

Invest West Norfolk Consumer Insight Survey Findings Executive Summary

July 2020

Executive Summary

Overview

The Invest West Norfolk business insight survey took place online from Friday 26th June – Sunday 5th July. The purpose of the survey was to understand the impact of Covid-19 on consumers in west Norfolk, their concerns, and confidence in the future.

The survey ran concurrently with a business insight survey and priorities consultation with parish councils and members of the King's Lynn BID.

In total, 154 west Norfolk consumers took part in the survey.

The survey was promoted extensively via the borough council social media as well as in the local media. It was also shared via parish and town councils, and via Discover King's Lynn, maximising engagement in the survey.

Everyone completing the survey had the option of entering a prize draw to win one of three prizes of gift vouchers to the value of £50 for use in a west Norfolk business of their choice.

Key Themes

There are some key themes emerging throughout the findings:

- **Online** – unsurprisingly, there has been a recent uplift in online retail amongst consumers in the area, aligning with other similar local studies (Vision King's Lynn, June 2020). There is a suggestion that this is going to become of even greater importance, with many consumers indicating their online use will increase further.
- **Non-essential shopping** – the notable reduction of non-essential shopping generally, combined with the increase in online shopping, is likely to have an impact on the local economy. Less footfall, browsing, time in-store and impulse buying (in addition to the wider geographical reach of online) will mean smaller, local businesses will need to adapt
- **Consumer confidence** – although some are confident about returning to the shops, there is still a lack of confidence amongst a significant proportion.
- **Independents and shopping local** – there is a real desire to shop local and an interesting theme is around the appetite for shopping in independent shops and local convenience stores. This desire to support local businesses represents an opportunity.
- **Safety and reassurance** – the provision of safety measures is likely to enable a more confident return to town centre shops, pubs and restaurants. Visible interventions (e.g. hand sanitisers, social distancing measures, signs, pavement markers) are likely to have the greatest impact on perceptions of safety.

Key findings

- The vast majority of consumers in west Norfolk (80.5%) normally do their grocery shopping in the supermarket, with just over 1 in 10 opting for online.

- Online shopping is a significantly more popular channel for non-essential items such as clothes and gifts. 43.8% say they do most of their non-essential shopping online, which is equal to the number saying they use high street shops.
- Almost 1 in 10 (9.2%) use independent retailers for non-essential shopping (slightly higher than the 5.2% using independents for essentials/groceries).
- Town locations are preferred for shopping in west Norfolk (three quarters indicate towns as their preference), with King's Lynn being the most frequently mentioned:
 - King's Lynn is the preferred location for grocery shopping, with over a third of the responses (34.2%). Hunstanton and Downham Market follow as the next most popular centres.
 - King's Lynn is also by far the most preferred location for shopping generally, with over half the responses (56.6%) – again followed by Hunstanton and Downham Market
- The importance of online shopping for west Norfolk consumers is clear - 95% of consumers do at least some form of shopping online (most commonly, this is up to 25% of their shopping online). A quarter of west Norfolk consumers do more than half of their shopping online.
- Over half say 'more online shopping' has been one of the changes in shopping habits they have made as a result of Covid-19. Moreover, although almost two thirds (60.3%) feel their online shopping habits will remain the same in the future, it still looks likely to grow - 29.8% indicate they will be doing even more online shopping in the future but only 9.9% indicate they will be doing less (therefore a net increase overall of 19.9%)
- The biggest change to people's habits as a result of Covid-19 has been shopping less frequently, with almost two thirds stating this (63.4%). The purpose of shopping has also changed, with 54.2% saying they are now doing less non-essential shopping.
- One interesting theme emerging is around the use of independent shops and local convenience stores – there has been an increase of 26.8% in the use of each of these types of retailer.
- Over half of the participants – 55.6% - say they feel confident about returning to the shops as lockdown eases. However, and importantly, a significant proportion are still lacking confidence, with over a third (37.9%) saying they are not confident about returning to the shops and a further 6.5% indicating uncertainty.
- The key short-medium term measure that consumers would like to see, by some significant majority (69.8%) is:
 1. Hand sanitiser stations in high streets / neighbourhood shopping areas.

The other key priorities are:

2. Covid safe posters and signage.
 3. Pavement markings.
- Almost half the participants say they are intending to eat or drink out in the next three months. The remainder are almost equally divided between those who are not intending to (24.3%) and those who are uncertain at this point in time (28.3%).
 - A focus on protective measures in line with government guidelines would make it easier for many to return to pubs and restaurants – social distancing measures (70.0%), more outdoor

seating (59.3%) and protective measures for staff (57.3%) are the key mentions. As per the priorities for visiting the town centre in general, providing hand sanitiser remains a significant consideration, with over half (54.7%) mentioning this.

- Other changes to the way in which people access west Norfolk businesses generally, as a result of Covid-19, typically relate to more forward thinking - such as fewer visits with more planning, avoiding peak times and ordering either online or by telephone.
- The desire to support 'local' is clearly strong amongst west Norfolk consumers. 96% overall say it is important (60.1% extremely important and 35.9% saying it is somewhat important).