

Sign
of the times
2012



Introduction

- This is the third annual **Sign of the Times** report from Behaviour & Attitudes.
- Drawn from our observations in hundreds of consumer research projects over the last year and a series of group discussions in the last few weeks, it attempts to capture the current zeitgeist in Ireland.
- We have also included some recently completed quantitative survey output from the B&A Barometer.
- As Ireland's largest independent research agency working in the field for 25 years, we have the experience to provide an analysis of what is really preoccupying the population in early 2012.

Research structure

No.	Gender	Age	Lifestage	Class	Location	Criteria
1	Mixed	20-25	Student/Pre career	BC1	Dublin	Students and post 3 rd level but yet to start a career job
2	Mixed	20 -25	Student/Pre career	BC1	Australia!	Living Australia for 12 months+
3	Mixed	26-35	Young family	C1C2	Sligo	All central European (Polish, Czech, Lithuanian, etc)
4	Mixed	35-45	Singles/Family	C1C2	Limerick	All to have mortgages
5	Mixed	45-54	Family	C2D	Dublin	SME/Soho
6	Mixed	55+	Empty Nestors	BC1	Limerick	All to have less than 5 years left on their mortgage/paid mortgage off

A different focus this year with a group of New Irish in Sligo and an online extended group with Pre career Ex Pats currently living in Australia.

Global Events 2011



A year of dramatic events around the world, but increasingly people express a desire to focus closer to home.

Irish Events 2011



The Queen's visit brought a sense of history and with Obama in town there was more positive energy in the country. However at times the presidential race seemed less historic and more soap opera.

Irish Politics

“Anglo Irish bank did more damage in a couple of hours than the IRA did in 10 years.”

“To think that a bloke off the Dragon’s Den could be considered to be president?”

“The Queen seemed like she was enjoying being here in Ireland because she couldn’t fake it for four days”

“Is Féidir Linn - and he’s right, that’s the attitude we need to have and he gave it to us in our own language.”

I thought ...,

Enda **Kenny** really

Stepped
up to
the mark



.... when

Obama

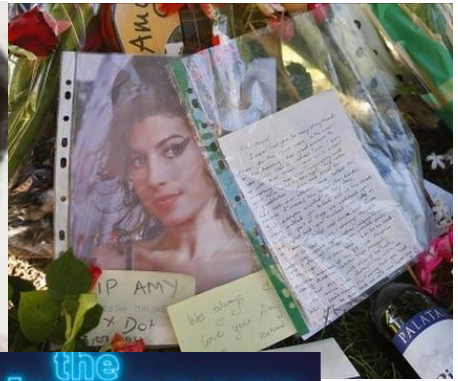
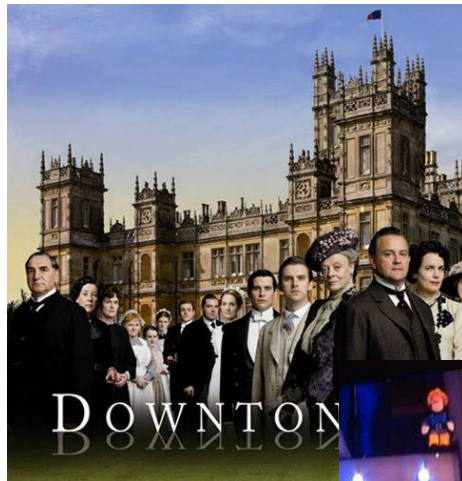
Was speaking straight
after him

And it really

**Brought up
the nation**

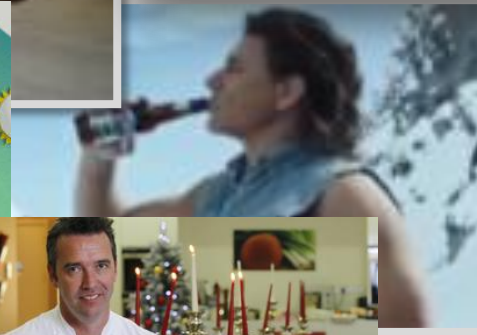


Entertainment 2011



There is a renewed fascination with aristocracy and royalty. In an uncertain world is comfort drawn from the more structured and ordered society represented by Downton Abbey and the Royal Family?

Memorable Advertising 2011



A strong year for Irish advertising, with local campaigns dominating recall. Strongest engagement with ads demonstrating irrepressible Irish wit.

The Fallout from Recession Continues

- Many have seen a considerable drop in their income caused either by someone in the household losing their job or their working hours or salaries reduced.
- While this sense of more financially constrained circumstances it is felt across the board, two groups in particular appear to be feeling the pinch.

18-30s



- This younger age cohort is seeing their employment prospects diminish significantly and many have been forced to look abroad for employment.
- While some view this chance to travel abroad as an opportunity to experience a new culture and start a career, many are despondent about having to emigrate.
- And it is notable that the parents of this generation are particularly upset that their offspring are being forced abroad given a widespread belief that Ireland's emigration problem had been solved during the boom years.

The Fallout from Recession Continues

31-40
year olds



- The generation who bought houses during the Celtic Tiger can feel trapped: they paid over the odds and are now in negative equity.
- Unable to sell, many in this cohort live in fear of losing their jobs and being unable to make mortgage repayments.

The Fallout

“People that have savings have nearly used them up in paying a mortgage.”

“Once the economy started taking off people could suddenly do things they couldn't do before like holidays and expensive cars - now people have switched back to shopping at Aldi and Lidl.”

“I think the recession is making people very creative in lots of different ways. Opening their own businesses - lots of different things.”

“I just know I'll never be able to move from this house. I'll be paying it off for the next 30 years and because I'm so far in negative equity I just won't be able to move.”

“Unless something miraculous happens to reverse it, you are preparing in your mind for the same thing every year for however long ...”

“I know a mechanic who is doing services for €500 instead of €1500, he has trade and he is out the door with work.”

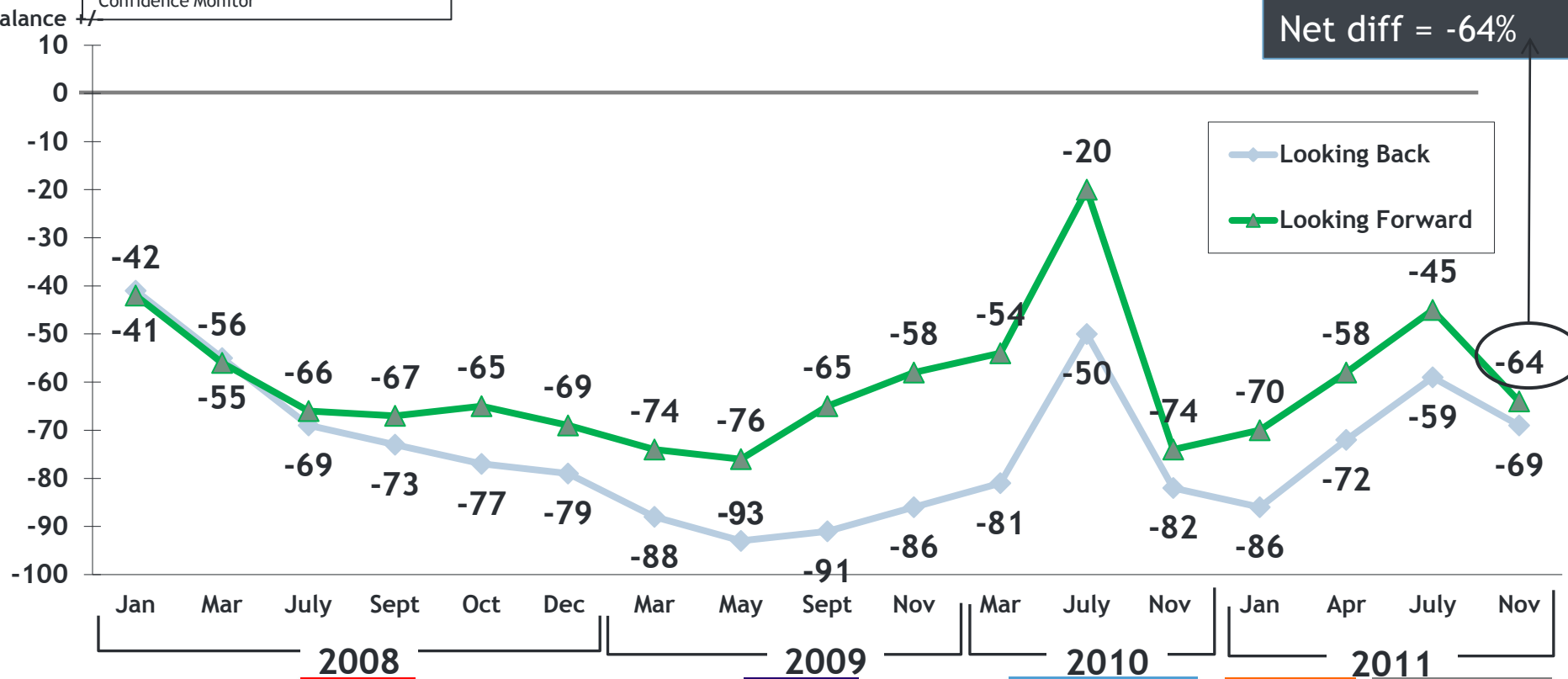
“They are a lot more price sensitive and they will actually not buy it and then go to another store if they see it cheaper.”

Irish Consumer Confidence In the Economy:

A Psychological Journey

Source: B & A Consumer Confidence Monitor

Better off 8%
Worse off 72%
Net diff = -64%



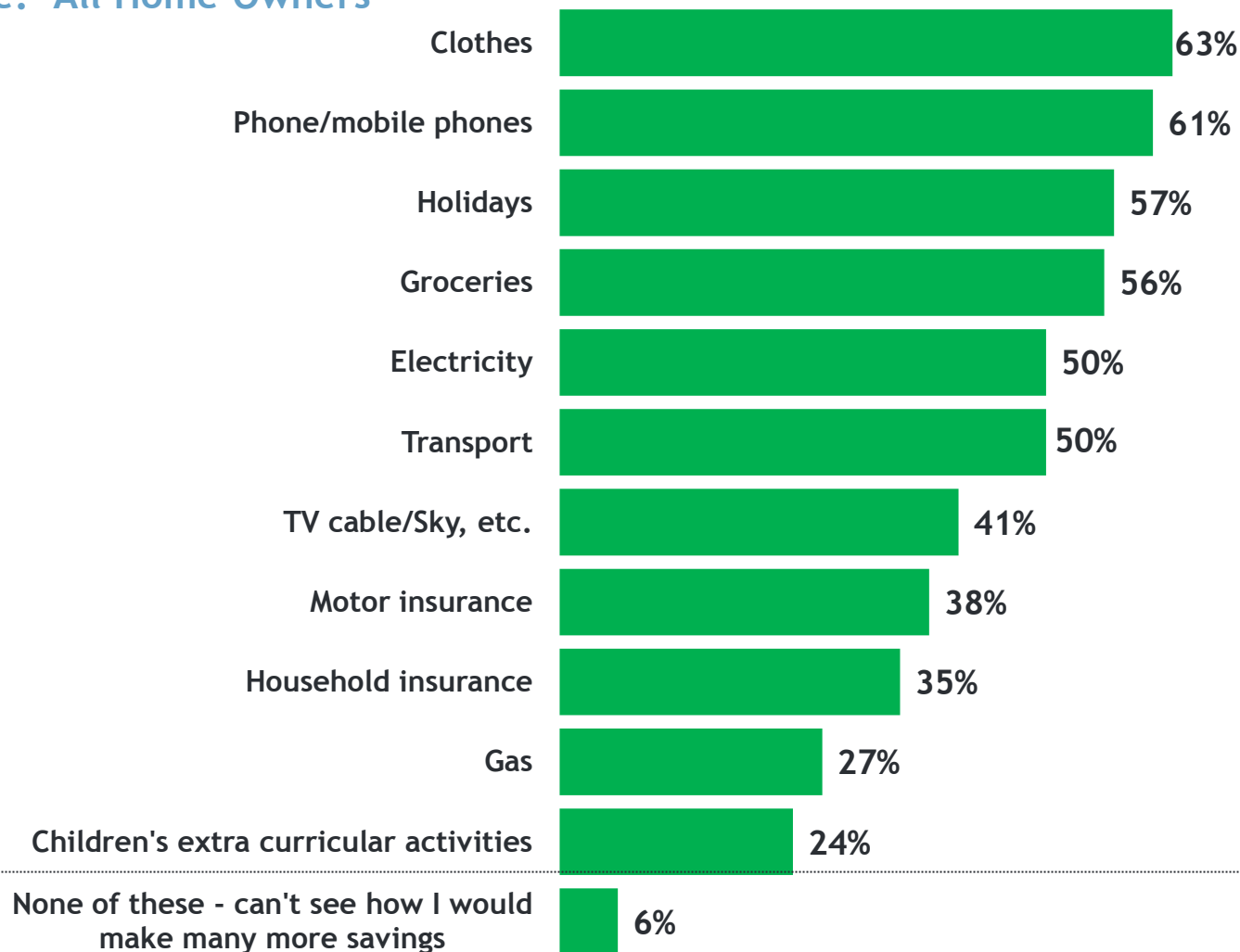
<p>Shock</p> <p>Shock as we head for recession</p>	<p>Anger</p> <p>The economy is in a worse state than we thought And it's mostly all our own fault!</p>	<p>Acceptance</p> <p>Things have been bad, but we seem to have hit the bottom</p>	<p>Despair</p> <p>IMF bailout: absolute despair</p>	<p>Despondence</p> <p>Ongoing despair - but many let's get on with it'</p>
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Generally a depressing state of affairs, with no real signs of optimism.



Where Might Householders Hope to Save Money in 2012?

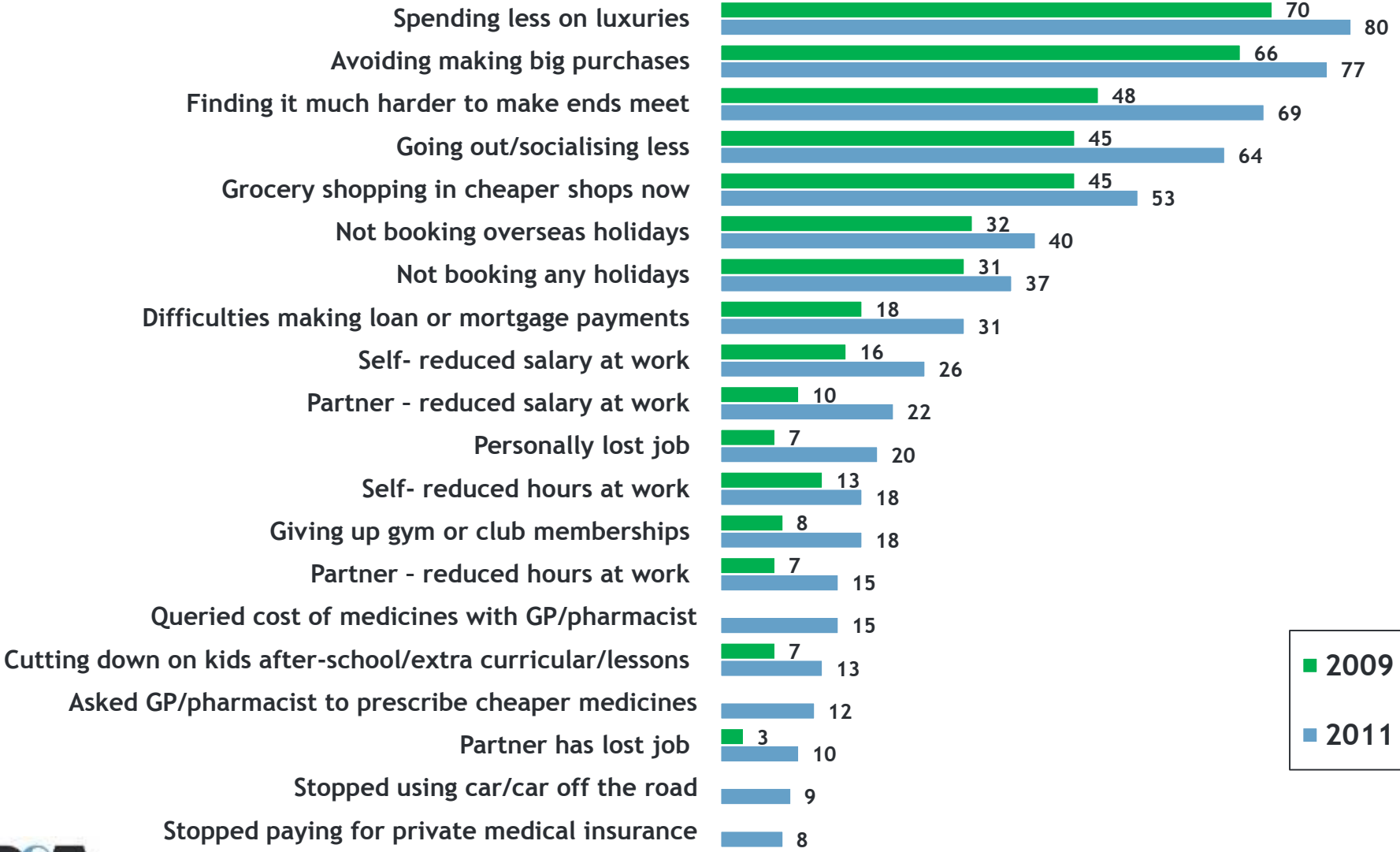
Base: All Home Owners



Personal Impact of Current Recession - 2009 & 2011

Base: 971 adults aged 16+, 3,591,000

Source: B & A Pfizer Health Index 2011



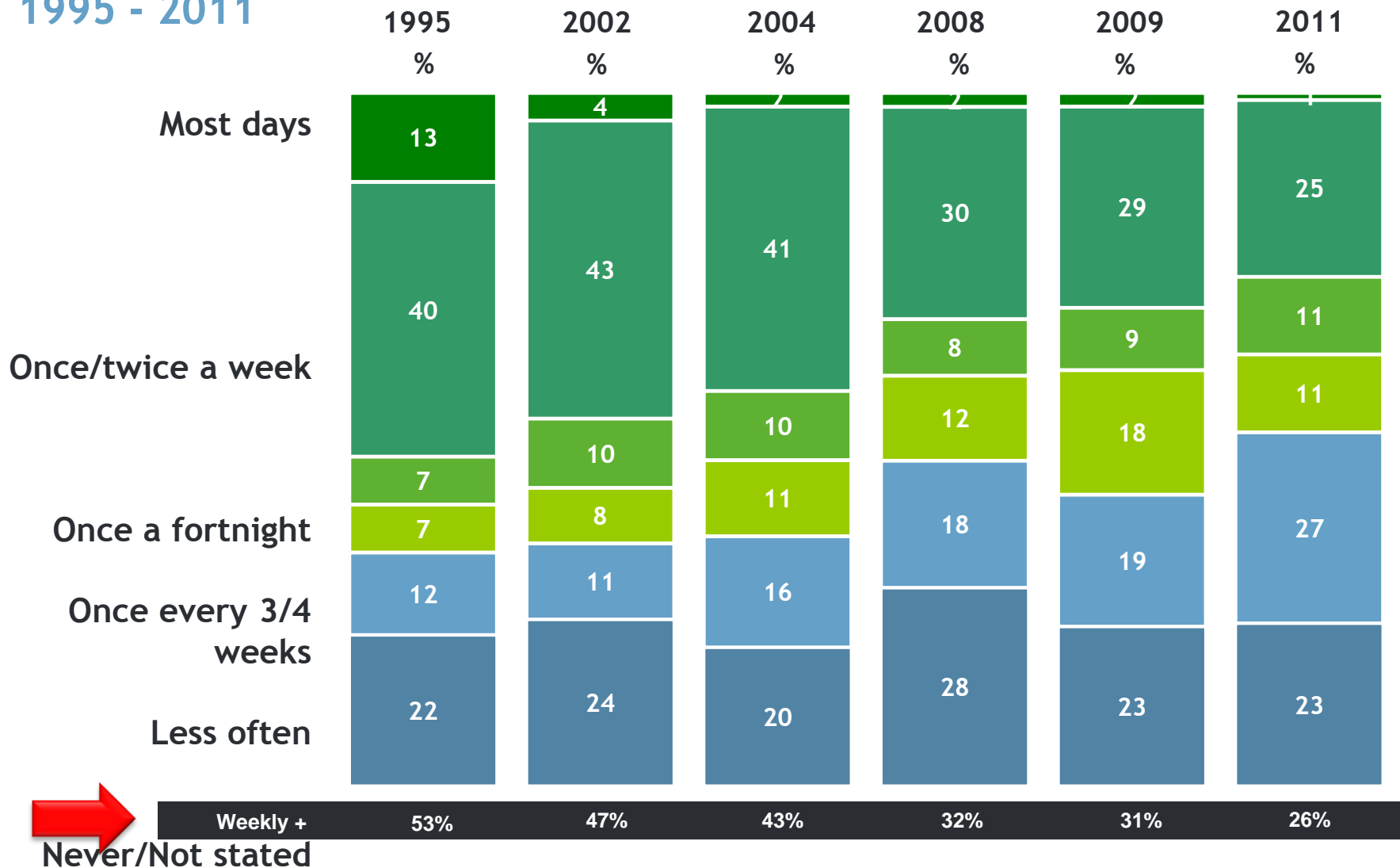
■ 2009
■ 2011



Sizeable shifts over two years relate to *making ends meet* and *socialising*. The numbers who have lost jobs has trebled and almost one in three are having problems making repayments

Drinking Out of Home - Long Term Trends

1995 - 2011



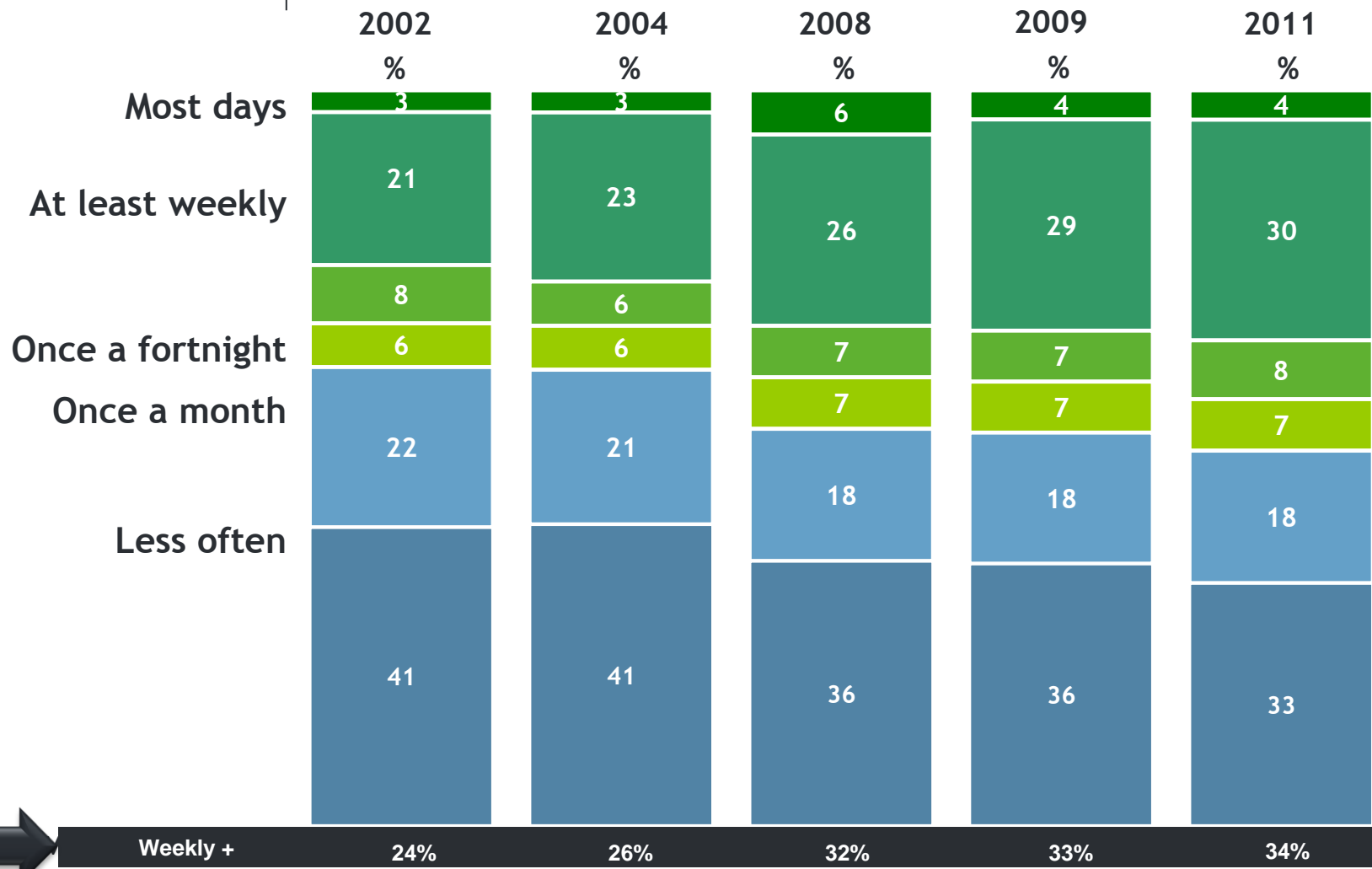
The decline in drinking out of home looked like it was going to stabilise in 2009 but it has now taken another 'dive'.



Drinking at Home - Long Term Trends

2011

ALL ADULTS



Levels of home alcohol consumption are now rising albeit very slowly. However, the growth here does not compensate for the full effect of the decline in 'out of home' consumption

Themes of 2012

Batten down the hatches

Stay local

What's in it for us?

Zoned out

Constantly connected

Getting real

Staying away

Risk aversion

Deal hunting



Batten Down the Hatches

“I can’t see us ever leaving now with the size of the mortgage, so it’s just tight: we stay in, I might go out to the local the very odd time, but I really can’t remember the last time I went into town.”



Batten down the Hatches

- There is now resignation that Ireland appears to be caught in a long term economic depression.
- This is not to say that people have lost hope entirely, but they are bracing themselves for a sustained period when money will be tight.
- As part of this there is a large cohort who have adopted a relatively pragmatic stance towards the recession having to manage their finances carefully:
 - ❖ Their financial circumstances have changed (higher taxes, salary reductions, etc.)
 - ❖ They are often hamstrung by a large mortgage (rising interest rates may add further pressure).
- People are both staying in and staying local more than used to be the case:
 - ❖ Social occasions now are likely to be much less frequent.
 - ❖ And are increasingly likely to take place in-home;
 - ❖ Pre-drinking is much more frequent among under 35s, but now many find they will not go out at all after an evening of pre-drinking.
 - The hassle and expense of going to a late bar/nightclub after a convivial evening of socialising it is simply not seen to be worth it.

Stay Local

*“It’s where your roots are,
it’s what you know, it’s your
comfort zone”.*



the atmosphere

in Dublin that day

Was one of the

Best days

In a long, long time



The pubs were

packed

And the streets
were

absolutely

amazing

With blue
and navy
everywhere



Stay Local

- People are much more focussed on what is relevant to them directly and are less interested in a more international perspective.
- There is poor recall of global events. There is a sense of detachment:

“It was a pain in the ass to be honest listening about Egypt, listening about all these places over there when everything is falling apart here.”

- There is a resurgence of support for local teams.
- Shopping is always local, but in recent times this has impacted on city centres:
 - ❖ Many gravitate to suburban shopping centres.
 - ❖ Parking and other ancillary costs often cited as barriers.
 - ❖ In Limerick for example many lament the fact that the city centre is beginning to acquire a ‘run down’ feel.

What's in it for us?

“You do appreciate the companies who give something back. Like the Ballygowan pink bottles, that was a great idea”.



What's in it for us?

- The idea of the corporate and business world having ethical or moral responsibilities also emerges as a key consumer trend that appears to be growing in importance.
- While interest in overtly 'green' or environmental concerns appear to have diminished somewhat as basic value/financial considerations take precedence:
 - ❖ There is a growing impression that businesses and brands have a responsibility beyond merely maximising profits.
 - ❖ While not using the term 'Corporate Social Responsibility' in so many words, there is an intuitive appreciation of brands who have begun to incorporate this into their marketing strategy
- Several examples are cited as examples of businesses 'putting something back':
 - ❖ GAA team sponsorship is frequently mentioned in this regard - with Skoda being the most recent high profile brand becoming involved in this area with the Tipperary team.
 - ❖ While Ballygowan's Pink bottles for Breast Cancer Awareness is also highly regarded.

Zoned Out

*“The gloom is relentless,
it’s just one thing after
another”.*



I think when
Fine Gael

Got into

power

... they got the

**Fianna Fail
handbook**



And just

Carried on

**The same
routine**



Zoned out

- Many complain they have had enough bad news.
- There can be a sense of never ending negativity in the media and many say they have simply stopped listening.
- In particular there is a lack of engagement with financial news:
 - ❖ It is too complex to understand
 - ❖ The figures are in hundreds of billions and bear no relation to the real world
 - ❖ It is numbing and ultimately boring

“It’s like water off a duck’s back, no one is shocked anymore.”

Constantly connected

“You would be talking about something in a pub and in 5 minutes you have the answers on Google. It becomes part of living basically”.



Yeah, we were the generation where we

grew up on **Star trek**

...and the

technology

...we
saw on

Star trek



We now

have that



Constantly connected

- Smart phone usage has passed a tipping point:
 - ❖ Many, particularly those under the age of 40, either have one or want one.
- This has brought changes to the way we interact with technology and each other:
 - ❖ We are rarely more than a few feet from the internet.
 - ❖ Many have shifted from texting friends to updating on Facebook
 - ❖ Any conversation can be 'augmented' with Google
- The internet is penetrating further than before from the most casual browse to the most purposeful price checking.
- Twitter on your mobile provides a supplementary news source or a stream of 'subtitles' for live TV for some.
 - ❖ Remains niche though - has yet to penetrate the mass market in the way that Facebook has.

Constantly connected

- Technology continues to shift our experience of the world, not just providing video chat with relatives overseas but almost instant access to on the street clips:
 - ❖ London riots as seen from security cameras/on camera phones
 - ❖ Tsunami footage from Smart phones.
- There continues to be a shift away from live TV, for all but sport, with more using Sky+ or other recording systems or simply downloading their favourite show.
- While those over 50 are rarely driving these changes, they are brought along with the trend. Everyone expects to have rapid access to the internet most of the time.

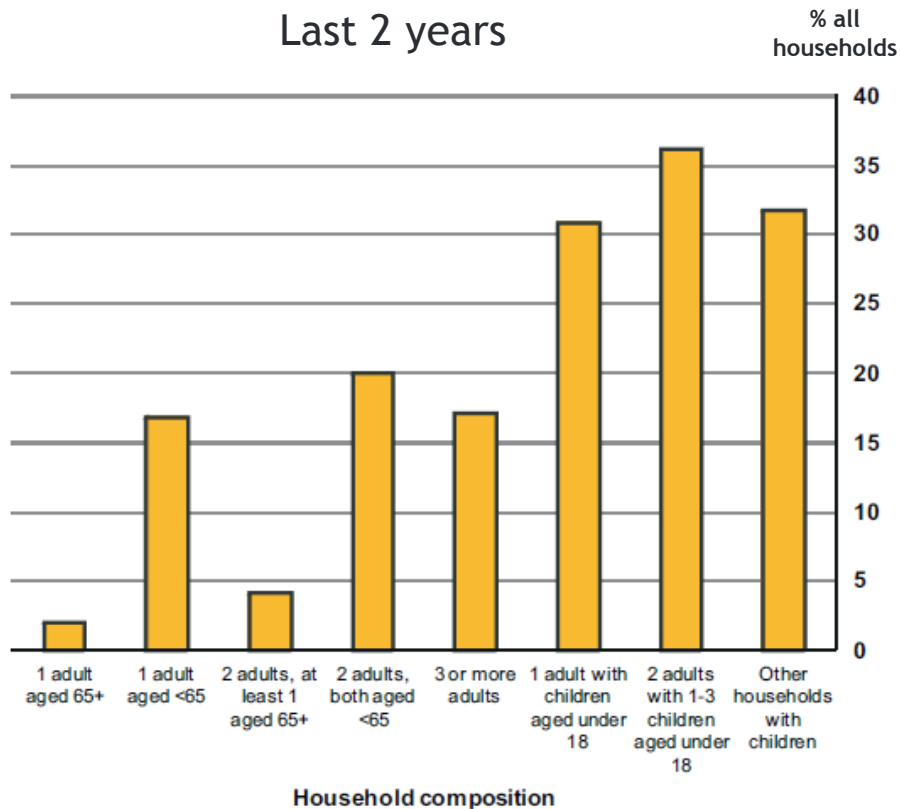
Getting Real

“This year we decided to share the cost of our bins with the neighbours.”

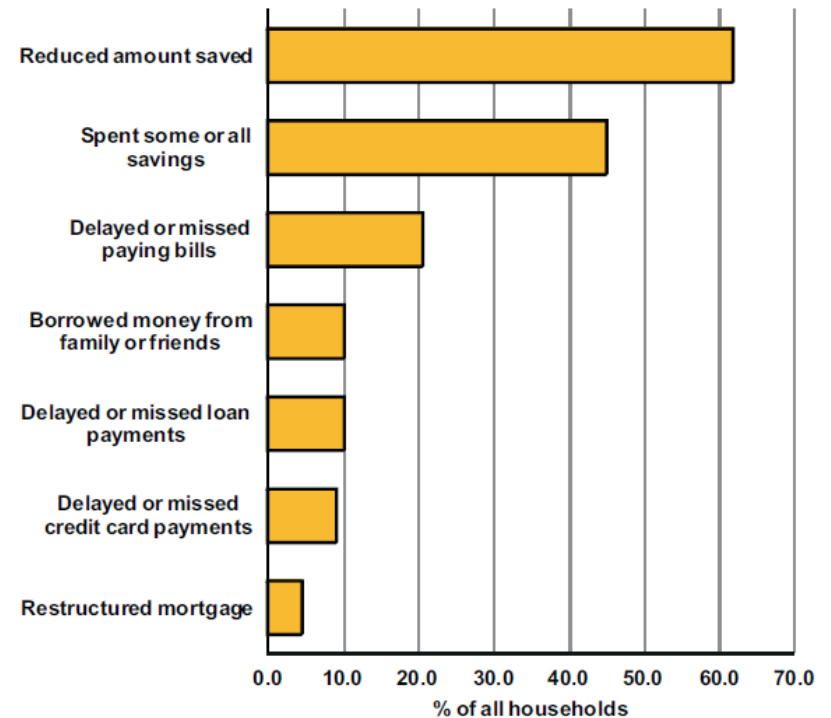


Getting Real

% households 5+ cutbacks in Last 2 years



Financial measures by household to pay for basic goods and services



SOURCE CSO
Quarterly National Household Survey
Response of Households to the Economic Downturn

In the past two years 45% spent some or all of their savings. Households with kids Under greatest pressure

Getting Real

- As finances have become more tightly constrained, many are seeking to control their lives in a more pragmatic manner:
 - ❖ Purchasing has become much more tightly managed, and more frivolous spending has been reigned in.
 - ❖ *“I’d still go out for meals, but only maybe for birthdays or things like that ... we used to go out at least once a week.”*
- Household budgets and expenditure is now planned on a much more systematic basis:
 - ❖ Many are setting out a monthly or even a weekly budget.
 - ❖ Grocery shopping lists are back in vogue.
 - ❖ And many areas of household consumption are now ‘micro-managed’.

Getting Real

- While this sense of tightly controlled finances is undoubtedly stressful, there is acknowledgement at the same time that household budgets *should* be managed:
 - ❖ And certainly that some of the spending that took place during the Celtic Tiger years was excessive and even reckless.
 - ❖ *“I had to cut up the credit card. I was just going absolutely mad on it. I got one straight after college and I just ran up a massive bill. It’s taken me three years to clear the bill and I just never want to go back to that sort of stupid spending again.”*

Staying Away

“It doesn’t matter so much when you are young but now my big brother has a kid over there. I really miss that, it’s a huge thing”.



It's just the
culture
in Ireland

Is just to **leave**
when things get



tough

Rather than

stick around, kinda

Stick through it



Staying away

- Emigration is considered a real option for those under 30. They have all thought about it, and have friends who have done it.
- There can even be a feeling that it is a waste of time to stay Ireland.
- Parents see their kids leaving the country and consider it an inevitability.
- While people in their twenties have always gone off to seek adventures, many are now planning to stay away for longer.
- They are looking for career opportunities not just a temporary job to fund their social life.
- None see any reason to come back to Ireland and encourage others to follow their example.
- This year more are really putting down roots overseas. They are settling down and starting a family.

Risk Aversion

“I know a lot of people who are signing up for another course. It’s like leave the country or stay a student”.



Risk Aversion

- The recessionary climate has created a more cautious and conservative mind-set for many. This has impacted upon spending and purchasing behaviour in a number of ways:
 - ❖ Holidays are more modest; ‘city breaks’ rather than longer trips
 - ❖ Family events are scaled down: *“Milano’s rather than a fancy place.”*
 - ❖ Spending on ‘big ticket’ items - new cars, new TVs, house renovations, etc - is carefully considered
- Given the shock caused by the financial collapse a significant degree of caution is a hallmark of attitudes and behaviour.
- In psychological terms this tends to manifest itself in people seeking the **familiar**, rather than the **adventurous**.
- At a basic level there is a tendency to save rather than to spend and there certainly has been tailoring back on ‘splashing out’ on new purchases.
- This has an important upshot for brands and for marketing generally: the likelihood is that existing products and brands will be chosen over new entrants:
 - ❖ Which does pose a significant issue for new product development.

Deal Hunting

“People are so much more price sensitive, if you don’t give them 10% off they just walk away”.



Deal Hunting

- Deal hunting has become a mainstream feature of Irish life.
 - ❖ Supermarket shelves are cluttered with discounts
 - ❖ Mobile networks vie for the best offers
 - ❖ Every coffee shop offers a loyalty card
- Irish consumers have come to **expect** they can get a discount on every purchase.
 - ❖ And they can react badly if this is not offered.
 - ❖ Retailers are expected to ‘make an effort’, to demonstrate they recognise the tough times we are all facing.
- In supermarkets, some now shop the gondola ends first - because that’s where all the deals are - and then the aisles
 - ❖ With some even feeling that if they get a good enough deal at the gondola end, they may not even bother to shop the aisle

Irish culture in 2012

“We were ruled through fear by the churches for so many years, now we are ruled through fear by politicians and bankers. The country is all fear again”



Irish culture in 2012

- All are conscious that Irish pride and confidence has been dented in recent years, both at an individual and collective level.
- The influence of the Troika over the national finances has impacted on perceptions of our place in the world and many are openly critical of this.
- In particular, there is hostility expressed toward Germany (especially) and France regarding the manner in which they are seen to be driving the European project to suit their own political and economic agendas, with scant regard for how the package of austerity measures has impacted on 'ordinary people'.
- This type of attitude reflects a certain dichotomy in how a growing number of people conceptualise Irish identity
 - ❖ At a political level, most accept that our position and standing in the world has diminished
 - ❖ Yet at a personal level, many are keen to assert the more positive values of Irish identity

Irish culture in 2012

- A number of recent events and influences have contributed to this sense of a more positive and progressive Irish identity:
 - ❖ The Queen's visit is warmly recalled and, particularly at older age levels (where memories of the Troubles are still live) is seen as emblematic of more hopeful and progressive relations between Ireland and Britain.
 - ❖ President Obama's visit, though of less historical significance, injected a more upbeat and optimistic note into the national mood.
 - ❖ Community based events and organisations - with the GAA much to the fore - contribute to a sense of a distinctive Irish culture quietly progressing.
 - ❖ Sporting achievement has also helped: the performance of and the demeanour of the Irish rugby team at the world cup and the football team's qualification for Euro 2012 are consistently mentioned.

Irish culture in 2012

- Despite these positive stories, the mood in relation to Irish sovereignty appears to be growing increasingly defensive, with a vocal cohort beginning to query whether membership of the EU is in the best interests of the nation.
- Within this, there is an emerging undercurrent of opinion, particularly expressed among working class respondents, that the expansion of the EU over the last decade has merely led to an influx of migrant workers from central Europe who, it is perceived, have ‘driven down wages’ in many sectors of the economy.

Irish culture in 2012

“Everyone seems to have accepted it because ‘of the economy’ we have to take a usage cut.”

“Walking into a shop you hardly get a smile off a person behind the counter, it’s a grunt and there you go.”

“I don’t think there’s any fight in the Irish anymore.”

“I’ve noticed a lot of Irish people have become more racist now because of all the foreigners coming in - now we did it in the States so swings and roundabouts - but the’re sending all their money home...some of them are picking up children’s allowances here when their kids don’t even live in Ireland. It’s a joke.”

The New Irish

- Most have been working in Ireland for several years and appear relatively comfortable in their working lives.
- While most initially came to Ireland as transient workers, they have now ‘settled’ in Irish life - some even having the confidence to have started their own business.
- There is general consensus that once they have kids, there is immediately a stronger bond to their adopted nation:
 - ❖ A process which is reinforced as soon as kids go to primary school; learning Irish, developing friendships with Irish kids, etc.

“He is just the same as all the other kids I suppose. He plays Gaelic football, he even sounds like a little Sligo boy.”

- Many harbour a nostalgic desire to return to their homeland but in reality feel that, despite the recessionary climate in Ireland, their standard of living is still considerably higher here than it is in central and eastern Europe.

The New Irish

- The extent to which the new communities have integrated into Irish life is perhaps limited:
 - ❖ Many still shop in Polish or central European stores
 - ❖ Socialisation, broadly speaking, still seems to focus around their own communities and Irish socialisation such as pub culture seemed not to have been fully embraced.
- Nonetheless, many feel they do socialise frequently in work context and most would feel that they have Irish friends
- One of the aspects of Irish culture that consistently seen as a positive is the degree of friendliness and informality:
 - ❖ Most are taken aback initially at the casual pleasantries ('how are you doing?', 'wet day out there', etc.)
 - ❖ And feel it is an engaging aspect of the Irish character

The New Irish

- Despite the broadly positive experience of Ireland there are negative aspects to their experience, of which two are highlighted
 1. The food: Irish food is widely felt to be bland and it is consistently mentioned that the quality and variety of Irish cooked meats is limited, and most still source their salamis, sausages, cured meats in Polish or East European shops.

The lack of fresh baked morning bread is another area where Irish food culture is felt to be sorely lacking.
 2. Rising anti-immigrant sentiment: Incidences of racist or anti-immigrant comments are felt to have become more prominent since the recession. This particularly angers those in the hospitality industry, who feel that they were employed in jobs that *“Irish people didn’t want”* during the Celtic Tiger years.

The New Irish

“We went home last summer, me and my son, as we were talking about it, my son said ‘Why do you keep calling it home, this is our home’ and of course he’s right, he’s grown up in Sligo all his life. But it made me kind of sad”

“I work at a deli and all Irish men ever order is ham and cheese, ham and cheese, ham and cheese ... and there’s only two types; ham or crumbed ham. Two types of ham!”

“Irish people are so friendly, they really are. If you go into a deli counter in Ireland, they will say ‘hi, how are you doing?’, ‘how are you, are you okay?’ At first I thought it was really odd, but actually I think it’s really nice.”

“A guy came up to me in the coffee shop where I worked and started saying stuff like, ‘You shouldn’t be here, you’re taking our jobs’ and I said, ‘I’ve been working in this coffee shop for 5 years while you were doing nothing, so don’t tell me I don’t deserve it. I have no time for that.”

“The rain gets you down alright, I came here in a November, and it was a bit depressing, but I thought at least it would get better by the summer. It didn’t.”

Emigration

- Everyone seems to have been touched by the Irish exodus
 - ❖ Young people have many friends overseas and are looking at their own exit strategy
 - ❖ Settled consumers admire the bravery of those that sell up and leave
 - ❖ ...or watch as their children pack their bags...
- It has become an accepted fact of life and has brought us back to a general sense things are 'better elsewhere'.

Emigration

“One went a couple of weeks ago to Australia the other lad is going next week to New Zealand. Its heartbreaking for the families.”

“They get a fantastic education and they are not going on the dole with a Bachelor’s degree or whatever, they’re going to get a job somewhere else.”

“When we emigrated we came back because we love the place. I don’t know whether the kids today love the place.”

“I admire guys that go, that shows the fighting spirit, rather than sit here and have their houses repossessed - they’re willing to give up everything they have and move.”

“I don’t know what I will be doing - but I won’t be staying in Ireland anyway.”

Emigrants

- This year for the first time we have included Irish emigrants living in Australia in our round up of the consumer zeitgeist.
- Using our own online discussion platform we gathered input which gives us a unique perspective on an increasingly important cohort of expats.
- Most left Ireland with a fairly short term plan to find fun and adventure but increasingly their perspective is longer term:
 - ❖ *“I have gone from a one year holiday visa to being sponsored. I now have permanent residency which allows me to stay in Australia forever.”*
- While the cost of living is high many feel the lifestyle and standard of living are much better than in Ireland.

Emigrants

- They claim that the global financial crisis has not affected the Australian economy and career progression in Australia is a reasonable aspiration.
- Small firms over there may balk at the \$4000 required for sponsorship but many find other options allowing them to stay longer including jobs in remote territories.
- The appeal of a new country and a new start is undoubtedly critical:
 - ❖ *“You can challenge yourself - take a chance and succeed in a vibrant country while meeting new people along the way!”*
- Not least as an assertive, positive response to an otherwise **depressed** European outlook
 - ❖ *“It still seems like they are still going on about the recession in the media - and people in Ireland are on about it all the time.”*
- Mainstream media in Australia hardly registers anything to do with Ireland. It is only through visiting Irish news websites and keeping in touch with friends and family that emigrants form this opinion about a continuing ‘gloom’ in Ireland.

Emigrants

- There is a sense from these emigrants that the depressed outlook has contributed to the exodus:
 - ❖ *“Ireland is a place down in the dumps, lacking any real good news to liven up the spirit of the people, and as a knock-on effect causing young and old to look to new horizons.”*

Emigrants

“I spent my first Christmas on the beach this year, which is an Aussie tradition I’m led to believe.”

“South East Asia is easily accessible from Australia, as is New Zealand and both are on my to do list.”

“I heard before leaving home that Australia is crying out for engineers, but I wasn’t so positive after 7 weeks of job hunting.”

“I read the Irish Times and Independent on line and wonder how all these crooked builders have avoided jail.”

“The distance from home can be unnerving at times, its gonna take 28 hours and lots of flights - but you’ve always got Skype.”

“My perspective leaving Ireland was that people would be moaning about the recession all the time - and that hasn’t changed.”

Media

- There can be a sense of relentlessness about the stream of bad news in Ireland and Europe.
- Some have begun to switch off mainstream news partly in response to this content and partly as other sources rise in importance:
 - ❖ YouTube, Facebook and for some Twitter, supplement traditional news sources providing a greater sense of ‘unfiltered news’.
 - ❖ There may be a lack of **reliable** commentary, but there is a visceral quality to the views of ‘real people’ which is increasingly sought out as a touchstone.



Media

“We are overloaded with all this information about wars and everything that is happening in the rest of the world, the doom and gloom and the bankruptcy and how much the country owes and all the rest of it.”

“The gloom is a little relentless. Its just one thing after another.”

“If you look at the papers, every single day there is something to do with Ireland’s debt, this debt or that, how can they make such a show of the fact they missed 3 billion.”

“It leaves a lot of people very uncertain as to where it leaves them and how they are going to deal with it. I suppose it results in a lot wanting to run and leave.”

Looking forward

- Expectations for the year ahead can be fairly bleak when framed by ongoing concerns about the economy and job security. However significant events this year do stimulate positive interest and debate:
- In particular the London Olympics draw positive talk with the sense that there will be a shared sense of enthusiasm about such a big event close to home.
 - ❖ There is also some feeling that we will benefit from the ‘spin off’ of international visitors who include Ireland in their itinerary when here for the Olympics.
- However, probably the most significant event anticipated this year is again a sporting special with Ireland in Euro 2012
 - ❖ Many expect this to lift the country and bring a much needed boost to national pride.

Looking forward

“We have the European Championships next year - that’s going to be massive.”

“It will be good watching everyone who is best in their field.”

“There should be a kick-back from the Olympics people from all over the world will arrive in London and they’ll say lets pop over to Ireland for a day or two.”

Summary

- There is no doubt that most people are bracing themselves for another tough year ahead.
- There is growing acceptance that there is little sign of economic recovery in the immediate future and that ‘austerity’ is here for the ‘long haul’.
- Many focus on the need to manage their way through the tough times
 - ❖ And plan their finances in a more cautious manner.
- This note of caution is likely to be the hallmark of the year ahead as people ‘batten down the hatches’
 - ❖ The trend towards socialising in home is likely to continue
 - ❖ Value offers and deals will continue to be sought after
 - ❖ Purchasing of ‘Big Ticket’ items is likely to remain at a relatively low level

Summary

- For those in their 20s the employment situation looks bleak, and emigration is likely to continue apace.
 - ❖ Reports back from those who have already emigrated to Australia suggest are some long term employment prospects and a generally more positive economic atmosphere
 - ❖ And it is notable that many who had envisaged that their emigration would be only a temporary sojourn are now accommodating themselves to the idea that their stay may be longer term
 - ❖ With evidence that some are starting to settle down in their new country.
- This ‘settling down’ process has also occurred among many of those who have arrived into Ireland from central and eastern Europe over the last decade
 - ❖ And indeed sentiment among this audience often displays a positive, ‘can do’ attitude that is more optimistic in tone than their native Irish counterparts.

Conclusions

- Those in the 30-50 year old age cohort may have better employment prospects than their younger counterparts but many are saddled with significant levels of mortgage debt and they can often adopt a somewhat bleak outlook.
- This has implications for marketing communications, in that it will be important for brands to display an understanding of the straitened circumstances that people find themselves in.
 - ❖ Value deals and special offers are an obvious means of doing this, though we suspect that many brands have been pushed so far in this direction that there may not be much more for them to give
 - ❖ Potentially a more interesting route - championed by David Jones in Who Cares Wins, among others- might be to develop brand communications that reflects an appreciation by business of the world around them.



Conclusions

- There is a sense that many under 30s have lost confidence in Ireland: their job prospects at home are often limited and there is growing appreciation that life in places such as Australia offer not just better employment prospects but an escape from the incessant ‘doom and gloom’.
- In marketing terms there is a real challenge to overcome this despondency, but there are clearly gains to be made by brands who inject sufficient excitement and enthusiasm into their brand communications.
- Engagement with local advertising campaigns this year demonstrates that we still respond to positive expressions of a distinctly Irish style of humour.



Conclusions

- There is a sense of energy and dynamism amongst a significant cohort of the ‘new Irish’ that in some respects may act as an antidote to the mood of caution and despondency displayed by the country as a whole.
- It may well be that it is the ‘New Irish’ that will provide an injection of energy and confidence into the economy, in much the same way that Irish and Italian communities have done in America in earlier times.



Sign of the times 2012

