



# Expected impact of Brexit on NI consumers

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The Consumer Council

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# Contents

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1. Executive summary.....	1
2. Introduction .....	4
3. Consumer Landscape .....	5
4. Food .....	12
5. Post .....	13
6. Travel.....	15
7. Energy .....	17
8. Future consumer matters .....	19
9. Conclusions and recommendations .....	21
Appendix A: Methodology .....	23

For more information, please contact:

**Perceptive Insight Market Research Ltd.**

Jacob Peterson House  
109 Bloomfield Ave  
Belfast  
BT5 5AB

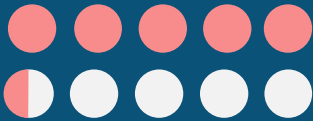
Phone: 02890 737090

Website: <http://www.perceptiveinsight.co.uk/>

# Expected impact of Brexit on NI consumers



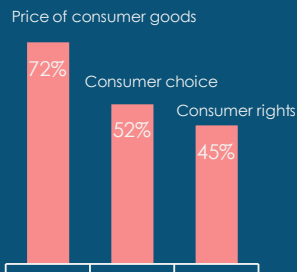
## Key facts



Over half are concerned about the impact of Brexit

\* selected 7 or higher on a scale of 1 to 10

It is expected that Brexit will have a **negative impact** on a number of consumer matters.



**Maintaining financial stability** in the household was rated as the most important consumer matter

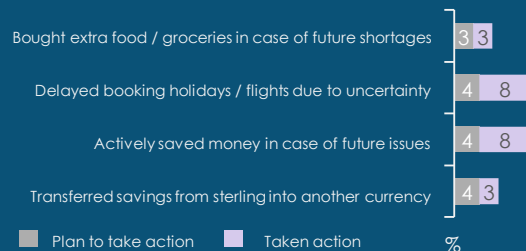


**Stable prices** was rated as the second most important matter



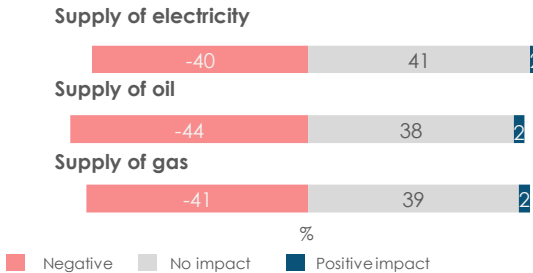
Followed by **Ease of travel**

### ...But few have taken any action

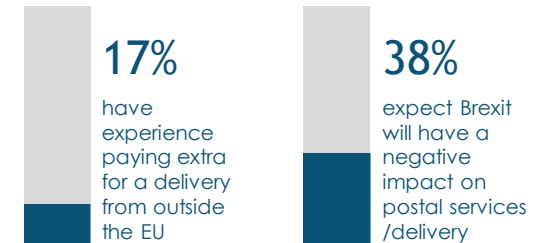


## What impact do you think Brexit will have on the following?

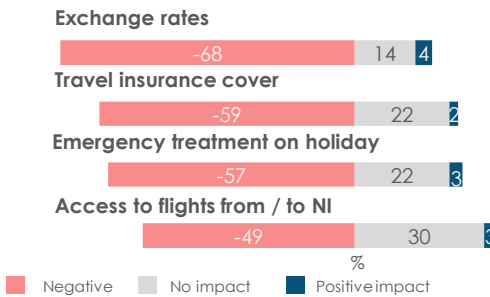
### Energy



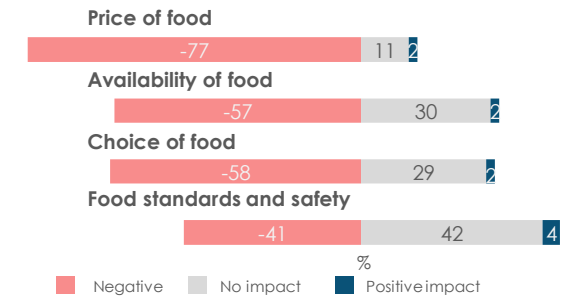
### Post



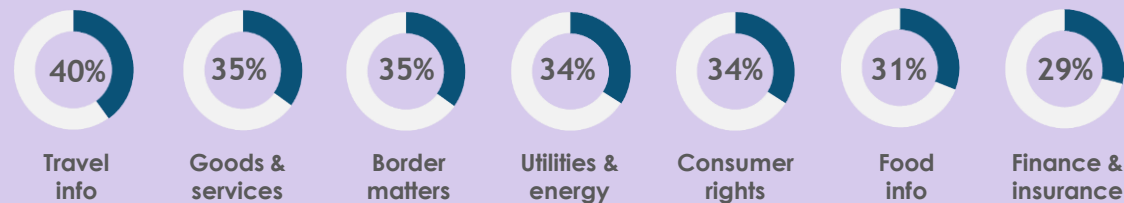
### Travel



### Food



## Information consumers would find useful



This study was conducted by the independent research company 1,004 face to face interviews carried out between 11 February and 12 March 2019



# 1. Executive summary

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The Consumer Council commissioned Perceptive Insight to undertake quantitative research with a representative sample of consumers across Northern Ireland (NI). The aim of the research was to ascertain public perceptions about the likely impacts of Brexit for NI consumers, particularly in relation to:

- Utilities/energy;
- Transport;
- Postal services; and
- General consumer detriment.

The insight elicited from this research will form the basis for future planning and strategic decision making within the Consumer Council.

Face-to-face interviewing took place between the 11th February and the 12th of March across 78 sampling points in Northern Ireland using specialised CAPI (Computer Assisted Personal Interviewing) software. A total of 1,004 interviews were completed. The key findings are presented in a number of sections and are outlined below.

## Consumer landscape

Respondents were asked to what extent, if at all, Brexit is of concern to them as consumers, their views towards the potential impact of Brexit on a range of consumer matters, and what actions they have undertaken in preparation for Brexit.

Over half of respondents (55%) were 'concerned' about the impact of Brexit (scoring 7 or more on a scale of 1 to 10). Those living within 10 miles of the border were significantly more likely to provide a score in this range; 66% compared to 52% of those residing in non-border areas.

In relation to consumer issues more generally, 45% felt that Brexit would have a negative impact on consumer rights and standards, 52% on consumer choice and 72% on the price of consumer goods. Few (5% or less) thought that Brexit would have a positive impact across each of these areas.

Respondents were asked if they thought Brexit would have a positive or negative impact across a range of consumer areas including holidays, transport, telecoms and socialising. In each case 3% or less believed the impact would be positive. The aspects that respondents were most likely to say would be negatively impacted included 'going on holidays abroad' (62%), 'the price of energy' (62%), 'cross border public transport' (57%) and 'buying and running a car' (50%).

When asked about the priority they attach to a range of consumer matters, 'maintaining the financial stability of your household' emerged as the most important matter to the greatest proportion of respondents; 79% ranked this issue as 'very important' (5 on a scale) and 48% selected it as the consumer matter of most importance to them. The second most important

matter was 'stable prices/bills' (74% rated this as very important), followed by 'the continued availability of goods and services' (72%).

A small proportion had taken action in preparation for Brexit. The most common actions, which respondents had or planned to undertake due to Brexit, were 'delayed booking flights due to uncertainty about travelling' (12%) and 'actively saved money in case of future issues' (12%).

## Food

Consumers were asked about the potential impact of Brexit on a number of food-related issues. 'Price of food' attracted the most stark response with over three quarters (77%) reporting that they expect Brexit will have a negative impact, with only 11% expecting it to have no impact at all and 2% a positive impact. Across all of the issues, women were more likely than men to foresee a negative impact; 45% compared to 38% regarding food standards and safety, 61% compared to 55% regarding choice of food, 62% compared to 51% regarding availability of food and 82% compared to 72% regarding price of food.

## Post

Almost two fifths (39%) of respondents had placed orders for goods delivered from outside the UK but within the EU (including the Republic of Ireland (ROI)) at least once in the last 12 months. The most commonly ordered items were clothes or shoes (53%) and electronic goods (41%). Almost one quarter (24%) of respondents had sent or posted parcels or letters across the border to ROI at least once in the last 12 months. This rose to 28% of those in border areas. 17% of respondents have had to pay extra on receipt of a delivery from outside the EU. 38% expect that Brexit will have a negative impact on postal services.

## Travel

Respondents were asked about the expected impact on a number of issues regarding travel. The largest percentage of respondents expected Brexit to have a negative impact on exchange rates (68%) with only 14% and 4% respectively suggesting it would have no impact or a positive impact. This was followed by travel insurance cover, with 59% of respondents expecting Brexit to have a negative impact, while only 22% and 2% foresaw no impact or a positive impact respectively.

## Energy

Responses across all three issues (supply of electricity, supply of oil and supply of gas) were similar; ranging from 40% – 44% of respondents anticipating a negative impact from Brexit. A pattern of variation in response can be seen across the energy issues when comparing those living in rural/urban areas and those living in border/non-border areas, with those in border and rural areas more likely to anticipate a negative impact.

## Future consumer matters

Respondents were asked about which types of information concerning Brexit would be useful to them and how they would best like to receive this. Two fifths (40%) said that 'travel information' would be useful to them. This was the most popular response above 'goods/services information' and 'information on border matters;' with 35% stating information

of each of these types would be useful. Overall, half of respondents wanted to receive information online or via a website, however preferences varied considerably depending on age and disability status.

## Recommendations

The following recommendations are intended to support the Consumer Council's actions in response to the concerns and priorities raised by consumers through this survey:

- ✓ Given the particularly high levels of concern towards the impact of Brexit amongst those in border areas, the Consumer Council might consider a focused information campaign tailored for these consumers looking in particular at issues around cross border travel, cross border postal services and energy supply.
- ✓ In order to better prepare and reassure consumers, the Consumer Council might consider further research on the likelihood and extent of price increases and, if necessary, how households can make savings to offset these changes.
- ✓ Given the preference for online and website based information, particularly among under 35s, the Consumer Council may consider increasing the number of online resources available on the potential impact of Brexit. These resources could focus on 'travel information' to correspond with the exhibited preferences of this age group.
- ✓ Information delivery could be similarly tailored to consumer preference and priorities elsewhere, for example, information seen as particularly useful by those 55 and older could be provided via leaflets and/ or newspaper/magazine articles.

## 2. Introduction

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As a non-departmental public body whose principal statutory duty is to promote and safeguard the interests of consumers across Northern Ireland (NI), the Consumer Council actively monitors a variety of services, including energy, post, transport and water/sewage. This includes carrying out research into matters that may have an impact on these services and consumer affairs. The Consumer Council's commitment to understanding how particular policies or issues impact NI customers is underpinned by a policy framework<sup>1</sup> that is dedicated to protecting the rights of consumers, including the rights to:

- basic needs;
- safety;
- be informed;
- choose;
- be heard;
- redress;
- consumer education; and
- a healthy environment.

Most recently, the Consumer Council has identified the need to better understand the opinions and thoughts NI consumers have about the potential impacts Brexit will bring.

### Aim

The Consumer Council commissioned Perceptive Insight to undertake quantitative research with consumers across NI. The aim of the research was to ascertain public perceptions about the likely impacts of Brexit for NI consumers, particularly in relation to:

- Utilities/energy;
- Transport;
- Postal services; and
- General consumer detriment.

The insight elicited from this research will form the basis for future planning and strategic decision making within the Consumer Council. The research was based on similar work which has been carried out in Great Britain by 'Which?'

### Implementation

Face-to-face interviewing took place between the 11th February and the 12th of March 2019 across 78 sampling points in Northern Ireland using specialised CAPI (Computer Assisted Personal Interviewing) software. A total of 1,004 interviews were completed. Quotas on the number of interviews to be achieved were set based on age, gender, socio-economic status and location so as to be representative of the adult Northern Ireland population (see Appendix A for further details).

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<sup>1</sup> [http://www.consumercouncil.org.uk/sites/default/files/original/Draft\\_Corporate\\_Plan\\_2016\\_2021.pdf](http://www.consumercouncil.org.uk/sites/default/files/original/Draft_Corporate_Plan_2016_2021.pdf)

### 3. Consumer landscape

This section examines overall consumer concern towards Brexit, respondent views towards the potential impact of Brexit on a range of consumer matters and actions undertaken in preparation for Brexit.

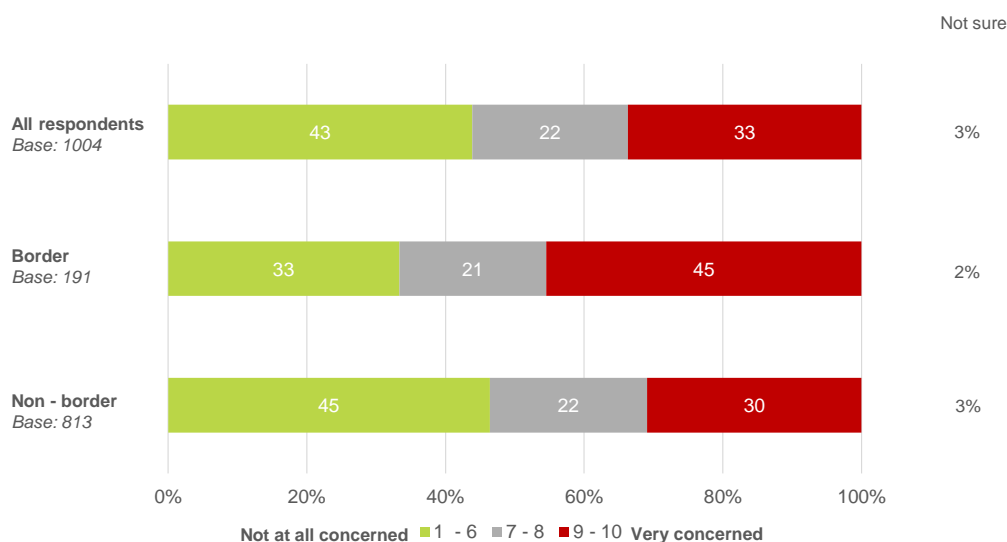
#### Overall concern about the impact of Brexit as a consumer in Northern Ireland

Using a scale of 1 to 10 respondents were asked to indicate how concerned, if at all, they are about the impact of Brexit on consumers. While 43% provided a score of 6 or less, over half (55%) expressed 'concern' about Brexit rating it as 7 to 10 on the scale.

- Of note, those living in border areas are more likely to be concerned with 66% responding with 7 to 10 on the scale, compared to 52% of those residing in non-border areas.

B2 As a consumer in Northern Ireland, to what extent do you feel concerned about the impact of Brexit?

Individual bases below



On a scale of 1 to 10 where 1 is 'Not at all concerned' and 10 is 'very concerned'.

#### Impact of Brexit on consumer rights and standards, consumer choice and price of consumer goods

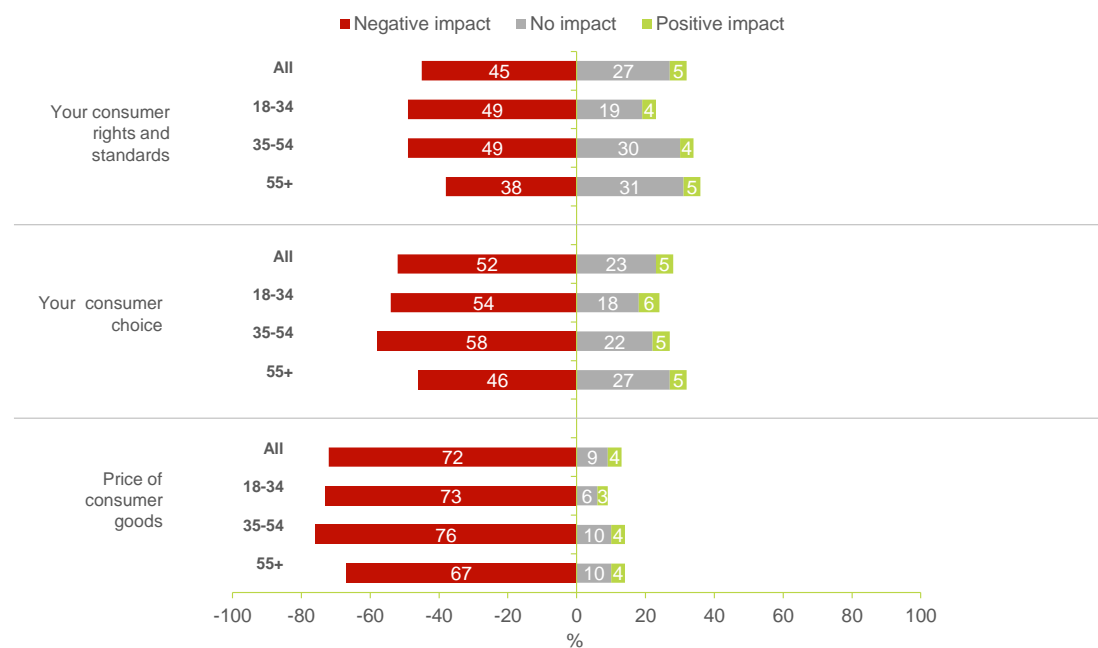
Overall, 45% felt that Brexit would have a negative impact on consumer rights and standards, 52% on consumer choice and 72% on the price of consumer goods. Few (5% or less) thought that Brexit would have a positive impact across each of these areas.

There were significant disparities in response by age category. As you can see from the chart overleaf, those aged 55 or older were less likely to predict a negative impact than those in the 18 to 34 and 35 to 54 age categories.

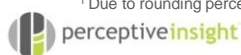


## B1 What impact, if any, do you think Brexit will have in relation to the following consumer matters in Northern Ireland...?

Base 1004: All respondents  
 Base 289: 18 - 34  
 Base 350: 35 - 54  
 Base 365: 55+



<sup>1</sup> Due to rounding percentages add to 99%-101%



Other notable differences were apparent between those living in border areas and non-border areas, particularly in relation to consumer rights and standards and consumer choice.

- In relation to the former, 57% in border areas thought Brexit would have a negative impact compared to 42% in non-border areas, while towards the latter, 62% in border areas thought Brexit would have a negative impact compared to 50% in non-border areas.

The differences in perspective between those with a disability and those without were also marked.

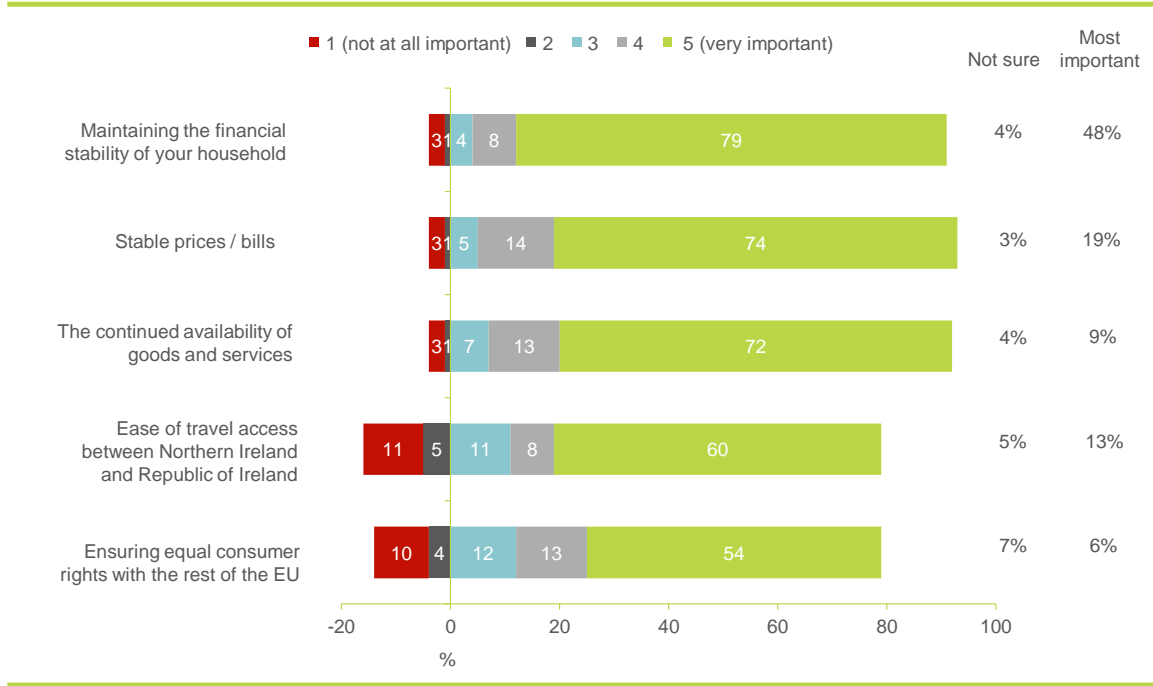
- 37% of those with a disability expected a negative outcome in terms of consumer rights and standards compared to 47% of those with no disability. Similar results were found in terms of consumer choice (45% compared to 54%) and price of consumer goods (64% compared to 74%).

### Importance of a range of consumer matters

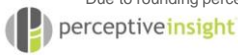
When asked about the importance they attached to a range of consumer matters, 'maintaining the financial stability of your household' emerged as the most important matter to the greatest proportion of respondents; 79% ranked this issue as 'very important' (5 on a scale) and 48% selected it as the consumer matter of most importance to them. 'Stable prices' came second; ranked as 'very important' by 74% of respondents with 19% selecting it as the matter of most importance to them.

### B3 Could you please tell me to what extent these consumer matters are important to you?

Base 1004: All respondents



<sup>1</sup> Due to rounding percentages add to 99%-101%



Looking more closely at the issues of ‘maintaining financial stability in your household,’ significant differences arise in responses across the demographic breaks.

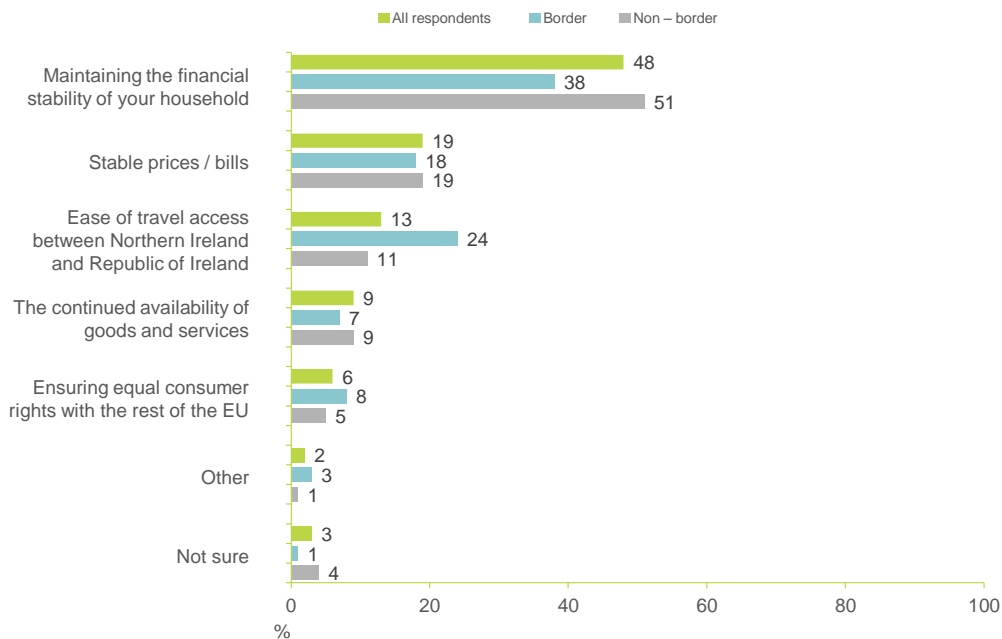
- Women were more likely to rank this issue of most importance than men (52% compared to 45%);
- And 35 to 54 year olds were more likely to respond in this way (53%) than those aged 55 or older (43%).

The most substantial differences however appear in relation to the rural/urban and border/non-border divides.

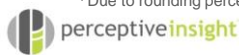
- Over half (53%) of those in urban areas saw household financial stability as the issue of most importance to them compared to 39% in rural areas; similarly 51% of those in non-border areas chose this consumer matter compared to 38% in border areas.
- However almost one quarter (24%) of those in border areas considered ‘ease of travel access between NI and ROI’ to be of most importance; 13% points more than those in non-border areas (11%).

## B4 Which of these consumer matters is of most importance to you?

Base 1004: All respondents  
Base 191: Border  
Base 813: Non - border



<sup>1</sup> Due to rounding percentages add to 99%-101%



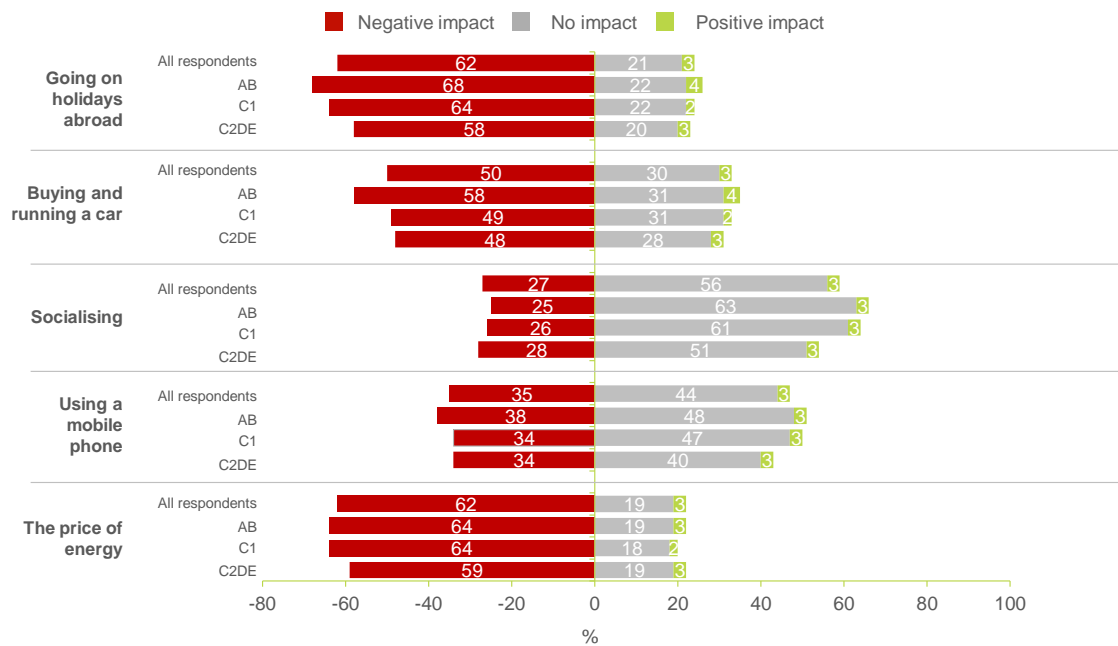
## Impact of Brexit on cost to consumers

Only 3% of respondents expected Brexit to have a positive impact on the cost to consumers of; going on holidays abroad, buying and running a car, socialising, using a mobile phone, and the price of energy.

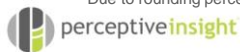
By comparison, almost two thirds (62%) of respondents thought Brexit would have a negative impact on 'going on holidays abroad,' 'the price of energy,' and 50% on the price of buying and running a car. A substantial percentage in each case expected Brexit to have no impact at all (56% 'socialising'; 44% 'using a mobile phone'; 30% 'buying and running a car'; 21% 'going on holidays abroad'; and 19% 'the price of energy').

## B5 Do you think Brexit will have a positive impact, negative impact or no impact on the cost to Northern Ireland consumers of...?

Base 1004: All respondents Base 325: C1  
Base 179: AB Base 500: C2DE



<sup>1</sup> Due to rounding percentages add to 99%-101%



- In terms of 'going on holidays abroad,' significantly more respondents aged 18 to 34 and 35 to 54 expected Brexit to have a negative impact (68% and 64% respectively) compared to those in the over 55 category (55%).
- A disparity was also notable in relation to socioeconomic grouping with 10% points more ABs expecting a negative impact than in the C2DE category (68% compared to 58%).
- In relation to 'the price of energy,' a significant difference was again seen in outlook between rural and urban residents. Those in urban areas were more likely to expect a negative impact on price (65%) than their rural counterparts (56%).

A number of notable differences were apparent in this section between the views of those in border and non-border areas.

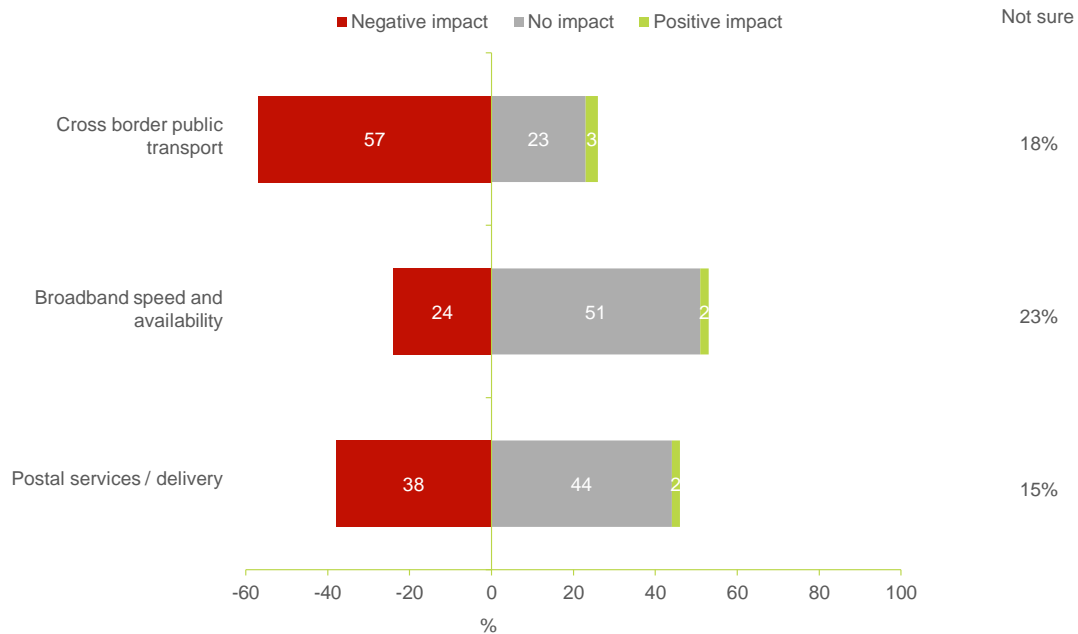
- Those in border areas were significantly more likely than those in non-border areas to think that Brexit will have a negative impact on the cost of almost all of the activities listed (with the exception of 'going on holiday abroad').
- The most significant differences were in relation to socialising (41% compared to 23%) and using a mobile phone (46% compared to 32%).

### Impact of Brexit on consumer services

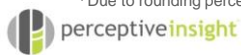
Of the three services included in the survey (cross border public transport, broadband speed and availability, and postal services/delivery), respondents were most likely to think that Brexit would have a negative impact on 'cross border public transport' with 57% responding in this way. Over half (51%) felt that Brexit would have no impact on 'broadband speed and availability' with a considerable proportion (44%) also thinking it would have no impact on 'postal services/delivery.'

**B6 Do you think Brexit will have a positive impact, negative impact or no impact on the following services for Northern Ireland consumers?**

Base 1004: All respondents



<sup>1</sup> Due to rounding percentages add to 99%-101%



Views on the impact of Brexit on 'cross border public transport' varied considerably depending on age and location.

- Those in the 18 to 34 age bracket were much more likely to expect a negative impact (67%) compared to 35 to 54 year olds (59%) who were, in turn, more likely to predict a negative outcome than the over 55s (47%).
- Also those located in a border area were more likely to anticipate a negative impact on cross-border transport (64%) compared to those in non-border areas (55%).

**Actions in preparation for Brexit**

Few had taken action in preparation for Brexit. The most common actions which respondents had, or planned to, undertake due to Brexit were 'delay booking flights due to uncertainty about travelling' (12%) and 'actively save money in case of future issues' (12%).

**Figure 1.1: B7 Have you undertaken or plan to undertake any of the following actions due to Brexit?**

B7 Have you deliberately undertaken or plan to undertake any of the following actions due to Brexit?	Urban / rural					
	All respondents Base: 1004		Urban Base: 672		Rural Base: 332	
	Plan to undertake	Have undertaken	Plan to undertake	Have undertaken	Plan to undertake	Have undertaken
Bought extra food or other groceries in case of future shortages	3%	3%	2%	2%	6%	4%
Delayed booking holidays or flights, due to uncertainty about travelling	4%	8%	2%	7%	10%	8%
Deliberately booked flights from Dublin/ROI rather than Belfast/NI	3%	3%	1%	3%	7%	5%
Deliberately booked flights from Belfast/NI rather than Dublin/ROI	3%	2%	1%	1%	8%	3%
Deliberately delayed plans for buying a house, in case prices change after Brexit	2%	2%	1%	2%	6%	4%
Deliberately made big purchases in advance of Brexit in case of future price changes	3%	3%	1%	1%	8%	5%
Actively saved money in case of future issues	4%	8%	3%	6%	7%	11%
Transferred savings from sterling into another currency	4%	3%	1%	1%	9%	5%

Across all of the activities there were significant differences in the preparation plans of rural and urban respondents.

- In each case, those living in a rural setting were more likely to 'plan to undertake' the action ahead of Brexit than their urban counterparts. The biggest differences were in relation to 'delay booking holidays or flights' (10% compared to 2%) and 'transfer savings from Sterling into another currency' (9% compared to 1%).

## 4. Food

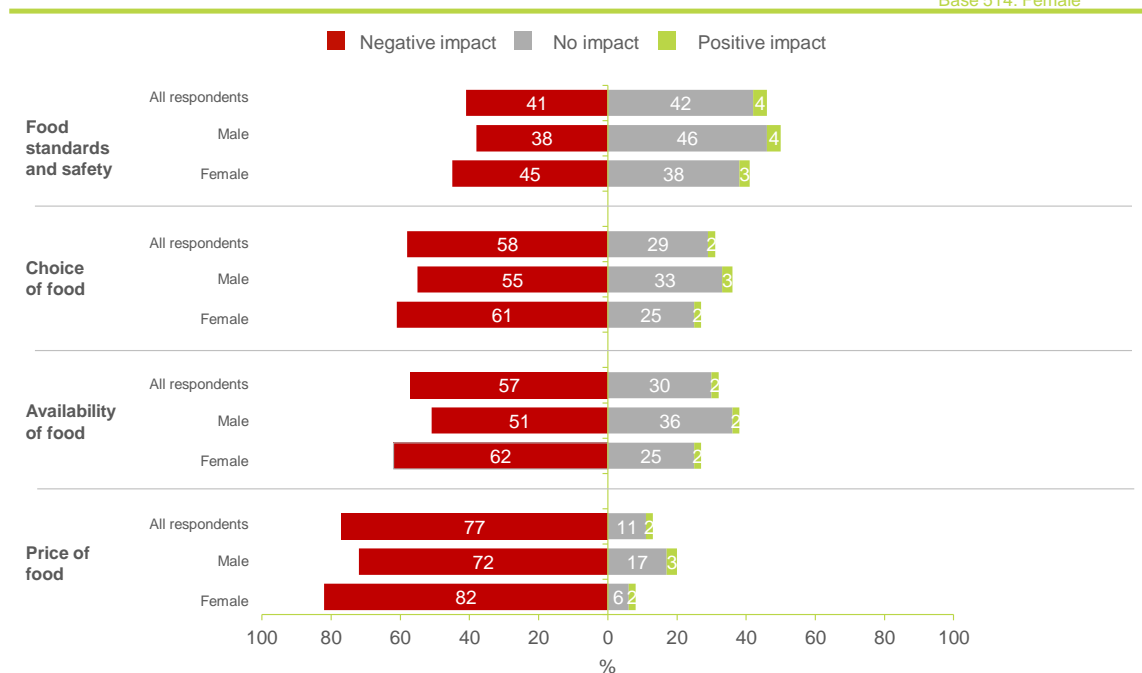
This section examines consumer views toward the potential impact of Brexit on a number of food-related matters.

Over three quarters (77%) of respondents thought that Brexit would have a negative impact on the price of food with only 11% expecting it to have no impact at all and 2% believing it will be positive. The majority also anticipate a negative impact on choice (58%) and availability of food (57%).

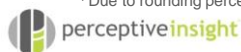
- As can be seen in the chart below, across all of the issues women were more likely than men to foresee a negative impact.

C1 What impact, if any, do you think Brexit will have in relation to Northern Ireland's...?

Base 1004: All respondents  
Base 490: Male  
Base 514: Female



<sup>1</sup> Due to rounding percentages add to 99%-101%



Again age was a significant determinant of response.

- Those aged 55 or older were less likely to predict a negative impact than respondents in the 18 to 34 or 35 to 54 age categories on food standards and safety (36% compared to 42% and 47% respectively); choice of food (50% compared to 62% and 63% respectively); availability of food (48% compared to 61% and 62% respectively); and price of food (72% compared to 80% and 79% respectively).

There was additionally a marked difference between the response of those in border areas compared to non-border areas in relation to food standards and safety.

- Over half (56%) of respondents in border areas thought that Brexit would have a negative impact on this matter compared to 38% in non-border areas.

## 5. Post

This section explores respondent experiences of sending and receiving post from outside the UK but within the EU (including ROI), across the border with the Republic of Ireland, and outside the EU; including experiences of additional fees.

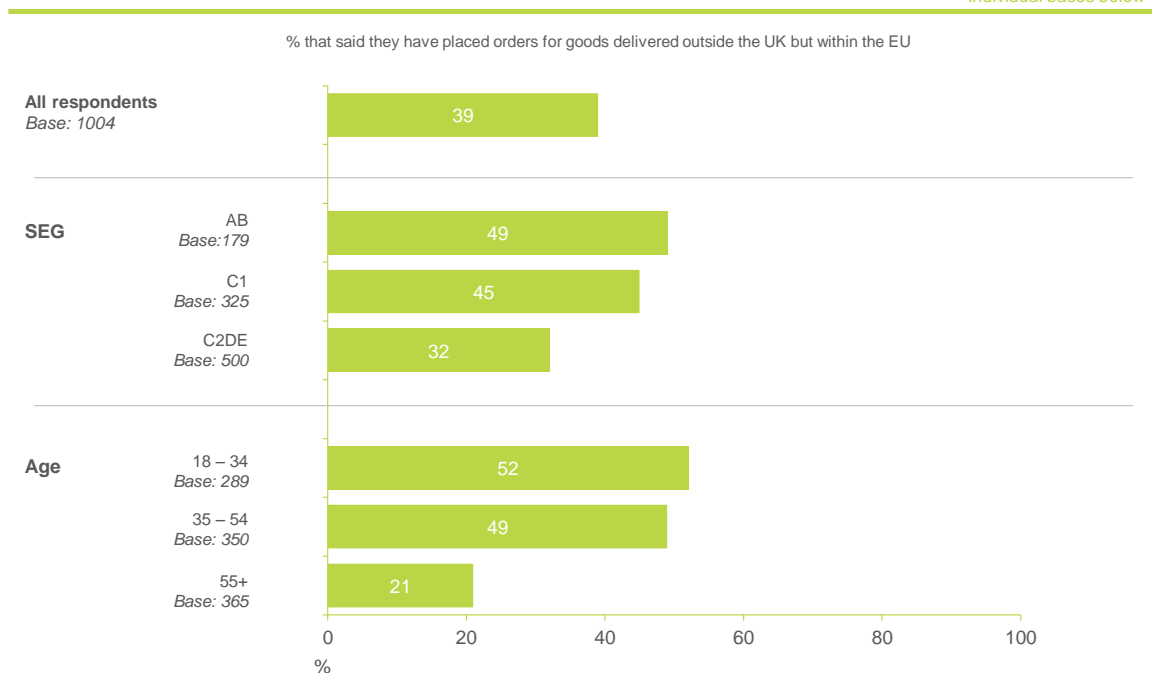
### Orders to be delivered from outside the UK but within in the EU (including ROI)

Almost two fifths (39%) of respondents had placed orders for goods delivered from outside the UK but within the EU (including ROI) at least once in the last 12 months. The most commonly ordered items were clothes or shoes (53%) and electronic goods (41%).

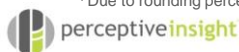
- The likelihood that an individual had placed an order of this type varied considerably across age categories with 77% of over 55s never having done so compared to only 46% of 18 to 34 year olds and 48% of 35 to 54 year olds.
- Socioeconomic grouping was also a significant factor. Two thirds (66%) of respondents in the C2DE group had never placed an order compared to 49% in the AB and 50% in the C1 grouping.

D1 In the last 12 months, how many times, if at all, have you placed orders for goods delivered from outside the UK but within the EU (including ROI)?

Individual bases below



<sup>1</sup> Due to rounding percentages add to 99%-101%



### Posting across the border to the Republic of Ireland

Almost one quarter (24%) of respondents had sent or posted parcels or letters across the border to the Republic of Ireland at least once in the last 12 months.

- This rose to 28% for those residing in border areas.

Again age and socioeconomic grouping were clear determinants of behaviour.



- 80% of over 55s had never posted across the ROI border compared to 74% of 18 to 34 year olds and 67% of 35 to 54 year olds;
- 82% of those in the C2DE grouping had never done so compared to 62% and 68% in the AB and C1 groupings respectively.

### **Paying extra on receipt of a delivery from outside the EU**

A large majority of respondents (72%) have never had to pay extra on receipt of a delivery from outside the EU.

Those who have had to pay varied by age and socioeconomic group, with those from the younger age categories more likely to have encountered this (23% of 18 to 24 year olds and 22% of 35 to 54 year olds compared to 6% of over 55s); and the AB and C1 socioeconomic groups also more likely to have had to pay extra (22% and 23% respectively compared to 10% in the C2DE grouping).

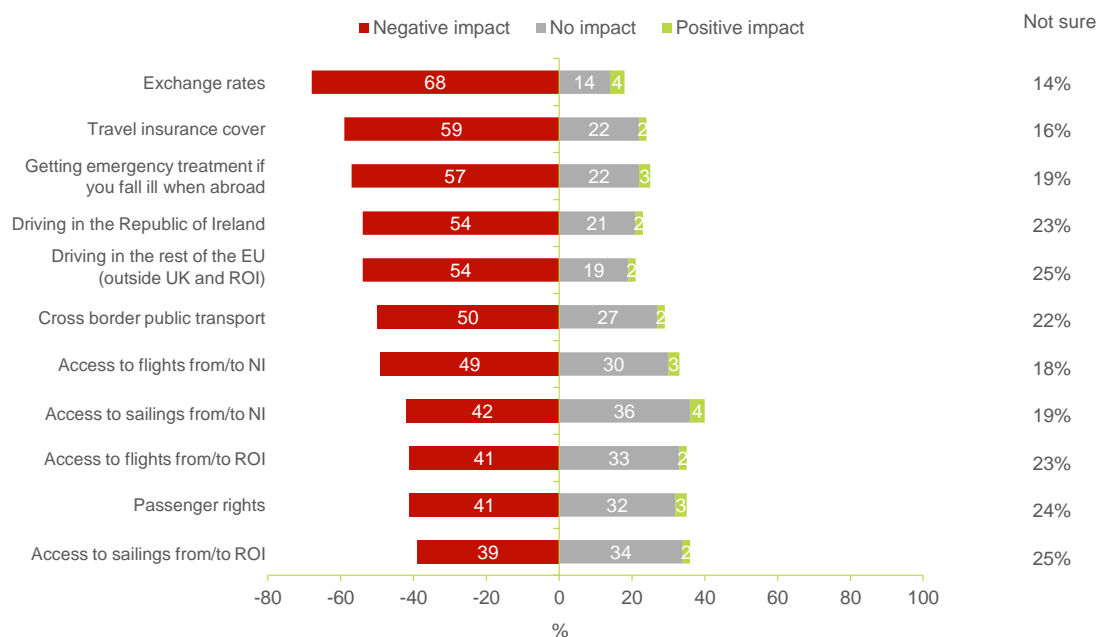
When asked further questions about their experience, those who have had to pay additional charges most strongly agreed with the statements; 'The fees charged felt disproportionate to the item received' (63% agreed or strongly agreed); and 'I was inconvenienced by the delay in receiving my postal item' (again 63% agreed or strongly agreed).

## 6. Travel

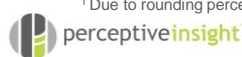
Respondents were asked for their thoughts on whether Brexit will have an impact for Northern Ireland consumers on a range of travel-related activities.

E1 What impact, if any, do you think Brexit will have for Northern Ireland consumers in relation to each of the following **travel-related activities**?

Base 1004: All respondents



<sup>1</sup> Due to rounding percentages add to 99%-101%



The largest percentage of respondents expected Brexit to have a negative impact on exchange rates (68%) with only 14% and 4% respectively suggesting it would have no impact or a positive impact. This was followed by travel insurance cover with 59% of respondents expecting Brexit to have a negative impact while only 22% and 2% foresaw no impact or a positive impact respectively.

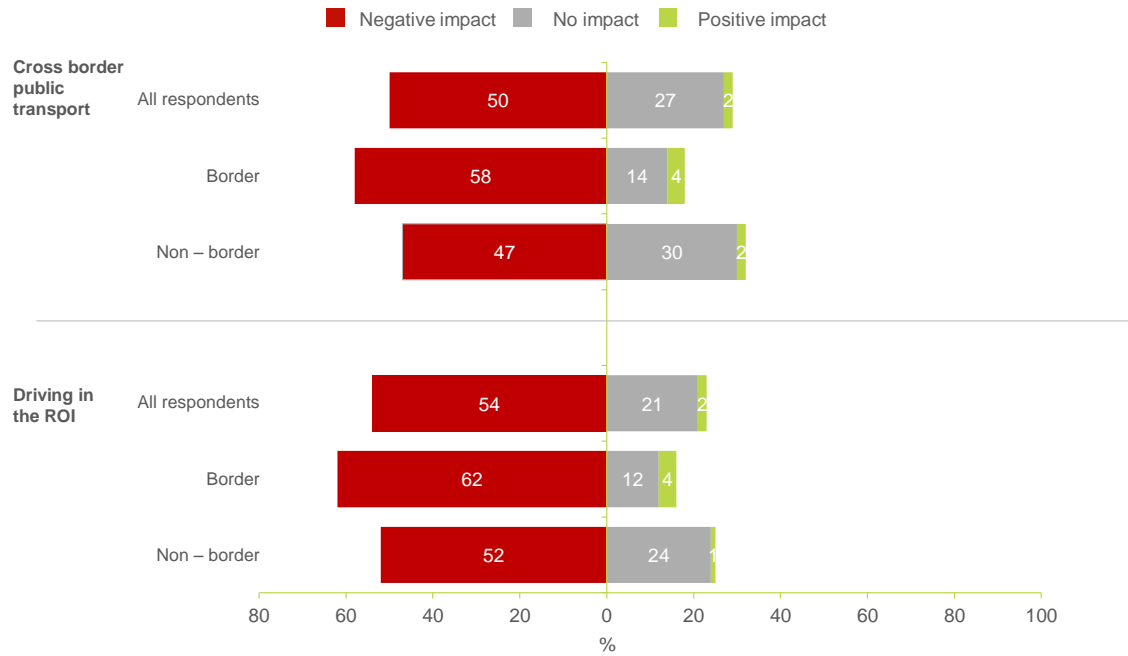
- Within these results, those in the younger age categories were more likely to predict a negative impact. 73% of both 18 to 34 and 35 to 54 year olds expected Brexit to have a negative impact on exchange rates compared to 59% of over 55s.
- Similarly, 67% of 18 to 34 year olds and 60% of 35 to 54 predicted a negative effect on travel insurance cover compared to 52% in the oldest age category. This was a recurring pattern in all of the travel-related activities.

This was also an area in which considerable differences emerged between the outlook of those in border areas and non-border areas. Those in border areas were more likely to register 'negative impact' in the majority of instances with the greatest disparities being in relation to 'access to sailings from/to Northern Ireland' (55% of border inhabitants compared to 38% of non-border) and 'access to sailings from/to ROI' (49% of border inhabitants compared to 37% in non-border areas). As can be seen in the chart overleaf, however, there were also significant differences in relation to 'cross border public transport' (58% of border residents predicted a negative impact compared to 47% in non-border areas) and 'driving in

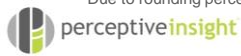
ROI' (62% of border residents expected a negative impact compared to 52% in non-border areas).

E1 What impact, if any, do you think Brexit will have for Northern Ireland consumers in relation to each of the following **travel-related activities?**

Base 1004: All respondents  
 Base 191: Border  
 Base 813: Non – border



<sup>1</sup> Due to rounding percentages add to 99%-101%



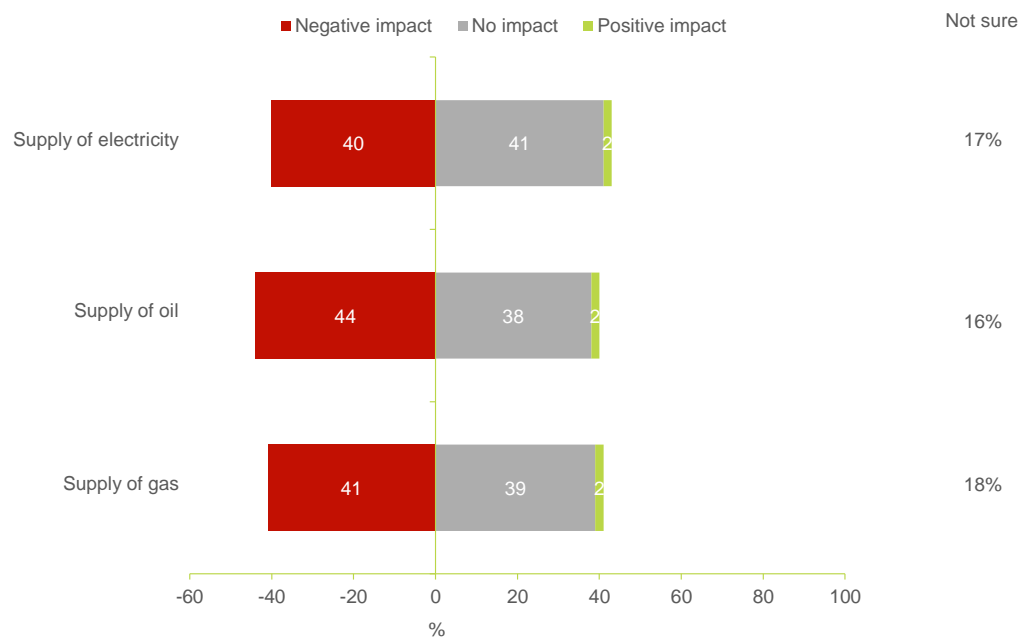
# 7. Energy

In this section, respondents were asked about the potential impact of Brexit on a number of energy related issues.

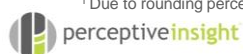
Responses across all three issues (supply of electricity, supply of oil and supply of gas) were similar; ranging from 40% to 44% of respondents anticipating a negative impact with around two fifths expecting no impact and 2% a positive impact.

## F1 What impact, if any, do you think Brexit will have on the following energy related issues in Northern Ireland?

Base 1004: All respondents



<sup>1</sup> Due to rounding percentages add to 99%-101%



A pattern of variation in response can be seen across the energy issues when comparing those living in rural/urban areas and those living in border/non-border areas.

- A greater percentage of those living in border areas than non – border areas expected a negative impact on supply of electricity (51% compared to 38%); supply of oil (55% compared to 42%) and supply of gas (50% compared to 39%).

**Figure 5.1: What impact, if any, do you think Brexit will have on the following energy related issues in Northern Ireland? Percentage that said Brexit will have no impact**

F1 What impact, if any, do you think Brexit will have on the following energy related issues in Northern Ireland?	All respondents Base: 1004	Urban / rural		SEG		
		Urban Base: 672	Rural Base: 332	AB Base: 179	C1 Base: 325	C2DE Base: 500
Supply of electricity	41%	46%	32%	51%	44%	37%
Supply of oil	38%	42%	31%	46%	40%	34%
Supply of gas	39%	42%	33%	46%	43%	35%

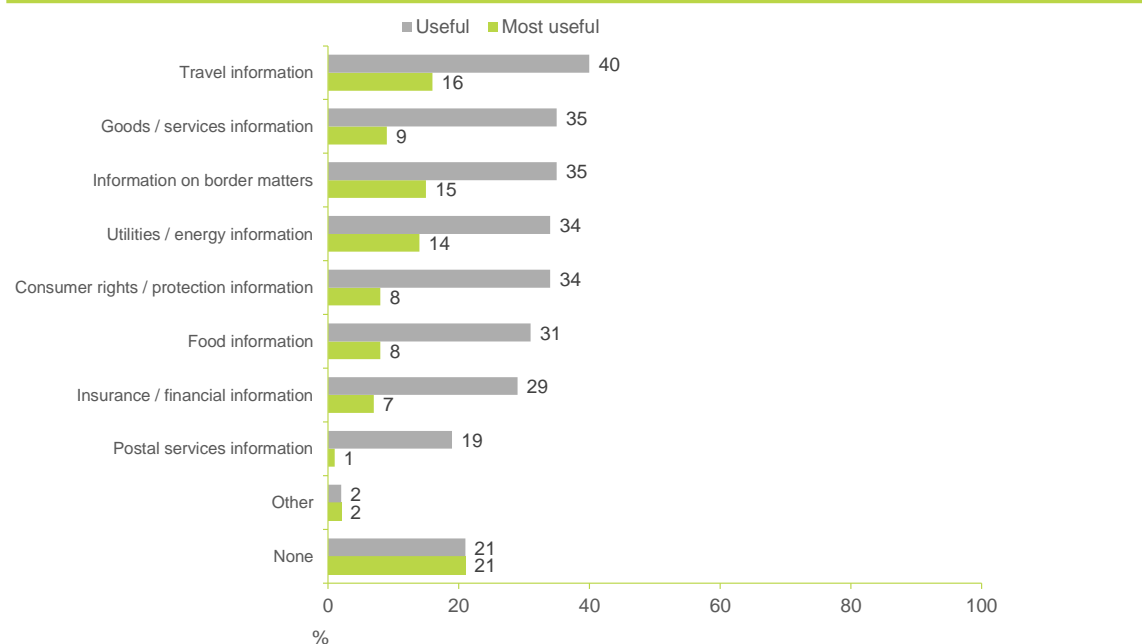
## 8. Future consumer matters

Respondents were asked whether various types of information, if any, would be useful to them in relation to Brexit.

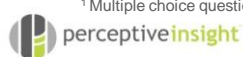
Two fifths (40%) of respondents said that ‘travel information’ would be useful to them with 16% of those suggesting it would be the most useful type of information of those listed. This was the most popular response above ‘goods/services information’ and ‘information on border matters’; 35% stated information of each of these types would be useful with 9% and 15% saying they would be the most useful respectively.

H1 Which of the following, if any, would be useful to you in relation to Brexit?

Base 1004: All respondents



<sup>1</sup> Multiple choice question, therefore figures add to more than 100%



Those in the youngest age category were most likely to be interested in receiving travel information; with 49% of 18 to 34 year olds saying that information of this type would be useful and 20% saying it would be the most useful. This was followed by 41% and 16% in the 35 to 54 age category; and 32% and 12% of over 55s.

There was a marked disparity between those with a disability and those without in response to travel information.

- 42% of those without a disability would be interested in such information compared to 32% of those with a disability.

Looking in more depth at the response to ‘information on border matters,’ significant variations are once again seen according to age.

- Almost two fifths (39%) of both 18 to 34 year olds and 35 to 55 year olds said information of this type would be useful compared to only 28% of over 55s.

- Over half (53%) of respondents living in border areas registered interest in this type of information compared to just under a third (31%) in non-border areas.

Regarding the other types of information offered, notable differences were seen between the responses of border and non-border residents in relation to 'postal services information';

- 31% of those in border areas said this information would be useful compared to 16% in non-border areas.

Interest in insurance/financial information also varied considerably according to socioeconomic group; with those in the AB grouping (41%) more likely to say such information would be useful followed by 31% in the C1 and 24% in the C2DE groupings.

Interestingly, over 55s were more likely to say that none of the listed information would be useful with over a quarter responding in this way (27%) compared to 17% of both 18 to 34 and 35 to 54 year olds. A similar pattern is seen in terms of socioeconomic group with a larger percentage (25%) of those in the C2DE group responding that 'none' of the information would be useful compared to 17% in the AB and 15% in the C1 categories.

Overall, half of respondents wanted to receive information online or via a website, however preferences varied considerably depending on age and disability status.

- While 63% of 18 to 34 year olds wanted to access the information in this way, this dropped 53% for 35 to 54 year olds and further to 36% for over 55s.
- Popular access methods among over 55s included newspaper/magazine articles (28%) and leaflets (18%).
- Similarly 53% of those with a disability wanted to access information online compared to 37% of those without.

## 9. Conclusions and recommendations

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This section provides a series of concluding remarks and recommendations based on the survey findings outlined above.

### **Considerable levels of concern about the potential impact of Brexit**

The results of the survey indicate that consumers in Northern Ireland are considerably concerned about the potential impact of Brexit. Over half (55%) responded that they were 'concerned' (selecting 7, 8, 9 or 10 on a scale of 1 to 10) about the impact of Brexit as consumers in Northern Ireland. Those in rural areas and border areas emerged as those most likely to be 'concerned' with 59% and 66% respectively registering 7 to 10 on the scale.

Almost half (48%) highlighted 'maintaining the financial stability of your household' as the consumer matter of most importance to them following Brexit and a significant majority (72%) also expected Brexit to have a negative impact on 'the price of consumer goods'. Respondents have clear concerns about the possible negative impact of Brexit on the cost of living and their ability to absorb additional costs.

### **Varying perspectives across gender, age, and border/non-border residents**

Across a number of themes covered in the survey, the most apparent determinants of response were gender, age, and proximity to the border between NI and ROI.

Women were more likely to expect Brexit to have a negative impact than men; most notably in relation to the price of consumer goods, food and travel related issues. Those in younger age categories also repeatedly emerged as more pessimistic about the likely outcomes of Brexit than those in the oldest age category.

Those living in border areas were also more likely, broadly, to expect a negative impact from Brexit and differed considerably in their priorities than those living in non-border areas. Issues of particular concern and interest to those in border areas were around travel in ROI and between NI and ROI, postal services and energy supply.

### **Preparations and information about Brexit**

In general, few respondents had undertaken or planned to undertake any actions in preparation for Brexit. The actions most likely to have been undertaken were 'delayed booking holidays and flights' (8%) and 'actively saved money in case of future issues' (8%). These actions are consistent with opinions expressed elsewhere about the probability of a negative impact on 'the price of consumer goods' and 'going on holidays abroad' due to Brexit.

In line with concerns around holidays, 'travel information' was considered to be useful by the highest percentage of respondents (40%) compared with the other forms of information listed in the survey. Respondents were also interested in learning more about 'border matters' with 35% saying information of this type would be useful.

Overall, half of respondents wanted to receive information online or via a website, however preferences varied considerably depending on age and disability status. While 63% of 18 to 34 year olds wanted to access the information in this way, this dropped to 36% for over 55s. Popular communication methods among over 55s included leaflets (18%) and newspaper/magazine articles (28%). Similarly 53% of those with a disability wanted to access information online compared to 37% of those without.



## Recommendations

The following recommendations are intended to support the Consumer Council's actions in response to the concerns and priorities raised by consumers through this survey:

- ✓ Given the particularly high levels of concern towards the impact of Brexit amongst those in border areas, the Consumer Council might consider a focused information campaign targeted for these consumers looking in particular at issues around cross border travel, cross border postal services and energy supply.
- ✓ In order to better prepare and reassure consumers, the Consumer Council might consider further research on the likelihood and extent of price increases and, if necessary, how households can make savings to offset these changes.
- ✓ Given the preference for online and website based information, particularly among under 35s, the Consumer Council may consider increasing the number of online resources available on the potential impact of Brexit. These resources could focus on 'travel information' to correspond with the exhibited preferences of this age group.
- ✓ Information delivery could be similarly tailored to consumer preference and priorities elsewhere, for example, where information seen as particularly useful by those 55 and older, could be provided via leaflets and/or newspaper/magazine articles.

# Appendix A: Methodology

The following diagram and subsequent paragraphs provide an overview of the key tasks undertaken as part of this research.

**Figure 3.1: Methodology Overview**

Planning & design	<b>Planning meeting</b>	<ul style="list-style-type: none"> <li>- Discuss scope of research</li> <li>- Agree timetable</li> <li>- Agree reporting arrangements</li> </ul>
	<b>Sample design</b>	<ul style="list-style-type: none"> <li>- Design and agree sample size, and frame</li> <li>- Confirm sample quotas</li> </ul>
	<b>Questionnaire design</b>	<ul style="list-style-type: none"> <li>- Provide assistance to refine draft questionnaire</li> <li>- Conduct pilot</li> <li>- Agree final questionnaire</li> <li>- Set up CAPI</li> </ul>
Implementation	<b>Implementation of main survey</b>	<ul style="list-style-type: none"> <li>- Brief interviewer team</li> <li>- Conduct face-to-face interviews to quota</li> </ul>
	<b>Monitoring</b>	<ul style="list-style-type: none"> <li>- Monitor progress and track response rates</li> <li>- Conduct quality checks</li> </ul>
Analysis & reporting	<b>Analysing</b>	<ul style="list-style-type: none"> <li>- Code open-ended survey questions</li> <li>- Conduct checks on data and run cross tabs</li> </ul>
	<b>Reporting</b>	<ul style="list-style-type: none"> <li>- Prepare draft report</li> <li>- Submit final report</li> </ul>

## Questionnaire design and pilot

Perceptive Insight worked in collaboration with the Consumer Council project team to refine the questionnaire to best meet the needs of the research. We conducted a pilot with 10 participants before launching the main survey. This allow us to identify any ambiguities in the questions, ensure that the questionnaire flowed well, was easily understood by all and could be completed within a maximum of 10 minutes. Findings from this pilot were reported back to the Consumer Council Project Team.

## Implementation

Face-to-face interviewing took place between the 11th February and the 12th of March across 78 sampling points in Northern Ireland using specialised CAPI (Computer Assisted Personal Interviewing) software. A total of 1,004 interviews were completed. Quotas on the number of interviews to be achieved were set based on age, gender, socio-economic status and location so as to be representative of the adult Northern Ireland population.

## Monitoring and quality assurance

All interviewing was conducted by our executive team of interviewers who work to the standards required by the Market Research Society Code of Conduct. In compliance with the externally accredited Interviewer Quality Control Scheme (IQCS), a minimum 10% of all

interviews were back-checked by a supervisor for quality purposes. Consultants also regularly reviewed the data as it was gathered throughout the fieldwork period and in particular at the commencement of the study. These reviews allowed us to pick up and address any issues promptly.

## Data processing, analysis and reporting

The data was processed using survey analysis software. In addition to data integrity checks that form part of the data entry process, we also performed validation checks on the data file (this involved conducting logic checks, ensuring ranges and bases were correct, and checking outlier data for accuracy). At this stage, any open-ended questions were recoded for subsequent reporting to the Consumer Council.

The Consumer Council was first provided with a summary reported in Microsoft PowerPoint presenting the headline findings of the survey in charted format. The present report constitutes the final written report analysing in more depth the findings under each of the headings included in the study. Findings within the report have been broken-down by key breaks, as agreed in conjunction with the Consumer Council Project Team. We have sought to highlight in particular the views of consumers residing in the border.

## Who took part?

A total of 1,004 interviews were completed. The following table provides a breakdown of those interviewed as part of the survey:

STRATIFICATION VARIABLE		% OF NI POPULATION	% OF INTERVIEWS ACHIEVED
AGE	18-34	29%	29%
	35-54	35%	35%
	55+	36%	36%
GENDER	Male	49%	49%
	Female	51%	51%
SEG*	ABC1	50%	50%
	C2DE	50%	50%
LOCATION	Belfast	18%	18%
	Armagh, Banbridge and Craigavon	11%	12%
	Newry, Mourne and Down	9%	8%
	North Down and Ards	9%	9%
	Derry and Strabane	8%	8%
	Mid Ulster	8%	8%
	Causeway Coast and Glens	8%	7%
	Antrim and Newtownabbey	8%	8%
	Lisburn and Castlereagh	8%	8%
	Mid-East and Antrim	8%	8%
	Fermanagh and Omagh	6%	7%
URBAN/RURAL*	Urban/mixed	64%	67%
	Rural	36%	33%
DISABILITY	Disability	21%	20%
	No disability	79%	81%