RESEARCH
& INSIGHT

Reopening Ireland:

Public Sentiment Survey

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Behaviour & Attitudes

June 2020

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Methodology

A nationally representative, online survey of adults aged 16+.

Sample Size

2,833

Quota Controls

Based on CSO Census 2016 figures for gender, age, region and area, as well as AIMRO agreed figures for social class.

Weights

Some corrective weighting was applied to ensure a nationally representative sample.

Fieldwork Dates

3rd - 8th June, 2020

Online Interviewing

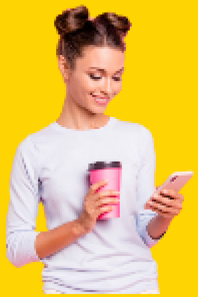
Interviewing was completed online with the use of B&A's Online Acumen Panel.

A margin of error of +/-2% points is applicable on a sample of this size.

Generational analysis

As we have done with other studies, such as the B&A Techscape 2020 report, we have conducted a **lifestage analysis.** This type of review affords us deeper insight into how Irish adults are feeling about returning to ‘normality’. Five different generations have been assessed, the definitions who which are detailed below:

GenZ



Born 1997 –
2004
Age 16 – 23

11%

416,000

Millennials

Born 1978-1996
Age 24 - 42

35%

1,361,000

Gen X

Born 1966-1977
Age 43-54

22%

830,000

Baby Boomers

Born 1947-1965
Age 55-73

29%

1,117,000

Silent Gen

Born 1946+
Age ≤74

3%

115,000

‘000s & %s = their proportion in the population aged 16+ years

Covid-19: Life had changed incredibly quickly…although at the time of this fieldwork it was beginning to feel that the worst was over (of the virus at least!).

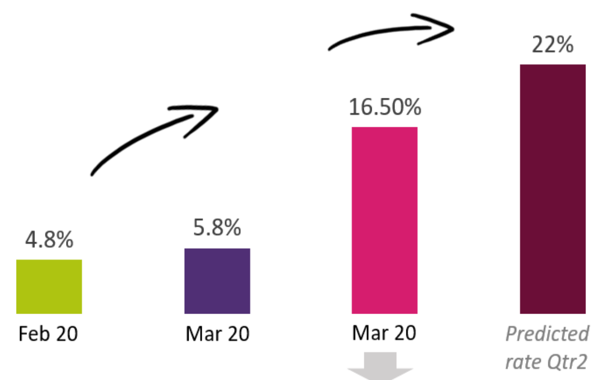
29th Feb: First confirmed case of Covid-19 diagnosed in Ireland

15th March: 292 cases, 2 deaths, schools, universities, childcare settings, pubs, playgrounds, stores closed. Social distancing measures in place. Stock markets plunging. Gatherings/Celebrations/festivities cancelled.

5th May 21,983 cases, 1,339 deaths. Lockdown measures extended to 18th May, will continue in some form until the end of the summer at least.

5th June 25,163 cases, 1,670 deaths. Announcement made that lockdown measures were to be eased, and the plan was to be accelerated.

This is a very different beast:
To put things in context, unemployment hit 16% during the last recession, and about 18% in 1983



The new Covid-19 Adjusted Measure of Unemployment would indicate a rate as high as 16.5% if all claimants of the Pandemic Unemployment Payment were classified as unemployed.

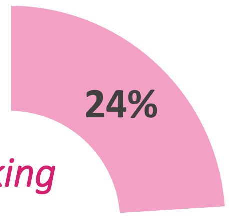
Minister Donohoe Stability Programme Update 21 April 20:

The labour market is bearing the brunt of the recession, moving from effectively full-employment in the early part of the year to exceptionally high levels of unemployment now and in the coming weeks. Unemployment of 22 per cent projected for the second quarter. We anticipate that total employment will fall by 9.3 per cent this year, with approximately 220,000 jobs being lost. Next year, employment is expected to grow by 5½ per cent (115,000 jobs), reducing the unemployment rate to below 10 per cent.

Now that the number of cases are declining, other issues are beginning to come to the fore ↑

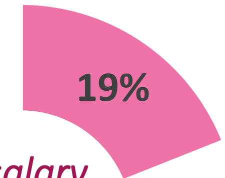
1 in 9 (11%) have lost their job as a result of the pandemic.

Base: All adults aged 16+: 2,833/3,839,000



Are working fewer hours

(Base: 721/921,000)



Have had a salary cut/Are working on the furlough scheme

(Base: 565/720,000)

Have lost their job as a result of the pandemic

(Base: 302/423,000)

Generational Profile	Are working fewer hours	Have had a salary cut/Are working on the furlough scheme	Have lost their job as a result of the pandemic
Gen Z (11%)	14%	15%	25%
Millennials (35%)	41%	47%	43%
Gen X (22%)	25%	24%	18%
Baby Boomers (29%)	19%	13%	13%
Silent Gen (3%)	1%	1%	2%

Millennials seem to be the cohort most impacted in terms of pay cuts, working hours and job losses as a result of the pandemic.

Q. And now we would like to ask you which of the following, if any, are relevant to you?

(% among All Adults)

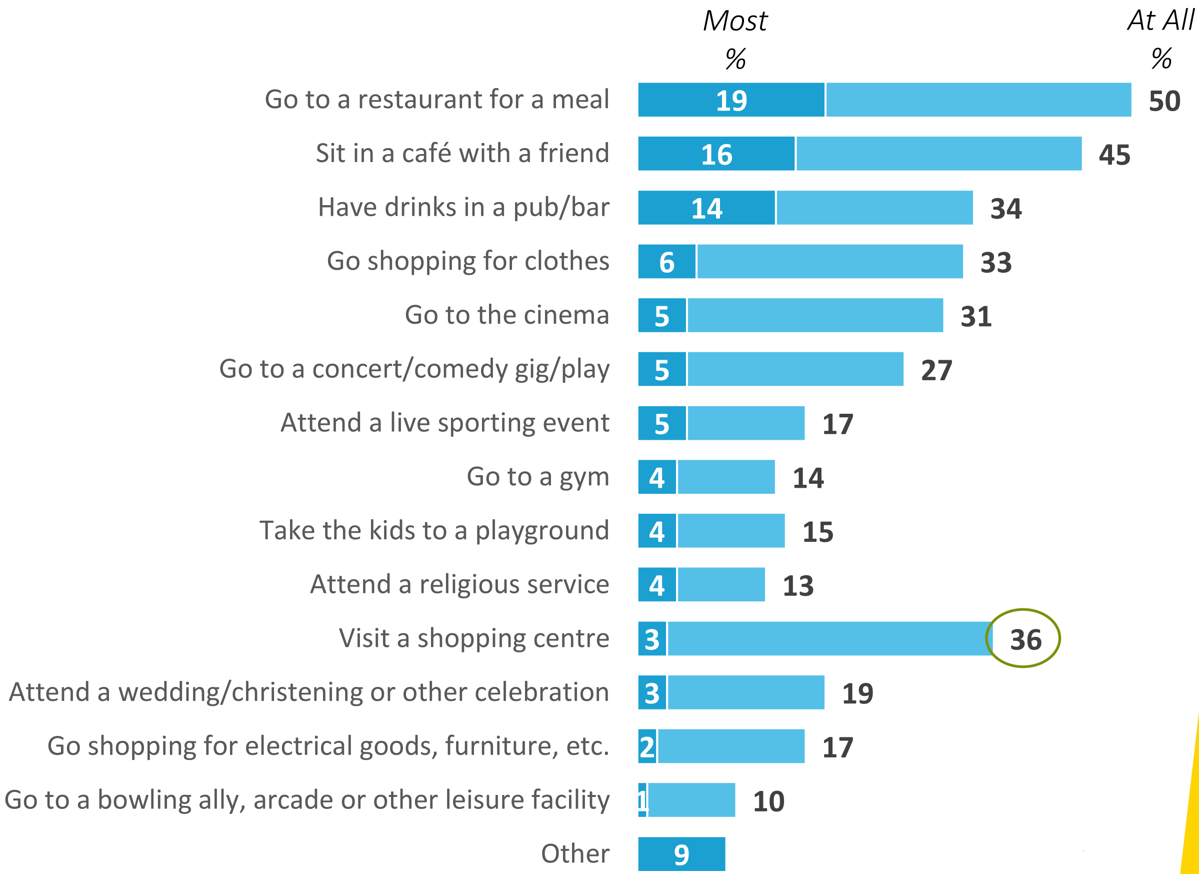
Contents

What are we most looking forward to?

Overall, one third (33%) of us are looking forward to going shopping for clothes, while more than a third (36%) are looking forward to visiting a shopping centre.

What we are most looking forward to

Base: All adults aged 16+: 2,833/3,839,000



Although it's not top of the list, more than a third (36%) are looking forward to visiting a shopping centre.

Top activity looking forward to at all x Generation

Gen Z
67% Go to a restaurant for a meal

Millennials
50% Go to a restaurant for a meal

Gen X
44% Go to a restaurant for a meal

Baby Boomers
47% Go to a restaurant for a meal

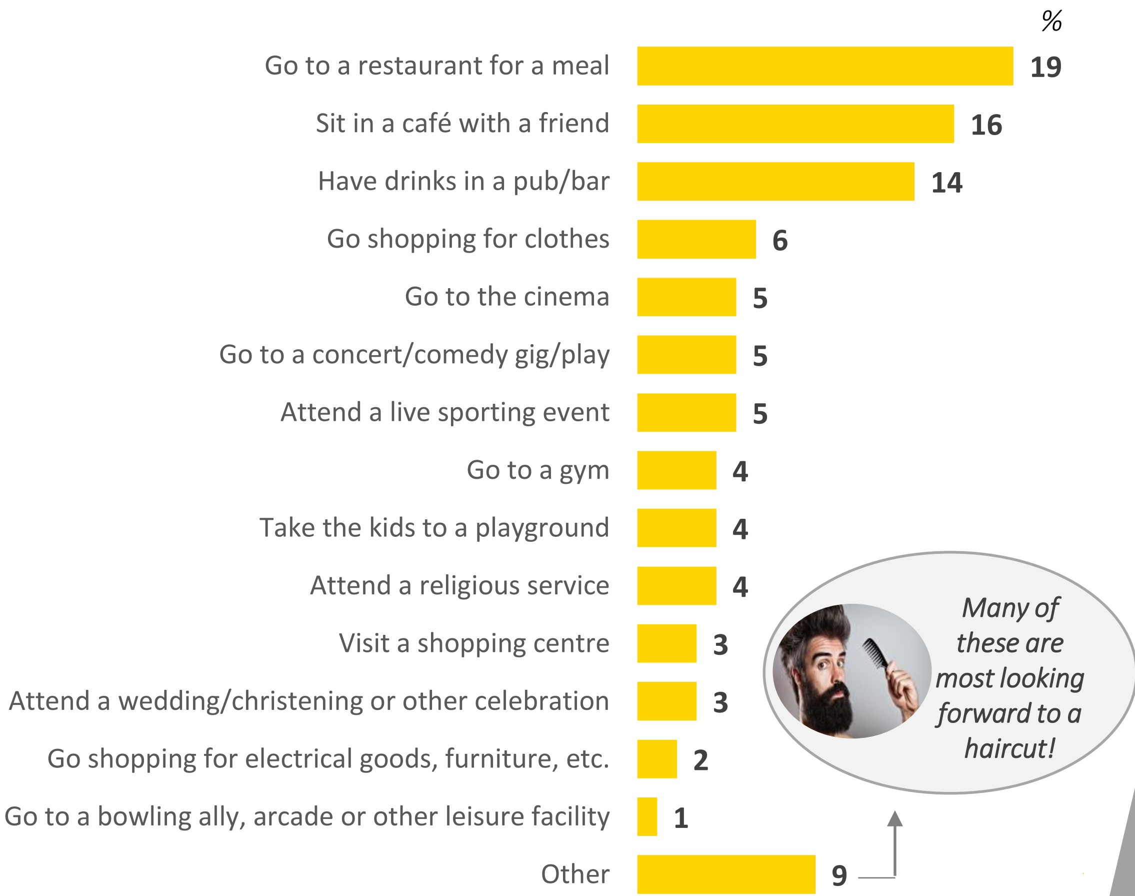
Silent Gen
51% Sit in a café for a coffee with a friend

Q. And which of the following activities are you most looking forward to doing once you feel it will be safe to do so?
Q. And which others, if any, are you looking forward to doing once you feel it will be safe to do so?

More of us are most looking forward to dining out rather than 'going for pints'.

Restaurant and cafés are top of the list of what we are most looking forward to.

Base: All adults aged 16+: 2,833/3,839,000



A fifth of adults are most looking forward to going to a restaurant for a meal.

Q. And which of the following activities are you most looking forward to doing once you feel it will be safe to do so?

What most looking forward to x Generation

Gen Z
20% Have drinks in a pub or a bar

Millennials
19% Go to a restaurant for a meal

Gen X
19% Go to a restaurant for a meal

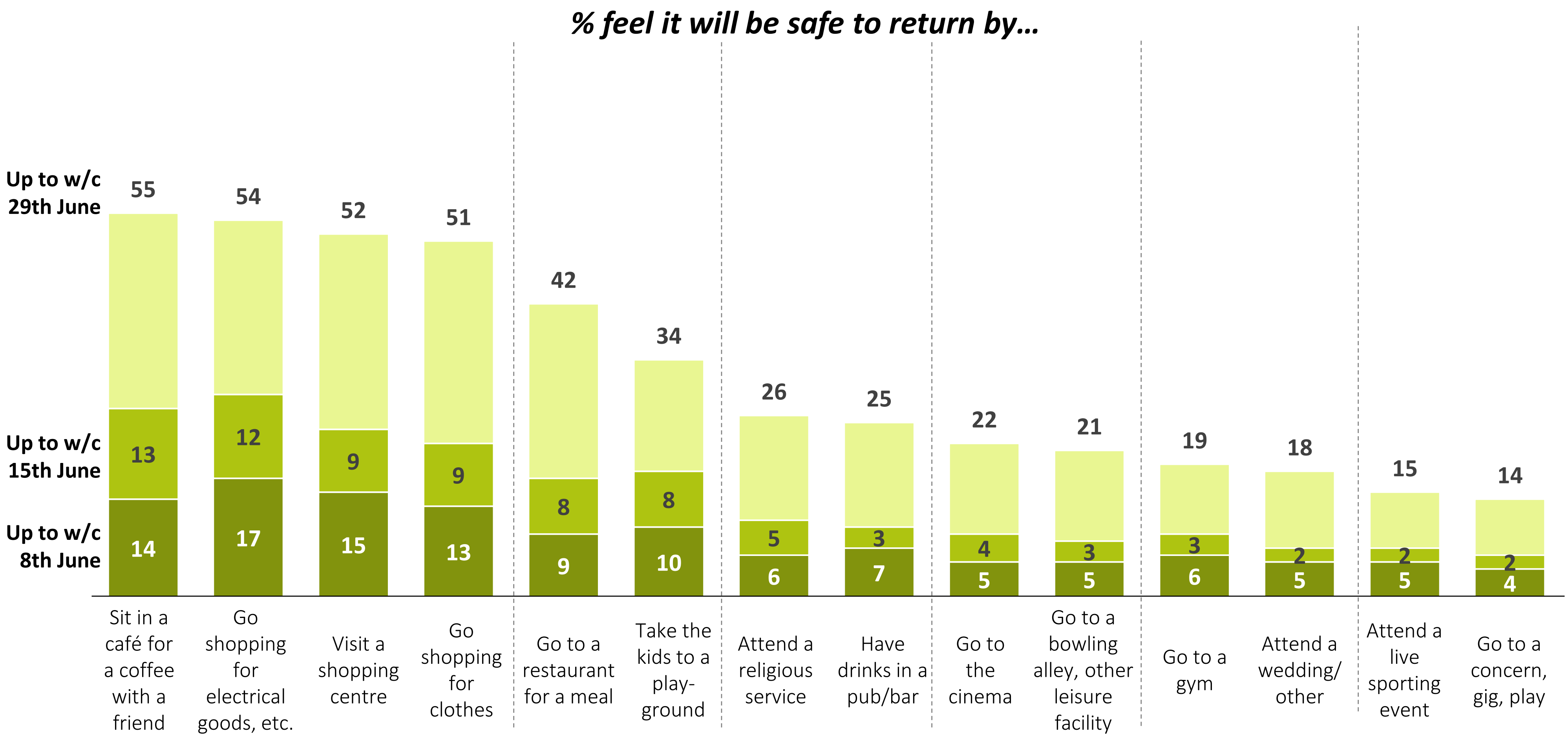
Baby Boomers
22% Sit in a café for a coffee with a friend

Silent Gen
20% Go to a restaurant for a meal

When will we feel it’s safe to return?

It would appear we feel safer returning to cafés and shopping sooner than other activities

Base: All adults aged 16+: 2,833/3,839,000



More than half would be ready to go to a café, go shopping for electrical goods or clothes and/or to visit a shopping centre by the week of 29th June. Meanwhile, 2 in 5 would be ready to visit a restaurant while only a quarter would be ready to return to the pub.

Q. Using the timeframe provided, could you please tell us when you feel you would comfortable enough to do each of the following activities?

Gen Z feel more comfortable returning to most things by 29th June, while Millennials over index on shopping, visiting the playground or some kind of leisure centre, as well as hitting the gym

Base: All adults aged 16+: 2,833/3,839,000



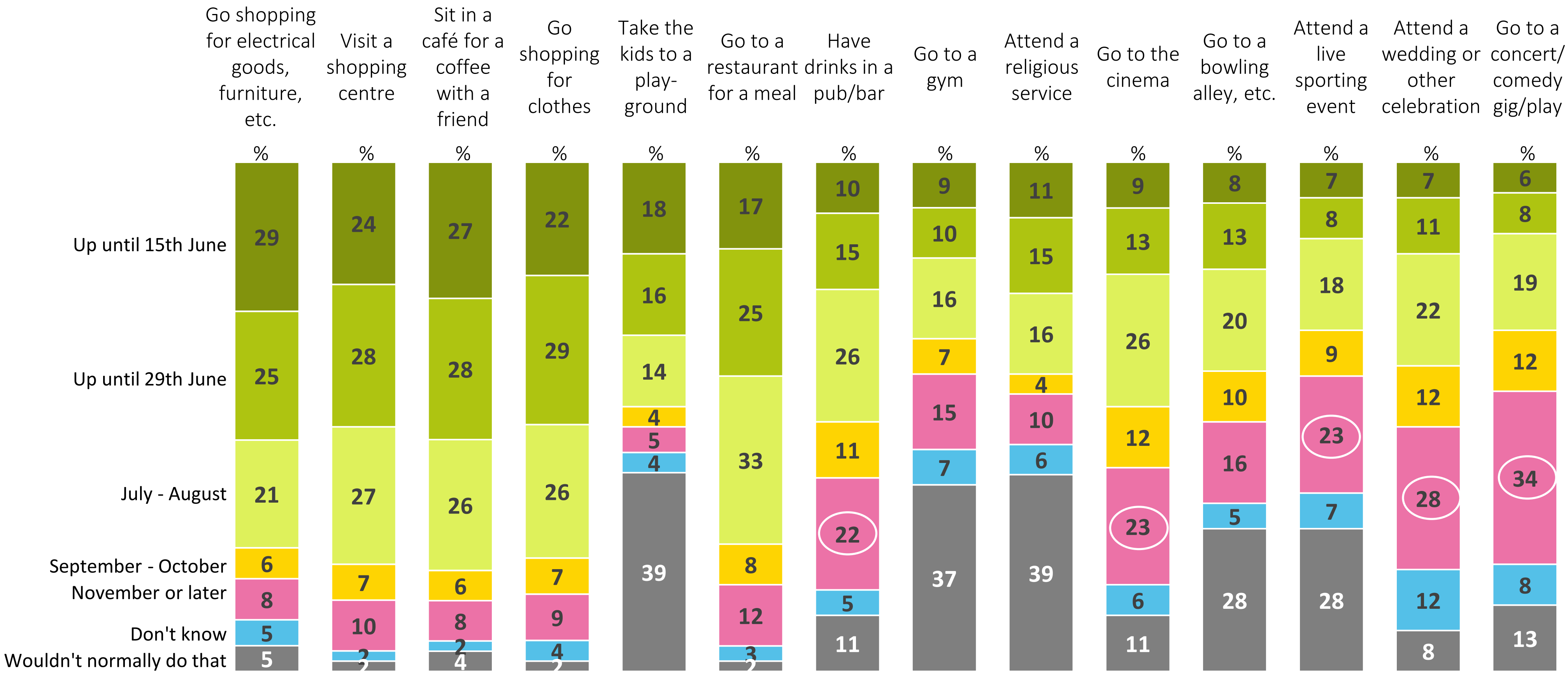


% would be comfortable to do by 29th June	All Adults	Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
Base:	*2833*	*71*	*1257*	*781*	*676*	*48*
	%	*%*	*%*	*%*	*%*	*%*
Sit in a café for a coffee with a friend	55	60	51	54	58	56
Go shopping for electrical goods, furniture, etc.	54	62	58	59	45	45
Visit a shopping centre	52	50	51	56	52	44
Go shopping for clothes	51	47	54	56	48	40
Go to a restaurant for a meal	42	47	43	43	40	40
Take the kids to a playground	34	36	40	38	24	29
Attend a religious service	26	28	20	26	30	31
Have drinks in a pub/bar	25	33	26	25	23	22
Go to the cinema	22	34	25	25	14	10
Go to a bowling alley, arcade or other leisure facility	21	31	26	21	13	13
Go to a gym	19	27	23	19	12	10
Attend a wedding/ christening or other celebration	18	30	19	21	12	12
Attend a live sporting event	15	22	16	17	12	5
Go to a concert/ comedy gig/play	14	30	12	15	8	15

Q. Using the timeframe provided, could you please tell us when you feel you would comfortable enough to do each of the following activities?

The vast majority feel it will be safe to return to shopping centres, cafés and restaurants by August if not sooner

Base: All adults aged 16+: 2,833/3,839,000

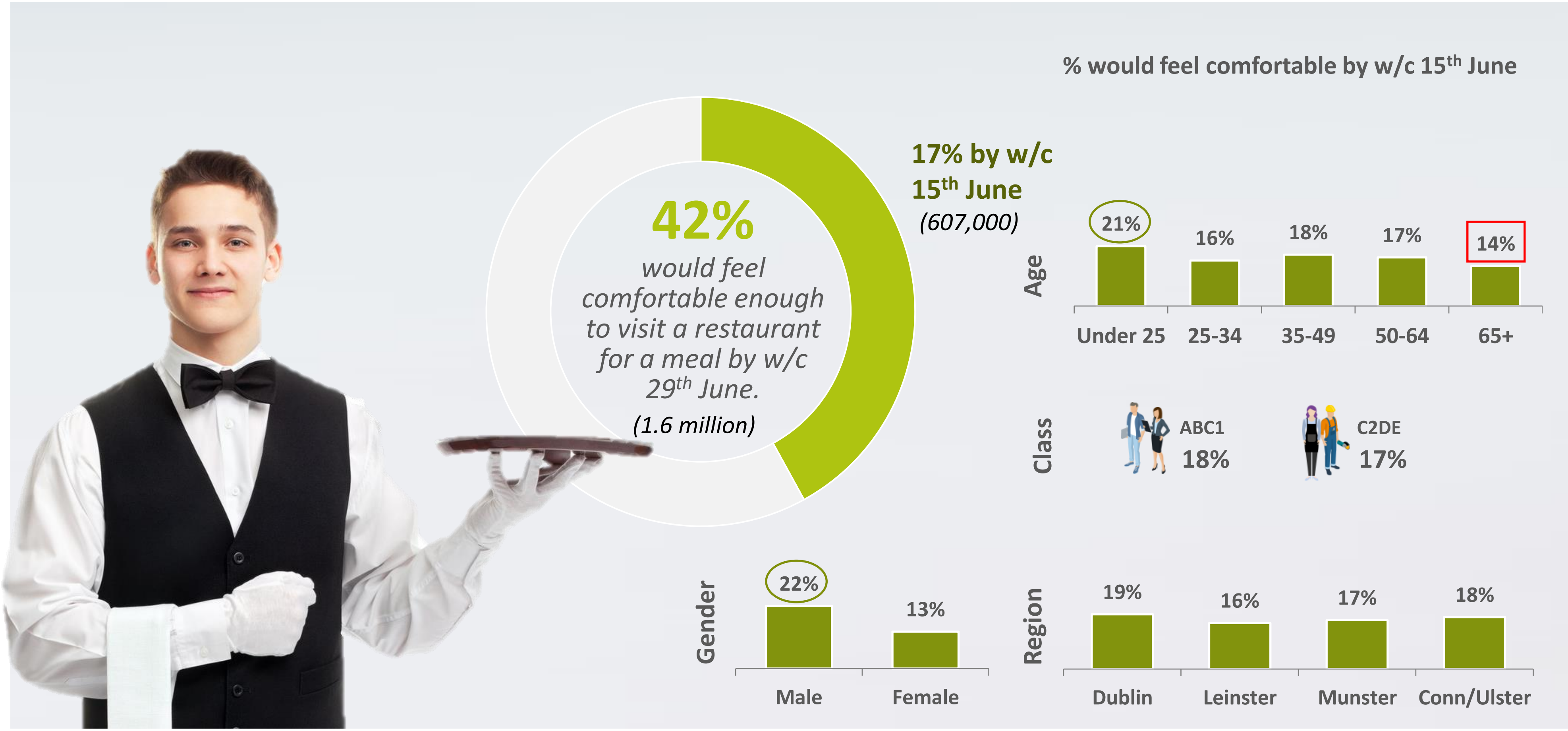


More than a fifth feel it won't be safe to return to a pub/bar or the cinema until at least November, while just over a third (34%) would not consider a gig/concert/play until then either.

Q. Using the timeframe provided, could you please tell us when you feel you would comfortable enough to do each of the following activities?

2 in 5 would feel comfortable to return to a restaurant by w/c 29th June, while 17% would be happy to go back on the week of the 15th.

Base: All adults aged 16+: 2,833/3,839,000



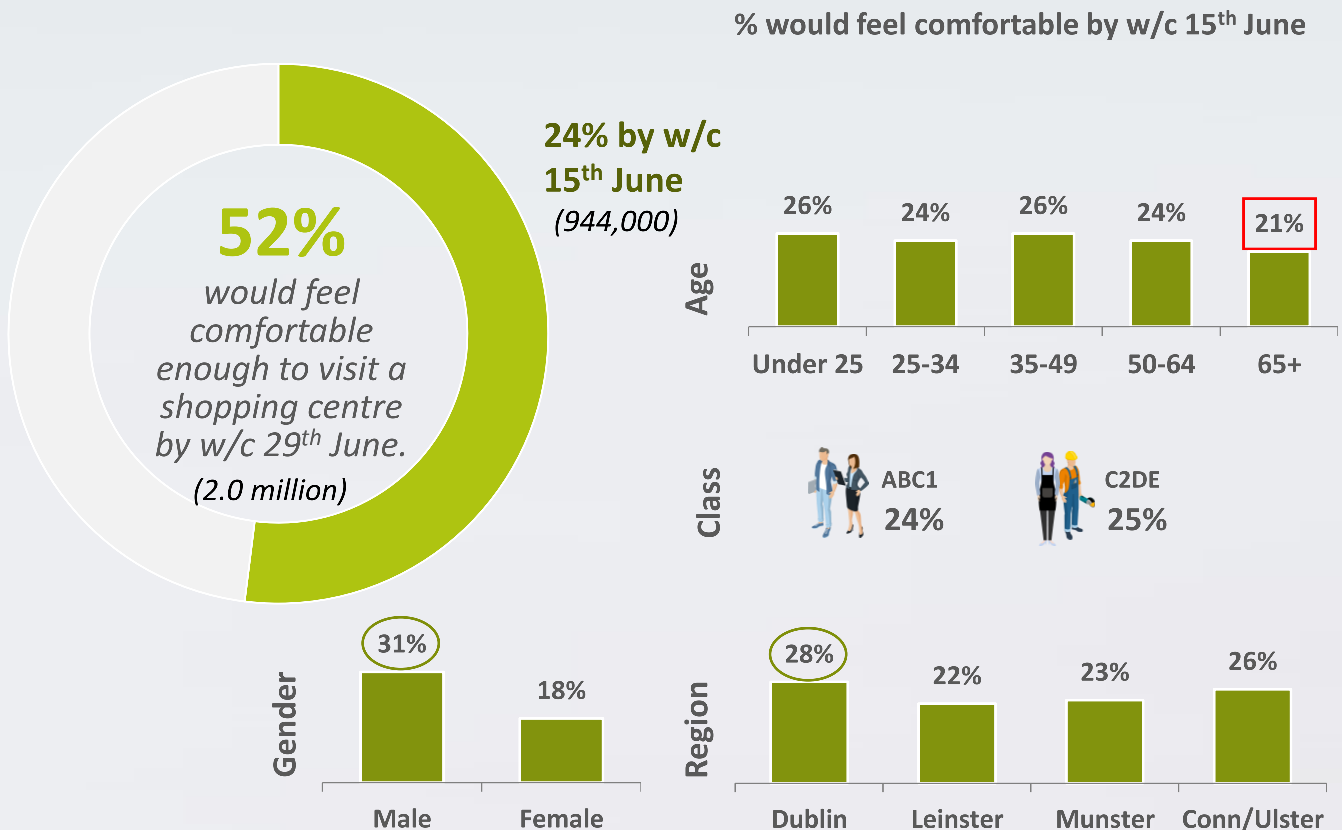
(Population estimates)

Men and those aged under 25 are more inclined to say they would feel comfortable to return by the week of the 15th June. Little difference by social class or region.

Q. Using the timeframe provided, could you please tell us when you feel you would comfortable enough to do each of the following activities?

Half of adults would feel comfortable enough to visit a shopping centre by w/c 29th June, while a quarter would be willing to return by 15th June.

Base: All adults aged 16+: 2,833/3,839,000



(Population estimates)

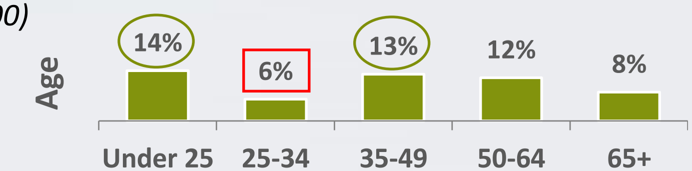
While little difference by age or social class, those in Dublin and men (in particular) are much more likely to feel comfortable returning to a shopping centre by the week of 15th June. Only 18% of women would indicate so in comparison with 31% of men.

Q. Using the timeframe provided, could you please tell us when you feel you would comfortable enough to do each of the following activities?

A quarter of adults would feel comfortable to return to a pub/bar for drinks by w/c 29th June, while 1 in 10 would be willing to do so by 15th June.

Base: All adults aged 16+: 2,833/3,839,000

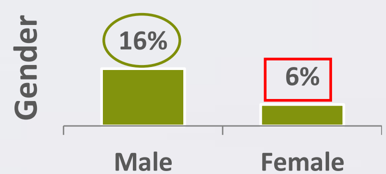
% would feel comfortable by w/c 15th June

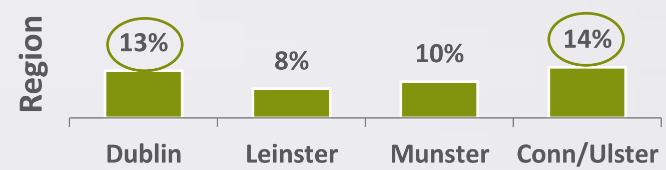


Class

ABC1 12%

C2DE 10%





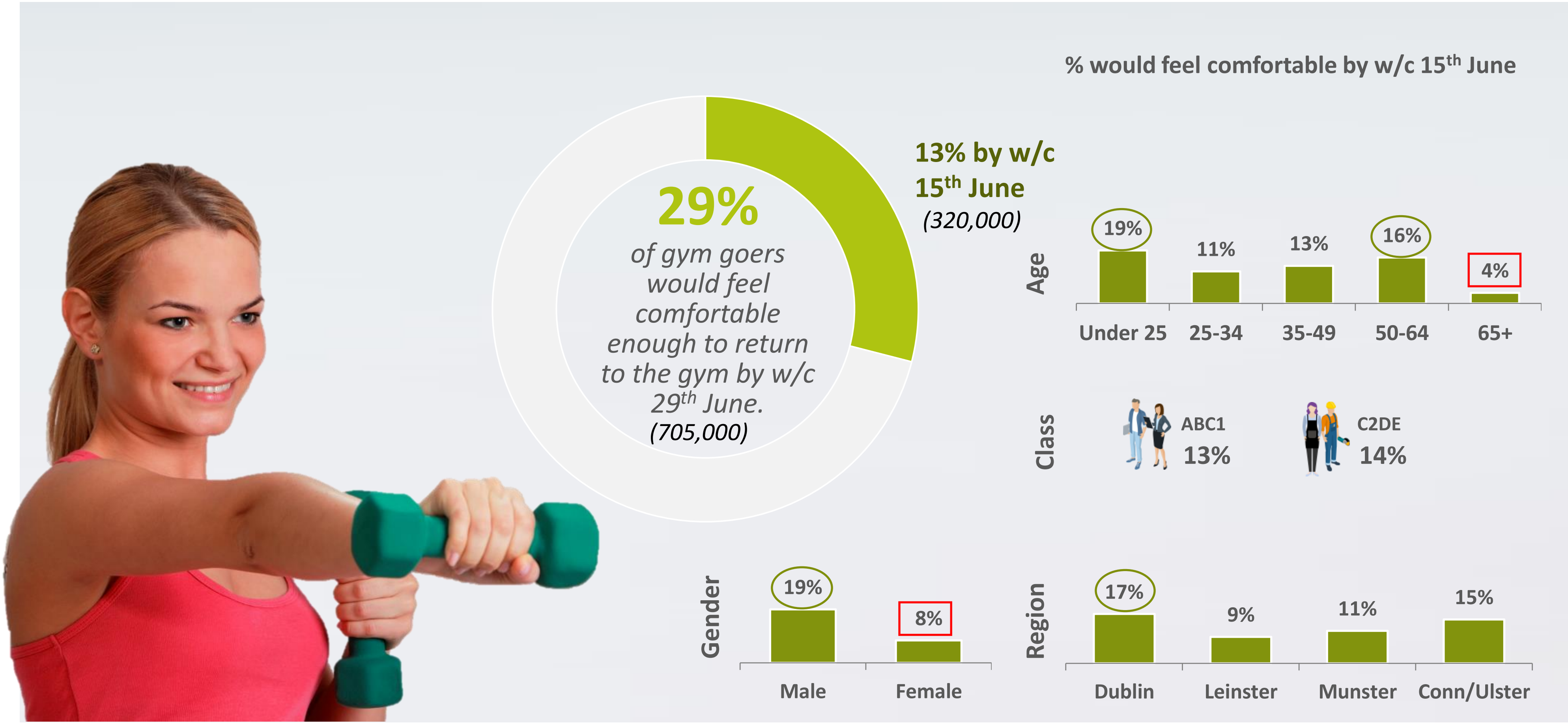
(Population estimates)

Men, under 25s and 35-49s, those in Dublin and Connacht/Ulster and men (in particular) are the more likely to claim they would be comfortable to return to a pub/bar by 29th June. Meanwhile, women and those aged 25-34 are less likely to feel comfortable enough to do so.

Q. Using the timeframe provided, could you please tell us when you feel you would comfortable enough to do each of the following activities?

Almost 3 in 10 gym-goers would feel safe enough to return by 29th June, while 13% would be happy to return by 15th June.

Base: All adults aged 16+ who would ever go to the gym



(Population estimates)

Men, under 25s, 50-64s and those in Dublin are the more likely to claim they would be happy to return to the gym by 15th June.

Q. Using the timeframe provided, could you please tell us when you feel you would comfortable enough to do each of the following activities?

Holidays!

More than a quarter (27%) of us are hoping to get abroad later this year.

The majority (62%) are planning a holiday either home or abroad this year

Base: All adults aged 16+: 2,833/3,839,000

Interestingly, the Silent Gen are the most likely to be postponing their holiday in the hopes of getting abroad later this year.

Hoping to holiday abroad later in the year x Generation

Gen Z 25%

Millennials 28%

Gen X 25%

Baby Boomers 28%

Silent Gen 32%

Q. Thinking of holiday plans, and looking further into the future when it safe to do so, which of these comes closest to your plans?

Summary

Highlights

1. **Millennials appear to have been the cohort most impacted by job losses, pay cuts and reduced hours.**
2. **Social activities are the ones we are most looking forward to doing once its safe to do so: going for a meal in a restaurant (19%), sitting in a café with a friend (16%) or going for a drink in a pub/bar (14%).**
3. **Younger adults are looking forward to doing more than things and are more likely to be comfortable doing each within the next month than older adults.**
4. **Attitudes between men and women differ greatly in terms of comfort returning to restaurants, pubs, shopping centres and other venues which have been closed since the beginning of lockdown. Men are much more likely to feel it will be safe to return in the next couple of weeks, whereas women are more cautious.**
5. **More than a quarter of us have postponed holidays in the hopes of going abroad later this year (27%). Men, the middle class and Dubliners the most inclined to indicate this.**

About B&A

- B&A is Ireland's largest and most experienced independently owned research company.
- We pride ourselves on having the most experienced director team in Ireland.
- Established over 30 years ago, Behaviour and Attitudes provides a full range of market research services, ranging from CAPI, CATI, online and of course qualitative.
- Specialist sectors include: Retail & Shopper, Technology & Telecoms, Media, Financial, Political & Social, Automotive, Healthcare and Public Sector & Utilities.

For more information please visit our website at: www.banda.ie or contact us on +353 1 2057500

Marketing Society Research Excellence Awards 25 time award winners, including 5 Grand Prix in 11 years.

B&A research services during Covid-19

B&A

B&A Online Omnibus Survey
A twice monthly omnibus survey amongst a representative sample of 1,000 adults aged 16 years plus. Surveys costed on a per Question Unit basis.

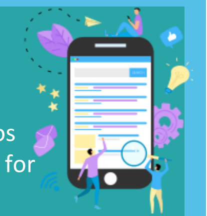
Virtual Focus groups
Focus groups conducted via an online platform that respondents log on to. Fully audio and visually enabled allowing us to moderate via camera, interact with respondents in real time, show all manner of stimulus and interactive tools and observe their responses at first hand.

B&A online Acumen Panel service
Access to the full breadth of ad hoc quantitative research applications, via our online panel of 30,000 + consumers. From fully representative nationwide surveys, to smaller surveys amongst niche markets and audiences.

Online Forums
Collaborative virtual discussion space where we interact with participants over a 3-5 day period. Respondents can be shown stimulus, asked to comment on various topics and material and probed on their answers. Respondents can comment on each other's answers and react, build, question.

B&A Online Client/Customer Surveys
Gauge accurate and timely feedback from your own customer base by way of carefully designed CEX, Communications, Client needs etc surveys. All conducted to the highest levels of GDPR compliance.

Online digital ethnography
Respondents use mobile devices to answer our questions and show us their world. We have our own digital ethnography app for this purpose, allowing respondents to capture answers to our questions in the form of video, photos and text responses. Our moderators are on hand to follow up 24/7, probing for more info, clarifying points and setting new challenges.



B&A CATI Unit
B&A continues to provide a full suite of Consumer and Business to Business Telephone research applications through our panel of CATI-At-Home interviewers across the country.

Virtual depth interviews
In depth interviews with research participants, conducted in the comfort of own homes. We use a variety of platforms such as Skype, Zoom, Teams to talk to participants easily, watch their non verbal response, show stimulus and interact on a personal level.

For further information contact any of our senior research team:
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Thank you.

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Delve Deeper