



## Submarine Christmas Retail Survey 2009

### Sample

The survey sample for 2009 is similar to the previous years' surveys. Conducted to Submarine's data base of 2000 email addresses of whom, in 2009, there were 398 responses. Submarine does not claim this survey to be a truly accurate demographic profile of Guernsey residents. However we can safely assume that the respondents will be office workers between the ages of 25 to 60.

### Commentary:

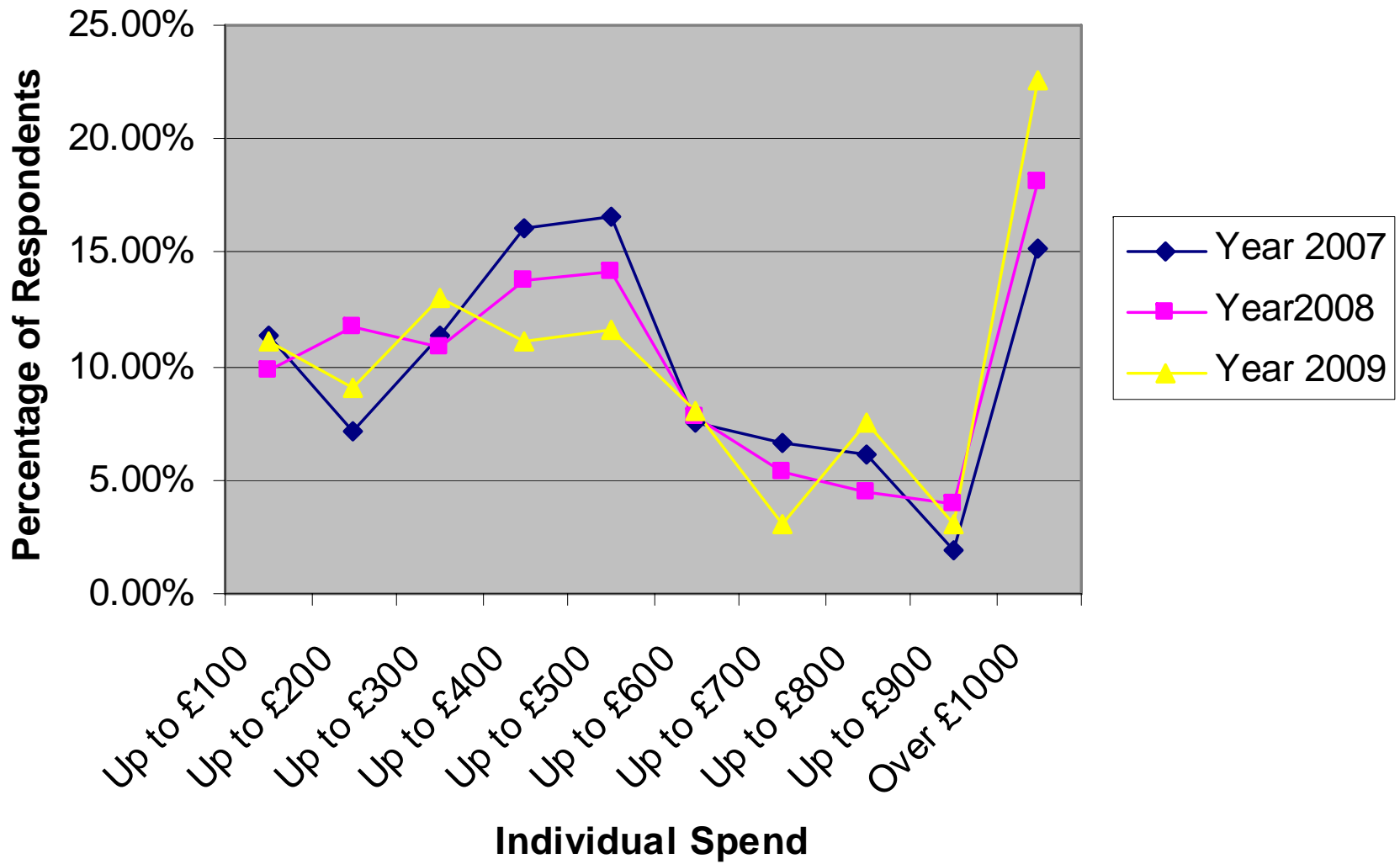
Laying the 3 years' results over each other in a graph format the following conclusions might be drawn:

- In the £300-£600 spending bracket there may be a reduction in gift spending
- Year on year those spending over £1000 has risen
- The percentage of people buying **all** of their purchase online or off island has risen
- The percentage of people buying **some** of their purchases online has risen

There has been a continued shift towards to off island purchases over the last three years and we would assume that that is set to continue. 2009 does not appear to show any massive shifts in any particular direction; just a slow and predicted migration.

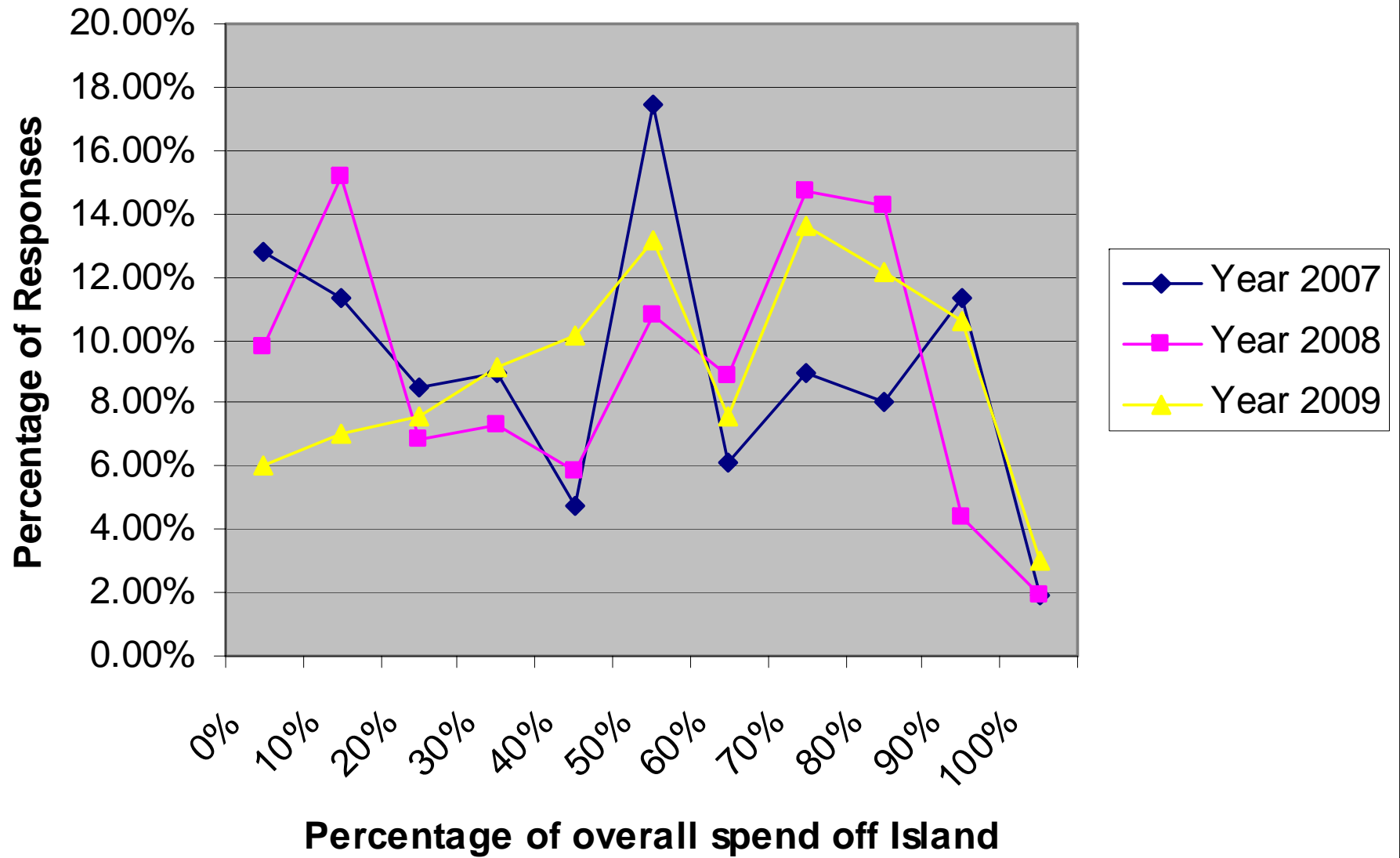
What was your individual spend on Christmas gifts

Response	2007	2008	2009
Up to £100	11.37%	9.80%	11.06 %
Up to £200	7.11%	11.76%	9.05 %
Up to £300	11.37%	10.78%	13.07 %
Up to £400	16.11%	13.73%	11.06 %
Up to £500	16.59%	14.22%	11.56 %
Up to £600	7.58%	7.84%	8.04 %
Up to £700	6.64%	5.39%	3.02 %
Up to £800	6.16%	4.41%	7.54 %
Up to £900	1.90%	3.92%	3.02 %
Over £1000	15.17%	18.14%	22.61 %






























What percentage of your Christmas spend was made either off island or online?














Response	2007	2008	2009
0%	12.74%	9.80%	6.06 %
10%	11.32%	15.20%	7.07 %
20%	8.49%	6.86%	7.58 %
30%	8.96%	7.35%	9.09 %
40%	4.72%	5.88%	10.10 %
50%	17.45%	10.78%	13.13 %
60%	6.13%	8.82%	7.58 %
70%	8.96%	14.71%	13.64 %
80%	8.02%	14.22%	12.12 %
90%	11.32%	4.41%	10.61 %
100%	1.89%	1.96%	3.03 %











**Feel free to make any additional comments (2009 Comments)**

View	Response
	Spent more online this year than last
	I love Christmas
	The things I buy are not available in Guernsey
	This is estimated as all presents not yet bought.
	Shopping online makes things so much easier and cheaper..
	Virtually housebound so have little alternative than to spend on mail order and internet. However I try to support local industry as much as possible.
	I don't mind spending locally if the business can explain to me the benefits of doing so. Recently I bought a TV online (from Jersey ironically, play.com) and called Homemaker locally to see if they could compete. They couldn't (£1630 vs. £1275) when I asked what the benefit was of buying locally I was told 'we have technicians in a workshop'. In the current climate I would have expected a little more passion and selling involved. This attitude contributes massively to my 80% online, non-local spend.
	better value and better service off island with a more positive attitude to our current climate, willing to go out of there way to help, shops here could try much harder to keep the pound on guernsey, sad really ..
	I hate shopping in town. I will buy unique gifts from out of town shops like mondomundi which have something different, but will get other things online.
	When I bus to town I am limited to what i can carry, so I went by car yesterday after work. Couldn't park anywhere other than a 30min space so bought one large item, then came home and shopped on the net. The rest of my shopping will be done at out of town shops.
	Guernsey retailers continue to shoot themselves in the foot. I saved literally £100s by shopping online. It's not just the price but the selection also. I doubt we'll be using any local stores within the next couple of years.
	Easier and cheaper to buy online. Tried to go into town yesterday and circled trying to find a parking space for over half and hour, gave up and bought from Amazon instead. Delivered straight to house, VAT free and often the next day and always cheaper. I would love to support town, but it just does not make sense given how easy it is to get it online. Sort out the parking.
	My daughter tells me HMV shop products are more expensive than buying them online. Presumably not passing on the VAT saving to local shoppers in their store (Like creaseys food products).....interesting...are they deliberaately trying to steer people away fromt the shop?

	It would be interesting to extend this survey to include amount spent on food and what percentage was purchased online/off island.
	its simply economics. Whilst i buy my groceries as local as possible and other items, I find the choice and hassle of town limiting and the internet much easier and cheaper.
	As much as I'd love to support local shops there's still too great a price difference between local and online. Couple that with the attitude of some of the sales staff and it doesn't make for an appealing proposition....
	We keep being exhorted to spend on Island, after my experience with a particular local furniture retail outlet in town this week I'm aiming to spend more of my money online. This particular store thought it acceptable that after advising me of a delivery time of seven weeks and that after thirteen weeks had elapsed and numerous promises broken my goods had still not arrived I had to dissuade them of the fact and then I had a battle to get my deposit refunded.
	P/c bits & pieces are so much cheaper from places like Dabs etc,Ive tried to buy local,either its not in stock,or 33 to 50% dearer.Most of the UK dealers will pay the freight or part off it.Locally its added on to the price.The Inks that I buy are 60% less than here.
	Companies like Topshop do not post to guernsey so have to buy on mainland. Never any sizes available in Guernsey so have to order a lot online, I usually try phoning around here first. Staff are much friendlier and helpful on the mainland.
	Usual story. More being spent online because of convenience, better choice and customer service and better prices than are being offered locally.
	I bought many of my presents in Jersey or online because the choice is better.
	
	Bike for 7yr old - at shops here £185 - £250, at Amazon £86 delivered to my door!!! I would love to be able to support and buy locally but with savings like that I just can't afford/justify it.
	Continual overpricing locally,combined with poor customer service means I will continuent to shop off island. Until the holier than thou attitude that prevails amongst shop staff, or the lack off proper English being spoken is rectified, I see no reason to support local retailers!
	at the moment we just dont seem to have as much choice as in previous years, M& S has less in the shop as has boots, leaves no choice but to go on line, UK retail is not good therefore prices are v. competitive even with postage
	Amazon be blessed
	My favourite shopping area is the Bridge with its easy parking and pleasant, small, customer friendly shops....long may it remain! I prefer to shop locally as it is good for our economy. I support the local Farmers Market and buy Fish, veg, cheese, vegetarian bakes, preserves and pickles, etc, from there. I shall order a lobster for Christmas from the fish stall at the market and almost all that I need is

	available from the other stalls.
	Online is becoming more and more efficient. Purchases made on four different online stores came up with exactly what we wanted and delivered within 3 days with savings of up to 25% on Guernsey prices. I would like to shop in Guernsey but in the current economic climate if you can't compete, forget it.
	It's so easy. Why don't more local shops offer online purchasing!
	I found the attitude in some of the shops very much improved and their service very good - e.g. Next, New Look, Guernsey Press. HMV and Valpy's were their usual excellent service. For a non Christmas gift - I went to B&Q for a carpet shampoo filter for a machine they sold and the 'boy' there told me to go 'on line'!
	That's a very short survey.
	If local shops would sell online I would happily pay the postage. I find shopping difficult and sometimes painful. St Peter Port only suits fit people.
	Town parking.....Impossible. Retail prices both in and out of town far too high and not as much choice. Town is dying due to lack of parking, excessive rents and large out of town superstores. Much smaller spend this year due to being subjected to ever higher taxes to replace 300 million lost due to bad government and Zero 10.
	The choice you get online is superior but also cheaper. You have the time to sit down in your home and shop the best prices. It arrives quickly in most cases without having to wrestle the crowds. Also the positioning of Creasy's toy and baby shop is not convenient and has really been missed in my case from Kids Kingdom on the bridge. Somewhere you could actually park outside of. Most things I buy are from Asos, e-bay and Amazon. Next catalogue is best for Kids clothes. There is no where to buy my little boy's clothes over here.
	Happy Christmas and a Healthy and prosperous New Year! Sandra
	I mostly give money so it is indirect spending
	We increasingly favour shopping on-line because it avoids impossible parking, traffic jams and appalling weather. It also offers greater choice of goods, competitive prices and ease of delivery.
	Making a concerted effort to buy on-island this year and have been surprised how much choice I have found in local shops. Local shops also seem to be much more competitive - some children's toys have actually been cheaper at Aladdins Cave than on Amazon. Very impressed!
	money given.
	After years of being robbed by local retailers it is so nice to be able to purchase goods at reasonable prices.

	conscious of need to support local shops, but online purchases packed and posted.
	I made online and off-island comparisons for the big spend items (cameras) first. Price and availability were the main criteria when choosing items online. "We don't stock that" is a killer line for local retail.
	When doing my shopping in St. Peter Port there were two occasions when islanders were just looking at prices and then going off to check on line (I heard them discussing this). I think we all have a responsibility to support our island shops. Often buying off island can be a false economy.
	There is a lack of affordable clothing and gift shops in the town. We need a BHS not another M&S!
	Guernsey businesses should be more above board and take off the full VAT. We shop in the UK or online for most things even furniture, kitchens, bathrooms etc as we get them cheaper than Guernsey prices PLUS they take off the VAT or you can claim it back. Creaseys is a good example of unfair trading, an example being that this year they did not do the buy two get one free on gifts, paper etc which was done in the UK M & S so I bought mine in UK and have boycotted them. Freight is the excuse and this is rubbish as we have brought in a huge amount of goods for our new house with Condor Logistics and other freight companies and they are not overly expensive.
	Amazon is a quick and easy way to shop, the prices are more competitive than locally, they take the VAT off and deliver within 1 - 3 days.
	I tried to buy some items here but were sold out or unavailable and so had to buy on line.
	I have tried really hard to buy locally this year but it is not always possible when you have extensive savings through companies like Amazon. However, I have not shopped at all at M&S this year on the grounds that locally they are not supporting the 3 for 2 offers on gifts/chocolates/biscuits as they have done in previous years, yet in the UK these offers are still available. As a franchise I would have thought they would be benefitting from these offers on a purchase level but not passing it on to the customer - I may be wrong and I am happy to be corrected :-)