexible and able to adapt quickly to changing needs of the island/economy."

Our future population policy should be

*“Sustainable!
Focused on positive
growth areas.”*

*“Pensions and visas for all, entry and
exit.
Effective succession planning in
States and other Jersey companies
Better management of incoming
population figures and jobs that
require licenses
Better work permitting.”*

*“Controlled on a point basis and no one
should be able to buy a property unless
living here for 5 years.”*

*“ Our future population should be: with
more opportunity to have a quality job.
Should be more interested in the
environment
Should be more adapted to change their
future
Should be younger, specialised and
happier.”*

*“Include letting for incomers,
focused on home-grown talent
development, control the housing
market, focused on the islands
needs and a net contribution whilst
not being elitist.”*

*“Linked to high value
productivity (per family
unit)
and associated tax take.”*

Our future population policy should be

Group 6

"Flexible workers age, limit children amount, more tourism."

*"Inclusive, built around the needs of the island.
Fair, & proportional- tax/ requirement for infrastructure.
Sustainable- with the environment crisis as a primary focus."*

*"Fair- it should take into consideration the gaps in our island in terms of skills work towards an equal space of both green and people.
Work towards diversifying our community and encourage people to stay on island and contribute to our island."*

*"Capped,
Encourage more diversity/inclusion
Consider the environment
Other ways to fund the economy which may also encourage diversity
Better housing options
Reconsider work/housing licences
Reduce overseas property investors
Cap buy-to-let properties
Increase job variety opportunities
Make it more affordable to live on island so people don't earn here and send money to another country."*

*"More balanced and less exclusive, more inclusion of other races/nationalities
Keep the island green- pay more tax."*

"Fair and inclusive for both 'Jersey Beans' and other communities."



1st Floor, 17 The Esplanade
St Helier, Jersey
JE2 3QA
Tel: +44 (0) 1534 859300
www.4insight.info

Population Survey Results

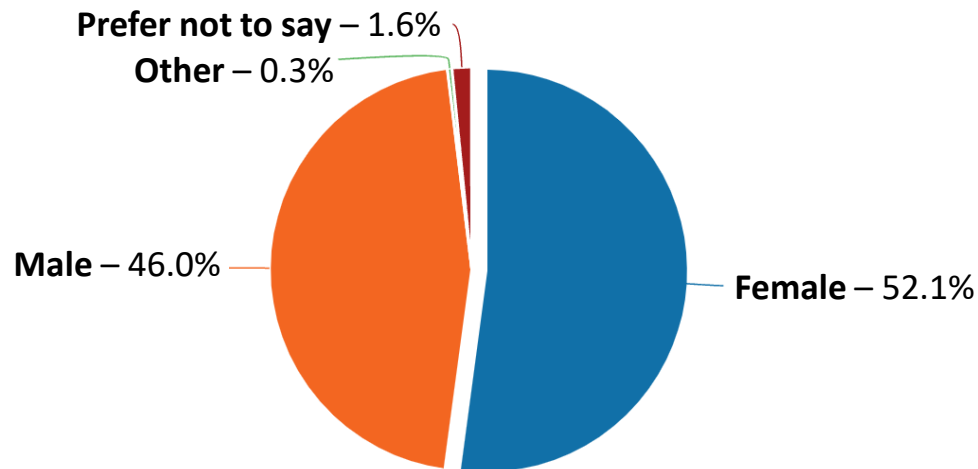
October 2021

Demographics

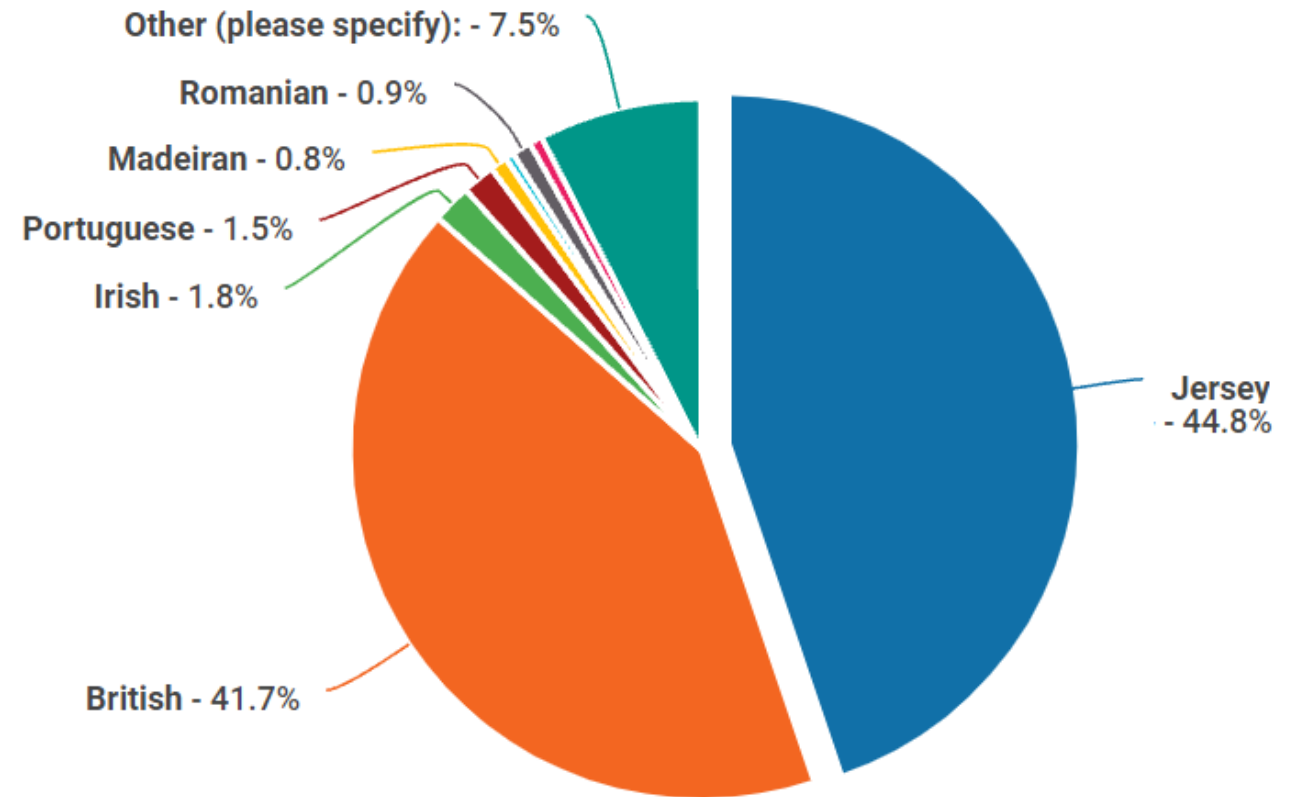


- There were 1,728 people who completed the survey
- 54% of survey respondents were born in Jersey, 46% were not

Gender

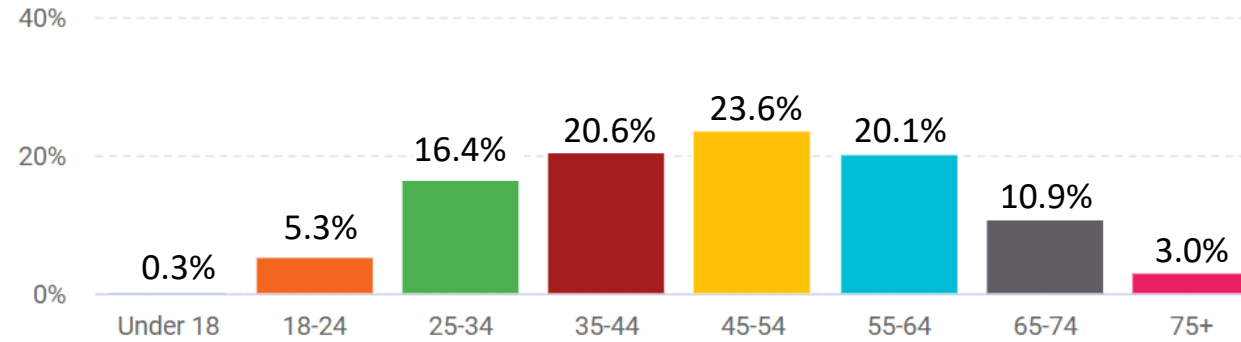


Nationality

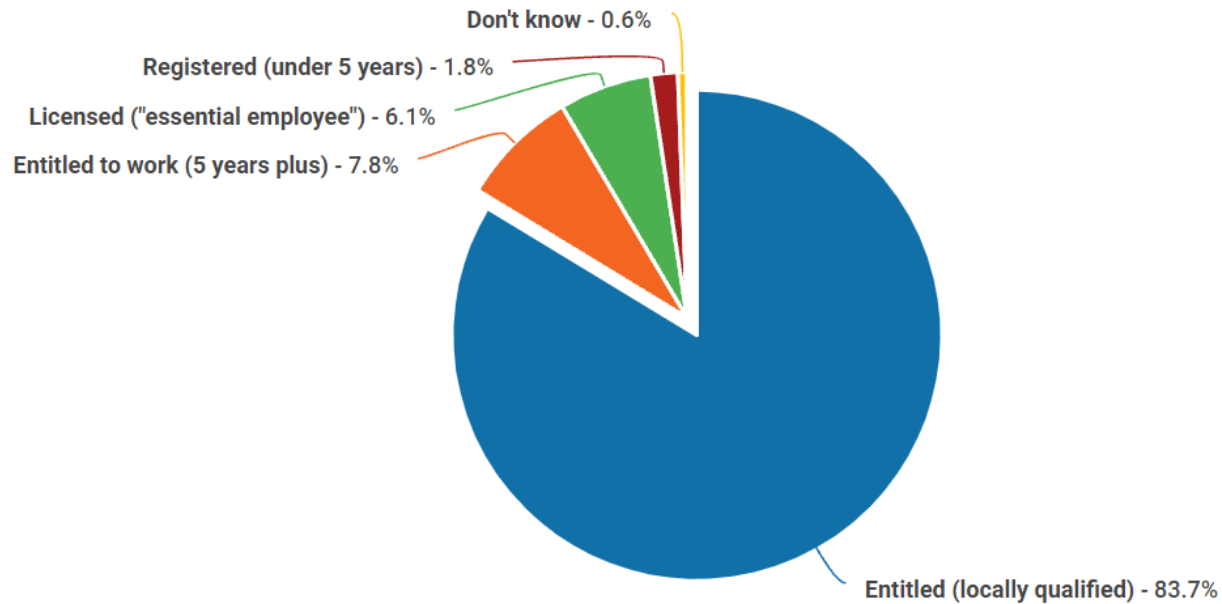




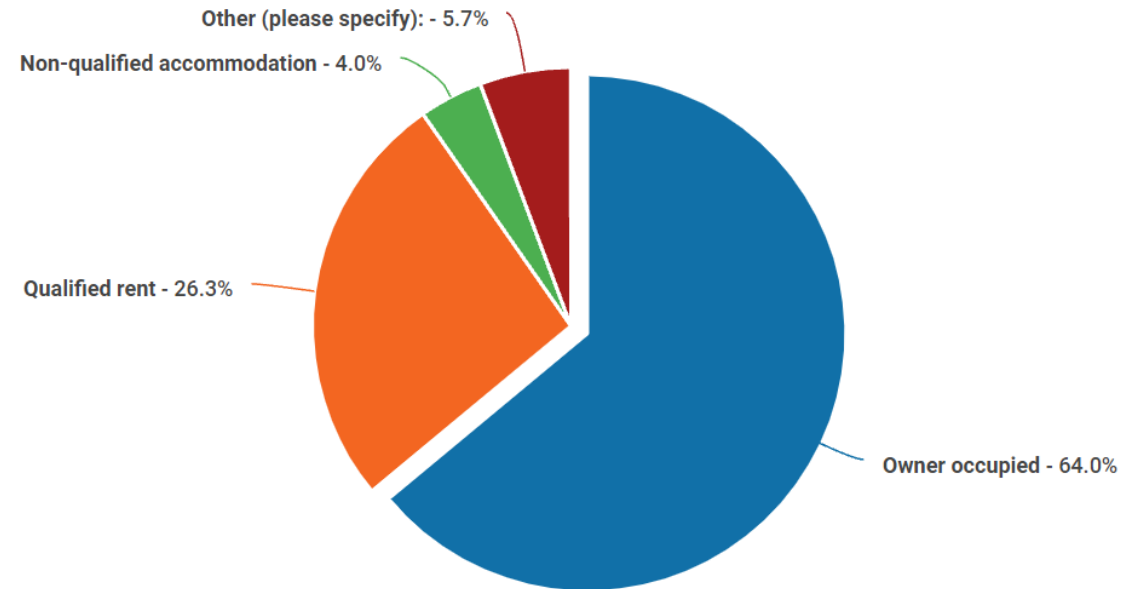
Age



Status for Housing and Work



Type of Accommodation

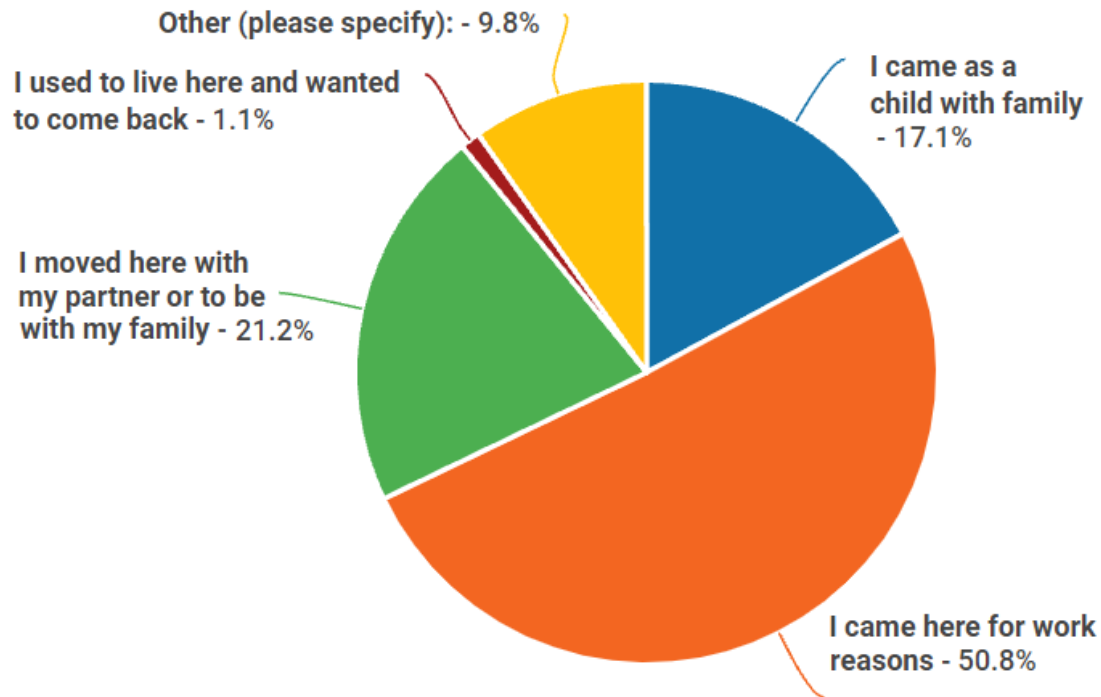


Non-Jersey Born

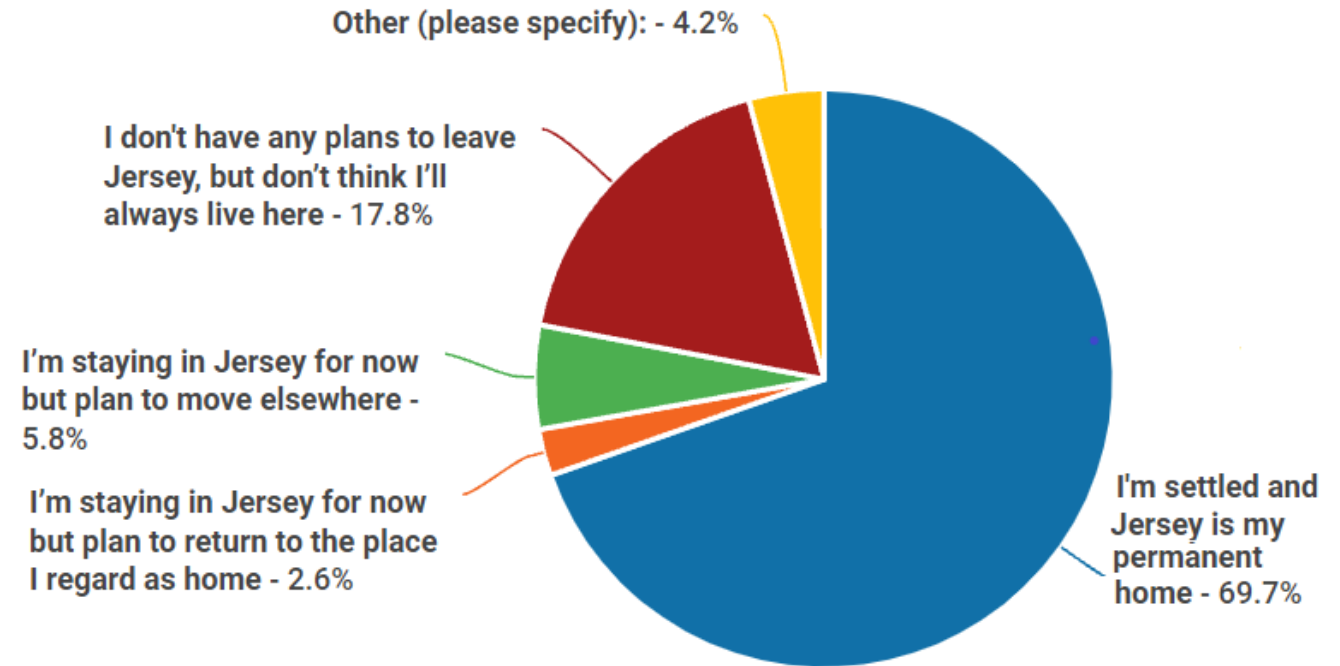
793 respondents



Reasons for Living in Jersey



Plans to Remain in Jersey

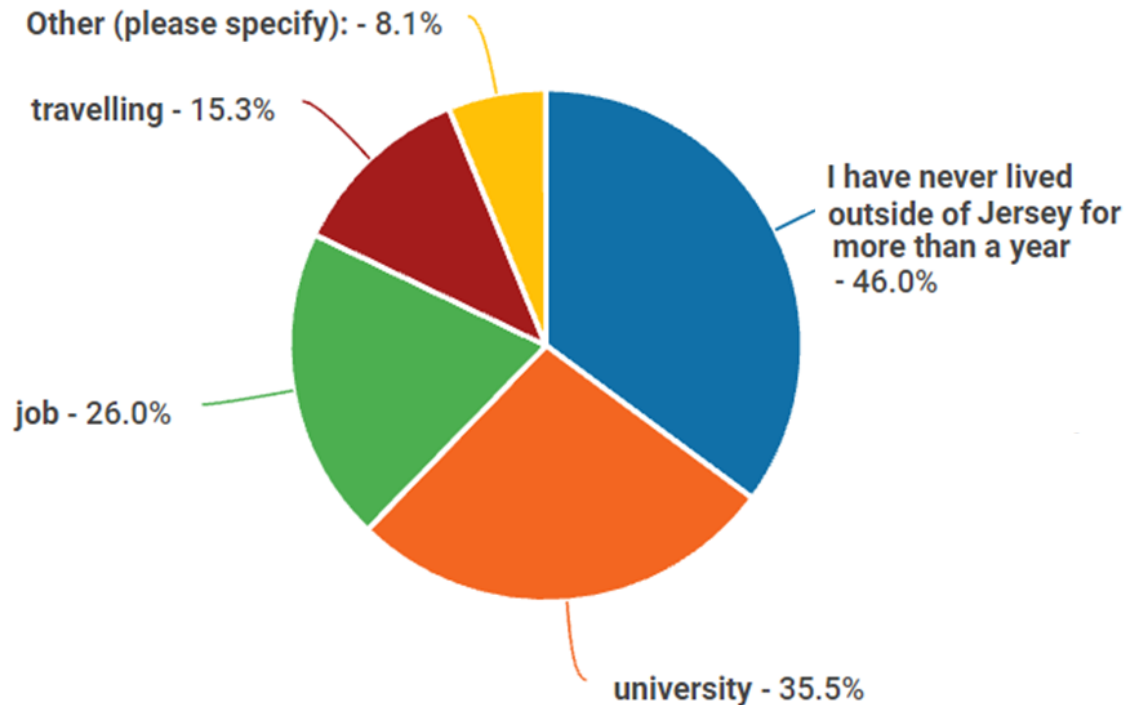


Jersey-Born

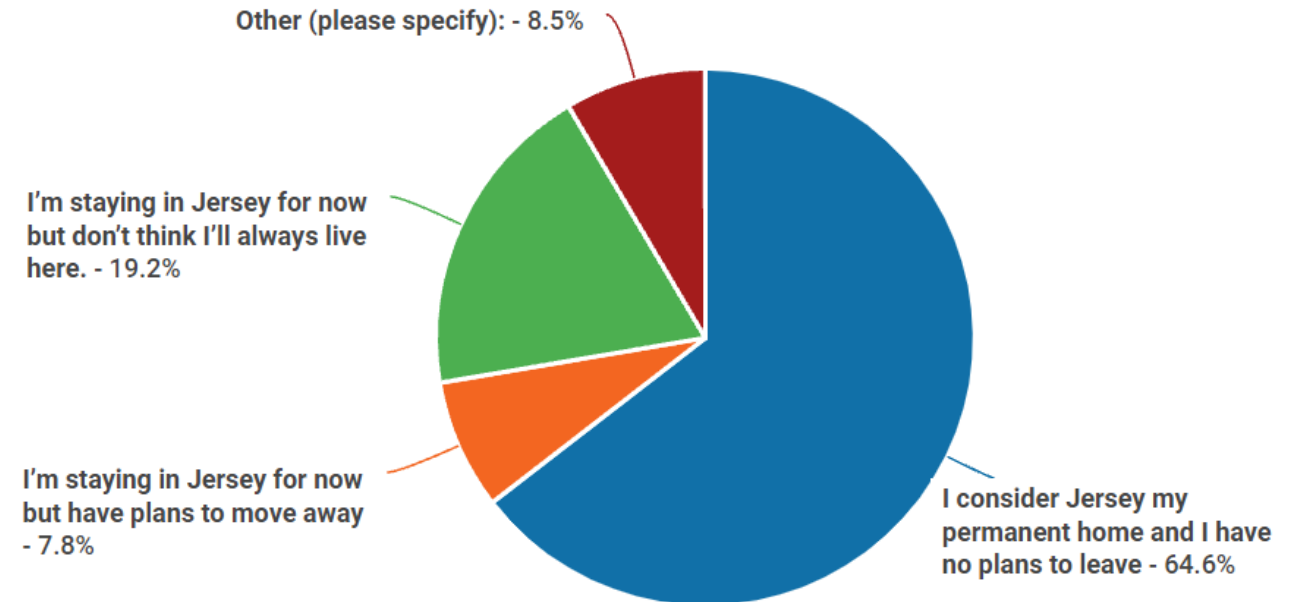
934 respondents



Reasons for Living Outside Jersey for 12 months or more

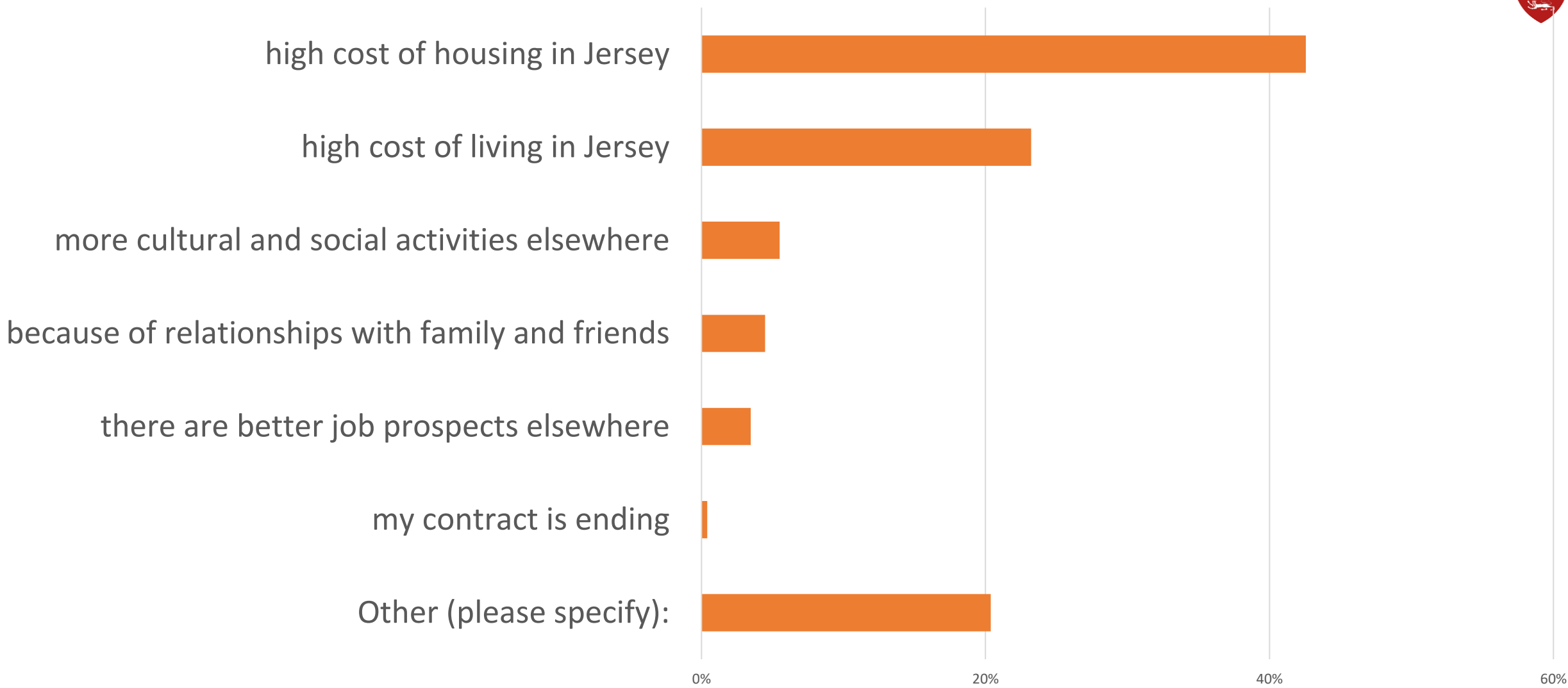


Plans to Remain in Jersey





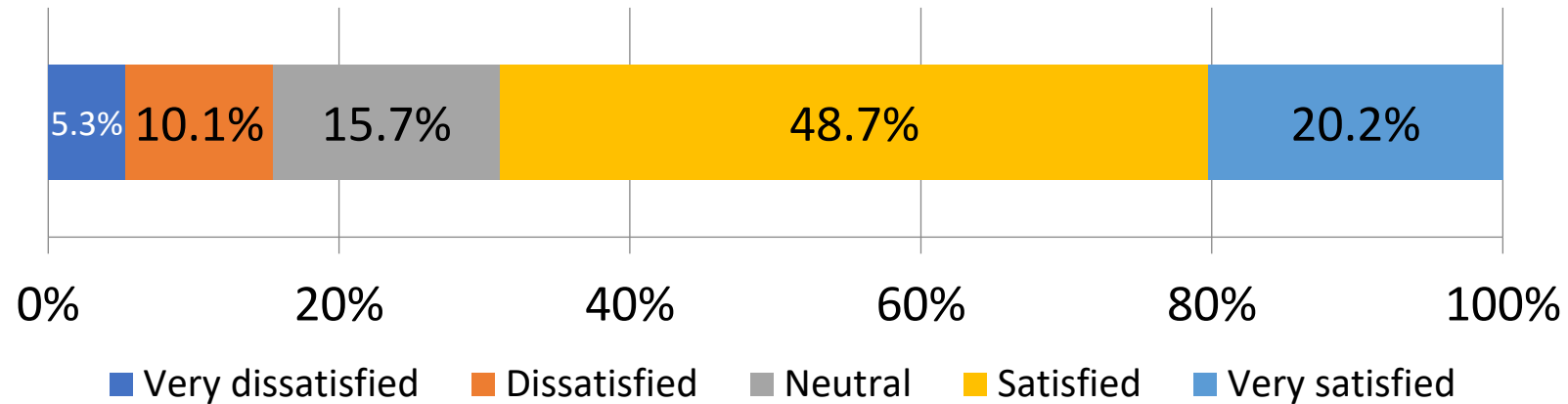
Reasons for leaving Jersey in the next 5 years – 491 responses



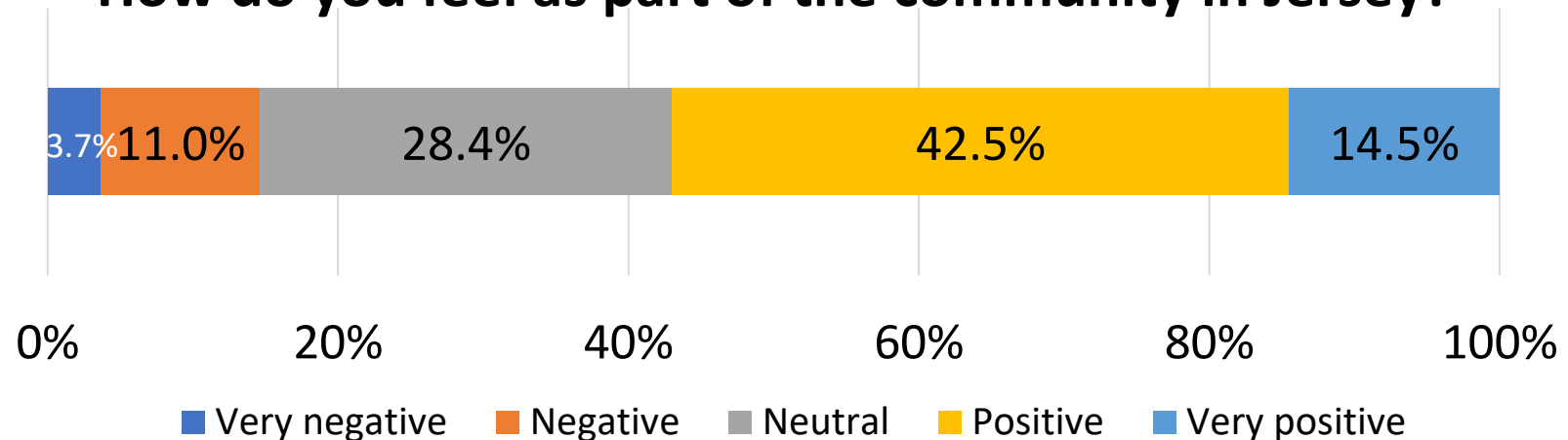
Satisfaction with life in Jersey (all respondents)



How much do you enjoy living in Jersey?

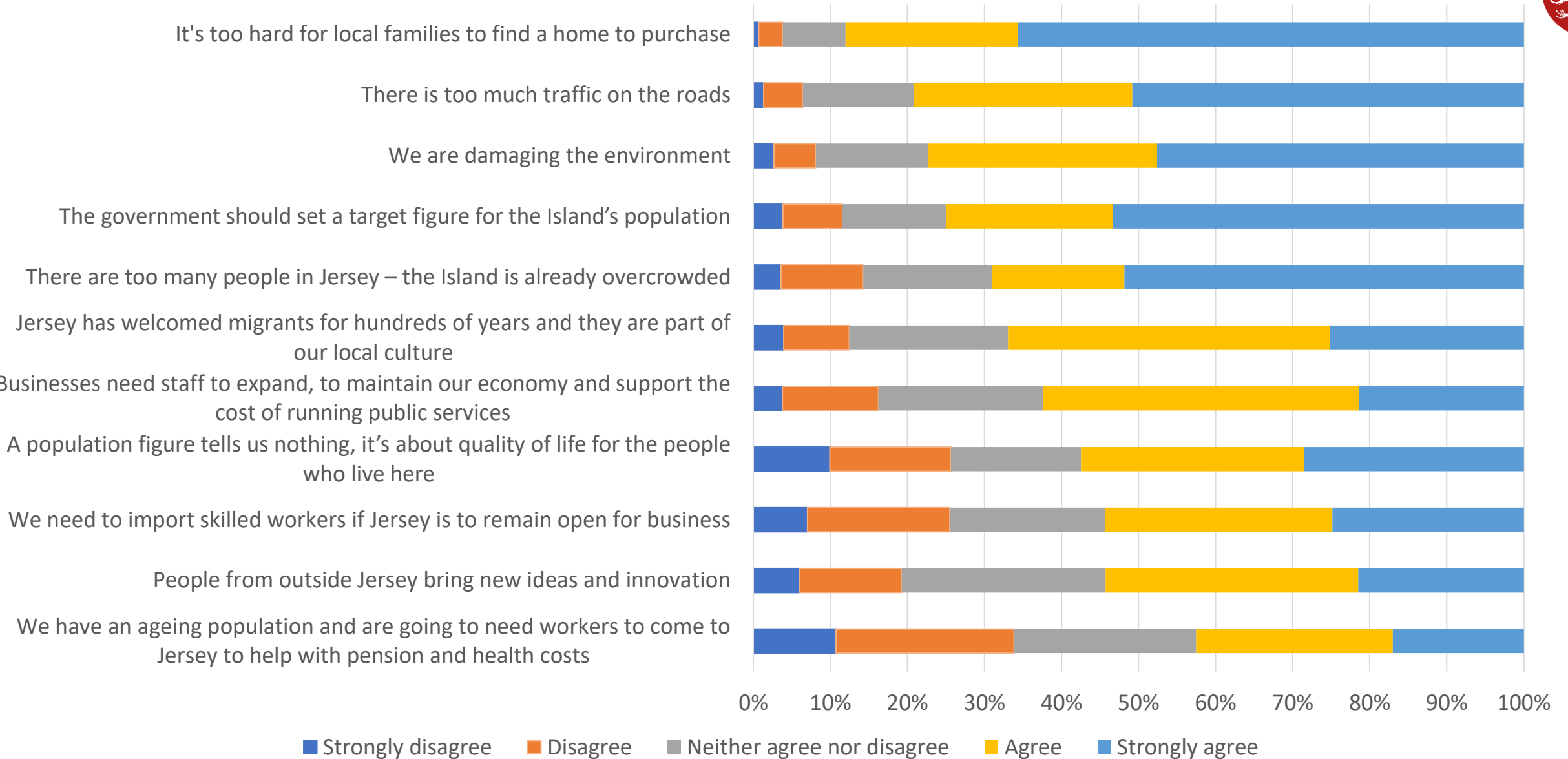


How do you feel as part of the community in Jersey?





Views on the impacts of a changing population (all respondents)

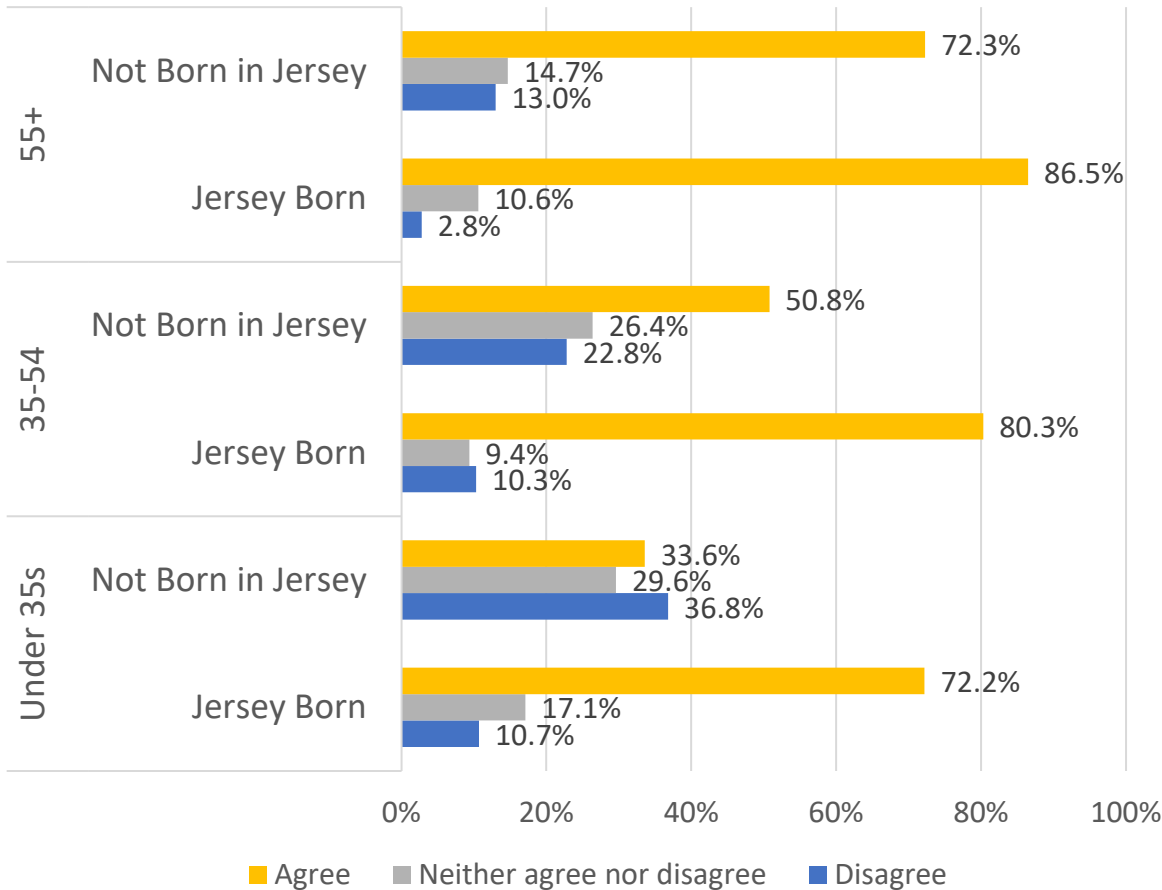


Views on the impacts of a changing population

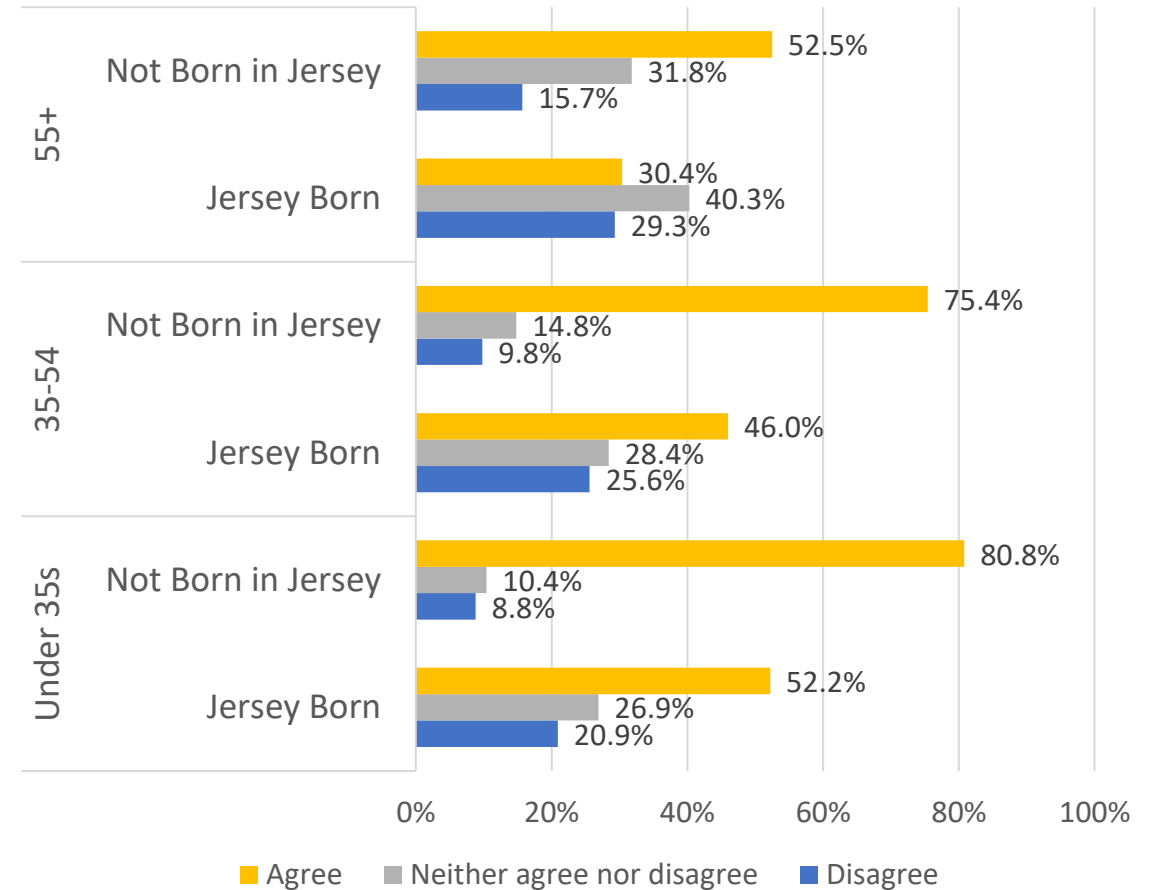
There were noticeable differences of opinion (at least 20 percentage points) between **age groups** **and** **those that were born in Jersey or not** on the following questions:



There are too many people in Jersey – the Island is already overcrowded



People from outside Jersey bring new ideas and innovation

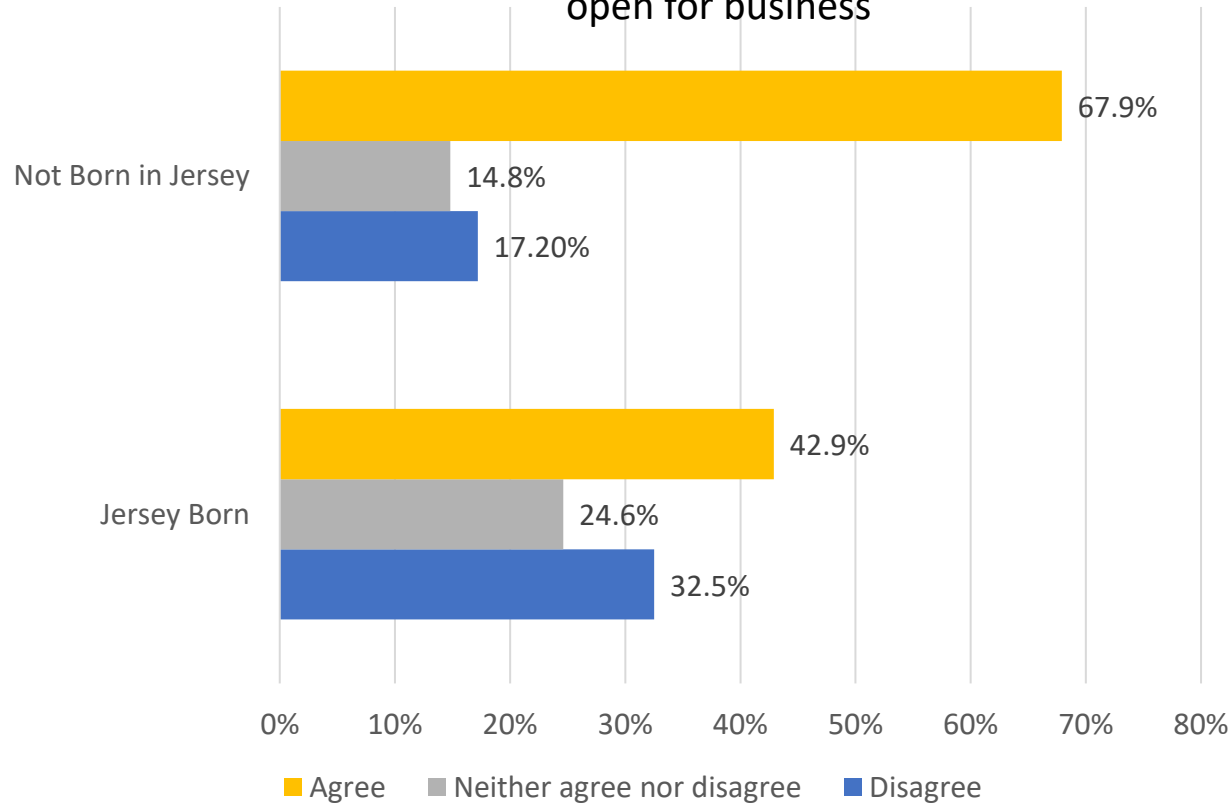


Views on the impacts of a changing population

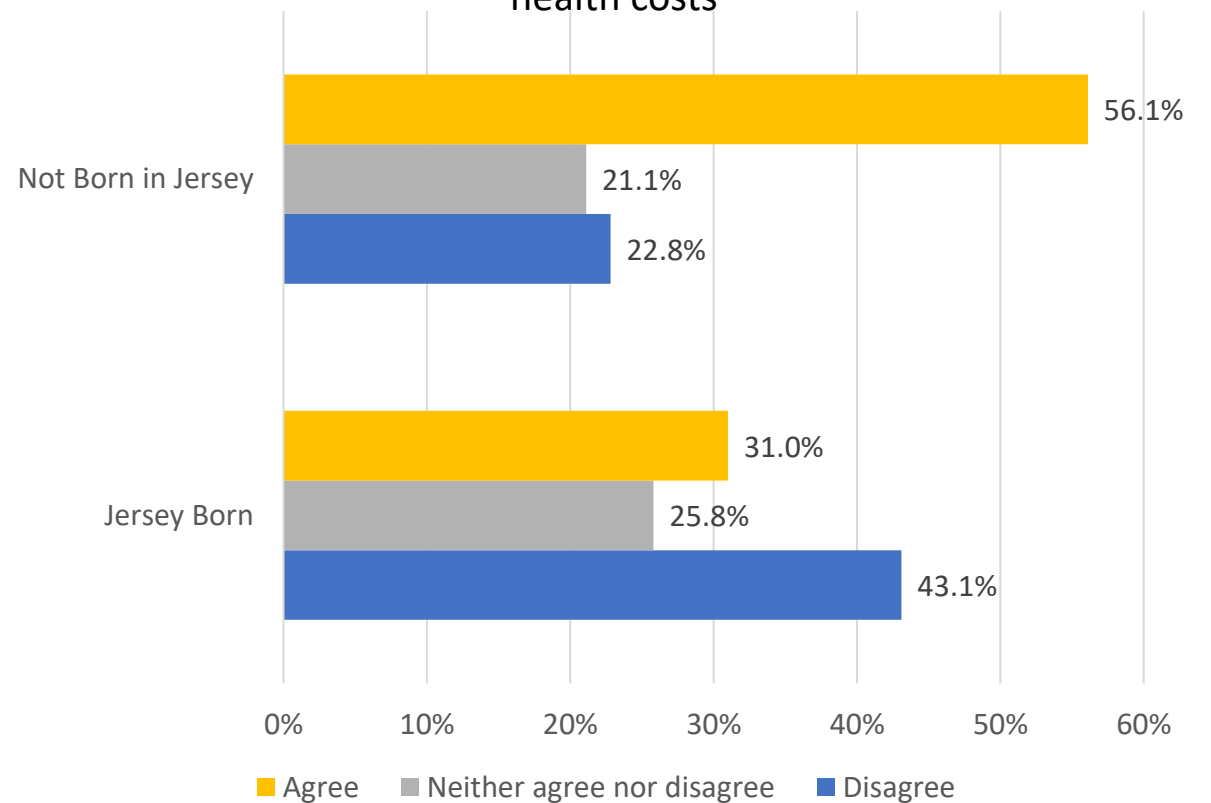
There were noticeable differences of opinion (at least 20 percentage points) between those that were born in Jersey or not on the following questions:



We need to import skilled workers if Jersey is to remain open for business



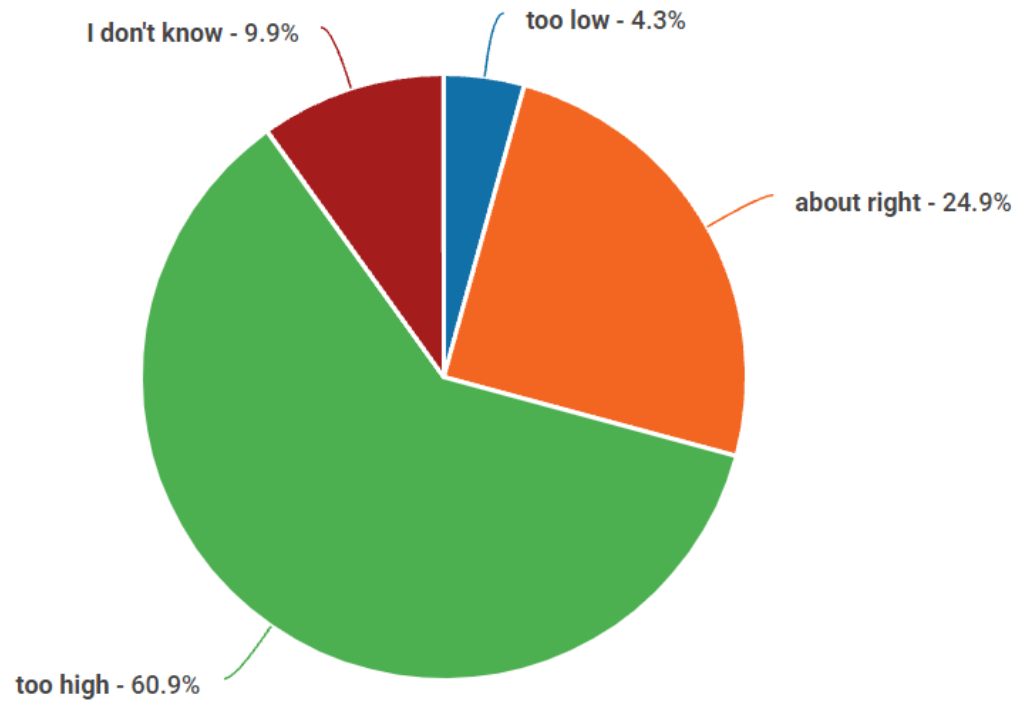
We have an ageing population and are going to need workers to come to Jersey to help with pension and health costs



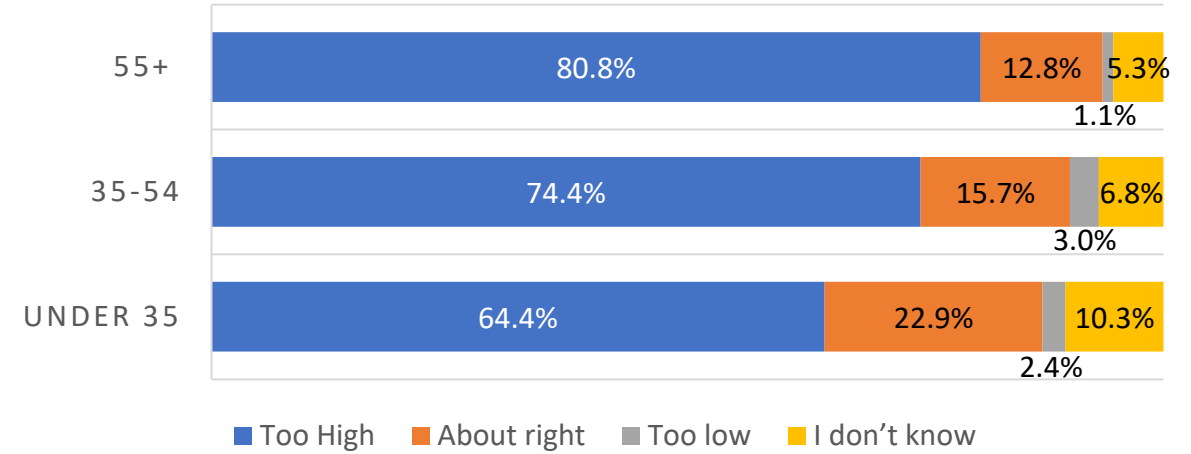
Opinion on the Number of People Living in Jersey



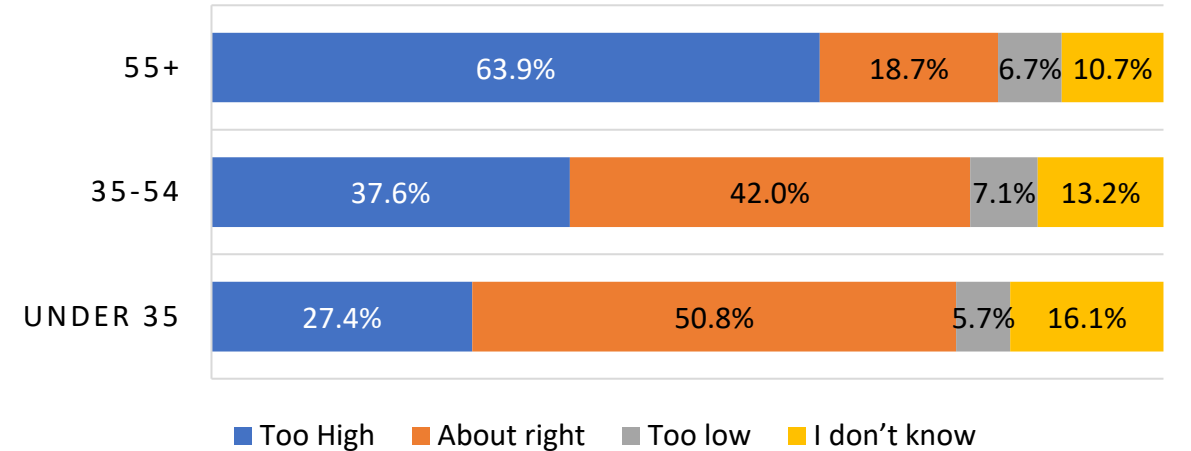
All Respondents



Jersey Born: Opinions by Age



Non-Jersey Born: Opinions by Age

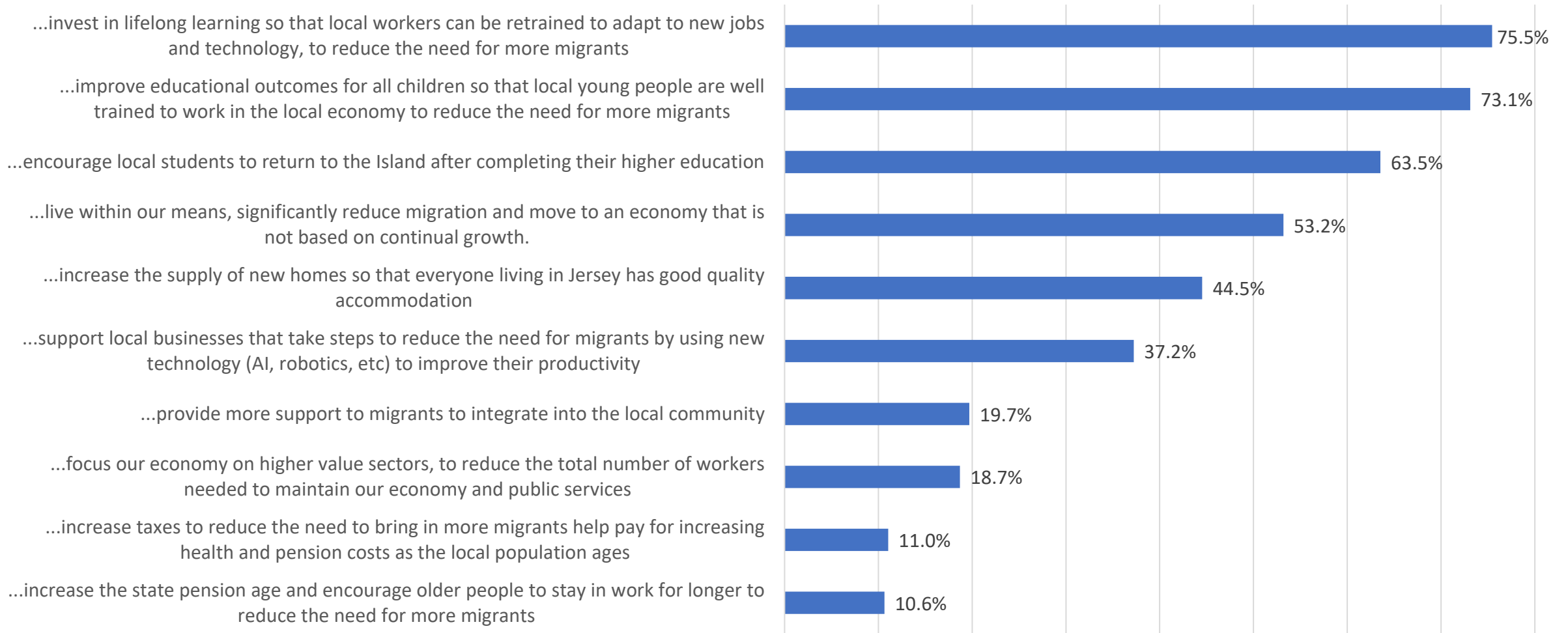


Priorities for Government in Developing a Population Policy

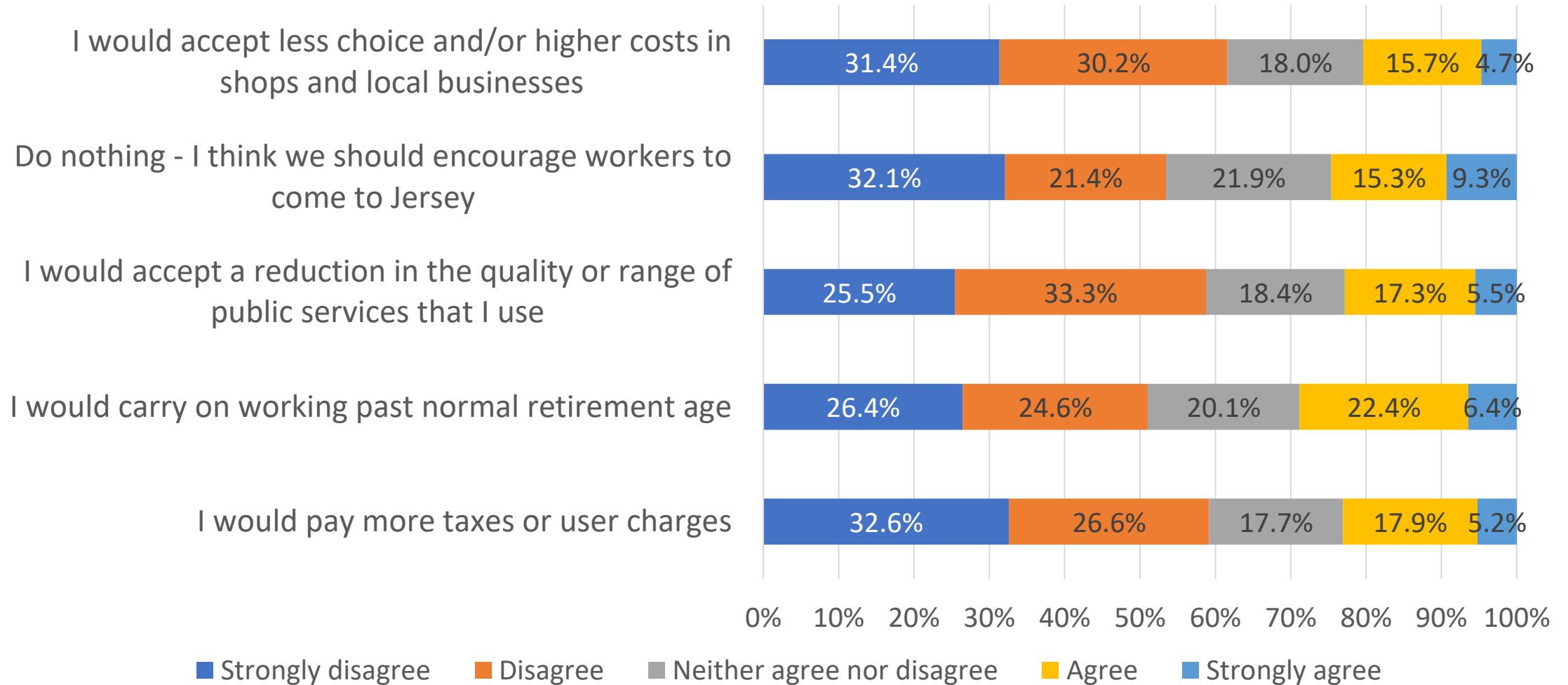


Respondents were asked to select a minimum 3 answers, maximum 5

As an Island, we should...



What are Islanders prepared to do to help reduce the number of migrant workers needed in future?



Measuring Success

FREE TEXT ANSWER



How do you think future governments should measure whether their population policy has been successful?

Key Themes:

1. Measuring Quality of Life
2. Increased amount of affordable housing / housing options / housing quality available
3. Less demand on services and facilities (e.g. hospital waiting time, space in schools, road traffic)
4. Reduction / No increase to overall population
5. Setting migration targets / caps and ensuring they are met
6. Measuring Environmental Impacts (green space, pollution, traffic, housing etc)
7. Utilising economic measures
8. Surveying Locals
9. Employment Rates
10. Setting KPIs and reporting regularly

Vision for the Future

FREE TEXT ANSWER



In 50 years' time, what is your vision for Jersey for yourself, and the children and young people growing up in the Island today ?

Key Themes:

1. Affordable housing and housing options (not just flats)
2. Sustainable and eco-friendly Island (green spaces, less private transport, smaller carbon footprint)
3. Affordable cost-of-living so that it is not just for the wealthy
4. Good education opportunities with greater access, including skills-based training and vocational skills
5. Diversified job market
6. Being a multi-cultural place where equality is valued
7. Less development
8. Low crime and a safe place to live
9. Retaining an Island identity and heritage
10. Being a place that locals want to stay and are given opportunities

Other Comments

FREE TEXT ANSWER



Only comments that were new ideas / did not touch on themes already raised by previous questions in this survey have been presented here

- Introduce visa charge
- Better scrutinise manpower returns
- Help elderly downsize to increase family home availability
- Introduce training quotas for businesses
- Stop taxing pensioners who decide to leave Jersey
- Outsource remote workers instead of needing them to be physically present in Jersey
- Change culture in schools about jobs in Jersey - not just finance sector
- Companies wishing to hire migrants should have to provide them with accommodation
- Educate people on the impact of different choices for migration policies
- Introduce a local and non local housing market
- Incentivise essential workers with other benefit schemes e.g. discounts at supermarkets
- Introduce congestion charges
- More diversity in government, younger voting age etc
- Attract those past pension age to remain in part-time employment, including amending the anti-discriminatory law to stop employers withdrawing pension contributions and life insurance cover.
- Review the Island Plan to calculate what population the island can healthily sustain, what resources and infrastructure is needed to do that and then map out a plan to achieve it
- Grant entitled status for children of Jersey born, who have made their careers elsewhere. Think this would encourage a new generation of people with Jersey heritage to build up the island.
- Incentivise unskilled/unemployed to relocate to UK or elsewhere
- All policies should have a 100-year sustainability test & review periods built-in before being accepted. Policies on a time-scale of a term-of-office, or of a career-politician should always have an review date & default expiry terms.
- Build a Jersey University
- Use research and journals to inform policy not opinion
- Providing funding for old age care homes abroad
- Offer financial grant for those wanting to leave the island