The Changing Covid Landscape

As Lockdown Eases

September 2020

Cognisense Omnibus
Methodology & Sample

• Objectives of the survey were to understand behavioural and attitudinal trends within the Northern Ireland population during the pandemic.

• Survey conducted as part of the Cognisense Northern Ireland Omnibus Survey.

• Fieldwork conducted via an online methodology between 11th – 31st August 2020.

• Total sample of $n=1,045$ respondents.
  • Sample representative of the Northern Ireland adult (16+) population in terms of age, sex, socio-economic grouping and area.
  • Figures in charts are %s of the full base unless otherwise stated.

• All research conducted in accordance with the Market Research Society ethical Code of Conduct.
Demographic Profile

Base: All Respondents n=1,045

- Male: 49%
- Female: 51%

- 16-24: 14%
- 25-34: 17%
- 35-49: 25%
- 50-64: 24%
- 65+: 21%

- ABC1: 45%
- C2: 26%
- DE: 30%

- Belfast City: 23%
- North of the Province: 15%
- South of the Province: 36%
- West of the Province: 26%

- Greater Belfast: 42%
- Rest of NI: 58%
Highlights

• 9 in 10 (90%) of the adult population in NI have worn facemasks in shops.
  • Over 1 in 10 (12%) claim to have a medical condition that exempts them from wearing a face mask, a trend more prevalent amongst 35-49’s and those in the DE socio-economic grouping.
• 60% of adults have eaten out in a restaurant, café, coffee shop or pub.
• 39% have benefited from the eat out to help out scheme.
• Almost half (48%) of those currently working from home do not expect to return to their place of work until 2021.
• Over a third (34%) of those currently working or furloughed are not confident about their job security over the next 6 months.
• Over two thirds (68%) have not taken a day trip, holiday or short break over the past 2 months, a trend most prevalent amongst older adults.
• Two thirds (66%) are definitely not considering taking a holiday in mainland Europe or further afield in the next three months.
  ➢ 51% also not considering holiday / short break in GB over same period
  ➢ 44% not considering the same in RoI.
• Over 2 in 5 (42%) adults would have preferred lockdown restrictions to have been kept tighter for longer.
  ➢ In contrast, similar proportions (43%) are content with the current pace of easing restrictions.
• Almost half (48%) of parents content with children going back to school 5 days a week, however the majority (63%) are nervous about children contracting COVID 19 when back at school.
• Over 7 in 10 (71%) parents claim the amount of time kids have spent on electronic devices has increased during COVID. The vast majority now have intentions of limiting their game time.
Since the beginning of July, which, if any, of these have you done?

- Worn a face covering in a shop: 90%
- Met with friends or relatives in your, their garden, other open area: 75%
- Met with friends or relatives inside your, their home: 70%
- Been to a restaurant, café, coffee shop or pub to eat: 60%
- Been to a drive thru fast food restaurant or got a take out: 54%
- Worn a face covering when walking about outdoors: 51%
- Been to the hairdressers barbers: 48%
- Have stockpiled certain items in case there is another lockdown: 23%
- Stayed overnight in a hotel, B&B or Guesthouse or Airbnb: 18%
- Stayed overnight in a holiday home, caravan, motorhome, tent: 15%
- Been to a pub for a drink without having to order food: 15%
- Played an outdoor sport e.g. golf, tennis: 12%
- Attended an open air event (including sports): 7%
- None of these: 2%

Survey conducted in August 2020, n=1045
The vast majority of the NI public had worn a face covering in a shop by the end of August. Interestingly, those who had been shielding were less likely to have worn a face covering in a shop than those who had not been shielding personally, but may have had someone within the household shielding. We were much less likely to have worn a face covering outdoors with only half the population having done this. Again, our instinct to protect others was strong with those living with someone who had been shielding most likely to have worn a face covering outdoors.

<table>
<thead>
<tr>
<th>Had been shielding</th>
<th>Worn in shop</th>
<th>Worn outdoors</th>
</tr>
</thead>
<tbody>
<tr>
<td>83%</td>
<td>56%</td>
<td></td>
</tr>
<tr>
<td>Someone in house was shielding</td>
<td>94%</td>
<td>66%</td>
</tr>
<tr>
<td>Not serious but clinically vulnerable</td>
<td>87%</td>
<td>42%</td>
</tr>
<tr>
<td>None of household vulnerable</td>
<td>92%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Since the beginning of July, which, if any, of these have you done?
August 2020 n=1045
Around 1 in 10 had a medical condition that meant wearing a face covering would not be possible. Those aged 35-64 and DEs were most likely to have such a condition.

Unable to wear mask due to medical condition n=112

- 16-24: 17%
- 25-34: 18%
- 35-49: 32%
- 50-64: 26%
- 65+: 7%
- ABC1: 28%
- C2: 19%
- DE: 53%

Do you have a medical condition that would mean wearing a face covering would not be possible?
August 2020 n=1045
Since the beginning of July, three quarters of us had met with family or friends in an outdoor space, with this type of meeting more prevalent among females than males. Seven in ten of us had taken advantage of the easing of restrictions by meeting people indoors.

Since the beginning of July, which, if any, of these have you done?
August 2020 n=1045
Socialising & Eating Out
Three fifths had eaten out since the start of July, while fewer (54%) had been to a drive thru. Fewer than a fifth of us had stayed away from home overnight. Only 15% claimed they had been to a pub for drinks only. Perhaps unsurprisingly, the shielders among us were less likely to have ventured out to partake in these activities, demonstrating a degree of caution was still being taken despite their recommend shielding period having come to a close on the 31st July.
Almost two fifths of the population had taken advantage of the Eat Out Help Out Scheme, with a quarter claiming it encouraged them to use a pub / restaurant. However 3 in 10 still did not feel comfortable visiting restaurants / pubs. This figure was highest among those aged 65+ (36%) and lowest among 16-24 year olds (17%).

- I have already used this: 39%
- I do not feel comfortable visiting restaurants / pubs: 30%
- It encourages me to use restaurant /pubs: 23%
- I do not want to eat out in the early part of the week (Monday to Wednesday): 14%
- I have not been able to get a booking as the restaurants / pubs have been fully booked: 8%
- I had not heard of this scheme before: 4%

The Government has introduced the Eat Out Help Out scheme which allows a restaurant to discount 50% of your sit in food and soft drink bill (up to a maximum of £10 discount per diner) every Monday, Tuesday and Wednesday between 3 and 31 August. as many times as you like. Which of these best describes your views on this scheme?

August 2020 n=1045
Grooming
Almost half of us had been to the hairdresser or barber since the beginning of January, with those who did not have anyone vulnerable in the household more likely to have visited. Again, those who had been shielding were on the side of caution with only 37% of them having visited a hairdressers at this stage.

Since the beginning of July, which, if any, of these have you done?
August 2020 n=1045

- Total Sample: 48%
- Had been Shielding: 37%
- Someone in the house was shielding: 47%
- Not serious but clinically vulnerable in the house: 46%
- None of household vulnerable: 52%
Just over 1 in 10 had played an outdoor sport since the beginning of July, with only 7% having attended an open air event.

Since the beginning of July, which, if any, of these have you done?
August 2020 n=1045
Work Circumstances
Among those still working from home, almost half understood it would be 2021 before they would return to their normal place of work. This was highest across ABC1s. Around a fifth expected to return this month. A minority felt they would never return to their usual working environment.
Reassuringly, almost 7 in 10 were confident in their job security over the next 6 months, but a fifth were still unsure and 14% claimed to be concerned.

Which of these describes your confidence in your job security over the next 6 months?

August 2020, Those working or furloughed n=639
Holidays & Short Breaks
Over the last 2 months the most popular breaks included day trip, holiday or short break locally, or to RoI. A small minority had ventured further afield. Almost 7 in 10 had not taken any such trips over the last 2 months, with older people less likely to have travelled than younger people.
Thinking about the next 3 months, Europe or further afield were destinations that were definitely not being considered by two thirds of the NI population. Just over half of us will not be visiting GB within the next 3 months, while over two fifths claimed they will not be visiting RoI for either a day trip or short break. Unsurprisingly there were fewer of us definitely ruling out a holiday or short break within NI.

### Definitely will not be taking such a trip

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A holiday in mainland Europe or further afield</td>
<td>66%</td>
</tr>
<tr>
<td>A holiday or short break or day trip to somewhere in GB (England Scotland or Wales)</td>
<td>51%</td>
</tr>
<tr>
<td>A holiday or short break in the Republic of Ireland</td>
<td>44%</td>
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<tr>
<td>A day trip to somewhere in the Republic of Ireland</td>
<td>42%</td>
</tr>
<tr>
<td>A holiday or short break in Northern Ireland</td>
<td>36%</td>
</tr>
</tbody>
</table>

Thinking about the next 3 months which of these best describes your plans for taking....definitely will not be taking such a trip

August 2020 n=1045
More of us had, or were planning to book a holiday or short break in NI over the next 3 months than any other destination, with RoI coming in as the second most popular choice. Almost a fifth of us were planning to take a trip to GB, with only 15% claiming to have planned or will be planning a trip to mainland Europe or further afield.

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<tr>
<th>Destination</th>
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<tr>
<td>A holiday or short break in Northern Ireland</td>
<td>31%</td>
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<td>A day trip to somewhere in the Republic of Ireland</td>
<td>30%</td>
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<tr>
<td>A holiday/short break or day trip to somewhere in GB (England Scotland or Wales)</td>
<td>18%</td>
</tr>
<tr>
<td>A holiday in mainland Europe or further afield</td>
<td>15%</td>
</tr>
</tbody>
</table>

Thinking about the next 3 months which of these best describes your plans for taking...already booked, planning to, hoping to

August 2020 n=1045
Thinking about the next 3 months which of these best describes your plans for taking..
August 2020 n=1045

### A holiday in mainland Europe or further afield
- Have already booked a trip: 6%
- Planning to take such a trip: 3%
- Hoping to take such a trip: 6%
- Unlikely to take such a trip: 20%
- Definitely will not be taking such a trip: 66%

### A holiday/short break/day trip to GB
- Have already booked a trip: 5%
- Planning to take such a trip: 4%
- Hoping to take such a trip: 9%
- Unlikely to take such a trip: 30%
- Definitely will not be taking such a trip: 51%
Thinking about the next 3 months which of these best describes your plans for taking a trip:

August 2020 n=1045

Summary charts

A holiday/short break in RoI

- Have already booked a trip: 4%
- Planning to take such a trip: 7%
- Hoping to take such a trip: 16%
- Unlikely to take such a trip: 30%
- Definitely will not be taking such a trip: 44%

A holiday/short break in NI

- Have already booked a trip: 5%
- Planning to take such a trip: 7%
- Hoping to take such a trip: 19%
- Unlikely to take such a trip: 33%
- Definitely will not be taking such a trip: 36%
Thinking about the next 3 months which of these best describes your plans for taking... August 2020 n=1045

Summary charts

A daytrip to somewhere in RoI

- Have already booked a trip: 3%
- Planning to take such a trip: 8%
- Hoping to take such a trip: 19%
- Unlikely to take such a trip: 28%
- Definitely will not be taking such a trip: 42%
Easing of Lockdown
Over two fifths preferred that lockdown restrictions had been kept tighter for longer, with more of those shielding stating this. The same proportion claimed they were easy with the lifting of restrictions, comforted by fact that should R rate increase lockdown would be reinstated. Only 15% of us would like to see more or all restrictions lifted.

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would prefer that lockdown restrictions had been kept tighter for longer than they have been</td>
<td>42%</td>
</tr>
<tr>
<td>I am easy with the lifting of lockdown restrictions, knowing that if the R rate increases we may be asked to go back to full lockdown</td>
<td>43%</td>
</tr>
<tr>
<td>I would like to see more of the restrictions eased more quickly</td>
<td>9%</td>
</tr>
<tr>
<td>I would like to see all restrictions lifted immediately</td>
<td>6%</td>
</tr>
</tbody>
</table>

Had been shielding: 52%
Someone in house was shielding: 51%
Not serious but clinically vulnerable: 37%
None of household vulnerable: 40%

Which of these best describes how you feel about lockdown easing in NI? August 2020 n=1045
Almost half of parents (kids U15) agreed they were content with their children returning to school 5 days a week. A fifth (61 of the parents questioned) were not content and 19 of them were prepared to keep their children at home, despite legislation.

To what extent do you agree or disagree with the following...

August 2020, Those with kids 15 and under n=280

I am content that my children will be going back to school 5 days a week in September

48% agree / 21% disagree

Don't know
Over 3 in 5 parents agreed they were nervous about their children contracting Covid-19 when returning to school, with only 16% disagreeing.

I am nervous about my children contracting Covid-19 when they return to school

- Strongly Agree: 28
- Agree: 35
- Neither / Nor: 15
- Disagree: 10
- Strongly Disagree: 6
- Don't know: 6

63% agree / 16% disagree
Over three quarters of parents, who had children who get bus to school, were prepared to take them, to keep the family safe, while 3 in 5 were willing to wash uniforms daily. Almost 7 in 10 would provide their older children with face coverings for school if it meant keeping the family safe.
Over 7 in 10 parents claimed their children’s use of electronic devices had increased over lockdown. Now that restrictions had eased, half of these parents will definitely limit the amount of time spent on devices with a further third stating they will probably limit screen time.

Has the amount of time your children spent on electronic devices such as iPads, tablets and games consoles increased, remained the same, decreased during lockdown?

Now that restrictions are easing, will you try to limit the amount of time your children spend on electronic devices? n=199

- Increased 71%
- Remained the same 26%
- Decreased 3%

Has the amount of time your children spent on electronic devices increased?