RESEARCH
& INSIGHT

Sign of the Times 2022

Full report

Prepared by
Niall Brennan, Maggie Matthews
Luke Reaper, Katie Kirkwood

@banda_ie
behaviour&attitudes
behaviour&attitudes

info@banda.ie
Tel: 01 205 7500
www.banda.ie

J.223383

This year's themes

Who are we?

Not everything has changed since 1991/95

Lifestyles versus 1991/95

The age of hyper uncertainty

Making up for lost time

Societal stagnation & polarisation

Self discovery and direction

The online 'boom'!

Framing sustainability

Adjusting to a new future reality

Methodology

Online consumer groups

- **4 online groups**
- ABC1, 24-55, Dublin and Cork

Shopalongs

- 4 X 1 hour f2f shopalongs
- 3 X 1 hour online shopalongs

National online survey

- **Nationally representative** (n=,1000)
- Fieldwork Feb/March 2022

Series of national face-to-face omnibus surveys

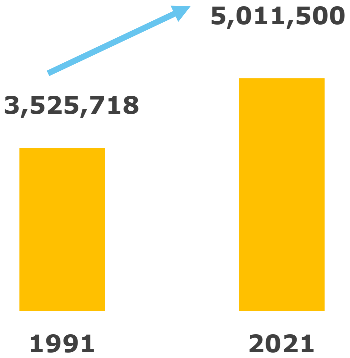
- To up date our 1991/1995 Shifty Lot reports (i.e. trended data over 30 years).
- Sept 2021 – Apr 2022 fieldwork *(Denoted* ****F2F*** *on charts)*


Who are we?
Census Review of where we are
demographically as a nation

Demographic Shifts from 1991 to 2021

*COVID-19 adjusted unemployment rate

Dramatic population growth & an aging society



This increase has been boosted by **645,500 non-Irish** nationals (12.9% of total pop) and a **large growth in those over 65** which has reached **742,300** (14.8% of total pop.) In 1991, there was a total of 402,880 people over 65 showing a major shift in this cohort. By 2031 the projection is for the 65+ cohort to account for 1 million.

Alongside this, the mortality rate has been increasing and is projected to continue on this path with life expectancy set to increase by 2.5% for males and 2% for females in the short term, and 1.5% in the long term.

Better economic situation

Both periods experiencing major economic turbulence.

- **1991** – recession in the late 1980s
- **2021** – pandemic-induced recession and recovery

1991 saw a **19%** unemployment rate, while **2021** experienced a **12.4%** unemployment rate when you account for the **COVID-19 adjusted measure of unemployment**.

When considering both economic situations, it is important to acknowledge that the **2021** experience has **improved significantly** in a very short time. For example, in the space of one year (**August 2020 to August 2021**) the unemployment rate dropped from **17.1% to 12.4%**).

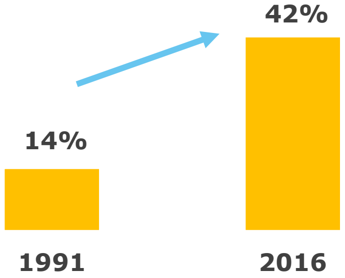
Therefore, economic outlook of respondents may well be more positive than that of 1991 respondents given the quick dip and rapid recovery nature of this recession.

As of February 2022, the unemployment rate stands at 7%*.

Higher educational attainment

Seismic shift has been seen in the area of education with a particularly significant jump in those who have gained a **third level education** between 1991 and 2016 (last census).

In **1991**, the number stood at **13.6%**; in **2016** this jumped to **42%**.



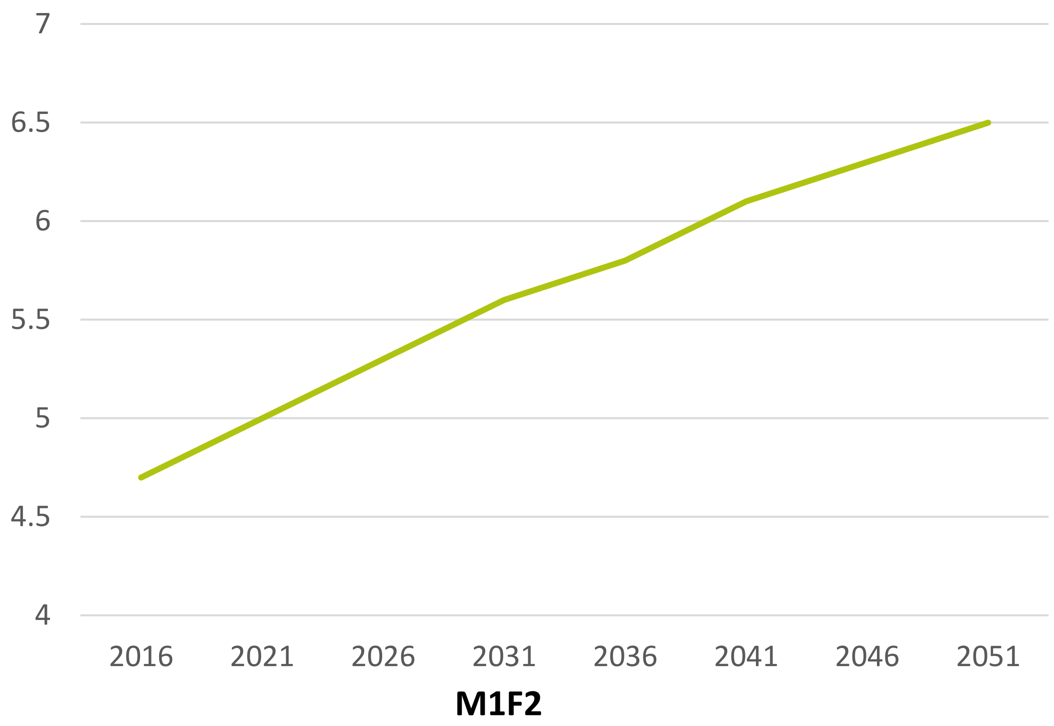
Unsurprisingly this increase in third level attainment has been paired with a massive drop in those who have **no formal education**; moving from **34.4% in 1991** to **13.3% in 2016**.

This has a **lasting impact on our views** and thus this research, given that those who achieve a third level education are more likely to be more liberal in their opinions and behaviours.

Population growth projected to continue

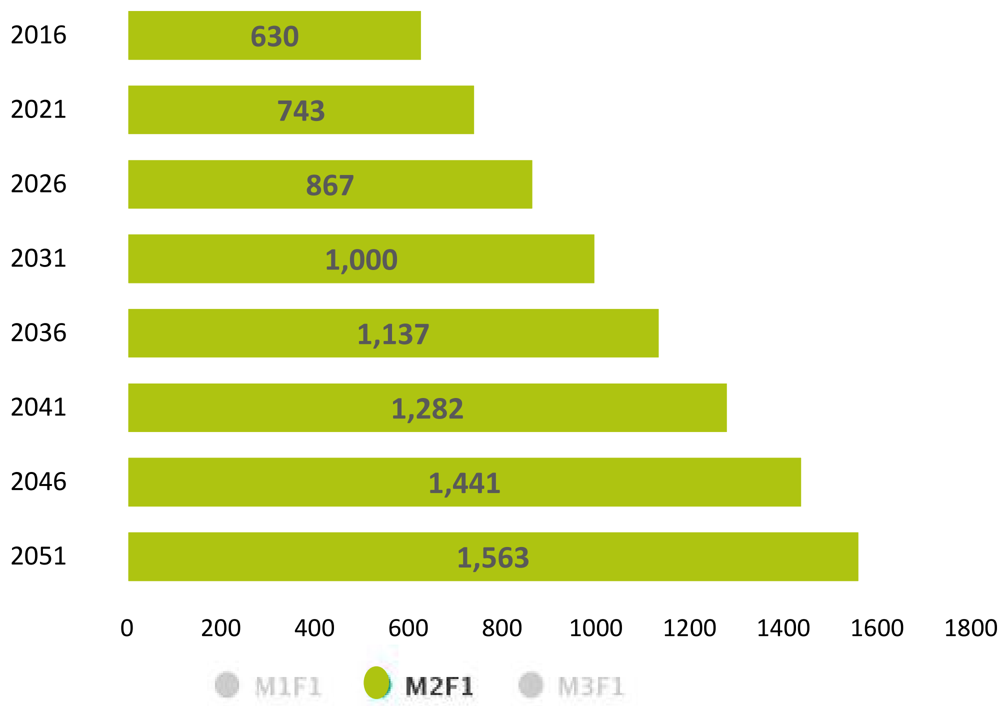
Total population to hit 5.5 million by 2031

Figure 2.1 Population projections by selected assumptions, 2016 – 2051



Population over 65 years of age to hit 1 million by 2031

Figure 2.10 Projected population aged 65 years and over, 2016 – 2051

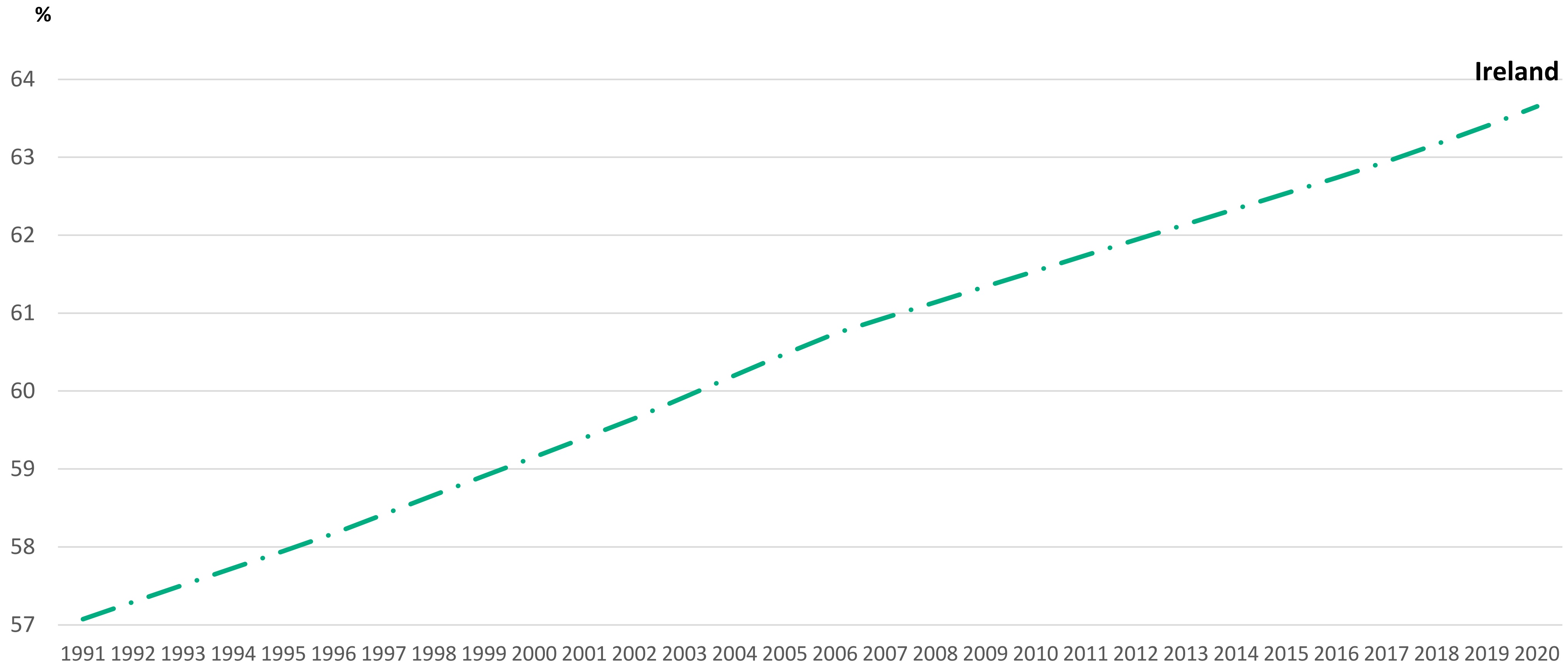


Source: CSO Ireland

From the CSO M1F2 model projection (Total Fertility Rate at 1.8 over the entire period to 2051; annual net inward migration of 30,000 persons from 2017 onwards), 6.5 million projected for Ireland in 2051 – a 41.2% increase. Growing levels of dependence within the population as the projections show the growing population is largely fueled by a growing cohort of older people. Historically, Ireland has had a larger dependency rate of those under 14 years old when compared to those over 65. This is projected to reverse by 2031.

Increased urbanisation in Ireland, 1991 to 2020

https://data.worldbank.org/indicator/SP.URB.TOTL.IN.ZS?end=2020&locations=IE&start=1991

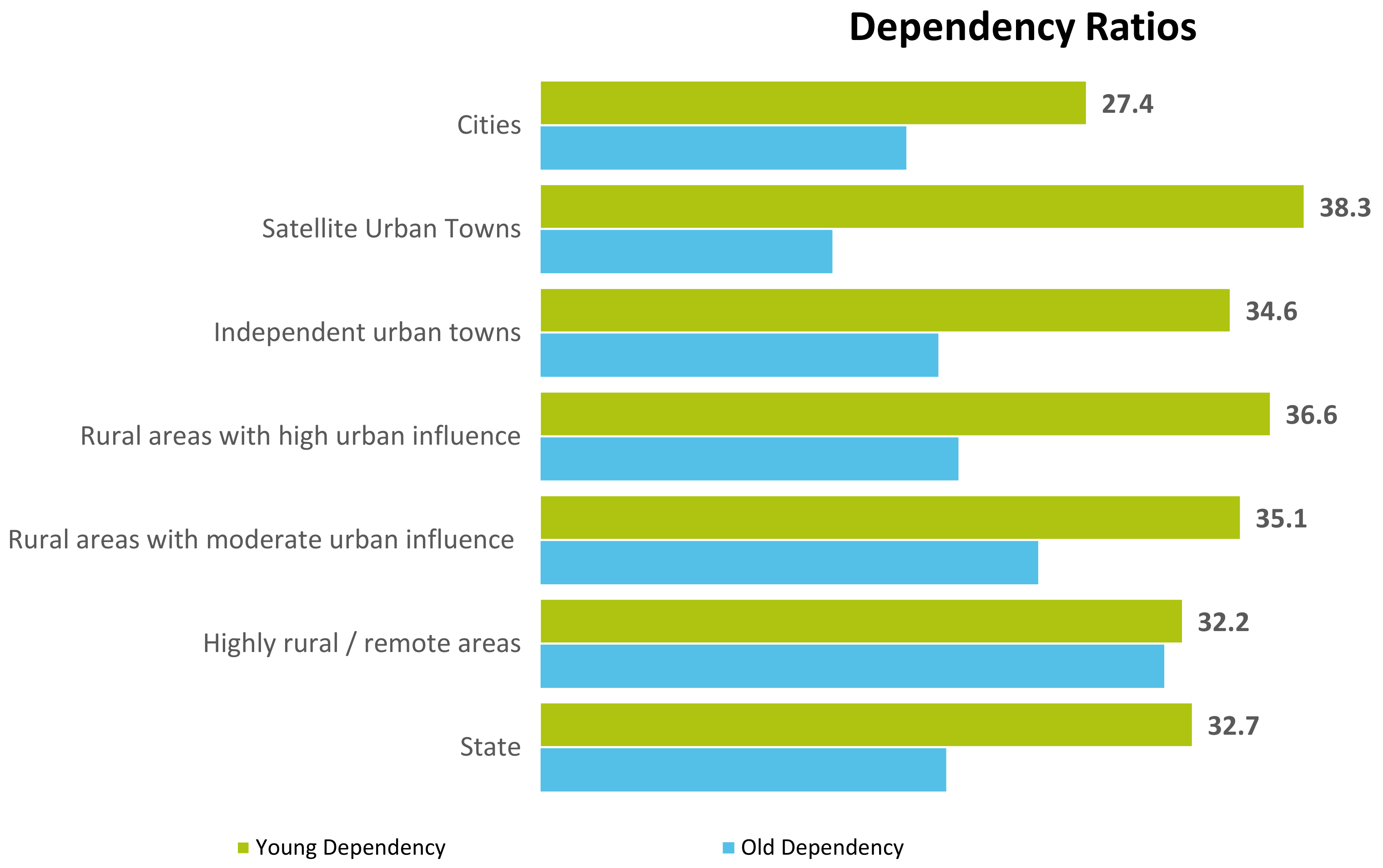


There has been a steady increase in those living in urban areas in Ireland between 1991 (57.1%) and 2020 (63.7%). Major technological and behavioural changes have shifted the make up of society on a labour basis, which in turn feeds into the geography of where people reside. This is exemplified by the major decrease in farming communities, with farmers now representing 7.1% of total Irish labour market in 2019(1). This is down from 12% in 1991 (2).

Urban vs Rural: Young vs old dependency

Dependents are defined as people outside the working ages of 15 to 64.
Young dependency: Anyone under 16
Old dependency: Anyone 65+

https://www.cso.ie/en/releasesandpublications/ep/p-urli/urbanandrurallifeinireland2019/income/



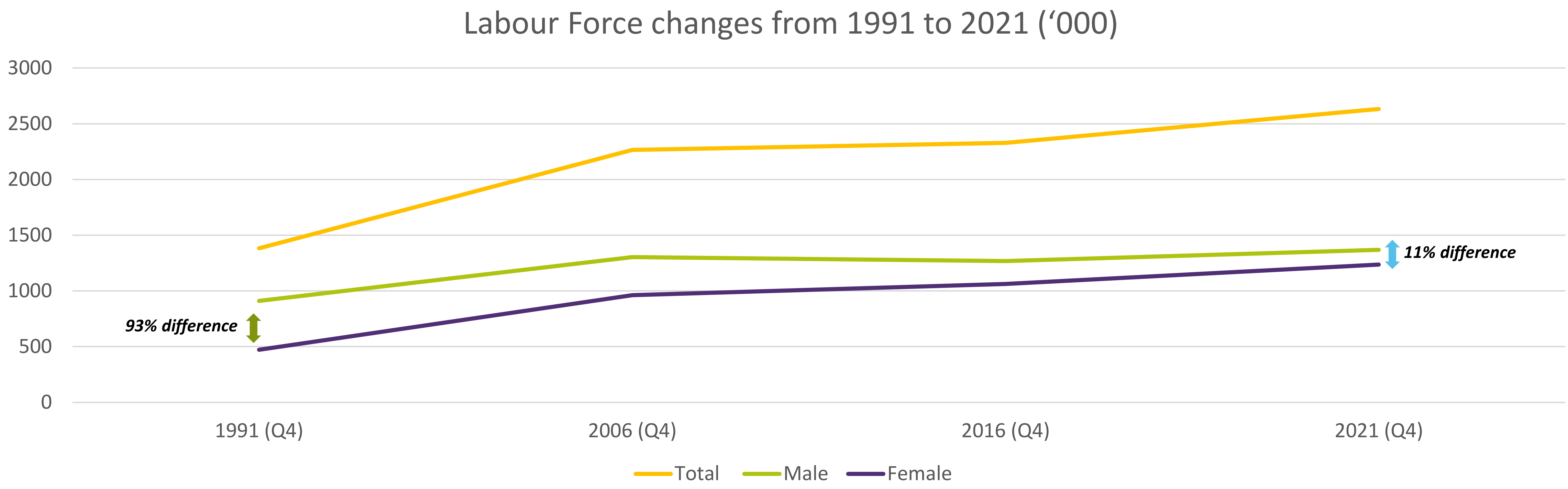
There are far fewer older dependents in urban areas, in comparison to rural areas. This is a particular issue given the usually higher medical needs of older cohorts, given the lack of medical resources within rural communities. This is exemplified by the fact that everyday services are 3 times further away in rural settings as they are in urban areas, with the average hospital being 30km away in rural areas compared to 12 km in urban areas (1).

Women in the workforce vs men

CSO, ILO Employment Rate Q4, 2021

Labour Force movements

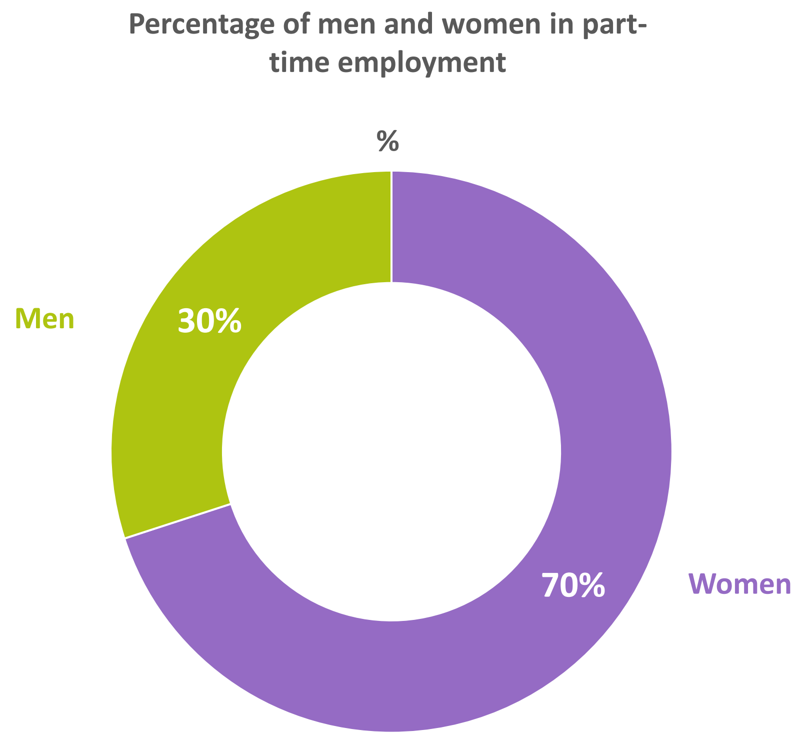
CSO

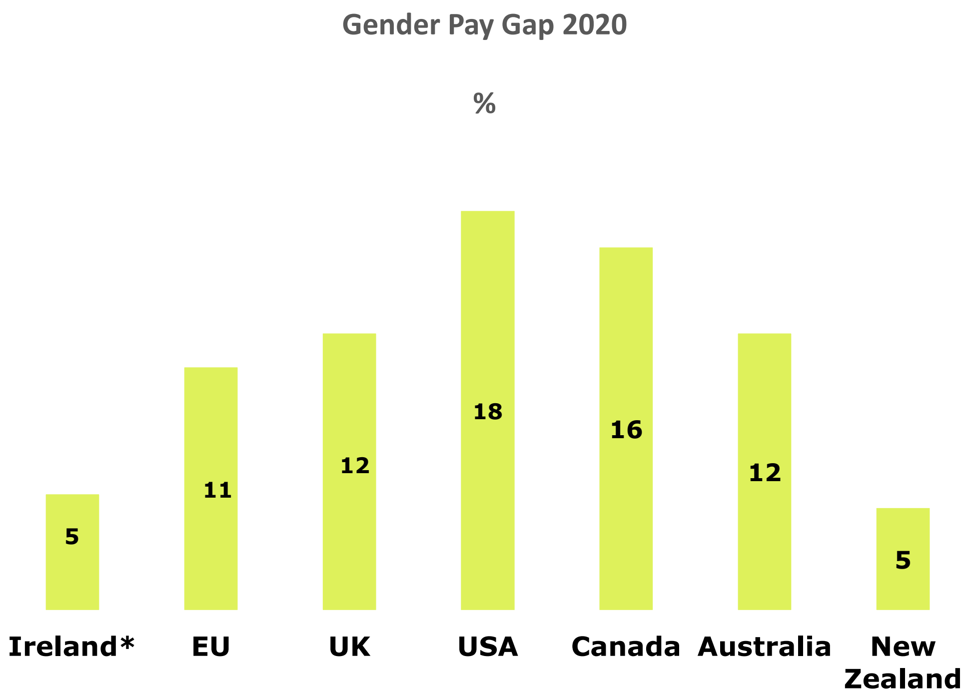


Though women fall below men in terms of employment rate, we see that there is significantly more women in the workplace nowadays compared to 1998 (almost 20% points more). It should be noted that with two income households on the rise, this will contribute to increased prices in a range of areas; housing in particular. The current employment rate among women also exceeds rates seen in 2007 at the peak of the Celtic Tiger. This may well have been helped by the movement to remote working as many mothers found that they could participate in the labour market once more. It is interesting to note that the gap between male and female employment has narrowed significantly following the 2008 recession and, as we begin to move out of the pandemic, the gap has narrowed even further.

In terms of the number of men and women in the workplace, we can see that the gap has narrowed significantly over time, with a 162% increase in women in the labour force, compared to a 50% increase for men. This has resulted in the gap between men and women narrowing from a 93% difference between men and women in 1991 to an 11% difference in 2021.

Unequal employment

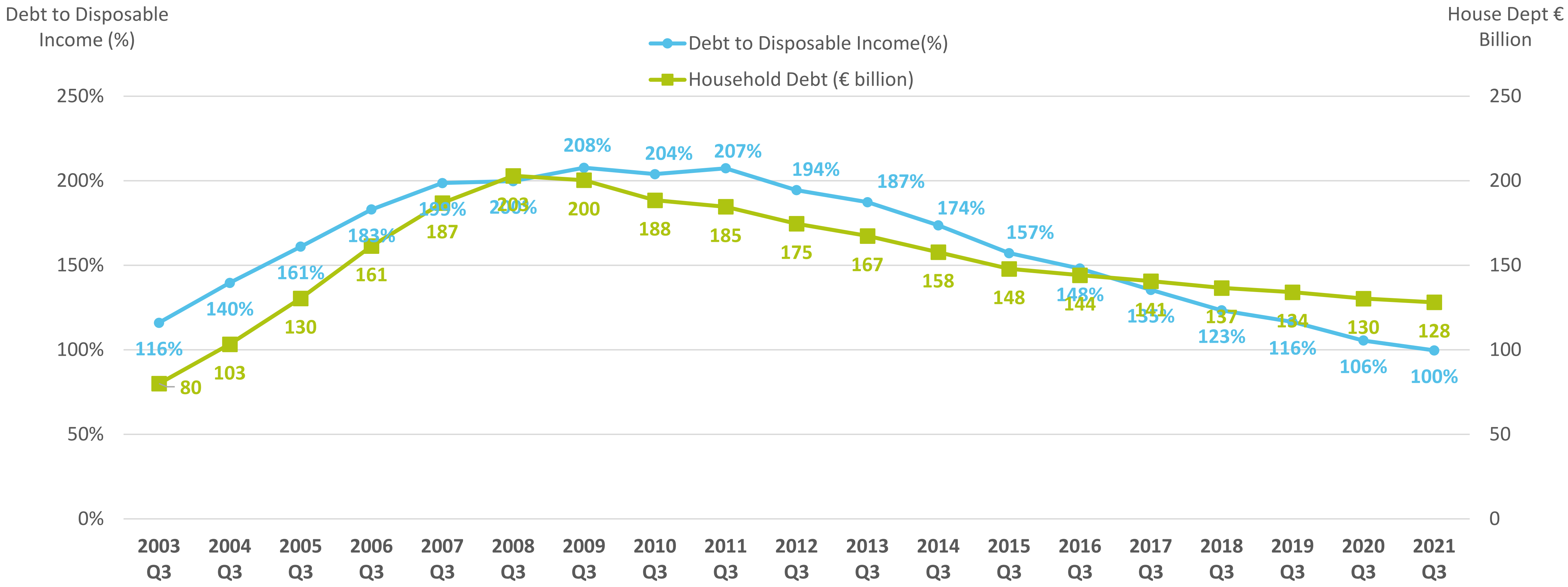




* 2019 figures

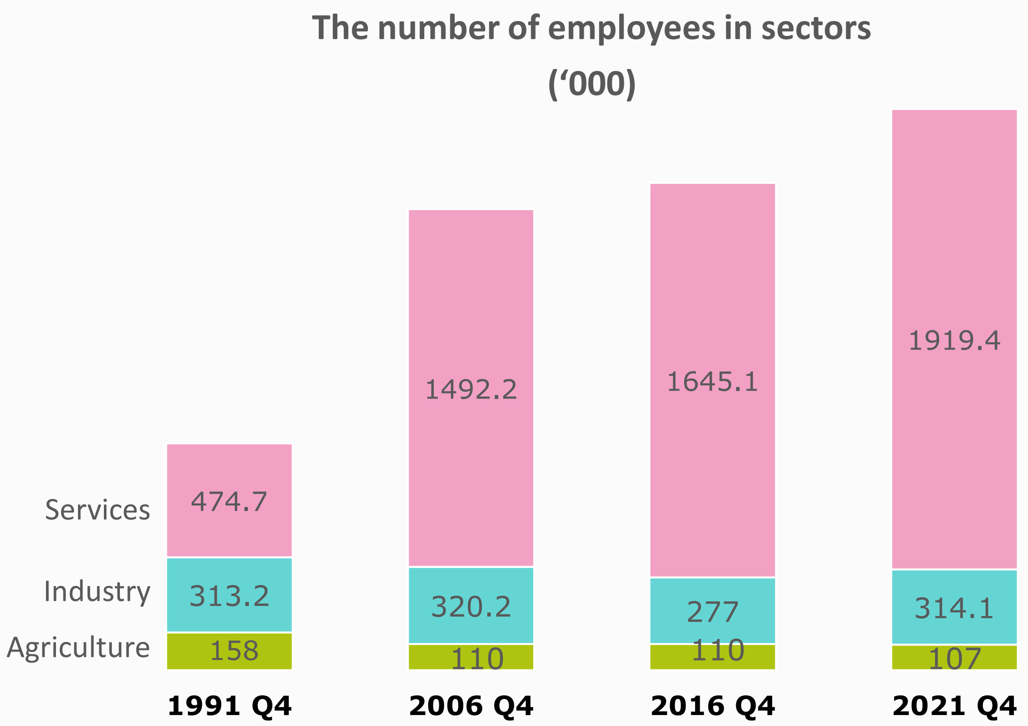
Women's relationship with work clearly differs from that of men's. Women are much more likely to be engaged in part-time work (most likely due to motherhood, and the pressure of juggling work and family). In terms of the gender pay gap, Ireland are performing much better than the EU average and most other English-speaking nations, with the exception of New Zealand. It should be noted that this data is based on figures from 2019, with some suggestions that the pay gap has risen in recent years, particularly during the pandemic with estimations that, for every €1 a men earns, women get 86 cent. This indicates a 14% gender pay gap.

Household debt



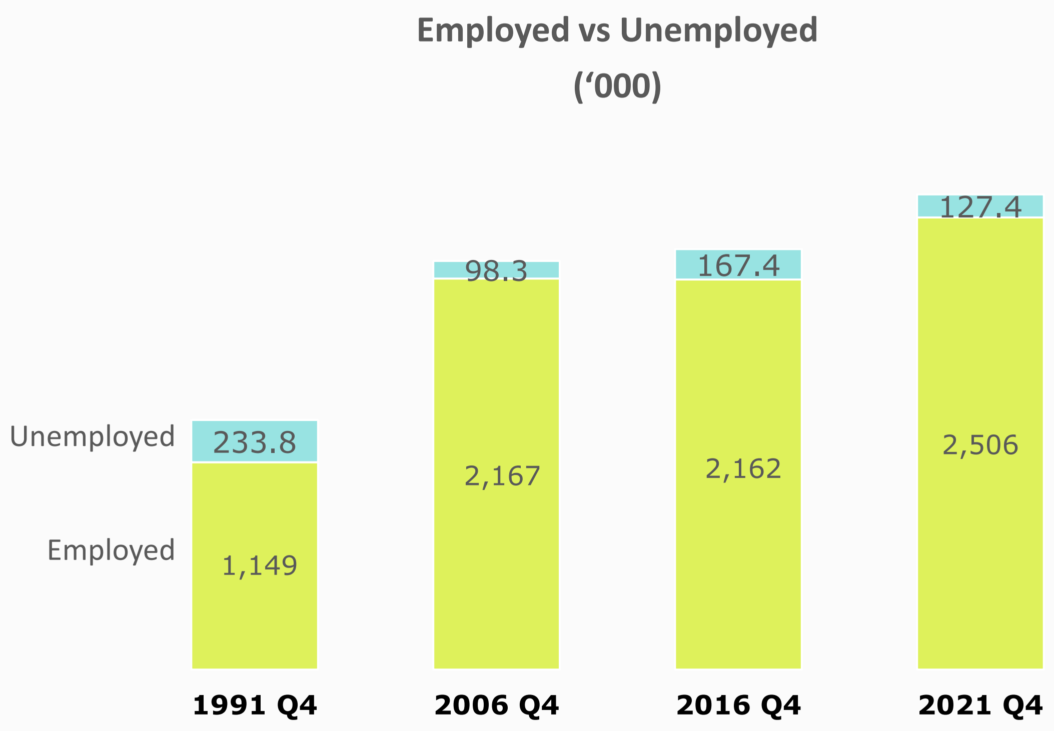
We can see that household debt has been decreasing year-on-year since 2008 in absolute terms, while the percentage compared to disposable income increased between 2008 and 2011, as salaries decreased and unemployment rose. This has decreased since then, with major decreases seen from the beginning of the pandemic, with lockdowns resulting in little opportunity to spend money, while many worked from home or received government supports. The actual level of debt has also decreased as mentioned, though this is not reducing at the same rate.

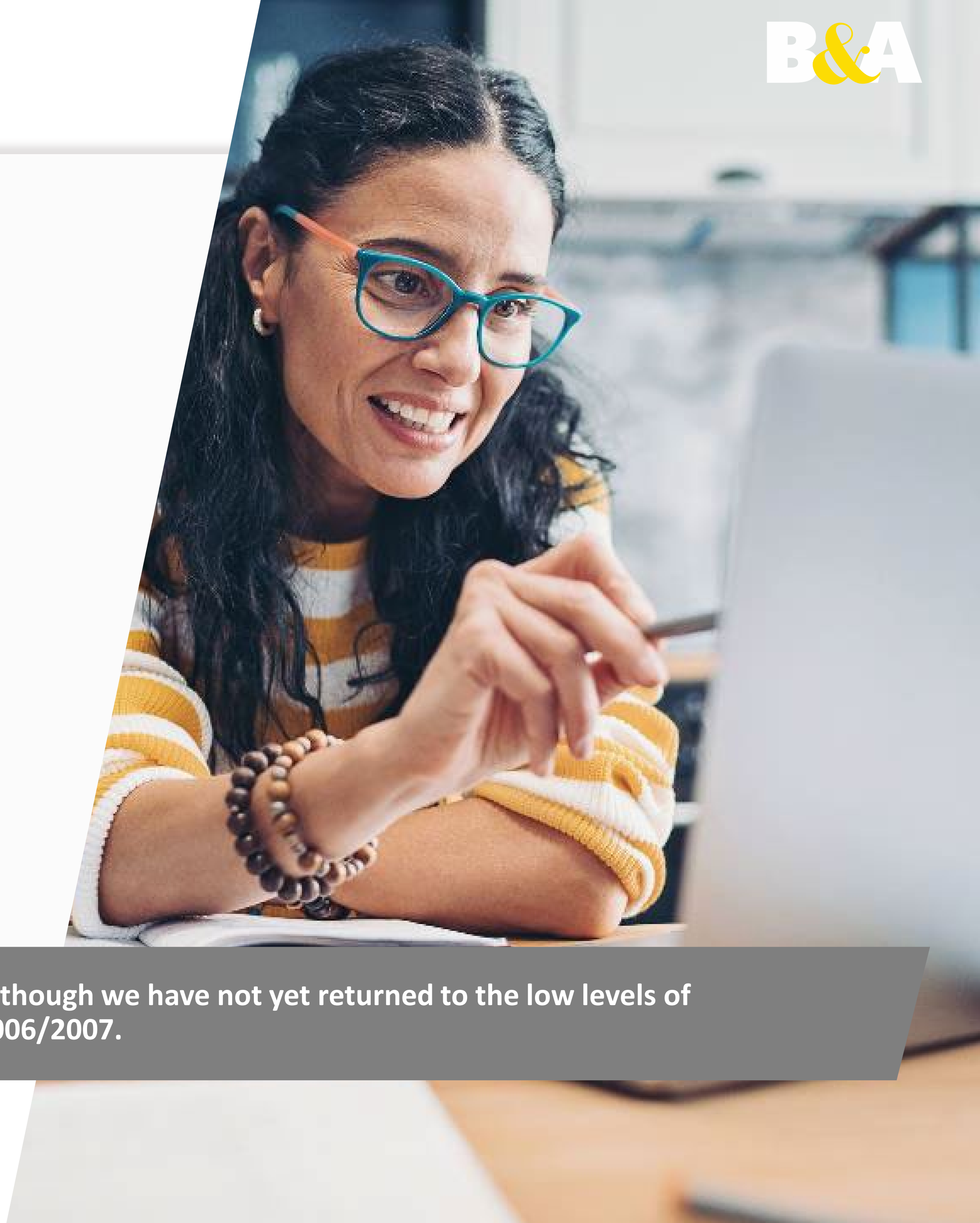
Labour force sectors



Since 1991, major shifts in the labour force are not only related to gender, but also the type of work we do. There have been significant increases in the service industry as the continued movement toward technology has automated a great deal of physical and industrial labour.

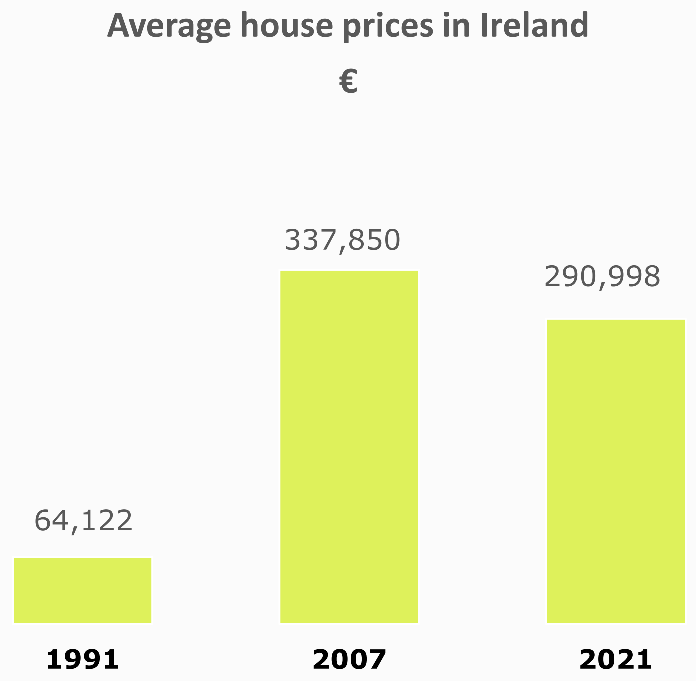
Employment vs Unemployment





Employment increasing while unemployment decreasing since 1991, though we have not yet returned to the low levels of unemployment seen in 2006/2007.

Housing in Ireland



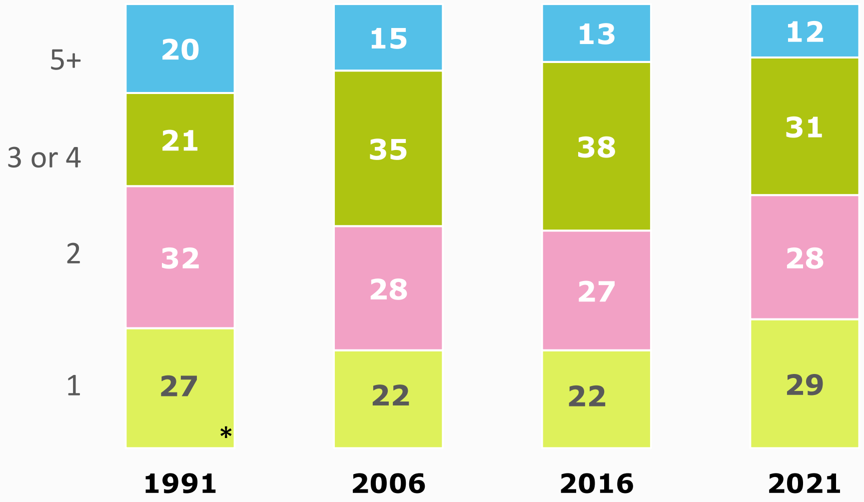
Increase in dual-incomes, population, and urbanisation likely all factors in this major rise in prices.

Throughout the last 30 years, we have seen average house prices significantly increase, particularly during the Celtic Tiger Years which peaked in 2007. Following this, there was a significant dip in prices though this has been steadily increasing. In 2021 we have seen major increases in prices of 8% as a result of lack of supply and the various lockdown periods stalling construction. Significant increases have been seen in Dublin in particular, with a growing urban population and a lack of appropriate housing causing a sharp rise in prices from €76,075 in 1991 to €405,259 in 2021.

Household size reducing

** Only private household data available*

Size of Households
(%)



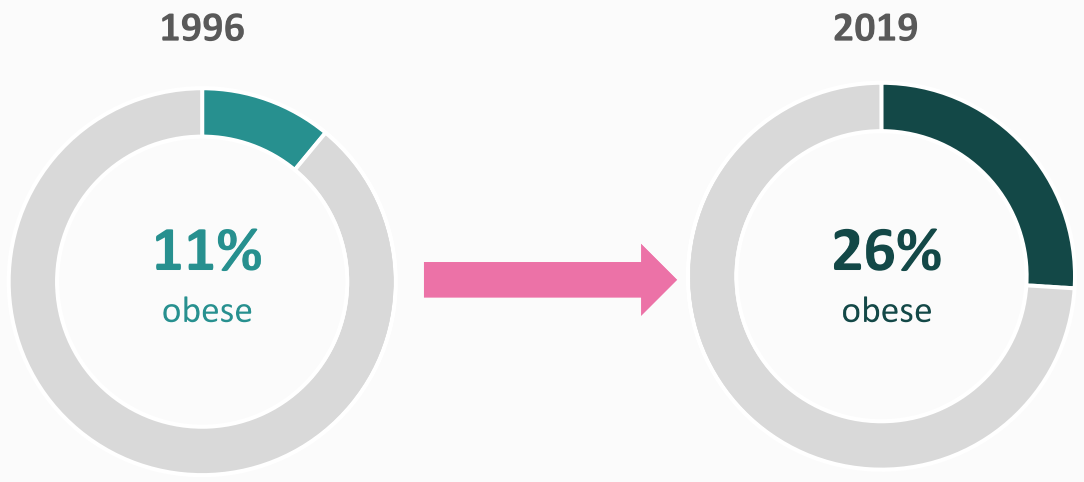
	1991	2006	2016	2021
Mean	3.34	3.14	2.94	2.81

There appears to be increases in the number of 1 & 2 person households in 2021, compared to 2006 & 2016, alongside a steadily decreasing mean number of persons per household since 1991. This highlights the increased individualisation within the household, with fewer people having children and, of those who do have children, less children.

Obesity in Ireland: A more obese nation

Obesity Rate 1996 vs 2019

%



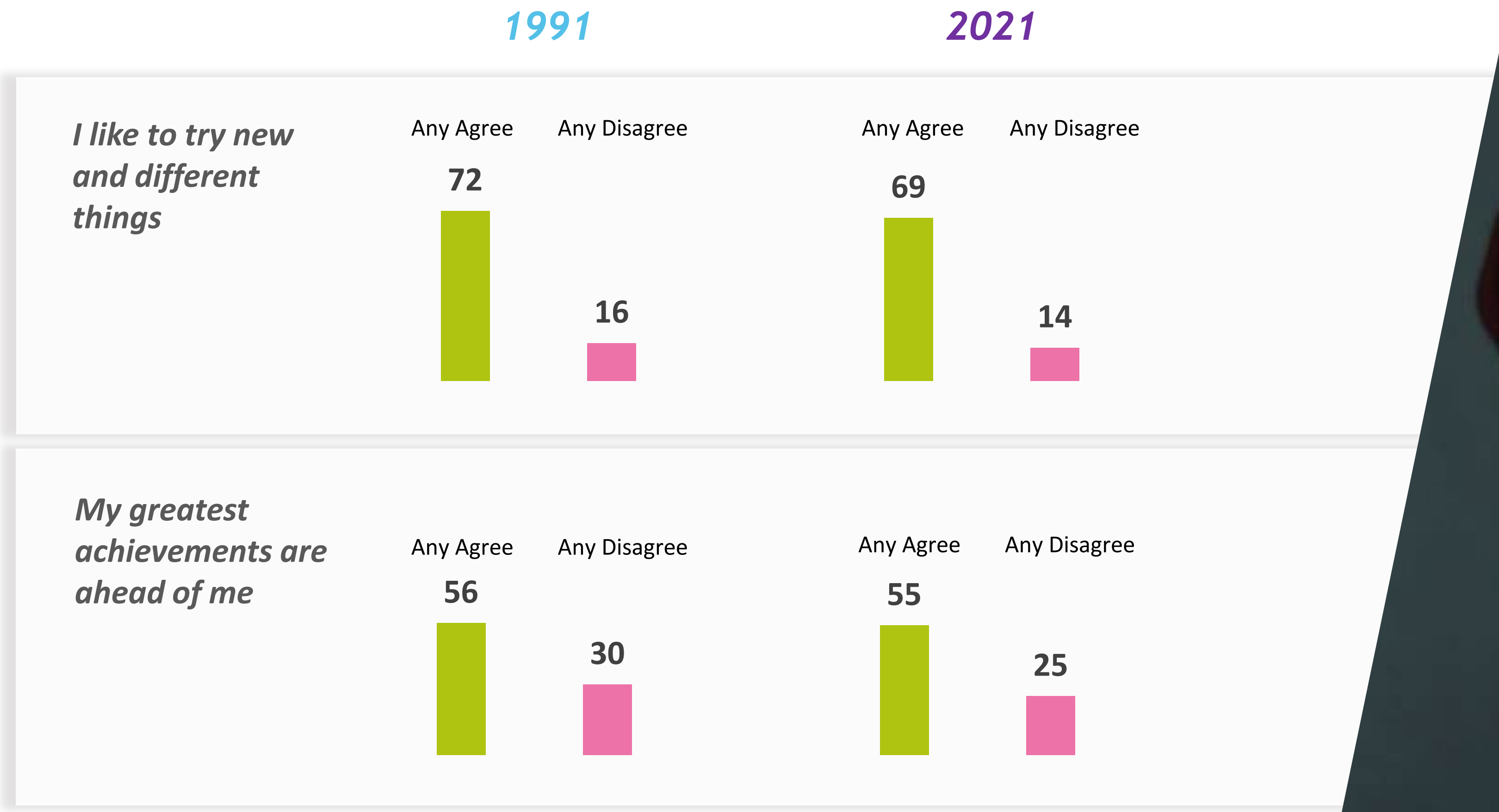
Second only to Malta in the EU

There has been a steady increase in the rate of obesity since 1996, with Ireland now being ranked as the EU's second most obese state, after Malta. This is notable given the increased rate of exercise and physical activity highlighted within this research, with some significant increases seen since 1996. It is estimated that the overall cost of obesity experienced in Ireland will rise to €5.4 billion per annum in 2030, with the health service being a particular bearer of this cost. This is putting severe pressure on the healthcare system which is viewed as the top issue in Ireland with half mentioning this.

Not everything has changed since 1991/95

Many general outlooks & behaviours remain the same as 1991 - not everything changes

Base: All adults 16+ N = 1,005



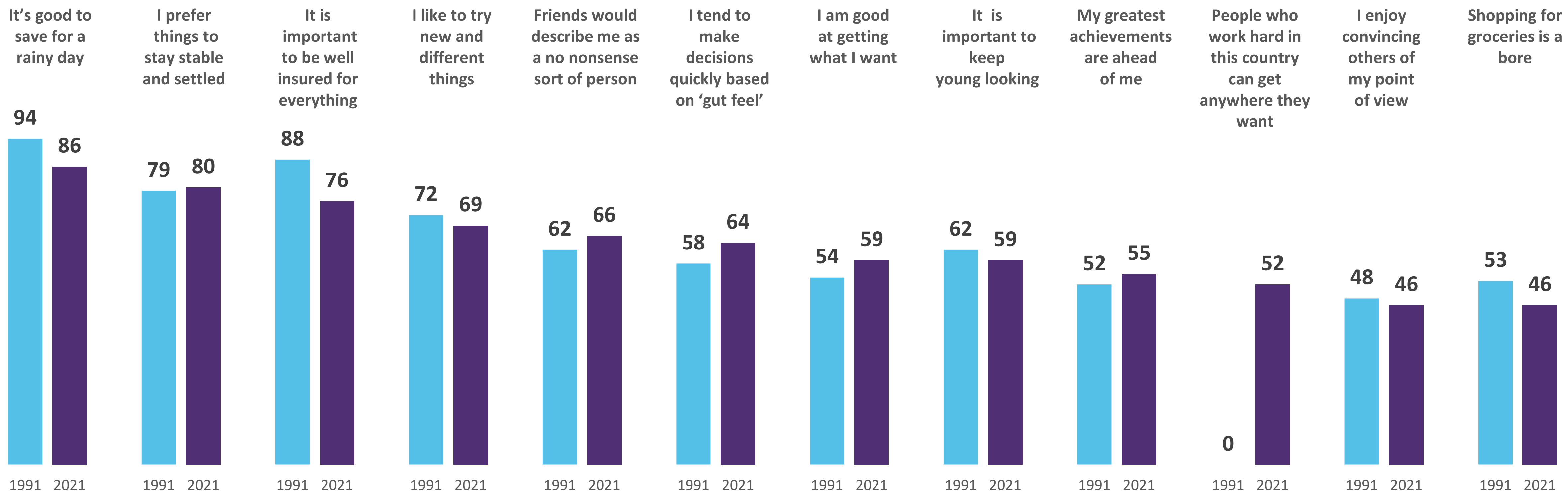
General outlook has largely remained the same, with only slight variances since 1991. However, it should be noted that there is an openness to try new things and a relatively strong sense of positivity among the population, particularly when considering the tumultuous environment seen in 1991 and 2021.

***F2F**

General outlooks & behaviours - 2021 vs 1991

Base: All adults 16+: 1,005

Any Agree
%



*F2F

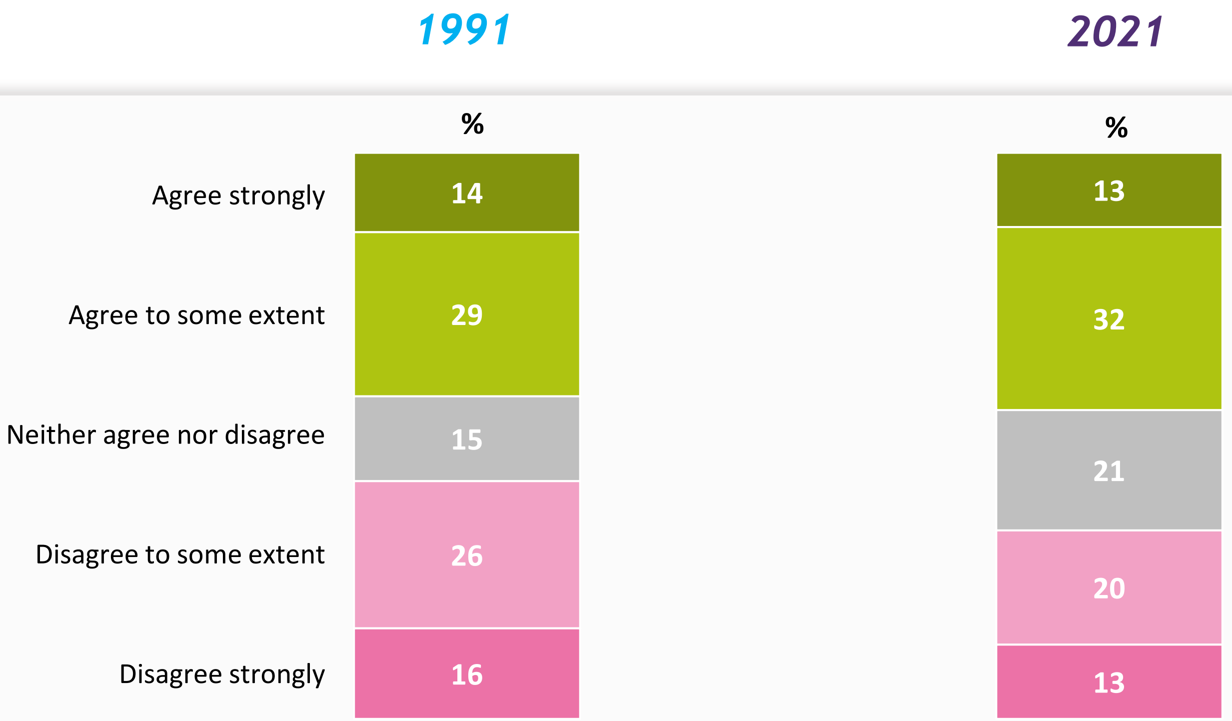
The majority of attitudes have remained quite stable since 1991, however there is a decline in more prudent behaviours, for example saving for a rainy day and being well insured. We also appear to making decisions quicker based on 'gut'!

Q.2a/2b To what extent you agree or disagree ...

Fashion focus very similar between 1991 & 2021

Base: All adults 16+ N = 1,005

I take a lot of pride in keeping up to date with fashion



	1991	2021
Any Agree	43	46
Any Disagree	42	33

Very little change here with fashion remaining a point of pride for almost half the population. However, there is movement in relation to disagreeing with this statement with only a third disagreeing in 2021 compared to 42% in 1991, indicating a more consumerist mindset with less objection to fashion as a point of pride.

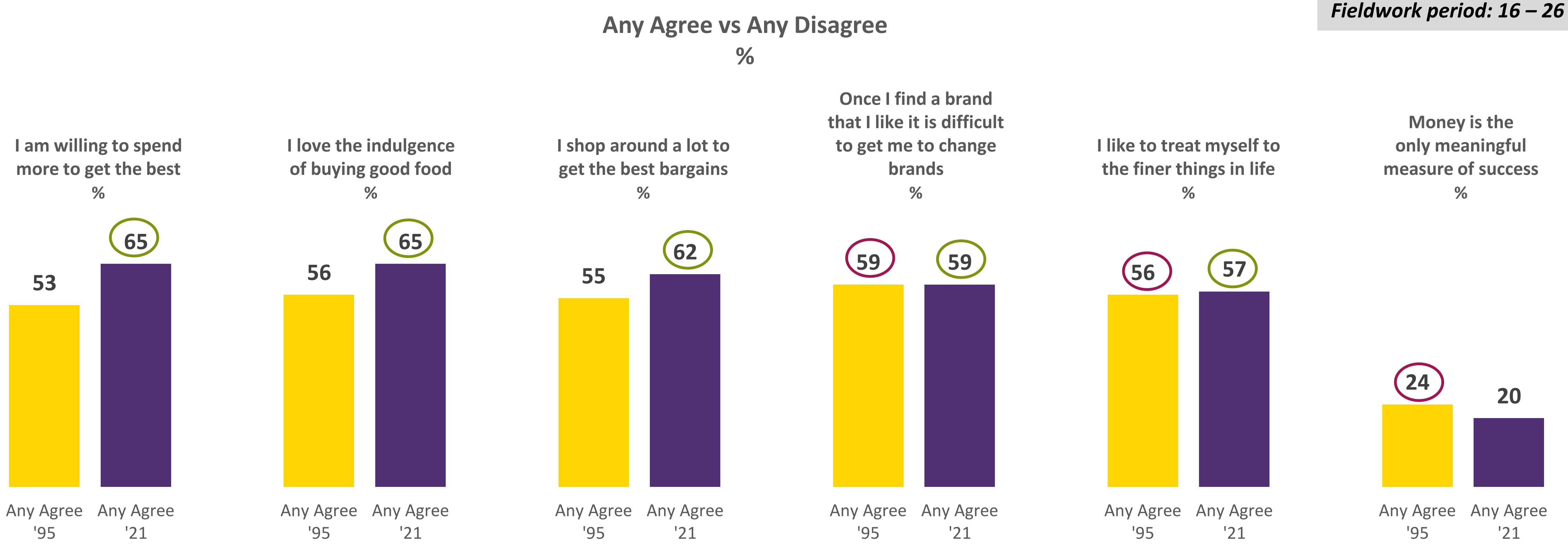
Q.2a to what extent do you agree or disagree …

***F2F**

Consumerism 2021 (vs 1995): We still like to treat ourselves to the finer things in life and as difficult to prompt brand switching

Base: All adults 16+: 1,005

***F2F**
Fieldwork period: 16 – 26 August



Attitudes have not shifted significantly across the various metrics, with the exception of an increase in willingness to spend more to get the best & an increase in a love of buying good food. Both of which indicate increased indulgence. However, there is also a marked increase in shopping around for the best bargains and a decrease in the belief that well-known brands are better than shop own brands. This indicates a possibly greater marketing literacy.

Q.2a/2b To what extent you agree or disagree ...

Consumerism 2021 x demographics

Base: All adults 16+: 1,005

Any Agree 2021

Base : All Respondents	Total	Gender		Kids in HHold		Age					Social Class			Region			
		Male	Female	Yes	No	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Leinster	Munster	Conn/ Ulster
UNWTD	***1005***	***495***	***510***	***380***	***625***	***149***	***151***	***283***	***232***	***190***	***484***	***472***	***49***	***283***	***265***	***280***	***177***
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I am willing to spend more to get the best	65	64	66	65	65	61	67	66	67	62	74	58	58	75	61	65	56
I love the indulgence of buying good food	65	59	72	65	66	63	71	65	67	61	67	65	57	70	62	70	57
I shop around a lot to get the best bargains	62	58	67	65	61	60	61	67	64	56	59	65	63	54	70	62	64
Once I find a brand that I like it is difficult to get me to change brands	59	58	61	58	61	55	56	60	63	61	62	57	62	61	56	64	56
I like to treat myself to the finer things in life	57	54	60	57	58	64	64	56	53	54	63	53	49	64	52	62	49
On the whole I think well-known brands are better than shops own brands	48	50	47	50	47	47	44	49	52	47	51	43	68	45	38	67	41
I take a lot of pride in keeping up to date with fashion	46	36	55	50	43	61	56	46	40	32	49	42	53	49	43	52	36
Generally speaking, well-advertised brands tend to be better quality than brands you don't see much advertising for	46	46	46	50	43	47	42	48	50	40	48	43	53	45	38	63	34
I am usually the first in my group of friends to know about new brands and products	32	32	31	34	30	38	37	35	28	21	35	28	36	39	23	43	17
Money is the only meaningful measure of success	20	21	19	22	19	26	23	16	20	18	20	20	22	20	19	25	13

***F2F**

Those in Connacht/Ulster under-index across the majority of these metrics, particularly those relating to indulgence and increased consumerism, while those in Munster and too a lesser extent, Dublin, are more likely to agree with the majority of indulgence based statements. Middle class cohort is also more likely to agree with these statements also. These variances point to a polarised society.

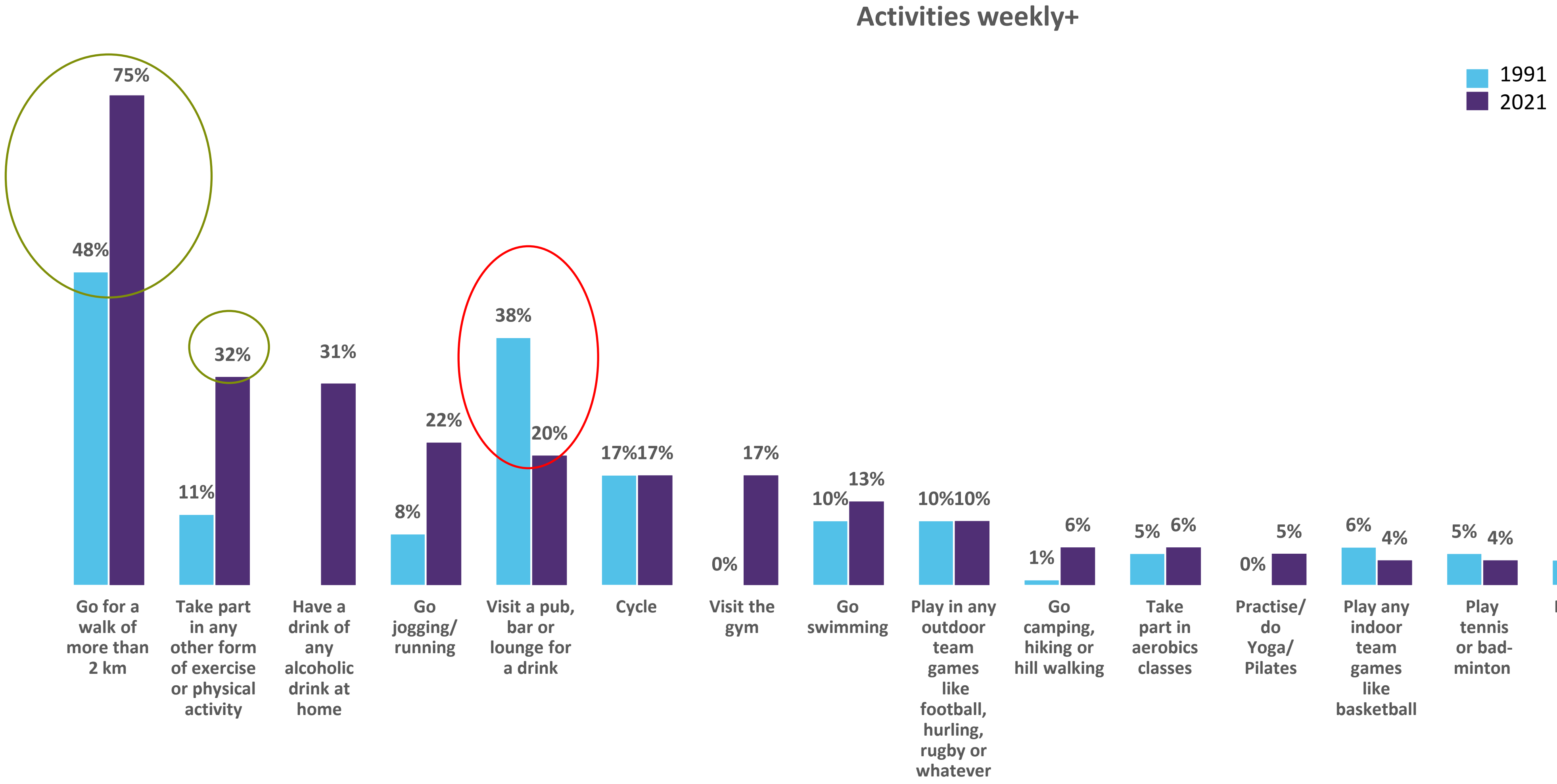
Q.2a/2b To what extent you agree or disagree ...

Lifestyles versus 1991/95

We have become more physically active (2021 vs. 1991)

Base: All adults 16+: 1,005

*F2F
Fieldwork period: 16 – 26 August*



A growing focus on health and wellbeing is clear with much higher rates of exercise and outdoor activities in 2021, paired with less alcohol consumption (in a bar setting). It is important to highlight that this growth in exercise, particularly in terms of the growth in walking likely comes as an impact of COVID-19 and the subsequent lockdowns. This may also explain the reduction in attendance at bars and pubs. However we also included the Visit pub question in May 2022 and a similar 1 in 5 visiting was recorded.

Q.1 How often do you take part in any of the following activities?

Activities take part in weekly + (2021 x demographics)

Base: All adults 16+: 1,005

Activities weekly+

	Total	Gender		Age					Social Class			Region				Kids in HHold	
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Leinster	Munster	Conn/ Ulster	Yes	No
UNWTD	***1005***	***495***	***510***	***149***	***151***	***283***	***232***	***190***	***484***	***472***	***49***	***283***	***265***	***280***	***177***	***380***	***625***
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Play in any outdoor team games like football, hurling, rugby or whatever.	10	16	5	29	17	8	3	1	15	7	9	8	9	17	6	11	10
Play any indoor team games like basketball	4	6	2	12	3	5	1	1	5	3	2	4	2	7	1	5	3
Play tennis or badminton	4	4	3	6	3	5	2	1	5	3	2	4	2	6	2	3	4
Play golf	4	6	1	2	3	3	6	3	7	1	4	4	3	4	5	2	5
Cycle	17	24	11	37	21	17	12	6	23	13	13	26	15	16	9	20	16
Visit the gym	17	21	13	30	29	20	7	2	23	12	12	18	17	19	10	16	17
Go swimming	13	14	12	15	19	15	13	4	18	9	14	15	13	15	9	16	11
Practise/do Yoga/Pilates	5	2	8	2	9	8	4	2	8	3	2	5	7	6	2	6	5
Play squash, handball or racket ball	1	2	1	3	3	1	-	0	2	1	-	3	1	1	-	1	1
Go fishing, either fresh or salt water	1	1	1	2	1	2	1	1	2	1	-	1	1	2	1	1	1
Go camping, hiking or hill walking	6	5	7	5	8	7	5	5	6	5	12	8	6	5	4	7	6
Go jogging/running	22	26	18	41	26	29	11	2	29	15	24	24	16	27	19	27	18
Go sailing or wind surfing	1	1	1	2	1	1	1	-	2	1	-	2	1	1	-	1	1
Go for a walk of more than 2 km	75	71	78	81	71	79	75	67	81	72	55	87	70	68	73	77	74
Take part in aerobics classes	6	3	9	6	8	8	4	2	8	4	7	9	7	4	2	8	5
Take part in any other form of exercise or physical activity	32	35	29	50	37	33	30	12	41	25	22	37	34	28	25	34	30
Visit a pub, bar or lounge for a drink	20	26	14	29	22	19	20	13	24	17	20	26	14	22	17	19	21
Have a drink of any alcoholic drink at home	31	34	29	26	31	37	34	23	34	30	21	41	27	27	28	34	29

There are some clear demographic divisions in terms of physical activity, with men much more likely to engage in team sports and gym going, while women are more likely to take part in moderate physical activity with a solo focus such as walking, yoga, and camping/hiking. There are unsurprisingly divisions across age here with younger people much more likely to engage in these physical activities. Class also plays a key role, with middle class much more likely to engage in any physical activity.

Q.1 How often do you take part in any of the following activities?

***F2F**

Big changes in weekly activities between 2021 & 1991 - reduction in communal activity

Base: All adults 16+ 1,005

Go to church service/mass

2021: 30%
1991: 75%

Play computer/video games

2021: 20%
1991: 9%

Go to the cinema

2021: 15%
1991: 19%

Go to parties

2021: 10%
1991: 17%

Place any other kind of bet

2021: 9%
1991: 6%

Go to the theatre or concerts

2021: 7%
1991: 8%

Place a bet on a race (horses, dogs, etc.)

2021: 7%
1991: 8%

Attend nightclubs

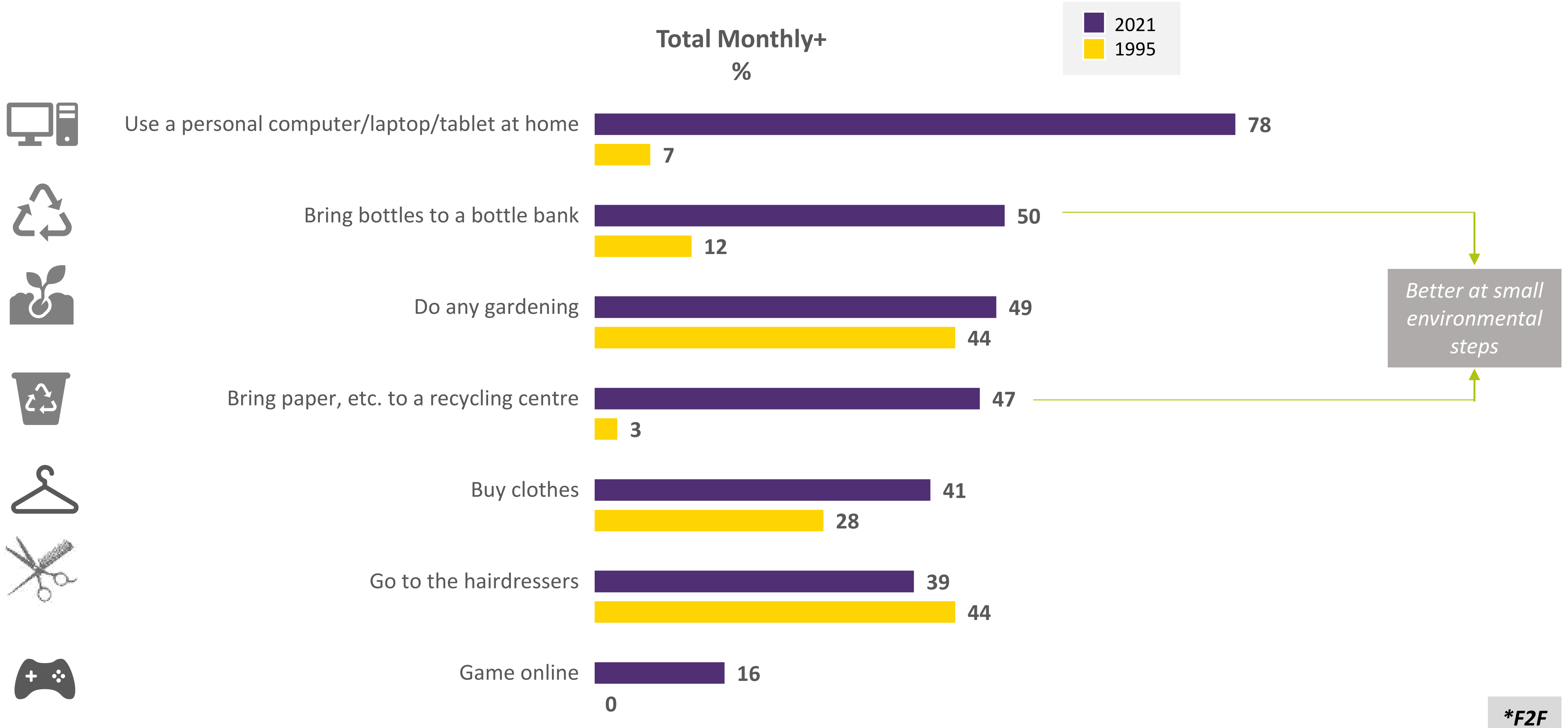
2021: 6%
1991: 23%

Clear reduction in church service attendance, indicating a decreased importance of religion in society. There is also a marked increase in video games, indicating the growth of digitalisation and indoor play. COVID-19 impacts seen in regard to social activities.

Q.3 How often do you engage in any of the following activities ...

Big increase of tech role in our lives

Base: All adults 16+ 1,005



*F2F

All bar one activity listed has grown since 1995, with a growing focus on tech and more sustainable practices such as visiting bottle banks and recycling centres. However, consumption too has grown with a rise in the purchase of clothing.

Q.3 How often do you engage in any of the following activities ...

Activities take part in monthly+ x 2021 demographics

Base: All adults 16+: 1,005

Activities monthly+

	Total	Gender		Kids in HHold		Age					Social Class			Region			
		Male	Female	Yes	No	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Lein-ster	Mun-ster	Conn/ Ulster
UNWTD	***1005***	***495***	***510***	***380***	***625***	***149***	***151***	***283***	***232***	***190***	***484***	***472***	***49***	***283***	***265***	***280***	***177***
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Use a personal computer/laptop/tablet at home	78	78	77	87	71	88	88	88	75	46	88	70	60	81	74	78	77
Bring bottles to a bottle bank	50	52	49	57	47	32	52	60	59	39	57	45	52	50	55	43	56
Do any gardening	49	48	51	46	52	21	28	53	64	68	49	48	64	51	46	51	50
Bring paper, etc. to a recycling centre	47	47	47	53	44	33	48	54	52	41	52	43	49	51	58	44	30
Buy clothes	41	33	49	49	35	55	48	46	37	20	46	37	35	46	39	50	22
Go to the hairdressers	39	38	40	38	39	46	41	39	35	35	44	34	47	39	33	50	30
Go to church service/mass	30	27	34	23	35	16	20	20	37	59	27	30	56	27	25	32	42
Play computer/video games	20	27	13	20	19	54	28	19	5	4	25	16	14	20	19	19	21
Game online	16	22	10	17	16	42	22	16	6	3	19	14	14	17	16	16	15
Go to the cinema	15	15	14	18	13	29	17	15	11	4	19	12	8	20	14	15	7
Go to parties	10	11	9	9	11	30	12	9	4	2	14	8	5	16	8	9	7
Place any other kind of bet	9	14	4	9	9	9	4	11	10	9	8	9	14	8	8	10	12
Go to the theatre or concerts	7	8	6	8	6	10	7	8	6	6	10	6	2	7	6	10	5
Place a bet on a race (horses, dogs, etc.)	7	12	2	6	8	7	4	6	8	10	7	7	8	7	6	8	6
Attend nightclubs	6	8	5	6	6	18	9	4	3	1	7	6	6	6	6	9	3

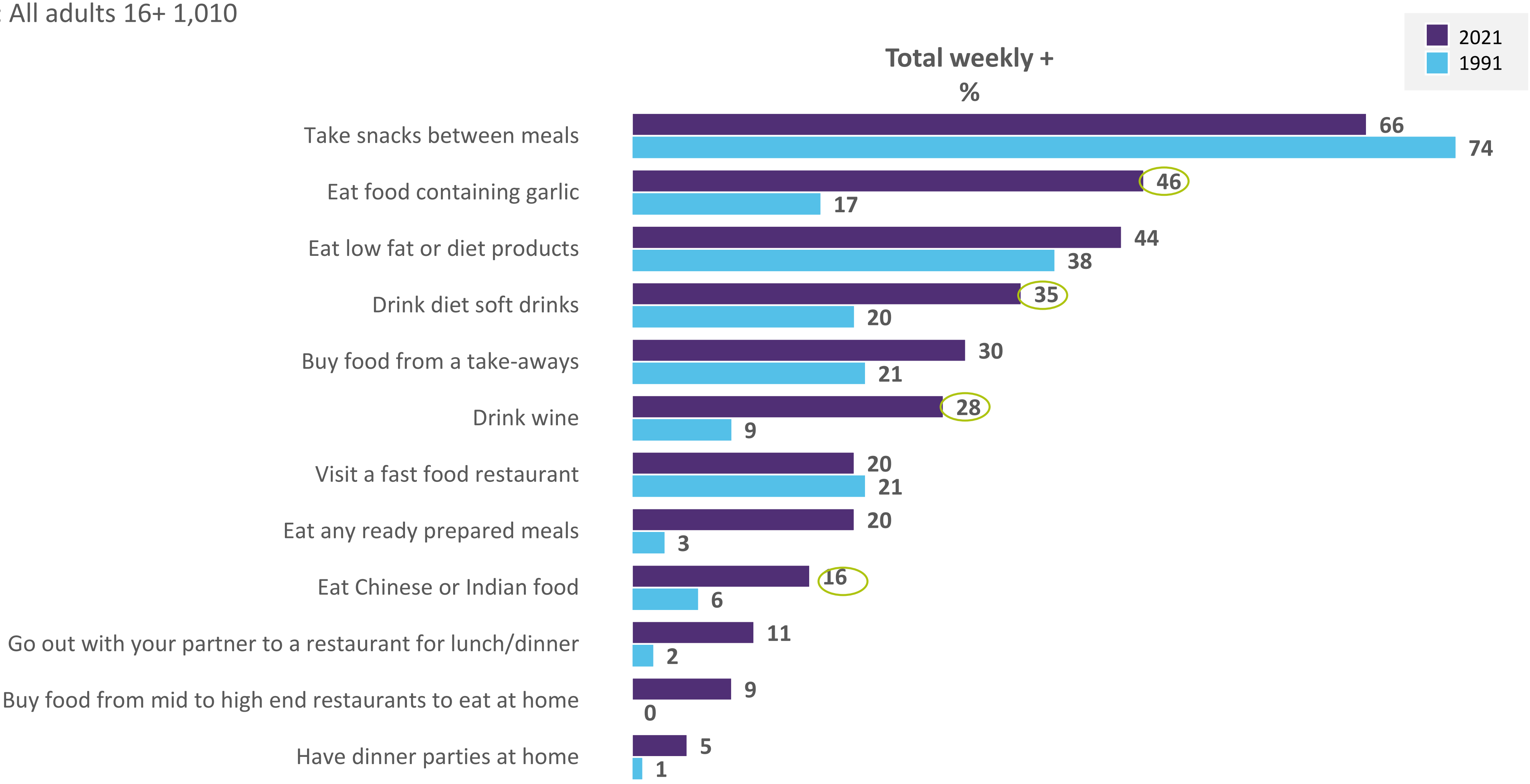
Many demographic trends present, particularly on age grounds, with younger cohorts engaging in more use of tech and more social activities, while older cohorts significantly under-index across these metrics, while over-indexing in attendance at church services, as do those in Connacht/Ulster. Middle class are more likely to use technology compared to working class cohorts.

Q.3 How often do you engage in any of the following activities ...

***F2F**

A more adventurous lot compared to 1991

Base: All adults 16+ 1,010



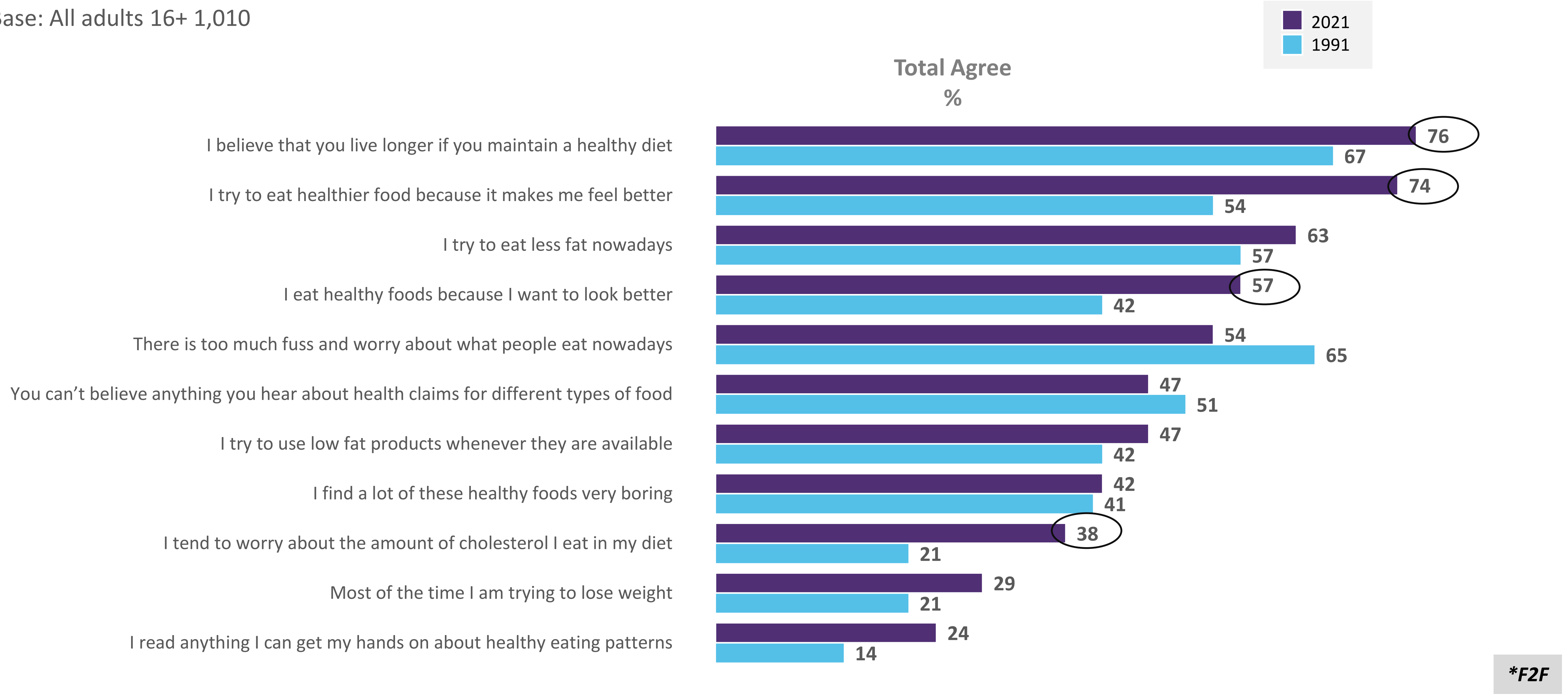
F2F

The Irish diet has become more adventurous since 1991, with a steep increase in the use of garlic, wine, and attendance at restaurants for lunch and dinner. In addition to this, there has been an indication that diets have become more controlled with a reduction in snacking between meals (though still high with 2 in 3) and an increase in low fat or diet products. However, this is juxtaposed by a marked increase in takeaways, likely due to a growth in accessibility.

Q.5 Now how about eating habits, how often, nowadays, do you do any of the following?

A healthier focus compared to 1991, despite our obesity issue

Base: All adults 16+ 1,010

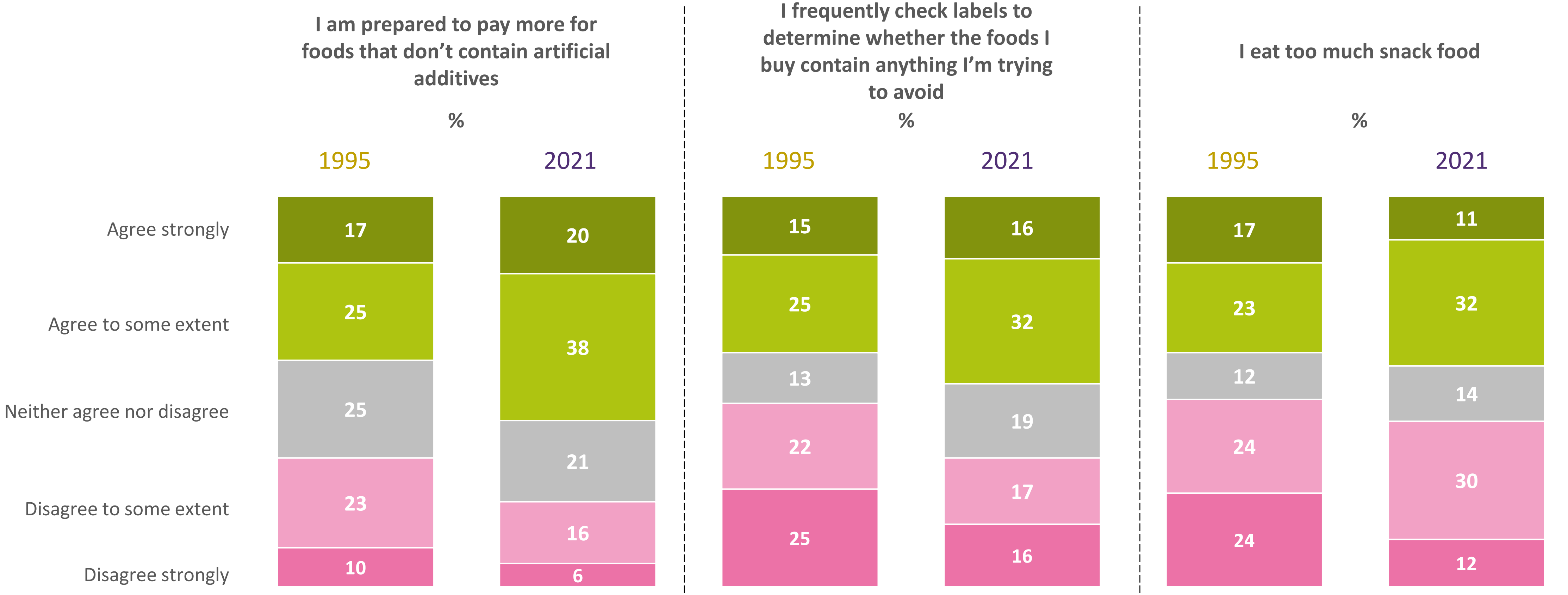


There is a greater understanding of the health benefits of maintaining a healthy diet with increases in belief that you live longer if a healthy diet is maintained, and that eating healthier food makes you feel better. There is also greater consideration of cholesterol and greater time given learning about healthy eating patterns.

Q.6 To what extent do you agree or disagree ...

More consideration given to food choices - Eating habits 2021 vs 1995 -

Base: All adults 16+: 1,005



Any Agree	**57**	**48**	**43**
Any Disagree	22	33	42
Any Agree '95	42	34	40

***F2F**

There appears to be more conscientious thinking in regard to diet and healthy eating, with increased willingness to pay more for foods that don't contain artificial additives (42% in 1995 to 57% in 2021) and to check labels to avoid certain ingredients in foods (34% to 48%).

Q.2a/2b To what extent you agree or disagree ...

The age of hyper uncertainty

We have just lived through the most extraordinary 2 years in most of our lifetimes

- In a totally unprecedented situation, we took totally unprecedented measures
- Enshrined in a series of words that have never been in our vocabularies before – lockdown, social distancing, mask mandates, vaccine passports, remote learning
- That in many ways ran counter to our most basic human requirements and needs
- The period has been characterised by huge amounts of anxiety around covid itself, along with the increasing and protracted impact of restrictions, the economic fallout
- All of which went on for much longer than we imagined it would.

We're only now starting to understand and work through the impact this mass trauma event has had upon us as a country.

And it's not over yet

- We have not achieved the comprehensive 'victory' over covid many of us thought we would.
- With all the sacrifices made at a population level, perhaps we assumed the payback would amount to more than this, which is best captured by another new phrase – 'living with'.
- We still worry about how this level of coping with covid can be maintained, what happens in the face of a new variant.

The level of closure we were hoping for hasn't materialised.

Hot on the heels of Covid we have more shocking and disruptive global shifts

Cost of living rises and global inflation

- Highest inflation levels in 42 years.
- Food/petrol prices notably rocketing.
- Scary price hikes being announced by energy companies, that many of us just do not know how we’re going to cope with.
- Governments and economic bodies seem powerless to do much about it (beyond tinkering round the edges).

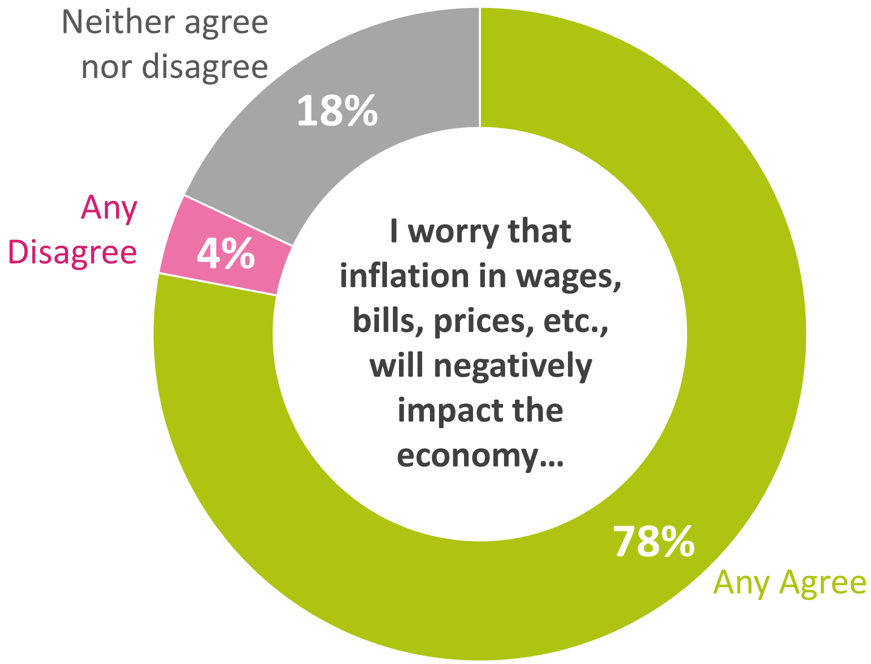
The war in Ukraine

- Unimaginable destruction and devastation that feels like it came out of nowhere.
- Upending the lives of Ukrainians who until recently were going about their day to day business just like ourselves.
- Human stories so powerfully conveyed on social media.
- Yet again, there seems little we can do to stop this in its tracks.

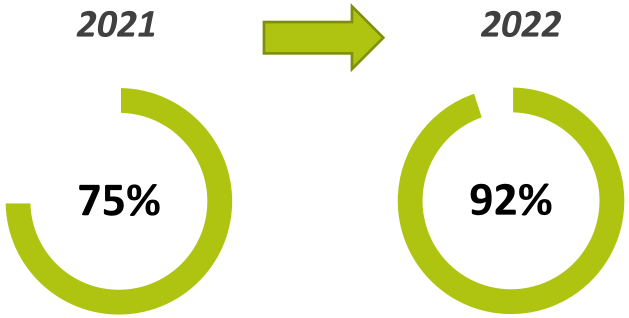
Our sense of how much control we have over our own destiny has been much diminished in the last few years and we have interest rate rises looming.

Unsurprisingly, concerns about inflation have rocketed

Base: All adults 16+ N = 1019



I have noticed the increase in the cost of goods and services (i.e. the cost of living)



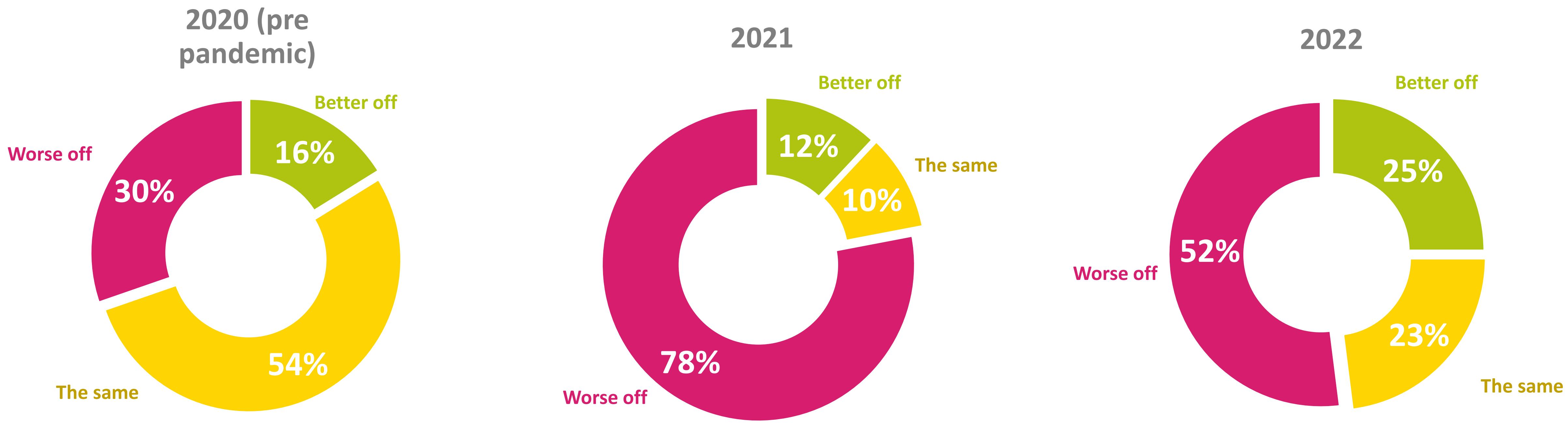
Concern about inflation and its impact on the economy is being noticed across the board.

Q.4b To what extent do you agree or disagree with the following …

This pessimism is reflected in our projections for the future

Base: Adults 16+ = 1,019

Do you feel the global economy will be better, worse or the same over the next 12 months?

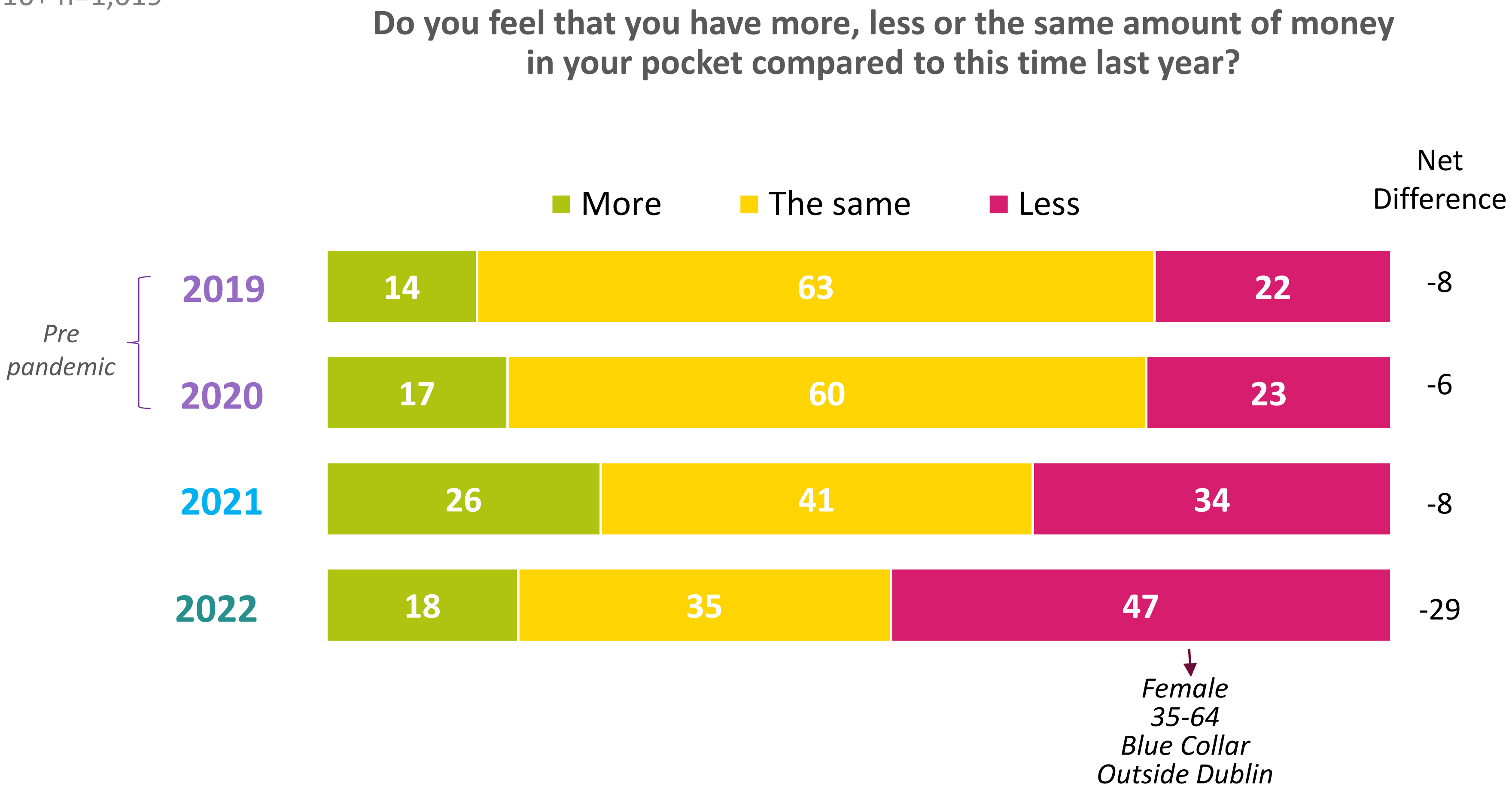


The war in Ukraine, coupled with rising inflation is likely to intensify the feeling that the global economy will worsen over the next 12 months.

Q.2 *Do you feel the global economy will be better, worse or the same over the next 12 months?*

Almost half the population feel they have less disposable income than last year

Base: All adults 16+ n=1,019



The figures are stark versus 2020 – with females, those aged 35-64 (family age cohorts), and the working class the most likely to claim to have less disposable income. Middle class Dubliners are less affected, with nearly 1 in 3 (30%) stating they actually have more disposable income.

Q.11 Do you feel that you have more, less or the same amount of money in your pockets (i.e. disposable income) compared to this time last year?
Q.13 Which best describes your household?

Early in the Covid crisis we hoped for a post-covid period of carefree celebration (like the roaring 20s).

Instead, it looks like we're in for protracted period of uncertainty and tough times economically.

It feels like we're inhabiting a world more anxiety ridden and unpredictable than it has seemed in recent memory. Rather than a blip in the timeline, the Covid **experience points to the inherent instability of the world we live in.**

Thought starters for brands …

- During the pandemic, we saw consumers turn to **trusted brands** as beacons of comfort in times of uncertainty. It's worth nothing these feelings haven't gone away and therefore this should still be a **priority** for brands that deliver in this space

- This period has awakened a greater interest in global news and affairs for many (though equally people have found it important to manage their exposure). Our sense of ourselves as global citizens, intrinsically connected with each other is very strong and there are opportunities to foster that further

- While the full economic implications of the period we're living in haven't quite hit us yet – we can all see those trains coming down the tracks. Anything brands can do to **help consumers manage day-to-day** expenses better will be welcomed. The age of the **hyper thrifty** consumer may soon be upon us.

Making up for lost time

Having said that, the experience of the pandemic has ignited a strong desire to ‘make up for lost time’

- 2 years out of our lives has been very significant, particularly for the young, the old, and anyone at transition points in life (young adults who are pre ‘settling down’, those looking for new relationships, the recently retired).

- This trend has been in evidence since the end of the last lockdown, manifesting itself in different ways.

    - Getting kids back into their activities was a huge focus of summer/autumn of 2021 for example.

    - We saw young adults flock back to the pubs/nightclubs during the brief boom in the autumn.

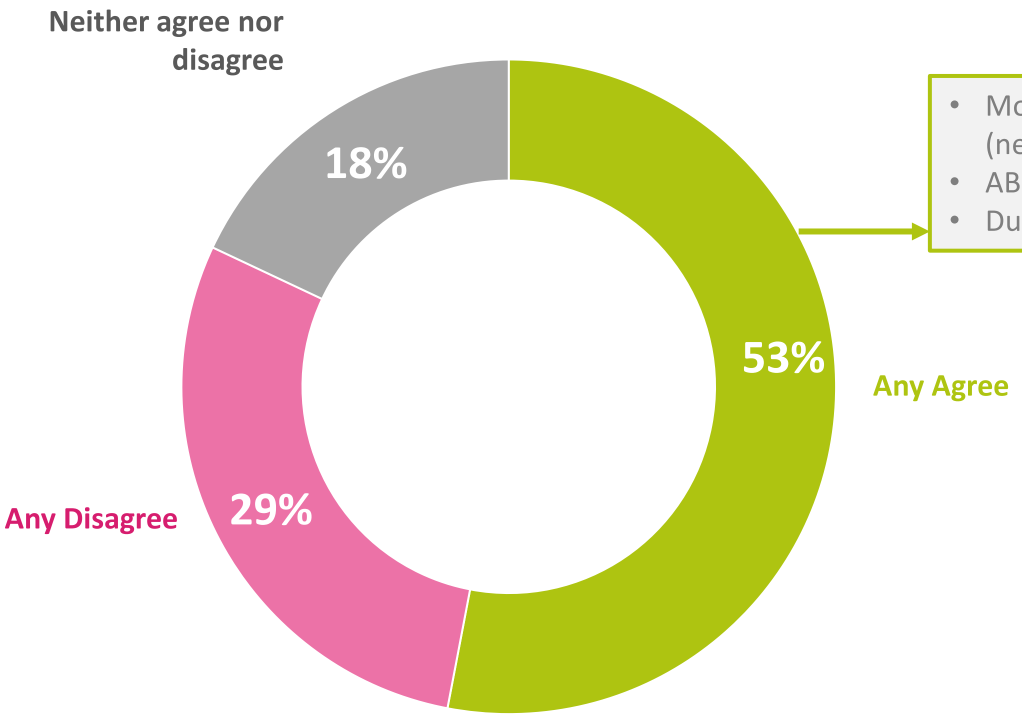
Although 2021 wasn't entirely spent under harsh restrictions, it's only now we're able to do the following things we've missed

All of these things are strongly on the agenda for 2022 – we want to enjoy our lives and do the things we love.

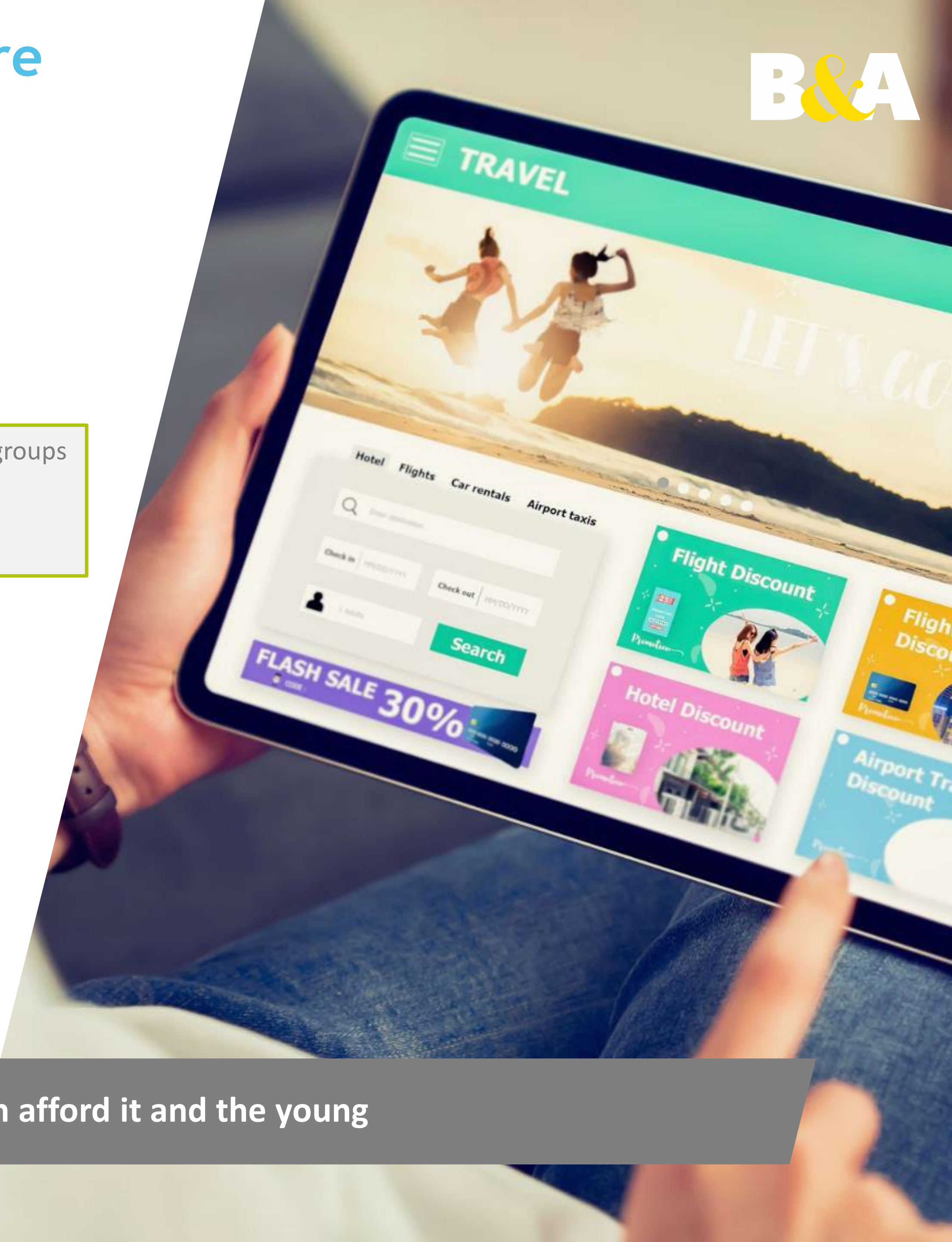
After two years of domestic tourism, the desire to get on a plane is high

Base: All adults 16+ N = 1019

I need a foreign holiday this year, and will be going on one…



- More 16-34 age groups (nearly 3 in 4!)
- ABC1 (82%)
- Dublin (66%)



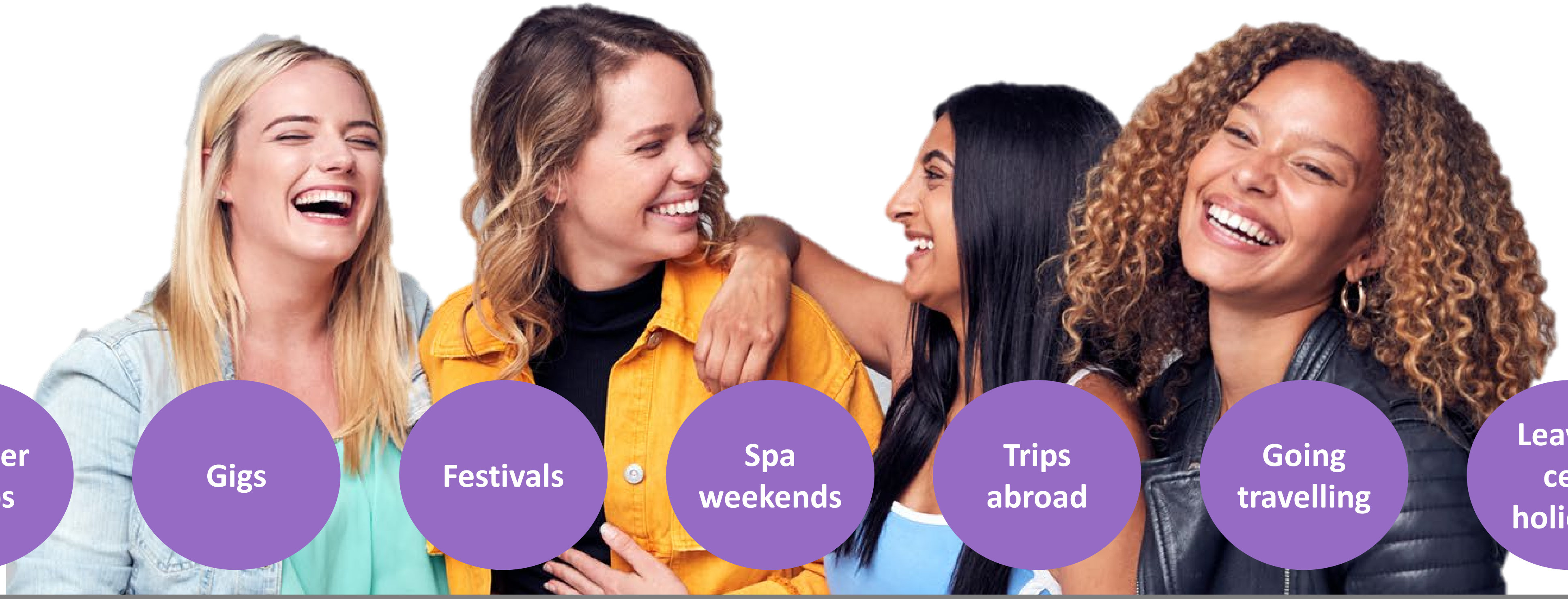
Very high percentages among those who can afford it and the young

Q.4a To what extent do you agree or disagree with the following ...

Assuming we don't hit any roadblocks, the summer of 2022 looks set to be a key period for 'making up lost time'

Particularly for young people

With all of the following booked in / planned for



- Summer camps
- Gigs
- Festivals
- Spa weekends
- Trips abroad
- Going travelling
- Leaving cert holidays

How all this pans out alongside the cost of living increases remains to be seen, but many of us feel that we need / deserve these things, so we're compartmentalising our anxieties and worrying about that later. Life is for living after all.

The autumn of 2022 then might be the point where things are challenging - there may be increased tension between the haves and have nots, increasing debt, consumers strongly cutting back, delaying important financial commitments like buying houses/cars.

Thought starters for brands …

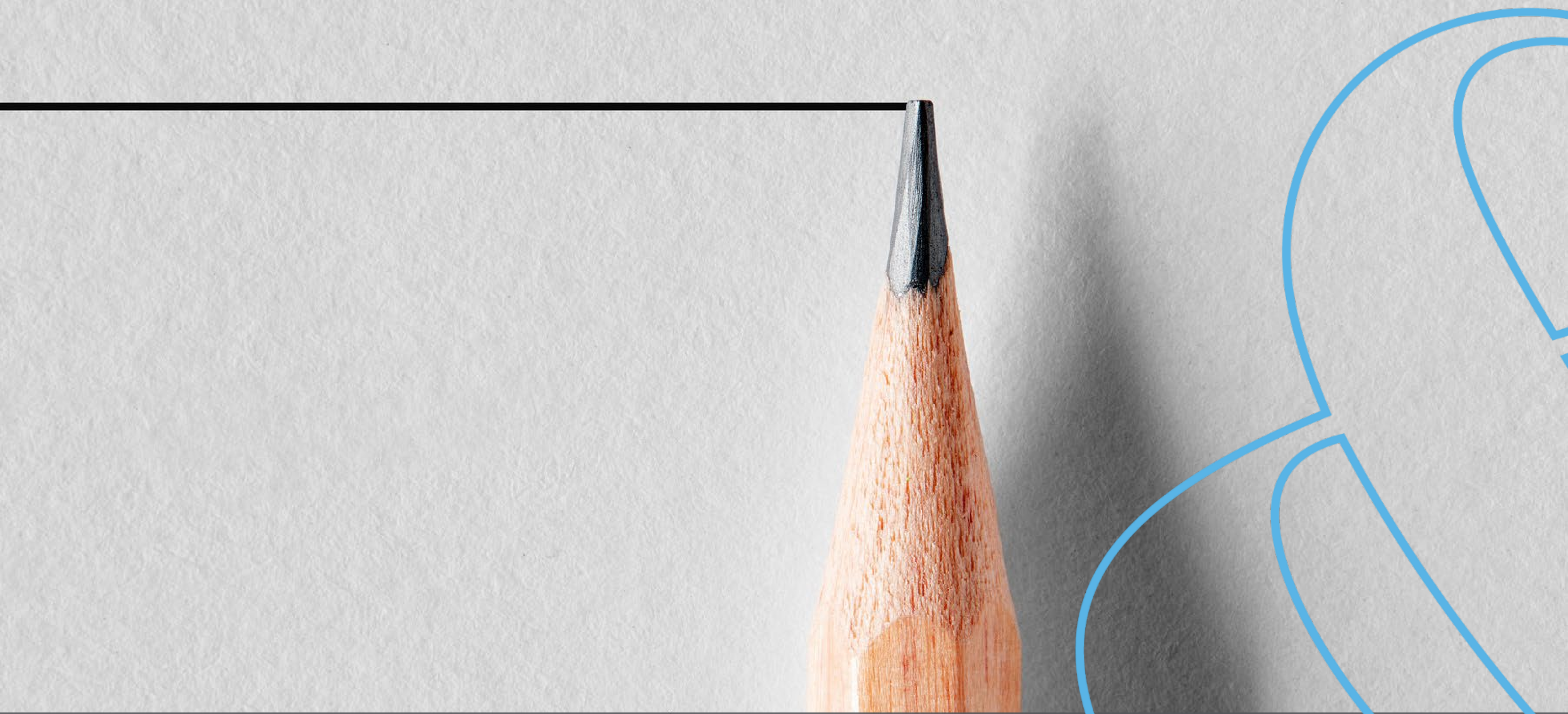
- The spirit of **life is for living** / carpe diem is already in evidence and should peak during the summer months, so there will be opportunities for brands to support and engage with these emotions.

- Young people in particular have a lot of living to do – great potential for brands.

- There is a huge emphasis on children and young people's learning and development at this time, real focus on what they might have missed and a need for energy / resources to catch them up.

- A major focus is on **communal experiences**, which covid curtailed and we're now engaging in, so **dialling up the experiential** is a good idea for most brands

- The autumn will be a good time for brands in a position to help consumers with budgeting and book balancing as the spoils of the summer will have to be paid for.



Societal stagnation & polarisation

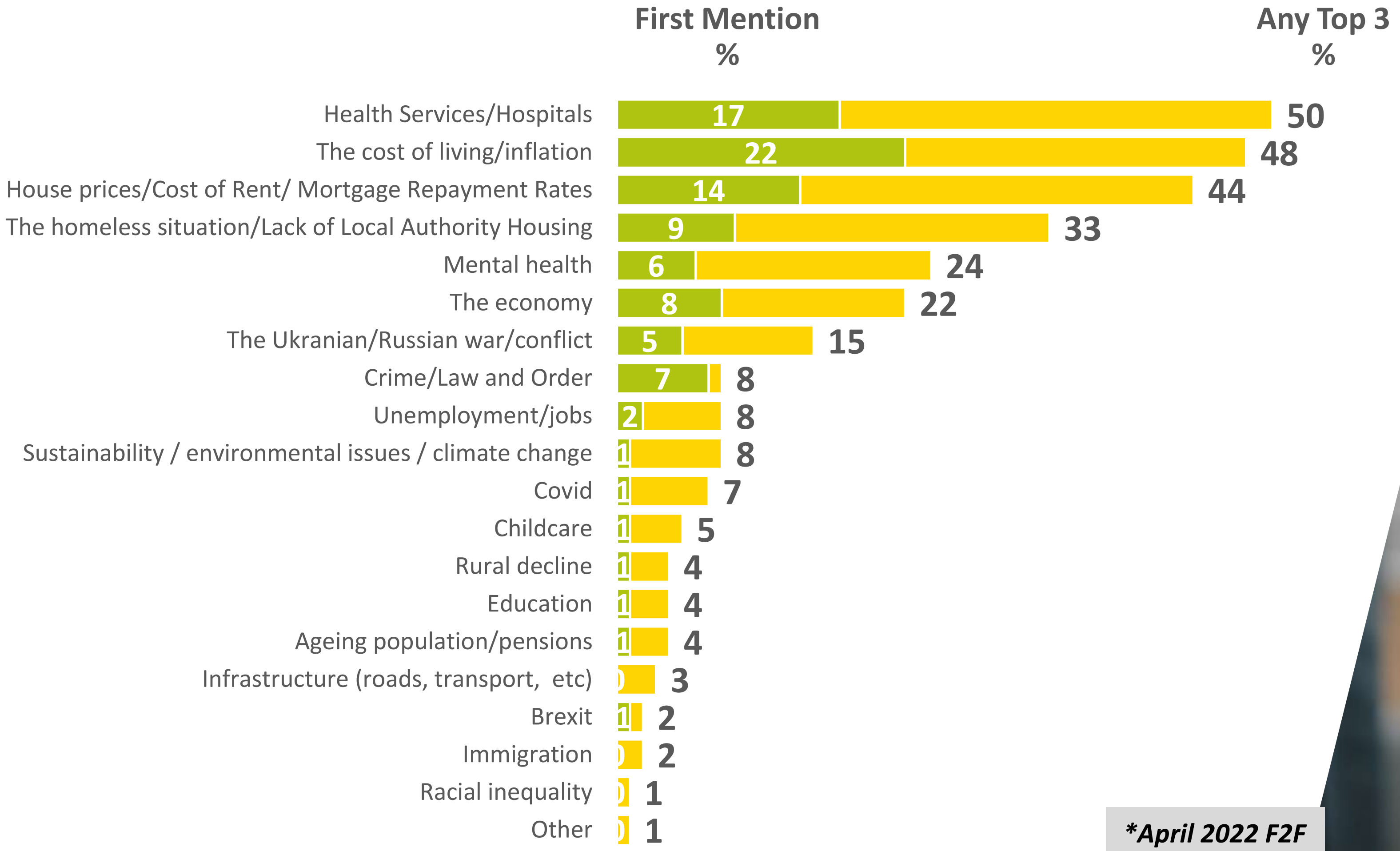
If we think back to early 2020 and the election, we had immediately pre-pandemic

- We saw a strong vote against the status quo and for change.
- Motivated in large part by the electorate's frustration with issues (like housing) and a sense that the period of economic growth hadn't resulted in better living standards for many.
- As the covid threat recedes and politics returns to a more business as usual approach, these issues are raising their heads once more.
- It's hard to see what's been done to tackle them.

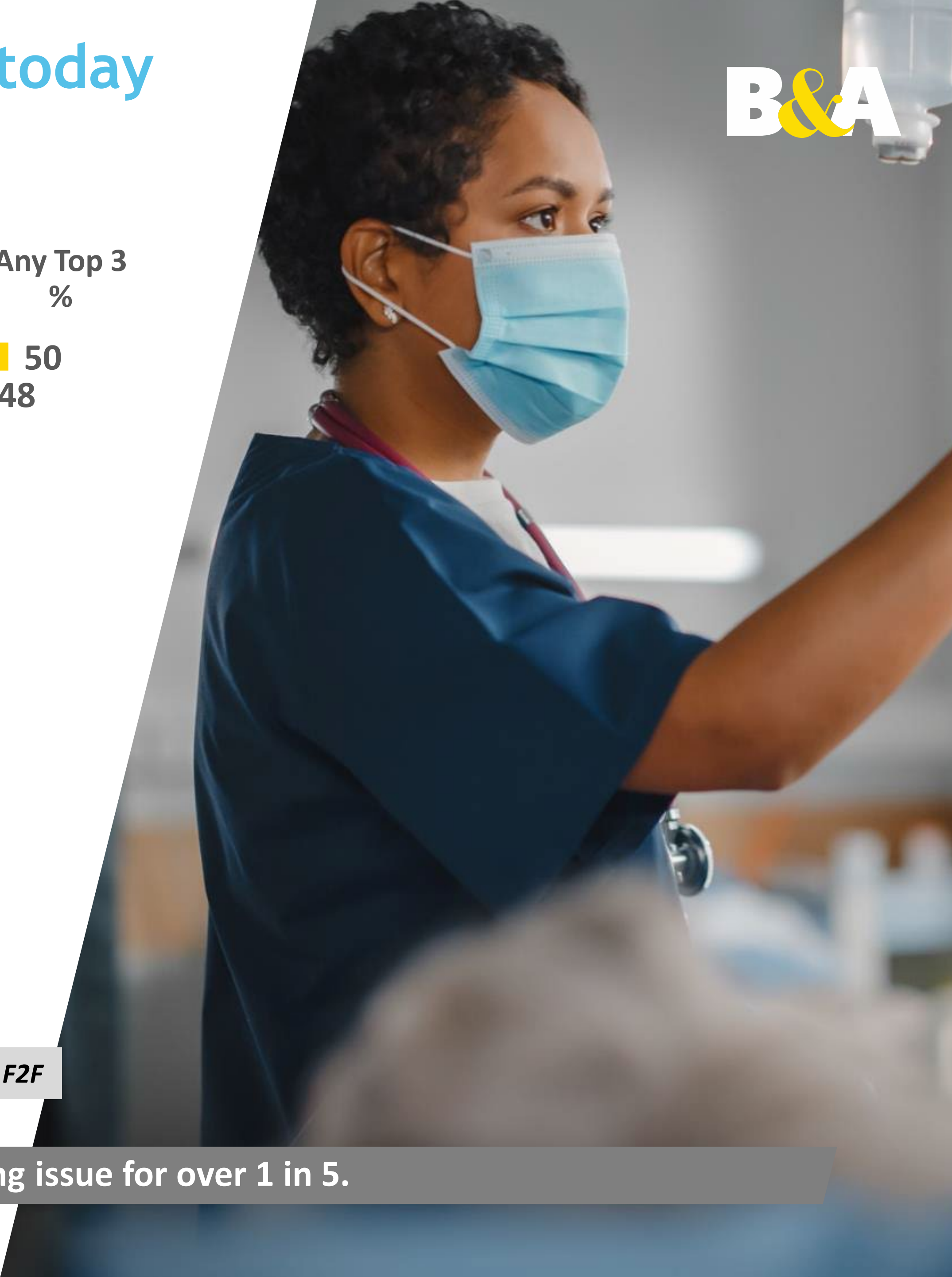
Now obviously, the pandemic has gotten in the way and has complicated the situation for health provision in particular, but there is significant frustration that government allowed the ball to be dropped on housing. We now have added the housing of refugees into the mix.

Top 3 most important issues facing Ireland today

Base: All adults 18+ N = 957



*April 2022 F2F



The cost of living is the most concerning issue for over 1 in 5.

Q.9aii Which of the following do you feel are the 3 most important issues facing Ireland today?

Top 3 most important issues facing Ireland today

Base: All adults 18+ N = 957

Significantly higher than total
Significantly lower than total

Base : All Irish Voters	Total	Gender		Age			Social Class			Region					Area	
		Male	Female	-34	35-54	55+	ABC1	C2DE	F	Dublin	Lein-ster	Mun-ster	Conn/ Ulster	Outside Dublin	Urban	Rural
Base:	*957*	*463*	*494*	*257*	*327*	*373*	*478*	*442*	*37*	*259*	*276*	*252*	*170*	*698*	*625*	*332*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Health Services/Hospitals	50	49	52	33	54	59	52	49	48	44	48	55	55	53	46	58
The cost of living/inflation	48	46	51	52	49	46	41	53	68	38	48	55	56	52	43	58
House prices/Cost of Rent/ Mortgage Repayment Rates	44	46	42	55	44	36	49	42	29	58	37	38	43	39	47	39
The homeless situation/Lack of Local Authority Housing	33	32	34	32	31	35	33	35	20	31	33	36	30	33	36	26
Mental health	24	19	30	28	24	22	21	28	23	25	27	20	27	24	25	24
The economy	22	24	20	21	20	24	24	20	17	22	29	20	13	22	24	17
The Ukranian/Russian war/conflict	15	15	15	13	18	15	16	15	19	15	17	19	8	16	14	18
Crime/Law and Order	8	9	7	5	8	9	8	6	10	11	8	5	6	6	8	7
Unemployment/jobs	8	10	6	11	6	8	8	8	14	8	6	11	7	8	9	6
Sustainability/environmental issues/climate change	8	11	6	10	8	7	11	6	3	17	6	4	3	5	10	5
Covid	7	6	7	9	6	5	8	5	3	7	5	6	8	6	6	7
Childcare	5	4	5	4	6	4	5	5	2	3	6	5	5	5	5	5
Rural decline	4	4	4	4	3	6	2	4	21	1	7	6	3	6	2	8
Education	4	5	4	8	4	2	5	3	11	3	5	4	6	5	5	4
Ageing population/pensions	4	5	3	1	2	8	2	6	5	1	6	3	8	5	3	5
Infrastructure (roads, transport, etc)	3	3	3	2	4	2	4	3	-	5	2	1	5	3	3	3
Brexit	2	3	2	4	2	1	3	1	3	3	2	1	2	2	3	1
Immigration	2	2	3	3	2	2	2	3	-	2	1	2	5	3	2	3
Racial inequality	1	1	1	-	1	2	1	1	-	1	-	2	1	1	1	1
Other	1	2	1	2	1	1	1	2	-	1	2	1	1	1	1	1
- ANY ECONOMY / JOBS	**28**	**31**	**25**	**31**	**25**	**28**	**31**	**25**	**28**	**28**	**33**	**27**	**20**	**28**	**32**	**21**
- ANY HEALTH / MENTAL HEALTH	**67**	**63**	**70**	**54**	**71**	**72**	**65**	**68**	**71**	**59**	**67**	**68**	**75**	**70**	**62**	**75**
- ANY HOUSING RELATED	**65**	**65**	**66**	**70**	**66**	**61**	**69**	**64**	**46**	**73**	**62**	**64**	**61**	**62**	**69**	**58**

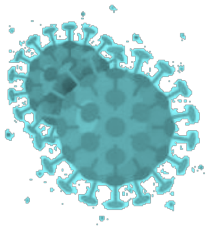
Mental Health particularly stands out as an issue for women, with the cost of living also more prominent female and younger.

Q.9aii Which of the following do you feel are the 3 most important issues facing Ireland today?

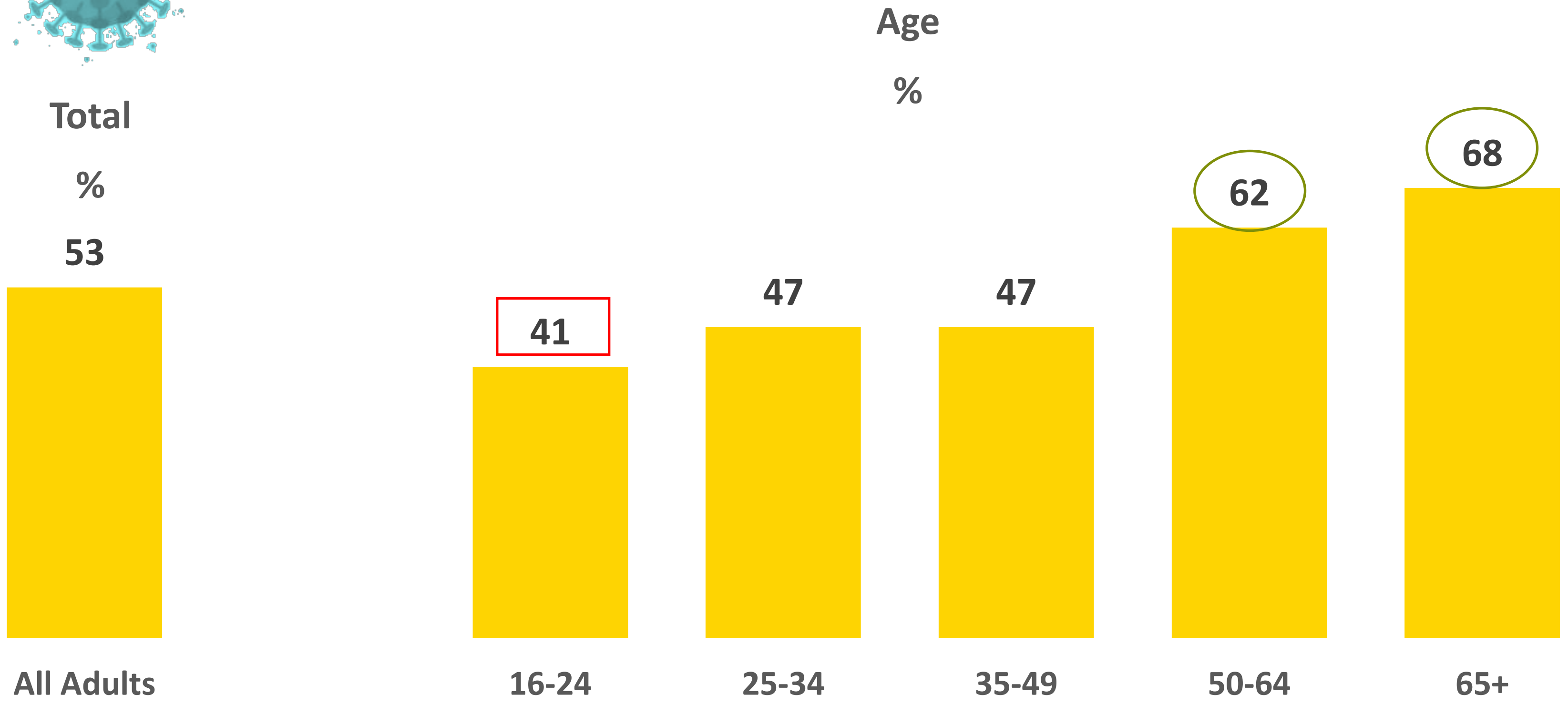
***F2F**

Overall, reflections on the government's handling of the pandemic are relatively good

Base: Adults 16+ = 1,019



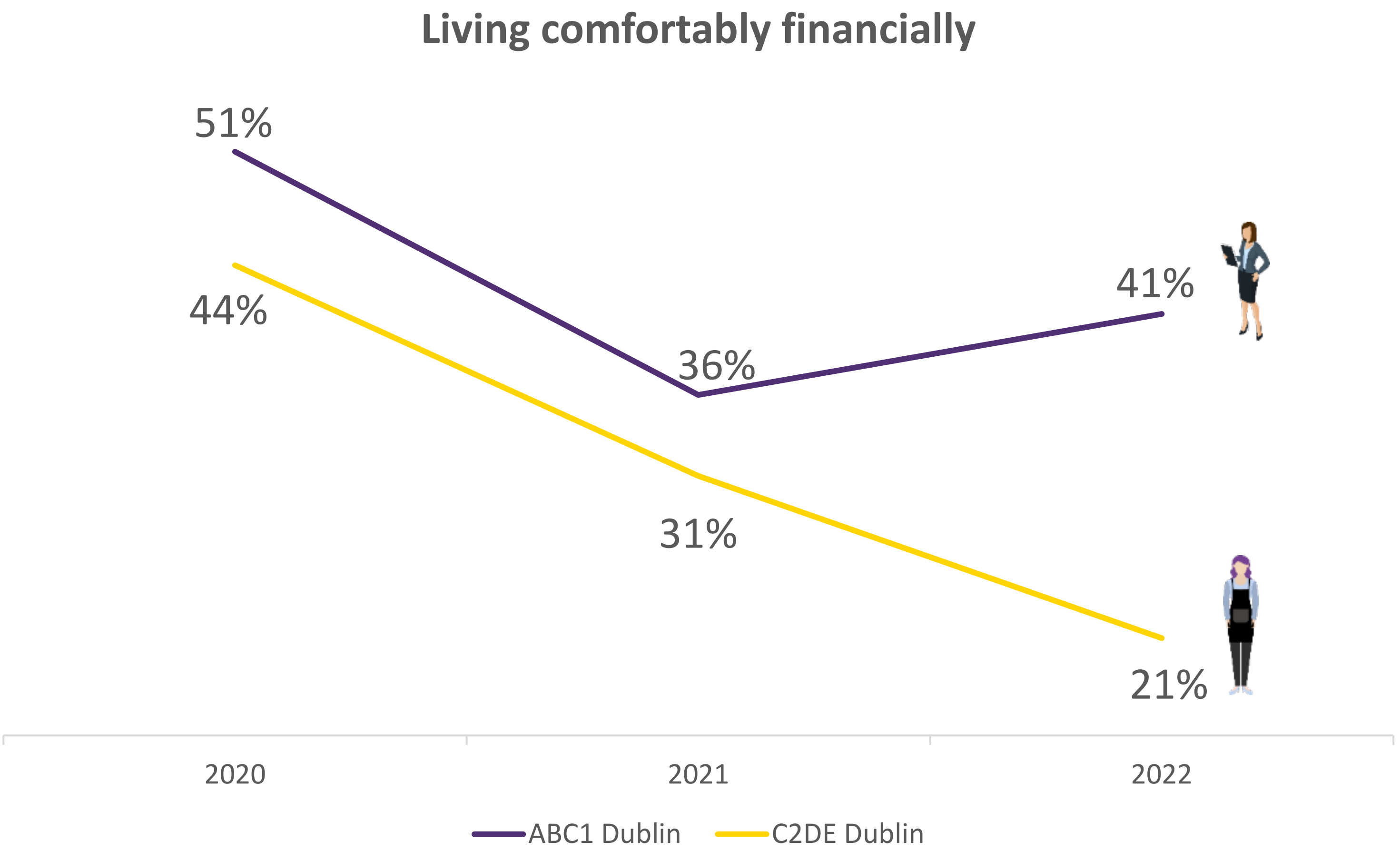
"I think that the government has done a good job in its handling of the Covid-19 pandemic….."



Though note the stark differences across age!

However, the pandemic has shone a stark light on the problems that were already facing Irish society

The gap between the middle and working class on financial security has widened since the onset of the pandemic – with middle classes now twice as likely to be living comfortably financially.

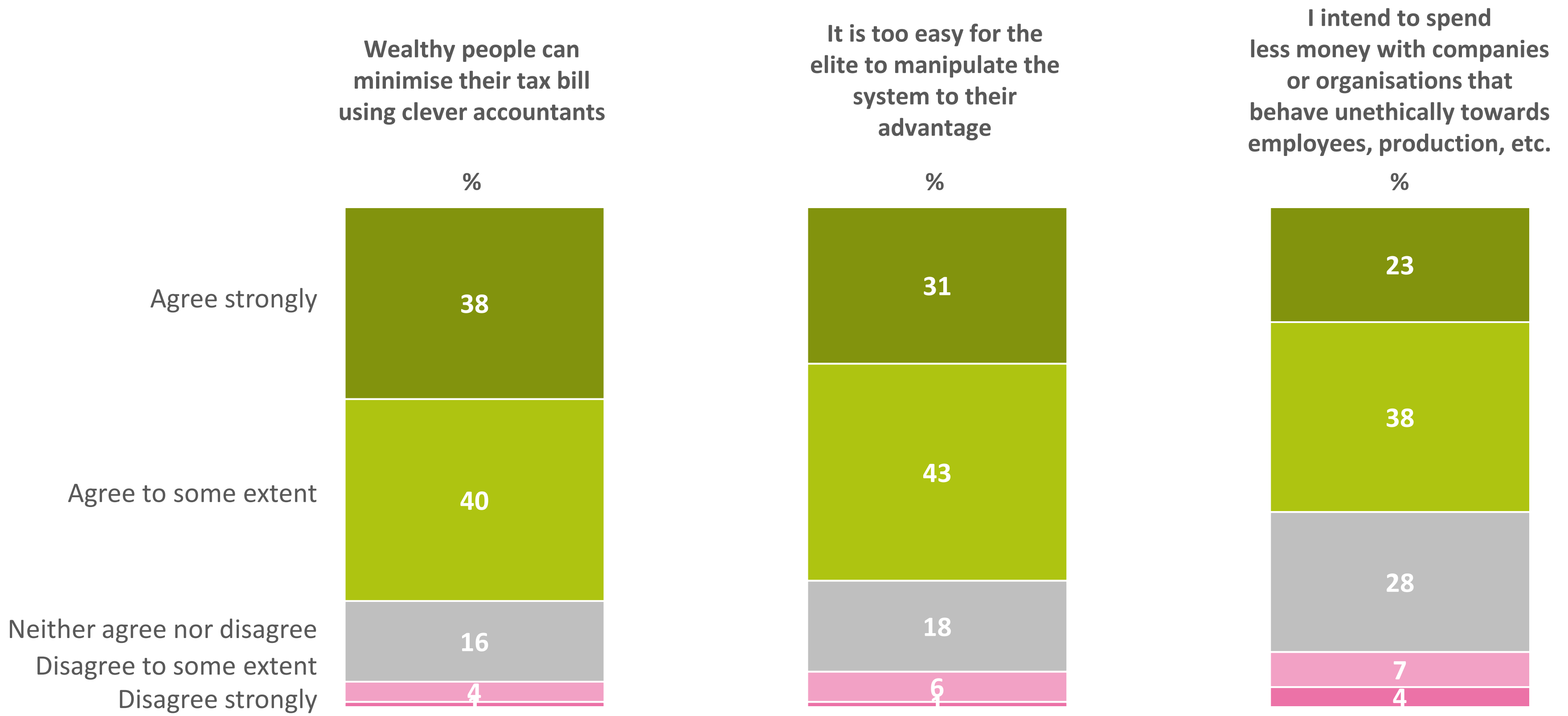


This gap is likely to extend into the medium term with increased pressure on household expenditure during the current inflationary period.

 Q.3 Which best describes your household?

A wide acknowledgement of the elite

Base: All adults 16+: 1,005



Any Agree	78	75	62
Any Disagree	6	7	11
Mean	4.10	3.98	3.71

*F2F

A clear distrust of the 'system', with many agreeing that the powerful can easily manipulate it and minimize tax bills, with 3 in 5 intending to spend less with unethical/unsustainable companies.

Q.2a/2b To what extent you agree or disagree ...

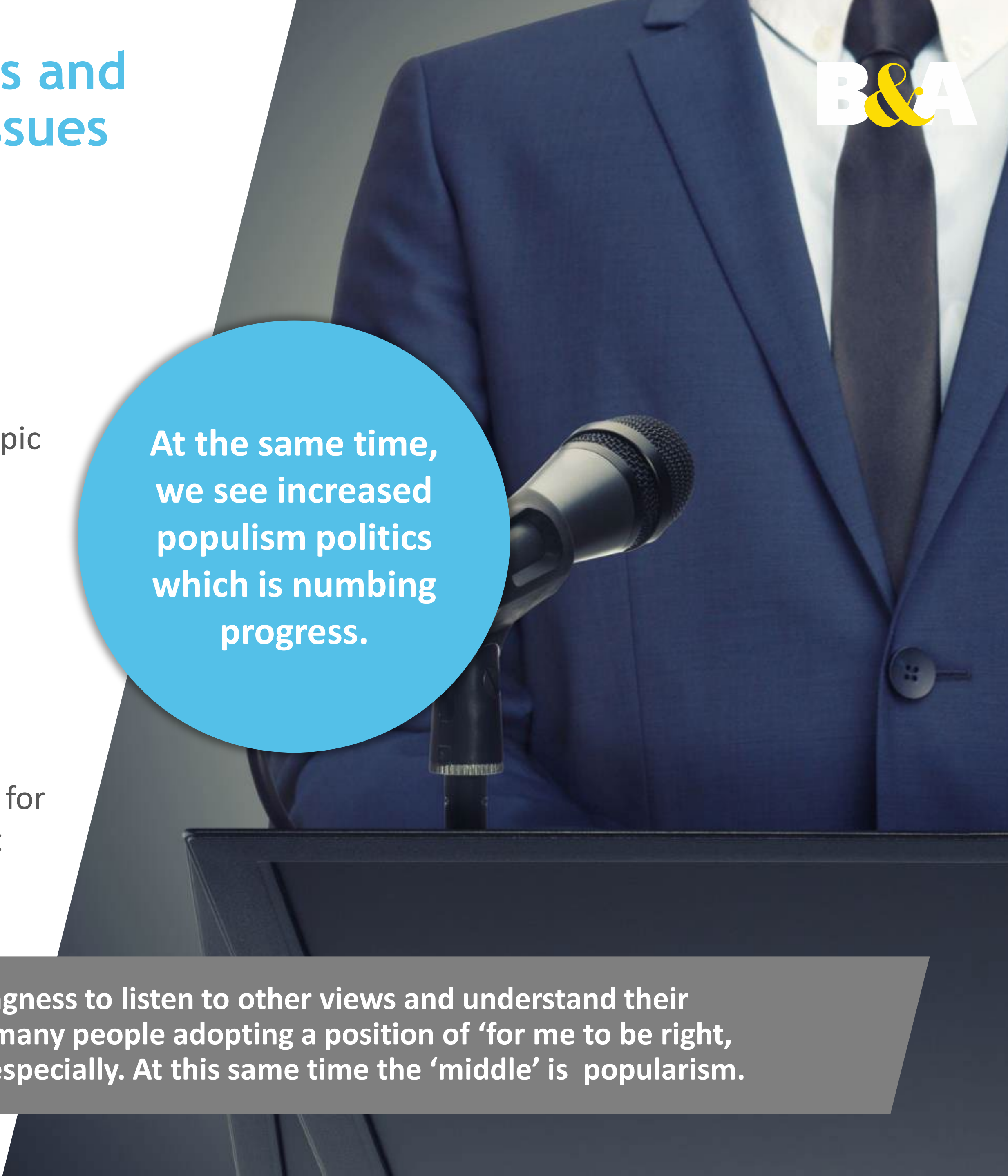
The young and the poor are becoming increasingly disenfranchised in Irish society

- While there seems little opacity or accountability for government spending, most notable on major projects and high-ranking civil service posts.
- There's been so little progress made on issues like housing that it's getting hard to believe, for many, that the current government even see it as a priority.
- While it's a laudable aim for government to 'pull every lever' to help house Ukrainian refugees, there's understandable frustration that they've never done this for their own citizens. Again, indicating that the coalition simply don't care about young Irish people's need for secure, affordable and quality housing.

Increasingly polarisation of people's views and populism politics on social and political issues - A perfect storm!

- At the broadest level we see this in the polarization of those who lean more left versus right, resulting in more engagement with extreme positions on either side (QAnon and similar)
- But we see the same pattern played out across a variety of hot topic issues across the last few years
    - Climate change
    - Vaccination status
    - Mask mandates
    - Gender identification

This increasing division feels like a particularly problematic direction for a country like Ireland, which has historically not had strong left/right division politically

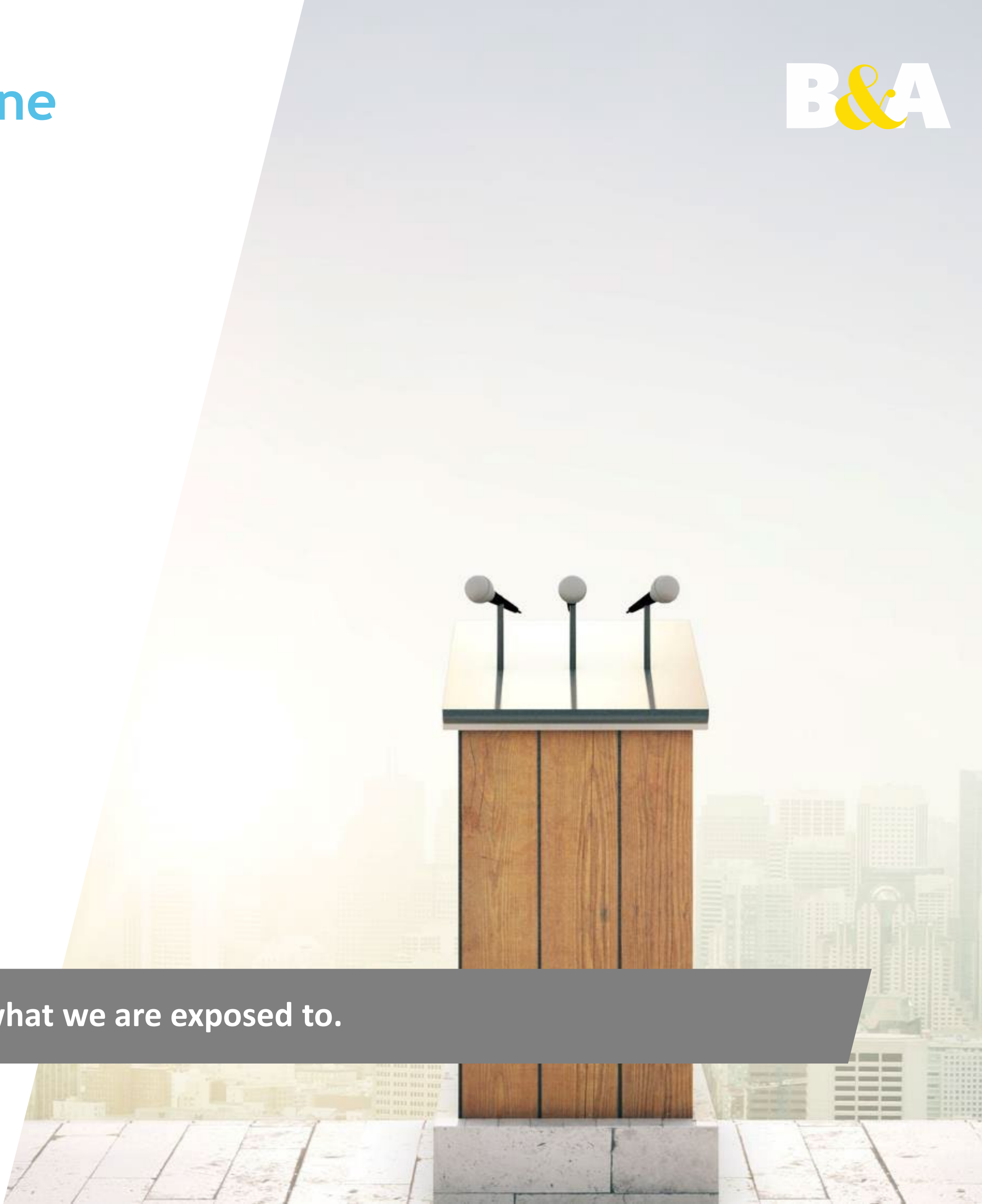


At the same time, we see increased populism politics which is numbing progress.

We see less and less middle ground on these issues or willingness to listen to other views and understand their concerns. The appetite for genuine debate has declined, with many people adopting a position of 'for me to be right, you must be wrong'. It is in its infancy and is fueled by Twitter especially. At this same time the 'middle' is popularism.

It’s easy to blame social media for the decline in debate

- To a very large extent that is correct, as it creates these echo chambers
- Complex algorithms only present us with material that they know we will engage with
- Twitter is a particularly problematic media for engaging with any complex, nuanced or empathetic debate
- The demise of print media is also playing a role here as it enabled readers to happen across viewpoints that they may not share, but they read all the same
- The ‘editorial view’ of many of our major media outlets is often quite overt



But equally, we’re self selecting what we are exposed to.

Thought starters for brands

- There was great appreciation for brands that went the extra mile during the covid crisis, but it's worth remembering that the many of the younger / poorer members of society are still really struggling. These are longer term, more chronic issues, but **brands in a position to support more marginalised groups will be appreciated for doing so.**
- As during covid, **luxury** brands will have to navigate this road carefully as delivering to the 'have's' in Irish society is **best done subtly** for the moment.
- Housing will continue to be high on the agenda for young people in Ireland. It's the problem that no one seems committed to actually solving (or has the answer).
- Any brands with interest in social cohesion should be looking for ways they can **connect different groups** in society and foster commonalities between them, as this is sorely lacking for today's consumers.
  - Drawing connections through shared interests, shared spaces, priorities (think about some of the common views held by the youngest and the oldest on climate change for example).
- Encouraging respectful debate and sharing of views is something that all brands can try to be a part of. It's important to always be vigilant about social media's propensity to make the debate confrontational and avoid the pitfalls of twitter in particular.
- Equally, our experience over the last few years has shown us how influential social media influencers and tribes are in informing consumer decision making. Expert advice is obviously crucial, but we are also **strongly informed** by the **views of people who we feel understand and 'get' us**. Our connections on social media may not actually deliver this, it could well be an illusion, but it is a powerful one all the same.

Self discovery and direction

As we create the post-covid 'normality' we don't want to return to our 2019 lives entirely

The pandemic experience has taught us a lot about ourselves

- What's really important to us.
- What we most need to thrive.
- The parts of our lives that weren't adding any value.
- We surprised ourselves with strength we were able to muster, the ingenuity we displayed in adapting to different ways of life.

It allowed us to see that there were other ways of doing things

- **More flexibility** with working patterns for example.
- The value of **spending more time** outdoors, enjoying simple pleasures.
- The realization that we **don't need to pack our lives** quite so full with activities, social events.

It made us more self reliant

- Many of us **built skills** during the lockdown periods (cooking, baking, DIY, hiking, running, sea swimming, yoga).
- We became **less dependent** on others for our leisure time and better at entertaining ourselves.

These lessons were very hard won. It would be a great shame to waste them

There are 'pandemic benefits' that we're keen to hold on to, even as the pressure of returning to normal intensifies

Some **working** from home/flexibility in our working hours.

New pastimes and spending time in the great outdoors.

Creating **experiences at home** (fancy meals/family movie nights) rather than spending a fortune on going out

Spending time with **people** we actually want to be with, rather than feel we ought to.

A **slower pace** of life rather than filling up diaries, less dashing about.

We want to apply the learnings and the fight to achieve this better equilibrium continues and it is a fight, as we get sucked back in quickly.

Thought starters for brands

- The embracing of the **outdoors** has been a huge by product of the pandemic and one that people are keen to continue. The appetite to make outdoor public spaces more liveable and genuinely useful continues to be high and anything brands can do to support this would be welcomed

- **Flexibility and balance** are some of the key things people are seeking right now – how can we make all the different aspects of our lives work best for us?

- It feels like more work and thought needs to be put into this, so what can we do to keep momentum up on this discussion – there's a danger that we let this drop as we get back to normal

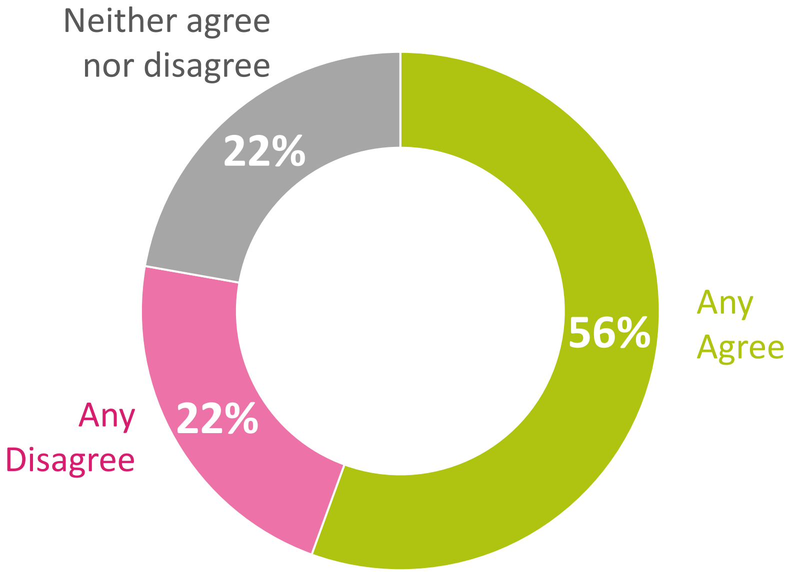
- Let's not forget what we were capable of pulling off when it mattered most. Looking back, the nimbleness, resourcefulness, creativity that some of our industries showed to keep going during the pandemic (hospitality stands out) went beyond anyone's expectations. We should be thinking of how we **foster this sense of innovation** in less fraught times.

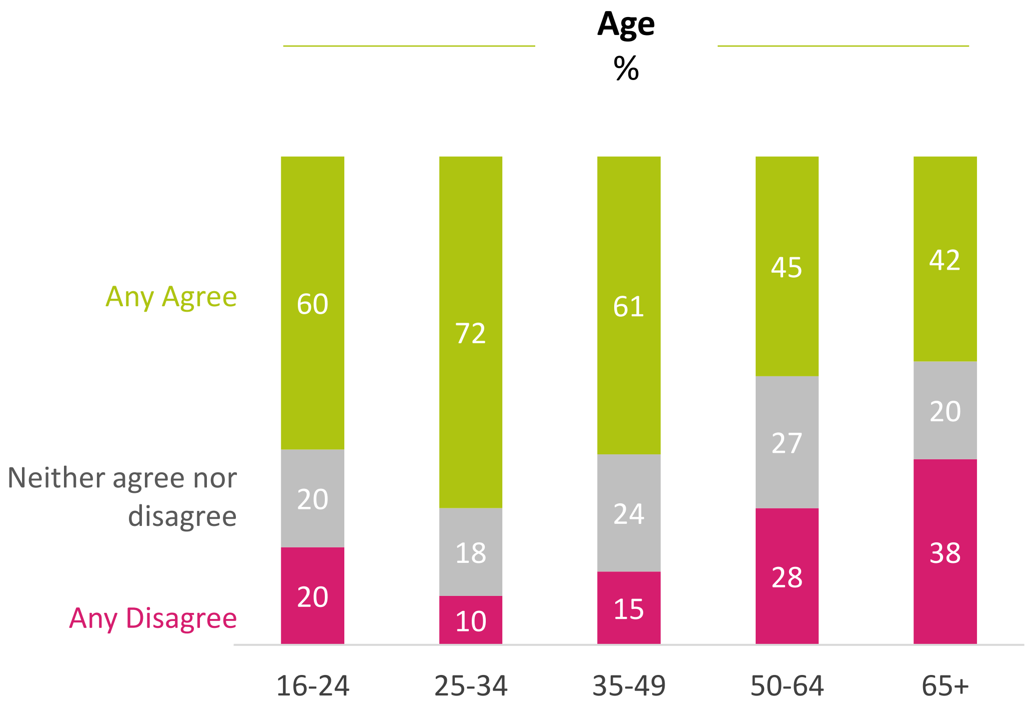
The online ‘boom’!

The online boom! - Increasingly our retail hit is being delivered by online channels

Base: All adults 16+ N = 1019

The number of things that I buy online has increased in the past year…





The pandemic has greatly accelerated buying online (Across all age groups) – and in fact has become the default channel for many. The pandemic enabled people to overcome barriers to online that they might not have done otherwise.

Q.6 To what extent do you agree or disagree with the following statements?

The pandemic enabled many people to overcome barriers to online that they might not have done otherwise

- Long periods where non-essential retail wasn't available encouraged consumers to try shopping online, even if it hadn't appealed previously
- During that time they figured out things like …
  - ❖ How best to handle returns policies
  - ❖ How to gauge sizing and/or which sites work for them from a sizing point of view
  - ❖ How to get a better handle on materials / look and feel in an online purchase
- All of which were key barriers prior to the pandemic.

A unique intervention that changed habits permanently. However, many older generations are still not online – see *B&A TechScape* report.

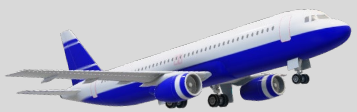
Consumers are embracing online for some product categories

*B&A TechScape

Base: All adults 16+ N = 1000

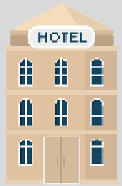
Buy products or services online nowadays from any of the following categories:

Flights



62%

Hotel bookings



59%

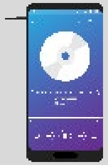
Clothes/shoes

57%

Electric goods
(including mobile phones)

33%

Music/film downloads/CD/ DVDs/TV shows

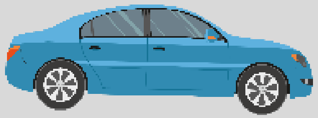


25%

Magazine/Books

25%

Car hire



24%

Computer games

21%

Groceries

15%

Pharm drugs/ medicines

9%

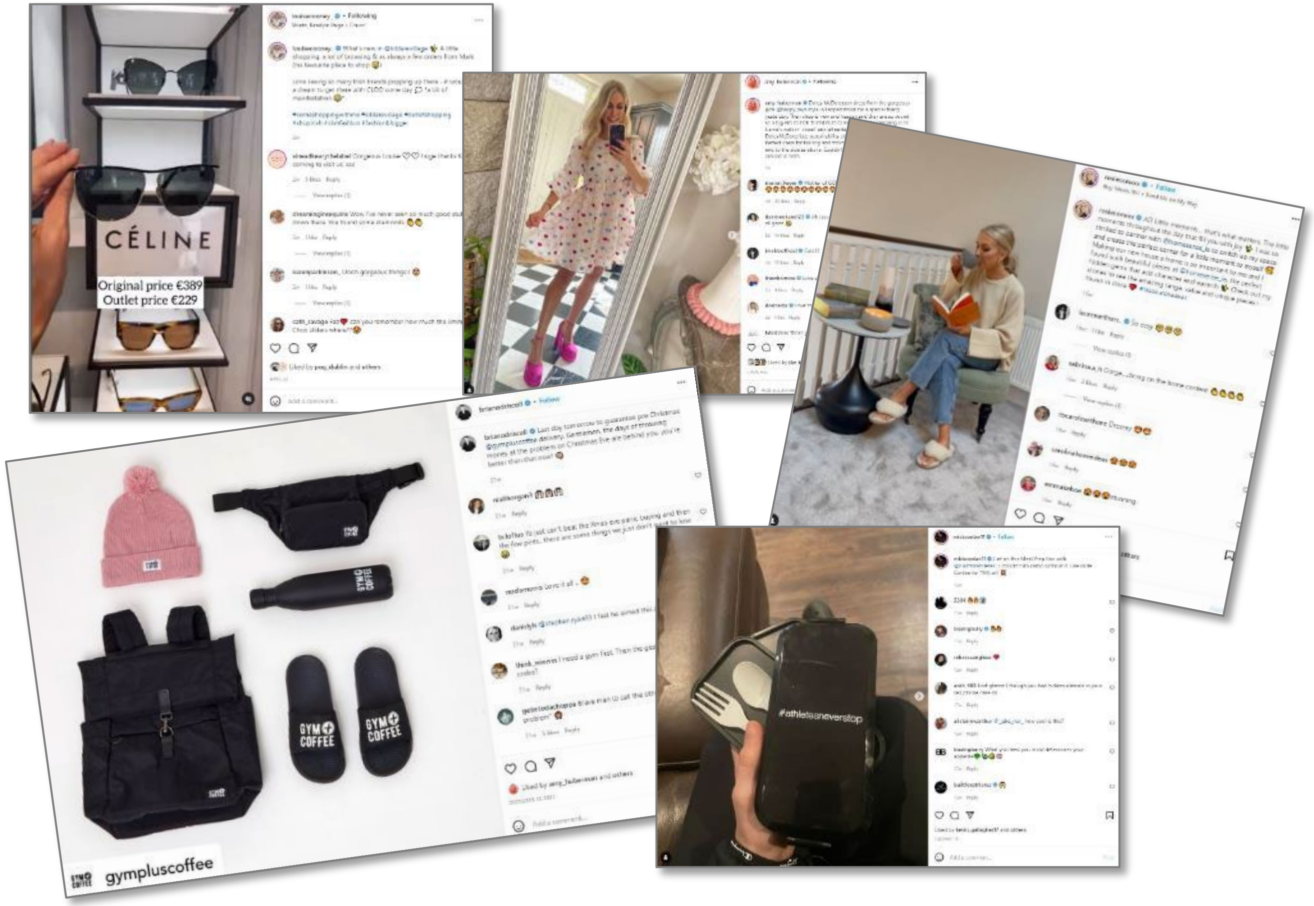
BUY

Some categories are further along in online development than others. However, even less obvious categories are starting to gain more traction online.

Q.10 Do you buy products or services online nowadays from any of the following categories?

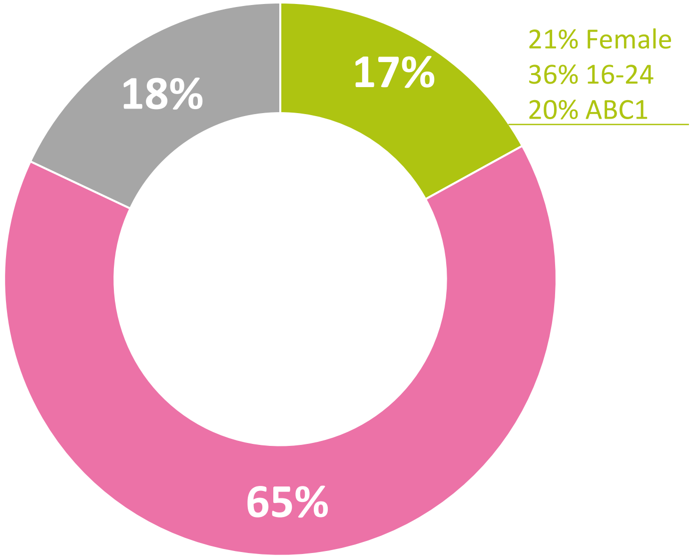
While online can feel like a very functional experience compared to in-store, connection and integration with social media is changing this

Instagram Influencers playing an important role in providing inspiration and alerting us to what's out there, something we used to rely on in-store to do



Role of social media

When shopping online, I get most of my ideas of what to buy from social media (e.g. Instagram, TikTok, Facebook)…



Q.6 To what extent do you agree or disagree with the following statements?

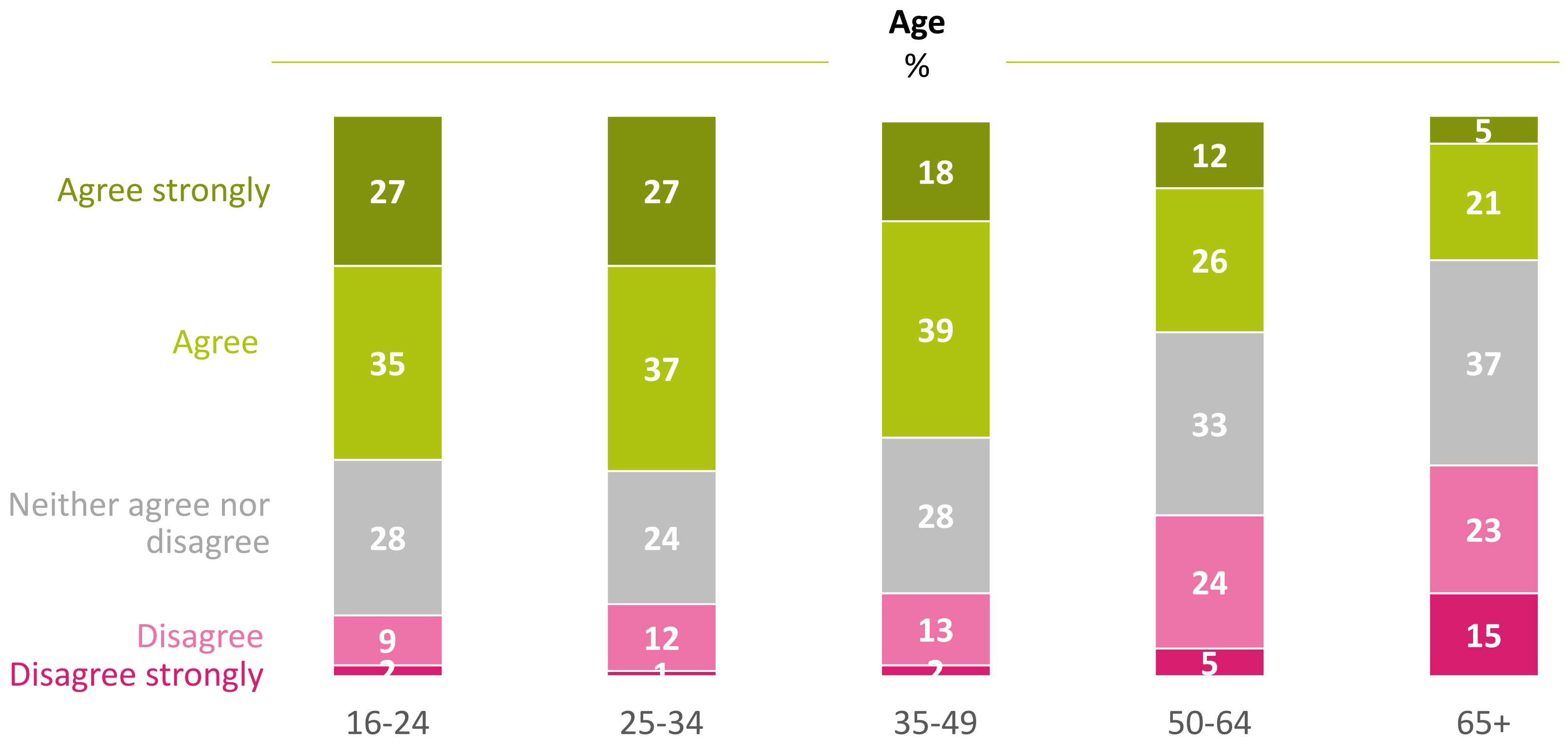
That's not to say in-store doesn't have its place, but it now must work hard to overcome the advantages online has for consumers

- Easy to search and compare prices
- No queues
- No travel
- Excellent availability of products
- Can be done from bed/in a work meeting

However, there is still a tech divide, with older consumers not finding it as easy to buy products online

Base: All adults 16+ N = 1019

Buying products online is much easier compared to going in store



I would rather shop online instead of physically going into a retail store

41%
under 44 years of age

14%
over 45 years of age

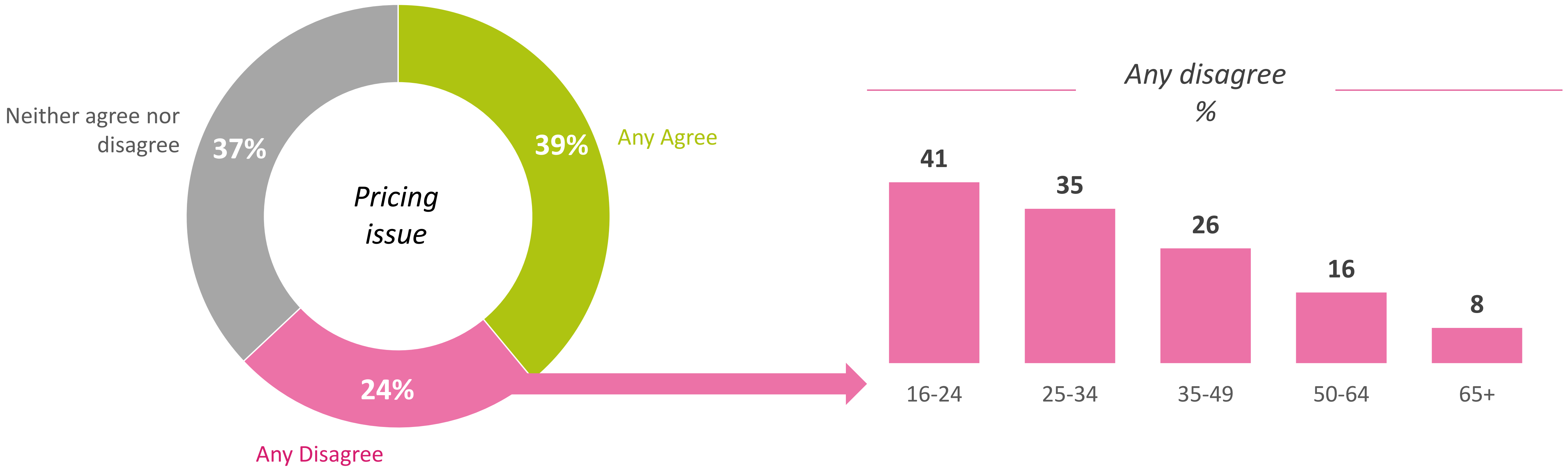
Those over 50 are less likely to agree that buying online is 'easier' that going in store.

Q.6 To what extent do you agree or disagree with the following statements?

With younger age groups feeling that they get just as much good deals online compared to in store

Base: All adults 16+ N = 1019

I think you get better bargains physically in store compared to online…



A myth dispelled - A perceptual barrier for shopping online for many older shoppers in particular – often driving the need to go in store to get the best value.

Q.6 To what extent do you agree or disagree with the following statements?

There are still many reasons why we would want to go in-store (across all age groups)

As a leisure activity

Shopping still delivers as a fun way to spend time for many, though there is less patience for things like queuing, crowded stores, poor merchandising.

To people watch

We realised during the pandemic just how much other people add to our shopping experiences – watching them for fashion tips, following their lead in terms of navigating the store.

To treasure seek/engage with products in real life

Even the very best online experiences can't match the total sensorial experience of seeing, feeling, engaging with things in reality.

The onus will be on in-store offerings to deliver on these higher-level benefits.

Many desire a more tactile or human experience in many categories

Do you prefer to buy the following products in store or online?

Tactile — **In store** — **Human**

The need for further inspection

The need for trust and/or connection

Grocery

90%

Furniture

81%

Kitchenware

78%

Cars

87%

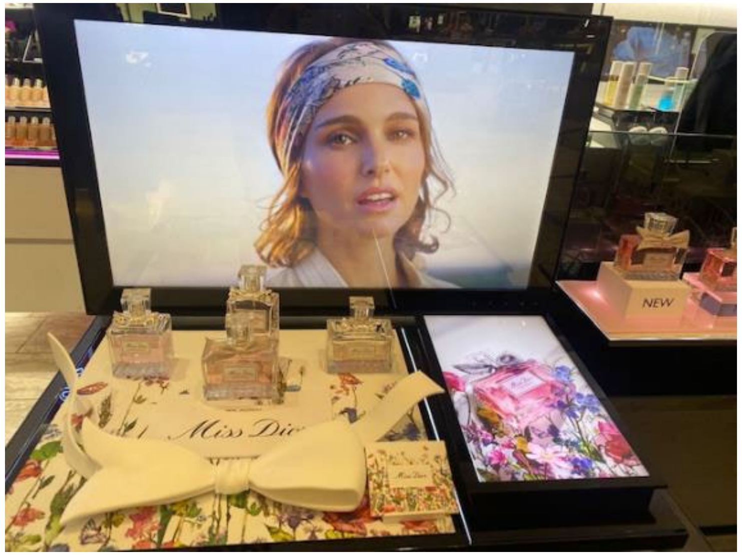
Pharmaceuticals/ medicine

86%

The tactile experience of going into the shops is still highly relevant.

Q5a Do you prefer to buy the following products in store or online?

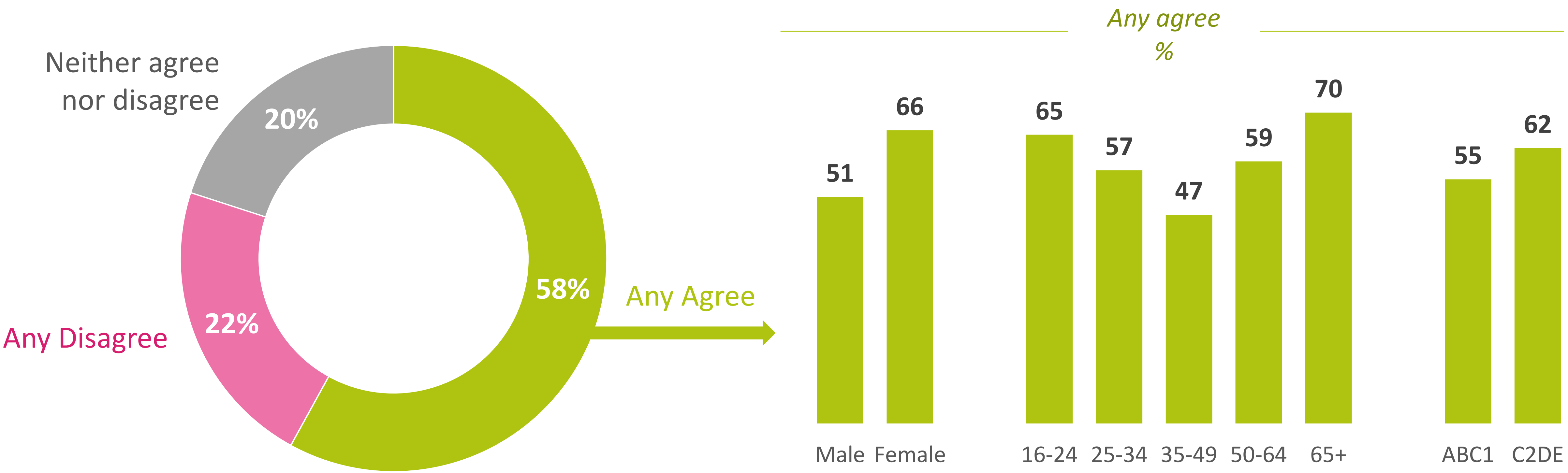
The in-store shopping experiences that survive will be those that deliver as a highly experiential, product focused and inspiring place to be



Shopping in person also delivers a social benefit

Base: All adults 16+ N = 1019

I enjoy the whole process of browsing shops in person. For me it is a leisure activity in itself…



Despite the increasing numbers of people shopping online, the social aspect of shopping in store is still a major draw for many.
Despite younger age groups openness for shopping online, going to the shops is still seen as an enjoyable leisure activity.

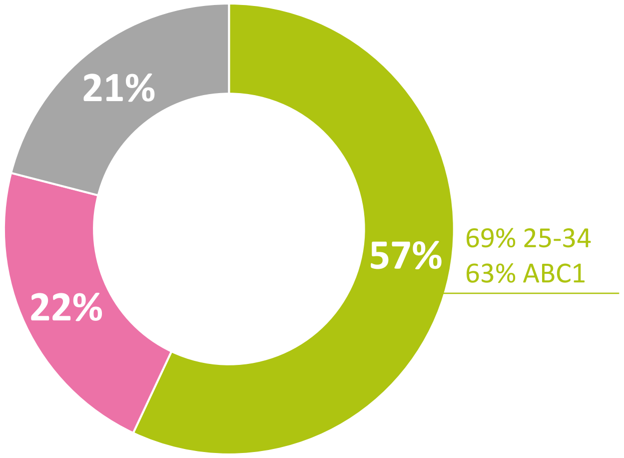
Q.6 To what extent do you agree or disagree with the following statements?

A more informed (and often prepared) consumer in emerging

Base: All adults 16+ N = 1019

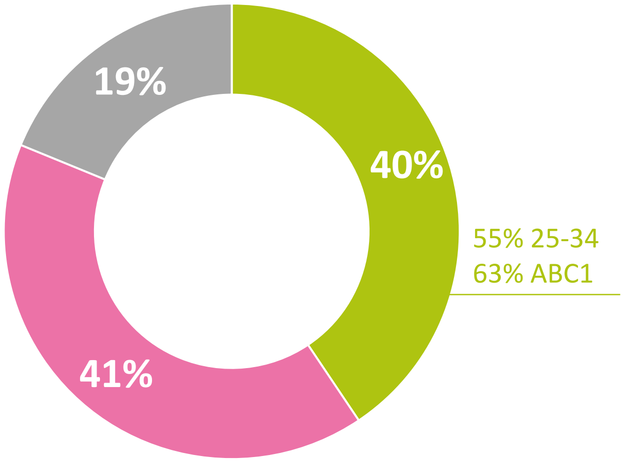
Prior research

When I go into a retail store to buy items, I tend to research them online first…



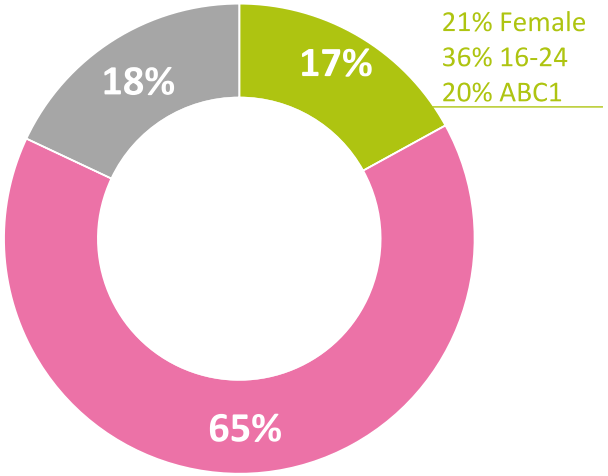
Mobile first

When browsing for items online I prefer to use my phone instead of a laptop/PC…



Role of social media

When shopping online, I get most of my ideas of what to buy from social media (e.g. Instagram, TikTok, Facebook)…



Consumers are increasingly looking to triangulate information before making a decision – seeking out reviews of products before buying them in store. Social media is increasingly integrating itself with online shopping. In-store is inr

Q.6 To what extent do you agree or disagree with the following statements?

Thought starters for brands

- It’s never been more important to have a great digital offering, but important to consider how delivering a good consumer experience in terms of **website** (great usability, navigation, clear info) can be **supplemented by more inspirational and engaging content on social media.**

- **In-store** is still very important, particularly if you are targeting older customers or within specific categories (and also social youth!). The stakes have been raised here also and delivering a stellar experience is now closer to a **hygiene** factor than a notable advantage.

- **Customer journeys** are becoming more complex, more informed and more interesting. **How much do you know** about how your consumer is engaging with your brand? Getting a detailed understanding here should be your most important starting point to develop your strategy (talk to us at B&A!).

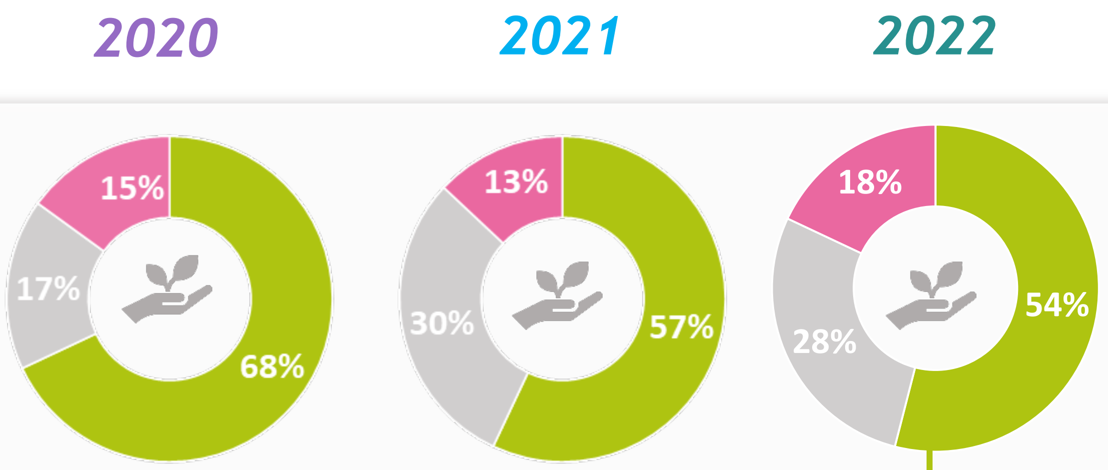
Framing sustainability

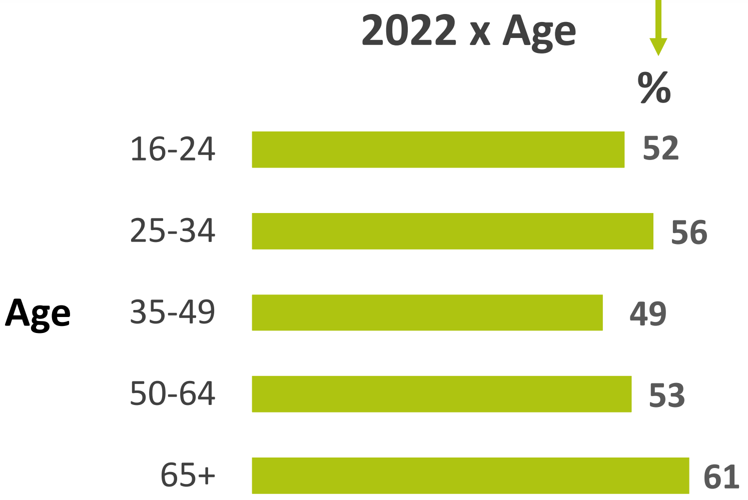
Environmental guilt has lifted a little since 2020

Base: All adults 16+ n = 1,019

Any agree
Neither agree nor disagree
Any disagree

I am extremely concerned about environmental issues



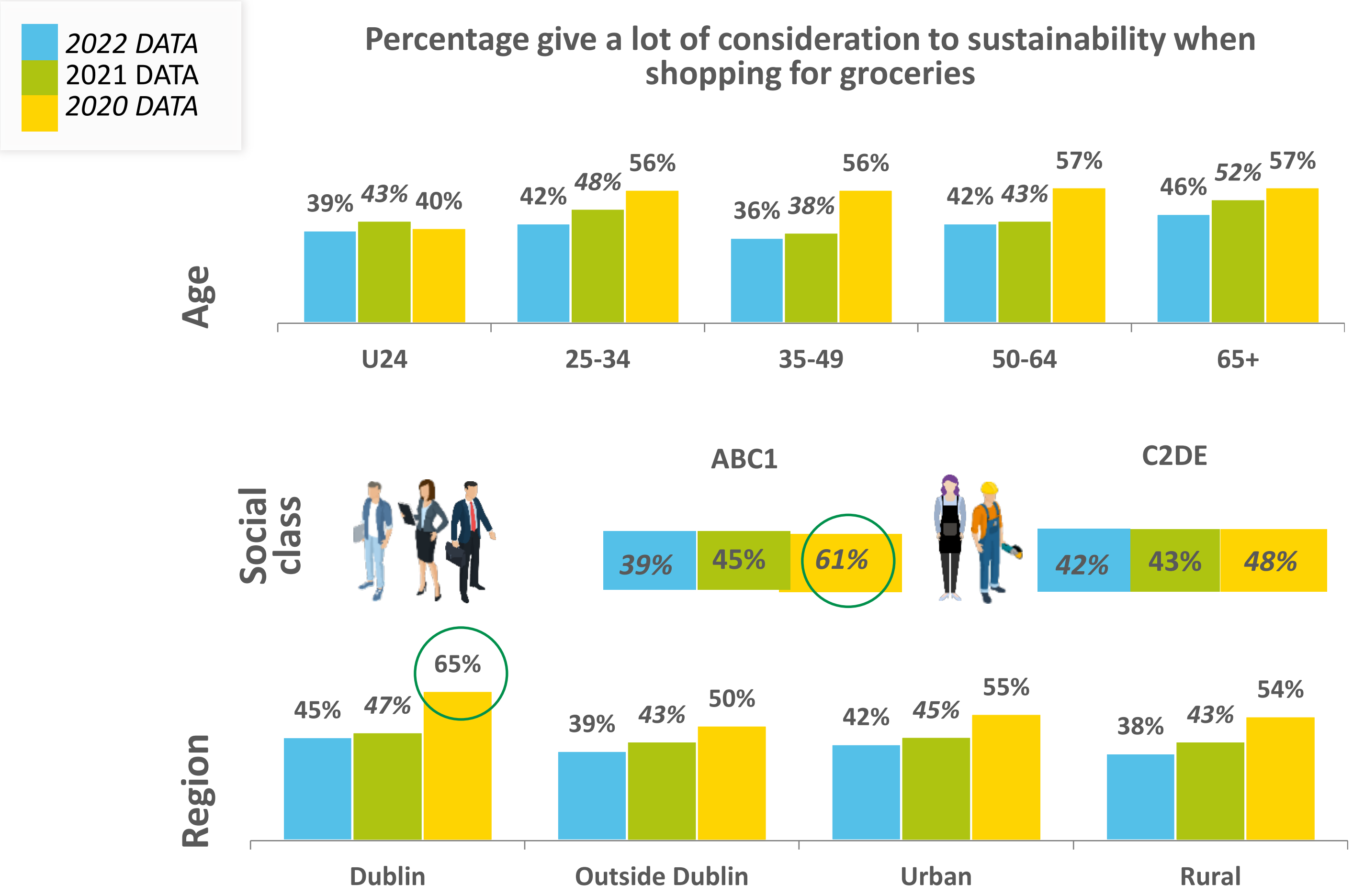


With signs of lower consideration for sustainability in day to day activities - illustrates the challenge of changing mindsets and behaviour

Base: All adults 16+ N = 1019

I give a lot of consideration to sustainability when shopping for groceries

(44% - 2021)
(54% - 2020)



Largest decrease from the 35-49 age cohort, ABC1's and those living in Dublin.

 Q.4b Agreement Level ...I give a lot of consideration to sustainability when shopping for groceries

Where to from here?

Our attention span is being **stretched to its maximum capacity**, with other urgent issues a **more pressing concern in people minds**

In addition, messaging around sustainability and environmentalism is becoming **somewhat tired.**

The 'doom and gloom' messaging particularly in the last 6 months has made us somewhat despondent.

We need to rethink how we connect with consumers on sustainability and climate change

Motivation is flagging for the following reasons

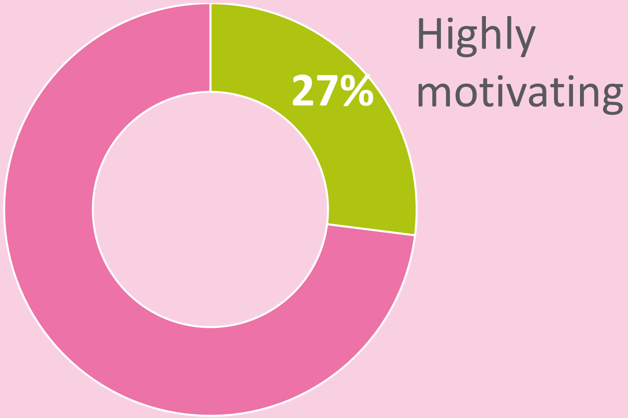
- Environmental change can be associated with cost (so, is the green loan **OR** EV more expensive? – brands/government need to tackle this
  - Major barrier.
- We don't feel empowered or informed enough to make the changes required.
- We don't see leadership from government or big business to help us do so.
- Our political parties (as a collective) are not signalling this as a priority. Covid showed us what could be achieved when things were truly urgent, almost none of that focus or monetary investment is being put into fighting climate changes.
- We don't feel anything has actually been achieved, or if it has it's too small to be of consequence.
- We feel isolated, with our own efforts not worth much. We need to feel like part of something bigger and that we're all working together.

Framing the right message - A threshold exists of what people are willing to do

Base: All adults 16+ N = 1019

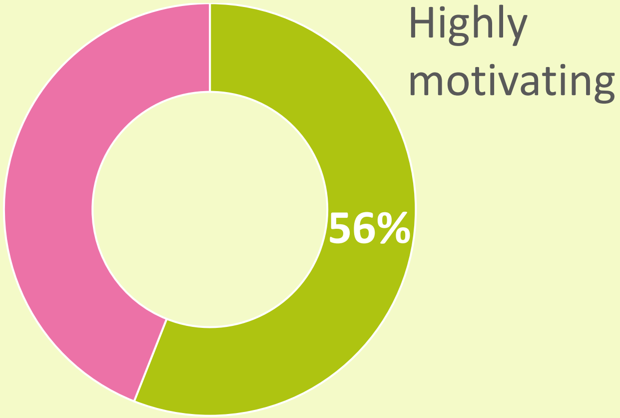
Higher level of personal sacrifice

You should take a staycation in Ireland instead of a flight to reduce your carbon footprint.



Lower level of personal sacrifice

Buying and using less plastic can have a big impact on reducing your carbon footprint



Manageable 'asks' that don't overstretch are likely to get better buy in from the general public.

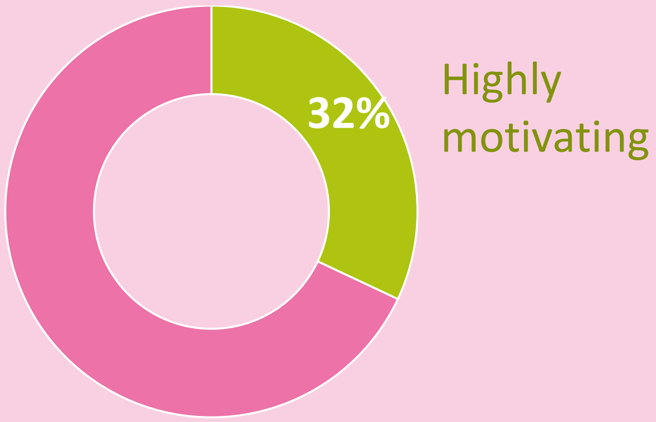
Q.7 How effective are these communications in motivating you to reduce your carbon footprint?

Framing the right message - Positive framed messaging is perhaps more promising

Base: All adults 16+ N = 1019

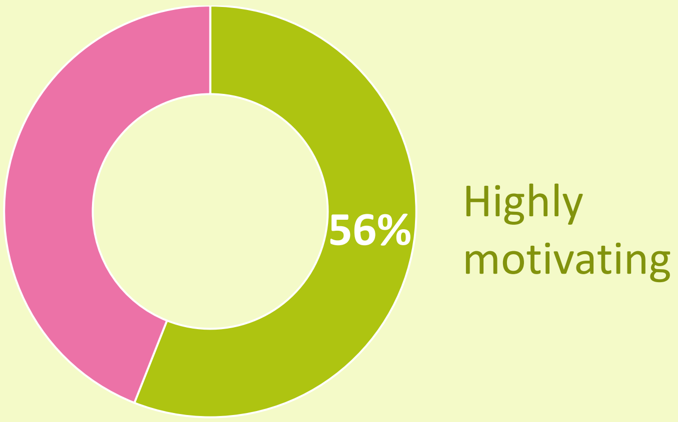
Negative framing

Making a few small changes to your day-to day behaviour is not enough and is only a first step in reducing the impact of your carbon footprint.



Positive framing

Making a few small changes to your day-to-day behaviour, can have a big impact on reducing your carbon footprint.



Positively framed messaging in which we reinforce the value of making changes is likely to be more effective than pointing out challenges.

Q.7 How effective are these communications in motivating you to reduce your carbon footprint?

Thought starters for brands

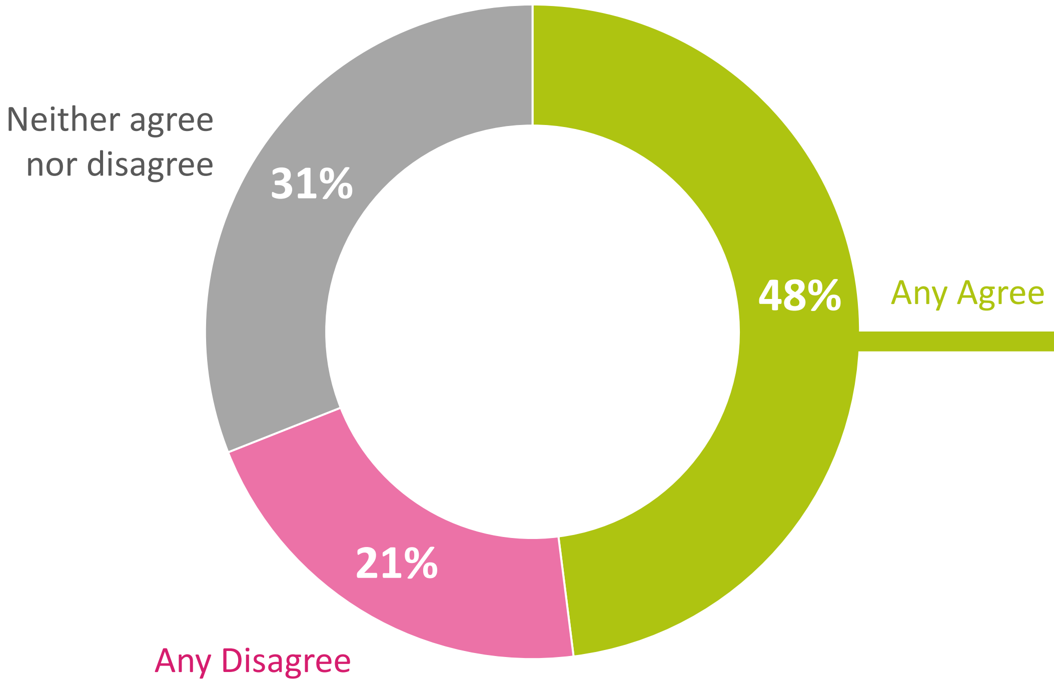
- Consider your messaging – consumers are much more open to changing behaviour if you start small and frame it in a positive way.
- Tone is also important. The constant doom and gloom with no strategies for improvement are causing consumers to disengage.
- People need to be given strategies and clear direction on what makes a difference – any brands that can do this will be at a big advantage.
- The feeling that green behaviours should make economic sense for the consumer continues to grow and there will be very little patience for paying more for green options as the cost of living crisis kicks in.
- The individual consumer knows they can't achieve much on their own. Making people feel like they're part of a bigger, collective effort is so important.
- **NB:** If a brand is 'becoming greener' be authentic and clever otherwise it is washing and wallpaper – people see this.

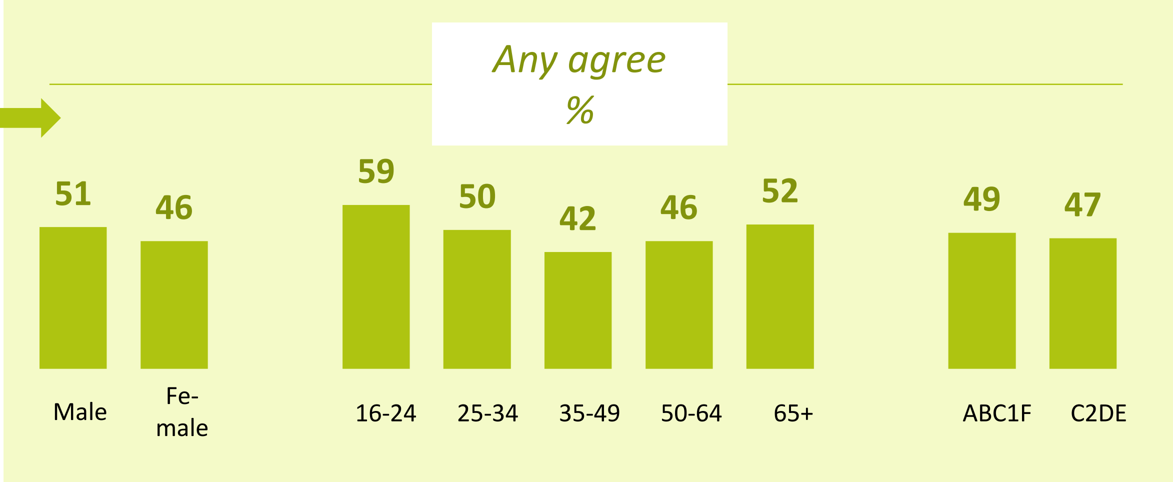
Adjusting to a new future reality

Half of all consumers feel that Ireland is on the right track to becoming a more equal society

Base: All adults 16+ N = 1019

I feel that Ireland is on the right path to becoming a more equal society…





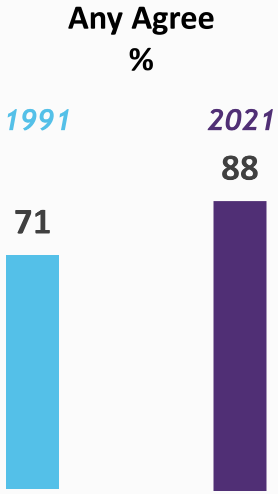
Young/mid family age cohorts are the least likely to agree that Ireland is on the right path to becoming a more equal society.

Q.4b To what extent do you agree or disagree with the following …

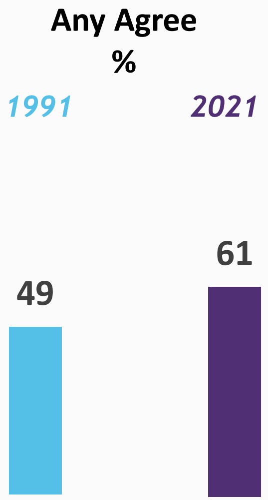
A growing liberal outlook

Base: All adults 16+ N = 1,005

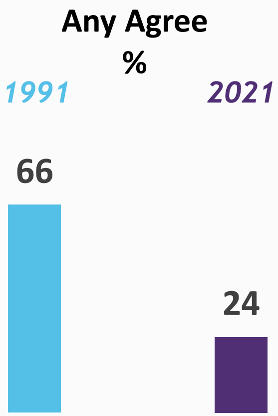
I believe a woman with small children can work outside the home and still be a good mother



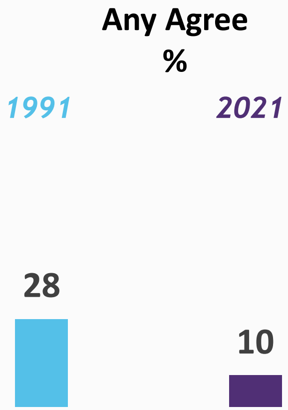
I think the sexual freedom of today is a very good thing



Abortion is always wrong



Divorce is always wrong

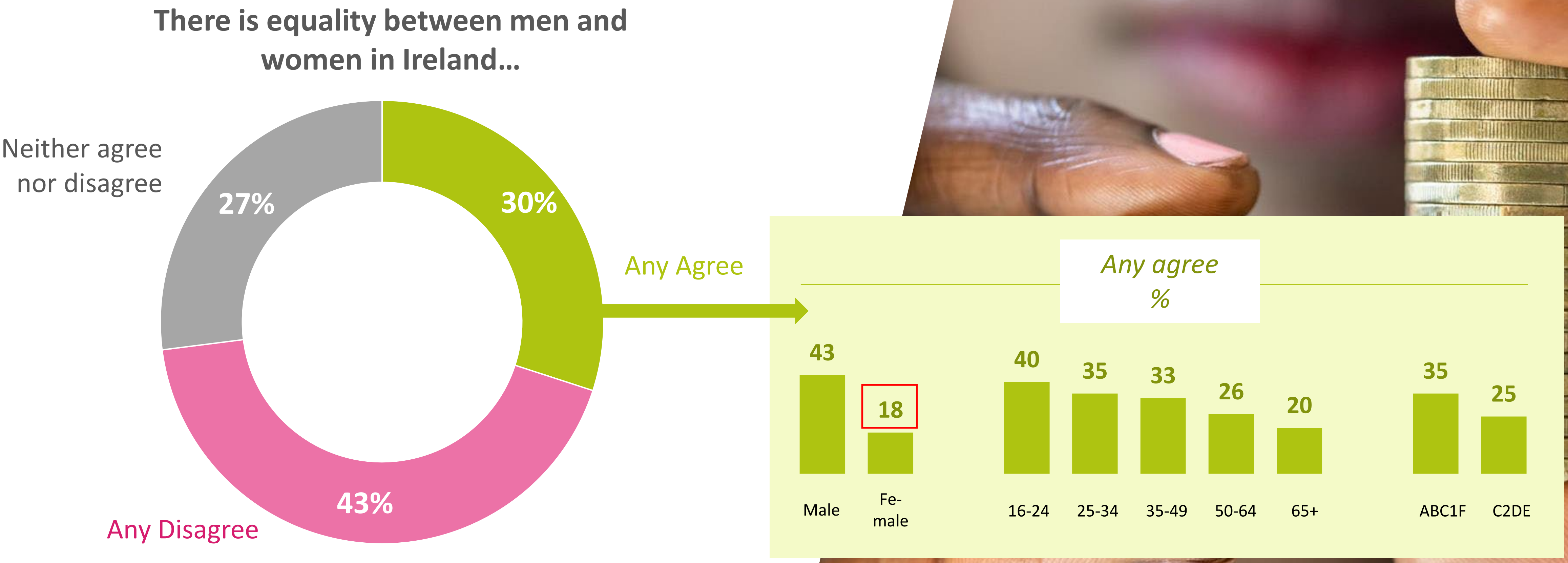


**F2F*

Progress seen across the board, but particularly in regard to ideas of women in society, with an increase in agreement that women can work and be a good mother and a decrease in agreement that abortion is always wrong.

Yet, there is a significant difference between how men and women view the current state of equality in Ireland

Base: All adults 16+ N = 1019



Younger age cohorts are more likely to agree that there is equality between men and women in Ireland today, are those in the middle class. A large gap in attitudes exists between men and women in terms of how much equality exists.

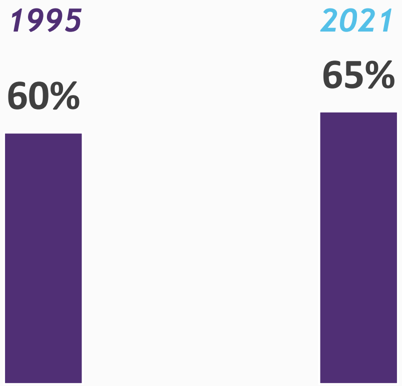
Q.4b To what extent do you agree or disagree with the following …

People still resistant to the pace of change (2 in 3), but we actually seem to have become more accepting of the pace of life. Albeit 50% still wish to slow down

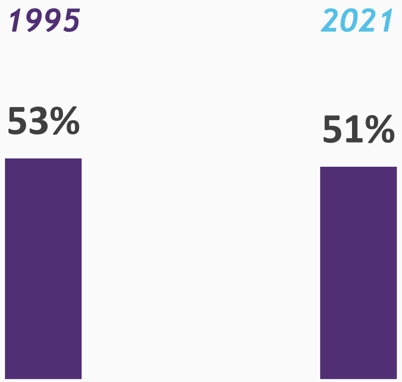
Base: All adults 16+: 1,005

*F2F

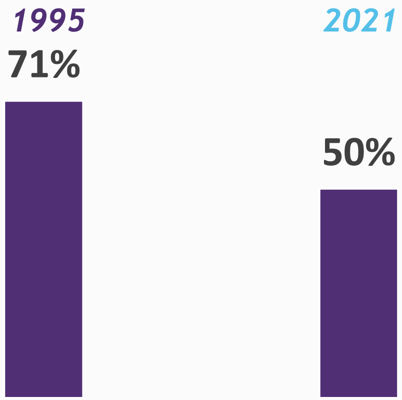
Everything is changing too quickly nowadays



I like to spend as little time as possible preparing meals



I wish I could slow down the pace of my life



Very similar results between 1991 and 2021, with the exception of slowing the pace of life down, which has decreased substantially since 1995, likely due to the pandemic.

Q.2a/2b/Q.3a To what extent you agree or disagree ...

Time pressed x demographics

Base: All adults 16+: 1,005

Any Agree

	Total	Gender		Kids in HHold		Age					Social Class		
		Male	Female	Yes	No	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	F
UNWTD	***1005***	***495***	***510***	***380***	***625***	***149***	***151***	***283***	***232***	***190***	***484***	***472***	***49***
	%	%	%	%	%	%	%	%	%	%	%	%	%
Everything is changing too quickly nowadays	65	63	68	67	64	53	54	69	68	76	59	72	59
I like to spend as little time as possible preparing meals	51	53	48	47	53	61	49	46	52	51	52	50	48
I wish I could slow down the pace of my life	50	45	54	58	44	43	45	61	50	40	49	51	44

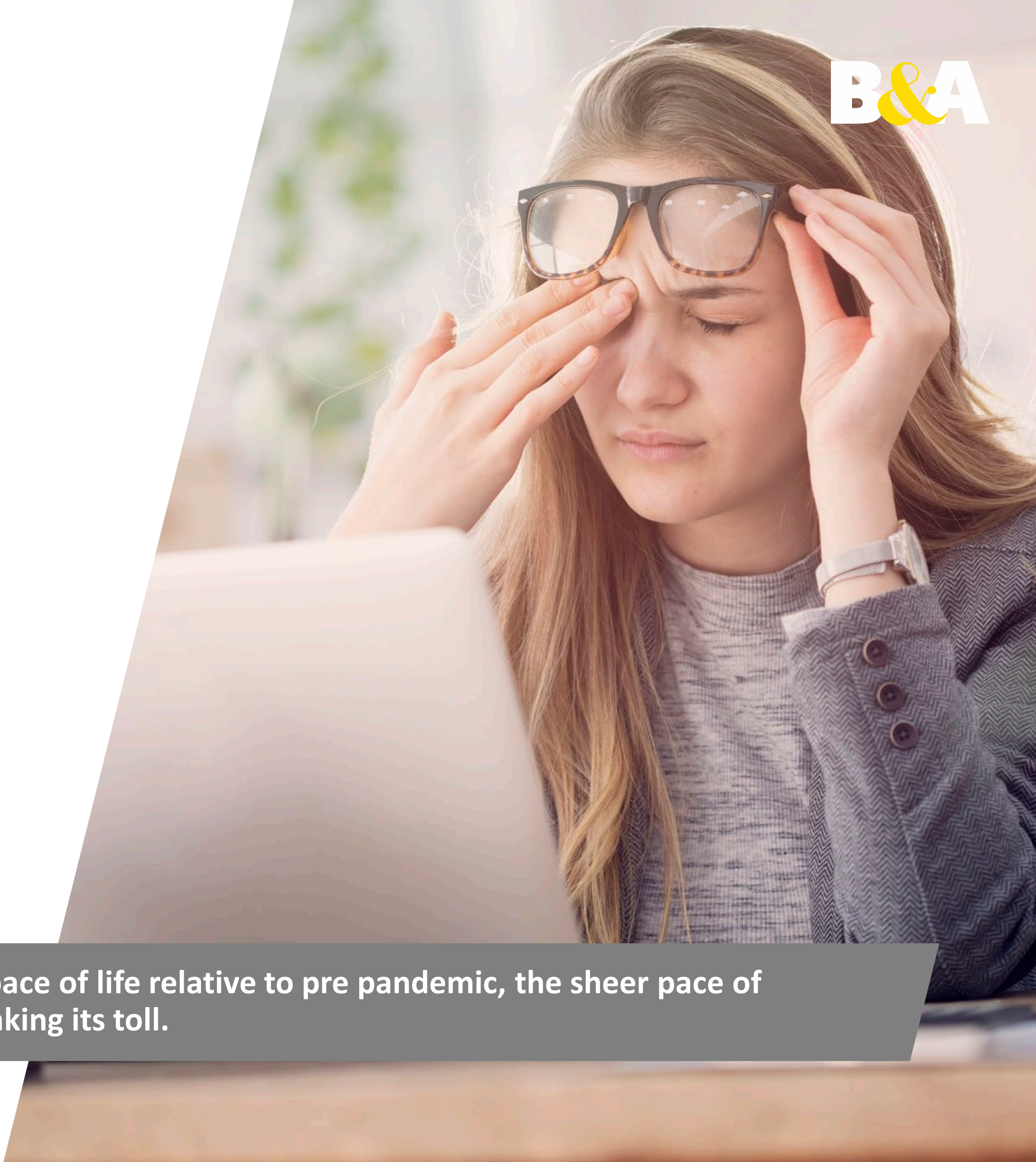
***F2F**

Once again, we see younger cohorts show signs of indifference to diet, with a focus on quick prep meals much higher among this cohort. Those with kids are much more likely to want to slow down the pace of life, with

Q.2a/2b To what extent you agree or disagree ...

With many feeling tired all the time

Base: All adults 16+ N = 1019



Despite many feeling that they are leading a slower pace of life relative to pre pandemic, the sheer pace of change is taking its toll.

Q.15a Agreement Level ... tired all the time

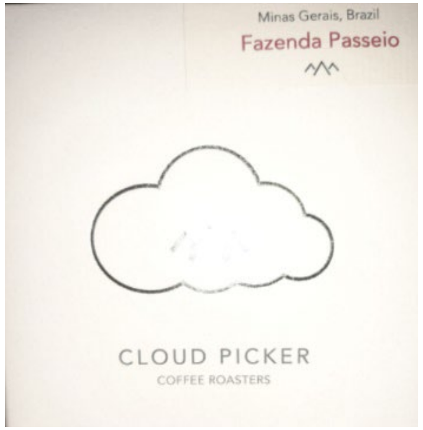
And we are hesitant to go back to how things were before

"I remember the amount of things I was doing before the pandemic, and I don't know how I did it.

"Before Covid maybe there was something happening after work, but I suppose I have just got used to a bit more of a slower pace. I don't want to be constantly on the go anymore.

Even with the removal of restrictions, many are reluctant to get back to the volume of things that they were doing before the pandemic on a weekly basis.

But most are reluctant to sacrifice the things that make the everyday that little bit more special



Spotify

NETFLIX

New habits formed during the pandemic…and 'Me to me' gifting, even on a small scale, is likely to endure as we look for ways to make the everyday a little bit more special.

Caution about the future?

Nationally representative n=1,000

Likely to happen

68%

Of people believe we will retire at a later age

60%

Believe Irish culture will be dominated by technology companies

Unlikely to happen

52%

Do not believe that social media companies will lose their popularity

46%

Believe the government will not play a smaller role in their lives

45%

Don't feel a united Ireland will happen

What is deemed likely/unlikely to happen by the year 2030?

Base: All adults 16+ 1,005

Unlikely to happen % - ANY 1-3		Likely to happen % - ANY 5-7
12	More people will be doing some or all of their work at home on a computer	74
17	People will retire at a later age	68
16	Education will at least involve some online video conferencing instead of full-time physical attendance at school/college	66
22	The majority of vehicles on our roads will be electric	63
18	I expect an increasing number of people to come to live in Ireland	61
21	Ireland’s culture will be dominated by technology companies	60
21	Computers/tech will be able to diagnose illnesses and medical problems	59
21	More mothers with young children will be working full time outside the home	57
22	More people will work part-time	53
33	A robot will vacuum and clean your home	49
29	More people will set up their own businesses	44
34	More people will leave Ireland seek employment	43
45	A reunited Ireland will happen	31
52	Social media companies will lose their popularity	30
46	Government will play a smaller role in the life of citizens	28

Clear doubts around a united Ireland, a more laissez faire government, and decreasing popularity for social media companies, while many are backing increased reliance on tech in work and study, and a delay in retirement plans in the future.

Q.7 To what extent do you think each of the following will happen by the year 2030 ...

Which of these are seen as good or bad things to happen (by 2030)?

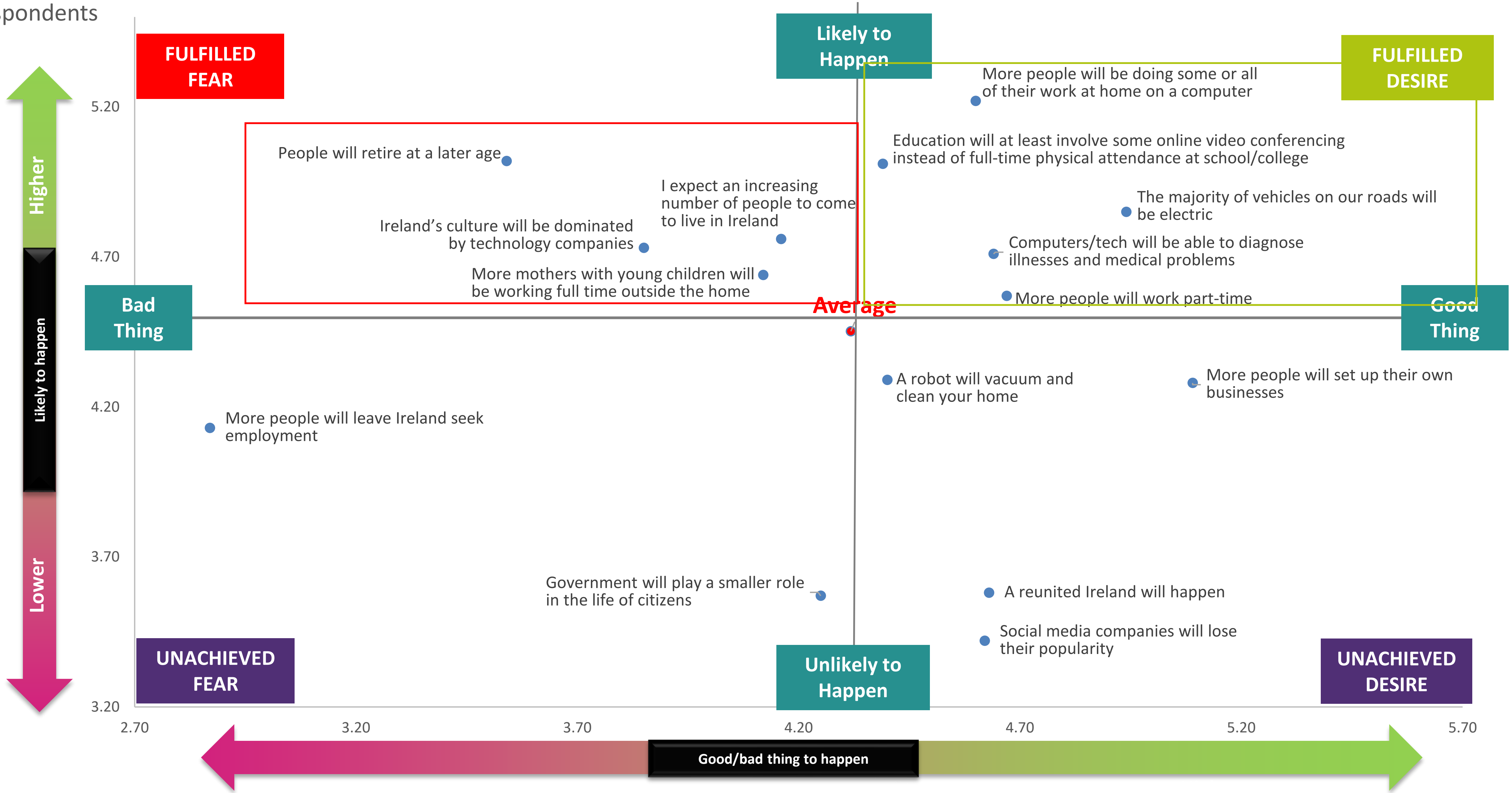
Base: All adults 16+ 1,005

Worries about emigration, later retirement and the role of tech companies in our society are significant, while, in contrast, many view the role of technological advancements in motor vehicles and healthcare to be a good thing, alongside more flexible working and budding entrepreneurship.

Q.8 To what extent do you think it would be a good or bad thing? ...

The Future 2030 : Later retirement & tech-dominated culture, immigration and mothers working full-time outside the home are the key fears that people feel are most likely to happen. Likely fulfilled desires for the future centre on; tech aiding society in the form of medical diagnosis & more flexible and home working/study options and EVs

Base: All respondents



 Q.7 To what extent do you think each of the following will happen by the year 2030 .. Q.8 To what extent do you think it would be a good or bad thing? ...

Key takeaways

Key takeaways

Contrasting realities – very different experiences & attitudes in Ireland. Take, for example, the rate of **obesity** (up from **11% in 1991** to **26% in 2021**); this major increase is met by **equally major increases in exercise and a growing focus on healthy eating.** There are clear signs of **contrasting lifestyles** within Irish society.

Lasting resiliency in the Irish psyche – **Openness to trying new things** (72% 1991; 69% 2021) and feelings of **better days/achievements ahead** (56% 1991; 55% 2021) have remained **steady**. What is particularly notable about this is the timing of the research, with 1991 and 2021 both being quite **tumultuous** periods of time for Irish society **following severe recession**.

Our palate is widening, but quick convenience is also key – there have been substantial increases in eating foods with **garlic** (46% 2021; 17% 1991), **Chinese & Indian food** (16% 2021; 6% 1991), drinking **wine** (28% 2021; 9% 1991), & a love for **buying good food** (65% 2021; 56%). However, **convenience** has equally become an important aspect of eating – 30% buy food from a **takeaway** weekly (21% 1991) & 20% purchase ready prepared meals weekly (3% 1991).

Key takeaways

B&A

Growth in Individualism & Impulsive behaviours – **Less church going, parties, and visits to pubs** (likely impacted by the pandemic), paired with **increases** in activities such as **computer games**, indicating a growth in more **individualistic** behaviours. **Impulsiveness** has also increased, with reduced agreement that its good to save for a rainy day (86% 2021; 94% 1991), its important to be well insured (76% 2021; 88% 1991), and increases in making **decisions on gut feeling** (64% 2021; 58% 1991)

Business as usual – feelings of **time pressure** are quite similar between 1991 and 2021, with the exception of the wish to **slow the pace of life** (50% 2021; 71% 1995). This is likely due to the pandemic and the impact of the lockdown measures and shut down periods for the entertainment and leisure industries. However, the level of agreement that **everything is changing too quickly nowadays** has increased from 60% in 1995 to 65% in 2021.

Monumental developments in women's fight for equality – attitudes towards women have improved significantly, with **88%** now believing **mothers** with young children can **work outside the home and still be a good mother** (71% 1991), only **24%** believing that **abortion is always wrong** (66% 1991), and **61%** believing that the **sexual freedom** seen today is a **very good thing** (49%). This is met with increased numbers of women in the workplace, which has undoubtedly aided shifts in attitudes.

Key takeaways

New issues arising, but some are lingering – 30 years on, there are new issues arising, namely **technological progress** (54% agree that technological progress is destroying our lives), **climate change** (68% are worried about pollution and the environment), and **income inequality** (78% believe wealthy people minimise tax bills using clever accountants; 75% believe it is too easy for people to manipulate the system to their advantage). However, more standard, every day worries are the key issues raised by respondents with the **healthcare system** (49%) and **affordable housing** (47%) being the top two.

Tech the friend & foe of the future – tech is bringing about conflicting opinions about the future with many acknowledging the positives in the form of **medical diagnosis and more flexible approaches to working & study**. However, there are substantial fears surrounding our **culture being dominated by tech companies**. Outside of this, there is an expectation that people will **retire later and more people will come to live in Ireland from abroad**; both of which are viewed as **negatives** for Ireland.

So, what: Implications for organisations, brands, & society

Increasing population bodes well for the economy & business… but presents some planning challenges from a government perspective.

Urbanisation has continued to trend upward... Brings about questions on whether rural living is really gaining in attraction as initially thought when working from home first began en masse in 2020. Social life and resources also key in living a fulfilling life.

Increased focus on healthy diets and lifestyles alongside support for tech-driven medical diagnosis hints at increasing potential for health-orientated products and services.

With progress, there is often a catch – and many don't necessarily join the dots. The development of **tech** over the last 30 years has resulted in many anxieties regarding a shift in our culture and the role of tech in our daily lives. However, these fears are paired with a surging rise in use of laptops, phones, and gaming. When looking at women's role in society, we can again see major positive developments in the form of changing attitudes and increased engagement in the workforce. However, we also see rising in house prices, part of which is likely influenced by the growth in dual-income households.

Progress does not always sit well with all in society – **Immigration** is still a divisive issue with a third viewing it as negative while 2 in 5 view it as positive. **Mothers working outside of the home** is also divisive with a third viewing it as negative and 2 in 5 viewing it as positive.

Increased **working from home has been welcomed and is desired moving into the future** with many ramifications:

- Where we buy our coffee (on-the-go or homemade?)
- How we separate home & work
- How we consume our lunches
- Transport – what way will we travel now? The impact on ticketing in public transport?
- How organisations maintain their culture in a hybrid work environment

A clear love/hate relationship with tech is unfolding which has many impacts in our society:

- We are living in an **insular, tech driven society**, but there are signs of desire for **social contact & connection** – as a result, organisations need to consider how they utilize **both in-personal and online to deliver adequate CX**.
- Focus will also need to be placed on **building brands creatively in an increasingly digital world**, likely through developing **emotional connection**. Strictly transactional relationships with brands online is part of the fear surrounding tech-dominance, which highlights the **growing need for offline comms**.

Where we are now

Contrasting realities – very different experiences & attitudes in Ireland. Take, for example, the rate of **obesity** (up from **11% in 1991** to **26% in 2021**); this major increase is met by **equally major increases in exercise and a growing focus on healthy eating.** There are clear signs of **contrasting lifestyles** within Irish society.

Growth in Individualism & Impulsive behaviours – **Less church going, parties, and visits to pubs** (likely impacted by the pandemic), paired with **increases** in activities such as **computer games**, indicating a growth in more **individualistic** behaviours. **Impulsiveness** has also increased, with reduced agreement that its good to save for a rainy day (86% 2021; 94% 1991), its important to be well insured (76% 2021; 88% 1991), and increases in making **decisions on gut feeling** (64% 2021; 58% 1991)

Monumental developments in women's fight for equality – attitudes towards women have improved significantly, with **88%** now believing **mothers** with young children can **work outside the home and still be a good mother** (71% 1991), only **24%** believing that **abortion is always wrong** (66% 1991), and **61%** believing that the **sexual freedom** seen today is a **very good thing** (49%). This is met with increased numbers of women in the workplace, which has undoubtedly aided shifts in attitudes.

New issues arising, but some are lingering – 30 years on, there are new issues arising, namely **technological progress** (54% agree that technological progress is destroying our lives), **climate change** (68% are worried about pollution and the environment), and **income inequality** (78% believe wealthy people minimise tax bills using clever accountants; 75% believe it is too easy for people to manipulate the system to their advantage). However, more standard, every day worries are the key issues raised by respondents with the **healthcare system** (49%) and **affordable housing** (47%) being the top two.

What it means for brands

B&A

- There was great **appreciation for brands that went the extra mile** during the covid crisis, but it's worth remembering that the many of the younger / poorer members of society are still really struggling. Housing will continue to be high on the agenda for young people in Ireland.   It's the problem that no one seems committed to actually solving (or has the answer).
- Any brands with interest in social cohesion should be looking for ways they can **connect different groups** in society and foster commonalities between them, as this is sorely lacking for today's consumers.
- **Flexibility and balance** are some of the key things people are seeking right now – how can we make all the different aspects of our lives work best for us?
- It's never been more important to have **a great digital offering**, but **In-store is still very important**, particularly if you are targeting older customers or within specific categories
- Customer journeys are becoming more complex, more informed and more interesting. How much do you know about how your consumer is engaging with your brand? Getting a detailed understanding here should be your most important starting point to develop your strategy (talk to us at B&A!).
- Consider your messaging – consumers are much more open to changing behaviour if you **start small and frame it in a positive way**.
- Tone is also important. The constant doom and gloom with no strategies for improvement are causing consumers to disengage.
- People need to be given strategies and **clear direction on what makes a difference** – any brands that can do this will be at a big advantage.

Thank you.

B&A RESEARCH & INSIGHT

@behaviourandattitudes

Behaviour & Attitudes

@banda_ie

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

Delve Deeper