

MANPOWER REPORT FOR THE PERIOD 1ST JULY 2001 TO 30TH SEPTEMBER 2001

**Presented to the States on 22nd January 2002
by the Industries Committee**



STATES OF JERSEY

STATES GREFFE

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Report

In the 12 months to September 2001 employment in Jersey undertakings was effectively static: full-time employment declined by ten to 37,400, and part-time employment fell by 100 to 8,070. Following the very small changes of -0.4 per cent and -0.9 per cent recorded for the 12 months up to March 2001 and June 2001 respectively, this insignificant decline in full time employment (-0.03 per cent) suggests that the underlying trend in employment in Jersey is flat.

The stability of the numbers in full-time employment, when viewed together with the ongoing low level of registered unemployment (151 at the end of September 2001), suggests that the net outflow of working-age people leaving Jersey, apparent in 1999 and early 2000, has ceased. Furthermore, the decrease of ten in the number of vacancies in the quarter to September (see Figure 3) indicates that the high degree of pressure in the labour market has not eased.

In the third quarter itself, full-time employment decreased by 690, while part-time employment decreased by 150. 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 12month percentage changes are shown in Figure 2.

Figure 1 - Employment in Jersey undertakings

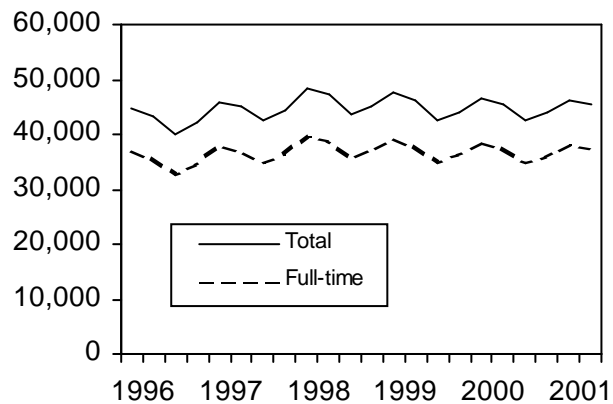


Figure 1b - Underlying trend in Employment
(note: vertical axis does not begin at zero)

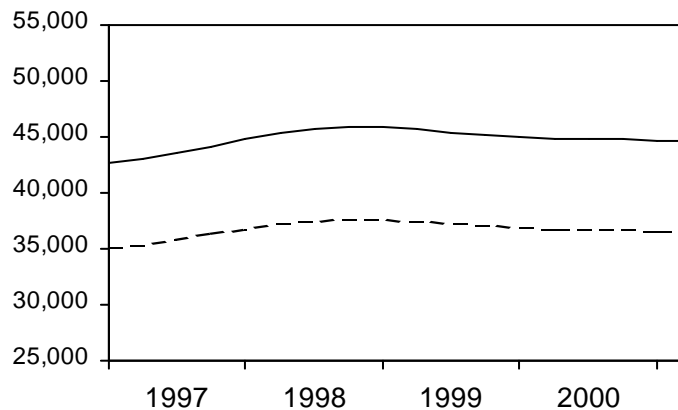
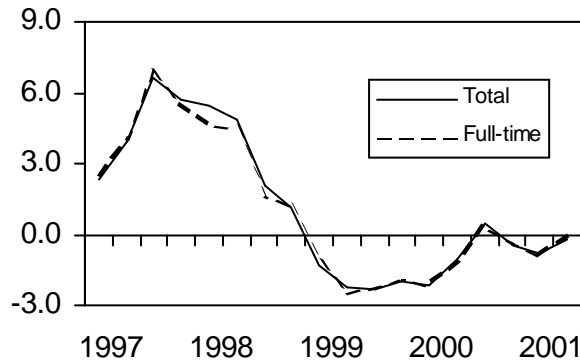


Figure 2 - Twelve-month percentage changes

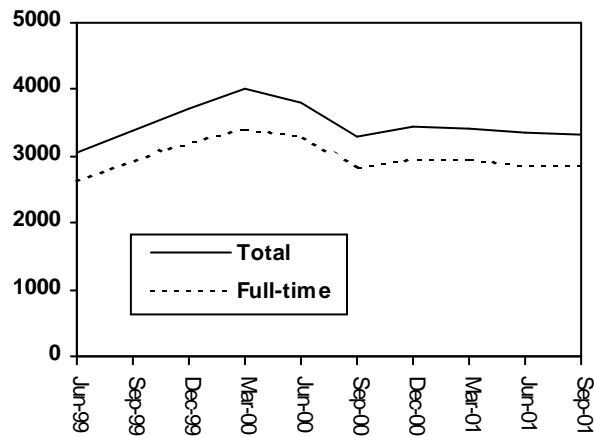


Due to single-person undertakings not being consistently recorded in the past, the above comparisons do not include such enterprises, of which there were 1,320 reported in September 2001, 150 more than a year earlier. Detailed figures excluding single-person undertakings are shown in Appendix 1 and including single-person undertakings in Appendix 2.

Vacancies

Since March 1999 undertakings reporting to the Manpower Survey have provided figures for the number of vacancies they have. It is possible that, in the past, there has been some over-reporting of the number of vacancies because some businesses may have reported vacancies they have no immediate intention of filling. From September 2000, however, the survey form was revised to make clear that only vacancies which businesses were actively seeking to fill should be included. The fall in vacancies in the third quarter of 2000 is thus probably largely attributable to this reporting change; however, the very small reduction of ten vacancies, to give a total of 3,330 for September 2001, shows that the pressure in the labour market was still strong in the third quarter. Vacancies, full and part-time, constituted 7.1 per cent of total employment in June; of these unfilled posts 2,870 were full time.

Figure 3-Unfilled Vacancies



Using as an indicator for a given sector the total number of vacancies as a proportion of employment (including one-person businesses), labour shortages are most severe in miscellaneous business activities (ten per cent), and wholesale and retail trades (nine per cent) sectors. Staff shortages were least evident in the agriculture and fishing, transport and communication, and education and health sectors (all at four per cent).

Sectoral analysis of employment - general

The total number of staff employed in all businesses decreased by 120 over the 12 months to September 2001, with the largest decreases occurring in agriculture and fishing, hotels, restaurants and bars (both at seven per cent) and in manufacturing (five per cent). The computing sector experienced an annual decrease for the first time, of three per cent. In

contrast, there was a second successive six per cent increase in employment in construction and quarrying, and a five per cent increase in financial and legal activities.

Agriculture and fishing

Figure 4a - Employment in Agriculture and fishing

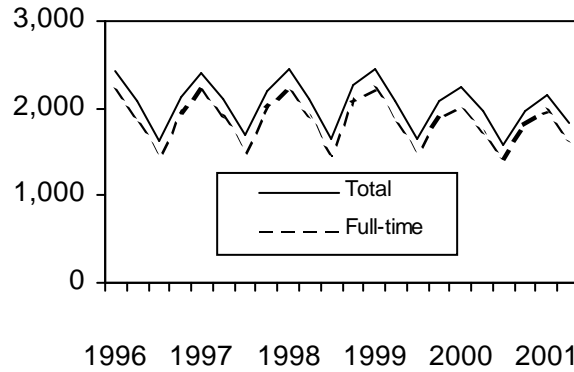


Figure 4b - Underlying trend in Employment
(note: vertical axis does not begin at zero)

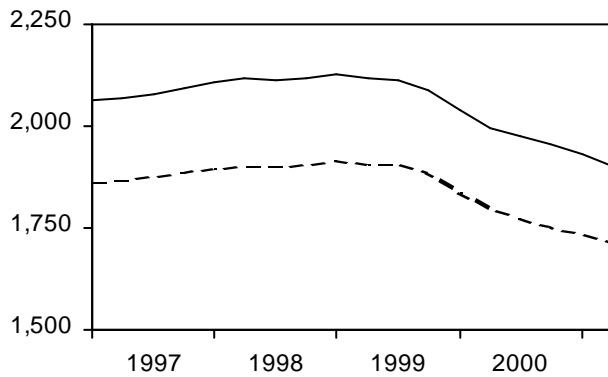
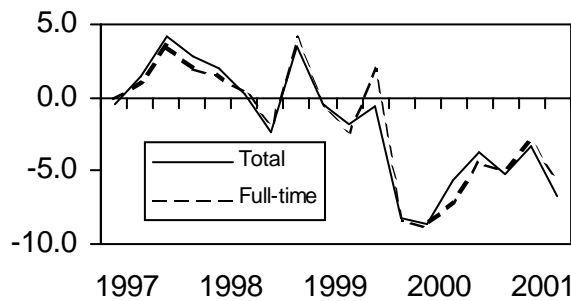


Figure 5 - Twelve-month percentage changes
Agriculture and fishing



Employment in agriculture is highly seasonal, as may be seen in Figure 4a. The peak number employed rose to 2,460 in June 1998, but had fallen to 1,830 by September 2001. Figure 4b illustrates the long-term decline since late 1998; the annual rate of decrease to September was more than five per cent (Figure 5).

Manufacturing

Figure 6 - Employment in Manufacturing

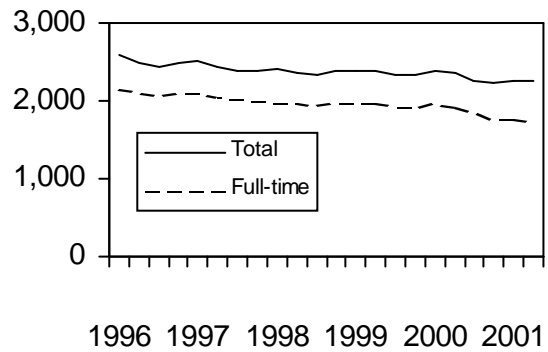
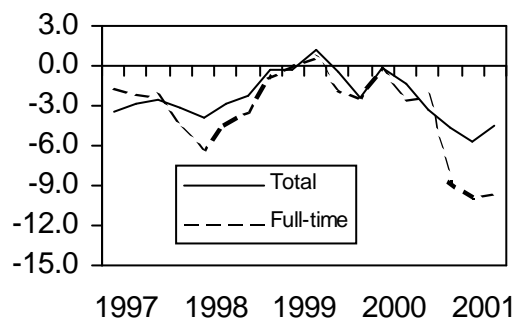


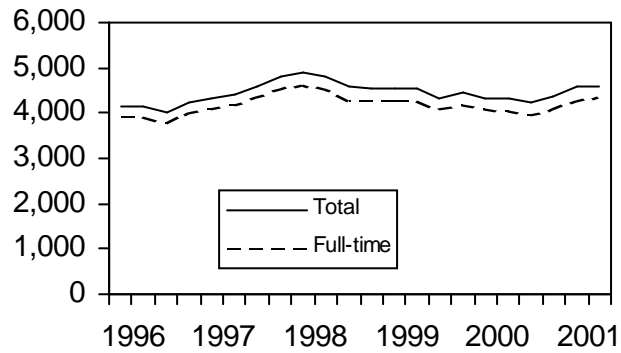
Figure 7 - Twelve-month percentage changes
Manufacturing



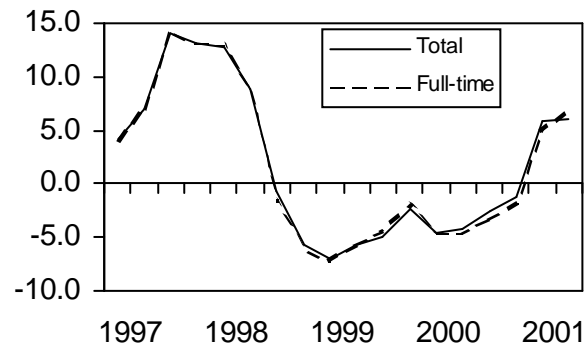
Employment in manufacturing has been declining slowly for several years (Figure 6). The decline continued in the twelve months to September 2001, when the annual rate was 4.5 per cent.

Construction and quarrying

Figure 8 - Employment in Construction and quarrying



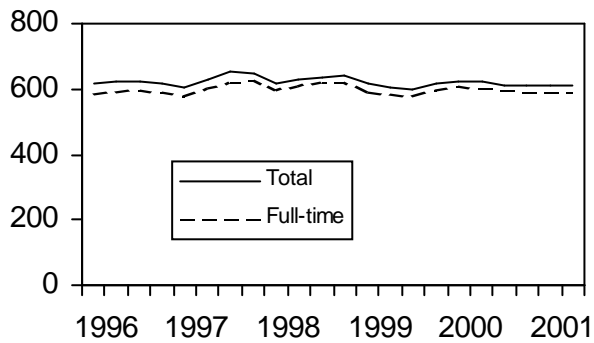
**Figure 9 - Twelve-month percentage changes
Construction and quarrying**



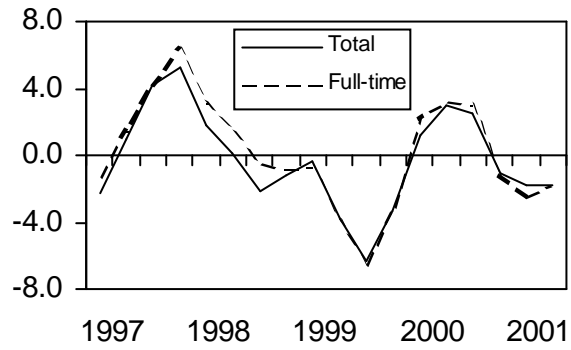
A period of growth in construction employment up to mid-1998 was followed by a decline as major projects were completed (Figure 8). However, following this period of decline in employment, the industry has now recorded a 12-month growth of approximately six per cent for two successive quarters (Figure 9), reflecting a substantial recent increase in activity in this sector.

Electricity, gas and water

Figure 10 - Employment in Electricity, gas and water



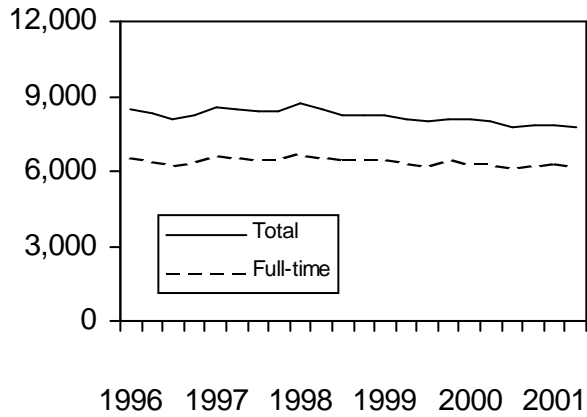
**Figure 11 - Twelve-month percentage changes
Electricity, gas and water**



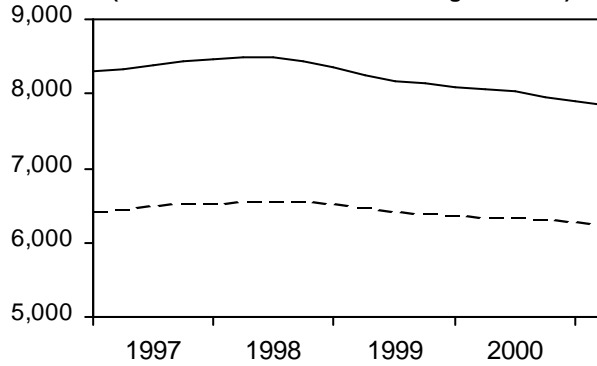
Overall employment in the utilities sector rose a little in 2000, but has remained essentially static over the first three quarters of 2001 (Figure 10). Changes over a 12-month period show a small decline (Figure 11).

Wholesale and retail trades

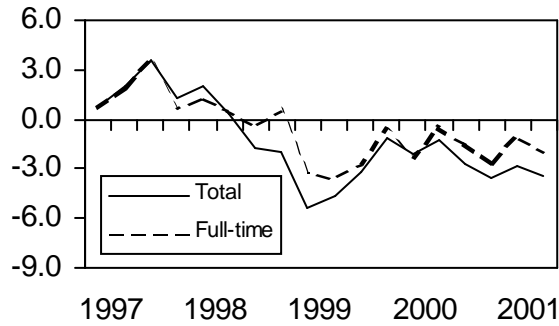
**Figure 12a - Employment in Wholesale and
Retail trades**



**Figure 12b - Underlying trend in Employment
(note: vertical axis does not begin at zero)**



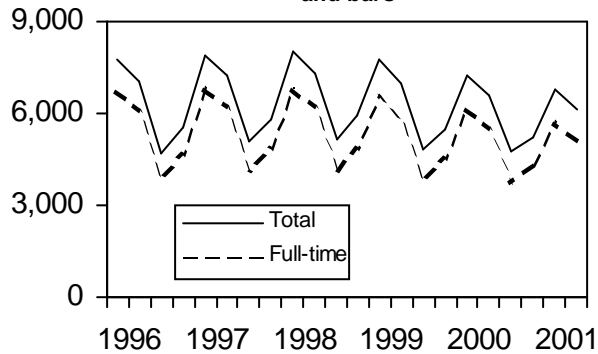
**Figure 13 - Twelve-month percentage changes
Wholesale and retail trades**



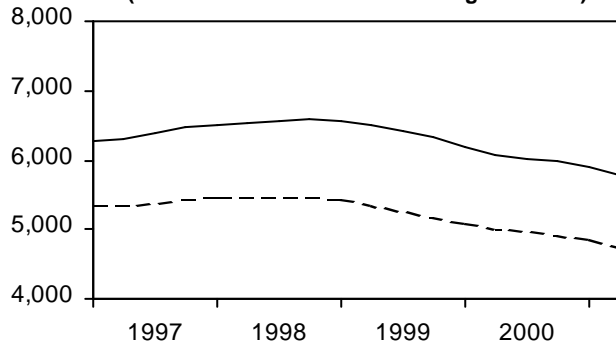
Seasonal factors tend to obscure the growth that occurred in this sector up to mid-1998 (Figure 12a); this growth is apparent in the trend shown by Figure 12b. The latter figure and the pattern of 12-month changes (Figure 13) show that employment in the sector has undergone a continuous decline since that time, at an average annual rate of approximately three per cent.

Hotels, restaurants and bars

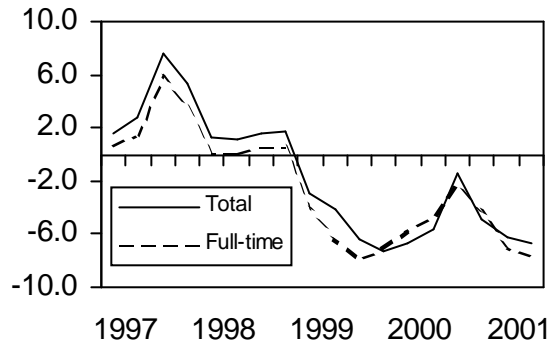
**Figure 14a - Employment in hotels, restaurants
and bars**



**Figure 14b - Underlying trend in Employment
(note: vertical axis does not begin at zero)**



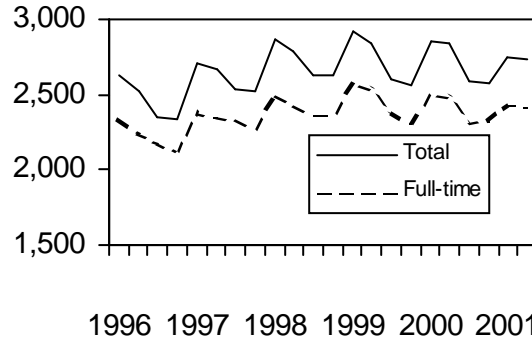
**Figure 15 - Twelve-month percentage changes
Hotels, restaurants and bars**



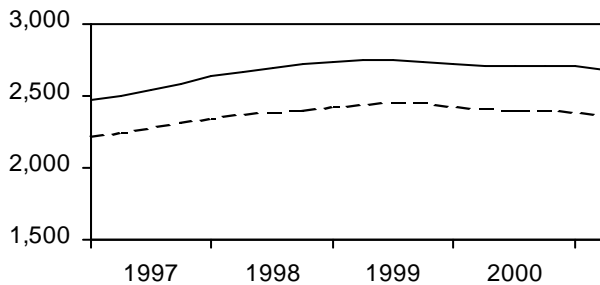
This is the most seasonal of all sectors, with growth of some 3,000 staff between winter and summer (Figure 14a). However the underlying decline in employment in this sector since late 1998 has continued (Figure 14b); the fall of 6.7 per cent observed over the 12 months to September 2001 was the largest for several quarters, and represents a reduction of some 440 staff compared to September 2000.

Transport, storage and communication

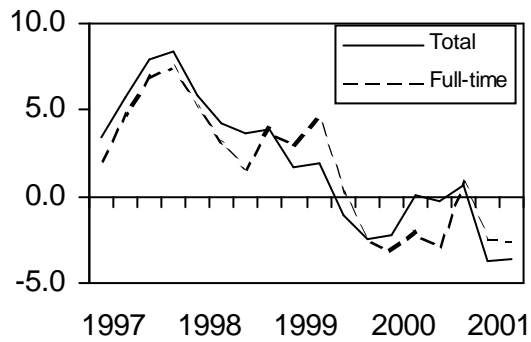
Figure 16a - Employment in Transport, storage and communication



**Figure 16b - Underlying trend in Employment
(note: vertical axis does not begin at zero)**



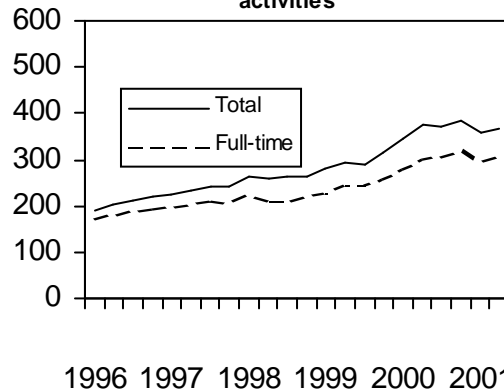
**Figure 17 - Twelve-month percentage changes
Transport, storage and communication**



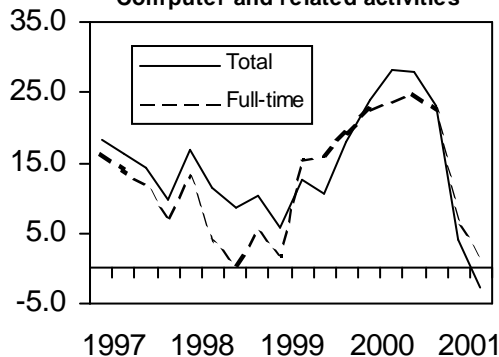
The figures shown for this sector include all the Trading Committees of the States: Harbours and Airport, Jersey Post and Jersey Telecoms. The strong seasonal pattern (Figure 16a) reflects the importance of tourism to road, sea and air transport. After a period in stability in 2000 (Figure 16b), the sector recorded a fall of 3.7 per cent in employment over the year to September 2001 (Figure 17).

Computer and related activities

Figure 18 - Employment in Computer and related activities



**Figure 19 - Twelve-month percentage changes
Computer and related activities**



The computing sector recorded a decline of three per cent in the year to September 2001; the first annual decrease recorded by this sector. However, the total headcount is relatively small, and the decline represents a reduction of only ten staff over the 12 months to September 2001.

Financial and legal activities

Figure 20 - Employment in Financial and legal activities

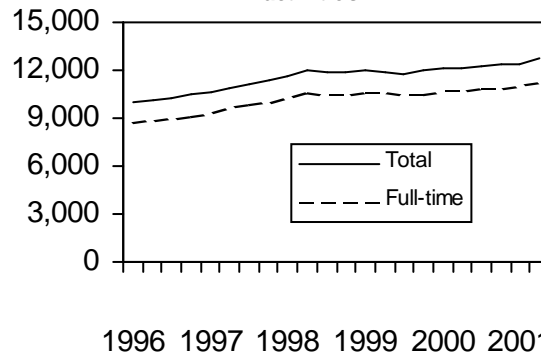
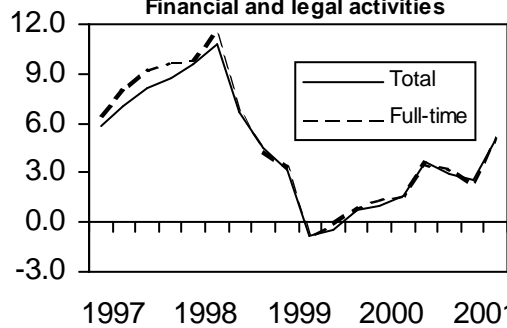


Figure 21 - Twelve-month percentage changes in Financial and legal activities



“Financial Activities” include banking, investment, insurance and accounting. With legal activities also included, employment in the sector passed 10,000 in 1996. There was then rapid growth until 1998 (Figure 20); since that time employment in the sector has grown more slowly. However, the five per cent increase recorded over the 12 months to September 2001 constitutes the largest annual growth for three years. In September 2001, the total headcount stood at 12,730.

Miscellaneous business activities

Figure 22a - Employment in Miscellaneous business activities

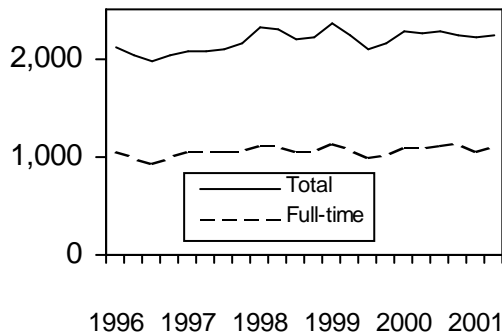
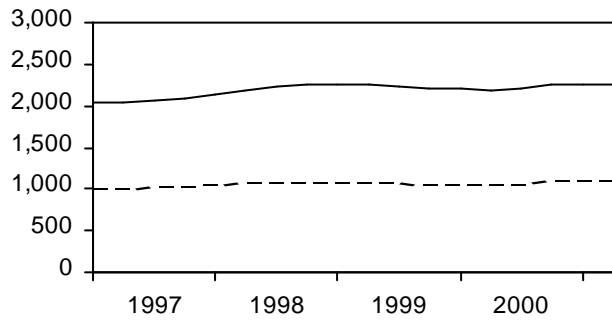
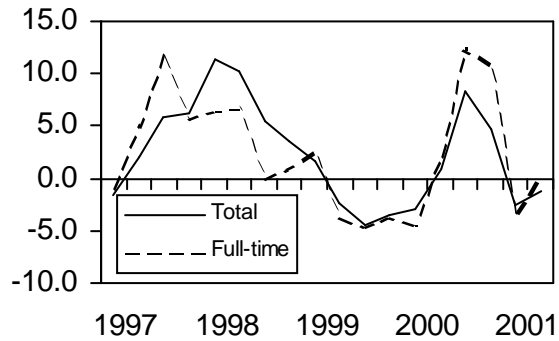


Figure 22b - Underlying trend in Employment



**Figure 23 - Twelve-month percentage changes
Miscellaneous business activities**



This 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 22a. The sector is currently static, after a period of quite rapid growth in 2000 (Figure 23).

Education, health and other services

Figure 24 - Employment in Education, health, and other services

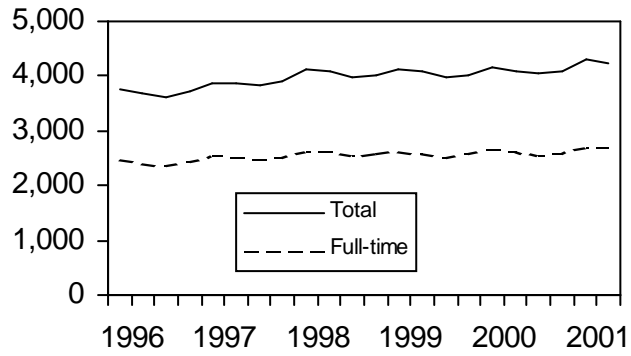
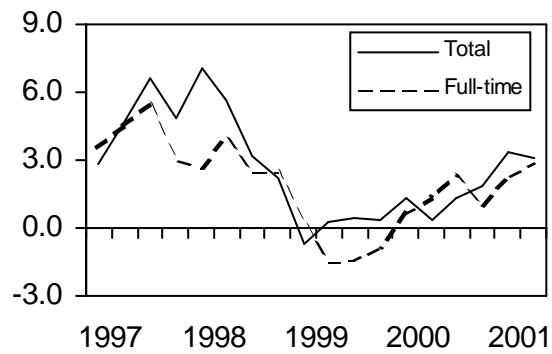


Figure 25 - Twelve-month percentage changes Education, health and other services



This sector comprises only the private sector activities in these fields: general practitioners, dentists, private schools and welfare organisations. The recent trend in employment has been upward (Figure 25), reached a peak of 4,300 in June 2001 (Figure 24) and currently stands at 4,220.

Notes:

1. The Manpower Survey is carried out quarterly and covers over 4,600 undertakings in Jersey employing a total of nearly 47,000 staff at September 2001, including more than 8,000 part time staff (who may have more than one job). The survey is conducted and 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, 4b, 12b, 14b, 16b and 22b are calculated using a weighted moving average over five quarters; the derived average is then assigned to the middle quarter.
3. 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
January 2002

Manpower engaged by sector

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

	<i>Jun-96</i>	<i>Sep-96</i>	<i>Dec-96</i>	<i>Mar-97</i>	<i>Jun-97</i>	<i>Sep-97</i>	<i>Dec-97</i>	<i>Mar-98</i>	<i>Jun-98</i>	<i>Sep-98</i>	<i>Dec-98</i>	<i>Mar-99</i>	<i>Jun-99</i>	<i>Sep-99</i>	<i>Dec-99</i>	<i>Mar-00</i>
Full-time staff																
Agriculture and fishing	2,190	1,880	1,440	1,950	2,190	1,900	1,490	1,990	2,230	1,910	1,460	2,070	2,220	1,860	1,480	1,900
Manufacturing	2,150	2,100	2,070	2,090	2,110	2,060	2,020	2,000	1,980	1,960	1,950	1,980	1,980	1,980	1,920	1,930
Construction and quarrying	3,940	3,910	3,820	4,030	4,100	4,170	4,360	4,560	4,630	4,530	4,290	4,280	4,300	4,270	4,100	4,200
Electricity, gas and water	590	590	600	590	580	600	620	630	600	610	620	620	600	590	580	600
Wholesale and retail trades	6,580	6,430	6,250	6,420	6,630	6,560	6,470	6,460	6,710	6,600	6,450	6,500	6,500	6,360	6,270	6,450
Hotels, restaurants and bars	6,740	6,080	3,880	4,640	6,780	6,160	4,100	4,800	6,780	6,170	4,120	4,830	6,500	5,780	3,800	4,480
Transport, storage and communication	2,330	2,250	2,180	2,120	2,380	2,350	2,330	2,280	2,500	2,430	2,370	2,370	2,570	2,530	2,370	2,310
Computer and related activities	170	180	190	190	200	210	210	210	230	210	210	220	230	250	250	260
Financial and legal activities	8,750	8,870	8,990	9,150	9,320	9,570	9,820	10,040	10,230	10,660	10,470	10,470	10,570	10,570	10,450	10,560
Miscellaneous business activities	1,060	1,000	940	990	1,050	1,050	1,050	1,050	1,120	1,120	1,050	1,060	1,140	1,080	1,000	1,020
Education, health and other services	2,480	2,420	2,360	2,460	2,570	2,530	2,490	2,540	2,640	2,630	2,550	2,600	2,640	2,590	2,510	2,580
Total full-time staff	36,980	35,700	32,700	34,640	37,900	37,150	34,960	36,540	39,640	38,820	35,530	37,000	39,250	37,840	34,730	36,290
Part-time staff																
Agriculture and fishing	230	200	190	180	220	210	210	200	230	210	200	200	230	220	160	180
Manufacturing	440	400	370	380	390	370	360	400	420	400	380	410	420	410	410	400
Construction and quarrying	230	220	220	230	250	250	250	260	270	270	280	260	260	260	240	240
Electricity, gas and water	30	30	30	30	20	30	30	20	20	20	20	20	20	20	20	20
Wholesale and retail trades	1,910	1,880	1,860	1,860	1,930	1,930	1,920	1,920	2,010	1,910	1,810	1,710	1,750	1,750	1,720	1,670
Hotels, restaurants and bars	1,050	930	830	890	1,130	1,040	960	1,020	1,230	1,120	1,020	1,090	1,270	1,210	1,020	1,010
Transport, storage and communication	290	280	170	210	330	320	200	250	370	360	260	260	350	310	230	250
Computer and related activities	20	20	20	20	30	30	30	30	40	50	50	50	50	50	50	50

Manpower engaged by sector (cont'd)

(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	Jun-99	Sep-99	Dec-99	Mar-00
Part-time staff (cont'd)																
Financial and legal activities	1,270	1,290	1,300	1,300	1,300	1,300	1,300	1,330	1,390	1,380	1,390	1,400	1,410	1,360	1,360	1,400
Miscellaneous business activities	1,050	1,040	1,030	1,030	1,030	1,030	1,040	1,100	1,200	1,180	1,150	1,160	1,210	1,160	1,100	1,130
Education, health and other services	1,280	1,260	1,250	1,270	1,290	1,320	1,360	1,380	1,500	1,440	1,420	1,410	1,460	1,490	1,470	1,440
Total part-time staff	7,790	7,570	7,270	7,400	7,910	7,830	7,660	7,900	8,670	8,330	7,970	7,960	8,430	8,250	7,770	7,790
All staff																
Agriculture and fishing	2,420	2,080	1,630	2,130	2,410	2,110	1,700	2,190	2,460	2,120	1,660	2,270	2,450	2,080	1,650	2,080
Manufacturing	2,590	2,500	2,440	2,480	2,500	2,430	2,380	2,400	2,400	2,360	2,330	2,390	2,400	2,390	2,320	2,330
Construction and quarrying	4,170	4,130	4,040	4,260	4,340	4,420	4,600	4,810	4,900	4,810	4,570	4,540	4,560	4,530	4,340	4,430
Electricity, gas and water	620	620	630	620	610	630	650	650	620	630	640	640	610	610	600	620
Wholesale and retail trades	8,490	8,320	8,110	8,270	8,550	8,480	8,400	8,380	8,730	8,510	8,250	8,210	8,260	8,110	7,990	8,120
Hotels, restaurants and bars	7,780	7,010	4,700	5,520	7,910	7,210	5,060	5,820	8,010	7,290	5,140	5,920	7,770	6,990	4,810	5,490
Transport, storage and communication	2,620	2,530	2,350	2,330	2,710	2,670	2,540	2,530	2,870	2,790	2,630	2,630	2,920	2,840	2,600	2,560
Computer and related activities	190	200	210	220	230	230	240	240	260	260	260	270	280	290	290	310
Financial and legal activities	10,020	10,160	10,290	10,450	10,610	10,870	11,120	11,360	11,630	12,030	11,860	11,880	11,990	11,930	11,810	11,970
Miscellaneous business activities	2,110	2,040	1,970	2,020	2,080	2,080	2,090	2,150	2,310	2,290	2,200	2,220	2,350	2,240	2,100	2,150
Education, health and other services	3,760	3,680	3,610	3,730	3,860	3,850	3,840	3,920	4,140	4,070	3,970	4,000	4,110	4,080	3,990	4,020
Total staff	44,770	43,270	39,970	42,030	45,810	44,980	42,620	44,440	48,320	47,150	43,510	44,960	47,680	46,090	42,500	44,080

Note: Figures are rounded independently to the nearest 10.

Staff numbers and vacancies

(all businesses, including one-person businesses)

	<i>Staff numbers</i>					<i>Vacancies</i>					<i>Vacancies as per cent of staff employed</i>				
	<i>Sep-00</i>	<i>Dec-00</i>	<i>Mar-01</i>	<i>Jun-01</i>	<i>Sep-01</i>	<i>Sep-00</i>	<i>Dec-00</i>	<i>Mar-01</i>	<i>Jun-01</i>	<i>Sep-01</i>	<i>Sep-00</i>	<i>Dec-00</i>	<i>Mar-01</i>	<i>Jun-01</i>	<i>Sep-01</i>
Full-time staff															
Agriculture and fishing	1,780	1,480	1,860	2,020	1,690	90	170	120	70	70	4.8	11.2	6.3	3.7	4.0
Manufacturing	1,960	1,910	1,800	1,810	1,770	110	130	180	170	170	5.6	6.9	10.2	9.2	9.6
Construction and quarrying	4,320	4,230	4,370	4,550	4,610	320	360	380	360	380	7.5	8.4	8.7	7.9	8.2
Electricity, gas and water	610	600	590	590	600	50	30	30	40	40	8.3	5.5	5.6	6.4	7.2
Wholesale and retail trades	6,450	6,320	6,410	6,430	6,340	520	490	460	490	520	8.1	7.7	7.2	7.6	8.3
Hotels, restaurants and bars	5,530	3,740	4,320	5,710	5,110	360	340	340	300	340	6.5	9.0	7.8	5.2	6.6
Transport, storage and communication	2,530	2,360	2,380	2,490	2,470	150	160	110	110	110	5.7	6.8	4.5	4.2	4.4
Computer and related activities	380	300	270	320	340	30	30	10	10	10	13.4	14.0	14.9	12.9	8.9
Financial and legal activities	10,820	10,900	11,000	11,060	11,370	930	930	1,030	1,070	960	8.6	8.5	9.3	9.7	8.4
Miscellaneous business activities	1,190	1,220	1,230	1,150	1,200	90	120	90	90	100	7.3	9.5	7.0	7.8	8.1
Education, health and other services	2,730	2,680	2,700	2,820	2,810	180	190	180	150	160	6.7	7.1	6.7	5.2	5.5
Total full-time staff	38,240	35,780	37,010	38,980	38,310	2,840	2,960	2,970	2,880	2,870	7.4	8.3	8.0	7.4	7.5
Part-time staff															
Agriculture and fishing	240	180	180	210	210	10	10	10	10	0	2.0	3.9	6.8	2.8	1.4
Manufacturing	440	390	470	490	520	0	10	10	10	10	0.9	1.3	1.1	1.4	1.5
Construction and quarrying	280	280	280	320	280	10	10	10	10	10	2.9	3.6	2.5	2.5	2.9
Electricity, gas and water	20	20	20	20	20	0	0	0	0	0	17.6	18.8	11.8	11.8	11.8
Wholesale and retail trades	1,750	1,670	1,620	1,640	1,620	150	160	160	160	170	8.6	9.5	9.7	9.9	10.2
Hotels, restaurants and bars	1,090	1,050	940	1,110	1,080	30	40	40	40	40	2.3	4.0	4.0	3.8	3.8
Transport, storage and communication	380	300	270	320	340	30	30	10	10	10	8.7	9.9	3.4	3.4	3.0
Computer and related activities	100	90	90	90	80	10	0	0	0	0	8.9	3.3	0.0	3.4	3.6
Financial and legal activities	1,420	1,450	1,440	1,480	1,490	70	50	50	50	40	4.6	3.5	3.3	3.2	3.0
Miscellaneous business activities	1,230	1,220	1,190	1,250	1,210	90	110	80	100	140	7.7	9.1	6.7	8.0	11.9
Education, health and other services	1,570	1,570	1,600	1,700	1,640	50	70	70	60	30	3.3	4.4	4.6	3.7	1.7
Total part-time staff	8,520	8,210	8,090	8,620	8,480	450	490	430	450	460	5.3	6.0	5.3	5.2	5.4
All staff															
Agriculture and fishing	2,020	1,660	2,030	2,230	1,900	90	170	130	80	70	4.4	10.4	6.3	3.6	3.7
Manufacturing	2,390	2,300	2,270	2,300	2,290	110	140	190	170	180	4.7	5.9	8.3	7.6	7.8
Construction and quarrying	4,600	4,510	4,640	4,870	4,890	330	370	390	370	390	7.2	8.1	8.3	7.5	7.9
Electricity, gas and water	620	610	610	610	610	50	40	40	40	50	8.5	5.9	5.7	6.6	7.4
Wholesale and retail trades	8,200	7,990	8,040	8,070	7,960	670	650	620	650	690	8.2	8.1	7.7	8.1	8.7
Hotels, restaurants and bars	6,620	4,790	5,250	6,820	6,180	390	380	370	340	380	5.8	7.9	7.1	5.0	6.1
Transport, storage and communication	2,910	2,660	2,650	2,820	2,810	180	190	120	120	120	6.1	7.2	4.4	4.1	4.3
Computer and related activities	450	440	450	440	430	60	50	50	50	30	12.4	11.8	11.9	11.0	7.9

activities															
Financial and legal	12,240	12,350	12,440	12,540	12,860	1,000	980	1,080	1,120	1,000	8.1	7.9	8.6	8.9	7.8
activities															
Miscellaneous	2,410	2,440	2,420	2,390	2,410	180	230	170	190	240	7.5	9.3	6.9	7.9	10.0
business activities															
Education, health and	4,290	4,250	4,300	4,520	4,450	230	260	260	210	180	5.5	6.1	5.9	4.7	4.1
other services															
Total staff	46,760	44,000	45,100	47,600	46,790	3,290	3,450	3,400	3,340	3,330	7.0	7.8	7.5	7.0	7.1