4insight

Jersey Retail 2023 Report

Perceptions, experiences & needs

Prepared for
Government of Jersey

Contents

About the Research

Executive Summary

4insight is an independent, professional local research agency and was commissioned by the Government of Jersey, to gain views and experiences of retail in Jersey to inform future strategy and policy. A blended approach methodology was used, both initial qualitative focus groups and a quantitative survey, to generate a greater level of insight with a good statistically representative sample size. This research followed on from 4insight's retail research conducted in 2018, to which results have been compared.

Key findings included eliciting shopping behaviours, recent purchases, attitudes, unmet needs and main desires.

The findings showed that the shopping behaviours of the respondents was strongly based on their psychological mindset, rather than any socio-demographics, the respondents were segmented by mind set: Price Pickers, Quality Choosers, Convenience Concerned, Experience Shoppers, Likely Locals and Online Opters.

Insights showed behaviours consisted of buyers shopping on a mix of days and times of the day with the majority using their car. Some combine shopping with activities such as errands, going to cafes or restaurants and socialising, however the majority were unlikely to combine shopping with sport or leisure activities.

Top reasons for choosing a specific location to shop included a specific desired shop, close to where they live or work, parking and the range of shops.

The respondents were asked to consider their most recent purchases, of those, most had purchased from on-island shops, followed closely by online shops which are not Jersey based.

In the last month, the items purchased most on-island consisted of food and groceries, clothing and health & beauty items. Their key reasons for purchasing on-island were receiving the item/s quickly, the ability to test or try/feel the item and the convenience.

Most shop in town and in garden centres for non-grocery items, while grocery items were typically purchased in supermarkets.

The highest average scoring factors in relation to satisfaction of shopping in Jersey, (out of 10) were customer service (6.0), opening hours (5.8) and walk through town experience (5.5). In contrast, the lowest scoring factors for satisfaction were cost of items (3.6), range of shops (3.7) and choice of items (4.1). There were some significant differences to the results in 2018 and they all involved receiving lower satisfactions score, for example cost of items (3.6 down from 4.4), range of shops (3.7 down from 4.9), choice of items in shops (4.1 down from 4.9) and both ease of parking and cost of parking. The overall shopping experience satisfaction had also dropped (5.0 from 5.7).

For those who have recently purchased items online, most had the VAT removed automatically by the retailer, highly favouring brands which do this.

Jersey stores were mostly not perceived transparent on price charged, as 51% perceived “sometimes” Jersey shops are transparent with 29% saying ‘not at all’ transparent and 9% saying ‘always’.

Respondents were still highly interested in Sunday shopping, with 64% in favour, plus 62% would like to be able to shop in early evenings other than just at Christmas.

Discount and promotions, more brands, independent shops and later closing times were the factors that scored highest to encourage more shopping in Jersey.

List of Figures

Research Aim & Objectives

The research aim was to explore consumer views and needs from Retail in Jersey, (residents primarily, however also some visitors) to inform forward Retail strategy and policy.

Specific objectives for the research included exploring views on:

- consumer opinions, regarding the current retail offering, in Jersey … the gaps and opportunities
- how best to strengthen this retail offering, in the future
- what the optimum approach is, in bringing a new, more vibrant, retail offering into being
- what part the Government of Jersey should play, in catalysing this retail development
- comparing results with the findings from the 2018 survey

Scope, Sample & Methodology

A mixed research methodology was utilised to explore views, experiences and shopping behaviours of both qualitative research and quantitative research to enable in-depth insights and a good statistically representative sample of Jersey shoppers.

Initially focus groups were conducted to explore in depth and this was followed by a survey which was available digitally/online in an accessible format, in paper format or by phone.

PHASE 1

Two focus groups with a total of 14 respondents, were first held to gain in-depth understanding of shoppers' perceptions and experiences in Jersey; this insight was also used to inform the survey questionnaire design. All were shoppers with a good mix of demographics such as income, employment, where they work, age, gender and shopping behaviours.
The respondents were invited to take part through 4insight's online panel, of over 3,800, and screened to meet agreed varied criteria. Participants were selected matching their timing availabilities, reflecting the various socio-demographics and different shopping behaviours. The focus groups each lasted about 90 mins and were conducted in 4insight's professional observation studio to allow live viewing.

PHASE 2

A survey was then designed with both structured, semi-structured and open questions. This was carried out to quantify consumer views with the agreed questionnaire being programmed into professional research software and hosted online by 4insight.
Following review and sign-off, of the survey online link, it was fully launched on 7th December 2022 and closed on 6th February 2023.

The survey was promoted by 4insight across 4insight's online panel of 3,800, social media using both paid and organic posts, Chamber of Commerce email newsletter, JEP paper and digital ads, Bailiwick Express digital ads and the Government of Jersey's social media and press release. Certain groups were excluded, such as those currently working in retail, whose views were collected separately through industry representatives.

The scope of this research was with those shopping in Jersey aged 16 or above.

In total 1,731 responses were received from the survey, following data cleaning (removing short partial results, any repeats, flat-lining answers and exclusions), **1,528 total responses** were captured which is a great statistically representative sample size. The sample has a good representation across the various socio-demographics of Jersey shoppers. The resulting data was analysed with cross tabulations being produced to explore any possible differences by demographic or shopper segment. The results were compared with the results from 2018.


Qualitative
Research Results

Consumer Retail Focus Groups Executive Summary

SHOPPING BEHAVIOURS

- On-island purchases mainly food & essentials
- Desire to buy local, however unable due to rise in inflation

Online:

- On average, 44% of the respondents' purchases are online
- Pros: Cheap/ discounts, choice, convenience
- Cons: Impact on the economy, postage charge increasing

SHOPPING POSITIVES

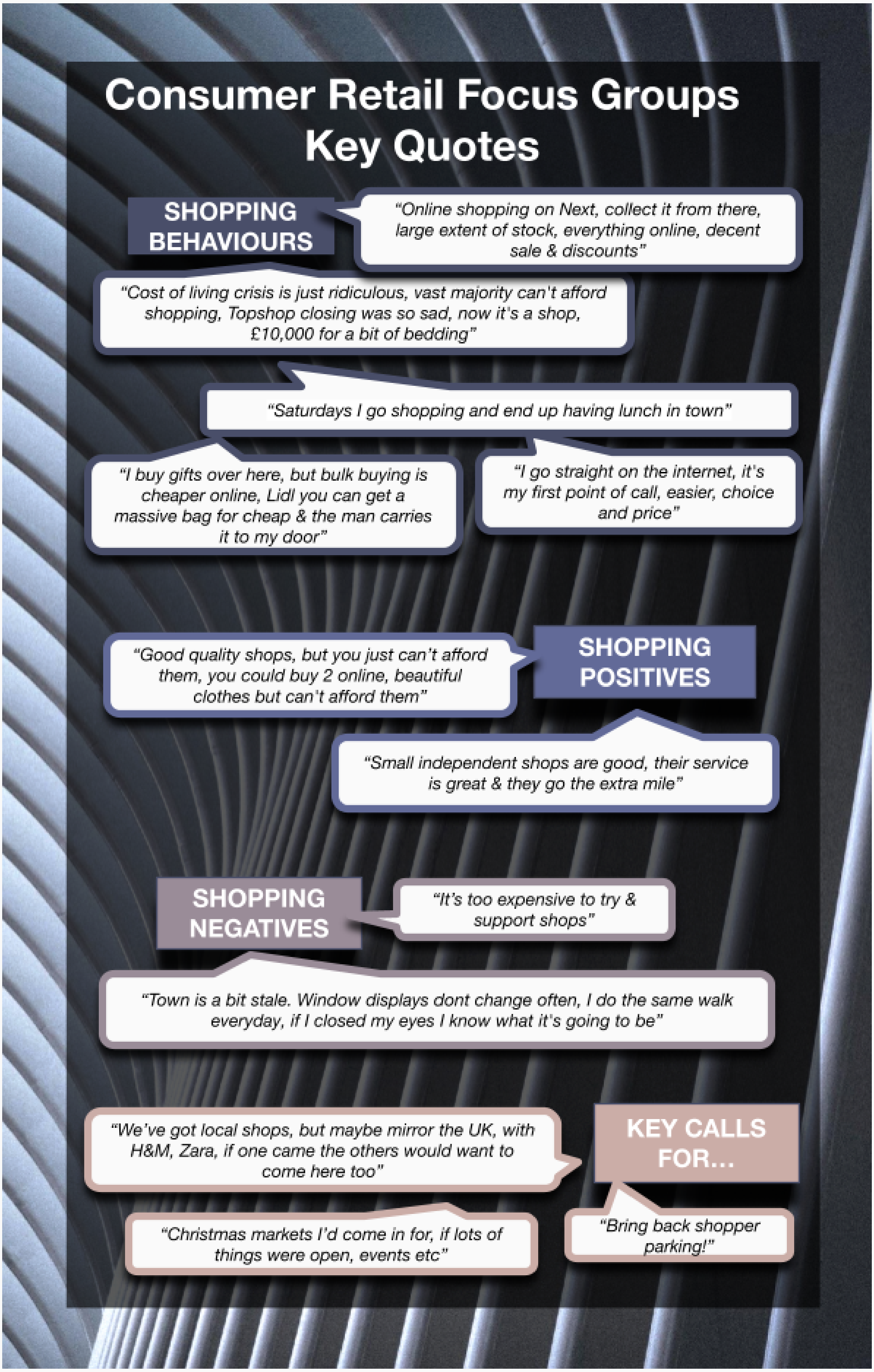
- Instant
- Customer service
- Incorporation with other errands e.g. post office, meeting friends, going for lunch

SHOPPING NEGATIVES

- Overall lack of choice
- Expensive, but high quality
- Opening times inconvenient
- Lack of convenience e.g. parking

KEY CALLS FOR...

- Larger brands/retail stores
- Opening times to reflect working hours/Sunday opening
- Events
- More parking
- Better value for money and choice


Consumer Retail Focus Groups
Key Quotes
SHOPPING BEHAVIOURS
"Online shopping on Next, collect it from there, large extent of stock, everything online, decent sale & discounts"
"Cost of living crisis is just ridiculous, vast majority can't afford shopping, Topshop closing was so sad, now it's a shop, £10,000 for a bit of bedding"
"Saturdays I go shopping and end up having lunch in town"
"I buy gifts over here, but bulk buying is cheaper online, Lidl you can get a massive bag for cheap & the man carries it to my door"
"I go straight on the internet, it's my first point of call, easier, choice and price"
SHOPPING POSITIVES
"Good quality shops, but you just can't afford them, you could buy 2 online, beautiful clothes but can't afford them"
"Small independent shops are good, their service is great & they go the extra mile"
SHOPPING NEGATIVES
"It's too expensive to try & support shops"
"Town is a bit stale. Window displays dont change often, I do the same walk everyday, if I closed my eyes I know what it's going to be"
KEY CALLS FOR...
"We've got local shops, but maybe mirror the UK, with H&M, Zara, if one came the others would want to come here too"
"Bring back shopper parking!"
"Christmas markets I'd come in for, if lots of things were open, events etc"

First words; “Expensive” & “Lack of choice”

One qualitative research projective technique utilised was ‘first words’ where focus group participants are encouraged to write down on their self completion sheets individually the first words or phrases that come to mind when the moderator says *“Retail in Jersey”.* These are then collated and clarified in the group setting. The main associations were ‘expensive’ and ‘lack of choice’.

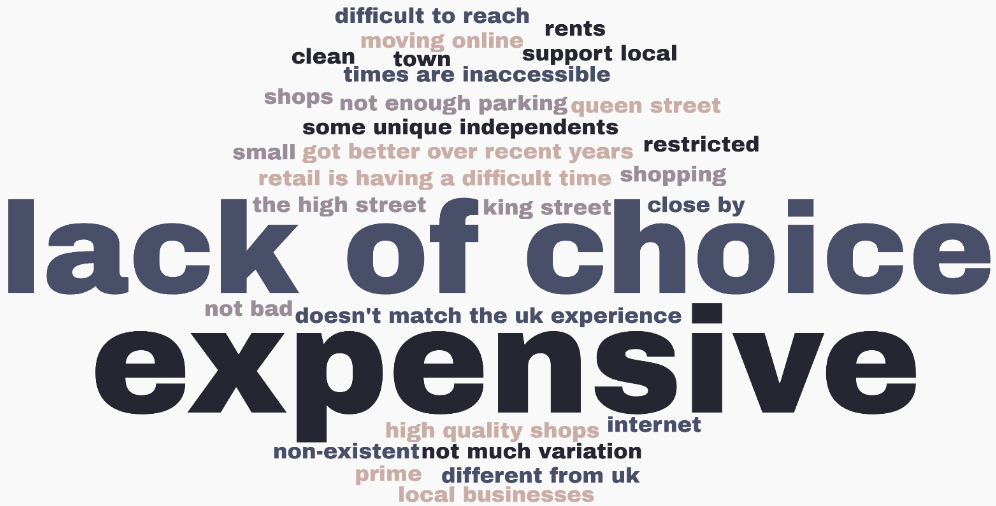


Fig. 1. Focus group first words[n=14]

Type of items bought in Jersey

- Food
- Quick essentials
- DIY and home improvement items
- Clothing, shoes, trainers
- Electronics try out in-store, some then buy online
- Mix of white goods online and in Jersey

Groceries mostly bought in supermarkets for:

Fig. 2. Focus group - key drivers when shopping

- Overall most use supermarkets for grocery shopping, this was due to convenience, more choice, quality for price
- A negative was the use of lots of packaging and plastic
- Farm shops perceived great quality, less packaging, however much more expensive
- Most using car for transport when grocery shopping
- Negative mentions of Tesco products no longer available within Alliance, despite Guernsey still having Tesco products available
- Perceived monopoly of Sandpiper here (eg M&S, plus offers not honoured here). Perception that groceries here are much more expensive than in the UK where there is Aldi, Lidl and Asda. Many mentioned that here Waitrose and M&S are now cheaper than the Co-op, plus have better quality of fruit and veg

"I couldn't afford M&S in UK, living here now I feel like I have to"

"Penalised for living here, deals in UK not applicable to Jersey"

"Alliance has Waitrose products, but it's actually cheaper in Waitrose than in Alliance"

"Sandpiper is so detrimental, such a monopoly"

Impacts on shopping in Jersey:

- Online
- Cost of living
- Covid-19
- Digital aspects
- Price transparency

Fig. 3. Focus group - impacts on shopping

ONLINE SHOPPING

- Large increase in online buying behaviour, on average, 44% of the respondents' purchases are online
- Pros: Large price difference (mostly cheaper), discounts or sales, click & collect if item unavailable in-store, sometimes quicker than going into a shop & getting onto stock waitlist, delivery to doorstep, convenient
- Cons: Impact on the economy, postage charge increasing, difficulty with VAT being taken off. Great if automatic - e.g. Amazon and eBay

COST OF LIVING

- Overall perceived a huge impact on shopping behaviours, especially as many feel prices are going up
- Many can't afford to buy local, so instead buy more online
- Buying more "own brand" items instead of branded, buying much less "treats" & more bulk buying and cooking
- However, those living alone perceived the impact much less

COVID-19

- Increase of shopping during lockdown as many weren't going out, so enjoyed receiving online shopping parcels

DIGITAL ASPECTS

- Some using click and collect as items are either cheaper or in stock online.
- Click and deliver liked (white goods) e.g. Powerhouse having good deals, delivery slots too
- Self service great, however sometimes unreliable
- Only a few aware of/using Consumer Council comparison App; perceived out of date/ sparse content
- Calls for: QR to scan what's in stock e.g. a certain shoe or size, click & collect machine, without queuing

PRICE TRANSPARENCY

- Lack of transparency, desire for more price comparisons, justification of price increases
- A few mentions of Waitrose items in Alliance being more expensive than in Waitrose stores, despite exact same product and brand

SHOPPING POSITIVES

- The main positive of shopping in Jersey is being able to have the item instantly
- Another key positive was being able to see/touch/try the item, before purchasing
- Customer service for example when you need assistance such as setting up a new phone, majority find customer services in Jersey friendly and helpful, however a few felt the need for more training
- Incorporation with other errands e.g. post office, meeting friends, going for lunch
- Many using the markets, perceived very positive however for some expensive

SHOPPING NEGATIVES

- Overall perceived lack of choice and range of items
- All perceived shopping in Jersey as very expensive, but with high quality
- There was a large desire to buy locally and support the economy, however respondents felt this was unrealistic due to high cost
- Perception that a lot of shops are closing down, expressed as depressing by some
- The introduction of luxury department store Flannels was perceived unrealistic for Jersey, especially with current living cost increases
- Some compared town to cities such as Liverpool, Manchester and London; extensive choice and value for money, in one location
- Old stock often in stores e.g. New Look in-store compared to online
- Appreciation of smaller population and less demand, therefore a vicious cycle of less choice
- Loss of multipurpose department stores, e.g. Woolworths, BHS negative, perceived as having everything needed for affordable prices. Voisins and De Gruchys perceived too expensive and unattainable for some. UK stores liked; Zara, H&M, John Lewis
- Landlords perceived to charge high rents, creating lack of appeal for more brands to have shops in Jersey

Parking & opening times key barriers

A large barrier for the respondents shopping in Jersey was the perceived struggle with parking - finding somewhere to park, plus cost. Some mentioned that the St Helier Connetable “keeps taking parking away”. Some perceived town as too spread out, e.g. Sand Street to Colomberie. A few were happy with the proximity and amount of quality shops. Lack of convenience of opening times was also deemed a downside, especially for those who work until 5:30pm, are unable to get to the shop before they close. Also perceiving town to be too crowded and busy at lunchtimes, so many would avoid this time.

KEY CALLS FOR…

- Larger brands/department stores, more choice of brands and items. Larger brands such as Zara, H&M, Primark could offer better choice and prices, however lots of discussion over whether this would be practical from a demand/economic perspective
- Events and entertainment to attract islanders, created a more attractive atmosphere
- More shopper parking, accessible and cheaper
- Better value for money items
- Opening times to reflect working hours, e.g. opening later in the morning and much later in the evening, even if just a Thursday evening. Maybe even closing on a Monday as many work from home then
- Sunday opening
- Garden centres open on Sundays
- Markets open for longer hours, especially Thursday afternoons

Five L's - projective technique eliciting perceptions

Respondents were asked to individually complete an exercise where they write down one aspect for every 'L', what they Love, Like, Live with, Lament and Loathe, about shopping in Jersey. The top factors which are "loved" are the instance of retaining an item, close proximity in town, the ability to feel and see the item before buying it and some mentioned the overall experience. The factors which were most mentioned as "loathed" were price, choice of items/ shops and parking issues such as availability and cost.

Five L's - *Write down the aspects of shopping in Jersey that you Love, Like, Live with, Lament and Loathe*

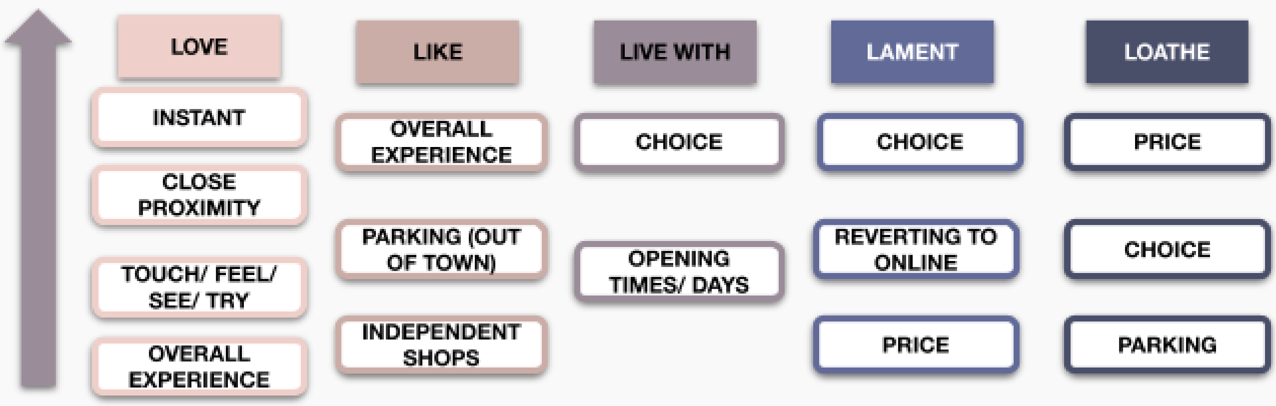


Fig. 4. Focus group Five L's [n=14]

Sentence completion - projective technique eliciting key values and desires

This activity involved respondents individually writing down how they would finish two sentences.
The first sentence, "I value retail in Jersey for…", was mostly completed with mentions of local produce, close proximity, independent shops and customer service.
The second sentence, "One thing that would make me shop more often is…", was mostly completed eliciting the availability of more choice of items and shops, more affordable prices, information such as what's in stock and more convenient opening times.

Fig. 5. Focus group Value [n=14]

Fig. 6. Focus group encouragement to shop [n=14]

Perceived responsibility lies with Government and States Assembly to improve retail in Jersey

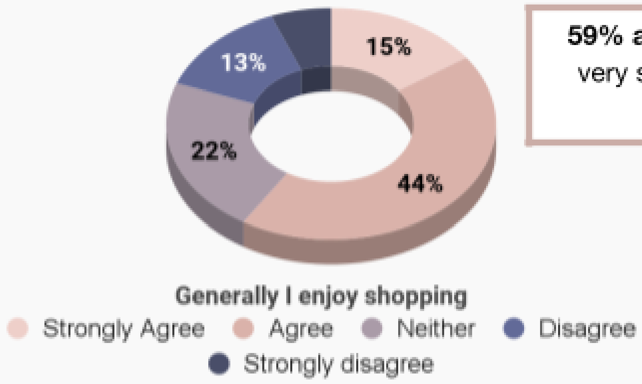
Most perceive the Government and politicians have the most responsibility and power to improve retail in Jersey. They then felt that once the Government implements changes, retailers can choose to open different hours, different days etc. A few felt that landlords have a large responsibility as they charge too much for rental spaces, deterring shops from opening. Driven by staff too, must be able to have staff willing to work on Sundays. All change opening times so it's less confusing, shops talk to each other.

Quantitative Research Results

Attitudes & Mindsets

Attitudes toward shopping

Attitudinal questions were asked within the survey to gain an understanding of key shopping perceptions. Results showed that most enjoy shopping (59%) & majority perceive Jersey as a safe environment to shop in (79%).



59% agreed that generally they enjoy shopping, very similar to the response from 2018, with 56% agreeing that they enjoy shopping

Overall, respondents felt Jersey is a safe environment for shopping, with 79% agreeing. 2018 results showed a slight greater perception of safety, with 81% agreeing

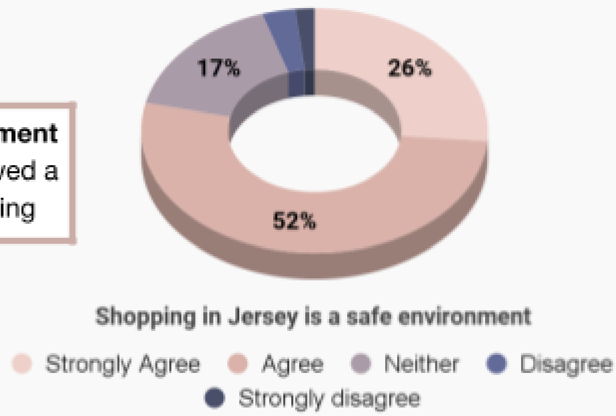


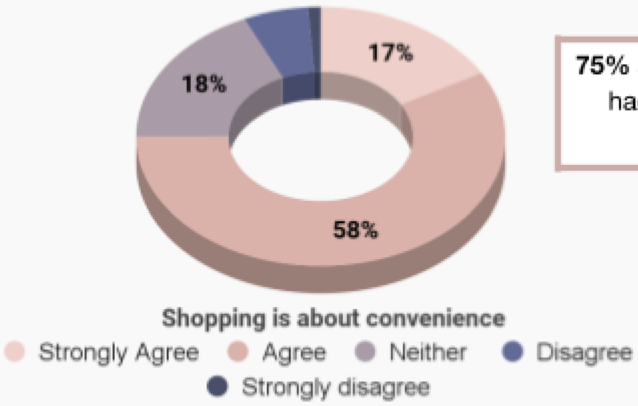
Fig. 7. Attitudinal statements [2022 n=1498]

Types of shoppers

In 2018, the qualitative discussions identified four key mindsets/shopper segments with different shopping motivators in the island. These included; the Experience shopper, the Convenience shopper, the Economic shopper and the Loyal shopper. In comparison, in the 2022 qualitative discussions, these mindsets were more prevalent with key drivers based around price, choice and convenience. In 2022 the key shopper segments were identified and named as: Quality Choosers, Convenience Concerned, Experience Shoppers, Price Pickers, Likely Locals and Online Opters.

Results showed that:

- There was an increase in agreement that shopping is about getting a low price, compared to 2018
- High quality and convenience continuing to have key importance
- Half of respondents agreed that shopping is about the experience
- There was a mixed preference for shopping locally versus online



75% agreed that shopping is about convenience, it had slightly higher importance in 2018,with 82% agreeing

Difference by income

81% of those earning £150k+ perceive shopping is about getting high quality, and 67% perceive shopping is about the experience

High quality had key importance for respondents in both surveys, 72% agreed in 2022, and 79% agreed in 2018

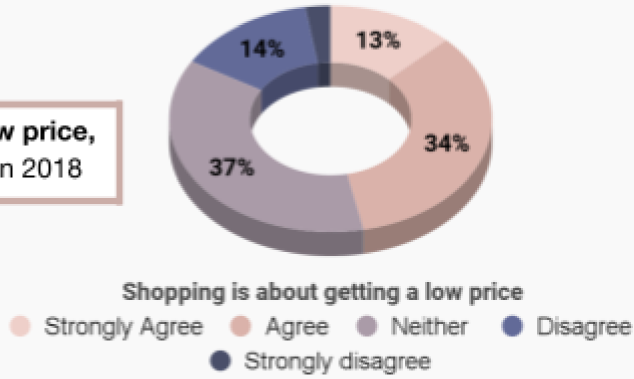
Fig. 8. Type of shopper statements 1 [2022 n=1498]

50% of respondents **feel shopping is about the experience,** whereas 44% agreed in 2018

47% feel that shopping is about getting a low price, whereas 38% of respondents selected agree in 2018

Difference by income

69% of those earning under £20k perceive shopping is about getting a low price



There was a **mixed preference for shopping locally versus online,** with 37% of respondents prefer shopping online, 34% prefer locally shopping, and 30% neither agree nor disagree. There were slight differences compared to 2018, with 38% preferring to shop locally, 33% preferring online and 28% neither agreeing nor disagreeing

Difference by age

56% of those aged 75+ preferred shopping locally than online

Fig. 9. Type of shopper statements 2 [2022 n=1498]

Shopping profiles

Based on the attitudinal questions, results could be filtered to elicit key profiling and segmentation of each mindset's behaviours and perceptions: Quality Choosers, Convenience Concerned, Experience Shoppers, Likely Locals, Price Pickers and Online Opters.

Fig. 10. Shopping profile relativities

Convenience Concerned

Who:
Convenience Concerned shoppers are more focused on shopping in a timely and easy way.

Behaviours
Main drivers for choosing a specific shopping location were parking availability, en-route to destination or close proximity to work/ home.

Key drivers:

- When shopping in Jersey, ease, cost and range.
- When shopping online, product information available, ease of exchange/ returns & to avoid crowds. Less likely to combine shopping with cafes/ restaurants and socialising.
- Generally scored satisfaction with customer service in Jersey lower than the average.

To encourage more shopping in Jersey…
More online possibilities such as click and collect or buy local with delivery, or stores ordering out of stock items.

Quality Choosers

Who:
Quality Choosers are the shoppers who based their shopping behaviours on quality of items.

Behaviours:

- Tend to travel by bike, walk or receive a lift from friends/ family when shopping, preferring to shop after 5pm.
- Decision for choosing a specific shopping location based on unusual/unique shops, the atmosphere & the range of cafes.

Key drivers

- When shopping in Jersey, the range of items to choose from, supporting local and receiving customer service.
- Their reasons to decide to shop online would be product information provided, user-friendliness and ease of return/ exchange.

To encourage more shopping in Jersey…
Mixed, however top drivers markets/ pop-up stalls, street food fairs & alfresco areas.

Experience Shoppers

Who:
Experience Shopper tend to enjoy the overall experience of shopping and usually combine it with socialising and eating out.

Behaviours:

- Higher preference for weekend shopping, from 12pm-2pm
- Decision for shopping location based on atmosphere, unusual/unique shops, and the range of cafes and shops.

Key drivers:

- When shopping in Jersey, range of items to choose from, receiving customer service & ease of shopping.
- When shopping online, lack of availability of items on-island.

To encourage more shopping in Jersey…
More interactivity & longer hours, e.g. more alfresco areas, street food fairs and events, plus later opening hours and Sunday opening.

Price Pickers

Who:
Price Pickers are typically looking for the cheapest offers and deals, most impacted by the rising cost of living.

Behaviours:

- Higher preference to shop after 5pm, key decision factors for choosing location to shop were parking, price & if en-route to their destination. Recently bought food and groceries were purchased either in town or at the Les Quennevais precinct.
- Price Pickers often didn't combine shopping when working in town or when doing leisure activities, occasionally with socialising and errands.
- A higher proportion of Price Pickers had recently shopped for food online, both local and off-island stores.

Key drivers:

- When shopping in Jersey, promotions and deals, cost and range
- When shopping online, promotions/ deals, cost and ease of return/ exchanges.
- Generally scored cost of item in Jersey much lower than the average.

Encouragement to shop more in Jersey:

- More discounts/ promotions, more online click & collect in-store & online local shopping with delivery.

Online Opters

Who:
Online Opters are the shoppers who's first intention when buying an item is to look online.

Behaviours:

- Higher preference for shopping on weekdays
- For non food/ grocery products, most recently bought items from online shops, online click and collect in Jersey shops and shops off-island. For food/ grocery products, they shop in Jersey online stores and off-island online stores. When choosing a specific location to shop, key factors are parking price and close proximity to work.

Key drivers:

- When shopping online, user-friendliness, overall ease and ease of returns/exchanges and promotion/deals available.
- When shopping in Jersey, promotion/deals, receiving the item quickly or convenience.
- Generally scored their satisfaction of shopping in Jersey as much lower than average for choice of items, range of shops and cost.

To encourage more shopping in Jersey…
Improved convenience, mostly online local shopping with delivery or in-store collection or improved opening times and Sunday opening.

Likely Local

Who:
Likely Local are the shoppers who prefer to buy local produce and buy from local shops.

Behaviours:

- High preference for local and online local shops, preferring shopping at lunchtime. Factors when choosing a specific shopping location, atmosphere, open spaces and unusual/unique shops. Usually walking, taking the bus or cycling

Key drivers:

- When shopping in Jersey, support local, receive customer service & knowledge about products, & the ease of shopping on-island.
- When shopping online, item unavailable in Jersey & product information received.

To encourage more shopping in Jersey…
Market/pop-up stalls, more alfresco areas, street food fairs, events & independent shops.

Shopping Behaviours

Preference for time and days

Respondents were asked if they preferred weekdays, or weekends to shop, **however 44% had no preference**, followed by weekdays (36%), and weekends (20%). These results are very similar to those from 2018, no preference (42%), weekdays (39%) and weekends (19%).

Fig. 11. Day preference for shopping [2022 n=1216]

Difference for those who mix work location
*63% of those who **mix working from home & outside of town**, have no preference in weekdays or weekends to shop*

With regard to their **average preference of time in the day to shop, 9am-12pm was the most popular (28%)**, 12-2pm was second highest preferred (23%) and 21% had no preference.

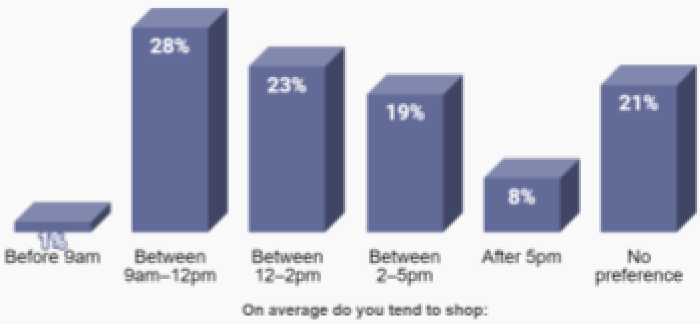
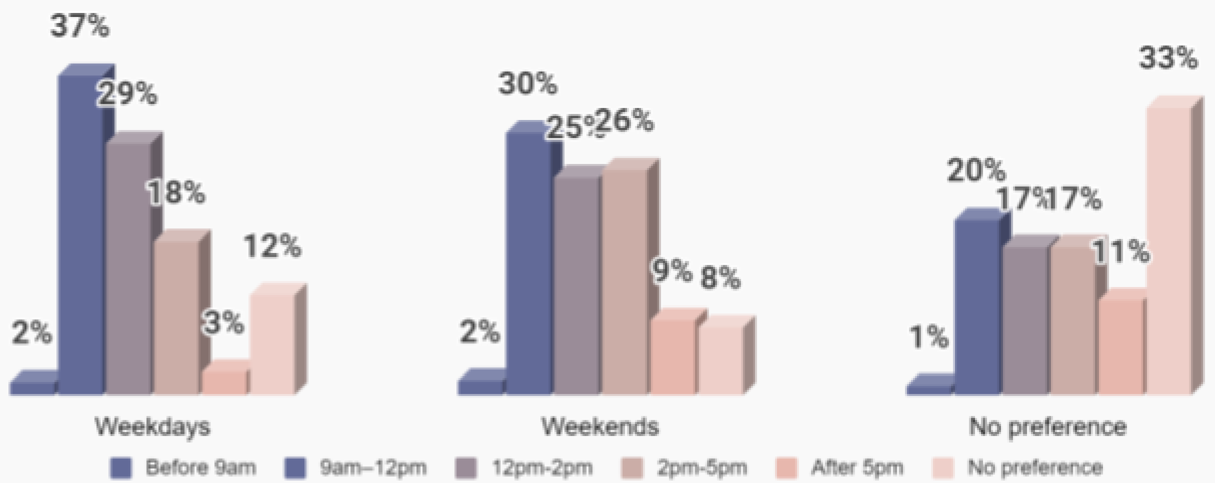


Fig. 12. Time preference for shopping [2022 n=1216]

Difference by age
*Those **aged between 16-44** were more likely to shop between 12-2pm, whereas those **aged 65+** prefer 9am-12pm*

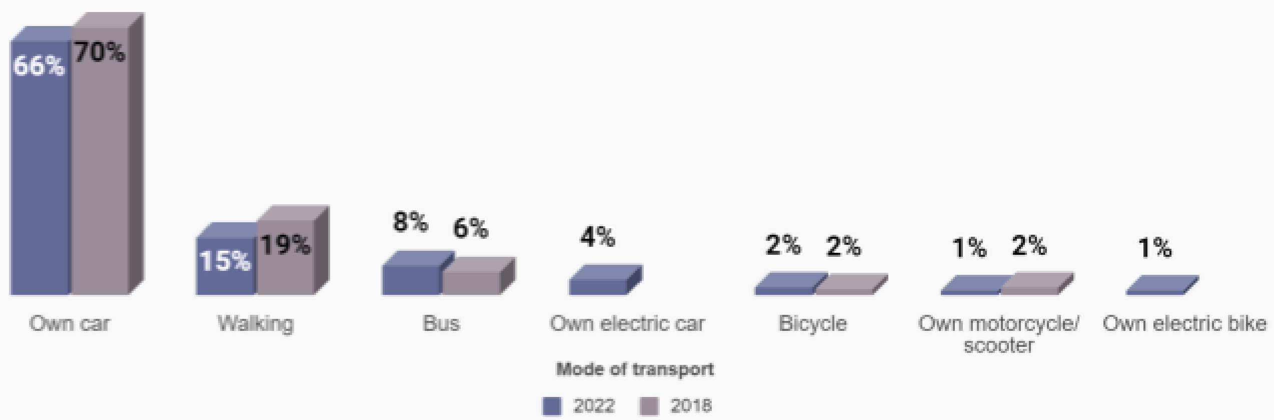
Difference by working from home vs outside of town
*Most of those who **mostly work outside of town** prefer 9am-12pm. Most of those who **work mostly in town** prefer 12-2pm.*



Comparing both days and times, the most popular preference for shopping is **weekdays or weekends at 9am-12pm,** otherwise many had no preference for either

Fig. 13. Day vs time preference for shopping [2022]

Mode of transport when shopping

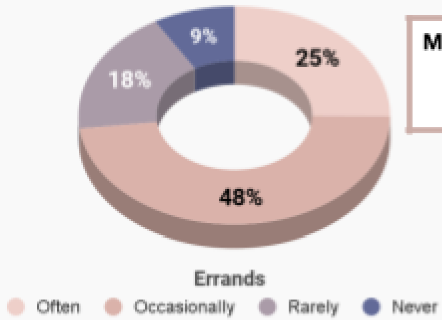


Most continuing to prefer using their own car for their mode of transport when shopping

Fig. 14. Transport when shopping [2022 n=1322]

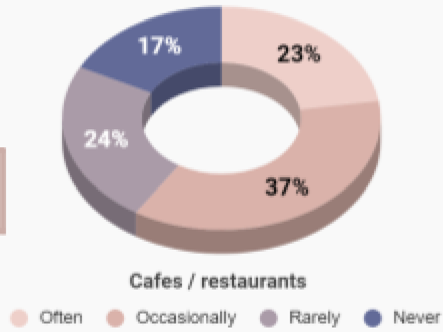
Combining activities with shopping

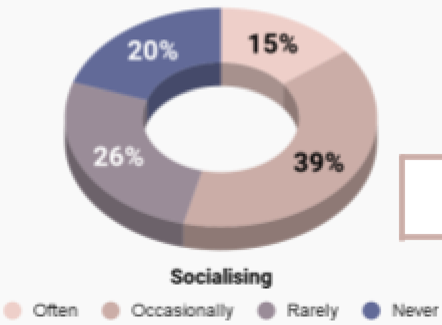
Most respondents (73%) combine shopping with errands, 59% with cafes/ restaurants, 54% with socialising, 50% when working in town, however only 24% combine shopping with leisure/ sport activities.



Most respondents (73%) **combine shopping with errands** such as going to the post office or the bank, similar to 2018 results (76%).

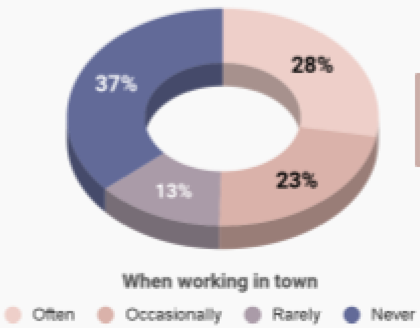
59% combine shopping with going to cafes/restaurants while out shopping, 54% in 2018.





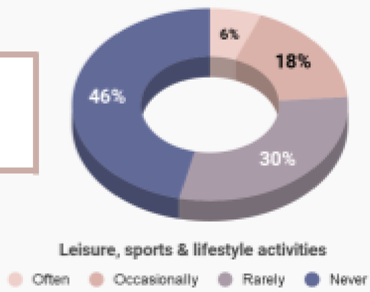
Half of the respondents combine shopping and socialising with friends and family.

Fig. 15. Combining activities 1 [2022 n=1314]



Half of the respondents combine shopping with working in town such as being on their lunch break.

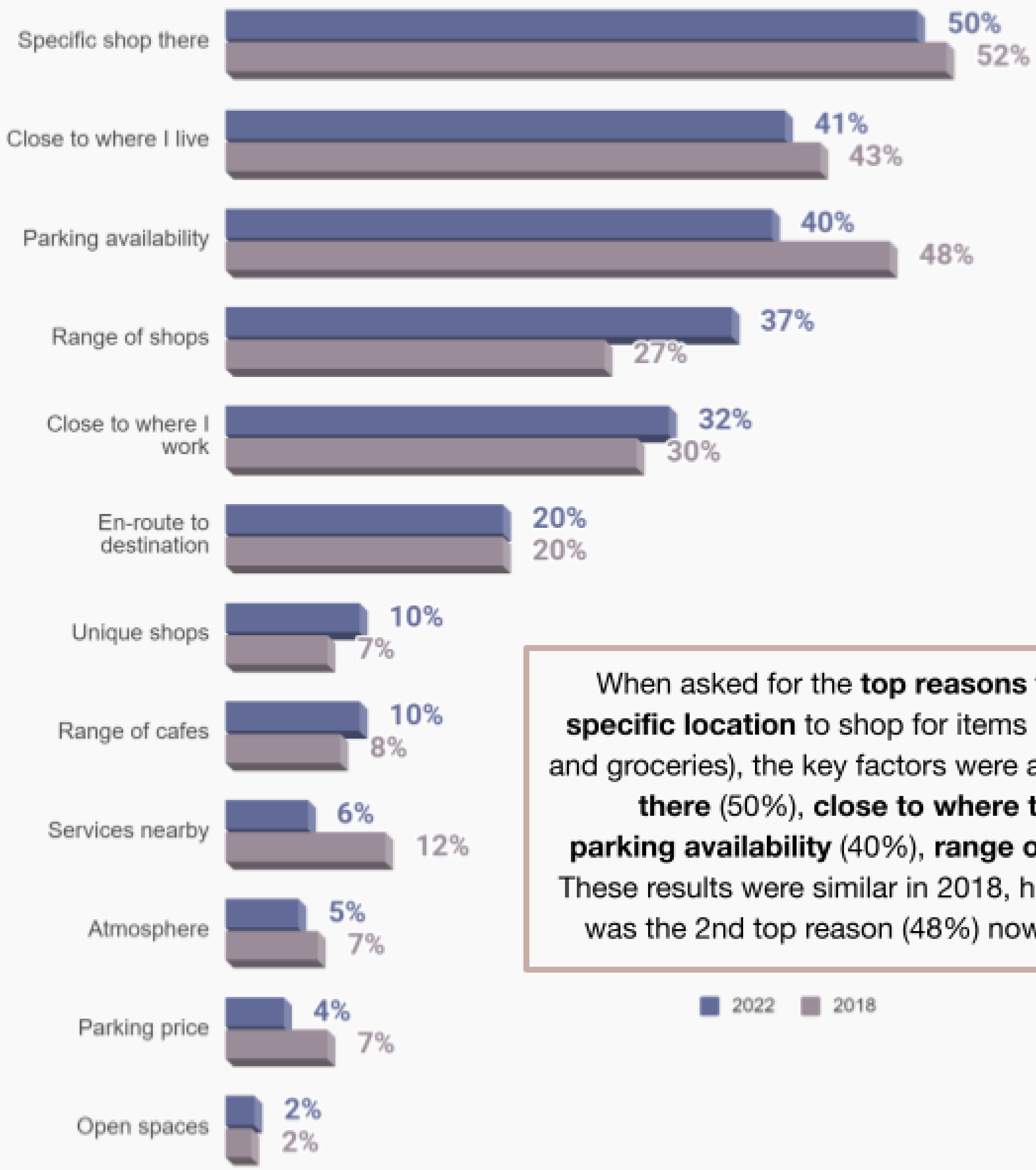
Very few respondents combine shopping with leisure sports and lifestyle activities, with 46% choosing "Never", similar to 2018, (40%).



Difference by gender
*64% of **females** would combine shopping with cafes/ restaurants*
*59% of **females** would combine shopping with socialising*

Fig. 16. Combining activities 2 [2022 n=1314]

Specific shopping location



When asked for the **top reasons for choosing a specific location** to shop for items (excluding food and groceries), the key factors were a **specific shop there** (50%), **close to where they live** (41%), **parking availability** (40%), **range of shops** (37%). These results were similar in 2018, however parking was the 2nd top reason (48%) now down to 40%.

Fig. 17. Specific Shopping location [2022 n=1253]

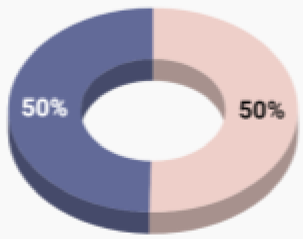
Difference by age
*For those **aged 16-44**, their top choice for location was close to where they live*

Difference for working outside town & in town
*For those **working outside of town,** their top reason was parking availability*
*63% those who selected "Close to where I work" **mostly work in town***

Difference by income
Those with lower annual household incomes prefer shops close to where they live, vs those with higher incomes prefer close to where they work or a specific shop

Technology awareness and usage

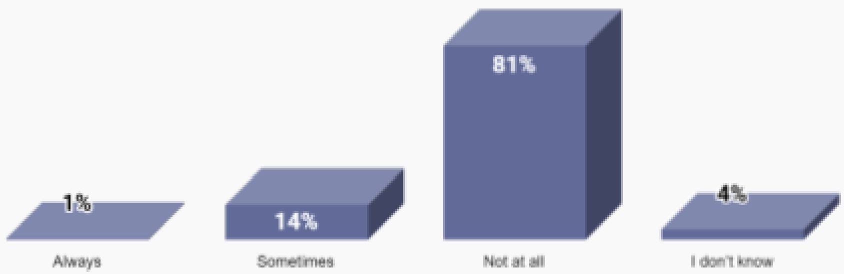
Respondents were asked about their awareness and use of the **Jersey Consumer Council price comparison app, findings showed only half (50%) of the respondents were aware of the app,** and only 15% have used it.



Difference by age
*Those **younger** were much less likely to have heard of the app and newsletter*

Have you heard of the Jersey Consumer Council's price comparison app?

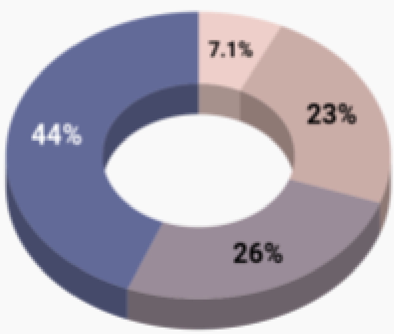
Yes No



Before going food/grocery shopping do you use the Jersey Consumer Council app to compare prices?

Fig. 18 Jersey Consumer Council's app & use [2022 n=1304 & n=1159],

When asked about awareness and use of the **Jersey Consumer Council newsletter, 44% have never heard of or read it**, 26% have heard of it but don't read it, 23% perceive it useful and 7% always read the newsletter.



How useful do you find the Jersey Consumer Council newsletter?

Always read Useful Heard of it, don't read Not heard of it, never read

Fig. 19. Jersey Consumer Council newsletter [2022 n=1303]

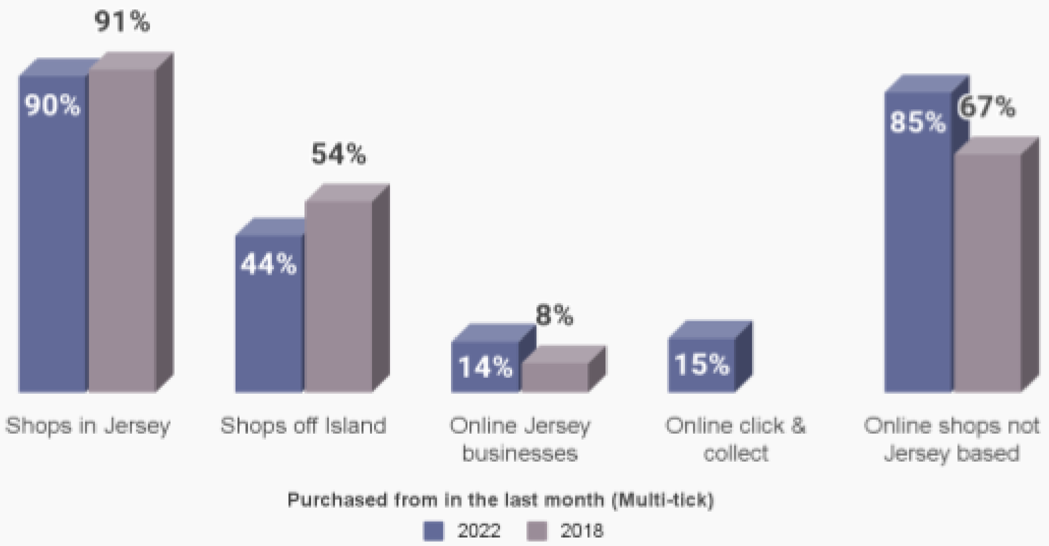
Respondents were then asked about their self-checkout and in-store technology usage. 52% sometimes use self checkout/ technology, 33% always and 15% don't use it at all.

<u>Difference by age</u>
*Almost half of those **aged 16-24** "Always" use in-store tech*

Fig. 20. Self check-out & in-store technology [2022 n=1308]

Recent Purchases

Respondents were asked specifically about the items they have bought in the last month, 90% purchased from shops in Jersey, followed by 85% have recently purchased from online stores which are not Jersey-based. Just under half (44%) have bought items off island, and only a few have purchased from online Jersey shops and online click and collect. Results compared to 2018 show a 20% increase in online purchases from stores not based in Jersey, a 6% increase from online Jersey based business and a 10% decrease in off-island purchases.



Difference by income

Only 67% of those earning under £20k shop on online shops not based in Jersey, vs 94% of those earning £150k+ do

Fig. 21. Recent purchases in Jersey [2022 n=1303, 2018 n=1076]

% **The average percent of spend online per month (excl. food/ groceries) was 50%**

% **The average percent of food/ grocery spend per month was 14%**

Fig. 22. Spend percentages [2022 n=1231, n=1190]

Of those purchases, the most common items were food/ groceries (93%), clothing and footwear (67%) and health and beauty items (62%).

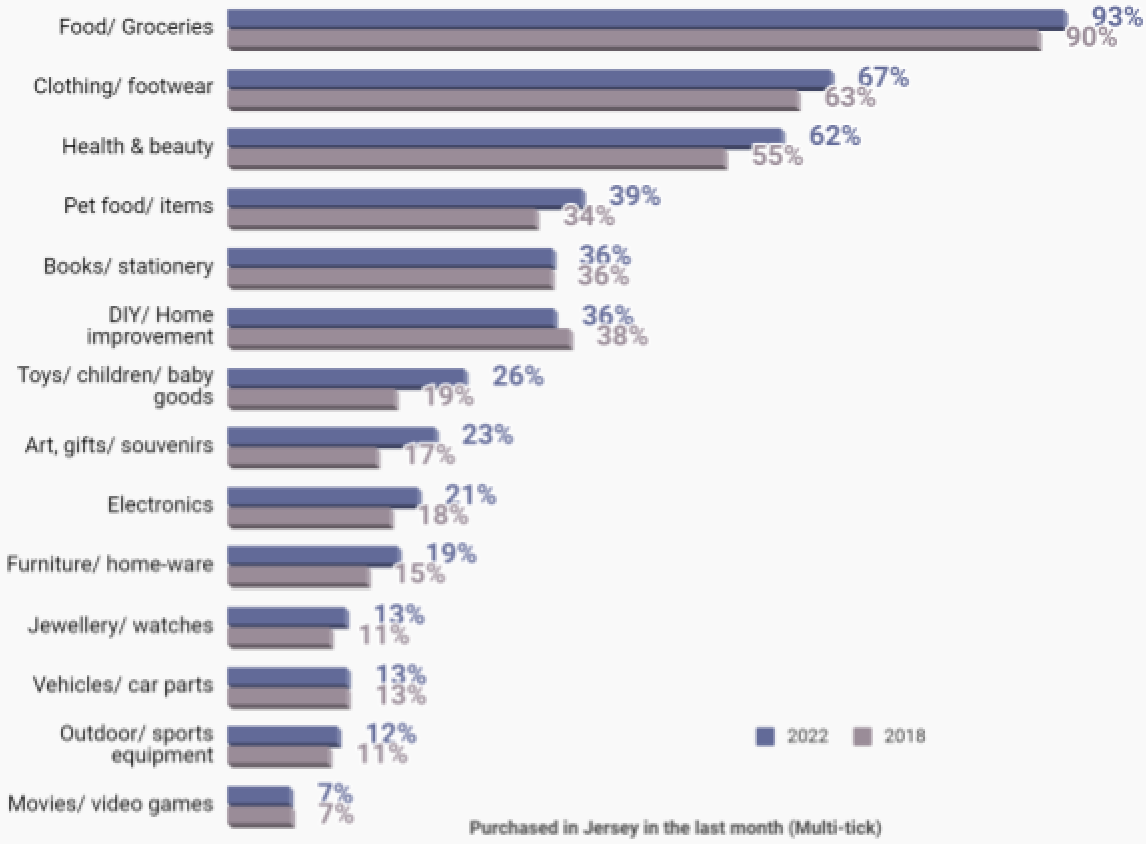


Fig. 23. Items purchased in Jersey [2022 n=1327, 2018 n=982]

Of the items purchased on-island in Jersey, 70% perceived the items were available online. When comparing the items purchased on-island, to whether the shoppers perceived the item was available online, outdoor and sports equipment was the highest perceived item to be available online, however bought in Jersey instead (82%).

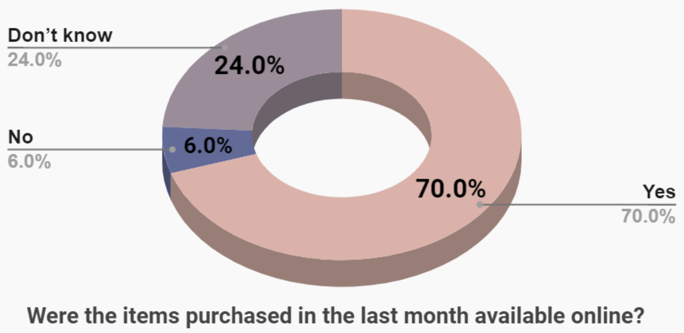


Fig. 24. On-island purchases available online [2022 n=1255]

In the last month, excluding any food or grocery purchases, the most used locations for shopping were St. Helier town centre (83%), garden centres (50%) and B&Q/ Powerhouse &

Sports Direct (46%). The least used were St. John's Retail Park (1%), Gorey and St. John's Village (both 5%).

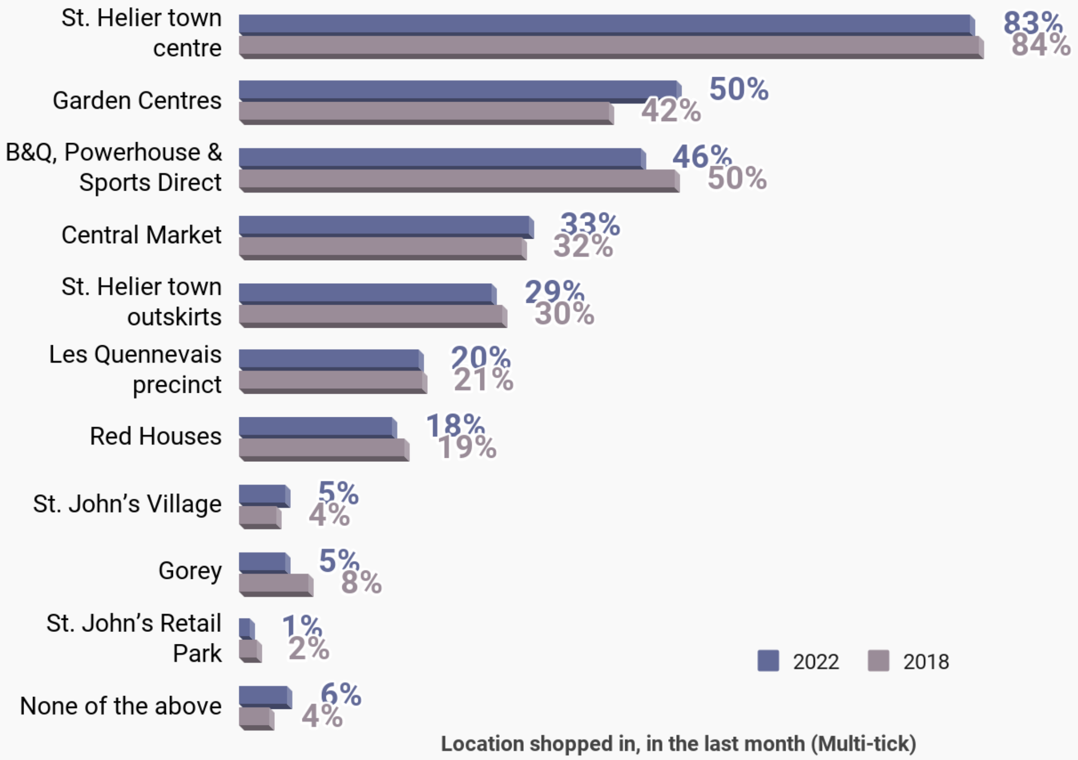


Fig. 25. Location shopped in [2022 n=1328, 2018 n=931]

Difference by work location

*Most of those **mostly working from home** have shopped in garden centres in the last month*

If respondents had not shopped in St. Helier town centre in the last month, they were asked for reasons why this was. The most mentions comprehended the expense of the items in St. Helier, perceiving them too high and unaffordable. Another key factor was the lack of parking and furthermore the high cost of parking in town. Additionally, the lack of choice of items in town was suggested to be poor by many. This contrasts with 2018, as lack of choice was the respondents' main reason, followed by parking.

Fig. 26. Reasons for not shopping in St. Helier town centre [2022 n=109]

Online purchases

The most purchased items online in the last month were clothing/ footwear (75%), health and beauty products (53%), food and groceries (45%) and books and stationery (43%). In comparison to the results from 2018, there was a big increase of items purchased online for food and groceries items (+13%), also an increase for art/ gifts & souvenirs and toys, children and baby items (+9%), health and beauty products and pet food and items increased (+8%). The largest decrease in items bought online compared to results from 2018 were, electronics (-7%), book and stationery, and movies and video games (-6%).

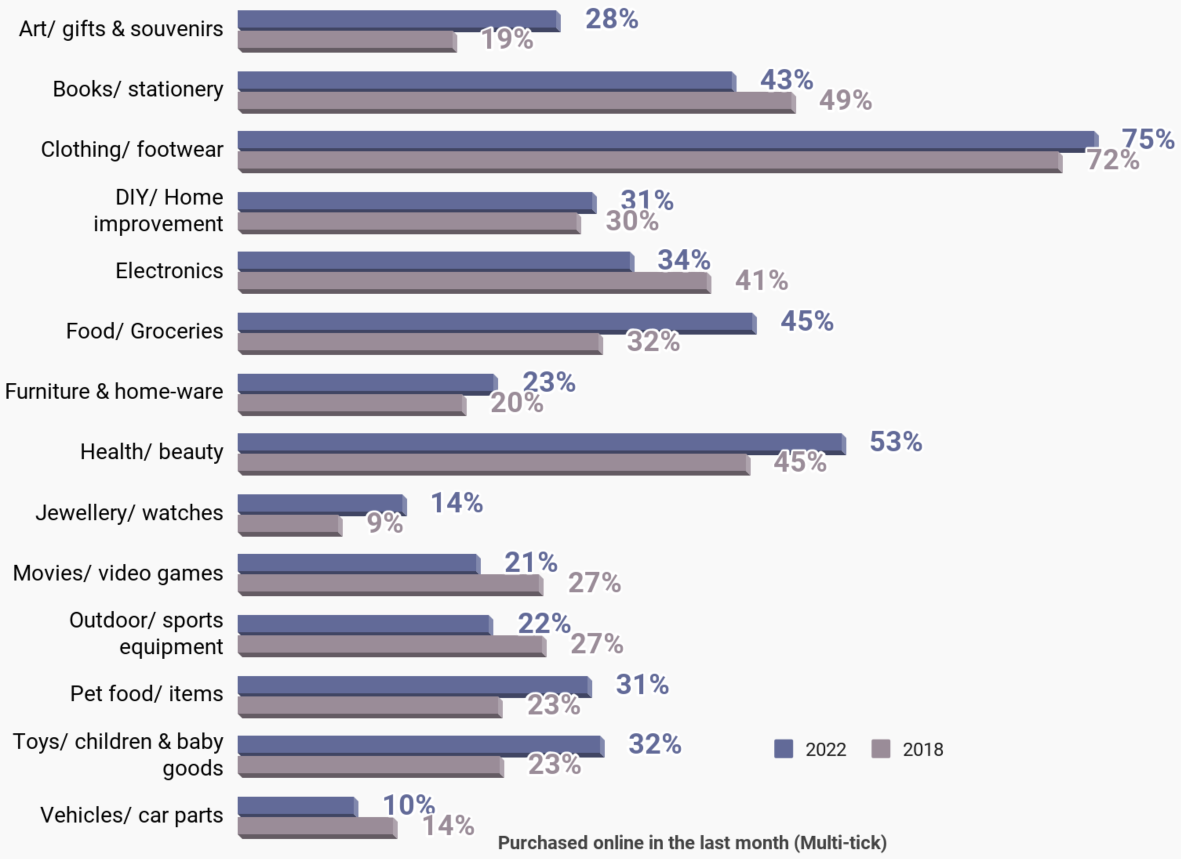


Fig. 27. Items purchased online [2022 n=1167, 2018 n=643]

Of the items purchased online, 47% perceived the item was available in Jersey, a much lower percentage than perceiving items are available online. When comparing the items purchased online, to whether the shoppers perceived the item was available in Jersey, pet food and items were the highest for being purchased online despite available in Jersey (57%), followed by food and groceries (54%), DIY and home improvement items (54%) and electronics (53%).

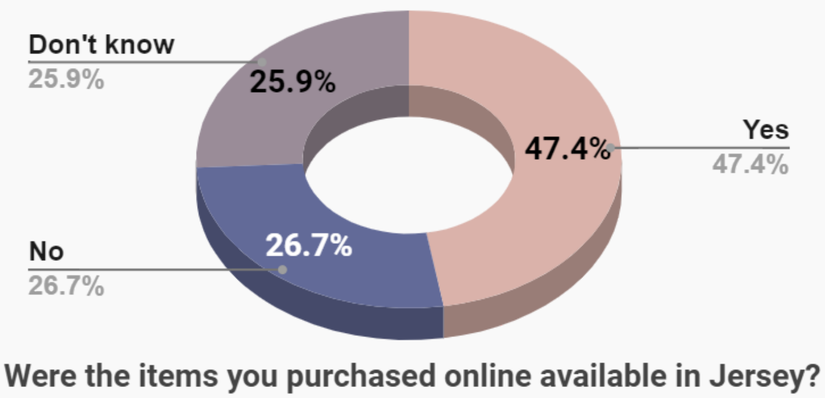
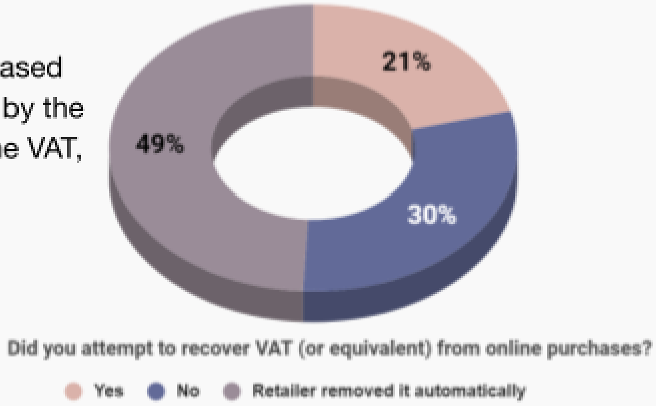
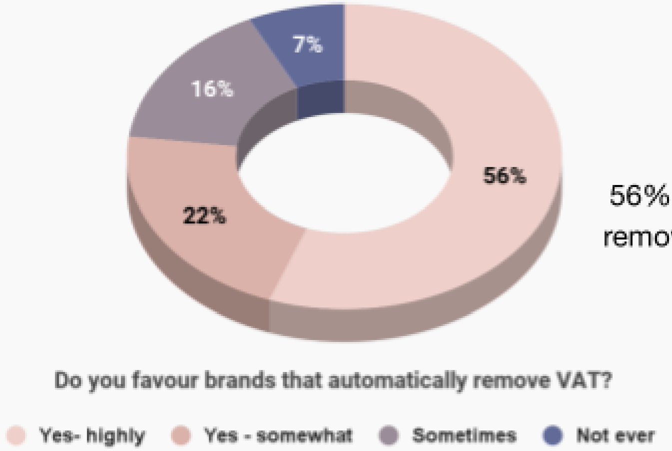


Fig. 28. Items purchased online available in Jersey [2022 n=1186]

VAT on purchases

Nearly half of the respondents who have purchased items online had the VAT automatically removed by the retailer (49%). 30% did not attempt to recover the VAT, whereas 21% did attempt.





56% highly favour brands which automatically remove VAT, 78% generally value, and only 7% don't ever.

Fig. 29. Recovering VAT & if favour [2022 n=1171]

Food and grocery purchases

In relation to food and grocery purchases in the last month, the most used locations to shop were St. Helier town centre (61%), town outskirts (47%), the Central Market (35%) and Red Houses (30%).

Difference by age

More than half of those aged 55+ had shopped in farm shops, vs only 25% of 16-24's had
Higher usage of convenience stores by those aged 16-55

Fig. 30. Shopping locations for food & groceries [2022 n=1161]

The most used shops were supermarkets (95%), followed by convenience stores (47%) and farm shops (46%). The results show a 7% increase in use of farm shops compared to the previous results.

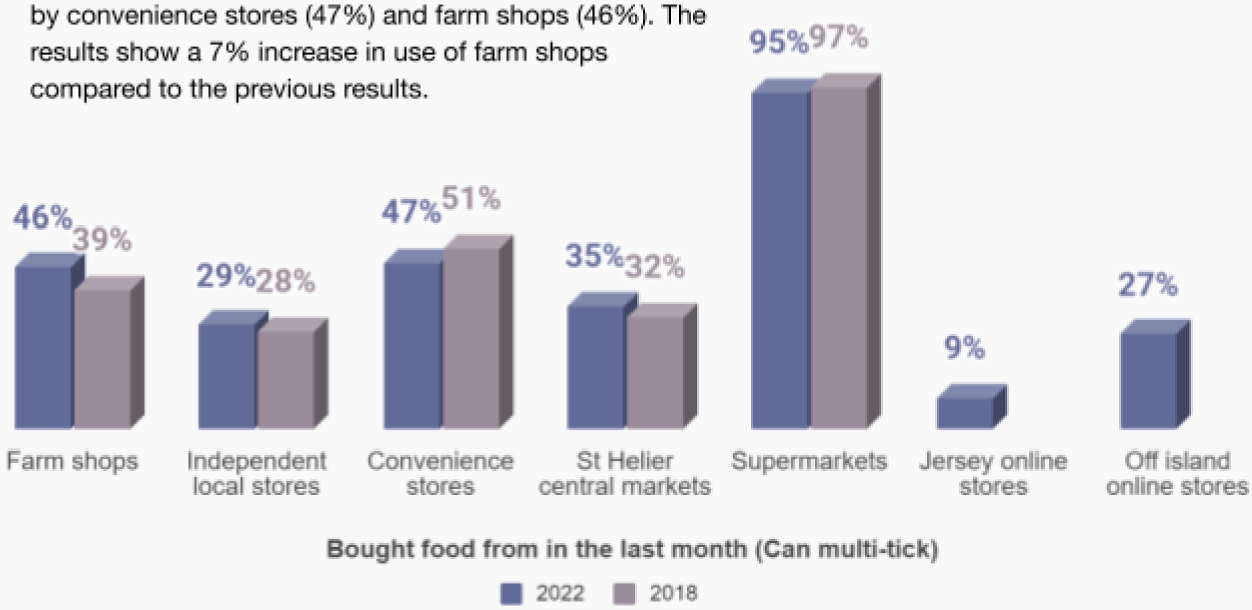
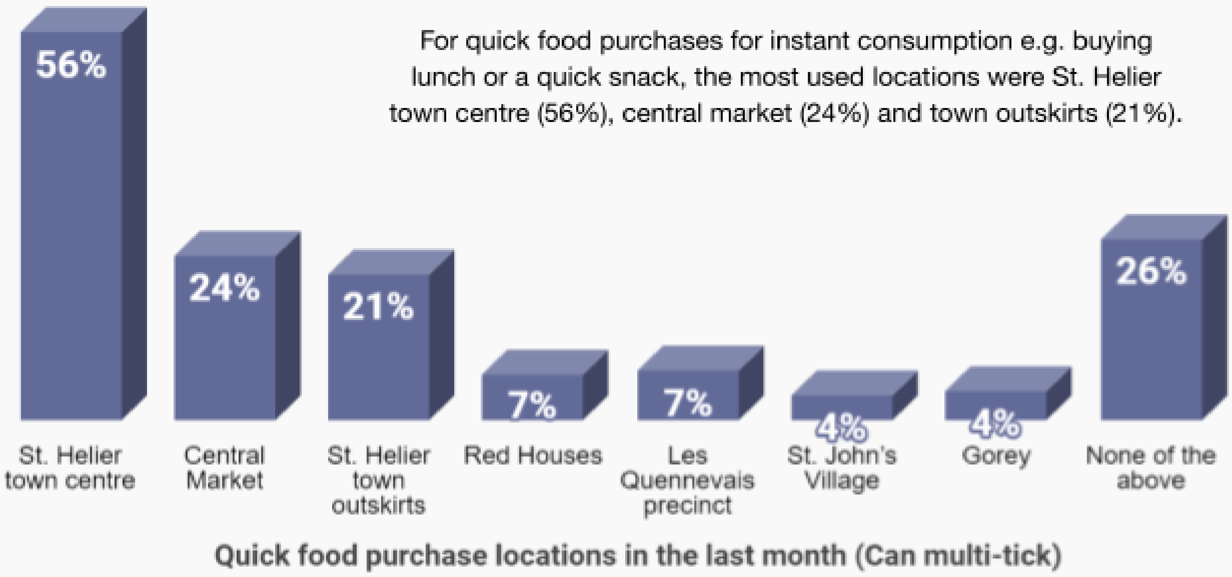


Fig. 31. Shops bought from in the last month for food & groceries [2022 n=1163, 2018 n=871]



Difference by age
Higher percentage of those aged 16-54 using town centre for quick food consumption, vs most of those aged 65+ selected "None of the above"

Fig. 32. Quick food purchases [2022 n=1150]

Shopping Attitudes

Reasons for shopping in Jersey

Respondents were asked for their main drivers for shopping in Jersey, these were getting the item quickly (61%), test/ try the item (41%), convenience (37%) and supporting local (31%). The 3 least perceived drivers for shopping in Jersey were range (1%), cost (4%) and customer service (5%). Supporting local increased by 10% since 2018, jumping from 5th top reason, to 4th.

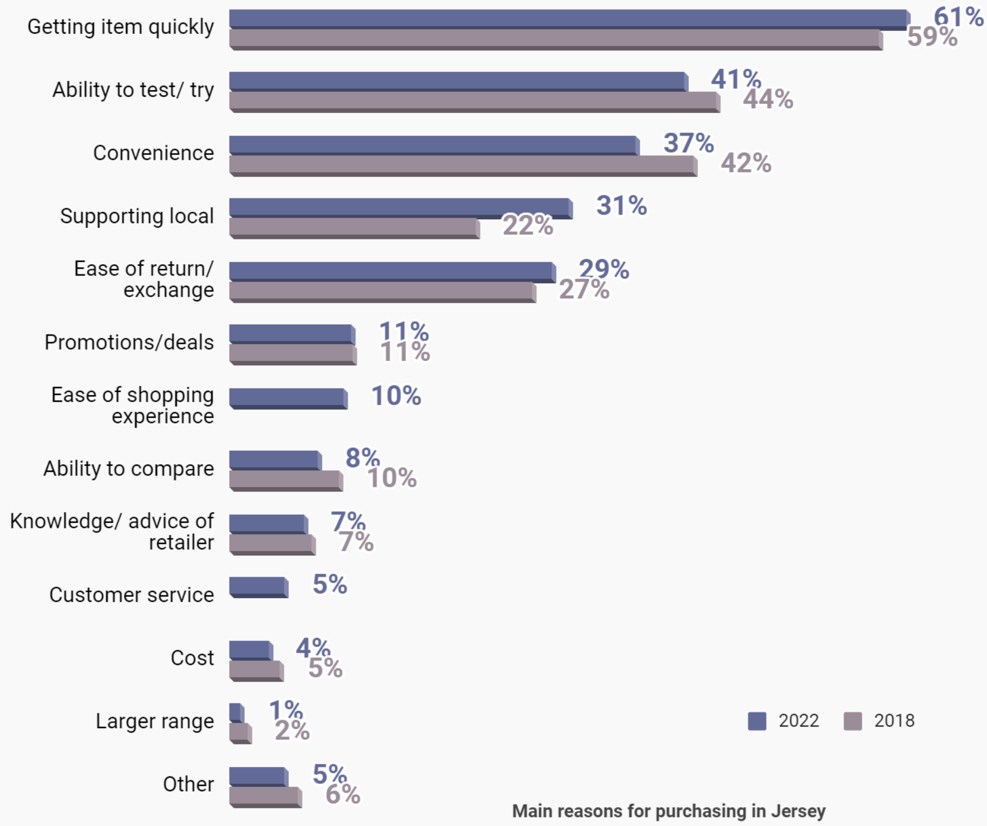


Fig. 33. Main reasons for shopping in Jersey [2022 n=1232, 2018 n=497]

Reasons for shopping online

Respondents were then asked for their main drivers for shopping online rather than in Jersey, the top reasons were cost (71%), convenience (41%) not available in Jersey (39%) and a larger range (36%). These top reasons were the same in 2018, except "not available in Jersey", ranking lower in 2018 (increasing by 24% in 2022).

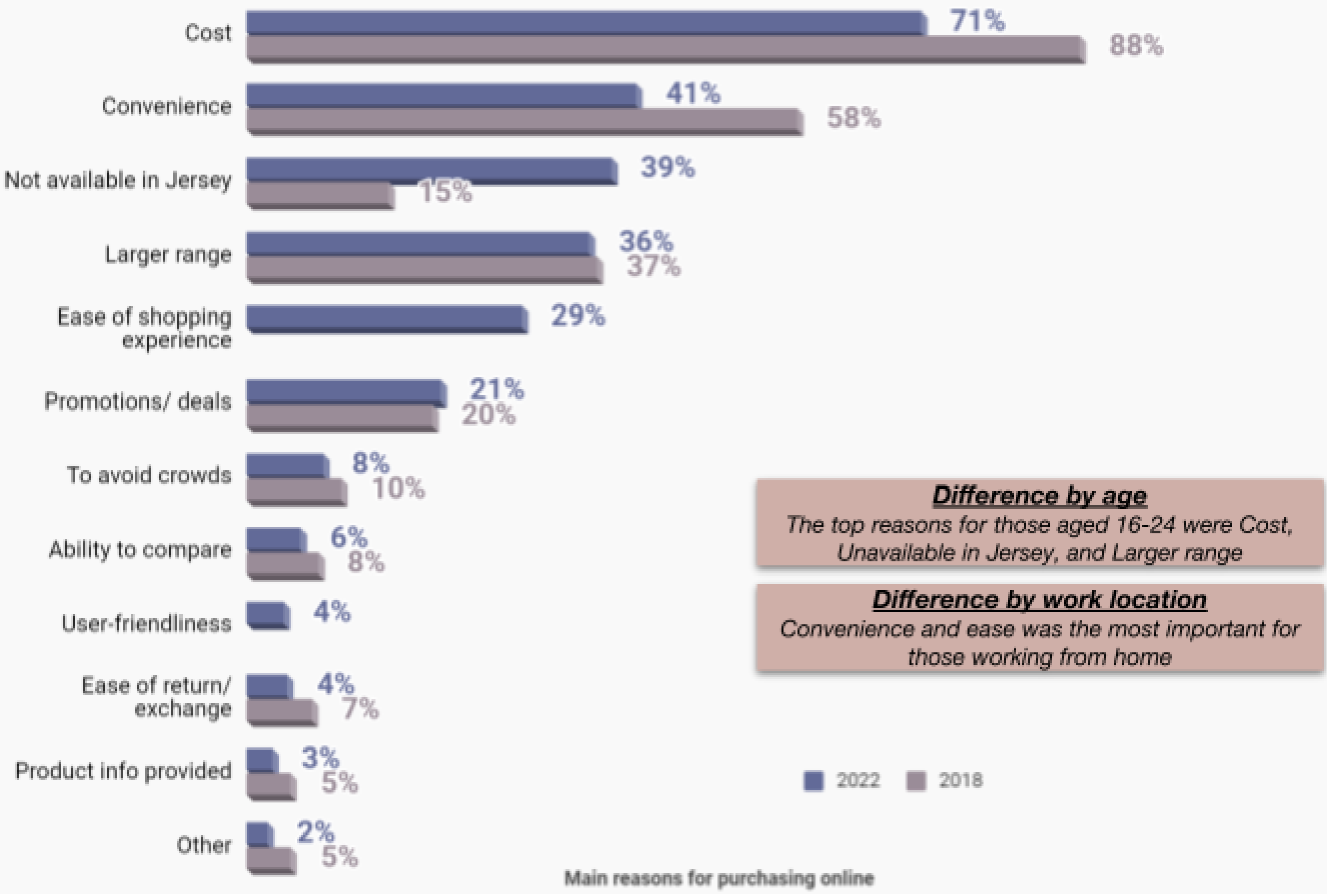


Fig. 34. Main reasons for shopping online [2022 n=1169, 2018 n=497]

Satisfaction of shopping in Jersey

Respondents were asked to score their satisfaction on each aspect of shopping in Jersey with regards to their experience within the last month, on a scale of 1 to 10, 1 being very dissatisfied and 10 being extremely satisfied.

Average scores were calculated to understand how the respondents felt about each aspect. Overall, the average scores ranged from 3.6 to 6.0, which are not very high scores. The highest scoring factors were customer service (avg. 6.0), opening hours (avg. 5.8), the walk through town experience (avg. 5.5), ease of shopping (avg. 5.3) and atmosphere (avg. 5.3). Many of these scores were similar to the results in 2018, however there were significant differences, all involving lower satisfaction scores. The main significantly different factors who received the lowest average scores were the range of shops (avg. 3.7, decreased from 4.9), cost (avg. 3.6, decreased from 4.4),and cost and ease of parking (avg. 4.3 and 4.4, both decreased from 4.8). In addition the overall shopping experience score had dropped significantly too, an average score now of 5.0 decreased from 5.7.

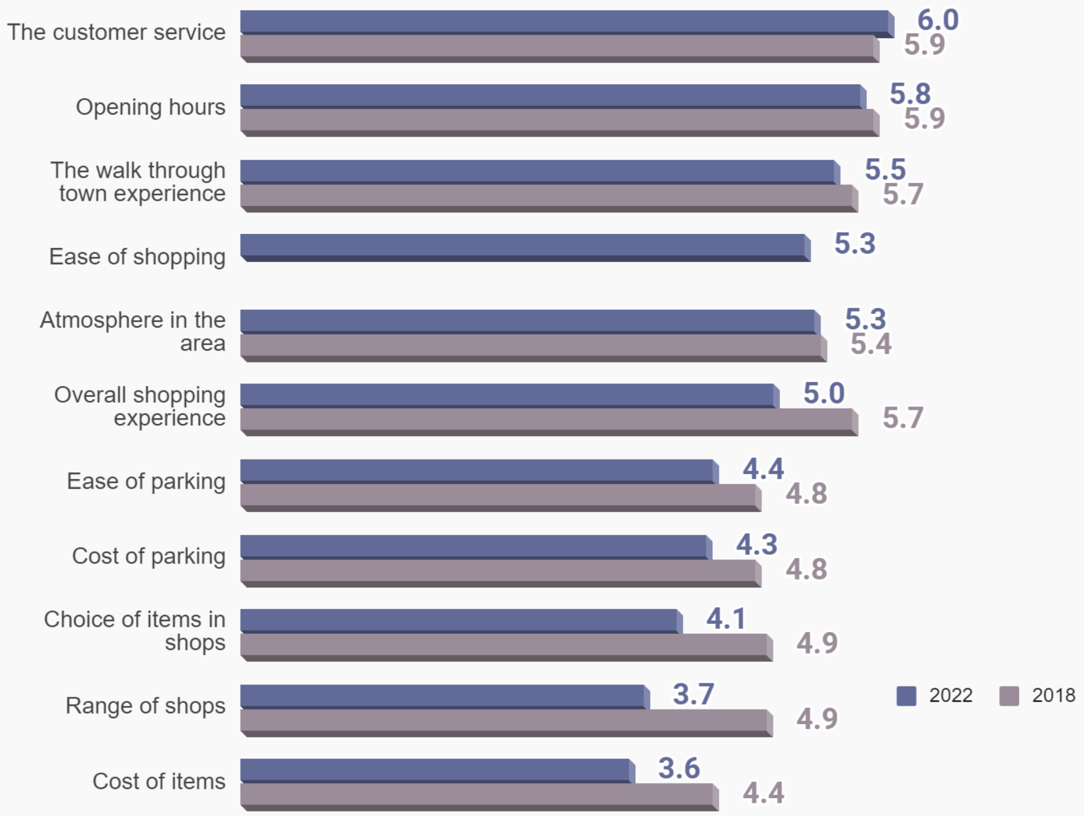


Fig. 35. Satisfaction of shopping in Jersey [2022 n=1371]

Transparency of pricing when shopping in Jersey

51% perceived that shops in Jersey are "Sometimes" transparent on pricing, with 29% perceiving "not at all" transparent, 10% weren't sure, and only 9% perceived "always".

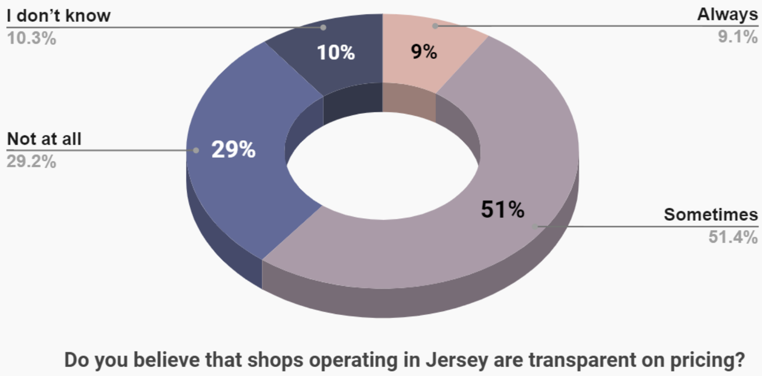
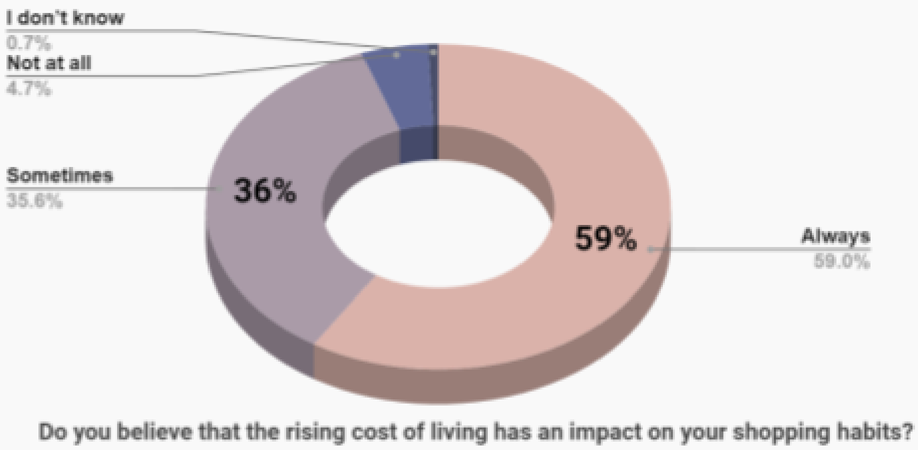


Fig. 36. Price transparency [2022 n=1219]

High impact of rising cost of living on shopping habits

The results showed that 59% perceived that rising cost of living "Always" impacts their shopping habits, 36% "Sometimes" and only 5% "not at all".



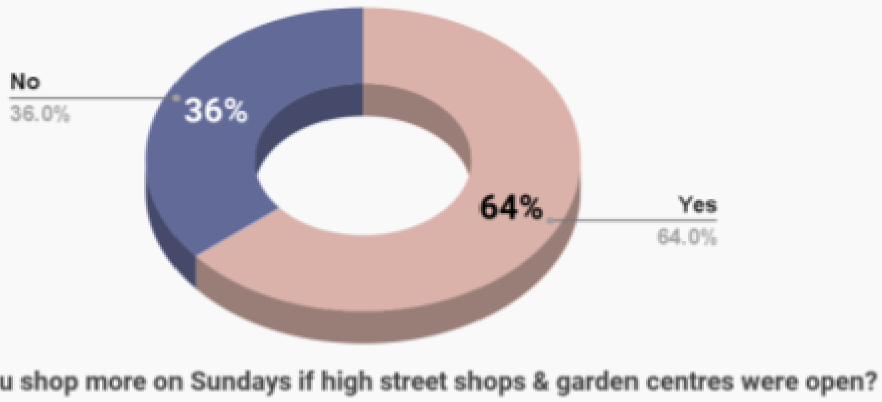
Difference by age
Those aged 16-34 are more impacted by cost of living, 71% of those 16-24 selected "Always", and 73% of those aged 25-34 chose "Always" too

Difference by income
82% of those earning under £20k selected "Always"

Fig. 37. Impact of rising cost of living [2022 n=1372]

Strong call for Sunday and evening opening hours

64% of respondents feel they would shop more on Sundays if high street shops and garden centres were open.

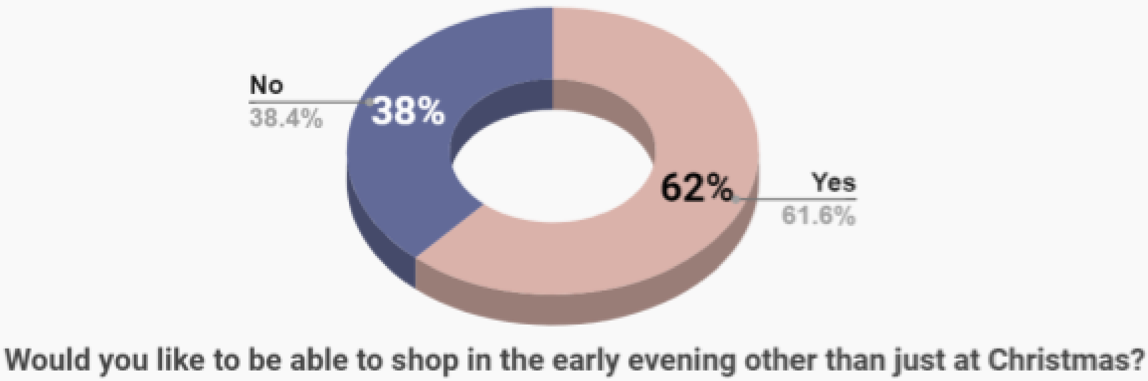


Difference by age
Those younger vs older had polar opposite views, 81% of those aged 16-24 would shop on a Sunday, vs 71% of those aged 75+ would not shop on a Sunday

Difference by income
Those on less than £20k would not likely shop on a Sunday, whereas those on £100k+ feel more inclined

Fig. 38. Sunday shopping [2022 n=1371]

62% of respondents call for shops to be open in the early evening other than just at Christmas.



Difference by working from home & outside town
77% of those who mix working from home & outside of town would like to shop in early evening

Difference by age
The same for evening shopping, those younger vs older had polar opposite views, 87% of 16-24's would shop late, vs 86% of 75+'s would not shop later

Fig. 39. Evening shopping [2022 n=1373]

Enhancing shopping experiences

Respondents were given various options to express importance toward, the most important factors were more 3 hour shopper parking (48%) and better public toilets (37%). However, 33% selected “None of the Above”, showing that these enhancements weren’t as important to them when shopping, than key preference for broader improvements such as price and convenience.

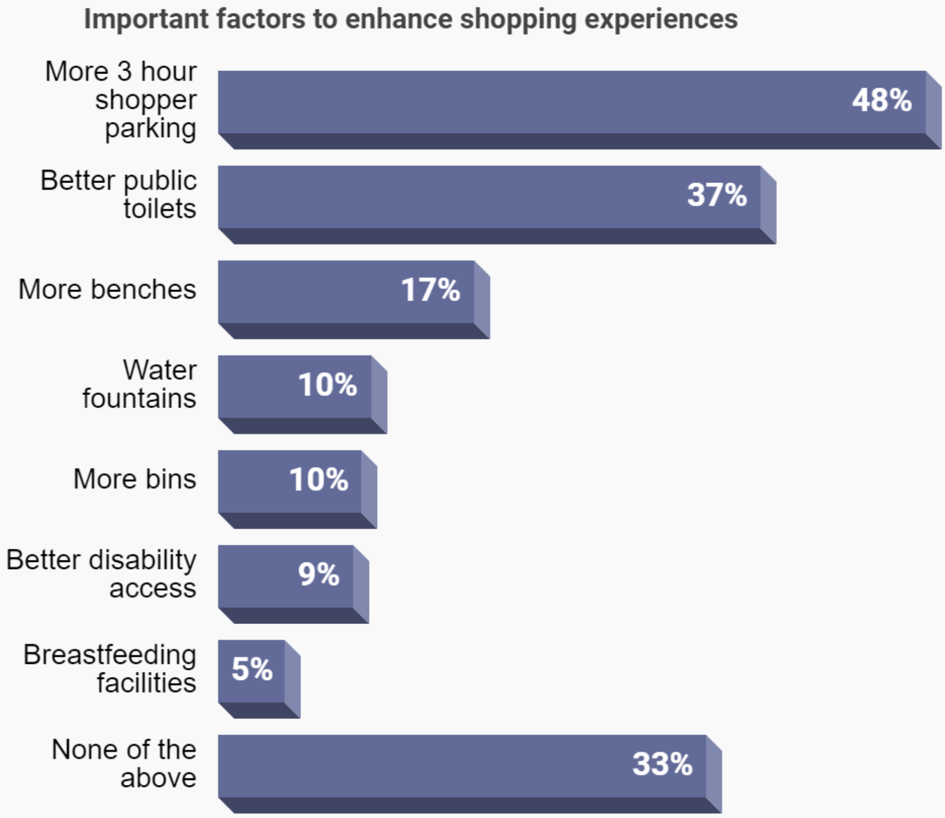


Fig. 40. Enhancing shopping experiences [2022 n=1207]

Encouragement to shop more in Jersey

Respondents were asked to select any of the following factors if they felt this factor would encourage them to shop more in Jersey. The top choices were discounts and promotions (60%), more brands (51%), independent shops (42%) and shops open later than 5pm (42%). Therefore the key desires were affordable prices, more choice of items / brands and shops, and convenience with being able to access shops at convenient times. The top choices in 2018 were discounted retailers (58%), shops open later than 5pm (42%), online local shopping with delivery (41%), more brands (38%) and online shopping to collect in-store (38%). The comparison shows that views in 2018 were more based around convenience such as later opening times, accessibility to items such as delivery or in-store collection services.

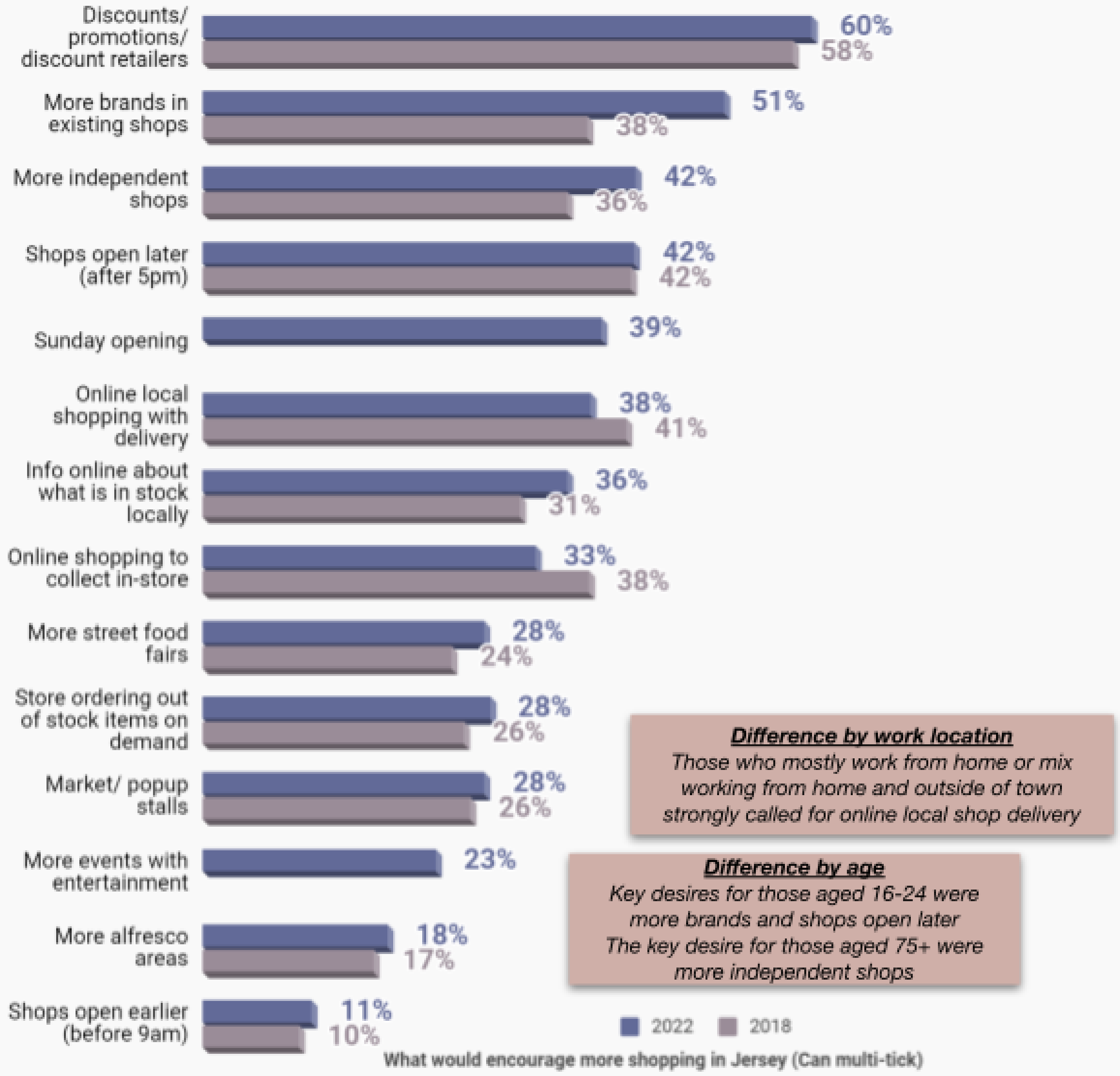


Fig. 41. What would encourage more shopping in Jersey [2022 n=1283, 2018 n=1066]

What could improve your shopping experience in Jersey?

The survey received 791 responses to the question which asked “What could improve your shopping experience in Jersey?”. The main call for improving retail in Jersey was to introduce different affordable high-street brands, in particular, H&M, Zara, The Range (222 mentions). Price was the second most mentioned improvement, calling for cheaper prices or prices compared better to the UK (212 mentions). Many called for a better choice and range of items to choose from (186 mentions).
Parking was a strong factor for many, desiring more availability of parking, free parking, shopper parking, or cheaper parking (140 mentions). Strong perception that customer service is poor, large call for better training, more helpful staff and just generally more friendliness. Accessibility was mentioned many times, in particular disability access and parking. Hyper markets or a large supermarket like Lidl was called for to help affordability and provide a better range of choice.

Fig. 42. Improve shopping experience open-ended answers [2022 n=791]

Other calls for: Food/ dining, online capabilities e.g. click and collect, independent shops, strong dislike toward perceived monopoly of Sandpiper, entertainment/ events, facilities e.g. toilets, promotions, Sunday trading, cover/ shelter, less traffic/ more pedestrianisation, cycling access, improved bus service.

Differences by resident vs visitor

We received a response from visitors (2%, 30 visitors), mostly from the UK, other Channel Islands, France and Germany, 60% spending over a week in Jersey. Most of the results from both Jersey residents and visitors were very similar, however on average they scored the atmosphere, the walk through experience and ease of shopping the highest when shopping in Jersey. Their key improvements for shopping in Jersey were shops open later than 5pm and markets/ pop-up stalls.

Appendix

Survey Demographics

The 2022 survey received responses from a range of individuals from differing demographic backgrounds. Although no weighting of results was conducted, the results were reasonably representative and differences in views have been highlighted throughout this document as relevant.

The survey incorporated demographic questions, to gather the range of demographic. No weighting of the results was used, however the results found a diverse mix of socio-demographics such as age (16+), gender, Parishes, income, including if Jersey born or not, consumer behaviours/segments, employment sector. It was key to target a reasonably representative sample of islanders.

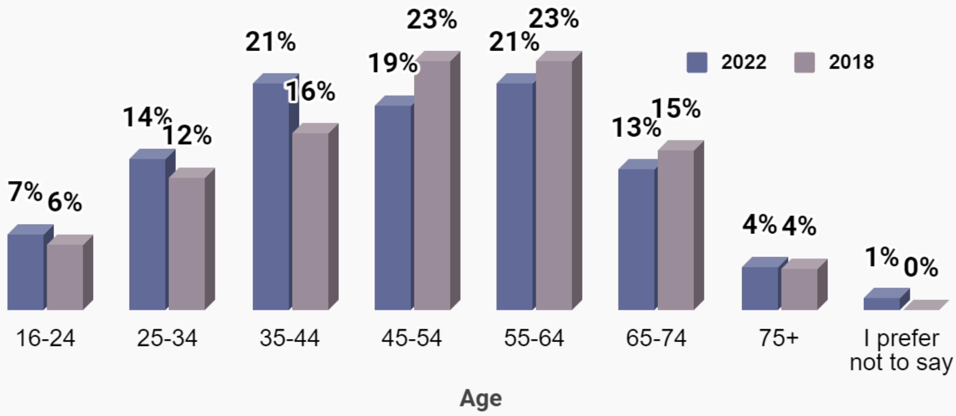


Fig. 43. Survey demographics - age [2022 n=1528] [2018 n=1118]

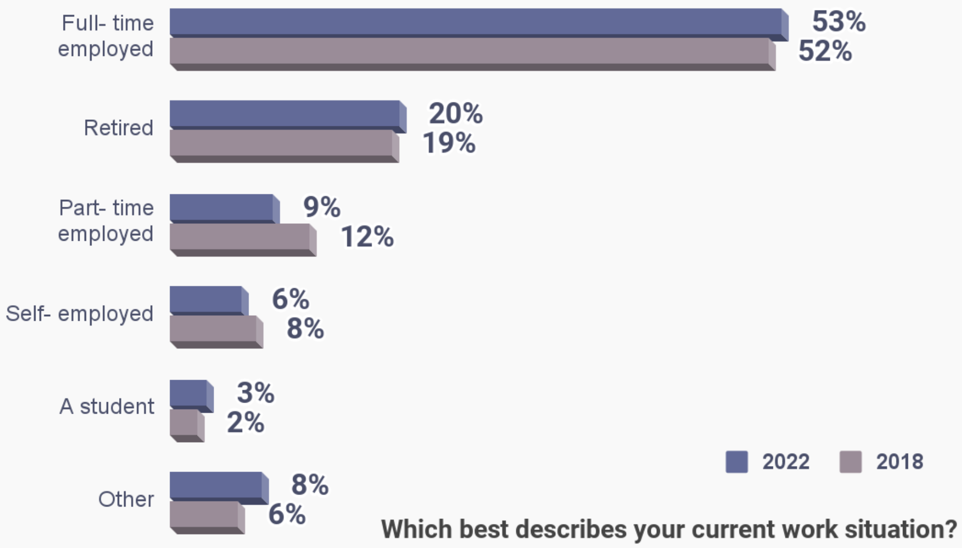


Fig. 44. Survey demographics - employment [2022 n=1528] [2018 n=1494]

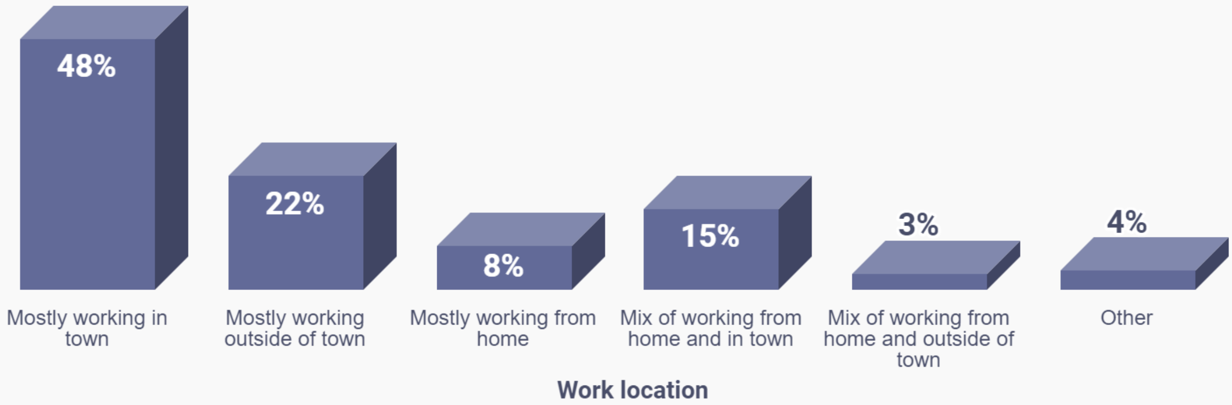


Fig. 45. Survey Demographics - work location [2022 n=1011]

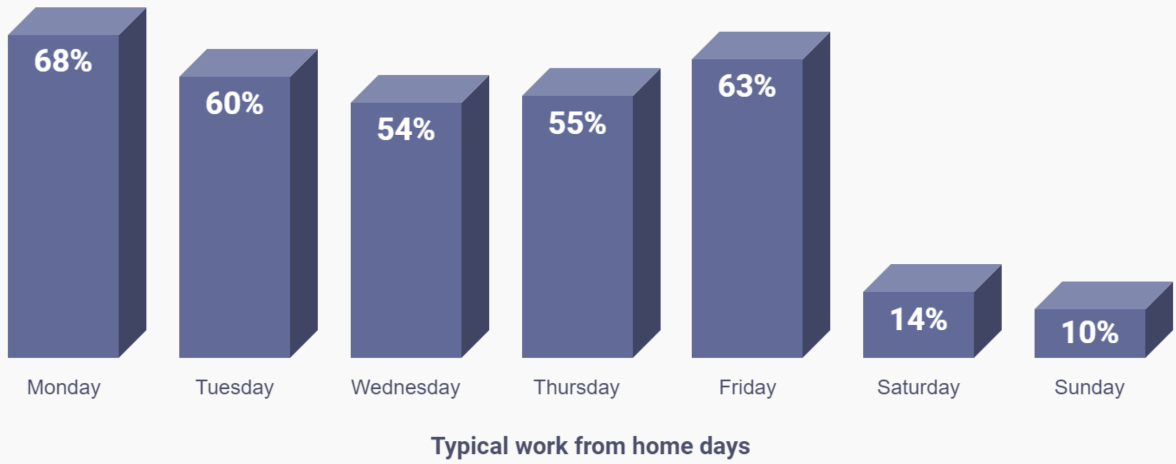


Fig. 46. Survey Demographics - working from home days [2022 n=252]

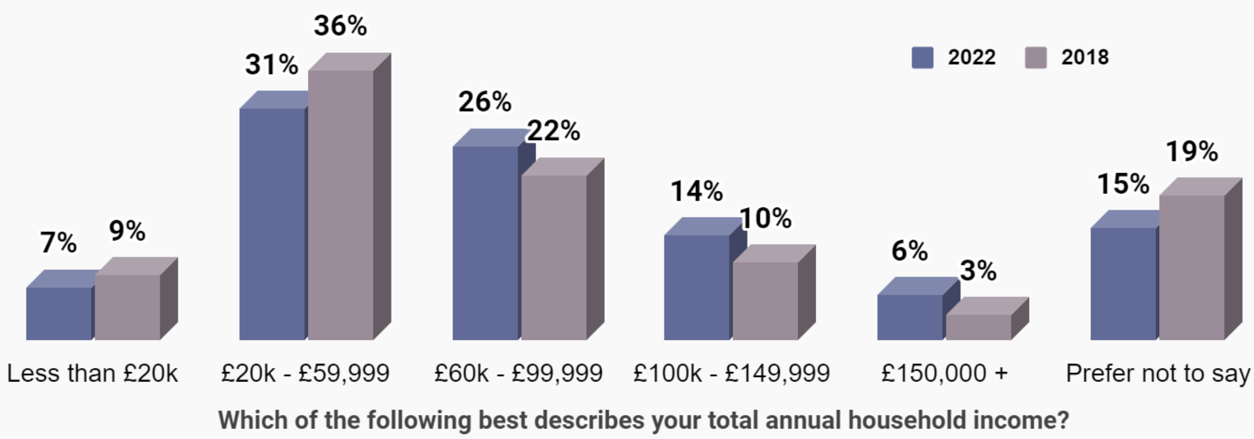


Fig. 47. Survey Demographics - total household income [2022 n=1277] [2018 n=974]

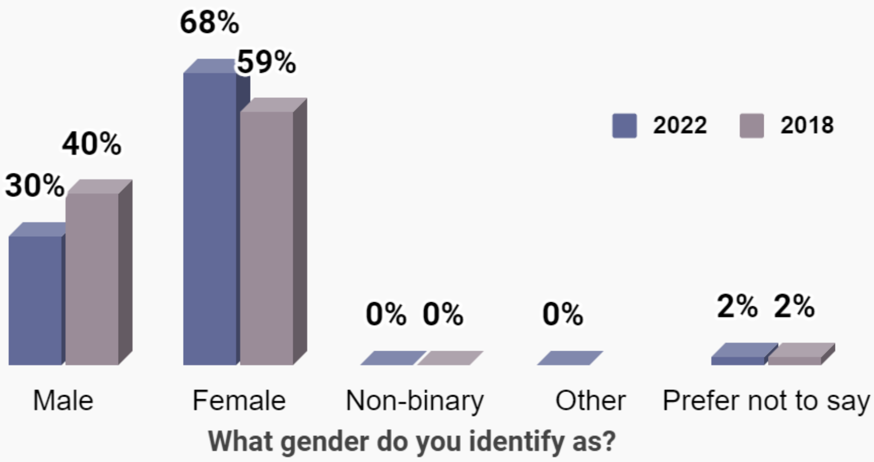


Fig. 48. Survey Demographics - gender [2022 n=1302] [2018 n=1076]

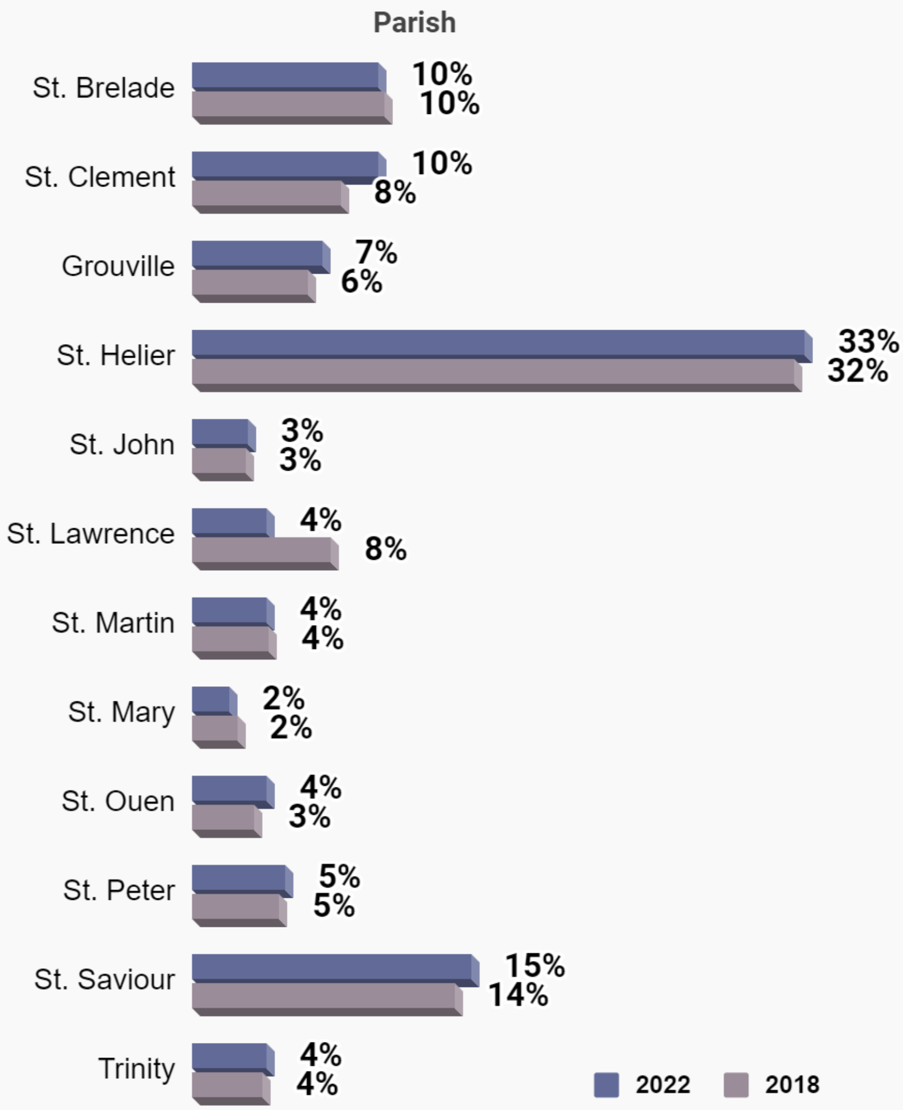


Fig. 49. Survey Demographics - Parishes [2022 n=1284] [2018 n=929]

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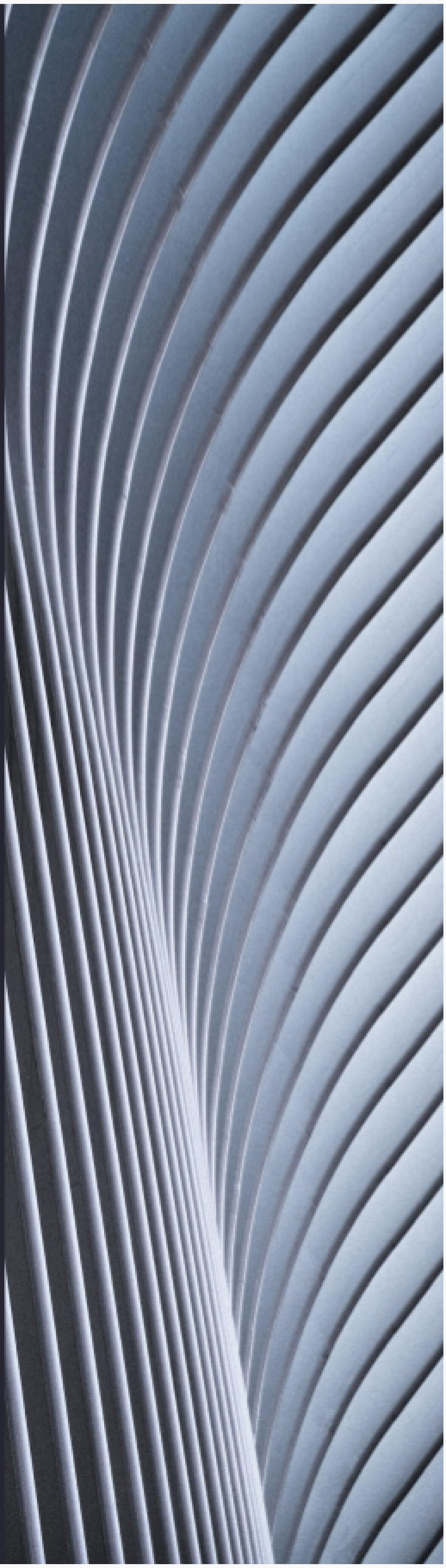
Jersey Retail 2023 Report

Perceptions, experiences & needs



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