



Jersey in Figures 2013

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Foreword

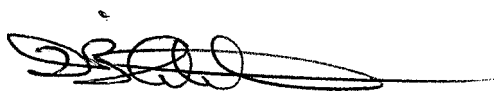
‘Jersey in Figures, 2013’ presents economic, social and environmental information about Jersey. The publication aims to be a convenient reference book for government members, public and private institutions, the general public and visitors to the Island.

‘Jersey in Figures 2013’ 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.

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

The next edition of Jersey in Figures will be published in the Spring of 2015.

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



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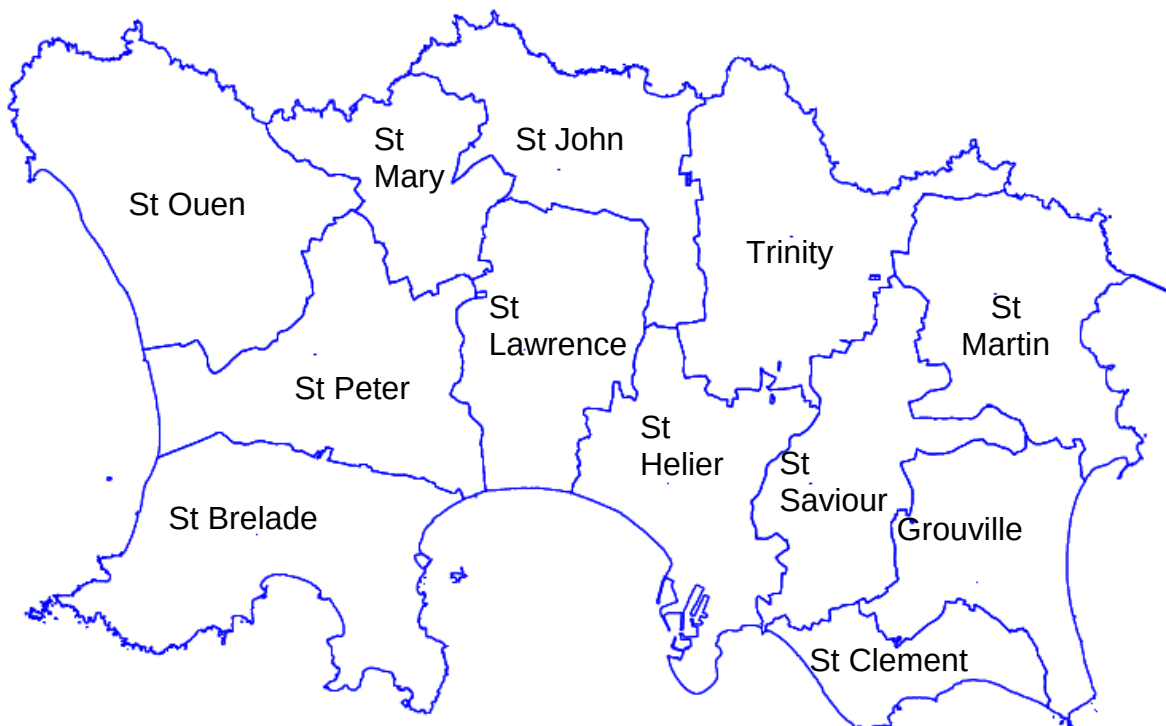
Front cover photographs: Natalie Kemp

An Introduction to Jersey

Jersey is the largest of the Channel Islands with an area of 45 square miles (120 km²) and is situated 14 miles off the north-west coast of France and 85 miles from the south coast of England.

Jersey is a Crown Dependency and as such is not part of the UK. The Island is not represented in the UK parliament, whose Acts only extend to Jersey if expressly agreed by the Island that they should do so.

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



The legislature of the Island is called 'The States of Jersey', members of which are elected by the population, males and females aged 16 or over. The States is comprised of the Bailiff, who is President of the Assembly, the Lieutenant-Governor, 10 Senators, the Connétables of the 12 parishes, 29 Deputies, the Dean of Jersey, the Attorney-General and the Solicitor-General. All members have the right to speak in the States Assembly but only the elected members (the Senators, Connétables and Deputies) have the right to vote; the Bailiff, who is appointed by the Crown, acts as Speaker.

The system of government is comprised of a Council of Ministers and several Scrutiny Panels. There are 51 States members; a maximum of 25 members are in ministerial positions either as Ministers (11 members) or Assistant Ministers (up to 15 members), and up to 30 other members sit on the Scrutiny Panels.

The economy of Jersey saw a great deal of change during the latter part of the 20th century. As trade markets became more international and global travel increased traditional Jersey industries such as agriculture and tourism were superseded by financial services as the dominant industry in Jersey. The Financial services sector (which includes banking, trust and company administration, fund management and administration, accountancy and legal activities) has grown such that it now accounts for around two-fifths of total economic activity in Jersey and employs about a quarter of the workforce.

Key Indicators

Economic Data (2012 figures)	
Gross Value Added (GVA)	£3.6 billion
Gross National Income (GNI)	£4.0 billion
States of Jersey:	
General Funds Income	£628 million
Net Revenue Expenditure	£601 million
Income Tax Returns	£431 million
Prices and Earnings	
All-Items Retail Prices Index (12 months to December 2013)	1.9%
Annual increase in average earnings (12 months to June 2013)	2.2%
Population	
Resident population (27 March 2011, Census Day)	97,857
Estimated population (December 2012)	99,000
Population per square kilometre (2011 Census)	819
<i>Proportion of population (2011 Census):</i>	
• <i>working age (women/men 16-59/64 years)</i>	66%
• <i>below working age</i>	17%
• <i>above working age</i>	18%
Annual number of live births per 1,000 residents (2012)	11.3
Annual number of deaths per 1,000 residents (2012)	7.7

1. Size and Land Cover of Jersey

1. Size and Land Cover of Jersey

Jersey has a total surface area¹ of 119.6 square kilometres (km²) and is divided into 12 parishes, ranging in size from St Clement (4.2 km²) to St Ouen (15.3 km²).

Table 1.1 Area of Jersey by Parish

	km ²	Vergées	Acres	Percent of Island area
St. Ouen	15	8,493	3,773	13
St. Brelade	13	7,338	3,260	11
Trinity	13	6,959	3,091	10
St. Peter	12	6,526	2,899	10
St. Martin	10	5,827	2,589	9
St. Lawrence	10	5,440	2,417	8
St. Helier	10	5,297	2,353	8
St. Saviour	9	5,052	2,245	8
St. John	9	5,077	2,255	8
Grouville	8	4,532	2,013	7
St. Mary	7	3,641	1,618	5
St. Clement	4	2,355	1,046	4
Total	120	66,536	29,559	100

The area of St Helier includes reclaimed land area of 961 Vergées (2 km²).

Note: km² rounded independently to nearest integer

In 2012, around a quarter of the land was built upon, over a half was cultivated and a sixth was natural vegetation.

Table 1.2 Land cover type by Parish, percentages

Percentages	Built Environment	Cultivation	Natural Environment	Misc.	Inland Water	Glass-houses	Total
St. Ouen	15	60	23	2	1	0	100
St. Brelade	29	24	38	9	0	0	100
Trinity	15	63	20	2	0	0	100
St. Peter	22	50	15	11	2	0	100
St. Martin	18	63	17	1	0	1	100
St. Lawrence	21	62	13	2	1	0	100
St. Helier	52	31	9	8	1	0	100
St. Saviour	33	55	7	4	0	1	100
St. John	17	65	15	3	0	0	100
Grouville	21	62	9	5	2	1	100
St. Mary	14	68	14	3	0	1	100
St. Clement	37	48	4	9	0	2	100
All	24	54	17	5	1	<1	100

"Built environment" includes man-made surfaces such as buildings, roads, footpaths, swimming pools, gardens, harbour areas etc. "Natural Vegetation" includes woodlands, dunes, grassland, cliffs and shrub. "Miscellaneous" includes parks, golf courses, cemeteries, quarries and sports fields. "Glasshouses" only includes glasshouses and polytunnels over 200m². "Inland Water" includes ponds, reservoirs.

¹ Including reclaimed land of St Helier.

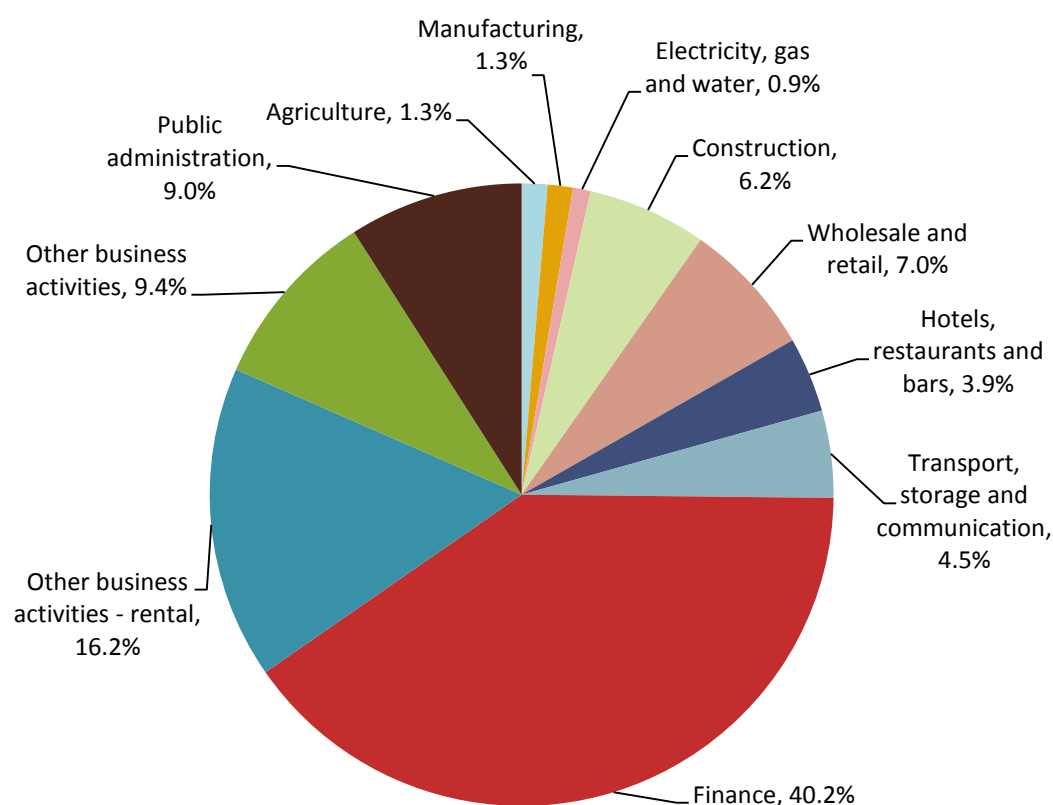
2. National Accounts

The concept of Gross Value Added (GVA) provides an appropriate measure of economic activity in Jersey. In essence, GVA is the sum of profits of businesses and earnings of employees. In 2012, total GVA (at basic prices) for Jersey was £3.6 billion.

Economic activity can also be considered in terms of the total income of resident businesses and individuals. This aggregate measure, known as Gross National Income (GNI), is derived from total GVA by subtracting income earned in Jersey by non-Jersey owned businesses and adding income earned overseas by Jersey businesses and resident individuals. In 2012, Jersey's GNI was £4.0 billion.

The GVA for each sector of Jersey's economy is shown in Figure 2.1. Financial services accounted for about two-fifths (40%) of total GVA in 2012.

Figure 2.1: Gross Value Added by sector², 2012



Historically, there has been a strong relationship between the finance industry and the overall Jersey economy (See Figure 2.2). The overall real term growth recorded up to 2000 was driven by the Finance sector. The subsequent periods of decline, growth and decline have resulted from the behaviour of the GVA of the Finance sector coupled with essentially stable real term GVA for the non-finance sectors of the economy.

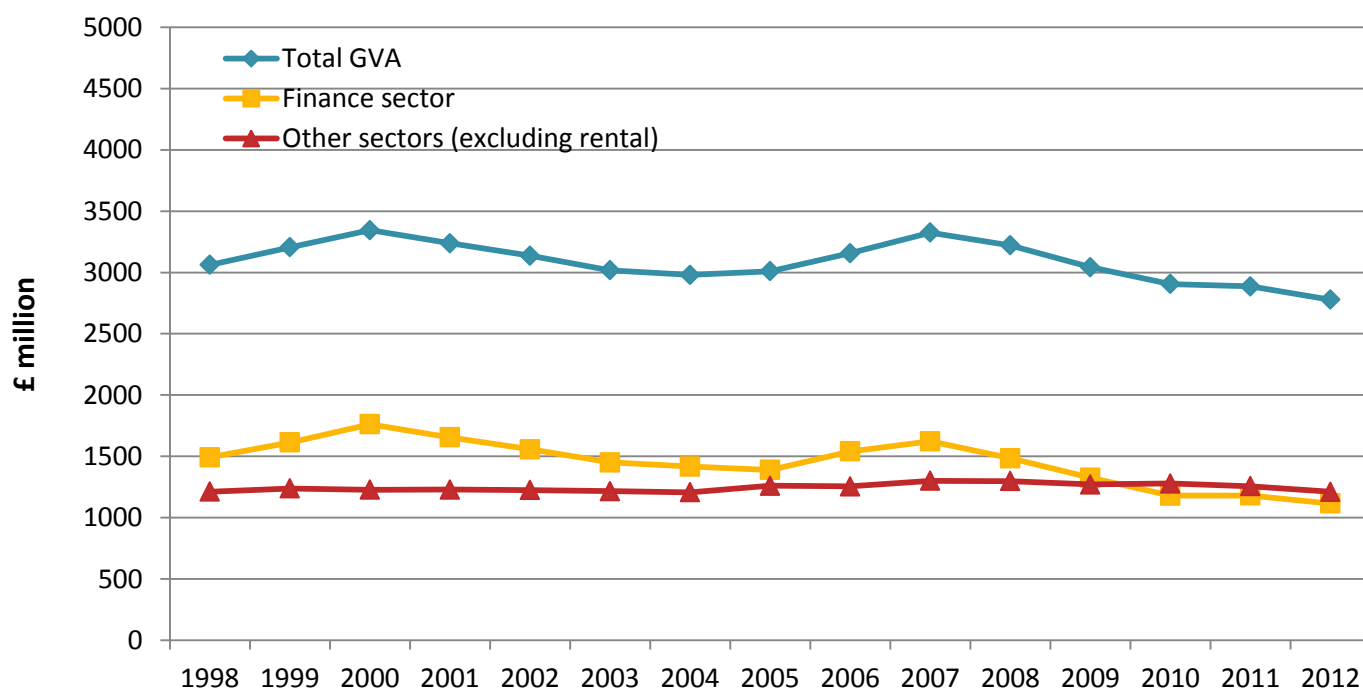
² The 'Other business activities' sector is made up of a range of services (principally businesses servicing households or other businesses) and includes rental income of private households, both actual and imputed.

Table 2.1: GVA (basic) by sector at current year values: £ million

Sector	2004	2005	2006	2007	2008	2009	2010	2011(r)	2012(p)
Agriculture	44	47	50	53	57	62	55	48	48
Manufacturing	59	56	55	53	55	52	53	51	47
Electricity, gas & water	34	37	36	36	41	37	39	39	33
Construction	161	177	192	212	219	225	239	236	223
Wholesale & retail	215	228	239	256	249	253	256	270	254
Hotels, restaurants & bars	113	112	116	123	126	120	126	133	141
Transport, storage & communications	138	146	150	159	158	162	162	163	164
Financial Services	1,464	1,470	1,673	1,808	1,716	1,581	1,443	1,493	1,453
Other business activities	617	666	662	732	809	835	867	895	927
<i>...of which business activity</i>	<i>247</i>	<i>284</i>	<i>267</i>	<i>283</i>	<i>301</i>	<i>302</i>	<i>318</i>	<i>328</i>	<i>339</i>
<i>...of which rental income</i>	<i>370</i>	<i>382</i>	<i>394</i>	<i>449</i>	<i>508</i>	<i>533</i>	<i>549</i>	<i>568</i>	<i>588</i>
Public administration	235	244	257	276	294	304	316	321	327
Total GVA	3,080	3,183	3,430	3,708	3,725	3,629	3,555	3,650	3,617

Further reading: *Measuring Jersey's Economy: Gross Value Added (GVA) 2012: Statistics Unit, September 2013.*

Jersey Economic Trends 2013. (r) = revised, (p) = provisional

Figure 2.2: Gross Value Added (basic) in real terms, 2003 prices

In real terms, total GVA in 2012 was the lowest recorded since at least 1998.

Figure 2.2 shows that the GVA of the Finance sector was surpassed by that of the combined non-finance sectors in 2012 for the third consecutive year. In 2012 total GVA decreased by 4% in real terms, the fifth consecutive year that the Island's economy has declined by this measure (see Figure 2.3).

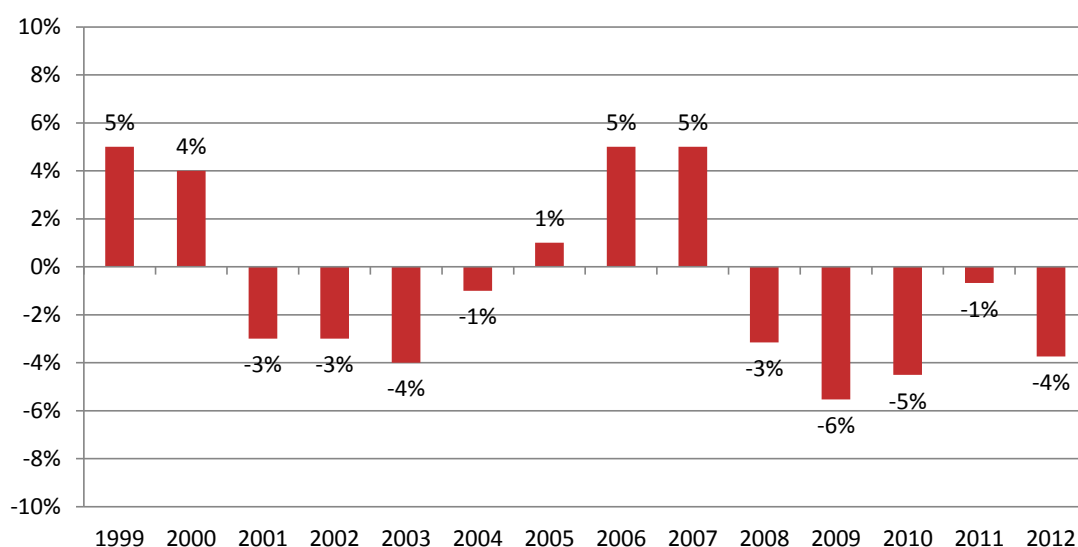
Figure 2.3: Annual percentage change of GVA (basic) in real terms

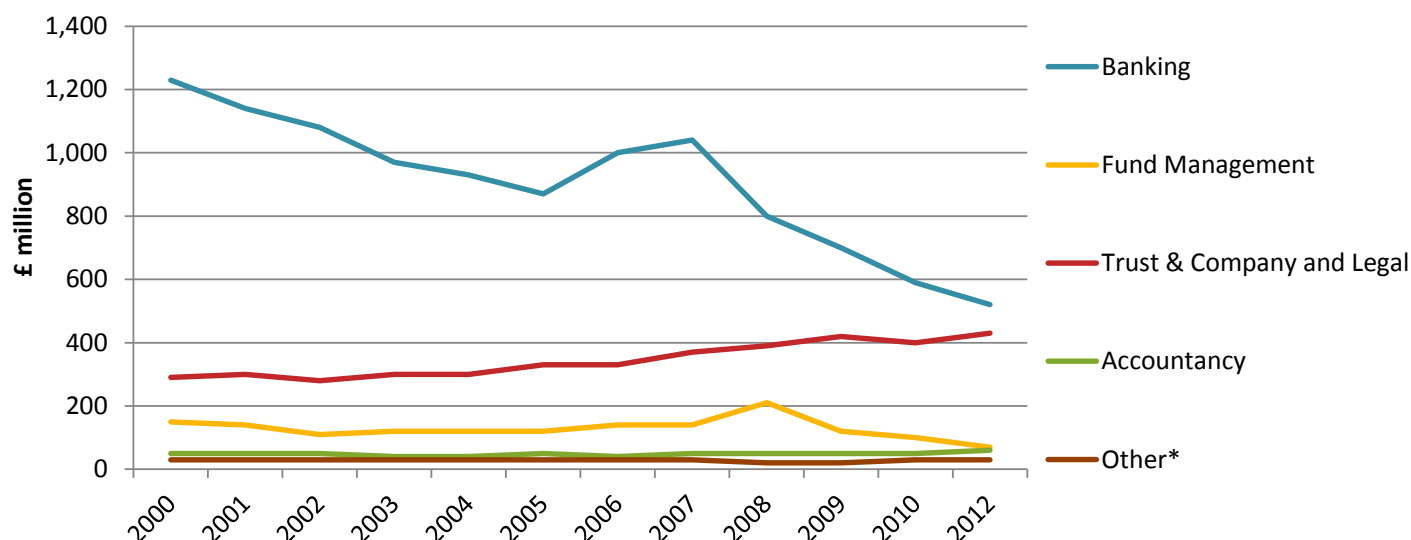
Table 2.2: GVA by sector, constant (2003) values, £ million

Sector	2004	2005	2006	2007	2008	2009	2010	2011 (r)	2012 (p)	Percentage Change 11/12
Agriculture	43	44	46	47	50	52	45	38	37	-3%
Manufacturing	57	53	50	47	48	43	44	40	36	-9%
Electricity, gas & water	33	35	33	33	35	31	32	31	25	-18%
Construction	156	168	177	190	190	188	195	186	171	-8%
Wholesale & retail	209	216	220	229	215	212	209	214	195	-9%
Hotels, restaurants & bars	109	106	107	110	109	100	103	105	108	3%
Transport, storage & communications	133	138	138	143	137	136	132	129	126	-3%
Finance	1,417	1,389	1,540	1,622	1,484	1,325	1,179	1,181	1,116	-5%
Other Business Activity	597	630	609	657	699	700	708	708	712	1%
...of which business activity	239	269	246	254	260	253	260	259	261	1%
...of which rental income	358	361	363	403	439	447	449	449	451	1%
Public administration	227	230	237	247	255	255	258	254	251	-1%
Total GVA	2,980	3,010	3,157	3,325	3,220	3,042	2,905	2,886	2,778	-4%

2. National Accounts

As can be seen in Figure 2.4, the reduction in GVA of the Finance sector, observed in recent years, can largely be attributed to the Banking sub-sector. In 2012 GVA in real terms for this sub-sector was less than half of that recorded in 2000 (corresponding to a fall of 58% in the last twelve years). In the latest year (2012) GVA of the Banking sub-sector fell by more than a tenth (12%) compared to in 2011.

Figure 2.4 GVA by Finance sub-sector in constant (2003) year values 2000-2012



* Other includes insurance companies and financial advisors

Further reading: Jersey Economic Trends 2013

In 2012, GVA, in real terms, of the Fund Management sub-sector measured a third of that recorded in 2008. There has been some volatility in this sub-sector over the last twelve years, with strong growth recorded from 2002 to 2008 followed by a period of decline from 2008 to 2012.

In contrast, the Accountancy and combined Trust & Company and Legal sub-sectors have seen GVA in real terms remain relatively stable over the last twelve years. In the most recent year, these sub-sectors recorded the highest levels of GVA (in constant year values) since at least 1998.

Gross Value Added per capita

Expressing national accounting aggregates on a per capita basis (that is, per head of population) is an indicator of the economic standard of living of the resident population. For Jersey, the appropriate measure is GVA per capita.

The estimated resident population of Jersey at year-end 2012 was 99,000³. The Island's GVA per capita in 2012 was £36,700 (in current year values).

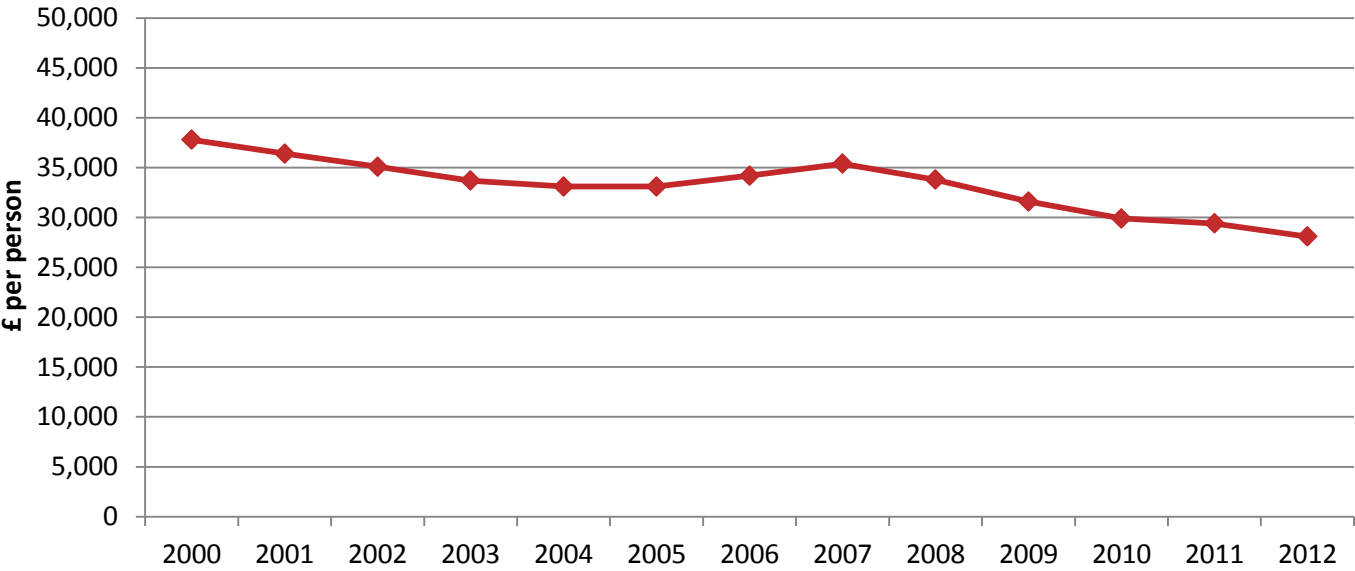
During the last five years, the resident population of the Island has increased by 5%, from 94,000 persons at the beginning of 2008 to 99,000 persons at the end of 2012. Over this period (2008-2012), total GVA decreased by a sixth (16%) in real terms.

³ Jersey Resident Population 2012; States of Jersey Statistics Unit, June 2013.

2. National Accounts

As a result of the increase in the resident population and the real term decrease in GVA, Jersey's real term GVA per capita decreased by a fifth (21%) over the period 2008 to 2012 inclusive. Figure 2.5 shows the real term GVA per capita.

Figure 2.5 GVA per capita (in real terms) 2000-2012; (2003 values)

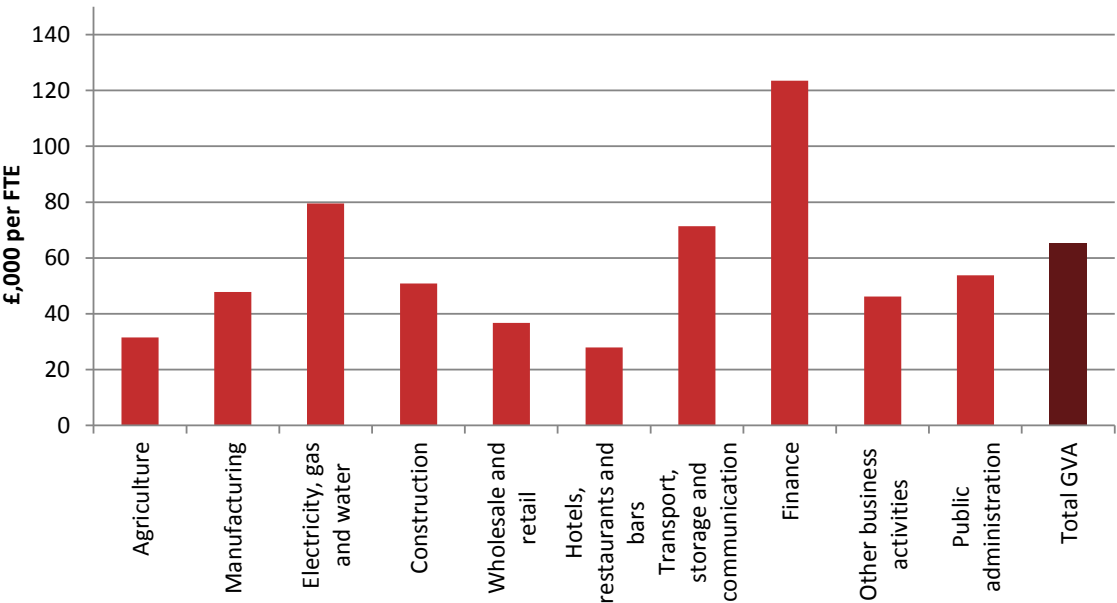


Further reading: Jersey Economic Trends 2013

Gross Value Added per employee

Another way of assessing the contribution each sector makes to the overall economy is to look at GVA per employee. This is derived by dividing GVA by the number of full-time equivalent⁴ (FTE) employees. GVA per employee is a measure of productivity showing the value of economic output produced per employee.

Figure 2.6 GVA per full-time equivalent employee in 2012 (current values)



⁴ The number of full-time equivalent employees is calculated by assigning a full-time employee a weight of 1 and a part-time employee a weight of 0.5.

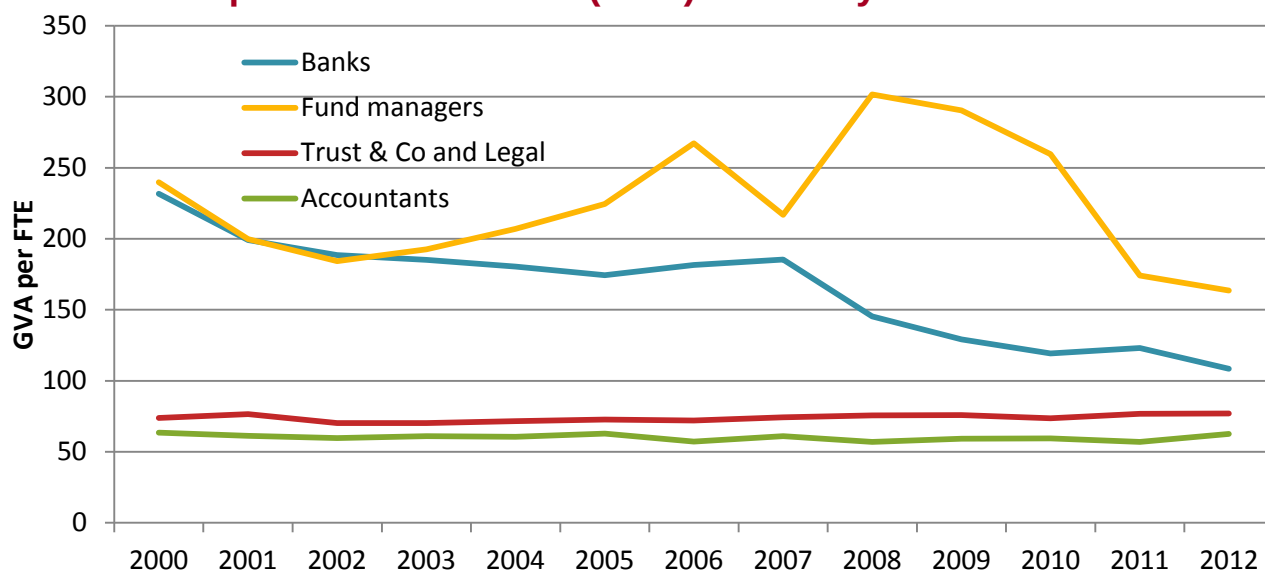
Averaged over all sectors (excluding the rental component of Other business activities), GVA per employee in 2012 in current year values was £61,000 per FTE.

The mean GVA per FTE for the Finance sector was almost three times that of all other sectors; £120,000 per FTE for Finance compared with £42,000 for the other sectors.

The lowest values of GVA per employee were seen in the Hotels, restaurants and bars (£28,000 per FTE), Agriculture (£29,000 per FTE) and Wholesale and retail (£34,000 per FTE) sectors.

The Finance sector saw a decrease of 4% in real term GVA per FTE in 2012. Over the twelve year period from 2000 to 2012 GVA per FTE in Finance has fallen by more than two-fifths (42%) in real terms (see Figure 2.7).

Figure 2.7 GVA per FTE in constant (2003) values by Finance sub-sector



Further reading: Jersey Economic Trends 2013

The GVA per FTE of the Fund Management sub-sector has declined by almost half (46%) since 2008. There has been some volatility in this sub-sector over the last twelve years, with strong growth recorded from 2002 to 2008 followed by a period of decline from 2008 to 2012.

In contrast, the Accountancy, Trust & Company and Legal sub-sectors have seen GVA per FTE remain relatively stable.

3. Financial Services

Bank deposits and fund administration in Jersey

Total bank deposits held in Jersey were more than £200 billion in 2007, since when a decrease of over £70 billion has been recorded. The number of bank licences in both 2012 and 2013 was 42.

Table 3.1 Bank Deposits in Jersey, 2003-2013

	Number of Banks	Deposits (£ billion)		
		Sterling	Currency	Total
2003	55	47.5	108.3	155.8
2004	55	50.7	108.5	159.2
2005	49	55.2	124.5	179.7
2006	45	59.3	128.3	187.6
2007	48	69.6	145.9	219.5
2008	47	69.4	127.6	197.0
2009	47	57.4	113.2	170.6
2010	45	57.1	110.1	167.2
2011	39	55.9	111.4	167.3
2012	42	56.1	92.6	148.7
2013	42	53.0	92.3	145.2

Figures as at 30th September each year. Source: www.jerseyfsc.org

The total value of collective funds administered from Jersey grew by around £145 billion between 2002 and 2008 reaching almost £240 billion. This total then decreased by £77 billion in 2009 but has since increased to almost £195 billion by 2013.

Table 3.2 Total Value and Number of Funds Administered from Jersey, 2003-2013

	Number of Funds	Total No. of Separate Pools	Total Value £ billion
2003	480	1,921	108.2
2004	769	2,208	96.9
2005	906	2,358	122.0
2006	1,086	2,678	169.8
2007	1,249	2,817	221.0
2008	1,452	3,080	239.9
2009	1,287	2,822	163.0
2010	1,327	2,625	178.9
2011	1,365	2,457	193.7
2012	1,392	2,362	189.5
2013	1,348	2,205	194.8

Figures as at 30 September each year. Source: www.jerseyfsc.org

The number of funds administered from Jersey has almost tripled over the last decade.

Investment Business

The number of clients in September 2013 was slightly (0.5%) greater than a year earlier; whilst the total assets and average asset value per client were each up by around 4%.

Table 3.3 Value of Funds Managed and Number of Clients, Sept 2010-2013

	2010	2011	2012	2013	% change
Clients	14,750	14,968	14,377	14,453	0.5
Assets (£ billion)	20.6	20.8	20.9	21.8	4.3
Average asset value per client (£ million)	1.40	1.39	1.45	1.51	4.1

Source: Jersey Financial Services Commission; www.jerseyfsc.org

Jersey is becoming a key jurisdiction for corporate listings; on 30th September 2013 there were 33,272 live companies on the register.

Survey of Financial Institutions

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

Table 3.4 shows the estimated total gross operating surplus (GOS) for Jersey's finance sector for the last four years, 2009 to 2012, and mean GOS per full-time equivalent (FTE) employee.

Table 3.4 Total GOS and average GOS per FTE employee 2009-2012

	2009	2010	2011	2012
Total GOS (£ million)	870	720	730	720
Mean GOS per FTE employee (£ k)	70	61	62	61

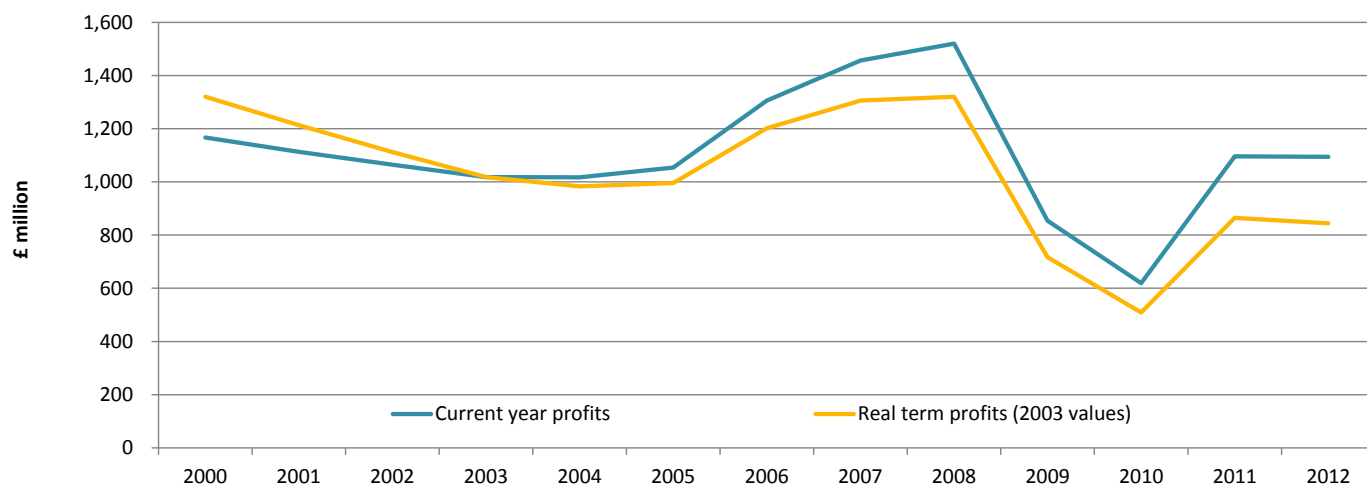
In 2012, total GOS was estimated at £720 million, representing a marginal decrease (of around 1%) compared with 2011, returning essentially to the same level as that recorded in 2010.

Mean GOS per FTE across the Finance sector also decreased marginally in 2012, reflecting the decrease observed in total GOS in that year.

Figure 3.1 shows that the total net profit (on which Jersey tax is levied) of Jersey's financial services sector in 2012 was estimated at £1,090 million. This latest estimate of annual net profit is at a similar level to that recorded in 2011, and about three-quarters higher than in 2010. It should be noted that the substantial increase in total net profit observed since 2010 can be attributed to a small number of companies reporting large transfers of income from non-resident units to resident parent companies based in Jersey in each of the latest two years.

3. Financial Services

Figure 3.1 Estimated Total Profit for the Financial Services Sector, 2000-2012



In 2012 the estimated net profit of the Banking sub-sector was £850 million (current year values), an increase of 1% compared with the previous year. Net profit for the Banking sub-sector had fallen for three successive years from 2008 to 2010; during this period the net profit reported by this sub-sector fell by two-thirds (67%). This period of decline was followed by a large increase in 2011, when net profit was more than double that of 2010 (*driven by the factors indicated previously*).

In 2012 the Fund management sub-sector recorded a decrease in net profit of almost two-fifths (39%) on an annual basis, representing the fourth consecutive year of decline. Since a peak in 2008, when the net profit of Fund management was estimated at £180 million, the net profit for this sub-sector has decreased by more than four-fifths. In 2012, the net profit of the Fund management sub-sector was estimated at £25 million.

In 2012 the net profit of the Trust & company administration sub-sector increased by 6% on an annual basis, to £120 million; this latest growth follows an annual increase of more than a quarter in 2011.

In contrast, the Legal sub-sector saw a decline in net profit of around 9% in 2012. This latest annual decline follows increases in net profits recorded in both 2010 and 2011. Since 2009, when it was first possible to analyse this sub-sector separately, the net profit of the Legal sub-sector has increased by a third (33%).

The net profit for Accountancy in 2012 was estimated at £27 million, representing the highest level for this sub-sector since at least 1998.

In 2012, the mean net profit per full-time equivalent (FTE)⁵ employee across the Finance sector was £93,000, a similar level to that recorded in 2011. Net profit per FTE employee in each of the latest two years has been slightly lower than that recorded between 2000 and 2005. The mean net profit per employee for each of the sub-sectors ranged from £176,000 per FTE in Banking to £29,000 per FTE in Accountancy.

⁵ 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.

3. Financial Services

In 2012, total expenditure by Jersey finance companies on goods and services was £750 million, representing a decrease of 1% compared with 2011. Of the total expenditure on goods and services, more than half (55%) was spent in Jersey. The Banking sub-sector accounted for almost three-fifths of this on-Island expenditure whilst Trust & company administration accounted for more than a quarter.

Table 3.5 Net Profit and Employment of Financial Institutions, 2004-2012
(current year values)

		2004	2005	2006	2007	2008	2009	2010	2011	2012
Total Net Profit	£M	1,020	1,050	1,310	1,460	1,520	850	620	1,100	1,100
Banks		820	843	1,060	1,200	1,160	594	392	841	851
Fund managers		77	80	108	98	182	59	57	41	25
Trust & co. admin & Legal		103	112	122	142	159	185	150	186	195
Accountants		17	20	18	21	24	23	23	22	27
Total Manpower(FTE)		11,050	11,210	11,800	12,480	12,800	12,670	12,110	12,090	12,080
Banks		5,150	4,980	5,490	5,590	5,540	5,450	4,960	4,850	4,820
Fund managers		570	530	540	630	690	410	390	460	450
Trust & co. admin & Legal		4,180	4,510	4,540	5,020	5,200	5,590	5,520	5,580	5,620
Accountants		720	740	780	800	920	910	910	900	910
Average Net Profit per FTE employee	£k	96	98	115	121	123	69	53	93	93
Total Expenditure on employment	£M	460	500	570	650	700	640	690	730	700
Average employment cost per FTE	£k	43	47	50	54	56	52	59	62	60

All numbers have been rounded independently.

Further reading: Survey of Financial Institutions, 2012, published annually by the Statistics Unit; Jersey Financial Services Commission www.jerseyfsc.org

4. Tourism

Number of Staying Visitors and Day Trippers

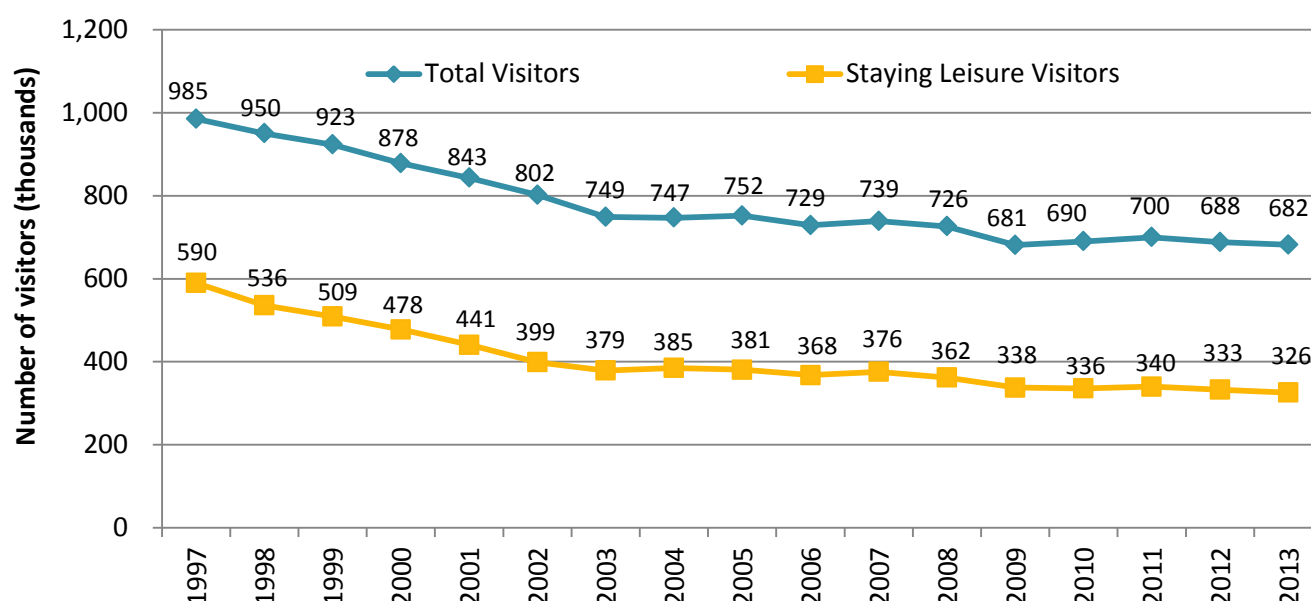
Between 2012 and 2013, the total number of staying leisure visitors decreased by 2% to 325,800, whilst the number of leisure day visits increased marginally (0.1%) to 101,300.

Total on-Island visitor expenditure in 2013 was £228 million, an average of £334 per visitor (all categories).

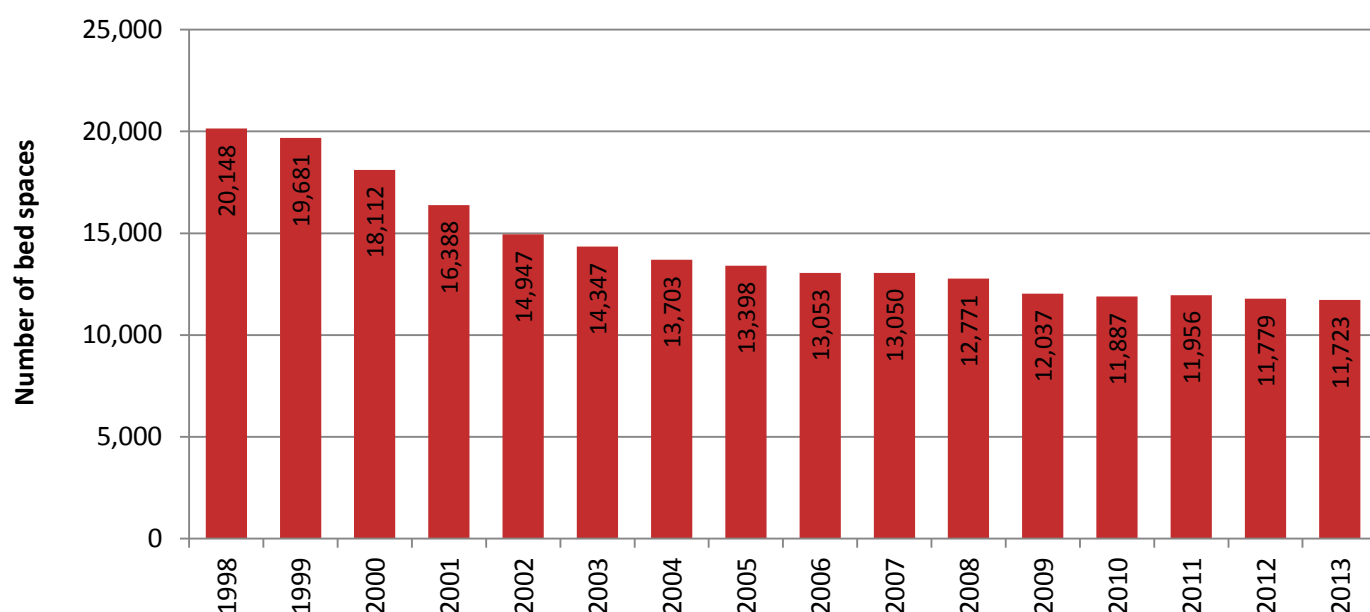
Table 4.1 Visitor Expenditure, Volume and Occupancy Rates, 2013

On-Island visitor expenditure	£228 million
Number of visitors	
Total tourism	681,900
Staying leisure	325,800
Business	112,700
Staying conference	6,000
Leisure day visits	101,300
Visiting yachtsmen	19,900
Registered accommodation establishments	141
Registered tourism bed spaces	11,700
Total bed nights available over year	3.4 million
Total bed nights sold over year	1.7 million
Total room nights sold over year	0.9 million
Average yearly room space occupancy	60%
Average yearly bed space occupancy	50%

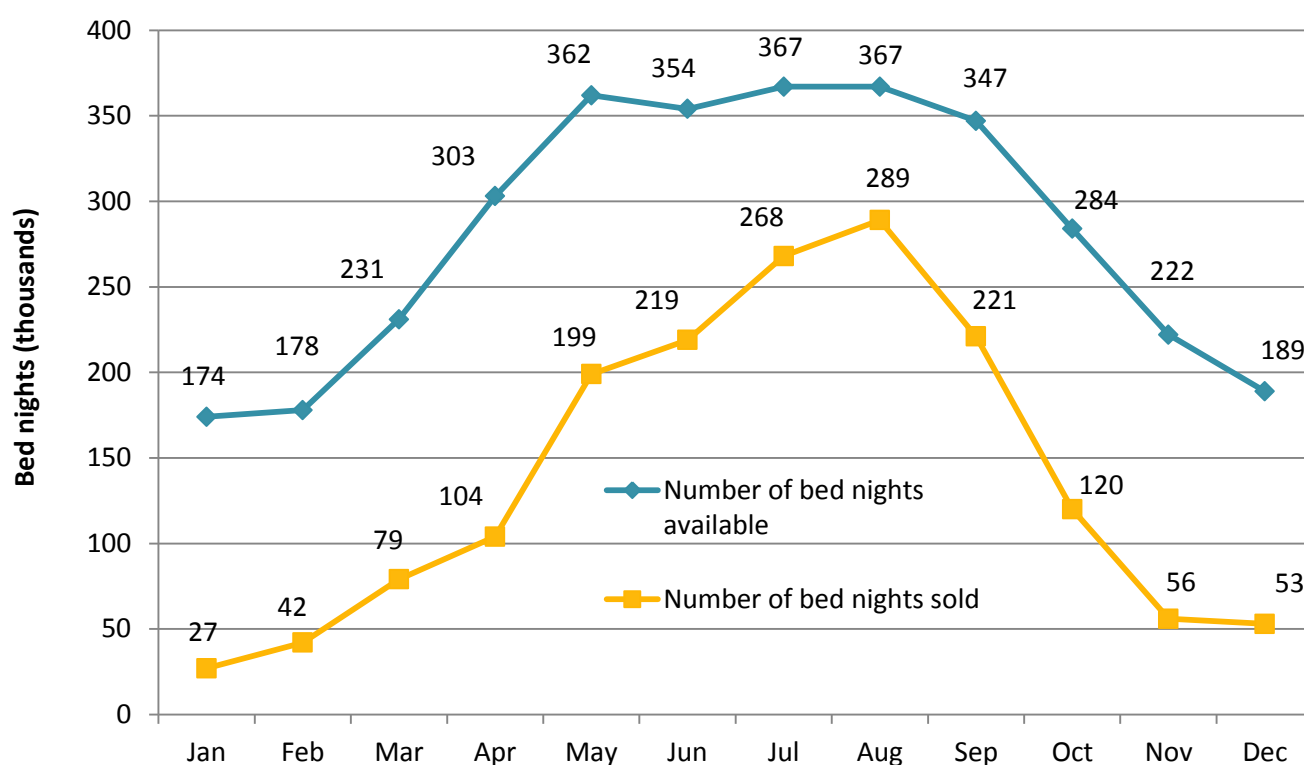
Figure 4.1 Number of Staying Leisure and Total Visitors, 1997-2013



The number of registered bed spaces has fallen by more than two-fifths (42%) since 1998.

Figure 4.2 Number of Registered Bed Spaces, 1998-2013

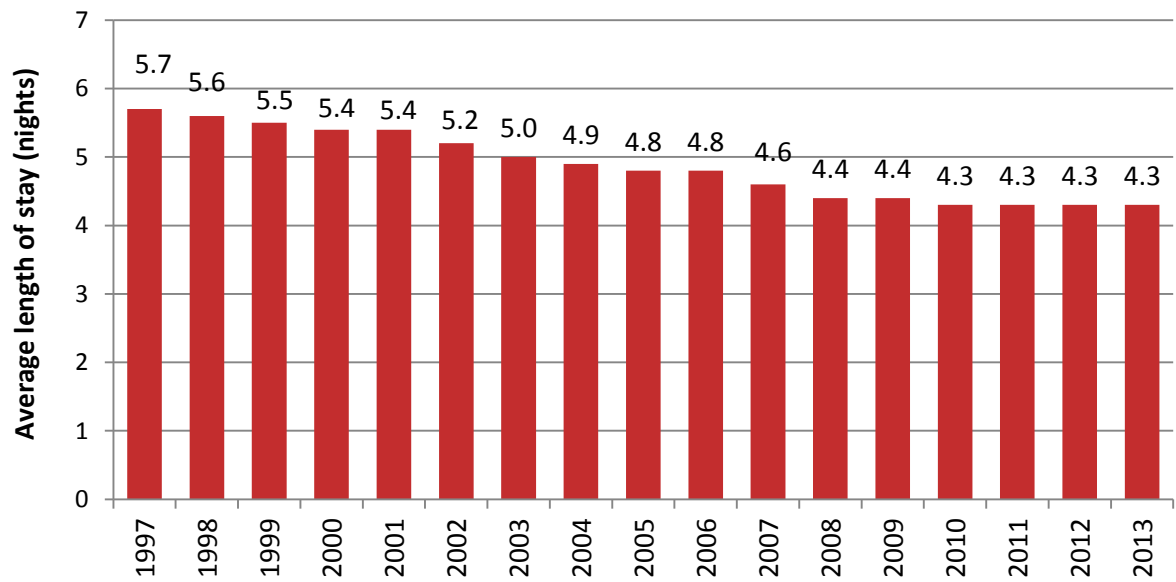
The average yearly room occupancy rate for 2013 was 60%, whilst the bed occupancy rate was 50%. Reflecting the seasonality of tourism in Jersey, the lowest occupancy rates occurred between January to March and November to December.

Figure 4.3 Number of Bed Nights Available and Number Sold, 2013

Length of Stay of Staying Leisure Visitors

Between 1997 and 2013 the average number of nights spent in Jersey by leisure visitors has decreased by more than 1 night, from 5.7 to 4.3.

Figure 4.4 Average Length of Stay of Staying Leisure Visitors, 1997-2013

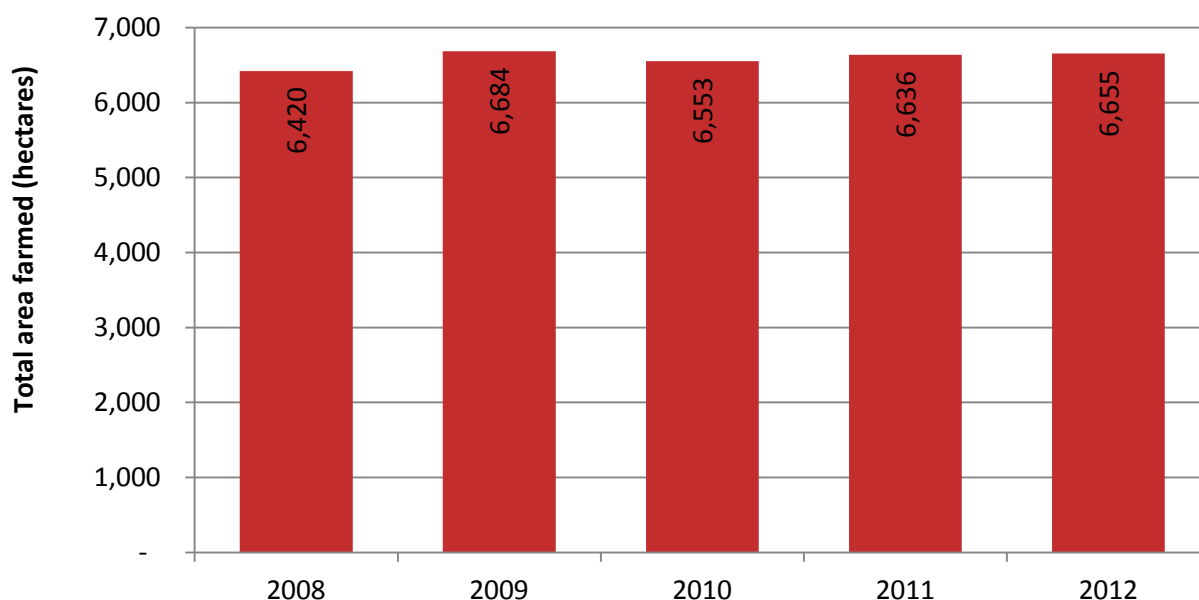


Further reading: Jersey Tourism Annual Report 2013
Please visit www.jersey.com/statistics

5. Agriculture and Fisheries

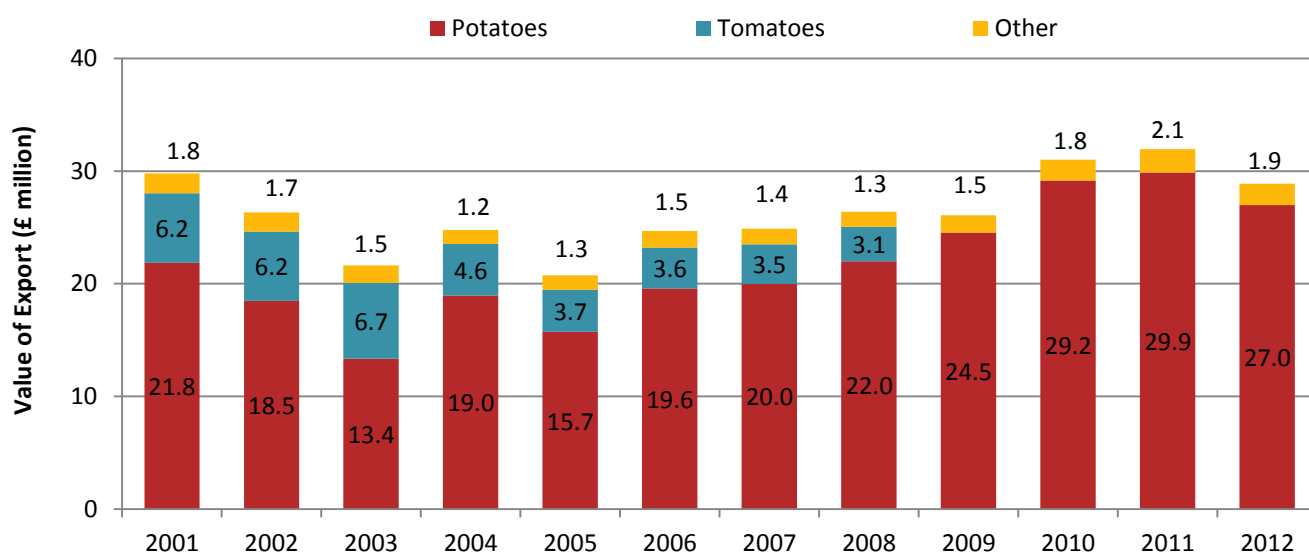
In 2012, agricultural land occupied 57% of the Island's area, an increase of 24 hectares (135 vergées) since 2011.

Figure 5.1 Total area farmed, 2008-2012 (hectares)



The main crop grown in Jersey, in terms of monetary value, is potatoes with a value of £27 million in 2012, a decrease of 12% on the previous year. Exports were down 2,302 tonnes to a total of 28,588 tonnes in 2012.

Figure 5.2 Value of Export Arable Crops, 2001-2012 (£ million in 2012 prices)



Note: Data on tomatoes not available for 2009 onwards

Dairy Industry

In 2012, the total number of cattle increased by 0.3% compared with the previous year to 5,150 animals. The number of cows and heifers in milk saw a reversal of the recent decline with an increase to 2,931, up 1% from 2,890 in 2011. There has still been an overall reduction of 18% since 2007 (see Table 5.1).

5. Agriculture and Fisheries

Milk production on dairy farms supplying the Jersey Dairy was 12.6 million litres for the milk year ending 31st March 2013, a fall of 100,000 litres (1%) compared to the milk year ending 31st March 2012.

The gross sales value of milk delivered to Jersey Dairy increased from £11.6 million (91.5 pence per litre, ppl) to £11.9 million (95.0 ppl) over the twelve months to 31st March 2013, a rise in total value of 3% and in sales value per litre of 4%.

Table 5.1 Milk production and value (2008-2012)

	2008	2009	2010	2011	2012
Dairy herds	30	28	28	27	25
Milking cows	3050	2979	2970	2890	2931
Total cattle	5092	5093	5204	5139	5152
Milk produced (million litres)	11.8	12.6	12.9	12.7	12.6
Value of milk & milk products (£ million)	10.5	10.7	11.1	11.6	11.9

The increase in the value of milk and milk products sold annually by Jersey Dairy results from the continuing development of a value added export market. Products are currently exported to Spain, India, Japan and Hong Kong.

Table 5.2 Total Number of Livestock in Jersey, 2008-2012

Livestock	2008	2009	2010	2011	2012
Cows and heifers	5,090	5,090	5,200	5,140	5,150
Pigs	620	620	430	430	450
Poultry	25,740	20,560	22,030	22,270	27,310
Sheep	700	860	950	970	1,070
Goats	20	20	20	10	20
Equines	770	800	880	850	800
Totals	32,950	27,950	29,510	29,670	34,800

Numbers independently rounded to nearest 10

Egg production from laying hens is the largest poultry activity in Jersey and saw an increase of more than a third (35%) in the number of laying hens in 2012 from 18,800 in 2011 to 25,400 in 2012.

The number of sheep in Jersey has increased in recent years from 550 in 2007 to 1,070 in 2012, almost doubling in number over this period and 10% up on 2011.

Source: Environmental Management and Rural Economy (EMRE)

Further Reading: Agricultural Statistics, 2012

Table 5.3 Fish and aquaculture annual yield

	Annual yield (tonnes)					
	2007	2008	2009	2010	2011	2012
Captured fisheries						
Brown crab	412	481	361	409	434	474
Crawfish	0.2	0.1	0.1	0	0	0
Lobster	155	163	177	225	257	237
Scallop (dredging and diving) ¹	372	331	363	401	285	284
Spider crab	106	179	177	173	144	108
Whelk	545	298	104	497	244	218
Other ²	2	2	2	5	6	7
Shellfish sub-total	1,592	1,453	1,181	1,711	1,371	1,328
Skate/Ray ³	50	80	23	37	35	35
Bass	18	19	12	14	16	11
Sole	2	2	1	1	2	1
Sea Bream	3	4	3	10	18	86
Mullet (grey and red)	1	2	1	3	3	2
Pollack	3	7	8	7	17	9
Mackerel (incl. horse mackerel)	6	7	7	6	6	7
Dogfish (lesser and greater)	8	10	5	13	13	16
Conger	17	7	3	3	3	2
Other ⁴	10	12	10	12	15	16
Wet fish sub-total	118	150	72	107	126	184
Aquaculture						
Pacific oyster	737	830	903	629	972	761
King scallop	4	9	3	2	2	5
Mussel	50	117	101	201	89	103
Aquaculture sub-total	791	956	1,007	833	1,064	868
Total Production	2,501	2,549	2,261	2,653	2,561	2,380

1 2007 onwards includes dredged and commercial dived. 2010 contained 1,020 kg of Queen Scallops for the first time.

2 Includes amande, cuttlefish, prawns, praire, squid and velvet Crab. Includes ormers in 2012.

3 Blonde, small-eyed and thornback only for 2012.

4 Other species included angler, brill, cod, flounder, gunard/latchet, herring, John Dory, lemon sole, ling, plaice, pouting, sand sole, sandeel, shark, smooth hound, snipe, tope, turbot, trigger fish, whiting and wrasse.

Source: Environment Department

Further reading: Marine Resources Annual Status Report 2012

6. Employment

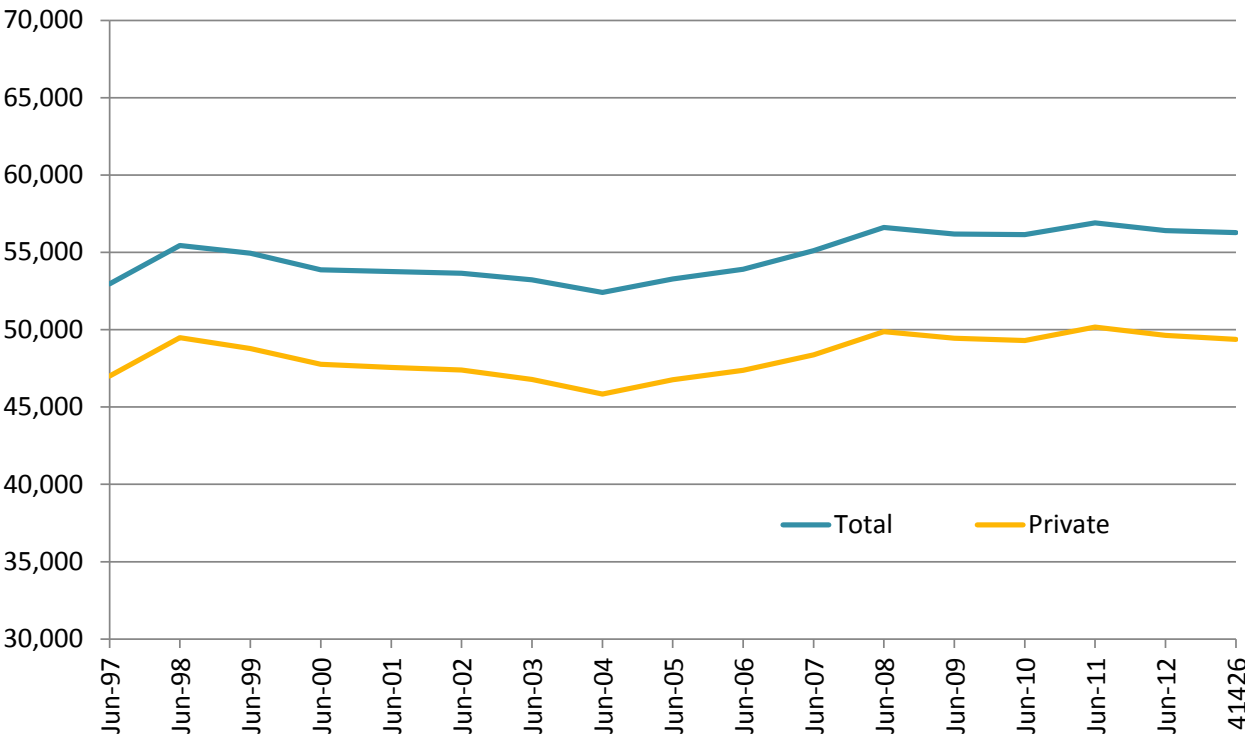
The Jersey Labour Market

In June 2013, a total of 56,290 people were employed in Jersey. This employment total represents a decrease of 110 on June 2012 and is more than 600 less than in June 2011, when employment was at the highest level recorded for at least 15 years.

The total and private sector headcount in June of each year from 1998 to 2013 is shown in Figure 6.1. The latest annual fall in total employment was driven by the private sector which recorded a decrease of 270 staff. In June 2013 the headcount in the private sector (including States Trading Committees⁶ and single-person enterprises) was 49,360.

In contrast, the public sector⁷ recorded an increase of 150 employees on an annual basis; the public sector headcount in June 2013 was 6,920.

Figure 6.1 Total and private sector headcount: June of each year, 1997-2013

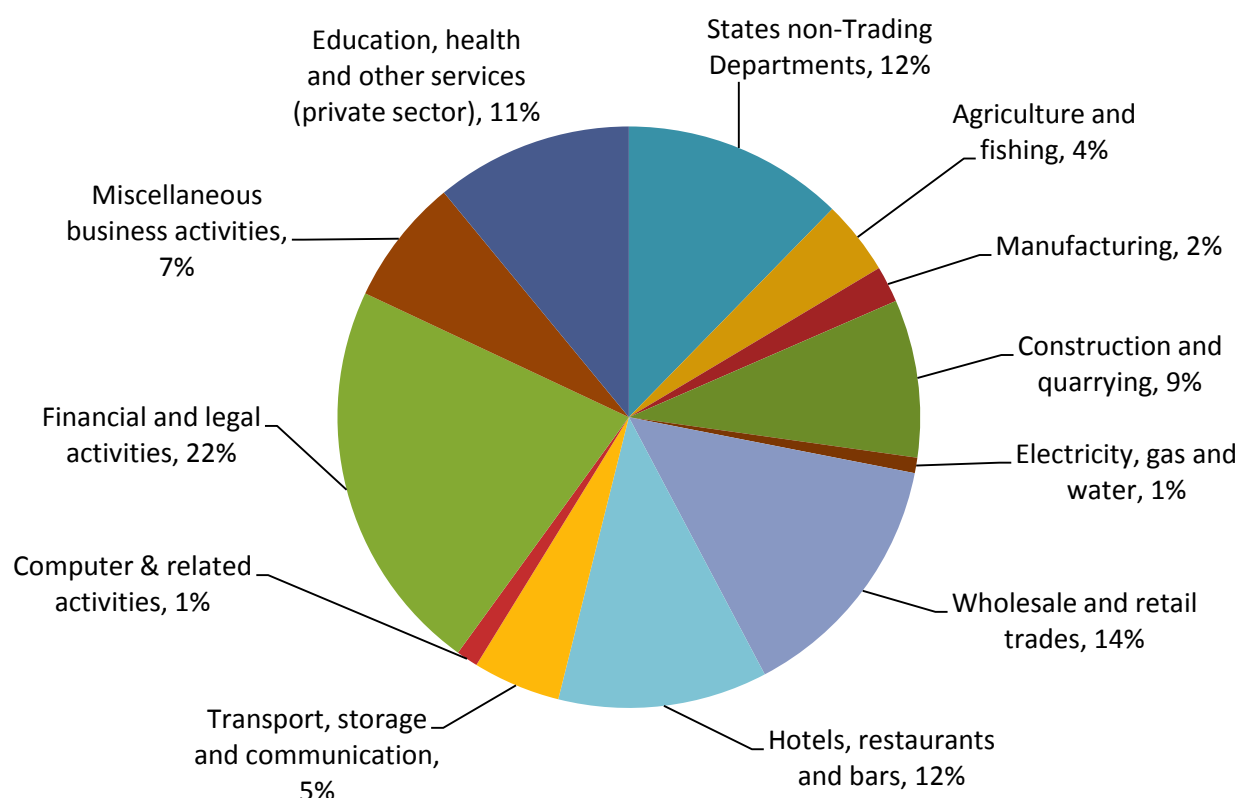


Employment by Sector

In June 2013, over a fifth (22%) of all employees were employed in the Finance sector (12,400). The next largest sector in terms of employment was Wholesale and retail trades (14%, 7,990 posts). Hotels, restaurants and bars (6,540) and the Public Sector (excluding States Trading Committees) each accounted for about one in eight (12%) of Jersey’s labour force.

⁶ Jersey Airport, Jersey Harbours, Jersey Post and Jersey Telecom (JT Global).

⁷ The figure for public sector employment does not include non-states employees, interims, consultants, or employees on zero-hours contracts

Figure 6.2 Sectoral Breakdown of Employment (headcount), June 2013

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

In June 2013, there were over 7,040 private sector firms in Jersey. Of these around four-fifths (81%) employed 5 or fewer people. The greatest proportions of small businesses were in the other business activities sector (90%) followed by construction (85%). The finance and hotels, restaurants and bars sectors had the lowest proportion of small businesses (62%). The finance sector had the greatest proportion of larger businesses (employing more than 20 people) at 20%.

Table 6.1 Number of Firms & Employees by Sector (Private sector only)

<i>As at 30th Jun 2013 Figures rounded to nearest 10</i>	Number of companies by size of workforce				Total Number of employees
Sector	1 – 5	6 - 20	21+	Total	
Agriculture and fishing	280	60	20	360	2,330
Manufacturing and utilities	170	40	10	230	1,620
Construction and quarrying	1,090	160	30	1,280	4,940
Wholesale and retail trades	940	170	50	1,160	7,990
Hotels, restaurants & bars	360	160	50	580	6,540
Transport, storage & communication	270	30	20	330	2,740
Finance and legal activities	310	90	100	500	12,400
Education, health and other services	1,050	150	60	1,260	6,160
Other business activities	1,220	110	30	1,360	4,650
Total	5,690	970	380	7,040	49,360

6. Employment

Unemployment

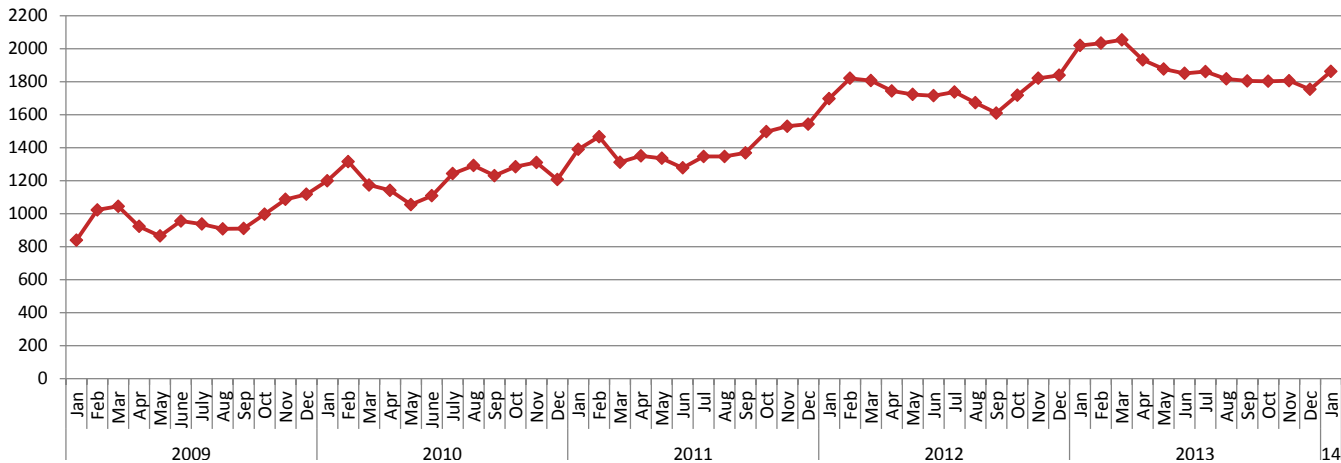
Jersey’s ILO unemployment rate⁸ in June 2013 was 5.7%, corresponding to approximately 3,200 people being unemployed and looking for work. The corresponding figure for the UK was 7.8%⁹. In March 2011 the youth unemployment rate (for 16-24 year olds) was 14.3% in Jersey, compared with 19.7% in the UK.

There is no legal requirement for unemployed residents of Jersey to register as actively seeking work (ASW) with the Social Security Department. The number of people registered as actively seeking work, therefore, should be regarded as an indicator rather than a measure of the actual level of unemployment in the Island.

On 31 December 2013, 1,750 people were registered with the Social Security Department as actively seeking work (ASW).

Figure 6.3 shows that the number of people registered as ASW in Jersey increased by more than 1,000 between January 2009 and January 2014, from 840 to 1,860 respectively. The latest total represents a fall of 190 from its peak of 2,054 in March 2013.

Figure 6.3 Registered Actively Seeking Work in Jersey 2009 - 2014



Further reading: Jersey Labour Market, biannual report by the Statistics Unit.
Jersey Registered Actively Seeking Work, monthly report by the Statistics Unit.
Jersey Census 2011, published by the Statistics Unit.

⁸ The International Labour Organisation (ILO) definition of unemployment includes all adults (aged 16 and over) who are not working but are looking for or waiting to take up a job. Figures for Jersey are calculated from the 2011 Census and the Jersey Annual Social Survey.
⁹ Jersey Annual Social Survey 2013

Employment status

Table 6.2 Profile of employment status, aged 16 or over, 2011 (percentages)

	Men	Women	Total
Working for an employer full-time	56	40	47
Working for an employer part-time	3	15	9
Self-employed, employing others	6	1	3
Self-employed, not employing others	6	2	4
Unemployed, looking for or waiting to take up a job	4	2	3
Retired	16	19	18
Looking after the home	~	10	6
In full-time education	5	5	5
Unable to work: sickness or disability	3	3	3
Unemployed, not looking for a job	1	1	1
Total	100	100	100

(Totals may not sum to 100% due to rounding)

Employment by Place of Birth and Gender

In relative terms, employment levels in Jersey are high. In 2011, 82% of people of working age in Jersey were economically active (i.e. in work or looking for work).

As Table 6.3 shows, the lowest rate was for Jersey-born residents (75%) and highest for people born in Poland (94%). The economic activity rate for Jersey-born residents of working age was lower than the rates of those born in other jurisdictions predominantly as a result of the number of Jersey-born people in full-time education.

Table 6.3 Economic activity and unemployment rates for working age adults by place of birth (percentages)

	Jersey	British Isles	Ireland	Poland	Portugal/Madeira	Other European country	Elsewhere in the world
Economic activity rate	75	85	88	94	90	88	83
Unemployment rate	6.4	3.7	3.1	2.9	4.2	4.9	4.4

Almost one in six (15%) adults over working age (i.e. over 59 years for women and over 64 years for men) were economically active.

6. Employment

Table 6.4 Industry of employment by gender for working age (percentages), 2011

	Female	Male
Agriculture and fishing	24	76
Finance (including legal work)	56	44
Construction and tradesmen	5	95
Wholesale & retail	45	55
Transport, storage and communication	22	78
Education, health and other services (private sector)	69	31
Hotels, restaurants and bars	42	58
Electricity, gas and water	20	80
Manufacturing	22	78
Public Sector	45	55
All	45	55

Further reading: Jersey Census 2011 Report, Statistics Unit.

Number of Hours Worked

At the time of the 2011 Census, full-time employees (including the self-employed) worked an average of 39.8 hours per week.

Table 6.5 Average hours worked per week by employees, 2011

Year	Full-time			Part-time			Full- & Part-time		
	Male	Female	All	Male	Female	All	Male	Female	All
Working for an employer	40.6	37.4	39.2	17.7	18.5	18.4	39.7	33.6	36.8
Self-employed	45.8	43.2	45.4	17.4	15.7	16.5	43.3	34.0	41.2

Further reading: Jersey Census 2011 Report, Statistics Unit.

Table 6.6 presents the average number of hours worked by full-time employees by industry. Workers in Agriculture and fishing worked the longest hours, averaging over 45 hours per week.

Table 6.6 Average hours worked per week by industry (full-time workers), 2011

Sector	2011
Agriculture and fishing	45.4
Manufacturing	40.8
Construction and quarrying	41.9
Electricity, gas, water supply	38.6
Finance	37.6
Hotels, restaurants and bars	43.6
Transport and communications	40.2
Wholesale and retail	40.3
Miscellaneous business activities	40.4
Education, health and other services	38.6
All full-time workers	39.8

Further reading: Jersey Census 2011 Report, Statistics Unit.

Work Permits

Between 2004 and 2005, the number of work permit applications to work in Jersey fell by almost three-quarters. The fall occurred predominantly in the 'Hotel and Restaurants' and 'Agriculture' sectors and was largely a result of the entry of eight nations into the EU in May 2004, thereby removing the requirement of work permits for such nationals. No work permit applications were refused in 2013.

Table 6.7 Numbers of Work Permits Issued by Sector, 2004-2013

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Applications received	1,501	394	386	409	509	358	343	338	239	252
Total Permits issued	1,479	389	381	405	492	353	333	334	236	252
By Sectors:										
Finance	40	71	97	161	242	126	125	106	103	97
Hotels & Restaurants	826	175	149	112	95	84	72	73	59	59

Further reading: Customs and Immigration Service, Annual Reports.

7. Prices and Earnings

Jersey (All-Items) Retail Prices Index, RPI

During the twelve months to December 2013, the All-Items Retail Prices Index (RPI) for Jersey increased by 1.9% to stand at 156.4 (June 2000 = 100).

The increase of the RPI over the twelve months to September was 1.2%; hence the annual rate of inflation increased by 0.7 percentage points (pp) in the latest quarter. The Motoring group accounted for 0.4 pp of the 0.7 pp increase in the annual rate of inflation. This upward contribution from Motoring to the change in the rate of increase to the RPI was the result of a smaller decrease in average prices over the twelve months to December 2013 compared with that seen over the twelve months to September 2013.

Two measures of underlying inflation for Jersey are published; RPI(X) which is the RPI excluding mortgage interest payments and RPI(Y) which is RPI excluding mortgage interest payments and indirect taxes such as GST and impôts.

For a detailed comparison of the Jersey, Guernsey and UK consumer price indices and price levels: see Comparison of Consumer Prices in Jersey and the UK – June 2013, Statistics Unit

Table 7.1 Jersey All-Items Retail Prices Index (RPI) in Jersey, the UK and Guernsey and the RPI(X) and RPI(Y) for Jersey, 2007-2013

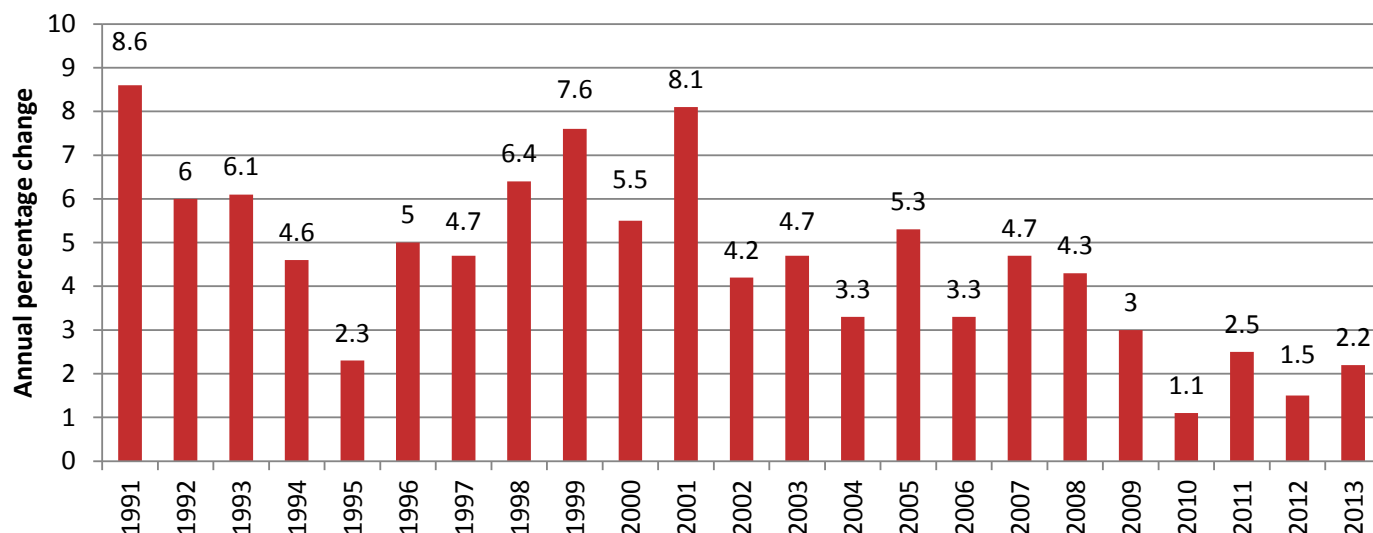
		RPI Index June 2000=100	Annual Movements (%)				
			Jersey	UK	Guernsey	RPI(X) Jersey	RPI(Y) Jersey
2007	Dec	133.3	4.5	4.0	4.9	3.2	3.5
2008	Dec	137.7	3.3	0.9	1.2	5.2	3.2
2009	Dec	140.0	1.7	2.4	2.2	3.5	3.6
2010	Mar	141.7	3.2	4.4	3.4	3.3	3.4
	Jun	142.4	2.8	5.0	2.3	2.6	2.7
	Sep	142.6	2.1	4.6	1.6	1.9	2.0
	Dec	143.2	2.3	4.8	2.3	2.1	2.2
2011	Mar	146.1	3.1	5.3	2.9	2.9	3.1
	Jun	148.8	4.5	5.0	3.0	4.4	3.0
	Sep	150.3	5.4	5.6	3.5	5.5	3.9
	Dec	150.4	5.0	4.8	3.2	5.1	3.7
2012	Mar	153.0	4.7	3.6	3.5	4.9	3.5
	Jun	153.3	3.0	2.8	3.2	3.2	3.1
	Sep	154.5	2.8	2.6	3.0	2.9	3.1
	Dec	153.5	2.1	3.1	3.2	2.2	2.1
2013	Mar	155.2	1.4	3.3	2.6	1.6	1.3
	Jun	155.6	1.5	3.3	2.7	1.6	1.4
	Sep	156.4	1.2	3.2	2.7	1.4	1.2
	Dec	156.4	1.9	2.7	2.7	2.1	2.0

The annual change in RPI(Y) was calculated for the first time for Jersey in December 2007.

Earnings

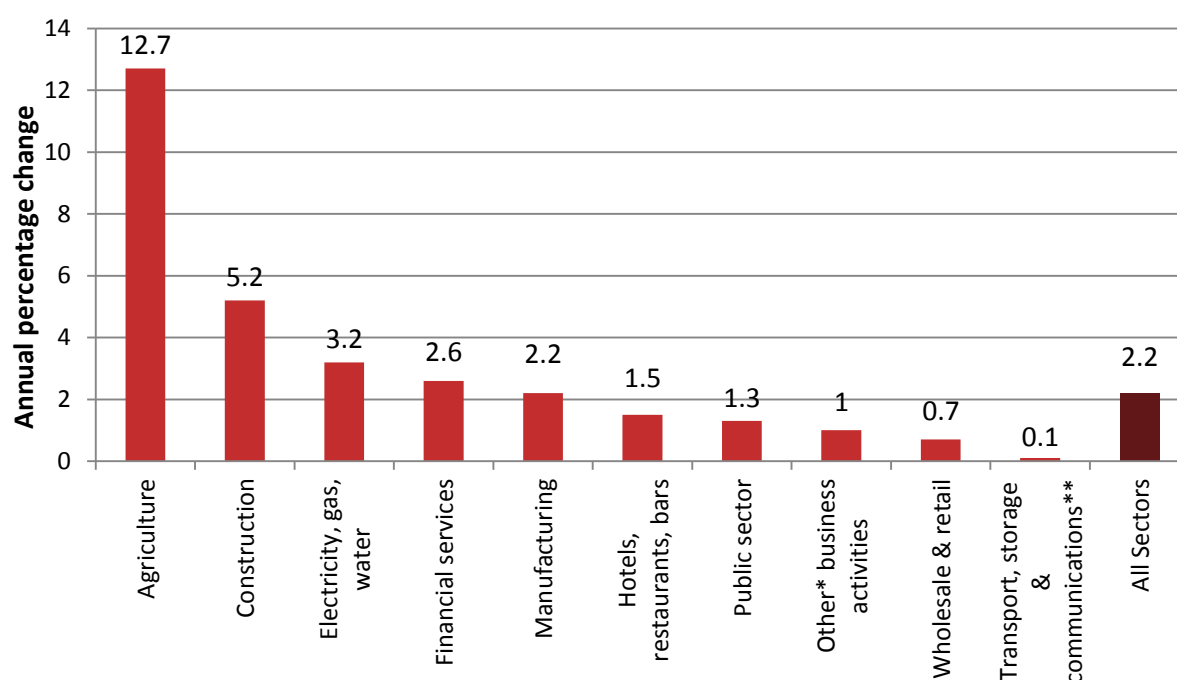
The Index of Average Earnings measures changes in gross wages and salaries paid to employees. It includes overtime payments, but excludes bonuses, employers' insurance contributions, holiday pay and benefits in kind (e.g. free accommodation).

Figure 7.1 Annual Change (%) in Average Earnings, 1991-2013



Average weekly earnings of workers in Jersey in June 2013 was 2.2% higher than in June 2012. The average annual increase in earnings during the most recent five-year period, since the global economic downturn in late 2008, has been 2.1% per annum, a rate of increase lower than any annual increases seen in the preceding two decades.

Figure 7.2 Annual Percentage Change in Average Earnings by Sector, 2013



*'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, Jersey Harbours and Coastguard, Jersey Post and Jersey Telecom).

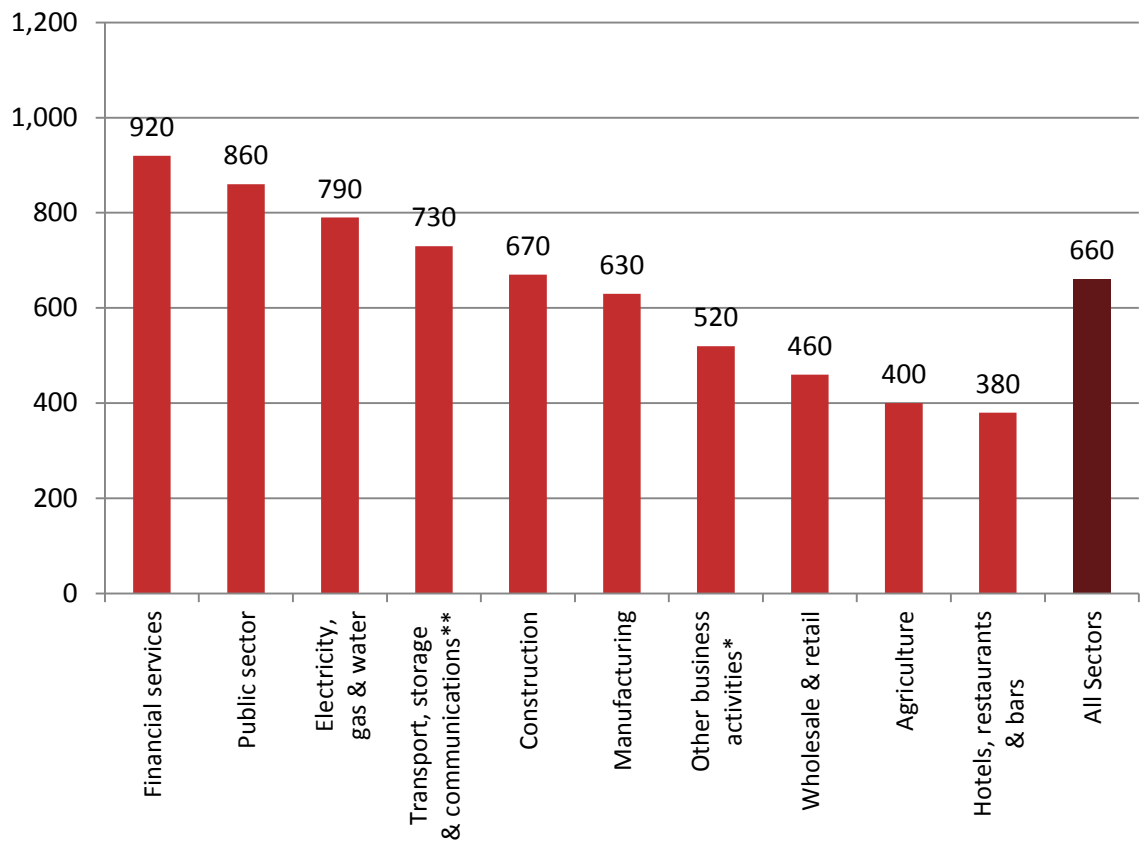
7. Prices and Earnings

As shown in Figure 7.2, the majority of industries in the private sector saw annual earnings increase by less than 3% over the twelve months to June 2013. Over the twelve months to June 2013 average earnings in the public sector rose by 1.3%. The annual increase in public sector earnings was predominantly due to a scheduled pay award for the majority of public sector workers (1% in January 2013).

The survey from which earnings data is compiled is strictly designed to measure changes in earnings rather than the level. The earnings levels shown in Figure 7.3 should therefore be considered as reasonable approximations. Furthermore, it should be noted that average weekly earnings figures refer to full-time equivalent (FTE) employees; part-time workers would earn proportionately less corresponding to the numbers of hours worked.

The average weekly earnings of FTE employees in Jersey in June 2013 was £660. The Financial services sector had the highest average weekly earnings (£920 per FTE), whilst Hotels, Restaurants and bars had the lowest (£380 per FTE).

Figure 7.3 Average Weekly Earnings, per FTE, by sector, 2013, (£ per week)



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

** Transport, storage and communication includes the former and current States Trading Committees.

Finance services: excludes bonuses; the Survey of Financial Institutions estimated the average weekly bonus per FTE was £110 in 2012.

The Jersey Income Distribution Survey (IDS), which was carried out over the twelve month period from May 2009 to May 2010, collected the necessary household and individual income information required to determine median income from earnings. The results derived from the IDS data have been up-rated from the survey period to June 2013 using the Jersey Index of Average Earnings.

The estimated median earnings in June 2013 was £540 per week per FTE.

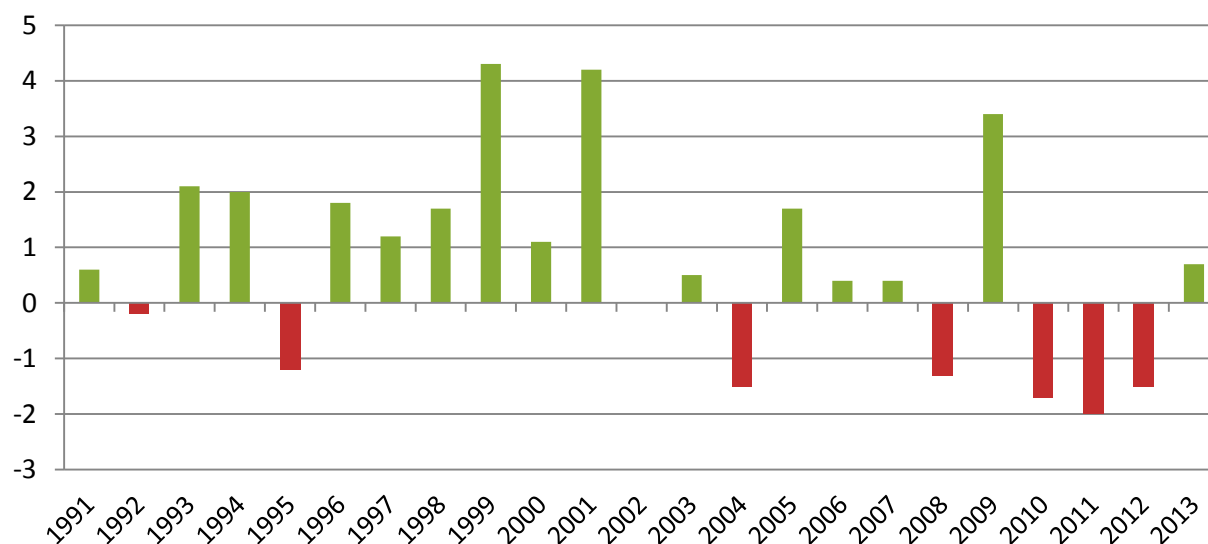
Comparison with Retail Price Indices

During the twelve months to June 2013 the Jersey All Items Retail Prices Index (RPI) rose by 1.5%.

Average earnings increased by 2.2% during the last twelve months, implying that earnings increased by 0.7 percentage points more than prices over the period.

Figure 7.4 illustrates the difference between the annual change in average earnings and the annual change in the RPI for each year from 1991 to 2013. Earnings have increased in Jersey at a lower rate than earnings in seven out of the last 23 years (shown as negative values in Figure 7.4).

Figure 7.4 Difference between annual changes in average earnings and the RPI, 1991 to 2013 (percentage points)



It is evident that prior to 2003 the growth of earnings in Jersey had been greater than that of prices. The higher earnings growth was particularly prominent in 1999 and 2001 when earnings increased by around 4 percentage points more than prices.

More recent years have constituted a different period in the relative behaviour of prices and earnings compared to that seen prior to 2003; in four out of the last six years, earnings have risen by less than prices. The latest increase is the first time in four years that earnings have risen at a greater annual rate than prices.

7. Prices and Earnings

The long-term growth of earnings in Jersey, historically, has increased at a faster rate than retail prices.

Figure 7.5 Jersey’s Index of Average Earnings and Retail Prices Index (June 1990 = 100)

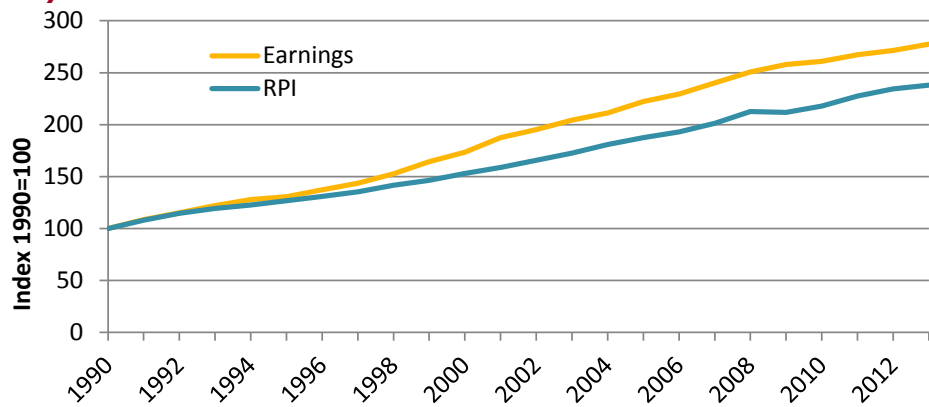


Figure 7.5 shows that over the longer-term (since 1990) earnings have risen more than prices. This is reflected in the long-term annual averages, with earnings rising by an average of 4.5% per annum since 1990 compared with 3.8% per annum for prices.

Further reading: Index of Average Earnings Index and Jersey Economic Trends, Statistics Unit.
Further reading: Jersey Income Distribution Survey, Statistics Unit.

Comparison of Jersey and UK consumer price levels

In 2013, price levels for consumer goods and services (excluding housing costs, health and education) in Jersey were 9% greater than the UK average. Consumer price levels were marginally greater in Jersey than in London (by 2%). When housing, health and education costs are taken into account, the overall estimated relative price level for goods and services in Jersey was 20% greater than the UK average.

Figure 7.6 presents the percentage differences in price levels between Jersey and the UK average for nine expenditure categories.

Figure 7.6 Percentage difference in price levels between Jersey and the UK for nine expenditure categories



Further reading: Jersey-UK Relative Consumer Price Levels for Goods and Services 2013

8. States of Jersey Income and Expenditure

In 2012, the States recorded an £11 million financial surplus following two years of planned deficits. The surplus of £11 million compared with a projected deficit of £20 million in the 2012 Annual Budget. Income exceeded projections by £16 million and States expenditure was £15 million lower than Budget.

2012 was the second year of a three-year financial plan to return to balanced budgets.

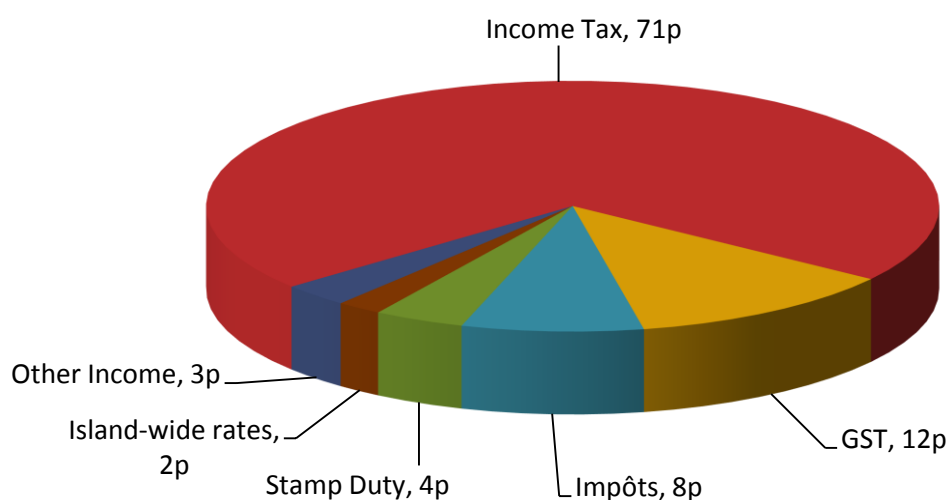
Table 8.1 States of Jersey Income and Expenditure, 2012

Budget 2012 £ million	Income	Actual 2012 £ million	Actual 2011 £ million
416	Income tax	431	409
80	Goods and Services Tax (introduced May 2008)	80	66
54	Impôts	54	51
24	Stamp duty	21	23
27	Other income	31	27
11	Island-wide Rates	11	11
612	Total income	628	587
(616)	Net Revenue Expenditure ¹	(601)	(599)
(4)	Budgeting Deficit (Business Plan basis)	(27)	(12)
(16)	Capital Expenditure Allocation	(16)	(13)
(20)	Surplus/(Deficit) after Capital Expenditure Allocation	11	(25)

The figures exclude depreciation and impairments. The income and expenditure of States Trading Operations are excluded as these are funded from their Trading Funds.

Source: States of Jersey Report and Accounts 2012, Treasury & Resources

Figure 8.1 Where each pound of States of Jersey money will come from in 2013



Source: States of Jersey Budget Statement 2013 - Addendum

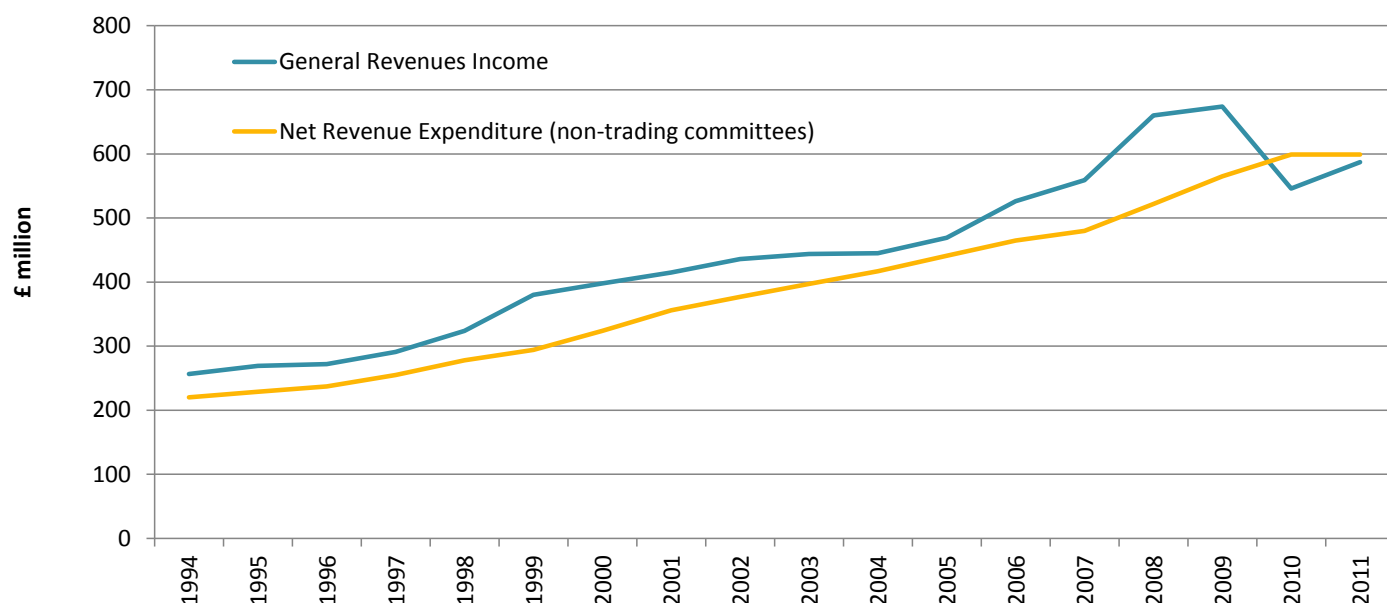
8. States of Jersey Income and Expenditure

Table 8.2 Budget allocations, 2013

States Funded Bodies	2013 Expenditure Allocation, £k
Ministerial Departments	
Chief Minister's	18,856
- Grant to Overseas Aid Committee	9,324
Economic Development	18,256
Education, Sport and Culture	104,334
Health and Social Services	184,262
Home Affairs	46,731
Housing	(26,798)
Department of the Environment	5,602
Social Security	183,354
Transport and Technical Services	25,599
Treasury and Resources	30,001
Non-Ministerial States funded bodies	
- Bailiff's Chamber	1,595
- Law Officers' Department	7,651
- Judicial Greffe	6,640
- Viscount's Department	1,368
- Official Analyst	609
- Office of the Lieutenant Governor	689
- Office of the Dean of Jersey	26
- Data Protection Commission	223
- Probation Department	2,124
- Comptroller and Auditor General	751
- States Assembly and its services	5,027
Central Contingency	
- Allocations for contingencies	-
- Restructuring Provision	5,098
- Corporate Procurement Savings	(3,451)
- Central Pay Provision	19,900
- Corporate Terms and Conditions Savings	(14,000)
Net Revenue Expenditure Allocation	633,771
Capital Expenditure Allocation	12,566
Total States Net Expenditure Allocation	646,337

Note: Allocations for Contingencies are funded from unspent balances carried forward to 2013.

Source: Medium Term Financial Plan 2013-2015 (as amended)

Figure 8.2 General Funds Income and Expenditure, 1996-2012

Source: States of Jersey Financial Report and Accounts 2012, Treasury & Resources

Table 8.3 Jersey Currency in Circulation (£ million), 2000-2012

Year	Notes	Coins	Total
2000	48.4	4.5	52.9
2001	55.8	4.9	60.7
2002	55.2	5.1	60.3
2003	61.0	5.4	66.4
2004	62.8	5.8	68.6
2005	64.5	6.2	70.7
2006	69.6	6.4	76.0
2007	75.6	6.7	82.3
2008	84.5	7.0	91.5
2009	83.4	7.3	90.7
2010	85.2	7.6	92.8
2011	82.7	7.9	90.6
2012	82.3	8.2	90.5

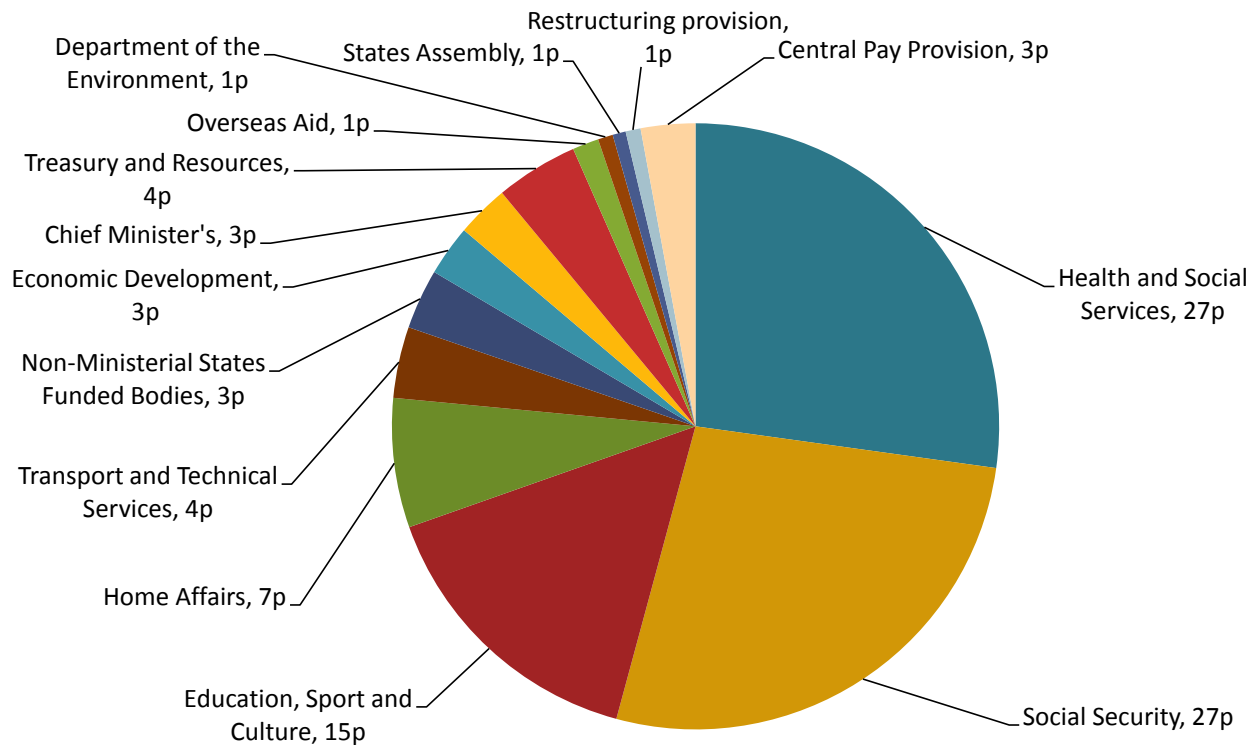
Figures as at 31st December of each year

Further reading: States of Jersey Annual Financial Report and Accounts, Treasury & Resources

8. States of Jersey Income and Expenditure

In terms of States expenditure, of every £1 the States will spend in 2013 about 27p will be on health, 15p on education and 27p on social security.

Figure 8.3 Where each pound of States of Jersey money will be spent in 2013



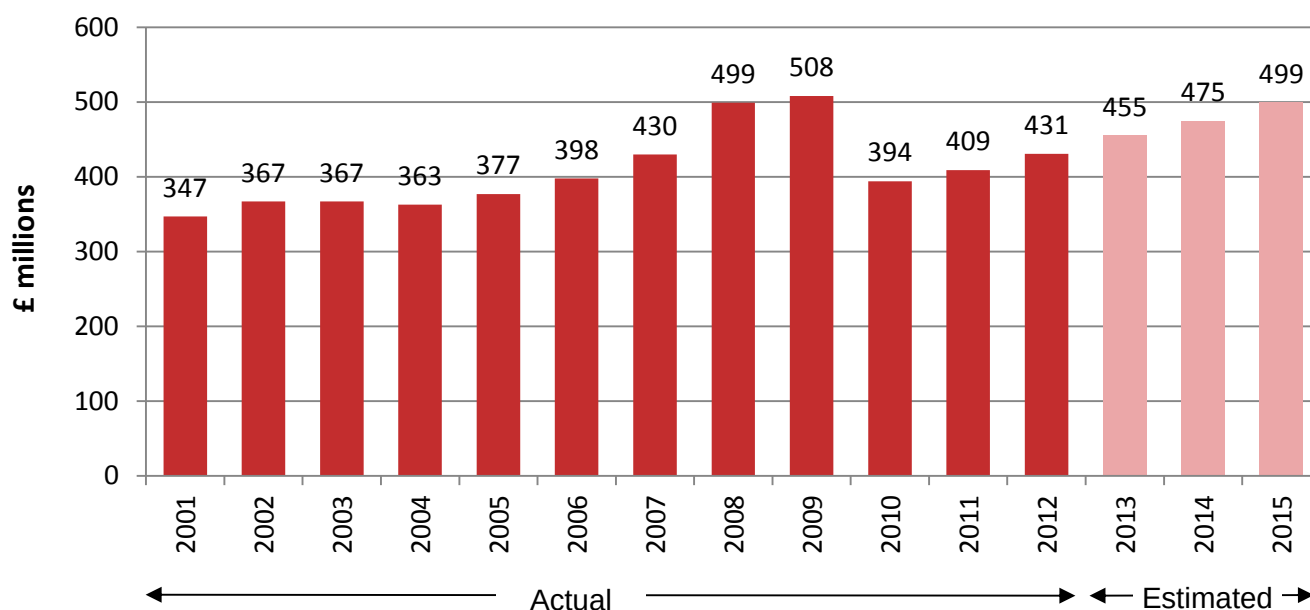
* Housing will provide a net return of £26.8 million

Source: Medium Term Financial Plan 2013-2015 (as amended), Treasury & Resources.

9. Tax Receipts

Income tax receipts of £431 million exceeded the expectations set in the 2012 Budget by £15 million. This was primarily a result of an increase in Personal Tax beyond that predicated as a result of employment numbers remaining robust despite the economy going through a difficult period.

Figure 9.1 Income Tax Receivable, Actual and Estimated, 2001-2015



Source: States of Jersey Budget Statement 2014 Treasury and Resources

Figure 9.2 Sources of Income Tax Receipts, Actual 2005-2012



Source: States of Jersey Financial Report & Accounts 2012 Treasury & Resources

9. Tax Receipts

Table 9.1 Levels of Tax Exemption and Allowance, Year of Assessment 2013 at standard 20% rate

Exemptions	Threshold (£)
Single person	13,780
Single person (aged 63+ years)	15,370
Married couple	22,090
Married couple (aged 63+ years)	25,280
Allowances	
Child allowance	3,000
Child allowance (higher education)	6,000
Additional allowance*	4,500
Wife's Earned Income Allowance**	4,500

* For people with single-handed responsibility for children
Further reading: States of Jersey Budget Statement 2013

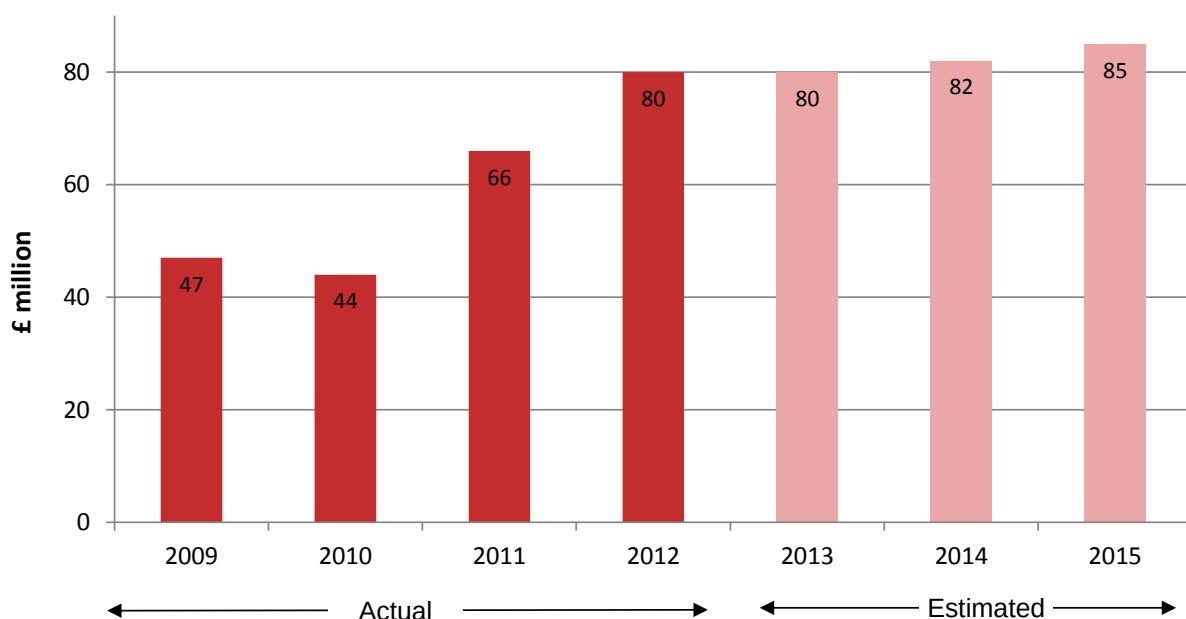
** For those tax payers in the marginal band

Goods and Services Tax (GST)

The States agreed in July 2005 to introduce a 3% broad-based Goods and Services Tax in May 2008.

As part of the Fiscal Strategy Review, the States agreed to increase the standard rate of GST from 3% to 5% effective June 2011. The increase in GST shown in Figure 9.3 for 2011 is for 7 months of the year only, with the full-year effect at the new rate of 5% shown in 2012.

Figure 9.3 Goods and Services Tax receipts, Actual and Estimated, 2009 - 2015



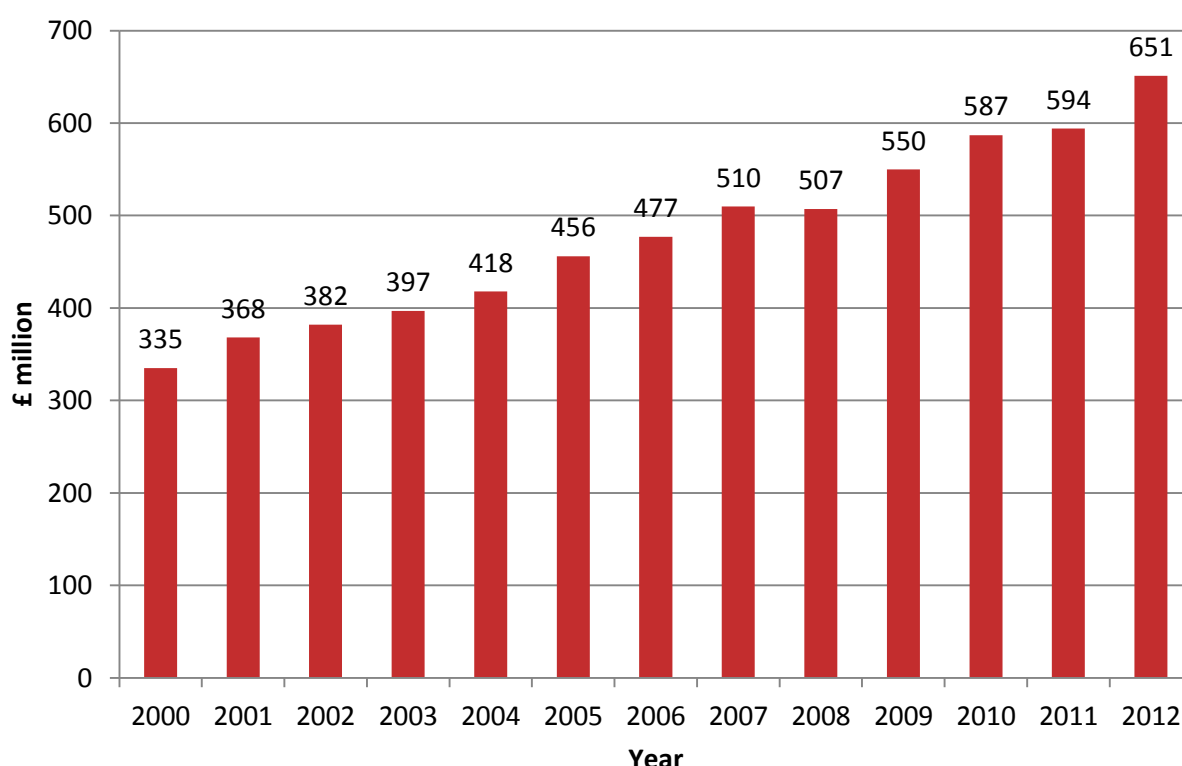
Source: States of Jersey Budget Statement 2014

GST is a consumption tax applicable to imports and supplies made in Jersey; it has a limited number of reliefs. Businesses in the financial services industry who generally have the majority of their activity outside Jersey may apply to be approved as an International Services Entity (ISE) for GST purposes. If approved, such companies pay a flat rate, or annual fee instead of accounting for GST.

The Strategic Reserve

The Strategic Reserve is a capital safeguard against unforeseen events and economic downturn.

Figure 9.4 Market Value of Strategic Reserve, 2000-2012



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

Source: States of Jersey Annex to Financial Report and Accounts, Treasury and Resources

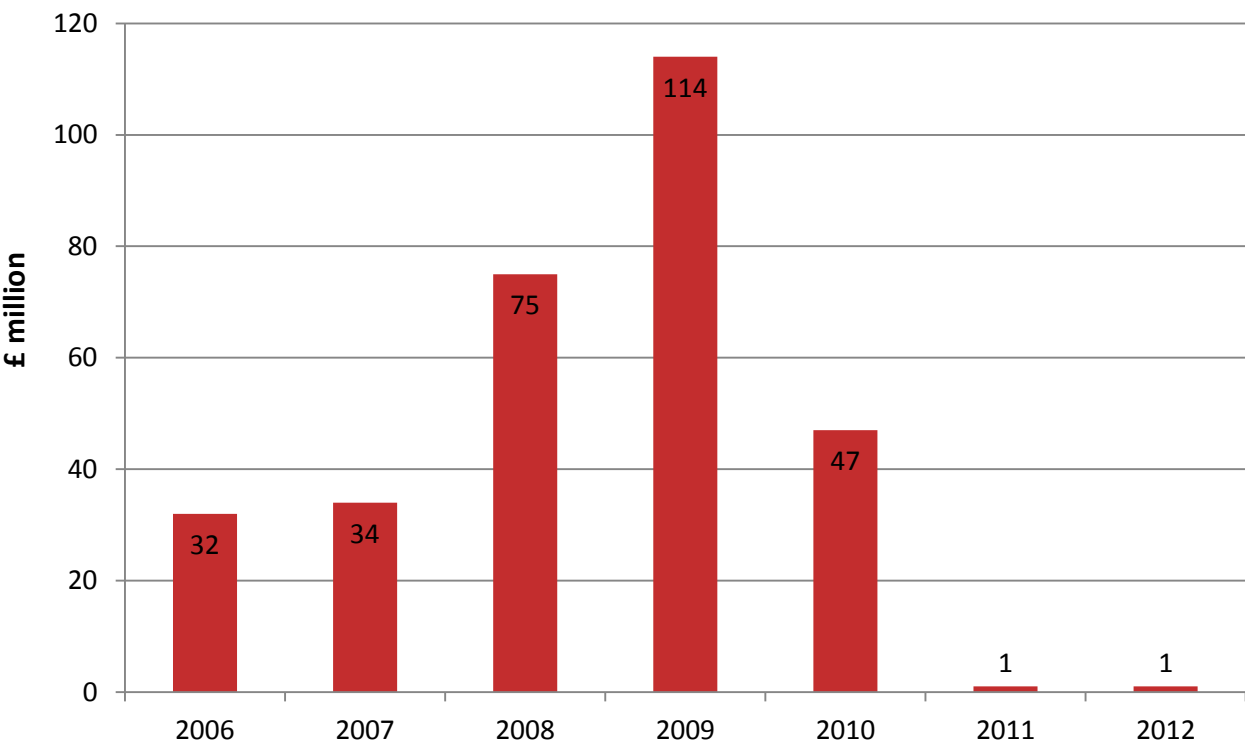
The Stabilisation Fund

In December 2006 the States agreed to establish a Stabilisation Fund for the purpose of providing protection from adverse impact of economic cycles, aiming to create a more stable environment with low inflation. The intention is that money will be paid into the Fund when the economy is growing strongly and drawn out from the Fund to support the economy when it is performing more weakly.

The Fund has been used to provide £44 million for the Economic Stimulus Package agreed by the States in 2009. A transfer of £68 million was made in 2010 to support the Consolidated Fund and a further transfer of £46 million was made during 2011 as agreed in the 2011 Budget.

The States plans to replenish the Stabilisation Fund once the economy recovers.

Figure 9.5 Market Value of Stabilisation Fund, 2006-2012

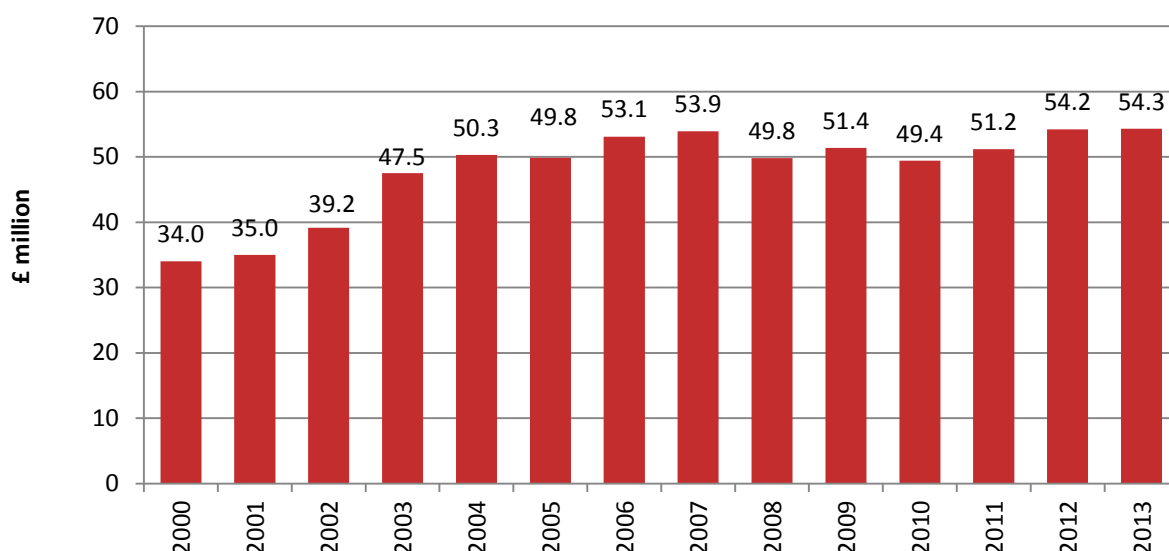


Figures are £ millions and stated at market value at 31 December each year.
Source: States of Jersey Annex to Financial Report and Accounts, Treasury and Resources.

10. Impôts

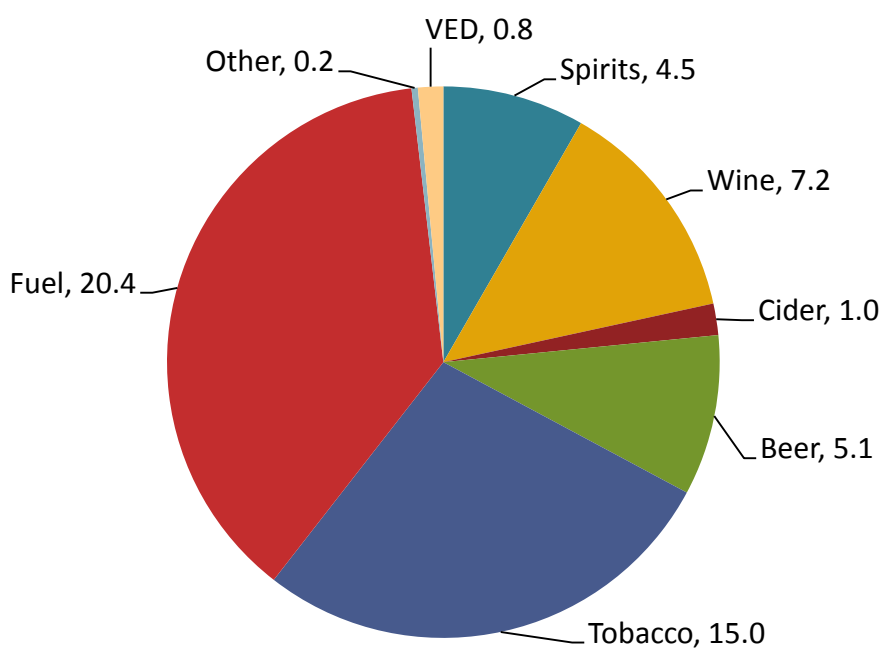
Impôt duty receipts in 2013 were £54.3 million, a similar figure to that seen in 2012 and some £3 million more than in 2011.

Figure 10.1 Customs and Excise Impôt Duty Collected, 2000-2013



In 2013 impôt duties on road fuel raised £20.4 million (38% of the total); tobacco duty raised £15.0 million (28% of the total).

Figure 10.2 Customs and Excise Impôt, Sources of Revenue, 2013
(Revenue in £ million)

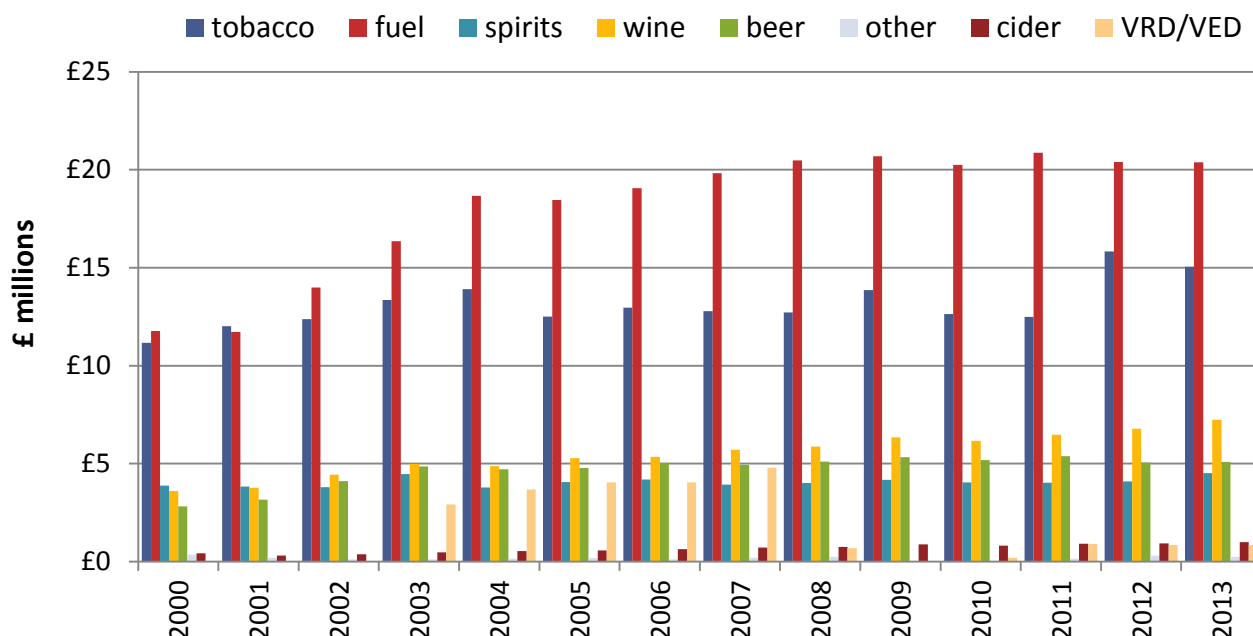


The revenue raised from road fuel has increased by around 9% over the past 10 years, from £18.7 million in 2004 to £20.4 million in 2013.

10. Impôts

Revenue from tobacco duty has also increased, from £13.9 million to £15.0 million over the same period. It should be noted, however, that the quantity of tobacco imported has fallen from 84,000kgs in 2004 to 50,000kgs in 2013, a reduction of approximately 40%.

Figure 10.3 Impôts Duty Receipts, 2000-2013



Note: VRD = Vehicle Registration Duty, introduced in 2003 and abolished in May 2008.
VED = Vehicle Emissions Duty, introduced September 2010

In 2013 beer imports were down by 20% on 2004 levels, while the quantity of spirits (litres of alcohol) has decreased by 17% over the same time period. The quantity of wine imported has remained similar over the last decade, whereas the quantity of dutiable cider has increased by 25%.

Table 10.1 Annual Quantity of Dutiable Goods, 2003-2013

	Quantity (thousands of litres)										
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Wine	4,066	3,832	4,153	4,059	4,188	4,007	4,228	4,129	4,045	4,149	3,924
Cider	1,050	1,133	1,223	1,310	1,430	1,329	1,509	1,481	1,575	1,600	1,415
Beer	11,303	10,664	10,837	10,411	9,863	9,876	9,484	9,426	9,139	8,699	8,518
Road fuel	51,878	50,577	50,032	49,033	50,106	52,016	51,420	50,960	46,970	48,160	46,225
Spirits (thousands Ltr of alc)	224.3	189.9	203.9	202.4	184.5	179.4	171.5	172.1	161.1	160.7	157.3
Tobacco (thousands of kg)	97.3	83.8	68.6	68.3	64.7	61.1	60.0	58.1	51.4	60.8	49.5

Further reading: Customs and Immigration Service, Annual Reports.

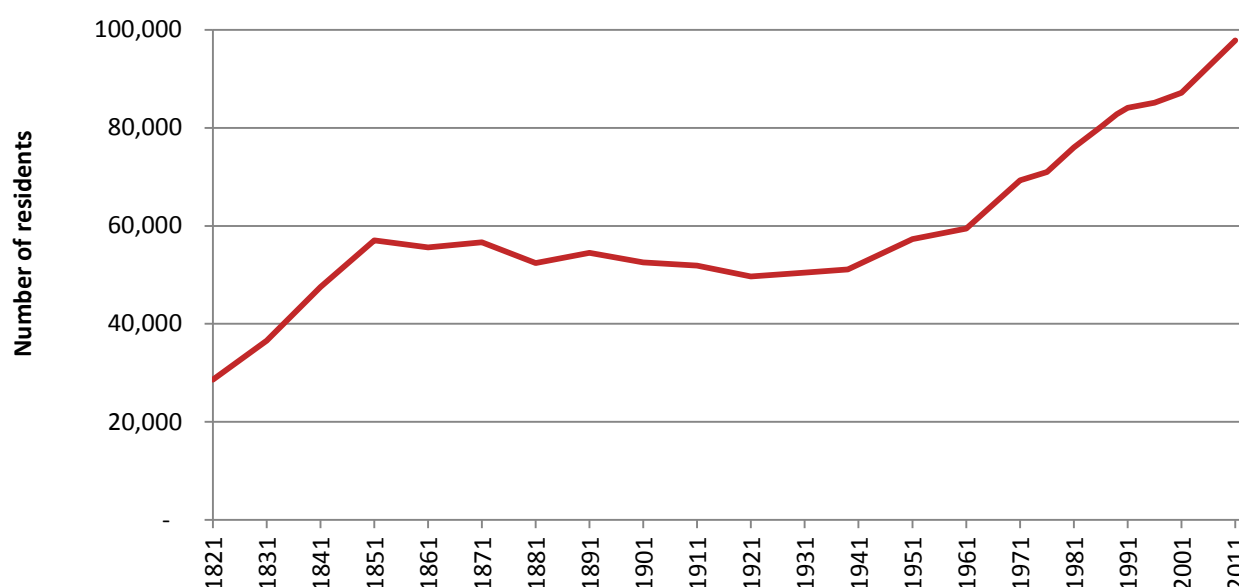
11. Population

Total Population

On 27th March 2011 (Census Day), the resident population of Jersey was 97,857.

The resident population of Jersey at the end of 2012 was estimated as 99,000, an increase of 900 from year-end 2011. This increase was comprised of natural growth (excess of births over deaths) of 400 and net inward migration of 500 people.

Figure 11.1 Jersey's Population, 1821-2011



Note: Population figures from 1981 to 2011 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 11.1 Total Resident Population, 1976-2011

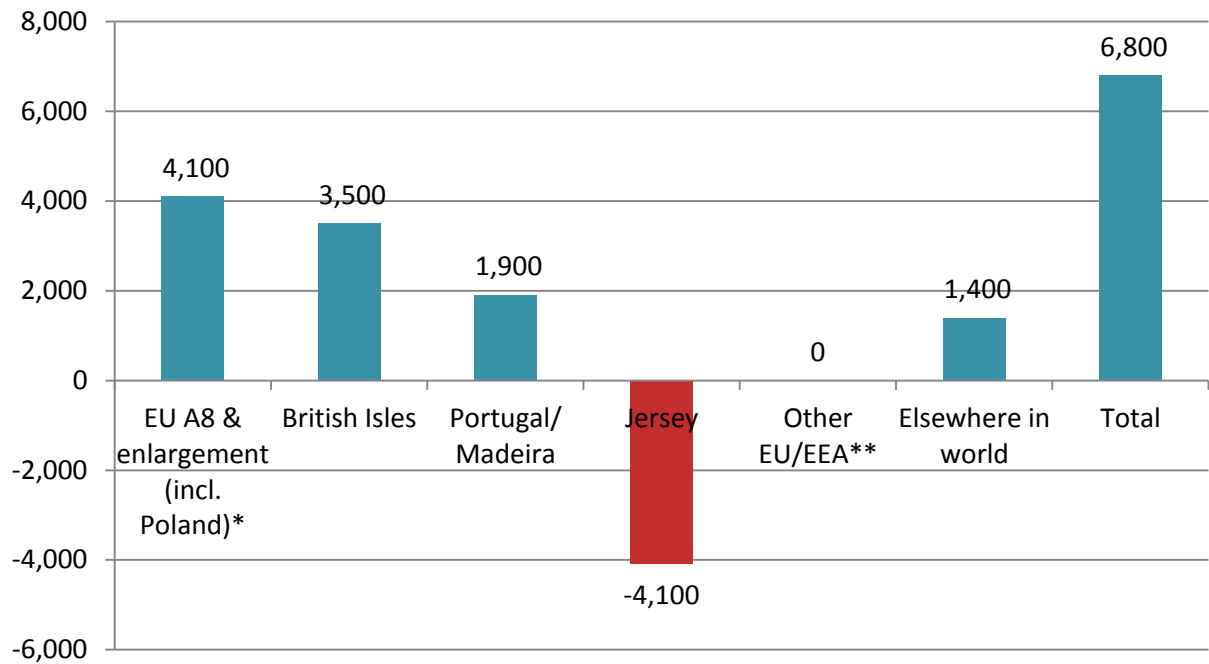
Census	Total		Year end estimate	Total
1976	71,018		2004	90,100
1981	76,050		2005	91,000
1986	80,212		2006	92,300
1989	82,809		2007	94,000
1991	84,082		2008	95,400
1996	85,150		2009	96,200
2000	87,100		2010	97,100
2001	87,186		2011	98,000
2011	97,857		2012	99,000

11. Population

Migration

Migration into and out of the Island consists of a dynamic ‘ebb and flow’ of migrants in both directions. The net migration in a given calendar year is therefore the difference between those migrants arriving and those leaving.

Figure 11.2 Net Migration, 2001 to 2011 by place of birth



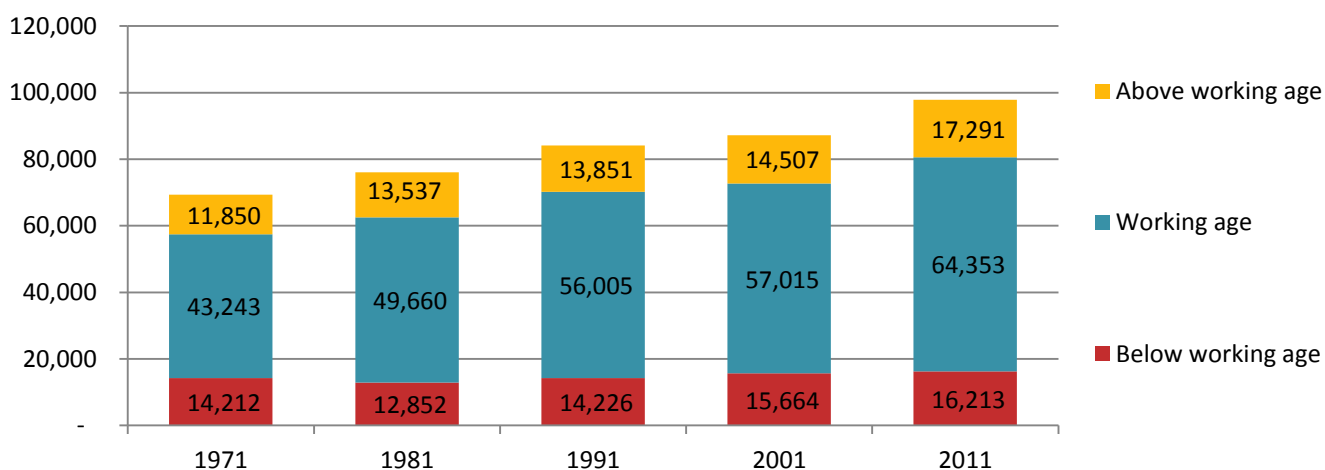
*EU A8 (2004): Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, Slovenia, Cyprus and Malta; and Enlargement (2007): Bulgaria, Romania.

**EU/EEA (2001 definition): Austria, Belgium, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Liechtenstein, Luxembourg, Netherlands, Norway, Spain, Sweden, Switzerland.

As can be seen from Figure 11.2, people born in countries which had recently joined the European Union were one of the largest contributors to the total net inward migration between 2001 and 2011. People born in Poland accounted for 3,100 of the total net migration from such countries.

Population Structure

In 2011, around two-thirds (66%) of the total resident population were of working age (women/men aged 16-59/64 years), about a sixth (18%) were above working age and another sixth (17%) below working age. These proportions have been substantially constant since 1981, although the absolute numbers in each category have increased.

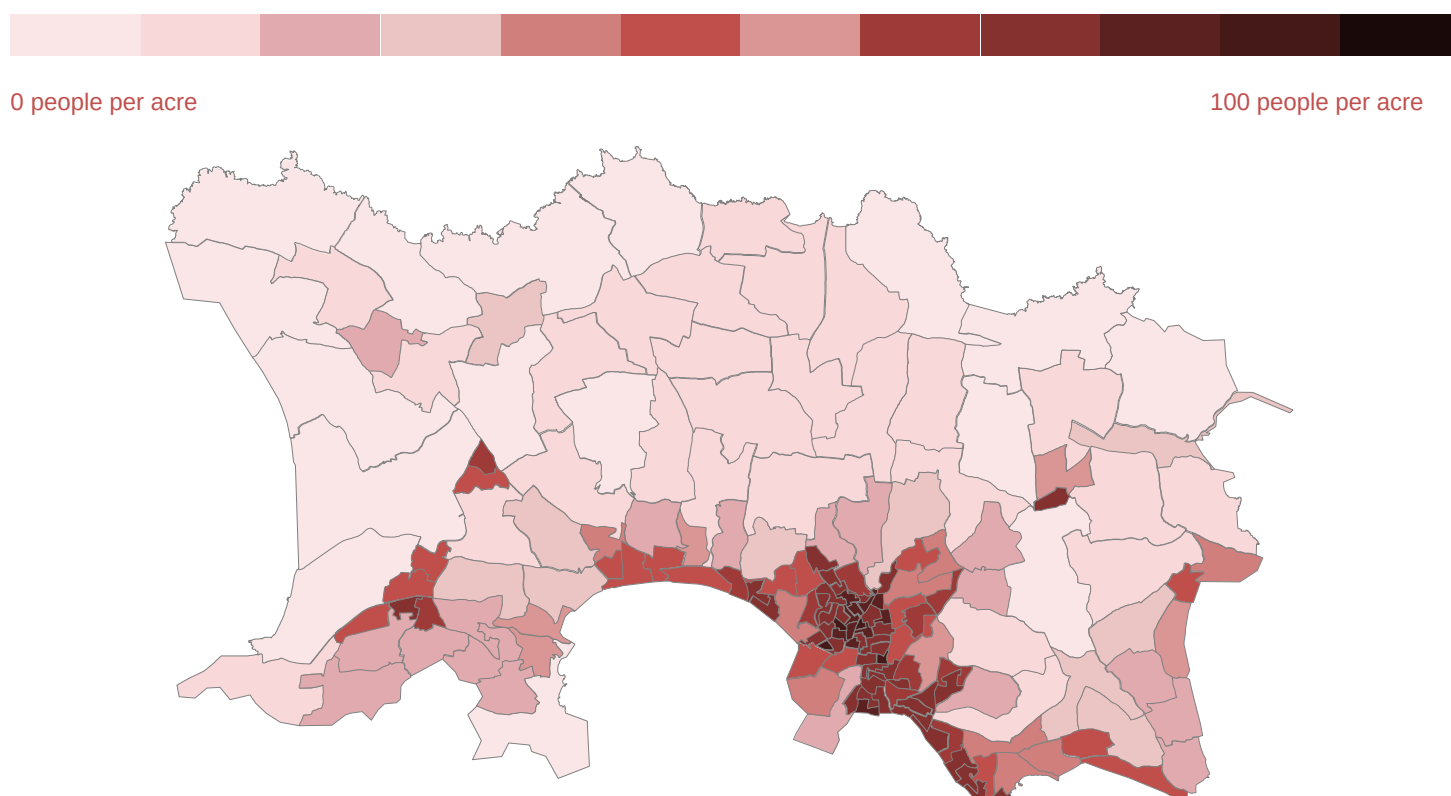
Figure 11.3 Age Structure with Respect to Working Age, 1971-2011

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

On Census Day March 2011, over four-fifths of the resident population of Jersey possessed housing qualifications within the 'a-h' category as defined under Housing Regulations. Around one in eight (13%) people in Jersey were non-locally qualified.

Population Density

The population density of Jersey is approximately double that of England and about a quarter less than Guernsey. Figure 11.4 shows the pattern of population density across the Island.

Figure 11.4 Population density in Jersey by Parish, (Census 2011)

11. Population

Passports

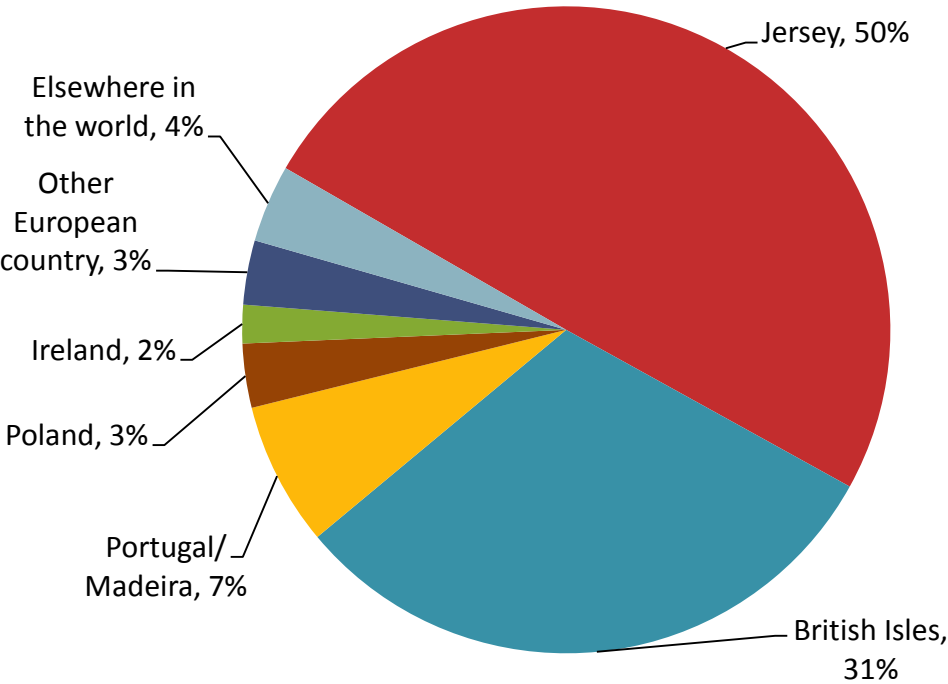
Table 11.2 Number of passports issued and documents legalised, 2007-2013

	2007	2008	2009	2010	2011	2012	2013
Passports issued	10,671	10,783	11,060	10,802	10,319	9,791	10,187
Documents legalised	10,197	9,602	8,192	8,695	8,441	8,152	8,567

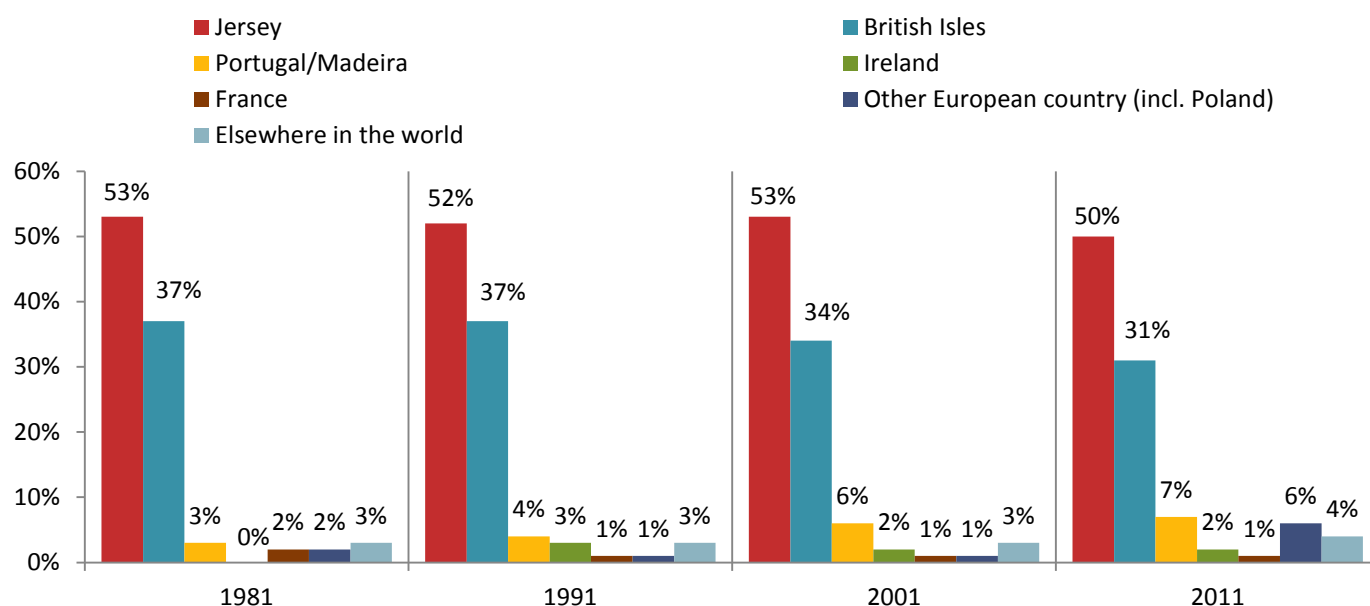
Place of Birth

At the time of the 2011 Census, half (50%) of the population were born in Jersey and almost a third of people (31%) were born elsewhere in the British Isles.

Figure 11.5 Population by place of birth, 2011



The Jersey Annual Social Survey (introduced in 2005), together with the Censuses, have shown how the origin of migrants to the Island has changed. Throughout the 1970s, 1980s and 1990s between half and two-thirds of ‘Other Europeans’ arriving in Jersey were from Portugal/Madeira. A significant change has occurred in recent years with the proportion arriving from Portugal/Madeira falling, whilst that from Poland has increased (see Figure 11.6).

Figure 11.6 Place of birth of residents over the last three decades

Source: Jersey Census 2011 Report, Statistics Unit.

Marital Status

In 2011, nearly half (48%) of adults in Jersey were either married or re-married. A further one in ten (10%) were divorced, whilst around a third (34%) had never married (see Table 11.3).

Table 11.3 Profile of marital status, percentages

Marital status	2001 Census	2011 Census
Married	44	40
Single	30	34
Divorced	8	10
Widowed	7	6
Re-married	8	8
Separated	3	2
Total	100	100

Note: Percentages independently rounded to nearest integer

The proportion of adults who are married has been declining over the last several decades, whilst the proportion divorced (and not re-married) has increased from 21 per 1,000 in 1971 to 101 per 1,000 population in 2011.

Further reading: Jersey Census 2011 Report, published by the Statistics Unit.
Report on the Jersey Census, 2001, published by the Statistics Unit.

12. Households

Dwellings

The 2011 Jersey census identified 44,698¹⁰ private dwellings and 157 communal establishments. Around one in fourteen (7%) of all private dwellings were vacant on census day – a total of 3,103 dwellings. St Helier had the highest number of vacant dwellings (1,397), whilst St Peter had the highest proportion of vacant dwellings, with a vacant rate of 9%.

Private Households

The number of private households in Jersey recorded in the 2011 Census was 41,595.

More than half of households in Jersey are owner-occupied, a third are privately rented (qualified or non-qualified) and around one in seven households are accommodated in social housing.

Table 12.1 Tenure of Private Households, 2001 and 2011, excluding vacants

	Number of dwellings, 2011	2011 percent	2001 percent
Owner-occupier	22,574	54	51
States, housing trust or parish rent	5,656	14	14
Qualified private rental	7,806	19	22
Staff, service or tied accommodation	1,274	3	13
Registered lodging house	652	2	
Lodger paying rent in private household	1,070	3	
Other non-qualified accommodation	2,563	6	
Total	41,595	100	100

¹⁰ Private dwellings as measured by the census are not necessarily separate physical dwellings; in the census separate dwellings were identified where the occupants shared a living space and a cooking area and may not necessarily correspond to a dwelling with a separate entrance.

Number of Persons per Household

The average number of people per private household declined between the 1971 and 2011 Censuses¹¹. The declining trend in household size is apparent in Table 12.2.

Table 12.2 Average Number of Persons per Household, 1971-2011

	1971	1981	1991	2001	2011
Average number of persons per household	2.79	2.59	2.47	2.38	2.31

Property Type

The types of property people in Jersey live in shows that more than two-fifths (44%) are flat/maisonettes, whilst a quarter (26%) are detached houses and a further third (30%) are semi-detached or terraced houses (Table 12.3).

Over four-fifths (82%) of dwellings have one, two or three bedrooms. The majority of rental accommodation has either one or two bedrooms with nearly two-thirds (62%) of non-qualified accommodation having one bedroom. In contrast, almost seven out of ten (69%) of owner-occupier households have three or more bedrooms.

Table 12.3 Property types in 2011 and 2001, excluding vacants

	Property Type	Number of dwellings, 2011	2011 percent	2001 percent
House	Detached	10,808	26	29
	Semi-detached	7,990	19	19
	Terraced	4,528	11	11
Flat	Purpose built block	11,759	28	21
	Part of converted house	5,278	13	16
	In a commercial building	1,080	3	3
Temporary structure	Tent, boat or Portakabin™	152	~	~
All		41,595	100	100

The 2011 census found that 44% of 'single parent with dependent children' households were living in States, housing trust or parish rental accommodation. Over a quarter (28%) were living in owner-occupied accommodation. In contrast, over four-fifths (82%) of households with two or more pensioners lived in owner-occupied accommodation.

*Further reading: Report on the Jersey Census Bulletin 2011 Report, published by the Statistics Unit.
Reports on the Jersey Annual Social Survey.
Reports on the Jersey Housing Assessment 2013-2015.*

¹¹ The 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.

13. Housing

House Prices

The average price of dwellings is calculated by weighting together the average price for each of the following five categories: 1- and 2-bedroom flats; 2-, 3- and 4-bedroom houses (“houses” includes houses and bungalows). The resulting mix-adjusted average dwelling price is converted into the Jersey House Price Index (based to 100 for calendar year 2002). The index includes share transfer properties and is seasonally adjusted.

In order that the average price in a given period is independent of the particular “mix” of properties sold in that period, a “mix-adjusted” average is calculated for each period by weighting each property type by a constant proportion.

Figure 13.1 Annual Percentage Change in the Jersey House Price Index, 1986-2013

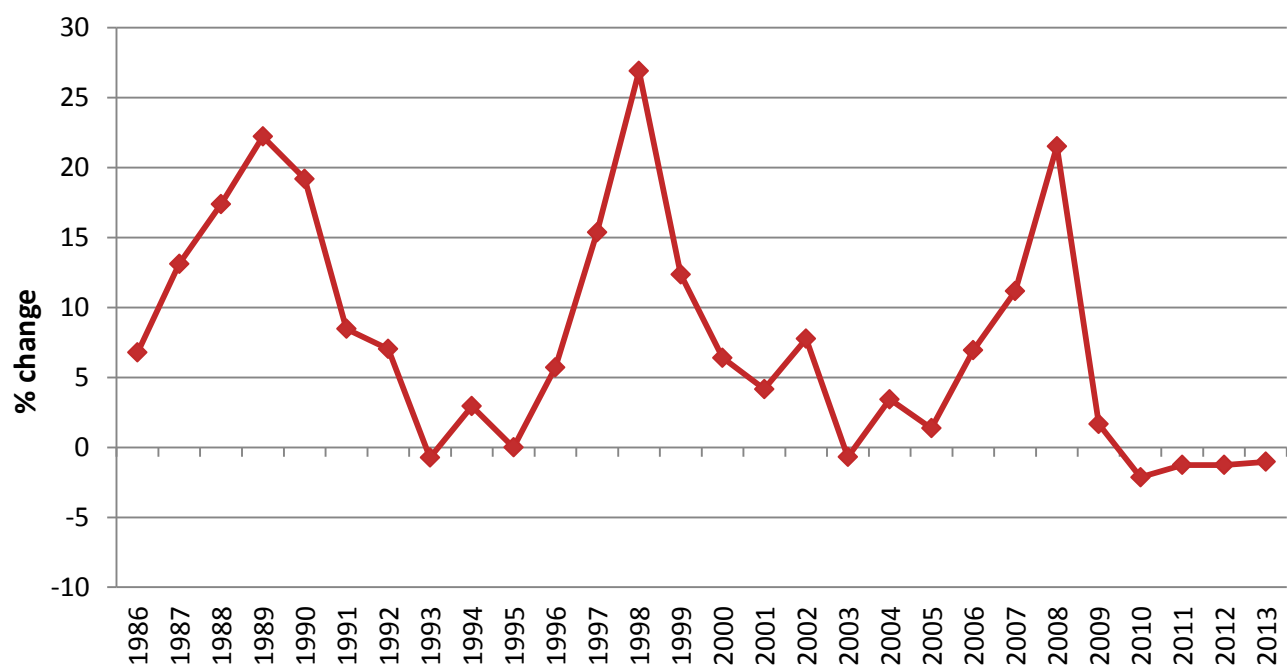


Figure 13.1 shows the annual average price changes from 1986 to 2013 on a calendar year basis. An annual rate of increase of 20% or higher has occurred in Jersey on three occasions in the last two decades: in 1989, 1998 and 2008. In the past, these peaks have been followed by periods of lower rates of increase or, more recently, by a sustained period of decline on an annual basis.

More recently, over the period covered by the new Jersey House Price Index, property prices overall were effectively flat between 2002 and 2003, increased at a rate of about 3% per annum in both 2004 and 2005, at almost 7% in 2006 and at 13% in 2007. Calendar year 2008 saw a greater rate of price growth; the overall average price of dwellings sold in 2008 was 20% higher than in 2007.

2013 represents the fourth consecutive year in which the average dwelling price has decreased marginally on an annual basis; over the five-year period from 2009 to 2013, the overall mean price has fallen by 6%.

Mean prices for specific property types from 2006-2013 are shown in Table 13.1.

Table 13.1 Mean Prices (£,000) for Individual Property Types, 2006-2013

Period	Flats		Houses		
	1-bed	2-bed	2-bed	3-bed	4-bed
2006	170	255	297	381	493
2007	180	251	340	435	571
2008	234	325	400	518	677
2009	232	319	400	522	723
2010	214	308	409	512	715
2011	198	333	383	511	680
2012	205	342	391	487	671
2013	210	332	375	484	674

Prices are rounded to the nearest £1,000.

Median House Prices

Although the overall mix adjusted House Price Index is calculated from the mean prices of property types and sizes, examining changes in the median price of dwellings can provide a complimentary insight into the behaviour of residential property prices in Jersey.

Over the decade to 2013, the mean and median prices of 2-bedroom houses have been similar. In most years the difference between the mean and median price of such properties has been less than £20,000.

For 3-bedroom houses, prior to 2010 the difference between the mean and median prices was generally less than £20,000. However, in the latest four years (2009 to 2013) the difference has been around £40,000 lower than the mean.

The difference in the mean and median prices of 4-bedroom houses, has for the most part, been less than £30,000 during the last ten years (median prices below mean).

13. Housing

Table 13.2 shows median property prices of 2-, 3- and 4-bedroom houses on an annual basis from 2006-2013.

Table 13.2 Median property price of houses sold in Jersey, 2006-2013

Period	Houses		
	2-bed	3-bed	4-bed
2006	298	365	479
2007	330	420	575
2008	390	490	699
2009	400	506	714
2010	393	475	716
2011	375	465	688
2012	390	455	638
2013	360	445	650

Prices are rounded to the nearest £1,000.

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

Jersey Housing Affordability Index

In 2012:

- the mean price of 1-bedroom flats was around 3 times the mean gross household income, whilst for 2-bedroom flats this ratio was greater than 5;
- the ratio of mean price to mean gross household income was around 6 for 2-bedroom houses, greater than 7 for 3-bedroom houses and greater than 10 for 4-bedroom houses;
- more than two-fifths of all working households could not service a mortgage affordably on the purchase price of a property at the lower quartile price, a similar proportion to 2011.

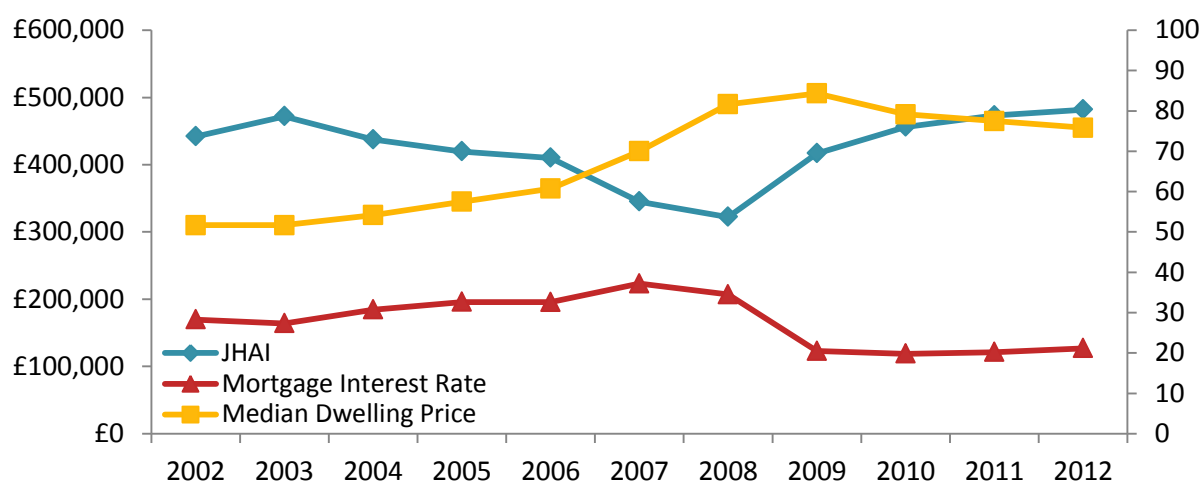
The principal indicator, the Jersey Housing Affordability Index, showed that between 2002 and 2012, a working household with mean net income was not able to service a mortgage affordably on the purchase price of a median priced house of any size.

A working household with mean net income was able to service a mortgage affordably on the purchase price of a median price 1-bedroom flat through the period 2002-2012 and on a median priced 2-bedroom flat for most of the past 10 years, but not in 2006 or 2008.

Housing affordability in Jersey has slightly improved in the latest two years compared with 2010. This slight improvement in affordability has been driven by a small decrease in the overall median property price.

In 2012 the level of income required to service mortgage payments on a median priced dwelling affordably was 2.2 times the mean individual earnings of a FTE employee.

Figure 13.2 The Jersey Housing Affordability Index, median dwelling price (3-bedroom houses) and mean mortgage interest rates, 2002-2012

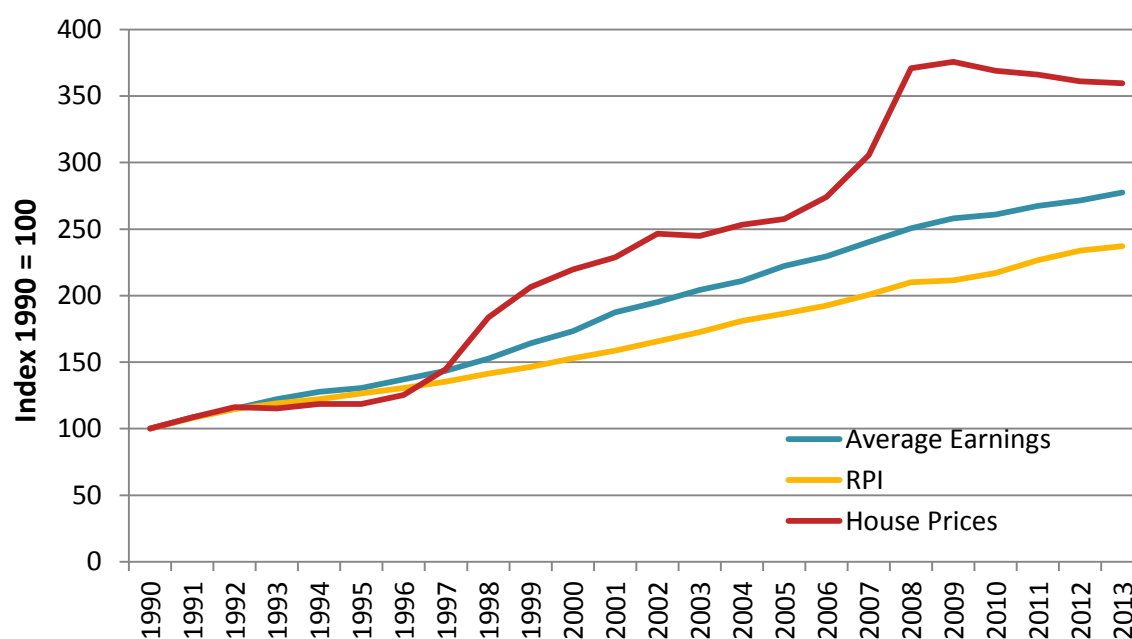


Further reading: *The Jersey Housing Affordability Index 2002-2012*, States of Jersey Statistics Unit

House prices, retail prices and earnings

A comparison between the Jersey Retail Prices Index, the Index of Average Earnings and the House Price Index is shown in Figure 13.3. Since 1997, house prices in Jersey have seen a greater overall increase than earnings and retail prices.

Figure 13.3 Retail Prices, Average Earnings and House Price Indices, (1990=100)



14. Education

Highest educational qualification attained

The 2011 Census asked adults aged 16 or over to provide information on all educational qualifications attained. Table 14.1 shows a comparison with the 2001 Census.

Table 14.1 Highest level of educational qualification (working age)

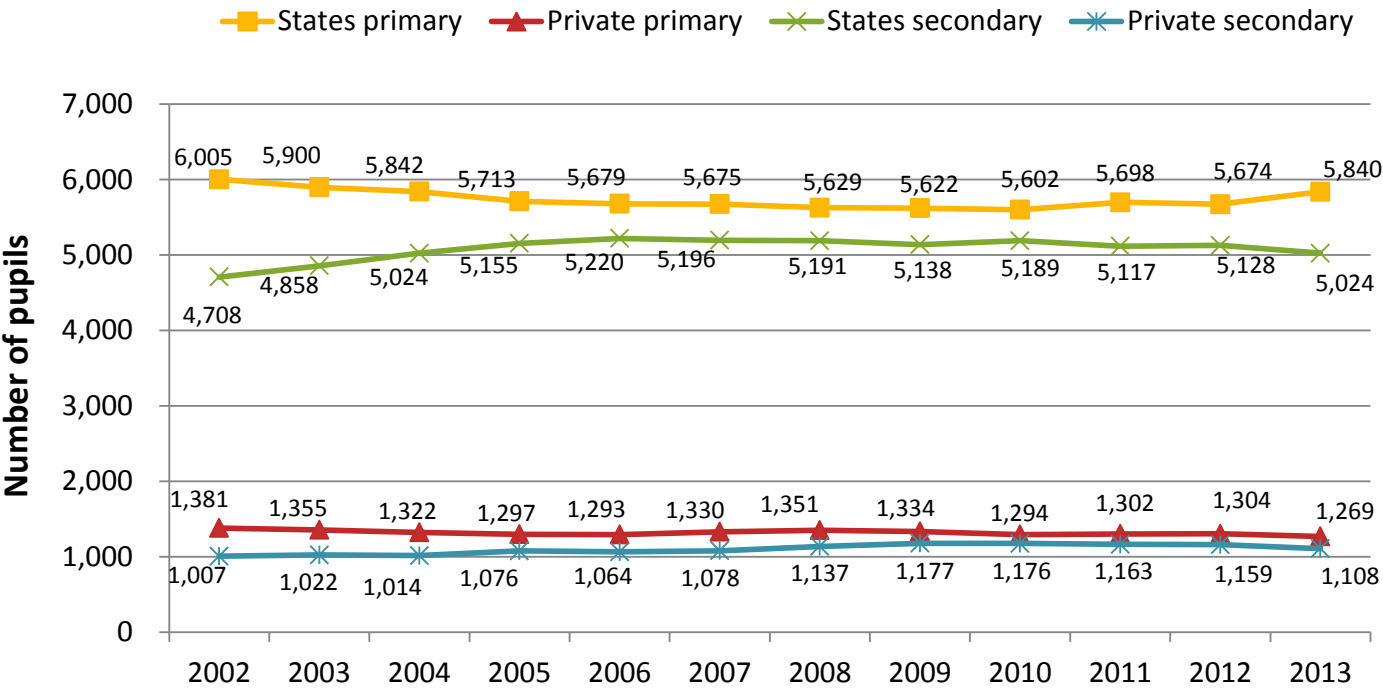
Highest Qualification (or equivalent)	2001 Percent	2011 Percent
Higher education	13	34
Secondary level	48	45
Other	6	2
No formal qualifications	34	20
All	100	100

Further reading: Jersey 2011 Census Report.

Number of Pupils

The total number of children in primary and secondary education in Jersey increased by 140 between 2002 and 2013 (from 13,100 to 13,240), comprising an increase of 417 in secondary schools and a decrease of 277 in primary schools.

Figure 14.1 Number of pupils in Primary and Secondary Education, 2002-2012

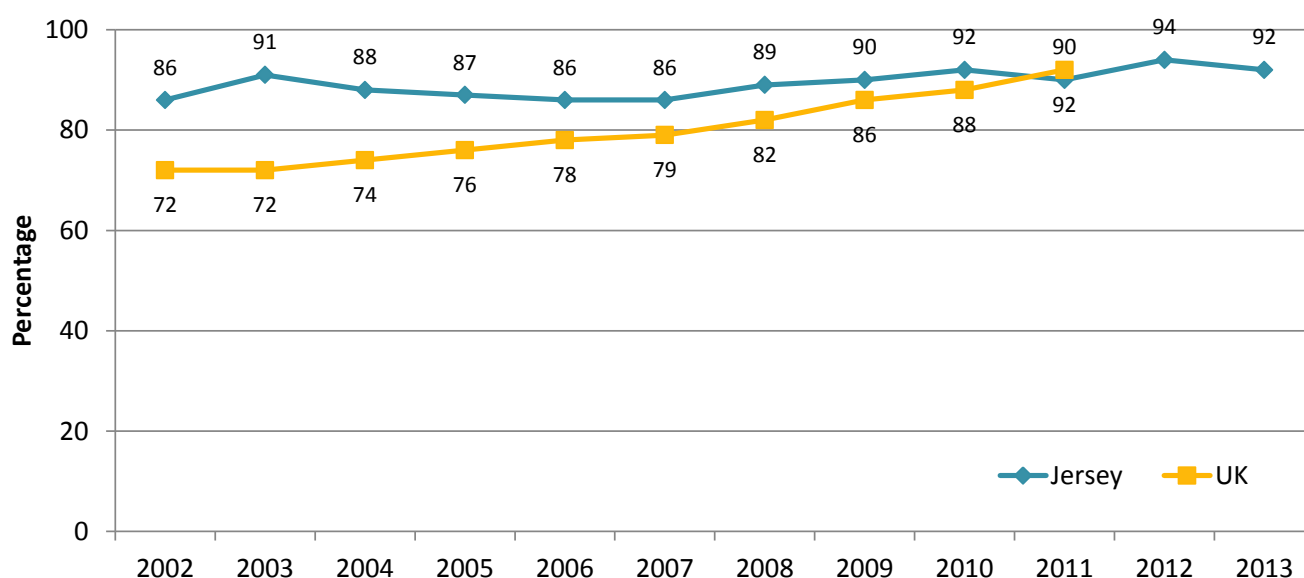


Figures are for January of each year.

Students Remaining in Education

In 2013, 92% (984) of Jersey students stayed on in full-time education after 16 years of age. This is similar to the level seen in 2012 (94%).

Figure 14.2 Percentage of students staying on in full-time education post 16 years of age, 2002-2012

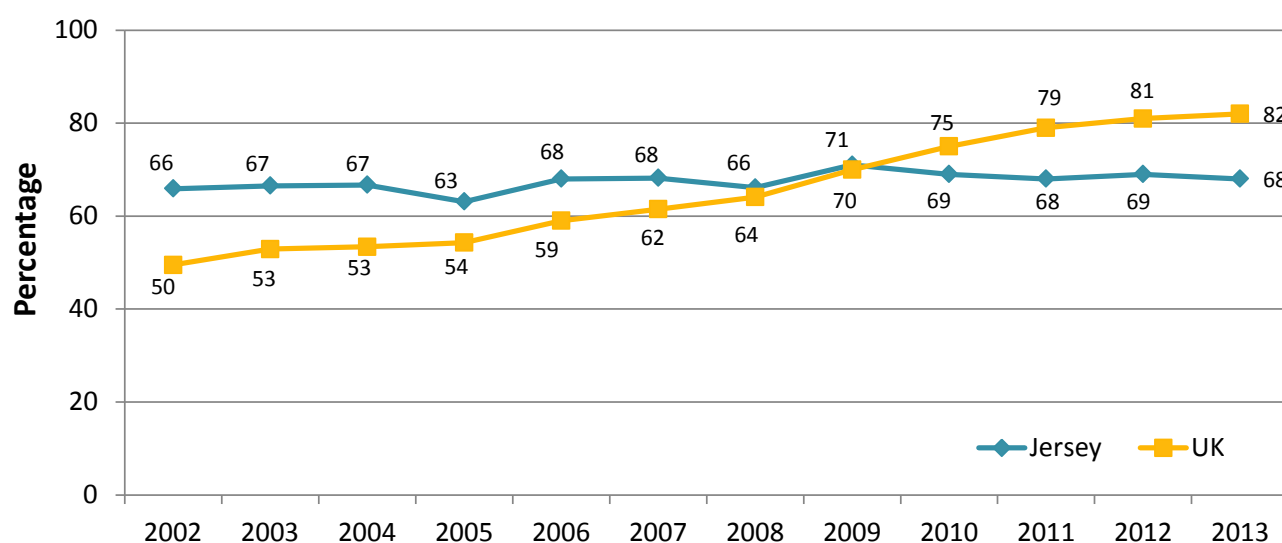


Data for the UK for 2012/13 not available at time of print.

Pass Rates

In 2013, 68% of all GCSE entries in Jersey achieved five or more grades A* to C, a similar proportion to the previous year (69%). In both these years, the proportion for Jersey was below that of the UK (81% in 2012 and 82% in 2013).

Figure 14.3 Proportion of Students Achieving 5 or More GCSE's Grades A* to C, 2002-2012



More than four-fifths (81%) of all A-level entries in Jersey in 2012 achieved grades A* to C compared with 77% in the UK.

Further Reading: Education Department Annual Reports.

15. Culture and Heritage

The Department for Education, Sport and Culture (ESC) funds four independent organisations (by direct grant) which provide core arts and heritage services for the Island. In addition, the department provides funding to L’Office du Jèrriais for the teaching of Jersey Studies and Jèrriais in schools, and the promotion of the language in the community; including classes for adults.

Table 15.1 Grants awarded to Cultural Organisations in 2013

	Grants (£)
Jersey Heritage*	2,323,607
Jersey Opera House**	444,983
Jersey Arts Trust	152,457
Jersey Arts Centre	431,677
Don Balleine (L’Office du Jèrriais)	140,356

*Does not include refurbishment fund of £465,000

**Does not include loan repayment of £572,000 in connection with the restoration of the Opera House

Source: Jersey Cultural Development Office, Education Sport and Culture

Jersey Heritage Trust

Established by the States of Jersey to care for, promote access to, and act as advocates for the Island’s public heritage resources, Jersey Heritage is responsible for a number of sites and services for the Island. Under agreements with the States and the Société Jersiaise, it administers sites including the Jersey Museum, Maritime Museum, the Jersey Archive, Elizabeth Castle, Mont Orgueil Castle, Hamptonne and La Hougue Bie.

In 2013 there were a total of 175,062 visits to sites administered by Jersey Heritage.

The Trust also runs the “Forts and Towers” programme which gives public access to a number of historic buildings for short-term hire (4,455 staying visitors in 2013). Other work includes providing advice to the Planning and Environment Department on the listing of historic buildings. The Trust also provides a grant to the Société Jersiaise to support public-facing aspects of its work including the Lord Coutanche Library.

Arts

ESC supports two arts venues: the Jersey Opera House and the Jersey Arts Centre, with auditoria seating 625 and 250 people, respectively. In addition, the Arts Centre stages some performances in other occasional venues in the Island and presents a programme of exhibitions in the Berni Gallery at the Arts Centre.

The Arts Centre sold 27,836 tickets for 241 performances and held 16 exhibitions in the Berni Gallery which included the 30th anniversary exhibition of the J.J. Fox Channel Island Art Competition.

The Jersey Opera House sold 52,579 tickets for 241 performances in 2013. It had 171 days of usage of the studio theatre, involving 2,903 people - ranging from JOH Children's Drama Classes to dance & theatre workshops with professional touring companies. In addition, there were 38 corporate bookings with 1,043 attendees.

The Jersey Arts Trust is the arts development and grant-giving body in Jersey. It ran eight arts development projects last year in which 660 people participated. In addition, it ran three arts development groups, with a total of 45 participants, and an advice and support service for artists. A total of £48,374 was awarded as grants (including underwriting which, though awarded, was not necessarily called upon). The Jersey Arts Trust also distributed £39,050 in arts grants in its capacity as a registered entity on behalf of the One Foundation.

Jèrriais

In 2012 delivery of the Jèrriais schools programme was re-organised to include an introductory Jersey Studies Course for Year Four, supplemented by additional after-school language teaching in four Jèrriais centres (or "Pallions").

Last year approximately 800 children (including classes from all States primary schools) received the introductory programme with 45 pupils studying in the Pallions. In addition, there were 26 students in classes for secondary students and 23 adult learners. The work of L'Office du Jèrriais also included: promotion of Jèrriais in the community; translation for States Departments, local businesses and voluntary organisations; participation in community activities including the Jersey Eisteddfod; and development of teaching resources.

Jersey Library

In 2013 the Jersey Library received a total of 440,178 visits, of which 367,078 were to the main Town Library and 64,100 were to the part-time branch in Les Quennevais School. The mobile library visits more than 30 sites each week, and received about 9,000 visits in 2013.

Library expenditure equated to about £16 per capita in 2013 and expenditure on books and materials was £2 per capita.

Table 15.2 Library Annual Statistics, 2013

	Number of Items issued	Items Added to Stock
Town Library	312,960	9,127
Branch Library	52,710	2,039
Mobile Library	12,050	366
Schools Resources	28,310	2,322
Nursing Homes / Housebound	16,730	N/A
Total	422,760	13,854

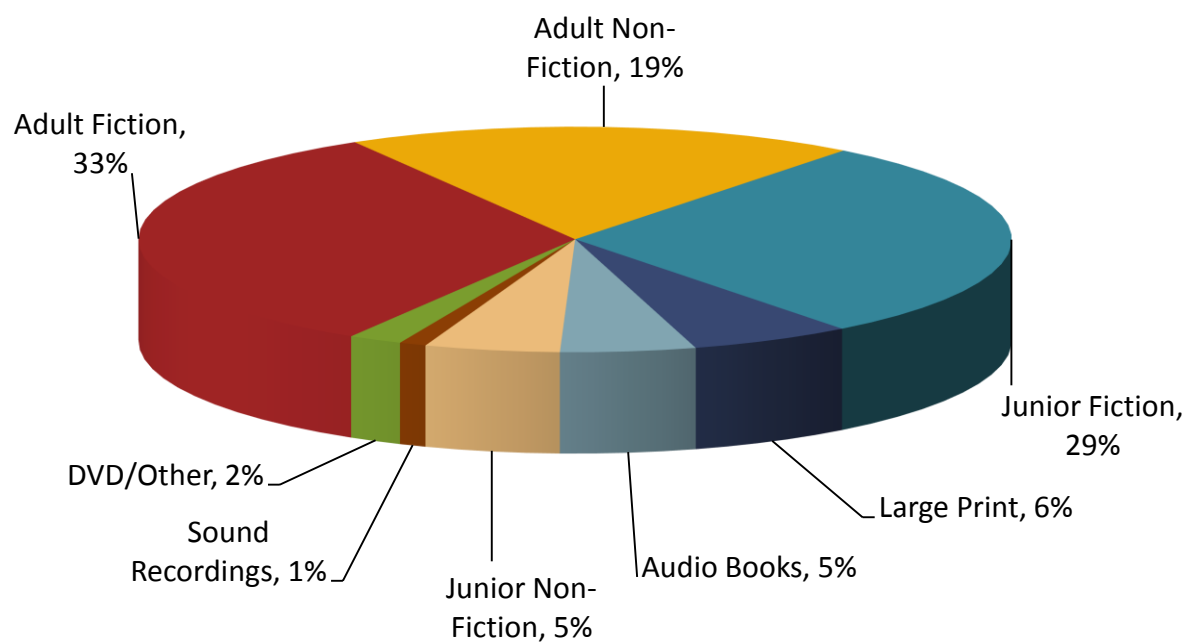
Numbers independently rounded to nearest 10

15. Culture and Heritage

Children’s fiction and non-fiction accounted for over a third (34%) of all items borrowed. Adult fiction (including large print and audio formats) accounted for 44%.

Throughout the year, there were 270 children’s activities and organised group visits to the library, attended by over 5,100 young people. A further 107 visits were made by library staff to schools and community groups to promote the library service, books and the joy of reading.

Figure 15.1 Loans by Category, 2013



In 2013 the library dealt with about 66,313 enquiries; 86% (56,713) at the Town Library and 14% (9,600) at the Branch Library.

Over 20,700 reference enquiries were answered; around 75% of these were for information of a local nature.

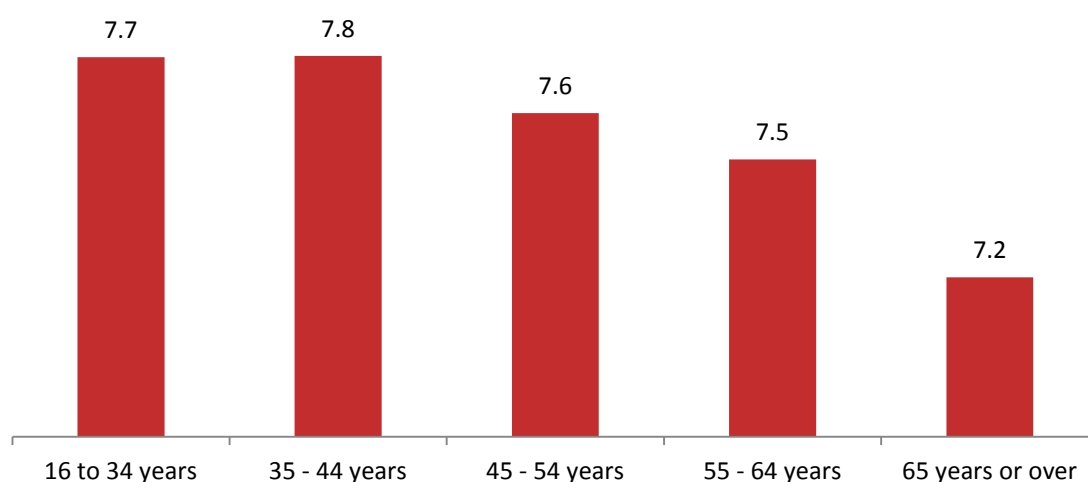
In the Autumn of 2013 a second learning centre opened with 11 computer terminals, providing access to European Computer Driving Licence (ECDL) and driving test theory training. Family History resources such as Ancestry, Findmypast and Forces War Records can also be searched in the learning centre.

16. Health

General Health Status

One way to determine the overall health of a population is by asking people to self-rate their health. The 2012 round of the Jersey Annual Social Survey recorded that around half (52%) of respondents reported their health to be 'excellent' or 'very good'. Fewer than one in twenty (3%) reported being in 'poor' general health. A more detailed question whereby respondents rate their health on a scale of one to ten (ten being the best imaginable health and one being the worst) was also included in JASS 2012, see Figure 16.1.

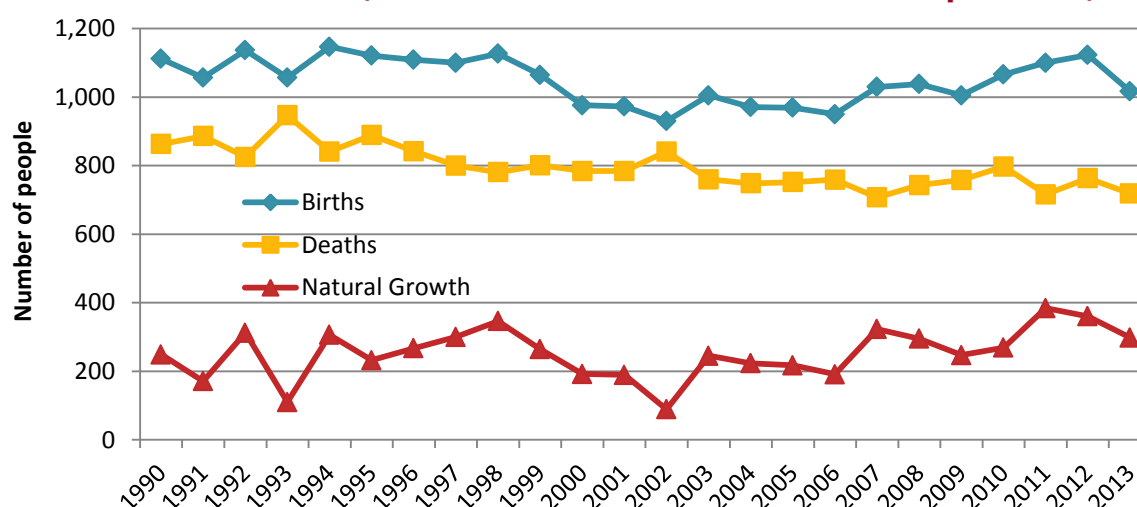
Figure 16.1 On a scale of one to ten, where ten is the best imaginable and one is the worst, how good or bad is your own health today? Mean rating by age



Births and Deaths

In 2013, 1,017 live births and 719 deaths were registered in Jersey, a net natural growth of 298*.

Figure 16.2 Number of Births, Deaths and Natural Growth in Population, 1990-2013



Source: States of Jersey Superintendent Registrar.

* Provisional data for 2013

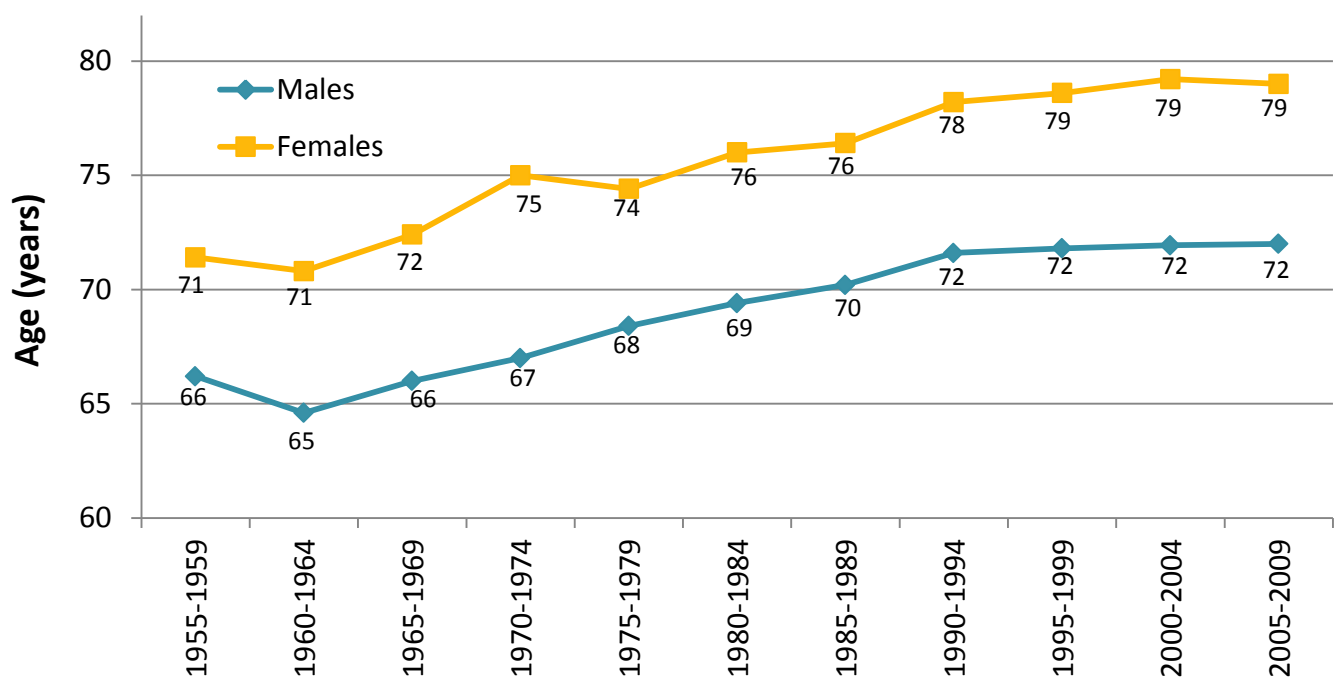
Teenage Pregnancy

The rate of under 18 (teenage) conceptions in Jersey over the period 2010-2012 was 11.4 per 1,000 15-17 year olds (based on 54 conceptions). This rate is significantly lower than the England average of 30.9 per 1,000 over the same period. More than two-thirds (70%) of teenage conceptions in Jersey ended in a termination.

Average Age at Death

The mean average age at death in Jersey has been increasing for both males and females over the past 50 years. The average age at death for women is now about seven years higher than for men.

Figure 16.3 Average Age at Death, 1955-2009



In 2012, the average age of women dying was 81, whilst that for men was 73.

Main Causes of Death

In 2012, cancer was the main cause of death, responsible for around one in three (32%) of all deaths. Circulatory diseases, which include Ischemic heart disease and stroke, accounted for another 28% of deaths. Respiratory diseases, such as influenza, pneumonia and chronic lower respiratory disease, were the underlying causes of one in nine (11%) of deaths.

Life Expectancy at birth

Life expectancy at birth in 2012 was 79 for males and 84 for females.

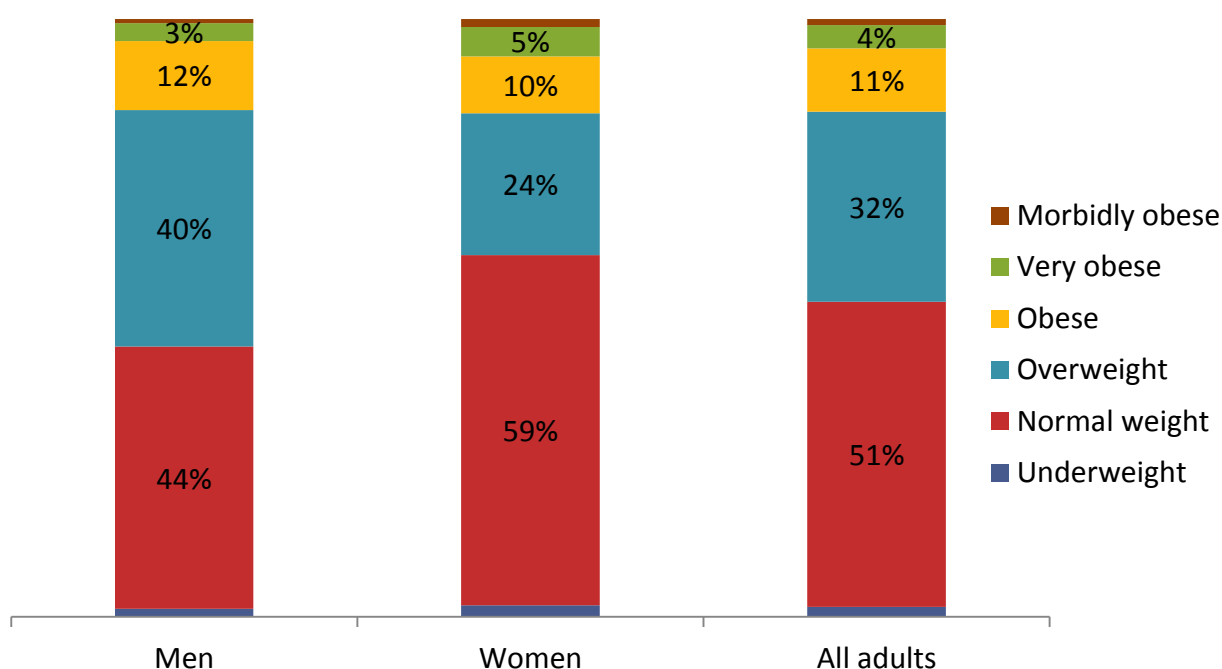
Primary Care

As at 31st December 2013 there were 15 GP practices in Jersey, with a number of satellite surgeries, and 103 practicing GPs (up from 100 practicing GPs in January 2013).

Obesity

Using calculated Body Mass Index (BMI) values, Figure 16.4 shows that around a third (32%) of adults would be classified as 'overweight', whilst an additional one in ten (11%) would be classified as 'obese', and one in twenty (5%) 'very' or 'morbidly' obese.

Figure 16.4 Distribution of BMI category by gender



Diet

JASS 2013 asked how many portions of fruit and vegetables respondents had eaten in the previous 24 hours. It found that almost two-thirds (64%) of adults in Jersey eat less than the recommended daily amount of five portions.

Physical Exercise

The recommended level of physical activity for adults is to engage in at least five sessions of moderate intensity activity for at least 30 minutes per week. JASS 2013 found that half (51%) of adults reported an activity level which met or exceeded this recommendation.

Smoking

In Jersey, around one in six (16%) adults smokes daily, whilst more than two-fifths (44%) have never smoked.

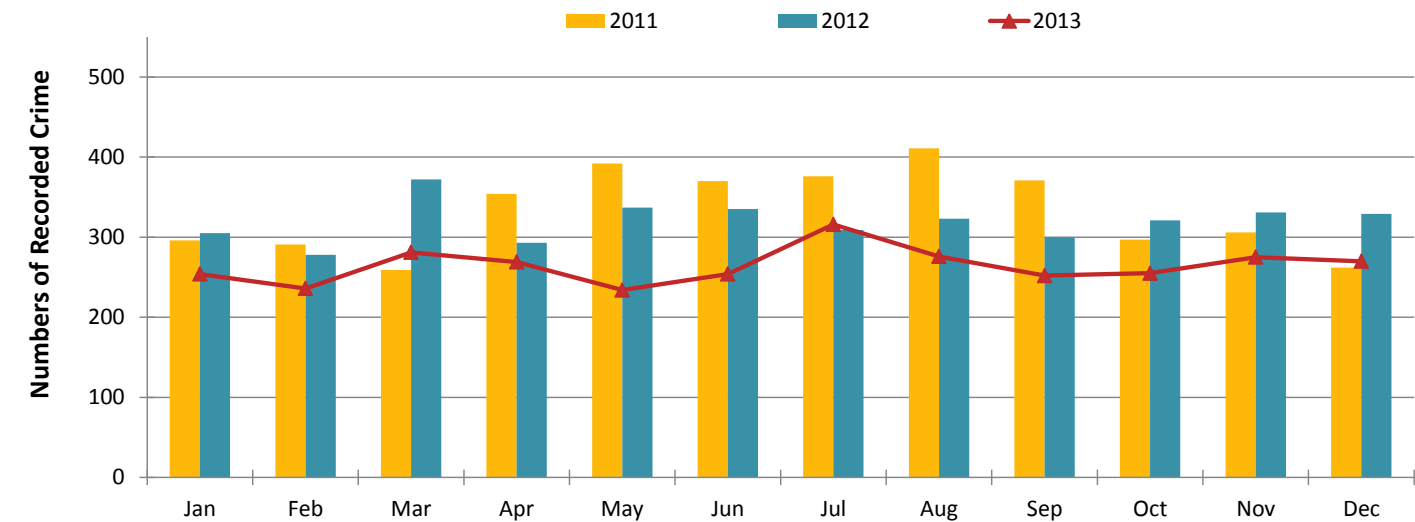
Further reading: Jersey Annual Social Survey 2013; Health Profile for Jersey 2014

17. Crime

Levels of Recorded Crime (Source: States of Jersey Police)

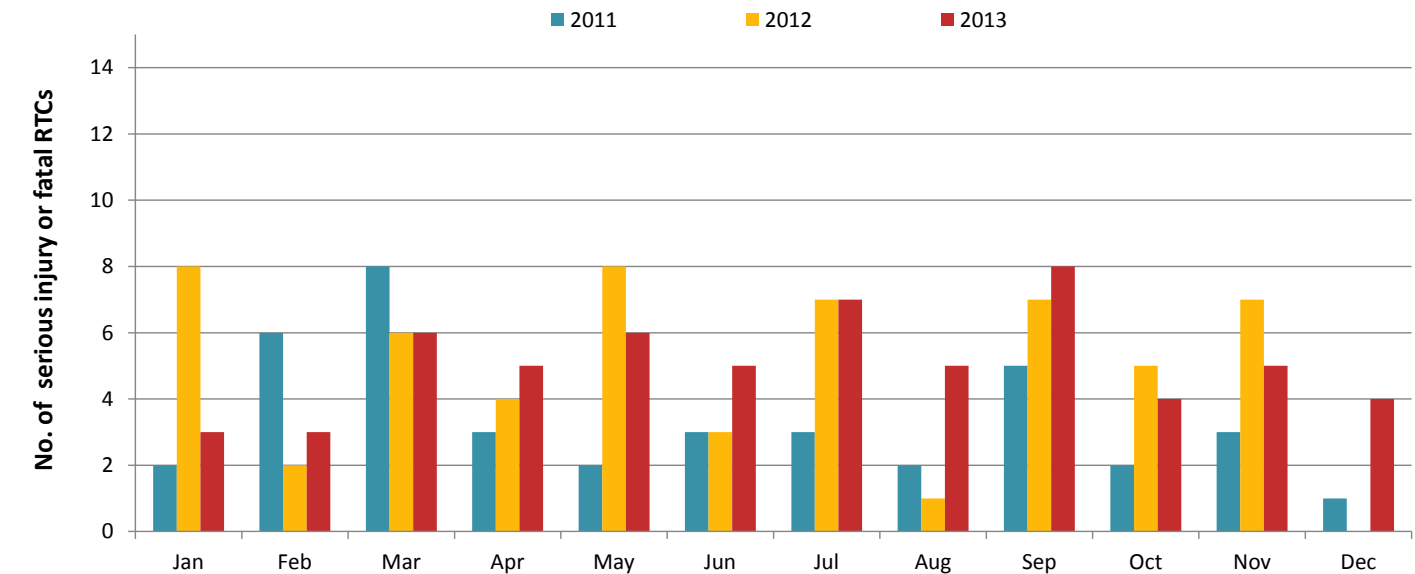
There were 3,172 crimes recorded in 2013, representing 32 crimes per 1,000 members of the population. The number of recorded crimes was a sixth (17%) lower than the number recorded in 2012. Almost two-thirds (64%) of crime took place in St Helier, with fewer than two crimes a week being recorded in eight of the Island’s twelve parishes. More than a third (35%) of recorded crime resulted in offenders being charged for court appearance or reported to parish hall enquiries.

Figure 17.1 Recorded Crime in Jersey 2011-2013



In 2013, there were 61 serious or fatal Road Traffic Collisions (RTCs). Three-quarters of the injuries received were fractures; 11 people sustained very serious or fatal injuries (see Figure 17.2).

Figure 17.2 Number of Serious Injury or Fatal RTCs in Jersey 2011-2013



Source: States of Jersey Police Service.

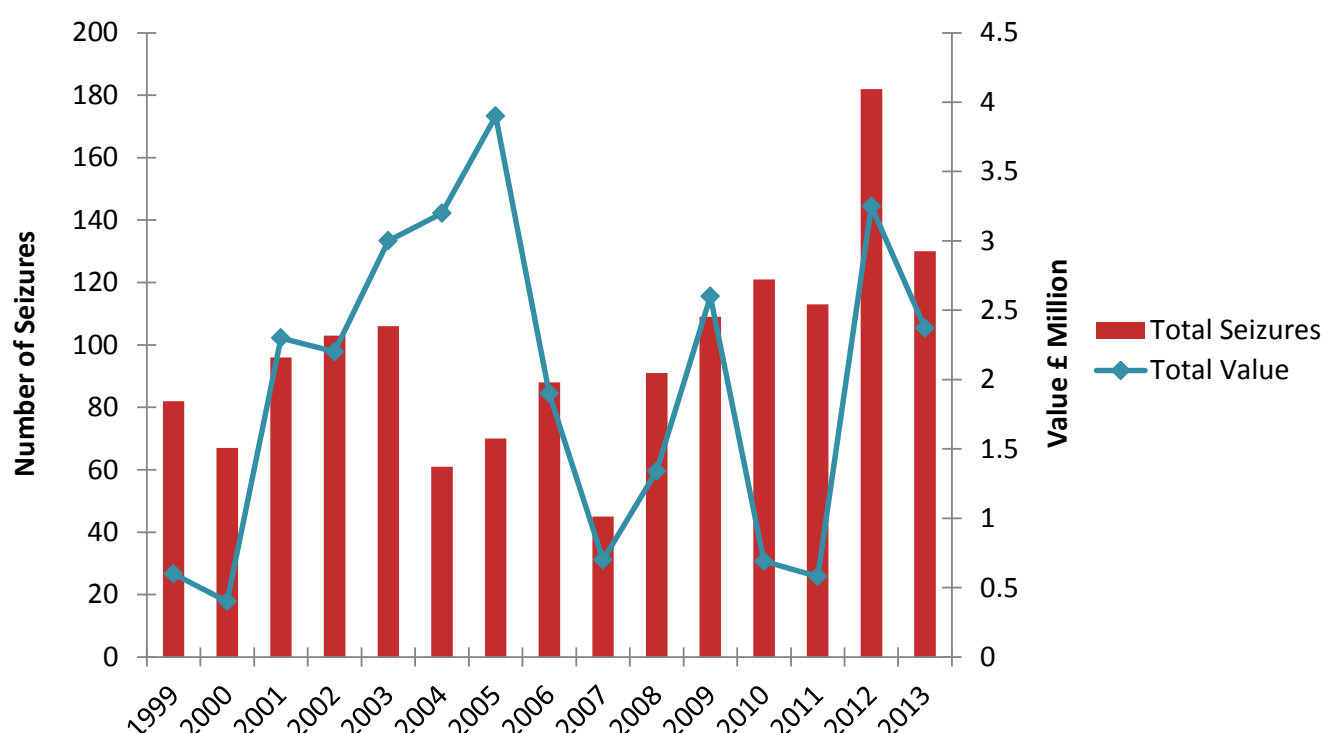
Drugs

In 2013 the Customs and Immigration Service was responsible for 130 drug seizures with an estimated total street value of almost £2.4 million.

Table 17.1 Volume of Drugs Seizures by Customs and Immigration, 2009-2013

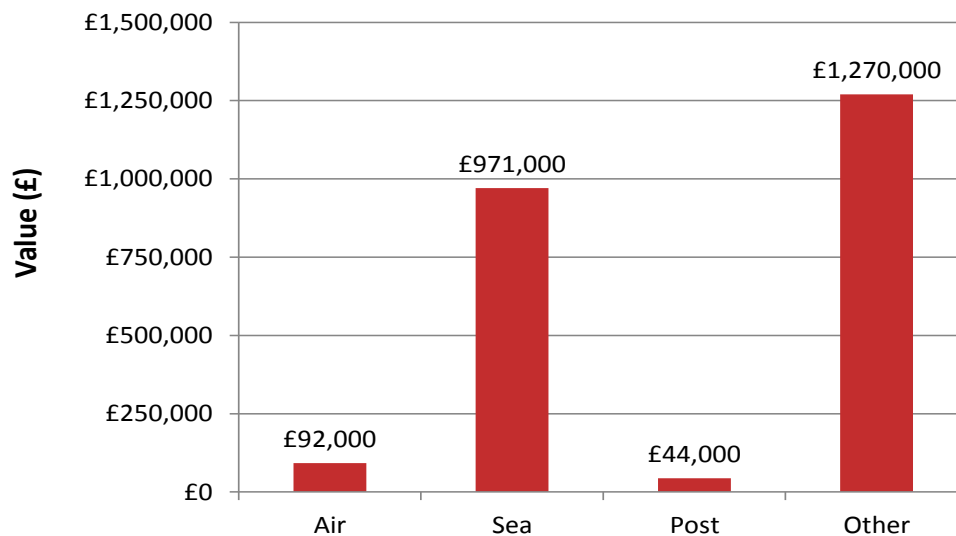
	2009	2010	2011	2012	2013
Heroin (grams)	1,242	572	433	84	75
Ecstasy (tablets)	-	-	-	1	-
Cocaine (grams)	2,788	504	103	17	405
Cannabis (kgs)	114	3	12	238	140
Mephedrone (grams)	-	1,080	467	1,145	244
Mephedrone (tablets)	-	6	1	-	-
Amphetamines (grams)	1,002	-	174	-	477
Amphetamines (tablets)	5,199	-	-	-	-
LSD (grams)	-	5	-	-	-
Class C (grams of powder)	1,005	47	6	291	-
Class C (tablets)	72,049	3,419	586	7,233	1,001

Figure 17.3 Seizures by the Customs and Immigration Service, including Joint Operations: Annual number and Estimated Total Street Value, 1999-2013



Data for 2001 onwards includes joint operations between Jersey Customs, Guernsey Border Agency, Jersey and UK police and French Customs.

Joint operations, initiated by Jersey but made by UK and French authorities, have resulted in a number of drug seizures being made outside of the Island, as shown in Figure 17.4.

Figure 17.4 Value of drug seizures by arrival location, 2013

Further reading: Customs and Immigration Service, Annual Reports.

Prison

The prison population in Jersey increased from 2003 to 2011, with 2011 seeing an average of 185 prisoners. However, the average prison population has since decreased to 159 in 2013. During 2013, the maximum number of prisoners held was 169, similar to the maximum seen in 2012.

2006 saw the highest number of temporary releases. There has since been a gradual decline, with 2013 having about a third of temporary releases seen in 2006.

Table 17.2 Prison Population and Number of Temporary Releases, 2003-2013

Year	Population			No. of Temporary releases	Work Experience	%	Breaches	%
	Min	Max	Average					
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
2006	157	189	174	7,764	3,586	46	18	0.2
2007	172	200	184	6,116	4,098	67	17	0.2
2008	171	192	181	5,203	4,469	86	22	0.4
2009	166	199	184	5,361	2,559	48	26	0.4
2010	162	199	177	4,891	2,679	55	10	0.2
2011	163	200	185	5,302	2,766	52	17	0.3
2012	142	170	157	3,475	1,866	53	8	0.2
2013	148	169	159	2,714	1,580	58	2	0.05

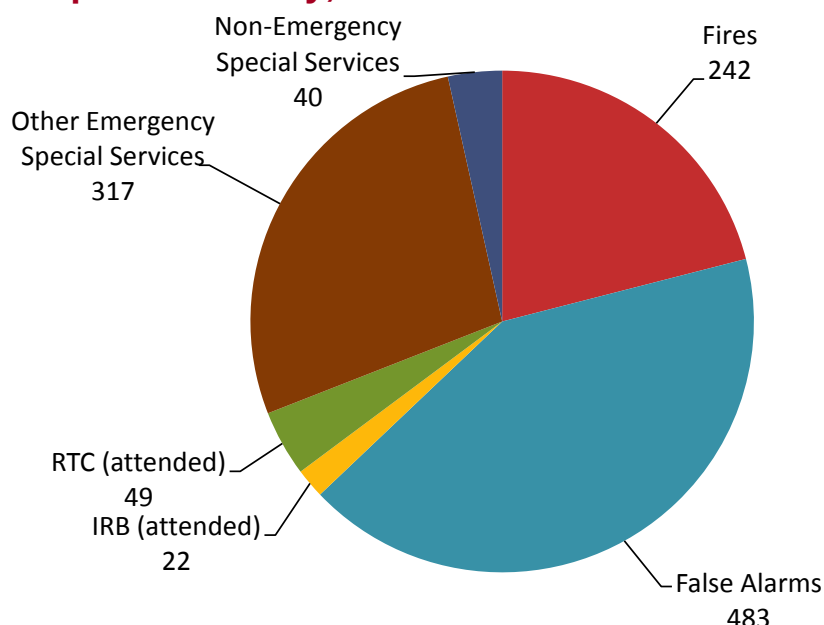
2013 also recorded the lowest number of work experience releases and breaches for at least 10 years.

Source: States of Jersey Prison Service.

18. Fire Service

2013 saw an increase in the number of fire and emergency special services compared with 2012. The Service responded to fewer Road Traffic Collisions (RTC) and false alarms; however, activity levels were up in every other area.

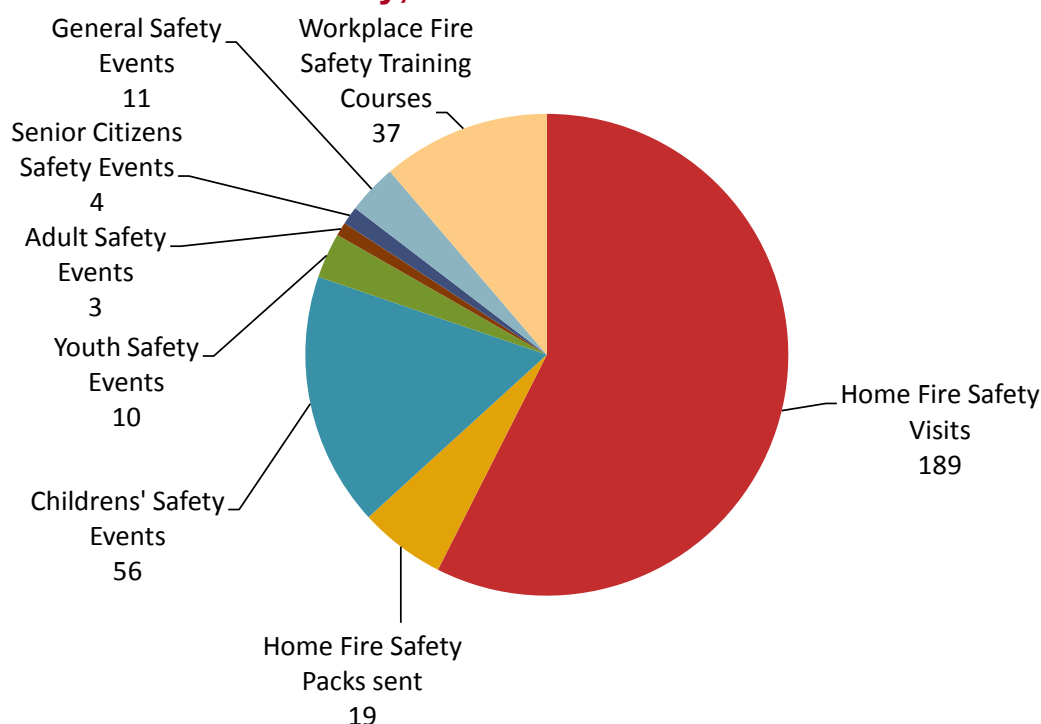
Figure 18.1 Response Activity, 2013



* *Special services are those emergencies which are not fires i.e. Hazardous Material incidents, Height rescues, Emergency Effect Entry and Industrial accidents.*

The total number of emergency responses in 2012 was 1,153.

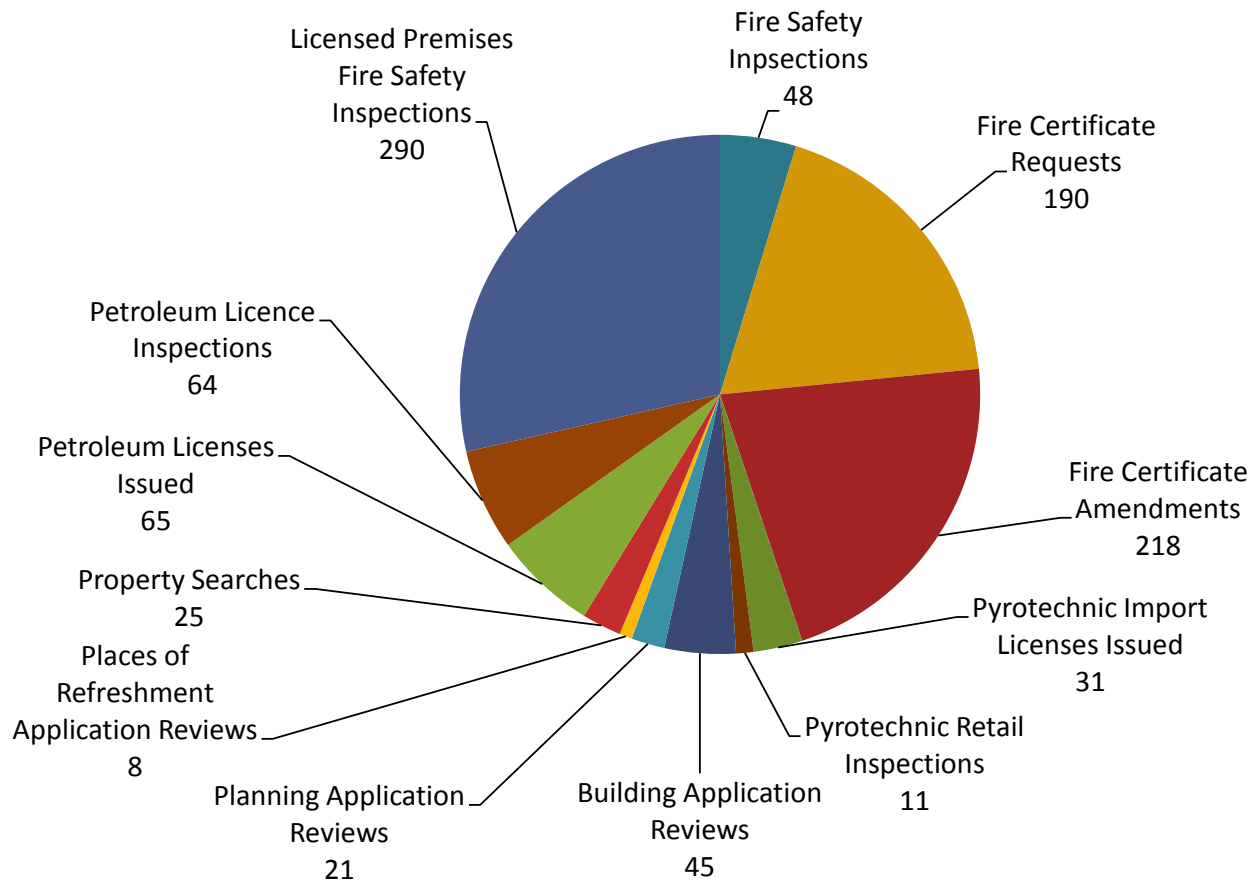
Figure 18.2 Prevention Activity, 2013



18. Fire Service

The Service’s small Prevention team aims to bring about lower levels of fire and associated harm and loss through helping people to understand and manage risk. The majority of information is delivered through media channels. The activity represented in Figure 18.2 is the delivery of information on a face to face basis.

Figure 18.3 Protection Activity, 2013



The Service’s Protection team enforce fire safety and petroleum laws and regulations on behalf of the Minister for Home Affairs. In addition to this they provide enforcement support and technical advice on licencing, pyrotechnics and planning and building matters.

Source: States of Jersey Fire and Rescue Service

19. Ambulance Service

The Ambulance Service has seven emergency ambulances, three single response cars, two major incident vehicles and one 4WD with major incident trailer. In addition to the emergency response vehicles, the Service also operates a Patient Transport Service (PTS), which has 12 mini-buses and 4 hospital car service vehicles. Between the hours of 7 a.m. and 10 p.m. three ambulances are available and between 10 p.m. and 7 a.m. there are two.

Calls

The Jersey Ambulance Service received 8,087 emergency calls in 2013, an increase of 782 calls from 2012 (7,305 calls), representing an average of 22 emergency calls per day.

Table 19.1 Ambulance Service Call Statistics, 2009 - 2013

	2009	2010	2011	2012	2013
Total Calls received by Combined Control Centre	9,753	9,512	9,834	10,398	10,794
Total Emergency Calls Received	6,996	6,809	6,984	7,305	8,087
Total Emergency Calls responded to	6,597	6,341	6,931	6,938	7,578
Category A	1,341	1,126	989	1,414	1,649
Category B	4,395	4,786	5,089	5,185	5,533
Category C	848	429	469	329	396
Total Urgent Calls responded to	1,258	1,232	1,221	1,294	1,162
Total Routine Calls responded to	1,240	1,228	1,343	1,443	1,420
Total Charter Flights taken	231	287	338	319	282
PTS Patient Journeys	49,733	48,631	49,145	47,890	46,346

Emergency Calls refers to all 999 calls.

Category A: Life-threatening situations; **Category B:** Serious/Urgent and **Category C:** Non-urgent situations.

Urgent Calls come from GPs (not 999) and totalled 1,162 in 2013, an average of about 3 per day. Routine Calls are for transfer of patients and were at a similar rate of 1,420 calls in 2013.

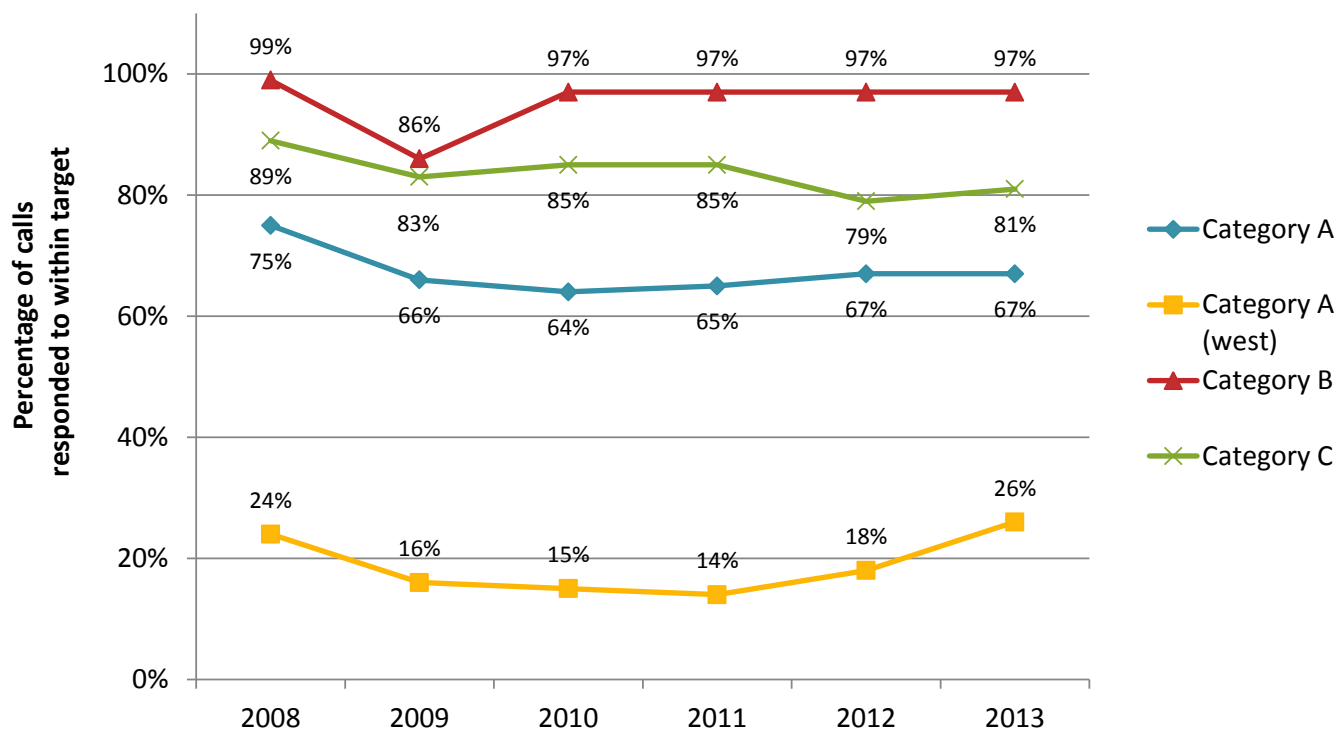
Response Rates

It is the aim of the Ambulance Service to respond to all Category A calls within 8 minutes, which can often be difficult in the outlying areas of the Island. The target for Category B and C is to be reached within 19 minutes.

19. Ambulance Service

2013 saw largely the same rates of targets reached as in 2012. Life-threatening situations (Category A) were reached within the 8 minute target 67% of the time. The response rate for Category A in the West of the Island was 26% in 2013, compared to 18% in 2012. Category B and C achieved similar rates in 2013 as in 2012, 97% and 81% for Category B and C in 2013.

Figure 19.1 Percentage of Calls Responded to within Target, 2008 - 2013



Care Rating (Source: JASS 2010)

Almost two-thirds (63%) of people who had received care from the Ambulance Service (including PTS) in the previous twelve months rated the care as “Excellent”; a further quarter (28%) rated it “Very good”.

Community Alarms

The elderly and infirm living at home in Jersey can be supplied with a Community Alarm System to which the Ambulance Service respond when activated if it is a genuine emergency (otherwise key holders are contacted to attend as a first response). In 2013, the ambulance responded to 376 such alarms; neighbours/contacts were notified in another 69 cases and GPs were called in 26 cases. The total number of alarm activations in 2013 was 3,872.

Automated External Defibrillators

In 2013 there were a total of 130 defibrillators in the community.

20. Coastguard

Jersey Coastguard provides the response, initiation, co-ordination and international management service for maritime and aviation Search and Rescue (SAR) within Jersey's territorial waters. This service is obligatory under the IMO's 1979 International Convention on Maritime Search and Rescue, to which Jersey is a signatory, through the UK. The team also coordinates pilotage and shipping movements for the Ports of Jersey, runs the VTS (Vessel Traffic Services) for the ports and undertakes operational liaison with the Shipping Companies which serve Jersey. The Coastguard manages the counter pollution and salvage response for the Island under the Shipping (Jersey) Law 2002 and maintains the voyage safety reporting service for all vessels on passage in territorial waters, with 4,309 reports being received and processed in 2013. The Coastguard also assists the Fire and Rescue Service, Ambulance Service and Police to respond to incidents where persons are at risk of injury or death on the Island's cliffs or the shoreline.

Search and Rescue Incidents (SAR)

In 2013 there were a total of 159 incidents that required the use of Coastguard SAR Service (see Table 20.1). The service assisted a total of 163 people during the year, and saved a further 30 from imminent danger. 24 "alarms with good intent" were raised by members of the public to a potential problem at sea; each of these were investigated either from ashore or by an SAR unit. There were 64 vessels that needed assistance during 2013 and a further 8 needed saving from imminent danger. The most common reasons for incidents occurring at sea were mechanical/cooling failure or due to fuel or oil problems.

During the year, close cooperation with the States of Jersey Police resulted in 17 coast line searches being carried out for missing persons, including the use of the Channel Islands Air Search (CIAS) aircraft. Major incidents that the Maritime Rescue Coordination Centre (MRCC) coordinated included a light aircraft crash in fog off St Ouen's Bay on 4th September 2013 and the rescue of 2 missing fishermen at the Écréhous during a gale on 3rd November 2013. During the latter the CIAS search aircraft made a crash landing on the north coast cliffs in St John.

Coastguard Vessels

As well as helping with SAR operations and assisting the other emergency services, the fleet also operates a 24 hour pilot boat service to assist vessels to safely dock in port and to clear local reefs and navigational dangers. The fleet, including the *Duke of Normandy*, also conducts maintenance and inspection of aids to navigation (lighthouses, buoys and beacons), harbour and offshore reef structures. Additionally, if required, the fleet also carries out salvage operations, oil pollution response, offshore towage and other contract work in the Channel Islands area.

Beach Lifeguard Service

The seasonal Beach Lifeguard Service is run by the RNLI. The RNLI works closely with Jersey Coastguard and provides 10:00-18:00 cover for four beaches from May to the end of September each year.

Table 20.1 Jersey Coastguard Sea Rescue Statistics, 2003 - 2013

	Total Incidents	Deployment / Launches of main Rescue units (SRUs)							
	MRCC* Jersey	St Helier ALB / ILB***	St Catherine ILB	Fire Service IRBs	CI Air Search	Other Vessels	Duke of Normandy & States Vessels	Helicopters	Alarms with good intent
2003	173	27	22	49	1	56	11	0	36
2004	129**	22	23	30	2	34	14	1	24
2005	102	14 / 11	14	20	3	30	5	0	27
2006	99	15 / 15	10	17	9	32	15	2	33
2007	119	17 / 18	21	17	7	46	17	5	21
2008	133	30 / 25	14	26	4	26	21	3	42
2009	175	45 / 27	17	35	9	52	21	4	59
2010	148	32 / 19	18	23	1	40	23	1	34
2011	160	31 / 19	22	24	7	59	22	3	36
2012	174	46 / 17	28	19	11	78	29	5	48
2013	159	34 / 23	23	37	5	63	21	3	24

* MRCC: Maritime Rescue Coordination Centre

** change in recording data due to the Jersey coast radio station moving from Corbière to Maritime House.

*** ALB = All Weather Lifeboat, ILB= Inshore Lifeboat

Further Reading: Jersey Coastguard www.portofjersey.je

21. Social Security

Social Security Fund

The Social Security scheme is the means by which workers insure themselves, through the payment of contributions, for periods when they are unable to work through ill-health, maternity or retirement.

For low to medium wage earners, Supplementation is used to top-up the contributions to ensure a full pension and full insurance if unable to work.

In 2012, expenditure on benefits from the Social Security Fund totalled £191 million. Income from Contributions and States Grant totalled £219 million.

Over 28,000 people received an Old Age Pension in 2012, whilst almost 1,000 mothers claimed a Maternity Allowance.

Table 21.1 Number of individuals claiming benefit on 31 December 2012

Type of Benefit	Number of beneficiaries
Pensions	28,132
Survivor's Benefit	928
Invalidity Benefit	859
Long-Term Incapacity Allowance	3,670

The above benefits are normally paid for relatively long periods of time. Other benefits, shown in Table 21.2, are paid for shorter periods.

Table 21.2 Number of Claims submitted during 2012

Type of Benefit	Number of Claims Submitted
Death Grant	514
Maternity Allowance	982
Short-Term Incapacity Allowance	27,260

Health Insurance Fund

The Health Insurance Fund subsidises GP visits and prescriptions for most Jersey residents (the "Health Scheme"). A total of £26.7 million was spent on benefits from the Health Fund in 2012.

21. Social Security

Tax Funded Benefits

Income Support provides financial assistance towards the cost of housing, living, medical needs and childcare.

On the 31st December 2012 there were 6,636 Income Support claims being paid.

There are several other tax funded benefits including Christmas Bonus benefit, TV Licence Benefit and the Jersey 65+ Health Scheme. In 2012 more than 18,000 people each received a Christmas Bonus payment.

Table 21.3 Summary of Expenditure on Tax Funded Social Benefits

Social Benefit	2012 Expenditure £m
Income Support (excluding Special Payments)	89.1
Income Support Special Payments	2.1

Cold Weather Payments totalled £560,000 of Special Payments shown above.

Table 21.4 below shows the number of adults and children by household type for Income Support claims.

Table 21.4 Household types - Income Support claims on 31 December 2012

Household type	No. of claims	Total No. of adults	Total No. of children
65+	1,723	2,092	17
Adult/s without children	2,899	3,370	-
Adult/s with child/ren	1,009	2,110	1,810
Single adult with child/ren	1,005	1,005	1,504
Total	6,636	8,577	3,331

Health and Safety Inspectorate

The Health and Safety Inspectorate is the regulatory authority of health and safety at work in the Island. In 2012, the number of work related accidents and incidents reported through claims made for social security benefit reduced by 98 to 778, but the number of working days lost increased by 1,087 to 19,932. A total of £526,453 was paid out in Short-Term Incapacity Allowance as a result of these claims.

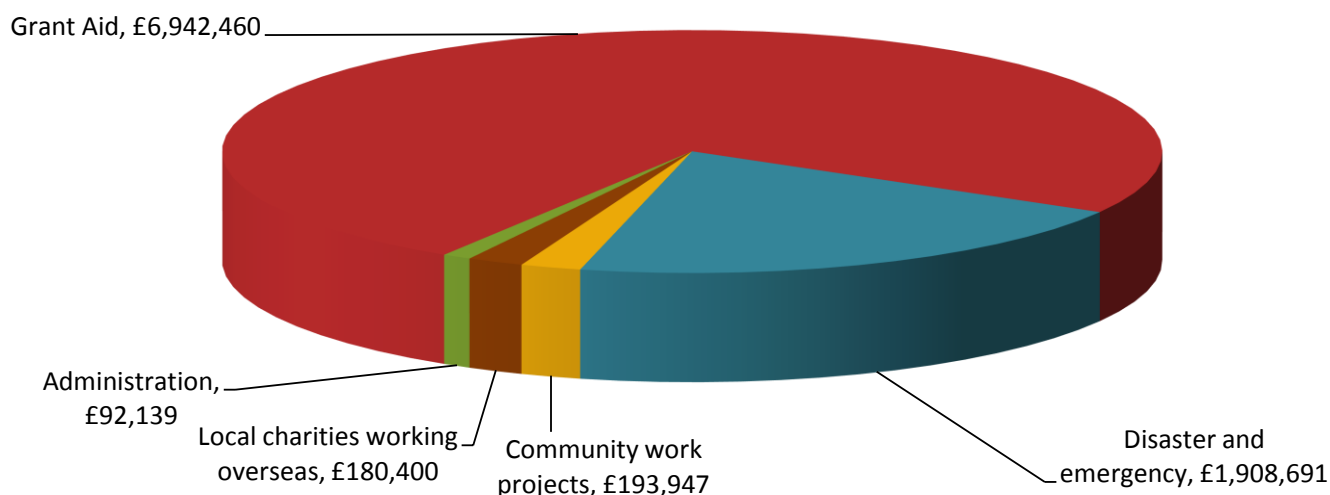
The Inspectorate carried out 102 investigations into serious accidents and incidents and 153 proactive inspections of high risk workplaces during the year. In 2012, 9 companies were prosecuted in the Royal Court for health and safety offences arising from serious accidents and asbestos disturbances.

22. Overseas Aid

Annual Expenditure

In 2013, the official contribution of overseas aid from Jersey was £9.3 million, of which more than £6.9 million was grant aid and £1.9 million was disaster and emergency aid. The official aid contribution from Jersey in 2013 was 5% more than the £8.8 million in 2012.

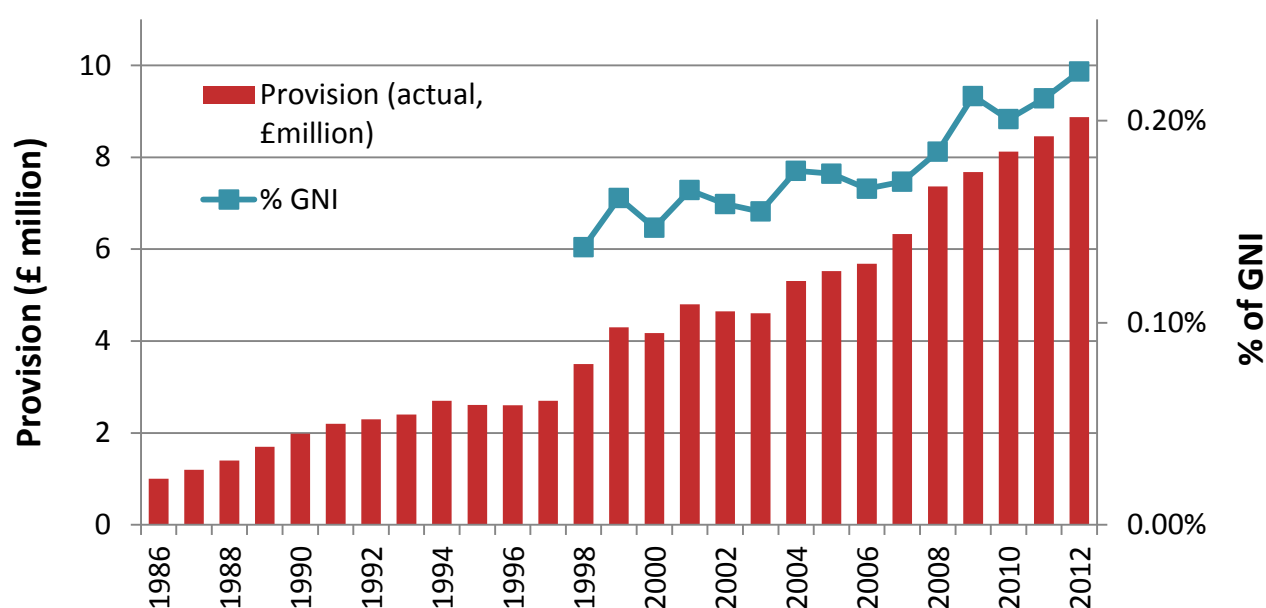
Figure 22.1 Official Aid Contribution from Jersey, 2013



Total Contribution: £9,317,637. Further reading: Overseas Aid Committee Annual Reports.

In 2012, Jersey's Overseas Aid expenditure was 0.2% of total Gross National Income (GNI).

Figure 22.2 Jersey Annual Overseas Aid Provision, Total and percentage of GNI, 1986-2012

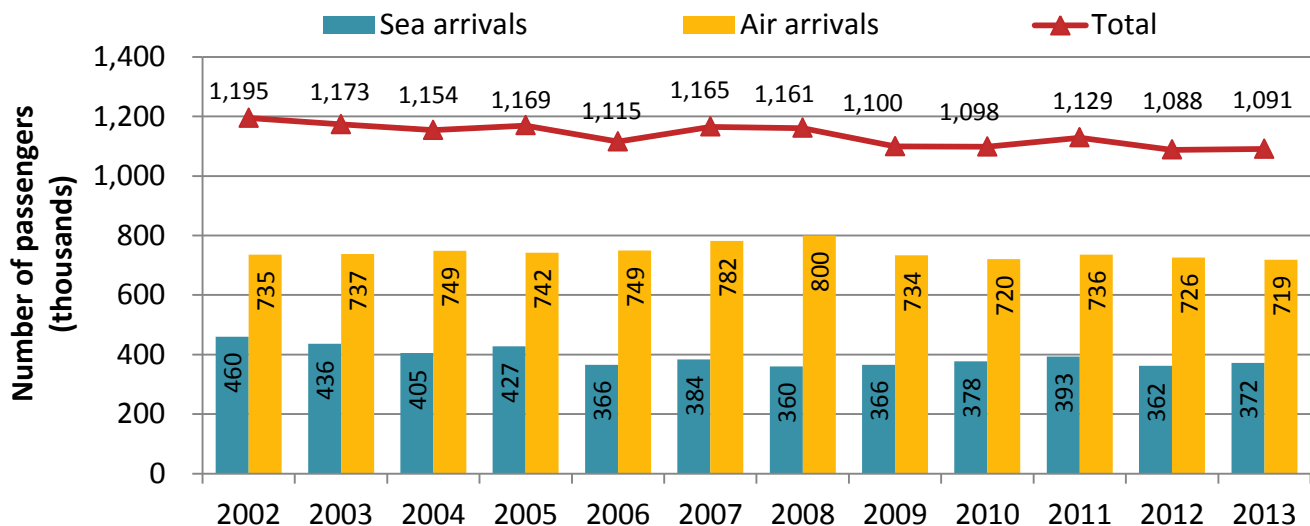


23. Sea and Air Transport

Total Number of Passengers, by Route

The total number of passenger (air and sea) arrivals in 2013 was around 1,091,000, some 3,000 more than in 2012, an increase of 0.3%. Sea arrivals were up by 2.8%, while air arrivals were down by 1.0% compared to 2012.

Figure 23.1 Total Number of Sea and Air Passenger Arrivals, 2002-2013



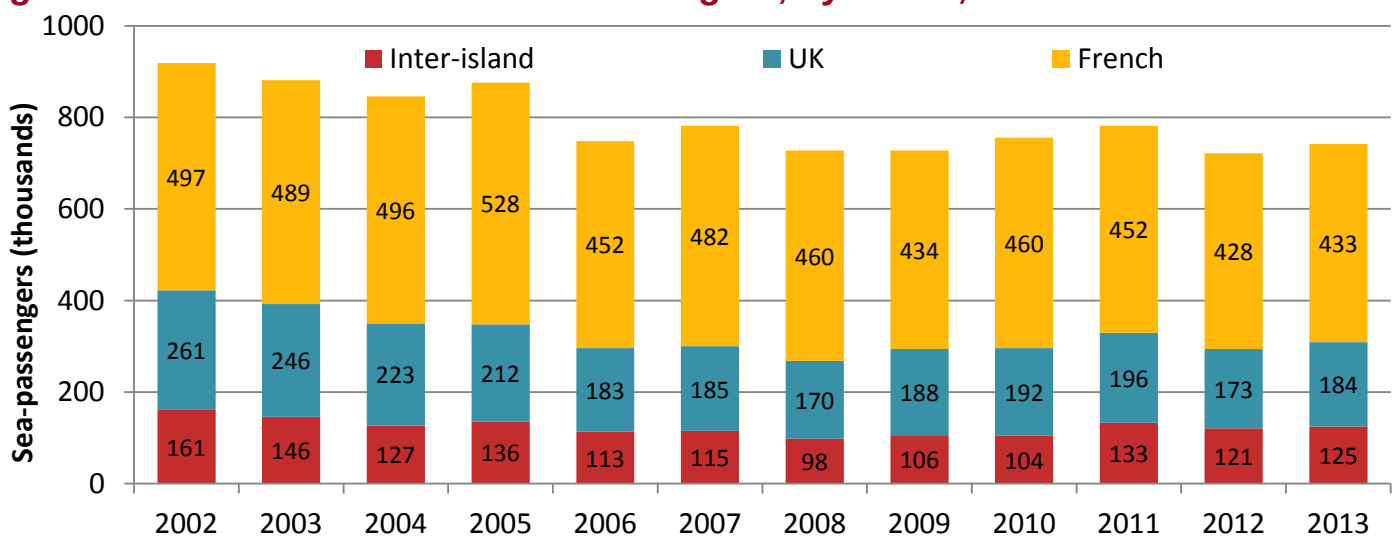
Numbers are in thousands of arrivals only. Passengers by air exclude transit passengers.

Source: Jersey Tourism Annual Report 2013, www.jersey.com/statistics

Sea Transport

In 2013, the total number of sea passengers (arrivals and departures) for all routes was over 741,000, around 18,000 more than in 2012. Cruise ship passengers are also included in Figure 23.2 – there were approximately 2,600 such passengers in 2013.

Figure 23.2 Total Number of Sea Passengers, by Route, 2002-2013



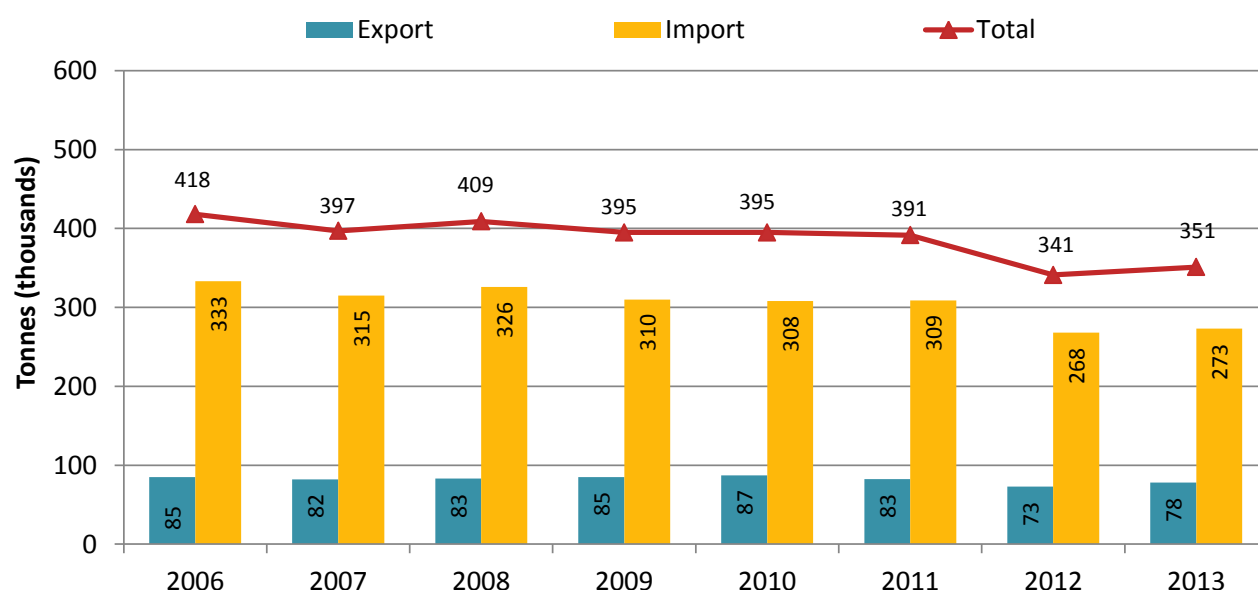
Source: Jersey Harbours Department.

Notes: Breakdown figures for 2002 and 2003 are considered less accurate than 2004 onwards, although the total number of passengers are regarded as reliable. The passenger figures shown are for regular scheduled routes in and out of the Island.

Sea Freight

More than 351,000 tonnes of freight were shipped (exports and imports combined) through St Helier harbour in 2013.

Figure 23.3 Annual Sea Freight, 2006-2013



Source: Jersey Harbours Department.

Table 23.1 Freight by Commodity (Import and Export), 2012 & 2013, tonnes

	2012	2013
Aggregate	175	195
Cement	14,723	18,840
Containerised Freight	308,125	319,013
Fertiliser	-	2,668
General Freight	1,524	3,397
Scrap	8,259	1,752
Timber	291	350
Trade Vehicles	6,777	5,001
Other	1,842	12
Total	341,716	351,228
Lift on, Lift off Freight (Lo Lo)	87,127	93,668
Roll on, Roll off Freight (Ro Ro)	254,589	257,560

Source: Jersey Harbours Department.

Along with freight, Jersey harbour saw 119,168 tonnes of fuel pass through the port; a quarter (25%) was diesel and around a fifth (18%) was petrol. Heavy fuel oil and aviation fuel each accounted for 19%. The remainder was comprised of kerosene (6%), light fuel oil (4%), butane (3%), propane (3%) and avtur (0.1%).

Further Reading: Jersey Harbours Department, Annual Report.

23. Sea and Air Transport

Airport Traffic

The total number of air passenger arrivals in 2013 was 718,993, a decrease of 1% on 2012.

Total UK passenger arrivals decreased by 1.7% on the previous year, while Channel Island arrivals decreased by 1.4%. International arrivals were up 11.9%.

Table 23.2 Passenger Arrivals 2012 and 2013

Point of Origin	2012	2013
UK Passengers	619,229	608,719
Inter-Island Passengers	70,612	69,642
International Passengers	36,318	40,632
Total Passengers	726,159	718,993

Source: www.jersey.com/marketinginfo

24. Vehicle Transport

Number of Vehicles

The number of vehicles recorded on the Driver and Vehicle Standards (DVS) register surpassed 100,000 for the first time in 2005 and stood at 120,671 on 31st December 2013.

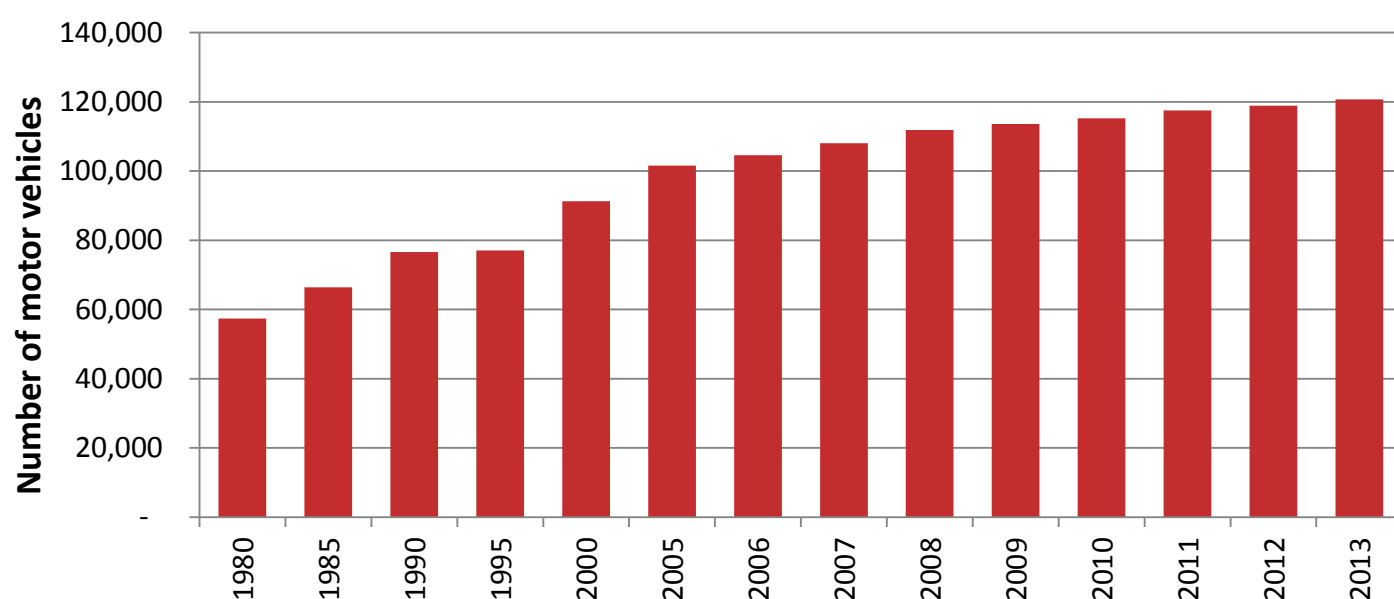
The 2013 figure represents a net increase of 1,800 vehicles on 2012. The increase comprises the difference between new registrations (6,504), scrapped (2,606) and exported (2,098) vehicles.

Many vehicles may lie unused or have been disposed of without informing DVS. Such vehicle records remain on the register, resulting in a higher number of registered vehicles than actual vehicles on Jersey's roads.

In 2013, 56 hybrid vehicles were registered; a similar number to that registered in 2012 (59). 20 electric vehicles were registered, fewer than half of those registered in 2012 (47).

As recorded by the 2011 Census, the average number of cars/vans per private households was 1.50. This number was at a similar level to that recorded in 2001 (1.48) and higher than that for the UK¹² (1.2). The average number of motorcycles/scooters per household increased from 0.12 to 0.19 per household between 2001 and 2011.

Figure 24.1 Total Number of Vehicles Registered in Jersey, 1980-2013



Figures include all cars, tractors, motorbikes etc, and commercial and private vehicles. Figures up to 1993 include only taxed vehicles; figures from 1994 onwards include all vehicles recorded on the DVS register as at 31 December of each year.

¹² Derived from data published in the General Lifestyle Survey 2010; Office for National Statistics.

24. Vehicle Transport

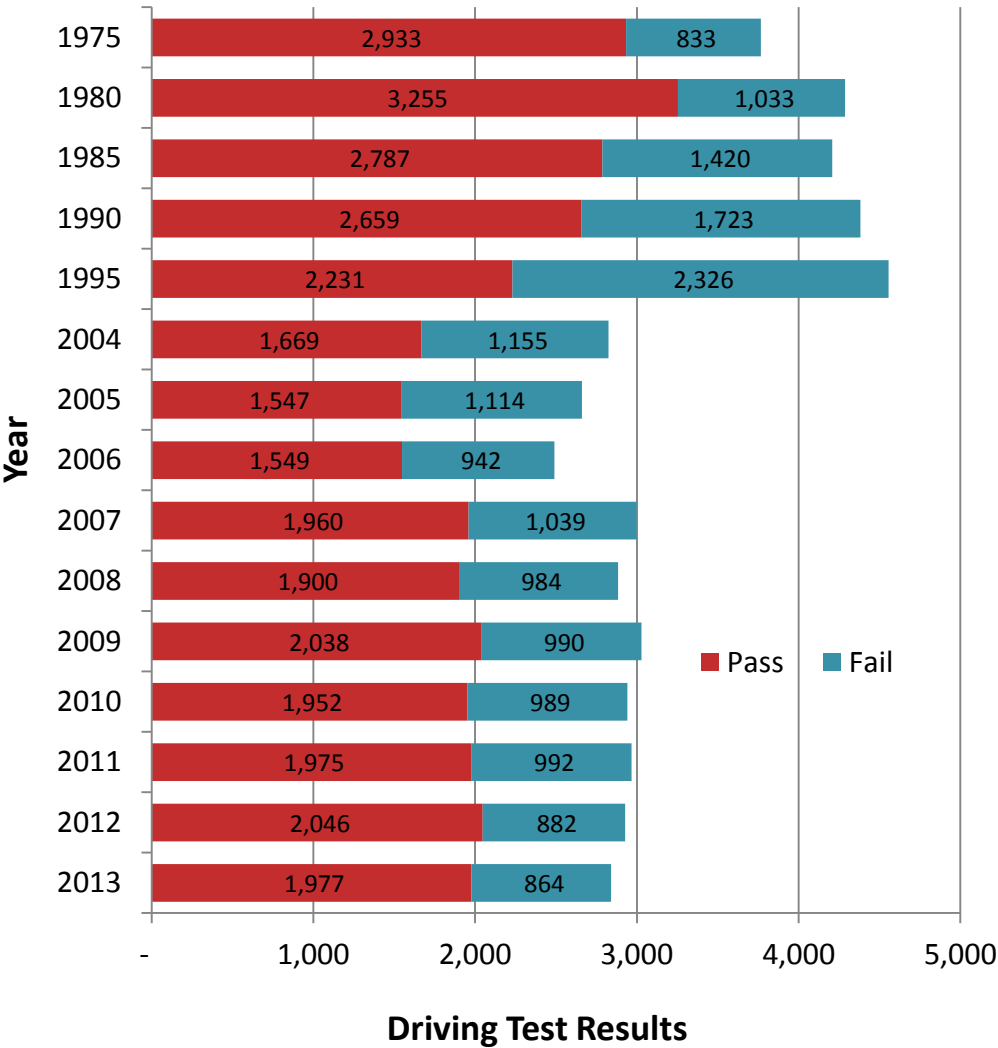
In 2013, 2,841 people (1,699 males and 1,142 females) took a practical driving test. A higher proportion of males passed than females, with 1,258 males (74%) and 719 females (62%) passing. In total, 864 people failed, made up of 51% males and 49% females. Of the total practical driving tests, 2,146 (75%) were taken in a car, the same proportion as 2012 but slightly down on previous years. Powered two wheeler tests fell by more than 6% compared to 2012 and accounted for 501 (17%) of tests.

Table 24.1 Practical Driving Test Results by Gender, 2013

	Male	Female	Total
Pass	1,258	719	1,977
Fail	441	423	864

The number of driving tests taken in 2013 was the lowest since 2006.

Figure 24.2 Practical Driving Test Results, 1975-2013



Some 4,700 people booked a theory driving test in 2013, but more than one in 12 (388) failed to attend. Of those who did attend, 1,892 passed - a pass-rate of almost 44%, the lowest figure recorded to date.

Source: Driver and Vehicle Standards Department.

Households without access to a car or van

The 2011 Census found that one in six (16%) private households did not own or have access to a car or van, a figure unchanged from 2001 (16%) and slightly lower than in 1989 (20%). The proportion of households without a car/van was lower than in the UK¹³ (23%).

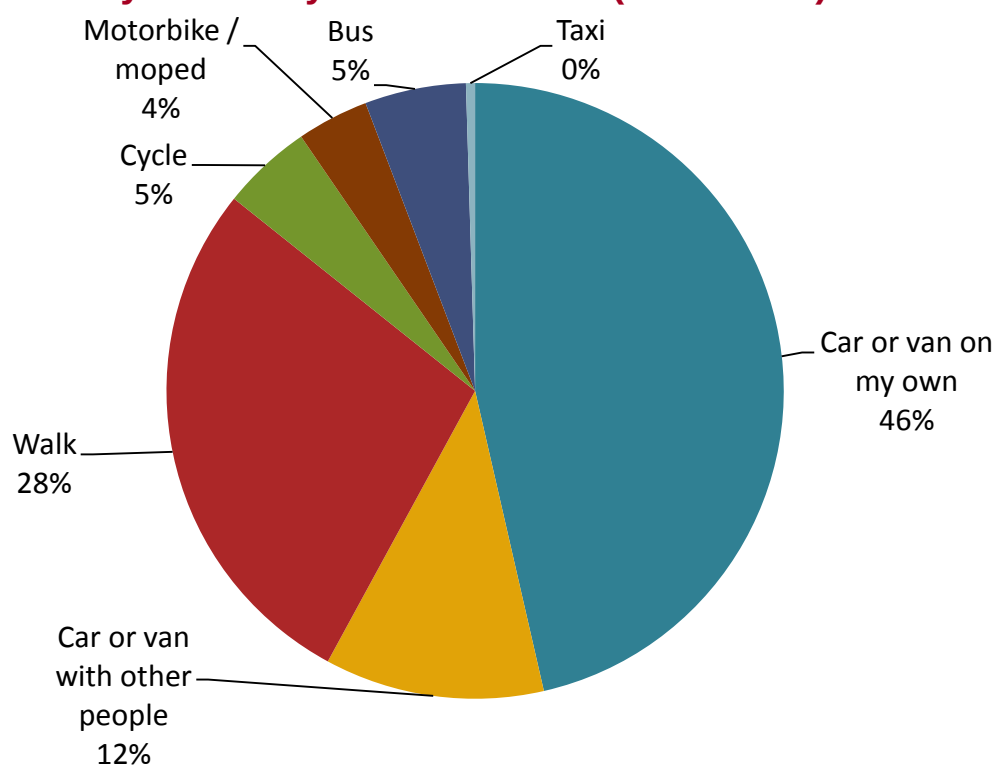
Nearly a third (30%) of households living in St Helier did not have a car/van. More than one in five (22%) private households in rural parishes had three or more cars/vans for private use.

Of those households without access to a car/van, two-fifths (40%) were single adults and a quarter (24%) were single pensioners.

Transport to work

Excluding those who worked from home, or lived at their place of work (4% of workers), three-fifths (58%) of workers travelled to work by car, whilst over a quarter (28%) walked to work – particularly those who lived in St. Helier, where half (51%) of workers walked to work. There has been no significant change in work travel patterns over the last five years.

Figure 24.3 How do you usually travel to work? (JASS 2013)



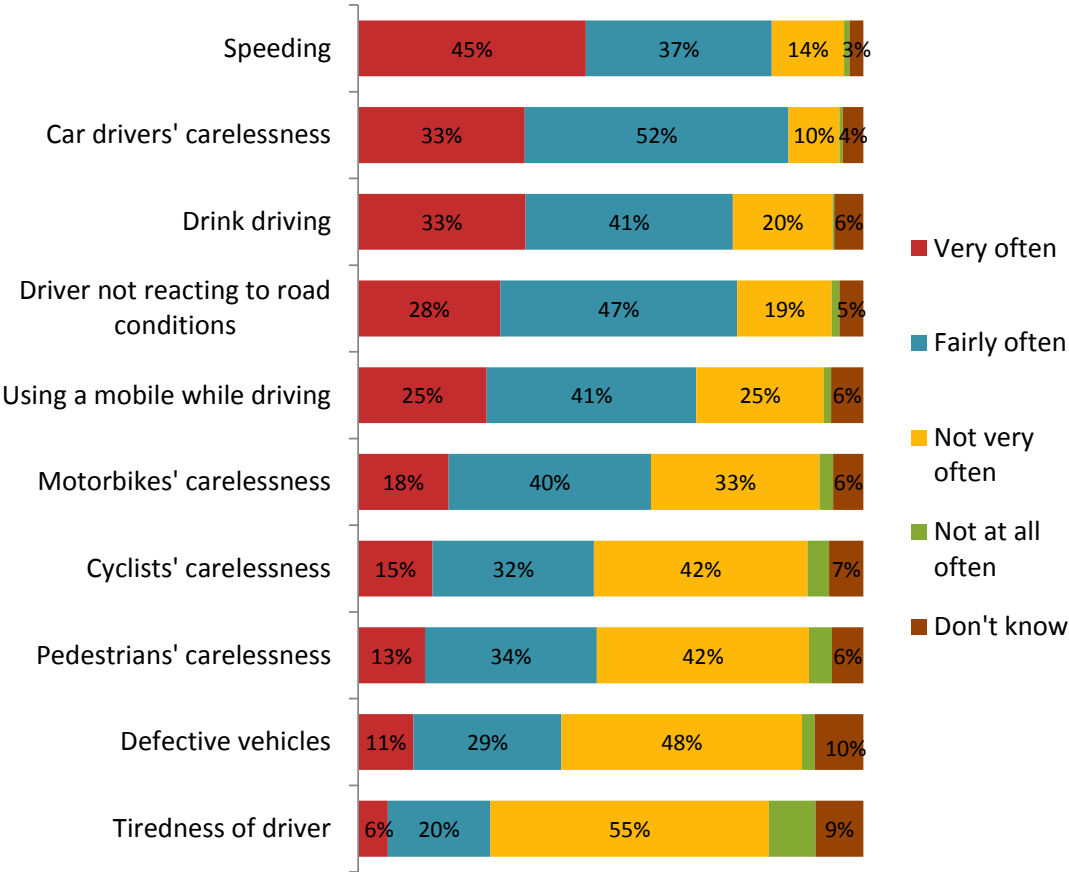
Half of the 58% of workers who travelled to work by car reported walking, cycling or taking the bus to get to work at least occasionally. The other half (51%) 'never' used any of these alternative methods of travel.

¹³ Source: General Lifestyle Survey 2010; Office for National Statistics

Road Safety

Three-quarters (74%, excluding those who ‘don’t know’) of respondents to Jersey Annual Social Survey 2012 ‘agreed’ or ‘strongly agreed’ that more should be done to improve road safety in Jersey. When asked to identify the most frequent causes of crashes in Jersey, speeding and car drivers’ carelessness were identified by the respondents as the top two causes, followed by drink driving and drivers not reacting to road conditions.

Figure 24.4 In Jersey, when driving, what do you think causes most crashes?



Further reading: Jersey Annual Social Survey 2012

The above *perceptions* of the causes of crashes can be compared with those records maintained by the Transport and Technical Services department of the *actual* causes of car crashes in Jersey, including those that cause serious injury and those that cause slight injuries. From this data, for 2003-2011, the three most frequent causes of crashes in Jersey were drivers’ carelessness, accounting for just under half of known causes of crashes, followed by drivers not reacting to the conditions, and speeding, each of which were the identified cause of approximately one in seven crashes.

Road conditions

JASS 2013 found that three-fifths (59%) of residents consider the condition of the surfaces of main roads in Jersey to be ‘good’ or ‘very good’. People were more positive about the condition of the surfaces of the pavements in Jersey, with nearly three-quarters (70%) rating them as ‘good’ or ‘very good’.

Further reading: Jersey Annual Social Survey 2012 & 2013

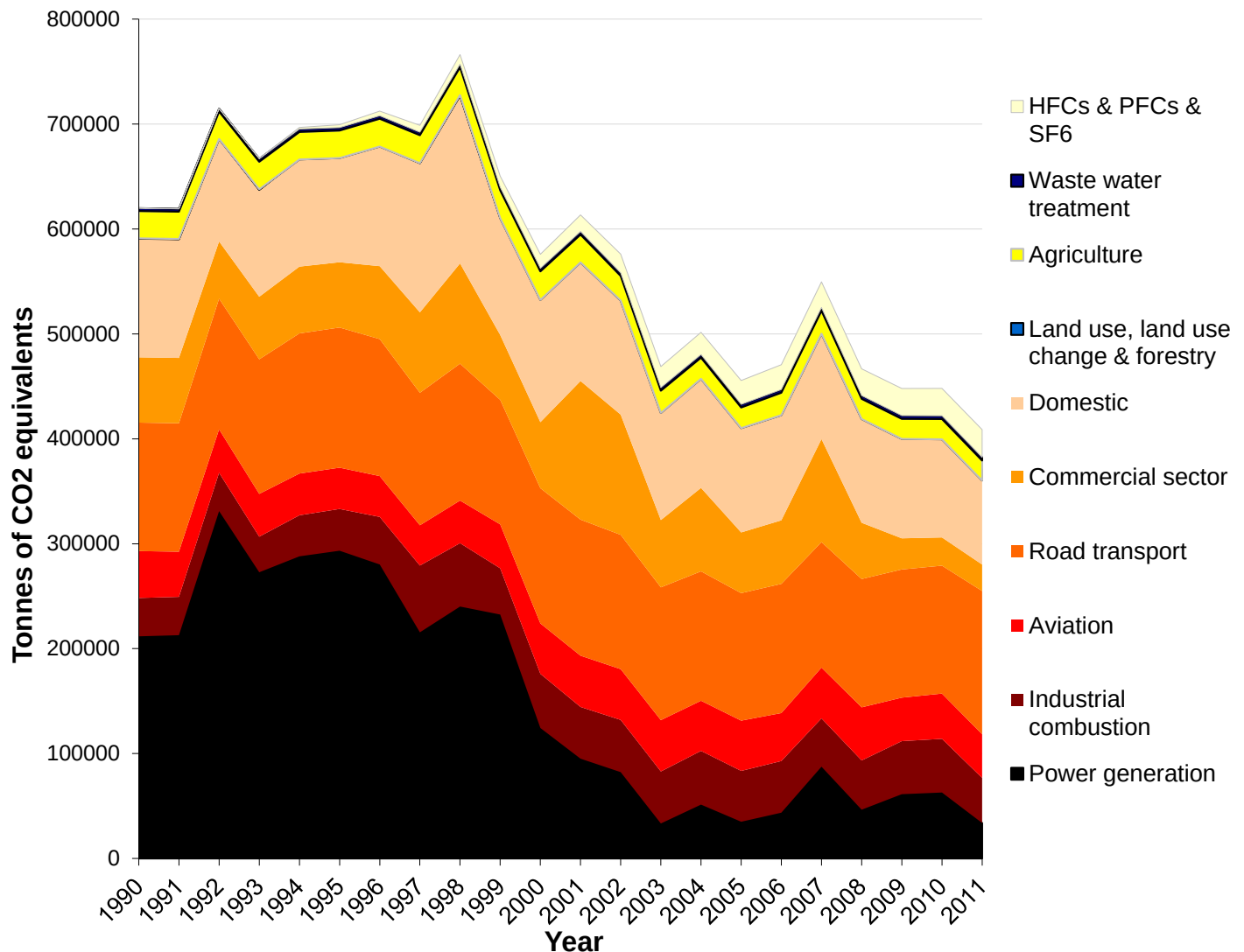
25. Energy and Environment

Green House Gas Emissions

Jersey is a signatory of the Kyoto Protocol and as such is committed to reducing its emissions of Green House Gases.

By switching the main electrical energy supply from an on-Island oil-fired plant to imported electricity from the European Grid, the Island's Green House Gas emissions have reduced. However, in June 2012 the original submarine cable from France failed permanently. Until the planned third cable is installed (estimated completion date in 2015) Jersey Electricity plc are generating a proportion of its electricity on-Island using a combination of gas turbines and diesel engines. This has caused a temporary rise in Jersey's greenhouse gas emissions, as can be observed in the increase in emissions from the industrial combustion sector.

Figure 25.1 Greenhouse Gas Emissions (tonnes of CO₂ equivalents)



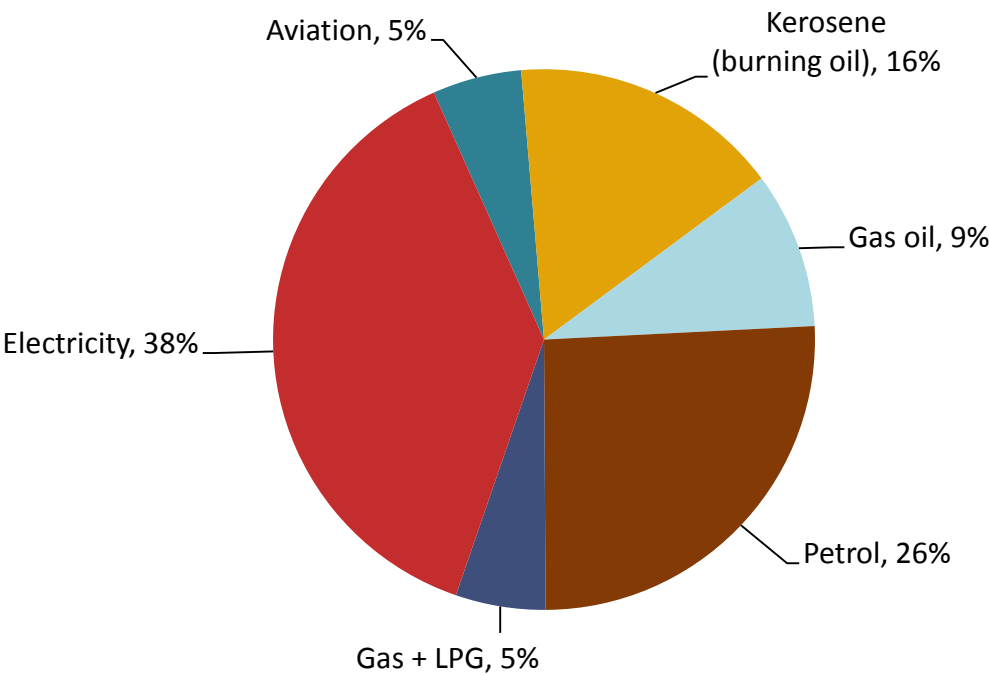
Source: AEA on behalf of the Department of the Environment,
(please note 2012 data is still in draft form)

Energy

Jersey is heavily dependent on imported energy. In 2011 less than 2% of the Island’s energy supply was produced on-Island as electricity generated by the new Energy from Waste (EfW) plant.

In 2011, total final energy consumption¹⁴ in Jersey was 168,040 toe (tonne of oil equivalent) (1.95 million MWh). Final energy consumption has decreased on an annual basis for each of the last two calendar years. More than half (56%) of all energy used in Jersey is a kind of petroleum product, with petrol accounting for a quarter of final energy demand. Electricity accounted for almost two-fifths (38%) and gas (including LPG) for the remaining 5%.

Figure 25.2 Jersey’s total final energy consumption, by fuel type 2011



¹⁴ As 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).

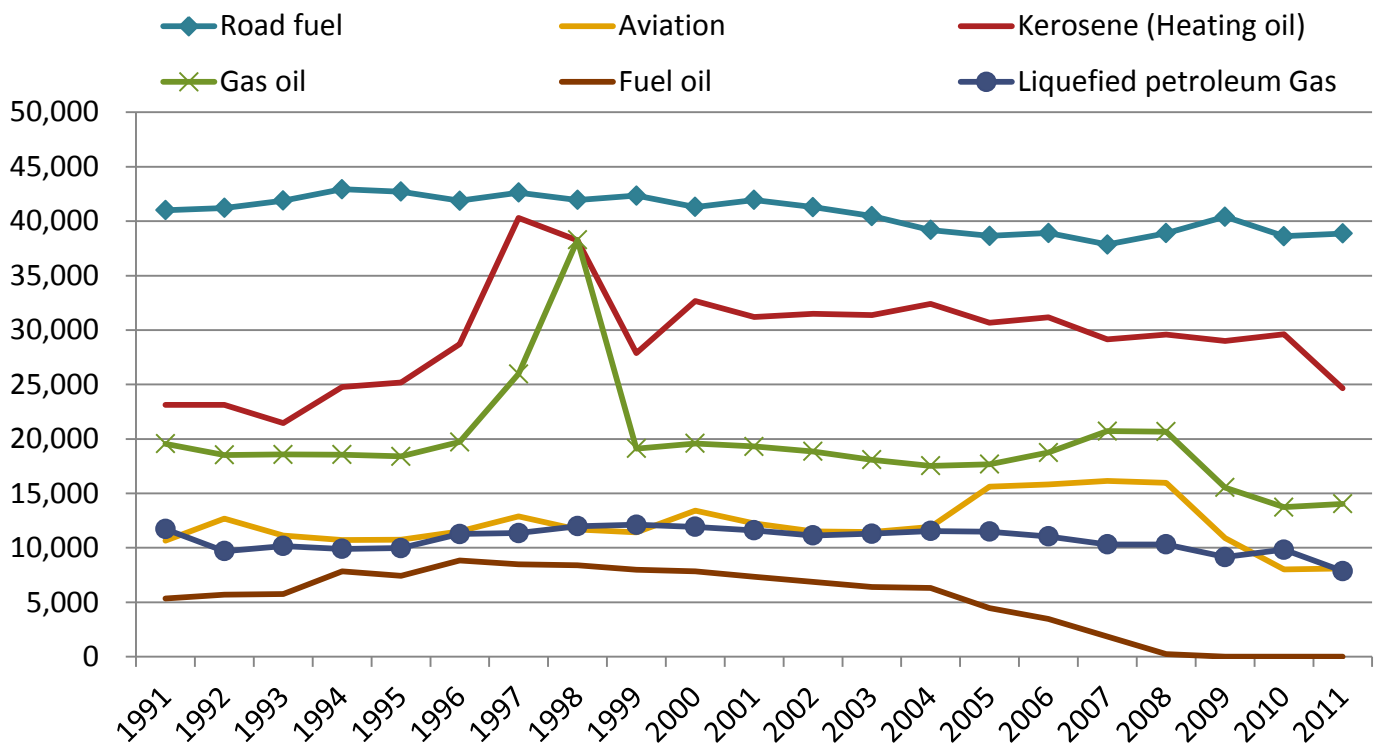
Petroleum Products

All the petroleum products used in Jersey are imported. From the perspective of consumption, the greatest change within the overall use of such products in Jersey over the past two decades has been the decline in oils (fuel oil and gas oil) used to generate electricity on-Island as a consequence of the introduction of the interconnector from France importing electricity.

Overall, total imports of petroleum products were almost 14% lower in 2011, than in 2010 (98,028 tonnes in 2011 compared with 113,545 in 2010). Since 2011, the EfW plant no longer uses gas oil in generating its power and now only burns waste. In 2011, the EfW plant burnt some 62,900 tonnes of waste and produced 32,900 MWh of electricity.

Total consumption of road fuels has been broadly flat for the past decade, although there has been a considerable change in its makeup. In 1991, leaded fuel accounted for 60% of all road fuel used, whereas in 2011 unleaded fuel accounted for 62%.

Figure 25.3 Final consumption of petroleum products, 1991-2011 tonnes



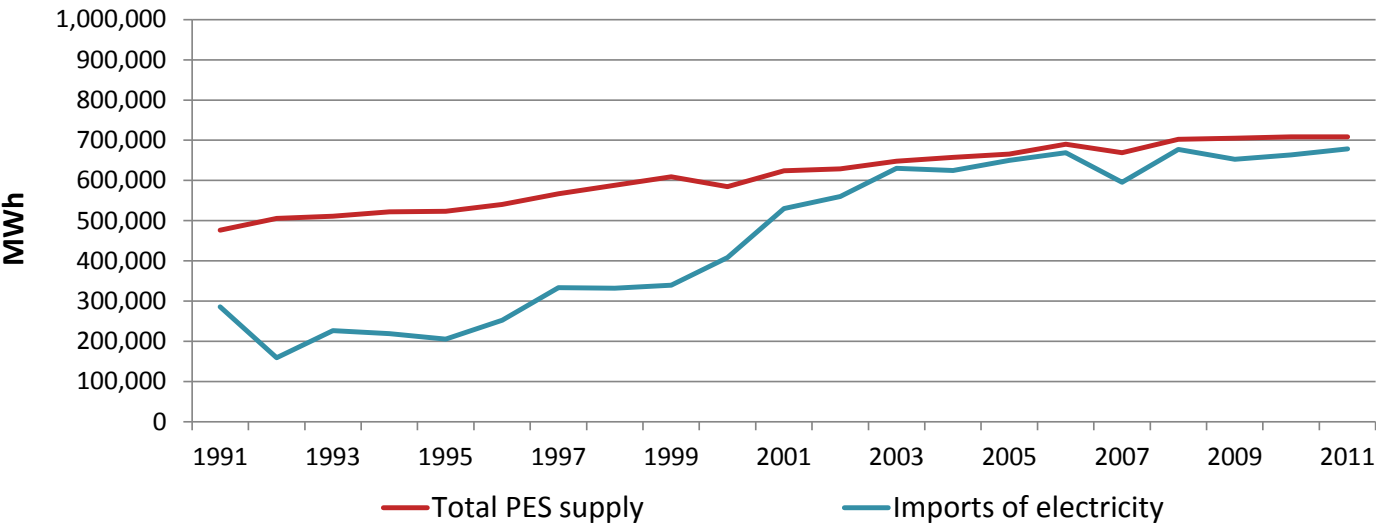
Between 2001 and 2011 there has been a net decrease of around 3,000 tonnes (7%) in the total consumption of road fuel in Jersey, comprising falls for Lead Replacement Petrol (LRP) and unleaded and an increase in diesel. Such changes highlight the phasing out of leaded fuel, an increased efficiency in engine design as well as diesel-fuelled vehicles becoming more widely used.

Electricity

Electricity demand has increased during the past 20 years, by an average of about 2% per annum, such that consumption in 2011 was almost 50% higher than in 1991.

The most dramatic change within the electricity sector in Jersey has been the growth in importation. Throughout most of the 1990s imported electricity accounted for between 40% and 60% of public electricity supply; in recent years this has risen to more than 90%. As mentioned previously, the failure of the original submarine cable from France in June 2012 has resulted in some on-Island generation of electricity using fossil fuels pending the installation of the planned third cable.

Figure 25.4 Total public electricity supply (PES) and imports, 1991-2011; MWh



Further reading: Jersey Energy Trends 2011, States of Jersey Statistics Unit

26. Water

Jersey Water

Jersey Water supplies water to approximately 38,000 homes and businesses from two water treatment works.

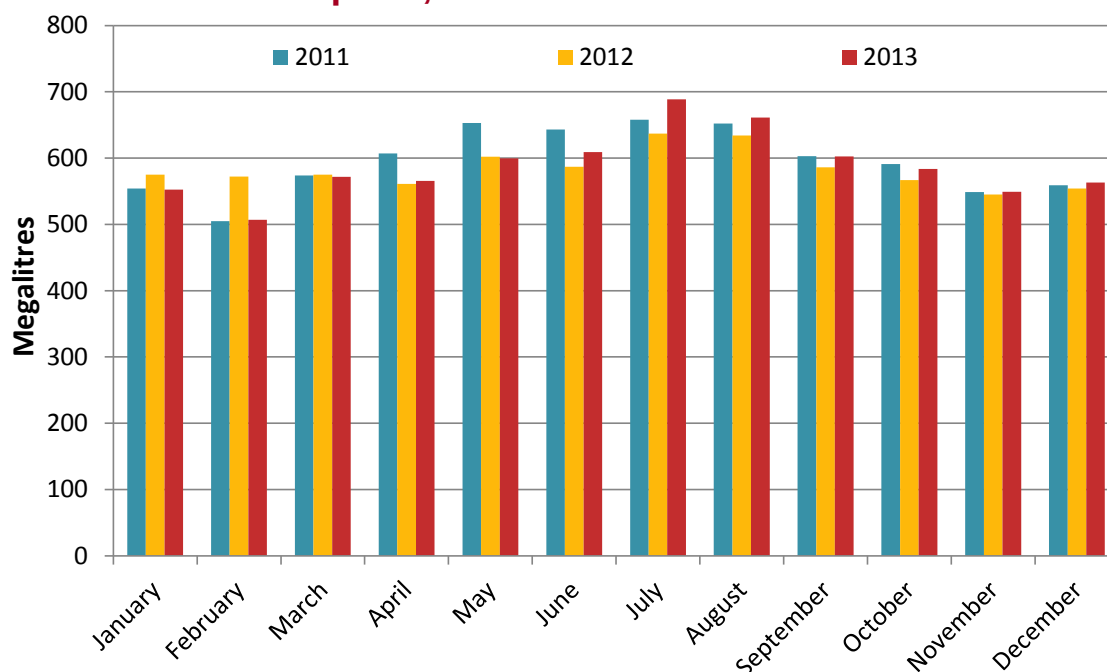
In 2013, Jersey Water supplied 7,047 million litres through a 580 km network of water mains. Jersey's water resources are nearly all derived from rainfall dependent surface waters. Jersey Water collect and store raw (untreated) water in six storage reservoirs with a capacity of 2,687 million litres, which is equivalent to approximately 120 days of average demand.

In 2013, Jersey Water installed 3,700 water meters as part of its rollout of Island-wide water metering project. By the end of the project, due to be completed by mid-2015, 90% of customers will be on water meters.

Table 26.1 Water Connections and demand, 2010-2013

	Units	2010	2011	2012	2013
Total Water supplied	MI	7,220	7,182	7,015	7,047
Maximum daily demand	MI	25.8	24.7	19.1	19.3
Annual rainfall	mm	982	773	1,089	938.7
New mains laid	km	1.7	2.0	1.5	1.5
Mains re-laid / relined	km	2.7	4.0	2.1	2.5
New connections	No	337	492	349	406

To find out more about Jersey Water and its operation visit www.jerseywater.je.

Figure 26.1 Water Consumption, 2011-2013

Further reading: Jersey Water Annual Report and Financial Statements, www.jerseywater.je

Bathing Water Quality

Bathing water data is collected by the Department of the Environment and is independently assessed by The Centre for Research into Environment and Health, UK. The results are forwarded to The Marine Conservation Society (MCS) for inclusion in the UK Good Beach Guide.

In 2013, all sixteen beaches tested passed the 'European Imperative Standard'. The 100% compliance rate was higher than the UK average. Fourteen out of sixteen beaches passed the stricter 'European Guide Standard' in 2013 compared with 12 passes in 2012. The increase in Guide pass rate was probably due to less rain recorded during the 2013 bathing season creating less run-off from land into bathing waters.

Table 26.2 Compliance of bathing waters with European Community bathing water standards, 2013

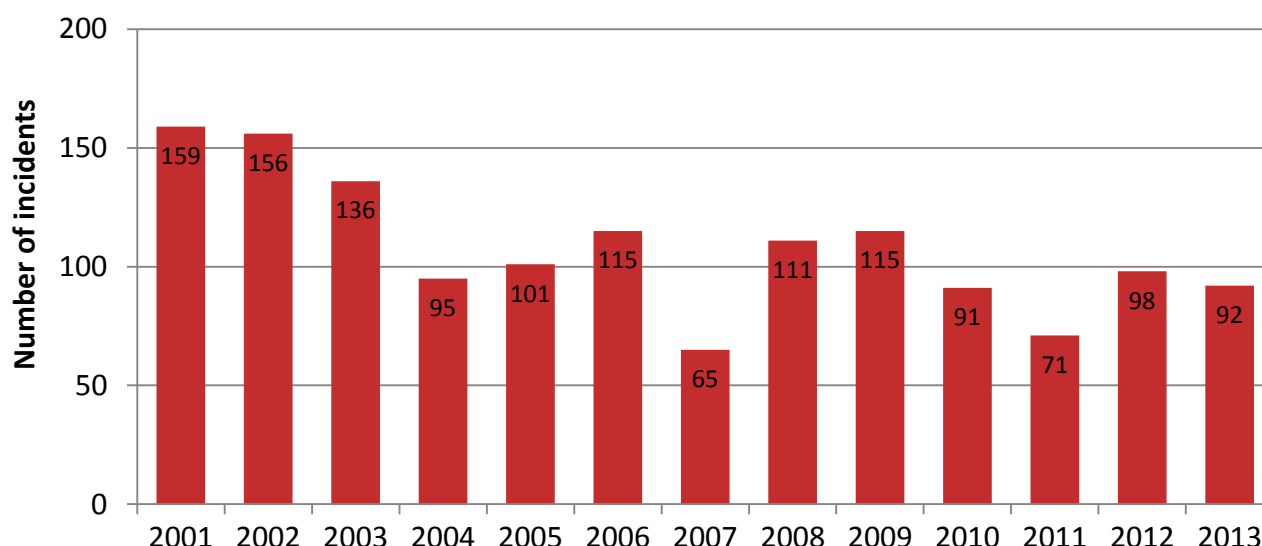
Location	European Imperative Standard	European Guide Standard	Location	European Imperative Standard	European Guide Standard
St Brelade's Bay	✓	✓	Victoria Pool	✓	✓
Beauport	✓	✓	Grouville	✓	✓
Portlet	✓	✓	Archirondel	✓	✓
La Braye	✓	✓	Havre des Pas	✓	✓
Plemont	✓	✓	Green Island	✓	✓
Greve de Lecq	✓	✓	Bouley Bay	✓	✗
Watersplash	✓	✓	Rozel	✓	✓
La Haule	✓	✓	Bonne Nuit	✓	✗

✓ = Pass, ✗ = Fail

Pollution Incidents

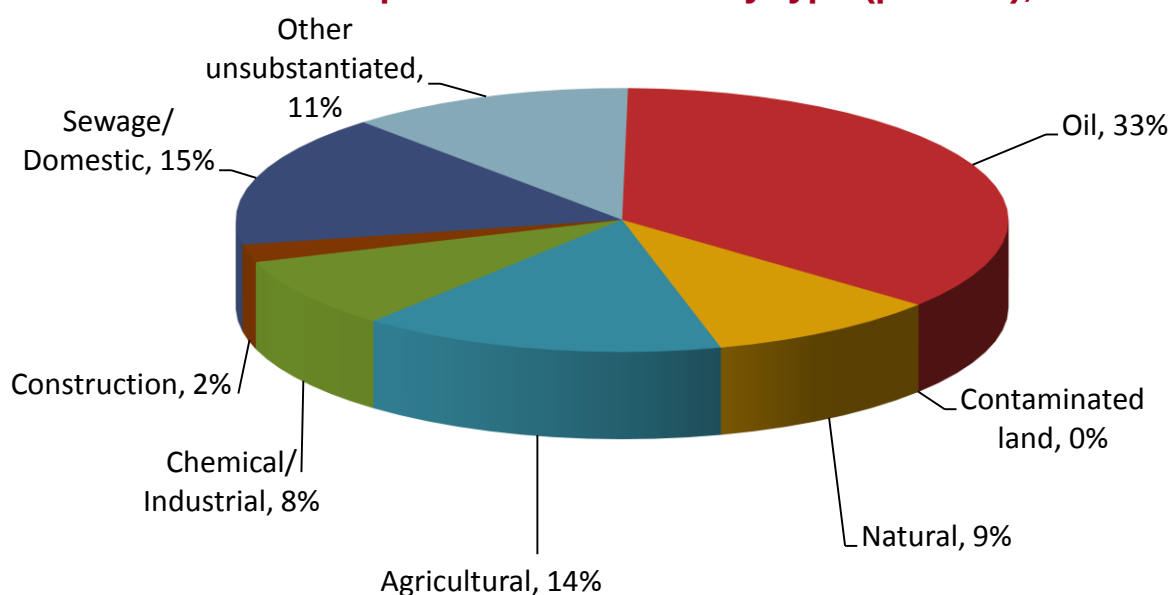
A total of 92 water pollution incidents were reported to Environmental Protection in 2013¹⁵. The number of reported incidents has decreased slightly (down by 6%) compared to 2012 which was 30% higher than in 2011 (Fig 26.2). The latest annual figure is similar to the recent long-term average (2004-2013). Environmental Protection are continuing to try to reduce this number through its pollution prevention campaigns and public engagement.

Figure 26.2 Total number of reported pollution incidents, 2001-2013



In 2013, oil incidents accounted for over a third of the total reported incidents (36%) (see Figure 26.3).

Figure 26.3 Distribution of pollution incidents by type (percent), 2013



¹⁵ Pollution incidents are reported through the Department's pollution hotline, Tel: 709535.

Water Resources

The Water Resources (Jersey) Law 2007 came into force on 1st January 2010. The Law requires that water abstractions for non-domestic purposes that exceed 15 cubic metres in any 24 hour period, from surface (streams, reservoirs etc.) or sub-surface sources (from wells and boreholes) must be licensed. Water abstractions of less than that quantity from sub-surface sources must be registered.

Table 26.3 Principal uses of water abstracted under Water Resources licences and registrations in December 2013

Water use	Sub-surface (groundwater) abstractions		Surface water abstractions
	Number of registrations	Number of licences	Number of licences
Agriculture	76	63	77
Amenity	12	20	0
Business	171	28	0
Domestic – household supply	2,134	0	0
Domestic – other uses	784	0	0
Horticulture	4	6	0
Public Service	33	2	1
Public Supply	0	2	15
Total	3,214	121	93

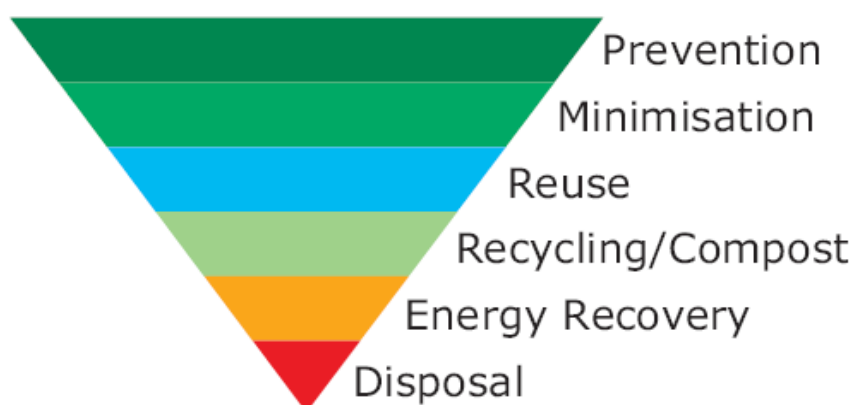
NB: Registration data has been reassessed since 2012 resulting in re-classification of principal water use in some cases.

Almost 10% of the population of Jersey obtain their household water supplies from private sources (boreholes, wells and springs). In 2013 there were a total of 3,388 households using registered or licensed private water supplies (boreholes, wells and surface water); these served an estimated 9,398 people. The majority of these registered water abstractions provide a domestic supply to a single property. The estimated total quantity of water abstracted for domestic household requirements from private sources is almost 510,000 cubic metres (about 112.1 million gallons) per year.

27. Waste Management

The States of Jersey Solid Waste Strategy is based on the internationally recognised Waste Hierarchy (see Figure 27.1) which shows the preferred option of prevention at the top, working downwards to the least preferred option of disposal. Jersey's waste management solution is a partnership between local energy recovery at the Energy from Waste plant at La Collette and recycling which involves both on and off Island processing.

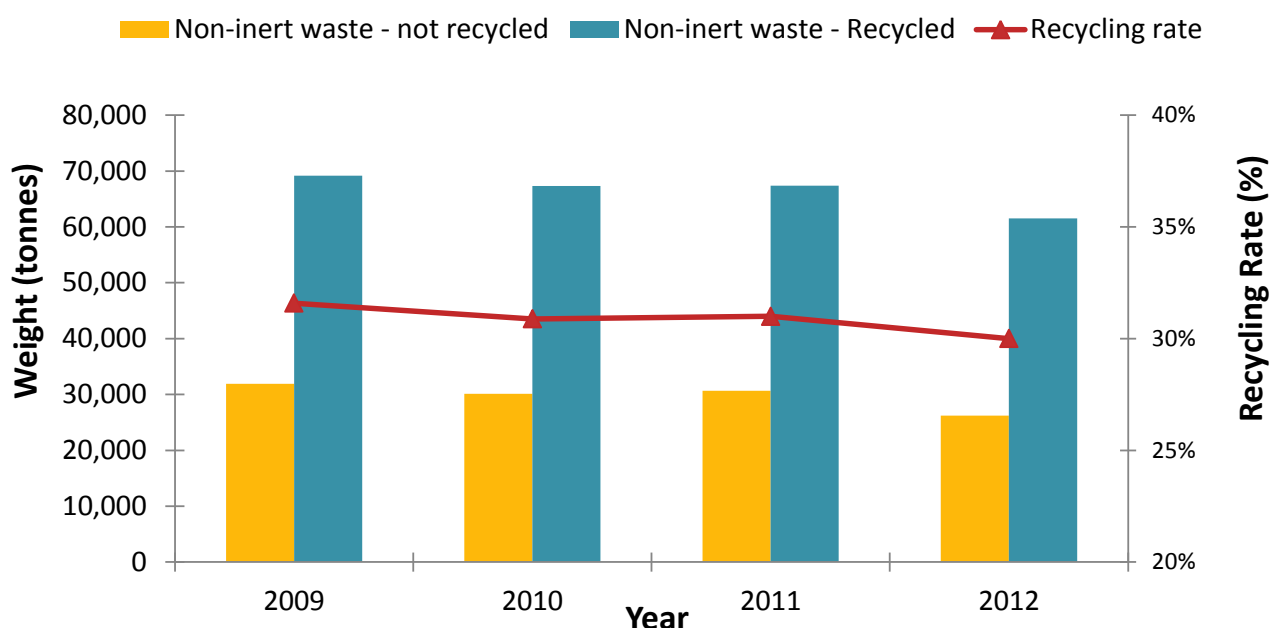
Figure 27.1 Waste Hierarchy



Recycling Rate

Jersey achieved a recycling rate of 32% in 2013, recycling a total of 33,297 tonnes of material including garden waste, paper and televisions. The target currently in place is to reach a recycling rate of at least 36% by 2018; this target is under review and a new five-year Solid Waste Strategy will be released in 2014.

Figure 27.2 Total non-inert waste received at Bellozanne and percentage recycled



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. Jersey residents produce around the same amount of waste on average as UK residents (480 kg) but 245 kg less per person than US residents.

Table 27.1 Waste recycled (including composting), 2010-2013 (tonnes)

	2010	2011	2012	2013
Paper and card	7,021	7,519	7,217	6,261
Packaging wood*	1,000	1,000	1,000	1,000
Metal packaging	84	86	96	97
Textiles	477	399	331	371
Plastic (supermarket film, agricultural crop cover and plastic bottles)	964	886	1,291	1,332
Glass	7,190	6,383	5,245	5,224
Green waste received	12,038	12,776	9,395	15,789
Household metals	869	1,175	1,135	2,308**
Electrical and Electronic Equipment	446	428	546	900
Batteries	4	7	12	15
Total recycling	30,093	30,660	26,268	33,297
Non-recyclable waste:				
Parish deliveries to Energy from Waste (EfW)	38,023	37,251	37,250	37,066
Miscellaneous deliveries to EfW	6,792	10,293	6,114	9,742
Bulky waste deliveries for shredding	21,994	19,320	17,632	24,310
Grit & rags from Sewage Treatment Works to EfW	547	540	540	667
Total residual	67,356	67,404	61,536	71,785
Total non-inert	97,449	98,064	87,804	105,082
Recycling rate (of non-inert)	31%	31%	30%	32%
Other figures (excluded from above)				
Scrap metal exported	11,020	6,523	8,737	8,122
Aggregates	75,445	46,339	57,403	61,149
Plasterboard	0	0	83	788
Ash	14,861	16,925	15,562	16,470
Sewage processed (million cubic metres)	10.2	9.2	10.5	10.9
% of sewage receiving full treatment	97.5	97.8	98.2	98.0

* An estimated tonnage of packaging timber collected by the private sector for reuse and recycling.

** Includes metals collected from the commercial reception at the Energy from Waste plant

Recycling

The overall recycling rate in Jersey in 2013 was 32%.

The year-on-year increase can largely be explained by increases in two areas: the increase in green waste that was received for composting; and the increase in bulky wastes received for recovery at the Energy from Waste facility.

The increase in green waste can be attributed to the weather experienced in the first quarter of 2013. The damage caused by high winds and an unusual amount of snow fall led to trees being felled and/or cut back. This waste was received for composting at La Collette.

The term 'bulky waste' is used to refer to large non-recyclable items such as furniture, mattresses, wood and plastics that are shredded before being processed for local energy recovery. The increase recorded in 2013 can be attributed to the waste generated from large demolition projects and to the processing of strategically stored waste.

Smaller increases were also recorded in the tonnages of electrical and electronic equipment and batteries that were collected for recycling. This can be attributed to campaigns Transport and Technical Services (TTS) has run to encourage participation in these recycling schemes and to educate Islanders regarding the importance of not throwing these items away with general rubbish. TTS has engaged with schools, community groups, parishes and the commercial sector to increase the recycling rates for these materials which are exported for specialist recycling.

The priorities for the TTS Recycling Team are aligned to the Waste Management Licence for the Energy from Waste plant sited at La Collette. The Licence lists materials that should not be sent for local energy recovery such as metals, batteries, glass and electronic goods. In order to increase the recycling rate of these waste streams TTS is continuing to focus on specific campaigns to educate all sectors of the local community.

Kerbside

The parishes of St John, St Lawrence, St Mary and Trinity continued their household kerbside collections in 2013 by providing householders with a monthly collection for metal packaging, paper and plastic bottles with the parishes of St Lawrence and St Mary also including cardboard recycling. The parish of St Helier also continued to expand their kerbside recycling collection which provides a fortnightly service.

All parishes except St Helier also continued to provide household glass collections. St Helier, which accounts for approximately a third of the Island's households, continued to collect household glass using a bring bank system, although a household glass collection was provided to specific areas of St Helier in 2013 as a trial.

Bring-Banks

By the end of 2013, the bring-bank network contained 19 sites where household paper, metal packaging, plastic bottles and batteries can be collected for recycling. Cardboard recycling is also available at 8 sites to make it easier for Islanders to recycle household boxes and card packaging. TTS plan to continue to increase the number of bring banks, prioritising sites along main access routes across the Island.

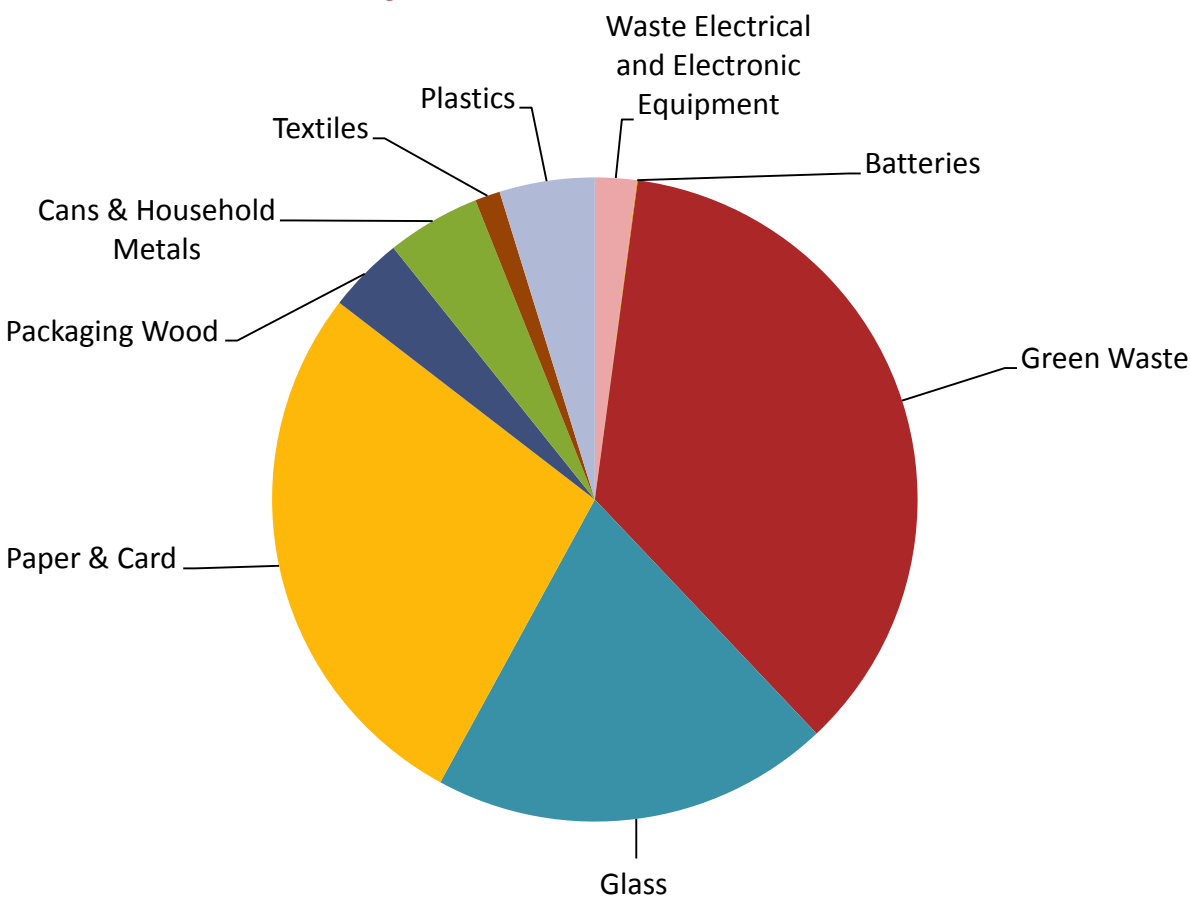
Recycling Centre

The Household Recycling Centre at Bellozanne opened in June 2007. The site continues to provide collection facilities for a wide range of materials from TVs and light bulbs to used cooking oil and cardboard.

Green Waste

Garden waste is composted for use on agricultural land and in gardens as a “Soil Improver”. TTS also encourages households to compost their own kitchen and garden waste by providing subsidised home composting kits for sale through garden centres.

Figure 27.3 Tonnes of recycled materials in 2013



Once the materials are collected, they are processed for recycling. The next step in each material’s life cycle is shown in Table 27.2.

Table 27.2 Recycling process by material

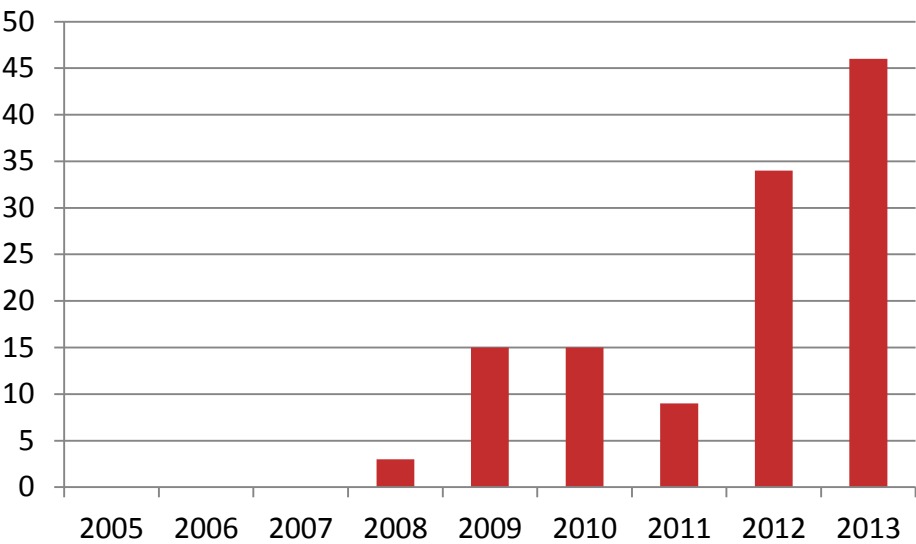
Material	Recyclable	Destination	Outcome
Paper and cardboard	✓	Exported to UK recyclers	Processed to create recycled paper and card products
Packaging wood	✓	Processed locally	Reused, animal bedding and kindling wood
Metal packaging	✓	Exported to UK recyclers or European recyclers	Melted down into raw metals and used to create recycled metal products, e.g. food and drink cans
Textiles	✓	Re-used locally or exported by local charity	Re-used or recycled into fabric by textile mills
Plastics	✓	Exported to UK recyclers	Processed to create recycled plastic products
Glass	✓	Processed locally	Used as a basic construction aggregate
Green waste	✓	Processed locally	Agricultural compost or Soil Improver (household use)
Electrical & Electronic equipment	✓	Exported to UK recyclers	Components are separated and recycled into metal and plastic products
Batteries	✓	Exported to UK recyclers	Recycled into metal products including new batteries

Source: Transport and Technical Services

Waste Management

A total of 46 waste incidents, on unlicensed sites (i.e. sites not carrying out a waste activity which is authorised by waste management licence), were reported to Environmental Protection in 2013¹⁶. The number of reported incidents has increased by 35% compared to 2012 (Fig 27.4). Environmental Protection believes that the number of waste incidents has risen due to the heightened profile of the Waste management (Jersey) Law 2005.

Figure 27.4 Total number of reported unlicensed waste incidents 2005 - 2013



In 2013, Fly-tipping accounted for nearly half (46%) of the total reported incidents. The remaining incidents were categorised as; burning (28%), other (22%), unsubstantiated (4%) and pesticides (2%).

Source: Department of Planning & Environment

¹⁶ Waste incidents are reported through the Department’s pollution hotline, Tel: 709535

28. Climate

Meteorological data has been recorded at the Maison St Louis Observatory in St Saviour since 1st January 1894, when it was founded by Father Marc Dechevrens. Administered by the Jersey Meteorological Department, based at Jersey Airport, the long and continuous data set from the Observatory makes an important contribution to studies of climate change and the possible impact on the Channel Islands.

Records of various meteorological elements including, sunshine, rainfall, wind, temperature, waves and swell are also made at a number of on Island and offshore sites.

Data referred to within this report is measured at the following sites: temperature and rainfall at the Maison St Louis Observatory, sunshine at the Fort Regent Signal Station and sea temperature at St. Helier Harbour.

Table 28.1 Temperature, Sunshine and Rainfall, Period Averages 1981-2010

	Daily Temperature(°C)	Daily Sunshine (hours)	Monthly Rainfall (mm)
Jan	6.6	2.3	92.4
Feb	6.5	3.4	70.8
Mar	8.5	4.5	69.4
Apr	10.4	6.8	56.2
May	13.5	7.8	54.7
Jun	16.1	8.6	48.2
Jul	18.1	8.5	44.3
Aug	18.3	7.9	51.3
Sep	16.5	6.4	62.7
Oct	13.4	4.0	104.7
Nov	9.9	2.8	106.3
Dec	7.3	2.2	113.7
Monthly Mean	12.1	5.4	Year total: 874.7

Source: www.jerseymet.gov.je

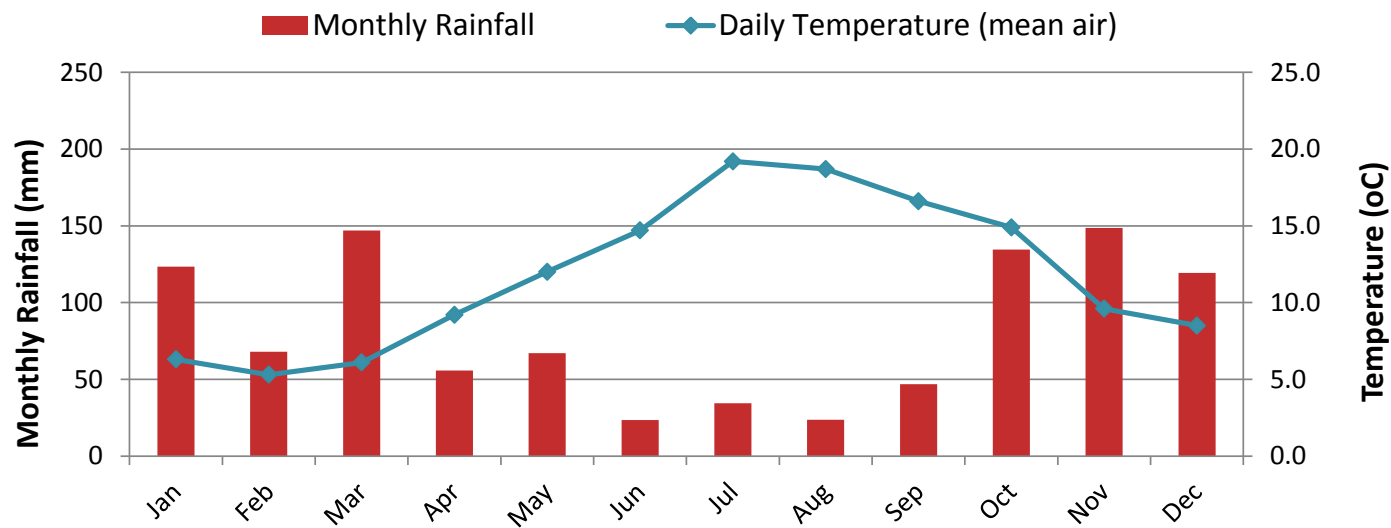
In 2013 the mean daily air temperature was 11.7°C. The highest maximum air temperature recorded during the year was 30.6°C on 1st August and lowest minimum was -1.6°C on 17th January.

The rainfall total for the year was 992.3mm. 213 rainfall days were recorded, with 0.2mm or more. The wettest day of the year was 11th March with 54.3mm of precipitation recorded during a significant snowfall event.

The sunshine total for the year was 2126.6 hours.

The mean daily sea temperature was 12.5 °C. The highest sea temperature recorded during the year was 18.9°C on 31st August and lowest was 6.7°C on 3rd March and 4th April.

Figure 28.1 Temperature and Rainfall, 2013



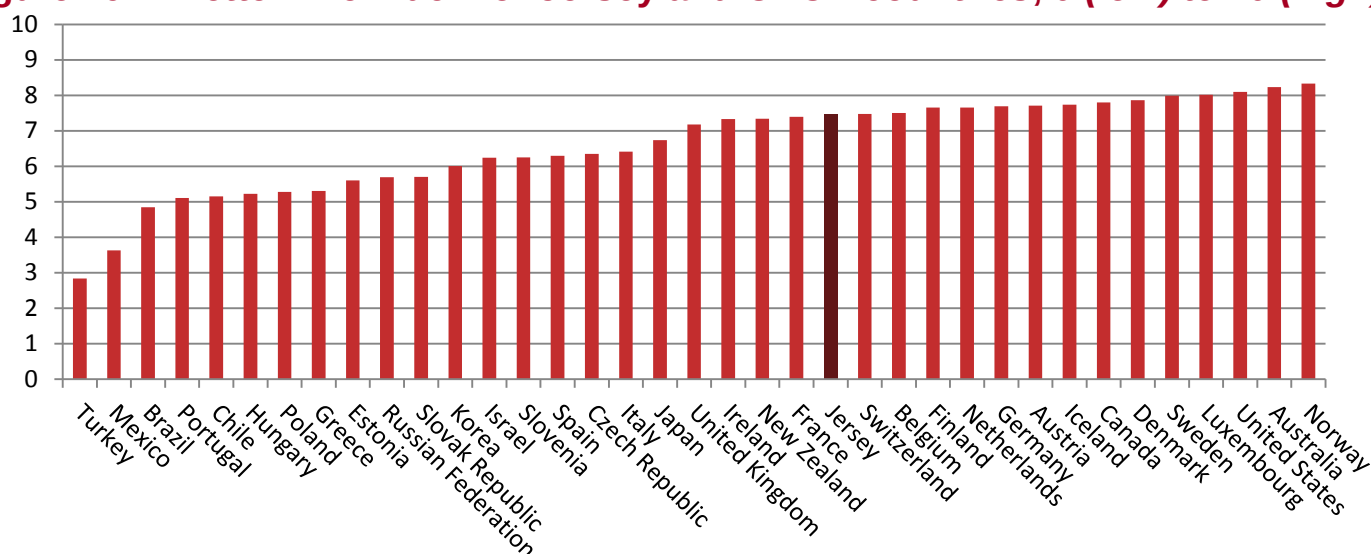
Source: Jersey Meteorological Department

29. Better Life Index

Published for the first time in 2013, 'Jersey's Better Life Index' aims to provide a measure of the Islands "well-being", both from an overall perspective and also at a more detailed level.

Jersey's overall Better Life Index of 7.5 (out of 10) ranks Jersey behind 14 of the 36 OECD countries (see Figure 29.1). In terms of overall well-being, this score places Jersey slightly below Switzerland and Belgium but above our neighbours, the United Kingdom, France and Ireland.

Figure 29.1 Better Life Index for Jersey and OECD countries; 0 (low) to 10 (high)

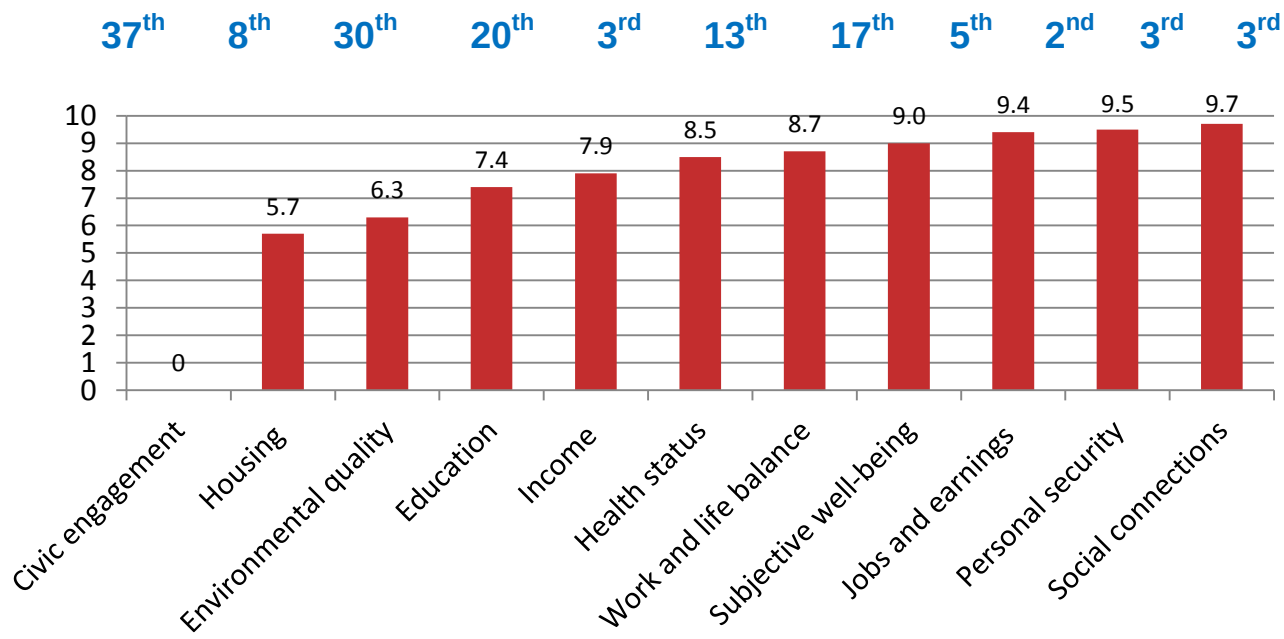


Nordic countries rated highly in terms of overall well-being, with Denmark, Sweden and Norway all ranking in the top six OECD countries; Norway had the highest overall score.

In contrast, the lowest scores on overall well-being were recorded by the Latin-American countries of Mexico, Brazil and Chile, and in Europe by Turkey, Portugal, Hungary, Poland and Greece.

Scores and rankings for Jersey (relative to all 36 OECD countries) for each of the 11 dimensions included in the 'Better Life Index' are shown in Figure 29.2. Each score is on a scale of between 0 and 10, where 0 signifies the lowest possible score and 10 the highest. Jersey ranks relatively highly in several dimensions, including social connections, personal security and jobs and earnings, but ranks less well in others, including education and environmental quality, and ranks particularly poorly (lower than all OECD countries) in civic engagement (voter turnout).

Figure 29.2 Relative scores (out of 10) and *rankings* for Jersey in the dimensions of the Better Life Index



Further Reading: Jersey’s Better Life Index, States of Jersey Statistics Unit

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Other Useful Websites

Citizens Advice Bureau	www.cab.org.je
Jersey Chamber of Commerce	www.jerseychamber.com
Jersey Consumer Council	www.jerseyconsumercouncil.org.je
Jersey Evening Post	www.jerseyeveningpost.com
Jersey Finance Limited	www.jerseyfinance.je
Jersey Financial Services Commission	www.jerseyfsc.org
Jersey Legal Information Board	www.jerseylaw.je
States Assembly	www.statesassembly.gov.je
States of Jersey	www.gov.je
The Société Jersiaise	www.societe-jersiaise.org

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Reports Published by the States of Jersey Statistics Unit

Following is a list of some of the latest reports issued by the Statistics Unit. All reports produced by the Unit can be viewed or downloaded from the website:

www.gov.je/statistics

(Publication frequencies are given in brackets)

Economy and Employment

- Measuring Jersey's Economy: Gross Value Added (GVA) 2012 *(annual publication)*
- Labour Market at June 2013 *(bi-annual publication)*
- Survey of Financial Institutions 2012 *(annual publication)*
- Business Tendency Survey, Quarter 4 2013 *(quarterly publication)*
- Retail Sales Index – Quarter 4 2013 *(quarterly publication)*
- Registered Unemployment *(monthly)*

Population

- Report on the Jersey 2011 Census
- Jersey Population Update 2012 *(annual publication)*
- Jersey Population Projection Report 2013

Housing

- House Price Index, Quarter 4 2013 *(quarterly publication)*
- Housing Needs Survey 2012
- Housing Affordability Index *(annual publication)*

Prices and Earnings

- Retail Prices Index, December 2013 *(quarterly publication)*
- UK/Jersey price comparison, June 2013 *(annual publication)*
- Index of Average Earnings, June 2013 *(annual publication)*
- Income Distribution Survey, 2009/2010
- Jersey-UK Relative Consumer Price Levels for Goods and Services 2013

Other

- Jersey in Figures 2013 *(annual publication)*
- Jersey Economic Digest 2013 *(annual publication)*
- Jersey Energy Trends 2011
- Jersey Annual Social Survey – 2013
- Jersey's Better Life Index - 2013

States of Jersey Statistics Unit Publication Dates for 2014

January	17	RPI – December 2013
	22	Business Tendency Survey – Q4 2013
February	20	House Price Index – Q4 2013
March	5	Retail Sales Index – Q4 2013
	12	Housing Affordability in Jersey 2013
April	11	Business Tendency Survey – Q1 2014
	17	RPI – March 2014
	29	Jersey in Figures
May	22	House Price Index – Q1 2014
June	11	Retail Sales Index – Q1 2014
July	2	Survey of Financial Institutions 2013
	9	Business Tendency Survey – Q2 2014
	18	RPI – June 2014
August	14	House Price Index – Q2 2014
	20	Index of Average Earnings – June 2014
September	10	UK/Jersey Price Comparisons – June 2014
	17	Retail Sales Index – Q2 2014
October	1 (p)	GVA and GNI 2013
	8 (p)	Labour Market – June 2014
	10	Business Tendency Survey – Q3 2014
	17	RPI - September 2014
November	13	House Price Index – Q3 2014
	26 (p)	Jersey Annual Social Survey 2014
December	3	Retail Sales Index – Q3 2014
	10	Jersey Economic Trends 2014

(p) provisional

‘Jersey in Figures, 2013’ presents statistics relating to Jersey, Channel Islands, 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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