

MANPOWER REPORT FOR THE PERIOD 1ST OCTOBER 2001 TO 31ST DECEMBER 2001

**Presented to the States on 25th June 2002
by the Industries Committee**



STATES OF JERSEY

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120

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THE JERSEY LABOUR MARKET AT DECEMBER 2001

This report consolidates the different sources of information about employment and vacancies in Jersey at the end of December 2001, the main sources being the Manpower Survey and the Human Resources Manpower Report.

Overview

The principal feature of the current Jersey Labour Market is that of stability in terms of total employment, but with some growth in inflationary pressure, largely resulting from a substantial increase in the already high number of vacancies.

Excluding seasonal factors, the total headcount in employment has remained virtually static since December 1999, having declined slightly from a peak occurring in the latter half of 1998.

At December 2001, it is estimated that 84% of those employed were locally qualified, a further 2% were “(j)” category and 14% were not locally qualified.

The financial and legal services sector has continued to expand; its share of total employment has increased from 22% to 25% during the past five years.

Over the five-year period from December 1996 to December 2001, public sector employment has remained at approximately 12% of total employment.

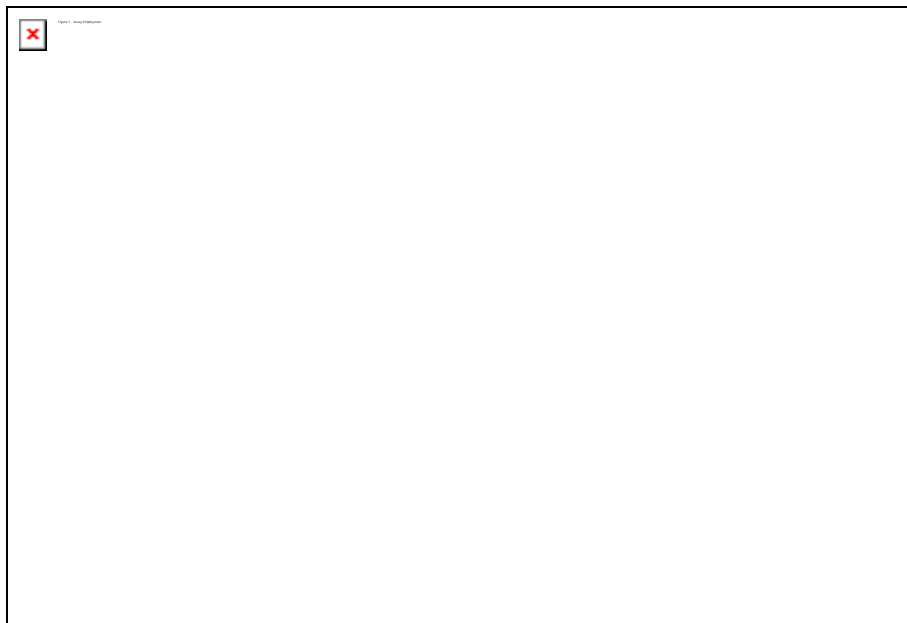
Employment

Employment in the private sector ^[1] on a headcount basis was reported at 44,020. In the public sector (excluding trading departments) the headcount was reported at 6,080, giving a total number in employment, either full-time or part-time, of 50,100. This figure should be regarded as a minimum estimate of the total number of jobs occupied, as in the private sector some of the smallest businesses do not have to make returns and in the public sector temporary staff, retained firemen, supply teachers and health bank staff are not included in the figures. There are thought to be at least 300 of these staff, mainly part-time, who were actually employed at some time in the month preceding the snapshot date.

Over the 12 months to December 2001, total employment on a headcount basis increased by 240 staff (+0.5 %).

Sectoral breakdown

Figure 1 shows the sectoral distribution of people employed: a quarter (25%) of the total were employed in Financial and legal services (12,610); almost one-sixth (16%) were engaged in Wholesale and retail trades (8,040). ^[2]



Vacancies

3,870 vacancies were reported by the private sector in December 2001, 9% of the total number employed; in the public sector there were 320 vacancies reported, 5% of the number employed. Public sector vacancies broadly represent the difference between posts approved and staff actually employed. In the private sector, however, vacancies are only enumerated if the employer is actively trying to recruit staff to fill them. It is difficult, therefore, to draw conclusions about differences in labour market pressures in the public and private sectors because of the different mechanisms for obtaining approval for the recruitment of staff.

The total figure of 4,190 vacancies is some 600 higher than six months previously. When viewed in comparison with registered unemployment (187 for December 2001) this represents a further intensification of the high level of pressure in Jersey's labour market, which is likely to generate wage competition, inflation and a rapid rate of staff turnover.

Employment qualifications

The Manpower Survey of December 2001 recorded the employment qualification of staff for the first time. Each undertaking reported the numbers of locally and non-locally qualified employees in the context of the definitions specified by the *Regulation of Undertakings and Development (Jersey) Law, 1973 as amended*.

Of the 44,020 total headcount in the private sector: 83.0% were locally qualified; a further 1.3% were qualified under “(j)” category; and the remaining 15.7% were not locally qualified. It is noteworthy (particularly in the context of the number of reported vacancies and the economic activity and participation rates of the resident population ^[3]) that under three-year joint licences issued up to the end of December 2001 (through Part II of the Law) 22.1% of authorised staffing was approved for non-locally qualified persons.

The Human Resources Department estimates that 99% of public sector staff were locally qualified (including “(j)” category) as at December 2001. On the basis of 2001 Census information, it is estimated that 7% of public sector employees were “(j)” category.

Historical information

Figure 2 shows the trend in private sector employment over the last five years, and also total employment, defined as the sum of the private and public sectors. ^[4] The trend line suggests that total employment in Jersey has been substantially constant for the past two years.



^[5] The headcount estimates on which Figure 2 is based are presented in Table 1. As indicated in the table, the total number in employment rose rapidly from 51,790 at June 1996 to a peak of 55,460 at June 1998 and then fell slightly to level out at just

below 54,000 for June 2000 and June 2001.

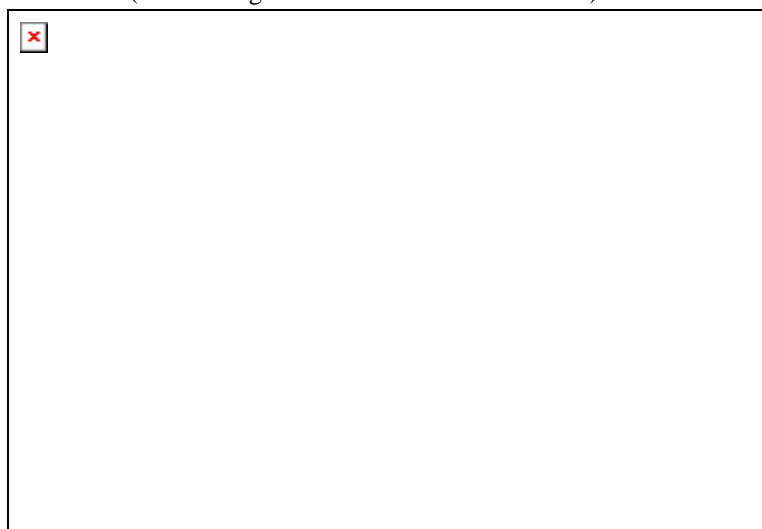
Table 1. Employment (headcount) in the public and private sectors

	<u>1996</u>		<u>1997</u>		<u>1998</u>		<u>1999</u>		<u>2000</u>		<u>2001</u>	
	Dec.	June	Dec.	June	Dec.	June	Dec.	June	Dec.	June	Dec.	
)	41,180	47,030	43,850	49,530	44,700	48,830	43,680	47,830	43,910	47,610	44,020	
)	5,770	5,920	5,800	5,930	5,930	6,130	5,960	6,070	5,950	6,160	6,080	
)	46,960	52,960	49,660	55,460	50,630	54,960	49,640	53,900	49,860	53,770	50,100	

Numbers are rounded independently to the nearest 10.

Figure 3 (shown overleaf, and also based on numbers presented in Table 1) shows the trend in public sector headcount. The headcount has risen from 5,770 at December 1996 to 6,080 by December 2001. Although this change constitutes a 5% increase, most of the growth occurred prior to June 1999, since when the headcount in this sector has increased at a much slower rate (discounting short-term seasonal variations).

[6]



The trend in full-time equivalent numbers of filled positions (“Actual FTE”) in the public sector is also shown in Figure 3. This measure of employment includes permanent, contract, seasonal and training positions weighted according to the proportion of a full week actually worked. Public sector full-time equivalent employment increased by 234 between December 1996 and December 2001, an increase of 4% over the five-year period.

Vacancies in the private sector have been recorded by the Manpower Survey since March 1999. Hence, the first occasion on which combined public and private sector totals could be estimated was June 1999. Table 2 shows the numbers of vacancies reported from that date and the corresponding totals.

Table 2. Vacancies in the public and private sectors

	<u>1999</u>		<u>2000</u>		<u>2001</u>	
	Jun	Dec	Jun	Dec	Jun	Dec
Private	3,050	3,710	3,860	3,440	3,340	3,870
Public	130	280	250	310	250	320
Total	3,180	3,990	4,110	3,750	3,590	4,190
Vacancies as %	5.8	8.0	7.6	7.5	6.7	8.4

**of total
employed**

Vacancies for full-time positions constituted 87% of all private sector vacancies in June 1999 and 81% of those in December 2001.

Figure 4 shows the total number of vacancies and also the number in the private sector.



International comparisons

In the U.K., for the fourth quarter of 2001, there were an estimated 28.4 million people employed and 1.0 million people claiming unemployment benefits. Jobseekers were therefore 3.5% of employment in the U.K., as compared to slightly less than 0.4% in Jersey. However, this comparison is likely to be affected by the absence of unemployment benefits in Jersey, reducing the incentive to register as unemployed. A less biased indicator is the proportion of ILO unemployed: ^[7] in the U.K. this has stood at 5.1% for the last twelve months; at the time of the 2001 Census, the ILO rate for Jersey was 2.1%.

Publication of U.K. information on vacancies has been deferred due to the transfer of compilation of vacancy statistics from local Job Centres to regional customer service centres. The U.K. intends to publish figures as soon as a consistent measure is produced; hence, it is not currently possible to compare Jersey and U.K. vacancy rates.

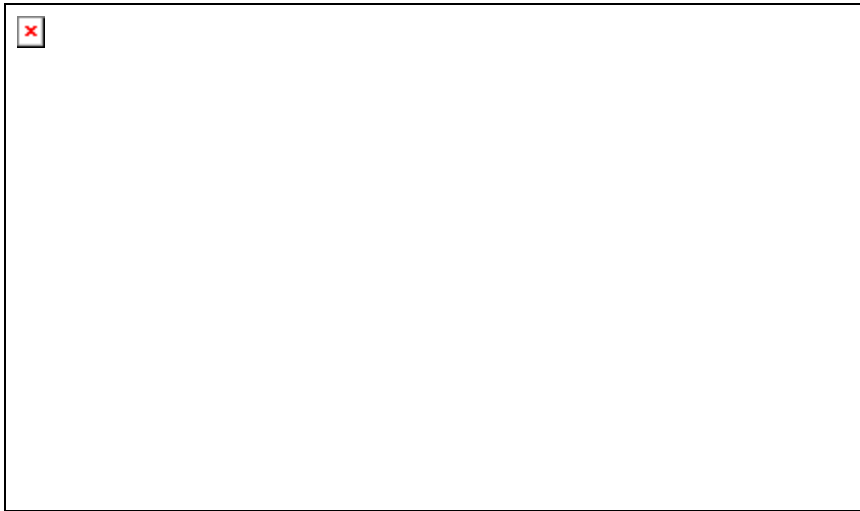
This report, prepared at the request of the Industries Committee, draws on information compiled by the Statistics Unit in the Policy and Resources Department and the States Human Resources Department.

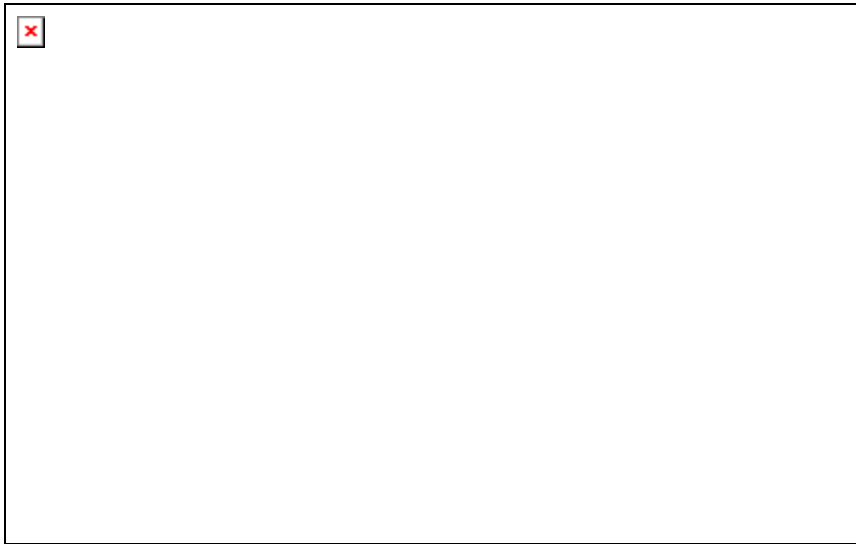
Further information about the Manpower Survey is available from the Statistics Unit, telephone 603423, and about States Manpower from the Human Resources Department, telephone 603001. Enquiries about the requirements of the Regulation of Undertakings and Development Law should be addressed to the Regulation of Undertakings Unit, telephone 603710.

MANPOWER REPORT

In the 12 months to December 2001 employment in Jersey undertakings remained effectively constant: full-time employment increased by 80 to 34,910 and part-time employment rose by 20 to 7,760. Following the negligible annual changes recorded for the previous five quarters, this very small increase in full-time employment (0.2%) affirms that the underlying trend in employment is flat. However, a sharp increase in the number of vacancies (+560 in the quarter to December) indicates that the pressure in the labour market has further intensified. This rise should be viewed with a degree of caution because substantial changes were made to the December 2001 returns as compared to earlier returns. Nevertheless, the increase in vacancies was observed in several sectors over a large number of businesses.

In the fourth quarter of 2001, full-time employment decreased by 2,680 and part-time employment decreased by 270. These short-term changes are largely attributable to seasonal factors, as can be seen from Figure 1a; the underlying trend, excluding seasonal and other short-term variations, is shown by Figure 1b (see Note 2). The 12-month percentage changes are shown in Figure 2.



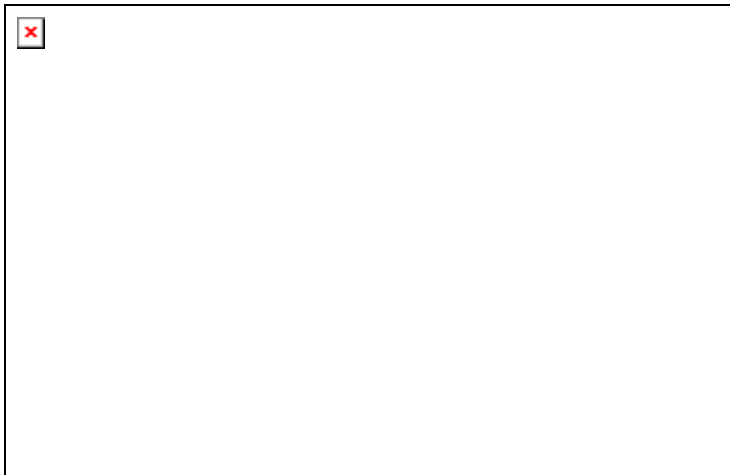


Due to single-person undertakings not being consistently recorded in the past, the above comparisons do not include such enterprises, of which there were 1,350 reported in December 2001, 70 more than a year earlier. Detailed figures excluding single-person undertakings are presented in [Appendix 1](#); those including single-person undertakings are shown in [Appendix 2](#) (see Note 3).

Vacancies

Since March 1999 undertakings reporting to the Manpower Survey have provided figures for numbers of vacancies. It is possible that, in the past, there may have been a degree of over-stating of vacancies due to some businesses reporting positions which they had no immediate intention of filling. From September 2000, however, the survey form was revised to emphasise that only vacancies which businesses were actively seeking to fill should be included. The fall in vacancies in the third quarter of 2000 was thus probably largely attributable to this reporting change. A further change to the form took place at December 2001.

The increase of 560 vacancies over the fourth quarter of 2001 (to a total of 3,870, a rise of 17%) shows that the pressure in the labour market, already high, intensified over the quarter. Vacancies (both full and part-time) constituted 8.8% of total employment; of these unfilled posts 3,140 were full-time.



Using as an indicator for a given sector the number of vacancies as a proportion of total employment (including one-person businesses), labour shortages were most severe in computer and related activities (16%) and miscellaneous business activities (14%). By this criterion, staff shortages were least evident in transport, storage and communication (5%) and education, health and other services (6%).

The number of full-time vacancies increased most in construction and quarrying, wholesale and retail trades and hotels, restaurants and bars. Each of these sectors recorded an increase of approximately 100 full-time vacancies, both with respect to the previous quarter and the same quarter last year. For construction and quarrying and wholesale and retail trades the increase in vacancies appeared uniformly across the sector; in the case of hotels, restaurants and bars, the increase was principally in the restaurant category.

Part-time vacancies increased particularly sharply, by 59% to 730, over the quarter to December. The number of part-time jobs unfilled was highest in wholesale and retail trades and miscellaneous business activities.

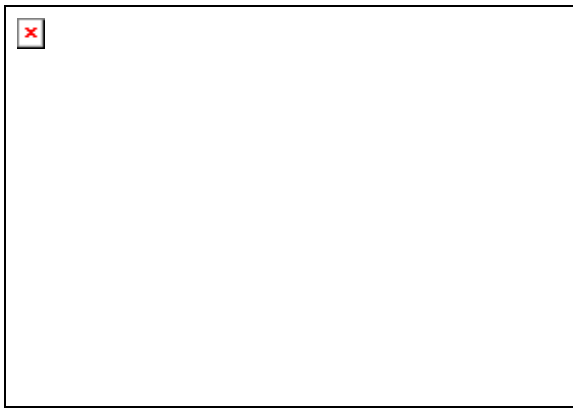
Employment qualifications

The employment qualification of staff was recorded for the first time in the December 2001 Manpower Survey. Each undertaking reported the numbers of locally and non-locally qualified employees (see Note 4 for definitions); full-time “(j)” category employees were recorded separately from other locally qualified staff. The numbers of staff in each category by sector are set out in [Appendix 3](#).

Figure 4 shows the breakdown by employment qualification of all staff (including one-person businesses); approximately five-sixths were locally qualified (including “(j)” category) under the five-year rule.

In total the proportions of full-time and part-time staff who were non-qualified were very similar: about one in six in each

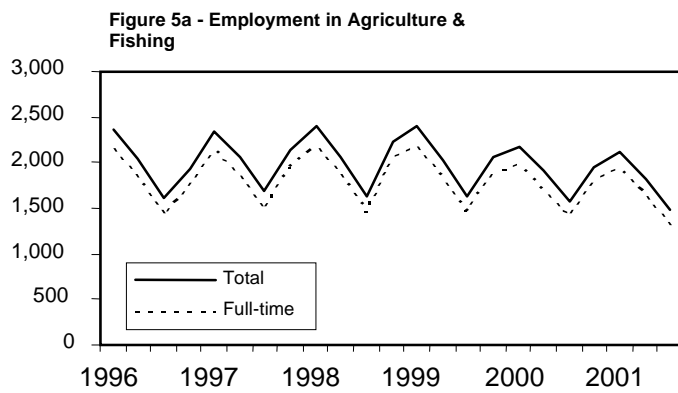
case. This may be thought surprising: it is commonly assumed that part-time jobs are more likely to be occupied by longer established Jersey residents.



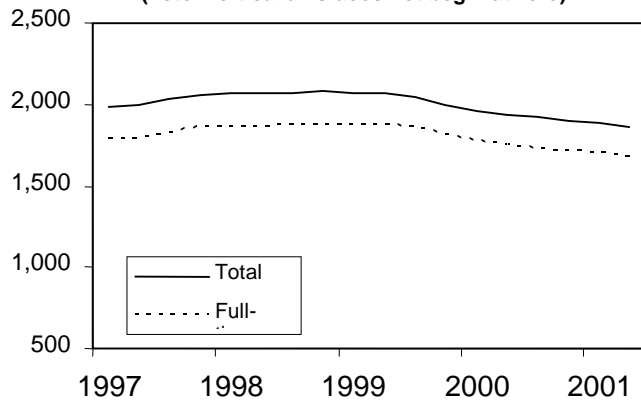
Sectoral analysis of employment - general

The total number of staff employed in all undertakings (excluding one-person businesses) increased by 100 over the 12 months to December 2001. The largest increases occurred in construction and quarrying (+8%) and in financial and legal activities (+2%). In contrast, decreases in overall employment were greatest in hotels, restaurants and bars (-6%) and in agriculture and fishing and miscellaneous business activities (both -5%).

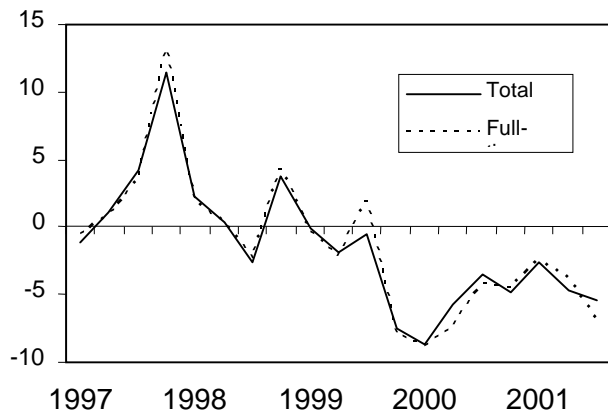
Agriculture and fishing

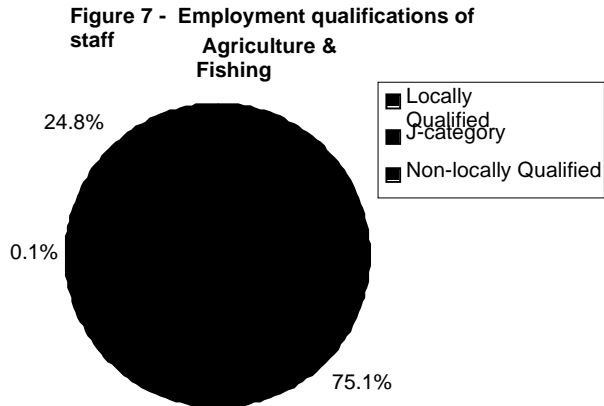


**Figure 5b - Underlying trend in employment
Agriculture & Fishing**
(note: vertical axis does not begin at zero)



**Figure 6 - Twelve month percentage changes
Agriculture & Fishing**





Employment in agriculture is highly seasonal, as may be seen from Figure 5a. The peak number employed rose to some 2,400 in June 1998, but had fallen to 1,490 by December 2001. Figure 5b illustrates the underlying long-term decline apparent since late 1998; Figure 5c indicates that the annual rate of decrease has been of order -5% for each of the last ten quarters.

A quarter of those employed in the agriculture and fishing sector were non-locally qualified, despite the fact that the survey was conducted at a time when seasonal staff are at a minimum.

Manufacturing

Figure 8 - Employment in Manufacturing

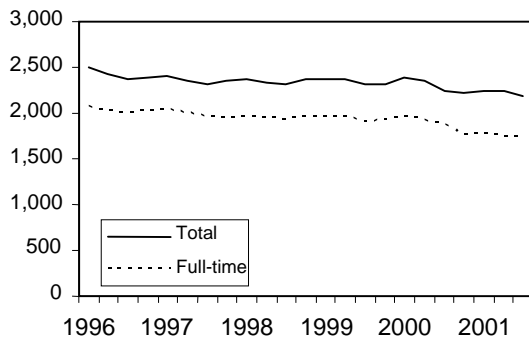
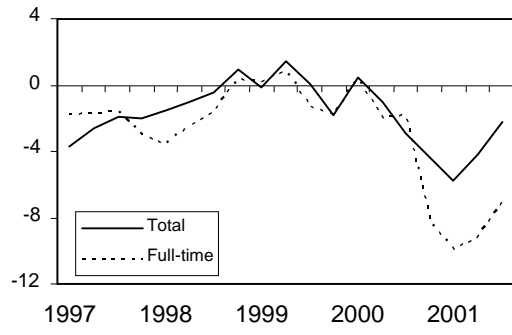
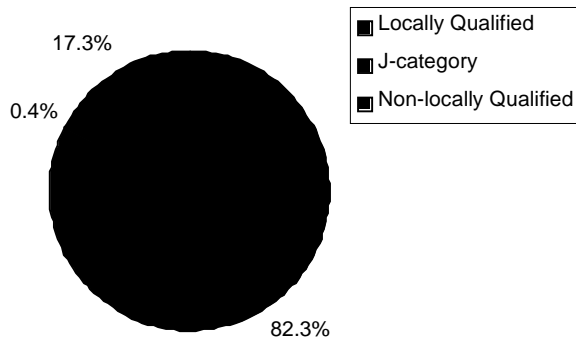


Figure 9 - Twelve month percentage changes
Manufacturing



**Figure 10 - Employment qualifications of staff
Manufacturing**

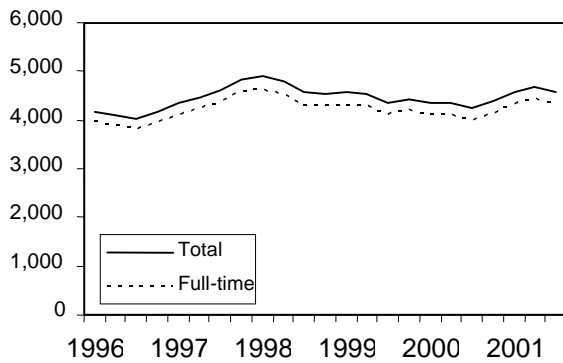


Employment in manufacturing has been declining slowly for several years (Figure 8). The decline continued in the 12 months to December 2001, when the annual rate was -2%.

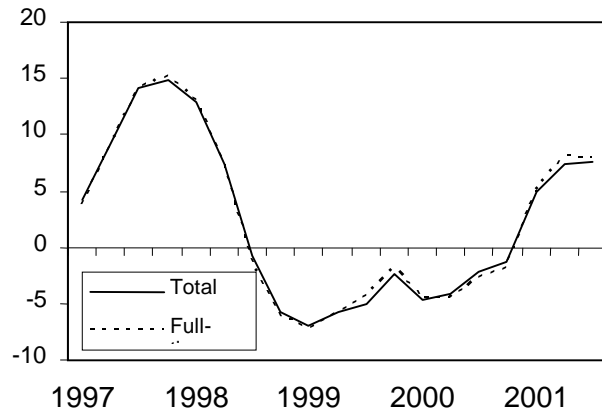
The proportion of manufacturing employees who were not locally qualified was a little higher than the overall average.

Construction and quarrying

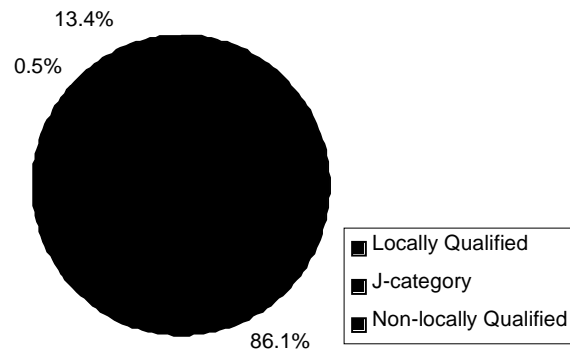
Figure 11 - Employment in Construction & Quarrying



**Figure 12 - Twelve month percentage changes
Construction & Quarrying**



**Figure 13 - Employment qualifications of staff
Construction & Quarrying**

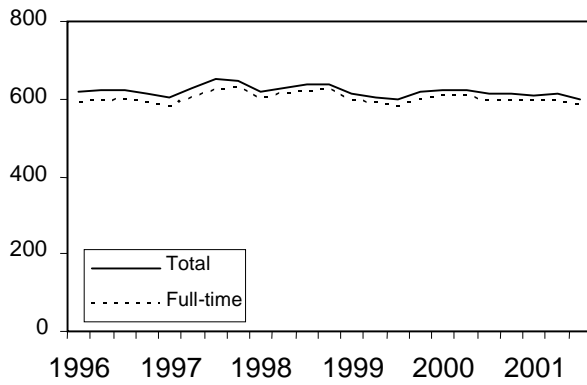


This sector experienced significant growth throughout 2001 (Figure 12); at December 2001, the annual rate of increase in employment stood at almost 8%, the greatest for any sector, and reflecting the ongoing activity in the industry.

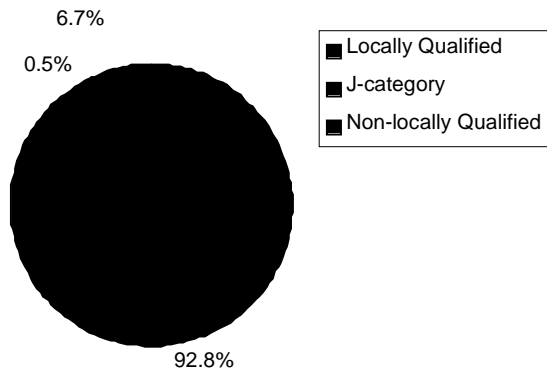
At 13%, the proportion of employees in the construction sector who were non-locally qualified was lower than the average for all sectors.

Electricity, gas and water

Figure 14 - Employment in Electricity, Gas & Water



**Figure 16 - Employment qualifications of staff
Electricity, Gas, & Water**

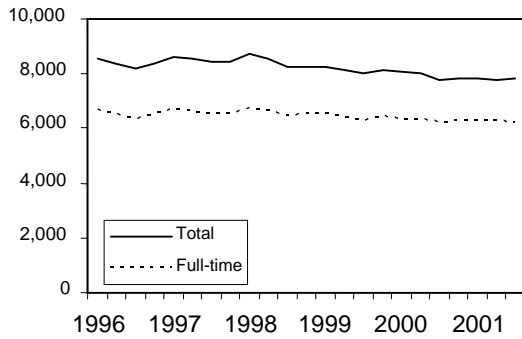


Overall employment in the utilities sector has remained relatively stable for the past two years (Figure 14). The decrease of approximately -2% in total employment over the 12 months to December 2001 (Figure 15) arises from a reduction in headcount of 10.

The proportion of locally qualified employees (93%) is the third highest of the eleven sectors.

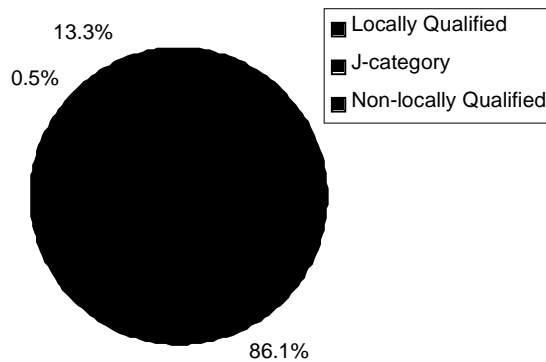
Wholesale and retail trades

Figure 17a - Employment in Wholesale & Retail Trades





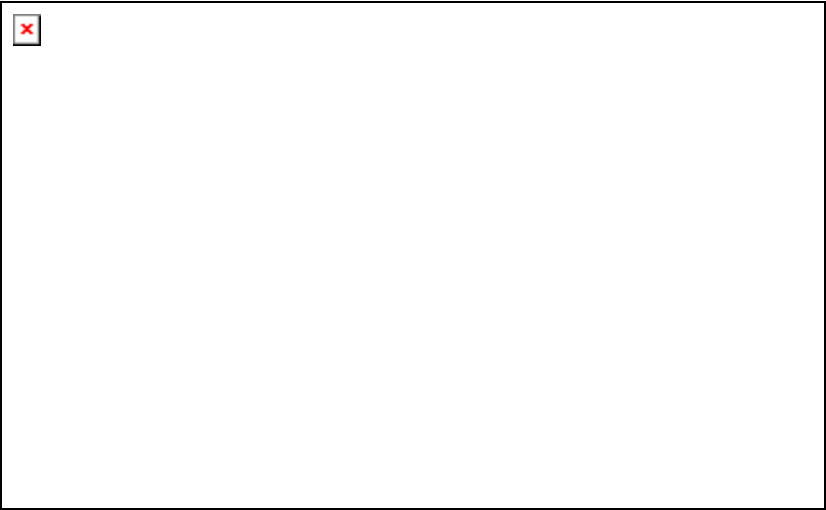
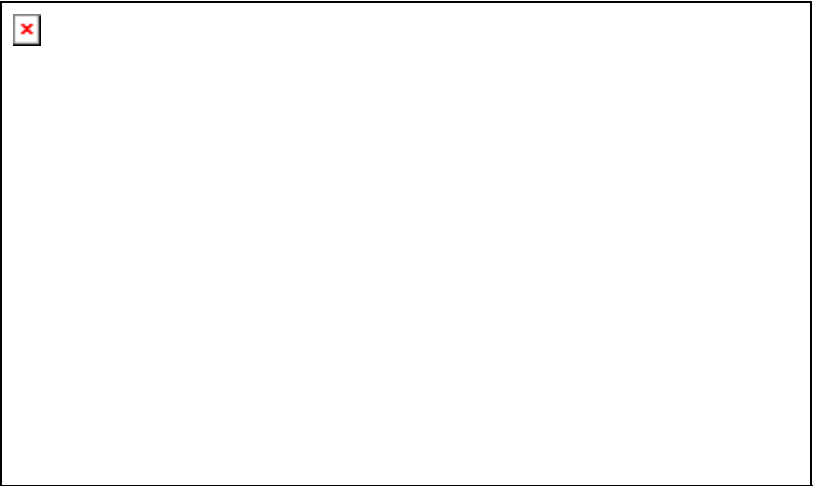
**Figure 19 - Employment qualifications of staff
Wholesale & Retail Trades**



Seasonal factors tend to obscure the growth that occurred in this sector up to mid-1998 (Figure 17a); this growth is apparent in the trend shown by Figure 17b. Employment in the sector has since undergone a continuous decline, as shown by Figure 18, at an average annual rate of some -3%. The figures for December 2001, however, show a small increase (0.6%) over the previous 12-months, and coupled to the increase in the number of vacancies (+100 over the quarter, and with respect to the previous year) constitute the first hint of growth in the sector for three years.

The proportion of employees in the sector who were non-locally qualified (13%) was a little below the average for all sectors.

Hotels, restaurants and bars

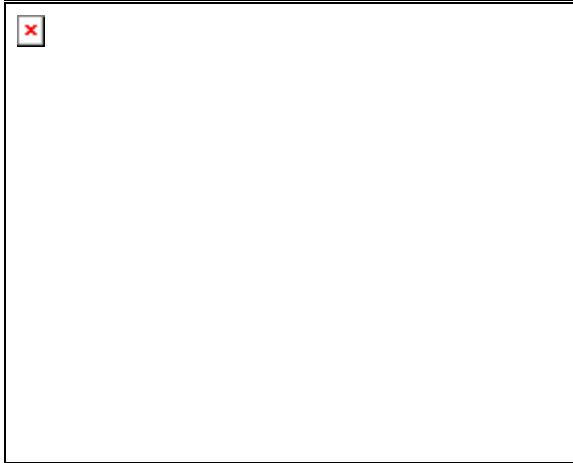
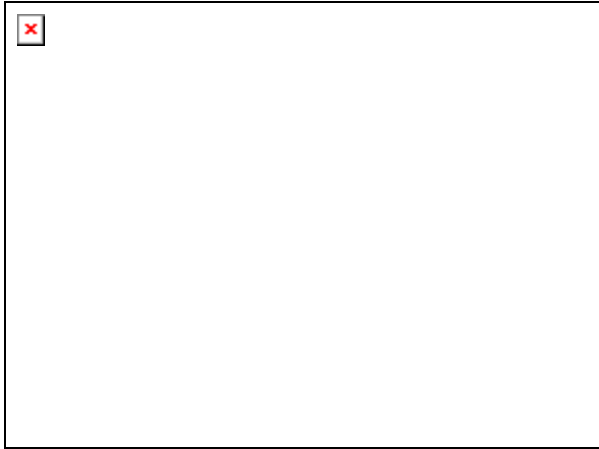




This is the most seasonal of all sectors, with variation of some 2,500 staff between winter and summer (Figure 20a). However the underlying decline in employment in this sector since late 1998 continues (Figure 20b); the change in employment of almost -6% observed over the 12 months to December 2001 represents a reduction of some 270 staff compared to December 2000.

This sector had the highest proportion of non-locally qualified staff, at approximately two-fifths, even though the number of seasonal staff is at a minimum in December.

Transport, storage and communication

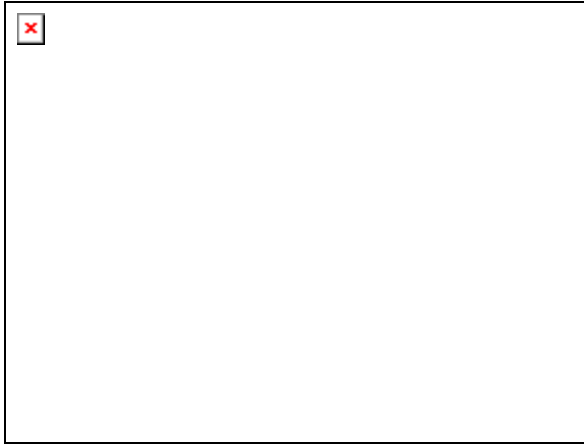




The figures shown for this sector include all the States Trading Committees: Airport, Harbours, Postal Administration and Jersey Telecom. The strong seasonal pattern apparent in Figure 23a reflects the importance of tourism to road, sea and air transport. The recent underlying trend (Figure 23b) is that of a very slow decrease in total employment over the last two years; the sector recorded a decrease of -2% in total employment over the year to December 2001 (Figure 24).

The transport, storage and communication sector has the highest proportion of locally qualified staff (95%).

Computer and related activities



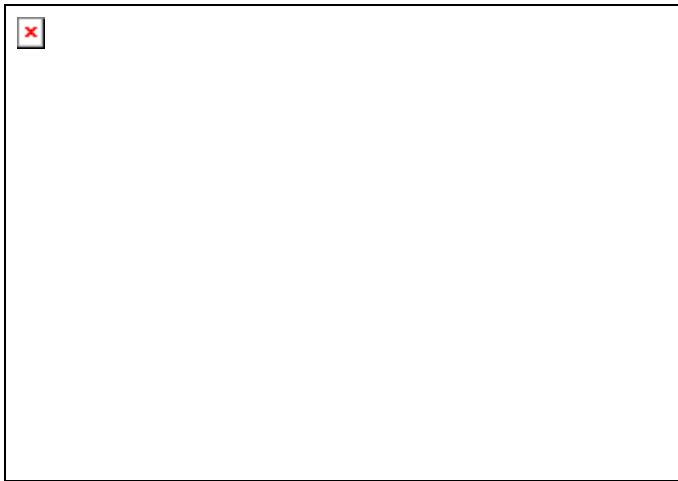
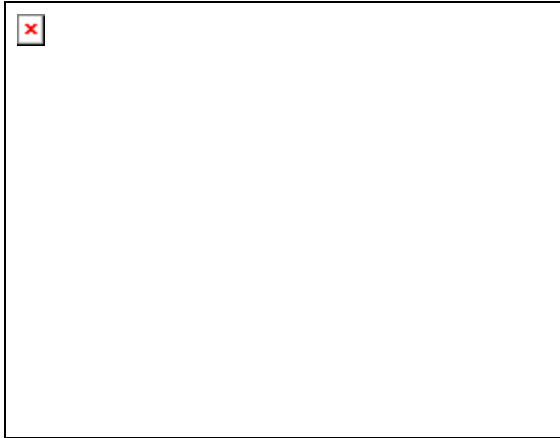


The computing sector recorded a decrease in total employment of -3% in the 12-months to December 2001; however, the total headcount is relatively small, and the decrease represents a reduction of some 10 staff. Nevertheless, this most recent reduction follows the first annual decrease observed for the sector, in September 2001, and suggests that the rapid growth observed between 1996 and 2000 may have come to an end.

The proportion of locally qualified staff (93%) is substantially above the overall average for all sectors.

Financial and legal activities





“Financial Activities” include banking, investment, insurance and accounting; with the inclusion of legal activities, employment in the sector passed 10,000 in 1996. There was then rapid growth until 1998 (Figure 29). Since that time, employment in the sector has grown more slowly, and for 2001 the growth averaged approximately 3% over each preceding 12-month period (Figure 30). In December 2001 the total headcount stood at 12,490.

The financial and legal activities sector has the highest percentage of “(j)” category employees (2.8%).

Miscellaneous business activities



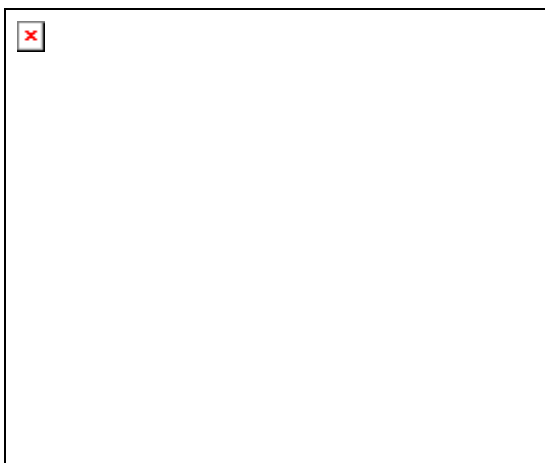


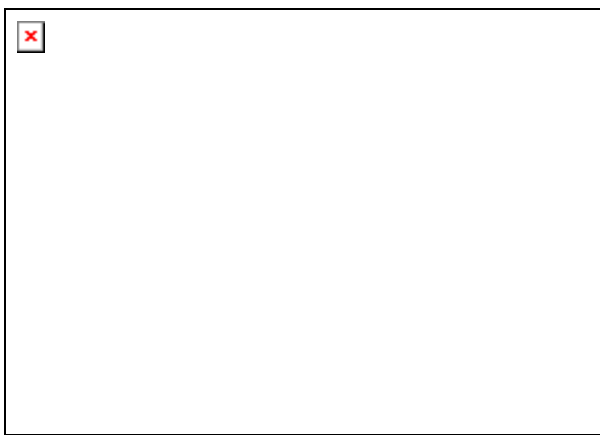
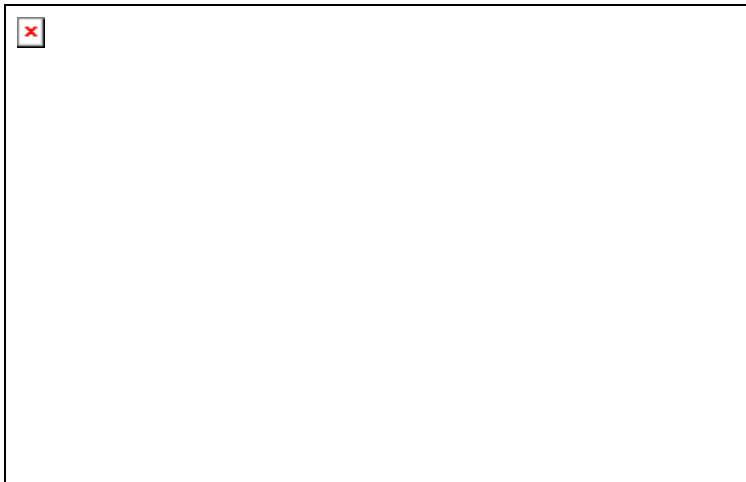
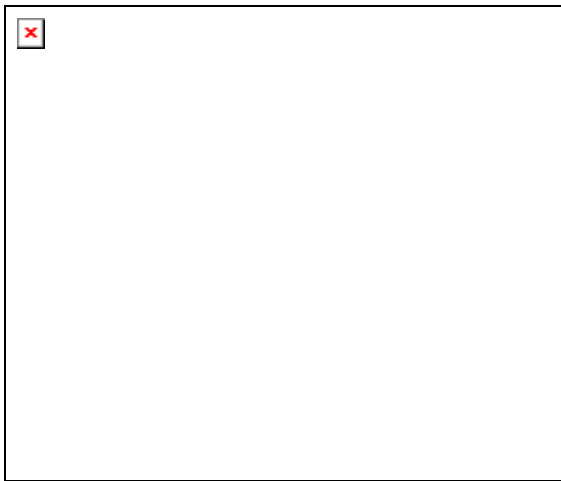


The “Miscellaneous business activities” sector includes estate agency, architecture, car hire, security services and a wide range of other activities, and has a very high proportion of part-time staff. The car-hire element accounts for most of the seasonal pattern apparent in Figure 32a. The sector experienced a -5% decrease in employment over the 12 months up to December 2001, after a period of quite rapid growth in 2000 (Figure 33).

Just under a quarter of all staff in this sector were non-locally qualified.

Education, health and other services





This sector comprises only the private sector activities in these fields: general practitioners, dentists, schools and welfare organisations. The moderate level of cyclic behaviour apparent in Figure 35a is due principally to seasonal elements in sporting, entertainment and cultural activities. The recent trend in employment has been upward (Figures 35b and 36), reached a peak of some 4,300 in June 2001 and stood at 4,100 in December 2001. The 12 month growth rate has varied between one and 3% over the last two years.

This sector comes second to finance in the proportion of “(j)” category staff (2.1%).

Notes:

1. The Manpower Survey encompasses over 4,600 undertakings in Jersey, employing a total of over 47,000 staff (June 2001) including more than 8,000 part time staff (who may have more than one job). Prior to December 2001, the Survey was conducted quarterly; from June 2002 the survey will take place at six-monthly intervals. The Survey is analysed by the Statistics Unit of the Policy and Resources Department of the States of Jersey, on behalf of the Industries Committee.
2. The trend series shown in Figures 1b, 5b, 17b, 20b, 23b, 32b and 35b are calculated using a weighted moving average over 5 quarters; the derived average is then assigned to the middle quarter.
3. The historic numbers presented in the Appendices for sectoral employment show some slight variations relative to those presented in previous Manpower Survey reports. These variations arise from two sources: a small degree of reclassification of industries to the different sectors, in order to more realistically reflect the Jersey-specific nature of business; and minor revisions to staffing levels reported by a small number of undertakings.
4. The definition of "locally qualified" as applied under the *Regulation of Undertakings and Development (Jersey) Law 1973, as amended*, includes all persons in the following categories:
 - (i) residentially qualified persons falling within any of the Housing Regulations, excluding Regulations (l) and (m);
 - (ii) persons resident for the whole of the past consecutive 5 years;
 - (iii) the spouses of (i) or (ii) above;
 - (iv) the children under 18 years (or if students under 25 years) of those in (i), (ii) or (iii) above.

The analysis in this report further divides the locally qualified between "(j)" category and the remainder.
5. Further information about the Survey is available from the Statistics Unit, telephone 603423. Enquiries about the requirements of the Regulation of Undertakings and Development Law should be addressed to the Regulation of Undertakings Unit, telephone 603710.

Statistics Unit
Policy and Resources Department
June 2002

Appendix 1 - Manpower Engaged by Sector

(in businesses in which two or more people are engaged)

	Jun-96	Sep-96	Dec-96	Mar-97	Jun-97	Sep-97	Dec-97	Mar-98	Jun-98	Sep-98	Dec-98	Mar-99
Full-time staff												
Agriculture and Fishing	2,150	1,840	1,420	1,730	2,140	1,860	1,470	1,960	2,180	1,870	1,440	2,040
Manufacturing	2,070	2,030	1,990	2,010	2,030	1,990	1,960	1,950	1,960	1,940	1,930	1,960
Construction and Quarrying	3,940	3,880	3,820	3,960	4,100	4,230	4,360	4,560	4,630	4,530	4,290	4,260
Electricity, Gas and Water	590	590	600	590	580	600	620	630	600	610	620	620
Wholesale and Retail Trades	6,660	6,510	6,320	6,490	6,710	6,630	6,530	6,500	6,740	6,610	6,470	6,510
Hotels, Restaurants & Bars	6,720	6,070	3,880	4,540	6,770	6,150	4,100	4,800	6,770	6,160	4,130	4,820
Transport, Storage & Communication	2,330	2,250	2,180	2,290	2,380	2,350	2,340	2,280	2,500	2,430	2,370	2,370
Computer and related activities	170	180	190	200	200	210	210	210	230	210	210	220
Financial and Legal Activities	8,750	8,870	8,990	9,150	9,310	9,570	9,820	10,040	10,230	10,660	10,470	10,470
Miscellaneous Business Activities	1,000	940	880	940	1,000	990	990	990	1,070	1,070	990	1,000
Education, Health and Other Services	2,530	2,450	2,370	2,500	2,620	2,560	2,500	2,570	2,680	2,660	2,560	2,660
Total full-time staff	36,910	35,590	32,630	34,400	37,840	37,140	34,890	36,480	39,580	38,750	35,470	36,920
Part-time staff												
Agriculture and Fishing	220	200	190	200	200	200	210	190	220	200	200	160

Manufacturing	440	400	370	380	390	370	360	390	420	390	380	41
Construction and Quarrying	230	220	220	230	250	250	250	260	270	270	280	26
Electricity, Gas and Water	30	30	30	30	20	30	30	20	20	20	20	2
Wholesale and Retail Trades	1,910	1,890	1,860	1,890	1,930	1,930	1,930	1,920	2,010	1,910	1,810	1,71
Hotels, Restaurants & Bars	1,010	880	790	970	1,100	1,010	940	980	1,190	1,050	960	1,06
Transport, Storage & Communication	290	280	170	180	330	320	200	250	370	360	260	26
Computer and related activities	20	20	20	20	30	30	30	30	40	50	50	5
Financial and Legal Activities	1,270	1,280	1,300	1,300	1,290	1,300	1,300	1,330	1,370	1,350	1,370	1,36
Miscellaneous Business Activities	1,030	1,020	1,010	1,010	1,000	1,010	1,010	1,070	1,190	1,180	1,150	1,16
Education, Health and Other Services	1,280	1,270	1,250	1,280	1,300	1,330	1,360	1,380	1,510	1,450	1,410	1,40
Total part-time staff	7,720	7,480	7,200	7,490	7,850	7,760	7,620	7,830	8,610	8,240	7,880	7,86
All staff												
Agriculture and Fishing	2,370	2,040	1,610	1,920	2,340	2,060	1,680	2,140	2,390	2,070	1,640	2,22
Manufacturing	2,510	2,420	2,370	2,390	2,420	2,360	2,320	2,350	2,380	2,340	2,310	2,37
Construction and Quarrying	4,170	4,100	4,040	4,190	4,340	4,470	4,600	4,810	4,900	4,810	4,570	4,54
Electricity, Gas and Water	620	620	630	620	610	630	650	650	620	630	640	64
Wholesale and Retail Trades	8,570	8,390	8,180	8,390	8,640	8,550	8,460	8,420	8,750	8,530	8,270	8,22
Hotels, Restaurants & Bars	7,730	6,940	4,670	5,520	7,870	7,160	5,040	5,780	7,970	7,210	5,080	5,86
Transport, Storage & Communication	2,620	2,530	2,350	2,480	2,720	2,680	2,540	2,530	2,880	2,790	2,630	2,62
Computer and related activities	190	200	210	220	230	240	240	240	270	260	260	27
Financial and Legal Activities	10,020	10,150	10,280	10,450	10,610	10,860	11,120	11,360	11,600	12,010	11,840	11,86
Miscellaneous Business Activities	2,020	1,950	1,880	1,950	2,010	2,000	2,000	2,070	2,260	2,240	2,140	2,16
Education, Health and Other Services	3,810	3,720	3,620	3,770	3,930	3,890	3,850	3,950	4,190	4,110	3,980	4,00
Total staff	44,630	43,070	39,840	41,890	45,690	44,900	42,510	44,310	48,190	46,990	43,350	44,81

Appendix 2 - Staff numbers and vacancies

(all businesses, including one-person businesses)

	Staff Numbers						Vacancies					
	Sep-00	Dec-00	Mar-01	Jun-01	Sep-01	Dec-01	Sep-00	Dec-00	Mar-01	Jun-01	Sep-01	Dec-01
Full-time staff												
Agriculture and Fishing	1,750	1,460	1,840	1,990	1,690	1,380	90	170	120	70	70	1
Manufacturing	1,950	1,900	1,790	1,800	1,770	1,770	110	130	180	170	170	1
Construction and Quarrying	4,320	4,250	4,370	4,560	4,670	4,560	320	360	380	360	370	4
Electricity, Gas and Water	610	600	590	590	600	580	50	30	30	40	40	
Wholesale and Retail Trades	6,450	6,320	6,410	6,420	6,380	6,320	540	500	480	490	520	6
Hotels, Restaurants & Bars	5,530	3,750	4,330	5,720	5,130	3,540	360	340	330	300	320	4
Transport, Storage & Communication	2,500	2,360	2,380	2,520	2,480	2,300	150	160	110	110	110	1
Computer and related activities	340	350	360	350	350	350	50	50	50	50	30	
Financial and Legal Activities	10,810	10,890	10,980	11,050	11,380	11,200	930	930	1,030	1,070	960	8
Miscellaneous Business Activities	1,140	1,170	1,160	1,180	1,230	1,130	90	90	90	90	100	1
Education, Health and Other Services	2,770	2,690	2,730	2,860	2,830	2,730	180	190	180	150	160	2
Total full-time staff	38,160	35,750	36,940	39,030	38,500	35,840	2,860	2,940	2,980	2,890	2,850	3,1
Part-time staff												
Agriculture and Fishing	230	180	170	210	210	190	10	10	10	10	0	
Manufacturing	440	390	470	490	520	470	0	10	10	10	10	
Construction and Quarrying	280	280	270	280	280	290	10	10	10	10	10	
Electricity, Gas and Water	20	20	20	20	20	20	0	0	0	0	0	
Wholesale and Retail Trades	1,750	1,670	1,620	1,640	1,640	1,720	170	170	170	160	170	2
Hotels, Restaurants & Bars	1,030	970	890	1,040	1,020	920	30	40	30	40	40	1
Transport, Storage & Communication	380	300	260	350	340	310	30	30	10	10	10	
Computer and related activities	100	90	90	90	90	80	10	0	0	0	0	

Financial and Legal Activities	1,400	1,430	1,420	1,450	1,460	1,410	70	50	50	50	50	
Miscellaneous Business Activities	1,220	1,220	1,230	1,270	1,240	1,180	90	110	80	100	140	2
Education, Health and Other Services	1,580	1,580	1,600	1,690	1,630	1,590	50	70	70	60	30	
Total part-time staff	8,430	8,110	8,050	8,530	8,450	8,180	470	500	450	450	460	7
All staff												
Agriculture and Fishing	1,980	1,640	2,020	2,190	1,900	1,560	90	170	130	80	70	1
Manufacturing	2,390	2,290	2,270	2,290	2,290	2,250	110	140	190	170	180	1
Construction and Quarrying	4,600	4,530	4,640	4,840	4,950	4,850	330	370	390	370	380	4
Electricity, Gas and Water	620	610	610	610	610	600	50	40	40	40	50	
Wholesale and Retail Trades	8,200	7,990	8,030	8,070	8,020	8,040	720	670	660	660	690	8
Hotels, Restaurants & Bars	6,560	4,720	5,220	6,760	6,150	4,460	390	380	370	340	360	5
Transport, Storage & Communication	2,880	2,660	2,640	2,870	2,810	2,610	180	190	120	120	120	1
Computer and related activities	450	440	460	440	440	430	60	50	50	50	30	
Financial and Legal Activities	12,210	12,310	12,400	12,500	12,840	12,610	1,000	980	1,070	1,110	1,000	8
Miscellaneous Business Activities	2,360	2,390	2,390	2,450	2,470	2,310	180	200	170	200	240	3
Education, Health and Other Services	4,350	4,270	4,330	4,550	4,460	4,320	230	260	250	210	180	2
Total staff	46,590	43,850	44,990	47,560	46,950	44,020	3,330	3,440	3,430	3,340	3,310	3,8

Appendix 3 - Residential Qualifications (See Note 4 for definitions) (all businesses, including one-person businesses)

Dec-01				
	Locally qualified	category	Non-locally qualified	Total
Full-time staff				
Agriculture and Fishing	1,010	+	360	1,380
Manufacturing	1,510	10	260	1,770
Construction and Quarrying	3,900	30	630	4,560
Electricity, Gas and Water	540	+	40	580
Wholesale and Retail Trades	5,370	40	910	6,320
Hotels, Restaurants & Bars	2,060	30	1,460	3,540
Transport, Storage & Communication	2,170	10	120	2,300
Computer and related activities	320	10	20	350
Financial and Legal Activities	9,370	350	1,470	11,200
Miscellaneous Business Activities	1,020	10	100	1,130
Education, Health and Other Services	2,270	90	360	2,730
Total full-time staff	29,530	580	5,740	35,840
Part-time staff				
Agriculture and Fishing	160		30	190
Manufacturing	340		130	470
Construction and Quarrying	280		10	290
Electricity, Gas and Water	20		+	20
Wholesale and Retail Trades	1,560		170	1,720
Hotels, Restaurants & Bars	620		290	920
Transport, Storage & Communication	300		10	310
Computer and related activities	80		+	80
Financial and Legal Activities	1,380		30	1,410
Miscellaneous Business Activities	750		440	1,180
Education, Health and Other Services	1,510		80	1,590
Total part-time staff	7,000		1,180	8,180
All staff				
Agriculture and Fishing	1,170	+	390	1,560
Manufacturing	1,850	10	390	2,250

Construction and Quarrying	4,170	30	650	4,850
Electricity, Gas and Water	560	+	40	600
Wholesale and Retail Trades	6,920	40	1,070	8,040
Hotels, Restaurants & Bars	2,680	30	1,750	4,460
Transport, Storage & Communication	2,470	10	120	2,610
Computer and related activities	400	10	20	430
Financial and Legal Activities	10,750	350	1,500	12,610
Miscellaneous Business Activities	1,760	10	540	2,310
Education, Health and Other Services	3,780	90	440	4,320
Total staff	36,520	580	6,920	44,020

[1]

For the purposes of this analysis, the “private sector” includes States Trading Committees, the Financial Services Commission and the Family Nursing and Home Care Service. These bodies, which are subject to the Regulation of Undertakings and Development Law, accounted for a total of 1,480 staff in December 2001.

[2]

The “public sector” cannot be treated as a comparable grouping because it includes certain activities, notably education and health, which are also undertaken to a substantial extent in the private sector.

[3]

The participation rate of the economically active population of working age (men aged 16-64 years; women aged 16-59 years) was measured at the time of the 2001 Census to be 82%, which is 4 percentage points greater than that of the U.K.; Census Bulletin 4, Statistics Unit, Policy and Resources Department, March 2002.

[4]

Short-term variations, largely due to seasonal factors, have been removed from Figures 2 and 3 by calculating a weighted 3-point moving average for each data point; entries for June 1996 and December 2001, therefore, do not appear in the plots.

[5]

The headcount figures shown in Table 1 for the private sector include a small adjustment to those reported by the Manpower Survey in order to account for the more complete recording of one-person undertakings over time. The figures for the public sector also incorporate a small number of estimates for certain departments for which the reported figures were implausible.

[6]

The headcount figures shown in Table 1 for the private sector include a small adjustment to those reported by the Manpower Survey in order to account for the more complete recording of one-person undertakings over time. The figures for the public sector also incorporate a small number of estimates for certain departments for which the reported figures were implausible.

[7]

The International Labour Organisation (ILO) definition of unemployment includes all adults (aged 16 and over) who are looking for or waiting to take up a job, as well as those registered as unemployed.