States of Jersey

Statistics Unit

A Third Supermarket operator in Jersey?

Survey Report

A Third Supermarket operator in Jersey?

Introduction

This report presents the findings from a survey commissioned by the Economic Development Department, which has been run, analysed and published independently by the Statistics Unit.

The survey aims to provide a picture of the attitudes and opinions of Jersey residents towards food shopping in the Island. The postal survey was sent to over 2,000 households at random, and received an extremely high response rate of 60%.

Given the size of the dataset, and using weighting to ensure all subgroups of the population are suitably represented in the analysis, we can be confident that the **inferences drawn in this report robustly represent the views of Island residents.**

This report is divided into three sections:

Section 1: Attitudes to food shopping in general

This section describes how important different aspects of food shopping are to Islanders – aspects such as "Value for money", "Quality of products" and "Availability of locally produced food". Respondents were also asked to prioritise the list of factors into which are the most important to them.

Section 2: Opinions of current food shopping in Jersey

Section 2 focuses on residents' opinions of the current situation in Jersey (at the time of the survey – Autumn 2008) with regards to food shopping. The same factors included in Section 1, for example "Value for money" were explored, with Jersey residents being asked to rate them from "Very good" through to "Very poor".

Section 3: Attitudes towards having a third supermarket operator in Jersey

The final section analyses whether people agree or disagree (or remain neutral) with regards to a number of statements describing potential consequences of Jersey having a third supermarket operator - for example "If Jersey has a third supermarket operator, I am concerned that smaller shops might close" and "If Jersey has a third supermarket operator, I think quality of products in the Island might improve". Section 3 reports the proportion of Islanders who are in favour of having a third supermarket, and, if they *are* in favour, which type they would like.

Within each section, the data is analysed for Jersey residents as a whole, but also, where it is appropriate, by the age-group of the respondent, and the respondent's household income. Differences between these subgroups, if they are significant, help to illustrate how, for example, older age-groups, or households with lower incomes, might have different attitudes and opinions.

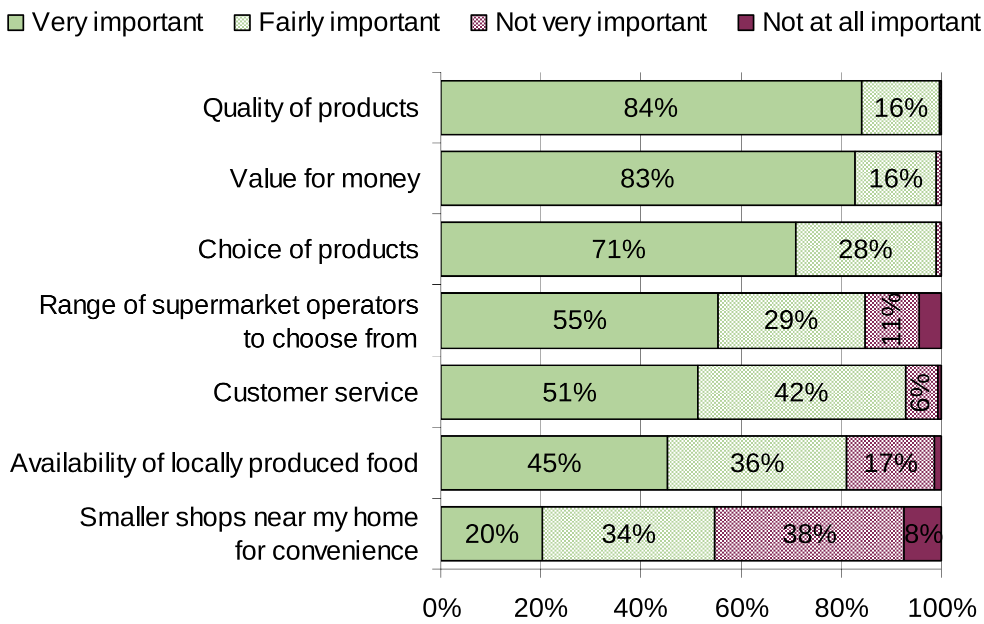
Section 1: Attitudes to food shopping in general

The first section of the survey questionnaire explored people's attitudes to food shopping in general, asking the importance of a number of factors when shopping for food in the Island. Figure 1.1 illustrates the pattern of responses for each factor, with the majority being considered "Very" or "Fairly important".

Two factors were considered "Very important" by over four-fifths of residents: "Quality of products" (by 84%) and "Value for money" (by 83%). "Choice of products" was considered to be "Very important" by nearly three-quarters (71%) of people.

In contrast, only half felt that having "Smaller shops near their home for convenience" was important, whilst nearly a fifth (19%) thought that "Availability of locally produced food" was not important.

Figure 1.1 How important to you are the following with regards to food shopping in the Island?



The results were similar across the age-groups, although a trend was noted for "Customer service" and "Availability of locally produced food", whereby these factors were considered *more* important by *older* age groups than by the younger age-groups. Almost two-thirds of those aged 65 years and over considered "Customer service" (65%) and "Availability of locally produced food" (61%) as "Very important" compared to one-third of those aged 16 to 24 years old (34% and 29% respectively).

Looking into the results by equivilised household income[1] shows that for those in the lowest income quintile[2], 93% considered "Value for money" as "Very important", compared to 68% of those in the highest income quintile.

[1] In order that analysis by income could be conducted on a standardised basis, total household income (earned and unearned) was adjusted according to the number of adults and children living in the household. The resulting 'equivilised income' is used throughout this report. See Appendix for more details.

[2] The equivilised income distribution was divided into fifths ("quintiles"), with the lowest 20% of households in the first income quintile and so on, up to the highest, or top, income quintile.

From the above set of results, it can be difficult to prioritise the factors which people consider to be important with regards to food shopping, as understandably many people consider a number of the aspects to be “Very important”. However, the subsequent question in the survey sought to prioritise the list of factors into the top three most important ones, by asking respondents which is the *most* important to them, followed by the second- and third-most important factors.

Table 1.1 gives the percentages of people who chose each factor as one of their top three choices.

Table 1.1 Percentage who choose each factor as one of their top three most important factors with regards to food shopping in Jersey

	Percentage
Value for money	81
Quality of products	67
Choice of products	55
Range of supermarket operators to choose from	35
Availability of locally produced food	23
Customer service	13
Smaller shops near home for convenience	7
Other	2

Four-fifths (81%) of people chose “Value for money” as one of their top three most important factors. “Quality of products” was the next most frequently chosen factor, with two-thirds (67%) of people considering this as one of their top three most important factors.

The responses to this question were also analysed by scoring each response, giving a score of three for the factor chosen as the most important, a score of two for the second-most important factor and a score of one for the third-most important factor. Those factors not chosen received a score of zero. By summing the scores for each factor, across each respondent, the factors could be ranked in order of the highest score (this will be the factor which has been chosen most often, and with greater importance) down to the lowest score (the factor chosen least often, and with least importance).

Table 1.2 shows the ranking results derived from this scoring method. The order is the same as in Table 1.1, showing how this order of importance is consistent across both methods of analysis.

Table 1.2 Which factor is the most, second-most and third-most important to you? *(Scored rank, as described in the text above)*

	Scored Rank (1 = most important factor)
Value for money	1
Quality of products	2
Choice of products	3
Range of supermarket operators to choose from	4
Availability of locally produced food	5
Customer service	6
Smaller shops near home for convenience	7
Other	8

Using this scoring technique and cross-analysing by equivilised household income, it was seen that the top three factors ranked as most important did not change across the income distribution, as shown in Table 1.3. The 4th and 5th most important factor for those in the upper quintile were the same as the 5th and 4th most important factors for those in the other income quintiles.

Table 1.3 Order of importance of factors when food shopping in Jersey**, by equivilised income quintile** (1 = most important factor, within that income group)

	Equivilised household income quintile				
	Lowest (1st)	2nd	3rd	4th	Highest (5th)
Value for money	1	1	1	1	1
Quality of products	2	2	2	2	2
Choice of products	3	3	3	3	3
Range of supermarket operators to choose from	4	4	4	4	5
Availability of locally produced food	5	5	5	5	4
Customer service	6.5	6	6	6	7
Smaller shops near home for convenience	6.5	7	7	7	6
Other	8	8	8	8	8

Repeating the analysis by **age**, showed that again for all age-groups, the top three most important factors were “Value for money, “Quality of products”, and “Choice of products”, in that order. “Value for money” was given as the top most important factor by all age-groups, and this was particularly true for those aged 65 years and over of whom nearly three-quarters (71%) identified this as the *top* most important factor for them.

The importance of “Smaller shops near home for convenience” was ranked 7th or 8th overall by age-groups under 55 years, but for those aged 55 or over this factor was the 6th most important aspect of food shopping.

A number of people added other factors which were important to them in this section. The most frequently identified additional factors were parking facilities, supporting local farmers and products, and availability of organic and free-range food.

Section 2: Opinions of current food shopping in Jersey

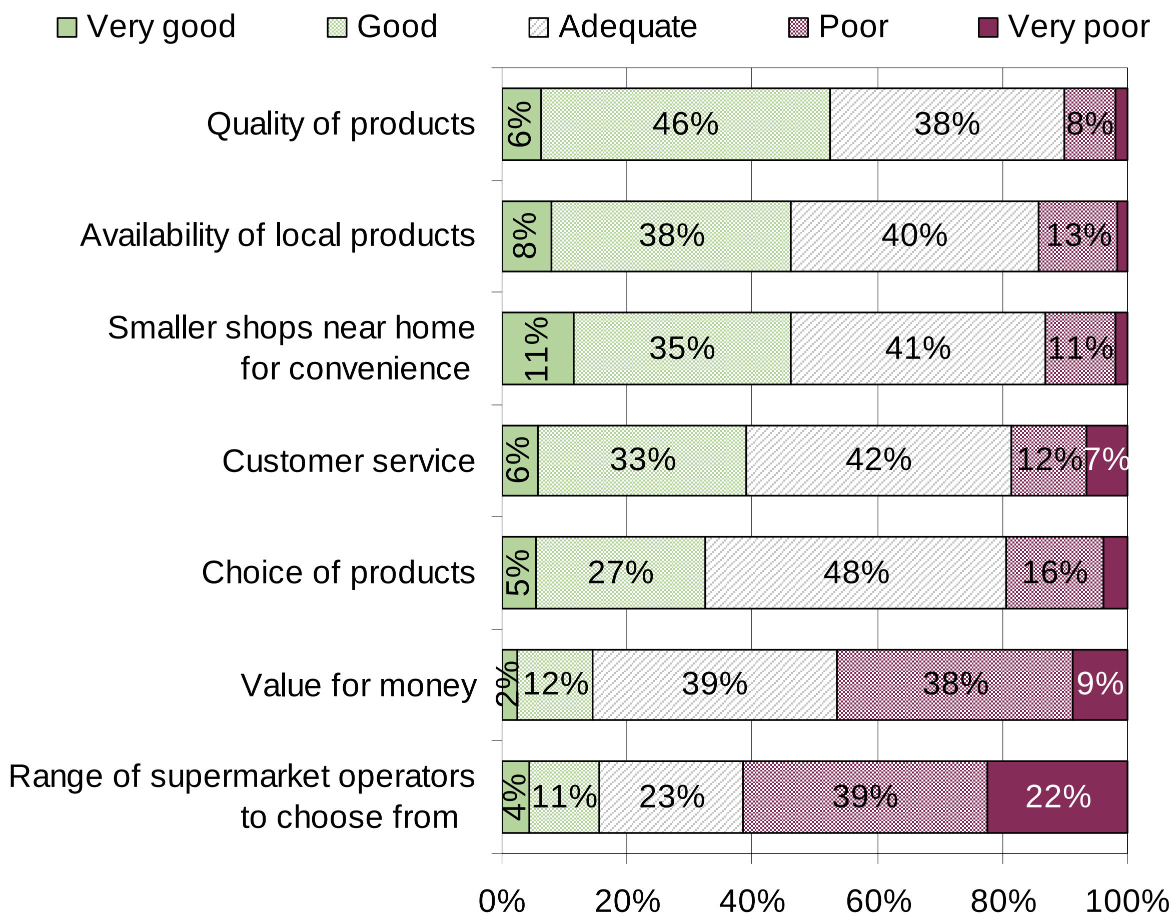
The second section of the questionnaire asked respondents for their opinions on current food shopping in Jersey, with regards to the same factors as in Section 1. Figure 2.1 summarises the results of this section.

People were most positive about the "Quality of products", "Availability of locally produced food" and "Smaller shops near my home for convenience" in Jersey at the time of the survey.

However, even for these factors only around half of residents rated them as "Good" or better, whilst a further two-fifths considered them to be "Adequate".

"Value for money" and "Range of supermarket operators" were the two factors with the highest negative ratings. About half of people considered "Value for money" currently to be "Poor" or "Very poor", and three-fifths considered the current "Range of supermarket operators to choose from" to be "Poor" or worse, with almost a quarter rating it to be "Very poor".

Figure 2.1 How do you rate the current food shopping in the Island?

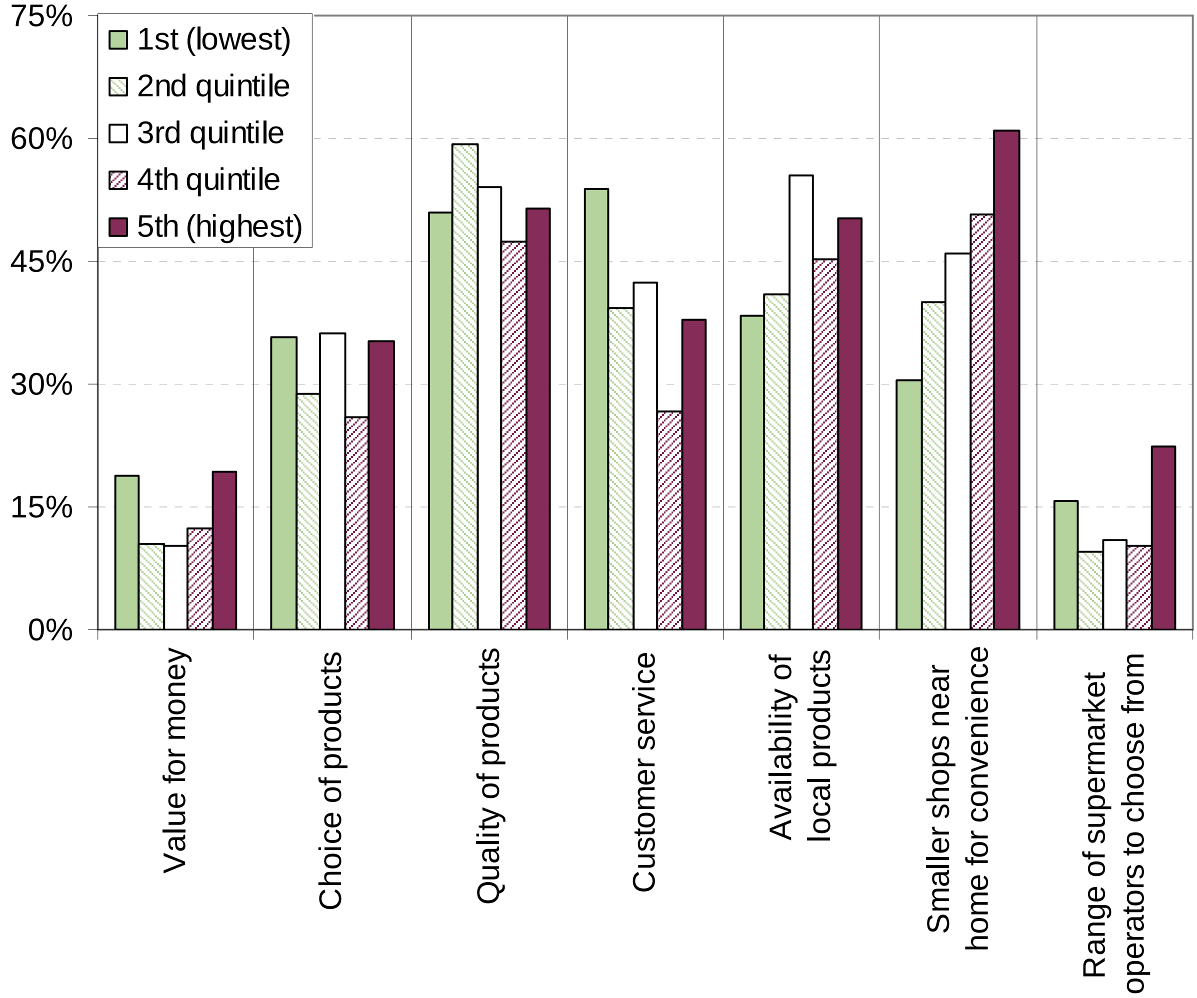


Looking at only the positive scores (i.e. focussing on the "Very good" and "Good"), and analysing **by equivilised income quintile,** showed some trends in people's opinions, as shown in Figure 2.2:

- those in the highest and lowest income quintiles were *most* positive about "Value for money" in the Island compared to those in the middle income quintiles, although only one-fifth (19%) of the highest and lowest income groups rated value for money as “Good” or better.

- those in the <u>highest</u> and <u>lowest</u> income quintiles were *most* positive about the “Range of supermarket operators to choose from”, although again only one-fifth of the top and bottom income quintiles responded positively.
- People in higher income households were more positive about “Smaller shops near their home for convenience” in the Island compared with those in lower income households.

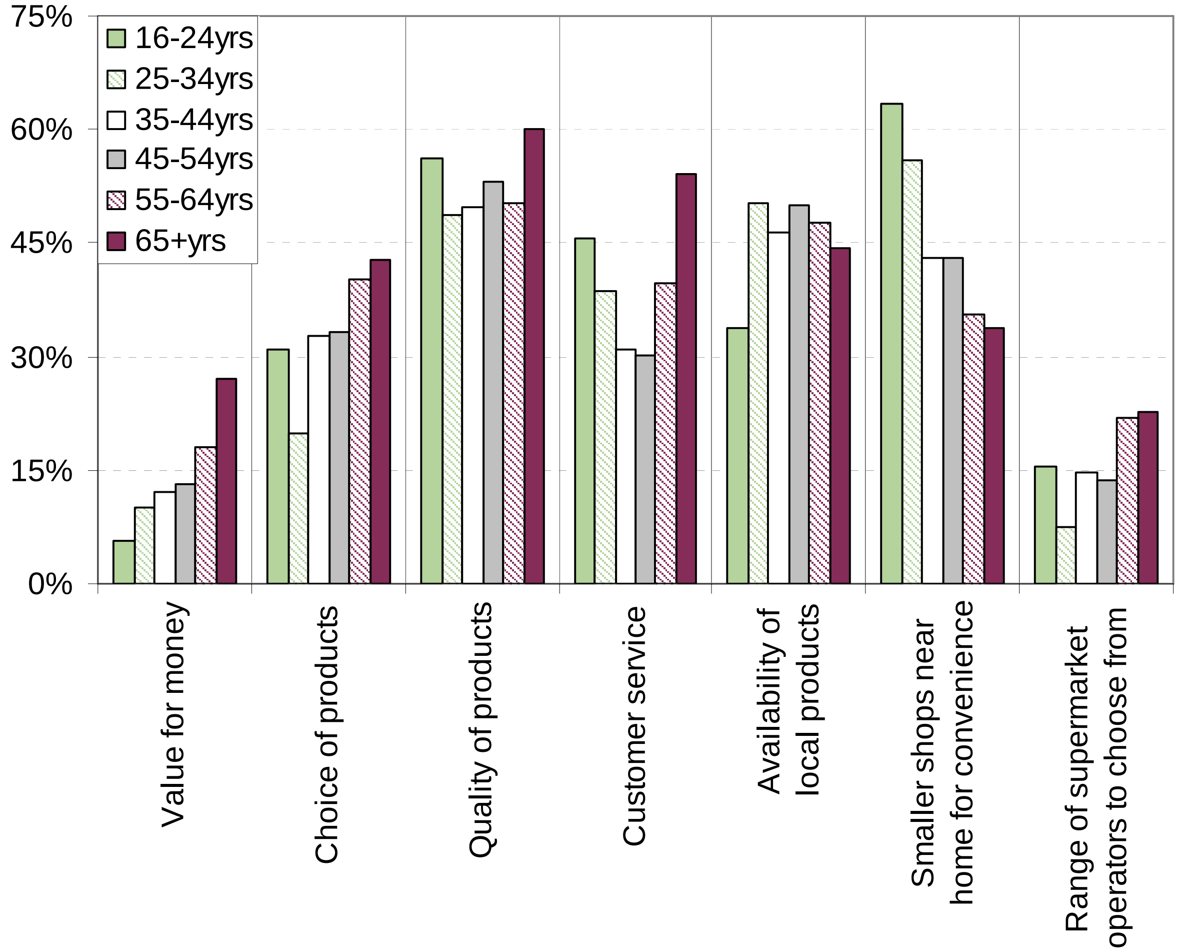
<u>Figure 2.2 How do you rate current food shopping in Jersey? (Percentage of people who rated each aspect as “Good” or “Very good”, by **income quintile**)</u>



Trends in opinions were also noted when the data was analysed **by age** (see Figure 2.3):

- as age-group increased, people tended to be more positive about “Value for money” in Jersey, about a quarter (27%) of those aged 65 years and over rating it as “Good” or better, compared with around one in ten or less of those aged under 55 years.
- younger age-groups were more positive about “Smaller shops near home for convenience”, with nearly two-thirds (63%) of those under 25 years, compared to around a third (35%) of those aged 55 years and over, rating this aspect of food shopping as “Good” or better in the Island.

Figure 2.3 How do you rate current food shopping in Jersey? (Percentage of people who rated each aspect as “Good” or “Very good”, **by age**)



Section 3: Attitudes towards having a third supermarket operator in Jersey

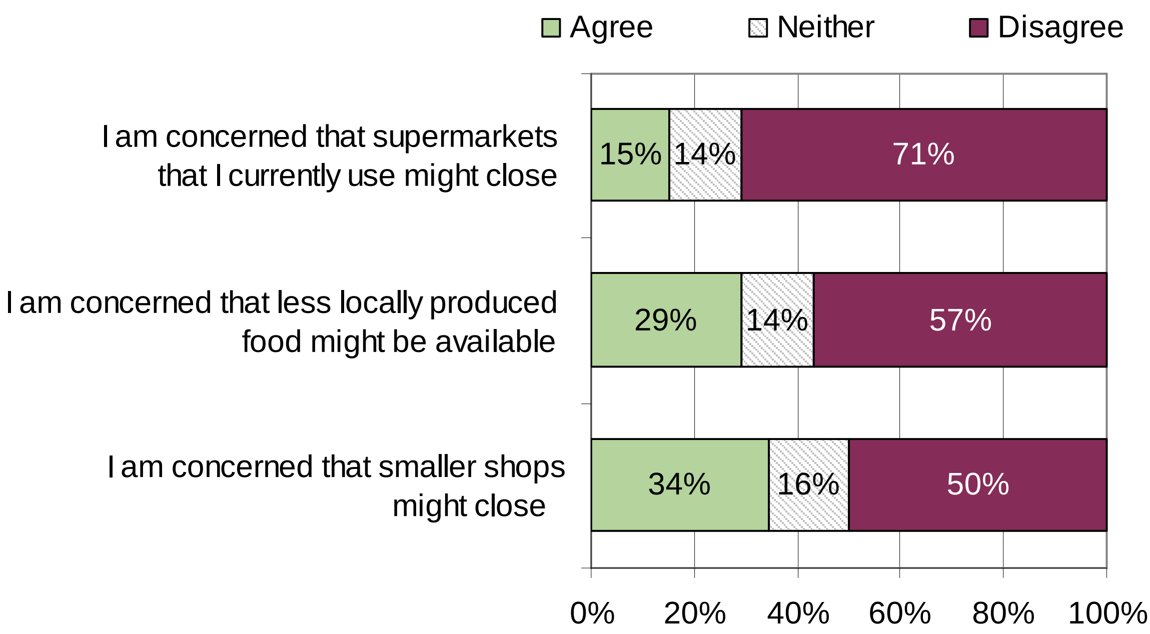
Jersey currently has two supermarket operators in the Island. Having explored people's opinions on what factors are important in their food shopping, and on the current status of these factors in Jersey, the survey questionnaire went on to ascertain respondents' attitudes to having a third supermarket operator, both in terms of concerns that this might raise as well as improvements it might bring. The results to these questions are shown in Figures 3.1 and 3.2.

About seven out of ten people (69%) said that they were *not* happy with the current range of supermarket operators. A fifth (21%) said that they *were* happy with the current range of supermarket operators, whilst the remaining 10% were neutral on this topic.

Around a third were concerned that smaller shops might close (34%) or that less locally produced food might be available (29%) if Jersey has a third supermarket operator.

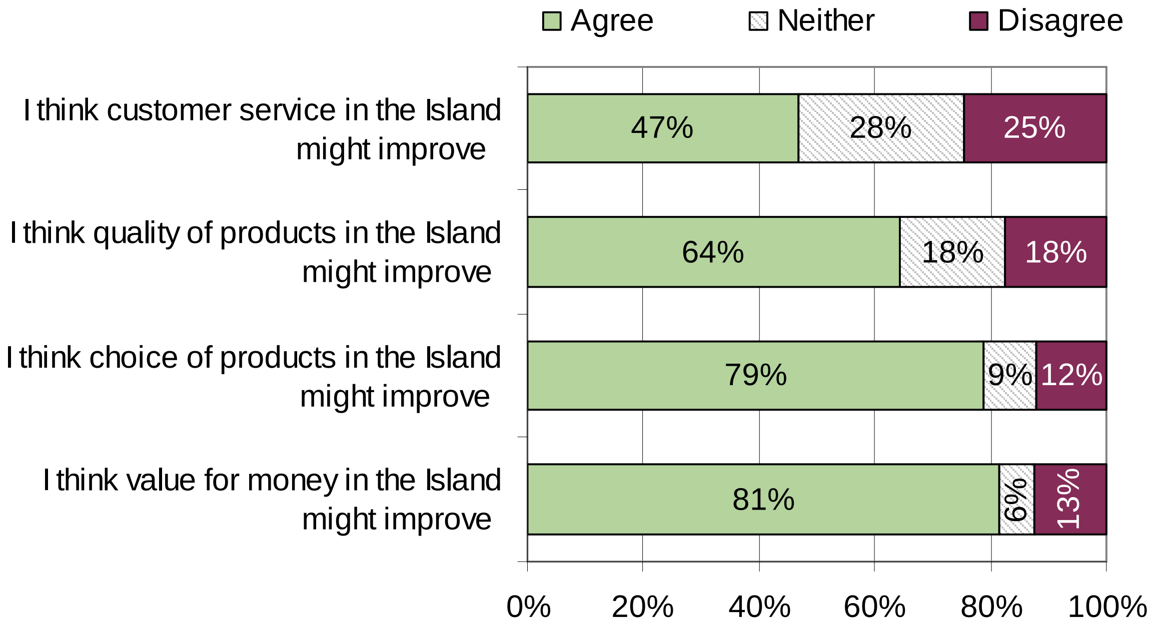
Nearly three-quarters of Islanders (71%) were *not* concerned that a supermarket they currently use might close if Jersey has a third supermarket operator, and around one in six (15%) *were* concerned that a supermarket they currently use might close.

Figure 3.1 Do you agree or disagree with the following statements about food shopping in Jersey, if Jersey has a third supermarket operator?



As Figure 3.2 shows four-fifths of people (81%) believe that value for money in the Island might improve if Jersey has a third supermarket operator. Only one in twenty (6%) were neutral on this point. A similar proportion (79%) think that choice of products in the Island might improve, whilst nearly two-thirds (64%) think that quality of products might improve if Jersey has a third supermarket operator. A quarter (25%) did not think that a third supermarket operator would improve customer service on the Island.

Figure 3.2 Do you agree or disagree with the following statements about food shopping in Jersey, if Jersey has a third supermarket operator?



When asked if they were in favour of having a third supermarket operator in Jersey, **overall, more than eight out of ten people (84%) responded that they were in favour**. There is no significant difference in the proportion being in favour between men and women, or between different tenure categories (for example owner-occupiers compared with States, Parish or housing trust rent, or non-qualified accommodation).

By **age,** the only age-group with a significantly different proportion is for those aged 65 years and over, of whom 72% are in favour of having a third supermarket operator in Jersey. For other age-groups, the proportion in favour ranged from 77% (55–64 year olds) to 93% (25–34 year olds).

By **income**, those in the highest income bracket (top quintile) were the least likely to be in favour, with three-quarters (74%) of those with the highest equivilised income being in favour of having a third supermarket operator in Jersey, compared with around 90% of those in the middle income quintiles.

It is interesting to investigate the difference in responses to the earlier questions in the survey, according to whether the respondent was in favour or not of having a third supermarket. *Both* those people who were and those who weren't in favour considered "Value for money" and "Quality of products" as the top two most important factors with regards to food shopping in the Island.

However, those who were in favour chose "Choice of products" and "Range of supermarket operators to choose from" to be the third and fourth most important factors, for those who were *not* in favour, "Availability of locally produced food" and "Choice of products" were the third and fourth most important factors respectively.

Table 3.1 illustrates the different rankings of factors according to whether or not the respondent was in favour of having a third supermarket operator in Jersey.

Table 3.1 Order of importance of factors when food shopping in Jersey, by whether or not the respondent was in favour of having a third supermarket operator in Jersey (1 = most important factor, across people in that category)

	Are you in favour of having a third supermarket operator in Jersey?	
	Yes	No
Value for money	1	2
Quality of products	2	1
Choice of products	3	4
Range of supermarket operators to choose from	4	8
Availability of locally produced food	5	3
Customer service	6	6
Smaller shops near home for convenience	7	5
Other	8	7

With regards to opinions on current food shopping in Jersey, it was found that those who were *not* in favour of having a third supermarket operator in Jersey tended to be more positive about each aspect of food shopping in Jersey than those who *were* in favour. Table 3.2 illustrates this.

Whilst just under half (47%) of those *not* in favour of having a third supermarket operator felt that "Value for money" was currently "Good" or better in Jersey, fewer than one in ten (8%) of those in favour felt the same. Two-thirds (63%) of those *not* in favour of having a third supermarket operator were positive about the current range of supermarket operators in the Island, whilst the remaining third (36%) felt that this was "Adequate".

Table 3.2 Percentage of people who rate aspects of current food shopping in the Island as "Good" or better, cross-analysed by whether or not the respondent was in favour of having a third supermarket operator in the Island.

	Percentage who responded the following aspects of food shopping are "Good" or better in Jersey currently	
	In favour	Not in favour
Range of supermarket operators to choose from	7	63
Value for money	8	47
Choice of products	26	71
Customer service	35	59
Availability of locally produced food	44	56
Smaller shops near home for convenience	45	53
Quality of products	47	82

As Table 3.3 shows, those *not* in favour of having a third supermarket operator are more likely to be concerned that supermarkets which they currently use might close. More than half (56%) of those not in favour are concerned that this might happen, compared with fewer than one in ten (8%) of those who *are* in favour.

Higher proportions - four-fifths (82%) - of those who are *not* in favour of having a third supermarket are worried that less locally produced food might be available, and 89% that smaller shops might close if Jersey has a third supermarket operator.

Whilst nine out of ten of those in favour of Jersey having a third supermarket operator think that value for money (93%) and choice of products (90%) in the Island might improve, around one in five of those *not* in favour believe this might be the case (16% and 21% respectively). However, a significant number of those *not* in favour decided to remain neutral on these points, with around a quarter choosing to *neither* agree nor disagree (24% and 26% respectively).

There was a similarly high proportion of people *not* in favour of a third supermarket operator who chose to remain neutral when asked if they thought quality of products or customer service might improve with a third supermarket operator (28% and 31% respectively chose "neither" disagree or agree on these statements).

Finally, three-quarters (75%) of those in favour of a third supermarket thought that the quality of products in the Island might improve with a third operator, whilst fewer than one in ten (8%) of those *not* in favour agreed. Around half (55%) of those in favour felt that customer service would improve, compared to fewer than one in ten (7%) of those *not* in favour. Table 3.3 summarises the responses to this question, by whether or not the respondent was in favour of a third supermarket operator in Jersey.

Table 3.3 Do you agree or disagree with the following statements about food shopping in Jersey – by whether or not respondent is in favour of having a third supermarket operator

	A third supermarket operator in Jersey?	Agree	Disagree	Neither
I am happy with the current range of supermarket operators	In favour	8	82	10
	Not in favour	92	1	7
I am concerned that supermarkets that I currently use might close	In favour	8	79	13
	Not in favour	56	27	17
I am concerned that less locally produced food might be available	In favour	20	65	15
	Not in favour	82	12	6
I am concerned that smaller shops might close	In favour	24	58	18
	Not in favour	89	7	4
I think value for money in the Island might improve	In favour	93	4	3
	Not in favour	16	60	24
I think choice of products in the Island might improve	In favour	90	5	5
	Not in favour	21	52	26
I think quality of products in the Island might improve	In favour	75	9	16
	Not in favour	8	65	28
I think customer service in the Island might improve	In favour	55	17	28
	Not in favour	7	62	31

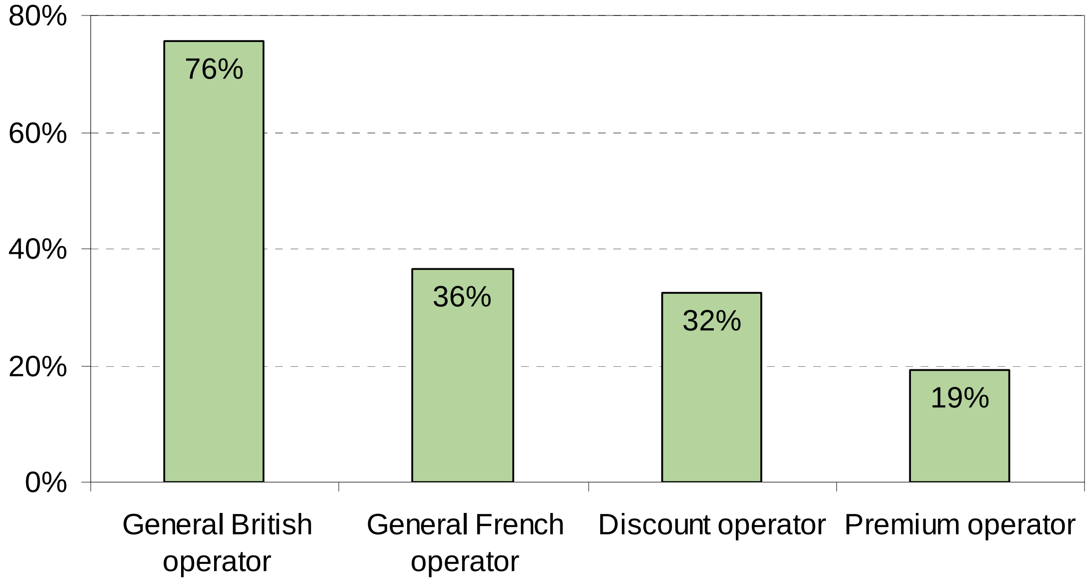
Which supermarket?

For those respondents who *were* in favour of having a third supermarket operator in Jersey, a final question asked which type of operator they would prefer. **Respondents were able to tick more than one choice**, and were given the options of:

- a premium operator (such as Waitrose)
- a general British operator (such as Asda, Morrison's, Sainsbury's or Tesco)
- a general French operator (such as Carrefour or Super U)
- a discount operator (such as Aldi, Lidl or Netto).

Figure 3.3 shows the proportion of those people in favour of a third supermarket who would like each type of operator.

Figure 3.3 (For those in favour of a third supermarket) Proportion of people who would like each type of operator
(Respondents were able to tick more than one option, so these do not sum to 100%)



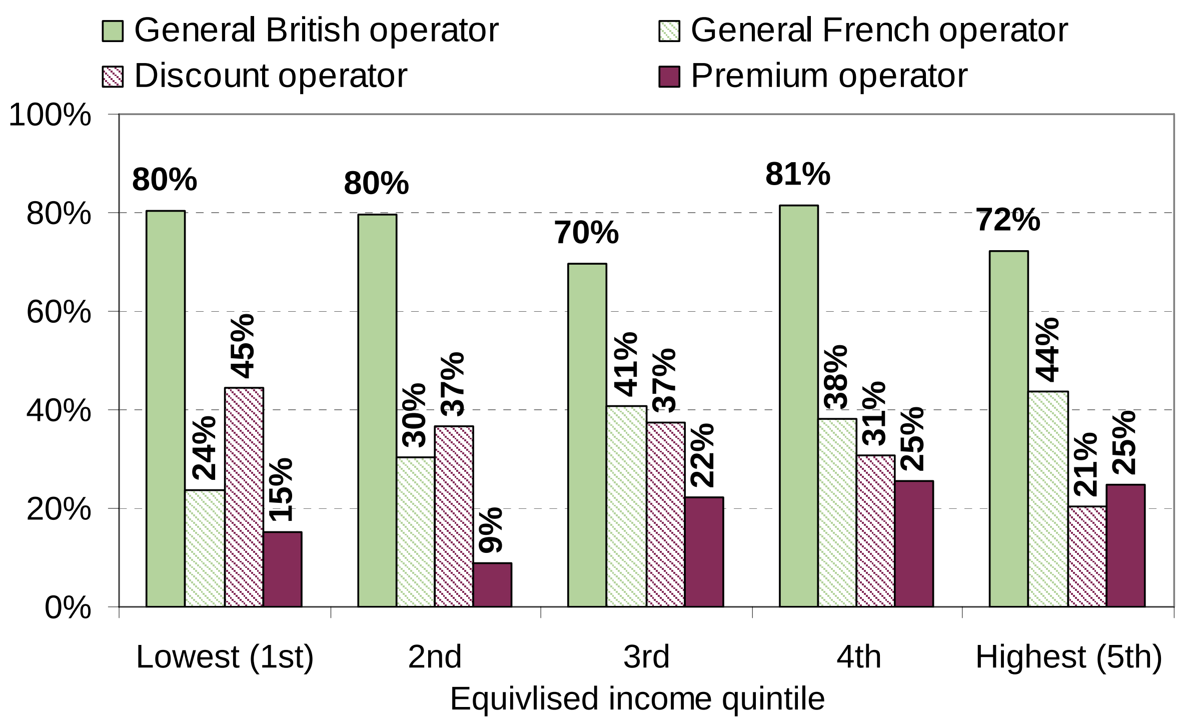
As can be seen in Figure 3.3, twice as many of the respondents to this question would like a general British operator (76%) compared with the proportions who would like a general French operator (36%) or a discount operator (33%). One in five (19%) would like a premium operator.

A general British operator was the most frequently chosen preferred type of supermarket for all **age-groups**.

Analysing the responses to this question by equivilised **income** quintile showed that again a general British operator was the most preferred type for every income band.

There was a trend towards discount operators being more frequently chosen as a preferred type of supermarket as equivilised income reduced. However, whilst just under half (45%) of responses from the lowest income quintile were for a discount operator, four-fifths (80%) would like a general British operator. Having a premium operator was the least preferred choice for all income bands (see Figure 3.4).

Figure 3.4 What additional type of supermarket operator would you like to have in Jersey (by equivilised income quintile)
(For those in favour of a third supermarket operator in Jersey)



Additional comments

Additional comments were invited in the survey in an open response section, and about two-fifths of respondents took this opportunity. Comments were analysed and grouped according to their theme. A quarter of those writing additional comments (24%) commented positively about adding more competition to the Island, whilst a fifth (20%) re-iterated their opinion Jersey needs a third supermarket. About one in eight (13%) expressed that a third supermarket should be introduced soon. A sixth (16%) expressed concern over current prices in the supermarkets.

There were fewer comments added in this section regarding concerns, with 3% of those choosing to write extra comments expressing concern over where in the Island the supermarket would operate from. One in ten (9%) re-iterated that Jersey does not need a third supermarket, or that they were concerned about local shops (4%).

Summary

The survey aimed to provide a robust measure of the attitudes and opinions of Jersey residents towards food shopping in the Island. The large random postal survey received an extremely high response rate of 60%. The results and inferences drawn can be considered to be representative of the full Island adult population.

GENERAL ATTITUDES TO FOOD SHOPPING:

- The majority of Islanders feel that “Value for money”, followed by “Quality of products” followed by “Choice of products” are, *in that order*, the three most important factors with regards to food shopping in the Island;
- This was true for all age-groups and equivilised income groups.

OPINIONS ON CURRENT SITUATION IN JERSEY:

- Nearly half of residents (47%) felt that “Value for money” in the Island was “Poor” or “Very poor”;
- Nearly two-thirds (62%) thought the “Range of supermarket operators” was “Poor” or “Very poor”;
- Nine out of ten (90%) felt that the current “Quality of products” was adequate or better, with half (52%) considering quality to be “Good” or “Very good”;
- Half of people (48%) feel that “Choice of products” is “Adequate” in Jersey, a quarter (27%) that it was “Good”, and 5% that it was “Very good”.

ATTITUDES TOWARDS HAVING A THIRD SUPERMARKET OPERATOR:

- One-fifth of Islanders (21%) are happy with the current range of supermarket operators, whilst 69% indicated they were not;
- Four-fifths think that having a third supermarket operator might improve value for money (81%) and choice of products (79%) in the Island; two-thirds (64%) think that a third supermarket operator might improve the quality of products in the Island;
- A third of people (34%) expressed concern that smaller shops might close with the arrival of a third supermarket operator – half (50%) said they were *not* concerned about this issue;
- A similar proportion (29%) *were* concerned that less locally produced food might be available in these circumstances, whilst over half (57%) were *not* concerned about this issue;
- Seven out of ten Islanders (71%) were *not* concerned that current supermarkets might close if a third supermarket were to operate in Jersey, whilst a sixth (15%) *were* concerned.

Overall, more than four-fifths (84%) of residents were in favour of Jersey having a third supermarket operator.

By far the most preferred type was a general British operator. This type was the preferred choice for all age-groups and equivilised income bands.

Appendix I

Survey Methodology & Response Rates

Over two thousand households were sampled at random. These randomly selected households received a survey form through the post and were asked that the person in the household who had the next birthday (and who was aged 16 years or over), fill it in and post it back to the Statistics Unit. A reminder form was sent out after two weeks to those households who had not yet responded, to ensure all those who wanted to take part were able to. The questionnaire is reproduced on pages 19 and 20 of this report.

This method of sampling ensured that the survey **randomly** sampled the adult population of Jersey[3].

The survey achieved an **extremely high response rate**, with **60%** of sampled households filling in and returning the survey form. Such a high response rate, together with the method of sampling, ensures the sample results are both accurate and representative of the full adult Island population.

Weighting

Even with an extremely high response rate of 60%, statistical theory can be applied to further improve the representativeness and accuracy of the survey. Comparing the characteristics of respondents (such as age, gender and tenure) with those of the full Island adult population showed a slight under-representation of certain sub-groups, as there are particular sub-groups who were more or less responsive, as is normally found in postal surveys of this kind.

Table A1 compares the proportion of respondents with that of the Census data, and shows that there is an under-representation particularly of the younger age-groups. From this comparison and also comparing the proportions of respondents with regards to their gender and tenure, it is possible to assign each respondent a weight. For example, those in the younger age-groups would be given a slightly higher weight than those in older age-groups, to compensate for their slight under-representation in the responses received. In fact, the data was weighted across a three-dimensional tabulation of age, gender and tenure to produce an extremely representative dataset.

Table A1 Age profile (percentages) of unweighted survey respondents with Census data

Age	Unweighted survey respondents	Census 2001
16 – 24 yrs	2	13
25 – 34 yrs	10	19
35 – 44 yrs	22	21
45 – 54 yrs	21	17
55 – 64 yrs	20	13
65+ years	25	17

Table A2 provides the weighted responses by age, gender and tenure, and shows how these are now much closer to the Census proportions, illustrating how the weighting procedure

[3] NB the survey and this report focuses on residents aged 16 years and over

ensures that the respondent data appropriately represents sub-groups of the population with respect to age, gender and tenure, such that no group is under-represented in the results.

Table A2 Profiles of weighted survey respondents (percentages) compared with Census data

Age	Weighted survey respondents	Census 2001
16 – 24 yrs	12	13
25 – 34 yrs	19	19
35 – 44 yrs	21	21
45 – 54 yrs	18	17
55 – 64 yrs	13	13
65+ years	17	17
Gender		
Men	49	48
Women	51	52
Tenure		
Owner-occupied	58	51
States / Parish / Housing trust rent	13	14
Qualified Private rent	19	22
Non-qualified accommodation	11	13

Comparison of weighted and unweighted analysis results shows that the weighting procedure, whilst improving the representativeness of the data itself, does not significantly alter the key findings of the analysis in this report, which can therefore be considered to be robust.

Equivilisation

The survey asked respondents for their total annual household income, so that the findings of the survey could be analysed by income to see, for example, if those with lower incomes had different views to those with higher incomes.

Comparing simply by household income without taking into account the size of the household would not be appropriate, as a household with a single adult earning £45k to £55k cannot be described as having an equivalent income to a household with two adults and three children having a total income of £45k to £55k.

Equivilisation is the process by which household incomes are standardised to account for the size and make-up of the household. The modified OECD equivilisation scales were used to transform household income into equivilised household income values. The ordered equivilised income distribution was then divided into five bands of 20%, and each respondent's data could then be attributed to the 1st (lowest) equivilised income quintile, 2nd, 3rd, 4th or the 5th (highest) equivilised income quintile, as appropriate according to their household income and household size and make-up.

Sampling errors

The survey was designed as a large random sample of Jersey residents. This sampling methodology enables us to calculate confidence intervals for the results (proportions) of the analysis, and presented in this report.

Using sampling theory, and under the sampling design implemented (simple random sampling without replacement[4]) the standard error on the estimate of a population proportion p is:

$$s.e.(p) = \sqrt{\frac{p(1-p)(1-f)}{(n-1)}}$$

Where:

n is the total number of respondents.

f is the sampling fraction, equal to $\frac{n}{N}$, where N is the number of households in the Island.

The 95 percent confidence interval on any proportion p is then given by:
$p \pm 1.96 s.e.(p)$ and attains a maximum for $p = 0.5$, i.e. 50%.

Using these formulae, the statistical uncertainty on results in this report which refer to the full population is ± 2.7 percentage points.

This means that for a question which gives a result of 50%, the 95 percent confidence interval is 47.3% to 52.7%. Rounding to zero decimal places, the result can be more simply considered as 50 ± 3%. This reduces to ± 2% for proportions of 80%.

Put another way, we can be 95% confident that a result published for the overall population is within ± 3% of the true population figure.

For sub-samples of the population, e.g. by age-band, the sampling fractions within each sub-category will vary. The above formula still applies, and gives the following maximum confidence intervals for proportions (expressed as a range of percentage points) to be assigned to published results:

- Age-band: between ±5% (age 65+ years) and ±20% (age 16– 24yrs).
- Gender: ± 3% (females); ± 5% (males)
- Income: ± 6% for each quintile

[4] Strictly speaking the sampling design incorporated stratification by Parish, with proportional allocation to the strata. The full estimated variance calculation under this design produces confidence intervals which are the same as those reported in this appendix (derived using the simpler formalism) within the accuracy of percentage point ranges quoted to zero decimal places.

A Third Supermarket Operator in Jersey?

1. How important to you are the following with regards to food shopping in the Island?

Please tick one circle on each row	Very important	Fairly important	Not very important	Not at all important
A. Value for money	01 ○	02 ○	03 ○	04 ○
B. Choice of products	01 ○	02 ○	03 ○	04 ○
C. Quality of products	01 ○	02 ○	03 ○	04 ○
D. Customer service	01 ○	02 ○	03 ○	04 ○
E. Availability of locally produced food	01 ○	02 ○	03 ○	04 ○
F. Smaller shops near my home for convenience	01 ○	02 ○	03 ○	04 ○
G. Range of supermarket operators to choose from	01 ○	02 ○	03 ○	04 ○
H. Other *(please specify)*____________	01 ○	02 ○	03 ○	04 ○

1b. Which three of the above are the most important to you?

Please write your choice of letters (A to H) from the table above:

☐ = Most important to me

☐ = Second most important to me

☐ = Third most important to me

2. How do you rate *current* food shopping in the Island in terms of:

Please tick one circle on each row	Very Good	Good	Adequate	Poor	Very Poor
a) Value for money	01 ○	02 ○	03 ○	04 ○	05 ○
b) Choice of products	01 ○	02 ○	03 ○	04 ○	05 ○
c) Quality of products	01 ○	02 ○	03 ○	04 ○	05 ○
d) Customer service	01 ○	02 ○	03 ○	04 ○	05 ○
e) Availability of locally produced food	01 ○	02 ○	03 ○	04 ○	05 ○
f) Smaller shops near your home for convenience	01 ○	02 ○	03 ○	04 ○	05 ○
g) Range of supermarket operators to choose from	01 ○	02 ○	03 ○	04 ○	05 ○

Jersey currently has two supermarket operators.

3. Do you agree or disagree with the following statements about food shopping in Jersey?

Please tick one circle on each row	Agree	Disagree	Neither
I am happy with the current range of supermarket operators	01 ○	02 ○	03 ○
If Jersey has a third supermarket operator…	**Agree**	**Disagree**	**Neither**
…I am concerned that smaller shops might close	01 ○	02 ○	03 ○
…I am concerned that supermarkets that I currently use might close	01 ○	02 ○	03 ○
…I am concerned that less locally produced food might be available	01 ○	02 ○	03 ○
... I think value for money in the Island might improve	01 ○	02 ○	03 ○
…I think choice of products in the Island might improve	01 ○	02 ○	03 ○
…I think quality of products in the Island might improve	01 ○	02 ○	03 ○
…I think customer service in the Island might improve	01 ○	02 ○	03 ○

4. Are you in favour of having a <u>third</u> supermarket operator in Jersey?

01 ○ Yes

02 ○ No

4b. If you answered YES, what additional *type* of supermarket operator would you like to have in Jersey? *(Please tick all that apply)*

☐ Premium operator *(e.g.Waitrose)*

☐ General operator (British - e.g. *Asda, Morrison's, Sainsbury's, Tesco)*

☐ General operator (French - e.g. *Carrefour or Super U*)

☐ Discount operator *(e.g. Aldi, Lidl, Netto)*

The following questions will enable us to make sure that our survey represents the views of <u>all</u> Jersey residents.

5. Are you? *(Please tick one circle only)*

01 ○ Male 02 ○ Female

6. What age group are you? *(Please tick one circle only)*

01 ○ 16 – 24 years

02 ○ 25 – 34 years

03 ○ 35 – 44 years

04 ○ 45 – 54 years

05 ○ 55 – 64 years

06 ○ 65 years and above

7. <u>Including yourself</u>, how many people live in your household *(excluding any lodgers)***?**

☐ Adults (18 years and older)

☐ Young adults (aged 16 or 17 years)

☐ Children (aged 14 or 15 years)

☐ Younger children (aged 13 years or younger)

8. What type of accommodation do you live in? *(Please tick one circle only)*

01 ○ Owner-occupied

02 ○ States or Parish rent

03 ○ Housing Trust rent

04 ○ Qualified Private rent

05 ○ Sheltered or disabled housing

06 ○ Staff or service accommodation

07 ○ Lodger in private household

08 ○ Registered lodging house

09 ○ Other Non-qualified accommodation

9. Approximately, what is your HOUSEHOLD'S TOTAL annual income?

01 ○ less than £15,000

02 ○ £15,000 - £24,999

03 ○ £25,000 - £34,999

04 ○ £35,000 - £44,999

05 ○ £45,000 - £54,999

06 ○ £55,000 - £64,999

07 ○ £65,000 - £74,999

08 ○ £75,000 - £84,999

09 ○ £85,000 - £94,999

10 ○ £95,000 or more

10. Do you have any lodgers in your household? YES / NO

11. Do you have any other comments about Jersey having a third supermarket operator?

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Thank-you for taking the time to complete this survey - <u>every</u> response is important to us.
Please post this form back in the enclosed pre-paid envelope, or freepost to: Business Reply Service, Licence No JE65, Statistics Unit, PO Box 140, St. Helier, JE1 1AE.

This reference number is ONLY used for our filing system, and not in any analysis: X000X