

**MANPOWER REPORT FOR THE PERIOD 1ST JULY 2000 TO  
30TH SEPTEMBER 2000**

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**Presented to the States on 30th January 2001  
by the Industries Committee**

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**STATES OF JERSEY**

**STATES GREFFE**

150

2001

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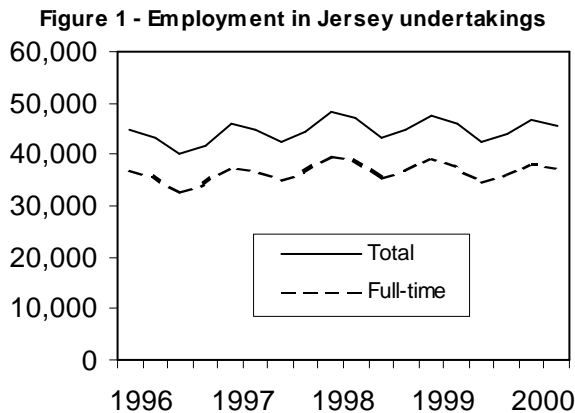
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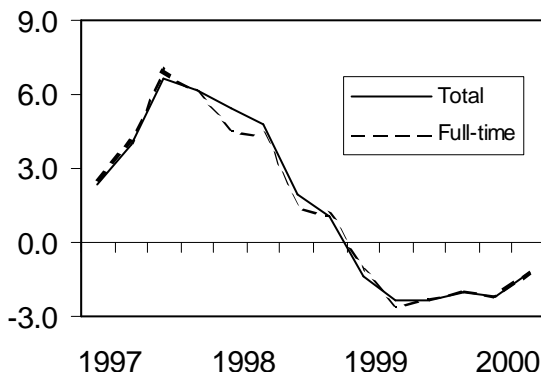
## REPORT

The analysis of the Manpower Survey returns for September 2000 shows that in the 12 months to September, full-time employment in Jersey undertakings fell by 450 to 37,340, and part-time employment fell by 90 to 8,140. Thus, the underlying trend in employment in Jersey continued downward in the third quarter of 2000 at a rather lower rate than the preceding four quarters.

The continued fall in full-time employment, when viewed together with the ongoing low level of registered unemployment (146 at the end of September 2000), suggests that there was still a net outflow of working age people leaving Jersey, but the falling number of vacancies (see below) suggests that the high degree of pressure on the labour market eased a little in the third quarter of 2001.

In the third quarter itself, full-time employment decreased by 990, while part-time employment decreased by 160. These short-term decreases, however, are largely attributable to seasonal factors, as can be seen from Figure 1. Figure 2 shows the underlying trend.



**Figure 2 - Twelve-month percentage changes**

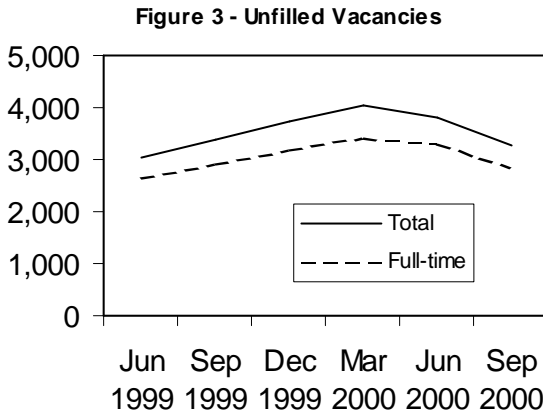
Because they have not been consistently recorded in the past, these comparisons do not include single-person undertakings, of which there were 1,130 reported in September 2000, 150 more than a year earlier. It is likely that some of this increase of 150 indicates a small rise in the total number of one-person businesses. 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 has been revised to make clear that only vacancies which businesses are actively seeking to fill should be included. The reduction of 520 vacancies in the quarter to September 2000 probably reflects a fall associated with this change in reporting in addition to a genuine decrease in vacancies. It will be another year before the effects of the reporting change will be entirely eliminated.

With these reservations, the figures show a decline of 110 vacancies over the 12 months to September 2000, when there were 3,280 vacancies in total. This represents 2,840 full-time and 440 part-time unfilled posts. In

the third quarter itself, total vacancies fell by 14 per cent from the June 2000 figure of 3,800.



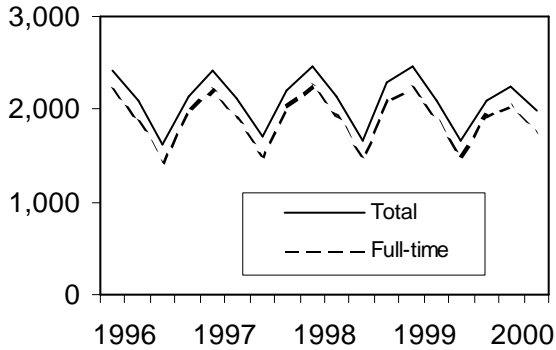
Using total vacancies as a proportion of employment in the sector (including one-person businesses) as an indicator, labour shortages are still most severe in the computing sector (12 per cent), followed by electricity, gas and water (nine per cent) and miscellaneous business activities, financial and legal activities and wholesale and retail trades (all eight per cent). Staff shortages were least evident in agriculture and fishing and manufacturing (both four per cent).

### **Sectoral analysis of employment - general**

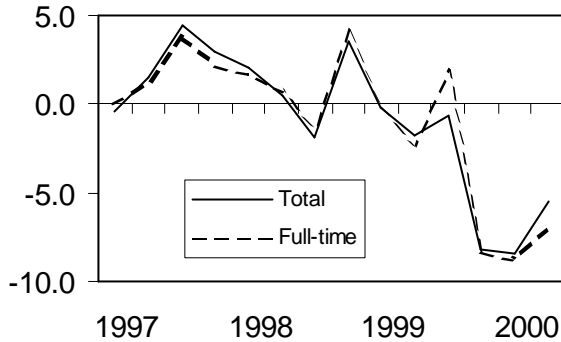
The total number of staff decreased by 550 over the 12 months to September 2000, with the largest decreases in agriculture and fishing (minus six per cent) and hotels, restaurants and bars (minus six per cent). In contrast, there was a 17 per cent increase in computer and related activities and small changes in most other sectors. The computer sector is still quite small, however, with a total employment of some 570 staff, including 60 in one-person undertakings.

## Agriculture and fishing

**Figure 4 - Employment in Agriculture and fishing**



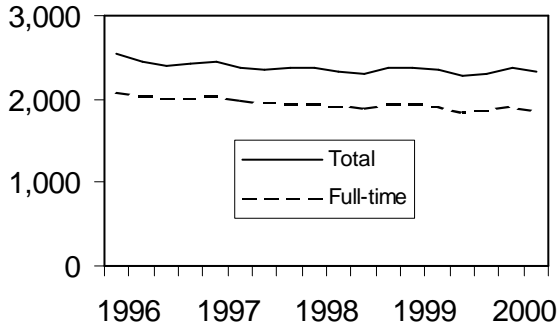
**Figure 5 - Twelve-month percentage changes  
Agriculture and fishing**



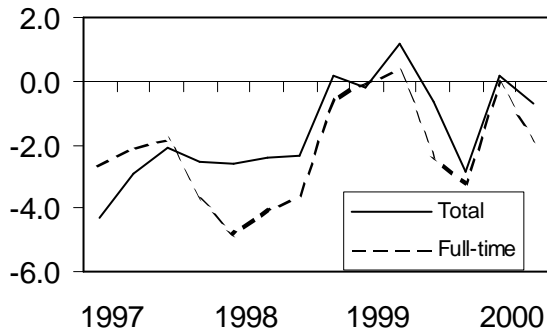
Employment in agriculture is highly seasonal, as may be seen in Figure 4, and the peak number employed rose in recent years, to 2,460 in June 1999. As in the previous two quarters, the 12-month change to September 2000 (Figure 5) shows a decrease, this time of six per cent, although the rate of decrease has slowed a little in the latest quarter.

## Manufacturing

**Figure 6 - Employment in Manufacturing**



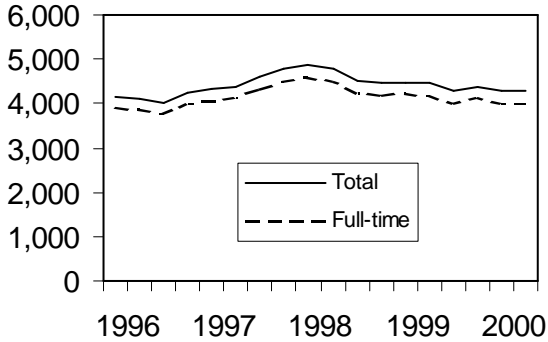
**Figure 7 - Twelve-month percentage changes  
Manufacturing**



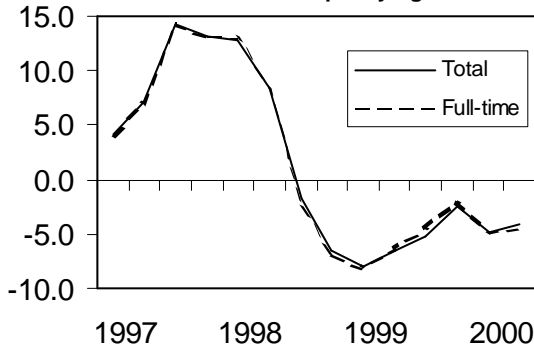
Employment in manufacturing has been declining slowly for several years (Figure 6). In the last two or three years, however, it seems to have stabilised between 2,300 and 2,400.

## Construction and quarrying

**Figure 8 - Employment in Construction and quarrying**



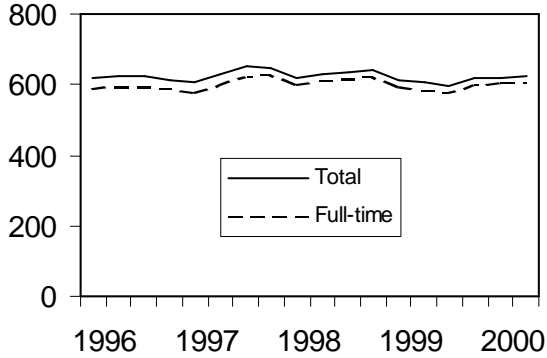
**Figure 9 - Twelve-month percentage changes  
Construction and quarrying**



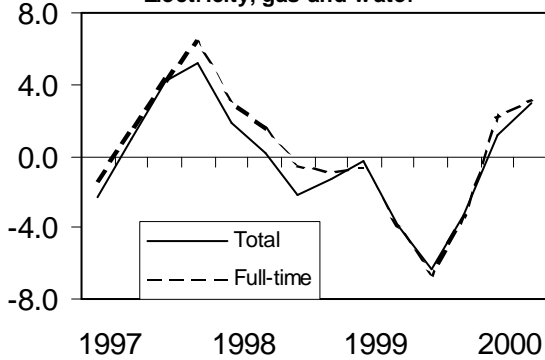
A period of growth in construction employment up to mid-1998 was followed by a similar decline as major projects were completed (Figure 8). The industry is now showing an annual decline of around five per cent (Figure 9).

## Electricity, gas and water

**Figure 10 - Employment in Electricity, gas and water**



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

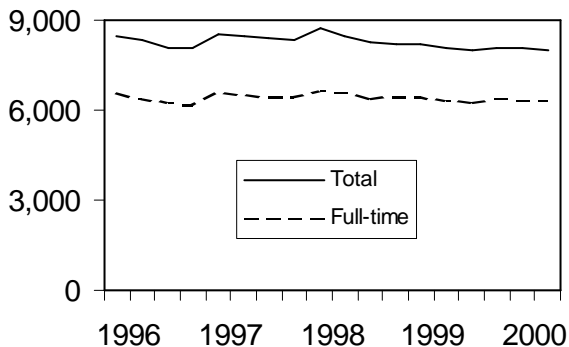


A small seasonal pattern in the utilities sector conceals a downward trend through 1999 (Figure 10). The 12-month comparison (Figure 11) shows that staff numbers have risen slightly during the year 2000.

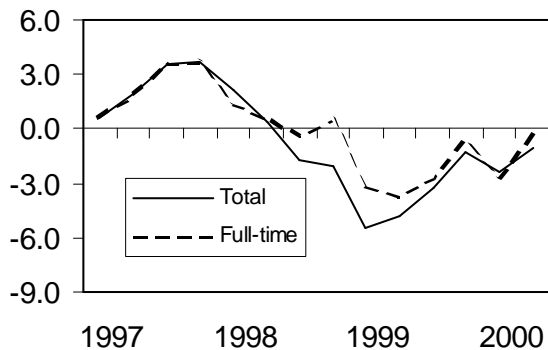


## Wholesale and retail trades

**Figure 12 - Employment in Wholesale and retail trades**



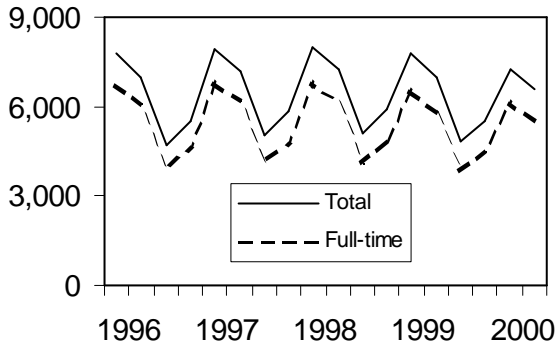
**Figure 13 - Twelve-month percentage changes Wholesale and retail trades**



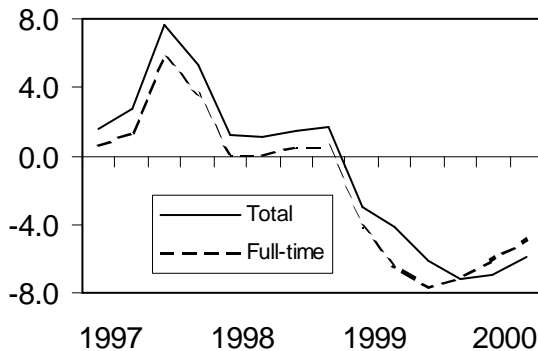
Seasonal factors tend to obscure the growth that occurred in this sector up to June 1998 (Figure 12). The pattern of 12-month changes, however, (Figure 13), suggests that employment in the sector has been declining since that time.

## Hotels, restaurants and bars

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



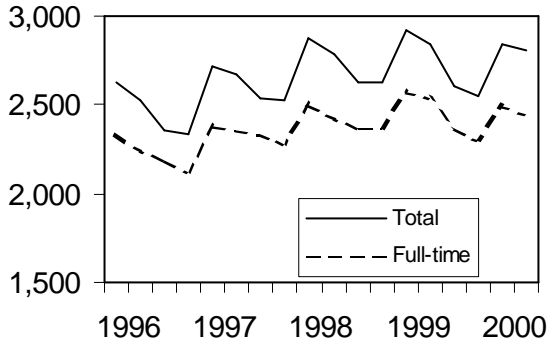
**Figure 15 - Twelve-month percentage changes  
Hotels, restaurants and bars**



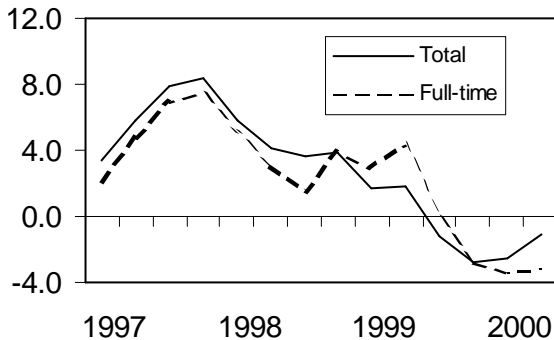
This is the most seasonal of all sectors, with growth of some 3,000 staff between winter and summer. The underlying increase in employment that occurred up to late 1998 is nevertheless apparent (Figure 15). In 1999, however, recruitment difficulties and reduced demand led to a significant drop in full-time employment, and this decline has continued with a fall of some 280 full-time staff in the year to September 2000 (Figure 14). Part-time working also fell, by some 130 staff, in the same period, resulting in a net reduction of 410.

## Transport, storage and communication

**Figure 16 - Employment in Transport, storage and communication**



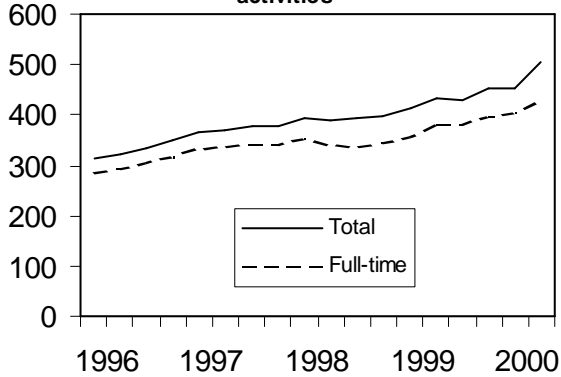
**Figure 17 - Twelve-month percentage changes Transport, storage and communication**



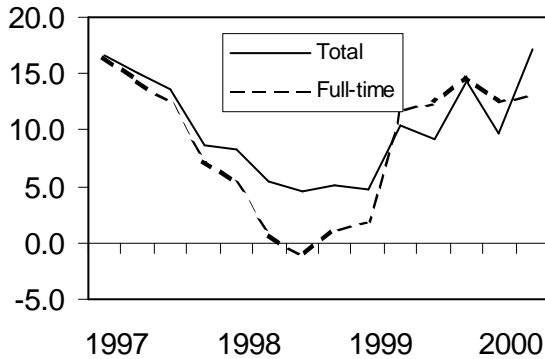
The figures shown for this sector include all the Trading Committees of the States: Harbours and Airport, Jersey Post and Jersey Telecoms. The strong seasonal pattern (Figure 16) reflects the importance of tourism to road, sea and air transport. The underlying upward trend apparent until late 1999 has since turned into a decline for every quarter up to September 2000 (Figure 17).

## Computer and related activities

**Figure 18 - Employment in Computer and related activities**



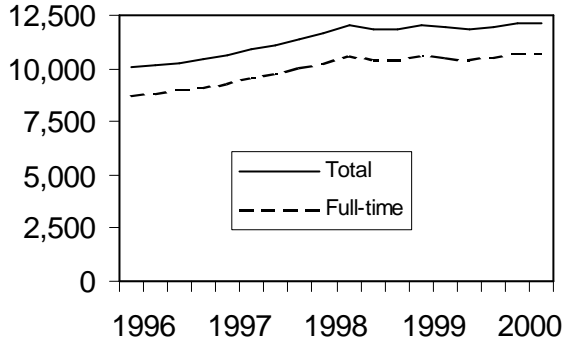
**Figure 19 - Twelve-month percentage changes  
Computer and related activities**



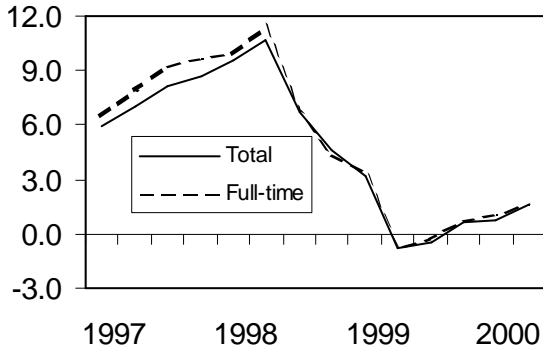
Computing is a sector that has shown an annual increase, averaging ten per cent every quarter since 1996. In this time, employment has grown from 310 to 510 (Figure 18).

## Financial and legal activities

**Figure 20 - Employment in Financial and legal activities**



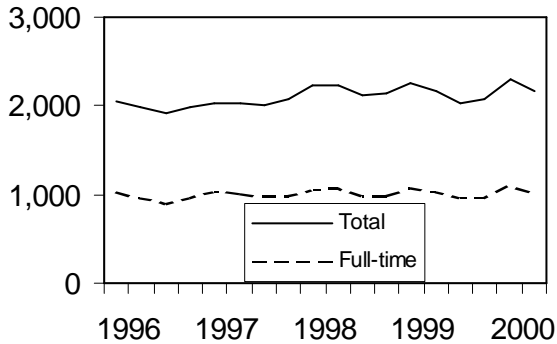
**Figure 21 - Twelve-month percentage changes Financial and legal activities**



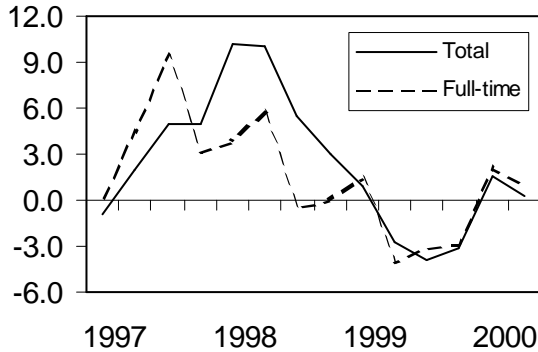
“Financial Activities” include banking, investment, insurance and accounting. With legal activities also included, employment in the sector passed 10,000 in 1996, there was then rapid growth until 1998 (Figure 20). Since that time, employment in the sector has only shown very slight growth

## Miscellaneous business activities

**Figure 22 - Employment in Miscellaneous business activities**



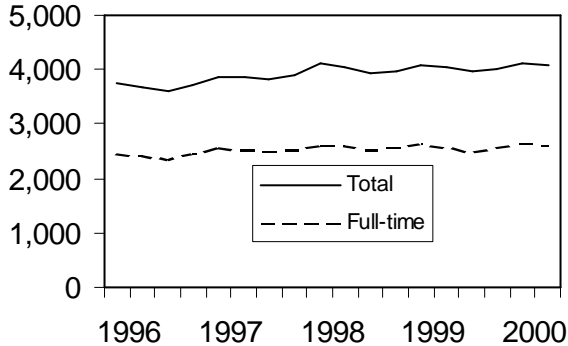
**Figure 23 - Twelve-month percentage changes Miscellaneous business activities**



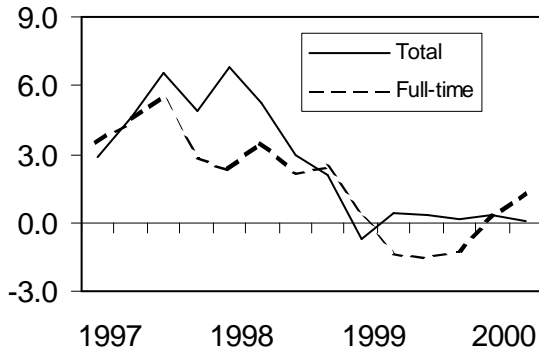
This sector includes estate agency, architecture, car hire, security services and a wide range of other activities, and has a very high proportion of part-time staff. The car hire element accounts for most of the seasonal pattern apparent in Figure 22. The 12-month changes (Figure 23) show increasing growth until mid-1998 and then a decline during 1999, whilst, allowing for seasonal variations, the last two quarters for 2000 remain reasonably stable.

## 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. As in most sectors, the trend in employment has been upward from 1996 to early 1999 (Figure 24). Since that time, the total employment has grown very slowly to 4,100 (Figure 24).

**Notes:**

1. The manpower survey is carried out quarterly and covers over 4,400 undertakings in Jersey employing a total of nearly 47,000 staff at September 2000, including nearly 8,500 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 about the survey is available from the Statistics Unit, telephone 603401. 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 2001



**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>	<i>Jun-00</i>	<i>Sep-00</i>
<b>Full-time staff</b>																		
Agriculture and fishing	2,200	1,880	1,440	1,960	2,200	1,900	1,490	2,000	2,240	1,920	1,470	2,080	2,230	1,870	1,500	1,910	2,030	1,740
Manufacturing	2,090	2,040	2,010	2,030	2,030	1,990	1,970	1,950	1,940	1,910	1,900	1,940	1,930	1,920	1,860	1,880	1,930	1,880
Construction and quarrying	3,920	3,880	3,790	3,990	4,070	4,150	4,340	4,520	4,600	4,490	4,220	4,220	4,230	4,200	4,030	4,130	4,020	4,020
Electricity, gas and water	590	590	600	590	580	600	620	630	600	610	620	620	600	590	580	600	610	610
Wholesale and retail trades	6,570	6,430	6,240	6,210	6,610	6,550	6,460	6,450	6,700	6,590	6,430	6,480	6,490	6,340	6,250	6,430	6,310	6,320
Hotels, restaurants and bars	6,730	6,080	3,870	4,630	6,780	6,160	4,100	4,800	6,780	6,170	4,120	4,820	6,490	5,770	3,800	4,480	6,100	5,490
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	2,580	2,530	2,370	2,300	2,490	2,450
Computer and related activities	290	300	300	320	330	340	340	340	350	340	340	350	360	380	380	400	400	430
Financial and legal activities	8,750	8,870	8,990	9,150	9,320	9,570	9,820	10,040	10,230	10,660	10,480	10,480	10,580	10,570	10,450	10,560	10,690	10,750
Miscellaneous business activities	1,030	970	910	970	1,030	1,010	1,000	1,000	1,070	1,070	990	1,000	1,090	1,030	960	970	1,110	1,040
Education, health and other services	2,480	2,420	2,360	2,460	2,560	2,520	2,480	2,530	2,620	2,610	2,540	2,590	2,630	2,580	2,500	2,560	2,640	2,610
<b>Total full-time staff</b>	<b>36,970</b>	<b>35,700</b>	<b>32,690</b>	<b>34,430</b>	<b>37,890</b>	<b>37,150</b>	<b>34,960</b>	<b>36,530</b>	<b>39,630</b>	<b>38,790</b>	<b>35,480</b>	<b>36,940</b>	<b>39,190</b>	<b>37,790</b>	<b>34,680</b>	<b>36,210</b>	<b>38,330</b>	<b>37,340</b>
<b>Part-time staff</b>																		
Agriculture and fishing	230	200	190	180	220	210	210	200	230	210	200	200	230	220	160	180	220	230
Manufacturing	460	420	400	400	410	390	380	420	440	410	400	430	440	440	430	430	450	460
Construction and quarrying	230	220	220	230	250	250	250	260	270	270	280	260	260	250	240	230	240	260
Electricity, gas and water	30	30	30	30	20	30	30	20	20	20	20	20	20	20	20	20	10	20
Wholesale and retail trades	1,910	1,880	1,860	1,860	1,920	1,920	1,920	1,920	2,010	1,910	1,800	1,710	1,750	1,750	1,720	1,660	1,720	1,690
Hotels, restaurants and bars	1,040	930	820	890	1,130	1,040	960	1,020	1,230	1,120	1,020	1,090	1,270	1,210	1,020	1,010	1,140	1,080
Transport, storage and communication	290	280	170	220	330	320	200	250	370	360	260	260	350	310	230	250	360	360
Computer and related activities	30	30	30	30	30	30	40	40	40	50	60	50	50	50	50	60	50	80
Financial and legal activities	1,270	1,290	1,300	1,300	1,300	1,300	1,310	1,330	1,390	1,380	1,390	1,410	1,420	1,360	1,360	1,400	1,390	1,390
Miscellaneous business activities	1,030	1,020	1,010	1,010	1,010	1,010	1,020	1,080	1,170	1,160	1,130	1,140	1,180	1,140	1,080	1,100	1,190	1,130
Education, health and other services	1,270	1,260	1,240	1,270	1,290	1,320	1,350	1,380	1,490	1,430	1,410	1,400	1,460	1,490	1,460	1,430	1,460	1,460
<b>Total part-time staff</b>	<b>7,780</b>	<b>7,560</b>	<b>7,260</b>	<b>7,400</b>	<b>7,900</b>	<b>7,830</b>	<b>7,660</b>	<b>7,890</b>	<b>8,670</b>	<b>8,330</b>	<b>7,960</b>	<b>7,950</b>	<b>8,420</b>	<b>8,230</b>	<b>7,750</b>	<b>7,770</b>	<b>8,230</b>	<b>8,140</b>
<b>All staff</b>																		
Agriculture and fishing	2,420	2,080	1,630	2,140	2,410	2,120	1,700	2,200	2,470	2,130	1,670	2,280	2,460	2,090	1,660	2,090	2,250	1,980
Manufacturing	2,550	2,460	2,410	2,430	2,440	2,380	2,360	2,370	2,380	2,330	2,300	2,370	2,370	2,360	2,280	2,300	2,380	2,340
Construction and quarrying	4,140	4,110	4,010	4,220	4,320	4,400	4,580	4,780	4,870	4,760	4,500	4,470	4,480	4,460	4,270	4,360	4,270	4,270
Electricity, gas and water	620	620	630	620	610	630	650	650	620	630	640	640	610	610	600	620	620	620
Wholesale and retail trades	8,480	8,310	8,090	8,070	8,530	8,470	8,380	8,360	8,710	8,500	8,240	8,190	8,230	8,090	7,970	8,090	8,040	8,010
Hotels, restaurants and bars	7,780	7,010	4,700	5,520	7,900	7,200	5,060	5,810	8,000	7,290	5,130	5,910	7,770	6,990	4,820	5,490	7,230	6,570
Transport, storage and communication	2,620	2,530	2,350	2,340	2,710	2,680	2,540	2,530	2,870	2,790	2,630	2,630	2,920	2,840	2,600	2,550	2,850	2,810
Computer and related activities	310	320	330	350	360	370	380	380	390	390	390	400	410	430	430	450	450	510
Financial and legal activities	10,020	10,160	10,290	10,450	10,610	10,870	11,120	11,360	11,630	12,030	11,870	11,890	11,990	11,940	11,810	11,960	12,080	12,130
Miscellaneous business activities	2,060	1,990	1,920	1,980	2,040	2,030	2,010	2,080	2,240	2,230	2,120	2,140	2,270	2,170	2,040	2,070	2,300	2,170
Education, health and other services	3,750	3,670	3,600	3,730	3,850	3,840	3,830	3,910	4,120	4,050	3,950	3,990	4,090	4,060	3,960	3,990	4,100	4,070
<b>Total staff</b>	<b>44,750</b>	<b>43,260</b>	<b>39,950</b>	<b>41,830</b>	<b>45,790</b>	<b>44,980</b>	<b>42,610</b>	<b>44,420</b>	<b>48,290</b>	<b>47,120</b>	<b>43,440</b>	<b>44,890</b>	<b>47,610</b>	<b>46,020</b>	<b>42,430</b>	<b>43,980</b>	<b>46,560</b>	<b>45,470</b>

## APPENDIX 2

## Staff numbers and vacancies, including one-person businesses

	<i>Staff numbers</i>					<i>Vacancies</i>					<i>Vacancies as percent of staff employed</i>				
	<i>Sep-99</i>	<i>Dec-99</i>	<i>Mar-00</i>	<i>Jun-00</i>	<i>Sep-00</i>	<i>Sep-99</i>	<i>Dec-99</i>	<i>Mar-00</i>	<i>Jun-00</i>	<i>Sep-00</i>	<i>Sep-99</i>	<i>Dec-99</i>	<i>Mar-00</i>	<i>Jun-00</i>	<i>Sep-00</i>
<b>Full-time staff</b>															
Agriculture and fishing	1,920	1,550	1,960	2,080	1,790	160	200	150	80	90	8.5	12.8	7.6	3.9	4.7
Manufacturing	1,950	1,890	1,910	1,960	1,920	140	200	140	160	90	7.0	10.5	7.1	7.9	4.9
Construction and quarrying	4,410	4,230	4,340	4,230	4,240	320	410	470	410	320	7.2	9.6	10.8	9.6	7.5
Electricity, gas and water	590	580	600	610	610	30	20	30	50	50	4.6	3.8	4.3	8.2	8.3
Wholesale and retail trades	6,460	6,380	6,550	6,420	6,440	450	500	520	510	530	6.9	7.8	8.0	7.9	8.2
Hotels, restaurants and bars	5,790	3,840	4,500	6,120	5,510	500	470	510	430	360	8.7	12.1	11.3	6.9	6.5
Transport, storage and communication	2,560	2,400	2,340	2,520	2,500	130	140	170	180	150	5.2	5.7	7.2	7.2	5.8
Computer and related activities	400	410	430	440	470	20	50	60	70	60	5.7	11.2	13.4	15.6	13.0
Financial and legal activities	10,640	10,520	10,630	10,760	10,830	900	910	1,040	1,070	940	8.4	8.6	9.8	10.0	8.6
Miscellaneous business activities	1,100	1,050	1,070	1,240	1,130	80	90	100	150	90	7.5	8.7	9.1	12.3	7.6
Education, health and other services	2,660	2,580	2,650	2,720	2,710	210	230	260	210	180	7.7	8.8	9.6	7.9	6.7
<b>Total full-time staff</b>	<b>38,480</b>	<b>35,420</b>	<b>36,980</b>	<b>39,100</b>	<b>38,140</b>	<b>2,940</b>	<b>3,190</b>	<b>3,430</b>	<b>3,320</b>	<b>2,840</b>	<b>7.6</b>	<b>9.0</b>	<b>9.3</b>	<b>8.5</b>	<b>7.4</b>
<b>Part-time staff</b>															
Agriculture and fishing	230	170	190	230	240	0	0	10	10	10	1.3	1.7	5.3	2.7	2.1
Manufacturing	450	440	440	460	470	10	10	10	0	0	3.1	1.8	1.4	0.9	0.9
Construction and quarrying	270	260	260	260	270	10	10	20	10	10	2.2	2.3	8.6	3.4	3.0
Electricity, gas and water	20	20	20	10	20	0	0	0	10	0	0.0	0.0	22.2	42.9	17.6
Wholesale and retail trades	1,800	1,770	1,710	1,780	1,750	160	130	150	150	150	9.0	7.1	9.0	8.5	8.3
Hotels, restaurants and bars	1,220	1,020	1,010	1,140	1,090	30	30	50	40	30	2.0	2.9	4.6	3.7	2.3
Transport, storage and communication	320	240	260	370	370	40	30	40	30	30	11.1	12.1	15.6	8.4	8.9
Computer and related activities	70	70	80	70	100	20	20	20	10	10	23.1	27.9	21.3	13.7	8.7
Financial and legal activities	1,400	1,390	1,440	1,420	1,430	70	50	60	50	70	5.3	3.4	4.4	3.8	4.6
Miscellaneous business activities	1,180	1,130	1,160	1,270	1,190	40	190	150	100	90	3.0	16.6	13.2	7.9	7.9
Education, health and other services	1,560	1,530	1,500	1,530	1,540	80	70	90	70	50	5.4	4.2	5.9	4.6	3.4
<b>Total part-time staff</b>	<b>8,510</b>	<b>8,040</b>	<b>8,060</b>	<b>8,540</b>	<b>8,470</b>	<b>450</b>	<b>520</b>	<b>610</b>	<b>480</b>	<b>440</b>	<b>5.3</b>	<b>6.5</b>	<b>7.5</b>	<b>5.7</b>	<b>5.2</b>
<b>All staff</b>															
Agriculture and fishing	2,140	1,720	2,150	2,300	2,040	170	200	160	90	90	7.7	11.7	7.4	3.8	4.4
Manufacturing	2,400	2,330	2,340	2,420	2,380	150	210	140	160	100	6.3	8.8	6.1	6.6	4.1
Construction and quarrying	4,680	4,490	4,600	4,500	4,510	330	410	490	420	330	6.9	9.2	10.7	9.3	7.2
Electricity, gas and water	610	600	620	620	620	30	20	30	60	50	4.5	3.7	4.8	9.0	8.5
Wholesale and retail trades	8,260	8,140	8,260	8,200	8,190	610	620	680	660	670	7.4	7.6	8.2	8.0	8.2
Hotels, restaurants and bars	7,010	4,860	5,520	7,260	6,600	530	500	560	470	380	7.5	10.2	10.1	6.4	5.8
Transport, storage and communication	2,880	2,640	2,600	2,890	2,870	170	170	210	210	180	5.9	6.3	8.0	7.4	6.2
Computer and related activities	470	480	510	510	570	40	70	80	80	70	8.1	13.6	14.6	15.4	12.2
Financial and legal activities	12,040	11,910	12,060	12,180	12,250	970	950	1,100	1,130	1,000	8.1	8.0	9.1	9.2	8.2
Miscellaneous business activities	2,290	2,180	2,230	2,510	2,330	120	280	250	250	180	5.2	12.8	11.2	10.1	7.7
Education, health and other services	4,220	4,120	4,150	4,250	4,250	290	290	340	280	230	6.8	7.1	8.3	6.7	5.5
<b>Total staff</b>	<b>46,980</b>	<b>43,460</b>	<b>45,040</b>	<b>47,640</b>	<b>46,600</b>	<b>3,390</b>	<b>3,710</b>	<b>4,030</b>	<b>3,800</b>	<b>3,280</b>	<b>7.2</b>	<b>8.5</b>	<b>8.9</b>	<b>8.0</b>	<b>7.0</b>