

# **Productivity Survey 2025**

## **Results**

# High / Low Productivity

## What Does High Productivity Look Like?

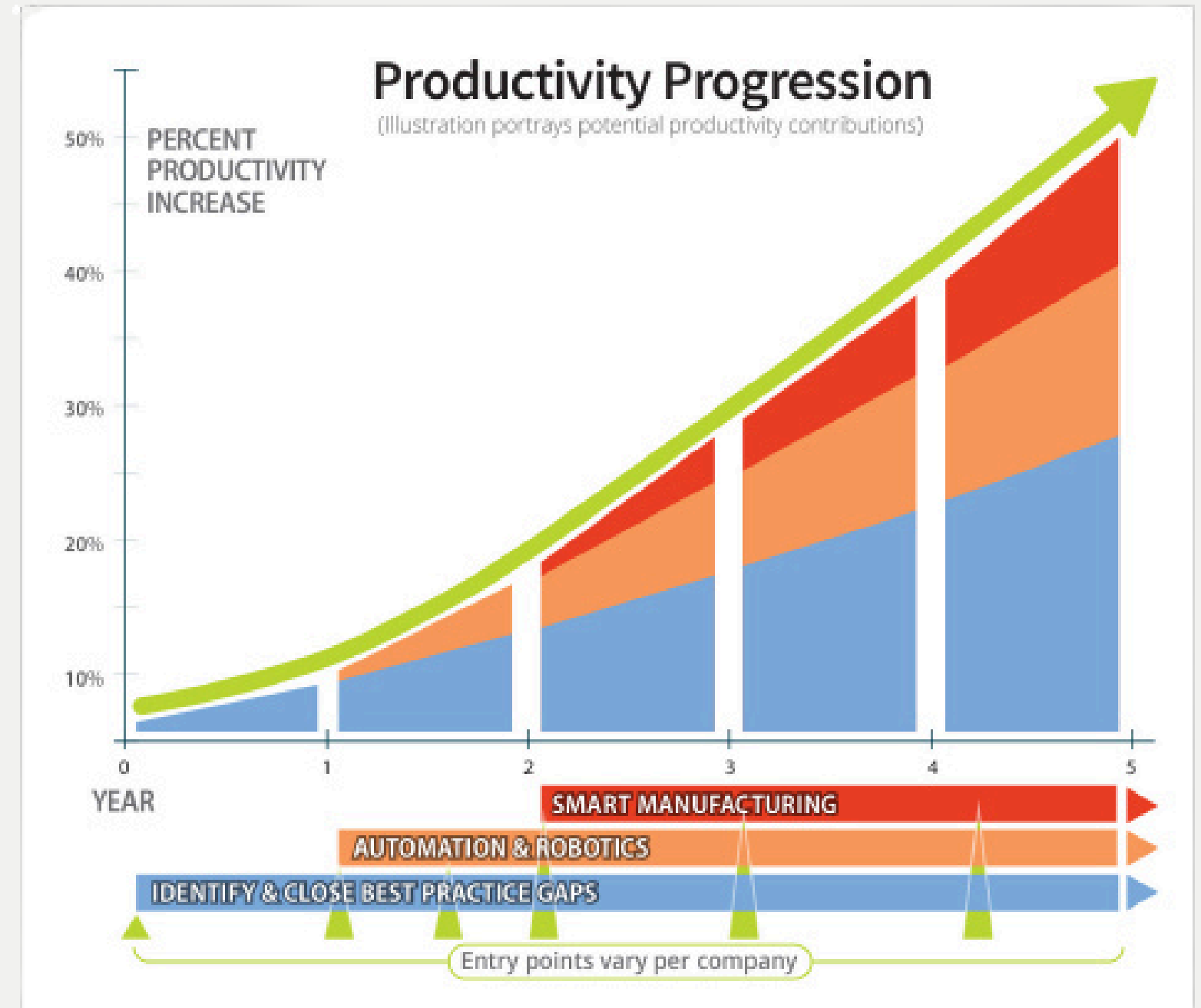
- Efficient processes and strong output
- High-quality results with fewer errors
- Motivated, empowered teams
- Better customer satisfaction and profitability

## What Does Low Productivity Look Like?

- Frequent delays, missed targets, or rework
- Low employee engagement and morale
- Poor resource utilisation
- High operating costs with limited output

## What Should Higher Productivity Achieve?

- Greater business agility and resilience
- Improved profitability and competitive advantage
- Enhanced employee wellbeing and engagement
- Sustainable, long-term growth

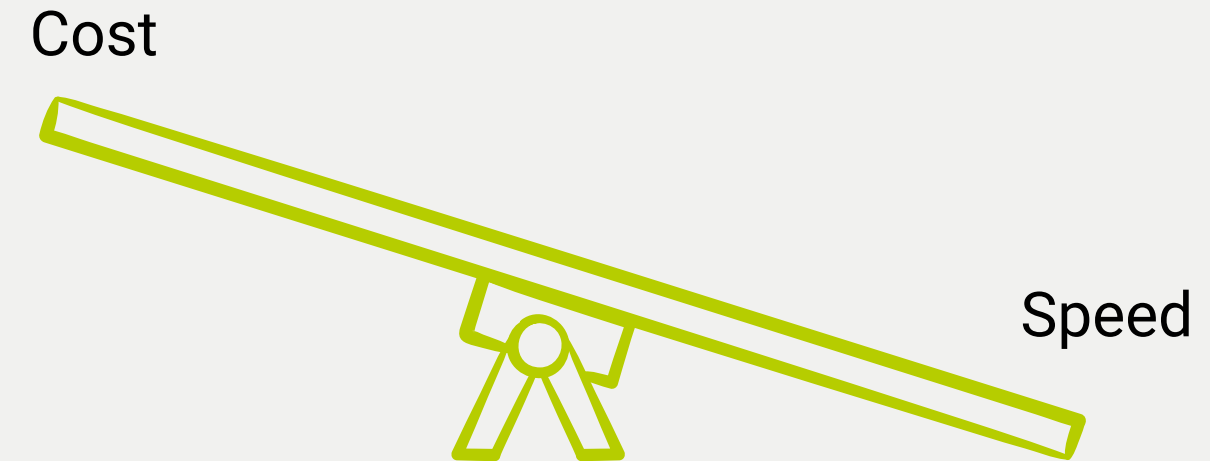
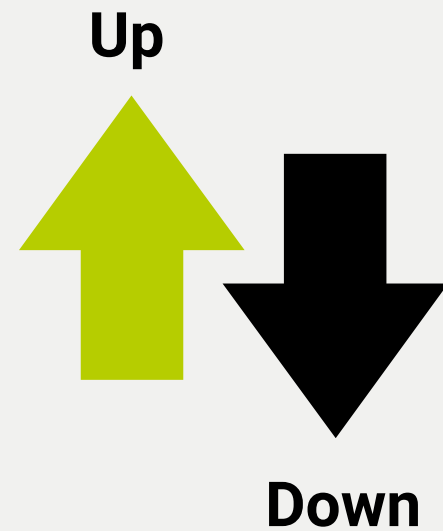


# How does high/low productivity feel?

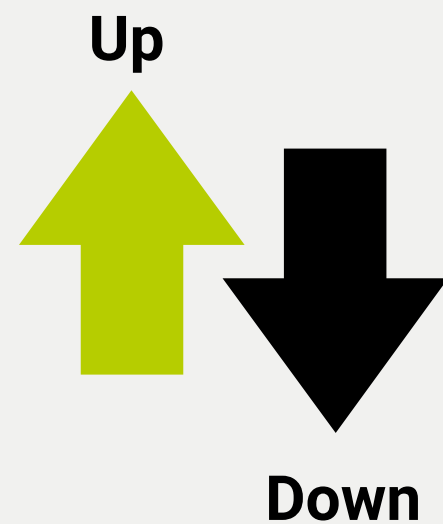
## Three views:

- People
- Business
- Economy can be applied

Un - productive

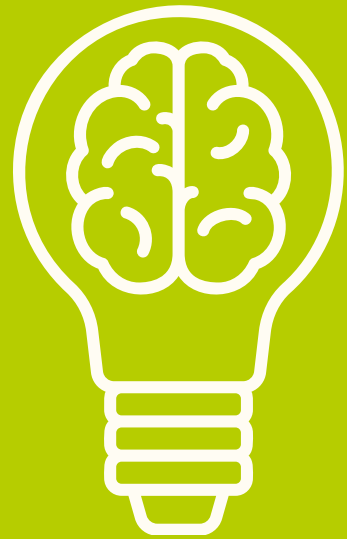


Productive



# Increased Business Productivity

**Innovation and digital**



**Worker skills and wellbeing**



**Leadership and management**



**Marketing and communication**



**Access to finance**



# Jersey Business Productivity Survey

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A real pulse check on Jersey's  
business community  
Led by insight, not opinion

- 01** Delivered with 4insight, an independent research agency for the fourth consecutive year
- 02** Gives us a clear, independent view of how productive our island's businesses really are
- 03** Tells us all where support is working — and where it's most needed / needs to be improved
- 04** Builds a robust evidence base to shape our services and influence policy
- 05** 240 businesses took part across all sectors, sizes, and stages
- 06** Fully anonymous — encouraging honest, practical feedback

# Why it matters - turning data into impact

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**01** Ensures Jersey Business target support where it makes the biggest difference

**02** Helps us track productivity progress year on year

**03** Gives every business a voice in shaping the island's economic future and support

**04** Allows us to all take action, support and focus

# Statistics Jersey

## Oct 25 Report

### 2024 Productivity Outcomes



**GVA for the JB supported sectors\* grew by £64m or +1.9%**

GVA per FTE 2024 grew by average £2.8k per FTE or 4% by sectors we support\*

**Overall, the Jersey Economy GDP decreased by 0.7% and GVA decreased by 1.3%**

\*removing Public Admin, Finance, Education and Health

# 2025 Productivity Picture

**Jersey's business community shows strong engagement but uneven progress**

**4 in 5 organisations say they focus on innovation and listen to their people**

**Only 17% have a formal productivity strategy in place**

**Process efficiency and harnessing technology** top the list of improvement areas

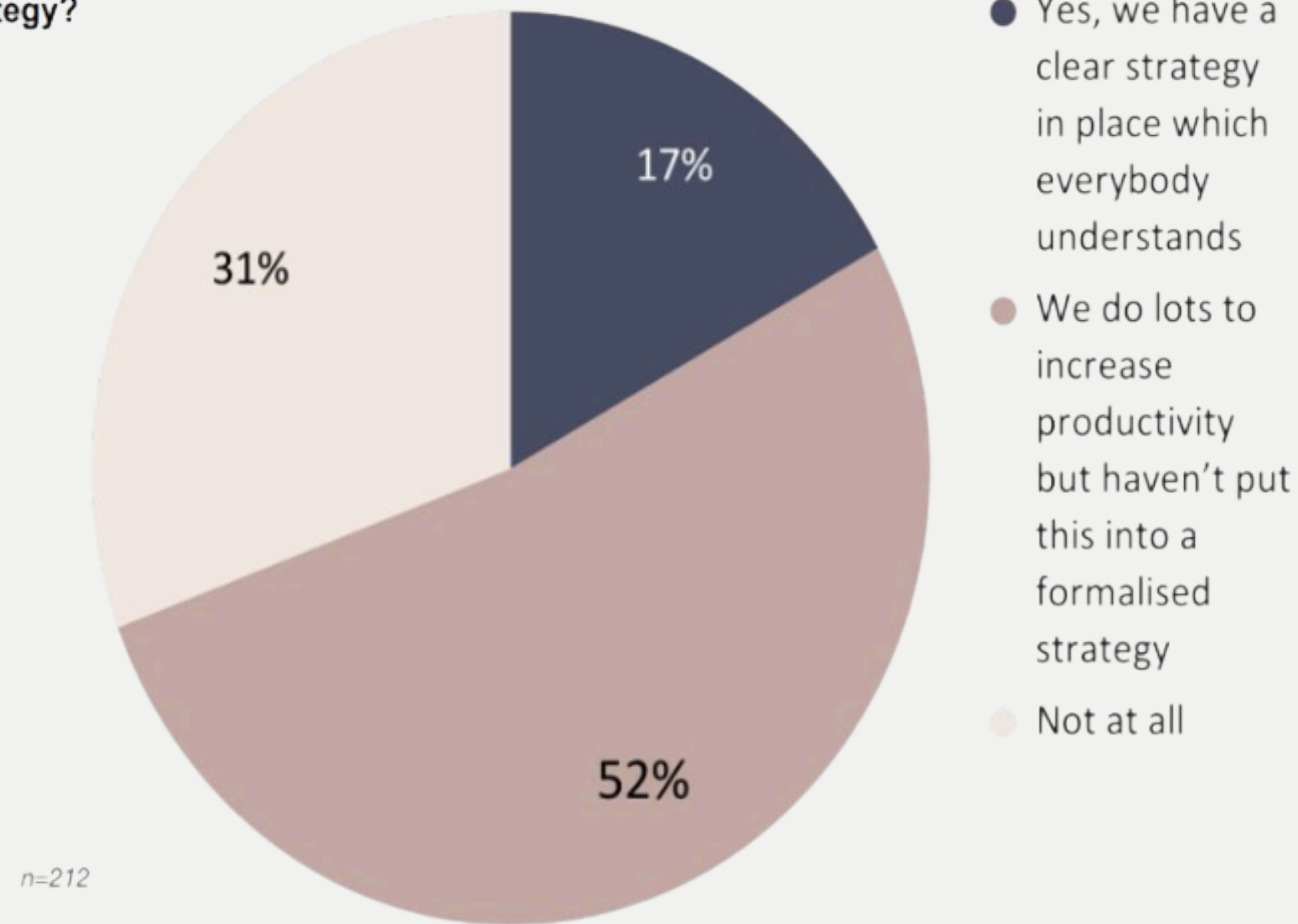
Average working day still **24% unproductive** - 1% change since 2024

Business link productivity to **culture, leadership, and digital tools**, not just hard investment

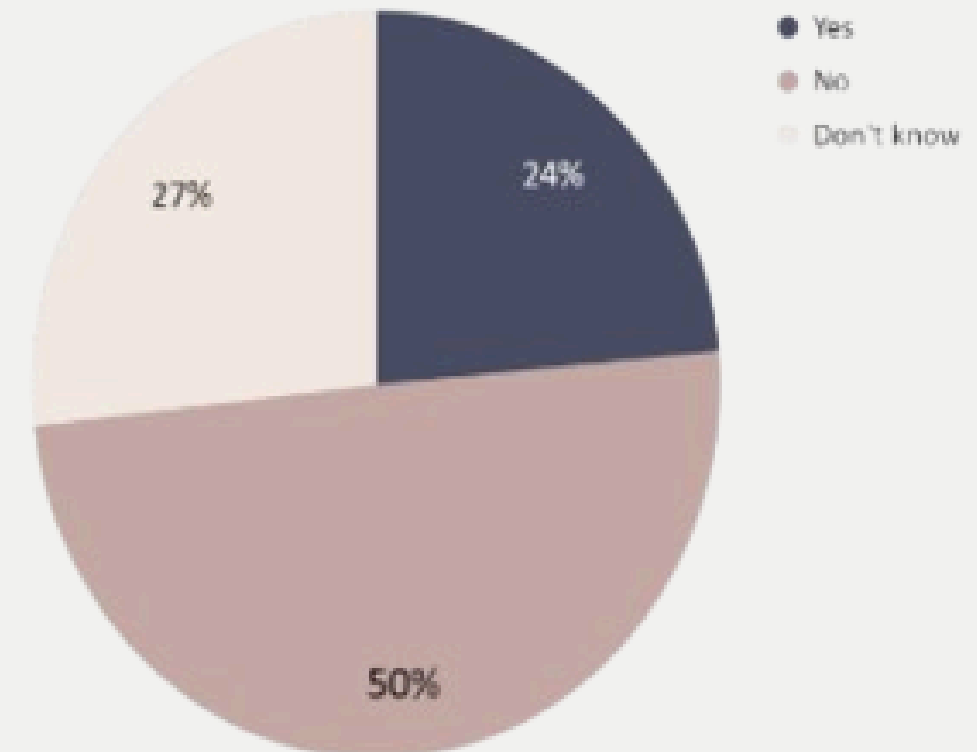


# Just 17% have a clear productivity strategy in place - 31% said 'Not at all'

Q. Does your organisation have a productivity strategy?



*\*2024 survey - different answer options:*



# Key Strengths - Momentum to Build On

People, purpose and progress are strong foundations

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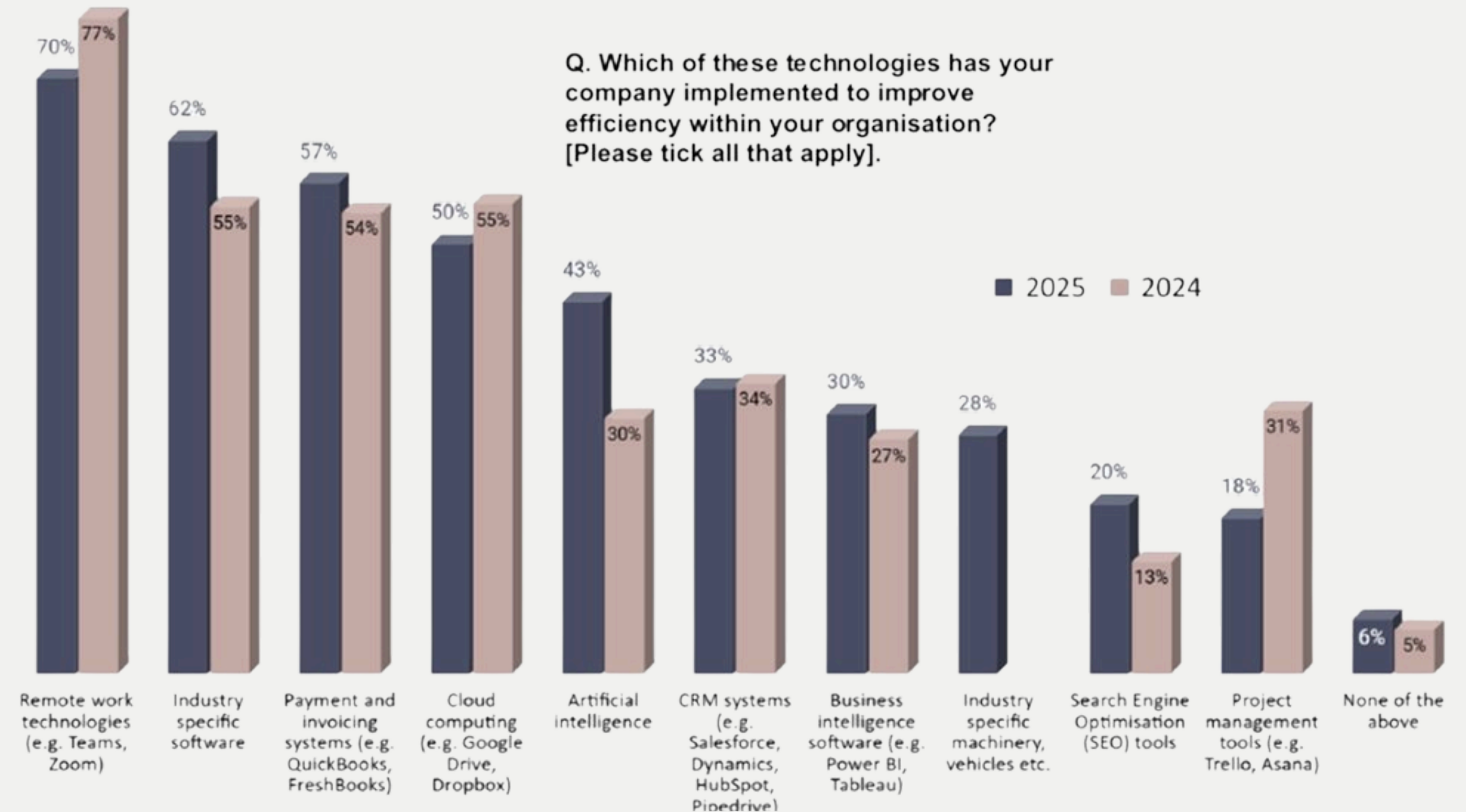
**79%** focus on innovation

**45%** Leadership and technology skills are the most common areas of investment (both @ 45 %)

**83%** are happy in their role and feel supported and trained

**82%** feel heard and empowered to make change  
AI adoption jumped to 43 % – a major shift from 30 % last year

# Increase in organisations adopting AI to improve efficiency (43%)



# Key challenges - The Productivity Gaps

Businesses see where change is needed - **but lack the resources, time and structure to act**

**Only 1 in 6 organisations has a productivity plan**

**40 %** say they don't have access to tools or resources to develop one

**Recruitment and retention (32 %), competing priorities (29 %), and lack of time (26 %) are top barriers**

**Automation remains patchy:** 60 % say processes are *not* automated where possible

## Recruitment and retention (32%), followed by Competing priorities (29%) and Lack of time (26%) perceived as the top 3 barriers to increasing productivity

Q. What do you believe are the greatest barriers to increasing productivity in your business?  
[Please select up to 5 of the following options]

2025:

**Recruitment and retention 32%**  
Competing priorities 29%  
Lack of time 26%  
Inefficient processes 24%  
Government processes 23%  
Culture and behaviour 22%  
Employee engagement 21%  
Skills gaps 21%  
Regulation / legislation 19%  
Access to finance 17%  
Ineffective communication 16%  
Stress 14%  
Resistance to change among senior management roles 14%  
Limited or lack of knowledge in how to increase productivity 12%  
Other 12%  
Inadequate technology 12%  
Unforeseen events 11%

*\*Answer options below 10% in notes*

2024:

**Recruitment and retention 40%**  
Inefficient processes 39%  
Lack of time 36%  
Resistance to change 32%  
Skills gaps 29%  
Ineffective communication 28%  
Stress 24%  
Employee engagement 22%  
Inadequate technology 22%  
Regulation / legislation 19%  
Access to finance 17%  
Lack of strategic vision 16%  
Other 15%  
Lack of equipment or materials 9%  
Limitations to accessing international markets 8%

*\*Different answer options in 2024*

# Sector Differences - Different industries face different productivity realities

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## **Construction & Building Services:**

Operationally strong but less tech-enabled.

More than 50% of construction industry respondents feel their business does not automate processes where possible – a clear opportunity for productivity boost!

## **Professional Services:**

Potential partners for knowledge-sharing.

Continuous improvement, leadership development & frequent tech investment. Strong engagement with Jersey Business; particularly Leading Growth Programme, one to one support and Better Business Grant (43%)

## **Hospitality & Tourism:**

Lots to learn from the sector with Culture, L&D and Process improvement featuring highly in productivity drivers. 71% of hospitality respondents invest in skills.

Notably low formal strategy in place though (17.6%) and only 28.6% believing they have the tools to develop one.

## **Creative Sectors:**

Wide swings in terms of drivers and strengths and little formalised effort in productivity strategies (though a collective effort here with 79.2% having an informal strategy).

Creative business respondents were also younger organisations, so more in need of early support. Steady investments across the creative sectors in people/skills.

# Emerging Opportunities – What's Changing Fast

AI, automation and people-first cultures are the next growth levers

Rapid **AI adoption**  
opens new training  
and advisory  
opportunities

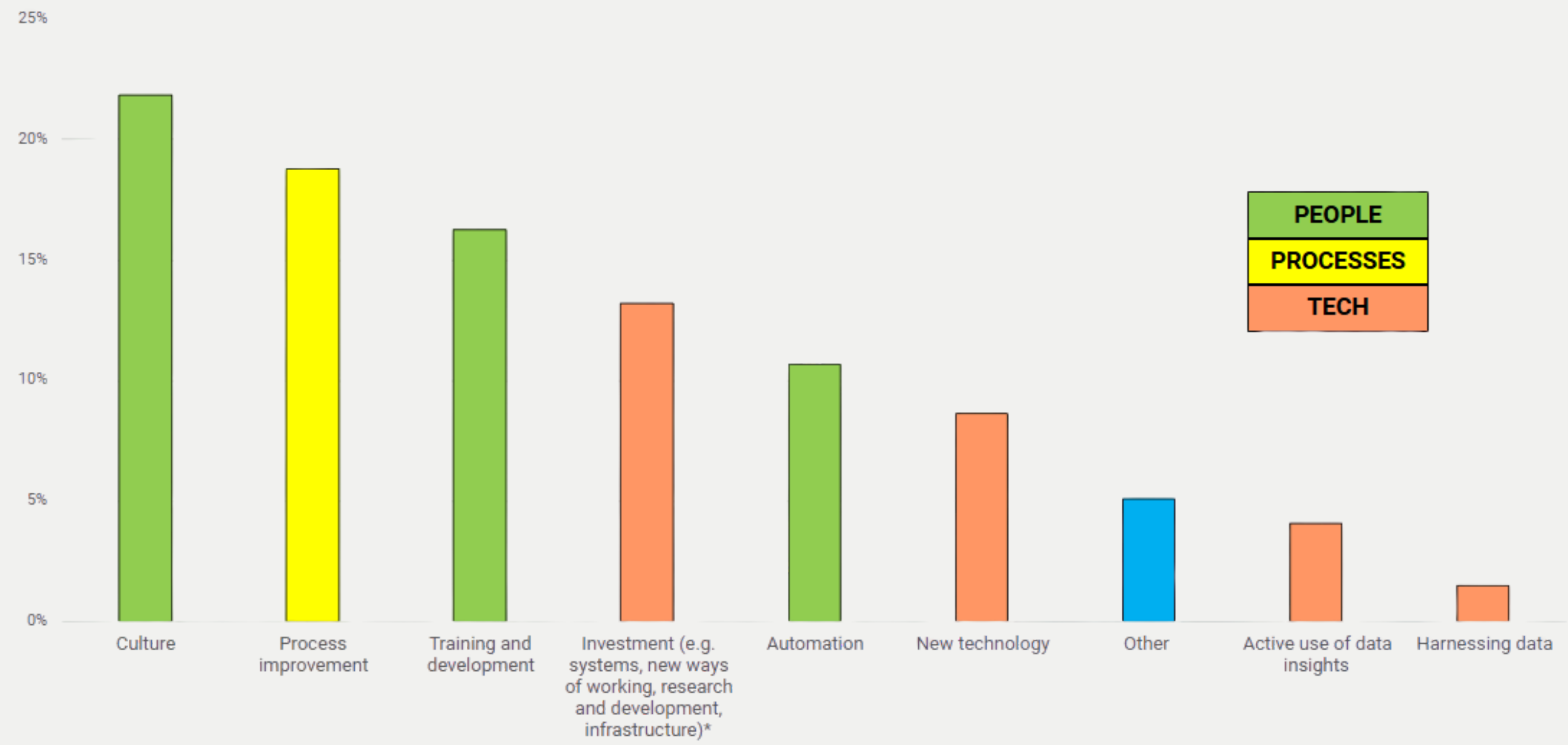
Businesses want  
**process-mapping  
and efficiency tools**  
– practical, hands-  
on help

**“Culture”** remains  
the single biggest  
self-identified  
productivity driver  
(22 %)

Blending **tech +  
leadership + culture**  
creates the winning  
Productivity formula

# What do you consider to be the key factor that drives productivity in your organisation?

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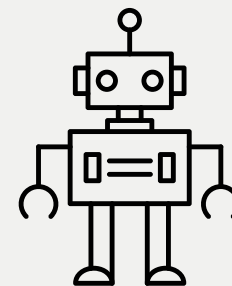
# Implications for Jersey Business

Support needs to reflect where each sector sits on the productivity journey

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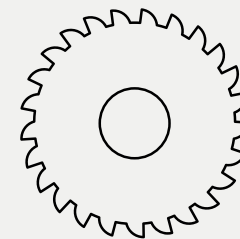
**High-capability sectors (Finance, Professional Services):** ready for advanced innovation labs and export-growth mentoring



**Operational sectors (Construction, Transport):** need digital adoption funding and leadership for efficiency programmes



**Micro & Creative enterprises:** require bite-size, affordable training and stronger awareness of funding



**Cross-cutting need:** help every business build a simple productivity strategy and track it

# Conflicts & Contradictions

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# Skills Investment vs. Skills Gaps

**45–50% of organisations** report investing **industry-specific, technology-based, and leadership** skills

Yet **21%** still cite **skills gaps** as a top barrier to productivity

Open-ended responses show extensive training efforts (e.g. Lean Six Sigma, IoD, CMI, AI, CRM, legal, hospitality), but also admissions of **no investment** or **limited impact**

**Conflict:** Despite widespread investment, skills gaps persist —suggesting misalignment between training and actual operational needs.

# Recruitment/Retention vs Staff Development

**Recruitment and retention** is the **#1 barrier** to productivity (32%)

Many organisations focus on **staff training** and upskilling as a solution

However, others report **difficulty hiring qualified staff, regulatory constraints,** and **staff turnover** as persistent issues

**Conflict:** Training existing staff is prioritised, but recruitment remains a bottleneck — especially in regulated sectors or low-turnover environments.

# Strategic Planning vs Operational Execution

Only **17%** of organisations have a **clear productivity strategy**

**66%** say they have a **clear company vision**, yet **63%** also agree there are **areas of wasted money**

Open-ended responses highlight **lack of strategic clarity, conflicting priorities, and excessive governance** as barriers

**Conflict:** Strategic intent exists, but execution is hindered by unclear priorities, poor communication, and governance overload.

# Process Efficiency vs Automation Gaps

**Process efficiency is the** top area for improvement (**44%**)

**Yet 60% disagree that their processes are** fully automated

**Whilst 43% have implemented AI, many still rely on** manual systems, **and some express skepticism about tech-driven productivity**

**Conflict:** Automation is embraced in theory but not fully realised in practice — with legacy systems and tech fatigues slowing progress.

# Feedback vs Actions

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**66%** seek customer feedback frequently or continuously

But only **34%** frequently **act on it**, and this figure has declined from 40% in both 2023 and 2024

Open-ended responses show **intent to improve service**, but also **frustration with bureaucracy and lack of follow-through**

**Conflict:** Feedback is collected but not consistently used to drive change, undermining customer-centric productivity efforts.

# Employee Engagement vs Productivity Barriers

**83%** feel happy in their role and supported

**82%** feel listened to and empowered

Yet **21%** cite **employee engagement** as a barrier, and many open-ended responses mention **low morale, lack of recognition**, and **burnout**

**Conflict:** While engagement scores are high, qualitative feedback reveals deeper issues with motivation, culture, and retention.

# Productivity Understanding vs Execution

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Productivity is widely defined as **efficiency, effectiveness, and value creation**

Yet **24% of the working day** is viewed as **unproductive**

And only **39%** feel their organisation is **optimising productivity opportunities**

**Conflict:** Conceptual alignment exists, but execution lags — with time waste, poor systems, and unclear goals undermining productivity.

## **Target Process Efficiency**

**44% of businesses see process efficiency as the biggest opportunity** — grant funding can unlock automation and smarter workflows

## **Invest in Skills That Matter**

**50% of companies prioritise industry-specific skills.** Grant can be utilised for Skills

## **Accelerate Technology Adoption**

**43% have adopted AI to improve efficiency**— grant support can help scale improvements and return on investment

## **Support Strategic Planning**

**Only 17% have a clear productivity strategy** - grant funding can support productivity initiatives

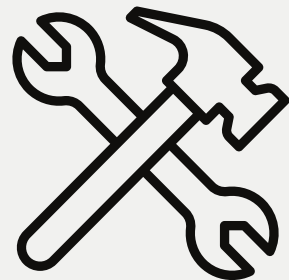
## **Deliver Tangible Outcomes**

**Time savings (37%) and cost reduction (33%) are top outcomes of productivity investments** - grant funding could help businesses amplify these results

# Takeaways and Recommended Actions

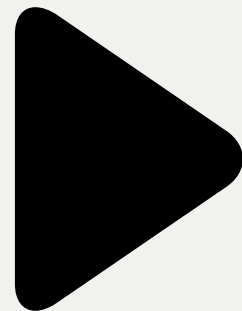
Turning insight into action – how Jersey Business can take this forward

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## **Productivity Strategy Toolkit**

Step-by-step,  
user-friendly  
template



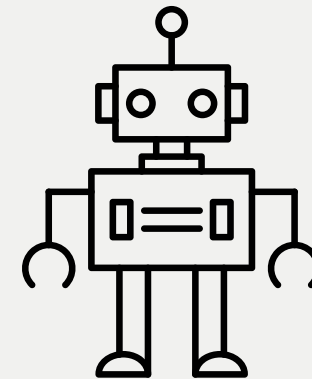
## **Ignite Accelerator**

Targeted,  
productised  
support for start-  
ups



## **Leadership & Culture Labs**

Soft-skills meets  
productivity  
training



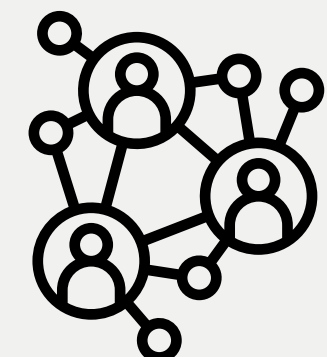
## **AI & Tech Adoption Accelerator**

Practical pilots  
with peer  
learning.



## **Grant Awareness Campaign**

Improve comms  
with simple,  
sector-tailored  
comms push



## **Sector Mentoring Network**

Pair experienced  
firms with micro-  
businesses and  
start-ups



# Next Steps

Measure, Share & Grow

## Track key metrics:

% with productivity strategy  
% using automation  
% accessing funding



Publish an **Annual Productivity Index** to celebrate progress



Run **2026 booster survey** especially focused on small, creative and transport firms, fill the gaps



**Keep the message simple:**  
productivity = people + process + tech + culture

