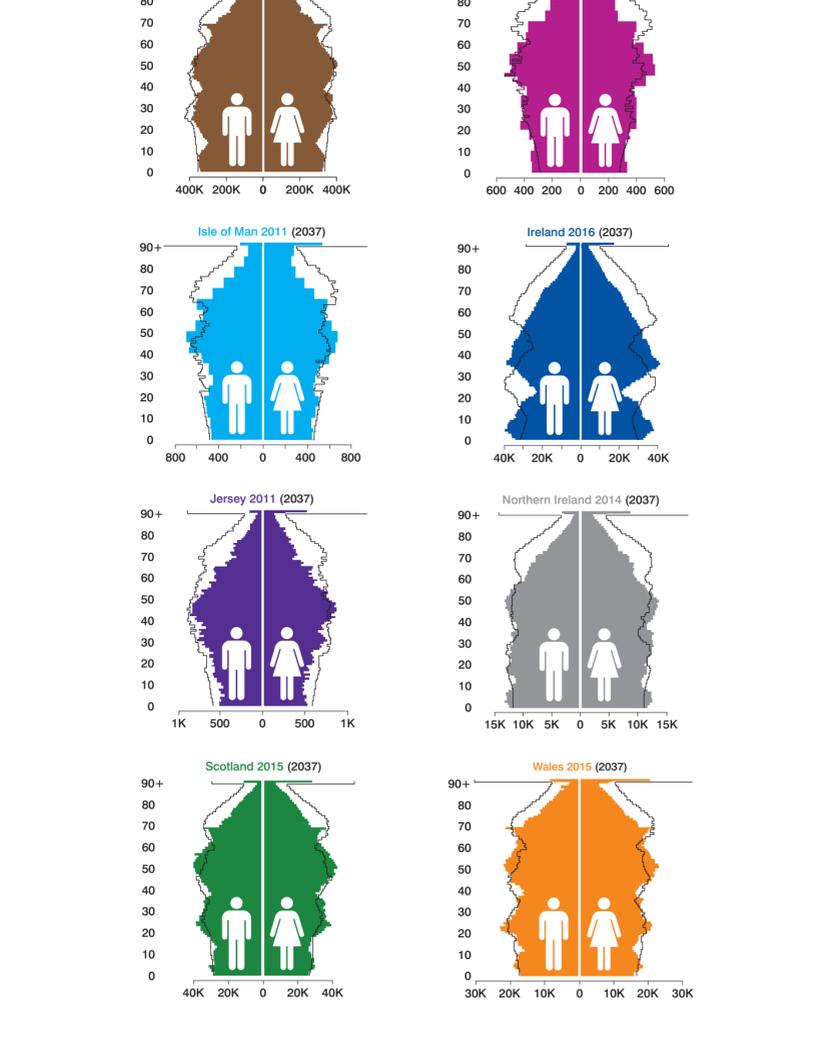
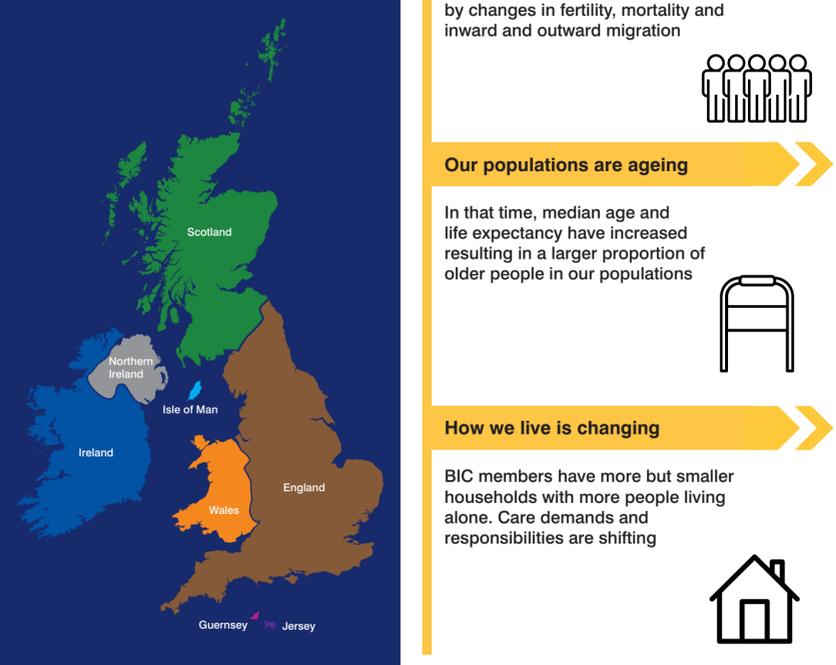


This project supports the strategic framing of the policy discussion around both our population ageing and responding to our ageing societies. We explore our shared backstory and the structural conditions underpinning our options.



Our backstory

Overall, from the late 1940s, all BIC Member Administrations have seen their populations grow, influenced by changes in fertility, mortality and inward and outward migration

Birth rates are rising (until mid-1960s)

53,388,051 Total BIC population 1951

High out-migration leads to population decrease in Ireland and the Isle of Man

High birth rates and positive net migration lead to population growth in the UK and the Channel Islands

1948 - Empire Windrush arrives at Tilbury Docks, London. Beginning of large scale immigration into the UK

Late 1940's - Jersey & Guernsey welcome back evacuees who left the islands in 1940

1947 - spike in the number of births. 881,026 babies born in England & Wales alone

Twice as many people born in Scotland in 1964 than in 2002

1964 baby boom

Economic transformations in the Crown Dependencies lead to high levels of in-migration and rapid population growth

31% of the population in Northern Ireland - 1971

1976 - number of deaths exceeds number of births in England, Scotland and Wales

Scotland and Northern Ireland experience consistently high levels of out-migration. Scotland's population declines

Infant mortality rates are gradually decreasing

Guernsey's population increases by 10% in a decade

Gradual decrease in fertility rates in the UK

1991 - in the Isle of Man, island-born population becomes a minority

Increasingly, migration plays a key role in driving demographic change

'The Celtic Tiger' Ireland experiences unprecedented levels of in-migration

Fewer people are born in Scotland in 2002 than in any other year since World War II

Number of working age people on Jersey increases by 13% between 2001 and 2011

From 2010, out-migration once again exceeds in-migration in Ireland

2012 - highest number of births in the UK since 1972

Our populations are ageing

In that time, median age and life expectancy have increased resulting in a larger proportion of older people in our populations

"Growing up and living in a society where younger people are in a majority is fundamentally different to growing up in a society where the majority of people are in older age groups" (Foresight, Future of an Ageing Population report, 2016)

1961-71 Median age decreases in Northern Ireland, Jersey, Scotland, Ireland and the Isle of Man

Life expectancy and healthy life expectancy are growing

Life Expectancy gender gap (UK)

1982: 6 years

2012: 4 years

Women's life expectancy remains higher than men's across BIC... but the gender gap is narrowing

Life expectancy in Scotland is consistently lower than in other parts of the UK

Healthy life expectancy increases faster than life expectancy in England, Wales and Scotland ...

... but in Northern Ireland the opposite is the case and the number of years not in good health rises

40 Median age reached 40 in Wales, Scotland, and the Crown Dependencies

higher than Pensionable age dependency ratio

Child (0-15) dependency ratio higher than Pensionable age dependency ratio

1971-81 Guernsey's dependency ratio decreases from 65 to 55 "dependants" per 100 working age population

Median age is rising steadily

Life expectancy in Ireland (1950 - 1987)

Year	Male	Female
1950	~65	~70
1952	~65	~70
1960	~65	~70
1962	~65	~70
1965	~65	~70
1967	~65	~70
1970	~65	~70
1972	~65	~70
1978	~65	~70
1980	~65	~70
1982	~65	~70
1985	~65	~70
1987	~65	~70

Region	Median age
EN	N/A
GU	35.2
IM	38.8
IR	29.0
JE	36.1
NI	29.0
SC	32.4
WA	N/A

How we live is changing

BIC members have more but smaller households with more people living alone. Care demands and responsibilities are shifting

Home ownership is increasing (until the 1990s ...)

The higher the dependency ratio the smaller the relative 'earning base' of a population

UK healthcare spending increased more than threefold between 1983 and 2012

Households are becoming more numerous but smaller

2011 - one person households become the most common type in Scotland

Since the late 1990s, the proportion of people aged 65-74 who are economically active has been increasing

Young people are increasingly less likely to own their homes

2011

Average household sizes (2011)

Region	Average household size
GU	2.34
JE	2.31
NI	2.5

14% of older people living in households in England and Wales provided unpaid care

1946 National Insurance Act (UK)

1951 Social Security Policy (Jersey)

1948 National Health Service (UK and the Isle of Man)

1949 White Paper on Social Security (Ireland)

Number of one person households in Ireland was six times lower in 1946 than in 2011

Types of tenure in England and Wales are changing

Year	Private Rented	Socially Rented	Owned
1953	~40%	~10%	~50%
1961	~40%	~10%	~50%
1971	~40%	~10%	~50%
1981	~40%	~10%	~50%
1991	~40%	~10%	~50%
2001	~40%	~10%	~50%
2011	~40%	~10%	~50%

Highest recorded dependency ratio was in the Isle of Man in 1976 - 86.9 (per 100 working age population)

In Ireland, 45,481 people received a contributory state pension in 1970. By 2015 this figure grew to 361,725

UK healthcare spending increased more than threefold between 1983 and 2012

Generation Y (born between 1980 and 2000) tends to view the social security system as purely redistributive (not a provider of social insurance across the lifetime)

In Jersey spending on old age pensions from the Social Security Fund more than doubled between 1999 & 2015

Reflecting on...

Our demography story is shaped by mortality, fertility and migration patterns. These are embedded within broader socio-economic factors and developments, which impact people's attitudes and expectations, changing the ways in which we live, and framing our demographic experience.

Population ageing is one of the key drivers of societal change in Europe. Increasing numbers of people living to a very old age is an achievement of modern science and healthcare. But it brings challenges which necessitate a response. (Commission of the European Communities' Renewed Social Agenda, 2008)

Population ageing can no longer be ignored ... But the social and economic implications of this phenomenon are profound, extending far beyond the individual older person and the immediate family, touching broader society and the global community in unprecedented ways. (Ban Ki-moon in UNFPA and Help Age International's Ageing in the Twenty-First Century report, 2012)

Unlike most of the changes that societies will experience during the next 50 years, these underlying trends are largely predictable. We know that the demographic transition to older populations will occur, and we can plan to make the most of it. (WHO's World report on ageing and health, 2015)

Technical and digital advancements

What will transform lives:

- Mobile internet
- Automation of knowledge
- The internet of things
- Cloud technology
- Advanced robotics
- Advances in energy exploration, production and recovery
- Next-generation genomics
- Energy storage
- 3D printing
- Advanced materials

Raising questions of:

- Digital divides
- Choice
- Privacy
- Connection

Economy and finance

Macro-economic forces

- Stability of markets
- Stability of currencies
- Confidence for investors
- Growth hot-spots

Domestic factors

- Tax base (current and projected)
- Budget deficits
- National debts
- Government expenditure and commitments

... forces changing the world in an enduring way that NEED to be taken into account in future-oriented policy development

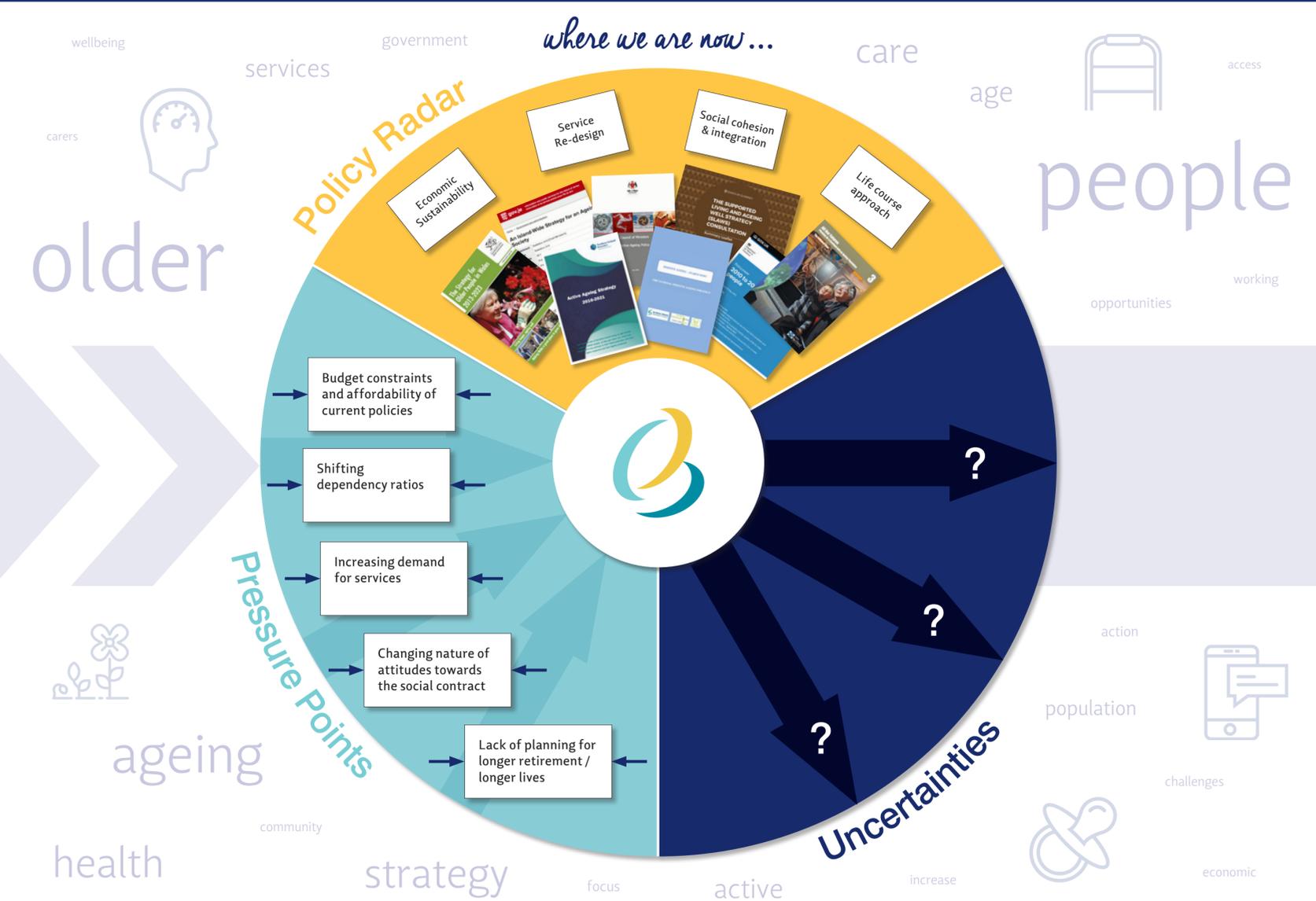
Attitudes and expectations

Problems around:

- Age discrimination, for the oldest and the youngest adults
- Negative stereotypes
- Differing expectations on social security and role of the state
- Contested and shifting notions of 'dependency'
- Financial literacy

Implications:

- Intergenerational tensions
- Inadequate personal planning
- Changing social contracts with the state
- Understanding and experience of loneliness & isolation



Our understanding

- Have you the data, evidence and insights to describe and explain the challenges that lie ahead?
- Is your information accessible enough for all citizens to understand why your demography matters?

Our working lives and incomes

- Are career paths designed to take account of fuller working lives?
- Do those providing care feel recognised and valued in your current arrangements?

Our readiness

- Is your organisation 'ready' for the scale and complexity of the challenges ahead?
- What does success look like?

where we are heading...

UK	Jersey
Guernsey	Northern Ireland
Isle of Man	Scotland
Ireland	Wales

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

Our care

- What prevailing assumptions underpin your societal notions of who cares for whom, and how?
- Who are the winners and the losers from your current arrangements?

Our places and spaces

- Do your built environment investments design-in adaptation and accessibility?
- Are community cohesion and fostering inter-generational dynamics considered in your plans?