4insight

Groceries in Jersey

Behaviours, experiences & attitudes

Prepared for:
Jersey Competition Regulatory Authority
April 2023

Contents

Executive Summary

4insight is an independent, professional local research agency and was commissioned by the Jersey Competition Regulatory Authority (the Authority) to gain views and experiences of grocery shopping in Jersey, both in-person and online, to inform the Groceries Market Study report to be published mid 2023. An online, quantitative, semi-structured survey supported by street CAPI interviewing was used to generate a statistically representative sample size for Jersey.

The research explored grocery shopping behaviours, attitudes, potential improvements for consumers and key drivers for change.

The findings show that respondents tend to shop for groceries multiple times a week rather than doing one 'weekly shop'. Brand loyalty to a single grocery retailer is less frequent, with most respondents 'shopping around' at several different stores during a typical week. In terms of specific retailers, Waitrose was the most used, closely followed by the Co-op and Marks and Spencer. The majority of respondents don't shop for groceries online, those who do use a variety of on-island and off-island online stores and shop less frequently, mostly opting for a monthly online grocery shop.

In terms of spending, most households spend between £50-150 on groceries in person each week, with over half of respondent households spending over £100. Those who shop for groceries online spend less, with the vast majority of households spending under £75 in a typical week.

Shopping for groceries in person rated 5.7 (mean score, out of 10) for overall shopping experience and scored particularly low in terms of value for money (3.96). Online shopping scored slightly higher (6.27, overall shopping experience) but there were low scores both in-person and online across a range of categories. There were mixed satisfaction levels amongst respondents, with 39% 'very unsatisfied' or 'unsatisfied' and 35% 'satisfied' or 'very satisfied' with the grocery shopping experience.

When looking at where respondents choose to shop for groceries, insights show that value for money and a high quality range of products is more important than the convenience of store location or supporting local business. Open-ended responses reveal clear calls for lower prices, with 607 of the 1,059 responses mentioning this in some form. Responses also include calls for alternative supermarket options, with particular calls for more 'budget' competitors and a French supermarket.

About the Research

Research Aim & Objectives

The research aim was to conduct a survey to gain an understanding of islanders' household grocery shopping behaviours and perceptions.

Specific objectives included:

- identifying household grocery shopping behaviours in Jersey e.g. location, frequency, weekly spend.
- elicit views and perceptions of groceries in Jersey such as key drivers to buy or change where they buy.
- identifying perceived market strengths and weaknesses.
- identifying online and off-island grocery shopping experiences and satisfaction levels.
- identifying key improvements needed.

Scope, Sample & Methodology

Scope:
Jersey grocery shoppers over 16 years old.

Sample:

Recruitment and promotion of this Groceries survey was through:

- 4insight's online panel of 4000+ Islanders
- 4insight social and traditional media posts and paid boosts
- Authority press release plus social and traditional media
- Jersey Consumer Council social media
- Street interviews at various locations

The online survey contained some screening questions for profiling and cross tabulation production, this included demographics, socio-economics, grocery shopping behaviour and attitudes.

The early survey questions excluded anyone who was under 16 years old, or if they had any immediate family working for a grocery retailer. Another early question also ensured that they were responsible for, or had influence over the groceries shopping in their household.

Methodology:

4insight reviewed the key objectives and as a lot of the information required was behavioural or attitudinal we designed an online semi-structured survey with a mix of closed questions and semi-structured questions eg. statement agreements, shopping behaviours with two truly open-ended questions near the close.

4insight designed the online survey questions in a Word document for review and sign off, then programmed it into our professional survey software. The first question was an age question, as under 16 year olds require parental permission so needed to be screened out. Other socio-demographic questions were left until near the end of the survey.

The online survey was designed for completion on mobile, however optimised for PC and tablet too. Hard copies of the survey and a phone-in option were also available, in addition to street interviews happening at several locations across the island to obtain a good representative sample across the various demographics.

The survey was hosted by 4insight, ensuring adherence to strict Codes of Conduct, (MRS, ESOMAR), independence, and allowing more open and honest responses by participants.

A ‘soft launch’ happened to a small group first and 4insight reviewed/quality checked the resulting data prior to a full survey launch. The survey was launched on 31st January 2023 and was closed on 27th February 2023. Street interviews were also used to interview (CAPI) on iPads across several different locations in the last week of fieldwork.

In total the survey received 1,622 responses and after quality checks plus data cleaning we had **1,579** responses, which is a good statistically representative sample size (a sample size of 730 is statistically representative for Jersey).

List of Figures


Research Results

Behaviours

Grocery Shopping Patterns

Initial survey questions focused on grocery shopping in-person, not including any online shopping. Results show that the majority of respondents shop for groceries multiple times each week, with 59% shopping ‘several times a week’. Just 22% of respondents do a ‘weekly’ grocery shop.

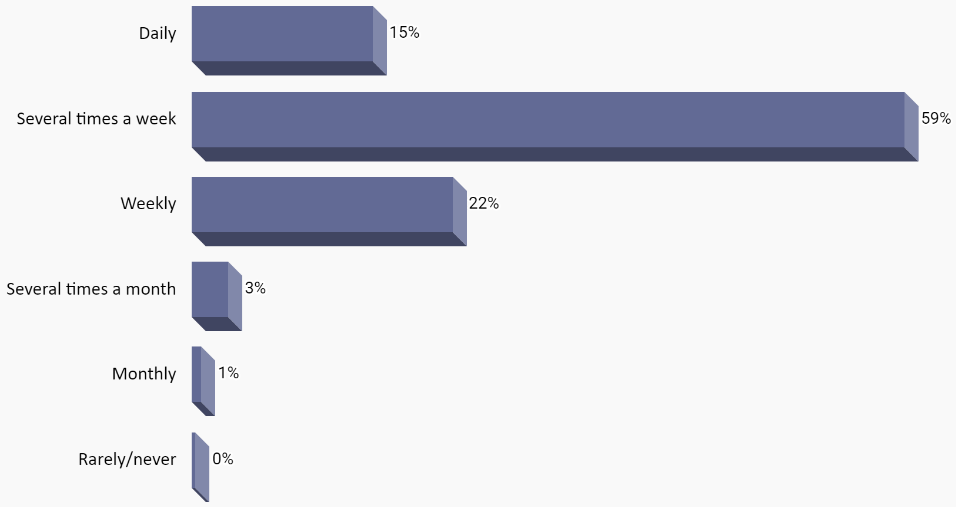


Fig. 1. In-person shopping frequency (n=1484)
Q. How frequently do you shop for groceries in person?

Cross-tabulations run by Parish show that those living in St Helier more frequently shop on a ‘daily’ basis, with just over half shopping ‘several times a week’. Comparatively, just 12% of those living in Grouville shop on a ‘daily’ basis.

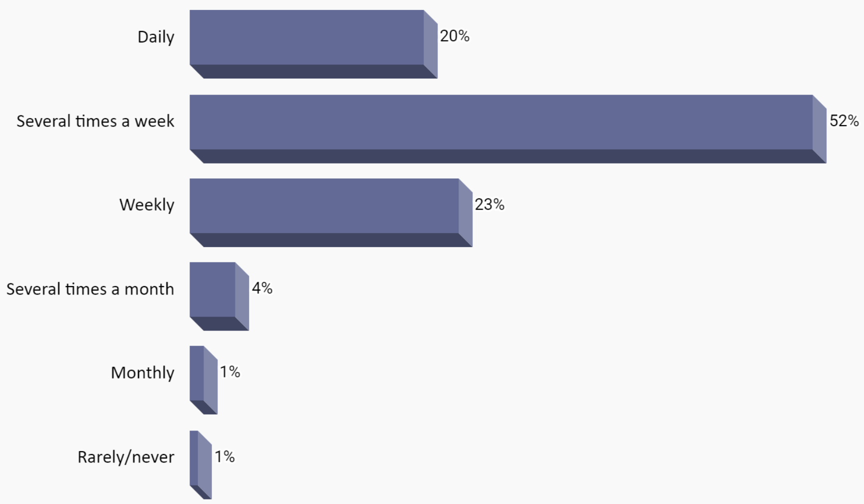


Fig. 2. St. Helier In-person shopping frequency (n=444)
Q. How frequently do you shop for groceries in person?/Q. Which parish do you live in?

In terms of shopping habits, respondents tend to shop at different stores, with just 19% shopping for groceries at a single store. The most common pattern being 'One 'main shop' plus 'top ups' (from different stores) over several days'.

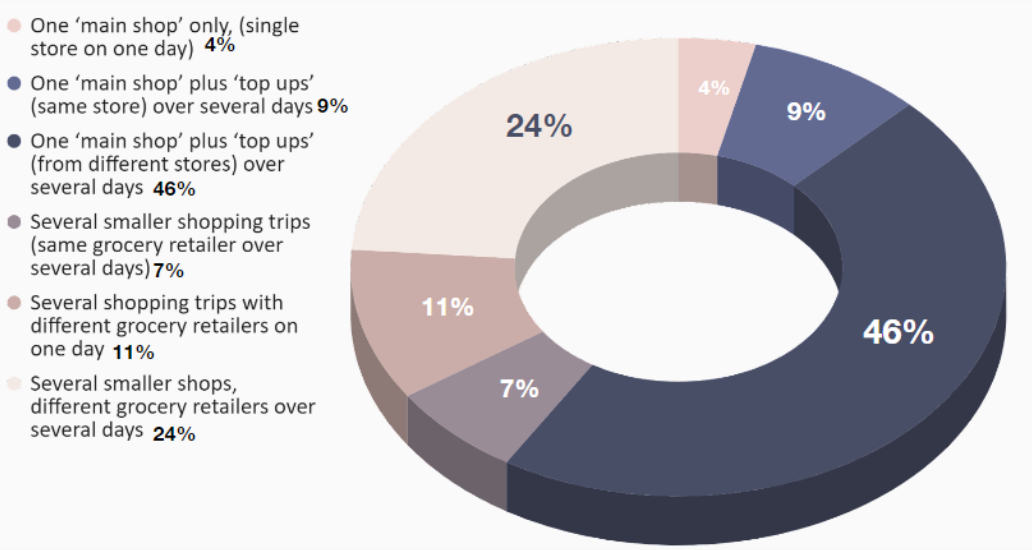


Fig. 3. In-person shopping habits (n=1446)

Q. In a typical week, which of these best describes how you purchase groceries?

When looking at different retailers and locations for grocery shopping, Waitrose was used by the most respondents, very closely followed by The Co-op and Marks and Spencer, then Iceland and Morrisons. Local farm shops were used by 28% of respondents.

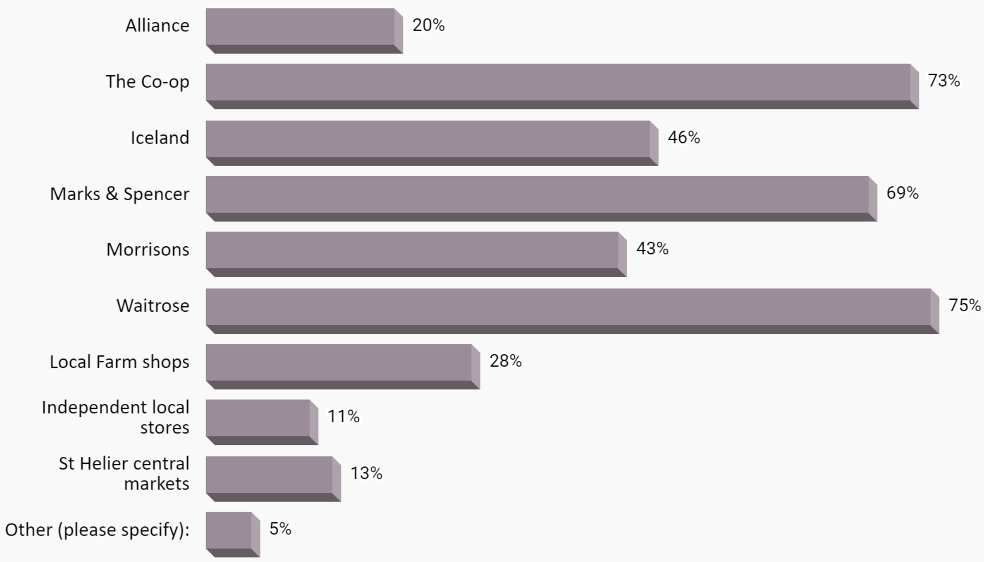


Fig. 4. In-person shopping by retailer/location (n=1432)

Q. Which of the following do you use for your grocery shopping? (multi-tick)

Of those who prioritised ‘value for money’ later in the survey, a higher percentage shop at Iceland (63% n=561).

Online Grocery Shopping Patterns

The following section focuses on online grocery shopping. Of those surveyed, 29% said they shop for groceries online.

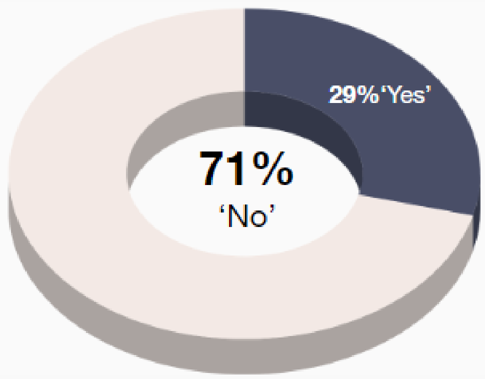


Fig. 5. Online grocery shopping (n=1424)
Q. Do you shop for groceries online?

When analysed by age segment, younger people were more likely to shop for groceries online, with 37% of those aged under 55 answering ‘yes’.

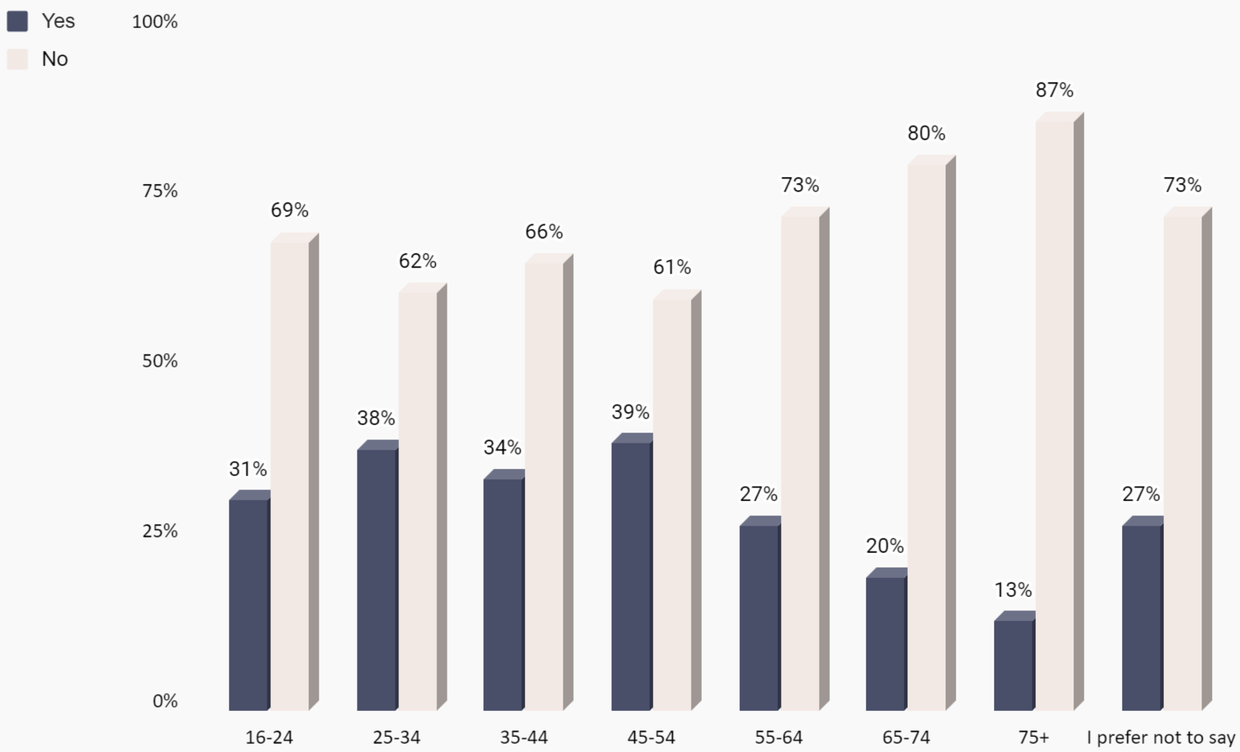


Fig. 6. Online grocery shopping by age segment (n=1424)
Q. Do you shop for groceries online?/Q. Which age category do you fall into?

Respondents who shop for groceries online tend to do so at a much lower frequency, most commonly opting for a ‘monthly’ online grocery shop. Very few shop ‘daily’ or ‘several times a week’.

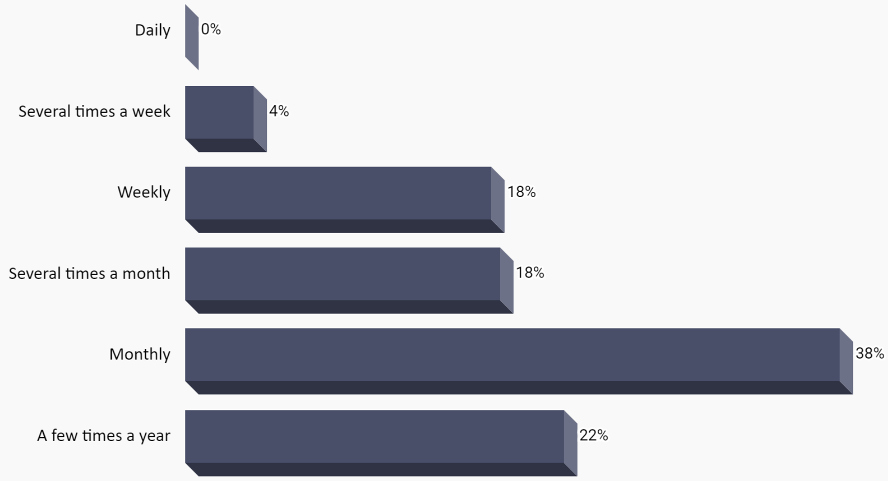


Fig. 7. Online grocery shopping frequency (n=405)
Q. How frequently do you shop for groceries online?

In terms of online retailers used, local online stores were initially the focus, however a few options for off-island online stores were added (HelloFresh, Cherryz and Mindful Chef). Of the options provided Orderit.je was the most frequently used, closely followed by Cherryz.

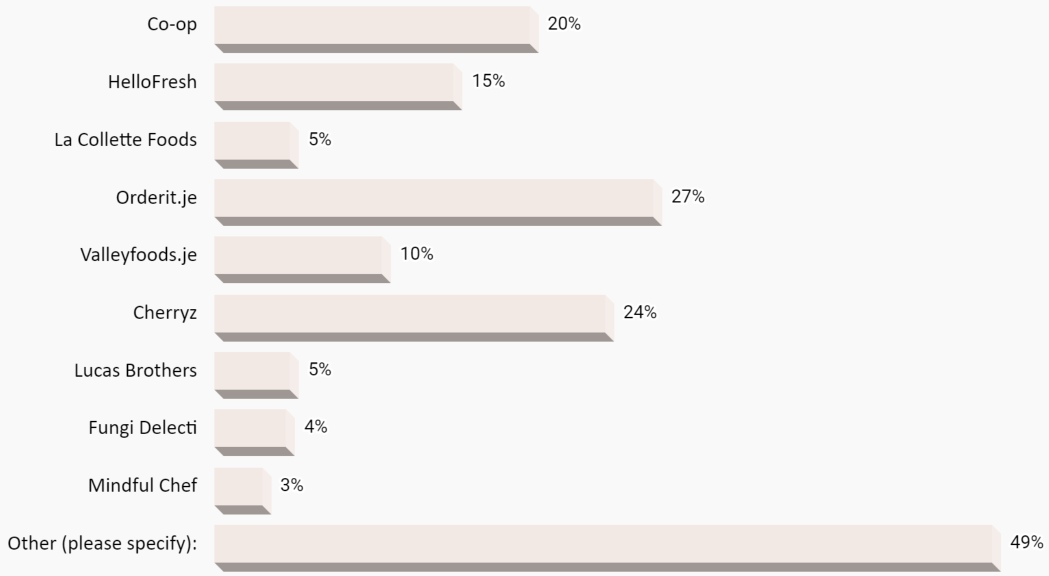
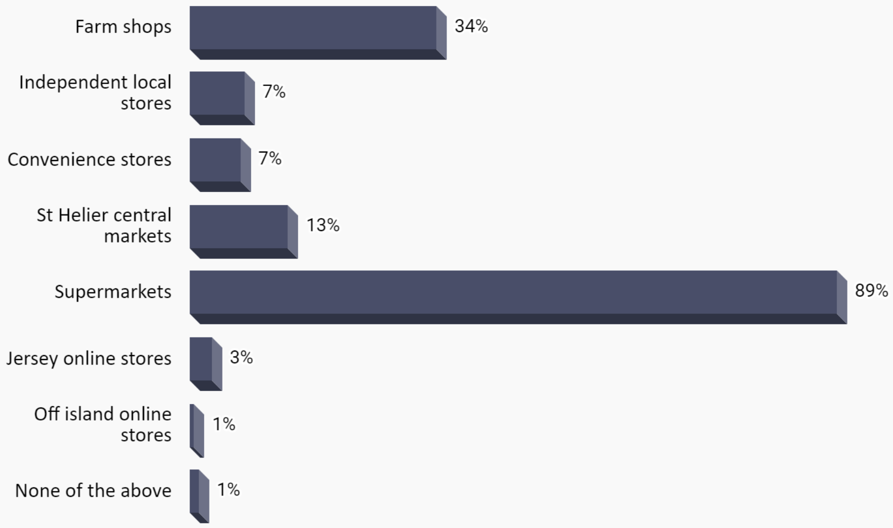


Fig. 8. Online grocery shopping by retailer (n=402)
Q. Which of the following do you use for your online grocery shopping?

Notably, nearly half of respondents who shop online selected ‘Other’. Of those who selected this option and specified, 179 (87%) use Amazon.

Shopping Patterns by Product Category

When shopping for **fruits and vegetables,** the vast majority of respondents use supermarkets, with just over a third using farm shops.



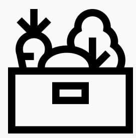
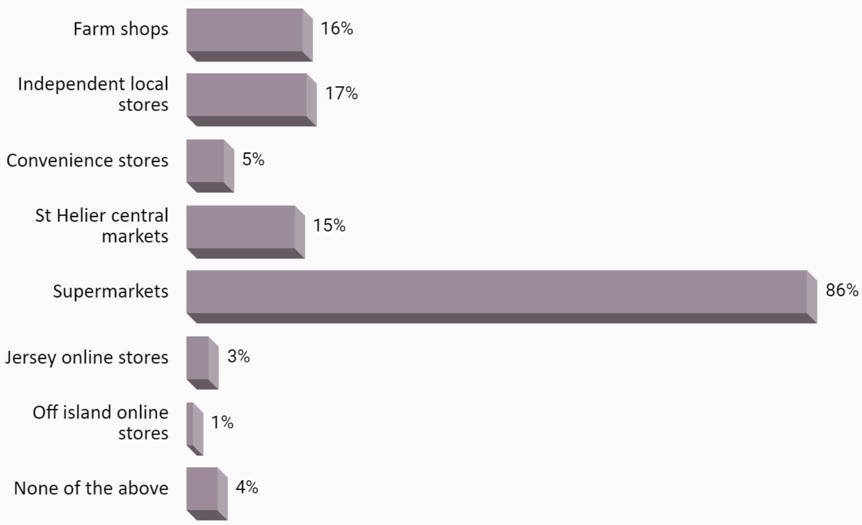


Fig. 9. Grocery shopping (fruits and vegetables) (n=1400)
Q. When shopping for fruits and vegetables, which of the following do you tend to shop at? (multi-tick)

For **meat and fish**, the majority of respondents again use supermarkets. More respondents shop at independent local stores. Fewer respondents use farm shops compared to for fruits and vegetables.



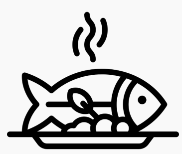


Fig. 10. Grocery shopping (meat and fish) (n=1398)

Q. When shopping for meat and fish, which of the following do you tend to shop at? (multi-tick)

For **dried goods/pantry items**, even more respondents use supermarkets. In this product category more use online stores, particularly ‘Off island online stores’.

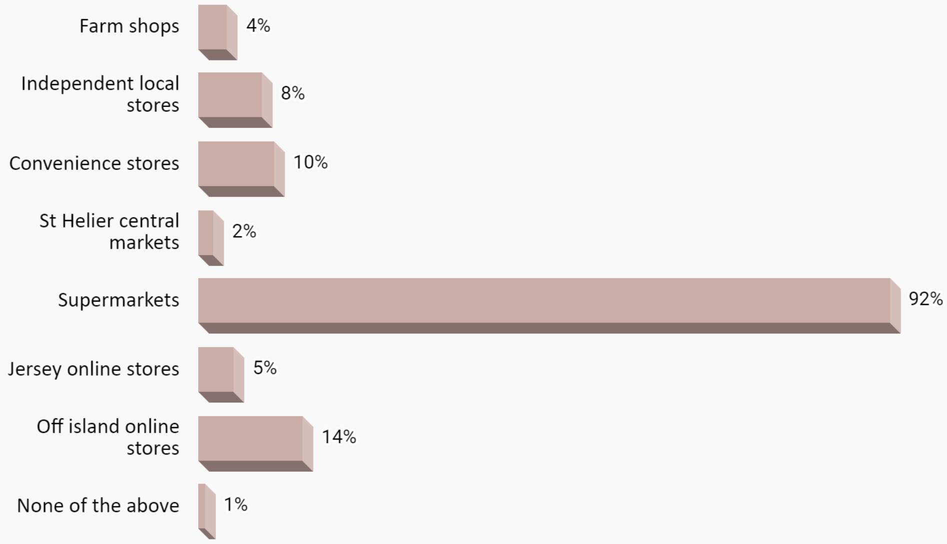


Fig. 11. Grocery shopping (dried goods/pantry items) (n=1401)
Q. When shopping for dried goods/pantry items, which of the following do you tend to shop at? (multi-tick)

When shopping for **household goods** (toilet rolls, cleaning products etc.) less respondents use supermarkets compared to other product categories, but it's still the most commonly used. Even more respondents shop online for household items, with nearly a third of respondents using ‘Off island online stores’.

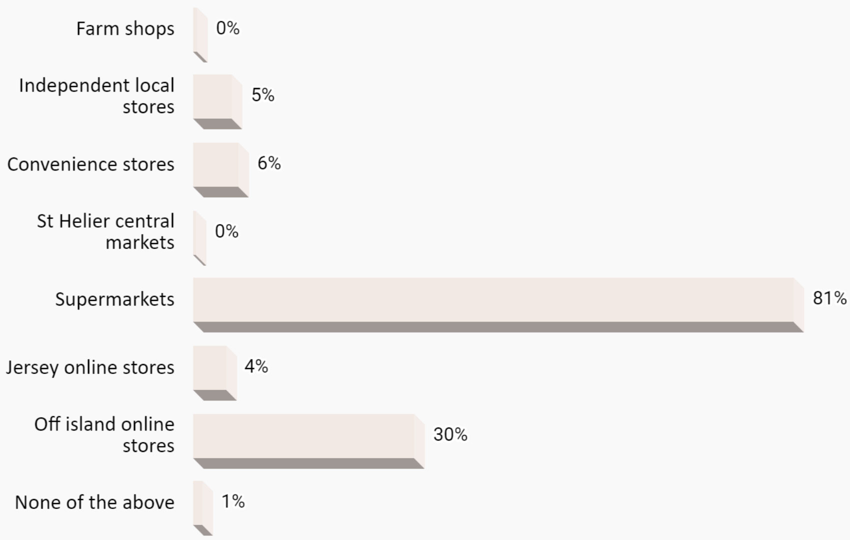


Fig. 12. Grocery shopping (household goods) (n=1402)
Q. When shopping for household goods , which of the following do you tend to shop at? (multi-tick)

Spending

In-person Grocery Spending

This section focuses on household grocery spending in-person (not including any online shopping). Most households spend between £50-150 on groceries each week (66%), with £75-100 being the most common typical weekly spend.

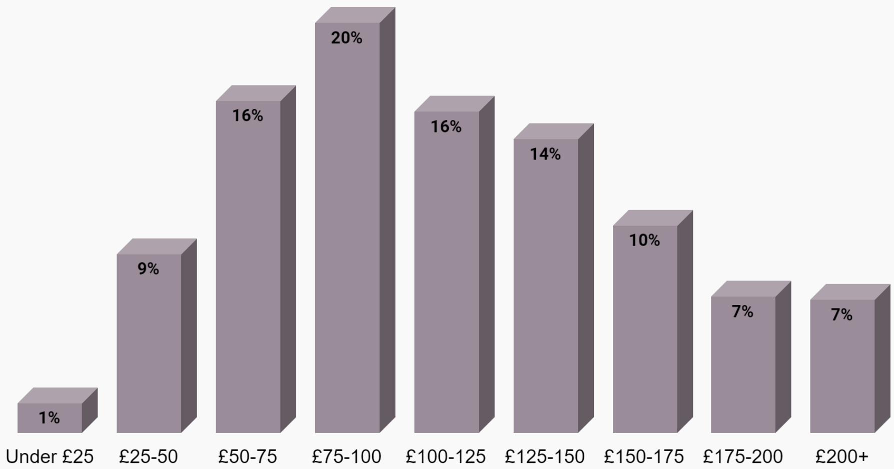


Fig. 13. In-person grocery spending (n=1426)
Q. In a typical week, how much does your household spend on groceries in person?

When household spending is analysed by age, respondents in the 35-64 segment tend to spend more, with 60% spending £100 or more on groceries in a typical week. Comparatively, 47% of those under 35, and 43% aged over 65 spend over £100 each week.

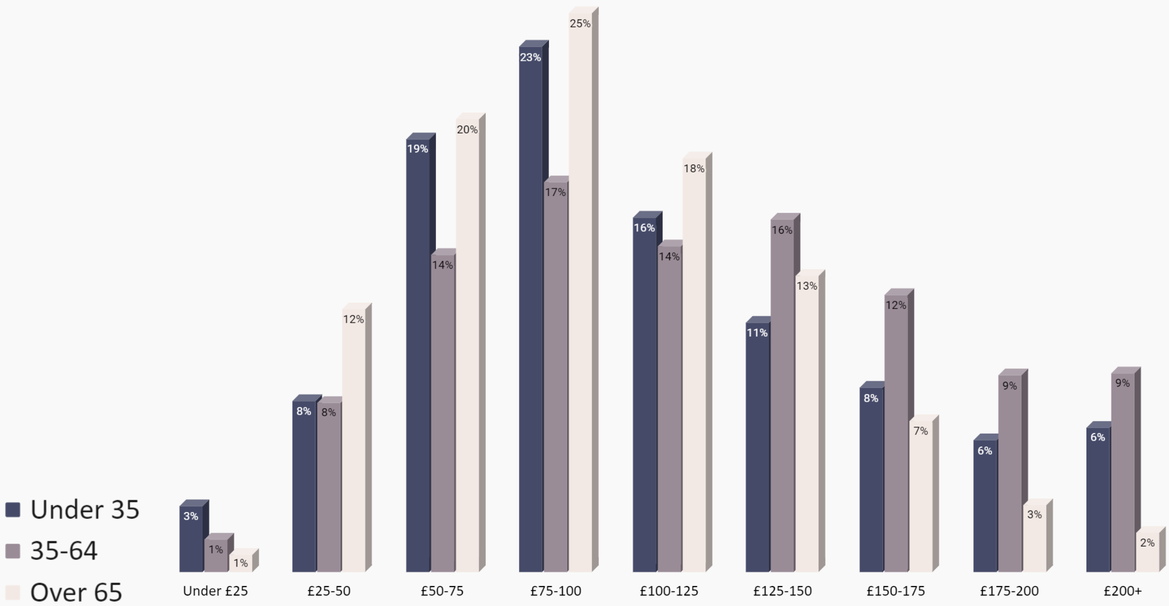


Fig. 14. In-person grocery spending by age segment (n=1426)

Q. In a typical week, how much does your household spend on groceries in person?/Q. Which age category do you fall into?

Online Grocery Spending

Compared to in-person, household grocery spending online tends to be a lot lower. The majority of those who shop for groceries online spend under £75 each week, with just 12% of respondents spending over £100.

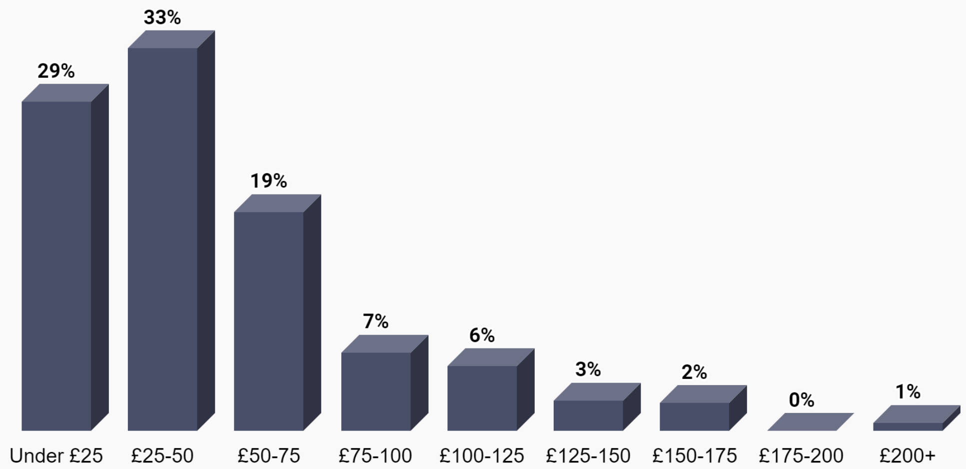


Fig. 15. Online grocery spending (n=406)

Q. In a typical week, how much does your household spend on groceries online?

Attitudes

In order to gauge perspectives on grocery shopping, an initial attitudinal question was asked to understand what's most important to respondents. Out of the four options, value for money and quality/range of products emerged as most important. Notably, just 11% of respondents prioritised convenience of store location.

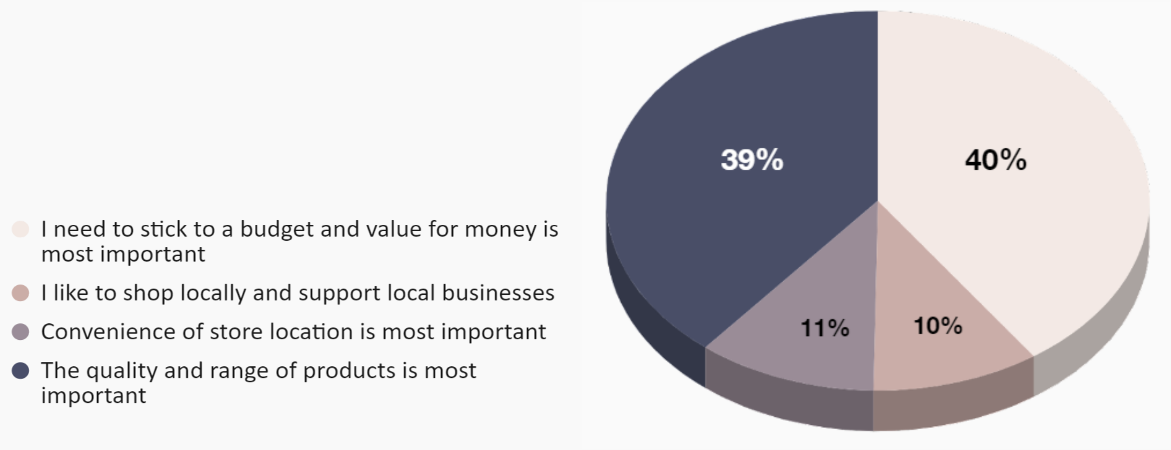


Fig. 16. Grocery shopping attitude segments (n=1393)
Q. Which of the following statements best describes your attitude towards grocery shopping in person?

When analysing weekly spend by the two most common grocery shopping attitudes, a clear pattern can be seen. Respondents who prioritise value for money are spending less on groceries than those who value the quality and range of products. Of those who prioritise sticking to a budget and value for money, 44% spend over £100 on groceries each week, compared to 63% for those who prioritise quality and range of products.

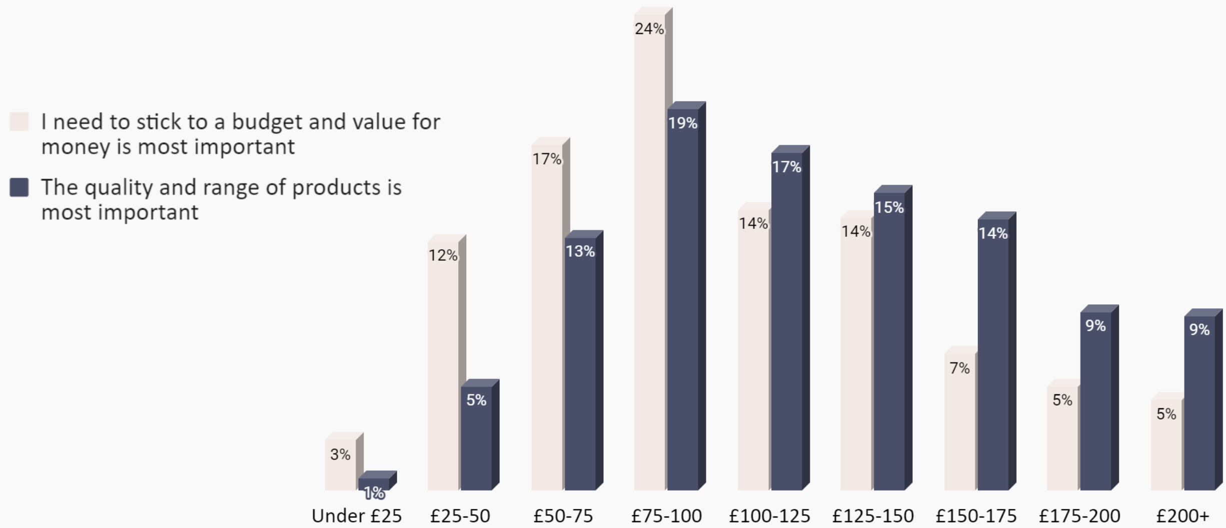


Fig. 17. Grocery shopping attitude segments by spending (n=1393)
Q. Which of the following statements best describes your attitude towards grocery shopping in person?/Q. In a typical week, how much does your household spend on groceries online?

The next questions used a scale with some attitudinal statements (both positive and negative) to identify key drivers for where to shop for groceries in person:

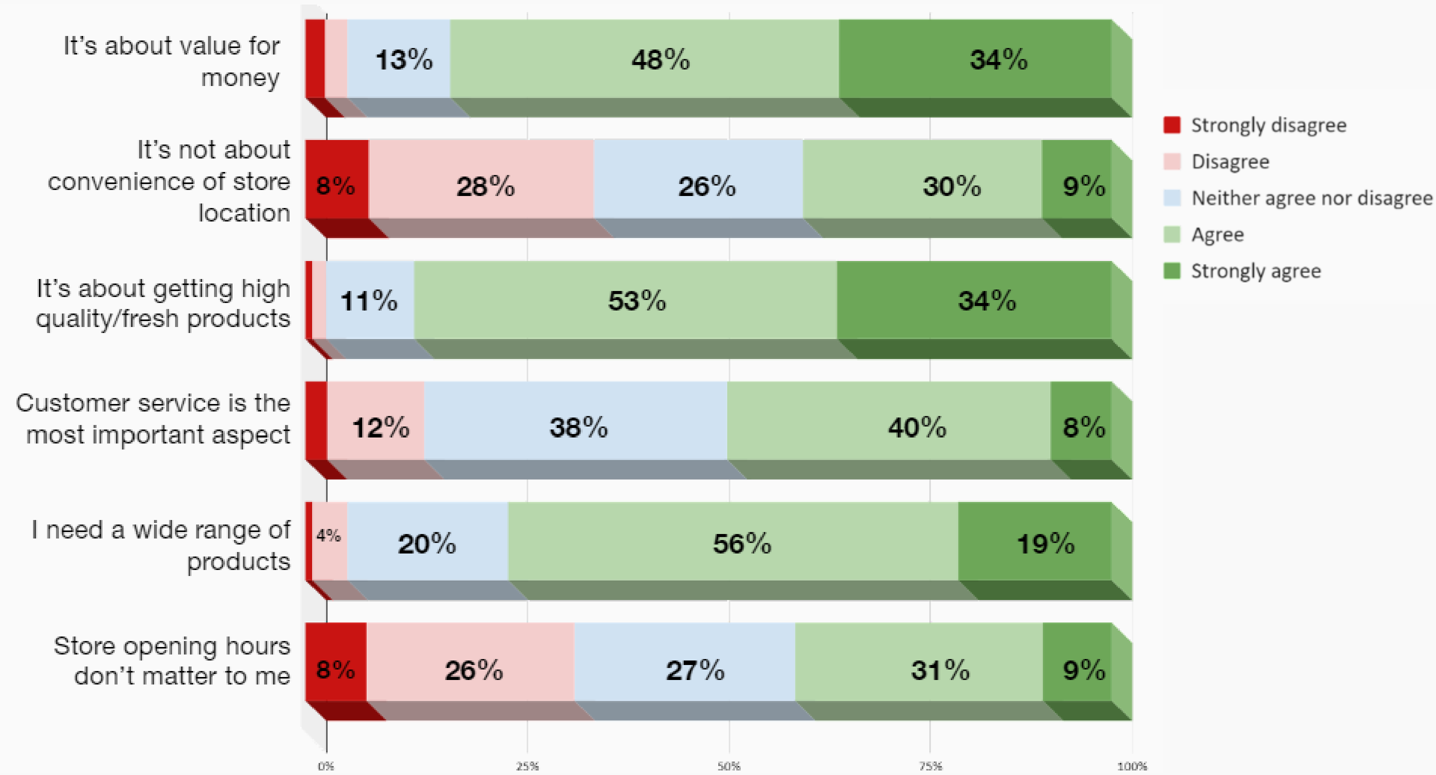


Fig. 18. Grocery shopping choice of location (n=1373)

Q. When thinking about where you choose to shop for groceries in person, do you agree or disagree with the following statements?

This again identifies value for money, high quality/fresh products and a range of products as key drivers, with 82%, 87% and 75% strongly agreeing or agreeing respectively. Responses were more mixed on the importance of store location, customer service and store opening hours.

A similar question and scale was used, but this time for online grocery shopping:

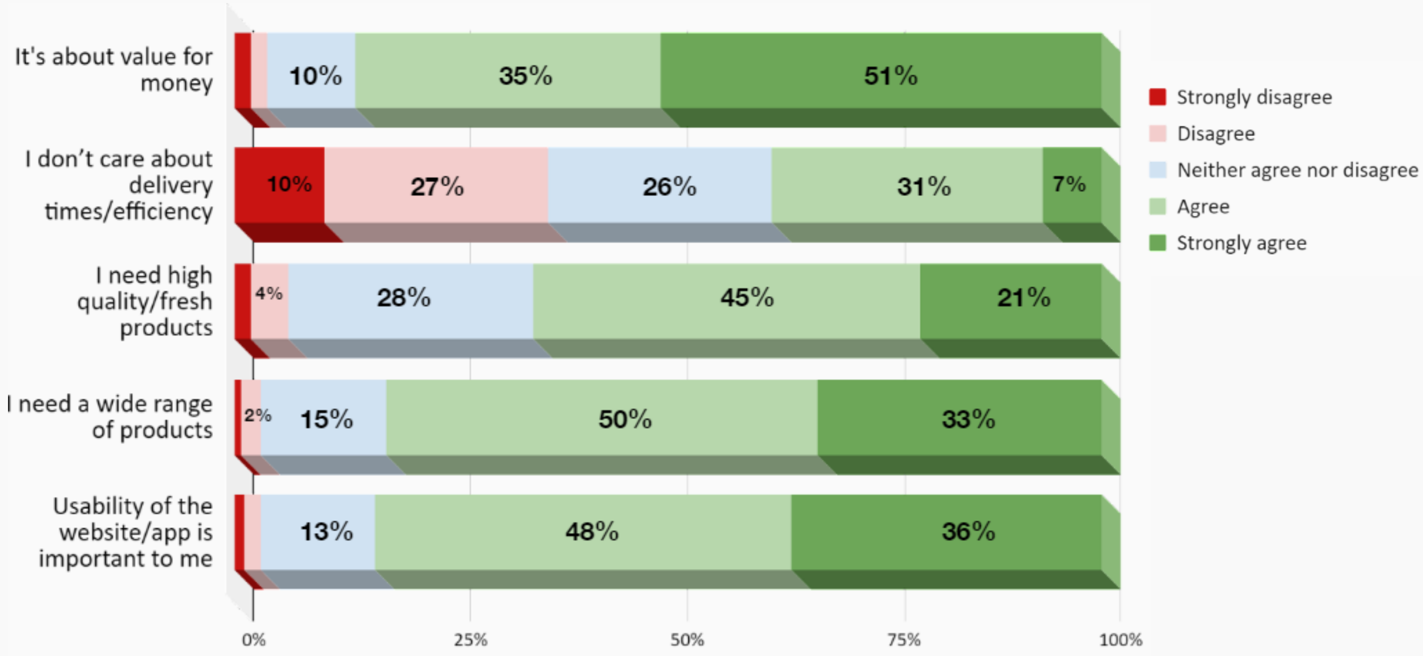


Fig. 19. Online Grocery shopping choice of location (n=378)

Q. When thinking about where you choose to shop for groceries online, do you agree or disagree with the following statements?

Value for money and a range of products were also identified as key drivers for where to shop for groceries online, with 86% and 83% strongly agreeing or agreeing respectively. Although 66% strongly agreed or agreed with the importance of high quality/fresh products, this was significantly lower than for in-person shopping (87%). This may be consistent with earlier behaviours, where respondents tended to use 'off-island online stores' more often for dried goods/pantry items and household goods.

Website/app usability can also be identified as a key driver online, with 84% strongly agreeing or agreeing with its importance. Respondents were fairly mixed on the importance of delivery times/efficiency.

Respondents were also asked to rate their experience of grocery shopping in Jersey, both in-person and online:

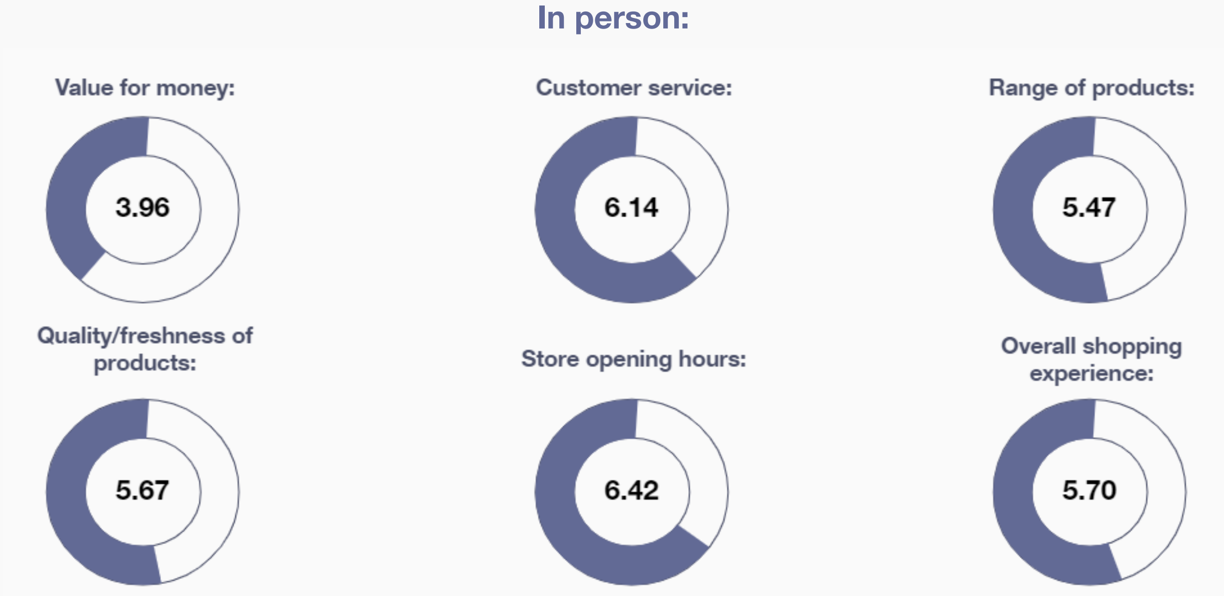


Fig. 20. Experience of Grocery shopping in person, mean scores (n=1310)

Q. Score out of 10 how you rate the experience of grocery shopping in person in Jersey for: (where 1 is very poor and 10 is excellent)

In-person grocery shopping rated 5.7 (out of 10) for overall shopping experience. Scoring particularly low in terms of value for money (3.96).

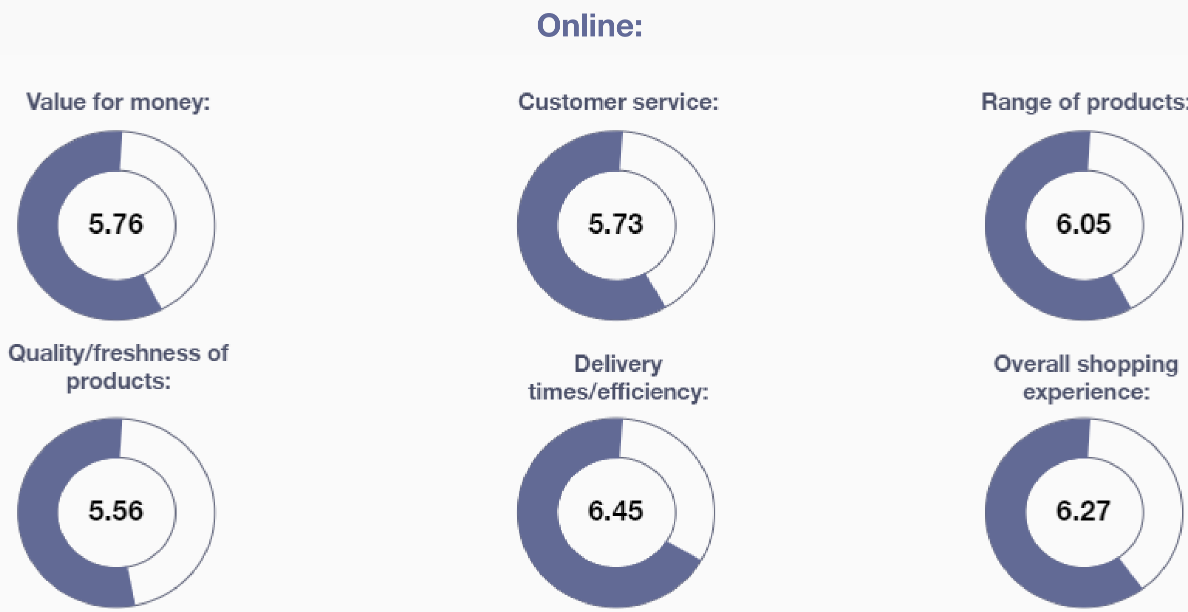


Fig. 21. Experience of Grocery shopping online, mean scores (n=383)

Q. Score out of 10 how you rate the experience of online grocery shopping in Jersey for: (where 1 is very poor and 10 is excellent)

Online grocery shopping was rated higher for overall shopping experience (6.27). Scoring slightly higher than in-person shopping, particularly in terms of value for money (5.76).

Respondents were also asked about shopping for groceries in the UK, to assess perceptions of how Jersey compares for grocery provision. Just under half of respondents had shopped for groceries in the UK within the last 12 months.

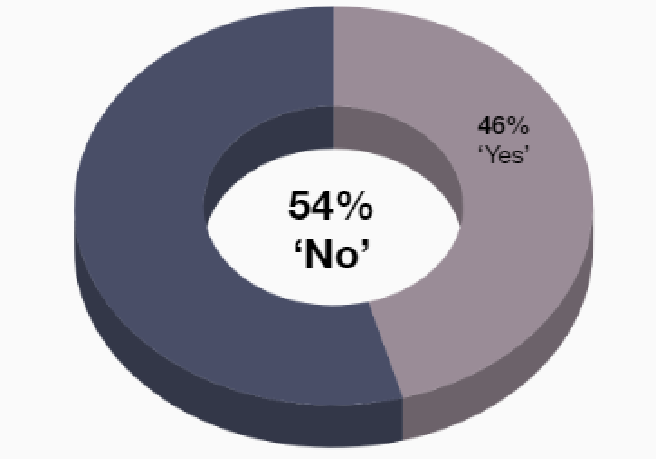
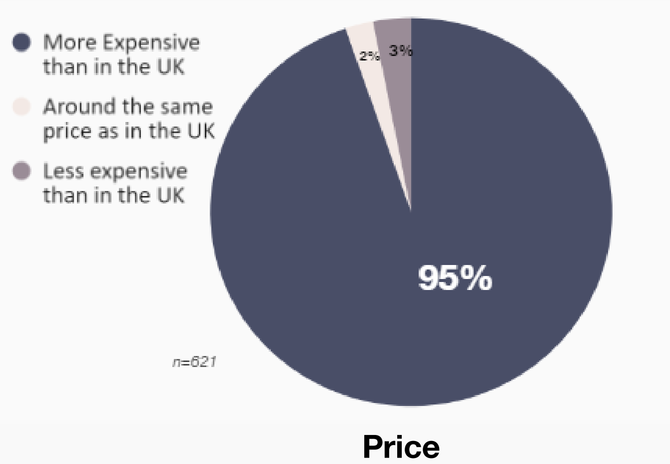


Fig. 22. Grocery shopping in the UK (n=1353)
Q. Have you shopped for groceries in the UK during the last 12 months?

Of those who had, 95% thought that grocery prices in Jersey are more expensive than in the UK. This negative sentiment was somewhat diminished, but still present in terms of quality and freshness of products, with 56% viewing available products as worse than in the UK and 35% 'about the same'. Just 5% felt that the quality/freshness of available products is better in Jersey stores.



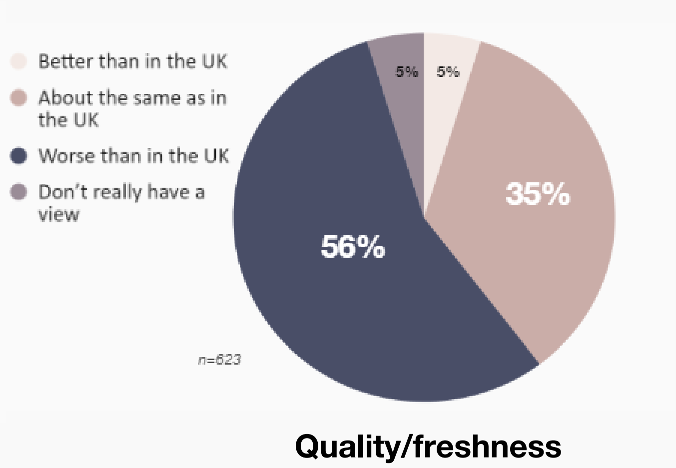


Fig. 23. Perceptions of Grocery shopping in the UK (n=621, n=623)
Q. In general, would you say grocery prices in Jersey are:
Q. In general, would you say the quality/freshness of products available in Jersey stores is:

Respondents were also asked how satisfied they are with the grocery shopping experience in Jersey, both in-person and online, on a scale of 'very unsatisfied' to 'very satisfied'.

For in-person grocery shopping, there were mixed satisfaction levels and no clear consensus emerged, with 35% 'very unsatisfied or unsatisfied', 27% 'neutral' and 39% 'satisfied or very satisfied'.

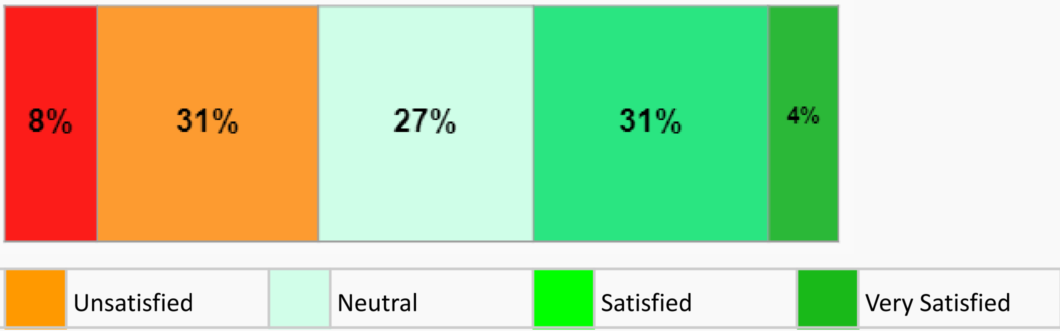


Fig. 24. In person satisfaction levels (n=1351)
Q. How satisfied are you with the grocery shopping experience in Jersey? (not including online shopping)

For online grocery shopping, there were higher levels of neutrality, with 68% of respondents 'neutral'. This is fairly consistent with levels of use (29% of all respondents shop for groceries online).

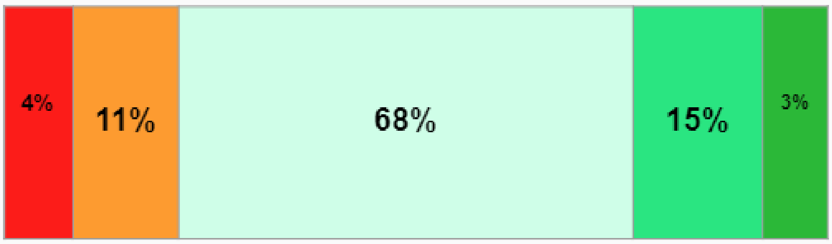


Fig. 25. Online satisfaction levels (n=1272)
Q. How satisfied are you with the online grocery shopping experience in Jersey?

Open-ended responses and calls-for

The final two questions of the survey were open-ended text boxes, giving respondents the opportunity to give their views on the grocery market in a more detailed manner. These questions received excellent engagement, with 1059 and 925 responses respectively.

The responses were coded, and the word clouds below give a visual representation of the sentiment of responses. The first open-ended question asked respondents was ‘What would improve your experience of grocery shopping in Jersey?’:

Make it more affordable x 607
Wider range of products x 251
Alternative supermarkets x 186
Improve product quality & freshness x 175
Improve product availability x 154
More local/sustainable products x 69

Fig. 26. Open-ended improvements (n=1059)
Q.What would improve your experience of grocery shopping in Jersey?

There were clear calls for lower prices and a more affordable groceries market, with 607 responses mentioning this in some form. Some respondents also called for alternative grocery options (186), with particular calls for more ‘budget’ competitors and a French supermarket. Responses also called for a wider range of products (251), for products to be of a higher quality/freshness (175) and to be more frequently available on shelves (154), with some stating concerns over the security of the grocery supply.

A selection of quotes from the first open-ended question:

Fig. 27. Open-ended improvements quotes (n=1059)
Q.What would improve your experience of grocery shopping in Jersey?

The second open-ended question asked respondents 'Is there anything that would significantly change your grocery shopping behaviour?':

Lower prices x 406
Already satisfied x 160
Alternative supermarkets x 118
Improve product quality & freshness x 89
Wider range of products x 78
More online shopping options x55

Fig. 28. Open-ended behaviour changes (n=925)

Responses to this question echoed the first, with calls for lower prices (406) and better 'value for money' so consumers don't have to shop around and can choose higher quality items. Respondents also called for an alternative or a 'budget' supermarket (118) which many respondents said they would opt for over the current options. A higher quality and freshness as well as a wider range of products were also seen to change behaviours (89, 78). There were also some calls for more local online shopping and delivery options (55).

A selection of quotes from the second open-ended question:

Fig. 29. Open-ended behaviour quotes (n=925)
Q. Is there anything that would significantly change your grocery shopping behaviour?

Appendix

Survey Demographics

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

The survey incorporated demographic questions, to gather a range of demographics. The results found a diverse mix of socio-demographics such as age (16+), gender, Parish, income, household size and employment sector. It was key to target a reasonably statistically representative sample of islanders to effectively understand the groceries market.

Age:

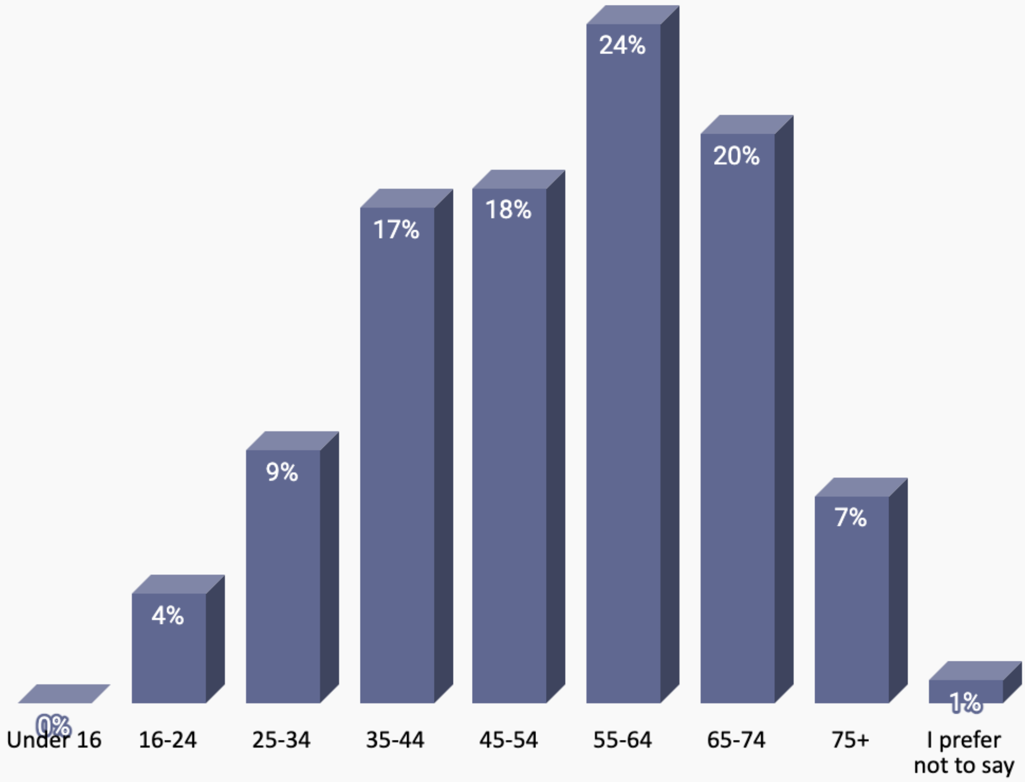


Fig. 30. Survey demographics - ***age*** *[n=1579]*

Parish:

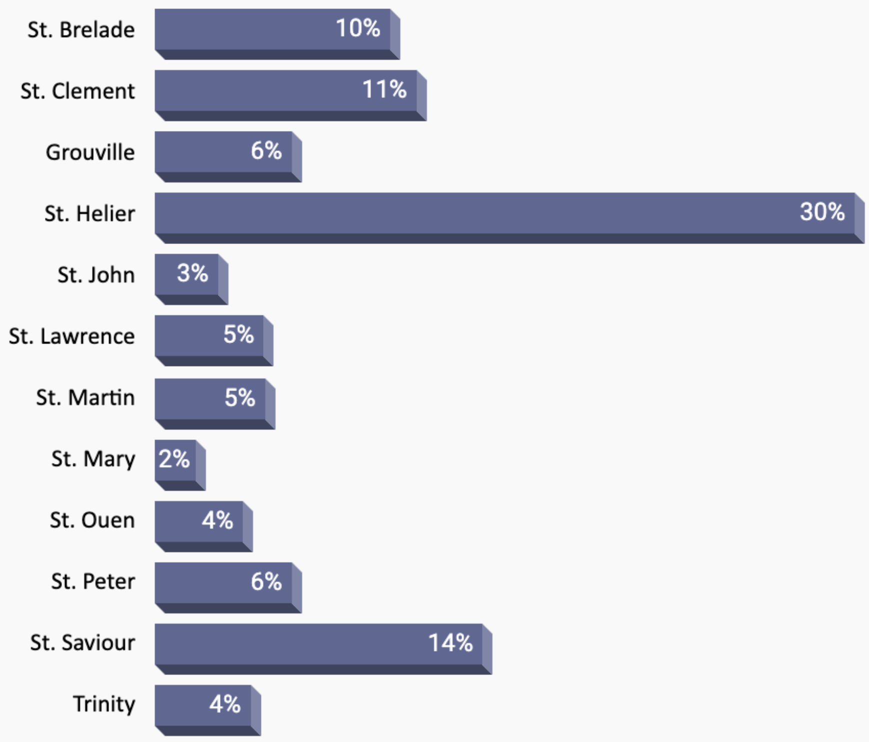


*Fig. 31. Survey demographics - **parish** [n=1579]*

Work situation:

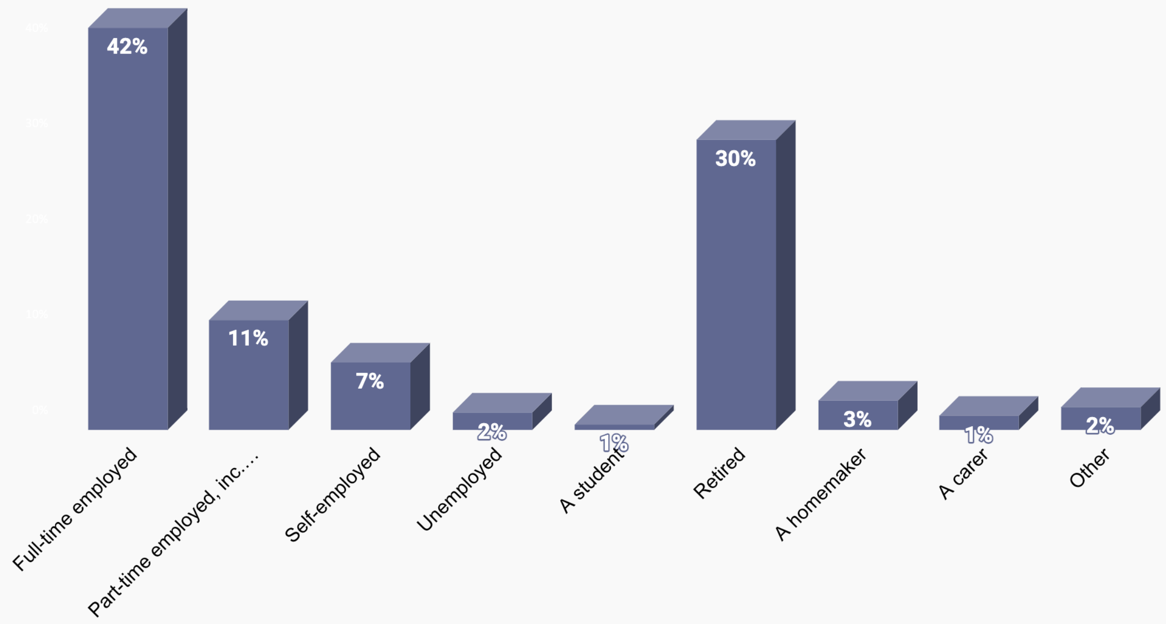


*Fig. 32. Survey Demographics - **work situation** [n=1322]*

Gender:

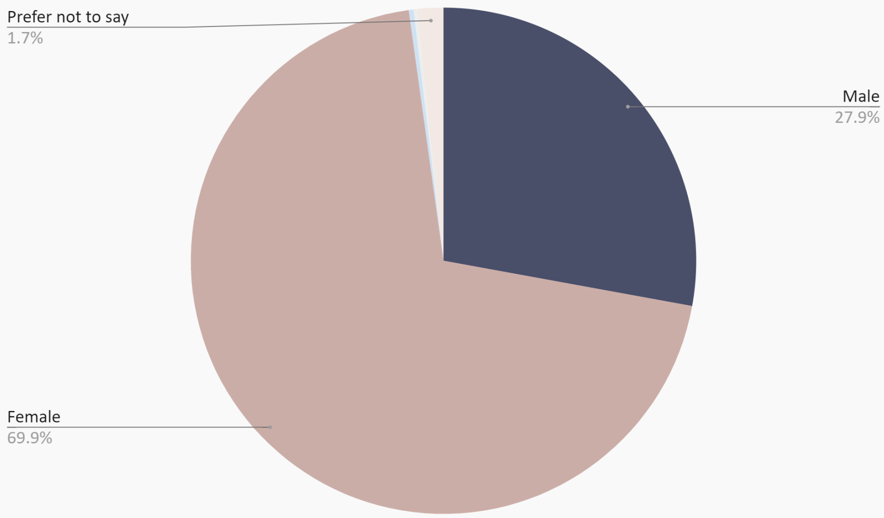


*Fig. 33. Survey Demographics - **gender** [n=1317] (non-binary 0.3%, other 0.2%)*

Household Size:

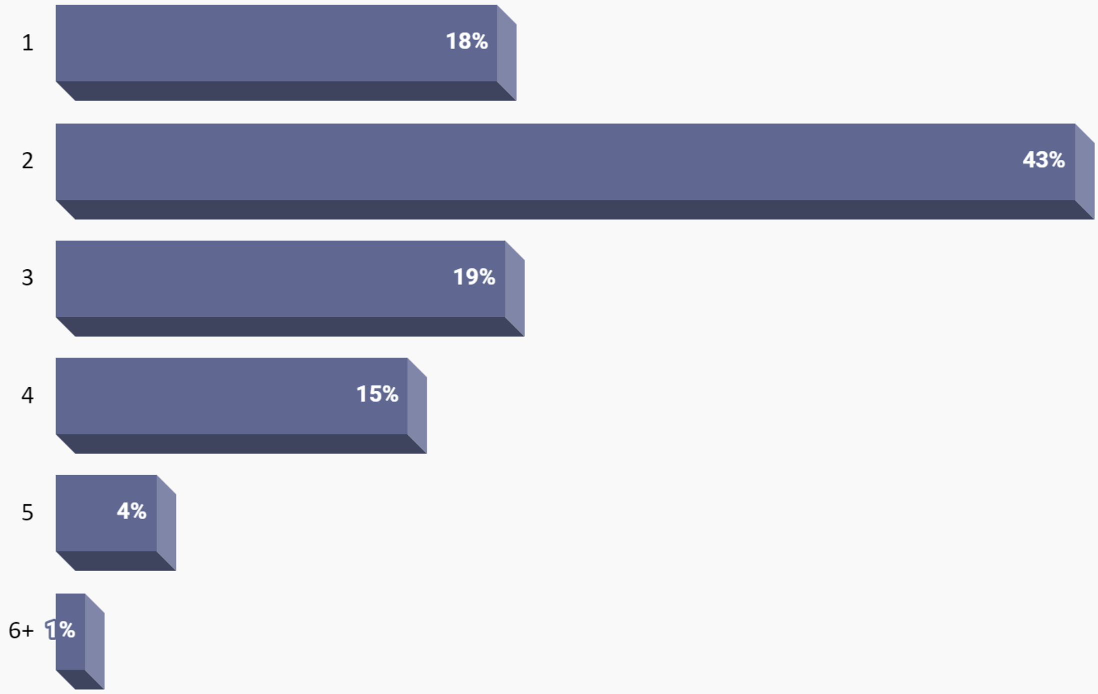


*Fig. 34. Survey Demographics - **Household size** [n=1310]*

Total Household Income:

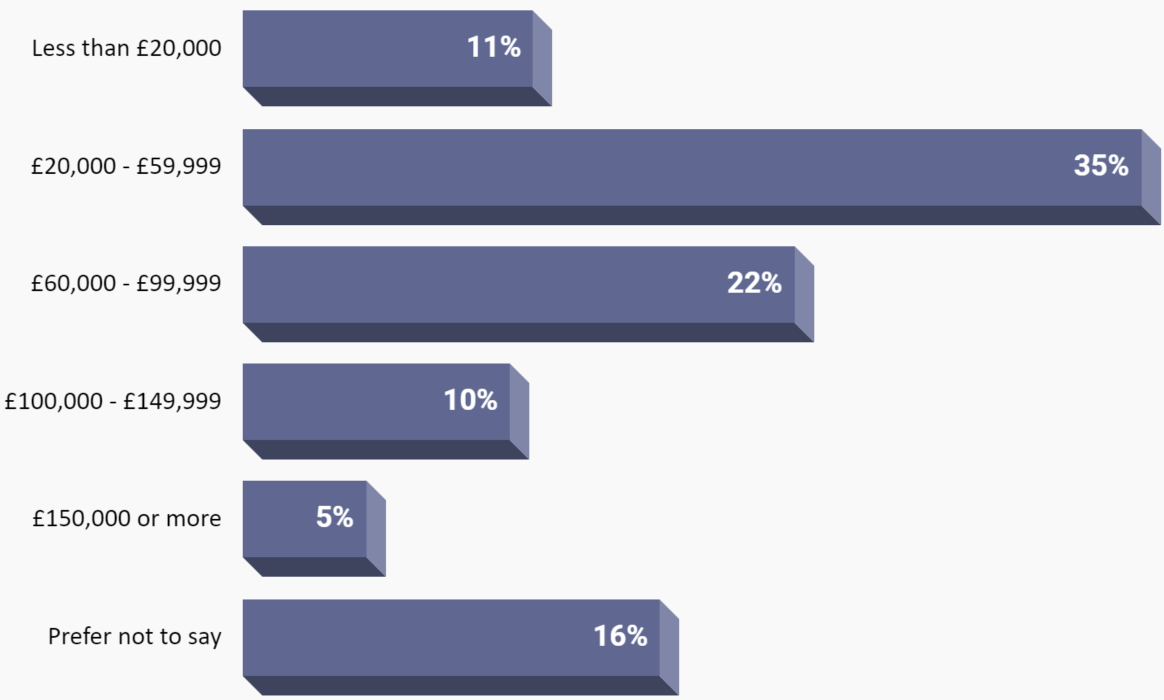


*Fig. 35. Survey Demographics - **Household Income** [n=1307]*

Industry:

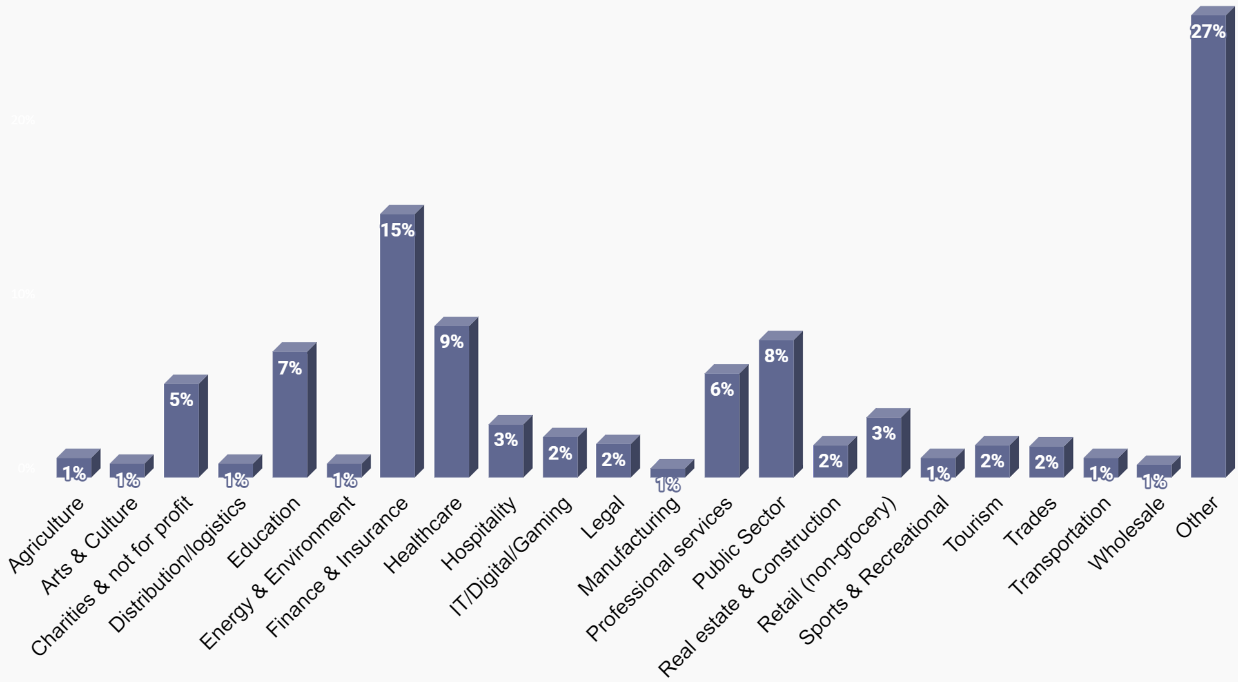


*Fig. 36. Survey Demographics - **Industry** [n=1138]*

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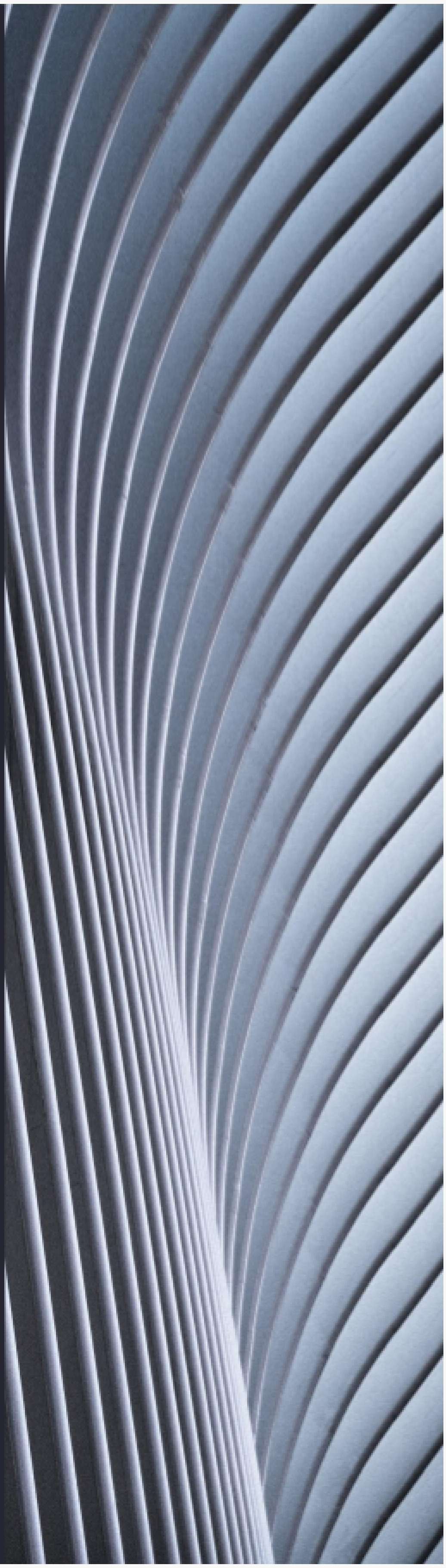
Groceries in Jersey



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