4insight

Residential Construction Sector Review

Research Report

Prepared for:
Jersey Competition Regulatory Authority
January 2025

Contents

Executive Summary

4insight is an independent, local research agency and was commissioned by the Jersey Competition Regulatory Authority (the Authority) to explore the experiences of local consumers with the Jersey residential construction sector.

Qualitative and quantitative research reveals predominantly negative sentiment towards the sector. Rated 2.9/5 for meeting the needs of Islanders, projects frequently face budget overruns and delays. Projects with higher budgets and those involving structural changes, planning permissions, building control or home extension are particularly susceptible. Sharp cost increases have been experienced across the board in recent years, affordability of work was rated 5.2/10 and 82% disagreed with the statement “I find household projects in Jersey affordable”.

Three primary ‘blockers’ contribute to inefficiencies:

1. Limited contractor availability: A high demand, low resourced market. Particularly in trades like roofing and scaffolding (almost half of those who had engaged with roofing contractors said there were not enough to choose from).

2. Recent contextual events: Covid-19 pandemic and the Ukraine War increased material costs and caused delays. Post Storm Ciarán the sector saw a spike in demand, particularly for certain trades. Paradoxically many construction businesses are perceived to be closing down.

3. Planning: Widely viewed as costly, inconsistent and inefficient, 81% agreed with “Planning processes in Jersey are a significant barrier to completing projects.”

Consumers report a lack of healthy competition, the range of options was rated 5.4/10 and 75% disagreed with “There is sufficient competition among contractors in Jersey to ensure fair pricing”. It's difficult to find quality, reliable contractors and there is a reliance on ‘word of mouth’ recommendations. It's particularly difficult for smaller projects and for consumers who are newer to the Island, compared to some business owners and landlords who have more established networks.

The supply chain is also viewed as inefficient, with high material and labour costs, limited availability and significant delays (58% had delays in their most recent project, 83% for projects with budgets over £100k). Most delays were caused by contractor availability issues and materials delays.

About the Research

The research aim was to explore the experiences of local consumers (including landlords/small businesses) with the Jersey residential construction sector.

Specific objectives included:

- identifying experiences by project type
- understanding if the sector has experienced a large cost variation to end customers
- exploring any potential blockers to delivering construction work
- identifying if there are any issues leading to competition concerns by different market segments
- understanding whether the supply chain functions well from a competition and consumer perspective

The project scope was Jersey islanders aged 17 years and older.

The research **sample** was recruited for both the focus groups and online survey through:

- 4insight's online panel of 5,400+islanders (reasonably representative for Jersey)
- 4insight's social and traditional media promotion including 'paid boosts'

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, a mix of renters/homeowners, project type, budgets etc.

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

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.

Qualitative:

Conducting focus groups ensured that we obtained the level of depth and understanding needed from both the rational and emotional perspectives of consumers.

4insight organised and hosted 4 focus groups, generating a sample of **29**:

- **2x** focus groups with renters/homeowners
- **2x** focus groups with landlords/small business owners

Each focus group lasted about 90 minutes and was conducted using a discussion/topic guide which was agreed upon prior to use.

Projective and enabling techniques within the focus group methodology were utilised to explore perceptions at an individual and emotional level, also opening up discussions at a deeper level.

The focus groups were professionally facilitated/moderated by a senior member of 4insight, with initial scene setting and Neuro-Linguistic Programming (NLP) we eliminated any potential 'group think,' framed the discussion and elicited perceptions and forward ideas in their representative style.

All focus groups were held at 4insight's professional viewing facilities with one-way mirrors to allow key team members to listen/observe live, avoid risking biasing responses by being present and allow extra questions to be asked before the groups closed.

All groups were digitally recorded and independently analysed by 4insight.

Quantitative:

The follow-on online survey was semi-structured, with a mix of closed questions, semi-structured questions and one open-ended question. The focus group findings informed the design of the quantitative survey.

4insight designed the survey questions in a Word document for review and sign-off. We had some review sessions and once we agreed on a final version this was programmed into our professional survey software. We sent the survey 'preview' link to the Authority for review and sign-off as well. The first question was an age question, as under-17-year-olds needed parental permission and were screened out. All the other socio-demographic questions were left until near the end of the survey.

The online survey was designed for completion on mobile but optimised for PC and tablet as well. After thorough testing it took about 15 minutes to complete.

4insight used best engagement practices with our in-house professional online survey technology, which also allowed for cross-tabulations by various questions to be conducted, enabling comparisons across different groups/segments e.g. renters vs. homeowners, business owners/landlords, project types, household income etc.

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 with a small group first to triple-check that everything was working correctly. 4insight reviewed and quality-checked the resulting data to confirm this prior to a full launch.

The survey went live to 4insight’s online panel on the 22nd November and was closed 16th December 2024. After data cleaning, the final number of responses was **301**, of those, **264** were from respondents who had work done on their property/properties as a customer in the past 3 years.

Full analysis and cross-tabulations were completed by our team at 4insight.

Qualitative Research

First Words/Associations

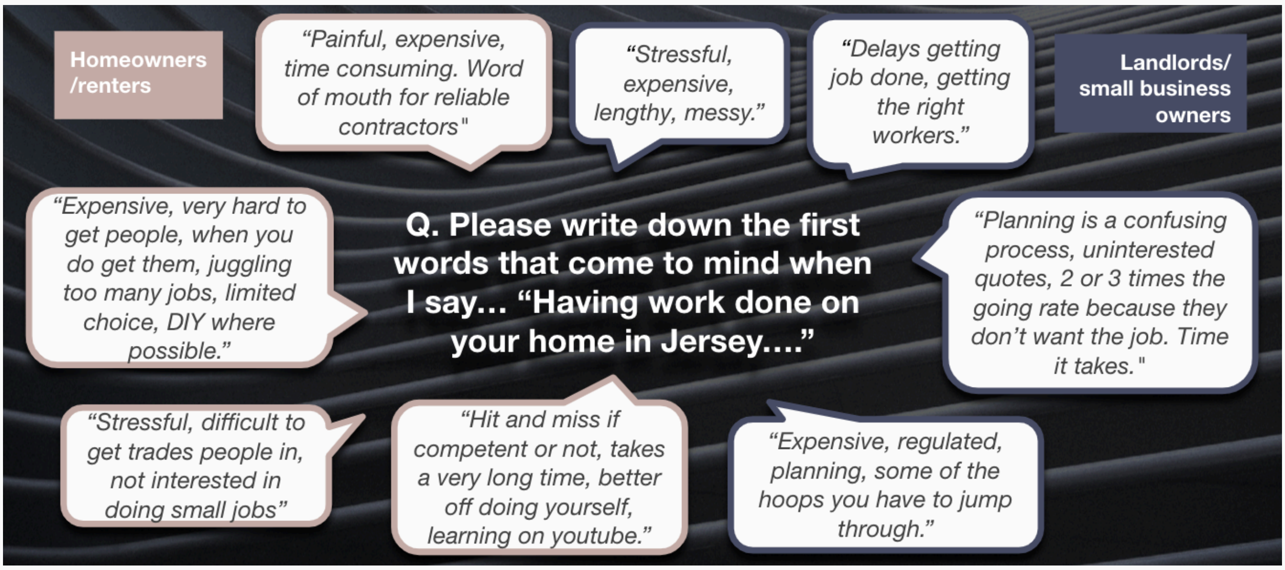
In order to gauge initial perceptions and sentiment, participants were asked to write down the first words or associations that come to mind when they heard the words “Having work done on your home in Jersey….”.

When these responses were coded and analysed, there was an overriding negative sentiment with 83% negative, 10% neutral and 7.5% positive. Costs came through strongly in this exercise, with ‘Expensive/High Costs’ most mentioned by 24/29 participants. The resulting word cloud:

Fig. 1. First words/associations -“Having work done on your home in Jersey….”.

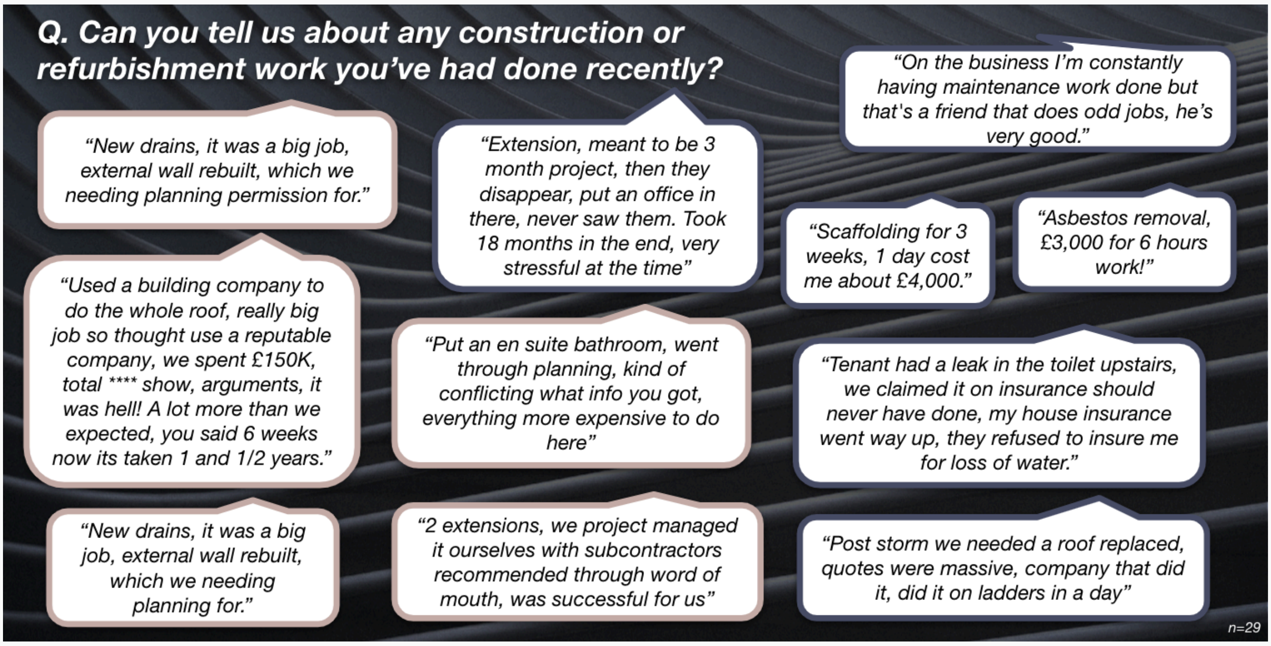
Q. Please write down the first words/associations that come to mind when I say… “Having work done on your home in Jersey….”

Other common responses included ‘hard to find contractors’ (x19), ‘stressful’ (x13), ‘planning/regulations’ (x9), ‘delays’ (x8) and ‘trust’ (x7). Indicating the initial prevailing negativity and frustrations. Written responses were fairly similar between homeowners/renters and landlords/small business owners as seen from the verbatim quotes below. These themes were built upon and explored further in the subsequent discussions.



Works Carried Out

Participants described a wide range of construction and refurbishment works, ranging from routine maintenance to projects of significant scale. New kitchens and bathrooms were among the most common. Some participants talked about regular maintenance, such as fixing leaks, new flooring and drainage issues. Other larger projects included home extensions, roof replacements, and repairs to damage caused by Storm Ciarán.



Initial Discussions and Experiences

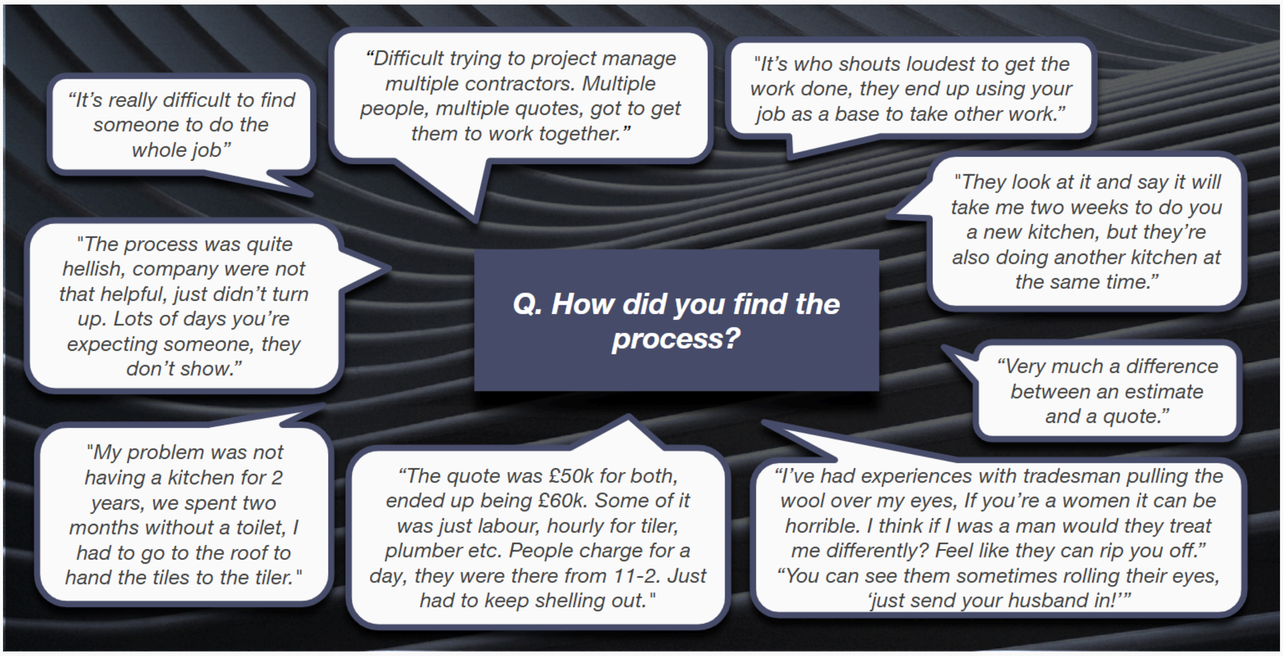
There was a mixed approach to contractor use, with some using one 'main contractor' for the whole project and others using multiple different contractors. For homeowners/renters 7/16 used one main contractor and 9/16 used multiple. This was similar for landlords/small business owners where 5/13 used one contractor and 8/13 used multiple. This tended to be dependent on the project type, with more extensive projects requiring multiple contractors. Some noted they found it difficult to find one main contractor to carry out the entire project.

Those who used multiple contractors had difficulties coordinating between different trades e.g. electricians, plumbers and plasterers for the same project. Some had experiences with failures to show up on time, causing significant delays with projects stretching from days, to weeks, to months. Delays were compounded by contractors juggling multiple jobs simultaneously, with a perception that it can become 'who shouts the loudest' to get work done.

Costs for projects frequently exceeded initial quotes, leaving some participants feeling 'ripped-off' and frustrated by inefficiencies. Most were happy with the quality of the work once completed, however other aspects of the process along the way diminished the overall experience.

There were some mentions, from female and male participants of experiences of bias against women during projects. These experiences tended to centre around feeling ignored, 'ripped-off' or the main communications around the project being directed towards a male/partner/husband. Some examples of this can be seen in the verbatim quotes below.

Finding reliable contractors was perceived as difficult, with a heavy reliance on recommendations or word of mouth. This makes it especially difficult for those carrying out their first projects, or those who are newer to the Island. Because of this, some try to do as much of the work as they can themselves. There were positive experiences with contractors, these tended to be more common among landlords or business owners who had established networks or had identified one contractor who they trusted to carry out works. During the group sessions, there were multiple instances where other participants asked for the contact information of those contractors.



Scoring Exercise

Participants were asked to write down scores from 1-10 for their most recent residential construction project, across four key categories; budget adherence, quality of the work, timeliness and communication.

	Homeowners/renters:	Landlords/small business owners:	Overall
Budget adherence	6.4	6.5	6.4
Quality of work	7.7	7.5	7.6
Timeliness	5.4	5	5.2
Communication	5.7	6	5.8

*Mean scores

Fig. 2. Scoring exercise - Most recent residential construction project

Q. Thinking about your most recent residential construction project in Jersey, please score the project on the following (on a scale of 1-10 with 1 being extremely dissatisfied and 10 being extremely satisfied)

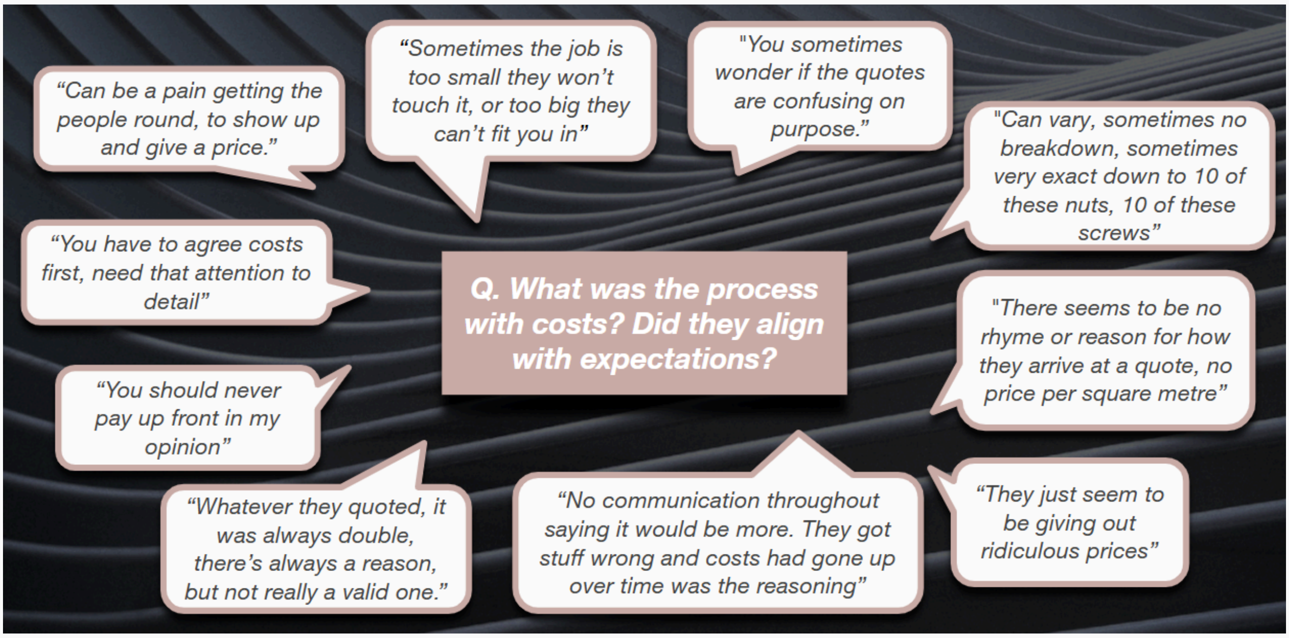
Quality of the work emerged as a key strength (7.6 overall), with timeliness being a key weakness (5.2 overall). Scores were fairly similar between homeowners/renters and landlords/small business owners. Landlords/small business owners scored budget adherence and communication higher on average. Homeowners/renters scored quality of work and timeliness higher on average.

Quotes, Costs and Budgets

Participants reported challenges in obtaining multiple initial quotes, with perceptions that it's hard to engage contractors, particularly for small to medium sized projects. When participants had received multiple quotes, costs could vary significantly. This inconsistency made it harder for them to make an informed decision.

Some quotes lacked transparency, without clear breakdowns, leaving clients unaware of potential hidden, unexpected costs. Some felt quotes were intentionally confusing, or so high that it seemed the contractors didn't actually want the work, this was particularly true for insurance projects. Lack of communication around extra costs or cost changes was a recurring issue. With examples of assumptions about clients ability to cover extra expenses, disputes over supplemental work or issues arising from errors during the work.

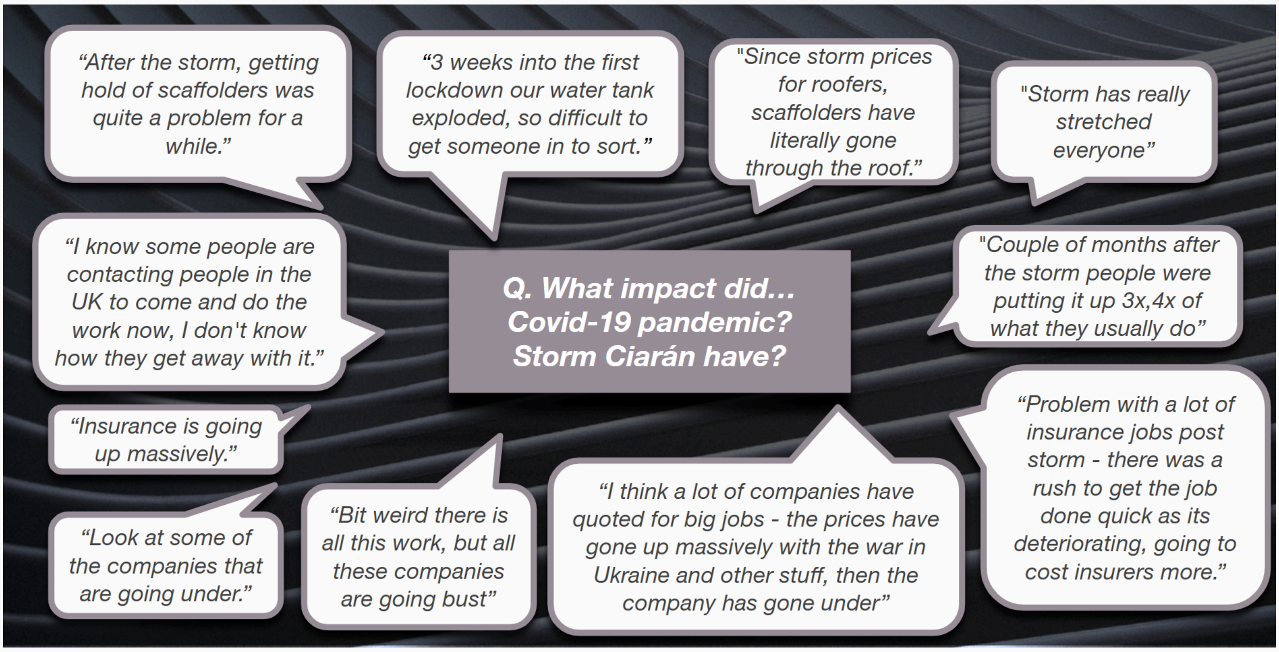
Overall, there was a strong perception that the cost of construction in Jersey had risen sharply across the board in recent years. Prices for roofing and scaffolding in particular were seen to have 'skyrocketed' post-Storm Ciarán, with quotes ranging dramatically. While some participants managed to negotiate favorable terms or stay within their initial budget, many felt misled or overcharged.



Impact of Contextual Events

Contextual events were perceived to have significantly affected residential construction in Jersey over recent years. The Covid-19 pandemic was thought to have disrupted supply chains and contractor availability; logistical challenges contributed to a 'backlog' of delayed projects. This was compounded by an increase in the demand for home improvement projects, as Islanders were more focused on enhancing their living spaces with extended periods at home. The War in Ukraine was seen to have driven up material prices, which placed additional strain on budgets and contributed to frequent cost overruns.

Participants also noted a significant increase in demand post-Storm Ciarán, with many struggling to find contractors, particularly in scaffolding, roofing and for essential repairs. Some reported cost increases of 2/3x for certain types of work. Despite the surge in demand, some mentioned instances of noticing construction businesses closing or going bankrupt, highlighting potential inefficiencies. Labour shortages and high costs also led to some bringing in contractors from the UK, though there was confusion around the legality of this. Informal practices, like cash payments to secure contractors were also mentioned and thought to be common. Along with noted sharp increases in insurance premiums, contextual events have contributed to a challenging environment.

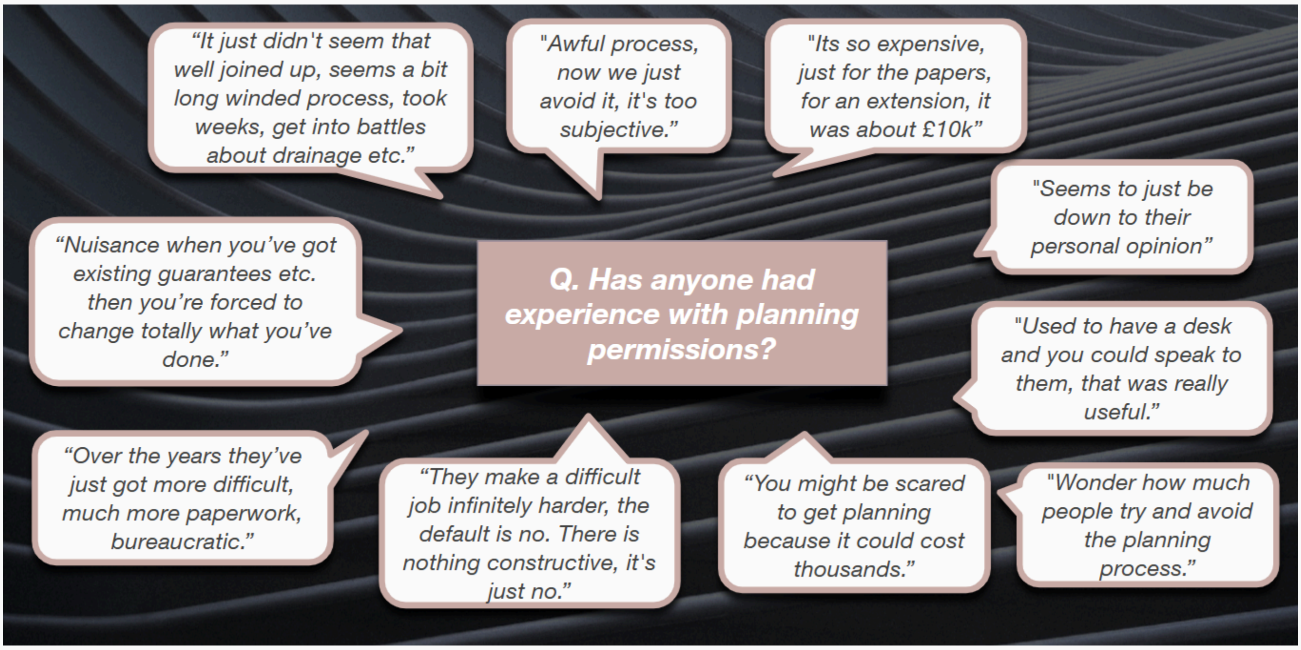


Planning

The planning process was perceived negatively across all the focus groups. Those who had experiences applying in the past described it as 'frustrating', 'bureaucratic' and 'inefficient'. The process was viewed as long-winded and lacking coordination, with paperwork causing significant delays that extended project timelines. A common frustration was decisions appearing to be subjective and inconsistent, with experiences of the default response being a 'no' without adequate justification as to why the decision was a 'no'. This left some applicants unclear on how to address issues.

There was also some criticism of strict demands for adherence to guidelines, which were often viewed as impractical or counterproductive. With examples like requirements to retain old structures or materials, which some felt led to further issues down the line. The significant costs involved with the process and enforced changes were also mentioned. Participants spent a lot of time and money on approvals, even for small projects.

The process caused negative interactions with neighbors or the community for some, which had caused considerable stress. Previous negative experiences have led to some not undertaking work or avoiding the process entirely.



Competition

Participants discussed the difficulties in finding quality contractors, with particular gaps in roofing and scaffolding. There was also thought to be a limited number of young islanders entering construction, raising concerns about long-term sustainability. Extremely high demand has allowed contractors to set extremely high rates, with pricing inconsistencies viewed as common. Participants also noted a lack of smaller companies and availability for smaller projects. Leading to a lot of participants carrying out work themselves, by learning skills online or enlisting the help of friends.

The high demand compounds delays, with stories of contractors taking on too many jobs simultaneously, leaving existing jobs unfinished for extended periods. Concerns were also expressed by some around a lack of regulation in pricing and accountability, with some contractors thought to be engaging in negative practices, customers feel they have little recourse. There is an over-reliance on relationships and word of mouth to find quality, reliable contractors, perceived to depend more on personal networks, “once you find someone good you keep hold of them”. This makes it difficult for people who are newer to the Island, or haven’t established a network for projects. There were calls for a resource to help people find and rate quality tradespeople e.g. Trustatrader. A rating system was seen as a great way to increase accountability. Overall there was a perceived lack of healthy competition in the sector, which is thought to be driving inflated prices, compounding delays and leading to inconsistent service quality.

Supply Chain

Significant challenges in the supply chain, with frequent material delays for projects. Some participants told stories of items taking months that were scheduled to arrive in days, disrupting project timelines. Perceptions that suppliers overcommit and fail to deliver on time, with instances of overbooking and waiting for pallets to be filled before shipping items.

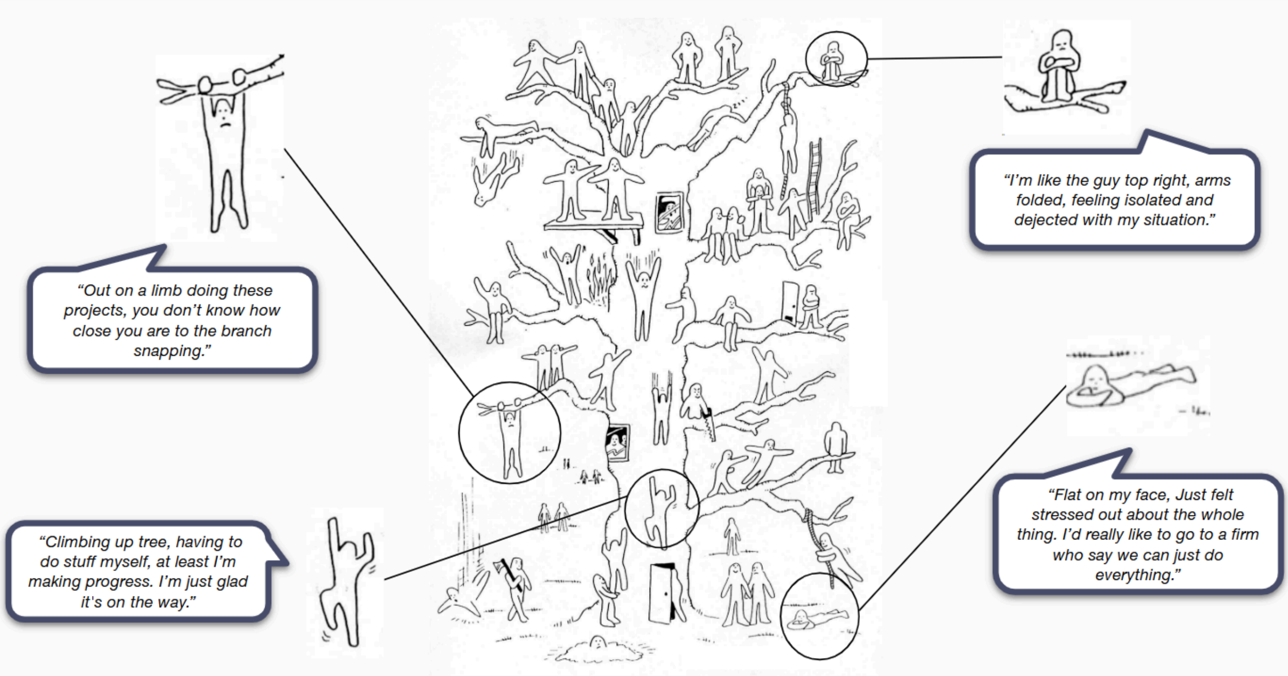
There was some frustration around the limited options in Jersey and low stock levels. Many acknowledged that this was the nature of being a small Island, with limited warehouse capacity. However this made some feel like they had limited choice and a reliance on more expensive materials. Contractors frequently cited "waiting for materials to arrive" as the reason for delays, with participants viewing this as the most common justification for slow progress on projects.

Contextual events, such as Covid-19, the War in Ukraine and Storm Ciarán have also caused increases in the prices of materials, with heightened demand as well as rising freight charges. The effects of these events are still perceived to be lingering and disrupting the supply chain.

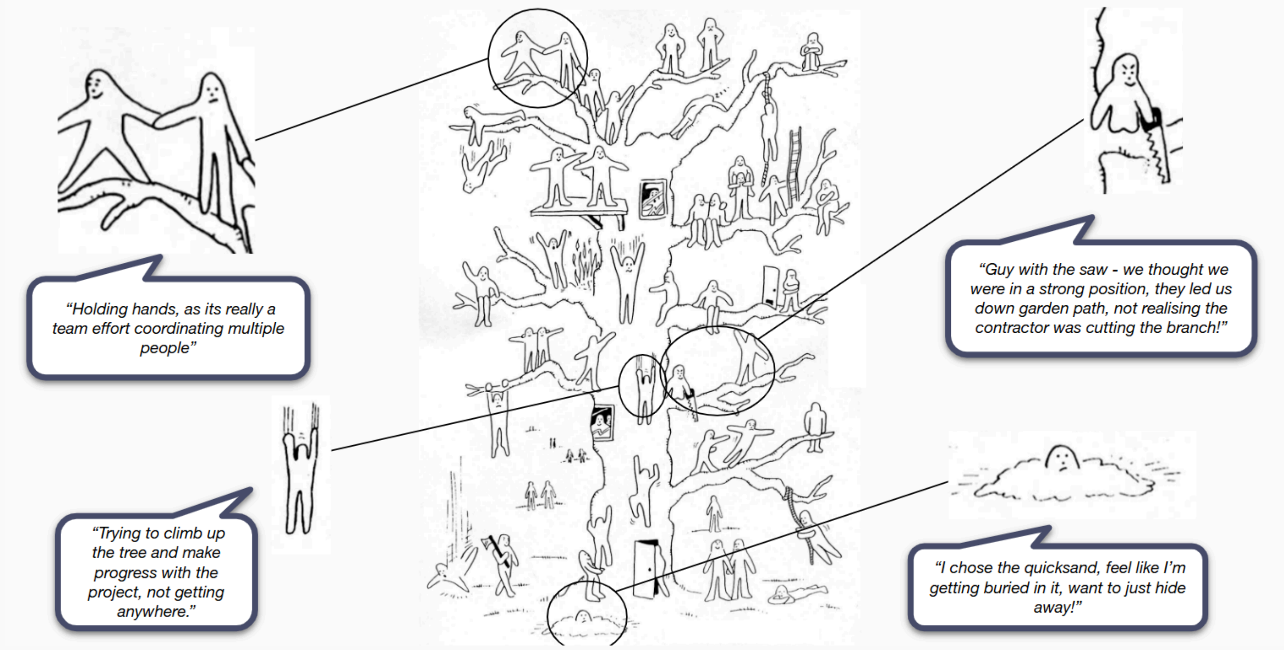
Projective Technique

The 'Blob Tree' projective exercise was then utilised to explore participants' emotions at a deeper level. This technique presents a tree populated with various 'blobs', each representing different emotional states. Participants were asked to identify the 'blob' that resonates most with their current feelings towards their recent works or planned projects and explain why they chose it. This exercise allows participants to express things that might be difficult to articulate verbally in a group setting.

The exercise revealed the negative emotional aspects of construction projects among homeowners/renters:



There was slightly more mixed sentiment among landlords/small business owners, however emotions were still mostly negative towards their projects:



Sentence Completion

Individual sentence completion exercises were conducted near the close of each focus group to capture participants key takeaways after expressing their own views and reflecting upon the discussions. These written responses were coded and analysed to gauge the most common responses.

The first sentence completion exercise asked participants to complete the following sentence ***"The biggest challenge in the residential construction market in Jersey is ………"***

Reflecting the discussions, 'Availability of quality contractors' was the most commonly mentioned challenge, followed by 'High costs':

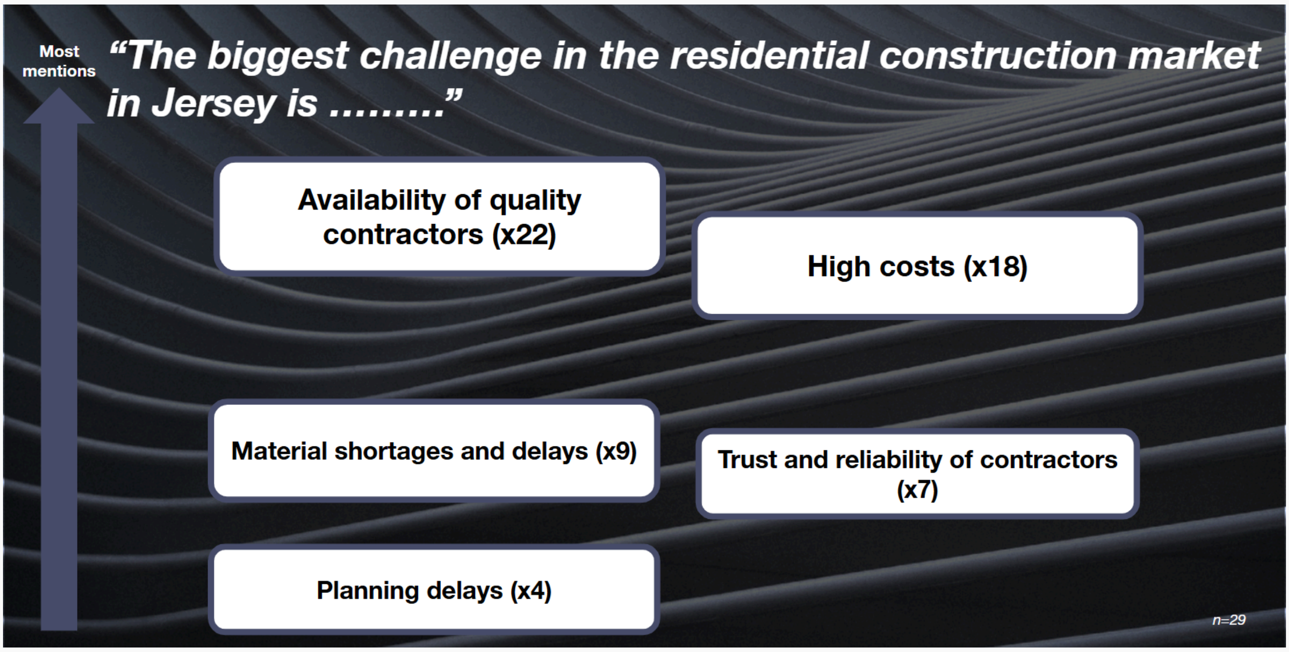


Fig.3 Sentence Completion 1

Q. Please complete the following sentence: “The biggest challenge in the residential construction market in Jersey is .....”

Some examples of responses to the first sentence completion exercise:

The second sentence completion exercise asked participants to complete the following sentence ***“If I could change one thing about residential construction in Jersey it would be.........”***

Similarly, making it ‘More affordable’ was most the most mentioned change, followed by the ‘Availability of quality contractors’:

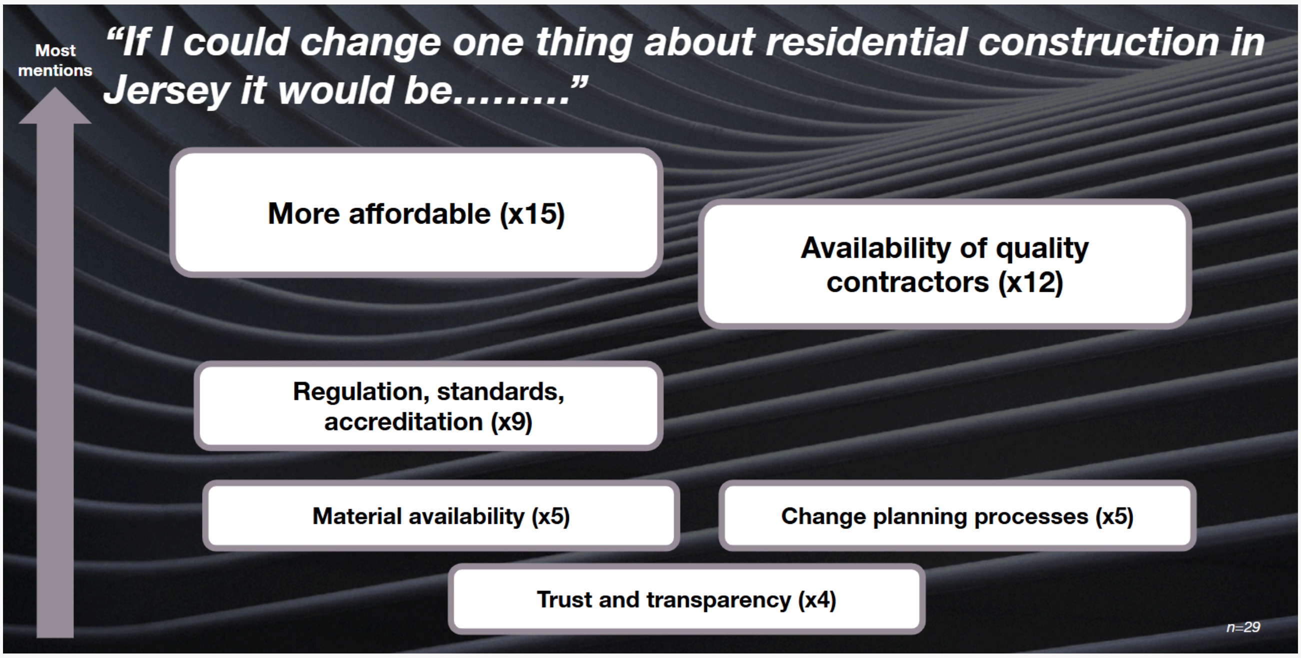


Fig.4 Sentence Completion 2

Q. Please complete the following sentence: "If I could change one thing about residential construction in Jersey it would be….."

Some examples of responses to the second sentence completion exercise:

Quantitative Research

Projects

Home refurbishment (e.g. new bathroom, new kitchen, new roofing), followed by maintenance were the most common projects undertaken by survey respondents. 41% had carried out essential repairs (e.g. post Storm Ciarán) and 21% of the sample had applied for planning permission.

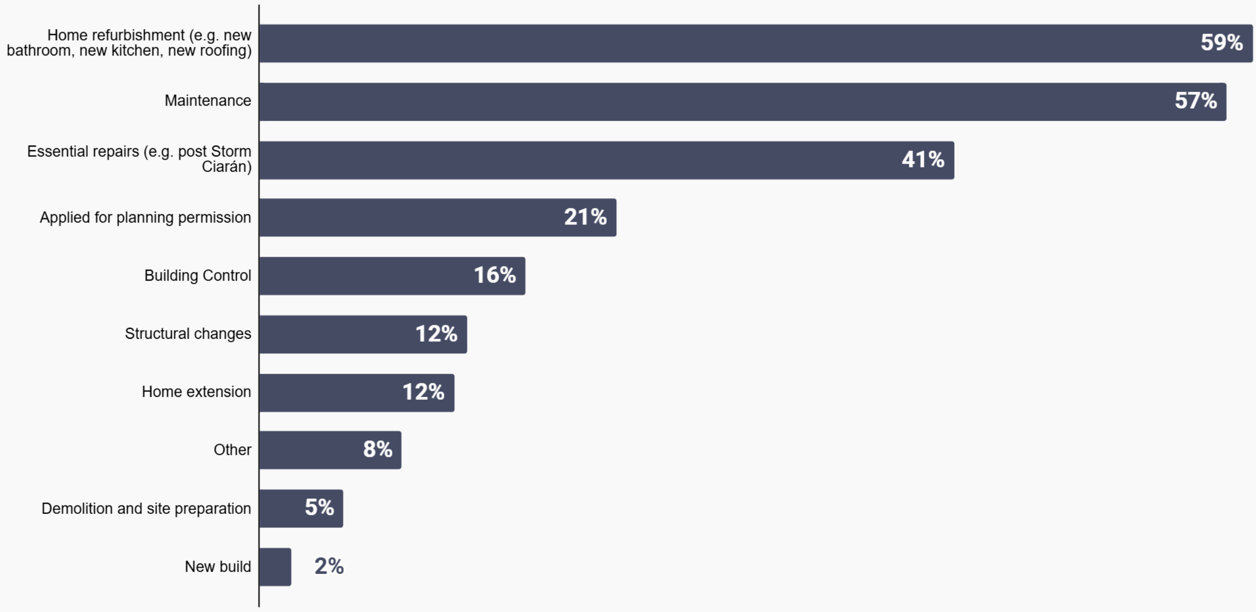


Fig.5 Projects undertaken (n=260)

Q Have you undertaken any of the following projects? (Please select all that apply)

In terms of types of contractor, plumbing was the most frequently engaged when undertaking works, closely followed by electrical installation and painter/decorators.

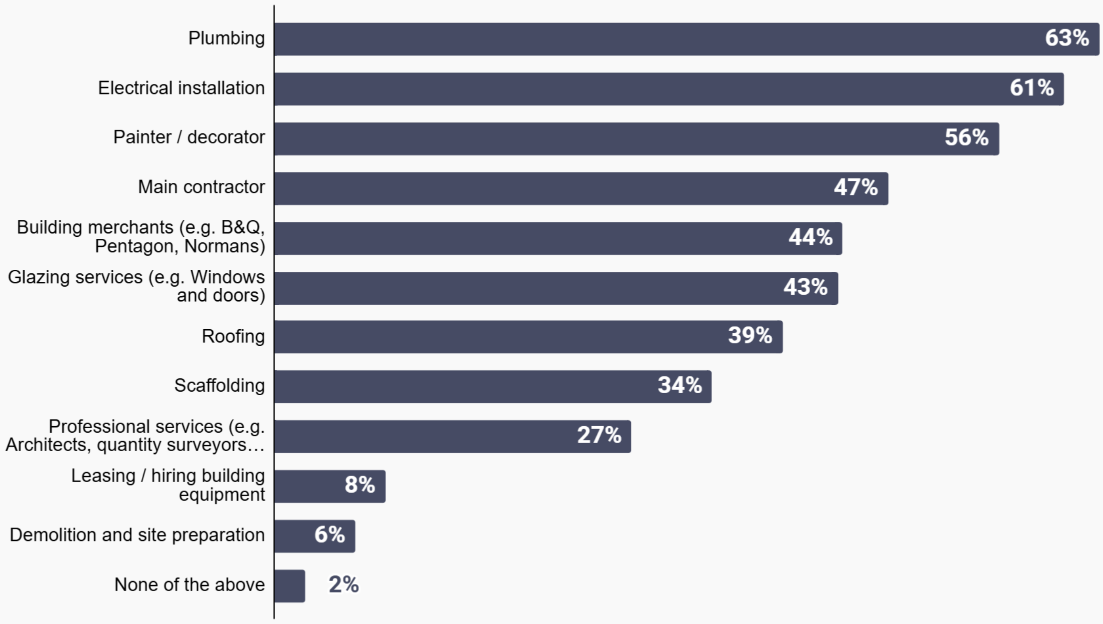


Fig.6 Contractors engaged with (n=259)

Q. Have you engaged with any of the following when undertaking works to your property/properties? (Please select all that apply)

There was a fairly even split between those using multiple contractors or one contractor for their most recent project, with slightly more using 'Multiple on Island contractors'. 2% of respondents used an 'Off Island contractor'.

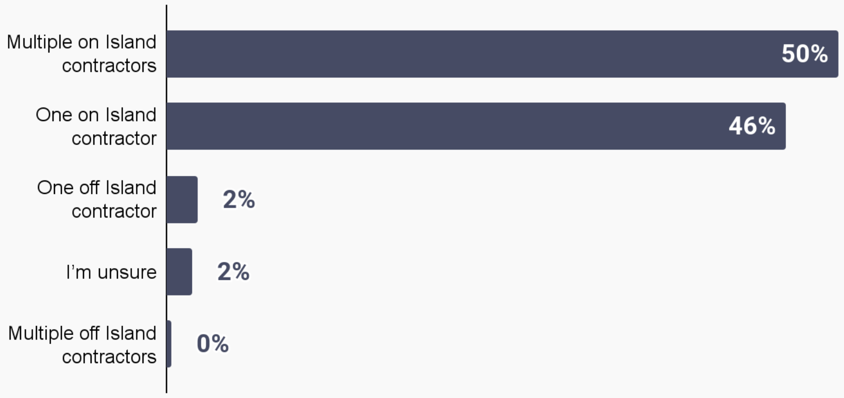


Fig.7 Multiple v. One Contractor (n=260)
Q. For your most recent project, did you use?

Landlords were more likely to have used 'Multiple on Island contractors' at 57%.

When looking at cross-tabulations run by the most frequent projects undertaken, respondents were more likely to use multiple contractors for Building Control (63%), Structural Changes (59%), Home Refurbishments (58%), Home Extensions (57%) and Applying for Planning Permission (55%). Those with Maintenance projects were more likely to use one contractor.

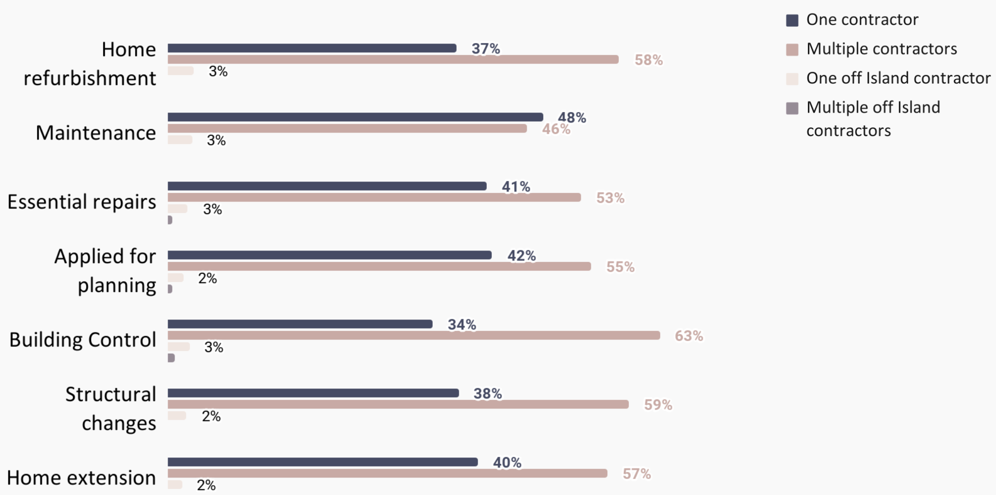


Fig.8 Contractors v. Most Frequent Project Types (n=260)
Q. For your most recent project, did you use? V. Q Have you undertaken any of the following projects?

The majority of projects weren't covered by insurance (58%). 17% were entirely covered and 14% were partly covered.

Maintenance projects were the least likely to be covered (11%). Home extensions (50%), Building Control (41%), Structural Changes (38%) and Applying for Planning Permission (31%) were more likely to be entirely covered. Essential repairs were more likely to be partly covered (27%).

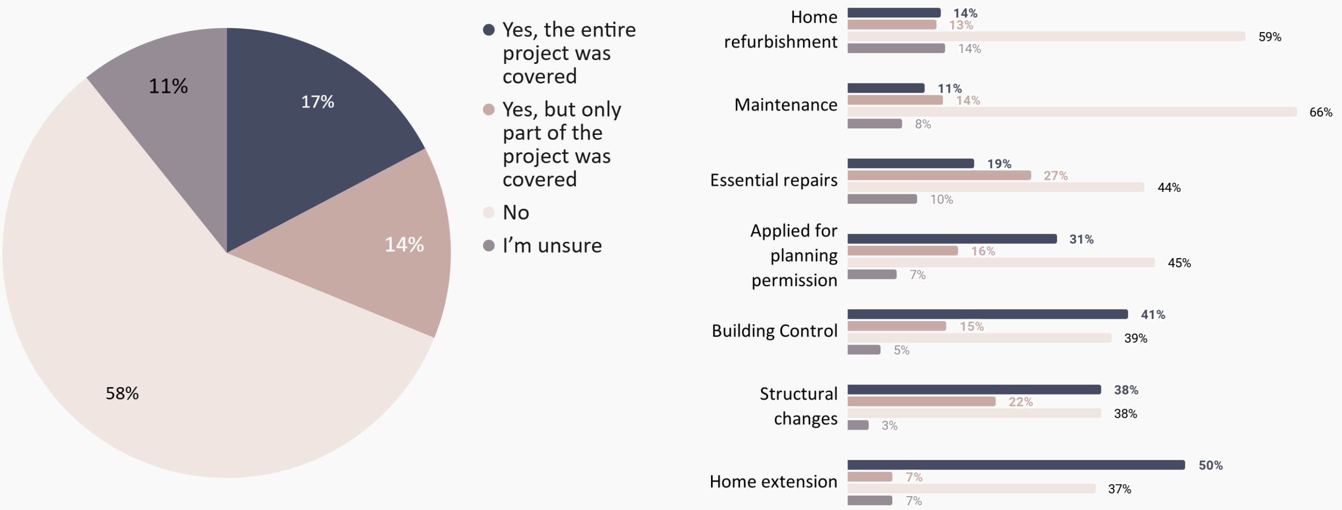


Fig.9 Insurance (n=260)

Q. Was the project covered by insurance? Q. Was the project covered by insurance? v. Q Have you undertaken any of the following projects?

Budgets

The next question asked respondents for the approximate budget of their most recent project. A range of budgets were covered in projects, £1-5k had the largest share (23%), followed by £10-20k (18%). Projects with budgets over £100k represented 15% of the sample.

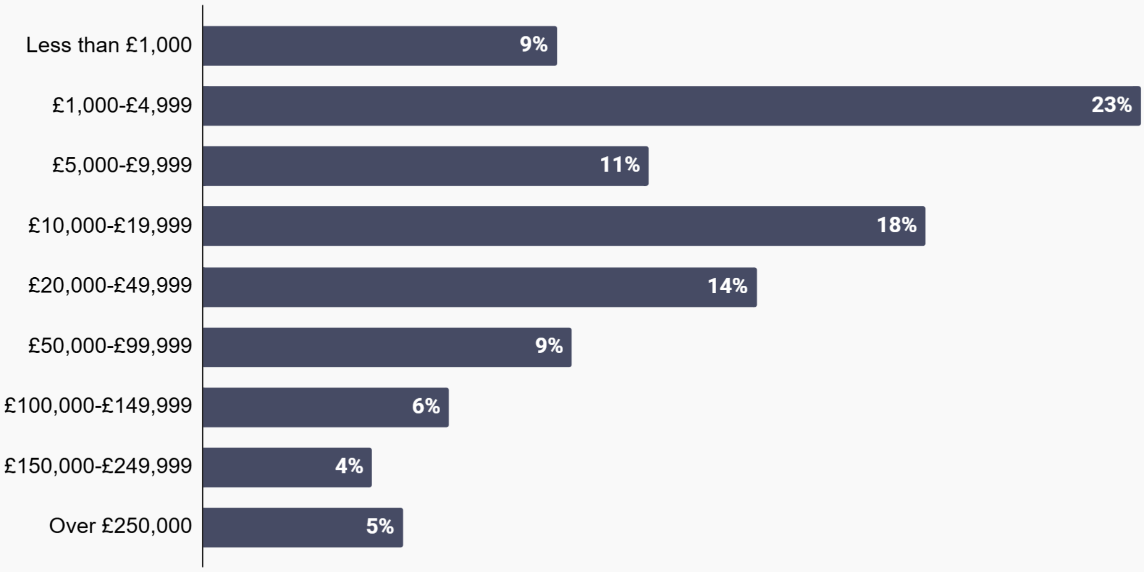


Fig.10 Budgets (n=260)

Q. What was the approximate budget for your most recent project?

Budgets tended to be higher among landlords (76% over £5k and 21% over £100k, compared to 65% and 14% for non-landlords) and projects using multiple on Island contractors (80% over £5k and 19% over £100k compared to 57% and 11% for those using one on Island contractor). Budgets were also higher for projects that were entirely covered by insurance, 30% of these had budgets over £100k.

A third (33%) of projects exceeded the initial budget. The vast majority of those (92%) paid for the increase in costs.

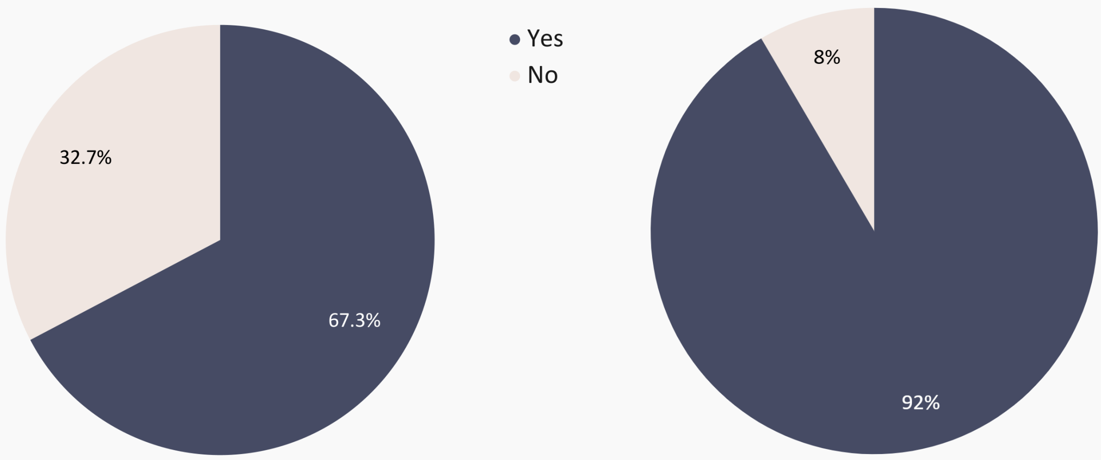
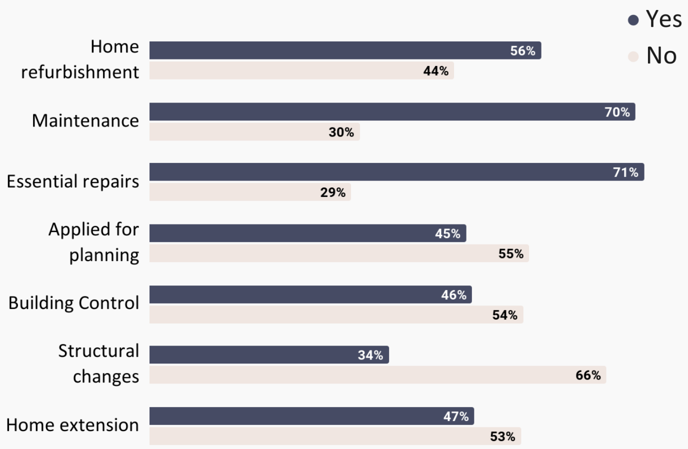


Fig.11 Staying within budget (n=260)

Q. Did your project stay within its initial budget?, Q. If not, did you pay for the increase in costs?

Those who used multiple on Island contractors were less likely to stay within the initial budget (63% compared to 74% for one on Island contractor).

When looking at the most frequent project types, those involving structural changes (66%), applying for planning permission (55%), building control (54%) and home extension (53%) were more likely to exceed the initial budget. Respondents who had engaged with contractors were also more likely to have their project exceed its initial budget, particularly those who engaged with professional services (55%), roofing (43%), glazing (42%) and electrical installation (42%).



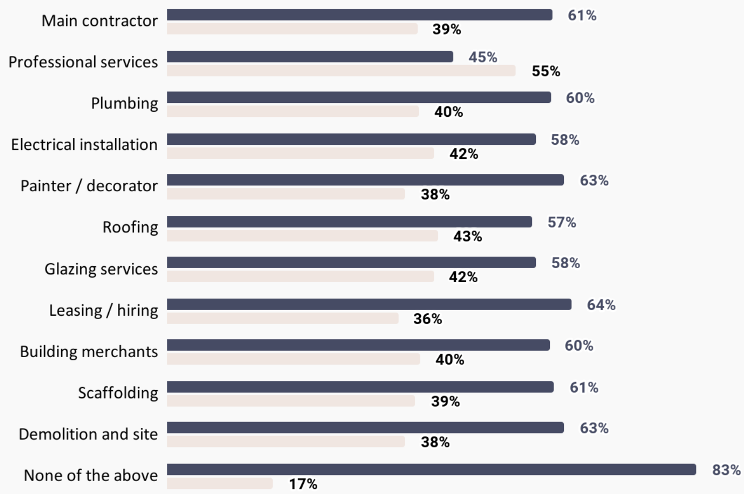


Fig.12 Staying within budget v. Project type, contractors engaged (n=260)
Q. Did your project stay within its initial budget? v. Q. Have you undertaken any of the following projects? Q. Have you engaged with any of the following when undertaking works to your property/properties?

Projects with higher budgets were more likely to exceed their initial budget. Projects with budgets of £50k and over were more likely to exceed the initial budget than stay within it.

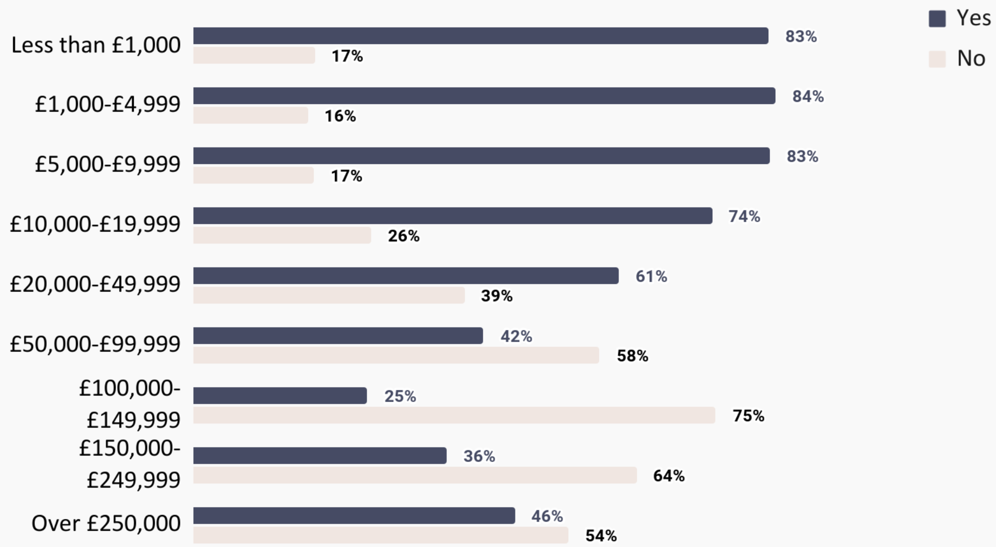


Fig.13 Staying within budget v. budget (n=260)
Q. Did your project stay within its initial budget? V. Q. What was the approximate budget for your most recent project?

Of those projects that went over the initial budget, most were overruns by 0-40% (72%). Respondents who used multiple on Island contractors, projects with higher budgets, projects that had delays and those who obtained just one quote before selecting a contractor were more likely to see larger overruns (by over 40%) in budget.

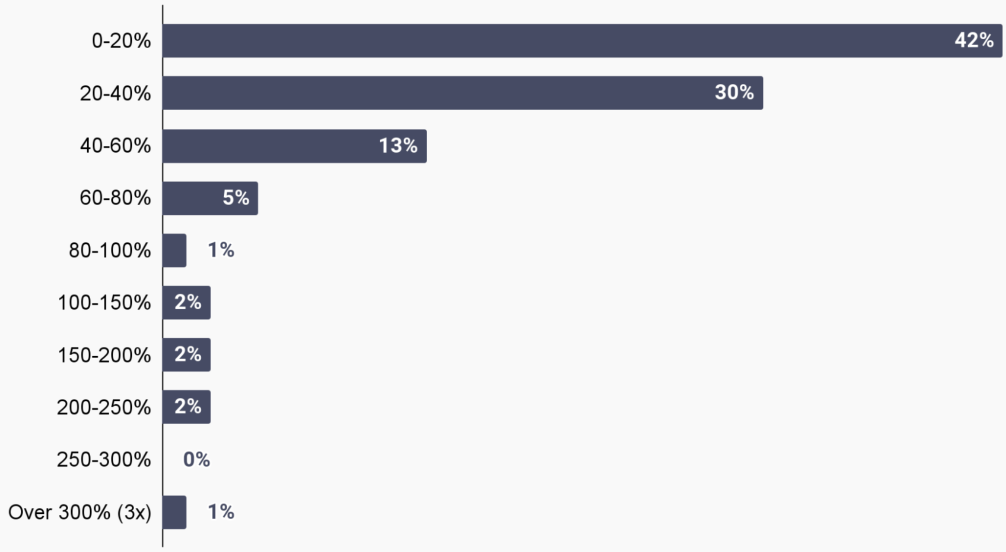


Fig.14 % over budget (n=83)
Q. By approximately what % was the project over its initial budget?

Respondents most commonly obtained just one quote before selecting a contractor (39%), 6% obtained 4 or more. Over a third (36%) said they found it difficult or very difficult to obtain quotes for their project.

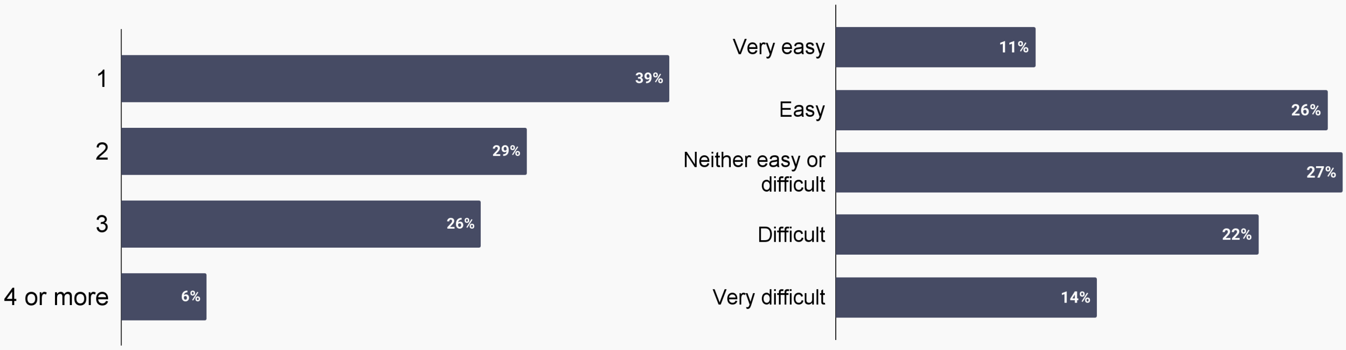


Fig.15 Obtaining quotes (n=245)

Q. For your most recent project, how many quotes did you obtain before selecting a contractor? Q. How easy or difficult was it to obtain quotes for your project?

Landlords were more likely to obtain more than one quote for their project (68% compared to 59% for non-landlords). Those who used multiple on Island contractors were also more likely to obtain more than one quote (68% compared to 51% for those using one on Island contractor). Those with project budgets over £100k were more likely to obtain 3 quotes (1: 27%, 2: 25%, 3: 40%, 4: 7.5%).

Landlords also reported more difficulties obtaining quotes, with 48% saying it was difficult or very difficult. Similarly, those who used multiple on Island contractors were also more likely to find it difficult or very difficult to obtain quotes (42% compared to 28% for those using one on Island contractor). Projects that experienced delays had greater difficulties obtaining quotes, with 50% reporting challenges compared to 18% for projects that had no delays.

Delays

The majority of respondents (58%) had delays in their most recent project.

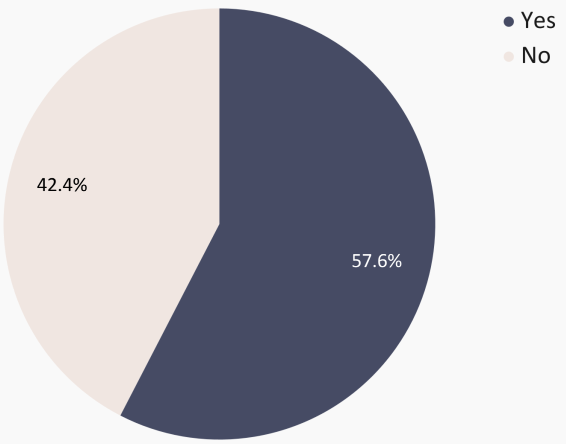


Fig.16 Delays (n=260)

Q. Were there any delays in your most recent project?

Looking at the most frequent project types, those involving applying for planning permission (79%), Building Control (75%) and structural changes (75%) were more likely to face delays.

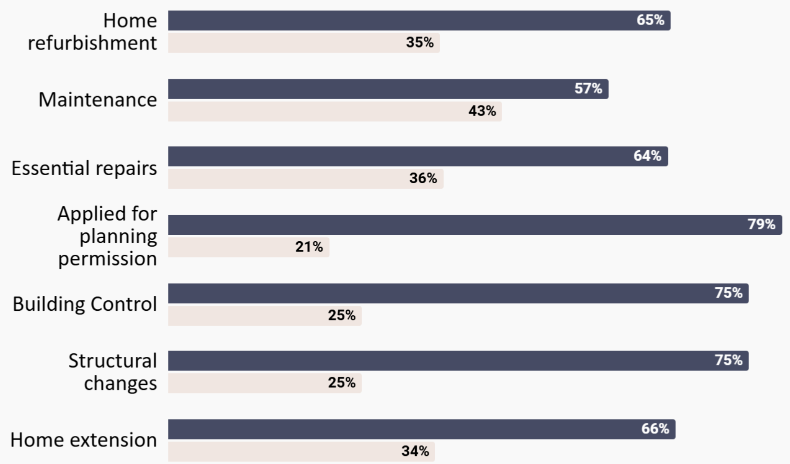


Fig.17 Delays v. Most frequent projects (n=260)

Q. Were there any delays in your most recent project? v. Q. Have you undertaken any of the following projects?

Landlords had more delays (72% compared to 54% for non-landlords). Those who used multiple on Island contractors were also more likely to have delays at (66% compared to 48% for those using one on Island contractor).

Delays in projects were closely linked to projects going over the initial budget, 88% of projects that saw no delays stayed within the initial budget, compared to 52% of those that saw delays. Projects with higher budgets were also more likely to have delays as can be seen below, particularly projects with budgets over £50k.

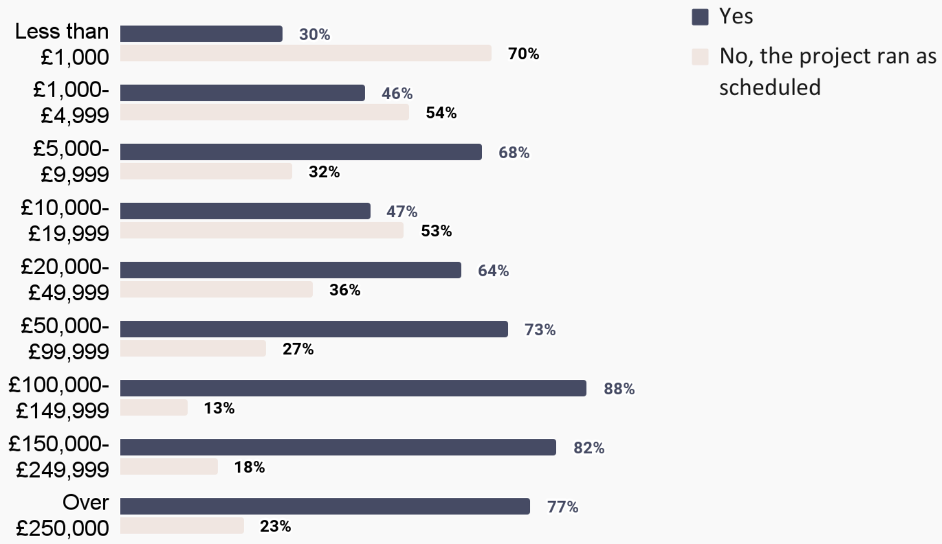


Fig.18 Delays v. Budgets (n=260)

Q. Were there any delays in your most recent project? v. Q. What was the approximate budget for your most recent project?

Most respondents said these delays were caused by contractor availability issues (59%). There was then a drop-off to the next most common factor, materials delays (36%).

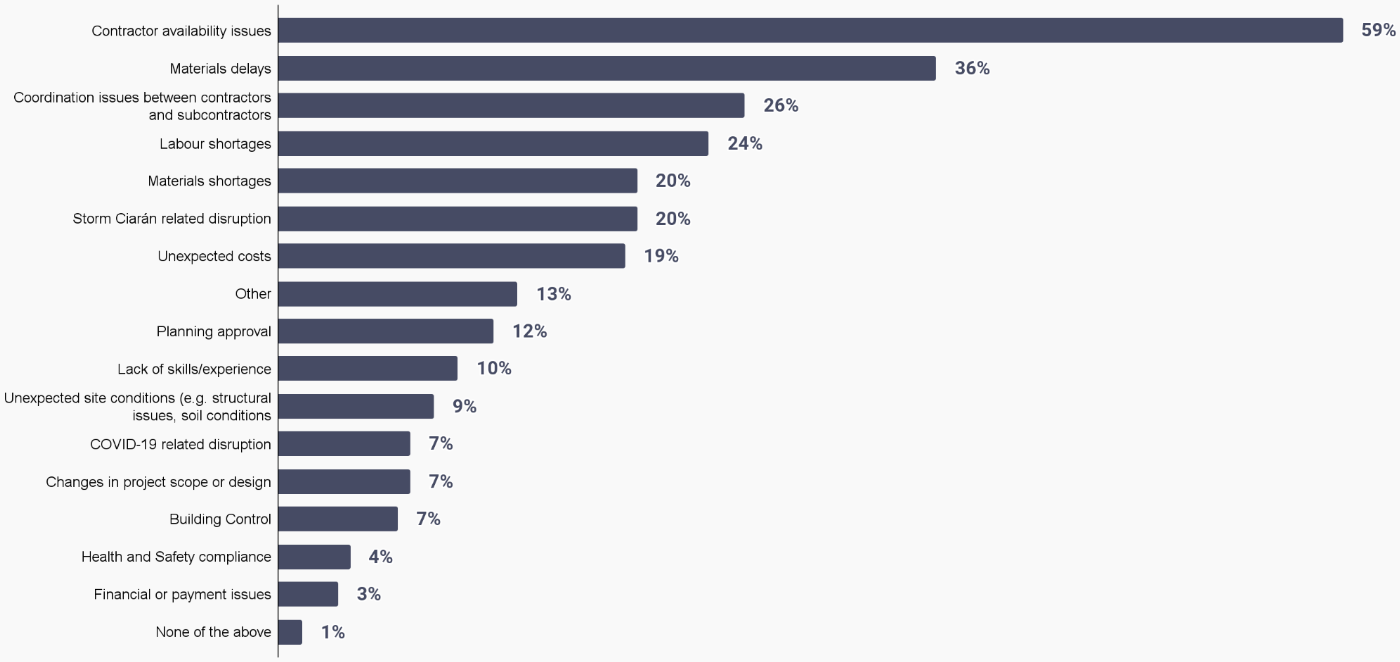


Fig.19 Reasons for delays (n=260)

Q. Which of the following factors, if any, were responsible for those delays? (Please select all that apply)

Those with higher project budgets were more likely to have delays caused by materials delays (58%), followed by contractor availability issues (55%):

Top 5 factors for projects with budgets **over £100k**:

1. *Materials delays 58%*
2. *Contractor availability issues 55%*
3. *Coordination issues between contractors. 48%*
4. *Planning approval 30%*
5. *Materials shortages 30%*

Top 5 factors for projects with budgets **under £20k**:

1. *Contractor availability issues 61%*
2. *Materials delays 27%*
3. *Labour shortages 22%*
4. *Storm Ciarán related disruption 21%*
5. *Materials shortages 21%*

Consumer Choice

The next question asked respondents whether they believed there were enough contractors of the specific type that they engaged with. For those who had not engaged with such contractors, they had the option to select ‘I’m unsure or N/A’.

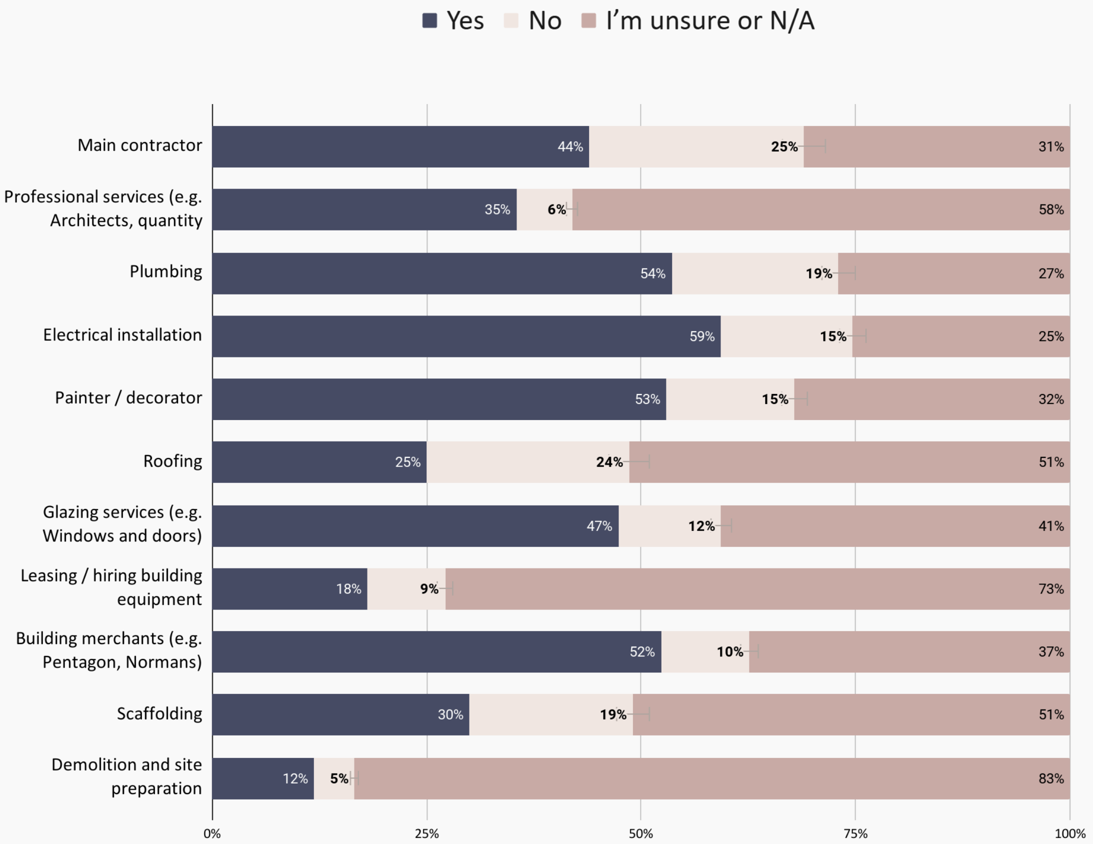


Fig.20 Contractor choice (n=246)

Q. Thinking about your recent construction experiences, were there enough contractors available to choose from for the following? (Please answer for each row)

Roofing stands out as an area with a potential shortage of contractors, with nearly equal “Yes”(25%) and “No” (25%) responses. The same can be said for scaffolding, with “Yes” (30%) and “No” (19%).

Well served areas include Professional services (“Yes” 35%, “No” 6%), Building merchants (“Yes” 52%, “No” 10%), Electrical installation (“Yes” 59%, “No” 15%), Painter/decorator (“Yes” 53%, “No” 15%) and Glazing services (“Yes” 47%, “No” 12%).

Views on the Sector

Most respondents (63%) said the cost of construction has increased significantly compared to previous years. Just 1% said costs have stayed about the same.

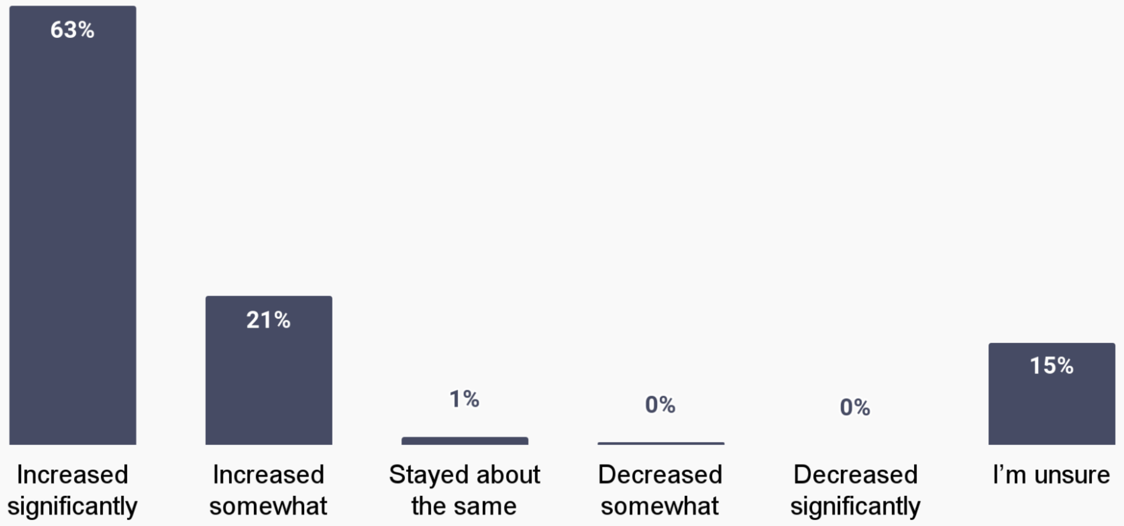


Fig.21 Cost of construction (n=259)

Q. Compared to previous years, in your experience how has the cost of construction changed...?

The following segments were more likely to select 'increased significantly':

- Landlords (68% compared to 61% for non-landlords)
- Those who used multiple on Island contractors (70% compared to 54% for those using one on Island contractor)
- Those with higher project budgets, particularly those over £100k (83%)
- Those with projects that had delays (69%)

We then asked respondents to rate their recent construction experiences (on a scale of 1-10), across a range of categories to gauge key strengths and weaknesses.

Key strengths:

Mirroring qualitative findings, quality of the work (7.08) received the highest overall rating, this was followed by conduct of contractors (6.69) and quality of materials (6.68).

Key weaknesses:

Affordability (5.17) received the lowest overall rating, followed by the range of options (5.37), environmental practices (5.47) and staying within the initial timeline (5.49).

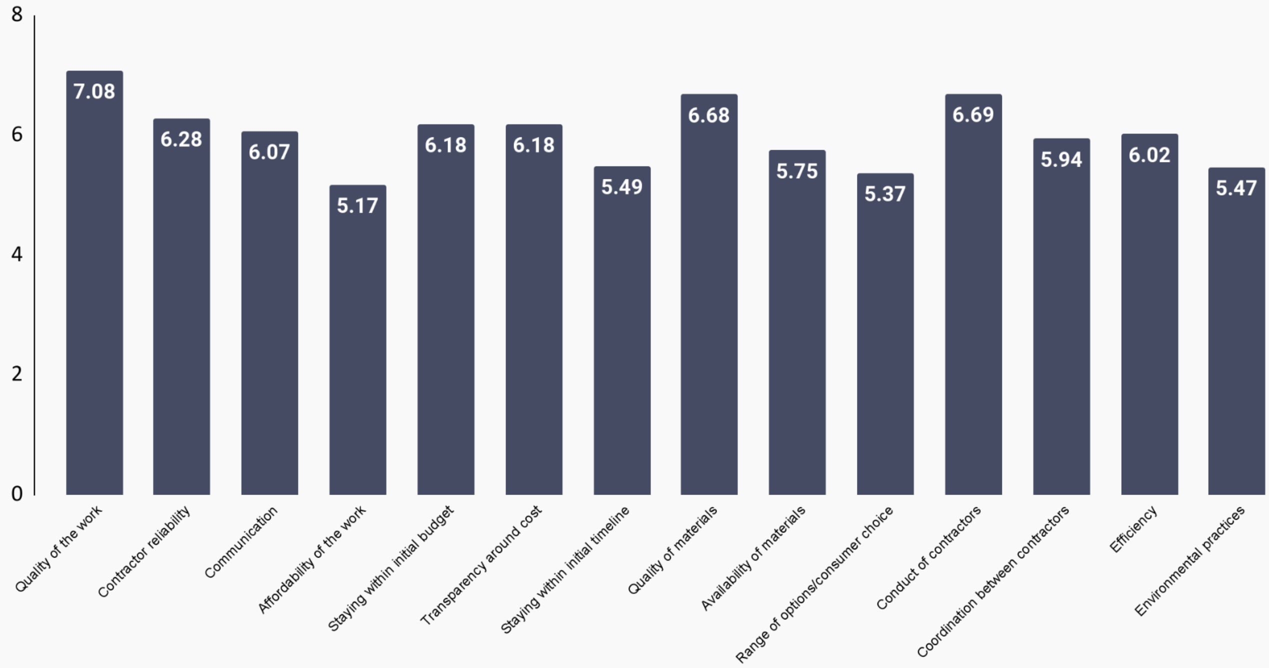


*Fig.22 Rating experiences (n=238) *Mean scores*

Q. Please rate your recent construction experiences in Jersey based on the following criteria. (Where 1 is extremely poor and 10 is excellent):

When looking at ratings compared to project budgets, scores were lower across the board for those who had higher project budgets. This was particularly true for those with budgets over £100k, staying within initial timeline (3.76) was rated lowest for this segment, followed by affordability (3.87).

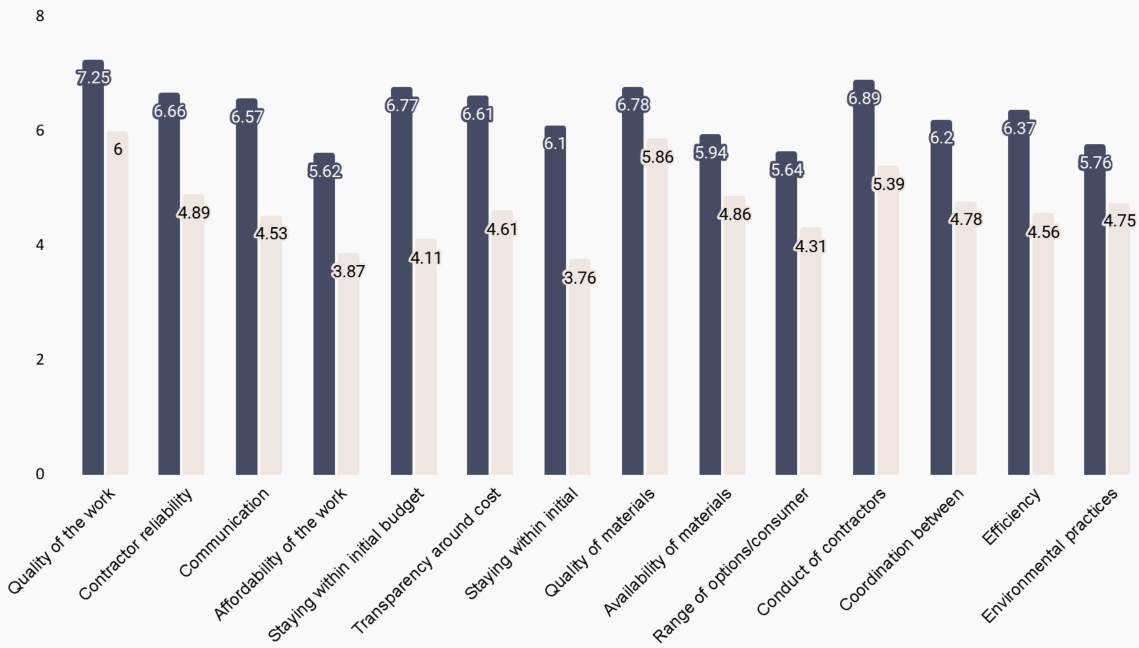
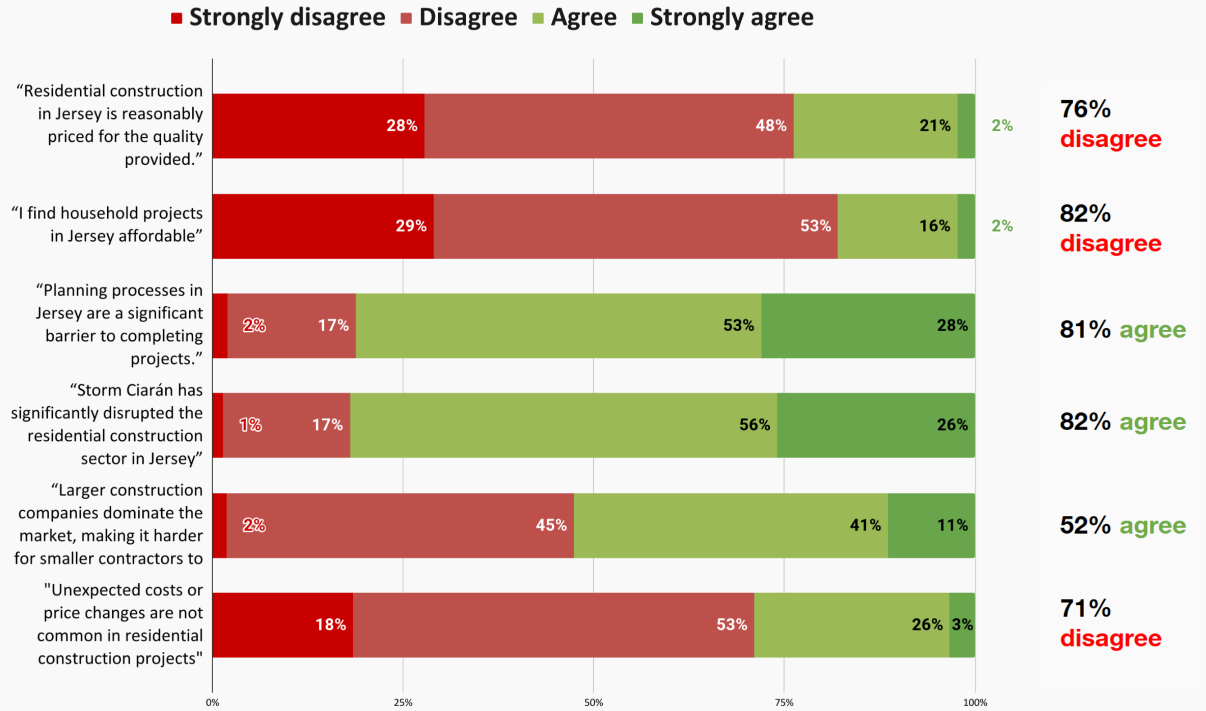


Fig.23 Rating experiences v. Higher budgets (n=238)

Q. Please rate your recent construction experiences in Jersey based on the following criteria. (Where 1 is extremely poor and 10 is excellent) v. Q. What was the approximate budget for your most recent project?

The next question used a Likert scale with some attitudinal statements (both positive and negative) to identify respondent perceptions and sentiment towards various aspects of the sector. By combining the "Agree" and "Strongly agree" percentages, as well as the "disagree" and "strongly disagree" we can get a better understanding of the overall positive or negative sentiment towards each statement.



Notable findings include 82% disagreeing with "I find household projects in Jersey affordable", 82% agreeing that "Storm Ciarán has significantly disrupted the residential construction sector in Jersey" and 81% agreeing that "Planning processes in Jersey are a significant barrier to completing projects.".

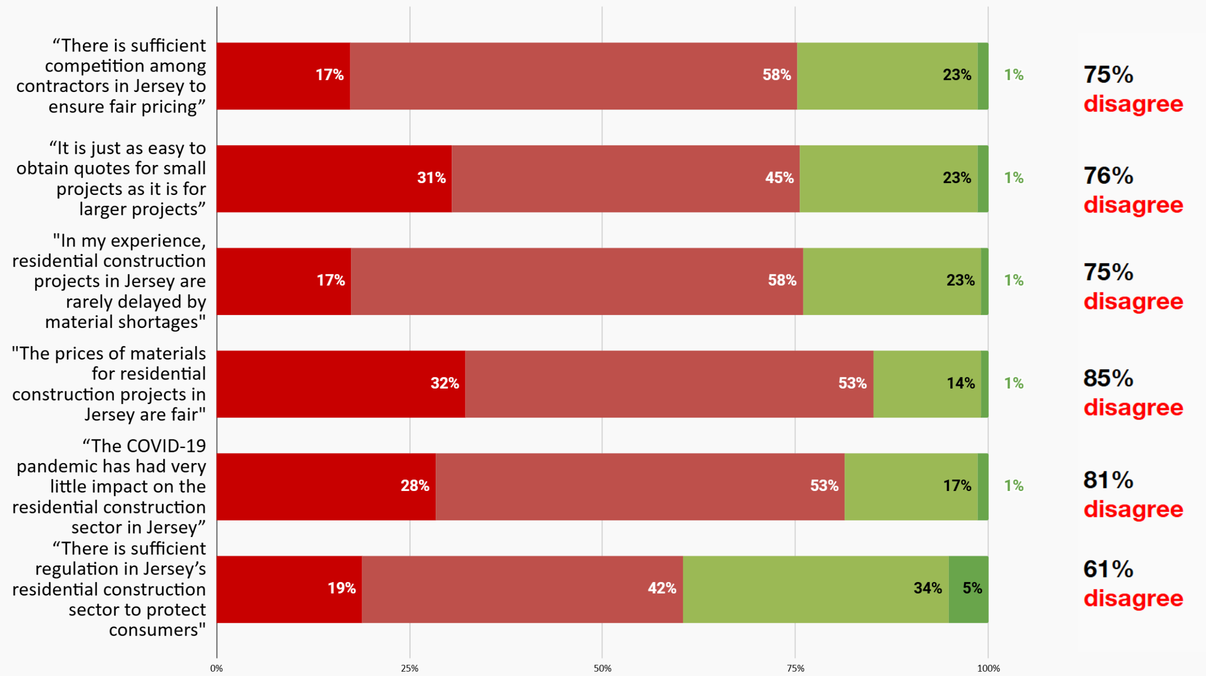


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Fig.24 Attitudinal Statements (n=220)

Q. Thinking about your recent construction experiences in Jersey, please indicate how much you agree or disagree with the following statements

Notably, 85% disagreed with "The prices of materials for residential construction projects in Jersey are fair", 76% disagreed with “It is just as easy to obtain quotes for small projects as it is for larger projects” and 75 % disagreed with “There is sufficient competition among contractors in Jersey to ensure fair pricing”/"In my experience, residential construction projects in Jersey are rarely delayed by material shortages".

Some perspectives on statements by segment:

“I find household projects in Jersey affordable”

*Respondents with **higher project budgets >£100k** were more likely to disagree or strongly disagree.*

*Those with projects that **had delays** were more likely to disagree or strongly disagree at 87% (77% for no delays).*

"The prices of materials for residential construction projects in Jersey are fair"

*Respondents with **higher project budgets >£100k** were more likely to strongly disagree.*

“Larger construction companies dominate the market making it harder for smaller contractors to compete”

*Respondents with **lower project budgets <£20k** were more likely to agree or strongly agree.*

"Unexpected costs or price changes are not common in residential construction projects"

*Respondents with **higher project budgets >£50k** were much more likely strongly disagree.*

*Those with projects that **had delays** were more likely to disagree or strongly disagree*

“There is sufficient regulation in Jersey’s residential construction sector to protect consumers"

*Those with projects that **had delays** were more likely to disagree or strongly disagree at 69% (51% for no delays).*

"In my experience, residential construction projects in Jersey are rarely delayed by material shortages"

*Those with projects that **had delays** were more likely to disagree or strongly disagree at 82% (67% for no delays).*

Overall average score of **2.9/5** (mean score) for how well companies that provide construction services are meeting the needs of Islanders. 3/5 (45%) was the most common score among respondents.

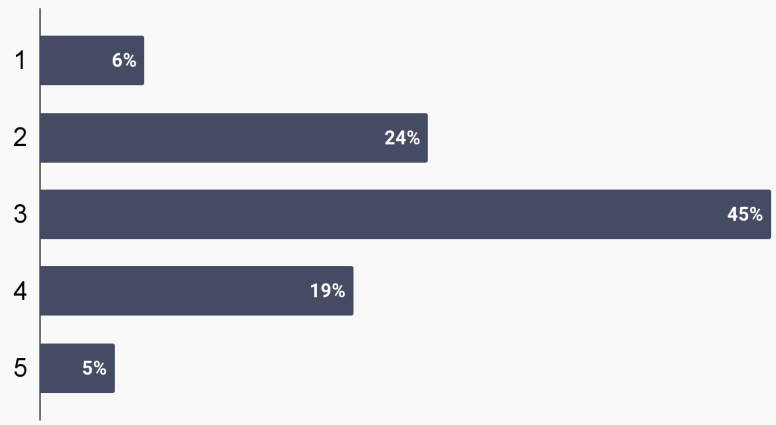


Fig.25 Overall score (n=216)

Q. Overall, how well do you think companies that provide construction services to residents are meeting the needs of Islanders? (Please rate on a scale of 1-5, where 1 is not well at all and 5 is very well)

Echoing earlier findings, scores were lower for projects with higher budgets, with a score of **2.57/5** for projects with budgets over £100K (46% scoring a 1 or 2). The same is true for projects which had delays, with a score of **2.72/5** (38% scoring a 1 or 2).

Respondents were then asked what they believed to be the most significant issues in residential construction in Jersey. This question allowed a selection of up to 5 issues from the below.

Costs selected by 83%, followed by identifying reliable, quality contractors at 69%.

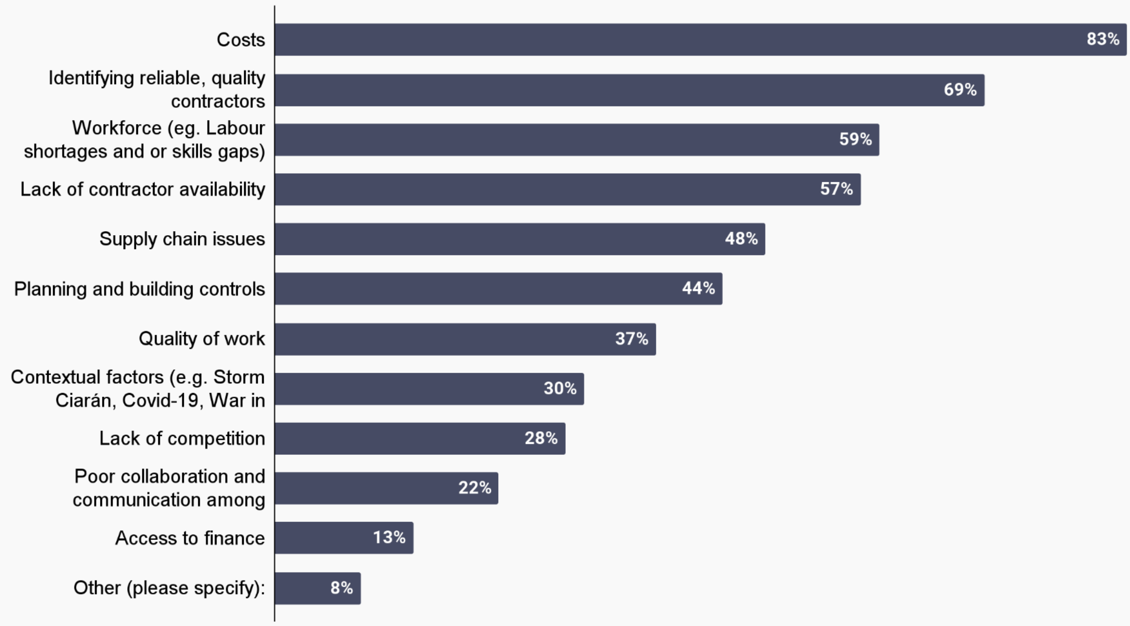


Fig.26 Most significant issues (n=215)

Q. Based on your recent construction experiences, which 5 of the following do you believe to be the most significant issues in Jersey: (Please select 5 from the below)

Respondents' choices were then piped through to the next question, which asked them to rank those issues in order to better gauge the relative importance of each.

There was a similar pattern here, with costs way out in front (1883 ranking points), a drop off to identifying reliable, quality contractors (1472 ranking points), then another gap to lack of contractor availability (1163 ranking points) and workforce (1159 ranking points).

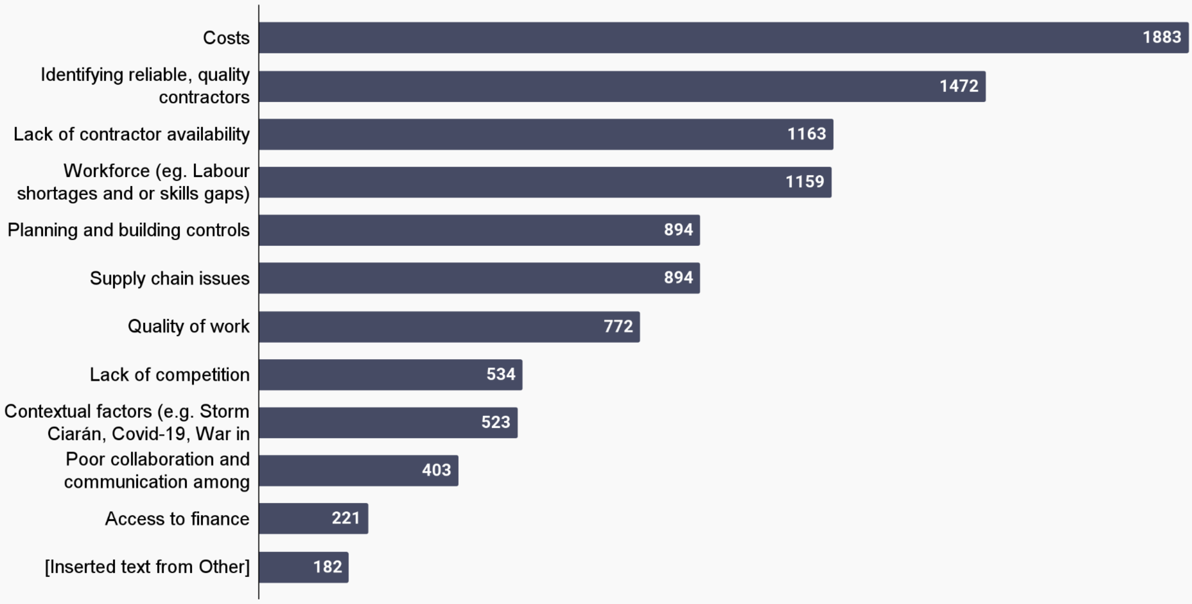


Fig.27 Most significant issues ranked (n=215)

*(*The score is a weighted calculation. Items ranked first are valued higher than the following ranks)*

Q. Based on your recent construction experiences, please now rank the options you selected in order of what you believe to be the most significant issue in Jersey:

Open-ended

The final question of the survey was an open-ended text box, allowing respondents to share their views in a more detailed manner. The responses were coded and the wordcloud below shows a visual representation of the responses. The question asked 'If you could change one thing about residential construction in Jersey, what would it be?'

High costs (of both materials and labour) was most mentioned, followed by planning issues:

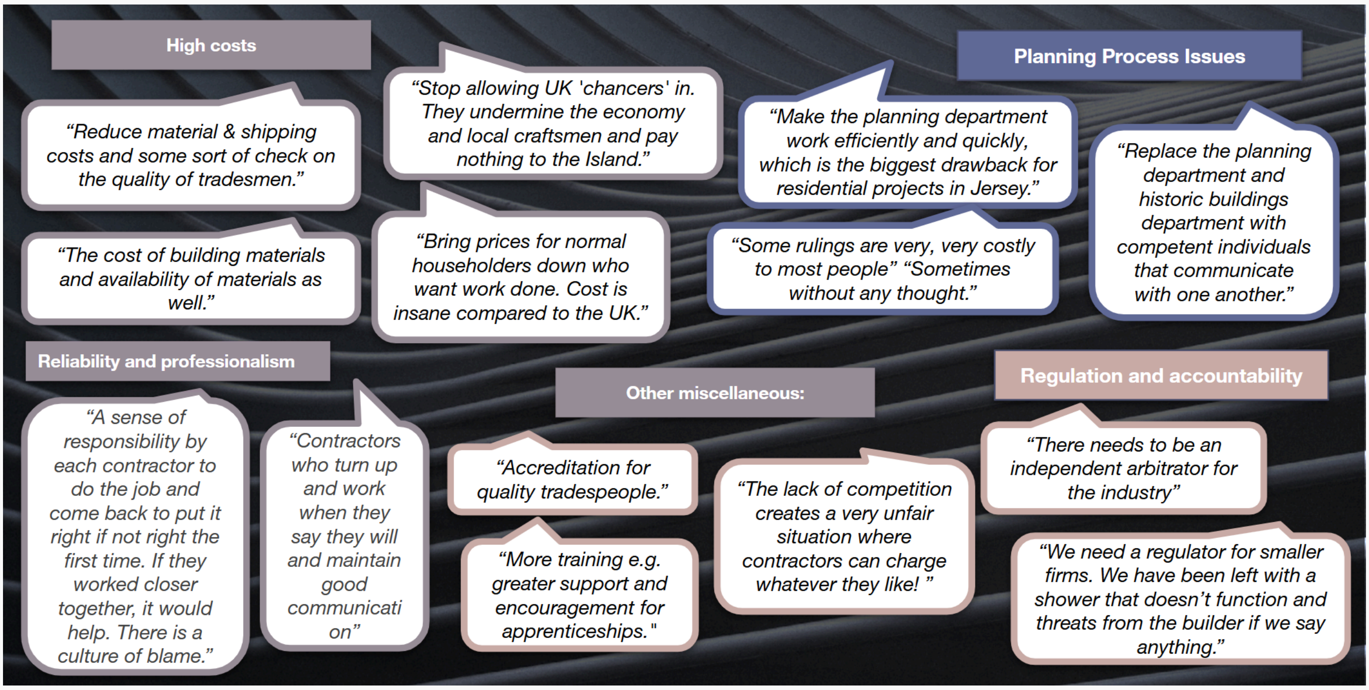
Response categories:

1. *High costs (materials x27 and labour x13) x40*
2. *Planning Issues x28*
3. *Need for regulation and accountability standards x25*
4. *Reliability and Professionalism x21*
5. *Competition and Market Dynamics x15*
6. *Transparency in Pricing and Quotes x14*
7. *Skilled Workforce and Training x12*
8. *Ease of Access to Materials x10*
9. *Consumer Protection and Support x9*
10. *Streamlining process x7*
11. *Sustainability x6*

Fig.28 Open-ended responses (n=152)

Q. If you could change one thing about residential construction in Jersey, what would it be?

A selection of verbatim quotes from the open-ended question, to illustrate some examples of responses that went into each response category:



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 consumers within the Jersey residential construction sector and large differences have been highlighted throughout as relevant.

88% of respondents had **work done as a customer in the last 3 years,** all other respondents were screened out**:**

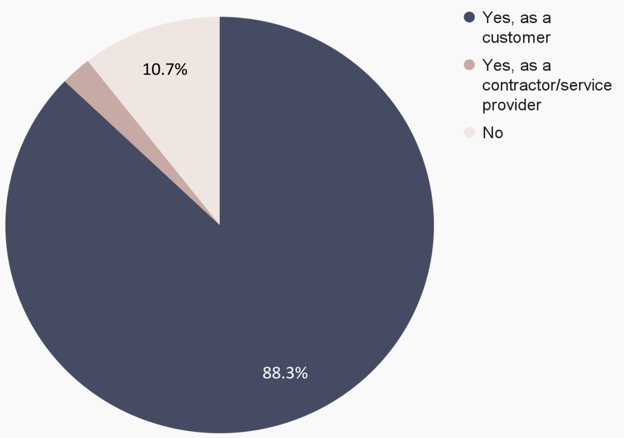


*Fig. 29. Survey demographics - **customers** (n=301)*

Q. Have you had any work done on your property/properties in the past 3 years?

20% had properties in Jersey that they **rent out to others**:

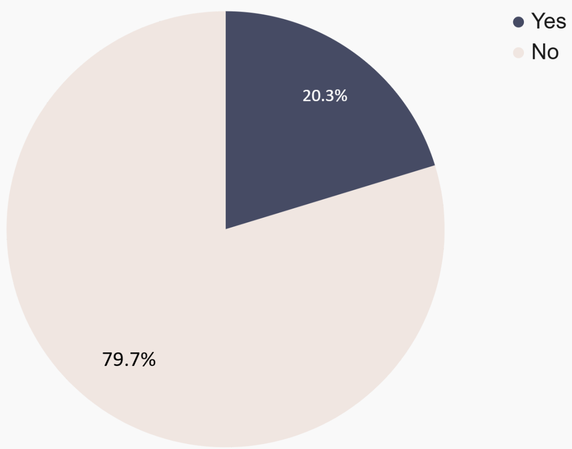


*Fig. 30. Survey demographics - **landlords** (n=301)*

Q. Do you own any properties in Jersey that you rent out to others?

Most respondents live in an **'owner-occupied house'** (78%). 9% 'owner-occupied flat' and 10% private rental:

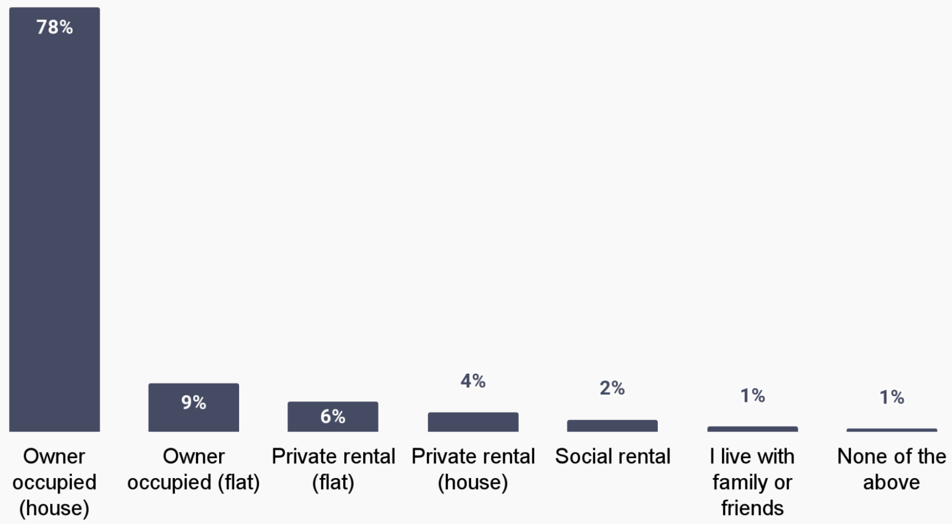


Fig. 31. Survey demographics - ***Housing situation*** *(n=301)*

Q. Which of the following best describes your current housing situation?

Age (respondents under the age of 17 were screened out):

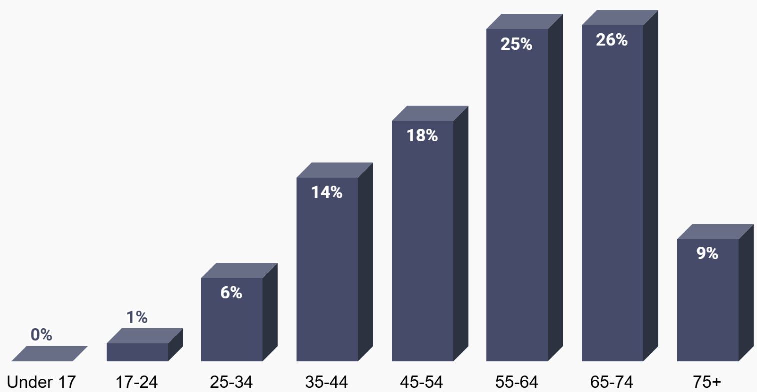


Fig. 32. Survey demographics - ***Age*** *(n=301)*

Q. Which age category do you fall into?

Parish:

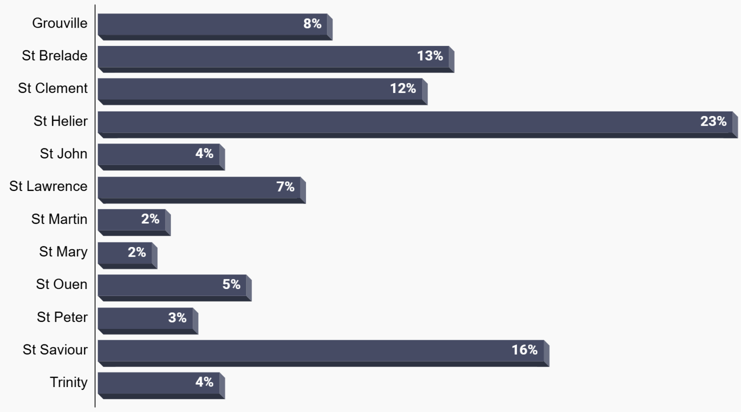


*Fig. 33. Survey demographics - **Parish** (n=207)*

Q. Which parish do you live in?

Ethnicity:

*Fig. 34. Survey demographics - **Ethnicity** (n=205)*

Q. Which of the following do you identify as?

Employment:

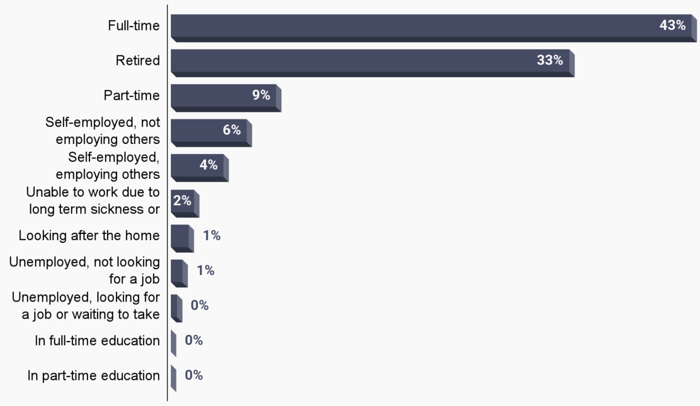


*Fig. 35. Survey demographics - **Employment** (n=208)*

Q. Which of the following best describes your current work situation?

Industry:

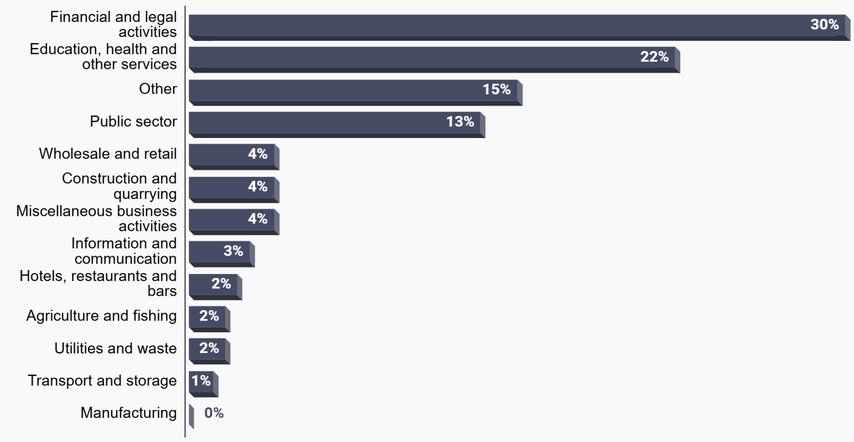


*Fig. 36. Survey demographics - **Industry** (n=183)*

Q. If applicable, which of the following best describes your industry sector?

Lived in Jersey:

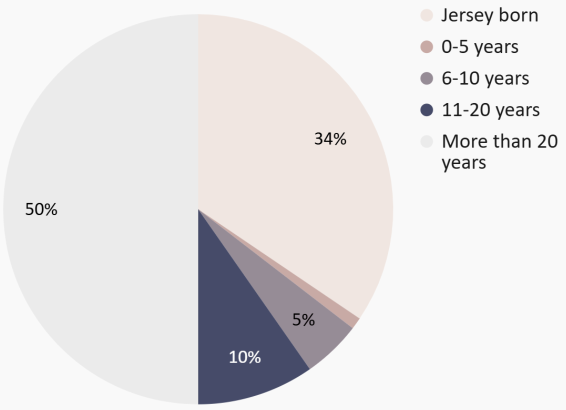


*Fig. 37. Survey demographics - **lived in Jersey** (n=206)*

Q. For how long have you lived in Jersey?

Household income:

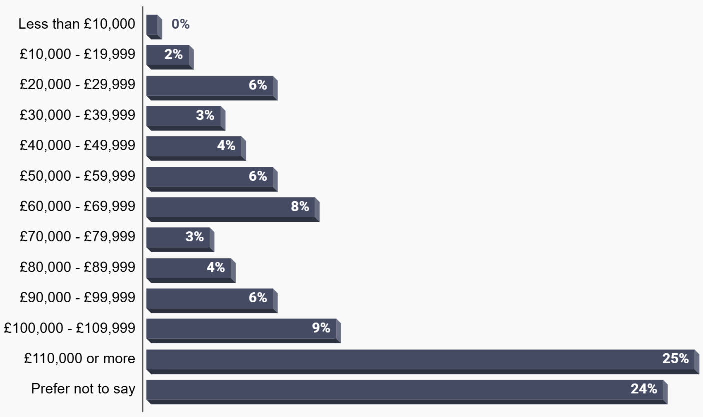


*Fig. 38. Survey demographics - **household income** (n=206)*

Q. Approximately, what is your total gross household income (before tax and social security deductions)?

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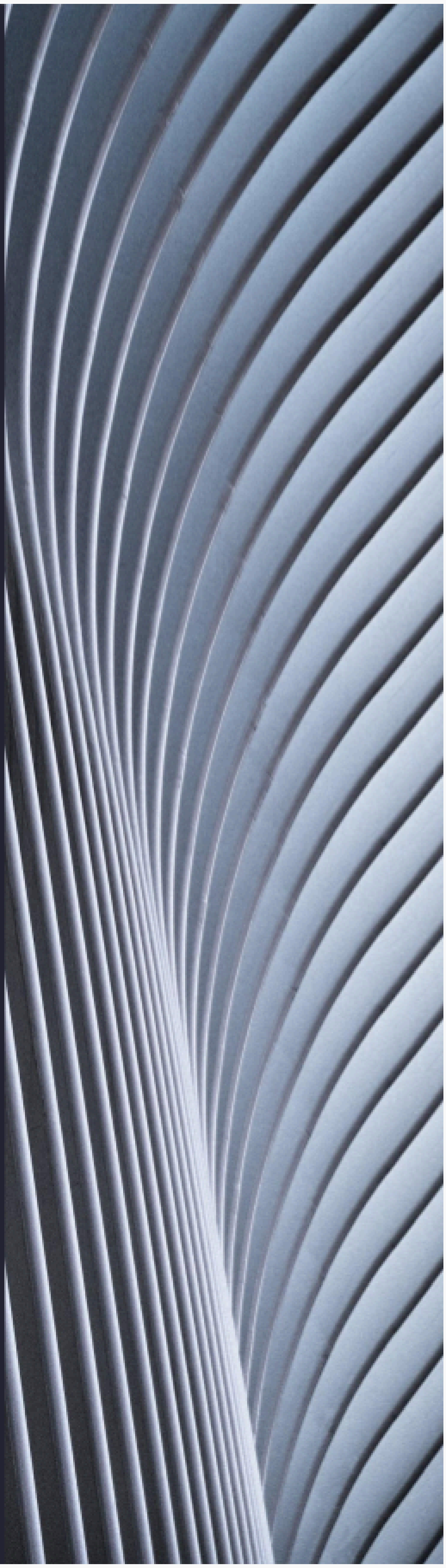
Research Report



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