

4insight

Postal Services in Jersey

Research Report

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Authority
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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, to inform the strategic review of postal services in Jersey.

The research explored respondents' usage, habits, perceptions and key needs from postal services in Jersey through both qualitative focus groups and a quantitative semi-structured survey which generated a statistically representative sample size for Jersey. The qualitative research addressed both consumer and business usage, while the quantitative survey focused on consumer only.

Qualitative findings included participants sending and receiving parcels more frequently than letters and clear positive associations with customer service experiences. Speed of delivery was perceived as inextricably linked to consistency of delivery. Participants perceived costs as reasonable when sending locally in Jersey, however outbound post to other destinations was seen as overly expensive. The SecureDrop service was valued exceptionally by participants and there were mixed views on accessibility and postbox closures with no clear consensus.

In terms of improvements, there were clear calls for a more accurate tracking system, particularly for parcels. Respondents understood the impact of wider influences like Covid-19 and the UK postal strikes on levels of service, but there was some resistance to further increases in automation, with postal workers and their efforts highly valued.

Building upon these insights and the key issues uncovered, quantitative findings show that the majority of respondents receive between 1 to 6 letters in an average week and send under 3 letters in an average month, with 33% sending 0 letters each month. In terms of speed expectations for letters, 94% expect delivery in one or two working days when sending locally and 79% expect delivery in two to three working days when sending to the UK.

For parcels, 65% of respondents had their last parcel delivered by Jersey Post and nearly half estimate they receive 1 to 2 parcels in an average week. In terms of speed expectations, 78% expect delivery in one or two working days when sending locally and most expect delivery in three working days to within a week when sending to the UK. Respondents expect to receive fewer letters but expect to receive about the same amount or more parcels in three years time.

Echoing findings from the qualitative research, reliability was perceived as the most important need for both sending and receiving parcels. Through attitudinal statements, 96% of respondents agreed that they value postal delivery to their door. Customer service rated highest and cost rated lowest for experiences for both letters and parcels. Open-ended questions, which gave respondents a chance to give their views in more detail reaffirmed this, with a high portion valuing customer service and postal delivery to their door.



About the Research

Research Aim & Objectives

The **research aim** was to explore islanders' views on postal services in Jersey and identify future needs.

Specific objectives included:

- identifying awareness levels of the postal services in Jersey
- identifying postal behaviours and usage, by both residential and business
- exploring end users' views on postal services, are needs met?
- identifying key needs and any potential innovations/new processes
- exploring wider influences e.g. Brexit, Covid-19, sustainability, staffing issues, operational cost

Scope, Sample & Methodology

Scope:

Jersey islanders aged 17 years and older.

Sample:

Recruitment for both the online survey and focus groups was through:

- 4insight's online panel of 4,400+ (reasonably representative for Jersey)
- 4insight social and traditional media
- Authority press release plus social and traditional media
- Street interviewers (CAPI) on iPads addressing any demographic segment gaps for the survey

The focus group recruitment was based upon a screener questionnaire form developed by 4insight and agreed by the Authority prior to use. The screening questions ensured that we included a diverse mix of socio-demographics for example a mix of ages, Parishes, income level etc.

The online survey contained some screening questions to enable profiling and cross tabulation production, this included demographics, socio-economics and postal behaviours.

Blended Methodology:

4insight suggested a combination of both qualitative and quantitative methodology in order to generate a greater level of insight addressing the research objectives and building confidence in the research findings through the quantitative, with a good statistically representative sample size.

Qualitative:

Conducting focus groups ensured that we got the level of depth & understanding needed from both the rational and emotional perspective of users' views on postal services in Jersey.

4insight held **2 focus groups** generating a sample of **15** across the various different socio-demographics. Each of these groups included participants who also use postal services as part of their business or job role.

Each focus group lasted about 90 minutes and was conducted to a discussion/topic guide developed by 4insight which was agreed prior to use by the Authority. Projective and enabling techniques within the focus group methodology were utilised to explore perceptions at an individual and emotional level.

The qualitative focus groups were professionally facilitated/moderated by 4insight with initial scene setting regarding how a mix of views is acceptable etc., and utilising Neuro Linguistic Programming (NLP). With these 2 approaches together 4insight eliminated any potential 'group think', framed the discussion and questions, eliciting perceptions and forward ideas in their representative style.

All groups were held at 4insight's professional viewing facilities with one way mirrors to allow the Authority key team members to listen/observe live, not risk biasing responses by being present, plus allow for extra questions to be asked before the groups closed.

All groups were digitally recorded and professionally analysed addressing behavioural aspects and potential levers.

Quantitative:

To build upon qualitative findings, 4insight used a follow-up online survey that was semi-structured with a mix of closed questions and semi-structured questions e.g. statement agreement options, plus 2 truly open-ended questions. The focus groups informed the design of the quantitative survey. The survey focused on consumer use of postal services, this approach was agreed with the Authority to help streamline the questionnaire and simplify analysis.

4insight designed the online survey questions in a Word document for review and sign off, then programmed it into professional survey software. 4insight sent the survey link to the Authority for review and sign off. The first question was an age question, as under 17 year olds require parental permission to participate 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. To be inclusive, hard copies of the survey and a phone-in option were also available. In addition street interviews were conducted by interviewers with iPads at several island locations to obtain a good representative sample across the various socio-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 21st March and closed on 12th April 2023. The street interviews, (CAPI) were conducted in the last week of fieldwork addressing any socio-demographic gaps in the completed online responses.

In total the survey received **930** responses after quality checks and data cleaning, which is a good statistically representative sample size, (a sample size of 730 is statistically representative for Jersey).

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Research Results



Qualitative Research

First Words/Associations

In order to gauge initial perceptions and sentiment, participants were asked to write down the first words that come to mind when they heard the words “postal services in Jersey”. When these responses were analysed, 10% were positive, 15% were negative and 75% were factual. There were more associations with parcels and packages than letters and as discussions progressed multiple participants associated positive customer experience with postal services in Jersey. There were some potential negatives identified through initial perceptions, particularly related to cost and capabilities.



Fig. 1. First words/associations - “Postal services in Jersey”

Q. Please write down the first words/associations that come to mind when I say... “Postal services in Jersey”

Postal Behaviours

Overall, participants tended to send and receive parcels more often than letters.

For letters, participants reported receiving a higher number of letters than they send, primarily from the government or bills etc. Outbound usage varied with one participant sending letters on a daily basis, while others sent one or two each year. The majority indicated they send at least a few birthday and Christmas cards a year.

A portion of parcel usage was attributed to returns, with some participants frequently using returns services (one participant did so 2 to 3 times each month). Some negativity emerged around the returns process, with some experiencing challenges.

A selection of quotes from the discussion:



What's Most Important?

Participants emphasised the importance of post arriving within a 'reasonable' time frame (a notion that was explored further through quantitative research). Reliability was closely linked to speed, with importance placed on consistent, efficient and secure (undamaged) delivery. Some participants mentioned accessibility and the convenience of having a local post office was

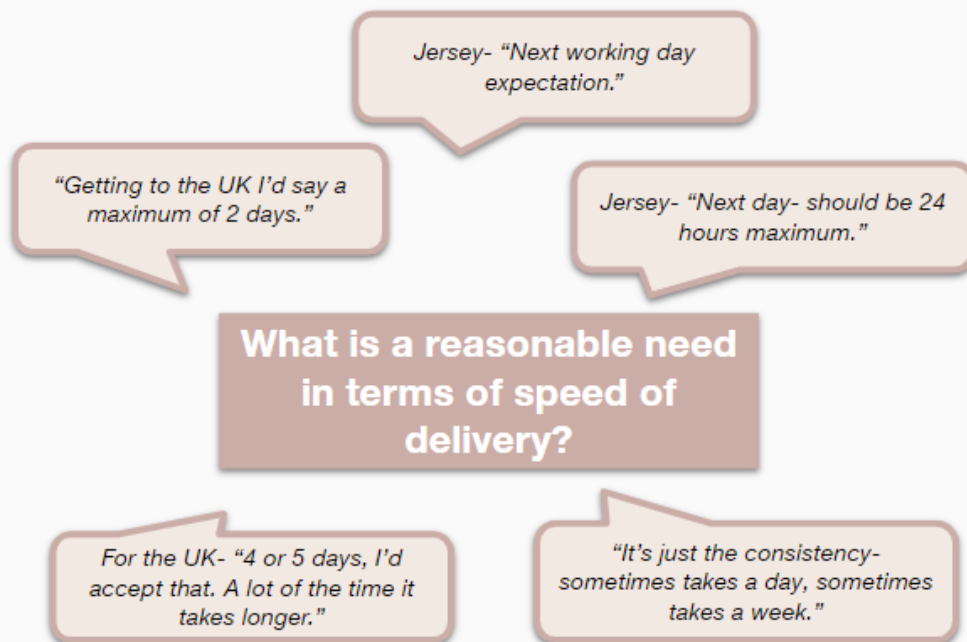
valued, perceptions of the inaccessibility of Jersey Post Rue des Pres Headquarters also came through in discussions.



Delivery Speed Expectations

When probed on 'reasonable' delivery speeds for both letters and parcels, there was a clear expectation for next working day delivery locally. For post to and from the UK respondents expected parcels to arrive within 3 to 5 days. For post to and from outside the UK, respondents expected around 1-2 weeks delivery. One participant reported long delays when sending and receiving post from Ireland, while another expressed negative experiences sending and receiving from Europe, with a particular card taking 3 months to arrive.

Generally, delivery times were perceived as inconsistent, particularly for posting outside of Jersey. Respondents would like to have a more standardised, reliable and guaranteed timescale of how long post will take rather than respondents having to post weeks in advance just in case it doesn't arrive in time. Overall there was minimal tolerance for delivery speeds being slower than current levels.



Work/Business Postage

For workplace/business use, participants tend to use alternative courier services, particularly for posting important documents for increased reliability, security and better tracking. Some stated they do not trust Jersey Post enough to use them to send and receive important documents and there were experiences of a number of losses posting via Jersey Post. One respondent who worked in Finance said their workplace often chooses to hand deliver important documents rather than use Jersey Post or alternative courier services.

Security and reliability were valued more for workplace postage, with speed being a secondary concern. A few respondents said their workplace is trying to become paperless but this depends on client preferences.



Perceptions of Postal Services

Discussions then elicited experiences and needs from participants across a range of issues.

Speed:

Participants generally had positive experiences posting within Jersey, delivery speeds were perceived as reasonable. However experiences were inconsistent when sending post out of the island.

Reliability:

Reliability was seen as fairly inconsistent overall and generally 'hit and miss' particularly when sending parcels outside the Island. A couple of respondents called for more reliable and consistent delivery times each day and there was some confusion and limited awareness around Saturday postal delivery in the island.

Cost:

Cost was generally perceived as reasonable within Jersey, however there was consensus that postage costs outside of Jersey, both to the UK, Europe and Internationally, are too expensive. Some respondents mentioned that postage of an item often costs more than the item itself.

Access Points:

There were mixed views on access points such as postboxes and post offices, some reported disappointment at the amount of postboxes now closed whilst others would be quite happy to have all post boxes closed as they primarily use the Broad Street post office. The majority of participants used the SecureDrop service which was viewed exceptionally positively in all the focus groups. The location of the Rue des Pres facility was again perceived as inconvenient and somewhat inaccessible.

Tradeoffs & Tolerance to Change

Participants had some willingness to trade 'pure speed' of postal delivery for improved accuracy and reliability, however there was not a clear consensus. Some respondents said they would be willing for the post to take an extra day or 2 to arrive as long as the expected delivery date was accurate and consistent. Both groups demonstrated an understanding of the impact of Covid-19 and UK postal strikes on delivery times/levels of service.

There was little to no tolerance to price increases in both groups, especially for posting items outside of the UK where prices were already perceived as too expensive. There was a lack of tolerance also clear for the removal of home delivery services, or suggestions of a central collection point. Participants were also hesitant to support further moves towards automation with human customer service, postal workers and the Broad Street central office clearly valued.

Sentence Completion

Individual sentence completion exercises were conducted near the close of each focus group which capture the participants key takeaways after expressing their own views and reflecting upon the discussions held within the groups.

The first sentence completion exercise asked participants to complete the following sentence ***"One thing I value about postal services in Jersey is....."***.

Reliability was the most commonly mentioned value followed by daily/regular delivery and trustworthy/secure delivery.

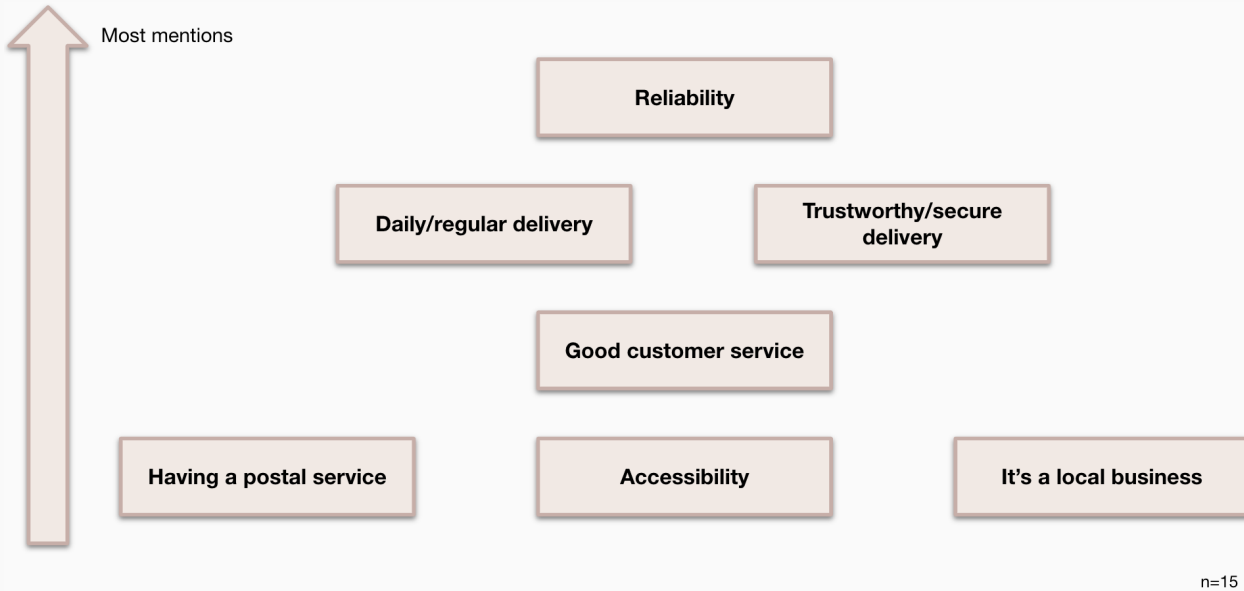


Fig.2 Sentence Completion 1

The second sentence completion exercise asked participants to complete ***“The aspects of postal services in Jersey I couldn’t tolerate changing are……”***.

Delays in delivery speed were the most frequent intolerance and any decrease in customer service.

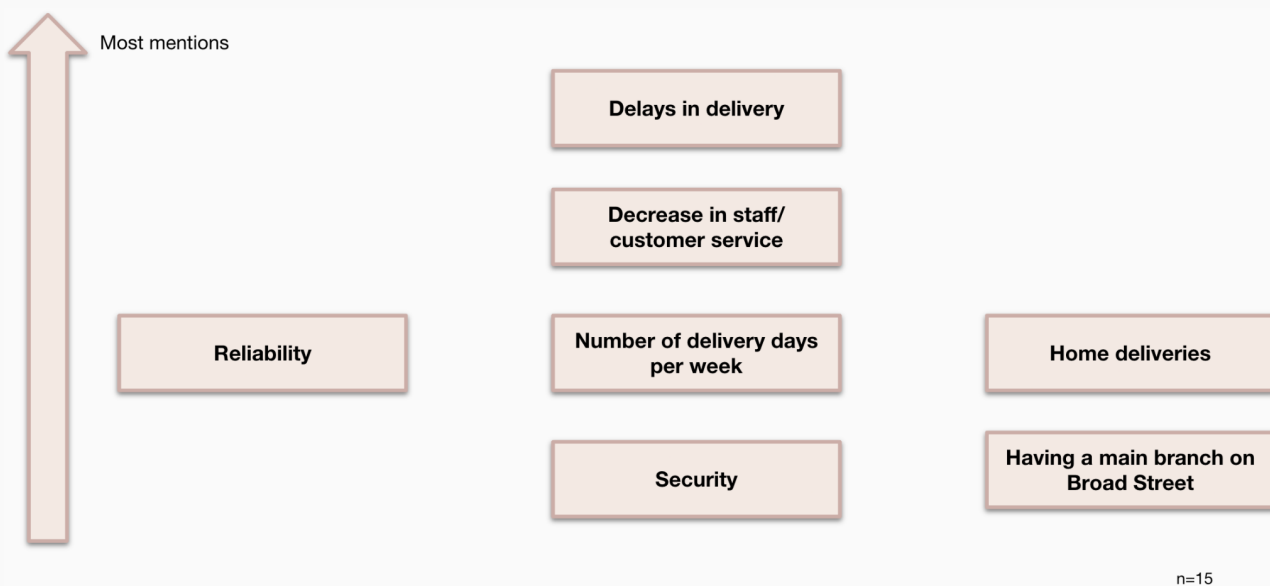


Fig.3 Sentence Completion 2



Quantitative Research

After initial screening questions, the quantitative survey made a clear distinction between **letters** (personal letters, including large letters up to 750g and 20 mm thick, however not any business letters) and **parcels** (personal parcels, including large parcels up to 30kg, however not any business parcels). Initial questions asked about these separately, to avoid the chance of any potential confusion.

Letters

The majority of respondent households receive between 1-6 letters each week, with 75% selecting brackets between 1-6. '1 to 2' letters each week was the most commonly selected option at 27%.

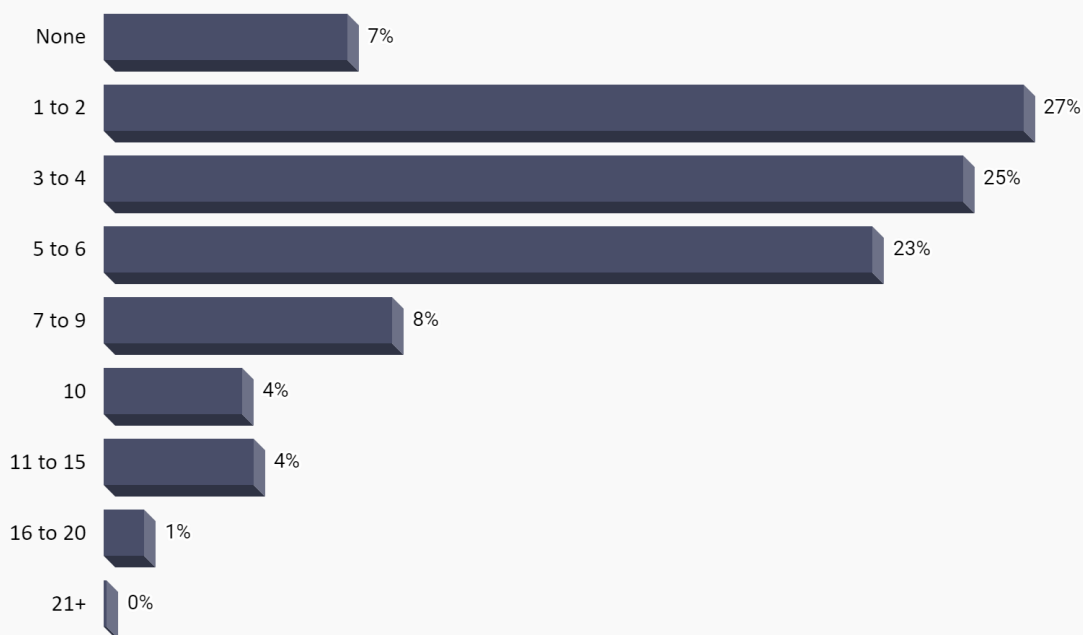


Fig.4 Letters received (n=910)
Q. Approximately how many letters does your household receive in an average week?

When looking at cross-tabulations run by age, younger people tended to receive fewer letters, with 48% of 17-44 year olds receiving 'None' or '1 to 2' letters in an average week. Comparatively, 77% of those age 75+ receive 3 or more letters.

In terms of sending letters, the vast majority of respondents send under 3 letters in an average month, with 33% of respondents sending '0' letters. 7% of respondents send '8+' letters each month.

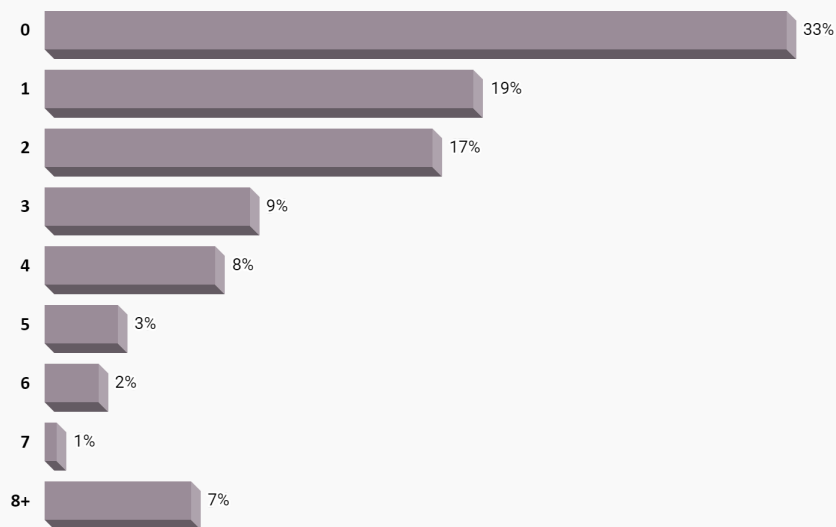


Fig.5 Letters sent (n=910)

Q. Approximately how many letters do you personally send in an average month?

Retirees demonstrate a higher propensity for sending letters. Of those who are retired, 82% send 1 letter or more each month. Comparatively, when looking at those aged 17-34, 53% send '0' letters in an average month.

The next questions probed those who send letters on what they think is 'reasonable' in terms of delivery speed. For sending letters locally (to a recipient in Jersey), 94% of respondents expect delivery in one or two working days. With 59% selecting 'next working day'.

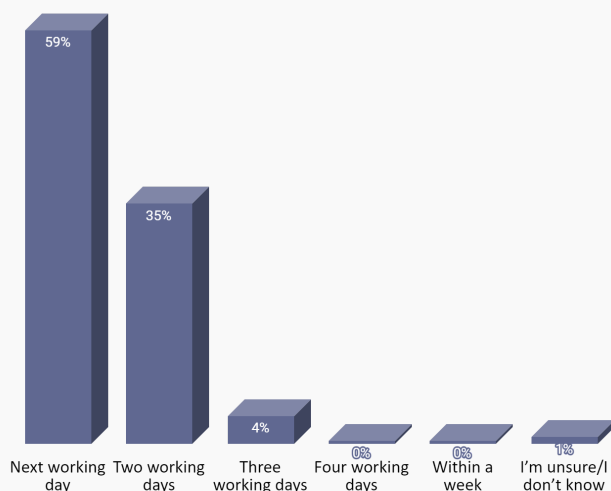


Fig.6 Speed expectations locally (letters) (n=660)

Q. When sending letters locally (to a recipient in Jersey), what do you think is reasonable in terms of speed of delivery?

For speed when sending to the UK, 79% expect delivery in two or three working days. 'Three working days' was most commonly selected at 42%.

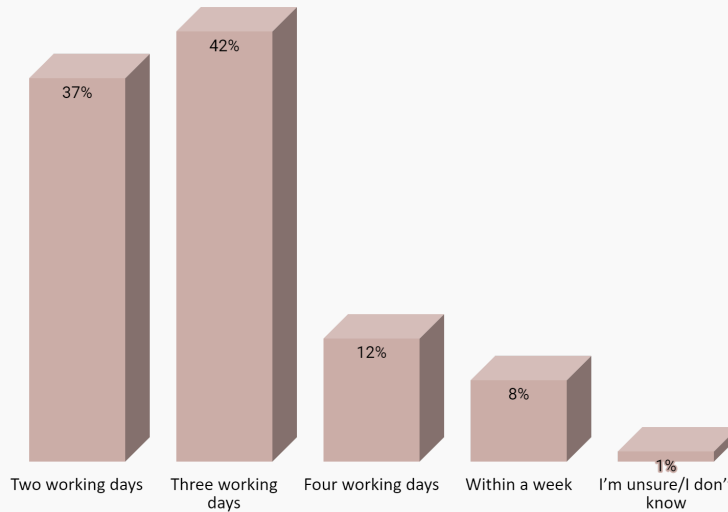


Fig. 7 Speed expectations to the UK (letters) (n=659)

Q. What about when sending letters to the UK, what do you think is reasonable in terms of speed of delivery?

When looking to the future, respondents expect to receive fewer letters in three years' time, with 90% of respondents expecting to receive 'about the same' number, 'slightly less' or 'much less' in three years' time.

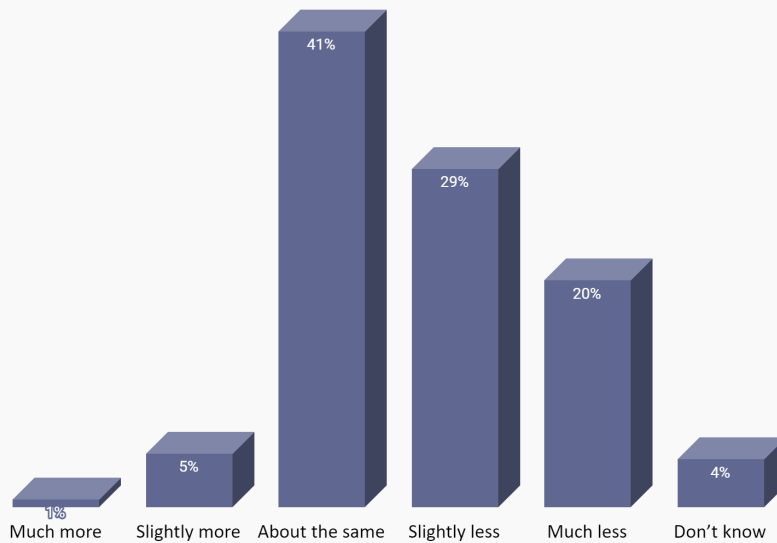


Fig. 8 Three years time (letters) (n=903)

Q. In three years time, do you think you will.....Receive more, fewer or about the same amount of letters??

Parcels

The first question on parcels asked respondents to think about which provider delivered the last parcel they received. Most had it delivered by Jersey Post, which was selected by 65%. Next was Evri (Hermes) which was selected by 19%.

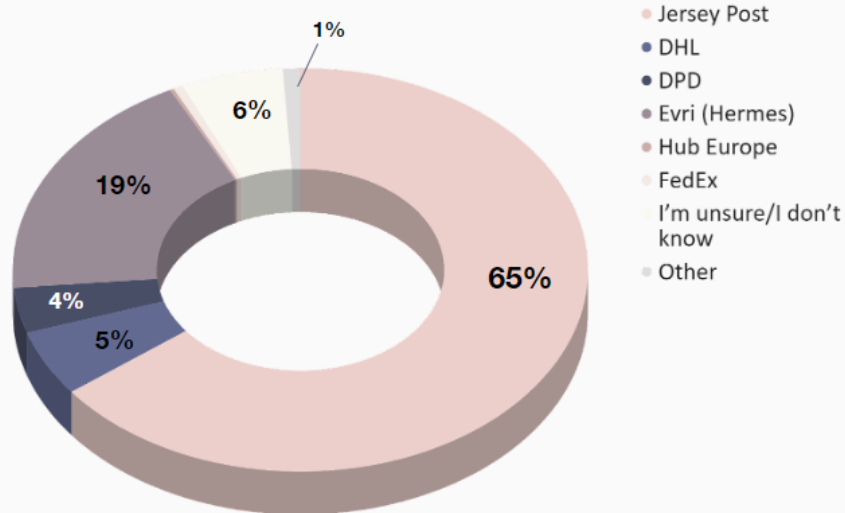


Fig.9 Delivered last parcel (n=908)

Q. Who delivered the last parcel you received?

Nearly half of all respondents receive '1 to 2' parcels in an average week, this was by far the most commonly selected option at 46%. 40% of respondent households are receiving 3 or more parcels each week.

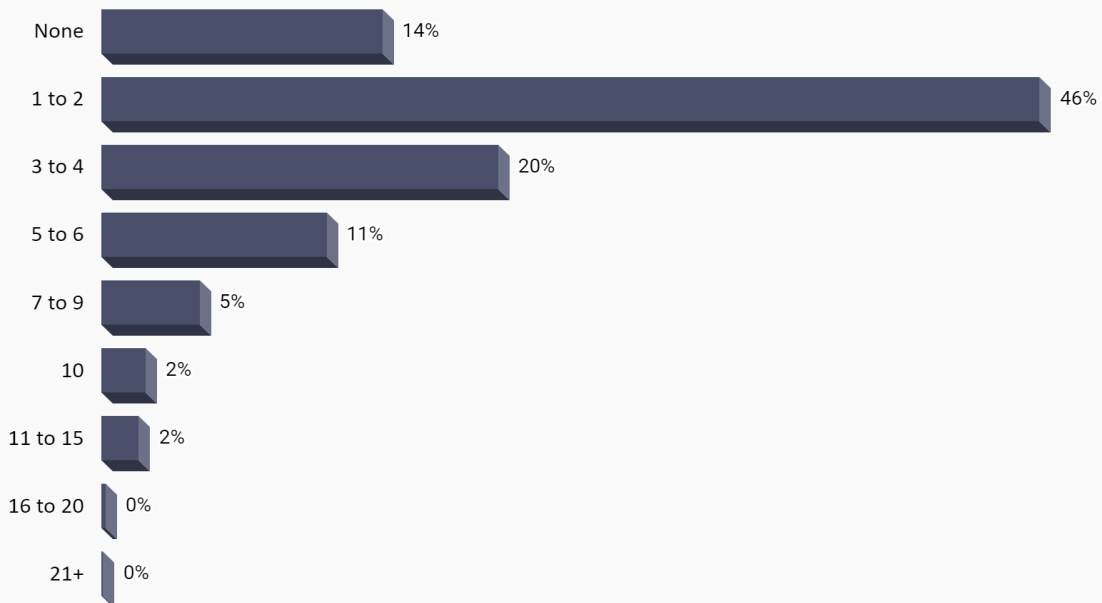


Fig.10 Parcels received (n=910)

Q. Approximately how many parcels does your household receive in an average week? (Including parcels picked up from another location or sent to a work address.)

When looking at cross-tabulations against respondent household income bands, those with a higher income are receiving more parcels. Of households with an income over £100k, 62% receive 3 or more parcels each week.

Most respondents don't send any parcels through local postal services in an average month, 57% selected '0'.

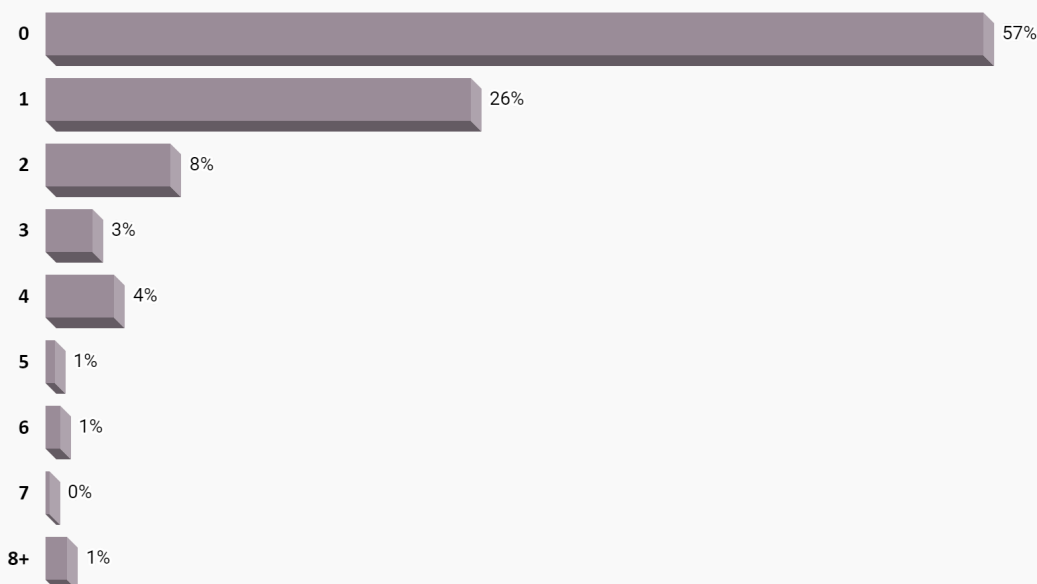


Fig.11 Parcels sent (n=910)

Q. Approximately how many parcels do you personally send through local postal services in an average month?

Younger people tend to send a higher number of parcels. 17% of 17-34 year olds send 4 or more parcels in an average month compared to just 7% when looking at the whole sample.

Those who do send parcels were then probed on what they think is a 'reasonable' delivery speed. For sending locally, the vast majority expect delivery 'next working day' or in 'two working days'. 'Two working days' was the most frequently selected option at 45%.

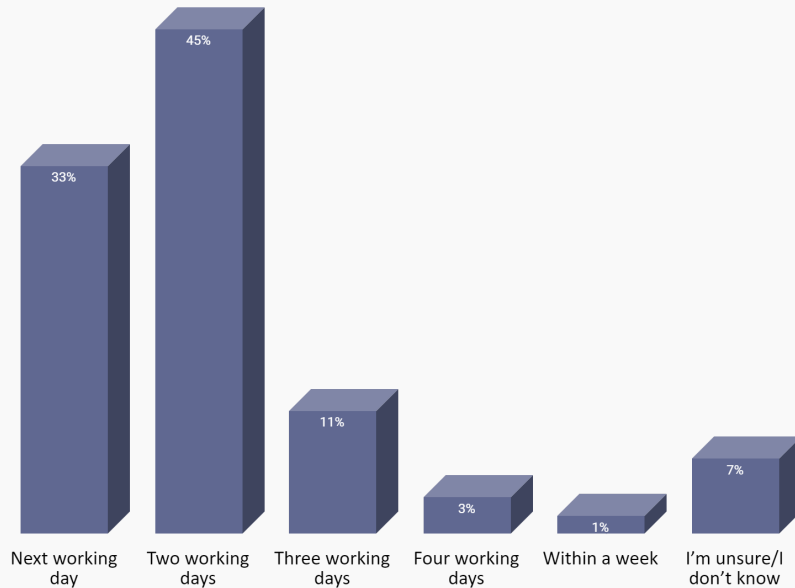


Fig.12 Speed expectations locally (parcels) (n=467)

Q. When sending parcels locally (to a recipient in Jersey), what do you think is reasonable in terms of speed of delivery?

For sending parcels to the UK, most expect delivery between 'three working days' and 'within a week'. 78% of respondents selected 'three working days', 'four working days' or 'within a week'.

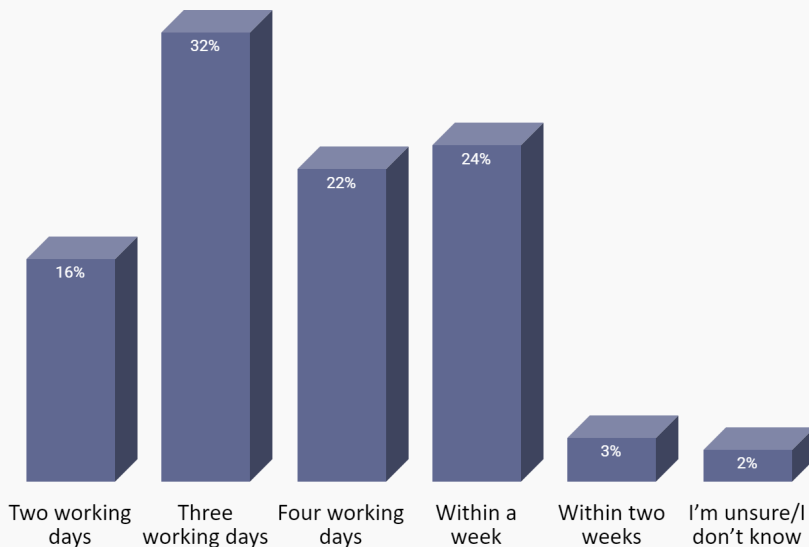


Fig.13 Speed expectations to the UK (parcels) (n=467)

Q. What about when sending parcels to the UK, what do you think is reasonable in terms of speed of delivery?

In contrast to the earlier question concerning letters, respondents expect to receive about the same amount of, or slightly more parcels in three years time. 87% of respondents expect to receive 'about the same' number, 'slightly more' or 'much more'. The most commonly selected option was 'about the same' at 44%, followed by 'slightly more' at 35%

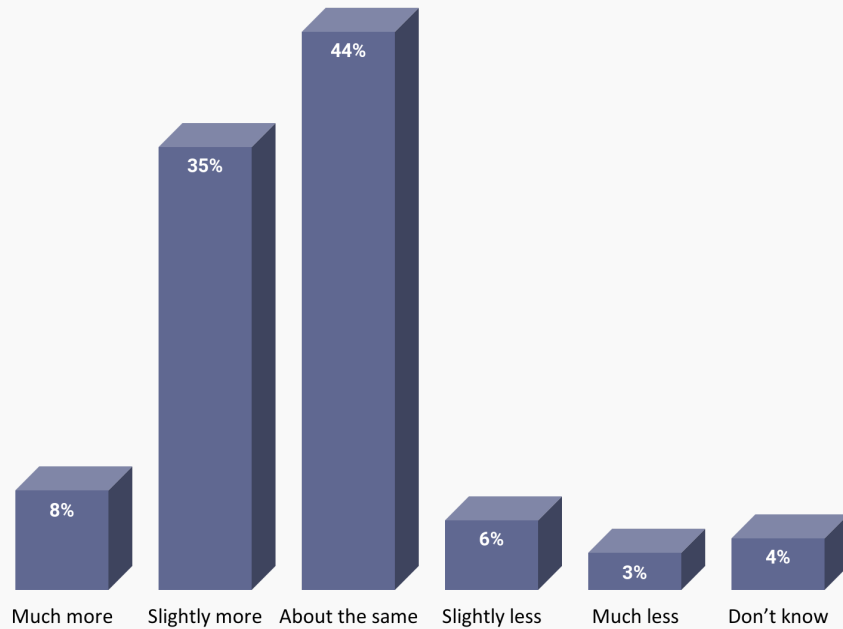


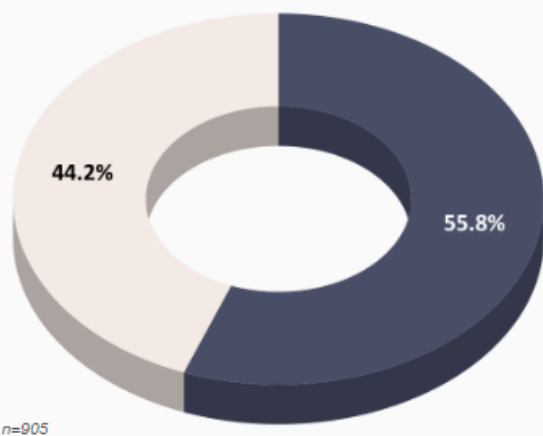
Fig.14 Three years time (parcels) (n=905)

Q. In three years time, do you think you will... Receive more, fewer, or about the same amount of parcels?

Over half (56%) of the respondents use the secure drop service for receiving parcels, whereas only 9% had used the postal lockers.

Q. Do you use the secure drop service for receiving parcels?

● Yes
● No



Q. Have you used the postal lockers to receive parcels?

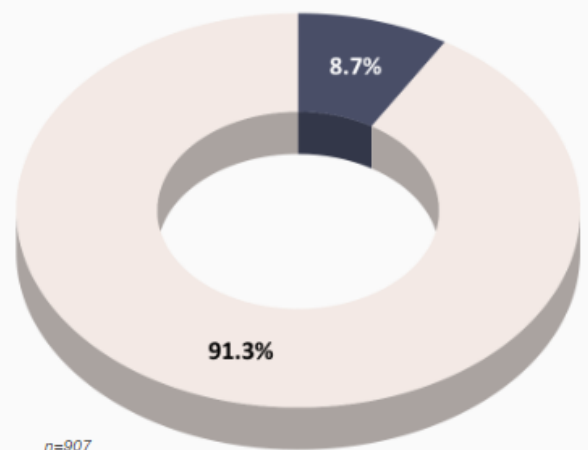


Fig.15 Secure drop/postal lockers

Other destinations

The quantitative survey also gauged the use of local postal services for sending letters or parcels to other destinations. Just 8% of respondents send letters or parcels to Guernsey.

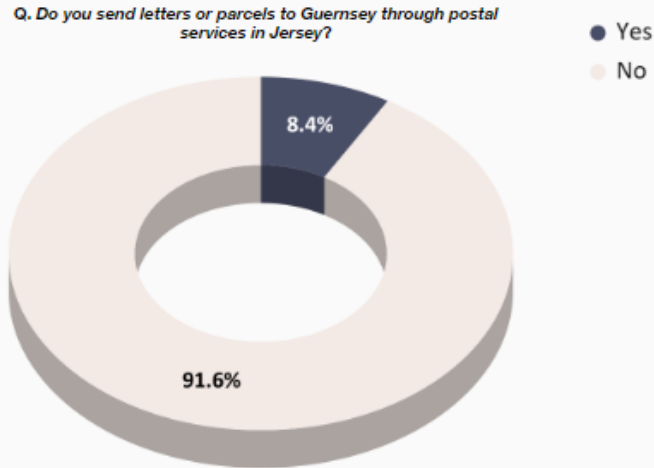


Fig.16 Sending to Guernsey (n=905)

Of those who do send letters or parcels to Guernsey, 59% expect letters to be delivered 'next working day' or in 'two working days'. For parcel delivery, just 9% think next working day delivery to Guernsey is reasonable, with 68% expecting delivery between two working days and within a week.

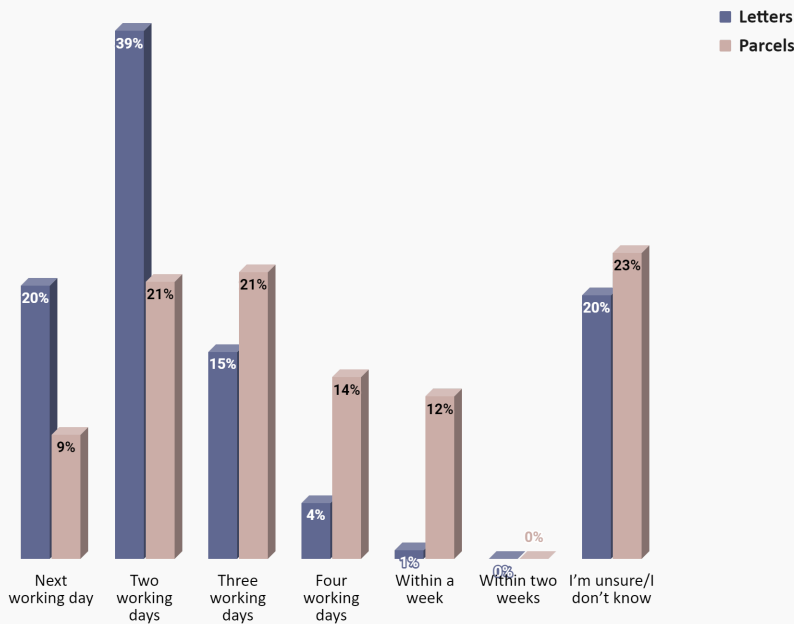


Fig.17 Speed expectations to Guernsey (n=142)

Q. When sending letters to Guernsey, what do you think is reasonable in terms of speed of delivery?/ Q. What about when sending parcels to Guernsey, what do you think is reasonable in terms of speed of delivery?

Over a third of respondents send letters to Europe through postal services in Jersey. With 36% of respondents selecting 'yes'.

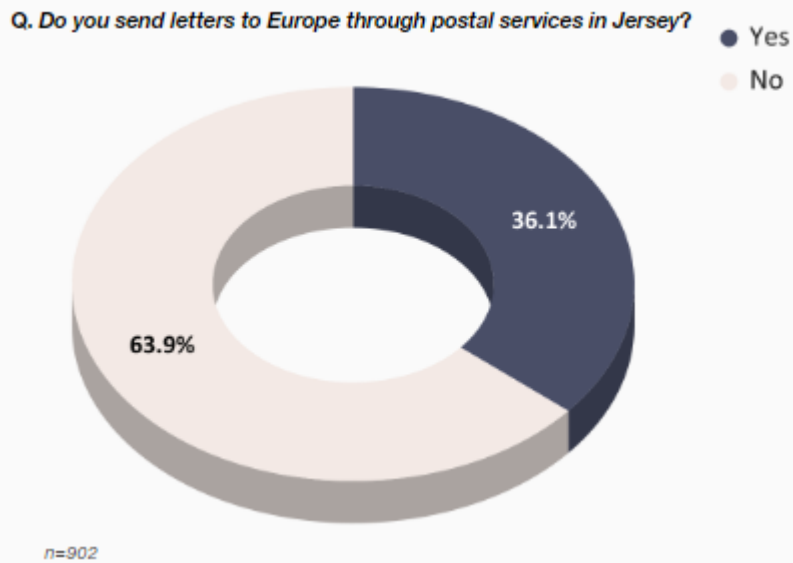


Fig.18 Sending to Europe (n=902)

Of those who do send letters to Europe, the majority expect delivery 'within a week'

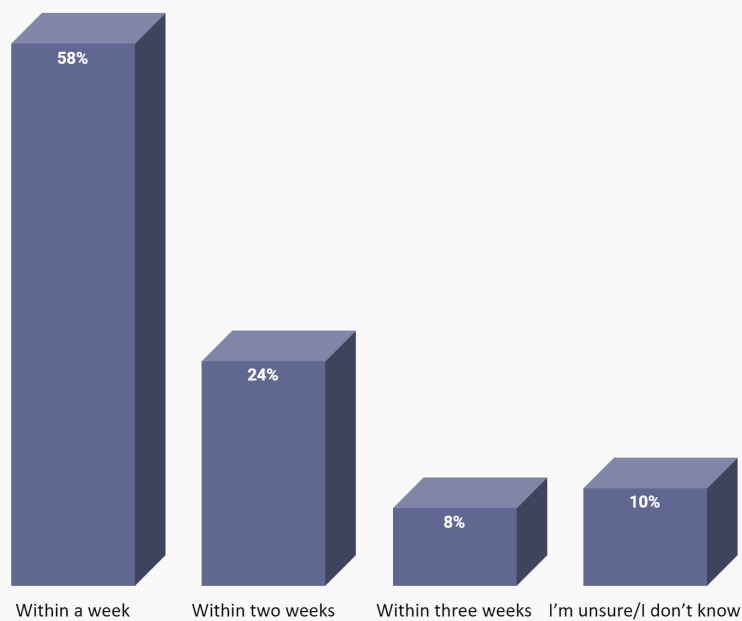


Fig.19 Speed expectations to Europe (n=377)

Q. When sending letters to Europe, what do you think is reasonable in terms of speed of delivery?

Just over a third of respondents send letters to the rest of the world, with 34% selecting 'yes'.

Q. Do you send letters to the Rest of the World through postal services in Jersey?

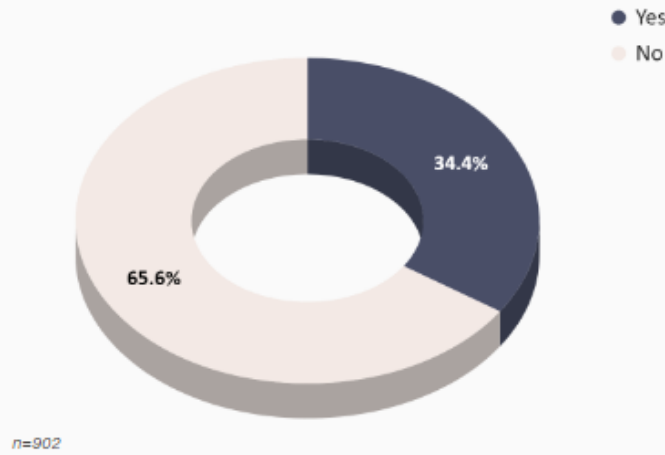


Fig.20 Sending to The Rest of the World (n=902)

There was a mixed response for 'reasonable' speed from those who do, the most common answer being 'within two weeks' which was selected by 41% of respondents.

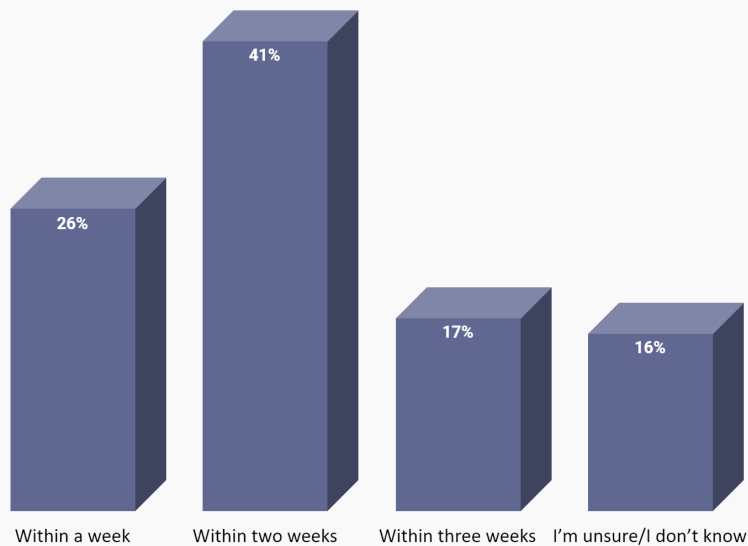


Fig.21 Speed expectations to The Rest of the World (n=367)

Q. When sending letters to The Rest of the World, what do you think is reasonable in terms of speed of delivery?

Market Share

For the following questions, respondents were asked to think about all the parcels they've received and sent in the last year and what percentage were delivered and sent with each different provider.

Most parcels were received from Jersey Post (69%), 16% were received from Evri (Hermes).

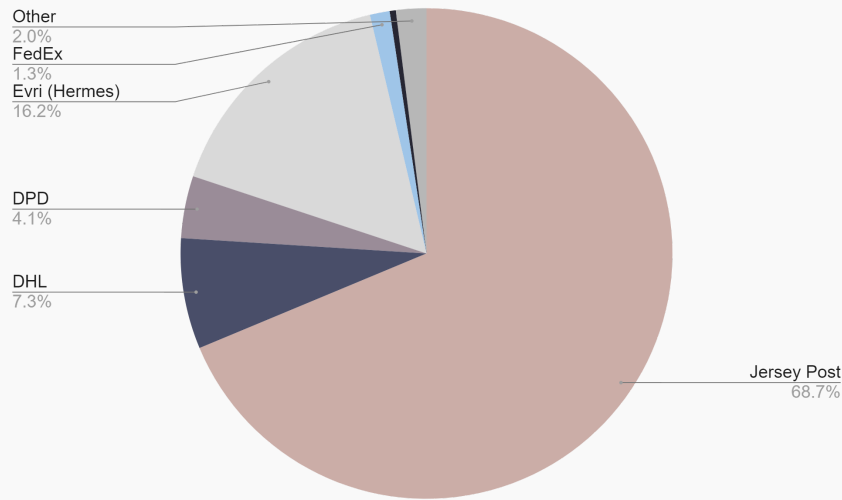


Fig.22 Inbound market share (n=737)

Q. When thinking about all the parcels you've received in the last year, roughly what percentage were delivered by each of the following?

For outbound parcels, 90% were sent via Jersey Post, the next most commonly selected was DHL and Evri (Hermes) with 3.8% and 3.6% respectively.

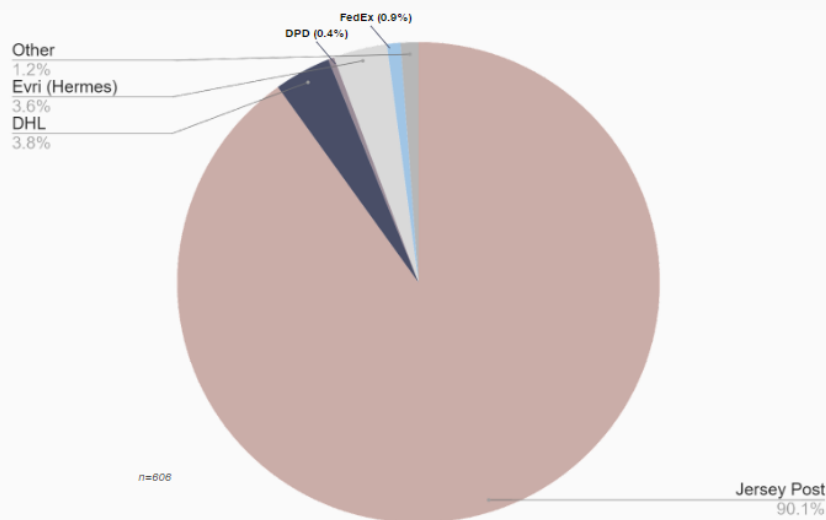


Fig.23 Outbound market share (n=606)

Q. If you've sent parcels in the last year (to any location), roughly what percentage were sent with each of the following?

Attitudes and Values

Letters

The following question asked respondents to rate experiences of postal services in Jersey, when sending or receiving letters to gain a better understanding of potential strengths and weaknesses in the market.

For letters, customer service was rated the highest at 7.72/10 (mean score). Lowest rated was cost at 5.73/10.

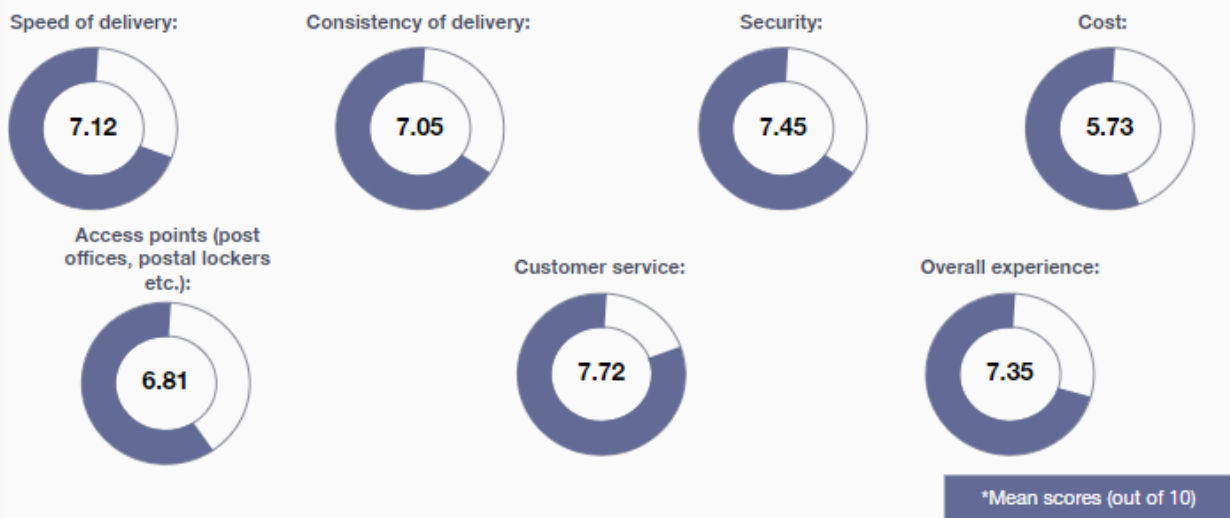


Fig.24 Letters rating (n=856)

Q. How would you rate your experience of postal services in Jersey when sending or receiving letters; (where 1 is very poor and 10 is excellent.)

Parcels

In order to further gauge perspectives on postal services in Jersey, respondents were asked to rate the following out of 10 in terms of how important they are, for both receiving and sending a parcel.

For inbound parcels, 'Reliability' was rated most important at 8.62/10. Reaffirming the importance of dependable and trustworthy delivery services and how this factor seems to be of more importance than 'speed' alone. 'Speed' and 'consistency of delivery' also scored highly

at 7.83/10. 'Accessibility' scored the lowest at 6.61/10, while still moderately important, it's not as high of a priority when it comes to receiving a parcel.

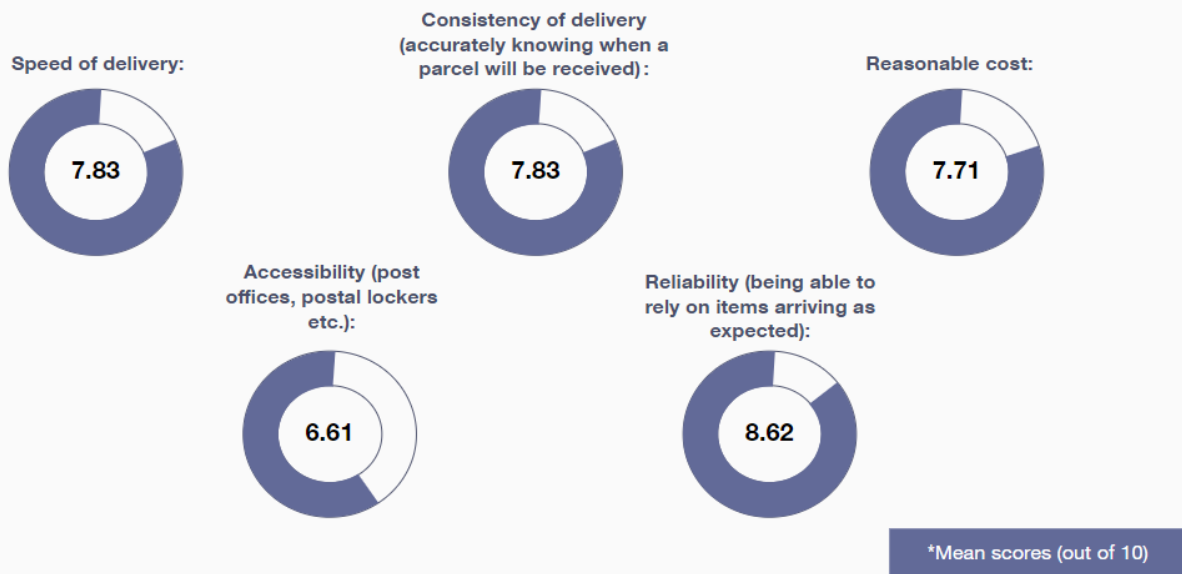


Fig.25 Importance when receiving (mean scores) (n=907)

Q. When thinking about receiving a parcel, how important are the following to you? (score out of 10 for importance, where 1 is not important at all and 10 is extremely important)

For outbound parcels, 'Reliability' was again found to be most important at 8.16/10, but 'Reasonable cost' was almost as important at 7.94/10. Although rated of higher importance when sending a parcel, 'accessibility' was still perceived as the least important of the factors provided at 6.69/10.

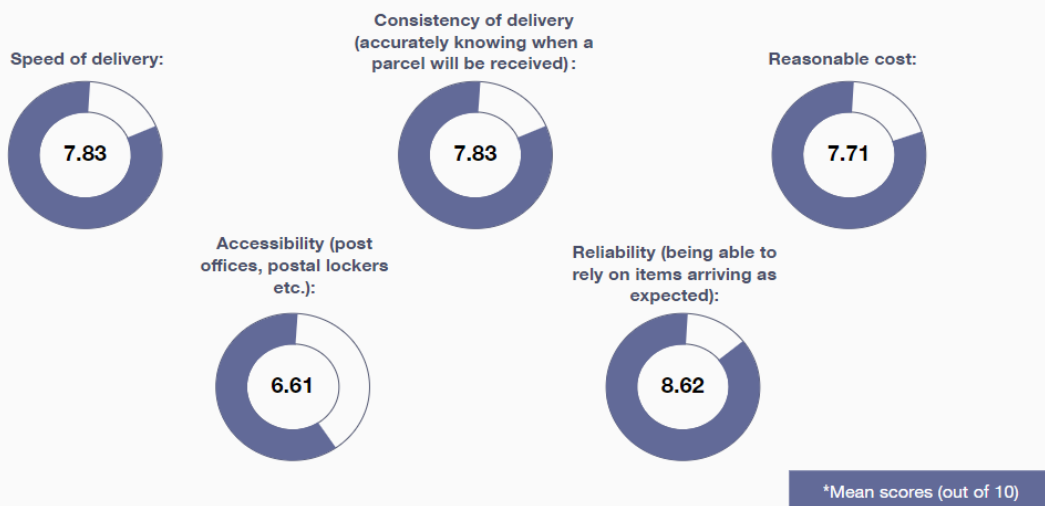


Fig.26 Importance when sending (mean scores) (n=907)

Q. When thinking about sending a parcel, how important are the following to you? (score out of 10 for importance, where 1 is not important at all and 10 is extremely important)

The next questions asked respondents to rate experiences of postal services in Jersey, but this time for parcels.

Comparatively to letters, lower scores for experience sending or receiving parcels overall, customer service again rated the highest at 7.36/10, this was found to be a consistent strength of postal services in Jersey. Cost was again rated lowest at 5.49/10.

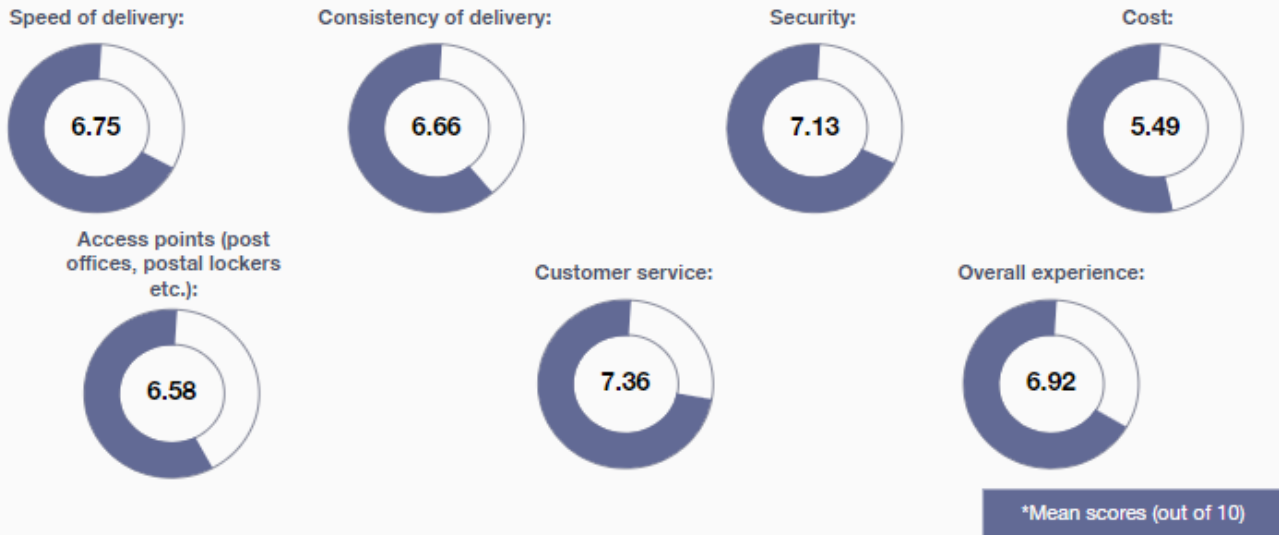


Fig.27 Parcels rating (n=831)

Q. How would you rate your experience of postal services in Jersey when sending or receiving parcels; (where 1 is very poor and 10 is excellent.)

Attitudinal Statements

The next question used a Likert scale with some attitudinal statements (both positive and negative) to identify key user needs from postal services in Jersey.

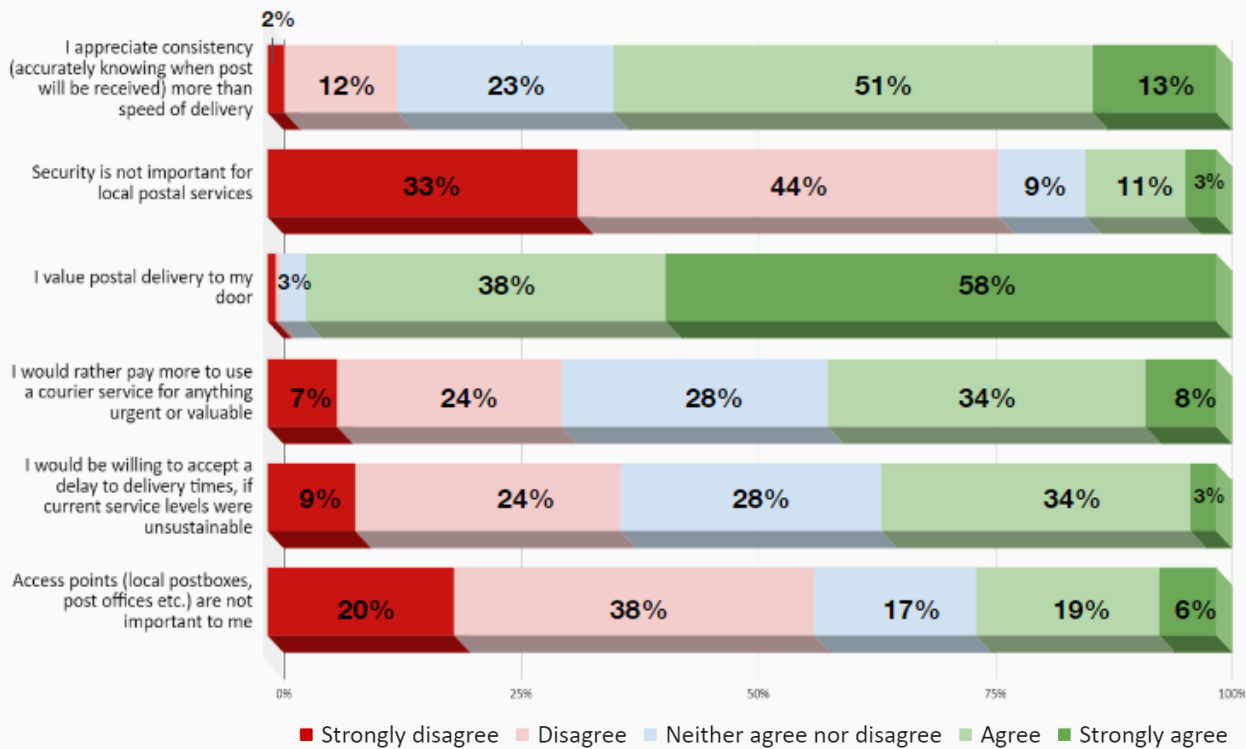


Fig.28 Attitudinal statements (n=872)

Q. When thinking about postal services in Jersey, do you agree or disagree with the following statements?

Responses clearly demonstrate the value of ‘postal delivery to the door’, with 96% agreeing or strongly agreeing with this statement. 64% of respondents agreed or strongly agreed that they ‘appreciate consistency more than speed of delivery’ echoing the importance placed on consistency found through qualitative research. Security is also important to respondents, as 77% disagreed or strongly disagreed that ‘security is not important’. Mixed responses to ‘I would be willing to accept a delay to delivery times if current service levels were unsustainable’, suggesting some respondents are open to accommodating delays if it’s necessary for a sustainable service.

Open-ended Responses

The final two questions of the survey were open-ended text boxes, giving respondents the opportunity to give their views on postal services in a more detailed manner. These questions received excellent engagement, with 756 and 729 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 ‘What is one thing you really value about postal services in Jersey?’:

SecureDrop
Speed
 Home deliveries
 Regular deliveries
Customer service
 Lockers
 Stamps
 self-service
Reliability
 Accessibility
 Reasonably priced
 Locally owned

Customer service x 334
 Reliability x 151
 Home deliveries x 76
 Accessibility x 64
 Speed x 63
 Regular deliveries x 60
 SecureDrop x 25

Fig. 29. Open-ended values (n=756)

Q.What is one thing you really value about postal services in Jersey?

Responses to this question showed how much customer service is valued, both at post offices and from postal delivery workers. Postal services were viewed as trustworthy and reliable and this aspect was highly valued. Regular home deliveries and the ability to use the SecureDrop service was also perceived as valuable in a number of responses.

There follows a selection of direct verbatim quotes which bring to life responses to the first open-ended question:



The second open-ended question asked respondents ‘What is one aspect of postal services in Jersey you couldn’t tolerate changing?’:



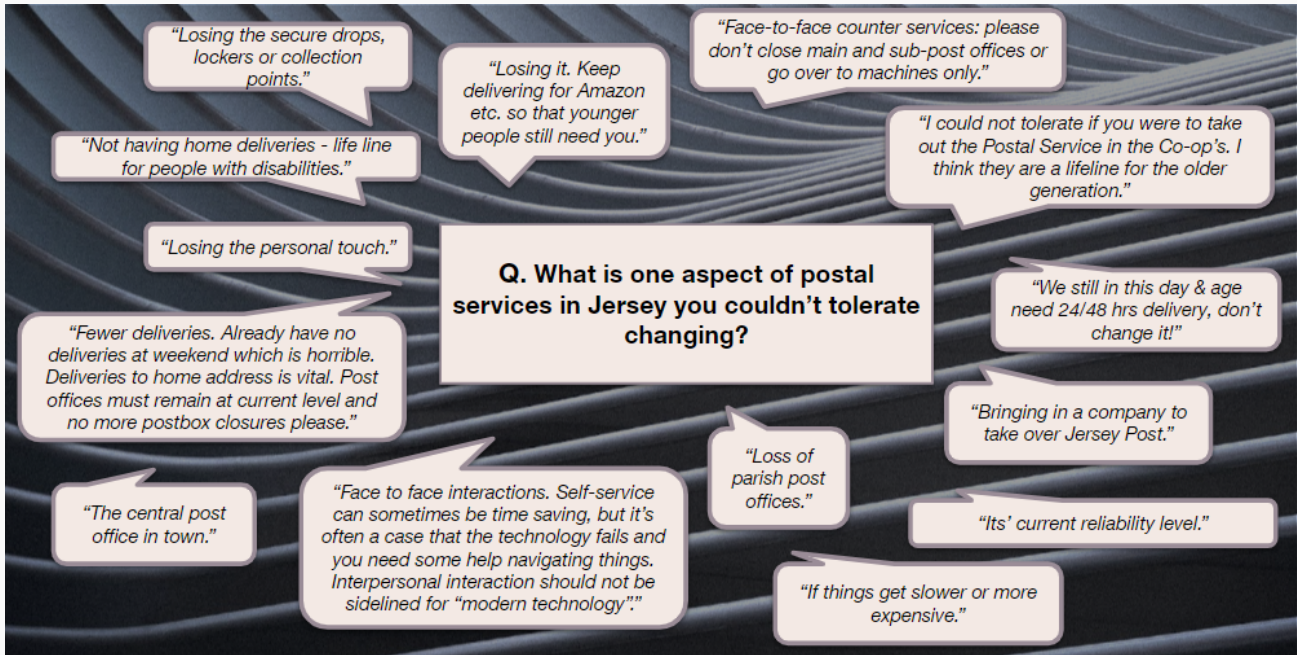
Home deliveries x 189
 Customer service x 121
 Regular deliveries x 114
 Accessibility x 107
 Prices increasing x 60
 Speed x 42
 SecureDrop x 34

Fig. 30. Open-ended tolerance to change (n=729)
 Q. What is one aspect of postal services in Jersey you couldn’t tolerate changing?

Responses to this question somewhat echoed the first, with respondents frequently expressing a lack of tolerance to the removal of postal delivery to their door. Maintaining the regular postal delivery was perceived as crucial to the customer experience. Echoing the qualitative research, clear intolerance in responses to a decrease in customer service levels. Many stated they wish for their regular postal delivery person to continue and for the staffing levels in post offices to remain high to ensure an efficient and satisfactory service.

Responses also indicated that customers would not tolerate a reduction in delivery days per week. They expect reliable and consistent delivery services throughout the week. There was some intolerance to the further closure of local post offices or post boxes, especially in more rural parishes such as St. Mary and St. Ouen. Delivery prices locally seen as somewhat reasonable, but further price increases would not be tolerated - particularly for delivery to the UK/other destinations.

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





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 users of postal services 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 (17+), gender, Parish, income, household size and employment sector. It was key to target a reasonably statistically representative sample of islanders to effectively understand the market.

The below charts show the %s per each socio-demographic segment.

Age:

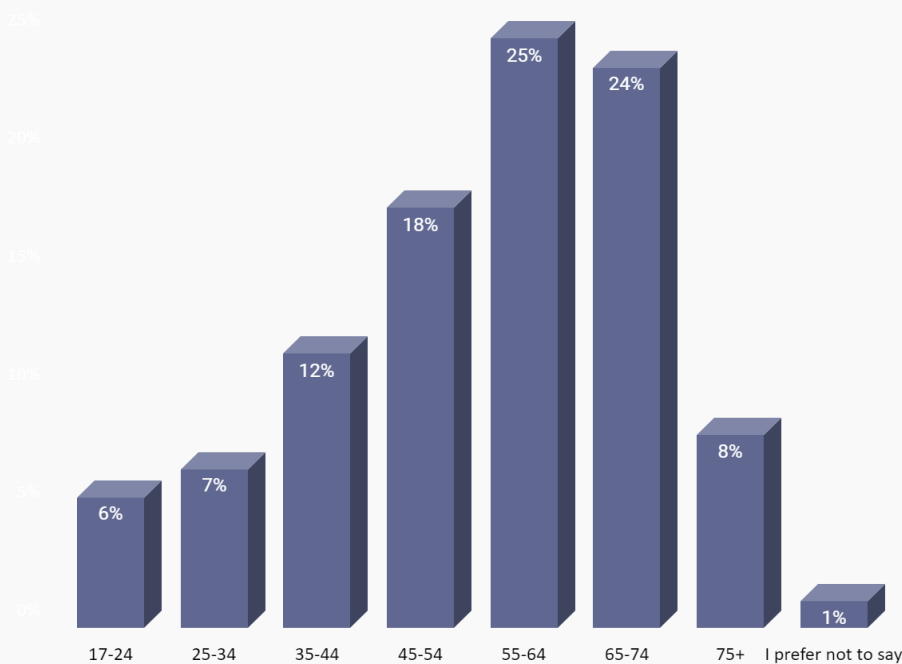


Fig. 31. Survey demographics - age [n=907]

Parish:

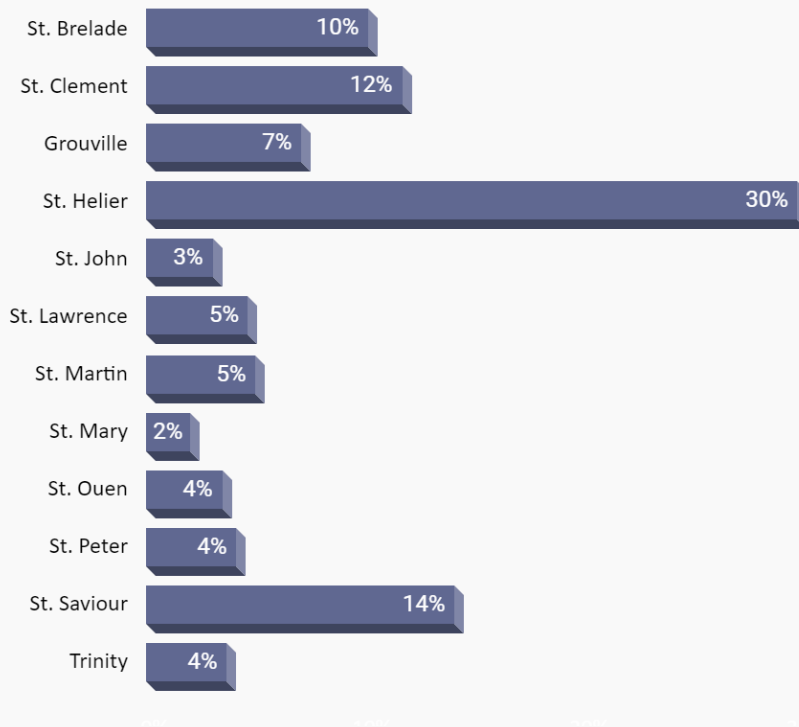


Fig. 32. Survey demographics - **parish** [n=906]

Employment:

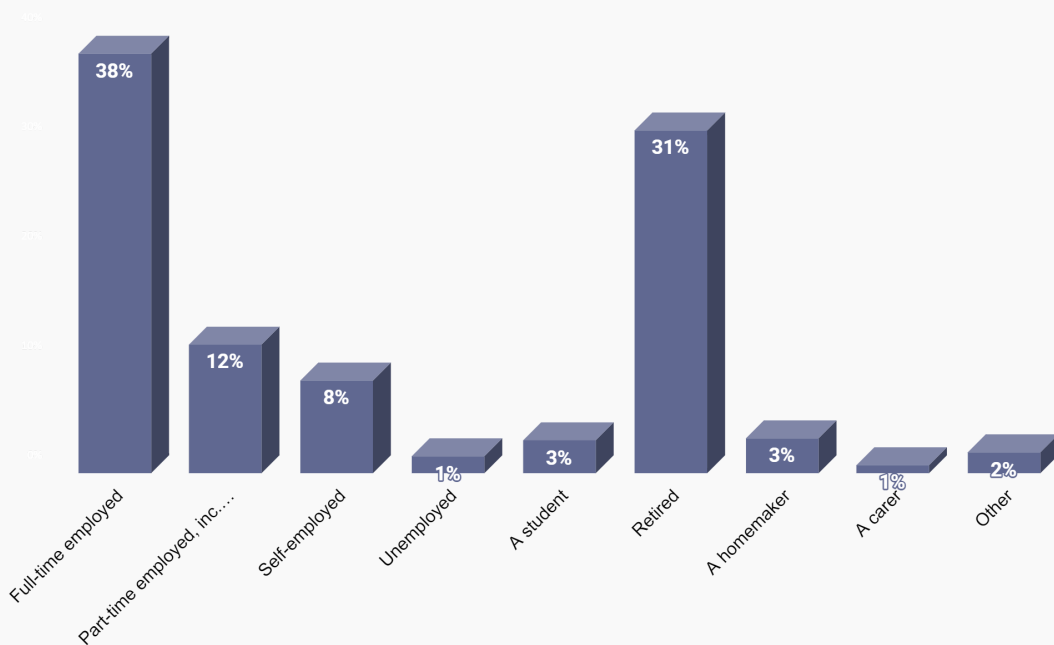


Fig. 33. Survey Demographics - **employment** [n=817]

Gender:

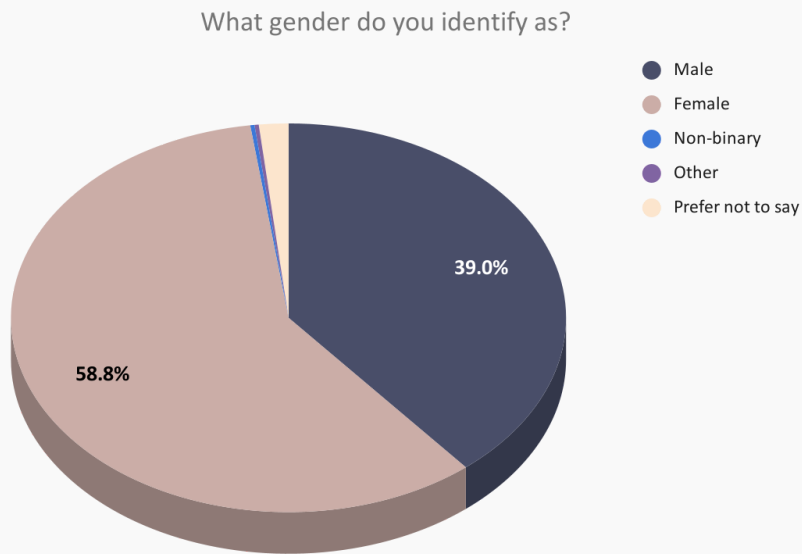


Fig. 34. Survey Demographics - **gender** [n=816] (prefer not to say 2%)

Household Size:

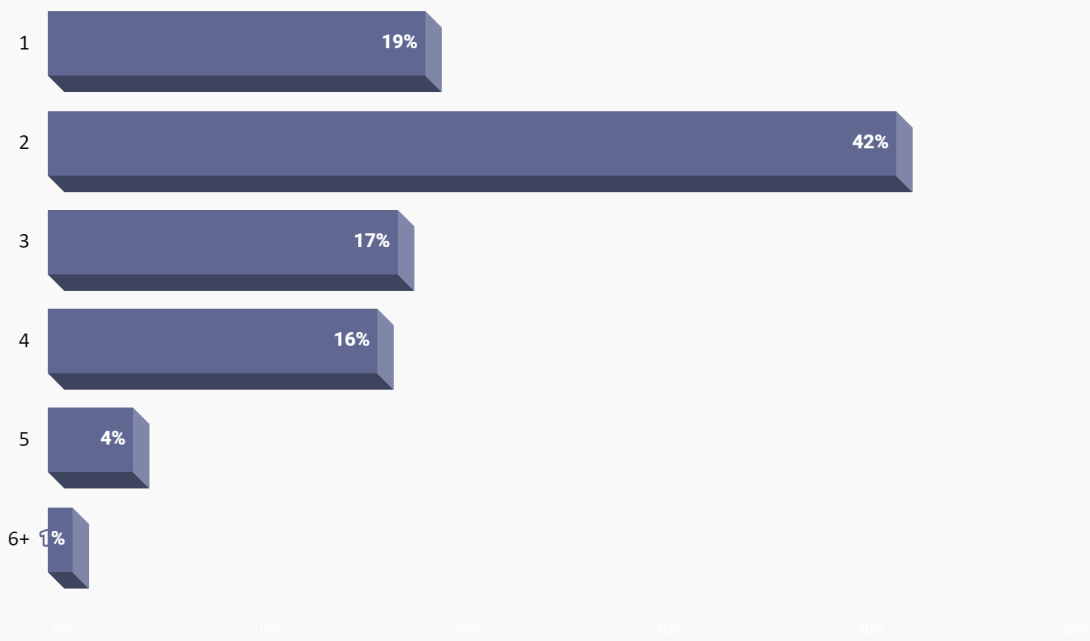


Fig. 35. Survey Demographics - **Household size** [n=801]

Total Household Income:

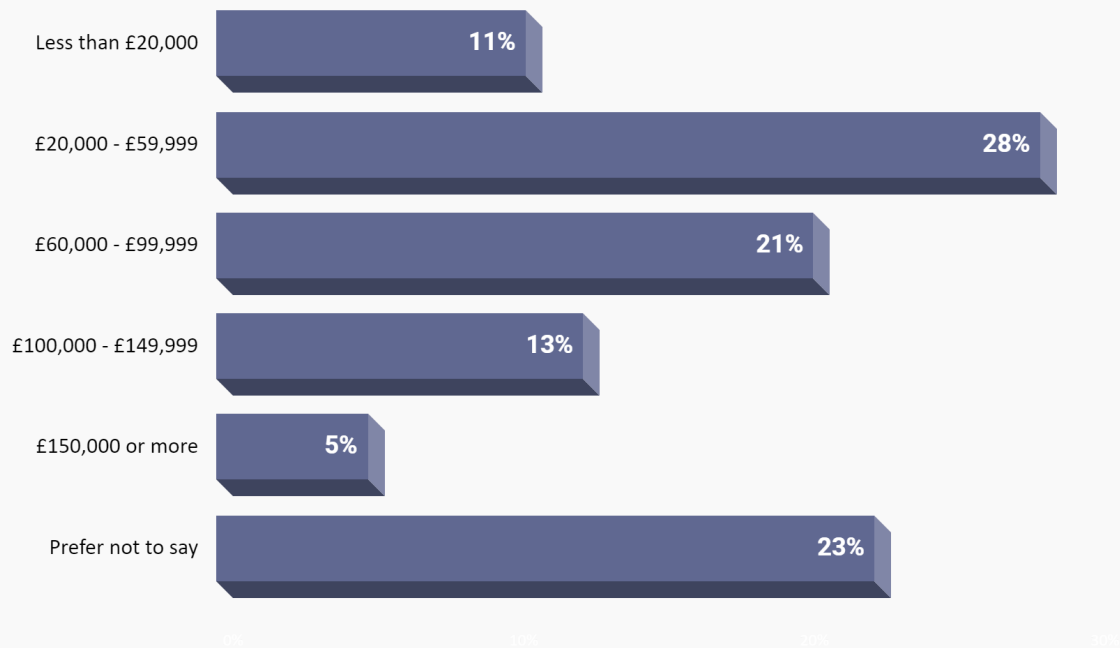


Fig. 36. Survey Demographics - **Household Income** [n=808]

Industry:

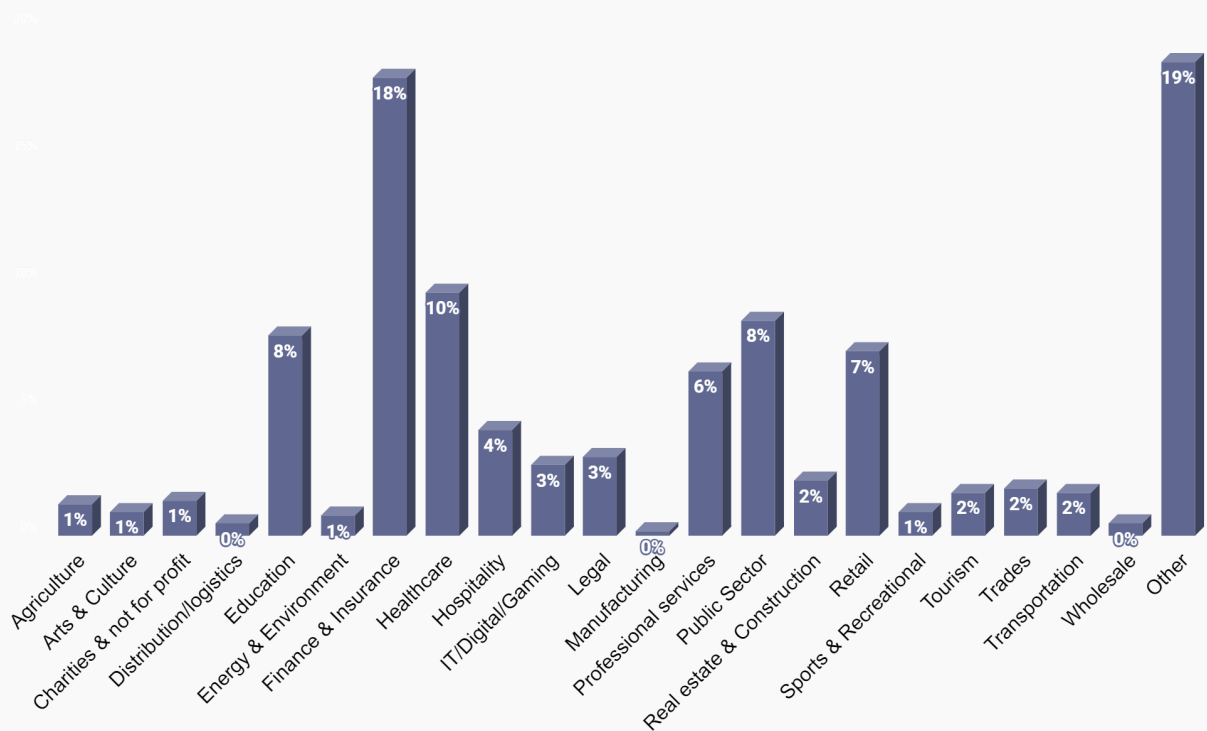


Fig. 37. Survey Demographics - **Industry** [n=649]

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