



RESEARCH
& INSIGHT

Reopening Ireland:

Public Sentiment Survey Phase II

 @banda_ie

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 Behaviour & Attitudes

July 2020

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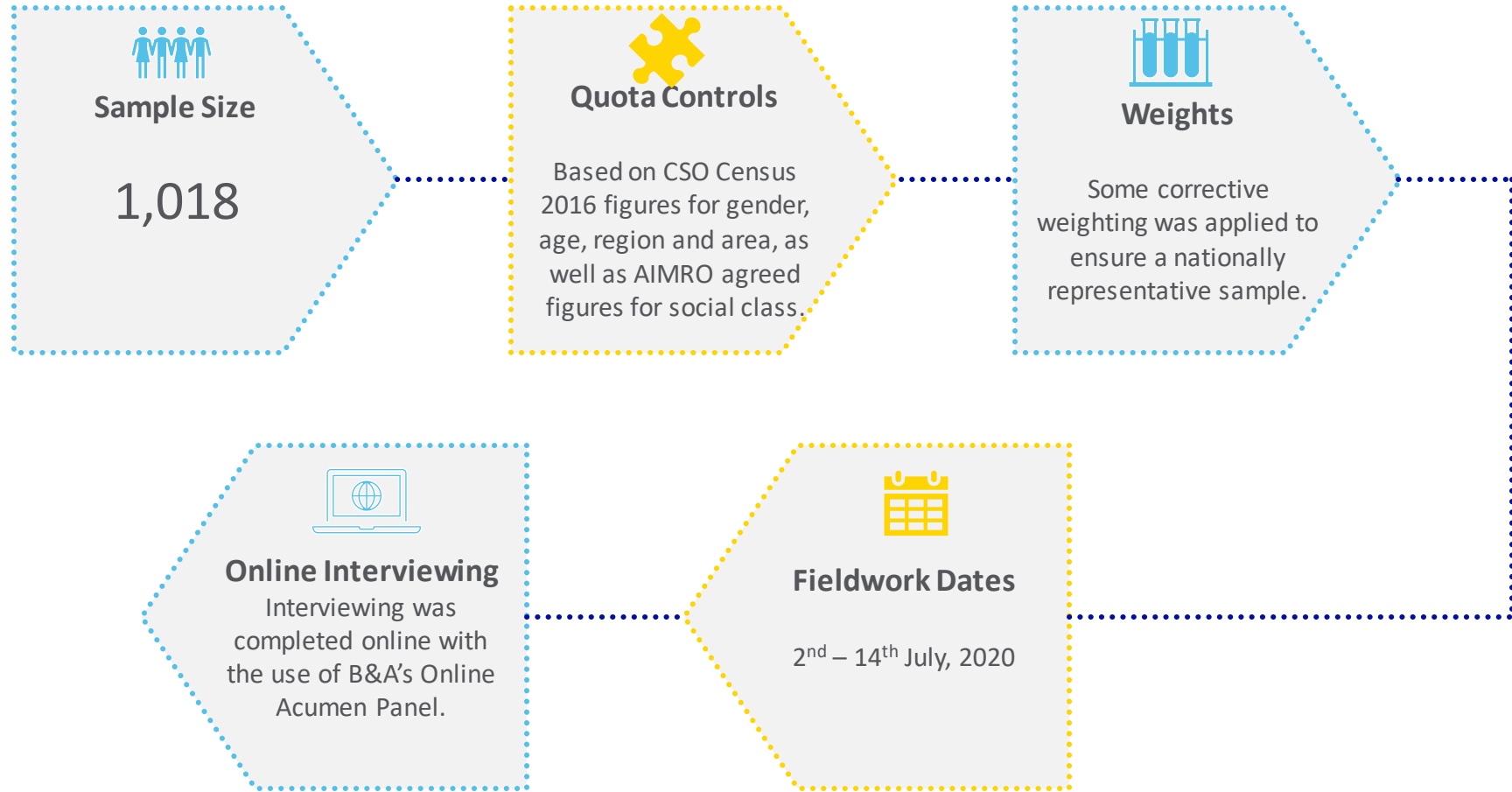
Introduction

- This report details the findings of the most recent wave of B&A's *Reopening Ireland* study.
- This short survey, asked of a nationally representative sample of adults aged 16+, is designed to understand how consumers are feeling about returning to non-essential businesses: what are they looking forward to and when do they feel it will be safe to return.
- Our first wave of the study was undertaken at the start of June, 3 weeks before restaurants and shopping centres reopened. This wave was fielded at the beginning of July, 2 weeks before we were due to move into Phase 4 of the Government's plan seeing the opening of pubs (which has now been deferred).



Methodology

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



Contents

- What are we looking forward to?
- When will we feel it is safe to return?
- When do we feel we will get back to a 'normal' way of life?
- Summary

WE ARE

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What are we most looking forward to?

Although shopping centres have been open for a month, 28% are still looking forward to visiting one.

(had been 36% in June)

Other activities we are looking forward to

Base: All adults aged 16+: 1,018/3,839,000



Top activity looking forward to at all x Age Group



Under 25s

54% Go to a restaurant for a meal



25-34s

54% Go to a restaurant for a meal



35-49s

41% Go to a restaurant for a meal



50-64s

44% Go to a restaurant for a meal



Over 65s

50% Go to a restaurant for a meal



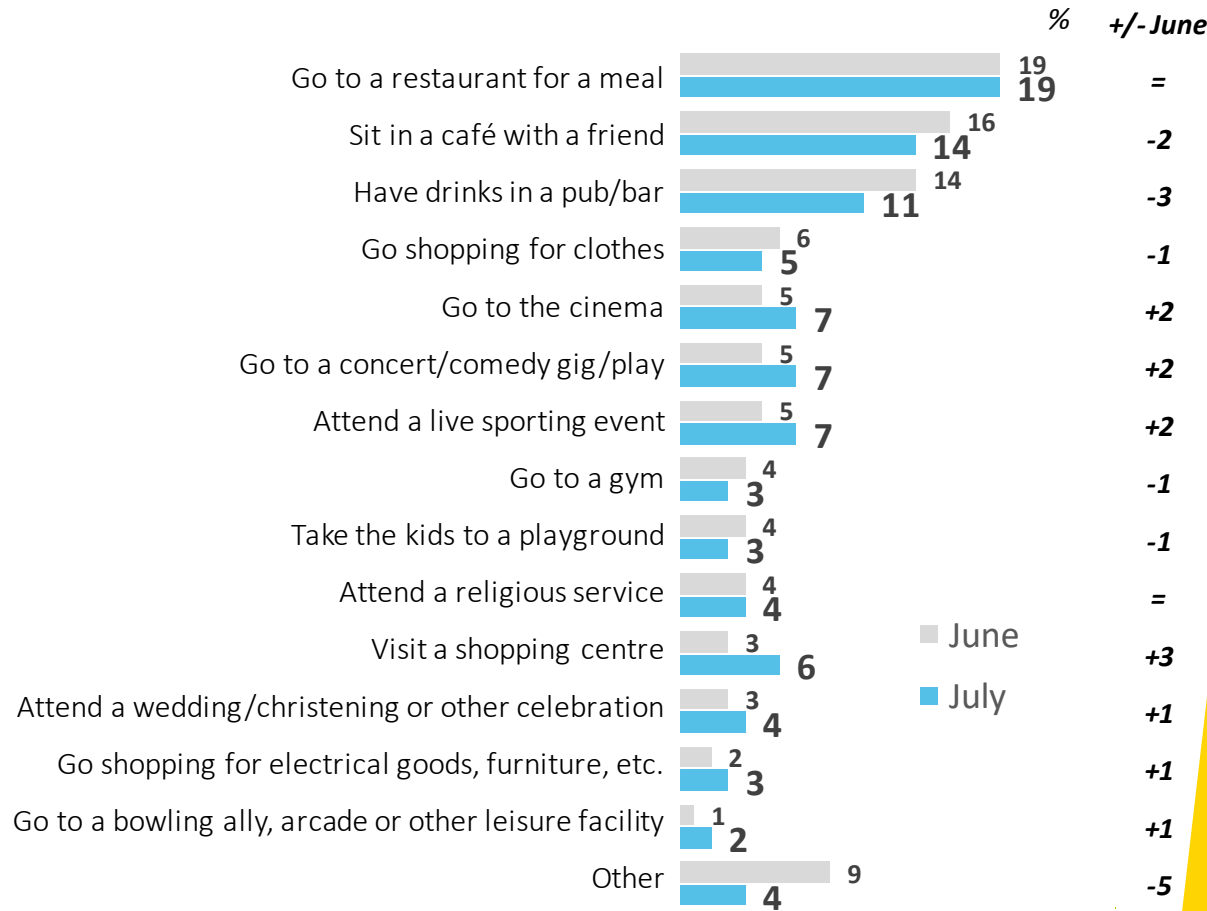
As we move through the plan and more activities are permitted, we will be looking forward to fewer things. For example, 36% of adults were looking forward to visiting a shopping centre in June: this has reduced to just 28% one month after these premises reopened.



A woman with long blonde hair, wearing a black top, is shown in profile from the chest up, holding a white plate of food. The plate contains a slice of toasted bread, a roasted tomato, a piece of fish, and some dark vegetables. In the background, another woman with dark hair, wearing a yellow top, is seated at a table. The setting is a restaurant with a stone wall and a lit candle.

What we are most looking forward to

Base: All adults aged 16+: 1,018/3,839,000



There seems to be a wider range of activities on the radar for people in July than was the case in June.

Activity most looking forward to x Age Group



Under 25s
17% Have drinks in a pub or a bar



25-34s
16% Go to a restaurant for a meal



35-49s
17% Go to a restaurant for a meal



50-64s
22% Go to a restaurant for a meal



Over 65s
26% Go to a restaurant for a meal



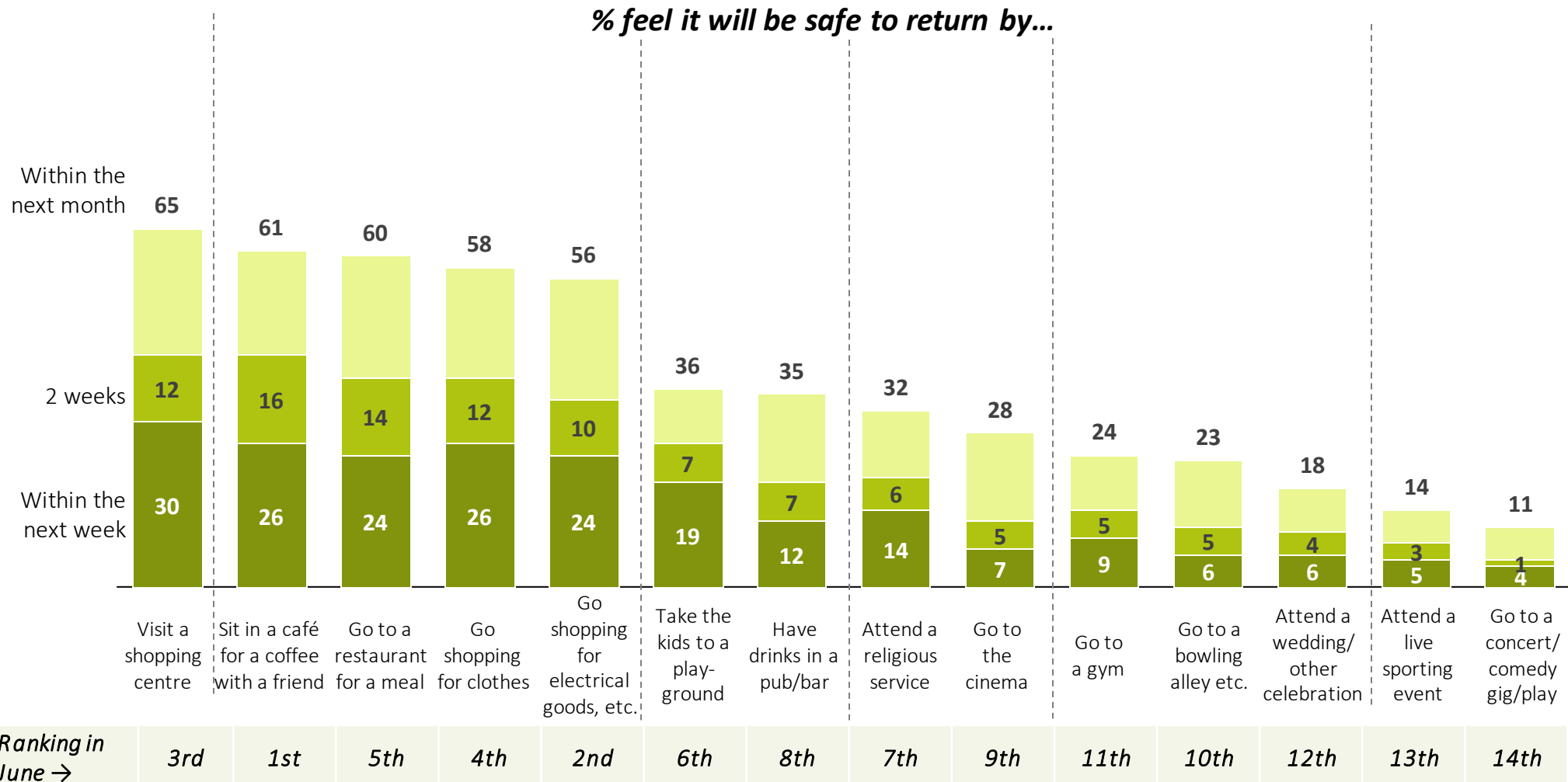
Q. And which of the following activities are you most looking forward to doing once you feel it will be safe to do so?



**When will we feel it's safe
to return?**

More than half feel it will be safe enough to go shopping, sit in cafés or visit a restaurant within the next month

Base: All adults aged 16+: 1,018/3,839,000



While a sense of caution remains among many consumers, particularly older adults, we do see encouraging signs that people are ready to return to the activities they have missed since March.

Encouraging signs in terms of confidence returning to a number of places of business: more now comfortable going to restaurants, pubs and shopping centres within the next week than was the case in June.



Base: All adults aged 16+: 1,018/3,839,000



Far fewer feeling it will be safe to return to various activities in or by August this month than we saw last month.

Younger adults are much more likely to feel safe enough to return to each activity by 20th July than older adults.

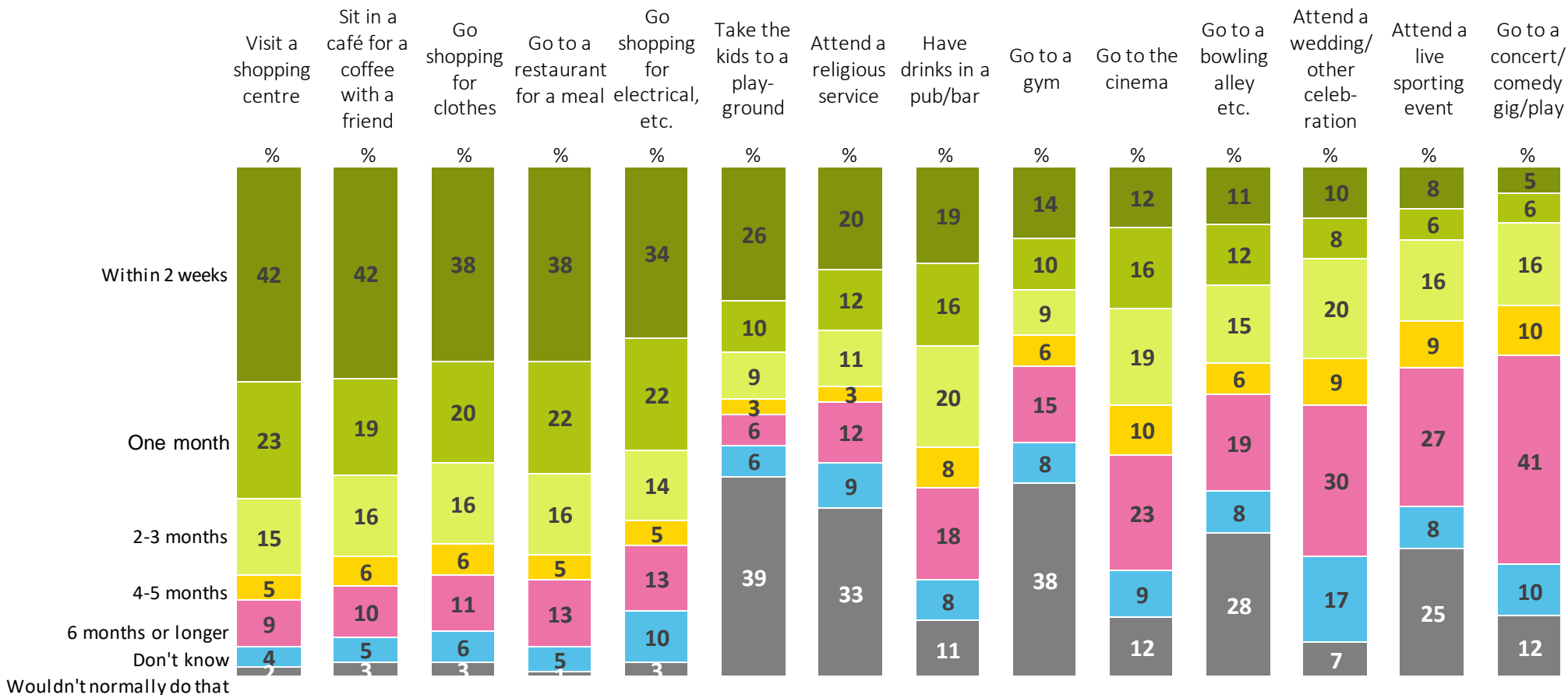
Base: All adults aged 16+: 1,018/3,839,000



% would be comfortable to do within next 2 weeks (by 20 th July)	All Adults	Under 25	25-34	35-49	50-64	65+
<i>Base:</i>						
	%	%	%	%	%	%
Sit in a café for a coffee with a friend	42	68	44	36	38	36
Visit a shopping centre	42	60	42	43	35	34
Go to a restaurant for a meal	38	56	45	36	30	30
Go shopping for clothes	38	58	45	40	34	21
Go shopping for electrical goods, furniture, etc.	34	51	42	32	30	18
Take the kids to a playground	26	31	31	37	16	15
Attend a religious service	20	25	13	17	20	29
Have drinks in a pub/bar	19	32	27	17	14	12
Go to a gym	14	35	20	10	8	4
Go to the cinema	12	28	19	10	5	3
Go to a bowling alley, arcade or other leisure facility	11	25	17	11	5	4
Attend a wedding/ christening or other celebration	10	16	13	9	6	4
Attend a live sporting event	8	12	10	6	8	3
Go to a concert/ comedy gig/play	5	10	9	5	4	2

Once again we see that larger events, such as sporting events and concerts, are not seen to be safe until much later this year at the earliest

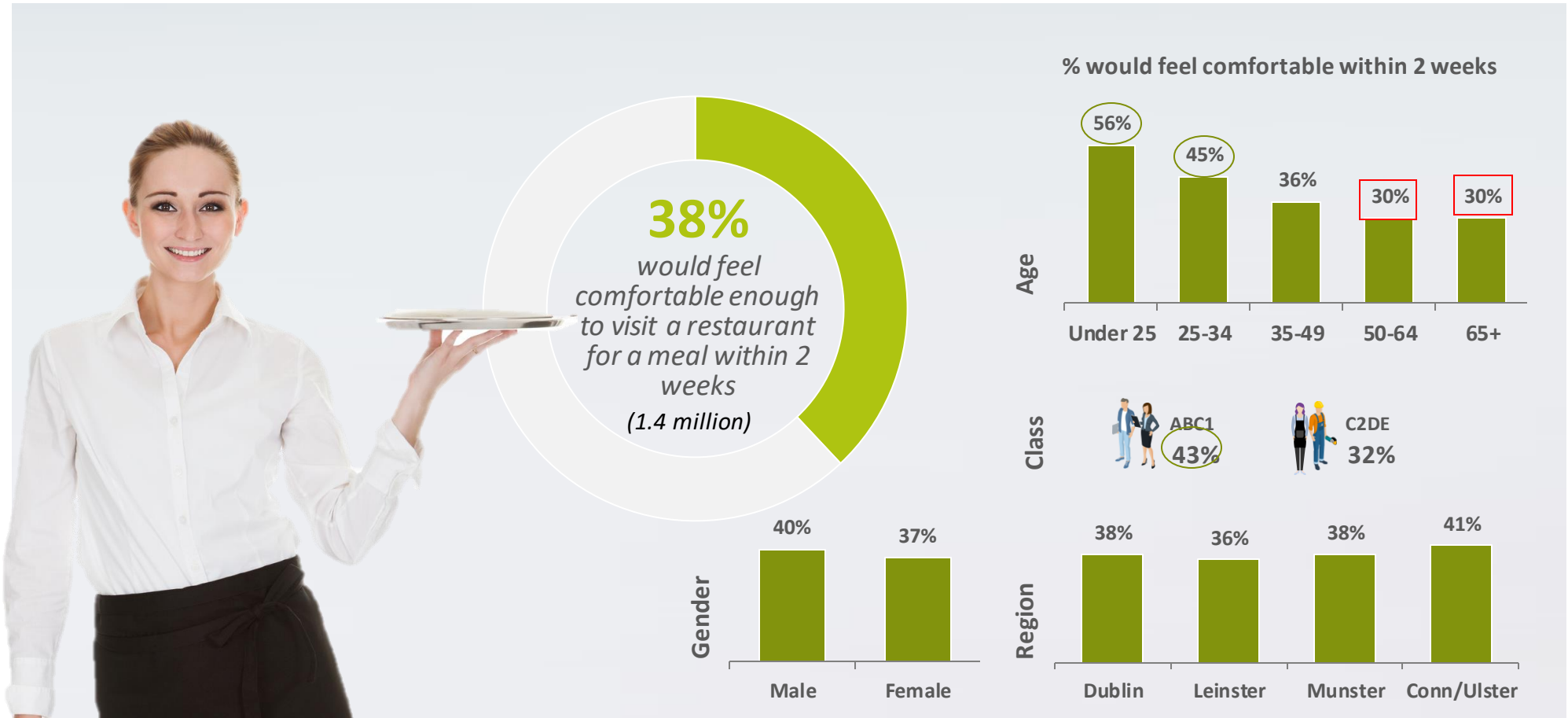
Base: All adults aged 16+: 1,018/3,839,000



2 in 5 (41%) feel it won't be safe to return to a concert or gig until December or later, while 3 in 5 (30%) have a similar timeframe in mind for weddings/other celebrations.

Almost 2 in 5 (38%) would feel safe enough to return to a restaurant within two weeks

Base: All adults aged 16+: 1,018/3,839,000

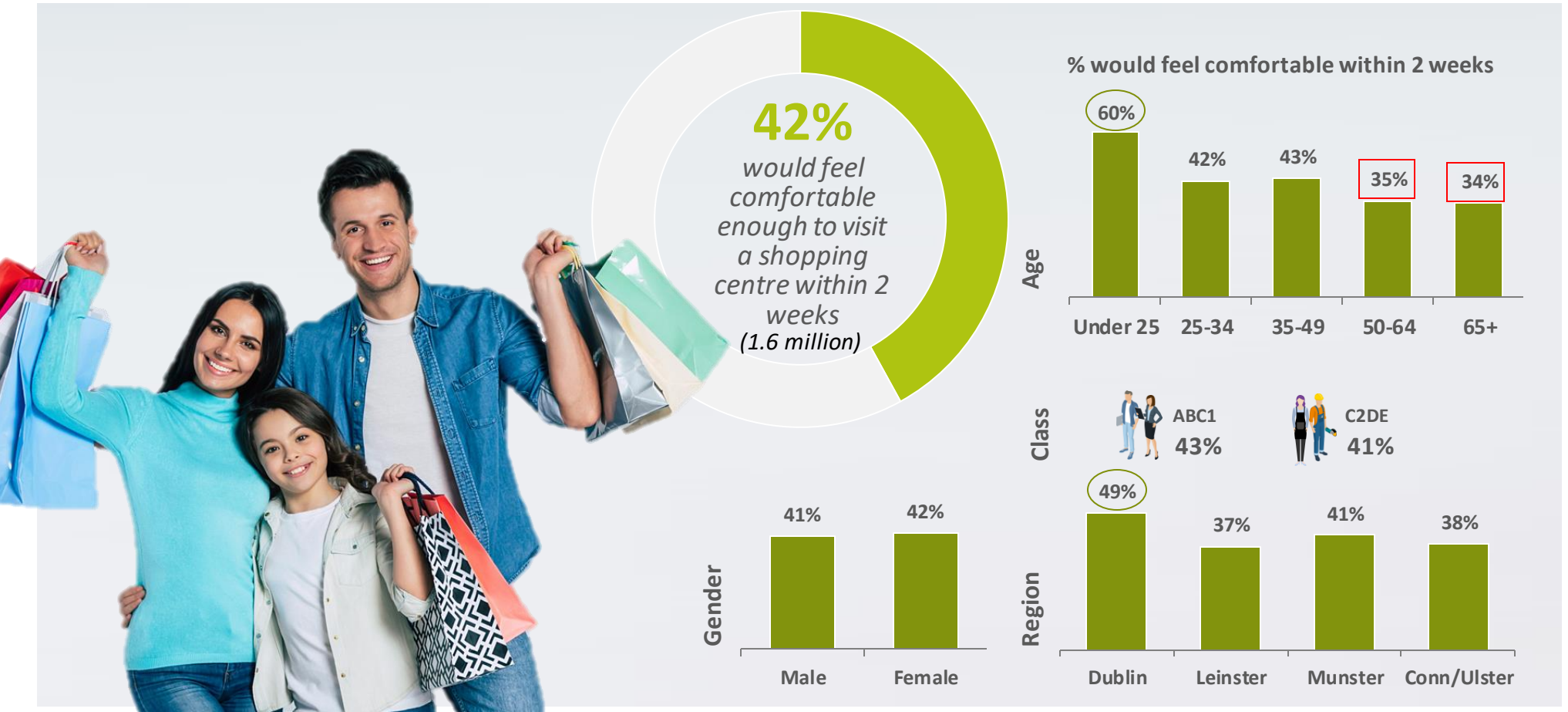


(Population estimates)

Younger adults are much more likely to feel it is safe to return to restaurants within 2 weeks, as are the middle class. Less of a difference by gender or region.

Perceived safety of returning to shopping centres is much stronger among the under 25s: 3 in 5 of whom feel comfortable returning within 2 weeks

Base: All adults aged 16+: 1,018/3,839,000



(Population estimates)

Half of Dubliners indicate they would feel safe enough to return by 20th July also, while those over the age of 50 are much more likely to be cautious.

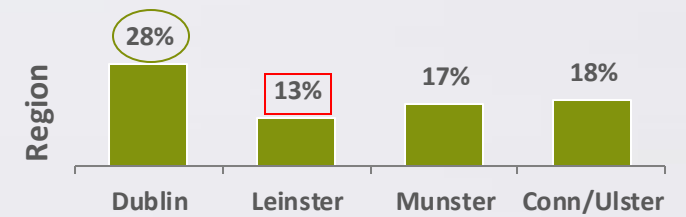
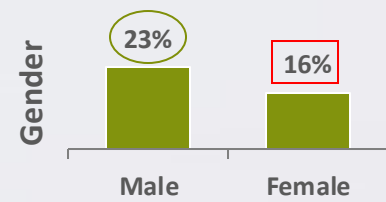
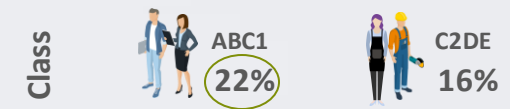
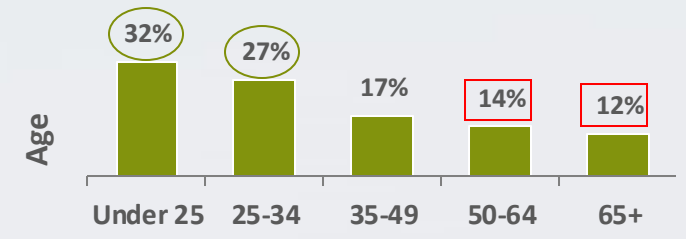
A fifth feel that it will be safe enough to return to pubs/bars within 2 weeks



Base: All adults aged 16+: 1,018/3,839,000



% would feel comfortable within 2 weeks



(Population estimates)

Men, younger adults, the middle class and those in Dublin are more likely to feel it will be safe enough to return to pubs by 20th July. Less of a gap between male and female attitudes this wave than we saw last month.



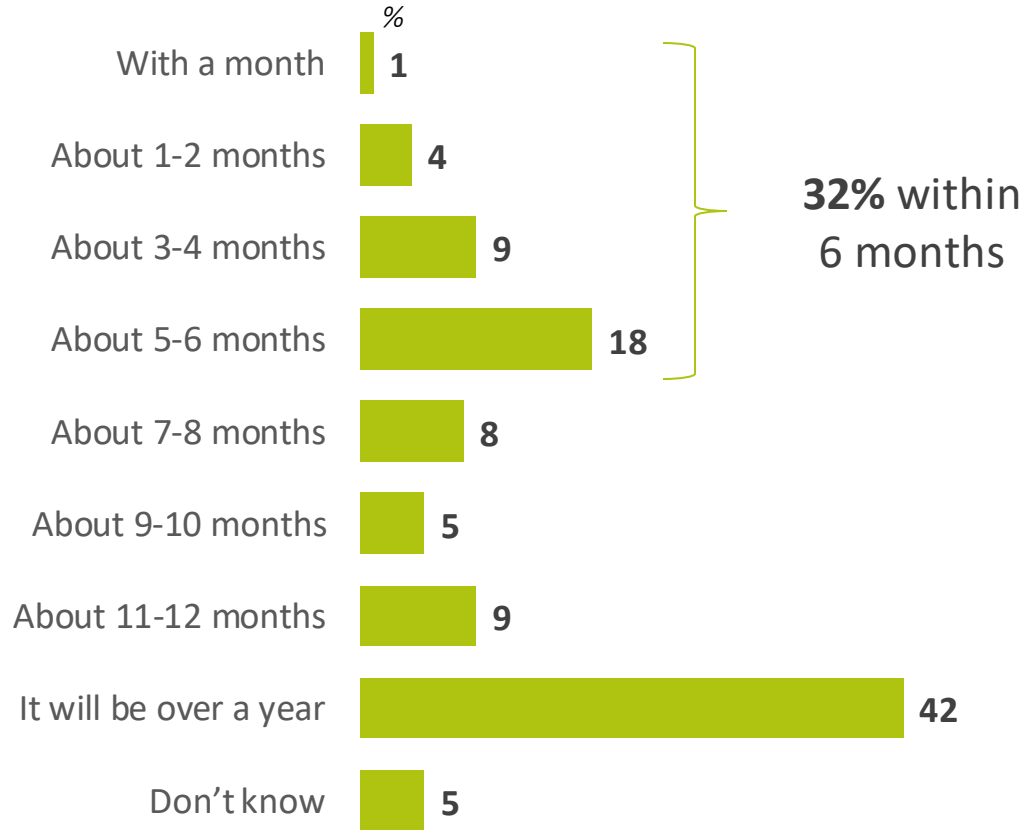
New normal

When we feel we will return
to a 'normal' way of life

***2 in 5 (42%) feel
it will take more
than a year to
get back to
some sort of
'normal' life.***

2 in 5 feel it will take a year, while 32% are more optimistic feeling it will take 6 months or less to get back to some sort of 'normal' life

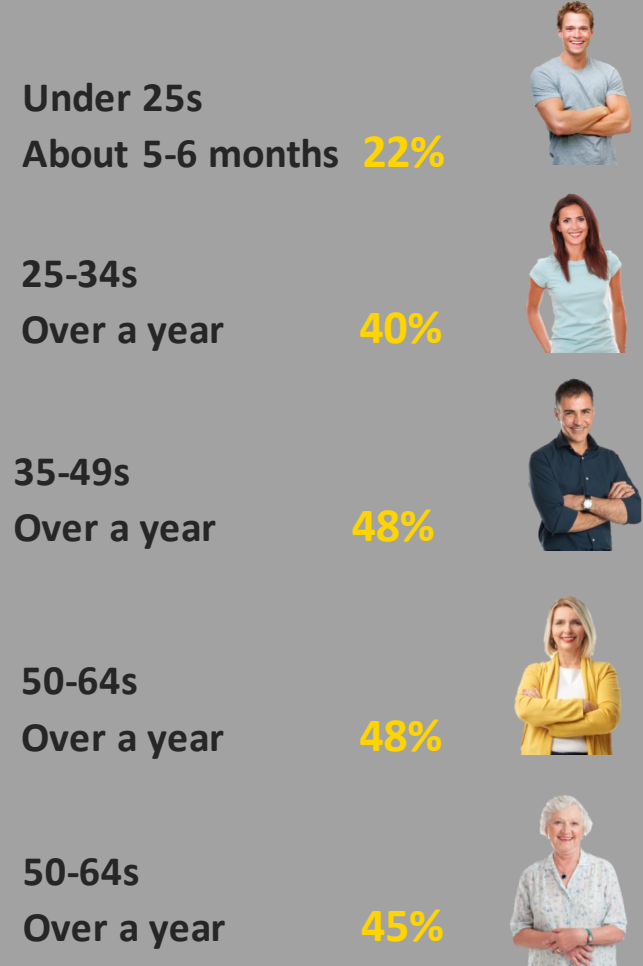
Base: All adults aged 16+: 1,018/3,839,000



Under 25s are more likely to feel things will be back to some sort of normality quicker than others.

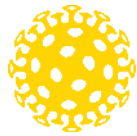


When each age group most likely to feel things will return to 'normal'...





Summary



1. **Social activities** remain the ones we are **most looking forward to**. Overall, 48% are looking forward to going for a **meal in a restaurant**, 42% to going to a **café** and 34% to having drinks in a **pub/bar**.
2. As we move through the Summer, we do see **encouraging signs that consumers are becoming more comfortable** returning to activities they have been missing over the past 3 months. In fact we see significant increases in the proportion feeling safe enough to return to restaurants, pubs and/or shopping centres 'within the next week' in comparison with our June study.
3. Of course the perception of safety differs by age group, with **younger adults** (under 25s in particular) appearing **ready for life to re-start** within the next couple of weeks. However, those **over the age of 50** are much **more cautious**, with far fewer feeling that any activity will be safe enough to return to within the next two weeks.
4. And finally **2 in 5** Irish adults feel that it will be **at least a year** before we return to some sense of normality. Meanwhile, 32% feel this will happen within the next 6 months. Those **younger are more optimistic** than others, as two thirds of under 25s feel we will reach some sense of normal life within the next 8 months.

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
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in 11 years.*



B&A research services during Covid-19



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.



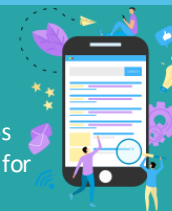
B&A Online Client/Customer Surveys

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