



IMPACT OF COVID-19 SURVEY RESULTS

JERSEY,
GUERNSEY,
ISLE OF MAN

October 2020

1. A snapshot of our islands
(October 2020)
2. Changes amongst our
tracking sample
(October vs June 2020)

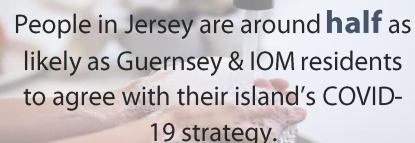


IMPACT OF COVID-19: KEY FINDINGS

The latest survey was conducted W/C 26 October – as restrictions tightened in the UK, Guernsey announced an identified cluster of cases and before news of the vaccine.

STRATEGY & THREAT

- 80% of people in Guernsey and the Isle of Man agree with their island's strategy, compared to 42% in Jersey.
- In all three islands, the risk to the UK is perceived to be much greater than to their own island.
- Those in Jersey feel the least comfortable going out for leisure e.g. to eat out, to events or to use sports facilities.

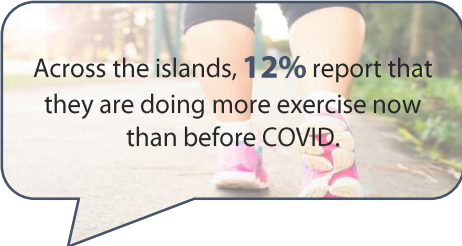


People in Jersey are around **half** as likely as Guernsey & IOM residents to agree with their island's COVID-19 strategy.

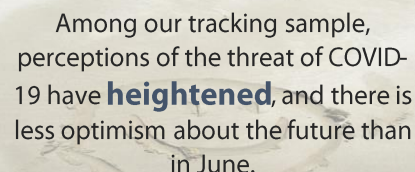
WELLBEING

Across the Crown Dependencies:

- Just over a third (36%) of people rate their life satisfaction as 8 or more out of 10, and are said to be 'thriving' (39% Guernsey; 44% Isle of Man and 25% in Jersey).
- 12% report that they are doing more exercise than before COVID.
- Around a quarter of people (24%) say they experienced a moderate or large amount of stress/anxiety in the week prior to the survey. Just under half (47%) of these said news about COVID-19 was a cause.
- Those in Jersey are slightly more likely than those in Guernsey or the Isle of Man to say that in the last week they have: not felt optimistic about the future; lacked companionship; experienced a large amount of stress; and of those, say news about COVID and/or financial pressures is a cause of stress.
- Among the respondents in our tracking sample, since June, perceptions of the threat of COVID-19 have heightened, there is less optimism about the future, and news about COVID-19 is more likely to be a source of stress.



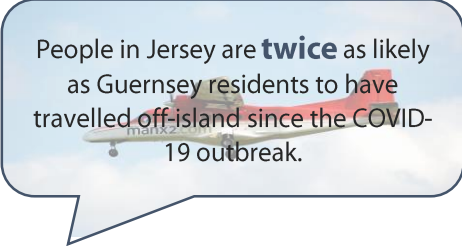
Across the islands, **12%** report that they are doing more exercise now than before COVID.



Among our tracking sample, perceptions of the threat of COVID-19 have **heightened**, and there is less optimism about the future than in June.

TRAVEL

- 32% of those in Jersey reported travelling off-island for any reason since the outbreak of COVID-19. This is around twice that seen amongst Guernsey residents (15%) and Isle of Man residents (17%).
- Around 24% of people in Jersey are comfortable travelling off-island for non-essential travel such as visiting family & friends, compared to 12% in Guernsey and 14% in the Isle of Man.



People in Jersey are **twice** as likely as Guernsey residents to have travelled off-island since the COVID-19 outbreak.



IMPACT OF COVID-19: KEY FINDINGS

HOUSEHOLD INCOME

- The percentage of people who had experienced any (i.e. some or substantial) reduction in their income was: 17% in Guernsey, 20% in the Isle of Man and 23% in Jersey.
- The majority of people told us that COVID-19 has had no or minimal direct impact on their household income. Those more likely to have experienced a loss of household income are aged under 65, in a household that has one or more children under 16 years, have an annual household income of under £40k, be self-employed or part-time employed, as well as those furloughed/not working due to COVID-19.
- Among the respondents in our tracking sample, since June, the proportion of respondents who experienced a loss of household income in the last week due to COVID-19 has decreased.

1 in 5 people across the three islands experienced a loss of household income in the week prior to the survey due to COVID-19. The situation has **improved** since June amongst our sample of tracking respondents.

WORK & BUSINESS

Of those who are economically active across the Crown Dependencies:

- 32% said they had experienced an increased demand at work compared to this time last year
- 22% had experienced a reduced demand for their products/services, and 1% said activity was suspended or their business closed. The results suggest non-essential retail and hospitality & leisure are hardest hit.
- People in Guernsey are least likely to report reduced demand for products/services at their place work (17% in Guernsey vs 24% in the Isle of Man vs 26% in Jersey).
- Among the respondents in our tracking sample, since June:
 - The proportion who say demand at their place of work has reduced compared to this time last year has decreased in Guernsey and the Isle of Man, with no notable change in Jersey.
 - Respondents working in the construction sector across the three islands have seen a recovery in demand.
 - There is some indication that there are small improvements for respondents working in non-essential retail; while the situation has not improved for respondents working in hospitality and leisure.

22% of economically active residents across the Crown Dependencies reported reduced demand for products/services compared to this time last year.

Of the three islands, people in Guernsey are **least** likely to report reduced demand.

Construction workers in our tracking sample have seen a recovery since June, while those in non-essential retail and hospitality & leisure remain the hardest hit.



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IMPACT OF COVID-19: A SNAPSHOT OF OUR ISLANDS, OCTOBER 2020

INTRODUCTION

Island Global Research undertook an online survey in October 2020 to understand the impact of COVID-19 on islanders in Jersey, Guernsey and Isle of Man.

Our aim was understand how the population across the three islands are currently being impacted by COVID-19 across a range of dimensions.

The results presented here are representative of the population, and due to a difference in sampling methodology are not comparable with the tracking results previously published. See section 2 of this report to understand how the impact of COVID-19 has changed since June 2020 amongst our tracking sample.

About this survey

Responses were collected between 26 October and 1 November 2020. The survey was conducted online and was open for a week.

The survey was made available to our panel of research respondents, as well as advertised to residents online via social media channels and our website.

The survey was completed by 3171 residents across the Crown Dependencies (1063 in Jersey, 1168 respondents in the Bailiwick of Guernsey, 940 in the Isle of Man).

Our motivation

We feel it is important to record the impact of COVID-19 on our islands.

From time to time, we undertake our own research that will be of interest to people living in Jersey, Guernsey and the Isle of Man. This is one of our surveys, and is an opportunity for us to give back to the Island Communities who participate in our market research. We hope that you find the results interesting and that they are useful for those living and working within the islands.

We would also like to thank the media and others who have helped to disseminate the results and raise awareness of the research we were conducting. Please get in touch if you are interested in additional analysis.

THANK YOU FOR TAKING PART

**An online survey completed by
3171 residents
across the Crown Dependencies**



1063 residents in
Jersey



1168 residents in the
Bailiwick of Guernsey



940 residents in the
Isle of Man

About Island Global Research

Island Global Research is a market research and consultancy company with experience in both quantitative and qualitative research methods. We regularly conduct market research for clients in the Crown Dependencies.

We are very grateful to everyone who completes our surveys. If you would like to participate in our surveys or hear more from us, please go to our website to find out more:

www.islandglobalresearch.com.

Island Global Research is part of the BWCI Group, a member of Abelica Global.



IMPACT OF COVID-19: A SNAPSHOT OF OUR ISLANDS, OCTOBER 2020

METHODOLOGY

Questionnaire

In designing the questionnaire we sought to strike a balance between the range of dimensions asked about and looking deeper into key issues.

Context

Just prior and during the period of data collection the following events of note happened:

- Isolated community cluster of positive COVID-19 cases reported on in Guernsey, with source to be identified (this outbreak remained isolated).
- Air-bridge between Isle of Man and Guernsey suspended, with repatriated Manx residents told to self-isolate for 14 days upon return to the Isle of Man.
- Local lockdowns more widely introduced in the UK (national lock down yet to be announced).
- Changes to self-isolation and testing requirements for travelers upon entry to Guernsey and Jersey.
- News of the vaccines were not yet reported

Topics included:

- Perceived threat of COVID-19
- Wellbeing and impact on lifestyle
- Household income
- Work and business
- Travel plans and air-bridges
- Exit strategies
- Whether comfortable to resume a range of activities

Profile of respondents

In this section we report results that are representative of the population of the islands. This is due to the profile of the sample after weighting, as well as the size of the sample:

Weighting

The profile of people who completed the survey was compared to the latest available data on the populations of each island. We used survey weights to correct for age and gender differences between the sample and the population.

This is a standard statistical technique that helps compensate for different patterns of non-response from different sub-groups of the population, such that survey results can be generalised from the sample back to the population from which they are drawn.

Fewer young people completed the survey and more females participated in the survey than males, however, the survey was completed by a wide range of the people and the differences are relatively small with the largest weights for younger males capped at 3.0.

Please get in touch for more information about the profile of respondents and survey weighting.

Sample Size

The achieved sample size of around 1000 per island gives a margin of error of around $\pm 3\%$ for overall results for each island (95% confidence interval).

Base sizes for each question vary, please get in touch for more detailed information about the base size and margin of error around specific statistics.



IMPACT OF COVID-19: STRATEGY & THREAT

(RESPONSES W/C 26 OCTOBER 2020)

We asked respondents about their island's COVID-19 strategy; their perception of the threat from; and how comfortable they feel undertaking different activities in their island.

- 80% of people in Guernsey and the Isle of Man agree with their island's strategy, compared to 42% in Jersey.
- In all three islands, the risk to the UK is perceived to be much greater than to their own island.
- Those in Jersey feel the least comfortable going out for leisure e.g. to eat out, to events or to use sports facilities.

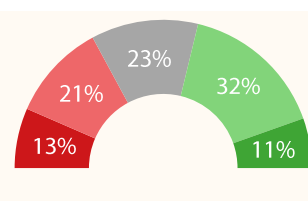
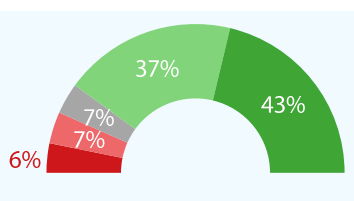
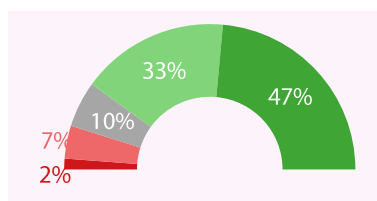
GUERNSEY

ISLE OF MAN

JERSEY

Do you agree or disagree with the statement "the strategy my island is taking in response to COVID-19 is the right approach"?

- Strongly disagree
- Disagree
- Neutral
- Agree
- Strongly agree



% who perceive COVID-19 to pose a high or very high level of threat to...

Themselves, personally

26%

27%

32%

Their island

40%

36%

47%

The UK

84%

80%

78%

* rated out of 10, where 7 & 8 = high; 9 & 10 = very high

% who feel fairly/very comfortable doing the following activities...*

Meeting family & friends

22%

72%

18%

74%

47%

32%

Going to shops for non-essential items

29%

63%

20%

73%

45%

27%

Going to cafes & restaurants

31%

61%

22%

71%

43%

24%

Going to bars & nightclubs

25%

47%

18%

62%

14%

17%

Going to public, music or sporting events

30%

43%

19%

56%

9%

13%

Using indoor sports & leisure facilities

25%

50%

20%

63%

22%

19%

** % fairly comfortable = lighter shade; % very comfortable = darker shade; don't know and not applicable were excluded

To see more results: www.islandglobalresearch.com/news

The October 2020 survey was completed by 3171 residents in the Crown Dependencies. (1168 Guernsey, 1063 Jersey, and 940 Isle of Man).



IMPACT OF COVID-19 ON WELLBEING ON OUR ISLANDS

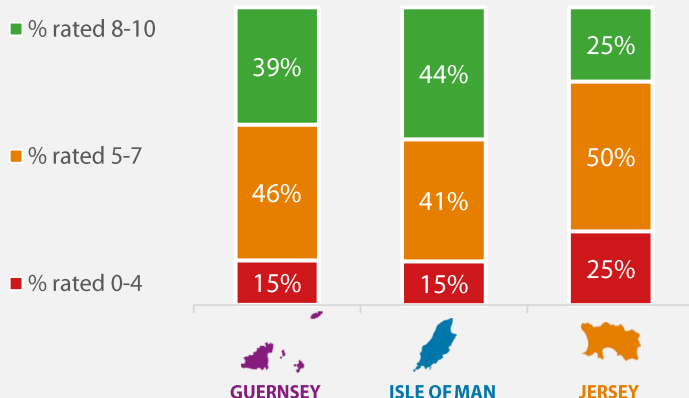
(RESPONSES W/C 26 OCTOBER 2020)

We asked respondents about their life satisfaction and wellbeing, including physical activity, optimism for the future and loneliness. Across the Crown Dependencies:

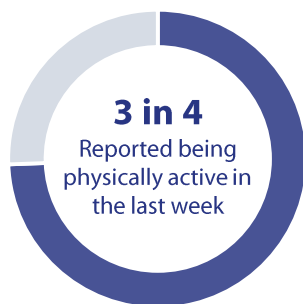
- Just over a third (36%) of people rate their life satisfaction as 8 or more out of 10, and are said to be 'thriving'. (39% Guernsey; 44% Isle of Man and 25% in Jersey).
- 12% report that they are doing more exercise than before COVID.
- Just under half (47%) of those who experienced a moderate or large amount of stress/anxiety said news about COVID-19 was a cause.
- Those in Jersey are slightly more likely than those in Guernsey or the Isle of Man to say that in the last week they have: not felt optimistic about the future; lacked companionship; experienced a large amount of stress; and of those, say news about COVID and/or financial pressures is a cause of stress.

How satisfied do you feel with your life right now?*

(0 is worst possible life, and 10 is the best possible life)

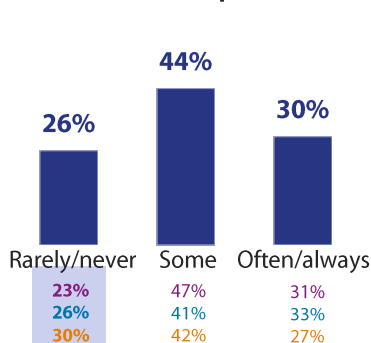


*Based on Cantril's Ladder

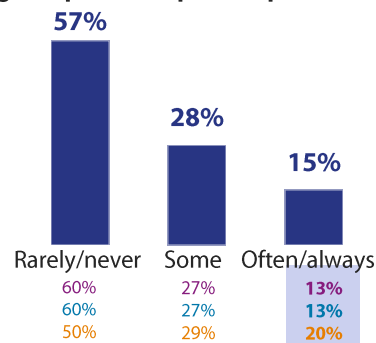


12% of people are doing more exercise than before COVID

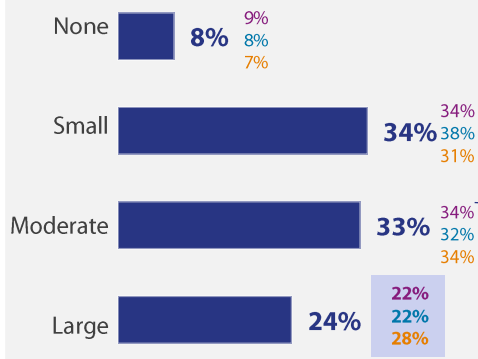
How often did you feel optimistic about the future in the past week?



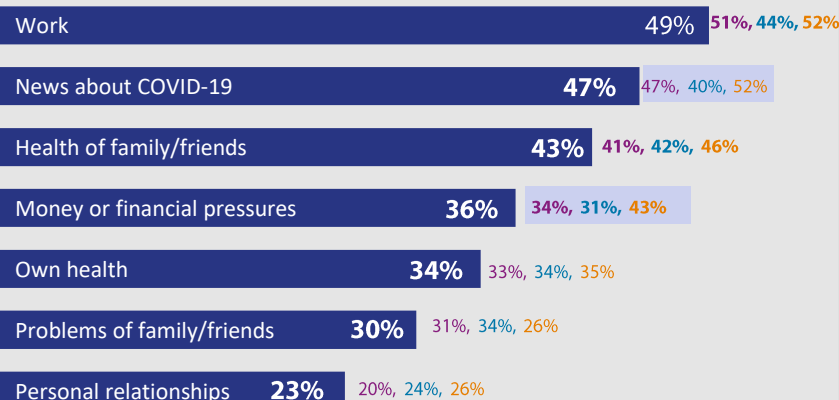
How often did you feel lonely, isolated or lacking companionship in the past week?



What amount of stress or anxiety have you experienced in the past week?



Of those who experienced a moderate or large amount of stress/anxiety, % who selected ... as a cause



To see more results: www.islandglobalresearch.com/news

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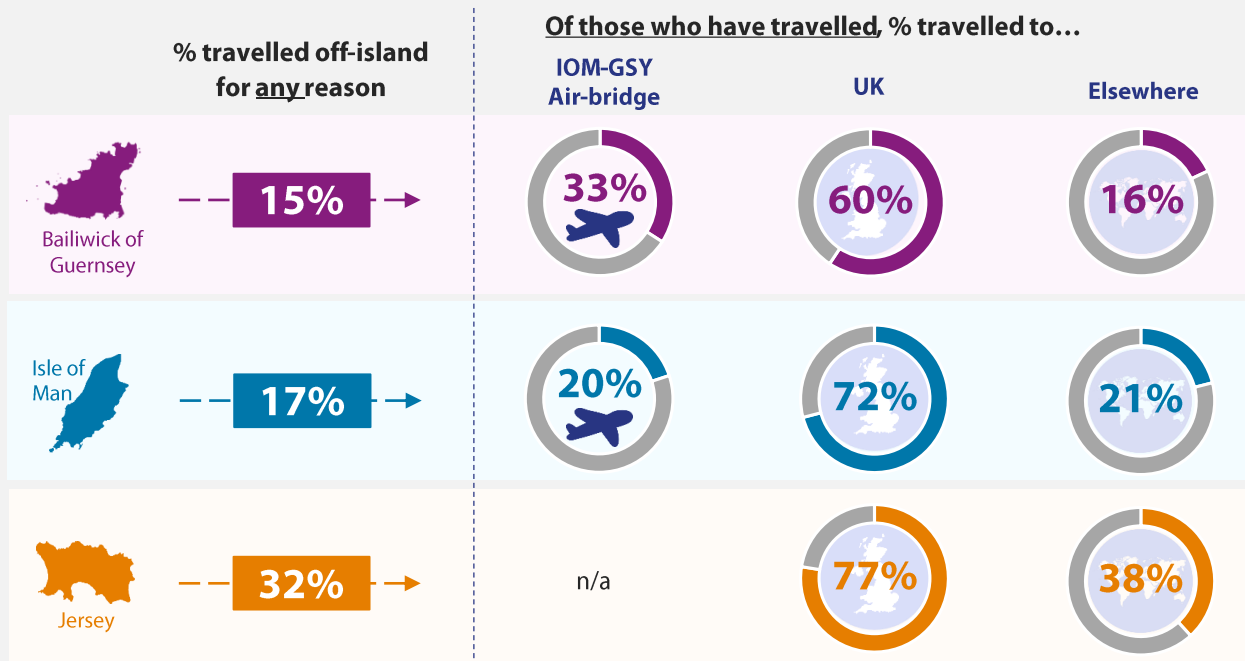


IMPACT OF COVID-19: TRAVEL

(RESPONSES W/C 26 OCTOBER 2020)

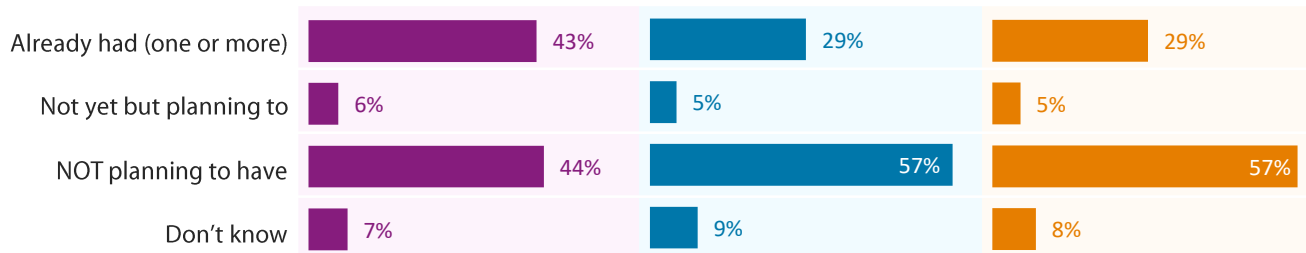
ALL OFF-ISLAND TRAVEL

Have you travelled away from ... since the COVID-19 outbreak?



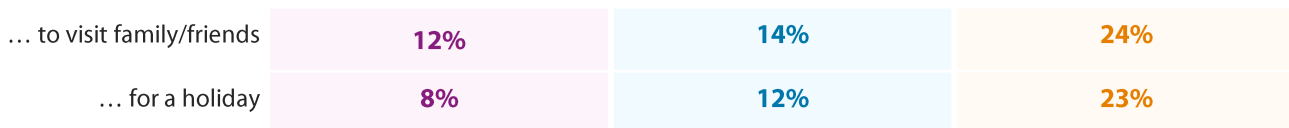
STAYCATIONS

Have you had a staycation in 2020?

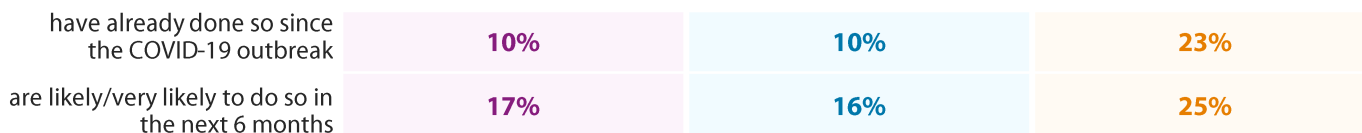


NON-ESSENTIAL OFF-ISLAND TRAVEL

% who feel fairly or very comfortable travelling off-island for non-essential travel...*



% who ... travel off-island for non-essential travel



* don't know and not applicable were excluded

The October 2020 survey was completed by 3171 residents in the Crown Dependencies. (1168 Guernsey, 1063 Jersey, and 940 Isle of Man).



IMPACT OF COVID-19 ON HOUSEHOLD INCOME

(W/C 26 OCTOBER 2020)

We asked respondents in Jersey, Guernsey and the Isle of Man whether COVID-19 has had a direct impact on their household income over the past week. As of October 2020:

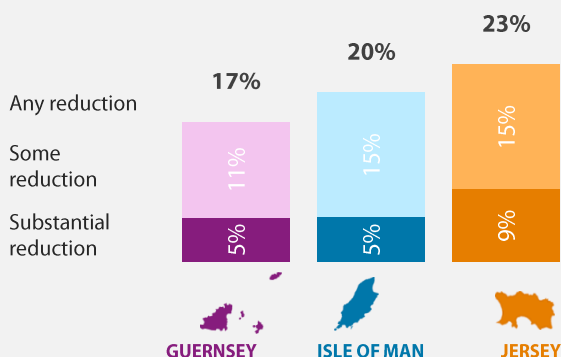
1 in 5



1 in 5 people across the three islands (20%) experienced a loss of household income in the past week due to COVID-19.

- The percentage of people who had experienced any (i.e. some or substantial) reduction in their income was: 17% in Guernsey, 20% in the Isle of Man and 23% in Jersey.
- The majority of people told us that COVID-19 has had no or minimal direct impact on their household income. Less than 5% said their household income had increased.

% with reduction in household income in the past week



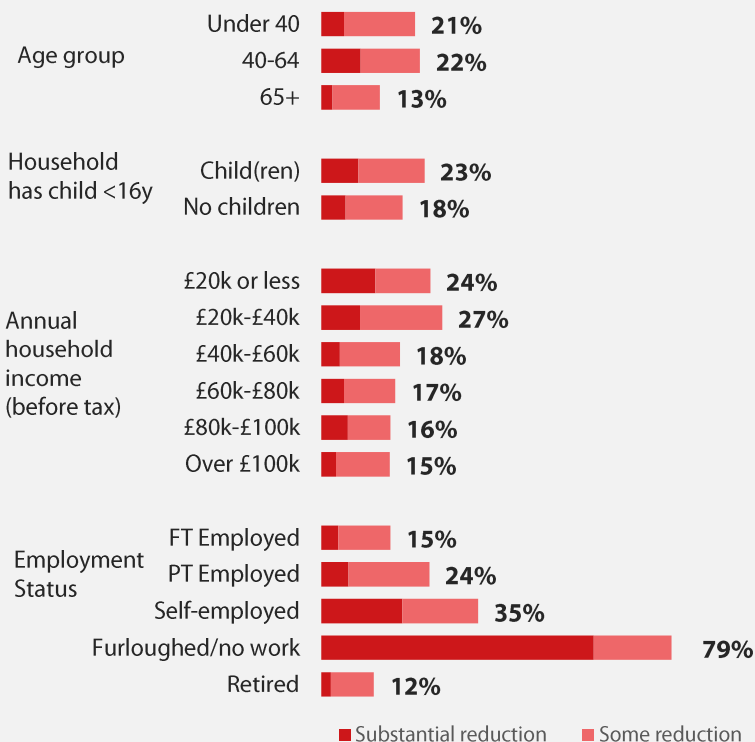
Sub-group analysis helps to identify the characteristics of those more likely to have experienced a loss of income.

Those more likely to have experienced a loss of household income are:

- aged under 65,
- in a household that has one or more children under 16 years,
- have an annual household income of under £40k,
- be self-employed or part-time employed, as well as those furloughed/not working due to COVID-19.

It is also notable that 35% of those who rated their life satisfaction 0-4 reported a reduction in income vs 10% of those who rated life 8-10.

% with reduction in household income in past week



To see more results:

www.islandglobalresearch.com/news

The October 2020 survey was completed by 3171 residents in the Crown Dependencies. (1168 Guernsey, 1063 Jersey, and 940 Isle of Man).



IMPACT OF COVID-19 ON WORK AND BUSINESS

(W/C 26 OCTOBER 2020)

We asked those who are economically active (i.e. employed, self-employed, furloughed or not working due to COVID-19) about the impact of COVID-19 on their work and business.

32% said they had experienced an increased demand, however 22% had experienced a reduced demand for their products/services, and 1% said activity was suspended or their business closed.

By sector across the Crown Dependencies, the results suggest non-essential retail and hospitality & leisure are hardest hit.

People in Guernsey are less likely to report reduced demand for products/services at their place of work (17% in Guernsey vs 24% in the Isle of Man 26% in Jersey).

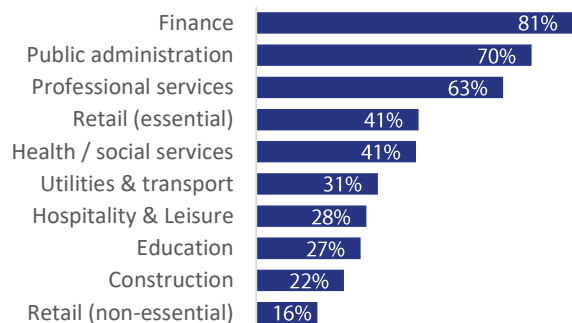
In all three islands, around half of those with reduced demand believe it will take more than a year to return to pre-COVID levels or that demand will never return.



Said their employer had made changes to working practices due to COVID-19.

52%

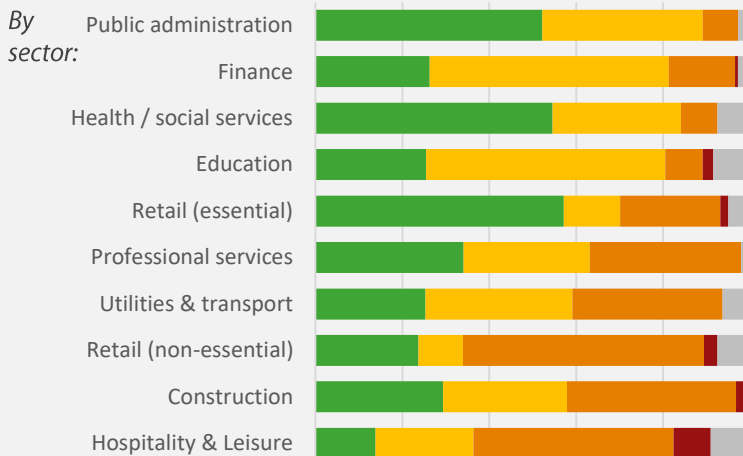
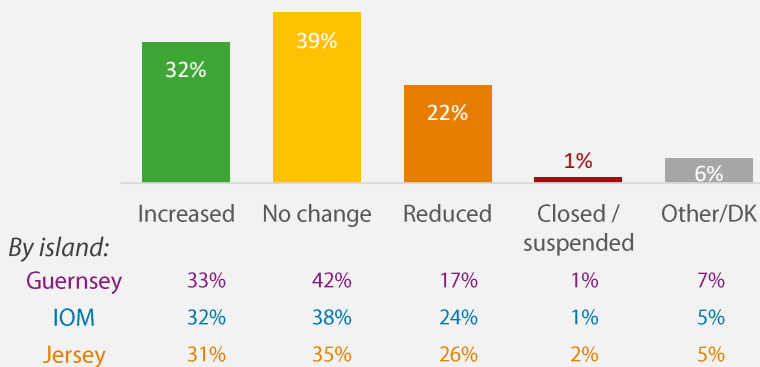
Those working in finance, public administration and professional services are most likely to say their place of work has made changes to working practices:



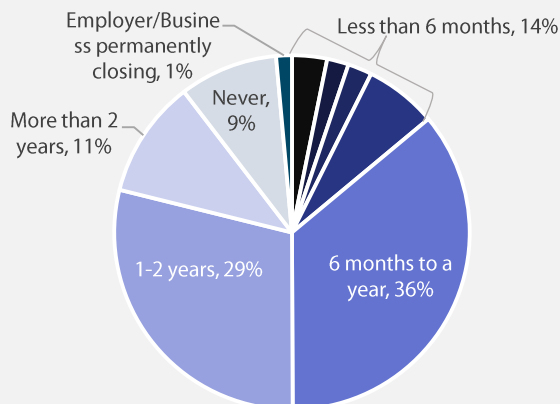
Examples given include:

- Working from home (most common)
- Change in hours or pay
- Heightened sanitation and an increase in procedures
- Preparation / training for working online

At your place of work, how would you describe the current level of demand for products/services compared to this time last year?



OF THOSE WITH REDUCED DEMAND / SUSPENSION:
When do you think demand for products/services will return to "pre-COVID" levels?





IMPACT OF COVID-19: CHANGES AMONGST OUR TRACKING SAMPLE

INTRODUCTION

This section of the report compares unweighted results for respondents in our tracking sample collected in October 2020, with those collected in June 2020.

Our aim is to track how the impact of COVID-19 on our sample of respondents is changing over time. The latest survey was conducted as restrictions tightened in the UK, Guernsey announced an identified cluster of cases and before news of the vaccine.

Island Global Research has been undertaking online surveys since March 2020 to track the impact of COVID-19 on islanders in Jersey, Guernsey and Isle of Man. The following pages provide insights into how perceptions of threat, wellbeing, and the negative impact of COVID-19 on household income and demand at work has changed for our sample of tracking respondents between June and October 2020.

About this survey

Responses were collected as part of a series of surveys. The results presented here were collected w/c 22 June and w/c 26 October. The surveys were conducted online with our panel of research respondents, and each survey was open for a week.

These two surveys were each completed by around 1,500 tracking respondents from our research panel across the Crown Dependencies.




Our motivation

As COVID-19 was starting to reach our islands, we felt it was important to record the impact. From time to time, we undertake our own research that will be of interest to people living in Jersey, Guernsey and the Isle of Man. This is one of our surveys, and is an opportunity for us to give back to the Island Communities who participate in our market research. We hope that you find the results interesting and that they are useful for those living and working within the islands.

Please get in touch if you would be interested to know more about this series or are interested in additional analysis.

THANK YOU FOR TAKING PART

Two online surveys each completed by around 1,500 residents from our tracking sample across the Crown Dependencies

	22 – 28 June 2020	26 Oct – 1 Nov 2020
JERSEY		
	475 residents	544 residents
GUERNSEY		
	565 residents	592 residents
ISLE OF MAN		
	394 residents	405 residents

About Island Global Research

Island Global Research is a market research and consultancy company with experience in both quantitative and qualitative research methods. We regularly conduct market research for clients in the Crown Dependencies.

We are very grateful to everyone who completes our surveys. If you would like to participate in our surveys or hear more from us, please go to our website to find out more: www.islandglobalresearch.com.

Island Global Research is part of the BWCI Group, a member of Abelica Global.



IMPACT OF COVID-19: CHANGES AMONGST OUR TRACKING SAMPLE

METHODOLOGY

Questionnaire

In designing the questionnaire we sought to strike a balance between tracking the impact and looking deeper into key issues.

A small number of questions were repeated in every survey for tracking purposes. Some topics of special interest were repeated in selected surveys so as to provide regular updates. In addition, ad-hoc questions were included where topical or more detail was of interest.

Topics included:

- Perceived threat of COVID-19
- Self-isolation and social distancing behaviours
- Wellbeing and impact on lifestyle
- Education
- Household income
- Work and business
- Exit strategies
- Whether comfortable to resume a range of activities

Data collection

Nine surveys were initially undertaken over the three month period between 23 March and the 28 June 2020. Each survey was open for one week. We then undertook a follow up survey in October 2020, which included responses from our original sample of tracking respondents. See below for the full list of dates and tracking sample size.

Each time a survey was launched we contacted our research panels in Jersey, Guernsey and the Isle of Man, inviting them to participate. Links to the survey were also made available on our website, and in the initial 3 months, awareness was also raised through publication of our results, giving other members of the public the opportunity to join the tracker.

We report on the results for the unweighted tracking sample allowing us to monitor changes within this group. The results are not intended to be representative of the total population of each island. Although not everyone completed every survey, the profile of respondents is relatively stable across the surveys and covers a wide cross-section of island residents.

Data collection took place :	Total tracking sample	Jersey tracking sample	Guernsey tracking sample	Isle of Man tracking sample
23 March – 29 March	1388	437	541	410
30 March – 5 April	1831	585	736	510
6 April – 12 April	1595	515	688	392
13 April – 19 April	1728	606	722	400
20 April – 26 April	1528	496	592	440
27 April – 3 May	1684	582	685	427
11 May – 17 May	1560	555	601	404
25 May – 30 May	1436	481	547	408
22 June – 28 June	1434	475	565	395
26 October – 1 November	1541	544	592	405



IMPACT OF COVID-19: CHANGES AMONGST OUR TRACKING SAMPLE

OCTOBER COMPARED TO JUNE 2020

Among the respondents in our tracking sample, since June:

- Perceptions of the threat of COVID-19 have heightened
- There is less optimism about the future and news about COVID-19 is more likely to be a source of stress.

INDICATOR	CHANGE (Percentage-point change since June 2020)			
	CROWN DEPENDENCIES	GUERNSEY	ISLE OF MAN	JERSEY
STRATEGY & THREAT (% of respondents in tracking sample who...)				
Agree their island is taking the right strategy in response to COVID-19	-1	-5	+6	+6
Perceive COVID-19 to pose a <u>high or very high</u> level of threat to their island	↑ +15	↑ +13	↑ +18	↑ +15
Perceive COVID-19 to pose a <u>high or very high</u> level of threat to the UK	↑ +12	↑ +8	↑ +11	↑ +20
WELLBEING (% of respondents in tracking sample who...)				
Rate life satisfaction as 8 or more out 10	↓ -10	↓ -13	-10	-7
Were physically active in the last week	↓ -5	-8	0	-5
Rarely/Never optimistic in the last week	↑ +9	↑ +7	+8	↑ +11
Often/Always lonely in the last week	+2	+2	+1	+4
Experienced a moderate or large amount of stress in the last week	↑ +11	↑ +11	↑ +13	↑ +10
Of these, said news about COVID-19 was a source of stress	↑ +20	↑ +24	+12	↑ +21



Significant
Increase



Significant
decrease

To see more results: www.islandglobalresearch.com/news

The October 2020 survey was completed by 1538 respondents from the tracking sample (455 Jersey, 592 Guernsey, 405 Isle of Man)



IMPACT OF COVID-19: CHANGES AMONGST OUR TRACKING SAMPLE

OCTOBER VS JUNE 2020

Among the respondents in our tracking sample, since June:

- The proportion of respondents who experienced a loss of household income in the last week due to COVID-19 has decreased (although around 1 in 5 of the population are still being affected).
- The proportion of economically active respondents who say demand at their place of work has reduced compared to this time last year has decreased in Guernsey and the Isle of Man (although across the Crown Dependencies around 1 in 5 of this group are still being affected).
- Respondents working in the construction sector have seen a notable recovery in demand.
- Although not statistically significant, there is some indication that; there are some small improvements for respondents working in non-essential retail; while the situation has not improved for respondents working in hospitality and leisure.

INDICATOR	CHANGE (Percentage-point change since June 2020)			
	CROWN DEPENDENCIES	GUERNSEY	ISLE OF MAN	JERSEY
HOUSEHOLD INCOME (% of respondents in tracking sample who experienced a <u>loss</u> of household income in the past week directly due to COVID-19)				
Overall	↓ -13	↓ -16	↓ -13	↓ -11
Self-employed	↓ -29			
Household income £20k or less	-14			
With children in household	↓ -17			
WORK AND BUSINESS (% of respondents in tracking sample who reported <u>reduced</u> demand for products/services at their place of work compared to this time last year)				
Overall	↓ -10	↓ -12	↓ -12	-7
Non-essential retail	-11			
Construction	↓ -35			
Hospitality & Leisure	+12			



Significant
Increase



Significant
decrease

To see more results: www.islandglobalresearch.com/news

The October 2020 survey was completed by 1538 respondents from the tracking sample (455 Jersey, 592 Guernsey, 405 Isle of Man)

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