B&A RESEARCH & INSIGHT

Sign of the Times & TechScape 2019

@banda_ie

behaviour&attitudes

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info@banda.ie Tel: 01 205 7500

www.banda.ie

Sign of the Times 2019

- In this year’s review of consumer trends we have got up close and personal to living in Ireland.

- Using a novel combination of face-to-face and digital qualitative techniques we have captured a ***‘day in the life’*** of Irish citizens.

- The report also draws from B&A published data on the economy, health, technology and shopping providing a comprehensive picture of where we are in 2019.

Main themes

ECONOMY

- Solid ground
- Squeezed by the new normal
- Keeping the show on the road

TECHNOLOGY

- Primed for doubt
- Constant craving
- Selective hearing
- Tech that heals

CULTURE

- Guilt and lip service
- Balance seeking
- Which Ireland do you see?

Economy

Solid ground

- Stable (full) employment.
- Economy doing well – for now.
  - Economic growth reported regularly.
  - ‘Normalising’ of spending. (A sense of ‘release’ for some)
  - Holidays assumed and more frequent.
  - Eating out a regular option.

Annual employment and live register levels are positive

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The Live Register

-15.9%

Overall Change

vs. January 2018

86,473

-14.1%

vs. January 2018

113,154

-17.2%

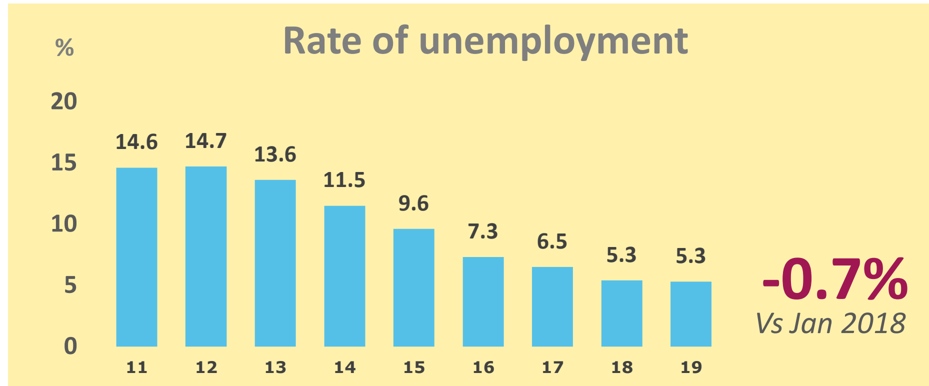
vs. January 2018

Source: www.CSO.ie/Persons on live register

** Live Register Total data*

Unemployment in Ireland

-1.3%



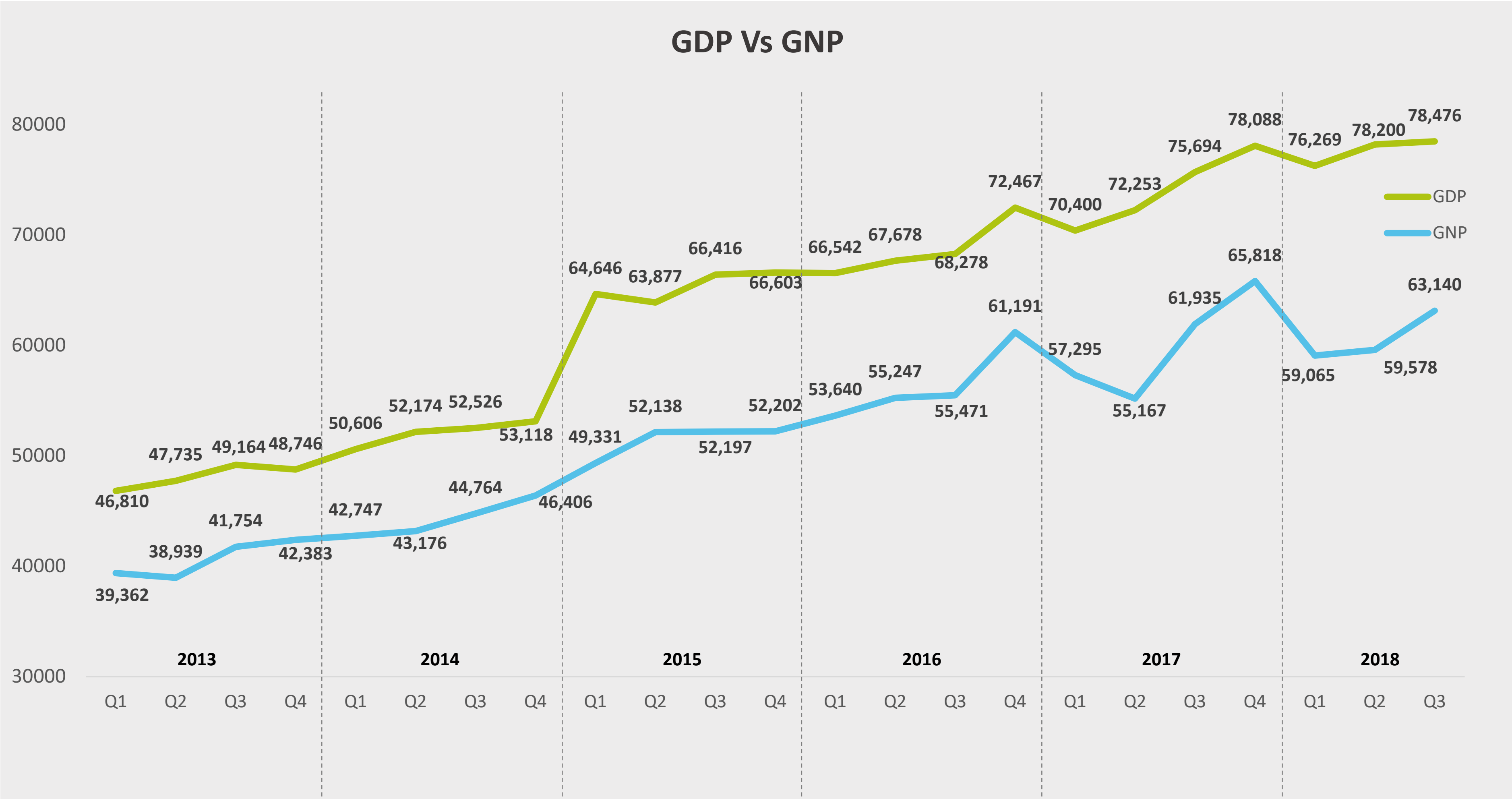
Current Rate of unemployment

(vs. 6.0% in January 2018)

5.3%

Source: www.CSO.ie/Quarterly National Household survey

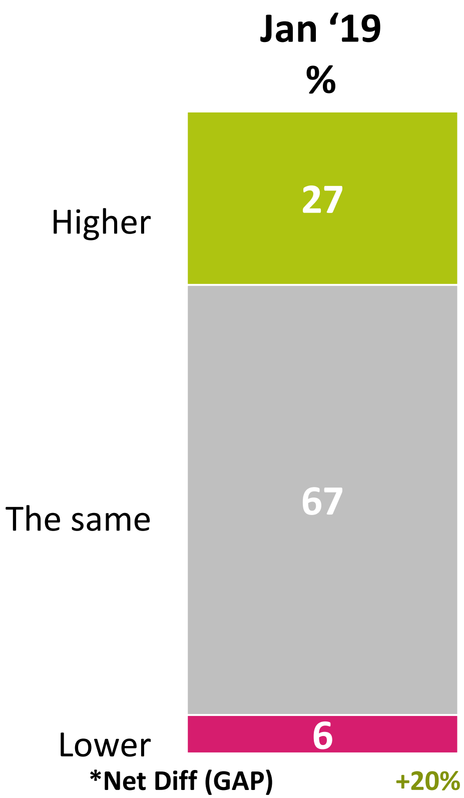
GDP and GNP continue an upward trend

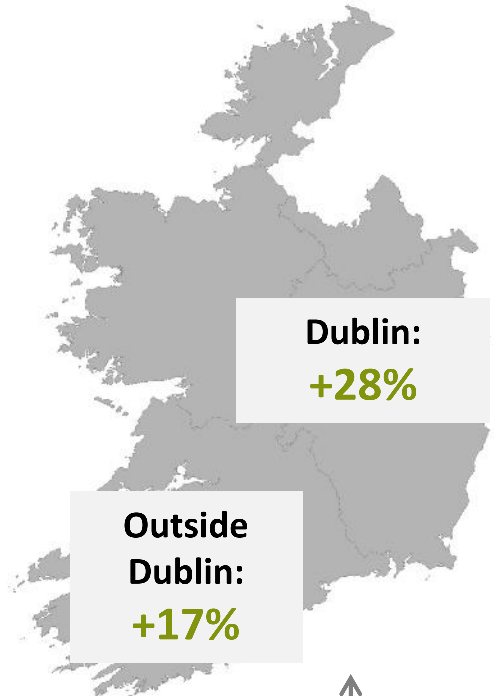


**GDP and GNP data correct as of February 2019*

Source: www.CSO.ie
Quarterly National Accounts
** Q4 2018 results not yet available*

We are more positive about personal assets (house prices)





Both in Dublin and outside people remain positive about the value of personal assets.

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Feb 18	May 18	Jul 18	Sep 18	Nov 18	Jan 19
Gap	+20%	-25%	-53%	-43%	-41%	-31%	-18%	-1%	+14%	+15%	+26%	+25%	+26%	+26%	+24%	+24%	+24%	+20%

Base: All Adults 16+ (1,000)

Q.6 Do you expect your assets (your house, shares, pension entitlements, savings) In the next year to be higher, lower or the same as in the past year?

Squeezed by the new normal

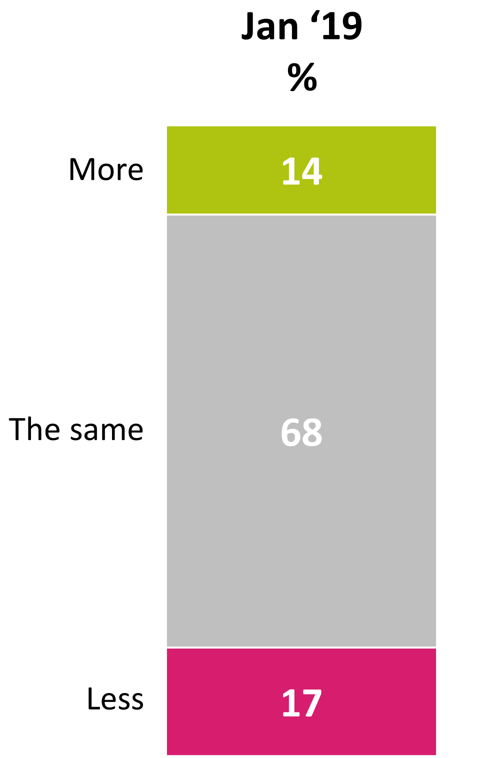
- **Life milestones are in transition**
  - ❖ Creating frictions between generations.
  - ❖ Storing up challenges for the future (who pays for childcare?).
  - ❖ This can leave many feeling a lack of ‘moving forward’
- The age of having a family has been shifting older for many years.
- Other symbols of independence are increasingly important (foreign holiday, a car or our own home).

Our view of life milestones is changing

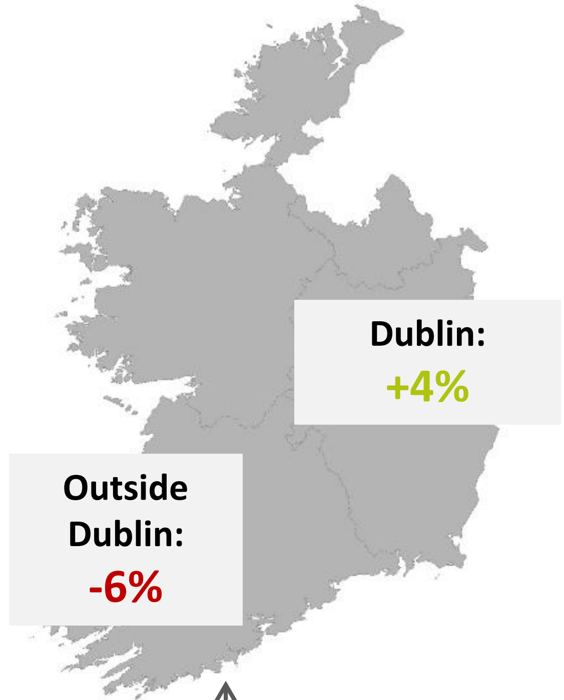
Moving home to save for a deposit is just one sign of this shift.

Base: All Adults 16+ (1,000)

Modest expectations of spending



*Net Diff (GAP) -3%



Those living outside Dublin are least positive towards future spending

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Feb 18	May 18	July 18	Sept 18	Nov 18	Jan 19
Gap	+5%	-29%	-63%	-47%	-52%	-45%	-37%	-19%	-13%	-4%	=	+2%	+1%	+3%	+3%	-3%	+5%	-3%

Base: All Adults 16+ (1,000)

Q.7 In the year ahead, do you expect to purchase more, less or the same amount of goods and services as in the past year?

Keeping the show on the road

- While there is talk of an improved economy, there is also blinkering in this optimism.
- People recognise:
  - Problems with the health service.
  - Continuing homelessness challenge.
  - House prices/rent escalation.
  - Fall out from Brexit.
  - A sense of rising cost of living.
- It seems we are a bit like ‘Dory’ we …. “just keep swimming” in the hope things will workout in the end.

But, who is swimming and who is struggling?

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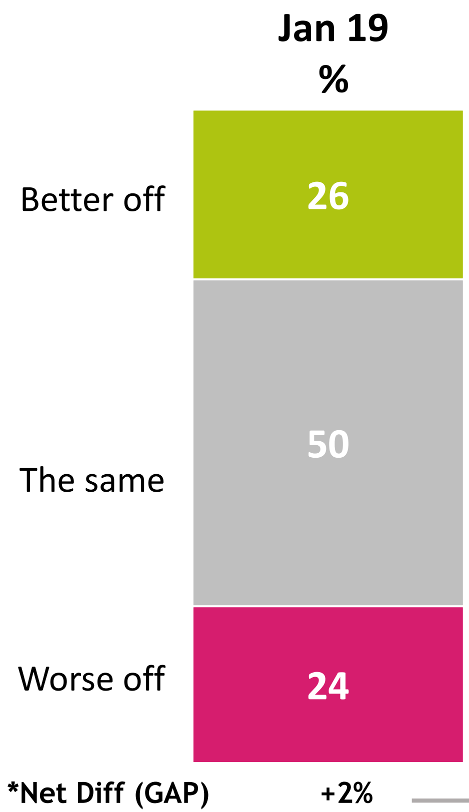
Many see rising costs and significant proportion are feeling no benefit of rising economy

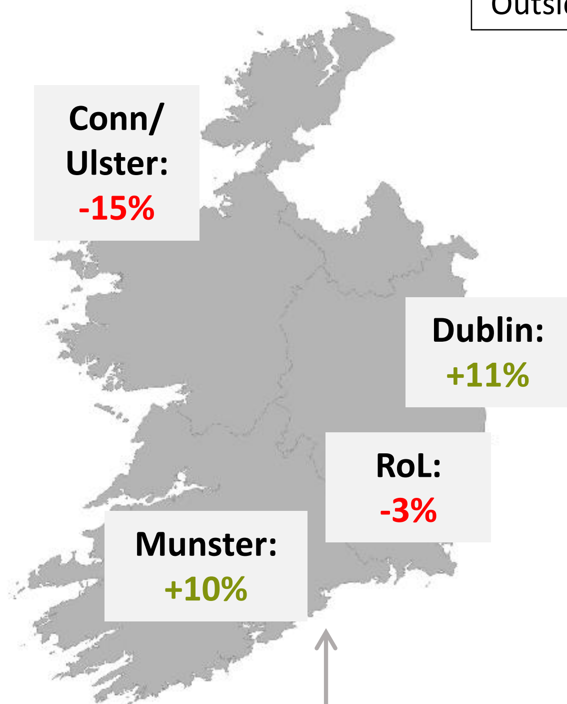
Base: All Adults 16+ (1,000)

In fact consumer confidence in the economy falling



Looking forward

Dublin	+11
Outside Dublin	-1

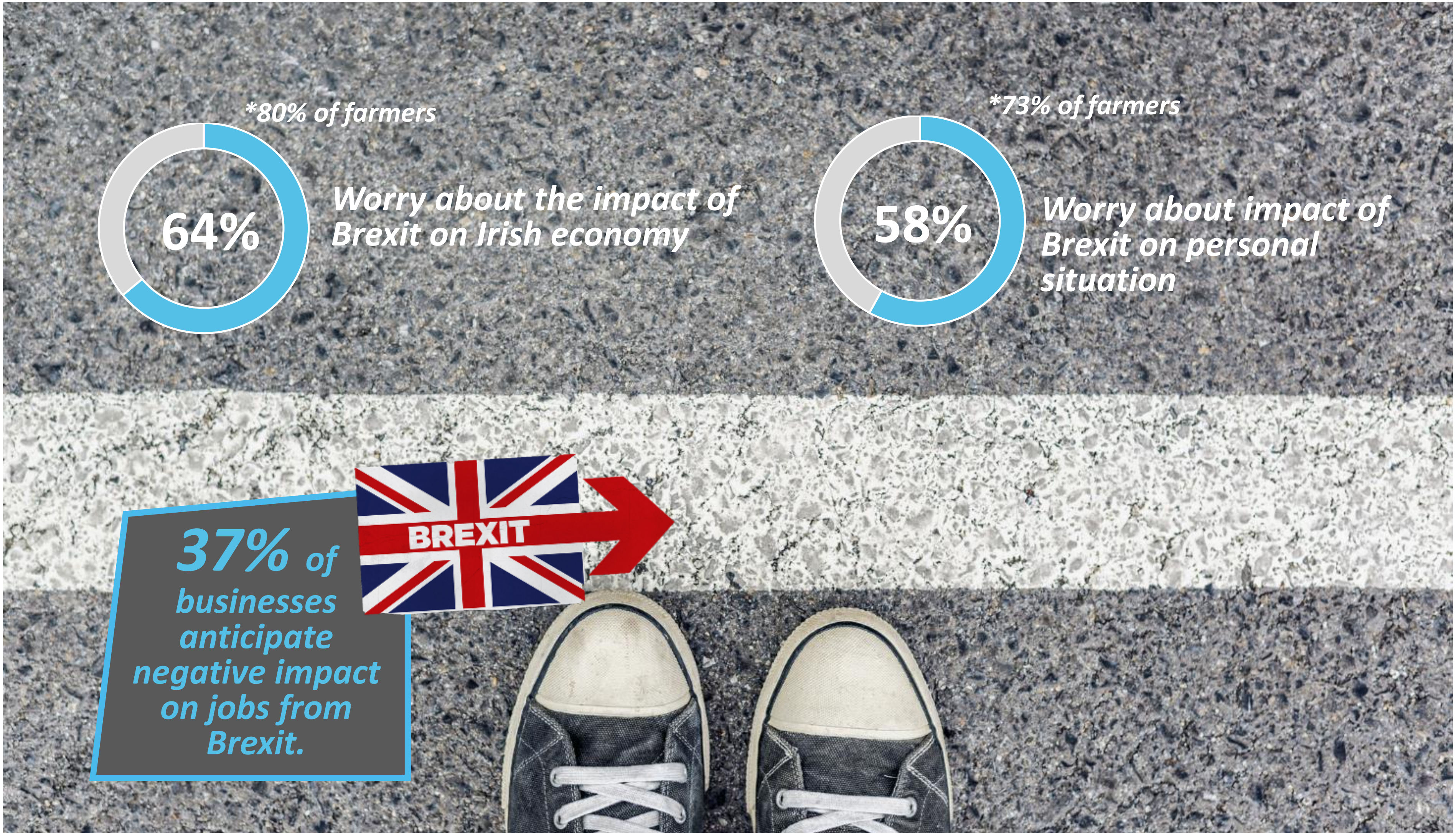


Consumer confidence is strongest in Dublin and Munster regions. Close to the border Conn/Ulster shows significantly lower levels of confidence.

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Feb 18	May 18	July 18	Sep 18	Nov 18	Jan '19
Gap	-15%	-59%	-68%	-49%	-58%	-52%	-32%	+3%	+15%	+18%	+26%	+22%	+28%	+30%	+27%	+17%	+24%	+2%

Base: All Adults 16+ (1,000)

Q.2 And what about the coming year, do you think that the country will be better off, worse off or about the same as this year?



Confidence in the economy has been undermined by Brexit concerns.

Base: All Adults 16+ (1,000)

Technology

We have a love/hate relationship with technology

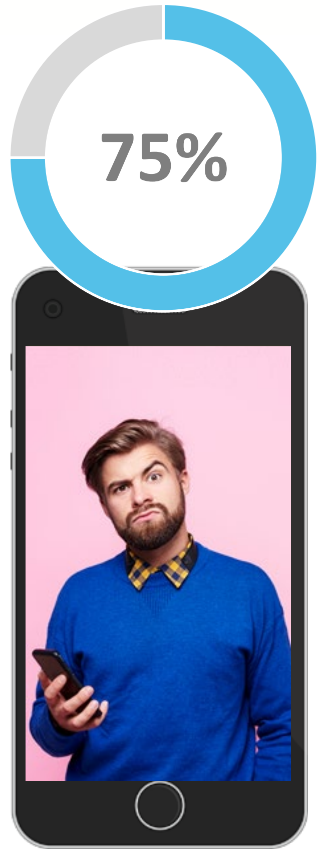
Worry about data privacy online

Base: All Adults 18+ (1,000)

Empty Nesters access the internet everyday

Base: Empty Nesters (271)

Sceptical about what I read online



Base: All Adults 18+ (1,000)

Most of us use it, but have lots of doubts.

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TechScape 2019

March 2019

Prepared by
Anita Mullan and Luke Reaper

@banda_ie

behaviour&attitudes

behaviour&attitudes

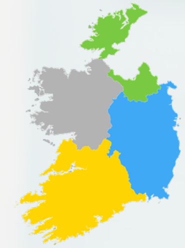
info@banda.ie Tel: 01 2057500

www.banda.ie

J.9516

Introduction

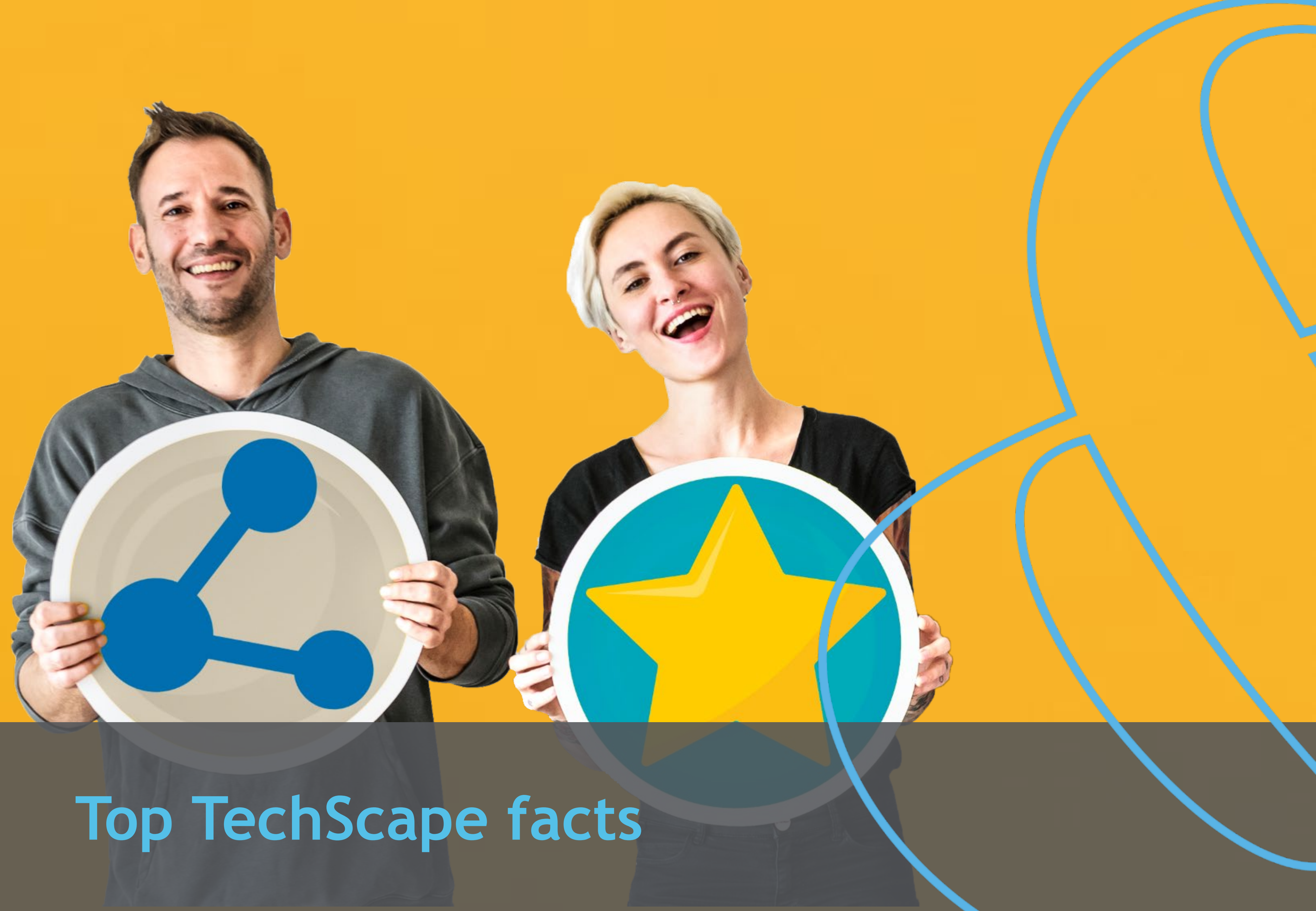
TechScape is conducted on our face-to-face CAPI Omnibus amongst a fully representative sample of 1,000 adults aged 16+ years.



The sample is stratified by age within gender by town size across 63 sampling points nationwide. An overall socio-economic status quota is also applied.

As such, the sample is fully representative of all Irish adults, and not limited solely to the online population.

The fieldwork for this study was conducted between the 17th Jan – 4th Feb 2019



Top TechScape facts

B&A | TechScape

Hot Tech

Smartphone growth

88%

Smart TV growth

55%

13%

Wearable devices

1 in 6 now have a smart hub/home assistant (e.g. Alexa, Google Home, etc.)

16%

Laptops, tablets and e-readers have plateaued

69%

51%

15%

Increasing Netflix usage

NETFLIX 51%

amazon Prime 6%

Netflix was 43% last year

YouTube 66%

Catch up TV 42%

1/3 also connect a device to their TV

½ of us buy online, and **2 in 5** research products on our mobiles in store

½

6 in 10 under 35s follow brands on SM

½ of us are concerned about data privacy online

DATA

For 16-24s Facebook, Instagram, WhatsApp and Snapchat are used most.

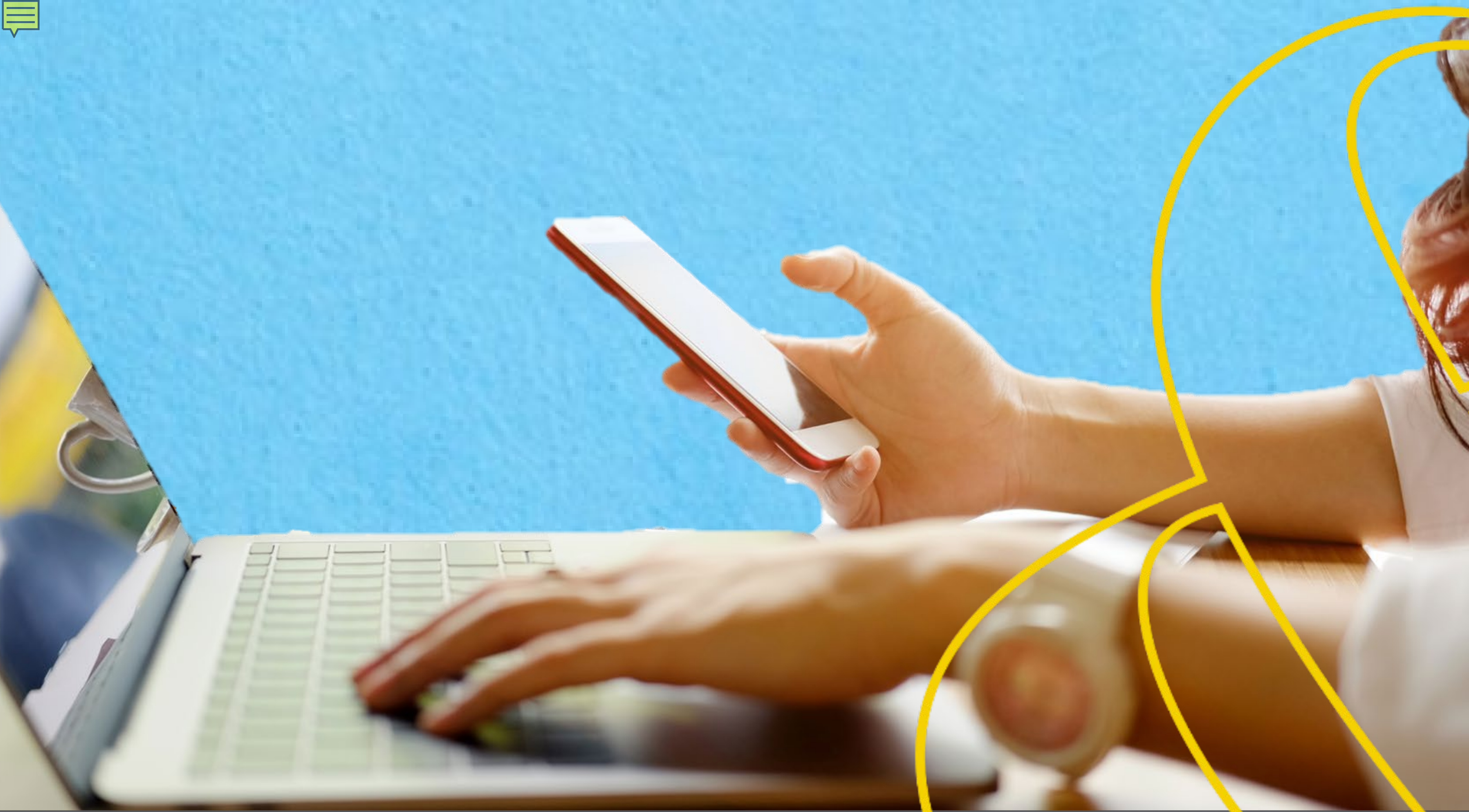
We have a love hate relationship with technology. We're always on but appear to be **trying** to control it, but ***we're addicted***

Social media is impacting the lives of our youth (16-24)

For 16-24s; **1/2** have used it to spy, and have been economical with the truth on SM

59% follow celebrities, YouTubers or Influencers on SM (55% for YouTubers/ Influencers alone)

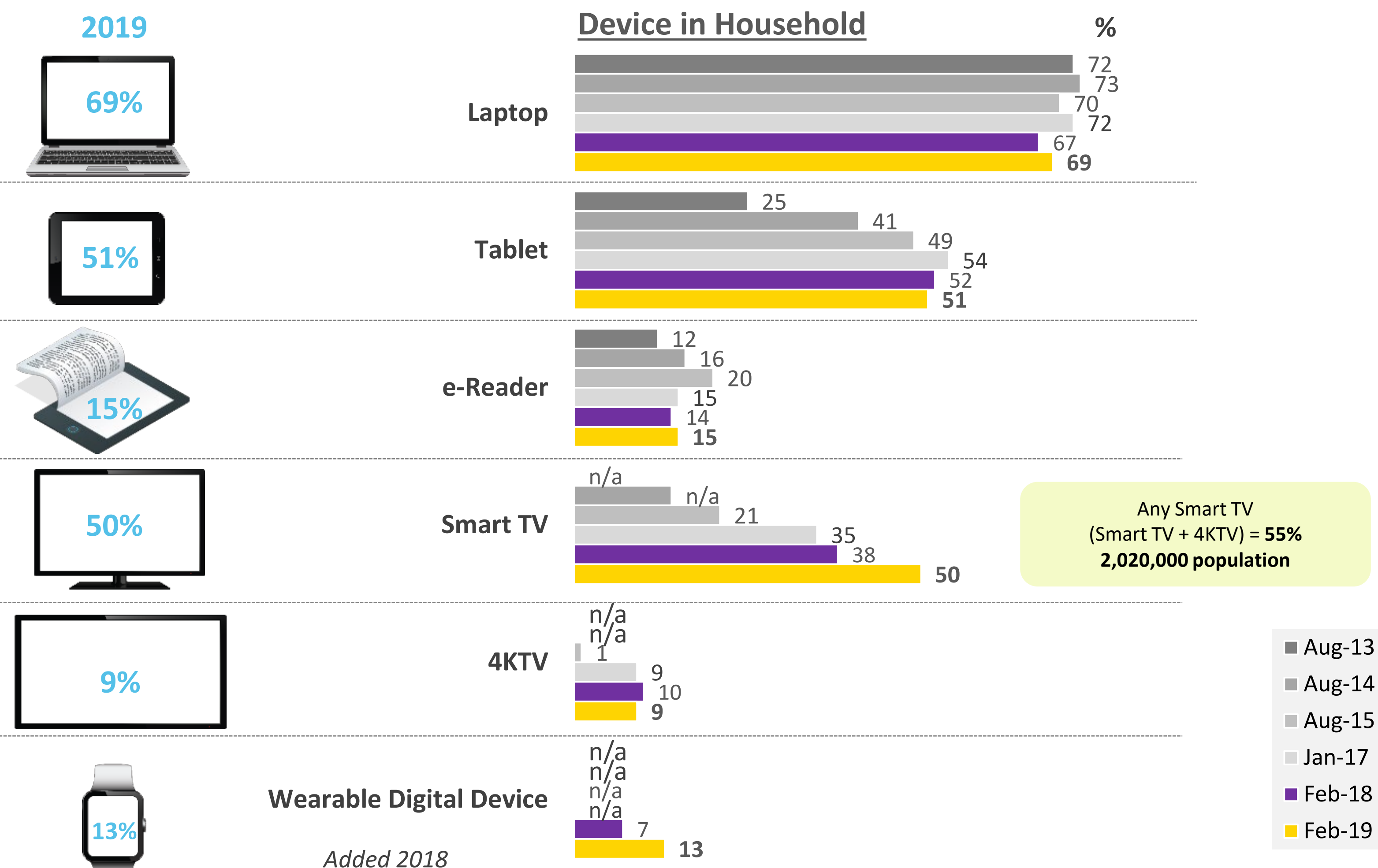
1/4 agree scrolling through SM affects their confidence in a negative way



Devices

Smart TV and wearable devices continue to grow, while e-readers, tablets and laptops plateau

Base: All adults aged 16+ - 1,000



Pre-January 2017 comparable data from eir Connected Living Survey 2015

Plateauing of e-readers, tablets and laptops is evident, while Smart TVs and wearable digital devices continue to increase.

Which of the following devices do you currently use?

Hot kit this year

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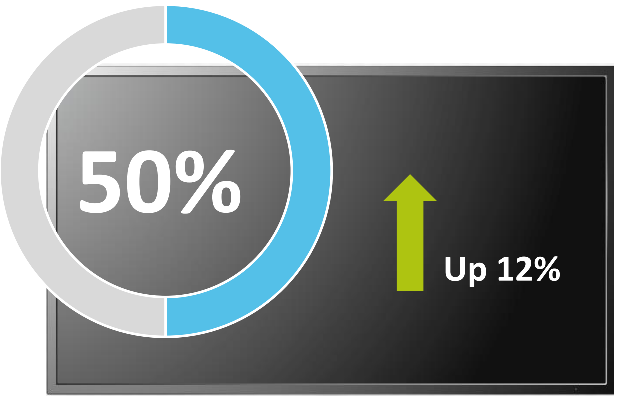
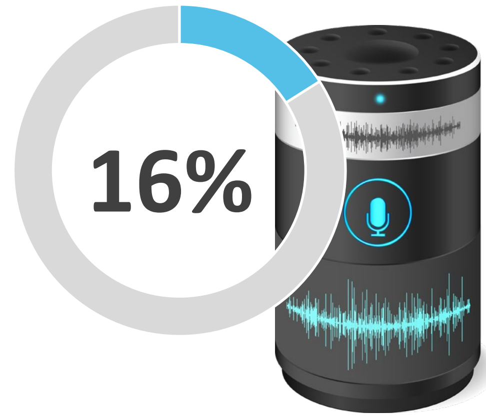
Have a smart TV



Wearable digital device

Home assistant/smart speaker (e.g. Alexa)



Laptops (69%); tablets (51%), e-readers (15%); all static versus last year.

Base: All Adults 16+ (1,000)

Primed for doubt

- We are conflicted about our smartphones
  - Our most constant companion (all day, everyday)
  - The monkey on our back (waste of time, demanding).
- We embrace new habits and apps with glee but also attempt abstinence or digital detox from time to time.
- There is a growing sense of doubt about who is in control
  - Why do those holiday ads appear in your feed when you have just been talking about a holiday?
- Concern about identity theft contributes to caution about online behaviour, especially for Millennials and Gen Z.

Primed for doubt

- In a sense, our attitude to smartphones is coming of age:
  - ❖ We are beginning to realise they are not neutral in our lives.
- The devices are getting in on the act with operating systems helpfully reporting on hours spent on each app.
- Sometimes it takes a while to see things clearly:

- In the 1970s convenience food was **good** because it was convenient.
- By the 1990s we realised our nutritional interests were not aligned with convenience for the sake of it.

- Over 10 years smartphones have become ubiquitous.
- In 2019 we are increasingly aware of their detrimental impact, but have yet to establish what is ‘healthy’ smartphone behaviour.

Constant craving

- There can be a feeling that there is always something better:
  - Whether it is the next YouTube clip
  - Netflix show
  - Or alternative items online (clothes, holidays).
- Whatever choice we make, there is doubt it is the best choice, particularly when peers share gorgeous holiday pics on Instagram.
- We are left in a constant state of mild dissatisfaction, craving something else.
  - No wonder so many have downloaded the 'Headspace' app

1 in 6 (16%) have a smart hub/home assistant e.g. Alexa, Google Home, etc.

606,000 at national population level.

Single	18%
Pre-family	16%
Family pre school	19%
Family pre teen	23%
Family teen	20%
Empty nester	9%

Devices in the household x demographics

Base: All adults 16+ - 1,000

Significantly lower
Significantly higher

	Total	Gender		Age					Social Class		Region				Area	
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1	C2DEF	Dublin	Lein-ster	Mun-ster	Conn/ Ulster	Urban	Rural
UNWTD	*1000*	*490*	*510*	*112*	*155*	*281*	*251*	*201*	*449*	*551*	*275*	*295*	*273*	*157*	*662*	*338*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
- ANY SMART TV	**55**	**52**	**57**	**71**	**62**	**65**	**44**	**31**	**67**	**46**	**63**	**59**	**44**	**51**	**56**	**53**
- ANY ONLINE STREAMING DEVICE	**90**	**89**	**91**	**99**	**100**	**99**	**87**	**61**	**97**	**85**	**93**	**90**	**87**	**88**	**90**	**89**
- ANY ON THE GO DEVICE	**88**	**86**	**89**	**98**	**99**	**98**	**84**	**55**	**95**	**82**	**92**	**88**	**83**	**86**	**88**	**86**
Smart TV set (one that connects directly to broadband and has apps built in – not a 4K TV)	50	48	52	63	61	59	41	26	62	42	51	59	41	49	50	51
Ultra 4K TV set (a TV set that delivers 4 times as much detail as 1080p Full HD – almost photographic in nature)	9	9	9	15	7	10	5	8	12	7	17	7	6	3	10	8
Games Consoles (eg X-box, Wii, PS2/3 /4 etc.)	36	38	34	65	42	49	21	4	45	29	33	44	30	37	35	37
DVD Player or recorder (separate to Virgin box or Sky Plus recording facility)	41	39	42	50	36	45	41	30	46	37	36	46	36	49	37	46
Desktop computer	21	20	22	18	17	21	27	21	29	15	26	16	22	20	21	22
Laptop/Mac	69	68	69	83	83	75	62	39	79	61	79	70	55	69	69	67
iPad or other tablet (including kids tablets such as Kurio, Meep etc.)	51	51	52	61	64	62	44	22	63	43	47	55	47	60	49	56
eReaders (eg Kindle, iRiver, Sony reader etc.)	15	13	17	23	13	18	13	9	21	11	24	14	7	14	16	13
Smart phone (e.g. iPhone, Samsung Galaxy etc.) which is a phone with advanced capabilities, such as the ability to download apps, go online etc.	83	82	84	97	98	96	76	44	91	77	88	85	78	80	84	82
Basic mobile which makes calls as well as sends and receives text messages	28	29	27	25	13	19	33	53	20	34	33	22	23	35	26	31
A digital device that can stream content from the internet on your TV screen (e.g. Apple TV, Chromecast, etc.)	19	18	20	30	23	22	15	6	27	13	18	22	16	22	18	21
Apps on a smart TV	23	21	24	31	29	29	17	6	32	16	15	29	21	27	19	30
A wearable digital device (like an activity wristband, e.g. Fitbit, Smartwatch or smart glasses)	13	11	15	19	16	16	12	3	19	9	14	12	10	20	12	15
Smart Hub/Home assistant (e.g. Alexa, Google Home, etc	16	17	16	27	25	17	11	5	23	13	17	16	18	15	20	10

Which of the following devices do you currently use?

*Potential online OTG device definition: Laptop/iPad, eReader, Smartphone, wearable device

Families with teenage kids have an average 6 potential on the go devices at home

Single	3%
Pre-family	4%
Family pre school	5%
Family pre teen	5%
Family teen	6%
Empty nester	3%

B&A

How we use social media

LOOK AT ME!

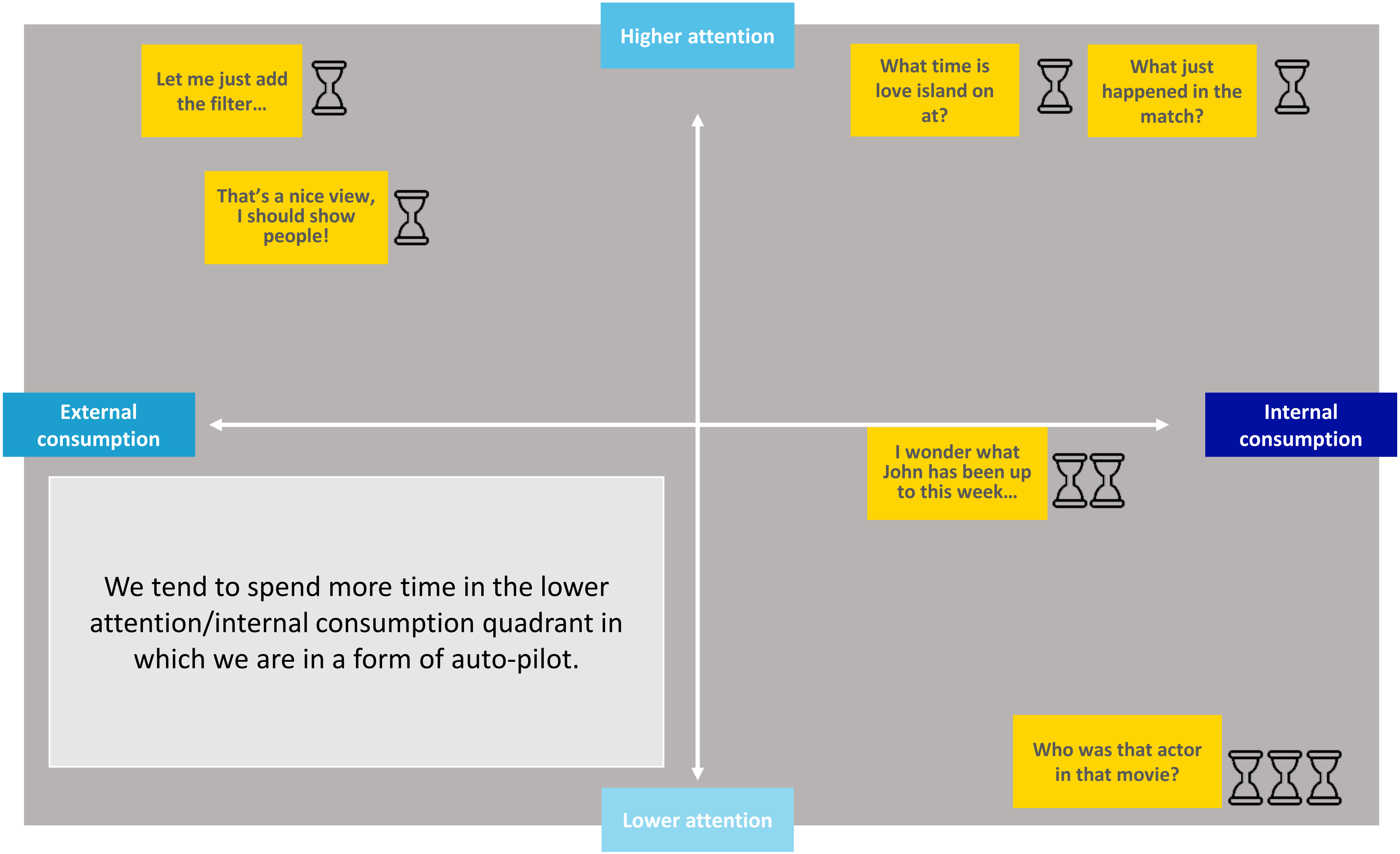
I wonder what...

What’s on?

Mindless scrolling

I need 5 mins..

Casual stuff is creeping into more of our lives…

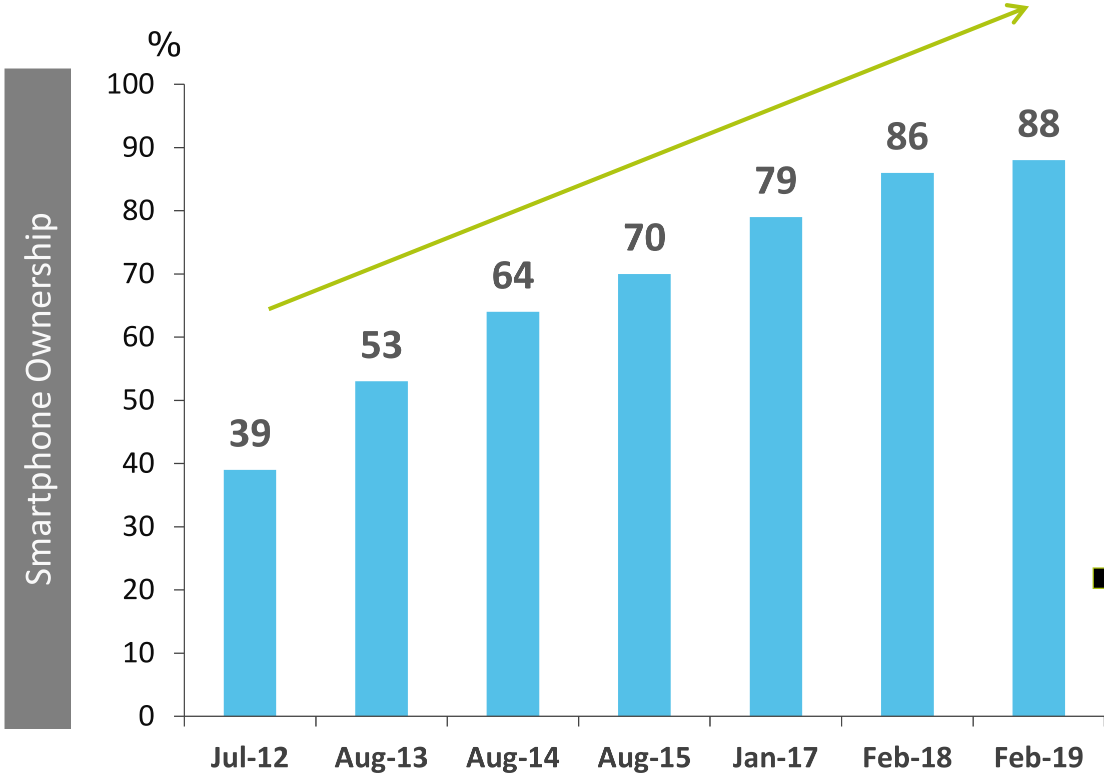


Selective hearing

- There is a feeling peer to peer information is more authentic or ‘democratic’.
- But, online information is often filtered to favour material that reflects our pre-existing viewpoint.
- So, ironically despite the apparent breadth and ‘authenticity’ of sources, we may reinforce rather than shift our thinking because our ‘hearing’ is selective.
  - ❖ Is democracy itself being shifted by this as we have less exposure to (and hence less real understanding of) an opposing view?

Almost 9 in 10 mobile phone users now have a smart phone: 77% among the empty nester segment

Base: All with mobile - 933

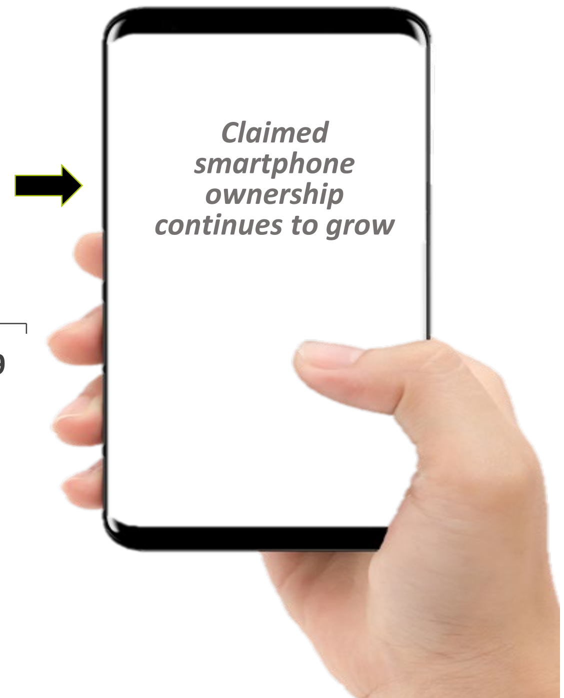


Lowest for 65+ (44%).

But showing rapid change.

(35% last year, 4% in 2012).

Equates to 3,064,000 users



Single 82%

Pre-family 100%

Family pre school 98%

Family pre teen 99%

Family teen 96%

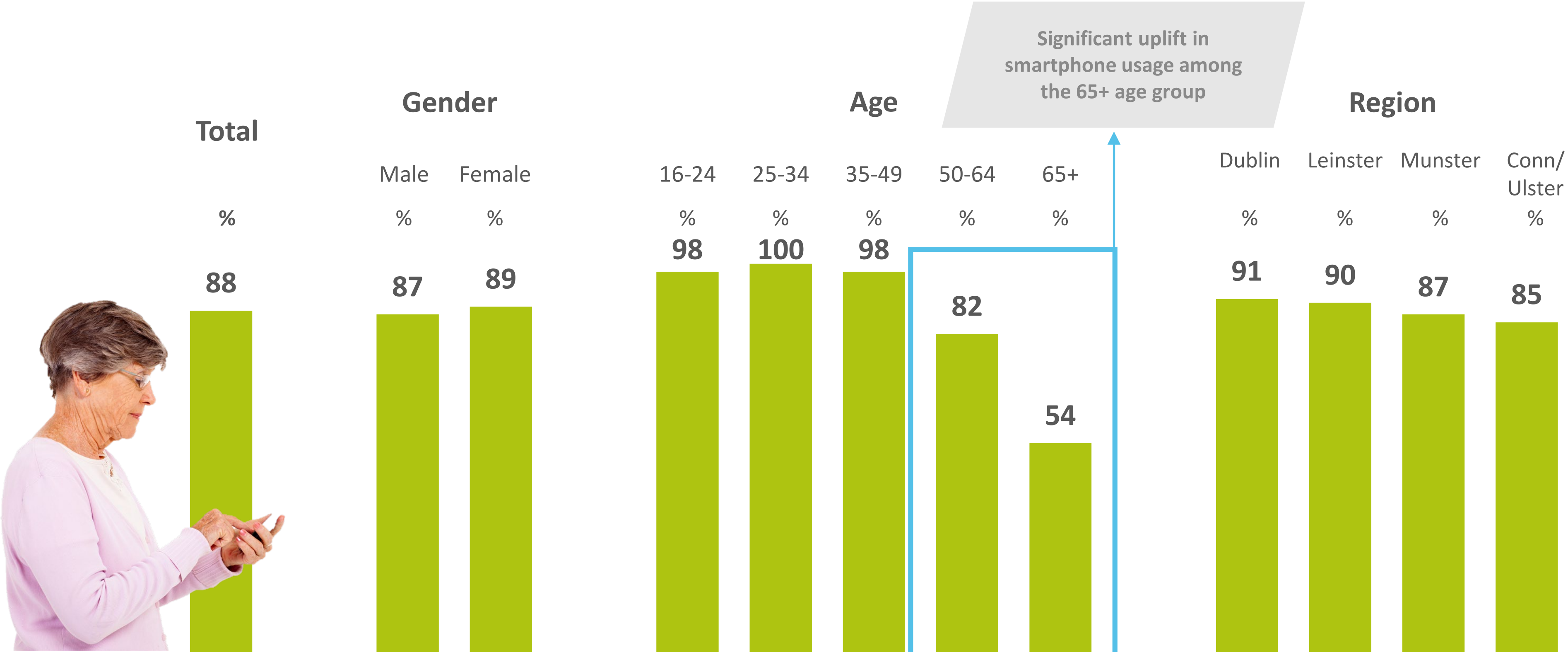
Empty nester 77%

Pre-January 2017 comparable data from eir Connected Living Survey 2015

Which of the following devices do you currently use?

Smartphone ownership among the over 65s is increasing rapidly

Base: All with mobile - 933



	Total	Male	Female	16-24	25-34	35-49	50-64	65+	Dublin	Leinster	Munster	Conn/ Ulster
% Feb '18	86	86	87	100	98	97	83	44	90	88	81	81
% Jan '17	79	79	79	95	92	91	66	32	89	75	78	72
% Aug '15	70	70	70	91	89	81	51	21	76	68	69	63
% Aug '14	64	66	64	85	84	74	43	18	75	66	57	57
% Aug '13	53	54	52	81	70	55	32	13	61	51	47	51

All under 50s with a mobile phone now have a smartphone, and smartphone ownership among the over 65s is increasing steadily.

Which of the following do you use nowadays?

Pre-January 2017 comparable data from eir Connected Living Survey 2015

We are now spending on average

10 hours a week

(up from 8 hours) per week on Facebook

All Facebook users: 652 base

Single	13 hours
Pre-family	10 hours
Family pre school	11 hours
Family pre teen	11 hours
Family teen	9 hours
Empty nester	5 hours

B&A

Average number of online social media posts per week

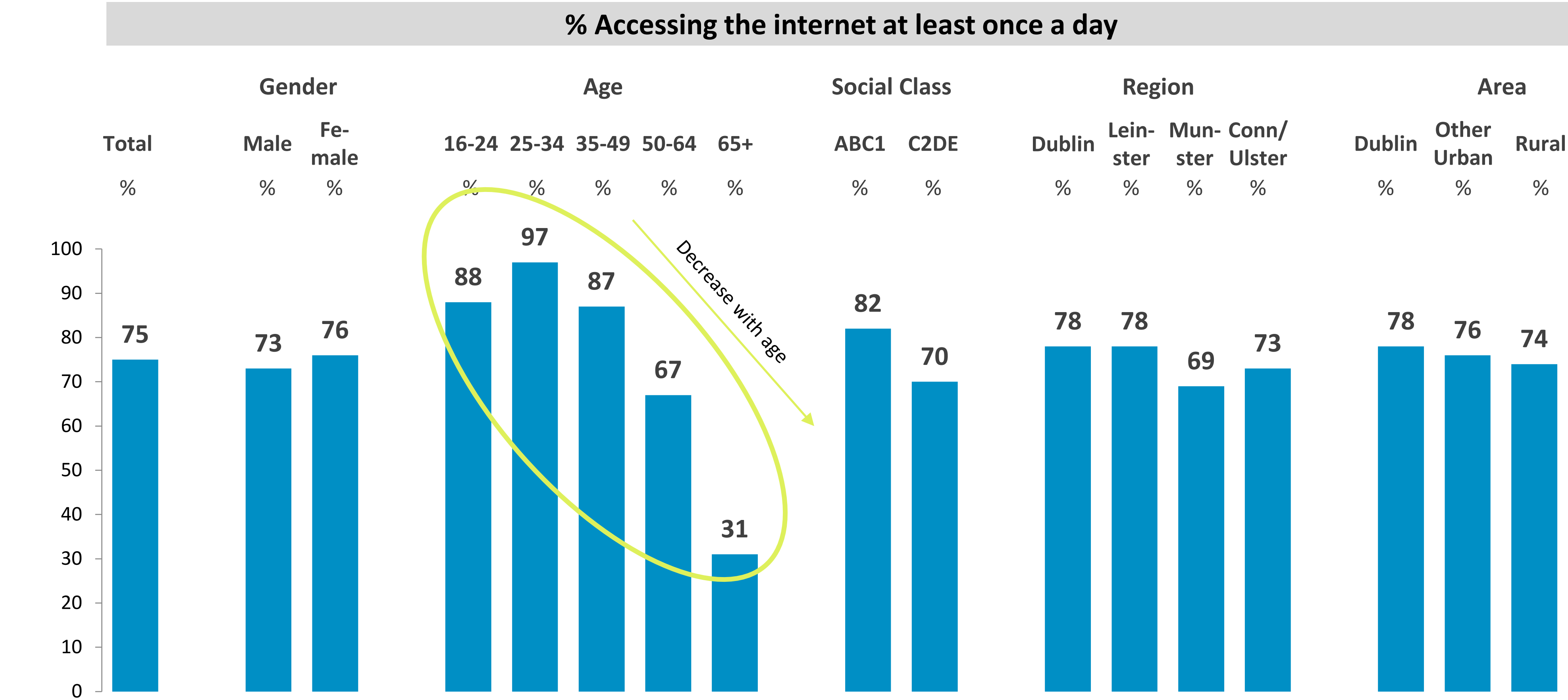
Base: All who post online n = 386

Q.9 *How many times a week would you post something online on a social media site or blog?*

Online behaviour

3 in 4 of us access the internet once a day or more often

Base: all Adults 16+ - 1,000



	Total	Male	Female	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	Dublin	Leinster	Munster	Conn/Ulster	Dublin	Other Urban	Rural
Feb '18	80	77	76	98	95	91	62	30	92	69	92	75	74	69	89	80	73
Jan '17	79	79	78	100	95	91	62	30	92	69	92	75	74	69	84		70
*Aug '15	75	76	74	96	93	86	54	33	84	67	81	78	75	66	82		65
*Aug '14	69	71	68	96	91	81	44	26	79	61	78	73	65	64	74		62

Pre-January 2017 comparable data from eir Connected Living Survey 2015

Note: 16% of the population still never access the internet. (52% amongst 65+ age cohort).

How often do you yourself access the internet nowadays?

Online services are we using nowadays…

Base: All adults 16+ - 1,000

24% (16%)
watch or stream live sports or other events online

41% (23%)
download/stream or watch a movies online

38% (26%)
Skype nowadays

42% (27%)
use catch-up TV services like RTE Player, TV3 Player, 4oD etc.

(43%) **53%**
of workers check work email at home

69% (61%)
Use personal email

57% (56%)
Online Bank

66% (55%)
Watch YouTube

64% (48%)
use instant messaging - WhatsApp, Messenger, Snapchat, Hangout, Viber etc.

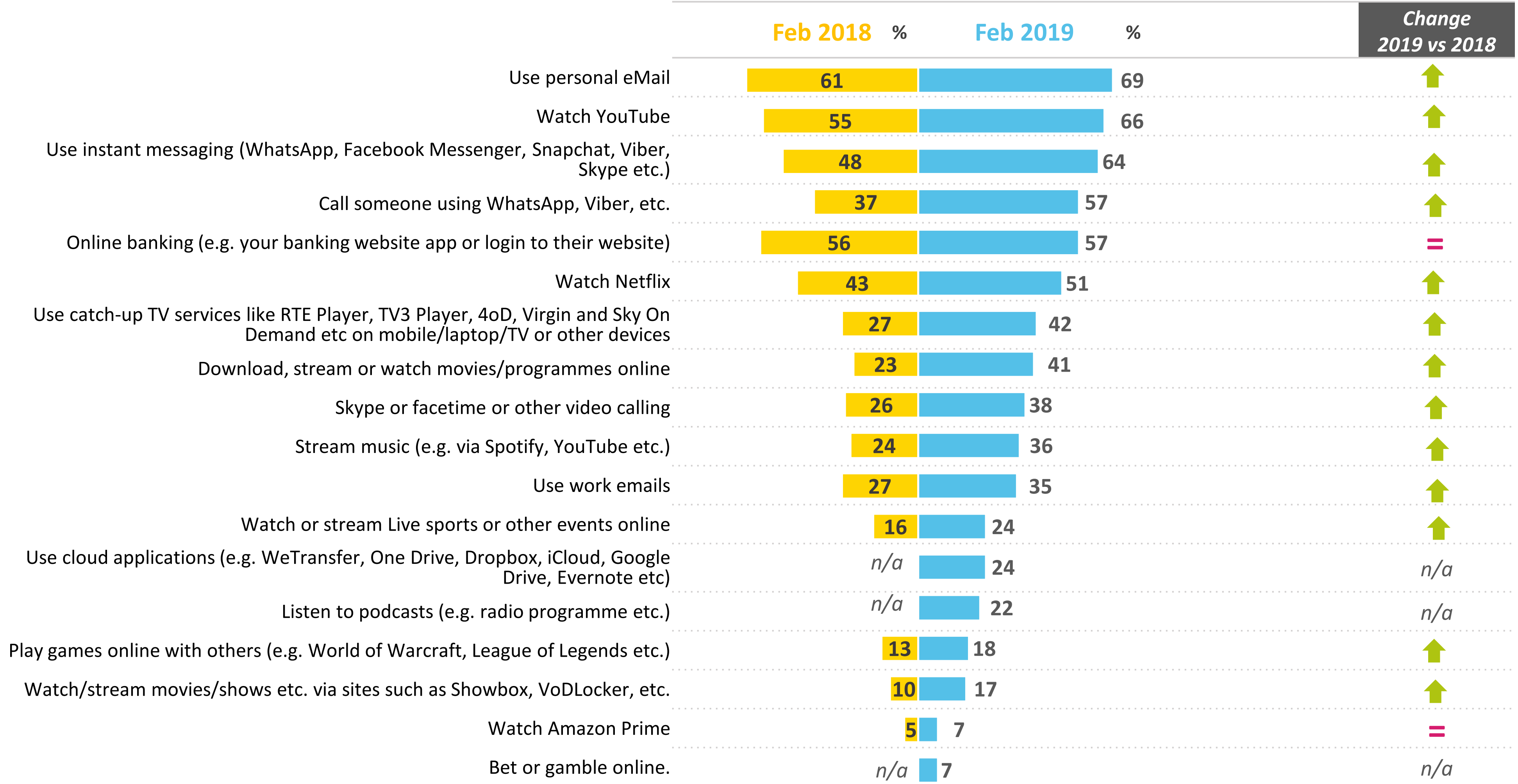
51% (43%)
watch Netflix

( ) = Feb 2018 data

Which of these do you do nowadays anywhere?

Online service usage (anywhere): 2018-2019

Base: All adults 16+ - 1,000



Usage of online services has increased across the board over the past year.

Which of these do you do nowadays anywhere?

Online services usage (anywhere) 2019 x demographics

Base: All adults 16+ - 1,000

Significantly lower
Significantly higher

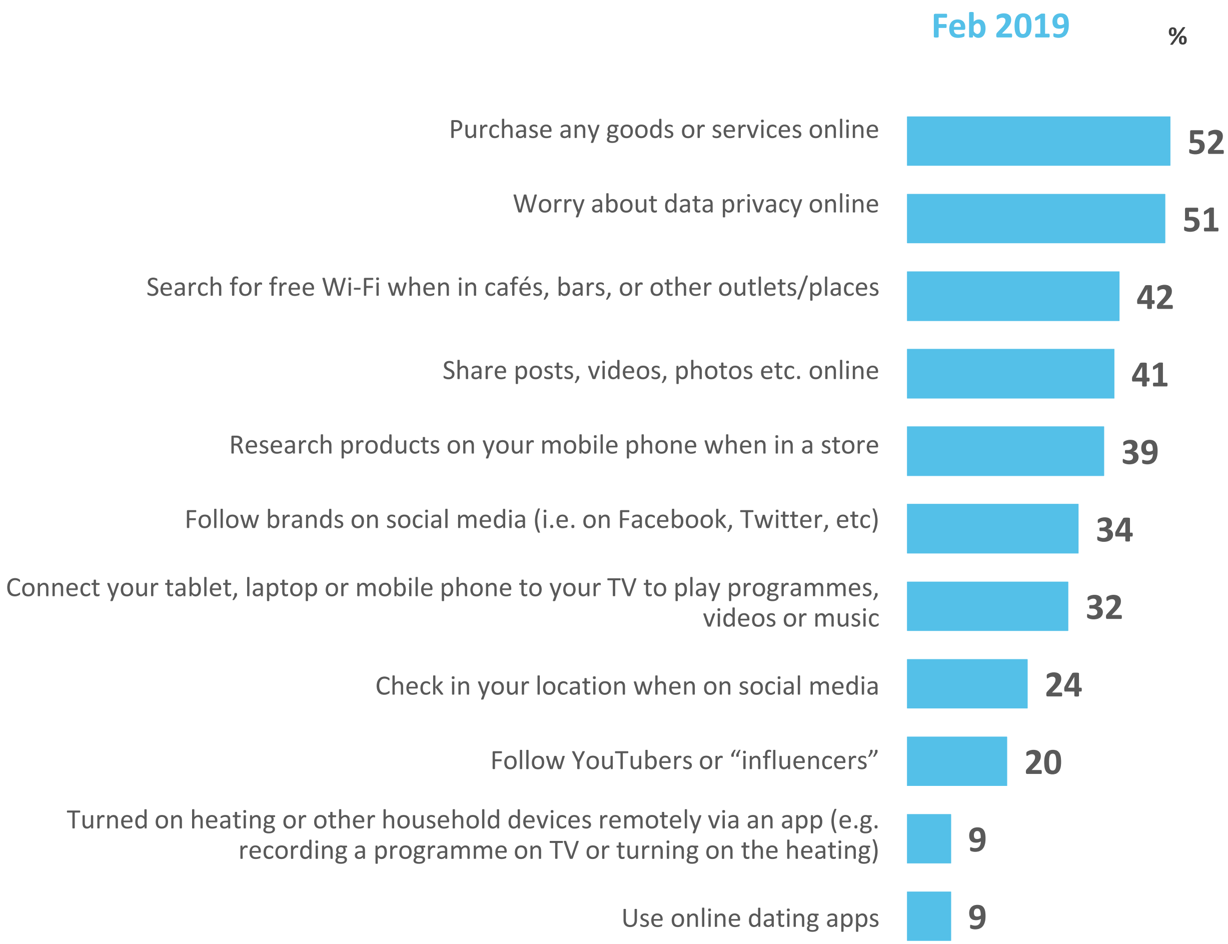
	Total	Age					Social Class	
		16-24	25-34	35-49	50-64	65+	ABC1	C2DEF
UNWTD	*1000*	*112*	*155*	*281*	*251*	*201*	*449*	*551*
	%	%	%	%	%	%	%	%
Use personal eMail	69	78	90	81	61	29	81	60
Watch YouTube	66	92	92	76	50	23	79	57
Use instant messaging (WhatsApp, Facebook Messenger, Snapchat, Viber, Skype etc.)	64	83	87	78	49	21	74	57
Online banking (e.g. your banking website app or login to their website)	57	55	85	71	47	17	70	47
Call someone using WhatsApp, Viber, etc.	57	76	74	67	45	21	64	51
Watch Netflix	51	81	73	58	35	11	62	42
Use catch-up TV services like RTE Player, TV3 Player, 4oD, Virgin and Sky On Demand etc on mobile/laptop/TV or other devices	42	54	58	46	36	14	51	35
Download, stream or watch movies/programmes online	41	65	64	47	27	7	48	36
Skype or facetime or other video calling	38	55	53	43	27	14	44	33
Stream music (eg via Spotify, Youtube etc.)	36	69	55	42	17	4	41	32
Use work emails	35	27	52	49	27	9	47	26
Watch or stream Live sports or other events online	24	40	38	24	17	5	31	19
Use cloud applications (e.g. WeTransfer, One Drive, Dropbox, iCloud, Google Drive, Evernote etc)	24	40	34	29	14	4	32	18
Listen to podcasts (e.g. radio programme etc.)	22	34	31	24	17	7	29	17
Play games online with others (e.g. World of Warcraft, League of Legends etc.)	18	44	26	17	9	3	25	13
Watch/stream movies/shows etc. via sites such as Showbox, VoDLocker, etc.	17	36	25	19	8	3	22	14
Watch Amazon Prime	7	18	13	7	3	1	8	7
Bet or gamble online.	7	10	12	8	3	1	10	5

Under 50s and middle class (ABC1s) use a wider variety of online services versus the over 50s and blue collar (C2DE).

Which of these do you do nowadays anywhere?

What else are we doing online nowadays?

Base: all Adults 16+ - 1,000



We are an engaged bunch.

Which, if any of the following do you do nowadays?

Online activity nowadays x demographics

Base: all Adults 16+ - 1,000

Significantly lower
Significantly higher

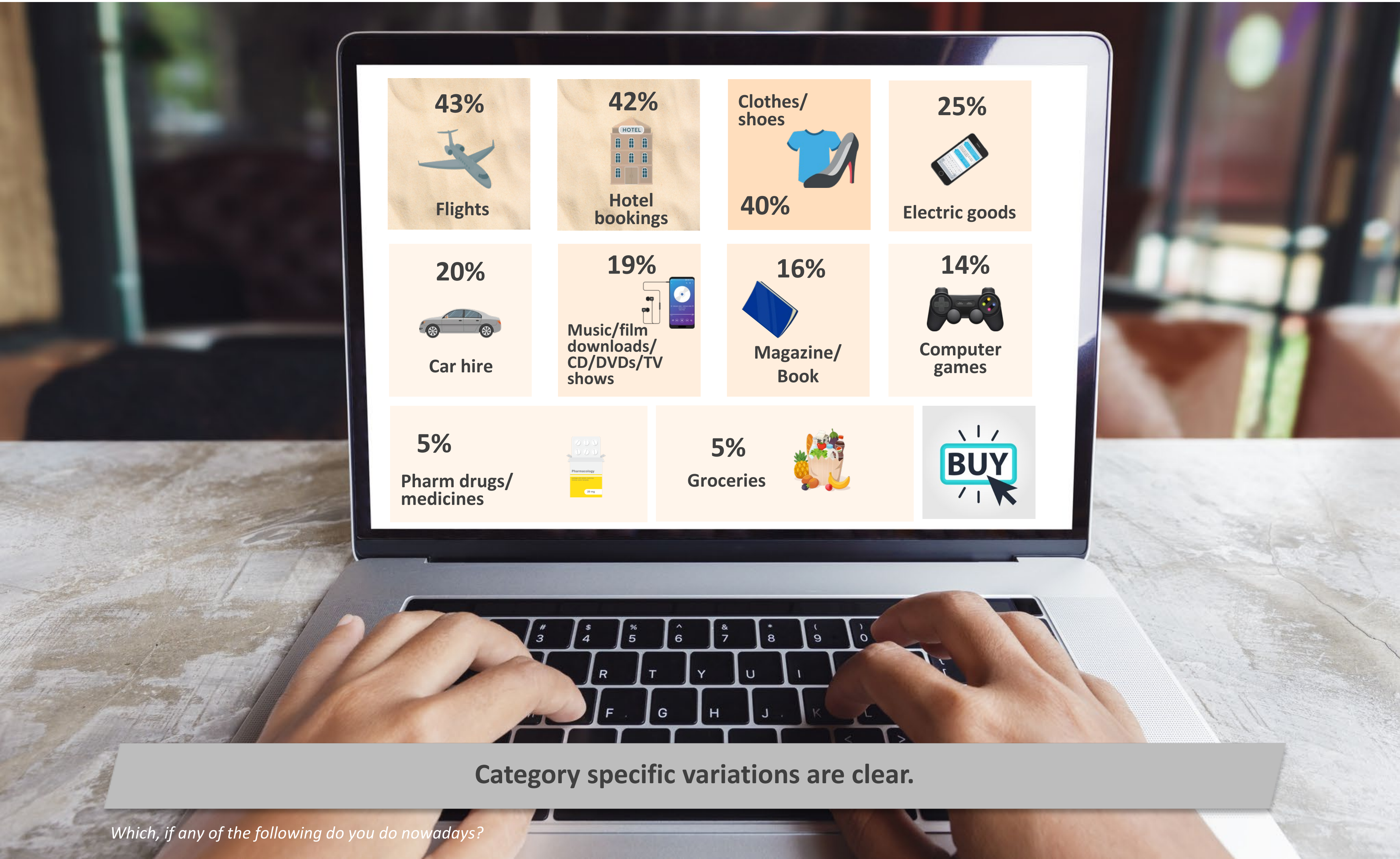
	Total	Age					Social Class	
		16-24	25-34	35-49	50-64	65+	ABC1	C2DEF
UNWTD	*1000*	*112*	*155*	*281*	*251*	*201*	*449*	*551*
	%	%	%	%	%	%	%	%
Purchase any goods or services online	52	67	76	66	38	12	67	42
Worry about data privacy online	51	49	55	71	46	20	60	44
Search for free Wi-Fi when in cafés, bars, or other outlets/places	42	73	64	48	26	7	51	36
Share posts, videos, photos etc. online	41	72	66	45	22	11	47	37
Research products on your mobile phone when in a store	39	64	59	48	21	7	47	34
Follow brands on social media (i.e. on Facebook, Twitter, etc)	34	63	57	37	14	5	38	30
Connect your tablet, laptop or mobile phone to your TV to play programmes, videos or music.	32	61	48	36	16	4	42	24
Check social media or emails when having difficulty sleeping	28	64	49	26	13	3	34	24
Follow youtubers or "influencers"	20	55	35	15	6	3	26	16
Turned on heating or other household devices remotely via an app (e.g. recording a programme on TV or turning on the heating).	9	15	8	13	5	3	13	6
Use online dating apps	9	25	16	5	4	1	10	8

The under 50s and ABC1s are most active online.

Which, if any of the following do you do nowadays?

What are we buying online..

Base: All adults 16+ - 1,000



Category specific variations are clear.

Which, if any of the following do you do nowadays?

What are we buying online.. x demographics

Base: all Adults 16+ - 1,000

Significantly lower
Significantly higher

	Total	Gender		Age					Social Class		Region					Area	
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1	C2DEF	Dublin	Out side Dublin	Lein-ster	Mun-ster	Conn/ Ulster	Urban	Rural
UNWTD	*1000*	*490*	*510*	*112*	*155*	*281*	*251*	*201*	*449*	*551*	*275*	*725*	*295*	*273*	*157*	*662*	*338*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Flights	43	42	44	46	63	58	33	10	57	33	38	45	47	42	48	42	47
Hotel Bookings	42	40	44	38	58	59	33	11	54	33	34	45	48	41	47	40	46
Clothes / shoes	40	35	44	51	61	53	22	7	50	32	39	40	44	37	37	39	41
Electric goods (including mobile phones)	25	27	23	36	44	30	14	3	30	22	23	26	29	21	29	23	30
Car Hire Bookings	20	22	18	16	25	30	17	5	28	14	21	20	26	17	15	20	20
Music/film downloads/CD/DVDs/TV shows	19	20	17	39	31	20	9	1	24	15	20	18	20	15	20	17	23
Books/Magazines	16	16	17	27	23	21	9	4	24	11	20	15	18	14	12	16	17
Computer Games	14	18	11	32	24	15	5	-	20	10	17	13	18	10	13	13	17
Groceries	5	5	5	6	6	9	2	0	7	4	10	3	3	2	3	6	4
Pharmaceutical drugs/medicines	5	5	6	11	7	7	1	1	8	3	10	3	4	3	3	7	3

Do you buy products or services online nowadays from any of the following categories?

Social media usage

Facebook and WhatsApp are the most popular social media and OTT services we use in 2019

Base: All Adults 16+ - 1,000

2018 %		Feb 19	Change vs 2018 %
67	** Facebook	68	+1
55	What's App	65	+10
31	** Instagram	35	+4
24	Viber/ Viber Messenger	30	+6
27	** Snapchat	29	+2
22	Spotify	26	+4
19	** Twitter	20	+1
15	** LinkedIn	18	+3
12	** Pinterest	12	=
6	Sound Cloud	9	+3
5	Tinder	5	=
n/a	Reddit	5	n/a
3	Tumblr	4	+1
n/a	Plenty Of Fish	2	n/a
n/a	Bumble	1	n/a

****Any Social Media usage nowadays =**

73%

(75% in 2018)

WhatsApp usage has increased most significantly over the past year

Pre-January 2017 comparable data from eir Connected Living Survey 2015
Reddit, Plenty of Fish and Bumble added in 2018
*** = Social media*

Q.5 Which of the following, if any, do you ever use nowadays?

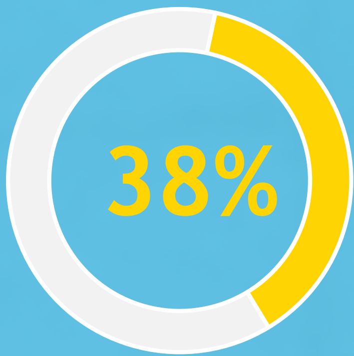
Facebook, Instagram, WhatsApp and Snapchat most used social networks and OTT services among 16-24 year olds

Base: All 16-24s -112

2018 %	Feb 19	%	Change vs 2018 %
95	Facebook **	94	-1
70	WhatsApp	83	+13
75	Instagram **	78	+3
68	Snapchat **	73	+5
46	Spotify	61	+15
35	Viber/ Viber Messenger	48	+13
39	Twitter **	40	+1
23	Pinterest **	30	+7
13	Sound Cloud	30	+17
20	LinkedIn **	27	+7
17	Tinder +	20	+3
n/a	Reddit	13	n/a
7	Tumblr	12	+5
n/a	Bumble +	5	n/a
n/a	Plenty Of Fish +	3	n/a

*** = social media*

Which of the following, if any, of these do you ever use nowadays?



of all adults prefer to use WhatsApp or messenger than call people

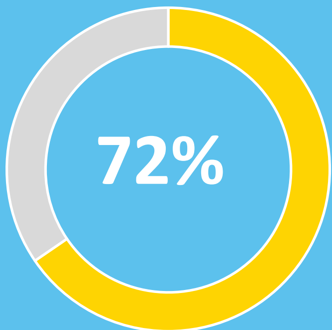
16-24 year olds	53%
25-34 year olds	48%
35-49 year olds	42%
50-64 year olds	28%
65+ year olds	22%

B&A

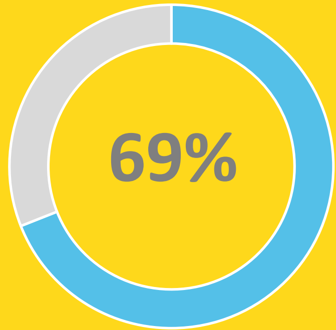

B&A
23%
of 16-24s are on at least one dating site

Social media and data privacy

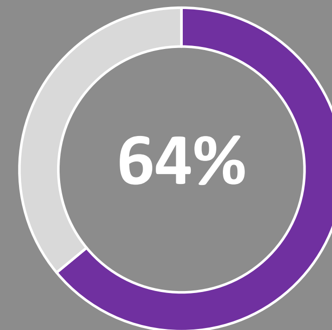
Base: Any social media users



Are more careful nowadays regarding who they friend on social media



Are concerned about the privacy of their data on social media such as Facebook and Twitter



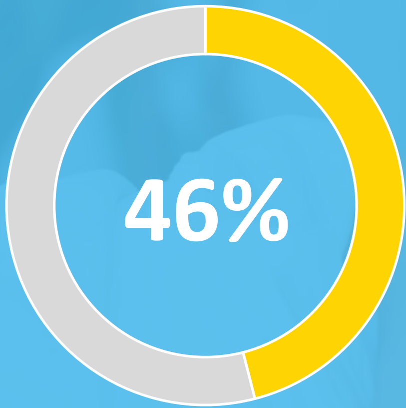
Watch what they post on social media nowadays due to data privacy concerns

Always on and coping

Base: Any respondents – 1,000

%	Any agreement	Age 16-24	Age 25-34	Age 35-49	Age 50-64	Age 65+
		112	*155*	*281*	*251*	*201*
		%	%	%	%	%
One of the last things I do at night is check my social media such as Facebook, snapchat etc.	33	58	43	34	21	15
One of the first things I do in the morning is check my social media such as Facebook, snapchat etc.	32	59	42	32	21	14
One of the first things I do in the morning is check my email	29	37	32	34	23	17
One of the last things I do at night is check my email	28	31	32	35	24	16
I find it hard to switch off from thinking about work/school/college in my spare time in the evening/weekends	23	20	30	23	20	16
I often check my work emails on holidays because I feel that is what is expected nowadays (all working)	22	29	21	26	24	13

To what extent do you agree or disagree ...



check emails, text messages, or social media last thing at night or first thing in the morning

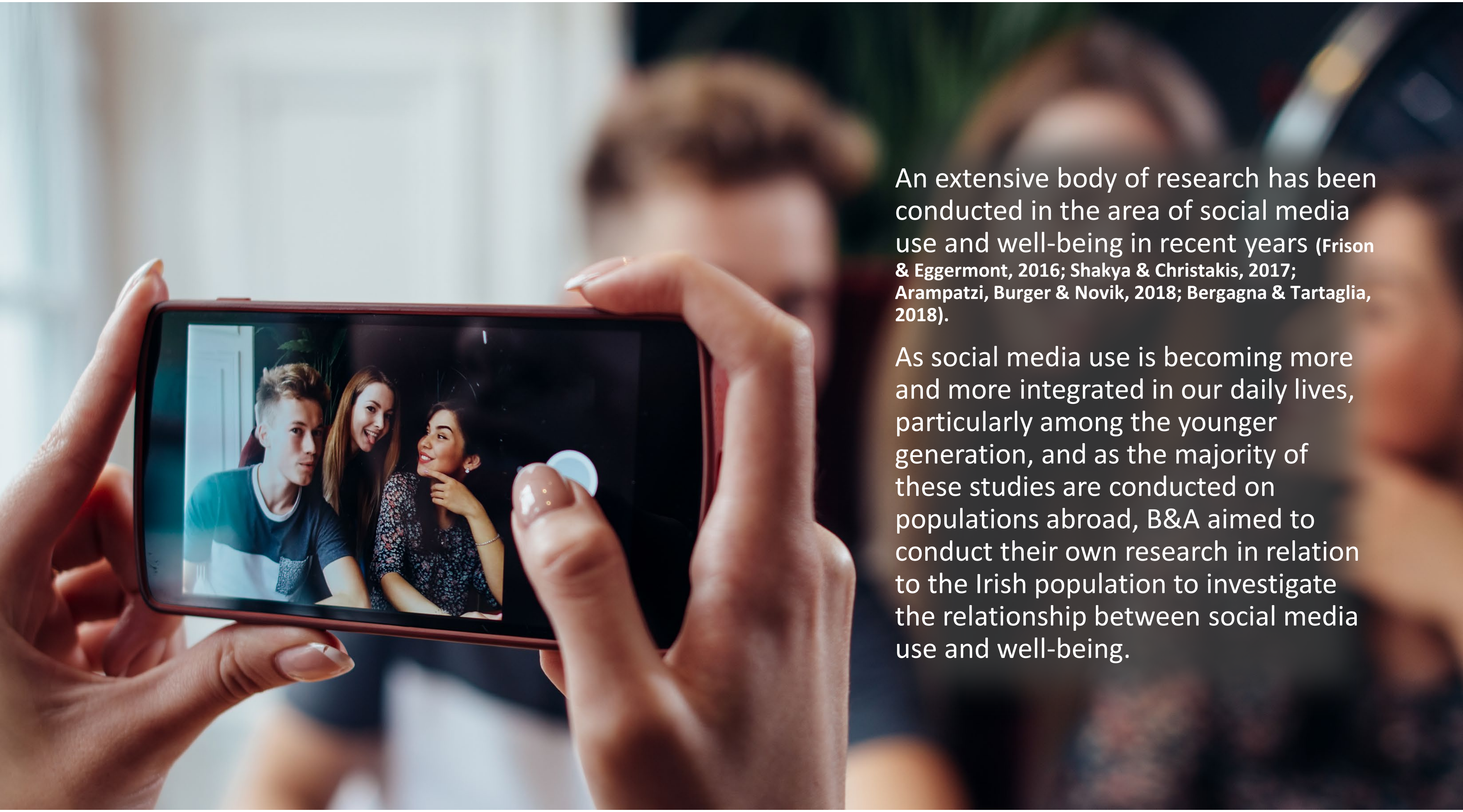
Down from 60% in 2017
(Some are trying to cope)

Base: All Adults 16+ who use SM (720)

Single		53%
Pre-family		52%
Family pre school		57%
Family pre teen		49%
Family teen		48%
Empty nester		29%

Self esteem & social media analysis

Social media use and well-being
Previous literature



An extensive body of research has been conducted in the area of social media use and well-being in recent years **(Frison & Eggermont, 2016; Shakya & Christakis, 2017; Arampatzi, Burger & Novik, 2018; Bergagna & Tartaglia, 2018).**

As social media use is becoming more and more integrated in our daily lives, particularly among the younger generation, and as the majority of these studies are conducted on populations abroad, B&A aimed to conduct their own research in relation to the Irish population to investigate the relationship between social media use and well-being.

Measures

- Facebook use was measured in hours per week. Respondents were asked: ***"And how many hours per week (including weekends) would you spend on Facebook, whether at home or at work?"***
- Rosenberg's (1965) Self-Esteem Scale was used to assess participants' self-esteem. This measure included 10 items on a 5-point Likert scale ranging from 1 (strongly disagree) to 5 (strongly agree). Sample items included: ***"I am able to do things as well as most other people"*** and ***"I feel that I'm a person of worth, at least on equal plane with others"***. Five of the items were reverse scored and items were summed.
- A single item happiness measure taken from the European Social Survey (2016) was used to assess participants' happiness ratings. Participants were first asked the question: ***"Taking all things together, how happy would you say you are?"*** They were then asked to rate their happiness levels on an 11-point scale ranging from 0 (extremely unhappy) to 10 (extremely happy).
- In addition, **a range of other attitude statements around social media** were included.

Self esteem analysis

Base: Any respondents – 1,000

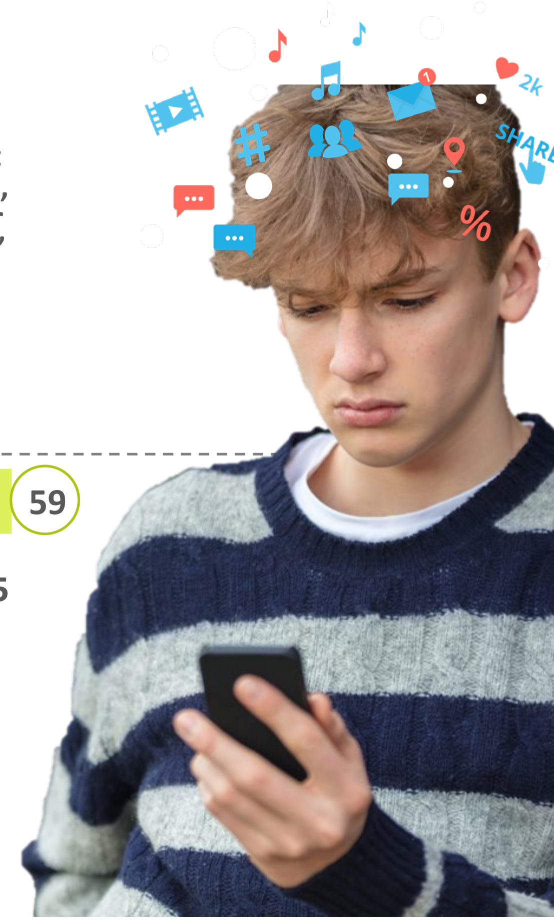
Rosenberg's (1965) self esteem scale was used to access respondents' self esteem. This measure included 10 attributes being measured on a 5 point scale ranging from 1 (strongly disagree) to 5 (strongly agree).

To what extent do you agree or disagree with each of the followings.

The results make for stark reading, especially for 16-24 year olds who use social media

Base: All on social media - 761

%	I tend to compare my life to others' lives on social media	Scrolling through social media affects my confidence in a negative way	I have used social media to 'spy' on the activity of others	I have been 'economical' with the truth on social media sites	I follow a lot of celebrities, youtubers or "influencers" on social media
TOTAL	20	14	27	33	27
16-24	37	23	50	50	59
25-34	24	12	29	36	35
35-49	19	15	24	28	19
50-64	7	8	12	29	8
65+	12	9	21	23	9



Q.13 To what extent do you agree or disagree ...

What is more disturbing is the level of agreement increases the lower a person’s self esteem (and to a degree, their happiness)

Base: All on social media - 761

	I tend to compare my life to others’ lives on social media	Scrolling through social media affects my confidence in a negative way	I have used social media to ‘spy’ on the activity of others	I have been ‘economical’ with the truth on social media sites	I follow a lot of celebrities, youtubers or “influencers” on social media
SELF ESTEEM	%	%	%	%	%
TOTAL	20	14	27	33	27
High	8	5	19	35	24
Normal	24	16	29	32	27
Low	57	39	51	39	48
HAPPINESS SPECTRUM					
High	15	10	21	34	29
Normal	20	13	30	32	26
Low	33	27	29	37	27

Q.13 To what extent do you agree or disagree ...

And if we look emotionally at where those with lower self-esteem or happiness over-index, it allows us to build some psychological profiles of these individuals

Base: All adults 16+ – 1,000

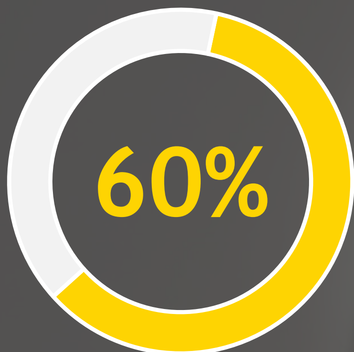
	Total	Self esteem spectrum			Happiness		
		Low	Normal	High	ANY 0-5	ANY 6-8	ANY 9-10
UNWTD	*1000*	*42*	*655*	*303*	*115*	*617*	*268*
	%	*%*	*%*	*%*	*%*	*%*	*%*
I feel that I have a number of good qualities	96	81	96	100	86	97	99
On the whole, I am satisfied with myself	94	60	94	99	78	96	99
I take a positive attitude toward myself	93	56	93	100	73	95	98
I feel that I am a person of worth, at least on an equal plane with others	93	69	93	98	77	95	97
I am able to do things as well as most other people	89	56	87	98	77	88	95
I wish I could have more respect for myself	28	93	34	5	60	27	17
I feel I do not have much to be proud of	26	95	30	7	54	24	16
I certainly feel useless at times	22	85	26	3	48	21	12
At times I think I am no good at all	19	92	22	1	48	17	10
All in all, I am inclined to feel that I am a failure	14	76	16	1	34	13	8

Those less happy with their lives are 3.5 times more likely to state they wish they could have more respect for themselves, or feel they area a failure, or do not have much to be proud of.

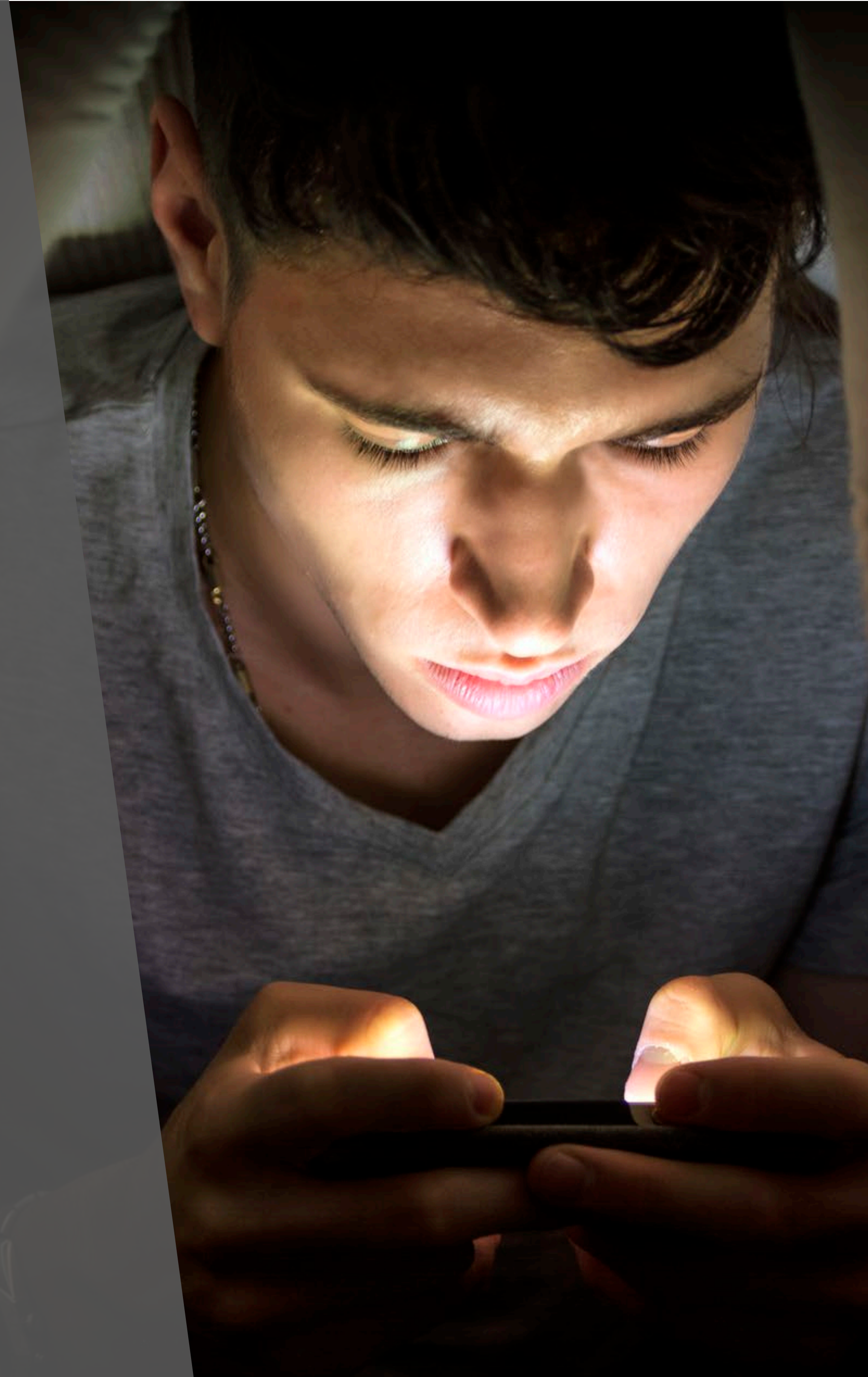
Q.13 To what extent do you agree or disagree ...

It is clear more work needs to be done on the impact of technology. We don't claim to have the answer, rather B&A is building its knowledge

We’re always on



People have lost the art of conversation



16-24 year olds 47%

25-34 year olds 54%

35-49 year olds 62%

50-64 year olds 69%

65+ year olds 60%

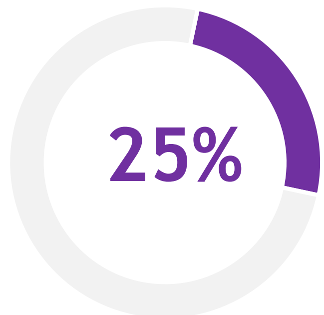
B&A

Almost 2 in 5 of the 25-35 cohort are checking work emails on holiday, with half checking SMS/emails when they can’t sleep

Base: all Adults 16+ - 1,000

Check social media or emails when having difficulty sleeping

AGE	%
16-24	**64**
25-34	**49**
35-49	26
50-64	13
65+	3



Check work emails when on holidays

AGE	%
16-24	29
25-34	**38**
35-49	**32**
50-64	19
65+	7

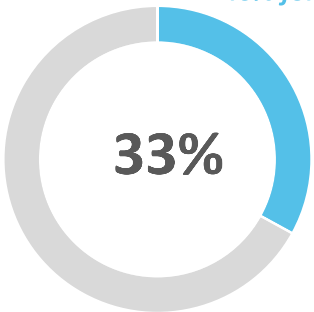
Which, if any of the following do you do nowadays?

“

I try to stay away from screens during the day at weekdays. That includes TV, mobile, tablet and PlayStation. This is because I find these devices can ruin your attention span and you won't get anything done if you are on them during the day.

Many are feeling negative impacts

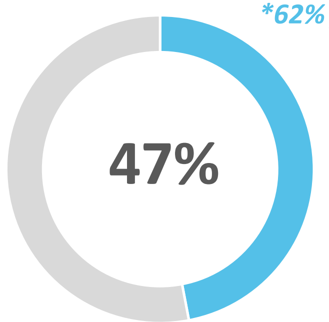
*40% for U25s



Social media is a source of anxiety and stress

Base: All Adults 16+ (1,000)

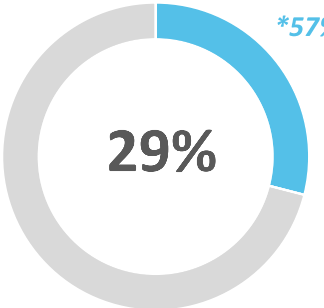
*62% for U25s



Tried to reduce online social media activity

Base: All Adults 18+ (1,000)

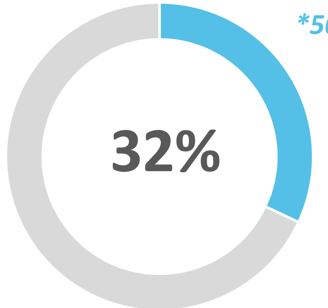
*57% for U25s



Feel pressure to have opinion/take a side on topical issues

Base: All Adults 18+ (1,000)

*50% for U25s



Can't imagine life without social media

Base: All Adults 16+ who use SM (720)

Significant numbers are beginning to make changes, particularly under 25s.

Technology that heals?

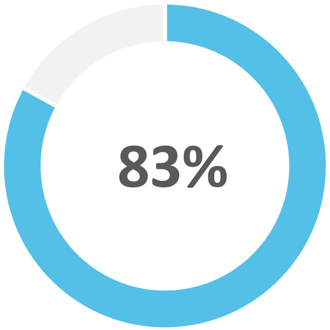
- Technology has delivered tangible benefits at a profound level, stitched into the fabric of society
  - ❖ Far flung families connect despite 1,000s of miles and shifted time zones in between.
  - ❖ Communities form around meaningful shared perspectives
    - New mums,
    - Local volunteers,
    - Sports coaches,
    - …connect and support each other with ease.
- But there is much more talk about the negative effects this year..

Culture

Guilt and lip service

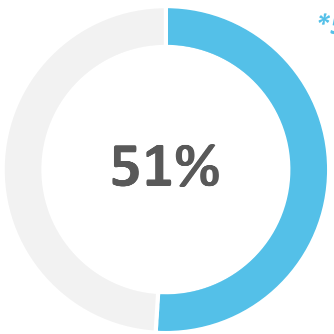
- There is a growing awareness of the need to be sustainable:
    - ❖ Despair about plastic on the ocean/in stomachs of whales
    - ❖ Relabelling bottles, ‘single use plastic’.
- But behaviour change is at a modest (mainly middle class) level as yet:
    - ❖ Loose fruit over pre-packed
    - ❖ Reusable coffee cups (if I remember to bring it).
    - ❖ Paper straws over plastic (with a Friday night cocktail).
- Sustainability is more often a source guilt
    - ❖ A sense that we are not doing enough
    - ❖ That bigger issues (global warming, global pollution) are beyond our agency to change.

Emerging change or lip service?



Sustainability is a global issue that needs to be addressed

**56% middle class*



Choose products based on whether they are sustainable

Positive indication of shift in behaviour as well as underlying attitude change.

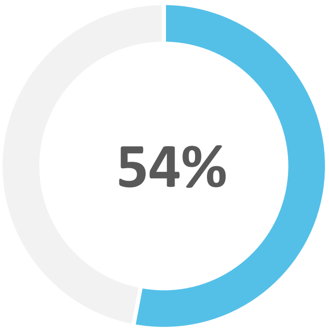
Base: All Adults 18+ (1,000)

Balance seekers

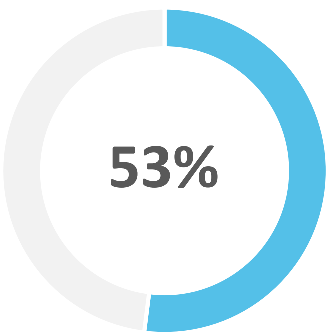
- In a time pressed world there can be a strong desire to achieve **balance**:
  - ❖ Reclaiming peace of mind.
  - ❖ Finding 'me time'.
  - ❖ Valuing downtime/playtime.
- There is often a link made between physical activity and mental health.
- Many feel they must **assert** their **right to rebalance**
  - ❖ Under pressure from unwritten rules about being **'always available', 'responding rapidly'.**

Which Ireland do you see?

'New Ireland' gets a lot of media attention….



Pride in same sex marriage result



Neutral or disagree we are losing Irish identity in face of foreign national influx

There is a 'progressive' outlook on important social issues with significant part of our society.

Base: All Adults +16 (1,000)

Which Ireland do you see?

Nearly half of us are uncertain about recent changes.

Base: All Adults +16 (1,000)

Which Ireland do you see?

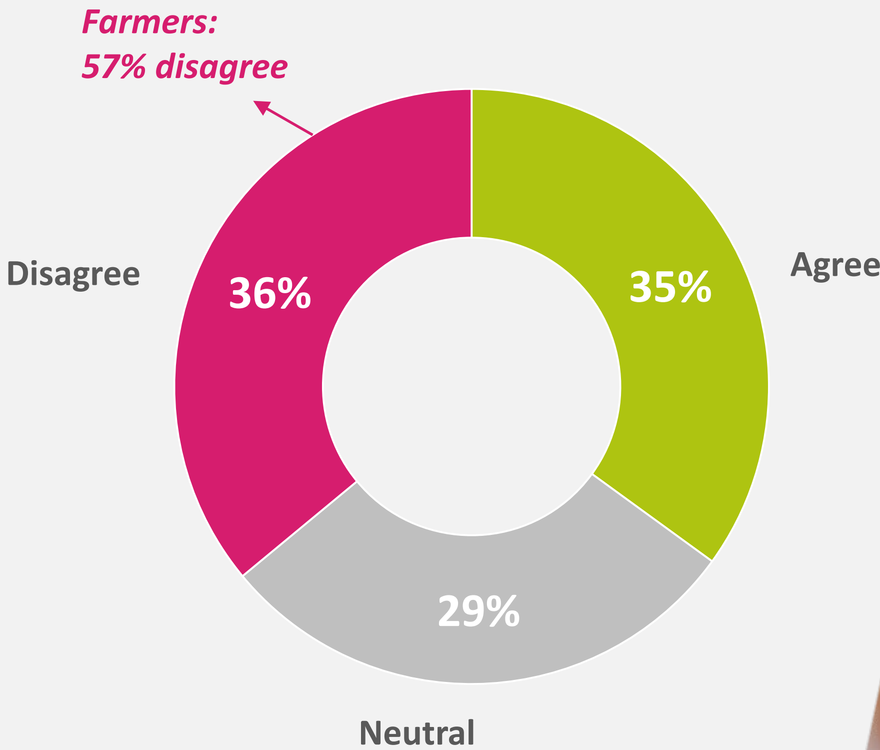
B&A

A significant proportion are feeling the pressure of modern life.

Base: All Adults +16 (1,000)

Which Ireland do you see?

Religion does more harm than good



We have deeply divided views on religion

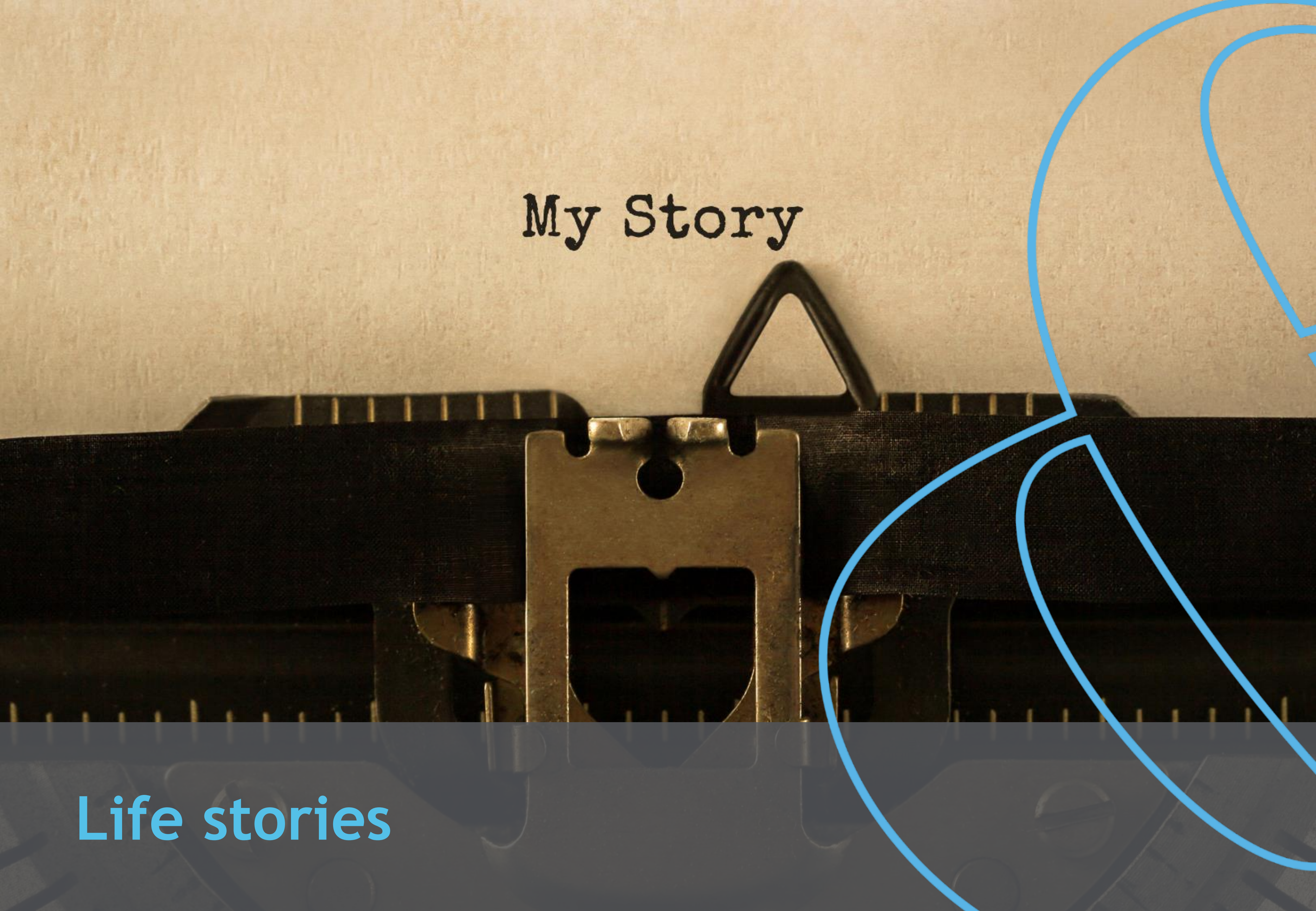
Base: All Adults +16 (1,000)

Which Ireland do you see?

Base: All Adults +16 (1,000)

I left the house at the crack of dawn this morning and said sort out the clothes and do the delph before you go. He is not stuck for time but I'm stuck for time because I have to do collection and drop offs for Irish dancing…. are the clothes done? no, is the dishwasher emptied and refilled? no.

Mommy will end up doing that now before I head off to Dublin because I feel like it has to be done. The joys.

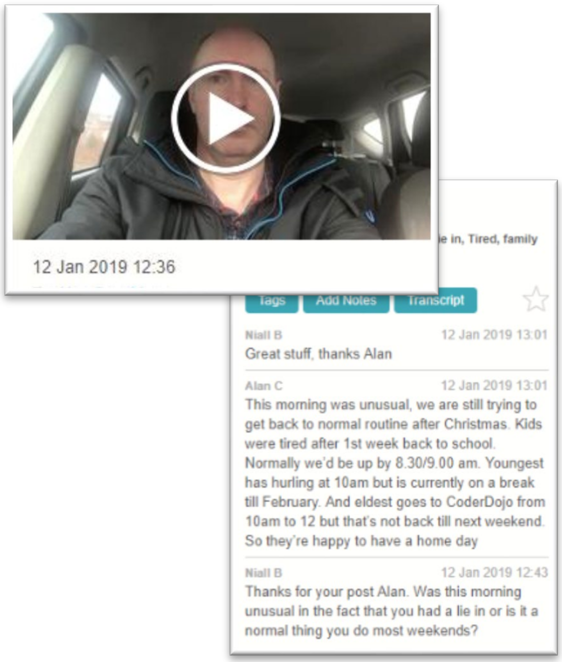


Life stories

Our online ethnographic approach

B&A

1 Video, text and dialogue

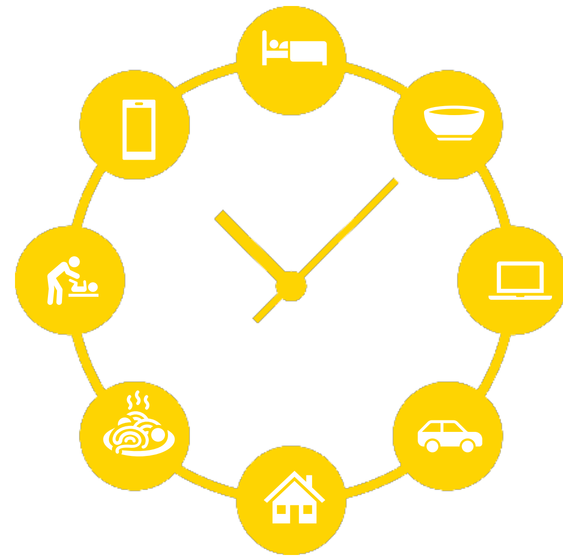


Participants upload multiple times per day based on scheduled reminders and prompted real time dialogue from moderator.

2 Analysis

Tagging and analysis of key moments, needs, emotions, behaviours and contexts.

3 Output



Distilled insights, and themes which reflect a true reflection of participants lives. Brought to life with rich media elements.

Life stories

Our life story has common chapters

How we explain our life to each other has common themes

Crossroads

- Making trade offs
  - Career choices.
  - Relationship choices.

Caring for

- Children.
- Parents.

Rooting

- Independence.
- Ownership.
- Settling down.

Embarking

- New direction.
- Facing challenges.
- Transitions in life.

Exploring

- Learning.
- Travelling.
- Socialising.
- Following personal interests.

No Kids - Their story

Crossroads

They are at a stage with the need to trade off priorities; about career choices, relationships and life choices. They are asking themselves questions such as *"should I travel or should I save for a mortgage."* Fears about the future in terms of the attainment of personal goals and social norms.

Embarking

They are embarking on new careers and new directions in their lives. Nearly everything they are doing is *"a first".*
They are in the process of transitioning from partial to full independence, although many cross the line and back a few times.

Exploring

They are at a stage where exploration is required, experimenting with new ideas and seeing new things.

Young Family - Their story

Caring for

They are personally investing in the development of their children. Strong sense of identity and satisfaction from this. Big changes to personal freedom and grandparents are often the saviours for looking after the kids.

Rooting

They are trying to put down roots for stability and security -*"After many years of fun and boozing it was time to grow up"*. Buying first homes and making sacrifices.

Embarking

They are moving in a new direction and facing the new challenges of parenthood.

Middle Family - Their story

Crossroads

As the family grows, trade-offs in terms of working arrangements need to be made due to the increased demands of housework and family life. Many considering returning to work after time out either to increase financial power of the home and/or for their own *"sanity"*. There is a feeling of a lack of adventure and excitement due the highly structured daily timetable.

Caring for

Children have grown up and started school etc., so there is an increase in the level of freedom that parents have. However, there is often now a need to keep an eye out for aging parents.

Rooting

Integration socially into the area for themselves and their children. Potentially need to think about moving to a bigger, more long term residence.

Mature Family - Their story

Caring for

Although their children have grown up, they still need support either from a living or financial perspective. In addition, the health of their parents is becoming a more pressing issue.

Embarking

Transitioning out of their the more attentive parental role as their life takes a new direction. Potential breakdowns in relationships and development of new ones.

Exploring

Begin to reclaim their independence and follow some of their own interests again. Beginning to try new activities. Doing things that *"they always wanted to do".*

B&A | Sign of the Times

Household financial situation

49% Getting by

37% Living comfortably

14% Struggling

Brexit concern

64% Worry about the impact of Brexit on Irish economy

58% Worry about the impact of Brexit on personal situation

Not all benefit from economy

44%

32%

Shifted milestones

61% Have a better life than their parents

yet

40% Will not have the same stuff at the same stage as their parents

Resistance to change?

69% ***Too politically correct***
Agree that society has become too politically correct

47% ***Identity***
Agree Ireland is losing its sense of identity with influx of foreign nationals

#metoo

42% ***Me Too***
Feel ***Me Too*** has gone too far
45% for men

Are we moving too fast?

61% Feel everything is changing too quickly

53% Find pace hectic

33% SM is a source of stress/anxiety in life. ***40% U25s***

29% Tired all the time

Sign of the Times

Topline Overview

- **Economically** things seem buoyant but this disguises substantial differences by age group, by part of country (Dublin/urban versus rest), and by social class:
    - ❖ Many in the early family life stage are struggling to keep up and some are shifting spend to treat selves rather than to be prudent.
    - ❖ Confidence and optimism are both constrained.
- **Technology** is becoming all pervasive and fundamentally recalibrating how we interface, what we spend our time on and how we purchase. Some are moderating use:
    - ❖ Social media sows seeds of self doubt and insecurity: with parents and kids.
    - ❖ Also propagates fake news.
    - ❖ Subverts traditional media.

Sign of the Times
Topline Overview

- The country is struggling to reconcile issues to do with **immigration**, **gender equality**, **sexual orientation**: despite manifest, tangible progress there is a lot of difference and unease:
  - Potential for unrest and disharmony as clear here as in other countries, but as yet without a catalyst.
- Wide differences in attitudes and priorities by **life stage** and the study particularly focuses on shifts for young, middle and mature families:
  - Potential implications for how, when and in what way we talk about health insurance.
- Our **shopping** illustrates a desire for quality and premium experience through a veneer of value:
  - ‘Better’ is more important than ‘cheaper.’

Sign of the Times
Topline Overview

- Our health perceptions confound objective assessment:
  - ❖ Younger adults feel bulletproof and focus on the body beautiful. Mental health an escalating issue.
  - ❖ Family lifestage obsess over kids but concerns about weight, diet and alcohol start to intrude.
  - ❖ Only in "old age" do we see a more pragmatic and realistic assessment.
- There is a hunger for self-treatment and mental and physical recalibration:
  - ❖ Employers and insurers can be the conduit of advice and guidance to live better.
  - ❖ Work-based schemes are highly beneficial.

Thank you.

B&A RESEARCH & INSIGHT

Milltown House
Mount Saint Annes
Milltown, Dublin 6 - D06 Y822
+353 1 205 7500 | www.banda.ie

Delve Deeper