

Jersey in Figures, 2005

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Foreword

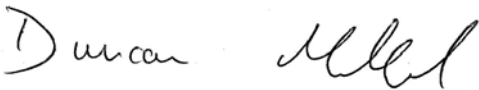
'Jersey in Figures 2005' presents key economic, social and environmental information on Jersey and aims to be a convenient reference book for government members, public and private institutions, the general public and visitors to the Island.

In aiming to keep Jersey in Figures as a pocket sized publication, we can only publish a summary of the information that is produced about Jersey, but further information can be obtained for the various references that are given. In addition most referenced material that is published by the States of Jersey can be viewed or downloaded from the website www.gov.je. All information published by the Statistics Unit can be accessed at www.gov.je/statistics.

'Jersey in Figures 2005' is published by the States of Jersey Statistics Unit. We are grateful to all States departments and private organisations for providing the information contained in this edition.

The next edition of Jersey in Figures will be published in March 2007.

I trust readers will continue to find Jersey in Figures a useful reference and comments relating to the content are welcome.

The image shows two handwritten signatures in black ink. The first signature on the left is 'Duncan' and the second signature on the right is 'Millard'.

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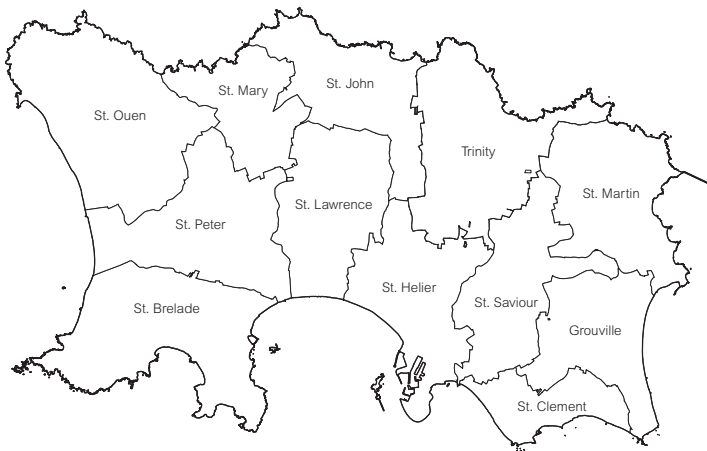
An Introduction to Jersey

Jersey is the largest of the Channel Islands with an area of 118.2 sq. km., situated 14 miles off the north-west coast of France and 85 miles from the English coast.

Jersey is a Crown Dependency and is not part of the UK, nor is it a colony, but it owes allegiance to the British Crown and the UK is responsible for Jersey's defence and international representation. It is not represented in the UK parliament, whose Acts only extend to Jersey if expressly agreed by the Island that they should do so.

Jersey is not a member of the European Union, although it has a special relationship with the EU which is defined in Protocol 3 to the UK Treaty of Accession.

The Island of Jersey is divided into 12 parishes: Grouville, St. Brelade, St. Clement, St. Helier, St. John, St. Lawrence, St. Martin, St. Mary, St. Ouen, St. Peter, St. Saviour and Trinity, each of which is presided over by an elected Connétable, who deals with issues relating to civil matters, and by a Rector who oversees issues relating to ecclesiastical affairs.



The legislature of the Island is called 'The States of Jersey', members of which are elected by the population, male and female. The States comprises the Bailiff who is President of the Assembly, the Lieutenant-Governor, 12 Senators, the Constables (Connétables) of the 12 parishes of the Island, 29 Deputies, the Dean of Jersey, the Attorney-General and the Solicitor-General. They all have the right to speak in the Assembly, but only the 53 elected

members (the Senators, Connétables and Deputies) have the right to vote; the Bailiff who is appointed by the Crown acts as Speaker and the Deputy Bailiff presides in his absence.

In December 2005 a new system of government was established in Jersey. The old Committee system was abolished and replaced by a new Council of Ministers working alongside Scrutiny Panels. There are still 53 States members. A maximum of 23 members can be in ministerial positions either as Ministers (ten members) or Assistant Members (up to 13 members). Up to 20 other States members can sit on the Scrutiny Panels.

The economy of Jersey has seen a great deal of change during the past 30 to 40 years as markets have become more international and global travel has increased. This has meant that traditional Jersey industries such as agriculture and tourism are having to operate in fiercely competitive markets and are no longer the dominant industries in Jersey.

However, the international nature of business has allowed the single-most dramatic change to the Jersey economy to take place. Over the past 20 to 30 years the Financial services sector (banking, trust and fund administration and management, accountancy and legal activities) has grown such that it now accounts for just over half of all the economic activity in Jersey and employs almost a quarter of the workforce.

Reliable and timely statistics continue to form the basis of effective policy making. It is hoped that 'Jersey in Figures' can continue to contribute towards this goal.

Further Reading: www.gov.je/ChiefMinister/International+Relations/Profile+of+Jersey.htm

Key Indicators

Economic Data (2004 figures)

Gross Value Added (GVA)	£3.22 billion
Gross National Income (GNI)	£3.04 billion
GNI per head of population	£35,000
States General Funds income	£441 million
States Net Revenue expenditure	£412 million
States Income Tax returns	£363 million

Prices and Earnings

All-Items Retail Prices Index (12 months to December 2005)	2.2%
RPI (X) – the RPI excluding house purchase costs	2.2%
Annual increase in the rate of average earnings (12 months to June 2005)	5.3%

Population

Resident population (11 March 2001, Census Day)	87,186
Estimated population (December 2004)	87,700
Population per square kilometre (December 2004)	760
Average annual percentage growth in population (1991-2004)	0.3%
Proportion of population (2001 Census)	
working age (women/men 16-59/64 years)	65%
below working age	18%
above working age	17%
Annual crude birth rate per 1,000 population (2004)	11.1
Annual crude death rate per 1,000 population (2004)	8.5
Average age at death (2000-2004)	men 72, women 79

Housing

Number of private households (2001 Census)	35,562
Average number of persons per private household (2001 Census)	2.38

1. States of Jersey Income and Expenditure

1. States of Jersey Income and Expenditure

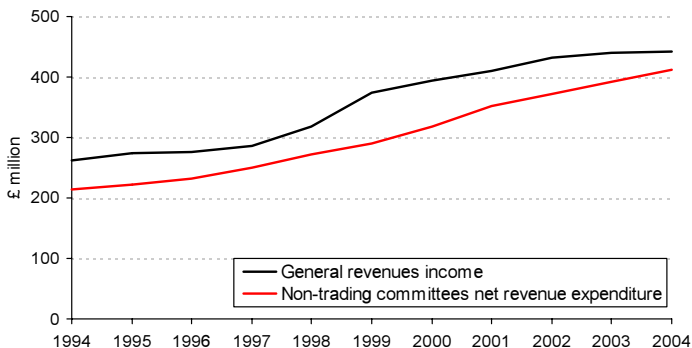
In 2004, the States of Jersey incurred a deficit of £19 million, as opposed to the £7 million deficit originally forecast. This increased deficit was due to lower than expected tax and duty revenues, income tax revenues falling for the first time in 50 years, and revenue expenditure being slightly above the budgeted level.

The Total Income for 2004 amounted to £441 million, £1 million less than in 2003. Total States net expenditure was £460 million, comprising net revenue expenditure of £412 million and capital expenditure of £48 million. The increase in total States expenditure of 3.8% is the lowest for ten years.

Table 1.1 States of Jersey Income and Expenditure, 2004

Budget 2004		Actual 2004	Actual 2003
£ million	Income	£ million	£ million
367	Income tax	363	367
54	Impôts	50	48
14	Stamp duty	15	13
14	Other income	13	14
449	Total income	441	442
(408)	Revenue expenditure	(412)	(393)
41	Surplus before Capital Expenditure Voted	29	49
(48)	Capital Expenditure Voted	(48)	(50)
(7)	Balance after Capital Expenditure Voted	(19)	(1)

Figure 1.1 General Funds Income and Expenditure, 1994-2004



1. States of Jersey Income and Expenditure

In 2004, 70% of the net revenue expenditure by non-trading Committees was incurred by the three Committees of Health and Social Services, Education, Sport and Culture and Employment and Social Security.

Table 1.2 Net Revenue Expenditure of Non-Trading Committees, 2003 and 2004

Committee	Actual 2003	Budgeted 2004	Actual 2004
Health and Social Services	116,661	121,599	120,691
Education, Sport and Culture	79,714	87,903	89,635
Employment and Social Security	78,240	80,401	80,216
Home Affairs	37,859	37,582	40,252
Environment and Public Services	23,548	21,966	29,088
Finance and Economics	22,971	19,446	16,613
Economic Development	18,662	18,538	17,236
Policy and Resources	6,267	6,493	6,918
Overseas Aid	4,596	5,306	5,261
Privileges and Procedures	2,474	3,967	4,859
Housing	1,980	(239)	1,563
Other	(187)	(78)	(341)
General Reserve		5,016*	
Total Net Revenue Expenditure	392,785	407,900	411,991

Figures are in £ thousands.

* the budgeted General Reserve provides for pay and pension increases yet to be agreed at the time of the Budget. As these are agreed they are allocated to the respective Committee.

Table 1.3 Jersey Currency in Circulation (£ Million), 1994-2005

	Notes	Coins	Total
1994	32.3	3.03	5.3
1996	38.4	3.4	41.8
1998	40.7	3.94	4.6
2000	48.4	4.5	52.9
2002	55.2	5.1	60.3
2003	61.0	5.46	6.5
2004	62.8	5.8	68.6
2005	64.5	6.2	70.7

Figures as at December of each year.

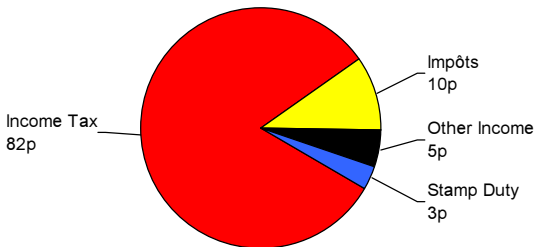
Further reading: *The Treasurer of the States Financial Report and Accounts*.

1. States of Jersey Income and Expenditure

Income and Expenditure for 2006

Income tax, paid by individuals and businesses is expected to raise 82% (or 82p out of each £1) of states income in 2006.

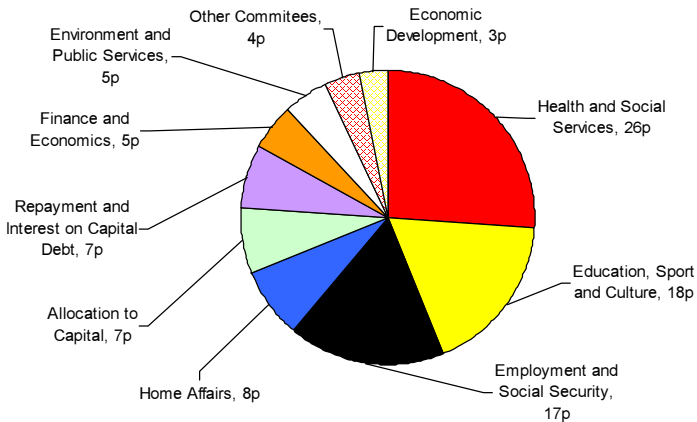
Figure 1.2 Where each pound of States of Jersey money will come from in 2006



Source: States of Jersey Budget Report 2006

In 2006, for every £1 the States will spend about 26p will go on health, 18p on education and 17p on employment and social security.

Figure 1.3 Where each pound of States of Jersey money will be spent in 2006



Source: States of Jersey Budget Report 2006

2. Tax Receipts

Total income tax revenue in 2004 was £363 million, which was £4 million less than in 2003. Despite this recent fall, tax receipts have increased by 12% since 1999 (a fall of 11% in real terms) and are projected to increase each year until 2009 before falling in 2010 as a result of the introduction of "0/10" (the new corporate tax regime).

For the first time in 50 years the income tax revenue in 2004 was less than that collected in the previous year (by £4 million). Forecasts suggest there will be small increases in the next few years before the introduction of a new corporate tax structure in 2009, leading to a reduction of £80 to £100 million per annum over the period of 2010-2013.

Figure 2.1 Income Tax Receivable, Actual and Estimated, 1999-2015

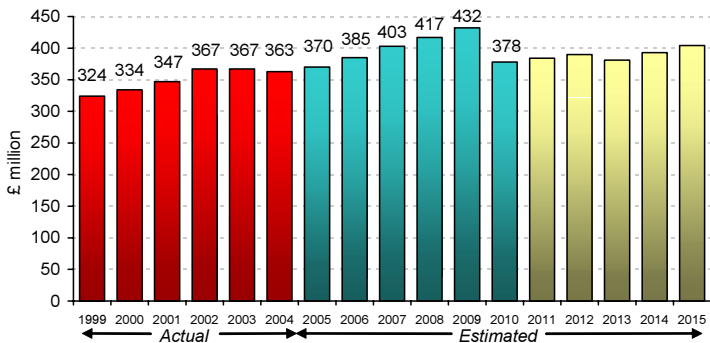
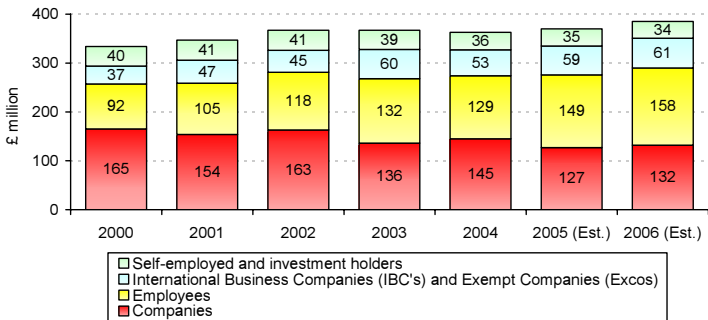


Figure 2.2 Sources of Income Tax Receipts, 2000-2006



2. Tax Receipts

Between 2000 and 2004, tax receipts from employees increased by two-fifths (40%), whilst that derived from companies (excluding International Business Companies, IBCs, and Exempt Companies, EXCOS) decreased by an eighth (12%). Employees paid 36% of total income tax in 2004 compared to 28% in 2000.

In recent years the proportion of tax revenue from companies, IBC's and EXCOS has reduced slightly from 58% in 2001 to 55% in 2004. The decline in tax from corporations has been partially offset by continued growth in revenue from personal tax.

The growth in personal tax revenue is partly due to the policy of freezing personal exemptions and allowances, causing a slightly higher proportion of people becoming liable to pay tax each year. The effect of this policy has been that the proportion of people eligible for tax assessment and thus liable to pay tax has increased from 57% in 1993 to 73% in 2005.

Table 2.1 Levels of Tax Exemption and Allowance, 2005

Exemptions

Single person	£11,020
Single person (aged 63+ years)	£12,300
Married couple	£17,680
Married couple (aged 63+ years)	£20,250

Allowances

Single person	£2,600
Married couple	£5,200
Earned income (max)	£3,400
Wife's earned income (max)	£4,500
Child allowance	£2,500
Child allowance (higher education)	£5,000

Additional allowance*

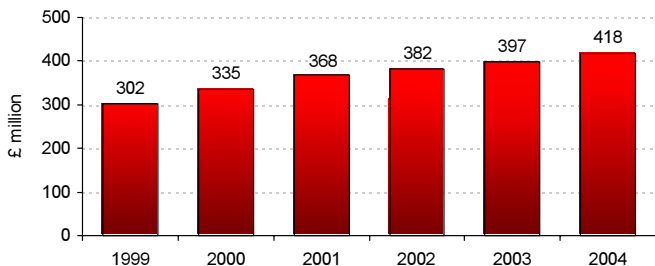
£4,500

* For people with single-handed responsibility for children

The Strategic Reserve

The Strategic Reserve is a capital safeguard against unforeseen events and economic downturn. The Strategic Reserve increases each year as the return on its investments are reinvested. During 2004, the growth from net realised income was £9.6 million and the unrealised profit on investment was £11.6 million. At December 2004 the market value of the fund's assets was £418 million.

Figure 2.3 Market Value of Strategic Reserve, 1999-2004



Figures are £ millions and stated at market value at 31 December each year.

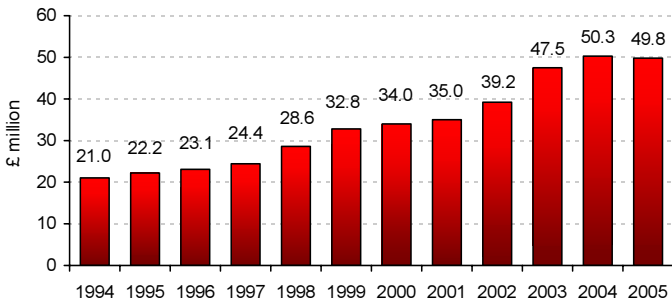
Further reading: Income Tax Office Annual Reports

3. Impôts

3. Impôts

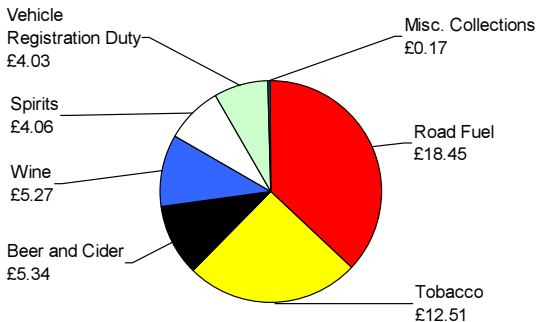
Impôt duty receipts in 2005 were £49.8 million, £0.5 million less than in 2004, and £3.4 million less than budgeted. The revenue raised from impôt duties has increased by more than 50% since 1999.

Figure 3.1 Customs and Excise Duty Collected, 1994-2005



In 2005, impôt duties on road fuel generated the most revenue, £18.5 million (37% of the total) with tobacco duty raising £12.5 million, 25% of the total impôt receipts. Vehicle registration duty and the individual alcohol categories each contributed between 8% and 11% of total duty collected.

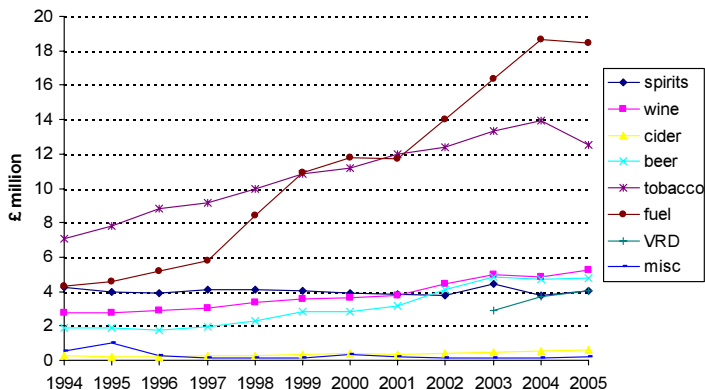
Figure 3.2 Customs and Excise, Sources of Revenue, 2005



Revenue in £ million.

The revenue raised from motor fuel and tobacco duties has increased markedly over the past 10 years. However, whilst duty from tobacco has almost doubled and motor fuels has increased three fold over this period, both are now showing a slowdown. Duty raised from spirits has seen little change whilst that raised from beer and wine has more than doubled.

Figure 3.3 Impôts Duty Receipts, 1994-2005



Note: VRD = Vehicle Registration Duty, this was first introduced in 2003.

Whilst the rate of duty has increased in most years, the amount of duty liable products imported has generally fallen. In 2005 beer imports were down by 24% on 1994 levels, road fuel down 10%, spirits down 45% and tobacco more than halved. However, wine and cider imports have stayed predominantly flat over the period.

Table 3.1 Annual Quantity of Dutiable Goods, 1994-2005

Quantity (thousands of litres)	1994	1996	1998	2000	2001	2002	2003	2004	2005
Wine	3,657	4,005	4,011	3,882	3,775	3,753	4,066	3,832	4,153
Cider	1,077	1,011	1,056	1,088	1,085	983	1,050	1,133	1,223
Beer	14,170	13,244	13,589	11,884	11,626	11,103	11,303	10,664	10,837
Road fuel	55,500	54,301	54,376	53,160	53,150	53,100	51,878	49,604	50,032
Spirits (thou of ltrs/alc)	372.0	344.1	295.2	254.2	222.0	196.8	224.3	189.9	203.9
Tobacco (thou of kilos)	184.7	197.9	152.5	122.5	107.2	102.5	97.3	83.8	68.6

Further reading: Customs and Excise Department, Annual Reports.

4. Prices and Earnings

Jersey (All-Items) Retail Prices Index, RPI

The RPI measures changes in the cost of a representative selection of goods and services bought by Jersey households. Over 500 items are included in the Index.

The RPI is an index number based on a point in time (currently June 2000 being set equal to 100). The rate of change of the RPI, quoted as a percentage, normally compares the current index to the same quarter a year previously and hence measures the rate at which prices are changing overall. This annual percentage change is also known as the 'rate of inflation'.

During the twelve months to December 2005, the All-Items Retail Prices Index for Jersey increased by 2.2% to stand at 123.0 (June 2000 = 100). This compares to 2.0% in the twelve months to September 2005 and 5.3% in the twelve months to December 2004.

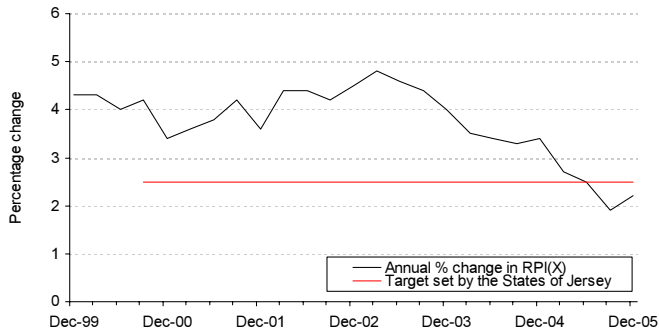
The large reduction in the rate of increase between 2004 and 2005 is mainly due to the period of increases in mortgage interest rates feeding into house purchases costs coming to an end. Lower increases in food prices in Jersey have also contributed to the smaller rate of increase. However, external factors remain a key feature of current increases, notably with higher oil prices driving the index up.

Table 4.1 Jersey All-Items Retail Prices Index (RPI) in Jersey, UK and Guernsey and the RPI (X) for Jersey, 2000-2005

		RPI Index	Annual Movements (%)			RPI (X)
		June		UK	Guernsey	Jersey
		2000=100	Jersey			
2000	Dec	101.6	4.0	2.9	3.9	3.4
2001	Dec	104.7	3.1	0.7	1.9	3.6
2002	Dec	109.8	4.9	2.9	4.4	4.5
2003	Mar	112.4	4.9	3.1	4.7	4.8
	Jun	112.9	4.2	2.9	4.3	4.6
	Sep	113.9	3.8	2.8	3.3	4.4
	Dec	114.2	4.0	2.8	3.9	4.0
2004	Mar	116.6	3.7	2.6	4.2	3.5
	Jun	118.3	4.8	3.0	4.5	3.4
	Sep	120.3	5.6	3.1	5.2	3.3
	Dec	120.3	5.3	3.5	4.9	3.4
2005	Mar	121.9	4.5	3.2	4.6	2.7
	Jun	122.6	3.6	2.9	4.6	2.5
	Sep	122.7	2.0	2.7	3.8	1.9
	Dec	123.0	2.2	2.2	3.3	2.2

The annual change in the RPI excluding house purchase costs, RPI (X) – the ‘underlying rate of inflation’ – is the measure used by the States of Jersey for its target inflation level. In 2000 the States agreed to work towards a target rate for underlying inflation of 2.5%. This target was achieved for the first time in June 2005. Underlying inflation has remained at or below target for the last 3 quarters of 2005.

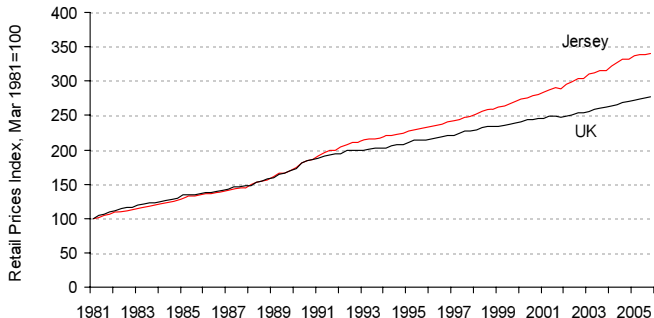
Figure 4.1 Annual Change in RPI (X) compared with the Target Rate of Inflation



Further reading: Jersey Retail Prices Index, published quarterly by the Statistics Unit.

Since 1990, the rate of inflation as measured by the RPI has increased at a faster rate in Jersey (average of 4.2% per annum) than in the UK (2.8% per annum). However, over the 12 months to December 2005 the increases were the same (2.2%).

Figure 4.2 Jersey and UK Retail Prices Indices, 1981-2005 (March 1981=100)



4. Prices and Earnings

Comparison of Consumer Prices in Jersey and the UK

The comparison of consumer prices between Jersey and UK undertaken at June 2005 showed that:

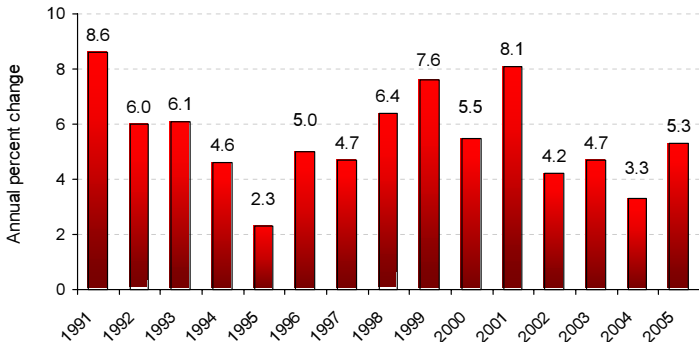
- Since 200 prices averaged across all goods and services in Jersey have risen nearly twice as fast as in the UK, but the 12-months to June 2005 saw fairly similar increases.
- In the 12 months to June 2005 Jersey saw a much lower overall increase in food prices compared to both 2004 and the UK, 4% in 2004 and just 0.4% in 2005 compared to 2% in the UK. However, over the past five years, food prices have risen by twice as much in Jersey than in the UK.
- Direct price comparisons show that in June 2005 average meat, fish and vegetable prices were a fifth higher in Jersey than in the UK, with a pint of milk still costing on average 60% more in Jersey.

Further reading: Annual UK/Jersey Price Comparison, - the Statistics Unit.

Earnings

The Index of Average Earnings measures changes in gross wages and salaries paid to employees. It includes overtime payments, but excludes bonuses, employers' insurance contributions, holiday pay and benefits in kind.

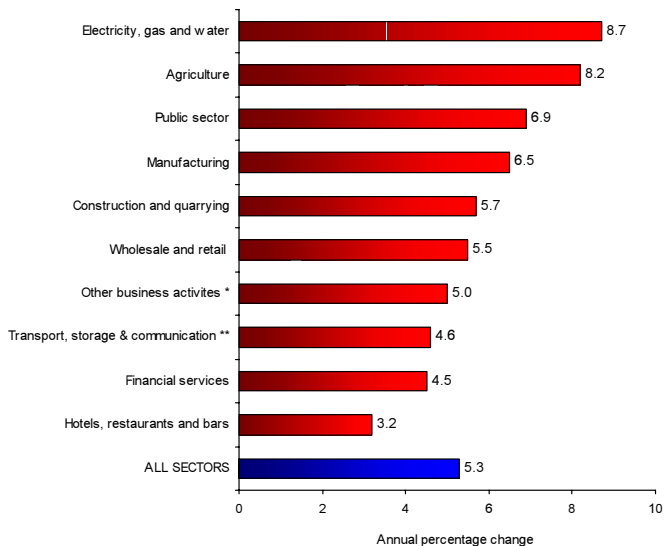
Figure 4.3 Annual Change (%) in Average Earnings, 1991-2005



Earnings rose by 5.3% in the year to June 2005 compared to 3.3% in the previous year.

The rate of increase in 2005 was similar to the average annual increase recorded during the preceding 15-year period (5.5% per annum).

Figure 4.4 Annual Percentage Change in Average Earnings by Sector, 2004-2005



* The 'Other business activities' sector includes 'Miscellaneous business activities' and private sector 'Education, health and other services'.

** 'Transport, storage and communication' includes the States Trading Committees (Jersey Airport, Harbours, Postal Administration and Jersey Telecom).

The survey from which earnings data in Jersey is derived is designed to measure changes in earnings rather than the actual level at a given point in time. The actual figures for weekly earnings, show in Figure 4.5, should therefore be considered as reasonable approximations.

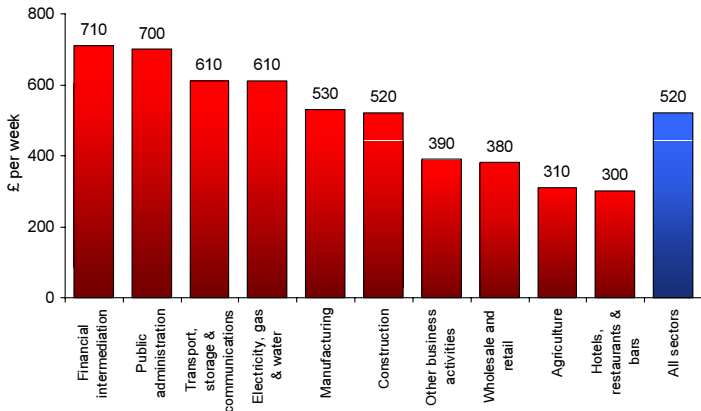
The average weekly earnings of full-time equivalent (FTE) employees in Jersey in June 2005 was £520. The 'Financial services' sector (£710 per week) had the highest average weekly earnings, whilst 'Hotels, restaurants and bars' had the lowest (£300 per week).

The median figure is the best measure of the mid-point for an income distribution, if data on individuals' earnings are available. In 2002 the median equivalised pre-benefit household income (of the economically active population, not just those in employment) was £547 per week. This 2002 figure may be up-rated by the annual rates of change in earnings

4. Prices and Earnings

measured between 2002 and 2005, to produce a figure of £625 per week for 2005. This latter figure is per household; dividing by the average number of FTEs per household (1.24) produces a median earnings of £505 per FTE¹ for June 2005.

Figure 4.5 Average Weekly Earnings by Sector, June 2005



In examining the changes in the RPI and average earnings, it is clear that often in the past, earnings have on average increased at a faster rate than prices. Between 1990 and 2005 the RPI increased by 86% (or an average of 4.2% per year) whilst average earnings increased by 122% (i.e. more than doubled and at an average rate of about 5.5% per year). More recently the increases have been closer; over the past five years the RPI has increased by 22% (4% per annum on average) and average earnings by 28% (5% per annum on average).

Over the last two years the average annual growth in earnings (4.3% per annum) has been similar to the average annual rate of inflation (4.5%). However, in 12 of the past 15 years earnings have increased faster than prices.

¹ Figures taken from the Jersey Income Distribution Survey 2002.

Figure 4.6 Jersey's Index of Average Earnings and Retail Prices Index (June 1990=100)

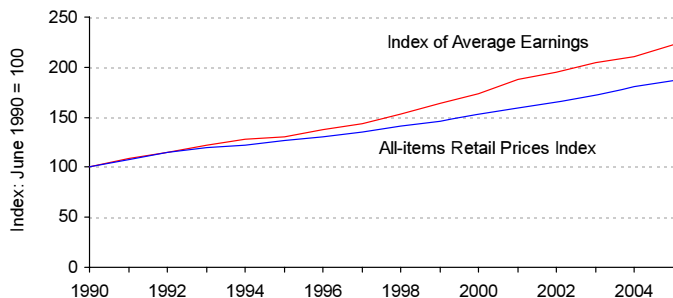
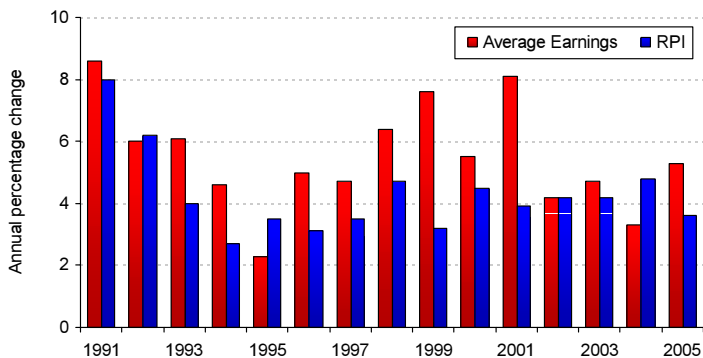


Figure 4.7 Annual percentage changes in the Index of Average Earnings and in the Retail Prices Index at June each year, 1991-2005



Further reading: *Annual Average Earnings Survey and Jersey Economic Digest*, Statistics Unit.

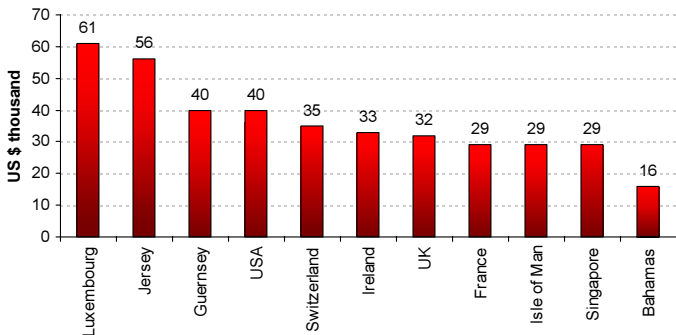
5. GVA, GNI and GDP

In 2004 the value of economic activity in Jersey was £3.22 billion². This measure of the value of activity is the Gross Value Added (GVA) for the Island, and is the sum of wages and salaries and company profits.

The economic activity of Jersey can also be considered in another way, in terms of the wealth of Jersey residents and Jersey-owned businesses; this measure is known as Gross National Income (GNI). GNI is derived from GVA by subtracting money earned in Jersey by businesses owned off-Island but adding back money earned abroad by Jersey residents and businesses. In 2004 GNI for Jersey was approximately £3.04 billion.

Jersey's GNI per capita is amongst the highest in the world; in 2004 only Luxembourg had a higher GNI per capita (\$61,000), whilst the USA and UK stood at \$40,000 and \$32,000 respectively.

Figure 5.1: Jersey GNI per capita in 2004 (PPP \$US)³



Development of the Jersey economy

The economy of Jersey has seen a great deal of change during the past 30 to 40 years as markets have become more international and global travel has increased. This has meant that traditional Jersey industries such as agriculture and tourism are having to operate in fiercely competitive markets and are no longer the dominant industries in Jersey.

However, the international nature of business has allowed the single-most dramatic change to the Jersey economy to take place. Over the past 20 to 30 years the Financial services sector (banking, trust and fund administration and management, accountancy and legal

² Reliable data on the size of the Jersey economy, produced to internationally agreed standards, only exist from 1998, with the latest data being for 2004.

³ Source: World Bank, calculated using OECD purchasing power parity for £ sterling.

activities) has grown such that it now accounts for just over half of all the economic activity in Jersey and employs almost a quarter of the workforce.

Figure 5.2: Gross Value Added by sector⁴, 2004

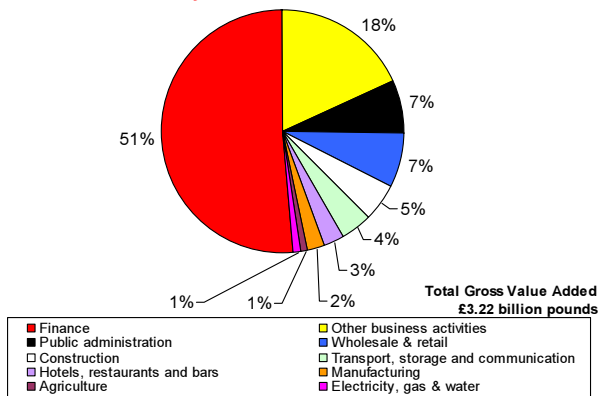
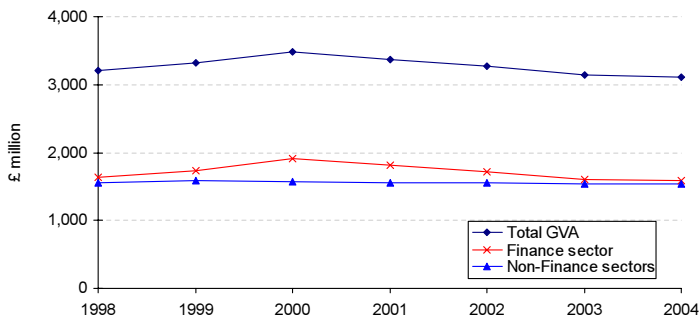


Figure 5.3: Gross Value Added in real terms: constant (2003) prices



⁴ The Other business activities sector is made up of a range of services and activities (e.g. architects, cleaning services, advertising etc.) and includes rental income of private households. However, such rental income is excluded from this sector when comparing performance of individual sectors.

5. GVA, GNI and GDP

The six years to 2004 saw two distinct periods of economic performance: 1998 to 2000 saw strong economic growth whilst 2001 to 2004 saw the economy performing less well. The second feature is the strong relationship between the Finance industry and the Jersey economy overall. So as the GVA of the Finance industry grew by 16% in real terms between 1998 and 2000, total GVA for Jersey correspondingly grew by 9%; but when the value added of the Finance sector declined by 17% total GVA correspondingly fell by 11% in the four years to 2004.

The rate at which this decline is occurring lessened significantly in 2004. The decline in real-term GVA was 1% between 2003 and 2004, compared with larger falls of 4% between 2002 and 2003 and of 3% for the previous two years.

Whilst the performance of the whole Jersey economy has mirrored that of the Finance sector during the past six years, there have been differences in the performance of individual sectors as measured by GVA.

Table 5.1: GVA by sector in real terms [constant (2003) prices - £ million]

Sector	1998	2000	2003	2004	Percentage change		
					1998-2000	2000-2003	2003-2004
Agriculture	60	57	47	44	-5.5	-23.7	-7.5
Manufacturing	73	72	63	60	-1.5	-16.4	-4.7
Electricity, gas and water	41	41	35	34	0.6	-18.4	-2.8
Construction	161	167	164	160	3.5	-3.9	-2.2
Wholesale and retail	221	217	211	209	-1.9	-4.0	-1.2
Hotels, restaurants and bars	132	124	111	109	-6.1	-12.3	-2.5
Transport, storage and communications	134	133	131	132	-1.0	-0.8	0.4
Finance	1,642	1,910	1,609	1,580	16.3	-17.3	-1.8
Other business activities*	192	200	202	208	4.4	3.8	3.1
Public administration	193	211	226	226	9.0	7.1	-0.4
Total GVA	3,203	3,483	3,149	3,114	8.7	-10.6	-1.1

*Excluding rental income of private households, which for 2004 was £353 million. This component is included in the total GVA figure.

Over the entire period of 1998 to 2004, the most notable change in real term GVA occurred in the Agriculture sector, which has seen year on year falls and in 2004 was a quarter smaller than in 1998. The Manufacturing, Electricity, gas and water, and Hotels, restaurants and bars sectors all experienced real term falls of about a sixth over the same period. In contrast, the Other business activities and Public administration sectors saw real-term growth of 8% and 17% respectively over this six year period (3% and -0.4% respectively in the latest year).

Further reading: Jersey Gross Value Added (GVA) and Gross National Income (GNI) 1998-2004: Statistics Unit, September 2005 and Jersey Economic Digest 2005, December 2005.

6. Financial Services

Bank Deposits and fund administration in Jersey

Between 2000 and 2005 total bank deposits held in Jersey have increased by almost £62 billion whilst the number of bank licences has reduced by 24, mainly due to mergers.

Table 6.1 Bank Deposits in Jersey, 2000-2005

	Number of Banks	Deposits (£ billion)		Total
		Sterling	Currency	
2000	73	38.9	77.0	117.9
2001	70	42.1	87.0	129.1
2002	62	43.2	93.3	136.5
2003	55	47.5	108.3	155.8
2004	55	50.7	108.5	159.2
2005	49	55.2	124.5	179.7

Figures as at 30 September each year.

Source: www.jerseyfsc.org

Bank deposits grew by £6.6 billion during the third quarter of 2005. Sterling bank deposits increased by £1.2 billion and currency deposits contributed £5.4 billion to deposit growth. Exchange rate movements accounted for approximately £2.7 billion of the total quarterly income.

The total value of funds administered from Jersey has grown by more than £31 billion over the past five years.

Table 6.2 Total Value and Number of Funds Administered from Jersey, 2000-2005

	Number of Funds	Total No. of Separate Pools	Total Value £ Billion
2000	313	1,410	90.3
2001	296	1,696	94.8
2002	403	1,762	96.9
2003	480	1,921	108.2
2004	769	2,208	96.9
2005	906	2,358	122.0

Figures as at 30 September each year.

Source: www.jerseyfsc.org

The total value of funds administered from within the Island grew by £9.3 billion during the third quarter of 2005. The Net Asset Value ("NAV") of funds in Jersey increased by 26% in the 12 months to September 2005 to a new high of £122 billion, and the total number of funds has increased by almost 18% to 906 funds comprising 2,358 separate investment pools.

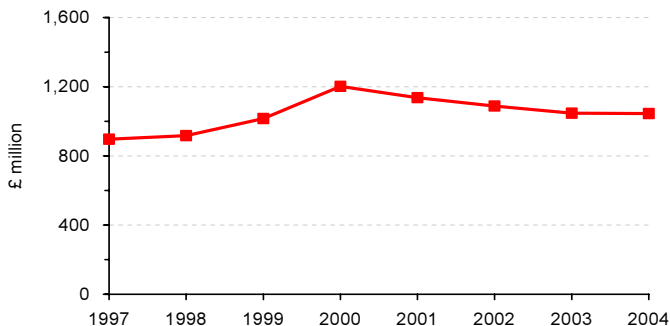
6. Financial Services

Survey of Financial Institutions

The States of Jersey Statistics Unit runs an annual survey of financial institutions covering banks, trust and company administrators, fund managers and accountants and legal professionals.

The total annual profit of Jersey's financial services sector in 2004 was £1,050 million. This is the same figure as 2003 and constitutes a stabilisation after the series of annual declines which took place between 2001 and 2003.

Figure 6.1 Estimated Total Profit for Jersey's Financial Services Sector, 1997-2004

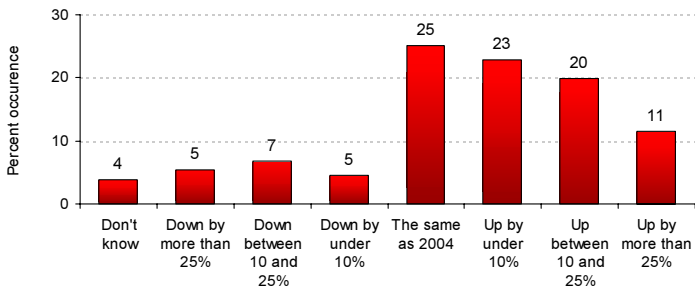


Between 2003 and 2004, profits for trust and company administrators (including legal firms)⁵ and fund managers both increased by about 5%. Over the same period, profits for banks fell by 1%, compared to the 7% fall noted for banks between 2002 and 2003.

In 2004, the annual profit of the banking sub-sector was £820 million. Profits for the other sub sectors were: fund management £108 million trust; and company administration (including legal) £103 million; and accountancy £17 million.

Businesses were asked how they anticipated annual profits for 2005 might compare with their actual profits achieved in 2004. More than three times as many firms forecast that profits would increase during the next 12-month period (calendar 2005) rather than fall. This level of optimism was higher than in the previous round of the survey. The larger firms were generally more optimistic for 2005 than they were for 2004.

⁵ Results of the legal sub-sector were analysed separately in the 2004 round of the survey for the first time. Legal firms were previously included as part of the trust and company administration sub-sector.

Figure 6.2 Expected Change in Profits of Financial Institutions for 2005 relative to 2004

In the above chart the results have been weighted with respect to the number of staff in each business.

A simple count, giving each firm the same weight, resulted in 54% of firms expecting profits to rise in 2005, about a quarter (25%) expecting profits to stay about the same and a sixth (17%) expecting profits to fall. In other words, three times as many companies expect profits to rise rather than fall in 2005.

The general degree of optimism for 2005 is reiterated when weighting profit forecasts by manpower numbers: 69% of firms expected profits to rise in 2005; about a fifth (21%) expected profits to remain the same; whilst only 9% expected profits to fall.

The level of optimism was highest for firms engaged in trust and company administration, with almost two-thirds (63%) of such firms expecting profits to rise in 2005. The proportions of firms expecting profits to rise in the other sub-sectors were: banks 56%; accountancy 55%; law 53%; and fund managers 40%. Of particular significance, 14 out of the 15 largest banks (with more than 100 FTEs) forecast profits either to increase or to remain the same in 2005.

Profit per employee across the finance sector in 2004 was £94,700 per full-time equivalent (FTE)⁶ employee, around £1,000 higher than in 2003.

Total expenditure on goods and services by the finance sector was £322 million in 2004. Almost three-fifths (£187 million) of this total was spent in Jersey.

The total number of FTE staff employed in the finance sector in 2004 was 11,050. During 2004 the number of FTE staff fell by 100 compared to a fall of 500 recorded in 2003. More recent employment data shows that in the first 6 months of 2005 employment in the sector had increased by 160, the first increase since June 2002.

⁶ The number of FTE staff was estimated from the data recorded by the six-monthly Manpower Survey. Part-time employees were uniformly assumed to be equivalent to 0.5 of a full-time employee.

6. Financial Services

About three times as many firms anticipated that staff levels would increase rather than decrease during 2005.

The largest single source of new employees continues to be the industry itself, although the number of staff recruited from school or university was twice as high as in 2003. In 2004, 185 started employment coming from outside Jersey, whilst 295 left the sector and the Island, a net outflow of 110.

Table 6.3 Profit, Employment and Expenditure of Financial Institutions, 1996-2004

		1996	1998	2000	2001	2002	2003	2004
Total Profit	£m	783	917	1,203	1,137	1,089	1,047	1,047
Banks		604	673	965	914	888	829	820
Fund managers		59	119	124	102	92	103	108
Trust & co. admin (inc legal)		107	109	97	103	90	98	103
<i>of which: Trust & co. admin</i>								57
<i>Legal</i>								46(p)
Accountants		13	16	17	18	20	17	17
Total Manpower (FTE)		9,393	10,881	11,236	11,572	11,657	11,154	11,053
Banks		4,946	5,613	5,526	5,936	5,954	5,436	5,360
Fund managers		798	913	900	904	852	834	798
Trust & co. admin (inc legal)		2,884	3,584	3,980	3,867	3,958	4,194	4,178
<i>of which: Trust & co. admin</i>		1,698	2,140	2,275	1,982	2,035	2,256	2,208
<i>Legal</i>		1,196	1,444	1,705	1,886	1,923	1,939	1,971
Accountants		763	771	830	865	893	690	717
Average Profit per FTE employee	£k	83.4	84.4	107.0	98.7	93.4	93.8	94.7
Total Expenditure (Jersey & elsewhere)	£m						292	322
Total Expenditure (Jersey only)	£m	137	183	207	196	187	174	187
Total Expenditure on employment	£m	242	306	376	415	447	455	467
Average employment cost per FTE	£k	25.8	28.2	33.5	36.0	38.4	40.8	42.2

(p) provisional

All numbers have been rounded independently

Further reading: Survey of Financial Institutions, 2004. Published annually by the Statistics Unit.

7. Tourism

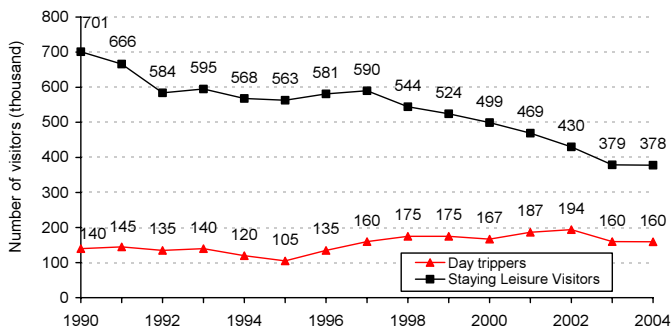
Number of Staying Visitors and Day Trippers

Between 2003 and 2004, the total number of staying leisure visitors fell by 0.3% to 377,820. This fall in leisure visitors was significantly less than in previous years. The number of leisure day trippers fell by 9% between 2003 and 2004. Total on-Island visitor expenditure was £215 million, an average of £294 per visitor (all categories).

Table 7.1 Visitor Expenditure, Volume and Occupancy Rates, 2004

On-Island Visitor Expenditure	£215 million
Total Tourism Visitor Volume	731,000
Staying Leisure Visitor Volume	377,900
Staying Business Visitor Volume	60,900
Staying Conference Visitor Volume	5,500
Day Tripper Visitor Volume	159,600
Registered accommodation establishments	168
Registered tourism bed spaces	13,710
Total bed nights available over year	3.4 million
Total bed nights sold over year	2.2 million
Total room nights sold over year	1.0 million
Average yearly room space occupancy	69%
Average yearly bed space occupancy	63%

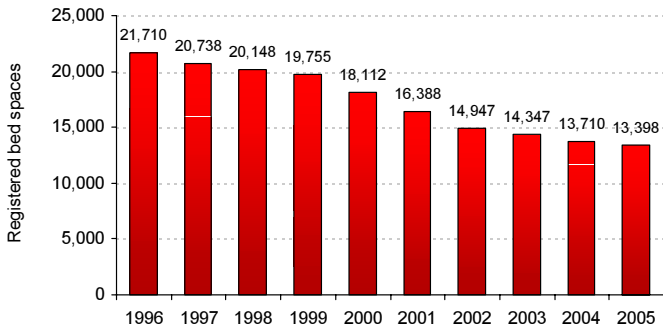
Figure 7.1 Number of Staying Leisure and Day Visitors, 1990-2004



7. Tourism

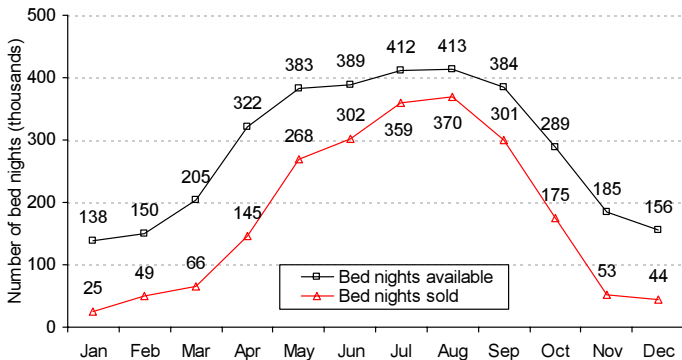
The number of registered bed spaces has reduced by almost two-fifths over the past ten years, although the rate of decline has slowed considerably during the past four years.

Figure 7.2 Number of Registered Bed Spaces, 1996-2005



The room occupancy rate for 2004 was 69%, whilst the bed occupancy rate was 63%. Reflecting the seasonality of tourism in Jersey, the lowest occupancy rates occurred between January to March and November to December.

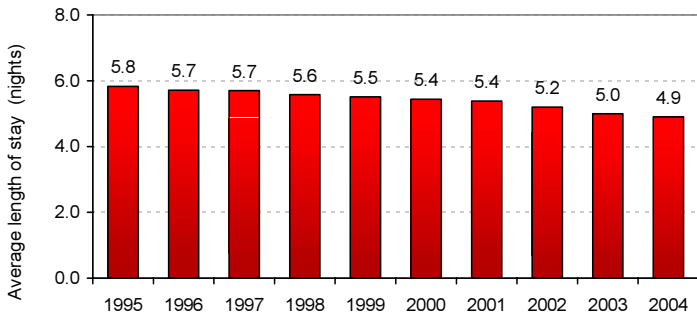
Figure 7.3 Number of Bed Nights Available and Number Sold, 2004



Length of Stay of Staying Leisure Visitors

Between 1995 and 2004 the average number of nights spent in Jersey by leisure visitors has reduced from 5.8 to 4.9.

Figure 7.4 Average Length of Stay of Staying Leisure Visitors, 1995-2004

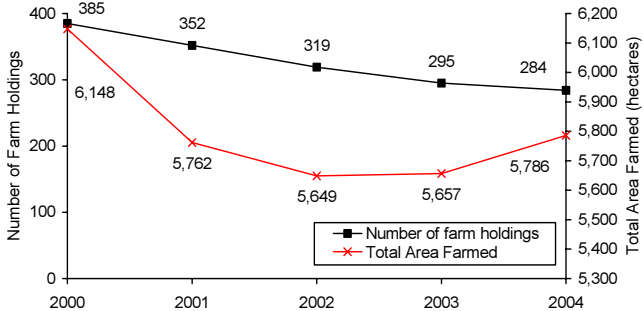


Further reading: Jersey Tourism Annual Statistical Reports.

8. Agriculture and Fisheries

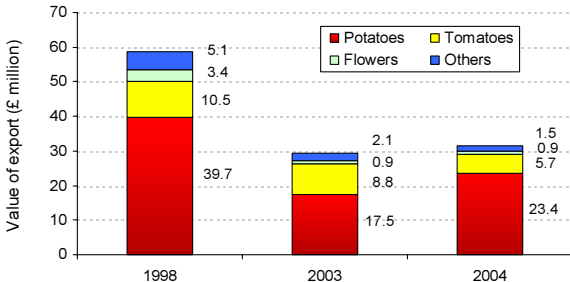
Between 2000 and 2004 the number of arable farms in Jersey reduced by more than a quarter (26%). More recently the number of farms has decreased between 2003 and 2004 but the total area farmed increased by 130 hectares, meaning that a farm's average size has increased and now stands at about 20 hectares (113 vergées).

Figure 8.1 Number of Farm Holdings and Average Size, 2000-2004



In real terms (allowing for inflation), the total value of exported arable crops fell by almost half between 1998 and 2004. The export value (in real terms) of potatoes rose by about a third (£5.9 million) from 2003 to 2004 but that of tomatoes fell by about a third (£3.1 million) during the same period.

Figure 8.2 Value of Export Arable Crops, 1998, 2003 and 2004
(£ million expressed in 2004 Prices)



Source: Jersey Agriculture. Further Reading: Agriculture and Fisheries Annual Reports.

Table 8.1 Fish and aquaculture annual yield and landed catch value

Capture fisheries	Annual yield (tonnes)					Landed catch values ³ , 2004			
	1998	1999	2000	2001	2002	2003	2004	Price per kg(£)	Total value (£,000)
Lobster	157	153	128	130	157	167	167	15.0	2,505
Brown crab	521	473	440	447	524	540	541	1.2	649
Scallop (dredging and diving)	198	218	258	370	381	313	191	2.0	382
Spider crab	160	175	172	236	270	233	223	1.22	68
Whelk	135	8	338	519	204	134	147	0.5	73
Crawfish	0.7	1.3	1.6	1.0	0.9	0.6	0.6	20.0	11
Other ¹	22	28	29	44	24	9	7	*	13
Shellfish Sub Total	1,192	1,056	1,366	1,747	1,559	1,396	1,276		4,284
Skate/Ray	51	70	53	91	59	88	52	2.5	131
Bass	18	15	17	15	21	25	19	6.6	126
Sea Bream	115	132	57	94	107	135	48	2.5	120
Sole	17	18	21	20	15	15	7	8.0	54
Mullet (grey and red)	11	13	9	11	9	12	7	*	18
Pollack	23	18	11	17	12	13	10	1.5	15
Dogfish (lesser and greater)	20	11	22	22	19	16	24	*	12
Mackerel (including horse mackerel)	34	26	13	18	19	13	8	*	9
Conger	14	11	14	20	13	25	12	0.5	6
Other ²	80	71	37	49	37	24	15	*	49
Wet fish Sub Total	501	471	333	447	395	433	271		537
Aquaculture									
Pacific oyster	197	188	241	390	476	560	721		
Mussel	0	8	58	78	96	108	25		
King scallop	3	2	2	2	2	1	4		
Total area farmed (hectares)	207	207	213	220	155	155	155		
Sub Total	200	198	300	470	574	670	749		1,047
Total Production	1,893	1,724	1,999	2,663	2,528	2,500	2,297		5,869

¹ Includes Cuttlefish, Prawns, Squid and Velvet Crab.

² Includes Angler, Brill, Cod, Garfish, Gurnard, Haddock, Hake, John Dorey, Lemon Sole, Ling, Megrims, Plaice, Sandeel, Tope, Turbot and Whiting.

³ Indicates first hand landed prices. The total value of the local catch may be much more because the catch will be sold on before reaching consumers.

* Indicates no individual price since more than one variety.

Source: Environment Department

Further reading: Agriculture and Fisheries Annual Reports.

9. Size and Land Cover of Jersey

9. Size and Land Cover of Jersey

Jersey has a total surface area of 118.2 square kilometres (km²)⁷ and is divided into 12 civil parishes, ranging in size from St Clement (4.2 km²) to St Ouen (15.0 km²).

In 1997, more than a fifth of the land area was developed, a fifth was grassland and almost a third was arable.

Table 9.1 Area of Jersey by Parish

	Acres	Vergées	Square miles	Square kilometres	Percent of Island area
St Ouen	3,707	8,341	5.8	15.0	13
St Brelade	3,157	7,103	4.9	12.8	11
Trinity	3,030	6,817	4.7	12.3	10
St Peter	2,875	6,469	4.5	11.6	10
St Helier*	2,550	5,738	4.0	10.6	9
St Martin	2,455	5,524	3.8	9.9	8
St Lawrence	2,337	5,257	3.7	9.5	8
St Saviour	2,296	5,166	3.6	9.3	8
St John	2,154	4,846	3.4	8.7	7
Grouville	1,935	4,354	3.0	7.8	6
St Mary	1,602	3,605	2.5	6.5	5
St Clement	1,044	2,349	1.6	4.2	4
TOTAL	29,142	65,569	46.0	118.2	100

* The area of St Helier includes reclaimed land area of 957 Vergées (2 km²).

Table 9.2 Land Cover of Jersey, 1997

Land cover type	Area (Vergées)	Area %
Arable	20,672	29.3
Grassland	15,469	21.9
Development	14,758	20.9
Semi-natural	6,317	9.0
Inter-tidal	4,706	6.7
Woodland	4,472	6.3
Multi-classed	4,004	5.7
Inland water	251	0.4
Unclassified	2	<0.1
TOTAL	70,681	100.0

Area includes inter-tidal zone and reclaimed land.

Further reading: CLEVER-Mapping of Land Cover in Jersey.

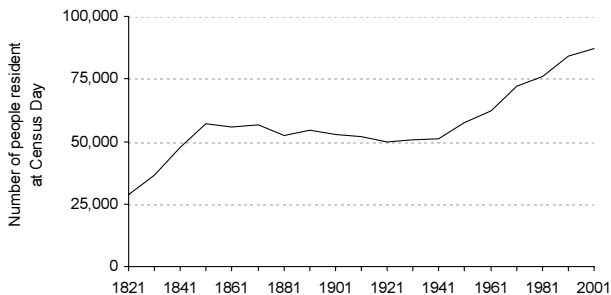
⁷ Including reclaimed land at St Helier.

10. Population

Total Population

The resident population of Jersey at the end of 2004 was estimated as 87,700, which represents an increase of about 100 from December 2003. The net increase was comprised of an increase of 220 due to natural growth (the excess of births over deaths, with the number of deaths in 2004 being the lowest for 37 years) and a decrease of 120 due to net outward migration. On 11 March 2001 (Census Day), the resident population in Jersey was 87,186.

Figure 10.1 Jersey's Population, 1821-2001



Population figures from 1981 to 2001 are for the total resident population (i.e. excluding short-term visitors but including temporarily absent residents); those from 1961 to 1976 exclude visitors but include an estimate of the number of absent residents. Population figures from 1821 to 1951 include visitors but exclude temporarily absent residents.

Table 10.1 Total Resident Population, 1981-2004

	Total
1981	76,050
1986	80,212
1989	82,809
1991	84,082
1996	85,150
2000	87,100
2001	87,186
2001*	87,400
2002*	87,600
2003*(r)	87,600
2004*(p)	87,700

(r): revised; (p) provisional.

*estimated using Census 2001 (11 March) population and annual birth, death, employment, health and education data (as at end of December each year).

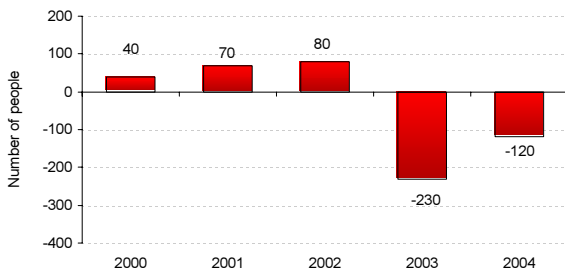
10. Population

Migration

Migration into and out of the Island consists of a dynamic “ebb and flow” of migrants in both directions (excluding the annual movement of some 4,000 short-term seasonal workers present in the Island for less than one year).

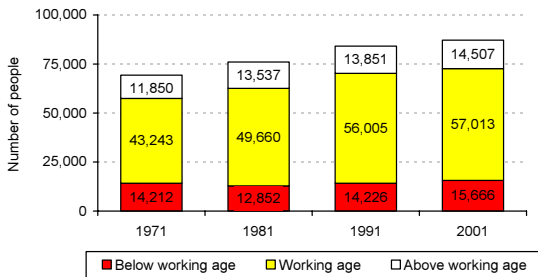
The net migration in a given calendar year is therefore the difference between two much greater numbers, those arriving less those leaving. The three years 2000-2002 were characterised by small net inward migration of less than 100 per year, reflecting the general stability of the labour market during this period. 2003 however, saw a net outward migration of more than 200 persons, reflecting the fall in private sector employment. Net migration was again outward in 2004 as further jobs were lost, though at a lower level than in 2003.

Figure 10.2 Net Migration, 2000-2004



In 2001, almost two-thirds (65%) of the total resident population were of working age (women/men aged 16-59/64 years), 17% were above working age and 18% below working age. These proportions have been substantially constant since 1981, although the absolute numbers in each category have increased.

Figure 10.3 Age Structure with Respect to Working Age, 1971-2001



Note: school leaving age increased in 1992 from 15 to 16 years of age.

On March 2001, over three-quarters of the resident population of Jersey possessed housing qualifications within the 'a-h' category. At that time, about a fifth of the resident population were non-locally qualified under the Housing Regulations in effect at the time.

Table 10.2 Residential qualifications of the Resident Population, 2001

Categories*	Percentage of population aged 16 and over**
a - h	77
j - k	2
Non-qualified	21

*As defined under the Housing Regulations.

**Individuals aged 15 and under do not possess residential qualifications.

Table 10.3 Population by Residential Qualification and Year of Arrival, 2001

Year of arrival	Qualified	Non-qualified	Children < 16 yrs	Total
At birth	29,850		13,715	43,560
Before 1980	18,950			18,950
1980	825			825
1981	650			655
1982	590	145		730
1983	550	165		720
1984	515	230		740
1985	555	270	5	825
1986	520	320	20	860
1987	600	395	35	1,030
1988	545	365	35	940
1989	500	505	55	1,060
1990	485	550	60	1,095
1991	415	500	80	1,000
1992	350	455	95	905
1993	335	485	95	915
1994	420	615	125	1,160
1995	475	740	150	1,365
1996	555	745	180	1,480
1997	495	815	195	1,505
1998	505	960	195	1,660
1999	565	985	245	1,795
2000	635	1,565	330	2,535
2001	140	675	55	870
Total	60,025	11,485	15,665	87,185

Numbers are rounded independently to the nearest 5; cells containing 0 or a non-zero number less than 3 have been left blank.

10. Population

Population Density

The population density of Jersey is approximately triple that of England, but a fifth (20%) less than that of Guernsey.

Table 10.4 Population Density of Jersey and Other Jurisdictions

	Population	Area (km2)	Density (per km2)
Jersey* (2004)	87,700	116	760
Guernsey	59,807	63	950
Isle of Man	76,315	572	130
United Kingdom	58,789,000	242,910	240
England	49,139,000	130,422	380

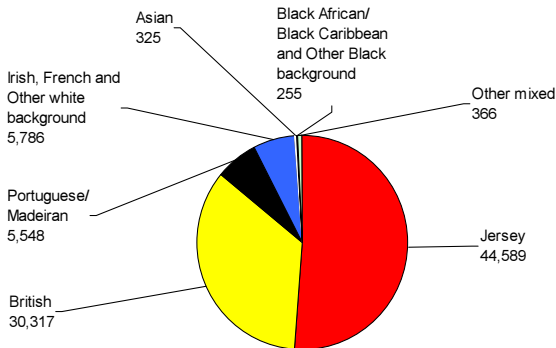
Population figures for jurisdictions other than Jersey are from the corresponding 2001 Censuses.

* If the 2 km² of the St Helier reclamation site are included in the total area of Jersey, the population density is 740 per km².

Ethnic and Cultural Background

At the time of the 2001 Census, approximately half of the resident population considered themselves to be of Jersey cultural background. More than a third (35%) thought of themselves as British, whilst 6% of the population considered themselves to be Portuguese or Madeiran.

Figure 10.4 Cultural Background of the Jersey Resident Population, 2001



Figures are the number of residents in each self-designated ethnic/cultural category.

Further reading: Population update 2004, published annually by the Statistics Unit.

Further reading: 'Report on the Jersey Census, 2001', published by the Statistics Unit.

11. Households

Private Households

The number of private households in Jersey recorded in the 2001 Census was 35,562.

Owner-occupier households accounted for approximately half (51%) of all private households. About one in seven (14%) private households lived in social-rented accommodation as States of Jersey, housing trust/association or Parish tenants. The corresponding figures for Great Britain in 2000 were 68% of households being owner occupiers and 21% renting from the social sector.

Table 11.1 Tenure of Private Households, 2001

	Households	% of total
Owner-occupier	18,031	51
States, housing trust/association or Parish tenancy	5,017	14
Private rental accommodation	7,857	22
Tied (staff) accommodation	1,700	5
Private lodging	1,539	4
Registered Lodging House	1,269	4
Other	149	+
Total	35,562	

+ represents a non-zero percentage less than 0.5.

Number of Persons per Household

The average number of people per private household has slightly reduced between the 1971 and 2001 Censuses^a.

Table 11.2 Average Number of Persons per Household, 1971-2001

	1971	1981	1991	1996	2001
Average number of persons per household	2.79	2.59	2.47	2.41	2.38

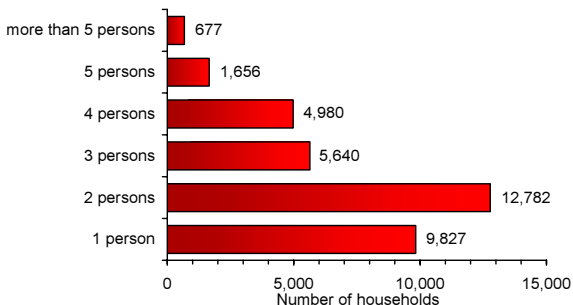
^aThe total number of private households and the average number of persons per household are not strictly comparable to earlier censuses because households living as independent units in lodging houses and staff accommodation were treated as private households for the first time in 2001; there were 1,801 such households recorded by the 2001 Census.

11. Households

Size of Households

Two person households, followed by one person households, were the most common size of household in Jersey in March 2001.

Figure 11.1 Number of Households by Size, 2001



Number of Rooms

The most common number of rooms occupied per household in 2001 was between four and six (excluding bathrooms, toilets, halls, landings or rooms used for storage).

Table 11.3 Number of Rooms Occupied by each Private Household, 2001

	1	2	3	4-6	7-9	10 or more
Percentage of all private households	5	7	15	51	17	4

Further reading: Report on the Jersey Census, 2001, published by the Statistics Unit.

12. Housing

Type of Dwelling Occupied

A total of 30,742 dwelling units were recorded as occupied at the time of the 2001 Census. The total dwelling stock (including vacant dwellings) was 32,704 units.

59% of private households were living in a whole house or bungalow, half of which were detached units. A further 21% of households lived in a purpose-built flat, and the remaining 20% were living in part of a converted house, commercial building or temporary structure.

Table 12.1 Private Households by Type of Dwelling Occupied, 2001

Type of dwelling	Number of Private households	% of all Private households
Whole house or bungalow		
Detached	10,401	29
Semi-detached	6,782	19
Terraced	3,879	11
Flat, maisonette, apartment		
Purpose-built	7,510	21
Part of converted house	5,799	16
In a commercial building	1,068	3
Temporary or mobile structure	123	+
Total	35,562	100

+ represents a non-zero percentage less than 0.5. Percentages may not add to 100 due to rounding.

Table 12.2 Private Households by Type of Dwelling and Tenure, 2001

	Whole house or bungalow			Flat, maisonette, apartment			Total
	Detached	Semi-detached	Terraced	Purpose built	Part of converted house	Commercial building	
Tenure							
Owner-occupier	8,308	4,486	2,469	1,758	920	85	18,026
Social-rented	139	741	480	3,521	118	18	5,017
Private Rental	1,553	1,207	729	1,542	2,304	519	7,854
Tied (staff)	158	128	60	296	621	322	1,700*
Private Lodging	195	181	105	116	888	54	1,539
Lodging House	+	8	16	268	929	47	1,268
Other	47	31	20	9	19	23	149

* includes 115 households in temporary or mobile housing units

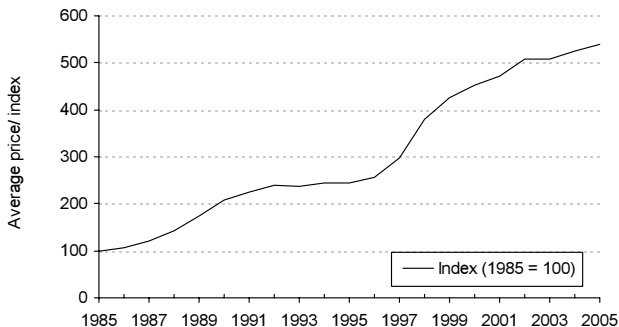
+ represents a non-zero number less than six.

12. Housing

The Jersey House Price Index

Between 1992 and 2002, the cost of a three-bedroom house in Jersey almost doubled. More recently prices have been stable or increasing at a rate of around 3% per year.

Figure 12.1 The Jersey House Price Index, 1985-2005



In 2003 a new methodology was developed to calculate the Jersey House Price Index. The new methodology incorporates the prices of one and two bed-roomed flats and two, three and four bed-roomed houses and thus provides a more comprehensive measure of changes in property prices in Jersey. In the chart above the old index (based on three bed-roomed houses) is used for years prior to 2002.

The overall average price of dwellings in Jersey has remained reasonably stable during the past two years, but with some property-type specific movements.

Table 12.3 Average Prices (£,000) for Individual Property Types, 2002-2005

Period		Flats		Houses		
		1-bed	2-bed	2-bed	3-bed	4-bed
2002	Q1	166	213	265	332	416
	Q3	160	259	284	332	474
2003	Q1	156	216	285	328	380
	Q3	145	213	270	328	510
2004	Q1	166	219	257	351	448
	Q2	169	256	258	340	526
	Q3	153	230	266	347	446
	Q4	152	236	274	343	489
2005	Q1	121	224	264	364	458
	Q2	161	236	284	346	477
	Q3	164	250	298	366	467

The average (mix-adjusted) price of dwellings sold in Jersey in the third quarter of 2005 was £345,000. This is around 85% higher than that in the UK as a whole, and about 28% higher than in Greater London.

Table 12.4 Average Price of Dwellings Sold in Jersey and the UK, 2004-2005

	Mix-adjusted average price (£ thousands)				
	Q3 2004	Q4 2004	Q1 2005	Q2 2005	Q3 2005
Jersey	322	330	331	334	345
UK	179	180	181	183	186
England	191	192	191	192	195
Wales	138	140	142	145	148
Northern Ireland	112	114	123	125	133
Scotland	115	116	117	125	128
Greater London	265	262	263	265	270
South East (excl. London)	234	234	232	232	235
East	202	205	204	203	206
South West	198	199	200	197	200
West Midlands	160	164	161	163	167
East Midlands	157	160	158	158	160
North West	140	142	142	145	148
Yorkshire and Humber	137	139	137	142	146
North East	128	129	128	130	134

Prices are rounded to the nearest £1,000.

First Time Buyers

There are a number of sites in Jersey which have had dwellings built exclusively to be available at a more affordable price to First Time Buyers (FTB). Due to the relatively small number of such transactions, FTB properties are presented on an annual basis and only at a combined flat and house level.

Table 12.5 First Time Buyer Properties, 2002-2005. (Prices are in £ thousands)

	2002	2003	2004	2005 (Q1-Q3)
Flats				
Mean price	160	186	215	200
Transactions	59	52	23	5
Houses				
Mean price	222	239	292	270
Transactions	44	18	11	87

Fluctuations in the annual mean price of FTB properties can occur for a number of reasons, including: the relatively small number of transactions of such properties taking place each

12. Housing

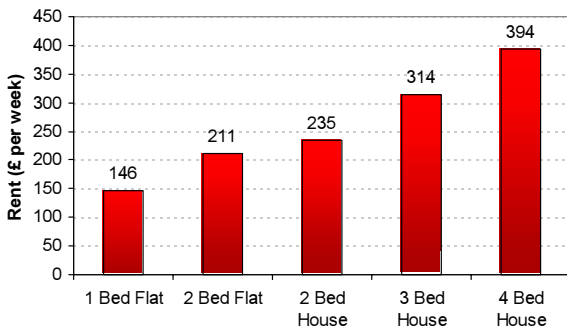
year; and specific FTB sites vary somewhat in designated price and as such the annual figures reflect which site has come onto the market in a given year. For example, flats in Woodville Apartments in 2002 were generally available at a lower price than those in Albert Place in 2003.

Between 2002 and 2005, 299 purpose built first time buyers homes were completed. This represents completions at a greater rate than over the previous 15 years when about 1,000 FTB homes were completed in total.

House Rents

In 2005 the average weekly private rental cost of a three bedroom house was £314, whilst the cost of renting a two bed flat was around £211. However, as with house prices, the cost of renting any specific property will be determined by various factors including location, condition and facilities.

Figure 12.2 Average Weekly Rental Costs, 2005 (£/week)



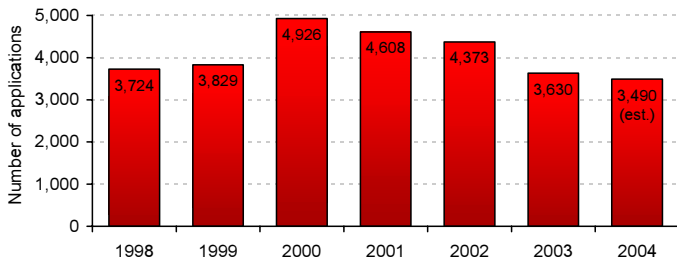
Figures compiled using Housing Department consents data.

Further reading: Jersey House Price Index, published quarterly by the Statistics Unit.

Planning Applications

The number of planning applications per year fell by almost 30% between 2000 and 2004.

Figure 12.3 Planning and Building Control Applications, 1998-2004



Source: Planning and Environment Department.

States rental waiting list

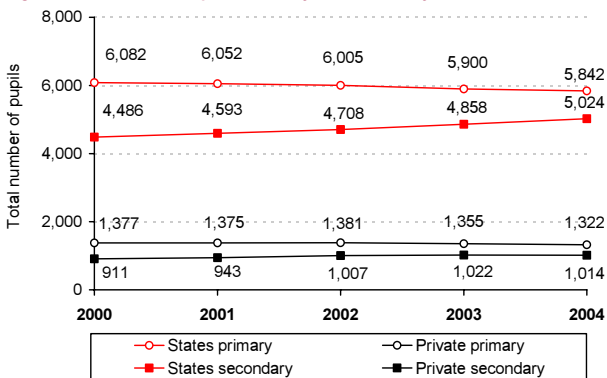
At the end of 2004 just over 200 people were on the States Rental waiting list, representing about half the number on the list at the turn of the decade and a quarter of the number in the late 1980's and early 1990's.

13. Education

Number of Pupils

The total number of children in primary and secondary education in Jersey increased by almost 350 between 2000 and 2004 (from 12,856 to 13,202), comprising an increase of 641 in secondary schools and a decrease of 295 in primary schools.

Figure 13.1 Number of Pupils in Primary and Secondary Education, 2000-2004



Figures are for January of each year.

The number of children undergoing special needs education increased by more than 40% between 1998 and 2000. Since then, although the number has fallen, the proportion of pupils with special needs has increased.

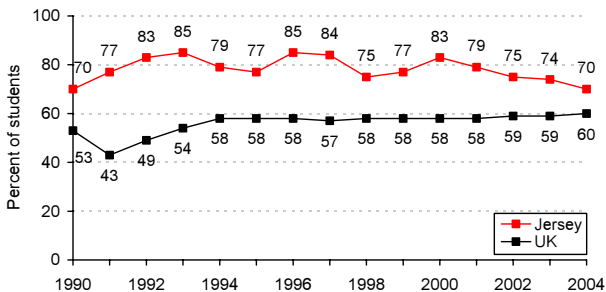
Table 13.1 Children with Special Educational Needs, 1998-2004

	1998	1999	2000	2001	2002	2003	2004
Children with special educational needs	252	318	364	379	370	346	308
Percentage of total pupils aged 5-16 years	2.2	2.7	3.0	3.1	3.0	2.8	3.3

Students Remaining in Education

In 2004, 70% of Jersey students stayed on in full time education at 17 years of age compared with 60% in the UK.

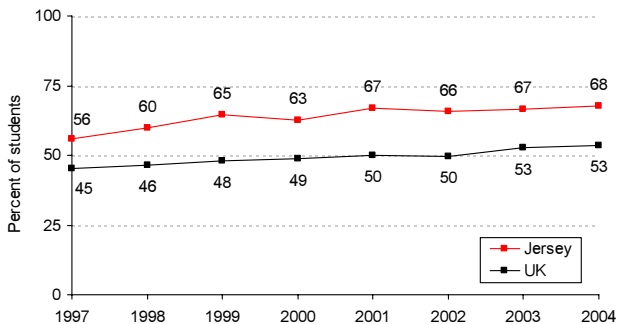
Figure 13.2 Percentage of Students Staying on in Full-Time Education at 17 Years of Age, 1990-2004



Pass Rates

Approximately two-thirds (68%) of all GCSE students in Jersey in 2004 achieved five or more grades A* to C compared with about half (53%) in the UK. About four-fifths (81%) of all A level entries in Jersey in 2004 achieved grades A to C compared with about two-thirds (69%) in the UK.

Figure 13.3 Proportion of Students Achieving 5 or More GCSE's Grades A* to C, 1997-2004



Further Reading: Education Department Annual Reports.

14. Employment

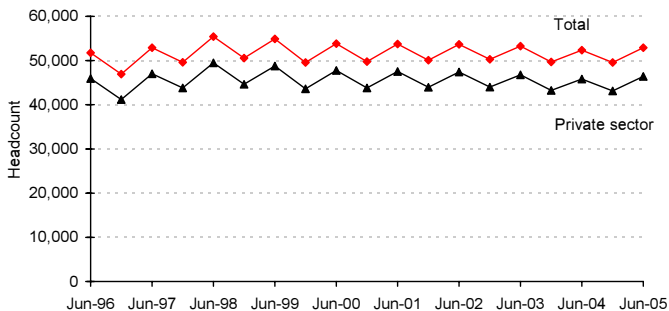
The Jersey Labour Market

In June 2005, a total of 52,910 people were employed in Jersey, around 60% of the total resident population. In the private sector (including Trading Committee⁹ and single person enterprises) 46,420 were employed in June 2005, 600 (1.3%) more than a year earlier. Public sector employment was 6,490, which was 60 (0.9%) less than a year earlier.

There is a fair degree of seasonality in the Jersey labour market, with around 3,500 more people employed in the summer than in the winter. The main drivers are the Agriculture sector which employed about 300 more people in June 2005 than in December 2004; Hotels, restaurants and bars employed around 2,000 more people in the summer; and the Transport and communications sector around 200 more.

Around 82% of all people employed were locally qualified (as defined by the Regulation of Undertakings and Development Law), a further 2% were j category and 16% (representing almost one in six workers) were not locally qualified.

Figure 14.1 Employment (headcount) in the Private and Public Sectors, 1996-2005

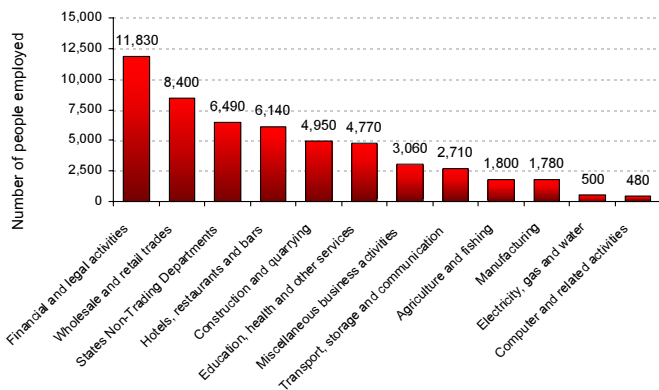


Employment by Sector

In June 2005, almost a quarter (22.4% or 11,830 people) of Jersey's workers were employed in Financial and legal services. The next largest sectors in terms of employment were Wholesale and retail trades (15.9% or 8,400 people) and the Public Sector (excluding States Trading Committees⁹) which accounted for about an eighth of total employment.

⁹ Jersey Airport, Harbours, Postal Administration and Jersey Telecom.

Figure 14.2 Sectoral Breakdown of Employment (Headcount), June 2005



Note: Transport, storage and communication includes States Trading Committees.

In December 2004 there were nearly 5,000 private sector firms in Jersey. Of these nearly three quarters (74%) employed less than 6 people. The greatest proportions of small business were in the Construction and Other business activity sectors at over 80%. As would be expected, the finance sector had the fewer proportion of small businesses (55%), but the greatest proportion of large businesses (employing more than 20 people) at 22%.

Table 14.1 Number of Firms and Employees by Sector (Private sector only), 31 Dec 2004

Sector	Number of companies by size of workforce			Total	Total number of employees
	1-5	6-20	21+		
Agriculture and Fishing	213	59	13	285	1,464
Manufacturing ¹	145	43	12	200	2,245
Construction and Quarrying	747	158	35	940	4,552
Wholesale and retail	732	178	53	963	8,536
Hotels, restaurants and bars	247	124	37	408	4,126
Transport, storage and communication ²	169	32	20	221	2,466
Finance	228	92	91	411	11,677
Other business activities ³	1,246	212	62	1,520	7,824
Total	3,727	898	323	4,948	42,890

¹ Including Electricity, gas and water.

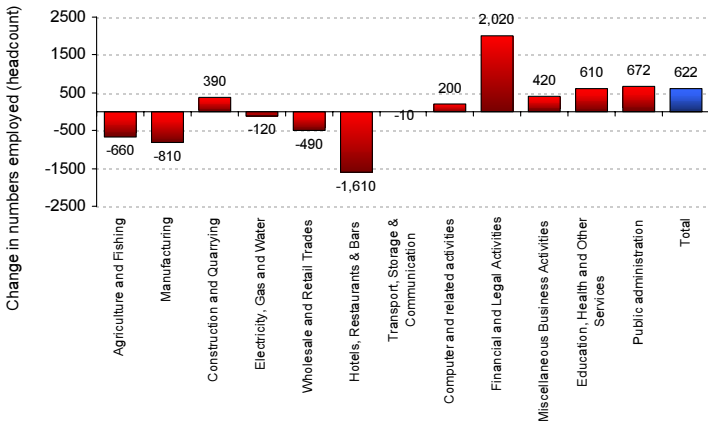
² Including States Trading Committees.

³ Including Computing and private sector Education, health and other services.

14. Employment

Employment in Jersey has changed towards a more service-oriented economy over the past few years. Employment in Agriculture, Manufacturing and Tourism-oriented activities has declined, but has risen in Financial, and public and private sector services. More than 80% of the growth in the public sector between 1996 and 2004 has been in the Education and Health departments.

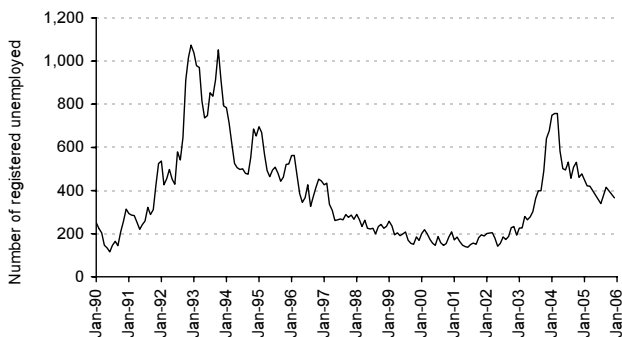
Figure 14.3 Change in Employment by Sector, 1996-2005



Unemployment

The number of people registered as unemployed in Jersey increased throughout 2003 and attained 760 in early 2004. Registered unemployment has since declined, to 366 by December 2005. Due to the absence of unemployment benefit in Jersey, the number of registered unemployed is as an indicator rather than a measure of actual unemployment.

Figure 14.4 Registered Unemployment, 1990-2005



Further reading: *Jersey Labour Market, Biannual report by the Statistics Unit.*

Employment by Gender and Status

In relative terms, employment levels in Jersey remain high. For example in 2001, 82% of people of working age in Jersey were economically active (i.e. in work or looking for work); three-quarters (75%) of these were working full-time for an employer, and a further 11% were self-employed. Part-time workers accounted for 11% of the economically active of working age; women accounted for 90% of such part-time employees.

These activity rates resulted in there being on average 1.24 full-time equivalent employees per household in Jersey compared to 0.96 in the UK¹⁰.

The overall economic activity rate of the working age population in Jersey at the time of the 2001 Census was 4 percentage points greater than that of the UK; the same differential applied to both sexes.

Table 14.2 Working Age Population (Women/Men Aged 16-59/64 Years), 2001

	Jersey	UK
Men	87	83
Women	76	72
All	82	78

Figures are percentages of the working age population of each gender.

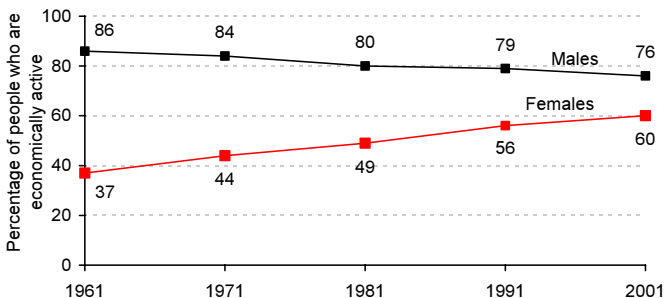
¹⁰ Jersey data are from the 2001 Census; UK data from UK Social Trends No. 32 (2002 edition) and the Labour Force Survey (GB strictly rather than the UK).

14. Employment

Figure 14.5 Employment by Gender and Status, 2001



Figure 14.6 Economic Activity Rates by Gender, aged 16 and over, 1961-2001



Figures are the percentage of each gender aged 16 years and over and who were either working or seeking work.

Occupation Groups

As recorded by the 2001 Census, managers and senior officials accounted for almost a sixth of the employed economically active workforce; a similar proportion were engaged in skilled trades; people in administrative and secretarial positions accounted for almost a fifth of the total.

Table 14.3 Table Major Occupation Group by Gender, 2001

Occupation	Males	Females	Occupation Total	% of overall total	% in UK
Managers & Senior Officials	5,038	2,109	7,147	16	13
Professional Occupations	1,894	1,434	3,328	7	12
Associate Professional & Technical	2,895	3,300	6,195	14	13
Administrative & Secretarial	1,722	6,890	8,612	19	14
Skilled Trades Occupations	6,326	365	6,691	15	10
Personal Service Occupations	445	2,466	2,911	6	7
Sales & Customer Service Occupations	1,010	1,804	2,814	6	9
Process, Plant & Machine Operatives	1,996	127	2,123	5	8
Elementary Occupations	3,504	2,252	5,756	13	13
TOTAL	24,830	20,747	45,577	100	100

(Percentages do not add up to 100 due to rounding to the nearest integer).

Number of Hours Worked

At the time of the 2001 Census, full-time employees in Jersey worked an average of 39.5 hours per week. This figure represents a further slight reduction from the number of hours worked recorded in the 1996 (39.7 hours) and 1991 (40.2 hours) Censuses.

In 2001, the self-employed worked on average 42.8 hours per week, over three hours more per week than that of full-time employees. Men in full-time employment worked on average almost 3½ hours more per week than women.

Table 14.4 Average Number of Hours Worked per Week by Employees, 2001

Full-time			Part-time			Full & Part-time		
Male	Female	All	Male	Female	All	Male	Female	All
41.0	37.6	39.5	21.2	19.6	19.8	40.5	33.3	36.9

Further reading: Report on the 2001 Jersey Census.

14. Employment

Work Permits

Between 2004 and 2005, the number of work permit applications for Jersey reduced by almost three-quarters (74%). The fall occurred predominantly in the 'Hotel and Restaurants' and 'Agriculture' sectors and was predominantly a result of the entry of 10 new nations (mainly in eastern Europe) into the EU in 2004, which ended the requirement of work permits for these nationals.

Table 14.5 Numbers of Work Permits Issued by Sector, 2000-2005

	2000	2001	2002	2003	2004	2005
Applications received	654	1,717	2,846	3,443	1,501	394
Permits refused	8	15	59	48	21	5
Applications cancelled/pending	0	3	3	25	1	0
Total Permits issued	646	1,699	2,784	3,370	1,479	389
Finance	56	72	33	18	40	71
Hotels & Restaurants	206	699	1,599	2,317	826	175
Entertainment	78	155	133	163	225	75
Agriculture	202	699	926	791	334	0
Miscellaneous	111	74	93	81	54	68

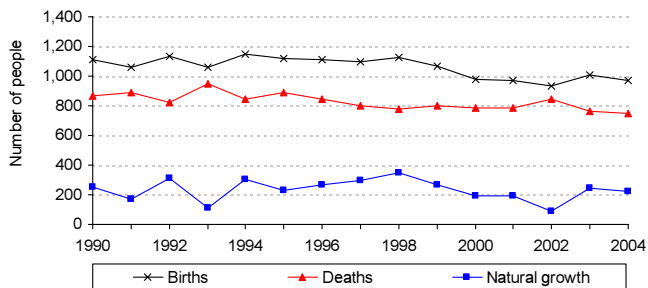
Further reading: Customs and Excise Department, Annual Reports.

15. Health

Births and Deaths

In 2004 971 births and 748 deaths were recorded in Jersey, a net natural growth of 223.

Figure 15.1 Number of Births, Deaths and Natural Growth in Population, 1990-2004



Source: States of Jersey Superintendent Registrar.

Both the crude birth rate (CBR)¹¹ and crude death rate (CDR)¹¹ in Jersey reduced during the 1990's, with the CDR continuing to fall over the past 4 years.

Table 15.1 Crude Birth Rate (CBR) and Crude Death rate (CDR)

Year End	CBR	CDR
1991	12.6	10.5
1996	13.0	9.9
2000	11.2	9.0
2001	11.1	9.0
2002	10.6	9.6
2003	11.5	8.7
2004	11.1	8.5

Figures for CBR and CDR are per 1,000 residents per annum.

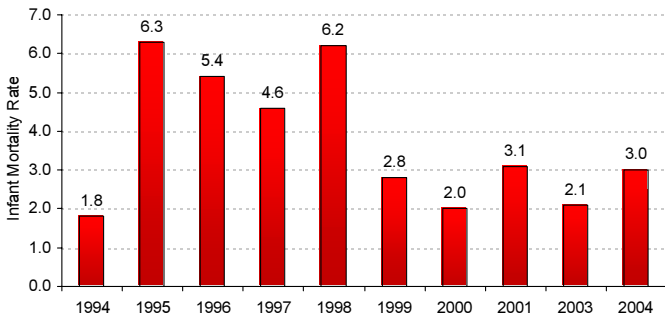
One factor contributing to the recent fall in crude death rate is that the infant mortality rate (the number of infant deaths per 100,000 live births¹²) has fallen from about 5 to 6 in the late 1990's to about 2 to 3 in the first few years of this decade.

¹¹CBR is defined as the number of live births per 1,000 residents; similarly, CDR is defined as the number of deaths per 1,000 residents.

¹²More precisely the infant mortality rate is defined as = (the number of deaths of infants under one year to resident mothers in a calendar year)/(the number of live births to resident mothers in same calendar year).

15. Health

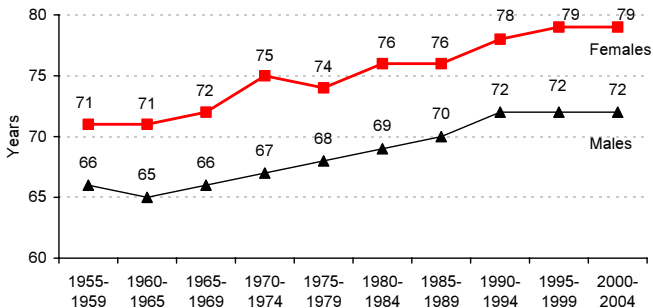
Figure 15.2 Infant Mortality Rate, 1994-2004



Life Expectancy

Life expectancy in Jersey has been increasing for both males and females. On average, women have a life expectancy 7 years longer than that of men.

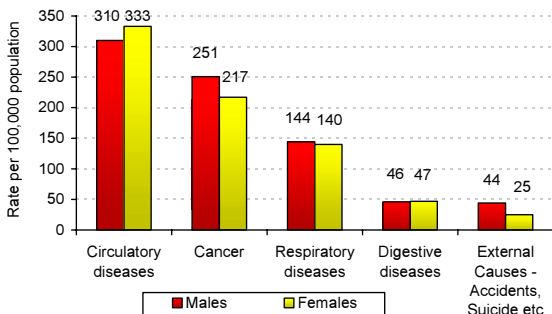
Figure 15.3 Average Age at Death, 1955-2004



Cause of Death

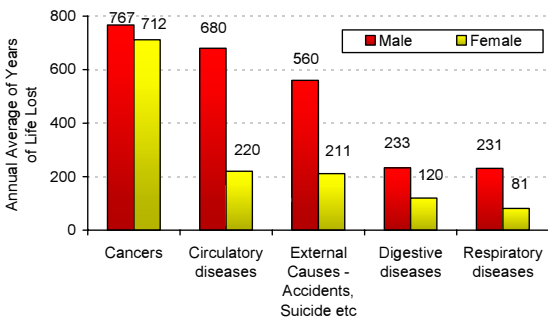
During the period 2000 to 2004, the principal causes of death were circulatory disease and cancer. Women were more likely to die from circulatory disease than men, whilst men were marginally more likely to die from cancer than women.

Figure 15.4 Principal Cause of Death, Annual Average, 2001-2004



Between 2000 and 2004, a greater proportion of deaths of people aged below 75 years was caused by cancer than circulatory disease. Men were more likely to die prematurely (before 75 years) than women, as the result of circulatory or digestive diseases or due to accidents or self harm.

Figure 15.5 Major Causes of Years of Life Lost¹³, Annual Average, 2001-2004



Source (above charts): Health Intelligence Unit, Public Health, Health & Social Services Department.

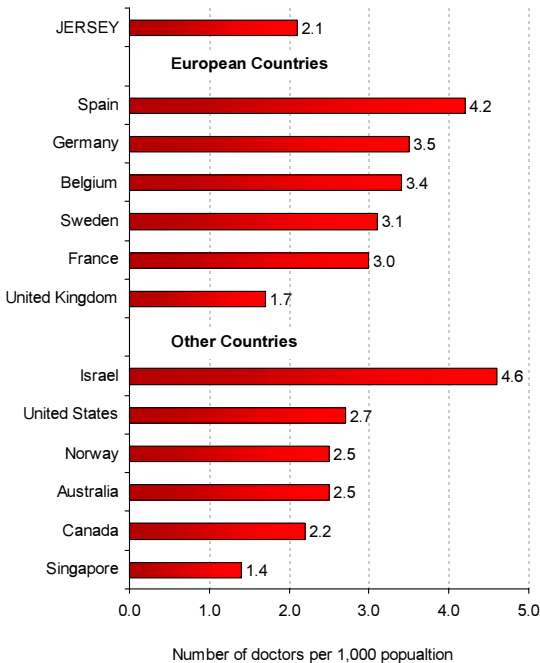
¹³ Where years of life lost is expressed as the total number of years of all those people dying before aged 75 years.

15. Health

Number of Doctors

Jersey has a higher proportion of doctors per population than the UK but a lower proportion than most western-European countries.

Figure 15.6 Number of Medical Doctors per 1,000 Population, 2001



Further reading: 'The Report on the Jersey Census, 2001' published by the Statistics Unit; 'The Economist World in Figures, 2002 Edition'.

16. Crime

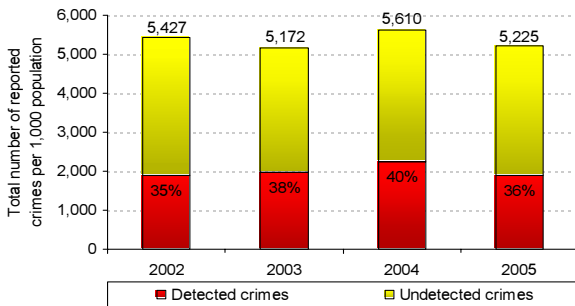
Number of Reported Offences

In 2005, there were 59.6 recorded crimes per 1,000 of the resident population, compared to 112.7 for England and Wales. About two-thirds (65%) of all recorded crime occurs in St. Helier. For six of the remaining parishes there are fewer than two crimes recorded per week.

The crime detection rate in Jersey in 2005 was 36%. The comparative figure for England and Wales is 26%. In 2005, almost a third (31%) of all detected crime was committed by youths aged under 18. In 2004, youths committed 40% of all detected crime. The sanction detection rate (where an offender is dealt with by the criminal justice system) in Jersey is 31%. The comparative figure for England and Wales is 21%

In 2005, the Police dealt with over 24,000 incidents.

Figure 16.1 Reported and detected crimes, 2002-2005



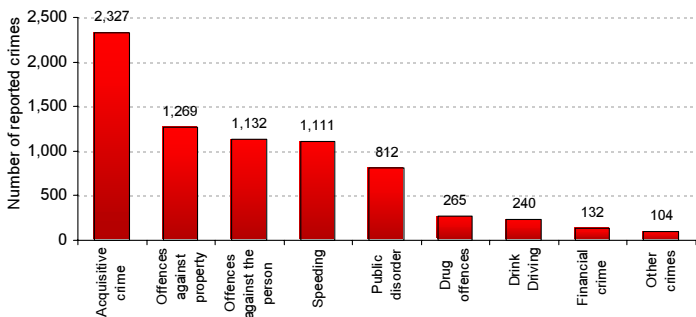
Type of Crime

The most common offence in Jersey is malicious damage of property, which accounts for almost a quarter (23%) of all recorded crime. There are about 6.7 domestic burglaries per 1,000 households in Jersey compared to 15.6 in the UK.

In 2005, there were 24 road traffic collisions (RTCs) resulting in serious or fatal injury in Jersey, a decline of 52% compared with 2004.

16. Crime

Figure 16.2 Recorded Crime, Traffic and Disorder Offences, 2005

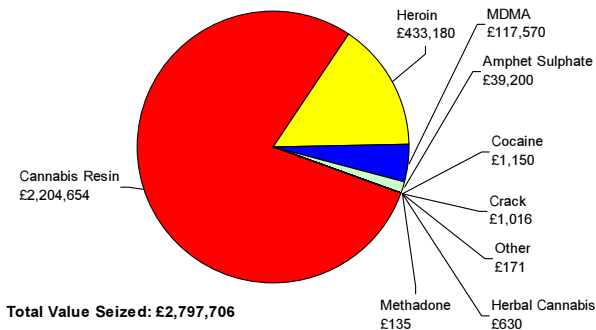


Further reading: *States of Jersey Police Annual Reports.*

Drugs

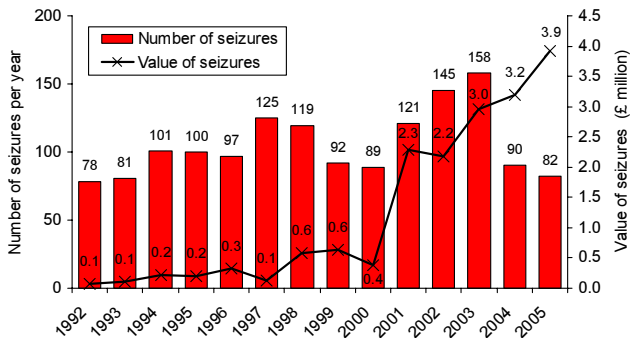
In 2005 the Customs and Immigration Service was responsible for the seizure of drugs with an estimated street value of £2.8 million. In addition, a further £1.1 million of drugs was seized as a result of joint operations with the States of Jersey police, UK police and French Customs.

Figure 16.3 Street value of Drugs Seizures by Customs and Immigration, excluding Joint Operations, 2005



The number of seizures fell again in 2005, down by 8 on the previous year and nearly half that of 2003. However the average value of each seizure, at nearly £49,000 in 2005, was £14,000 higher than in 2004 and £30,000 greater than 2003.

Figure 16.4 Seizures by the Customs and Immigration Department, including Joint Operations, Annual Number and Total Value, 1994-2005



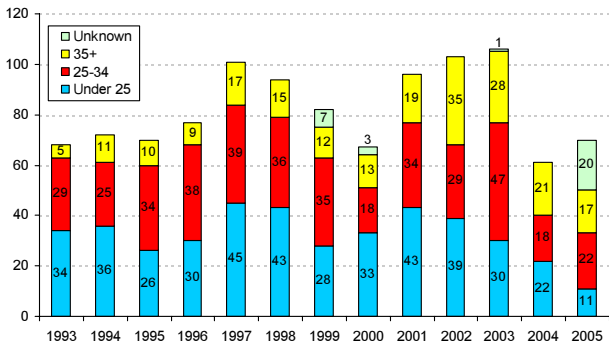
Data for 2001 onwards includes joint operations between Jersey Customs, Jersey and UK police and French Customs. Joint operations seized £1.1 million in 2005, £1.7 million in 2004, £1.2 million in 2003, £46,000 in 2002 and £480,000 in 2001.

Although slightly lower than last year, cannabis resin still accounted for 80% by value of seizures in 2005. Heroin and MDMA seizures both dramatically increased compared to 2004 with three times as much of each drug seized. Cocaine seizures fell from £16,000 in 2004 to just over £2,000 in 2005.

16. Crime

2005 saw a fall in the number of 20–24 year olds caught carrying drugs to 7 in total, compared to 19 in 2004, with other age groups following previous years' trends. A significant number of un-attributable postal seizures account for the increase in "unknown" age groups.

Figure 16.5 Age of people caught carrying drugs 1993 to 2005



Further reading: Customs and Immigration Department, Annual Reports.

17. Prison

The prison population has increased over time. The average number of prisoners held in 2005 was 172. During the year, the maximum number of prisoners held was 181, which was 14 less than the previous year.

The number of temporary releases increased more than four-fold between 2001 and 2005. In 2005 the number of work experience releases rose by 42% (1,052) compared to 2004 and there was a 32% fall in the number of breaches.

Table 17.1 Prison Population and Number of Temporary Releases, 2001-2005

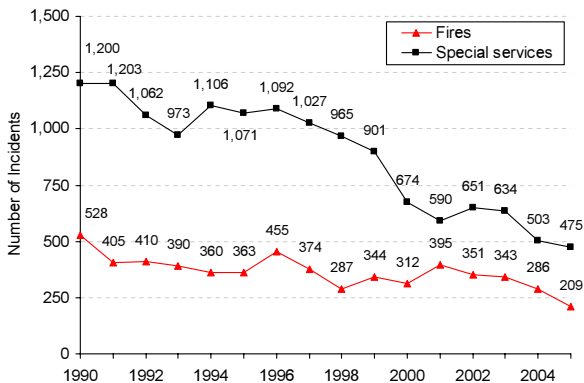
Year	Population			No. of temporary releases	Work experience	%	Breaches	%
	Min	Max	Average					
2001	127	164	140	1,414	1,142	81	10	0.7
2002	122	158	144	5,436	4,504	81	25	0.5
2003	122	187	165	7,683	4,067	53	75	1.0
2004	157	195	170	6,159	2,480	40	28	0.5
2005	158	181	172	6,048	3,532	58	19	0.3

Source: Jersey Prison Service.

18. Fire

Over the past 5 years the number of fires attended by the Fire and Rescue Service has reduced significantly due to fire prevention, education and enforcement activities. In 2005 a total of 209 fires were attended compared to 395 in 2001. Incidents attended by the Service that did not involve fires (Special Services such as Sea, Cliff and Road Traffic Rescues) also reduced, from 590 to 475 over the same period.

Figure 18.1 The Number of Incidents Attended by the Fire and Rescue Service, 1990-2005



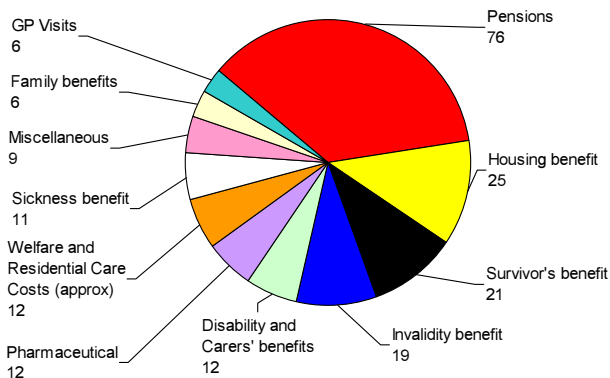
Source: States of Jersey Fire and Rescue Service

19. Social Security

In 2004, expenditure from the States Social Security Fund totalled £136.2 million, an increase of £9.6 million on 2003. Some £6 million of this increase was due to the raise in pension payments (old age and survivor's pension). Income to the Social Security Fund in 2004 was £165 million.

Total expenditure of the Health Insurance Fund in 2004 was £18.6 million, compared with £17.8 million in 2003.

Figure 19.1 Total Expenditure on Social Benefits, 2004, £million



Figures include payments for Housing and Parish Welfare contributory benefits and Health Fund expenditure (used to subsidise primary health care) and exclude administration costs.

The Parishes use a different financial year and so the native Parish welfare figure relates to the period May 2004 - April 2005, rather than the calendar year.

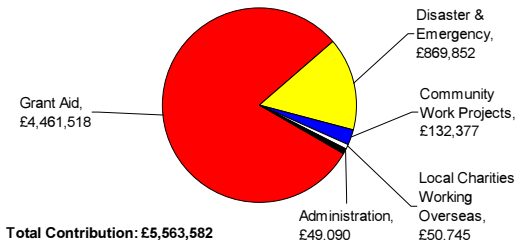
Further reading: Employment and Social Security Department, Annual Report.

20. Overseas Aid

Annual Expenditure

In 2005, the official contribution of overseas aid from Jersey was £5.56 million, of which about £4.46 million was grant aid and £0.87 million was disaster and emergency aid.

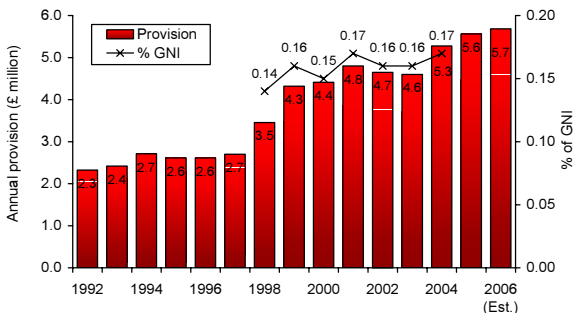
Figure 20.1 Official Aid Contribution from Jersey, 2005



Further reading: Overseas Aid Committee Annual Reports.

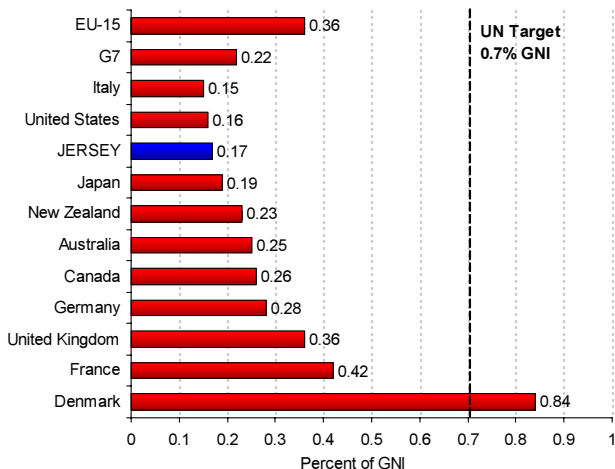
The official aid contribution from Jersey in 2005 was 5.3% more than the £5.28 million allocated in 2004. In 2004, the expenditure was 0.17% of total Gross National Income (GNI).

Figure 20.2 Jersey's Annual Overseas Aid Provision, Total and as a Percentage of GNI, 1986-2004



The UN has adopted an official development assistance target of 0.70% of GNI. Jersey's percentage contribution of its GNI is currently below that of the UK, France and the EU15 average.

Figure 20.3 Contribution of GNI to Official Development Assistance of Selected Countries, 2004



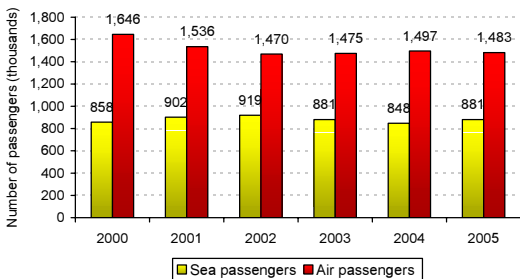
Further reading: *OECD in Figures, 2004 Edition*.

Norway, Luxembourg, Denmark, Sweden and the Netherlands are the only countries to meet the UN target of 0.7% of GNI. However Ireland, Belgium and France plan to reach this figure by 2007, 2010 and 2012 respectively.

21. Sea and Air Transport

The total number of passenger (air and sea) in 2005 was 2.36 million, marginally higher than in 2004. The number has reduced by about 6% since 2000.

Figure 21.1 Total Number of Sea and Air Passengers, 2000-2005



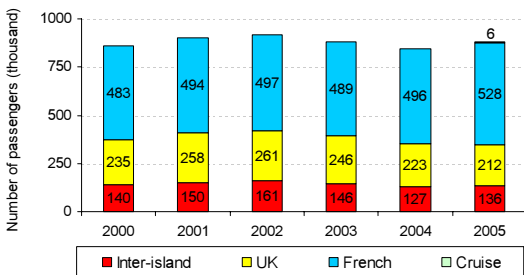
Numbers are in thousands and include both arrivals and departures, excluding air transit passengers.

Source: Jersey Harbours Department and Jersey Airport.

Sea Transport

In 2005, the total number of sea passengers (arrivals and departures) for all routes was over 880,000, an increase of about 4% from 2004.

Figure 21.2 Total Number of Sea Passengers, by Route, 2000-2005



Notes:

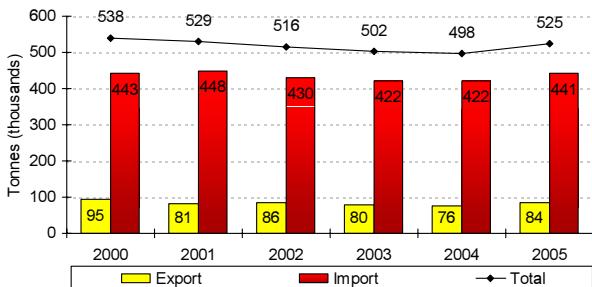
Breakdown figures for 2000-2003 are considered less accurate than 2004 onwards, although the total number of passengers are regarded as reliable. Prior to 2005, Cruise figures were included in one of the other routes (Inter Island, UK or France).

Source: Jersey Harbours Department.

Freight

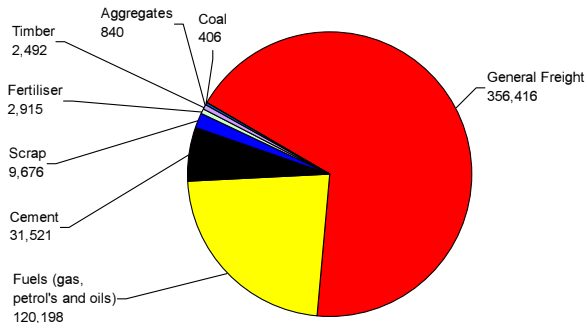
About 525,000 tonnes of freight were shipped (exports and imports combined) through St Helier in 2005. Exports from Jersey have fallen by about 12% since 2000.

Figure 22.2 Annual Sea Freight, 2000-2005



Source: Jersey Harbours Department.

Figure 22.3 Freight by Category (Import and Export), 2005, tonne



Source: Jersey Harbour Department.

21. Sea and Air Transport

Table 21.1 Containerised freight, 2004-2005

Containerised freight (tonnes)	2004	2005
Inward	265,435	282,305
Outward	66,289	74,111

Source: Jersey Harbours Department.

The amount of containerised freight entering Jersey increased by 6% between 2004 and 2005, and there was a 12% rise in the amount of tonnes leaving the island.

Further Reading: Jersey Harbour Department, Annual Report.

Air Transport

The total number of air passengers (arrivals and departures) in 2005 at 1.48 million was about 1% down on 2004.

Total UK passenger arrivals were 640,000, representing 86% of the traffic, Inter-island traffic fell slightly, by 3%, whilst International traffic rose by a small amount, up by 1%. Although down in total, with a number of routes changing during the year, the overall picture has been one of stability of passenger numbers.

Table 21.2 Passenger Arrivals and Departures, Aircraft Movements and Freight Recorded at Jersey Airport, 2005

	Arrivals	Departures	Total
UK Passengers	640,002	639,688	1,279,690
Inter-Island Passengers	70,685	70,376	141,061
Continental Passengers	31,282	31,444	62,726
Total Passengers	741,969	741,508	1,483,477
Number of Commercial Flight Movements	..	..	40,129
Number of Light Aircraft Movements	..	..	26,238
Number of Commercial Freight Movements	..	..	2,958
Number of other Movements (Military etc.)	..	..	687
Total Movements			70,012
Inward/Outward Freight (tonne)	5,765	1,333	7,098

Note: Transit Passengers, Practice Approaches and Transit Freight are excluded from these figures.

Source: Jersey Airport.

Passports**Table 21.3 Number of Passports Issued and Documents Legalised, 2004-2005**

	2004	2005
Passports issued	11,377	10,458
Documents legalised	6,650	7,766

22. Vehicle Transport

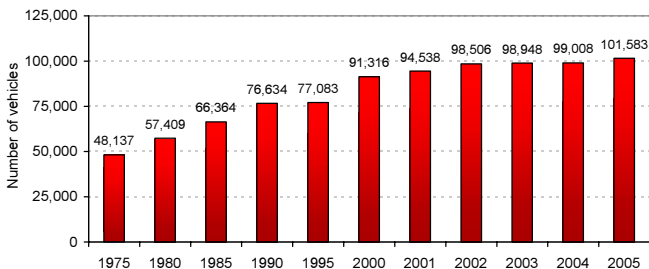
Number of Vehicles

The number of vehicle records on the Driver and Vehicle Standards (DVS) register surpassed 100,000 for the first time in 2005, reaching 101,583 by the end of the year.

This total represents a net increase of around 2,500 on 2004, and is made up of the difference between new registrations (9,511) and scrapped (2,125) and exported (4,950) vehicles. Of the new registrations 3,984 (42%) were hire cars.

At the time of the 2001 Census, the average number of private cars/vans per private household was 1.48. However, almost a sixth of all private households (5,849 out of 35,562) had no car or van for domestic use; of these 170 households had at least one motorcycle or scooter. Thus, 5,679 households had no motorised vehicle for private use at the time of the 2001 Census.

Figure 22.1 Total Number of Vehicles Registered in Jersey, 1970-2005



Figures include all cars, tractors, motorbikes etc., and commercial and private vehicles.

Figures up to 1993 include only taxed vehicles; figures after 1994 include all vehicles recorded on the DVS register as at 31 December of each year.

Driving tests

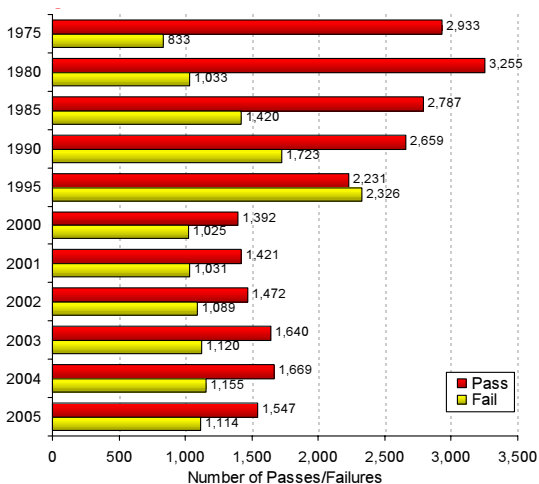
In 2005, two-thirds (67%) of all males taking a driving test passed, compared with less than half (49%) of all females. Of the 1,547 people who passed their driving test, 61% were men and 39% were women.

Table 22.1 Driving Test Results by Gender, 2005

	Male	Female	Total
Pass	938	609	1,547
Fail	469	645	1,114
Total	1,407	1,254	2,661

The number of driving tests taken per year has fallen considerably in the past five years compared to the late 1990's. In 1975 over 3,700 tests were taken compared to around 2,600 in 2005. In most years, more tests resulted in passes rather than failures, except for 1995, 1996 and 1997 when 51%, 57% and 56% resulted in failures respectively.

Figure 22.2 Driving Test Results, 1975-2005



Source: Driver and Vehicle Standards Department.

23. Communications

Numbers of Telephone Lines and Phones

The number of mobile phone users increased by 16,000 in 2005 to 99,800 which is double the number in 2000. On average each mobile phone deals with 2,535 calls and 705 text messages a year.

In contrast to the growth in mobile phones, the number of fixed lines has been fairly static for the past 3 years at around 72,000. The number of calls on these lines fell for the first time in 2005 but still represents an average of 4,736 calls per line. In 2003, the number of mobile phone customers exceeded the number of exchange lines for the first time.

Table 23.1 Numbers of Telephone Lines and Mobile Phones 1996-2005

	1996	1998	2000	2002	2003	2004	2005
Land Lines							
Total exchange lines (thousands)	64.4	68.7	74.1	74.3	73.2	72.1	72.0
Calls (million)	..	..	366	377	381	382	341
Mobile Phones							
Total customers (thousands)	6.5	18.0	44.5	72.0	79.2	83.9	99.8
Calls (million)			125	213	218	232	253
Number of text messages (million)					59.0	65.6	70.4
Number of broadband customers					6,103	8,307	12,124
Penetration of Jersey Homes					17.2%	23.4%	34.1%

Notes: Calls and text messaging statistics are yearly totals; customer number data are year-end.

Source: Jersey Telecom.

24. Energy

In 2004 total final energy consumption¹⁴ (FEC) in Jersey was 186 million toe (2,169,000 MWh) an increase of 0.7% on 2003 and 9% higher than in 1991. Two-thirds of all energy used in Jersey is a kind of petroleum product, (with petrol and diesel accounting for a quarter of final energy demand), with electricity accounting for about a quarter, gas 6% and coal 1%.

Jersey is heavily dependent on imported energy with over 97% of Jersey's primary energy needs and 95% of its electricity being imported.

Figure 24.1 Jersey's Total Final Energy Consumption by Fuel Type, 2004

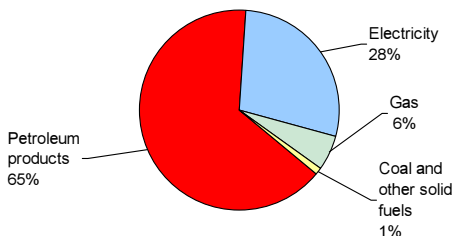
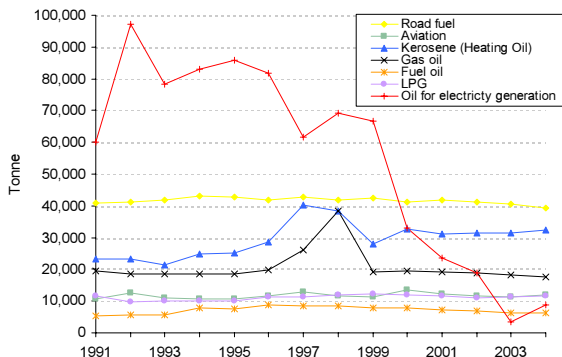


Figure 24.2 Final consumption of petroleum products



¹⁴As the name suggests final energy consumption refers to the use of energy in its final form by the consumer (i.e. the energy that is used by the ultimate consumer in heating their home, lighting a shop, powering a computer, driving a car, etc).

24. Energy

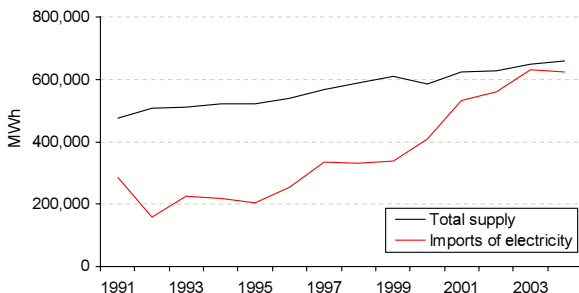
Petroleum Products

The largest change within the overall consumption of petroleum products in Jersey has been the decline in oil used to generate electricity, following the construction of the enhanced interconnector to import electricity. Consumption of heating oils has increased steadily in recent years with consumption of other fuels remaining fairly flat despite recent high global prices. Road fuel use has been fairly constant, with recent small declines reflecting a near saturation in use and improved energy efficiency.

Electricity

Electricity demand in Jersey has grown steadily over the past 14 years, by an average of about 2.1% per year. In 2004 around 595,200 MWh were consumed compared to 446,000 in 1991. Including the electricity used at the Bellozane, site total consumption in 2004 was 609,000 MWh. However, the most dramatic change within the electricity sector has been the growth in imports. Throughout most of the 1990's imports accounted for between 40 and 60% of public electricity supply, but by 2004 this had risen to over 95%.

Figure 24.3 Total Electricity Supply and Imports, 1991-2004



Note: Public electricity supply only, excludes own generation and use at Bellozane.

Of all electricity consumed, nearly a half (284,500 MWh) is consumed within private homes, including power for heat supplied to States housing. Of the remaining electricity consumed, the Wholesale and retail sector consumed around 14% and finance 11%. Government consumption was 36,400 MWh from JEC plus around 13,800 MWh at Bellozane.

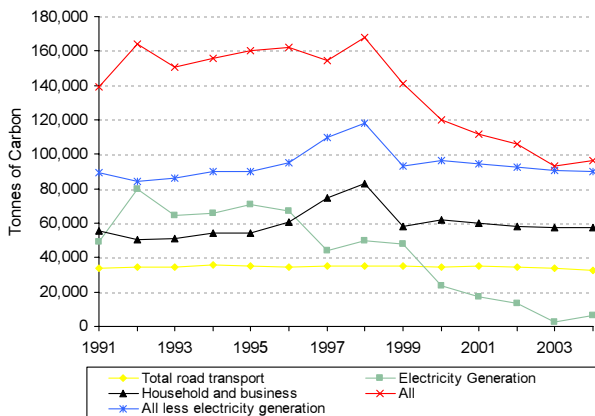
Energy related carbon emissions

Across Europe, and indeed in most countries, greater attention is being placed on the impact our activity has on the environment and in particular on efforts to reduce carbon emissions. Jersey is a signatory to the UN Convention on Climate Change, but has no specific carbon reduction target. In a global sense carbon emissions in Jersey are tiny, but with the energy data it is now possible to calculate carbon emission from energy consumption in Jersey. Carbon emissions from land use change (the conversion of countryside to building use) and agriculture are not included, nor at present are the carbon emissions from waste burning/electricity generation at Bellozane. It is also important to keep in mind that the energy data for 1991 to 2000 is not as accurate as that for the most recent years.

However, with all that in mind, overall *provisional* energy related carbon emissions in Jersey have fallen sharply, by around 30%, between 1991 and 2004, from 139,000 tonnes to 96,000 tonnes. The cause of this reduction is the switch from on-Island electricity generation to importing electricity from France.

Excluding electricity generation overall there has been very little change in carbon emissions over the past 14 years.

Chart 24.4 Energy related carbon emissions



Note: Excludes emissions from electricity generated at energy from waste plant at Bellozane. Data for 2001 onwards are considered more accurate than earlier estimates

24. Energy

The reduction in emissions resulting from the change in generation is what is called a one-off reduction, because once that change is made and the reduction achieved it can't happen again – although emissions can rise if it is reversed, even in part, as was seen in 2004. As a result of greater oil generation in 2004 carbon emissions increased by 3.6% between 2003 and 2004.

The largest sources of energy related emissions are now road transport and domestic and commercial energy use, which includes marine transport. Road emissions have decreased very gradually over the past decade as a result of greater efficiencies in engines, the phasing out of older less efficient cars and the growth in diesel (which is marginally less carbon intensive than petrol, but does cause other emissions). However, the overall trend of emissions and consumption of fuel, does perhaps suggest that Jersey is near a maximum level of road use and that whilst technical improvements are helping to reduce emissions, there is no evidence of significant behavioural change. In this sense Jersey is much like the rest of Europe.

25. Water

In 2004, over 35,000 dwelling units were connected to the mains water supply, along some 75 km of trunk mains. The total volume of water supplied in 2004 was 7,305 million litres, with the maximum daily demand being 26.5 million litres. Consumption of water has remained relatively static between 1999 and 2004, despite 4,000 more dwellings being connected to mains water during this time. Jersey Water compliance with statutory water quality standards for 2005 under the Water (Jersey) Law 1972 as Amended was 99.8%, the same as 2004.

Table 25.1 Water Connection and Consumption, 1993-2004

	Total dwelling Units on supply	Total length of service mains (km)	Total length of trunk mains (km)	Annual rainfall (mm)	Total water supply (million litres)	Maximum day's demand (million litres)	Maximum month's demand (million litres)
1993	27,812	351.57	51.68	827.3	6,556	23.9 18-Aug	664.9 August
1994	28,393	359.26	51.97	1,014.1	6,674	27.5 07-Jul	738.1 July
1995	28,886	365.41	53.08	874.7	6,622	26.9 10-Aug	709.7 August
1996	29,435	376.48	54.19	695.3	6,834	27.0 21-Jul	728.2 July
1997	29,894	385.03	56.35	757.5	6,994	25.7 20-Aug	705.3 August
1998	30,464	394.02	61.09	984.6	7,229	27.6 09-Aug	756.8 August
1999	31,276	403.64	62.25	961.4	7,269	29.7 29-Jul	794.1 July
2000	31,867	407.21	65.38	1,026.9	7,262	27.0 20-Jul	721.7 July
2001	32,559	414.64	70.11	957.8	7,317	29.4 25-Jun	733.1 June
2002	33,721	425.53	71.27	986.9	7,207	26.0 28-Jul	702.5 July
2003	34,542	433.45	75.37	756.9	7,301	28.4 13-Jul	725.9 July
2004	35,354	440.48	75.37	883.9	7,305	26.5 13-Jun	682.7 July

Further reading: *Jersey Water Annual Report and Financial Statements*.

Bathing Water Quality

The Centre for Research into Environment and Health (CREH), University of Wales, independently assesses water quality measured at Jersey beaches during the bathing season (May – September). The results were then forwarded to the Marine Conservation Society (MCS) for inclusion in the Good Beach Guide 2006.

In 2005, 15 out of the 16 beaches tested¹⁵ passed the EU Bathing Water Directive (76/160/EEC) Imperative Standard (94%), whilst 14 of the 16 passed the more stringent Guide standard.

¹⁵La Haule, Victoria Pool, Havre des Pas, Green Island, Grouville, Archirondel, Bouley Bay, Greve de Lecq, Plemont, St Ouen (Watersplash and Le Braye), Beauport, St Brelade, Portelet, Rozel and Bonne Nuit.

26. Waste Management

Since 1990, the weight of refuse received at Bellozane has increased by about 12%, whilst the quantity of sewage has risen by more 30%.

Table 26.1 Waste Arisings and Treatment at Bellozanne, 1990-2005

	1990	1995	2002	2003	2004	2005
Refuse received (tonnes)	64,569	72,206	78,784	81,386	76,933	72,207
Ash (tonnes)	18,252	18,594	19,681	17,849	16,331	16,595
Hazardous chemicals (tonnes)	3.5	< 6.0	23.4	0*	0*	0*
Animal by-products exported					471	526
Sewage processed						
Sewage (million cubic metres)	7.6	10.6	10.9	10.5	10.9	9.9
% of sewage receiving full treatment	96	93	95	80	98	99.7

* No hazardous chemical shipped until legislation to allow export is enacted.

Waste Recycled or Composted

In 2005, almost 4,000 tonnes of paper and cardboard were exported for recycling. A total of 12,500 tonnes of green waste was received at La Collette in 2005 which was composted for sale as soil improver. The decrease in the amount of mineral oils exported is due to many local growers burning mineral oils to heat glass houses.

Table 26.2 Waste Recycled or Composted, 1995-2005

	1995	2000	2002	2003	2004	2005
Paper and cardboard exported	571	1,004	1,497	1,933	1,988	3,821
Packaging timber				1,400	1,300	1,010
Agricultural and green waste	1,611	22,791	30,000	12,000 ¹	12,250 ¹	12,500 ¹
Agricultural polythene exported		624	754	142	454	104 ³
Aggregates - stone/sand/soil		32,136	33,628	29,899	27,691	24,358
Glass			5,323	5,593	5,470	5,643
Textiles		108	167	185	287	327
Vegetable Oils exported		211	200	192	216	207
Mineral Oils exported		132	160	100	80	6
Mercury/Cadmium batteries exported (kg)	>100	2,500	0 ²	0 ²	0 ²	0 ²
Fragmented metals exported	7,794	11,092	10,650	11,470	9,770	10,029

Units are tonnes except where indicated.

¹Green waste only.

²Batteries are stored until sufficient quantity available for export.

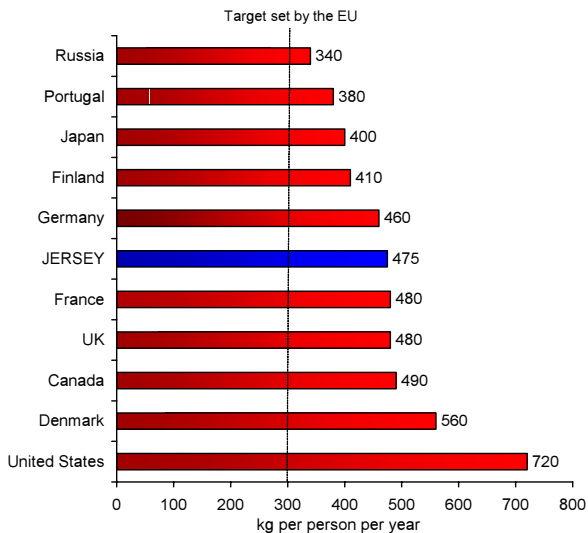
³Polythene now mostly exported by a private company. Figure published represents quantity handled by T&TS.

Source: Transport and Technical Services Department.

Refuse per Person

An evaluation of household waste generation in Jersey (undertaken in 2001 by the Public Services Department) indicated that the average municipal waste for each person was 475 kg per annum. This figure was some 175 kg per annum greater than the target of 300 kg per annum set by the EU.

Figure 26.1 Annual Refuse per Person from Selected Countries, 2001



Source: *The Economist* 2002 and Transport and Technical Services Department.

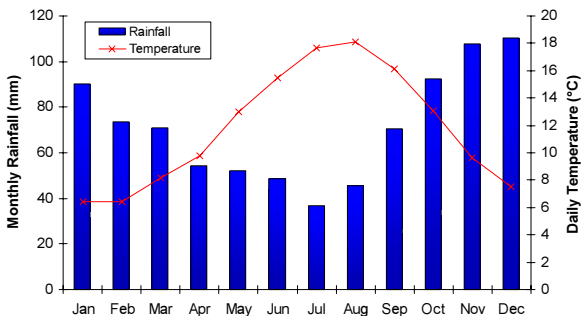
27. Climate

Meteorological data has been recorded at the Maison St. Louis Observatory in St Saviour since 1894. Administered by the Jersey Meteorological Department, based at Jersey Airport, the long and continuous data set from the Maison St. Louis Observatory has made an important contribution to the studies of global warming and the possible impact of climate change on the Channel Islands. Sunshine records are from the official sunshine station at Fort Regent.

Table 27.1 Temperature, Sunshine and Rainfall, Period Averages 1971-2000

	Daily Temperature (°C)	Daily Sunshine (hours)	Monthly Rainfall (mm)
Jan	6.4	2.1	90.4
Feb	6.4	3.1	73.6
Mar	8.2	4.3	70.8
Apr	9.8	6.3	54.4
May	13.0	7.7	52.0
Jun	15.5	8.2	48.6
Jul	17.7	8.3	37.0
Aug	18.1	7.9	45.6
Sep	16.1	6.1	70.3
Oct	13.1	4.0	92.2
Nov	9.6	2.7	107.9
Dec	7.5	1.9	110.5
Monthly Mean	11.8	5.2	Year total: 853.3

Figure 27.2 Temperature and Rainfall, Period Averages 1971-2000



Source: Jersey Meteorological Department.

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Other Useful Websites

Jersey Chamber of Commerce	www.jerseychamber.com
Jersey Evening Post	www.jerseyeveningpost.com
Jersey Finance	www.jerseyfinance.je
Jersey Financial Services Commission	www.jerseyfsc.org
Jersey Legal Information Board	www.jerseylegalinfo.je
States Assembly	www.statesassembly.gov.je
States of Jersey	www.gov.je
Statistics Unit	www.gov.je/statistics
The Société Jersiaise	www.societe-jersiaise.org

For information relating to travel to Jersey contact:

Jersey Tourism	www.jersey.com
Liberation Square	
St Helier	
Jersey JE1 1BB	
Tel: +44 (0) 1534 500700	
Fax: +44 (0) 1534 500808	
E-mail: info@jersey.com	

Reports Published by the States of Jersey Statistics Unit

The following is a list of publications by the Statistics Unit and the respective release dates in 2006. All reports can be viewed or downloaded from the Statistics Unit's website (www.gov.je/statistics) after publication.

Earnings

Average Earnings Index at June 2006 – 30 August

Economy

Survey of Financial Institutions, 2005 – 5 July

GVA and GNI, 2005 – 27 September

Jersey Economic Digest – 13 December

Employment

Labour Market (Public & Private Sectors) at December 2005 – 5 April

Labour Market (Public & Private Sectors) at June 2006 – 4 October

RUDL licences at December 2005 – 1 February

Population

Population update, 2005 – 7 June

Prices

House Price Index, Q4 2005 – 15 February

House Price Index, Q1 2006 – 17 May

House Price Index, Q2 2006 – August 16

House Price Index, Q3 2006 – 15 November

Retail Prices Index, December 2005 – 25 January

Retail Prices Index, March 2006 – 26 April

Retail Prices Index, June 2006 – 19 July

Retail Prices Index, September 2006 – 18 October

UK/Jersey Price Comparisons, June 2006 – 13 September

Other

Jersey in Figures – 15 March

Jersey Annual Social Survey, 2005 – 29 March (*p*)

Jersey Energy Trends – 21 June

Jersey Household Expenditure Survey, 2004/5 – 28 June (*p*)

(*p*) – Indicates provisional.

'Jersey in Figures 2005' presents key statistics relating to Jersey, Channel Isles, in a format that is easy to understand. The booklet is intended to be a convenient reference for government members, public and private institutions, the general public and visitors to the Island.

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