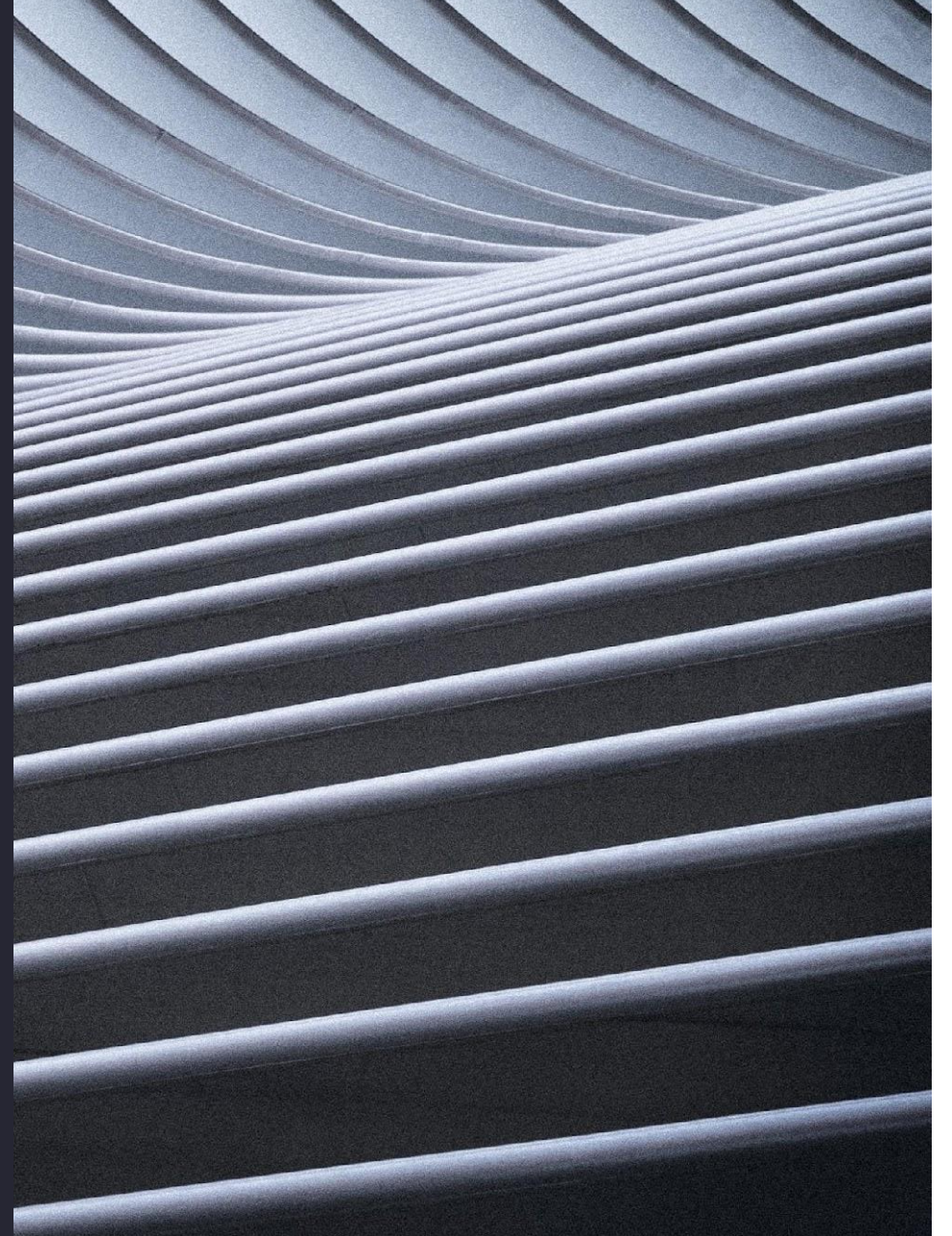


**4insight**

# **Waterfront Public Engagement Results Presentation**

January 2025



# Agenda

1. Objectives, Sample & Methodology
2. Research findings
  - Quantitative research
3. Executive Summary
4. Questions
5. Appendix



# About the Research

# Research Aim & Objectives

**The research aim** was to engage islanders and explore their views on the plans for the development of the Waterfront in an unbiased and independent manner.

**Outcome:** Launch islanders' engagement on the new Waterfront plans, support future planning applications and communication plans.

## Specific objectives included:

- explore islanders perceptions of the Waterfront plans including the landscaping, design, plot layout, scale, height and view lines, as well the planned accommodation
- explore islanders views on the inclusion of an outdoor 50m pool, an indoor pool and a cinema, as well the retention of Le Fregate cafe, plus other food and beverage outlets
- gather insight on islanders' perceptions on the plans for connectivity and accessibility from St Helier
- begin the engagement process with islanders, taking them on this journey from design to completion

# Project Scope & Sample

**Scope:** Islanders and visitors aged 16 and over

## **Sample:**

Survey questions were developed by 4insight and consulted on with the client prior to survey launch. The final question set included a number of socio-demographic questions used to ensure a representative coverage of islanders by age, parish, income level and ethnicity; incorporating socio-demographic questions also allows for any differences in perceptions between different islander sub-groups to be established.

The recruitment strategy was through:

- 4insight's online panel of over 5,400 representative islanders
- 4insight social and traditional media
- Street interviews (CAPI) on iPads at target locations
- JDC visits to schools e.g Hautlieu
- JDC press releases, advertising and extensive media activity including radio and social media

# Quantitative Methodology

A semi-structured questionnaire was designed to identify perceptions/views on the Waterfront plans. This included a short video clip at the beginning to explain the proposals and site layout. The age question was the first question asked; those under 16 years old were excluded from completing the remainder of the survey as the processing of their data would require parental consent. Other demographic questions were included at the end at the end of the survey.

4insight developed the questionnaire in 'Word' format for review and once finalised and agreed this was programmed into our professional survey software and **hosted by 4insight**. The survey was hosted by 4insight ensures adherence to the strict research Codes of Conduct, independence, and helps to elicit more open responses from participants. The survey was also translated, programmed and available in Portuguese.

The survey was designed to take a maximum of 10 minutes to complete to ensure quality responses and engagement. The survey was also optimised for easy completion on smartphone, tablet, laptop and PC. 4insight's in house professional software allowed for cross tabulations by various questions to be conducted allowing for comparisons across the different socio-demographics and any behavioural segments.

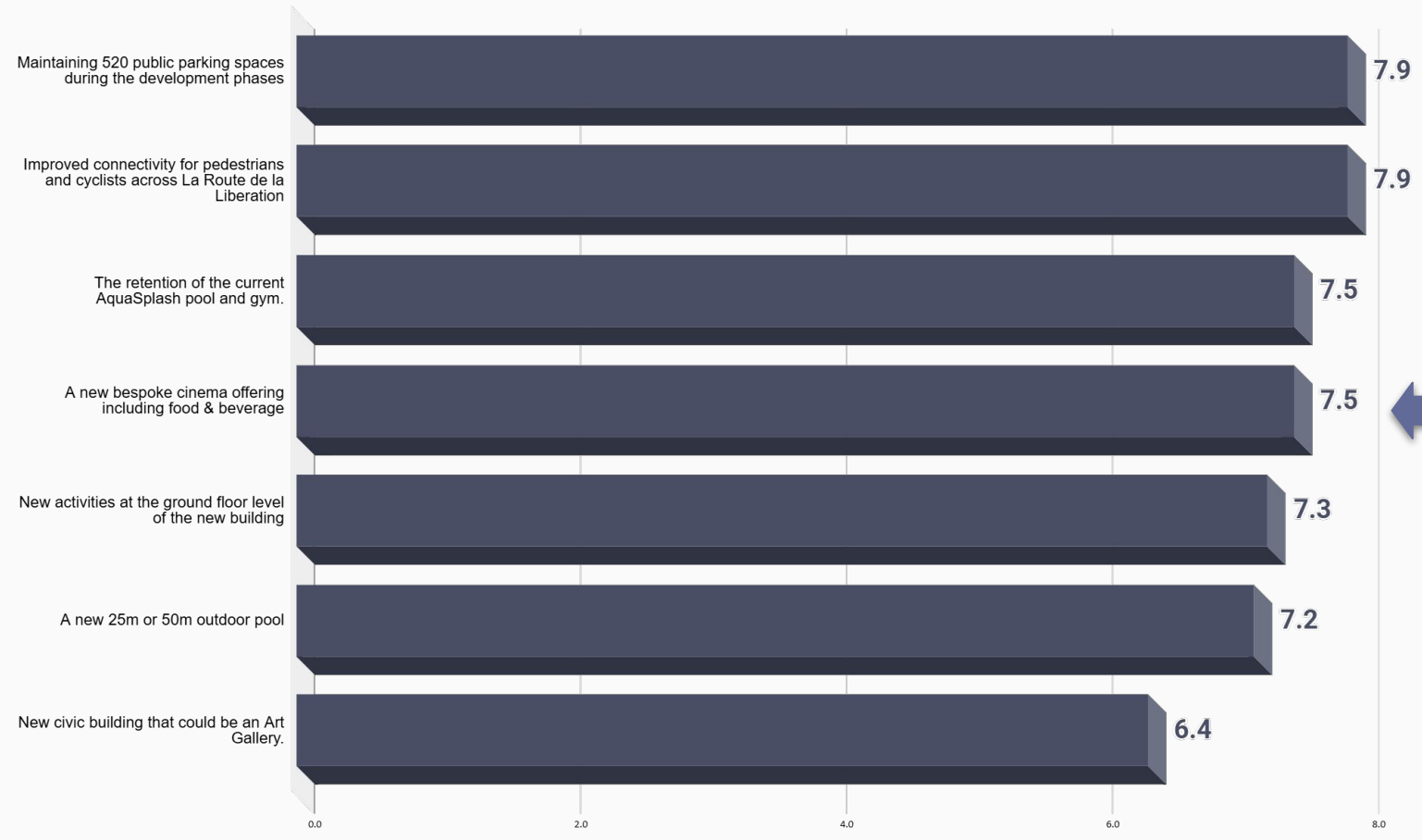
The survey was reviewed, tested and approved by yourselves before it went live. There was a 'soft launch' to a small number of respondents to triple check all was working prior to a full survey launch. A URL and QR code was provided and used in press releases and social media posts. The online survey was supplemented by CAPI (Computer Assisted Personal Interviewing) by 4insight professional street interviewers (15%) at key locations across the island to achieve hard to reach audience engagement such as under 25 year olds and those from any underrepresented groups.

The survey **went live on 6th November and closed on 10th December 2024**, after data cleaning, the final number of survey responses included in the analysis was **2,190** which is a great response rate and a statistically representative sample size for Jersey.

# Quantitative Research

# Respondents were most satisfied with the 'parking spaces' and 'improved connectivity' (7.9) features of the proposals

How satisfied are you with the following features of the new waterfront plans, where is 1 'Extremely Dissatisfied' and 10 is 'Extremely Satisfied'



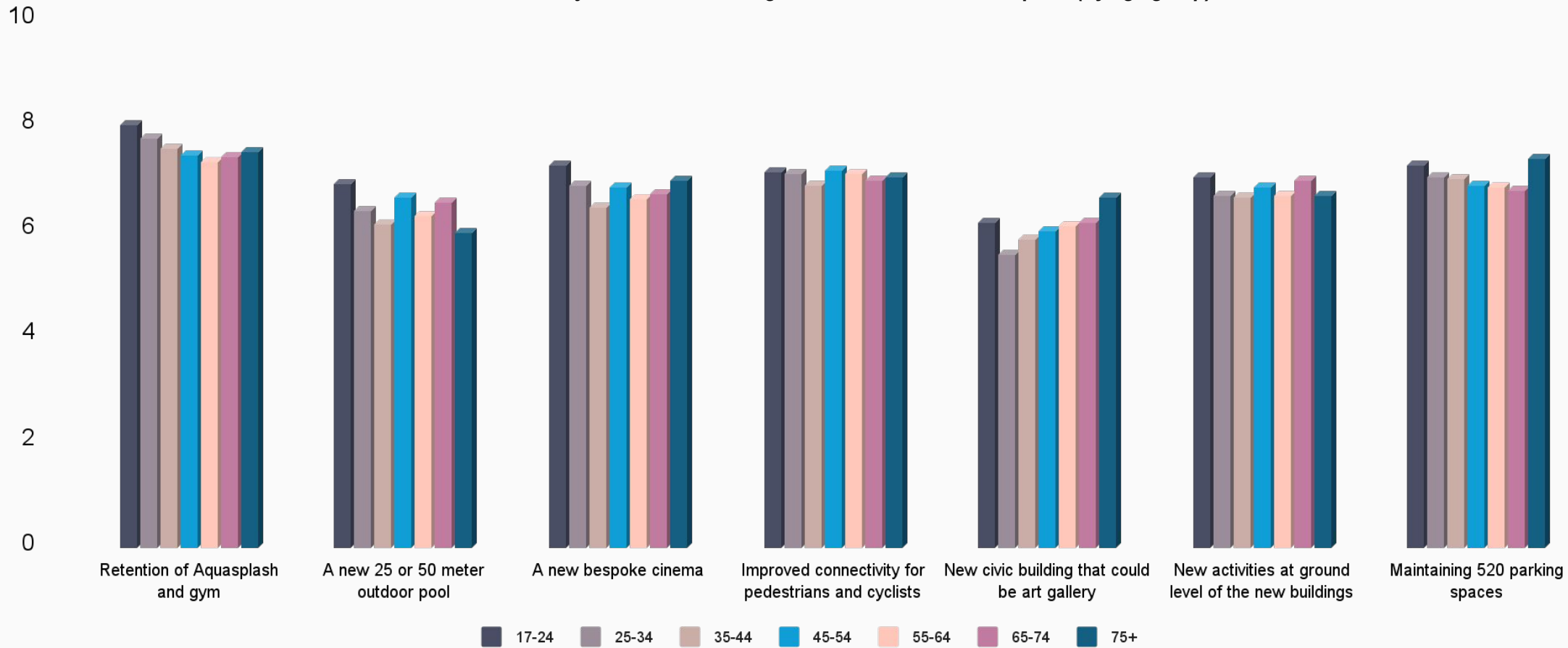
A new bespoke cinema offering food and beverage was most popular with respondents who reported a household income of £100k plus.

n=2126



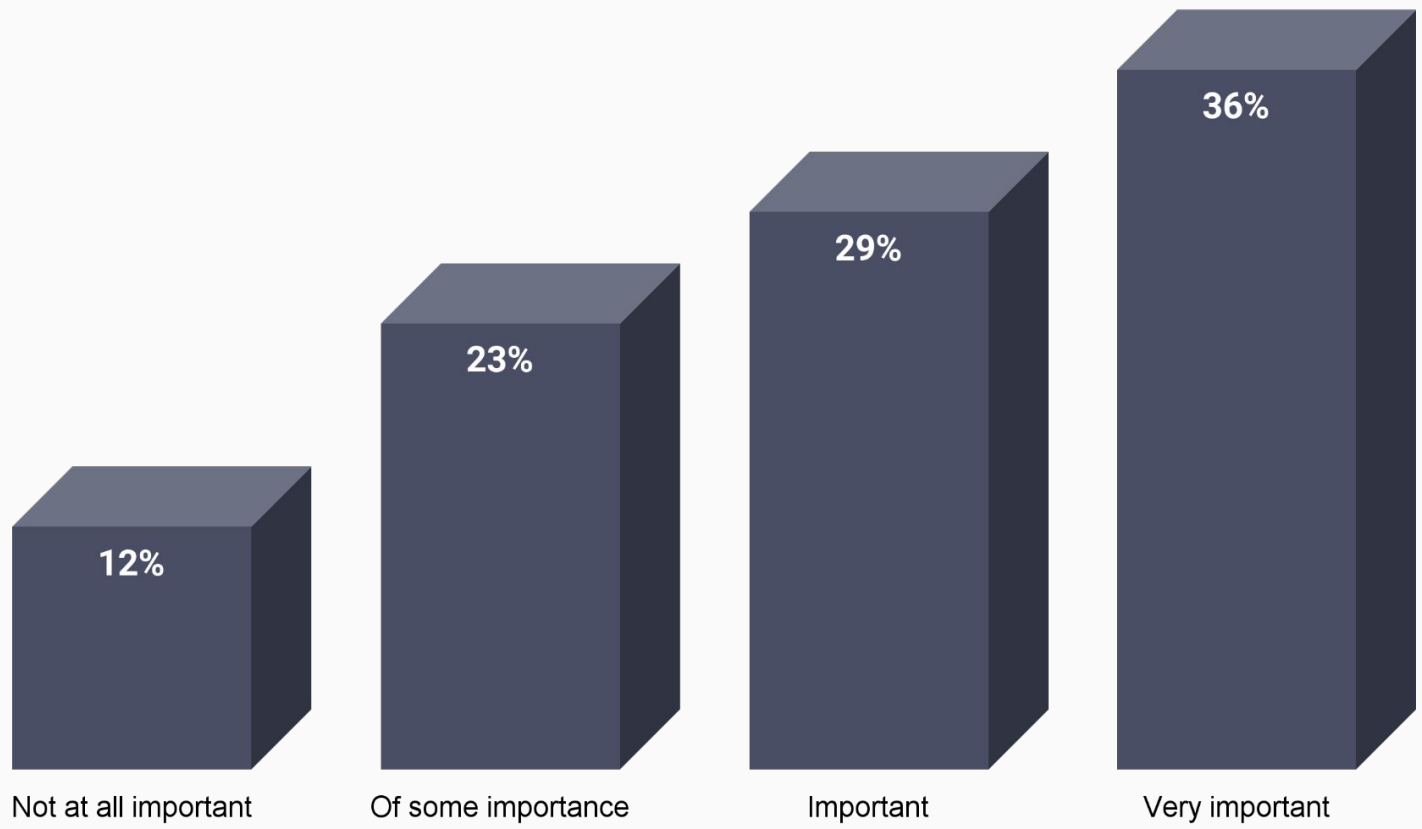
# Features that promote physical activity such as retention of the Aquasplash, gym and new outdoor pool were most popular with young people; a new civic building was more popular with under 25 year olds and older age groups

How satisfied are you with the following features of the waterfront plan? (By age group)



# The majority (88%) of respondents feel it's important to open up views between the new Waterfront buildings and the coast

These new plans will open up views between the new Waterfront buildings and the coast when viewing from town. How important is this to you?

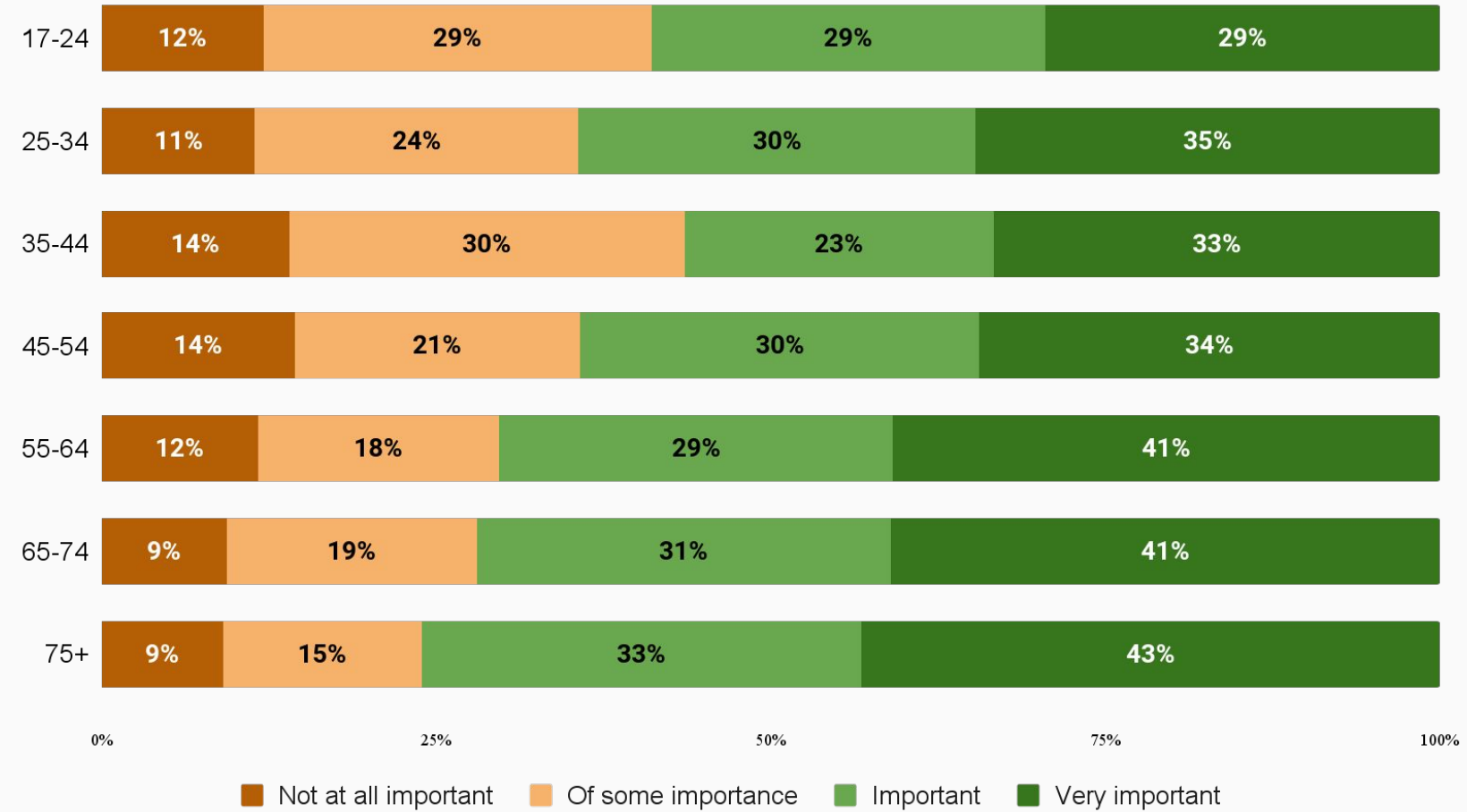


There was no significant difference in views between respondents who live in St Helier compared to those living in other parishes.

n=2125

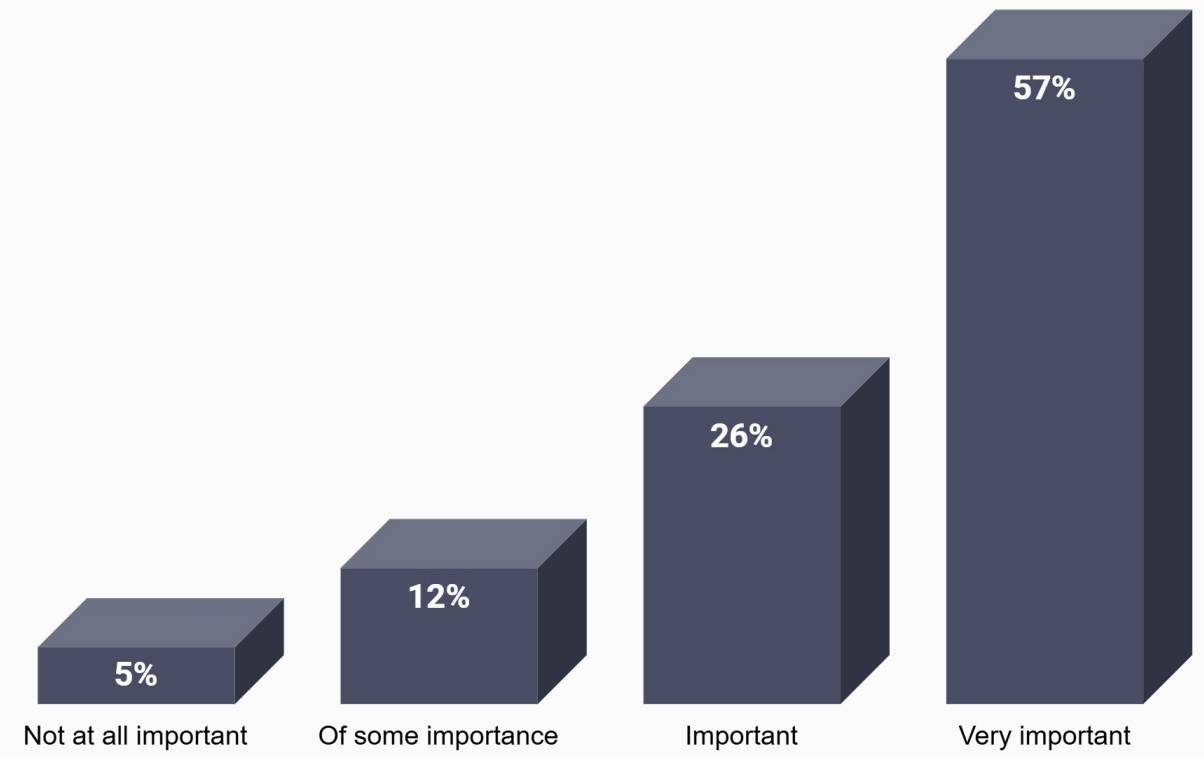
# Opening up the views between the Waterfront buildings and the coast was more important for respondents in older age groups

These new plans will open up views between the new Waterfront buildings and the coast when viewing from town. How important is this to you? (By age group)



# 95% of respondents think it's important to improve connectivity from town to the Waterfront

How important do you think it is to improve connectivity from town to the Waterfront for pedestrians and cyclists?

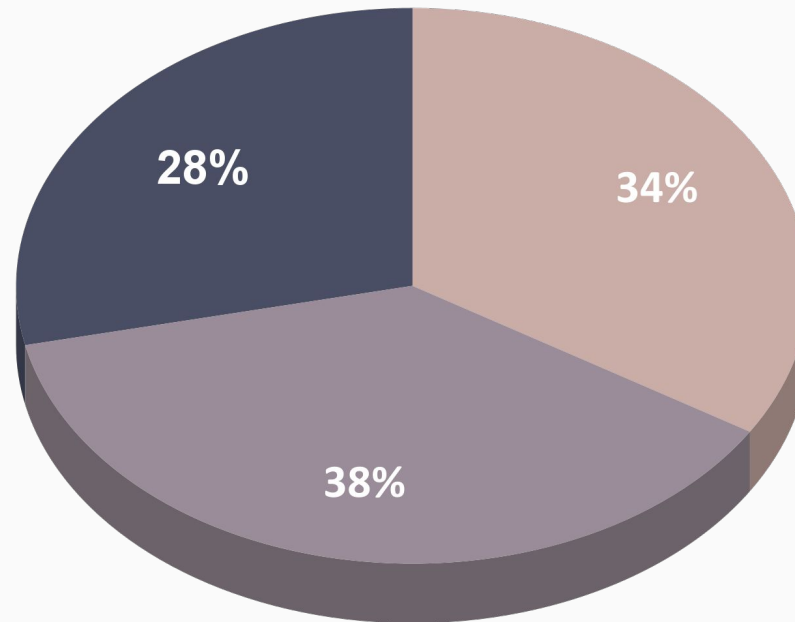


Respondents living in all parishes thought it was important to improve connectivity; active travel commuters living in most island parishes are likely to benefit from improved connectivity between town and the Waterfront.

n=2119

## Only a third of respondents agree the proposals could support the ambition of attracting more tourists

Do you think the proposed Waterfront development, including the proposed new facilities could support the ambition of attracting more tourists?



● Yes ● Maybe ● No

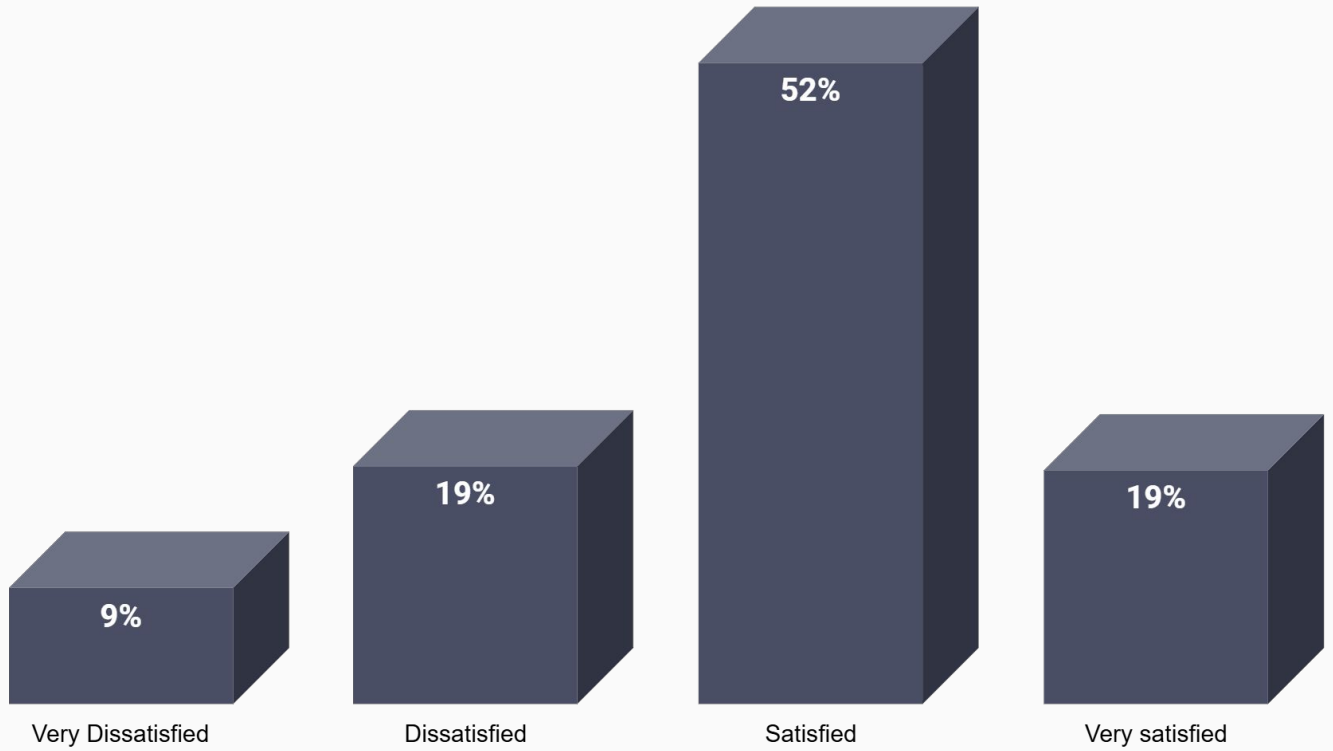
*n*=2086

60% of young people who responded (aged under 25) thought the proposals could help to attract more tourists.

Respondents from older age groups were more skeptical about the relationship between Waterfront facilities and the volume of tourism visitors.

# 71% of respondents reported being satisfied with the latest proposals for the Waterfront; young people were most satisfied with the plans

Overall, how satisfied or dissatisfied are you with these latest Waterfront proposed plans?

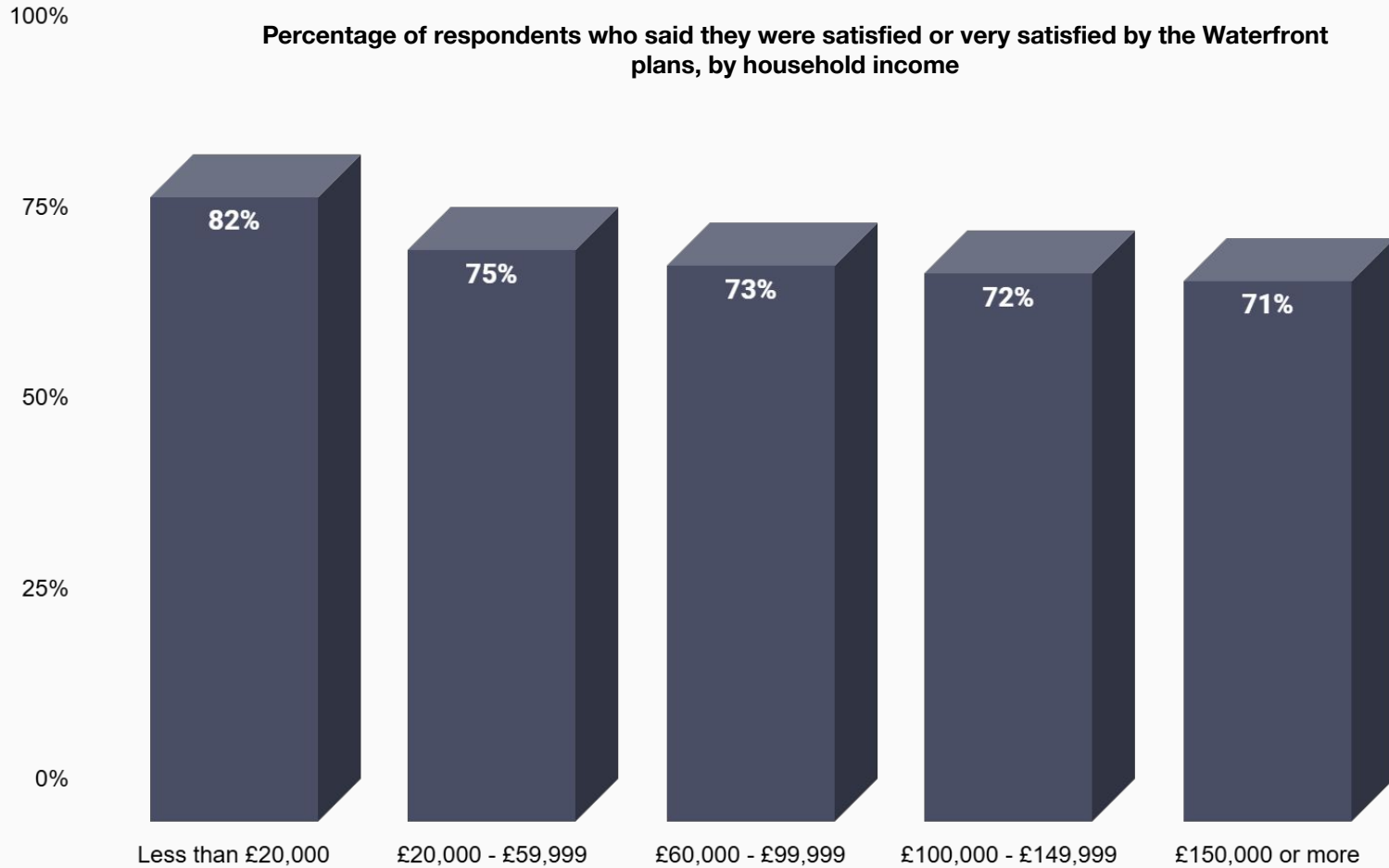


n=2086

A significantly higher proportion of young people (aged 16 to 34) reported being satisfied with the proposals (80%) compared to respondents in older age groups.

There were no significant differences in satisfaction by parish of residence.

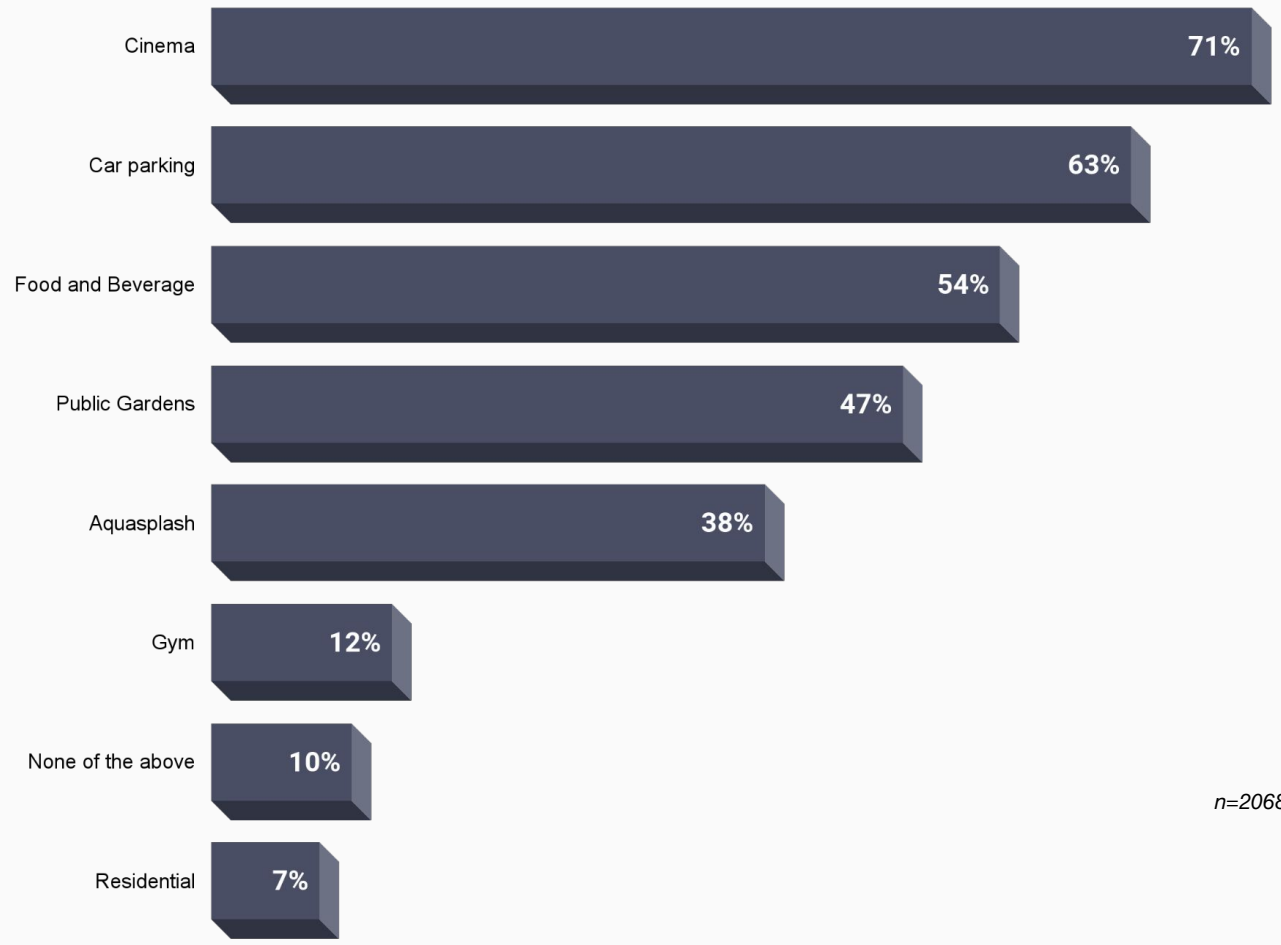
# Respondents with lower household incomes were more likely to be satisfied with the proposals



\*Household income levels and age have been found to be highly correlated.

# The majority of respondents reported using the current cinema, car parking and food and beverage outlets; 10% said they were currently not using any of the Waterfront facilities

Are you a current user of the following activities at the Waterfront?  
(Multiple-choice)



Current Waterfront residents reported high levels of satisfaction with the new proposals; three-quarters of Waterfront residents reported being satisfied or very satisfied with the changes.

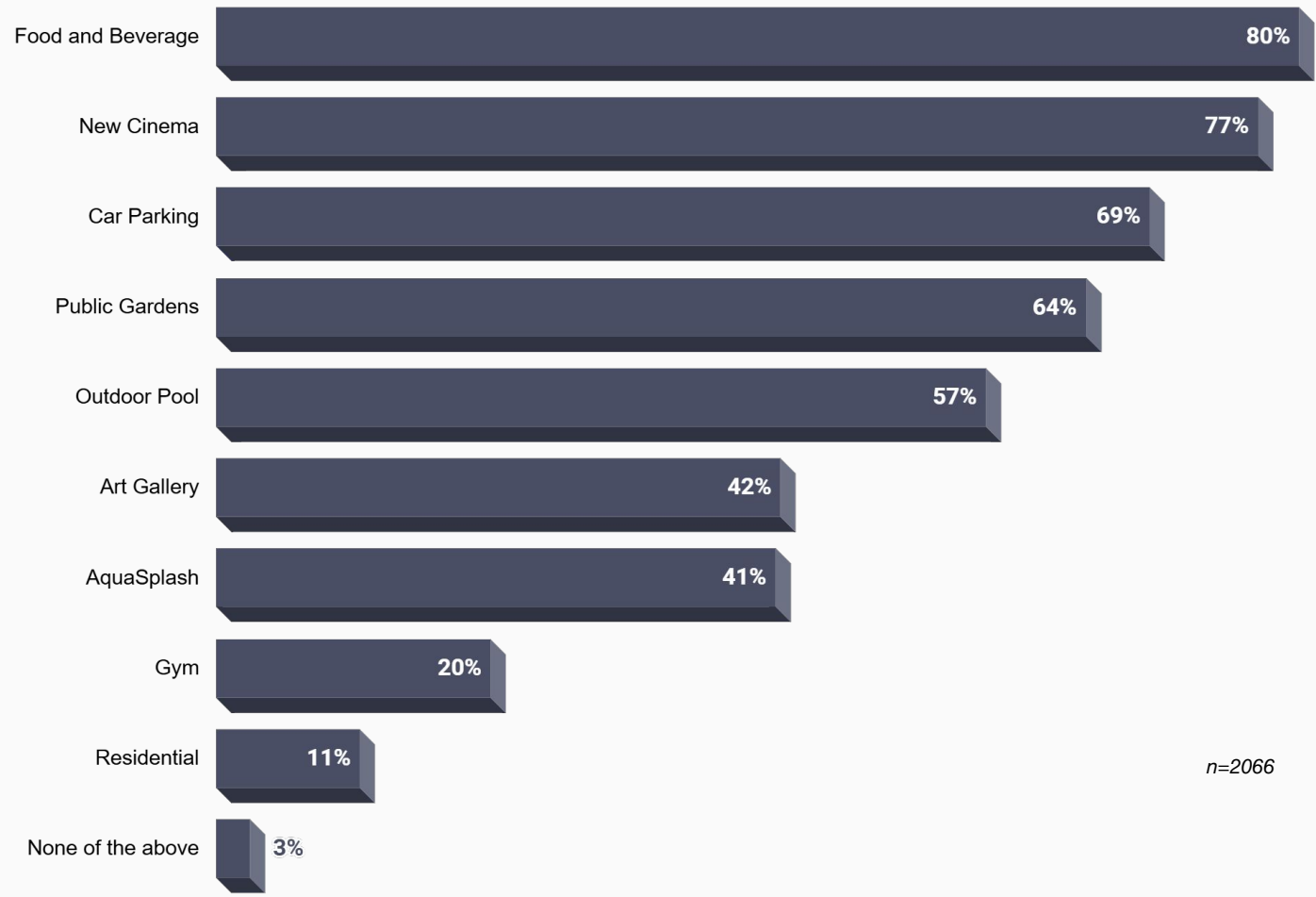
Respondents who said they don't use any of the current facilities reported high levels of dissatisfaction with the proposals; more than half of all 'non-users' said they were very dissatisfied.

n=2068



# Respondents most likely to use new food and beverage facilities and the cinema in the future

Which areas of the proposed Waterfront are you likely to use in the future?  
(Multiple choice)



n=2066

## Top comments made on the open question regarding the proposals

### Favouring Outdoor Pool

- Calls for a 50m competitive pool over 25m for swimming clubs + water sports.
- Attract sports tourism to island hosting competitions/training camps.
- A few wanted it to be salt water.

### Indoor Activities

- Indoor activity facility - bowling, arcade, escape rooms, sport courts, climbing walls etc.
- Concert and music venue.
- More to cater for children as well as teenagers/young adults.

### Public Parking Concerns

- Concerns about 520 parking spaces being removed after development.
- Car parks on island already full & concerns about Les Jardins being lost.
- Some calls for another multi storey car park.

### Nightlife and Restaurants

- Calls for the Waterfront to be a “lively” and “vibrant” destination.
- Inclusion of more bars, restaurants and nightclubs.
- Help to attract tourists and retain young islanders who are leaving.

### Residential Issues

- Several against building more flats in the area that are unaffordable and small “rabbit hutches”.
- Concerns about the building heights being too tall.
- A need to make the area more appealing first to attract residents.

### Against Outdoor Pool

- Limited use all year round due to the weather.
- High costs + energy to keep running.
- Living on an island with the ocean for outdoor swimmers.
- Prefer if it was indoors/covered.

# Executive Summary

## Sample

- **2,190** total responses - statistically representative sample size
- Included islanders + visitors
- Good demographic mix across age, ethnicity, parish and household income levels.

## Open-ended responses

- Many favoured an indoor activity facility with more to cater for children as well as teenagers/young adults.
- Concerns about 520 parking spaces being removed after development.
- Several against building more small and unaffordable flats + concerns about building heights being too tall.
- Calls for the Waterfront to be a vibrant and lively area, with bars, restaurants and nightclubs to appeal more to young islanders.
- Mixed views regarding the proposed outdoor pool. Many of those in favour wanted this to be 50m and not 25m.

## Key Findings

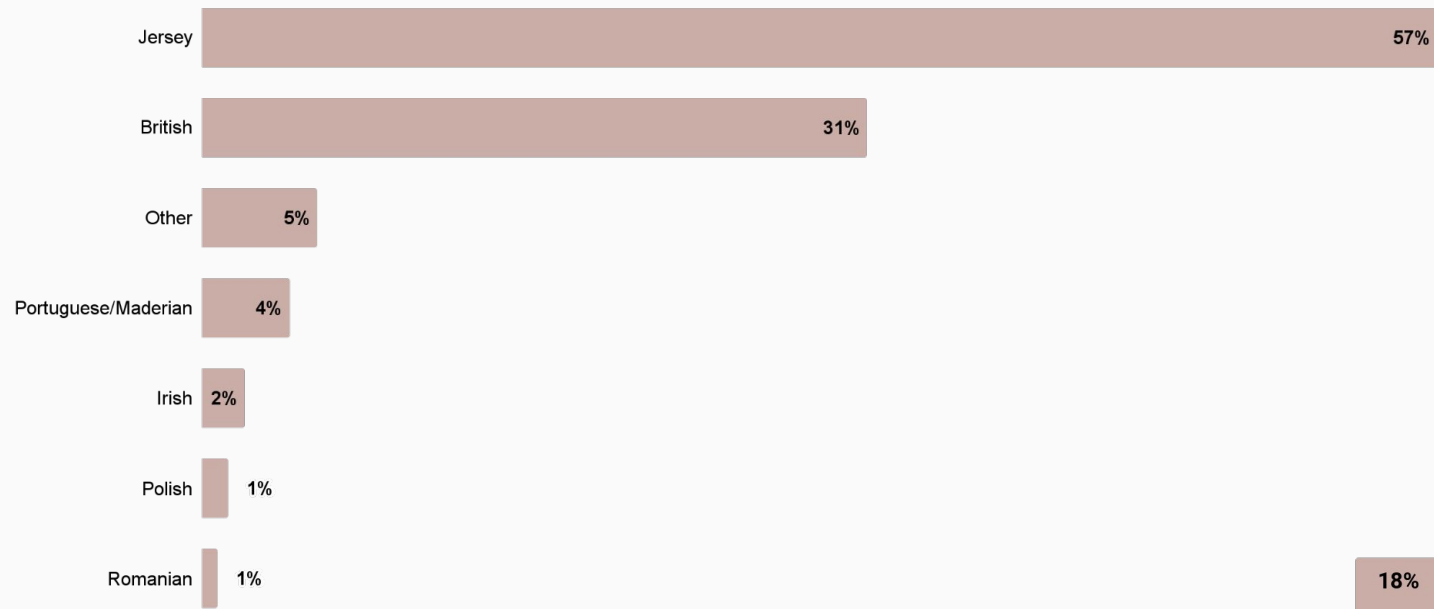
- **71%** of respondents were **satisfied** with the latest proposals for the Waterfront.
- **88%** feel it's important to open up views between the new Waterfront buildings and the coast. This was more important for older demographics.
- **95%** of respondents think it's important to improve connectivity from town to the Waterfront.
- **34%** agree the proposals could support the ambition of attracting more tourists with 60% of young islanders (under 25) agreeing.
- On average, respondents most satisfied with the 'parking' and 'improved connectivity' features of the proposal, scoring 7.9/10.
- 7.2/10 in support of an outdoor pool.
- Respondents least satisfied with an art gallery, scoring an average of 6.4.
- The majority of respondents reported using the current cinema (71%), car parking (63%) and food and beverage outlets (54%).
- Respondents who said they don't use any of the current facilities reported higher levels of dissatisfaction with the proposals.
- Respondents most likely to use new food and beverage facilities and the cinema in the future.



# Appendix

# Demographics

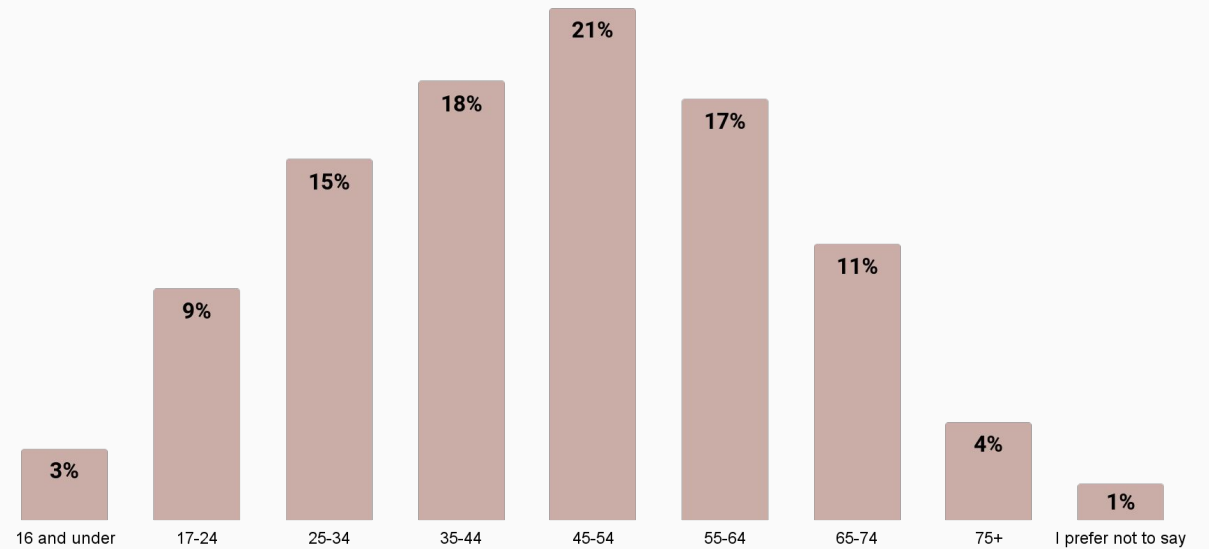
Nationality:



**Other:**

- French
- American
- German
- Italian
- Guemsey
- South African
- New Zealander
- Australian
- Bulgarian
- Finnish
- Mauritian
- Ghanaian
- Brazilian
- Danish
- Iranian
- Nigerian
- Chinese
- Egyptian
- Finnish
- Kenyan
- Slovakian
- Russian
- Asian
- Zimbabwean
- Venezuelan
- Greek

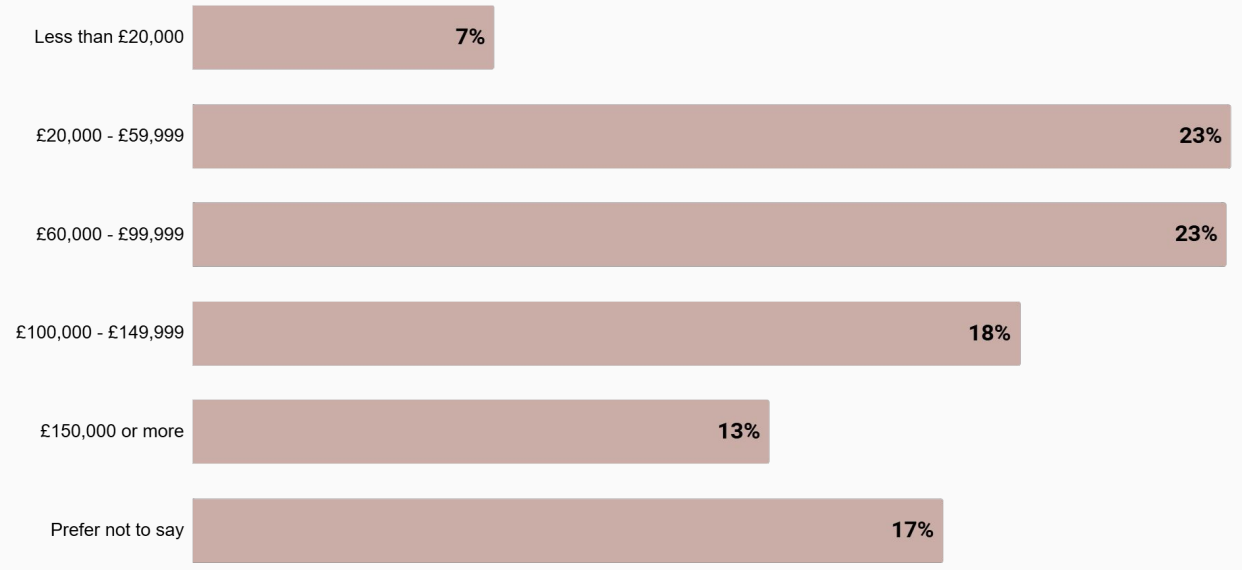
Age:



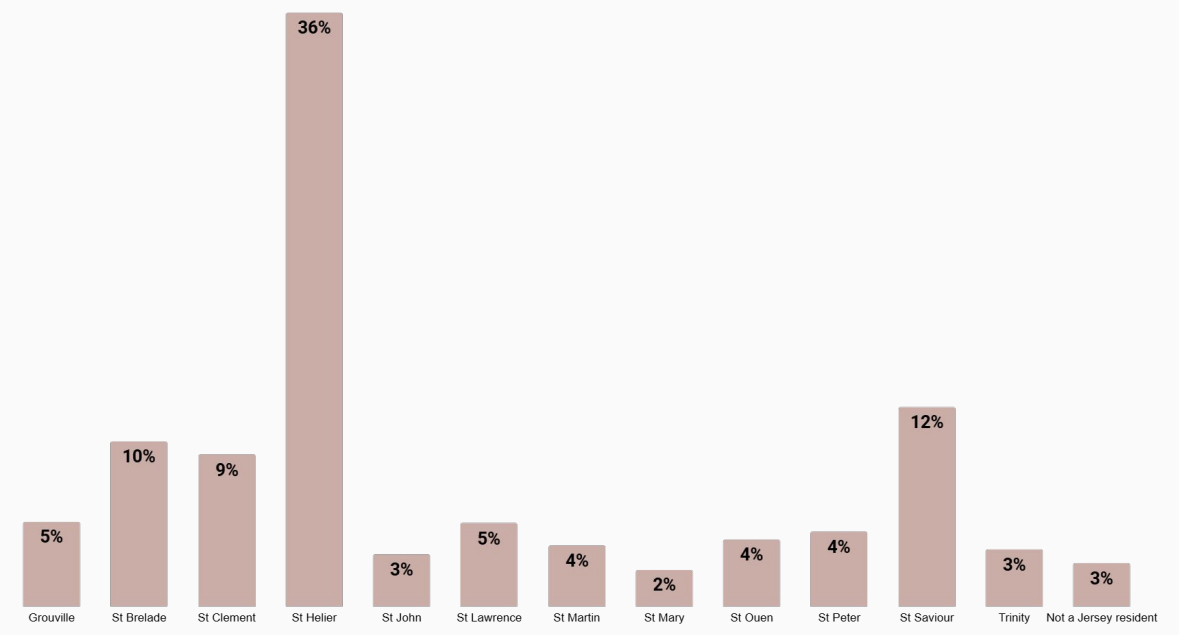
n=2190

# Demographics

Income:



Parish:



n=2058

## Current non-users excluded:

### Average Scores (/10):

Maintaining Parking spaces: **8.0**

Improving Connectivity: **8.0**

Retention of Aquasplash: **7.6**

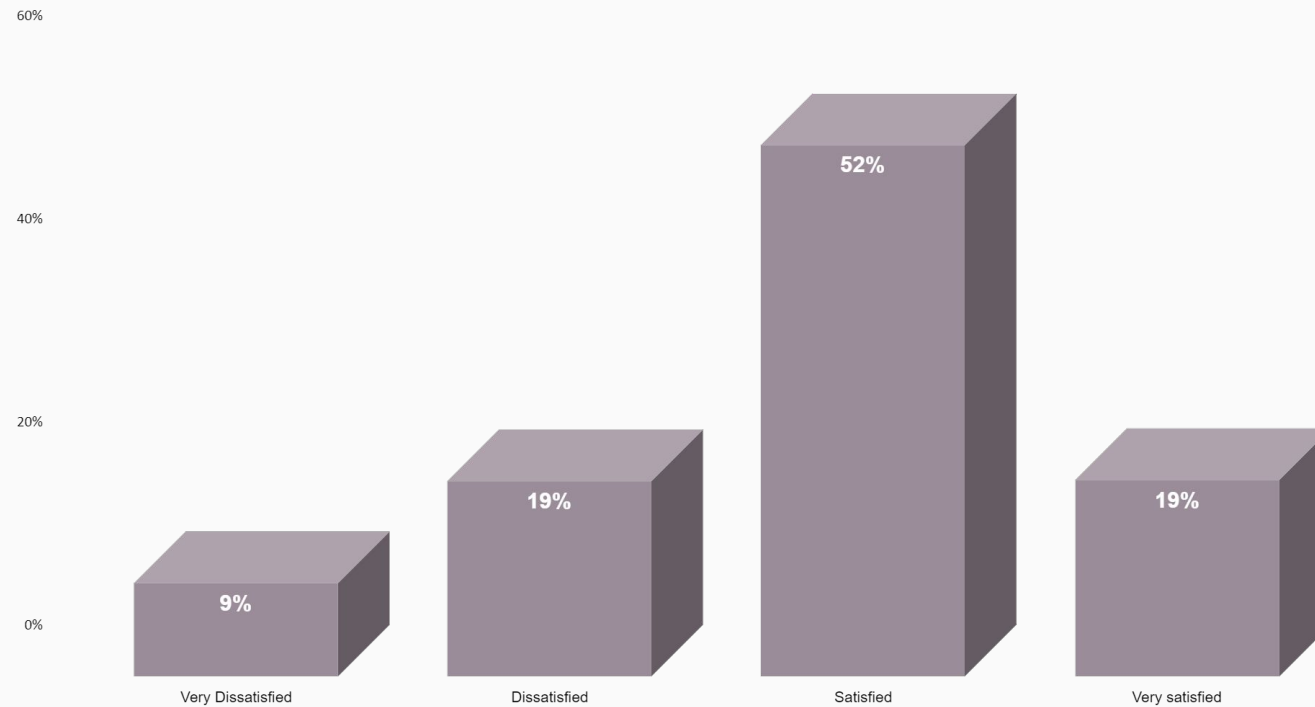
New bespoke cinema: **7.6**

New activities at ground floor: **7.4**

Outdoor Pool: **7.3**

Art Gallery: **6.2**

Overall, how satisfied or dissatisfied are you with these latest Waterfront proposed plans? (non-users excluded)



n=1870

## Current non-users excluded:

With current non-users of the Waterfront excluded, only 1% of respondents would not use any of the new facilities.

