



RESEARCH
& INSIGHT

Sign of the Times 2019



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- 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.



The Live Register

-15.9%

Overall Change
vs. January 2018



86,473

-14.1%

vs. January 2018



113,154

-17.2%

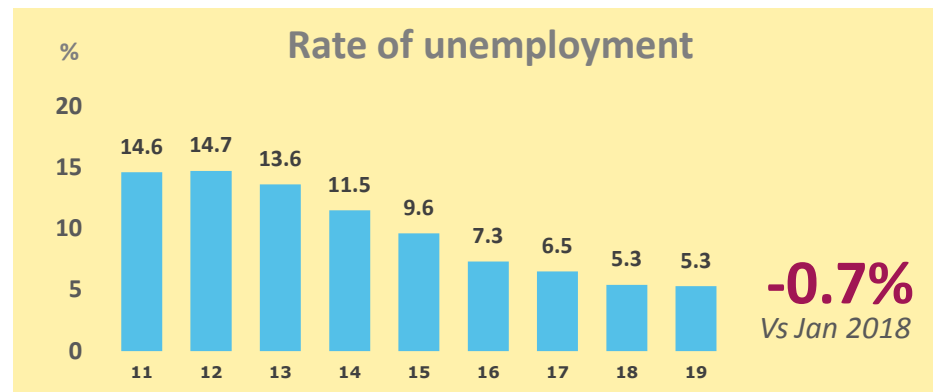
vs. January 2018

Source: [www.CSO.ie/Persons on live register](http://www.CSO.ie/Persons%20on%20live%20register)
* Live Register Total data



Unemployment in Ireland

-1.3%



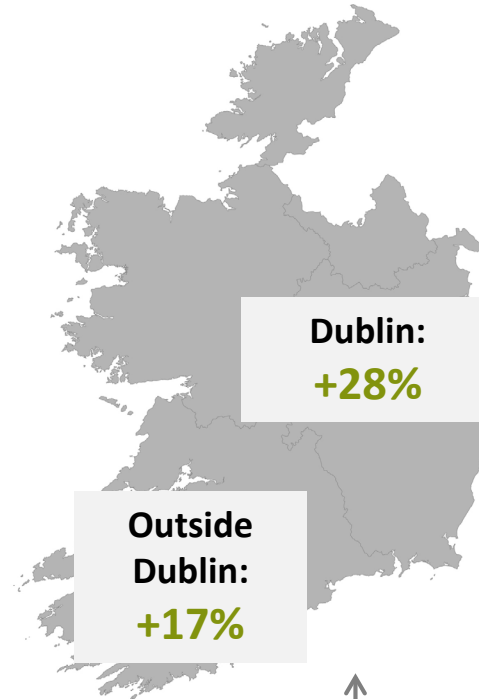
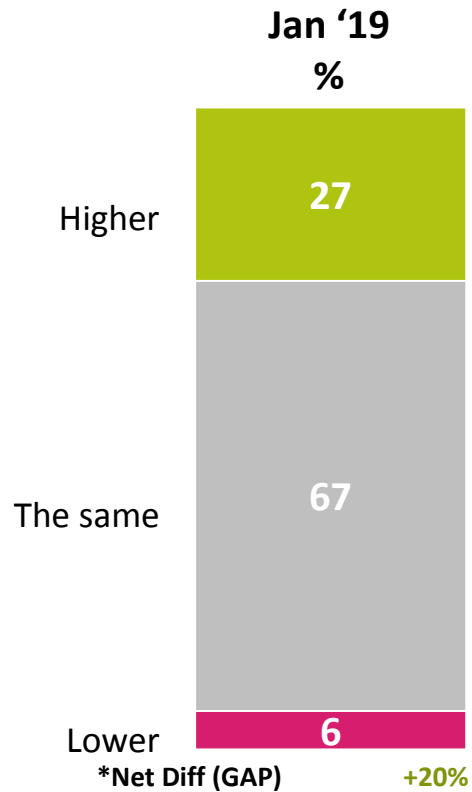
Current Rate of unemployment

(vs. 6.0% in January 2018)



Source: [www.CSO.ie/Quarterly National Household survey](http://www.CSO.ie/Quarterly%20National%20Household%20survey)

We are more positive about personal assets (house prices)



Both those living in Dublin and outside Dublin remain positive towards the values of personal assets but caution is evident.

	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



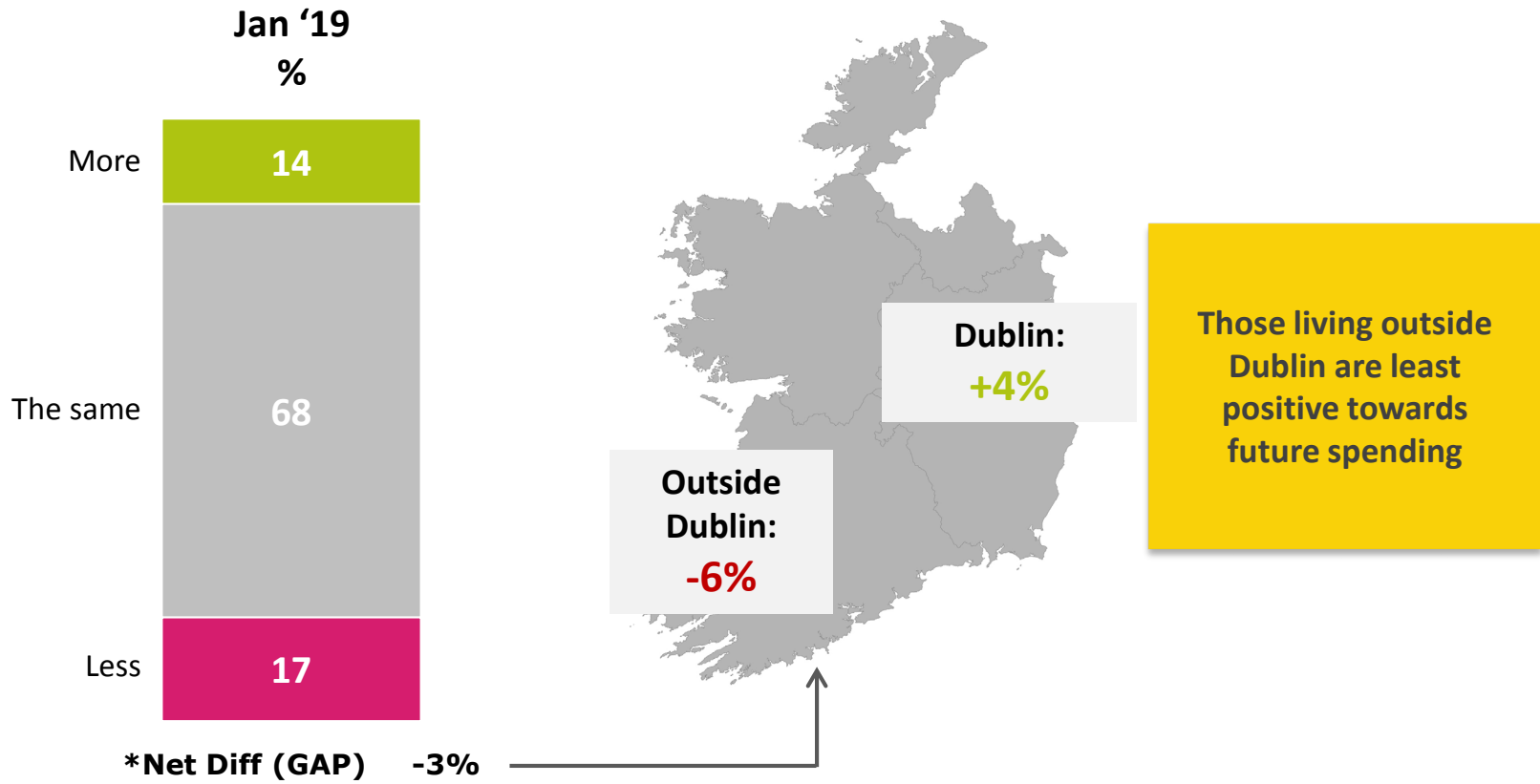
- **Life milestones are in transition**
 - ❖ Creating frictions between generations.
 - ❖ Storing up challenges for the future (who pays for childcare?).
 - ❖ This can leave many feeling a lack of 'moving forward'
- The age of having a family has been shifting older for many years.
- Other symbols of 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.

Modest expectations of 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



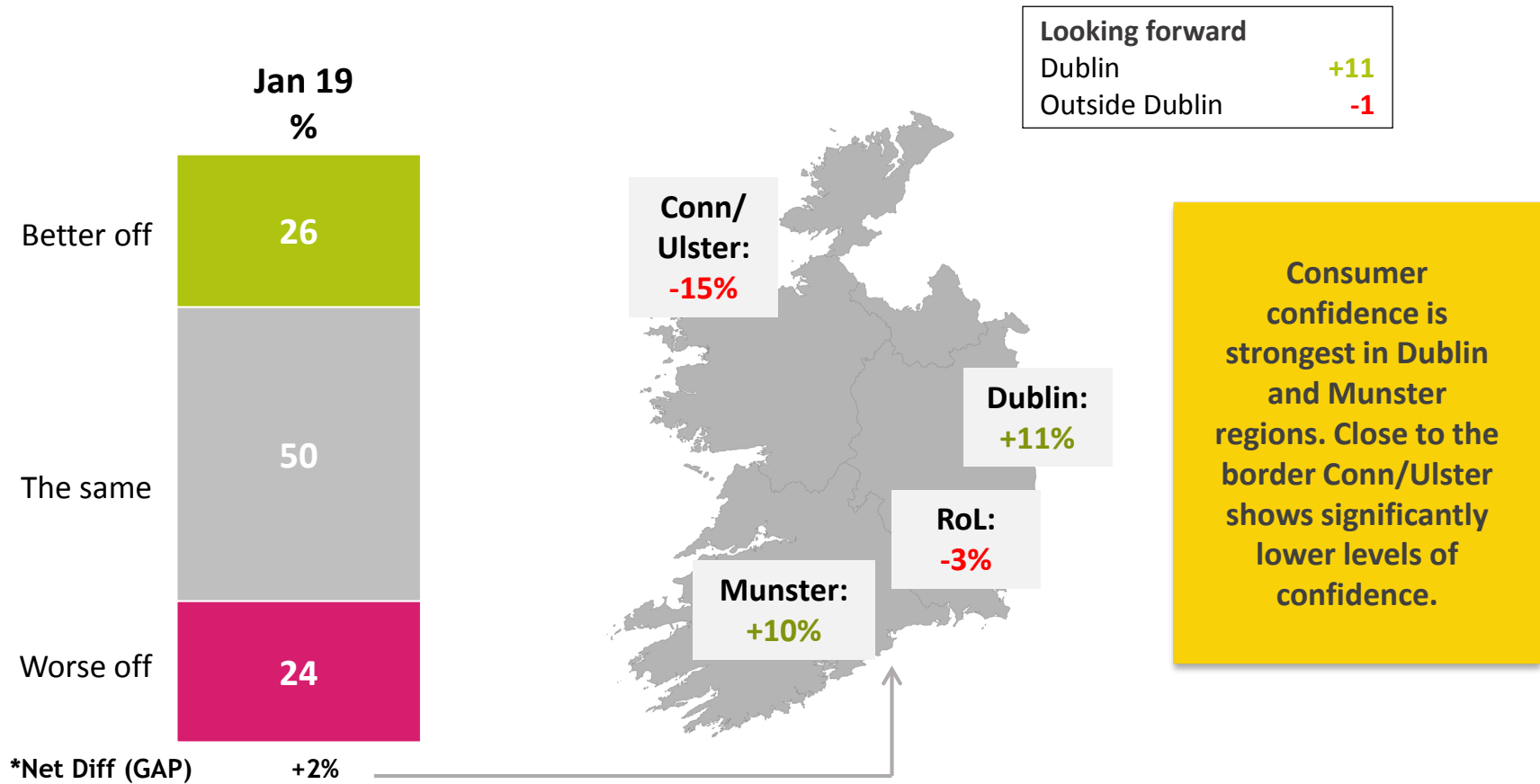
- While there is talk of an improved economy, there is also blinking in this optimism.
- People recognise:
 - ❖ Problems with the health service.
 - ❖ Continuing homelessness challenge.
 - ❖ House prices/rent escalation.
 - ❖ Fall out from Brexit.
 - ❖ A sense of rising cost of living.
- It seems we 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?



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

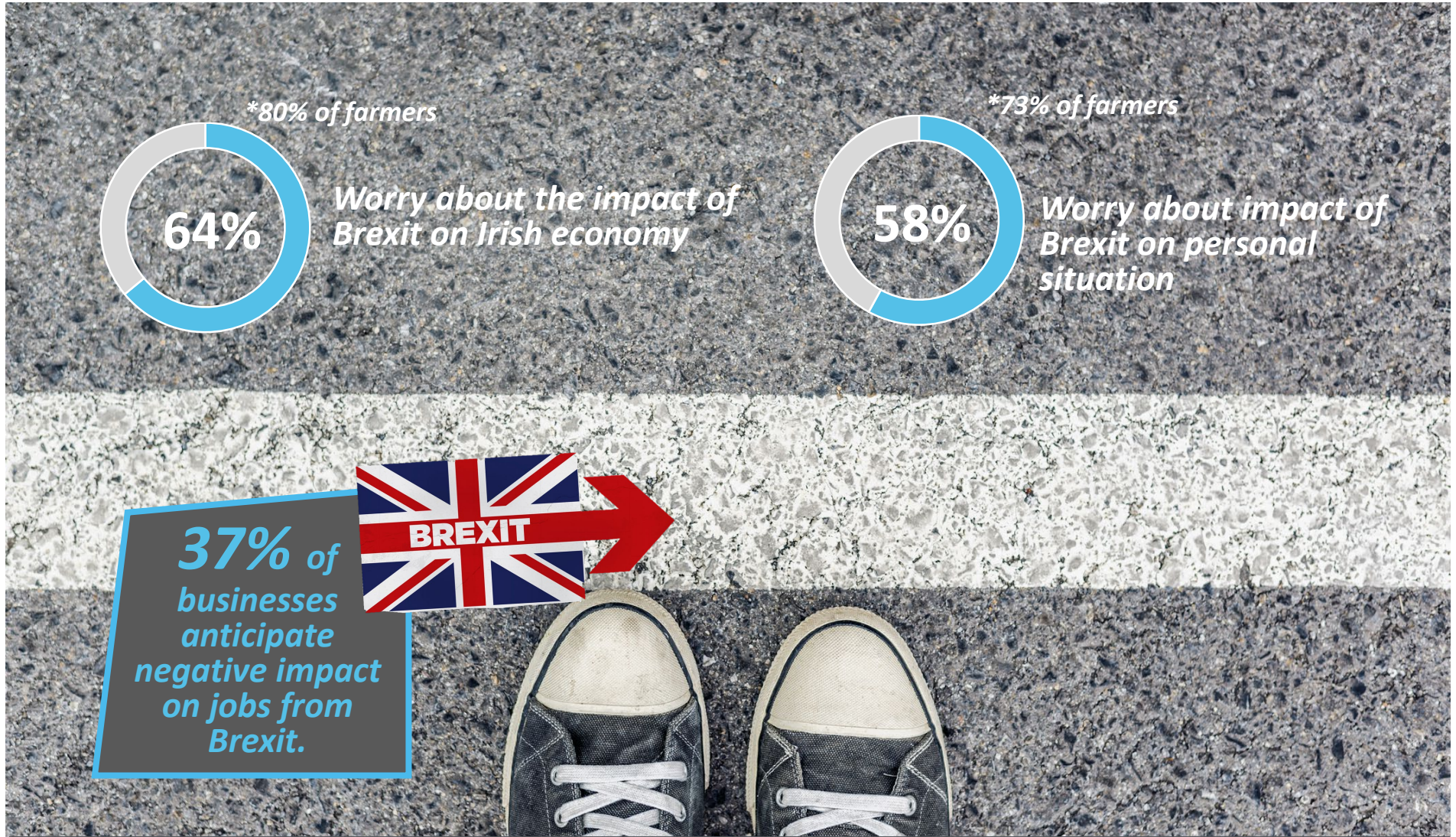
In fact consumer confidence in the economy falling



	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?



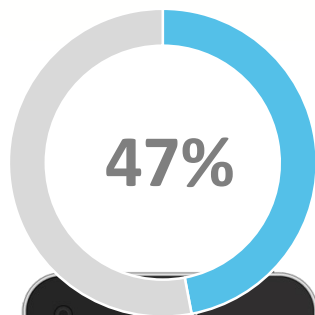
Confidence in the economy has been undermined by Brexit concerns.



Technology

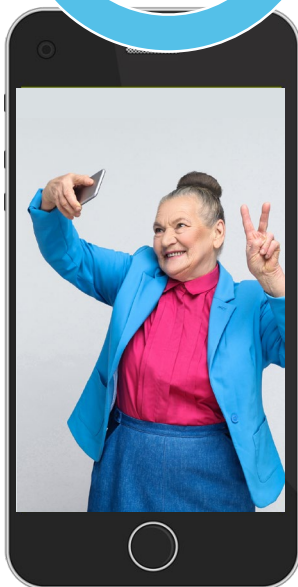
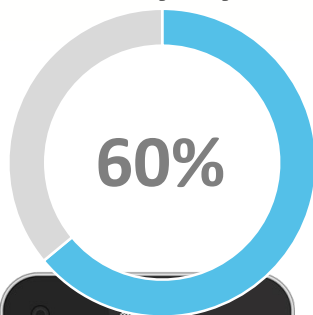
We have a love/hate relationship with technology

Worry about data privacy online



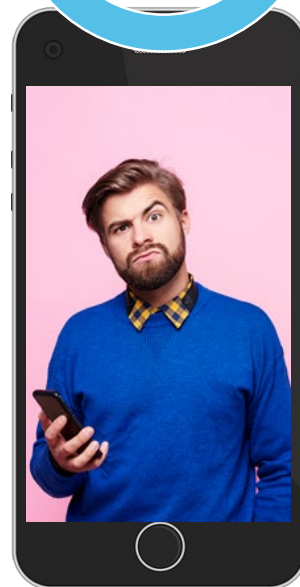
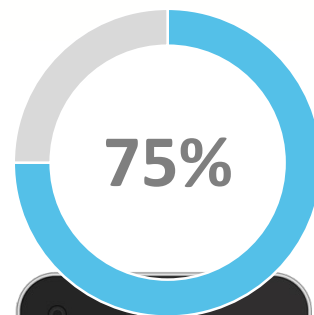
Base: All Adults 18+ (1,000)

Empty Nesters access the internet everyday



Base: Empty Nesters (271)

Sceptical about what I read online



Base: All Adults 18+ (1,000)



We all use it, but have lots of doubts.

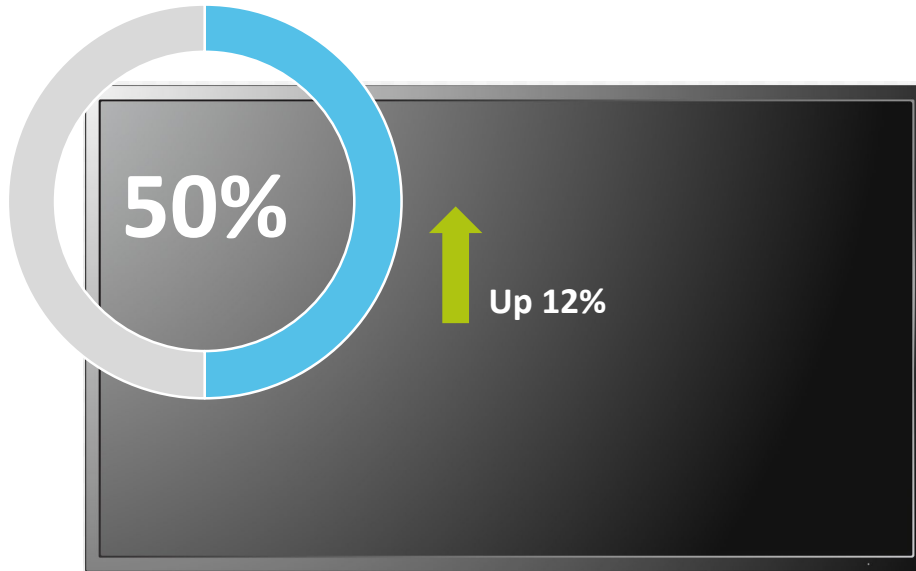
What we buy online..



Category specific variations are clear.

Base: All Adults 16+ who buy products or services online (507)

Have a smart TV

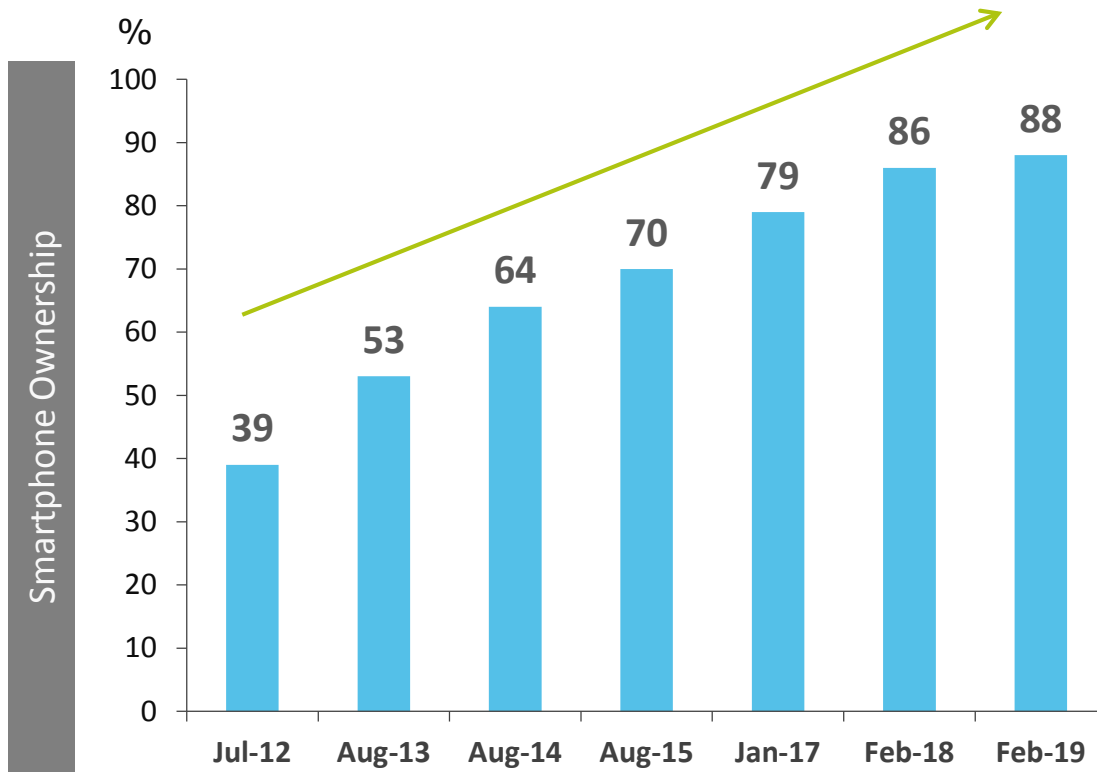


Wearable digital device

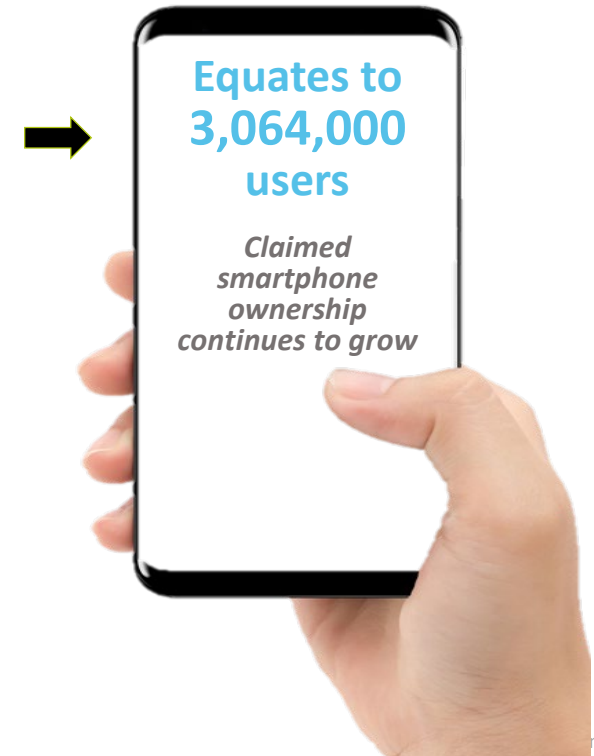


Laptops (69%); tablets (51%), e-readers (15%); all static versus last year.

And everybody has a smartphone (nearly)



**Lowest for 65+ (44%).
But showing rapid change.
(35% last year, 4% in 2012).**



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



We are now spending on average
10 hours a week
(up from 8 hours)
per week on Facebook



Base: All Facebook users (652)



Single

13 hours



Pre-family

10 hours



Family pre school

11 hours



Family pre teen

11 hours



Family teen

9 hours

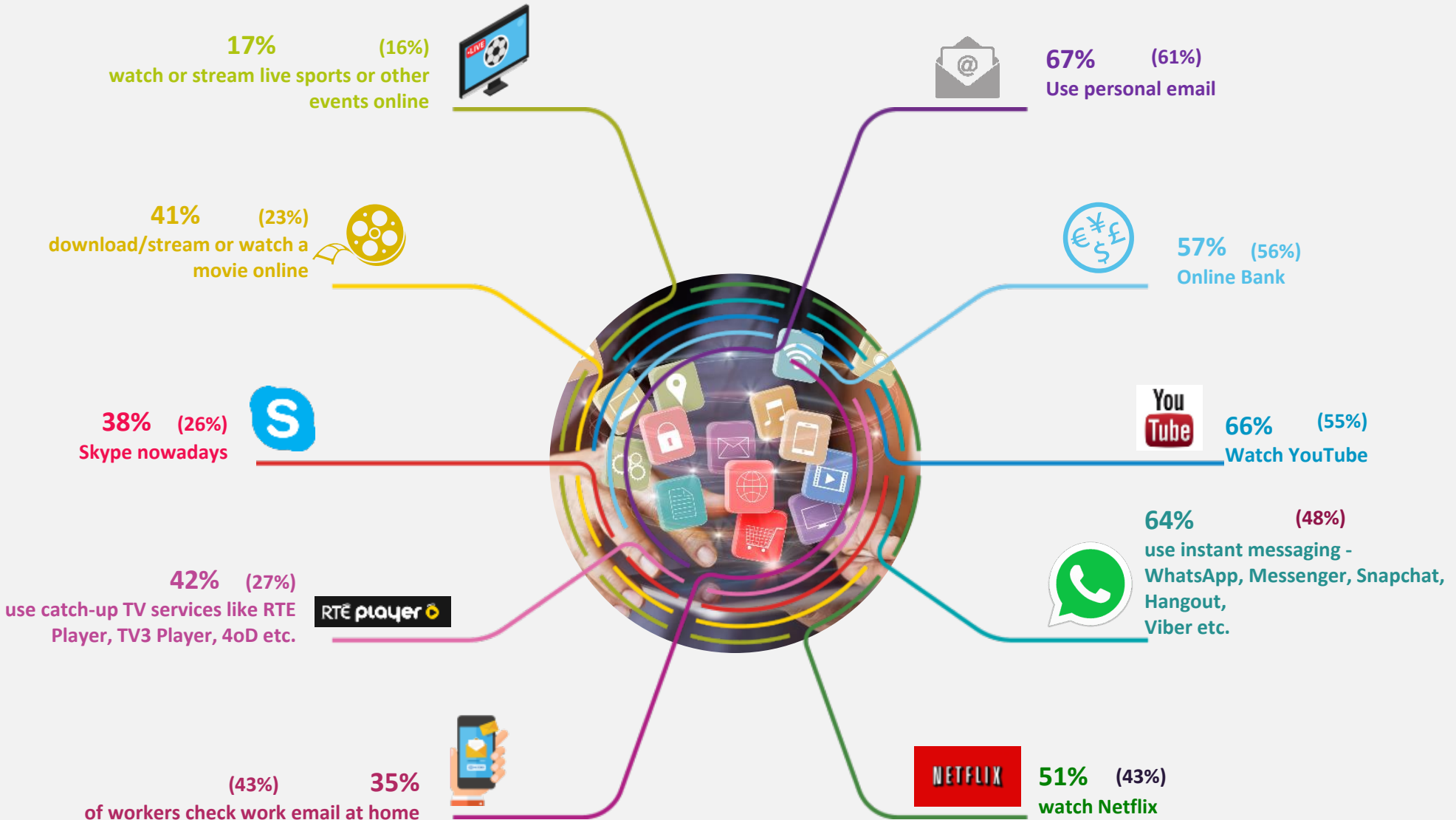


Empty nester

5 hours



Online services we use



Base: All adults 16+ (1,000)

() = Feb 2018 data

Ⓚ Which of these do you do nowadays anywhere?



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?





Technology that heals?



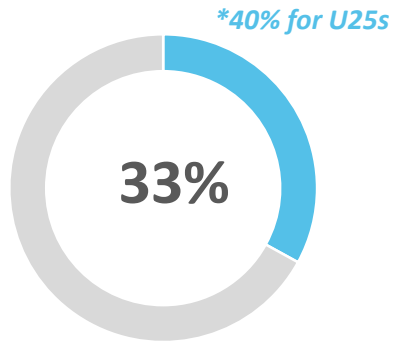
- Technology has delivered tangible benefits at a profound level, stitched into the fabric of society
 - ❖ Far flung families connect despite 1,000s of miles and shifted time zones in between.
 - ❖ Communities form around meaningful shared perspectives
 - New mums,
 - Local volunteers,
 - Sports coaches,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

“

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.

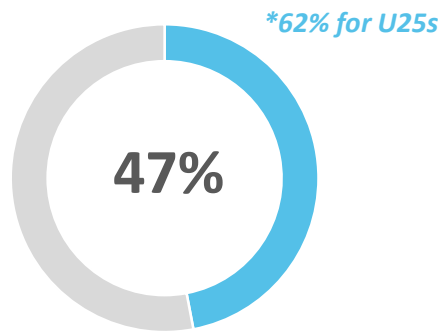


Many are feeling negative impacts



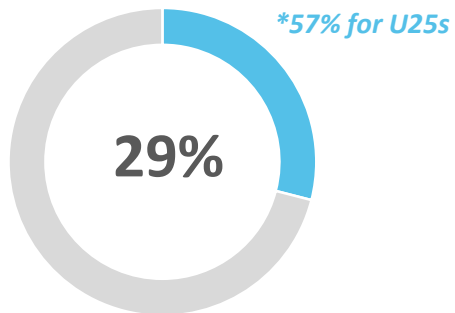
Social media is a source of anxiety and stress

Base: All Adults 16+ (1,000)



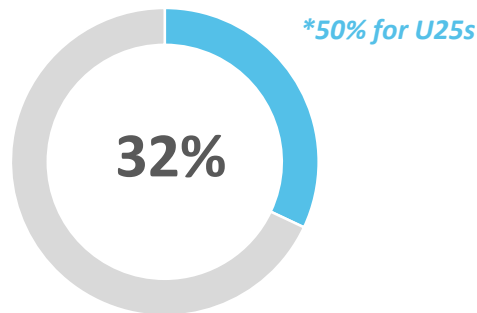
Tried to reduce online social media activity

Base: All Adults 18+ (1,000)



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

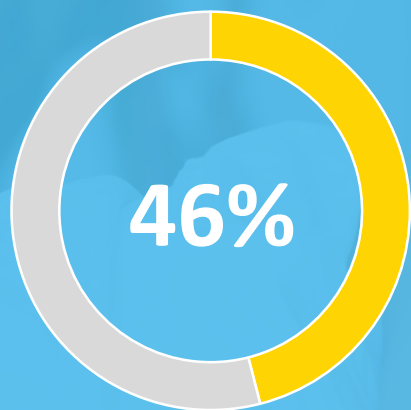
Base: All Adults 18+ (1,000)



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.




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



Down from 60% in 2017

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



Single  53%

Pre-family  52%

Family pre school  57%

Family pre teen  49%

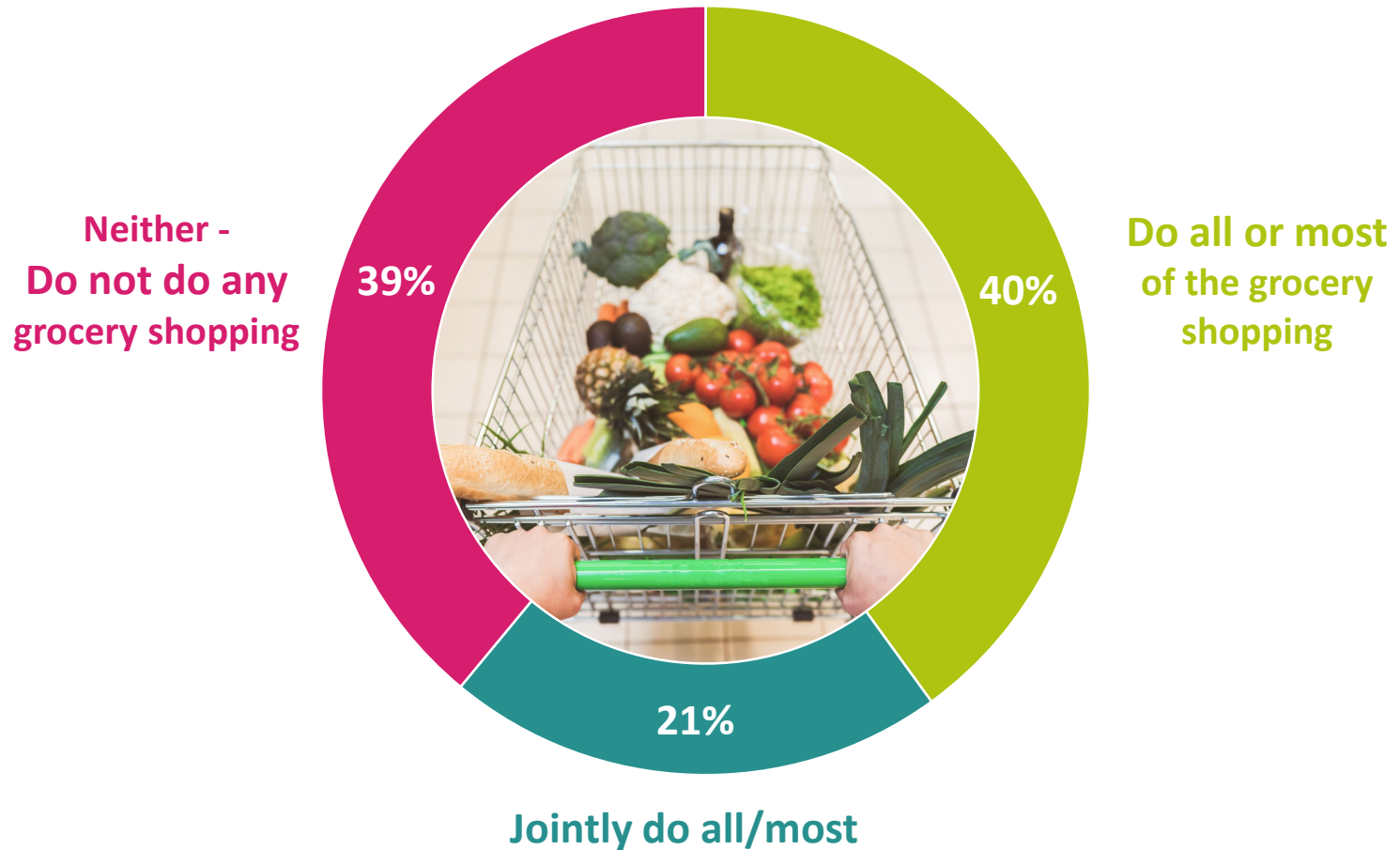
Family teen  48%

Empty nester  29%



Shopping

Who is shopping?



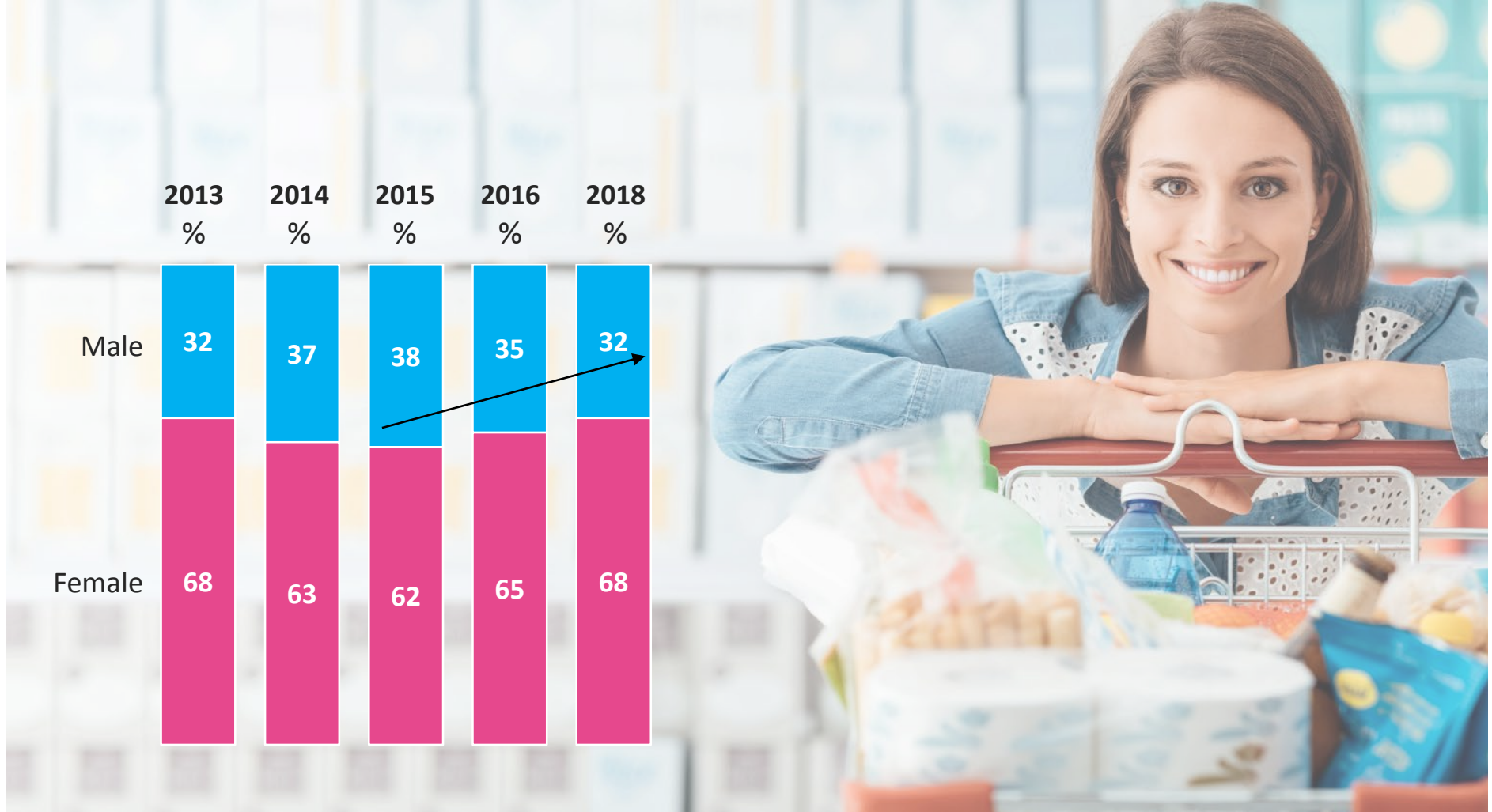
Base: All Adults aged 16+ (1,004)

Q.1 Are you personally or jointly responsible for all or most of the grocery shopping in your household?

Source: B&A Retailer report 2018

J.9580 | B&A Sign of the Times | 2019

Who is shopping?



There has been a gradual increase in the proportion of shoppers who are female over the past two years.

Base: All grocery shoppers (623)

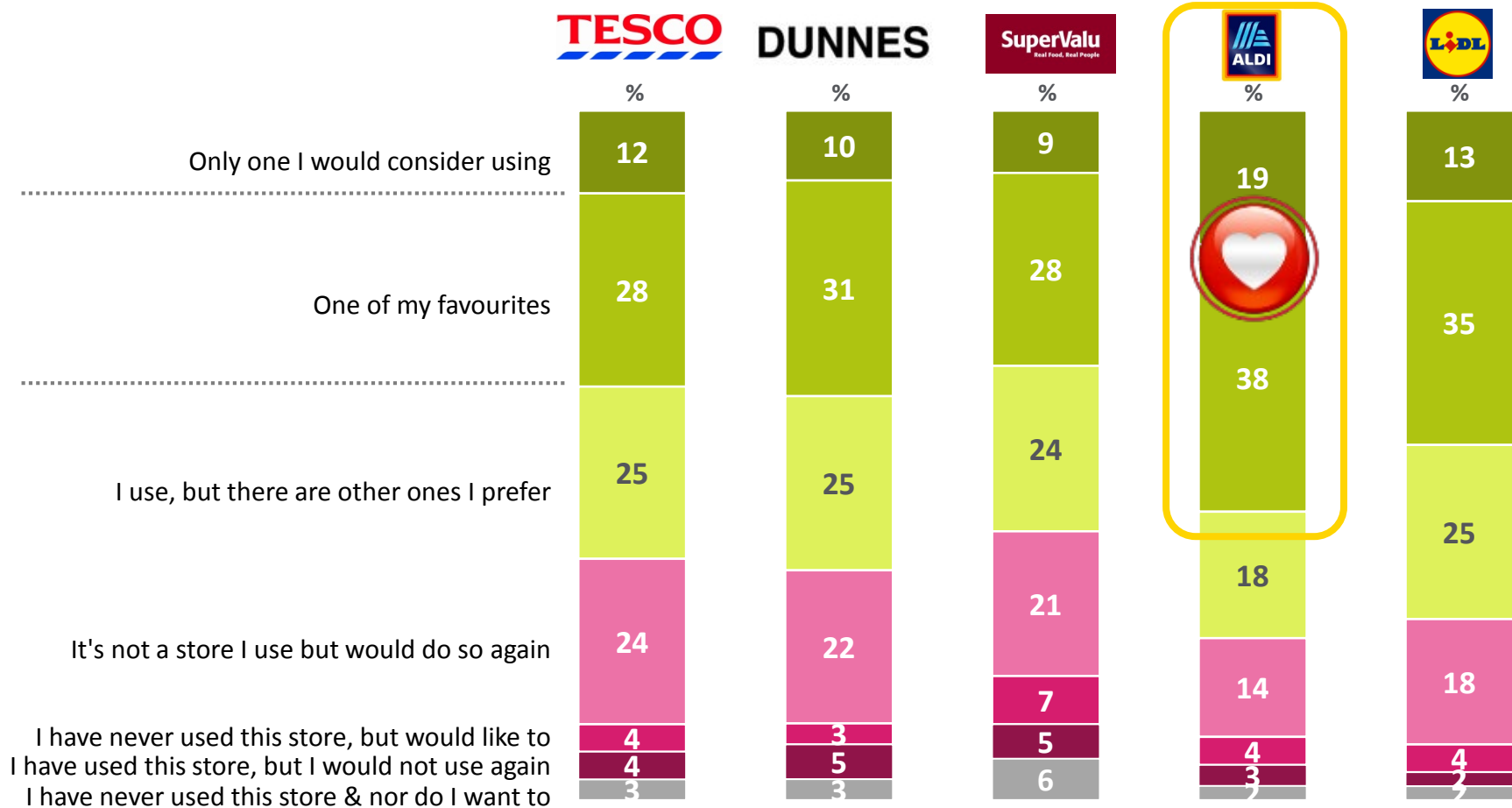
Q.1 Are you personally or jointly responsible for all or most of the grocery shopping in your household?

Source: B&A Retailer report 2018

J.9580 | B&A Sign of the Times | 2019

The emotional relationship belongs to Aldi

Store used most often



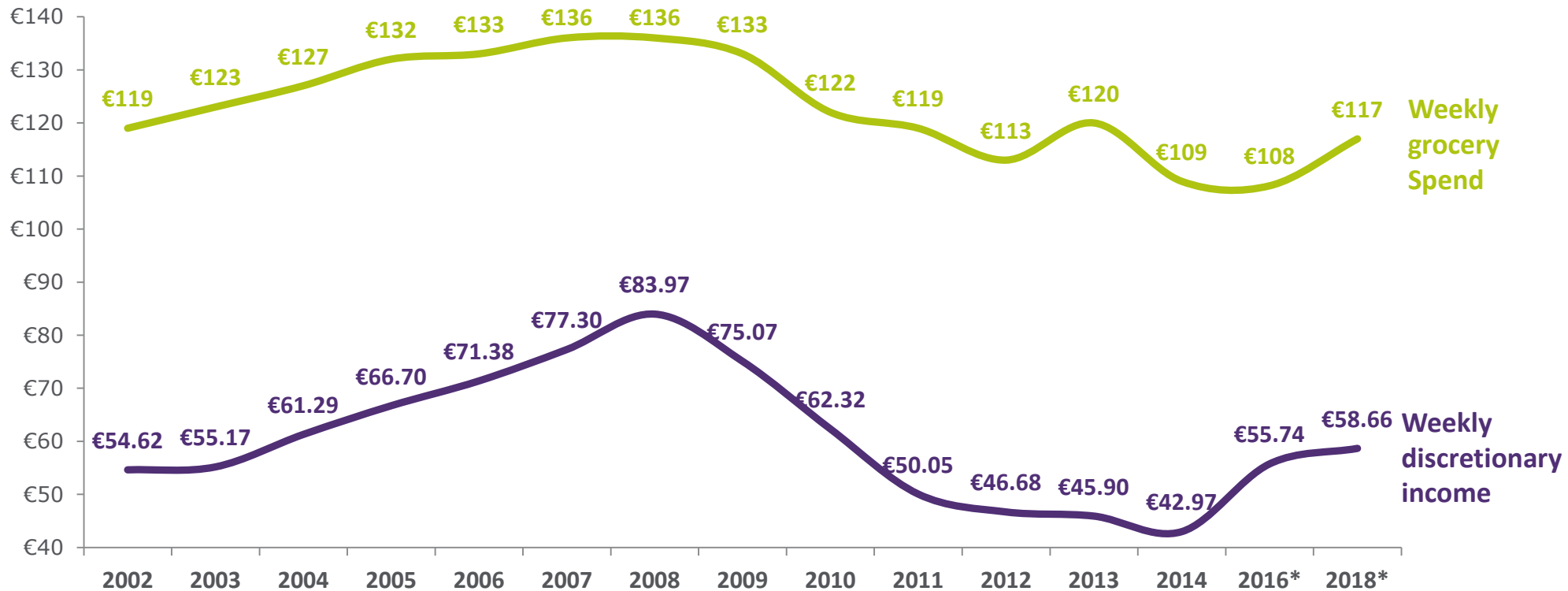
Base: All grocery shoppers (623)

33 ? Q.7 I'd like to now talk to you about grocery stores. Let's start with(ROTATE ORDER OF MENTION OF EACH OF THE STORES IN GRID). Which of the following statements best describes your view of this (STORE) .

Source: B&A Retailer report 2018

J.9580 | B&A Sign of the Times | 2019

Perceived affordability



*July 2016
**April 2018

Base: All grocery shoppers (623)

34 ? Q.9 In a normal week nowadays how much do you spend on your total grocery shopping each week, – even a rough estimate will do?

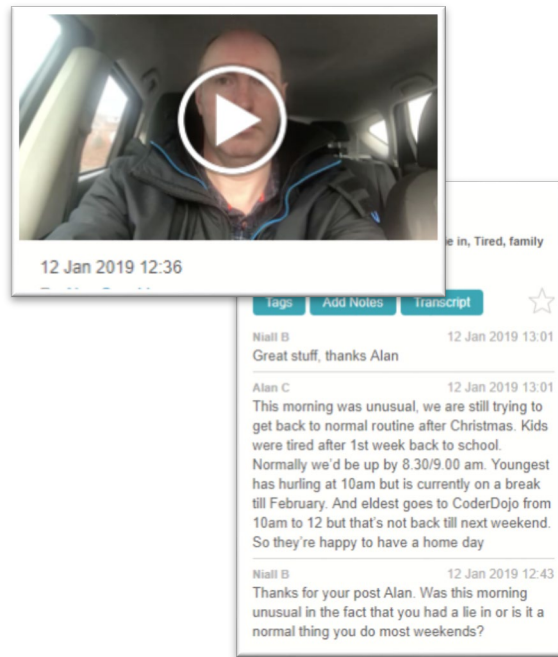
Source: B&A Retailer report 2018

J.9580 | B&A Sign of the Times | 2019

My Story

Life stories

1 Video, text and dialogue



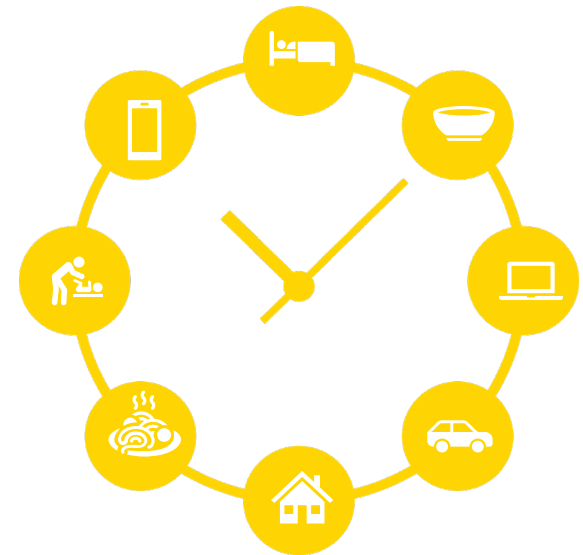
Participants upload multiple times per day based on scheduled reminders and prompted real time dialogue from moderator.

2 Analysis



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

3 Output

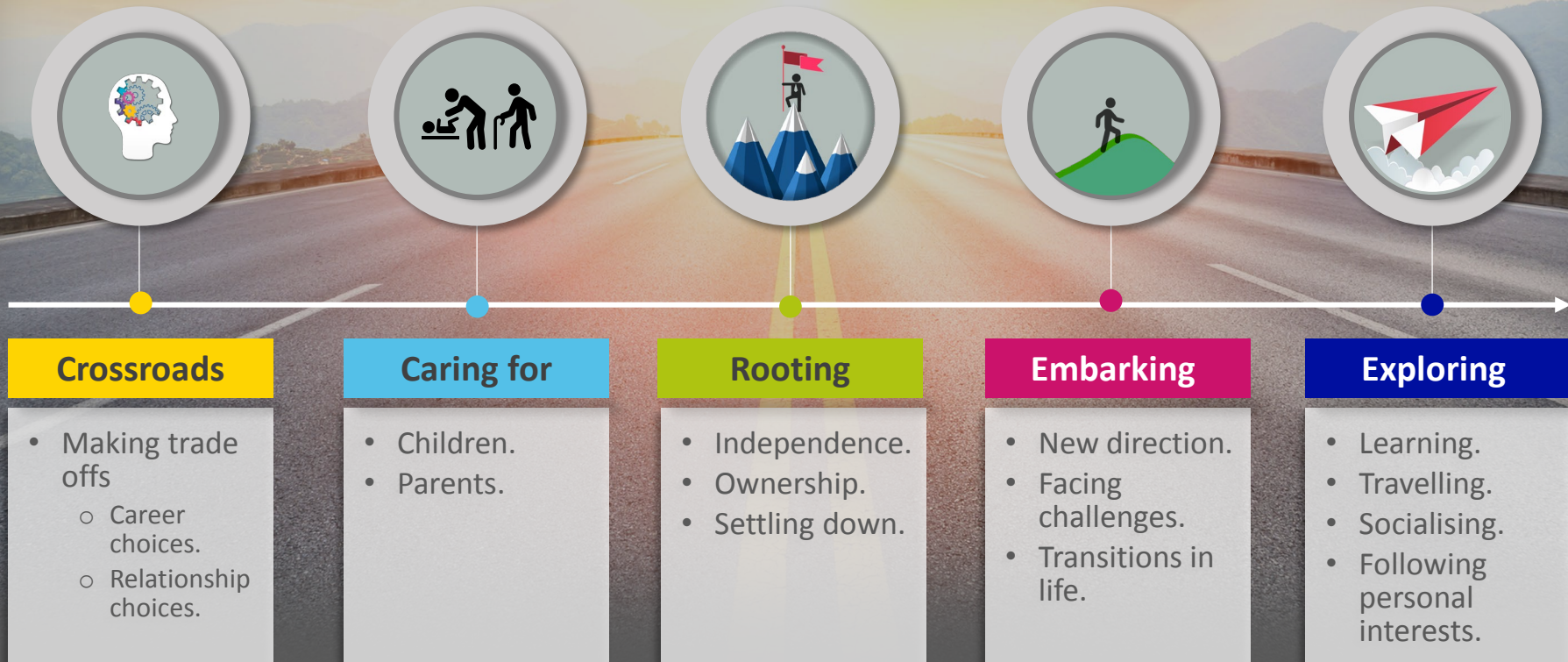


Distilled insights, and themes which reflect a true reflection of participants lives. Brought to life with rich media elements.

Our life story has common chapters



How we explain our life to each other has common themes





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.



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"*.



Culture

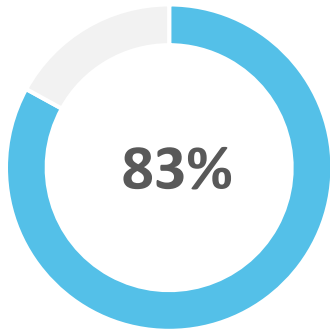


Guilt and lip service

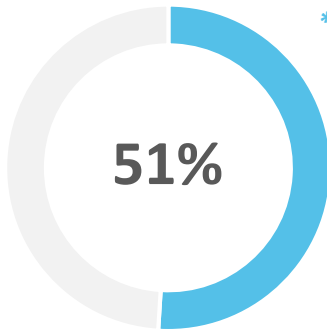


- There is a growing awareness of the need to be sustainable:
 - ❖ Despair about plastic on the ocean/in stomachs of whales
 - ❖ Relabelling bottles, 'single use plastic'.
- But behaviour change is at a modest (mainly middle class) level as yet:
 - ❖ Loose fruit over pre-packed
 - ❖ Reusable coffee cups (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.

Balance seekers

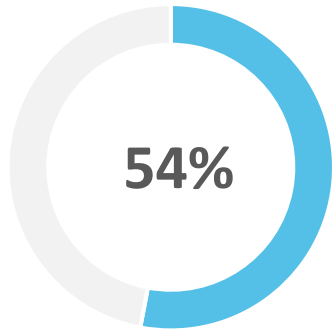


- In a time pressed world there can be a strong desire to achieve **balance**:
 - ❖ Reclaiming peace of mind.
 - ❖ Finding 'me time'.
 - ❖ Valuing downtime/playtime.
- There is often a link made between physical activity and mental health.
- Many feel they must **assert their right to rebalance**
 -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



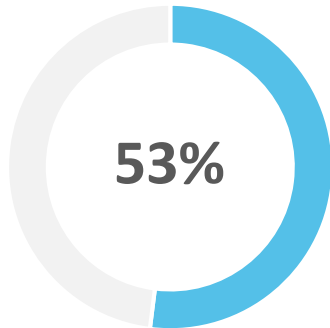
Which Ireland do you see?

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



54%

Pride in same sex marriage result



53%

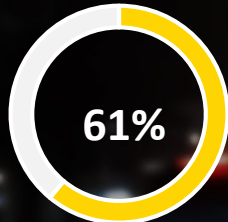
Neutral or disagree we are losing Irish identity in face of foreign national influx



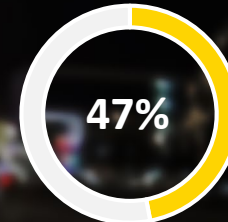
There is a 'progressive' outlook on important social issues with significant part of our society.

Which Ireland do you see?

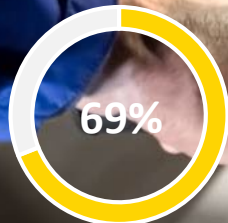
But change is not for everyone....



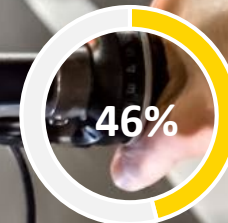
**67% for over 55s
Everything changes too quickly*



**54% for over 55s
Losing identity in face of foreign national influx*



**56% for under 25s
Society too politically correct*

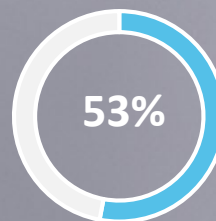


**37% for under 35s
Neutral or no pride in same sex marriage result*

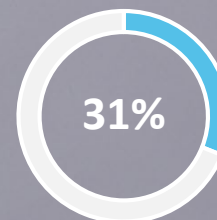
Nearly half of us are uncertain about recent changes.

Which Ireland do you see?

*And modern life
can be tough.....*

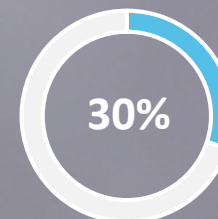


Find pace too hectic

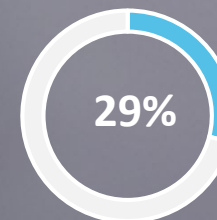


*Work life balance is
poor*

Base: All Adults +16 working (587)



Feel stress

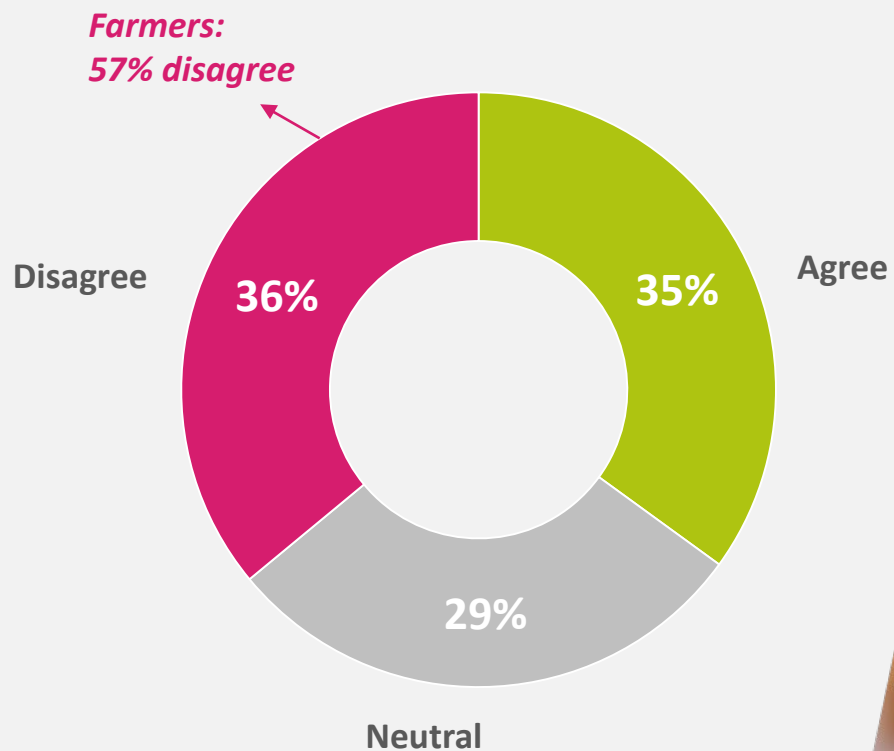


Tired all the time

A significant proportion are feeling the pressure of modern life.

Which Ireland do you see?

Religion does more harm than good

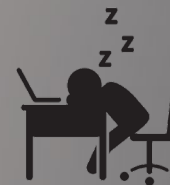
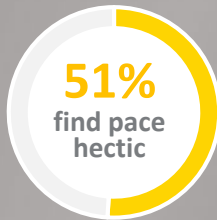


We have deeply divided views on religion

Which Ireland do you see?



*32% for under 35s



“

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.



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

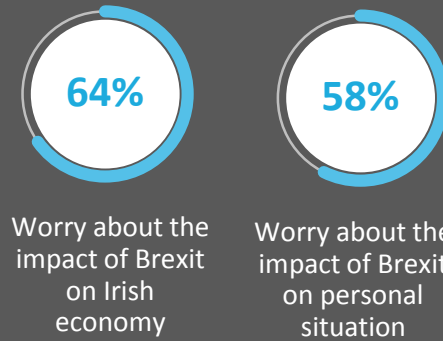
Balance seeking

Which Ireland do you see?

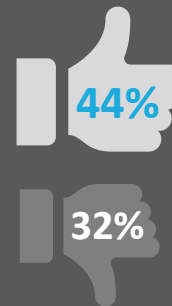
Household financial situation



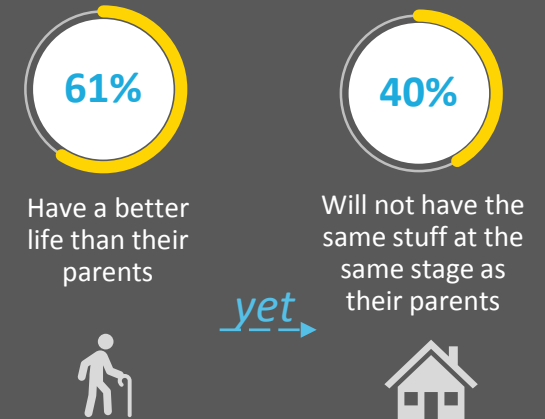
Brexit concern



Not all benefit from economy



Shifted milestones



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

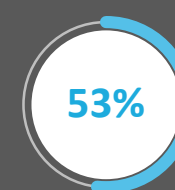


42% **Me Too**
Feel *Me Too* has gone too far
45% for men

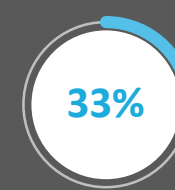
Are we moving too fast?



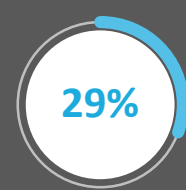
Feel everything is changing too quickly



Find pace hectic



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



Tired all the time

Thank you.



RESEARCH
& INSIGHT

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Delve deeper