

MANPOWER REPORT FOR THE PERIOD 1ST JULY 1999 TO 30TH SEPTEMBER 1999

**Presented to the States on 21st March 2000
by the Industries Committee**



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REPORT

The analysis of the manpower survey returns for September 1999 shows that full-time employment in Jersey undertakings fell by 1,350 during the three months to September 1999 to 36,580, and part-time employment fell by 210 to 8,180.

Figure 1 - Employment in Jersey undertakings

Although some of the decline can be attributed to seasonal factors, as can be seen from Figure 1, the change over 12 months (Figure 2) shows a decline of 1,000 in full-time employment and 160 in part-time employment.

Figure 2 - Twelve-month changes in employment

These comparisons do not include single-person undertakings, of which there were 950 reported in September 1999, because they have not been consistently recorded in the past. They also exclude employees of Jersey Harbours, Jersey Post and Jersey Telecoms, which reported for the first time in September, when they together had 920 full-time and 50 part-time staff.

Sectoral analysis - general

Different patterns are evident when the total is broken down into broad sectors. Although most sectors saw a small reduction in the total number of staff over the 12 months to September, numbers fell more steeply in construction (minus six per cent), electricity, gas and water (minus four per cent), hotels and restaurants (minus three per cent), transport, storage and communication (minus three per cent) and wholesale and retail trades (minus five per cent). In contrast, there was a one per cent increase in employment in manufacturing and an 11 per cent increase in computer and related activities. The computer sector is still quite small, however, with a total employment of some 440 staff.

Agriculture and fishing

Figure 3

Figure 4

Employment in agriculture is highly seasonal, as may be seen in Figure 3, and the peak number employed has been rising in recent years, to 2,630 in June 1999. The fall to September 1999, however, was steeper than usual, and the 12-month change to September (Figure 4) shows a reduction of 20 staff.

Manufacturing

Figure 5

Figure 6

Employment in manufacturing has been declining slowly for several years (Figure 5). In the last few quarters, however, the 12-month change (Figure 6) indicates that it has levelled off and may now be expanding a little. A growth area within manufacturing is brewing.

Construction and quarrying

Figure 7

Figure 8

A period of growth in construction employment up to mid-1988 was followed by a small decline (Figure 7), but employment throughout 1999 has been relatively stable. 12-month changes (Figure 8) reflect past rather than recent developments.

Electricity, gas and water

Figure 9

Figure 10

A small seasonal pattern in the utilities sector conceals a slow downward trend (Figure 9). The 12-month comparison (Figure 10) shows the reduction of about 30 staff which has occurred, primarily in the electricity sector, in 1999.

Wholesale and retail trades

Figure 11

Figure 12

Seasonal factors also tend to obscure the growth that occurred in this sector up to June 1998 (Figure 11). In the last year, however, a substantial reduction has occurred, particularly in part-time employment (Figure 12), reportedly through difficulties in recruitment.

Hotels and restaurants

Figure 13

Figure 14

The most seasonal of all sectors, with growth of some 3,000 staff between winter and summer. The underlying increase in employment that occurred up to late 1998 is nevertheless apparent (Figure 13). In 1999, however, recruitment difficulties and reduced demand led to a significant drop in full-time employment: some 330 full-time staff in the year to September 1999 (Figure 14). Part-time working rose a little, by some 80 staff, in the same period, resulting in a net reduction of 250.

Transport, storage and communication

Figure 15

Figure 16

In order to maintain consistency over time, the figures shown for this sector do not include those for the Trading Committees of the States of Jersey: Harbours and Airport, Postal Administration and Telecommunications, which have only recently started providing figures to the quarterly manpower survey. The strong seasonal pattern (Figure 15) reflects the importance of tourism to road, sea and air transport. In 1999, as in other tourism-related sectors, employment declined, but in this sector the decline, of some 60 staff, was confined to part-time employees (Figure 16).

Computer and related activities

Figure 17

Figure 18

Computing is a sector which has almost doubled in size since 1996, from 240 to 440 staff (Figure 17). The annual rate of growth slackened in early 1998, but recovered (Figure 18), before falling again in the period to September 1999. The growth rate continues above ten per cent a year, however.

Financial and legal activities

Figure 19

Figure 20

“Financial activities” include banking, investment, insurance and accounting. With legal activities also included, employment in the sector passed 10,000 in 1996 (Figure 19). Growth continued, but at a decreasing rate, until the year to September 1999 (Figure 20), when a decrease of about 210 staff was apparent in banking, investment, insurance and accounting, partly offset by an increase of some 80 staff in legal businesses.

Miscellaneous business activities

Figure 21

Figure 22

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 21. The 12-month changes (Figure 22) show increasing growth until mid-1998 and then a slowing of the increase and a small decline in the year to September 1999.

Education, health and other services

Figure 23

Figure 24

This sector comprises only the private activities in these fields: general practitioners, dentists, private schools and welfare organisations. As in most sectors, the trend in employment has been slowly upward from 1996 to early 1999 (Figure 23). The rate of growth became slower in 1998, however, and turned into a decline in the 12 months to June 1999, sustained in the period to September (Figure 24).

Notes:

1. The manpower survey is carried out quarterly and covers some 4,400 undertakings in Jersey employing a total of 46,700 staff, including 9,000 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. Further information is available from the Statistics Unit, telephone 603400. 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
February 2000

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>Δ</i>
Full-time staff												
Agriculture and fishing	2,310	2,010	1,570	2,070	2,290	2,020	1,620	2,130	2,340	2,040	1,570	2
Manufacturing	2,120	2,070	2,040	2,050	2,060	2,020	2,000	1,980	1,960	1,940	1,930	1
Construction and quarrying	3,880	3,840	3,760	3,950	4,030	4,110	4,290	4,480	4,560	4,440	4,180	4
Electricity, gas and water	590	590	600	590	580	600	620	630	600	610	620	
Wholesale and retail trades	6,490	6,310	6,150	6,110	6,520	6,440	6,380	6,350	6,620	6,450	6,310	6
Hotels, restaurants and bars	6,710	6,020	3,870	4,550	6,750	6,100	4,080	4,720	6,750	6,100	4,100	4
Transport, storage and communication	1,340	1,300	1,150	1,170	1,370	1,320	1,190	1,210	1,400	1,340	1,180	1
Computer and related activities	250	260	260	280	290	300	310	310	320	350	340	
Financial and legal activities	8,580	8,690	8,810	8,960	9,120	9,370	9,610	9,840	10,010	10,430	10,250	10
Miscellaneous business activities	1,150	1,100	1,050	1,120	1,190	1,180	1,180	1,180	1,260	1,270	1,200	1
Education, health and other services	2,470	2,460	2,350	2,420	2,560	2,550	2,480	2,530	2,620	2,610	2,530	2
Total full-time staff	35,890	34,640	31,610	33,270	36,750	36,020	33,760	35,330	38,450	37,580	34,210	35
Part-time staff												
Agriculture and fishing	240	210	200	180	220	220	210	200	230	210	200	
Manufacturing	470	420	400	410	410	400	390	420	450	420	400	
Construction and quarrying	220	220	220	230	240	240	240	250	270	270	280	
Electricity, gas and water	30	30	30	30	20	30	30	20	20	20	20	
Wholesale and retail trades	1,890	1,870	1,850	1,850	1,910	1,910	1,910	1,910	2,000	1,920	1,810	1
Hotels, restaurants and bars	1,040	930	820	860	1,120	1,040	960	990	1,220	1,120	1,020	1
Transport, storage and communication	270	250	140	190	300	290	170	220	330	320	210	
Computer and related activities	30	30	30	30	30	30	40	40	40	50	60	
Financial and legal activities	1,280	1,270	1,290	1,280	1,280	1,290	1,290	1,320	1,380	1,360	1,380	1
Miscellaneous business activities	1,050	1,040	1,030	1,020	1,020	1,030	1,030	1,090	1,190	1,170	1,140	1
Education, health and	1,270	1,250	1,240	1,260	1,310	1,340	1,380	1,410	1,530	1,470	1,400	1

other services												
Total part-time staff	7,750	7,520	7,230	7,330	7,880	7,800	7,640	7,870	8,660	8,340	7,930	7
All staff												
Agriculture and fishing	2,540	2,220	1,760	2,250	2,510	2,230	1,830	2,330	2,580	2,250	1,780	2
Manufacturing	2,580	2,490	2,440	2,460	2,480	2,420	2,390	2,400	2,410	2,360	2,330	2
Construction and quarrying	4,110	4,060	3,980	4,180	4,270	4,350	4,540	4,730	4,820	4,710	4,460	4
Electricity, gas and water	620	620	630	620	610	630	650	650	620	630	640	
Wholesale and retail trades	8,380	8,180	8,000	7,950	8,430	8,360	8,290	8,260	8,630	8,380	8,120	7
Hotels, restaurants and bars	7,760	6,950	4,690	5,410	7,870	7,130	5,040	5,710	7,980	7,220	5,120	5
Transport, storage and communication	1,610	1,550	1,290	1,360	1,670	1,610	1,360	1,430	1,730	1,660	1,400	1
Computer and related activities	270	280	290	310	320	330	340	340	360	400	400	
Financial and legal activities	9,840	9,960	10,090	10,250	10,400	10,650	10,900	11,150	11,390	11,790	11,630	11
Miscellaneous business activities	2,200	2,140	2,070	2,140	2,210	2,210	2,210	2,270	2,450	2,440	2,340	2
Education, health and other services	3,740	3,710	3,590	3,680	3,870	3,890	3,860	3,940	4,150	4,080	3,930	4
Total	43,640	42,160	38,840	40,600	44,630	43,820	41,410	43,200	47,100	45,920	42,140	43