



RESEARCH  
& INSIGHT

# Sign of the Times 2020

Prepared by B&A



@banda\_ie



behaviour&attitudes



behaviour&attitudes



info@banda.ie



Tel: 01 205 7500

[www.banda.ie](http://www.banda.ie)





## Contrast Groups

- Six focus groups which included two 'contrast groups' (Pushing insight further via exposition to other views/challenges).
- We contrasted on
  - ❖ Age
  - ❖ Social class
  - ❖ Attitudes to Irish identity
  - ❖ Attitudes to climate change.



## Ethnography

- Four x 2-3 hour in-home sessions.
- A 'slice of life'.
- Interviews and 'small data' collection in their homes.
- Included range of social class/ location/non-native Irish/returning emigrant.



## Consumer challenges

- We set sustainability related challenges for twelve respondents.
- Watched this progress via our digital ethnography.
- Longevity approach in which we 'checked in' two weeks later with respondents to see the success of behavioural change.

*Qualitative research was conducted between the 22<sup>nd</sup> January and 12<sup>th</sup> of February 2020*



## Face-to-face survey

- Face-to-face surveys.
- 1,003 interviews conducted nationwide by B&A's experienced and professional fieldforce.
- Nationally representative of the Irish population.
- The fieldwork for this study was conducted between 2<sup>nd</sup> and 14<sup>th</sup> January 2020

## TechScape

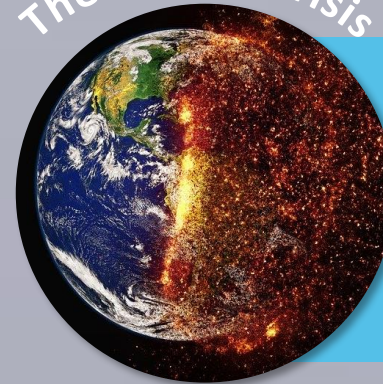
- TechScape is conducted on our face-to-face CAPI Omnibus amongst a fully representative sample of 1,000 adults aged 16+ years.
- The sample is stratified by age within gender by town size across 63 sampling points nationwide. An overall socio-economic status quota is also applied.
- As such, the sample is fully representative of all Irish adults, and not limited solely to the online population.
- The fieldwork for this study was conducted between the 18<sup>th</sup> and 29<sup>th</sup> January 2020.

## The state of the nation



- Flying high (on paper)
- Stark differences between appearance and reality
- The 'lose, lose' situation
- A vote for change

## The climate crisis



- The visual impact
- Behaviour change
- The struggle to motivate
- Brand leaders

## Technology



- Tech is ever more pervasive
- Falling out of love
- More is less
- Yearning for simplicity
- Negotiating the rules of the game



**But first ...  
Covid-19 The Game Changer**

We conducted fieldwork for Sign Of The Times in Jan/Feb 2020.

We never anticipated how quickly our reality could change.



**29<sup>th</sup> Feb:** First case of Covid-19 diagnosed in Ireland

**15<sup>th</sup> March:** 292 cases, 2 deaths, schools, universities, childcare settings, pubs, playgrounds, stores closed. Social distancing measures in place. Stock markets plunging. Gathering/Celebrations/festivities cancelled.

And this is the ‘calm before the storm’

Our thinking on some of the key issues we’ll be reporting on has already shifted radically

Technology is a godsend when we can’t connect physically

There’s nothing like a global pandemic for reducing one’s carbon footprint

We have renewed appreciation for Varadkar the statesman

We’re putting a lot of faith in our collective effort to make a difference

Our colleagues in China are observing what happens as we come out of the crisis. They’re telling us that Covid-19 is likely to change consumer behaviour permanently and profoundly.

## The coming weeks and months are a crucial time for brands



People are in a state of shock having to make new decisions and change their behaviour like never before.

They are being taken out of their automatic rhythms and hence engaging with brands at different levels.

It is crucial they engage in the correct way. It is essential that brands don't 'disappear' during this time of need.

Those that are present will be stronger for it, when the 'new normal' emerges.

**It's never been more important for brands to stay in tune with consumers' needs.**

# As an adjunct to SOTT 2020, we will be researching consumers 'lockdown' behaviour



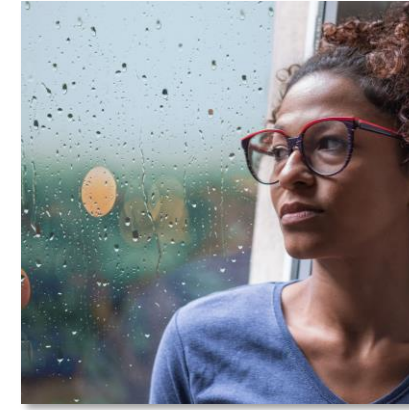
Via diaries on our digital app



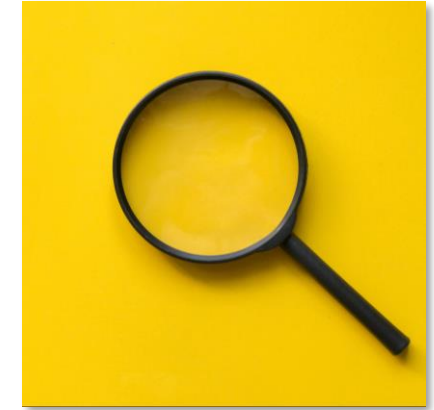
Across the population; range of age, lifestage, social class



Monitoring how they feel about the situation as it keeps unfolding



Exploring what is "life on lockdown" really like



How are behaviours changing and evolving to cope with the crisis?

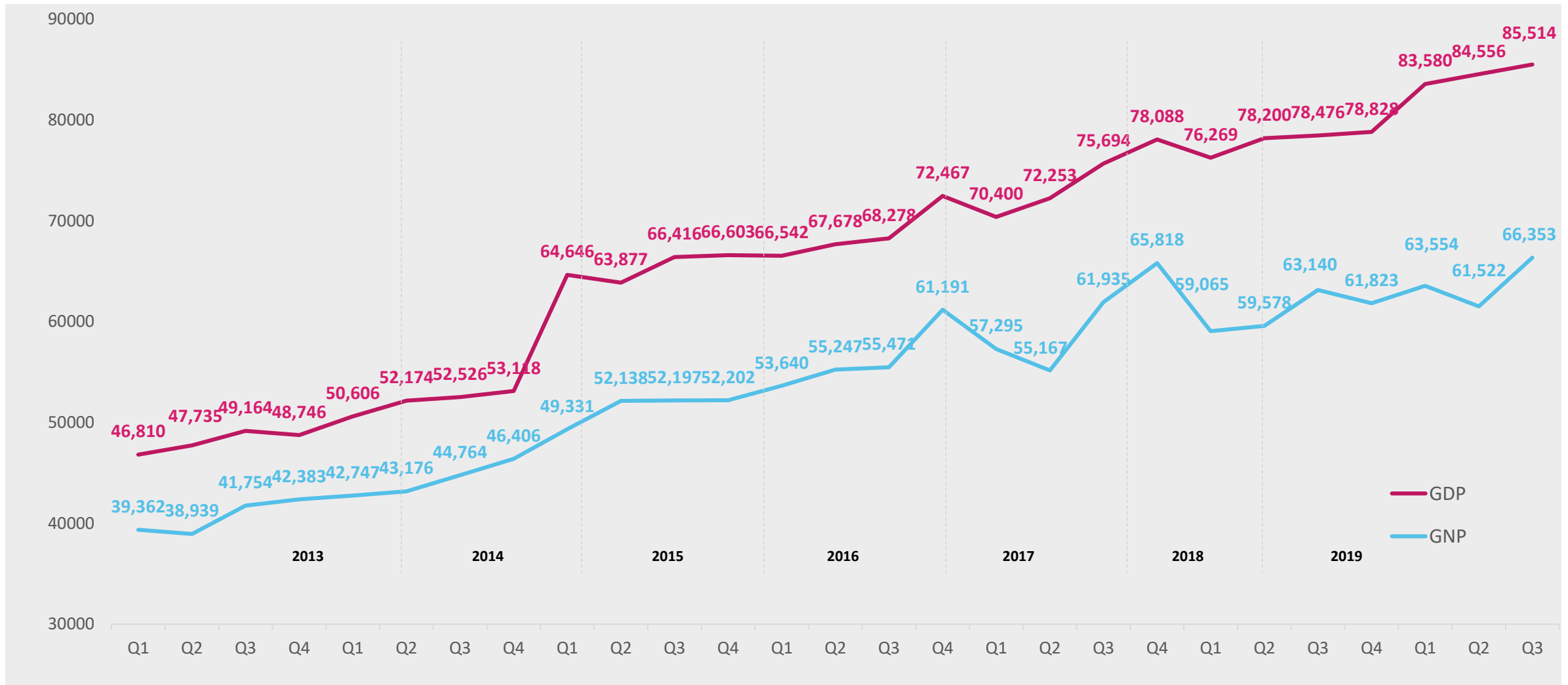
We'll be reporting weekly/fortnightly on how the country is coping. Watch this space.





State of the nation

# On paper, the situation looks strong. GDP & GNP continue positive trends.



\*GDP and GNP data correct as of November 2019

Source: [www.CSO.ie](http://www.CSO.ie)

Quarterly National Accounts

QTR 4 2019 data not yet available

# Annual employment and live register levels remain positive



## The Live Register

**-7.6 %**

Overall Change  
vs. Jan 2019



**79,150**

**-8.5%**

vs. Jan 2019



**104,605**

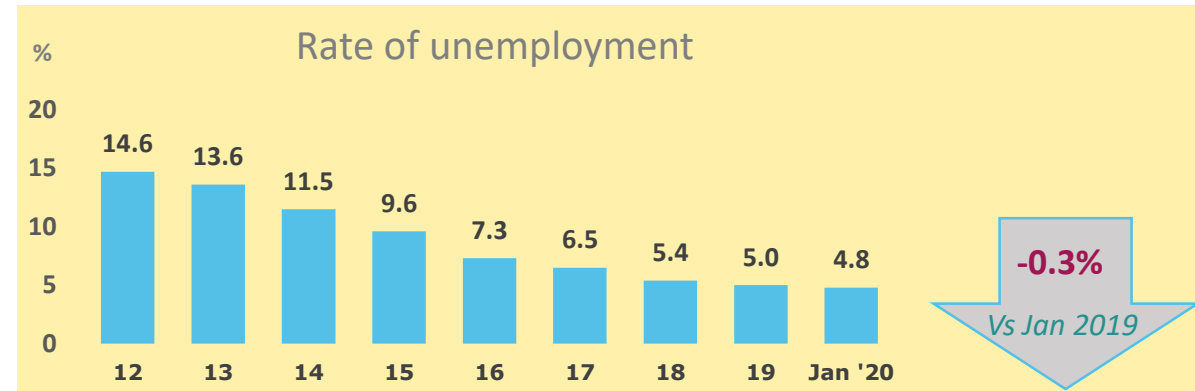
**-7.6%**

vs. Jan 2019

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



## Unemployment in Ireland



**Current Rate of unemployment**  
(vs. 5.1% in Jan 2019)



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

# Yet there's a stark difference between

## How it looks from the outside



## And how it feels on the ground



# Foundations of civil society feel shakier than ever

Feels like it wouldn't take much for it to come **crashing down**.

- Changes in EU tax regulations
- Global strategies of some of the big multinationals
- Recent issues with insurance premiums/childcare provision
- Crime/drugs related explosion.
- Major healthcare crisis.



No evidence of a **back-up plan**

An underlying **sense of anxiety**, with many feeling that **we're living on the edge**

But the spoils have barely filtered down



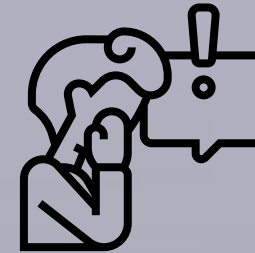
Thriving

We should be here



Surviving

But the majority of the middle class feel they're here



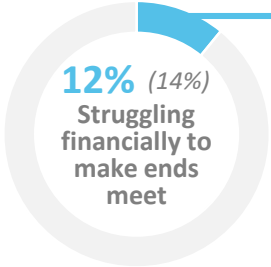
Struggling

The majority of the working class are further away again

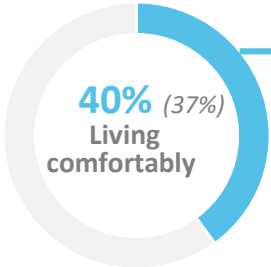


Failing

And unacceptable numbers over here



Equates to 495,000 at population level  
More blue collar and those living in Conn/Ulster



More ABC1 & Dublin

( ) = 2019 data

**Over the last 12 months there has been little change to consumers financial stability as a quarter of all consumers continue to feel they have less money in their pocket now than 12 months ago and half a million claim they are struggling to make ends meet.**

# This feels like a 'squandered' recovery. Where did it go?

Multi-nationals' tax breaks



Excessively generous packages for TDs/top civil servants/consultants

Contractors for the National Children's Hospital

Expensive mistakes by the government (printer)

Industries that avoid paying taxes

Commercial landlords

Servicing our national debt (thanks Fianna Fáil)

Propping up the banks

**Incompetency and greed has made the situation worse for ordinary people**



# Traditional middle class aspirations are requiring more and more sacrifices to achieve

## I expected

To have a good career

To save and buy a house

To go back to work when I had kids

To trade up to a 3-bed semi for my growing family

To support my kids through third level

To be involved in my grandchildren's lives

To have an enjoyable retirement

## But I didn't think

I'd be tied to Dublin forever

I'd have to live with my parents for 2 years to get the deposit together

The cost of childcare would mean I am virtually 'working for free'

I'd have to move out 20km and commute an extra 2 hours a day

They'd still be living at home at 34

I'd be supplying childcare for free

I'd have to work to 75 to do that



Growing numbers realising they won't achieve these markers at all.

## Against this backdrop, rejection of the status quo shouldn't come as a big surprise

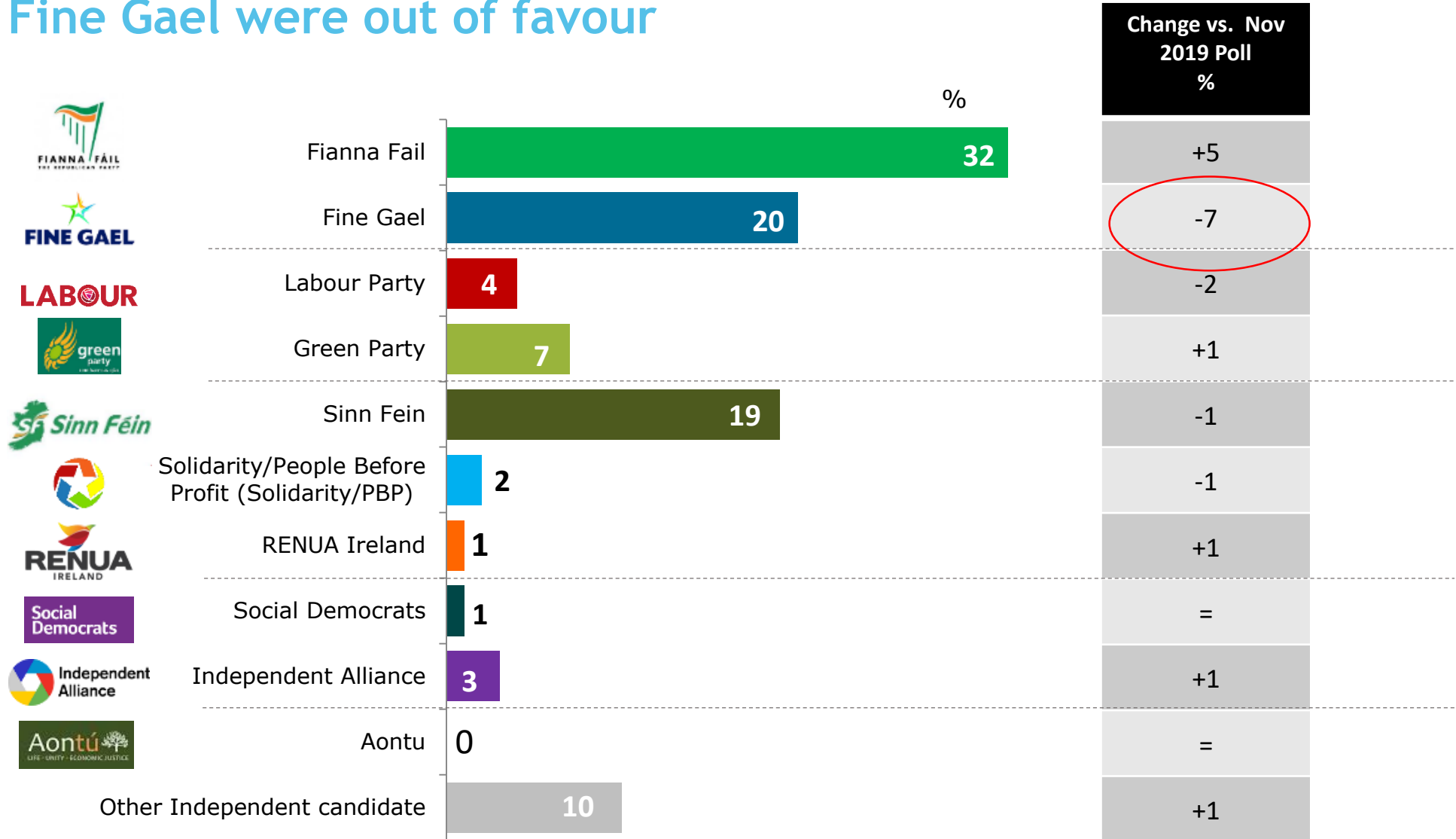
- The results of the 2020 General Election represent a vote for change.
  - While it is commonly being described as a 'protest vote', it represents much more than that.
  - By definition a 'protest vote' is a once-off demonstration, driven entirely by emotion, with no rational component.
- Sinn Fein securing the largest share of first preferences represents a fundamental shift in the Irish political landscape – which (up until now) had been dominated by Fianna Fáil and Fine Gael since the foundation of the state.
- While undoubtedly a highly emotionally charged vote, this was not a 'blind tantrum'.



**POLLING  
STATION**



# We knew Fine Gael were out of favour



The Sunday Times/B&A poll conducted before the General Election campaign began registered a 7% drop in support for FG. Most of this lost support had migrated to Fianna Fáil and at this point, it looked like they would win, and Michael Martin would be the next Taoiseach.

## But what led to the Sinn Féin support surge?

Both **FG & FF misread the mood of the electorate** – rather than demonstrate how they would bring about **societal change**, Martin and Varadkar focused on the **economy & Brexit**.

Both appeared **increasingly out of touch with societal issues** – a tangible demonstration of this was Leo Varadkar's shifting of blame for **the removal of a homeless person** sleeping along the Grand Canal using **a heavy digger**.



Meanwhile, **Mary Lou McDonald and Sinn Féin** had clearly learned from previous election mistakes and **ran a thoughtful and upbeat policy-driven campaign** – they had a clear and coherent policy on retirement for example.

Her **exclusion from the televised leaders' debate** highlighted FF & FG's **'boys' club' image** – they anticipated a post-election coalition between their two parties, and it began to look like they were a **'package deal'**.

**Sinn Féin** began to represent **an alternative to this 'status quo'**.



**The climate crisis**

# The visual manifestation of environmental damage is what hits us most strongly



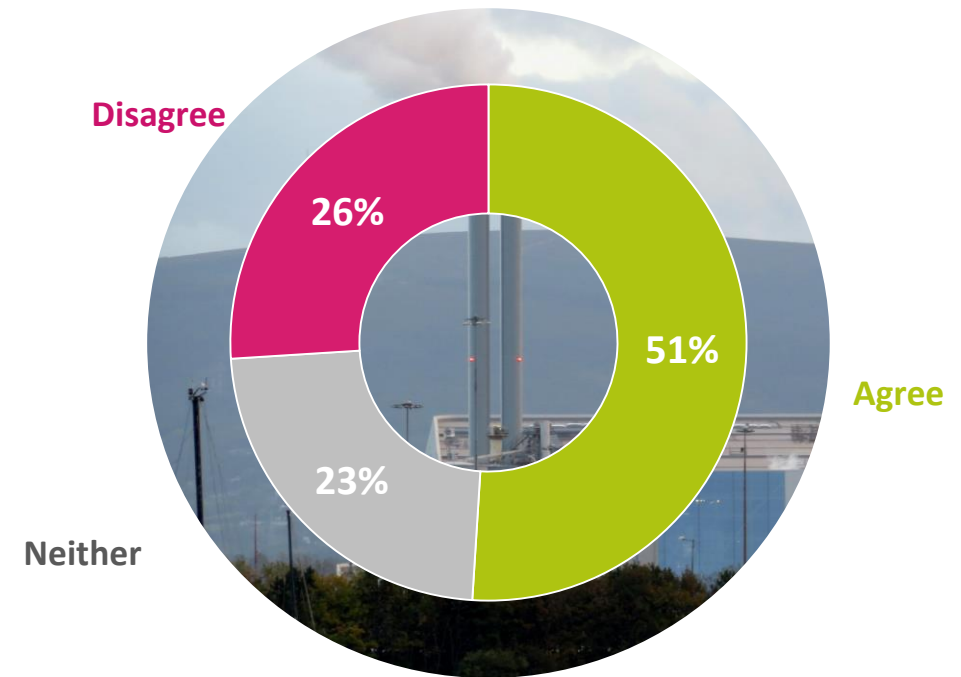
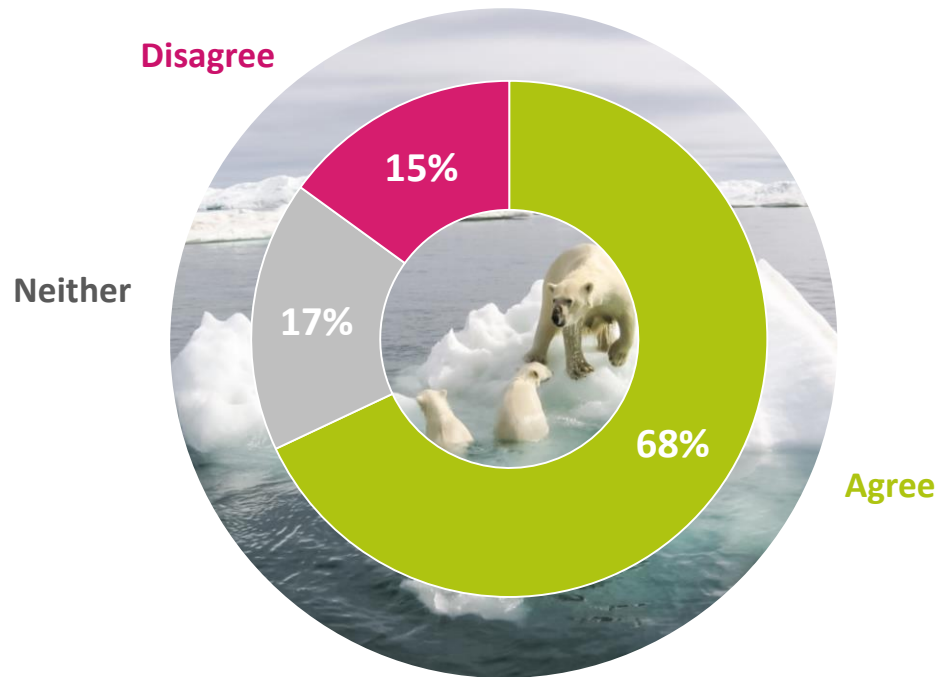
Appears to be most effective in bringing people to the cause

# Concern about environment issues is significant

Base: All adults 16+ 1003

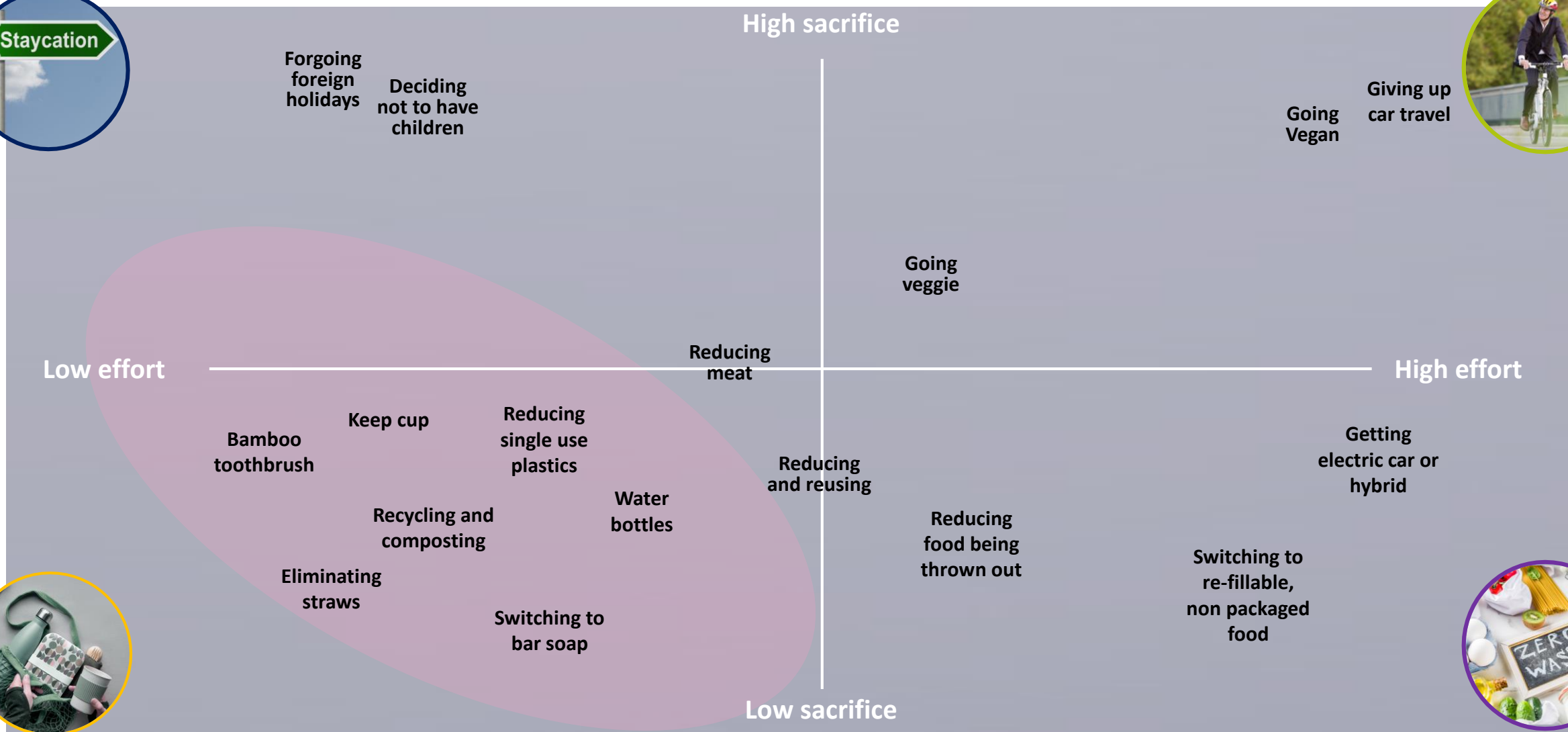
**7 in 10** consumers are concerned about environmental issues...

...and half believe environmental issues have a profound effect on their life



ABC1s and those living in Dublin claim the highest level of concern regarding environmental issues

# The vast majority have made changes in the last few years for environmental reasons



However, most of these are in a 'low effort, low sacrifice' quadrant



# There's a huge gap between what we can do at an individual/micro level and what's happening at national/macro level

## Daithí from Cork



- Has made a range of low effort/low sacrifice changes.
- Worried he's not executing them correctly or if they're even useful
- Feeling guilty that he's not doing more.
- Concerned about the future but feeling helpless and limited.

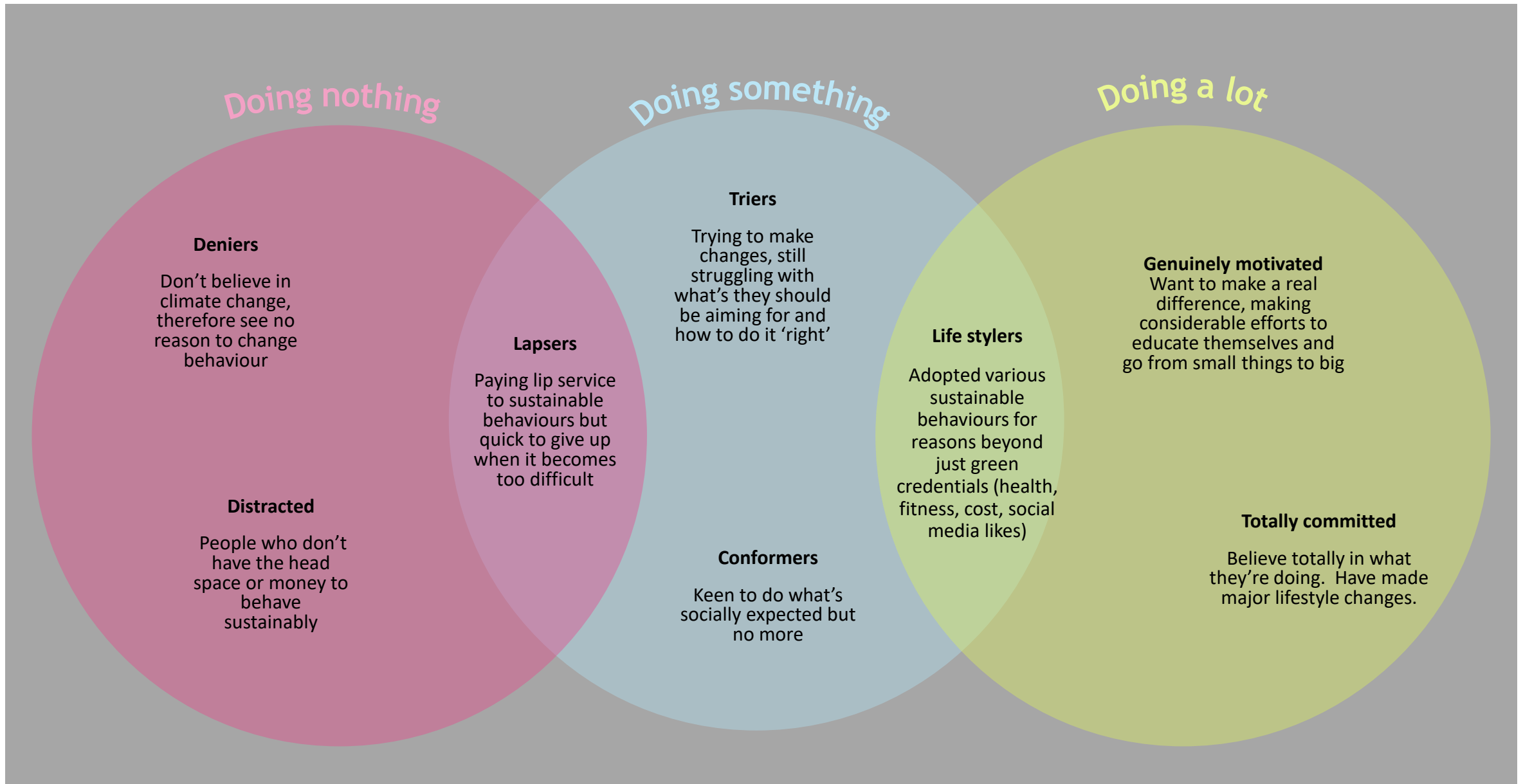
## Ireland as a whole



- Most car dependent nation in Europe.
- Beef/dairy farming is a huge industry for us.
- Feels like needs of big businesses will always be prioritised.

Very easy for individuals to become disillusioned

# We've identified a range sustainability 'personas'



# Individual effort feels like the smallest drop in the ocean

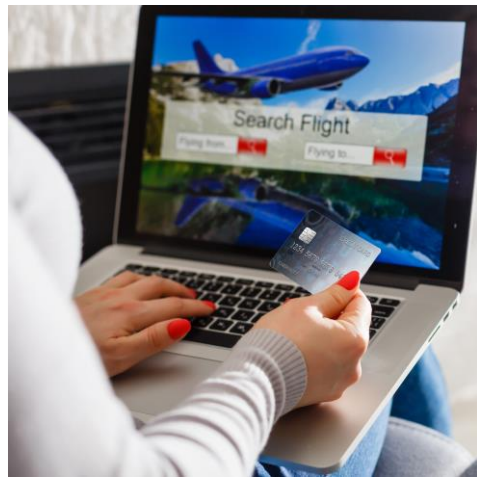
But almost nothing is being done to foster a sense of a collective effort that could make a difference.

The discourse is all about pitting the individual against others

Individual  
VS  
Individual



My friend goes on about how she's cut out all plastics, but I know she takes 4 flights a year



Individual  
VS  
Big Business



Why should I do anything while Coke won't phase out plastic bottles



Individual  
VS  
Government Policy



What's the point in my recycling when China's putting all their plastic in the sea



# The brands that are being lauded for their sustainability are those promoting initiatives that are ...

Visual & Tangible

Simple

Collaborative

Lucrative for the consumer



- Recycling stations in-store
- Solar/green energy
- EV stations in car parks



- €100 incentive to go paper free



- Garment recycling (with vouchers)
- 100% sustainable cotton by 2020



- Parley initiative, shoes made from recycled plastic bottles



# The following approaches would help in driving more sustainable behaviours among consumers



## Fostering more collaboration and a 'we're in this together' spirit

**Incentivisation:**  
Sustainable behaviours should be financially advantageous

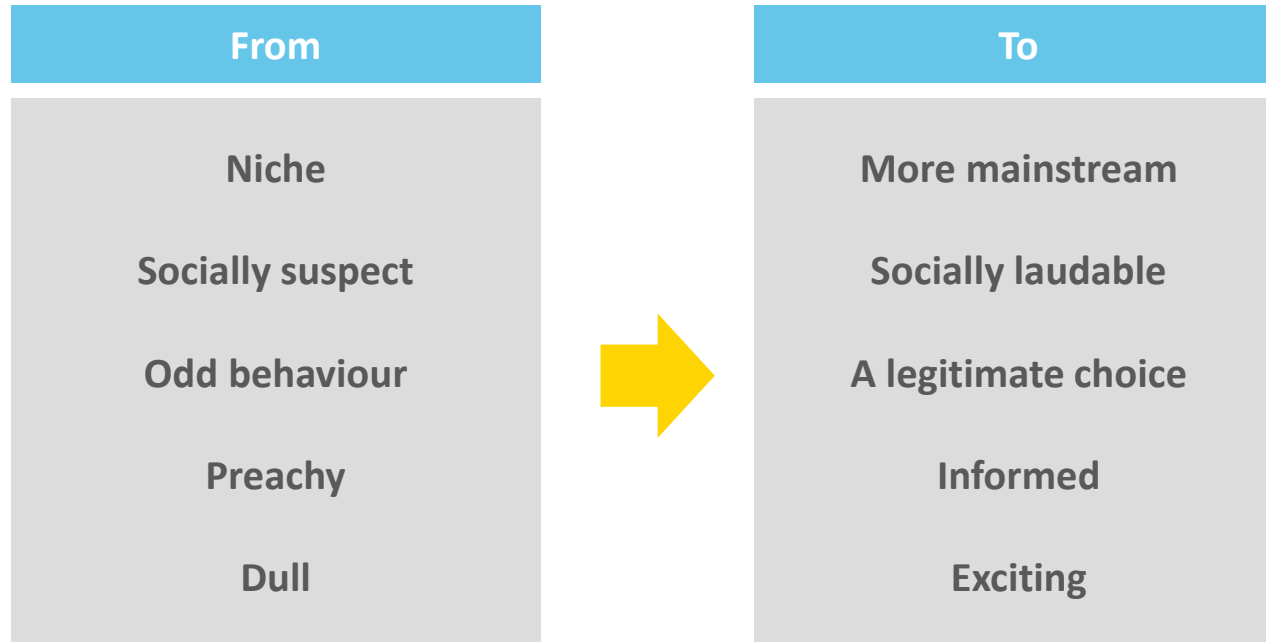
**Clear direction:**  
On the 'right' way to do sustainability

**Recasting small changes:**  
As the catalyst for bigger ones, rather than just pointless

**Improvement in infrastructure:**  
Certain green behaviours need significant support

Helpful 'nudging' in the right direction

## *Veganism has gone*

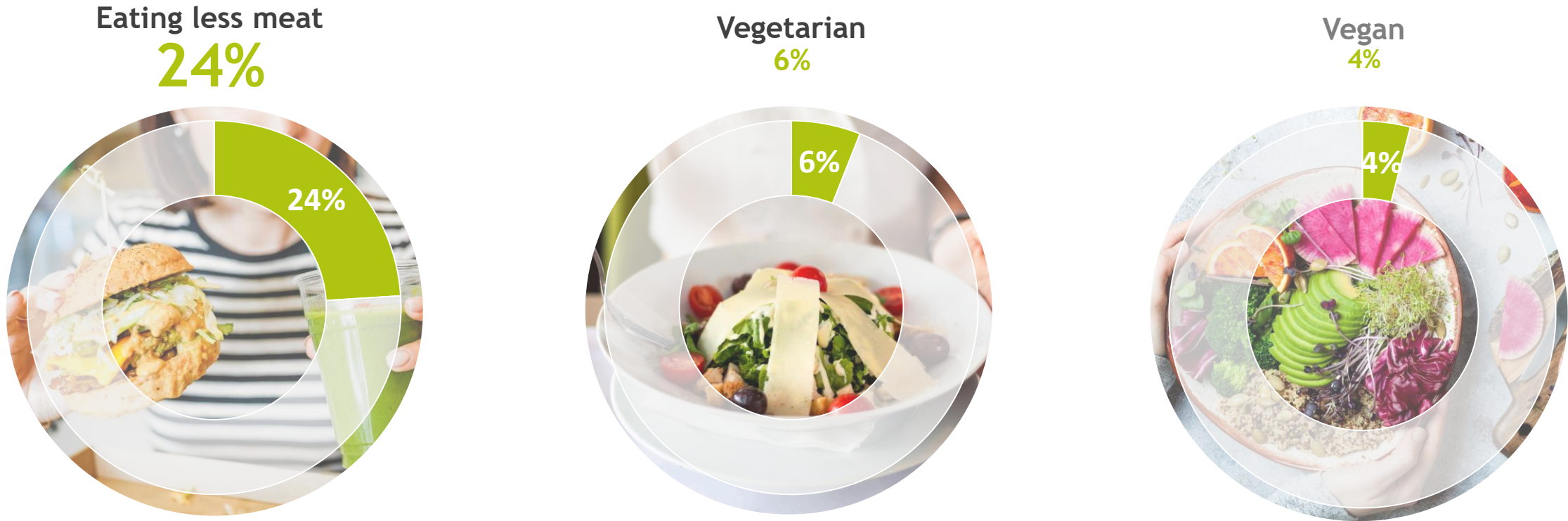


**It's taken a lot to shift away from longstanding cultural preferences, but a wealth of factors have worked together to move the dial**

- Environmental consciousness
- Animal welfare concerns
- Health matters
- Explosion of choice
- Advocacy of celebrities, sportspeople, influencers

# The positive shift towards veganism/vegetarianism has been more attitudinal than behavioural so far

One quarter of the population classifies themselves as a flexitarian, while just 4% claim to be a vegan



Any eating less meat, vegetarian or Vegan: 27%

Almost 3 in 10 consumers claim to be eating less meat, be a vegetarian or a vegan – higher among those living in Dublin.

# Terms like flexitarian give people a framework to 'dabble' in reducing meat/dairy consumption

## *Allowing them to ...*

### Reap some of the benefits

- Health
- Environment
- Welfare

### Bag some of the kudos

- Moral
- Social

### Limit sacrifices made

- Most still enjoy the experience of eating meat

*It doesn't have to be all or nothing to make a difference*

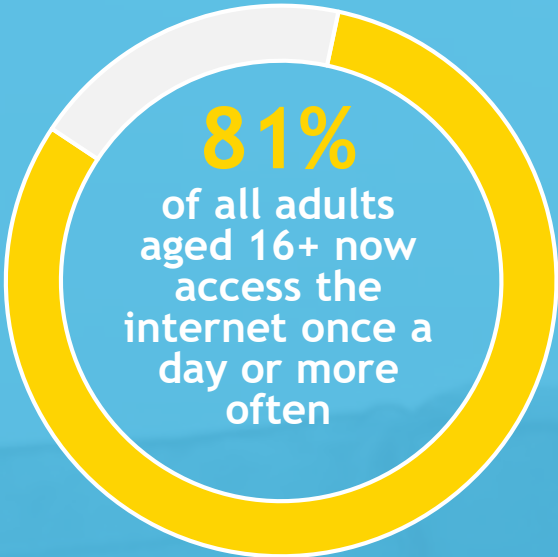




**Technology**

# Technology is an ever more pervasive presence in our lives

Base: All adults aged 16+ - 1,001

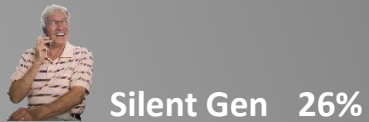


**26%**  
Of those 74 yrs+ (Silent Gen) now access the internet once a day or more often.

11% of population never access the internet



## Generations

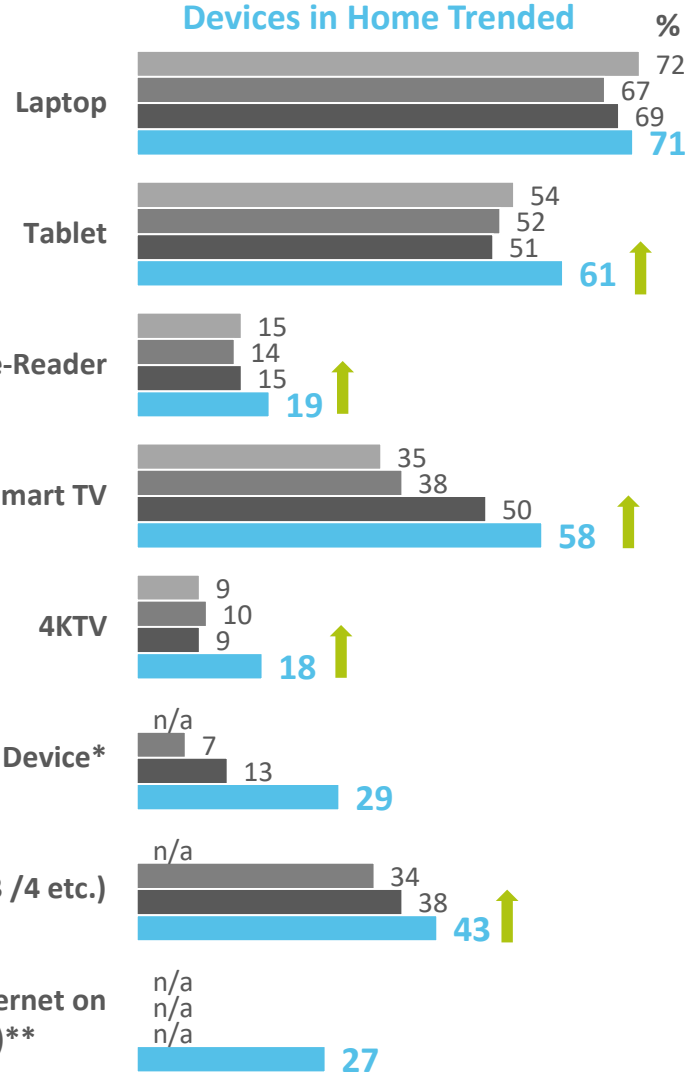


# The surge in digital devices continues

Base: All adults aged 16+ - 934



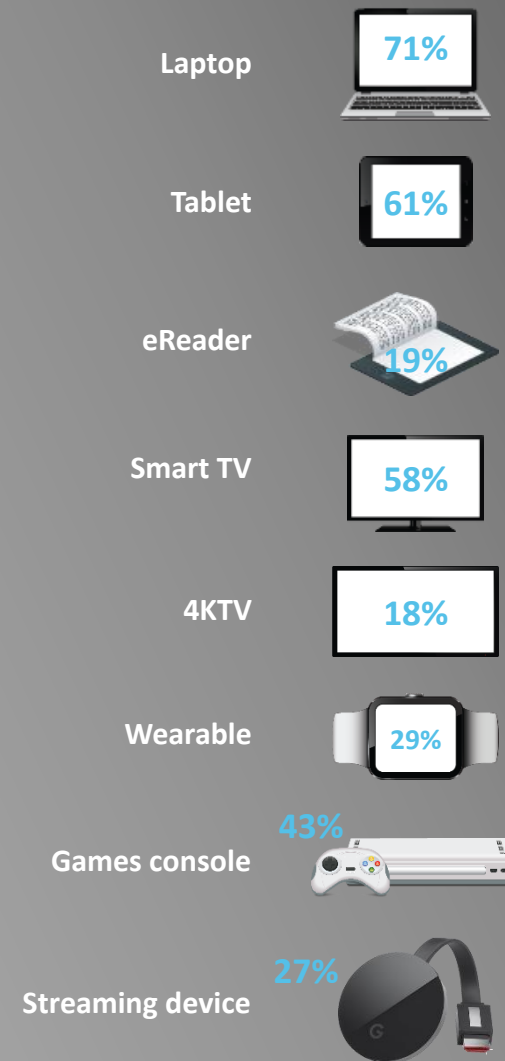
## Devices in Home Trended



Any Smart TV  
(Smart TV + 4KTV) =  
64%  
2,213,000 population

■ Jan-17  
■ Feb-18  
■ Feb-19  
■ Feb-20

## 2020 Totals





- While previously we spoke of the emotional benefits of technology and were ‘wowed’ by its entertainment value, we are becoming increasingly likely to talk about its functional necessity:

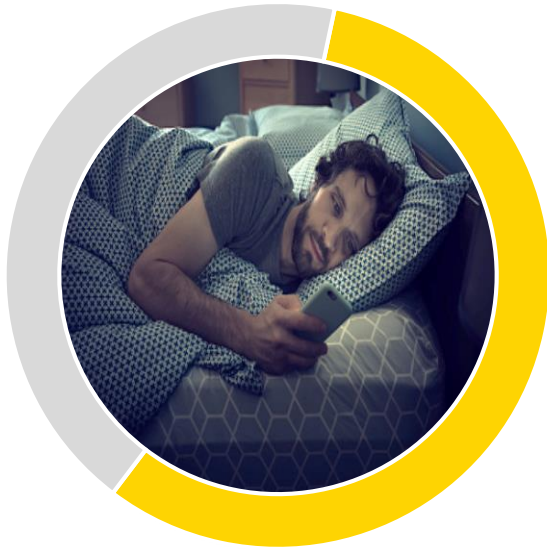
- ❖ Googlemaps
- ❖ Online banking
- ❖ Alarm clock
- ❖ Parking apps
- ❖ Work emails
- ❖ Calendars/diaries

And many more!

- We are also increasingly focussed on the negative impacts it has.
  - ❖ Have we fallen out of love with technology?

# We are 'always on'

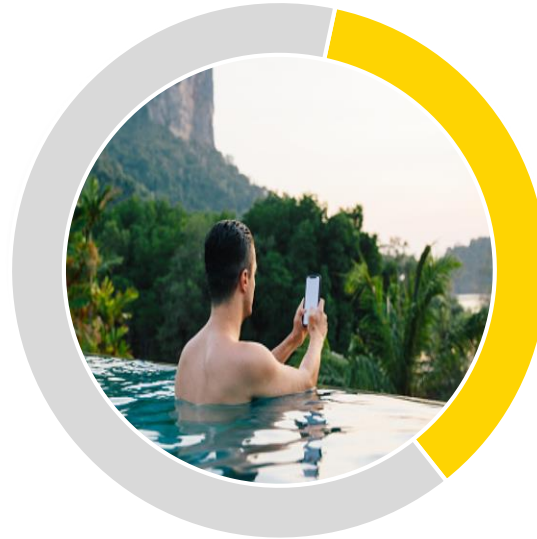
Base: All adults aged 16+ - 1,001



**57%** ↑ 11% vs. 2019

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

Base: All using social media



**36%** ↑ 13% vs. 2014

Often check work emails on holiday because they feel it is expected

Base: All working



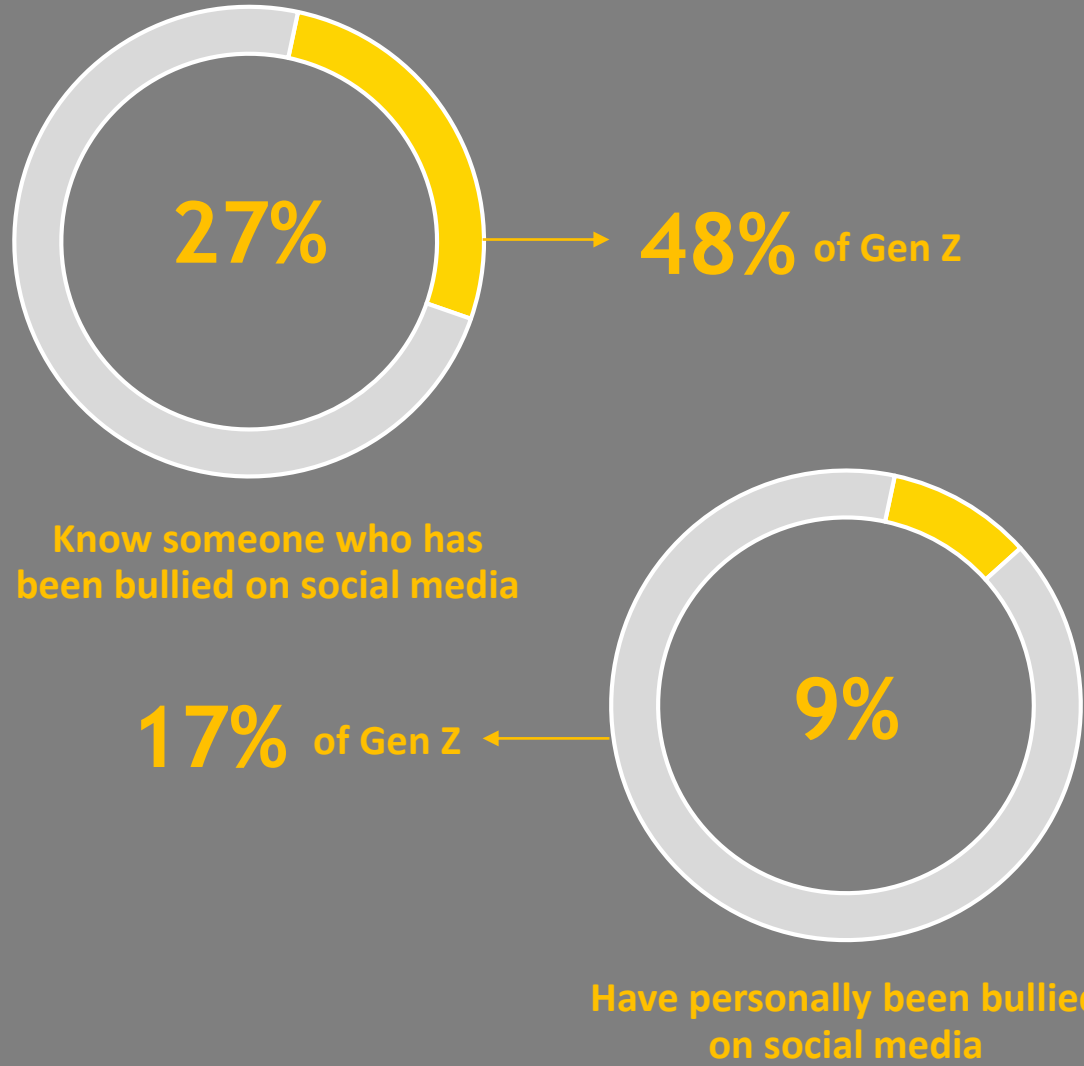
**25%** ↑ 9% vs. 2019

Find it hard to switch off in evening/weekends

Being constantly contactable means the conventional means of 'switching-off' are no longer sacred.

# And the dark side of social media is becoming ever more apparent

Base : Use Social Media Sites 708



## But despite all of this, we're hooked!

- We are now using our phones for almost everything.
  - ❖ Listening to music, podcasts, audiobooks, the radio, watching shows/films, mobile gaming, and the list goes on!
  - ❖ We feel unnerved when separated from them and even bring them to the toilet.
- Increasingly we feel a need to be distracted – at moments of boredom or 'empty time' during the day, we instinctively reach for the phone.
  - ❖ And often, one distraction isn't enough – gaming while listening to music, on Facebook while watching TV, etc.
  - ❖ We are almost at a point where we are unable to simply 'do nothing' and our ability to be 'present' is diminishing.

***And its not just the younger generations!***



40%

Can't imagine  
their life without  
social media

# We start to realise what we have been sacrificing as we become a slave to consumerism and technology



True appreciation of the natural world

Rest

Ability to delay gratification

The freedom of not being always 'on call'

Proper connection with our physicality and bodies

Ability to be bored

The art of conversation

Comfortableness with our thoughts

Patience

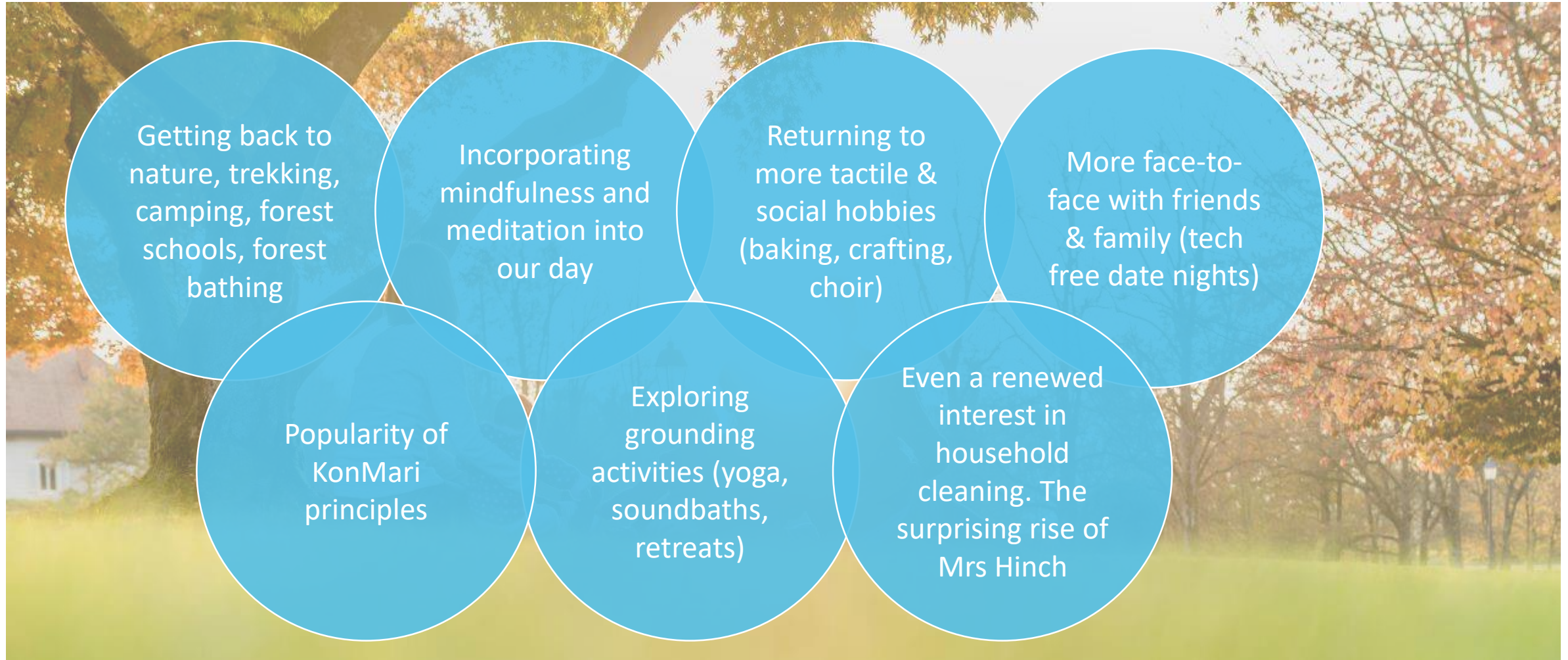
Old fashioned games and hobbies

Parents particularly quick to mourn this loss for their children.



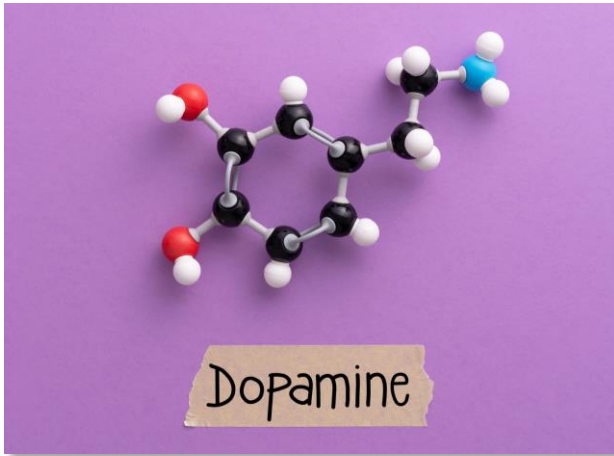
# There's a strong desire to return to a simpler way of living

And, we see increased focus on more low tech/anti-consumer behaviours.



## But we are being set-up for failure

We all **know** the negative effects of our consumerist/tech-centred world.  
Yet, we find it immensely difficult to wean ourselves off



### Biologically, we are primed

Dopamine hits that we get from SM likes,  
hunting out a fast fashion bargain.



### Societally, we are conditioned

To consume, spend, fill our lives with  
expensive tech.

As much as we try to push away, tech finds ways of pulling us back in.

# We don't want to divorce tech entirely



But as with any dysfunctional relationship, we need to stand up for our own interests and actively manage it.



Much as we've done for food: We've developed whole traditions, routines, etiquette, taboos to manage our consumption (though we did this over hundreds of thousands of years).

**What should these tech hygiene guidelines be?  
And how should we enforce them?**

# Thank you.



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& INSIGHT

*Milltown House  
Mount Saint Annes  
Milltown, Dublin 6 - D06 Y822  
+353 1 205 7500 | [www.banda.ie](http://www.banda.ie)*

# Delve deeper