



# SIGN OF THE TIMES 2017

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Behaviour & Attitudes  
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[www.banda.ie](http://www.banda.ie)

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# Sign of the Times 2017

- This is the 8th Annual review of trends in Ireland from B&A.
- It brings together the results from in-house projects combining specially commissioned groups, and survey data.
- We look at 'Irishness' in 2017, how the world views us and the impact of shifts in technology, shopping and international politics.

# International news



# Irish news



# Irish Republic





# Headlines

**Where's my share?**

**Love my discounter**

**Reasserting real**

**How far we have come!**

**Unsettled future**

# Taking the temperature

**Booming cities**

**Anti-establishment**

**Rising entitlement**

**Depressed regional towns**

**Austerity rebound!**

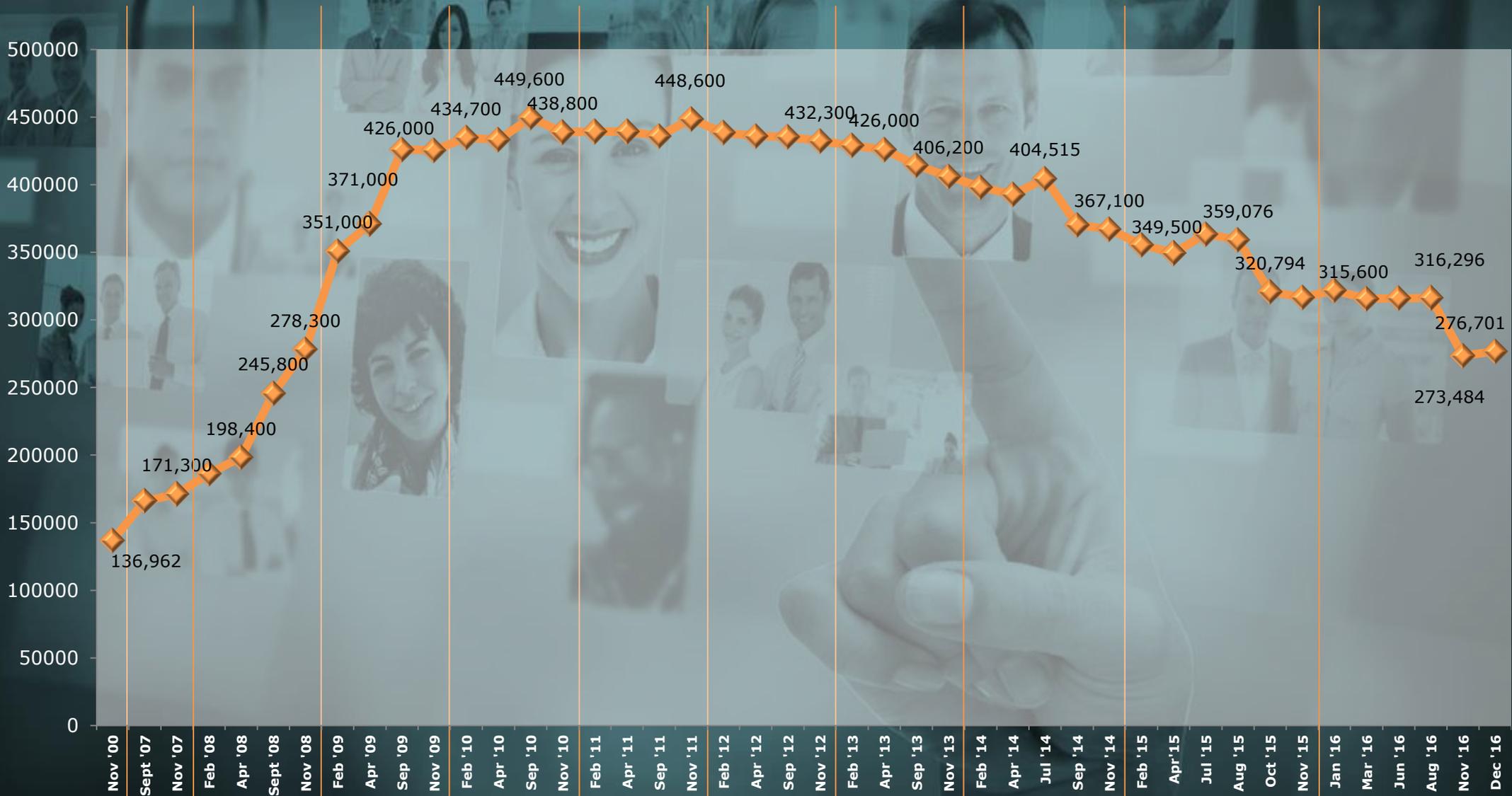
**Squeezed middle!**

**Tiger phantom persists**

**Cautiousness**

**Where's my share?**

# Live Register numbers have fallen sharply



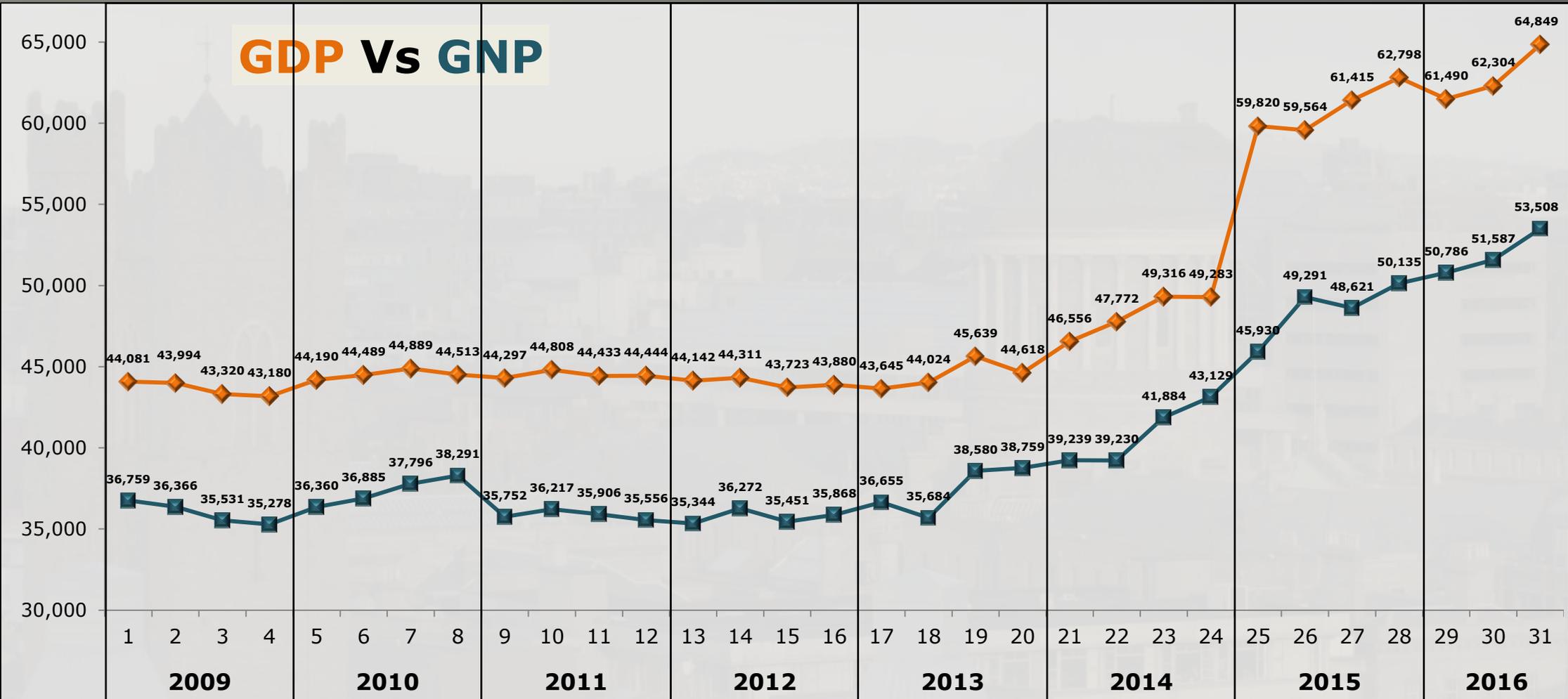
\* The Live Register is not designed to measure unemployment. It includes part-time work e.g. seasonal & casual workers who work up to 3 days per week

Source: [www.CSO.ie/Persons on live register](http://www.CSO.ie/Persons%20on%20live%20register)



# GDP and GNP continue to rise

## GDP Vs GNP



\*GDP and GNP data correct as of Dec 2016

Source: [www.CSO.ie](http://www.CSO.ie)  
 Quarterly National Accounts  
 \* Q3 2016 results not yet available



*“People are more safe in their job at the moment, they feel like they can spend a small bit.”*



**The economy might  
be improving but it's  
not balancing...**

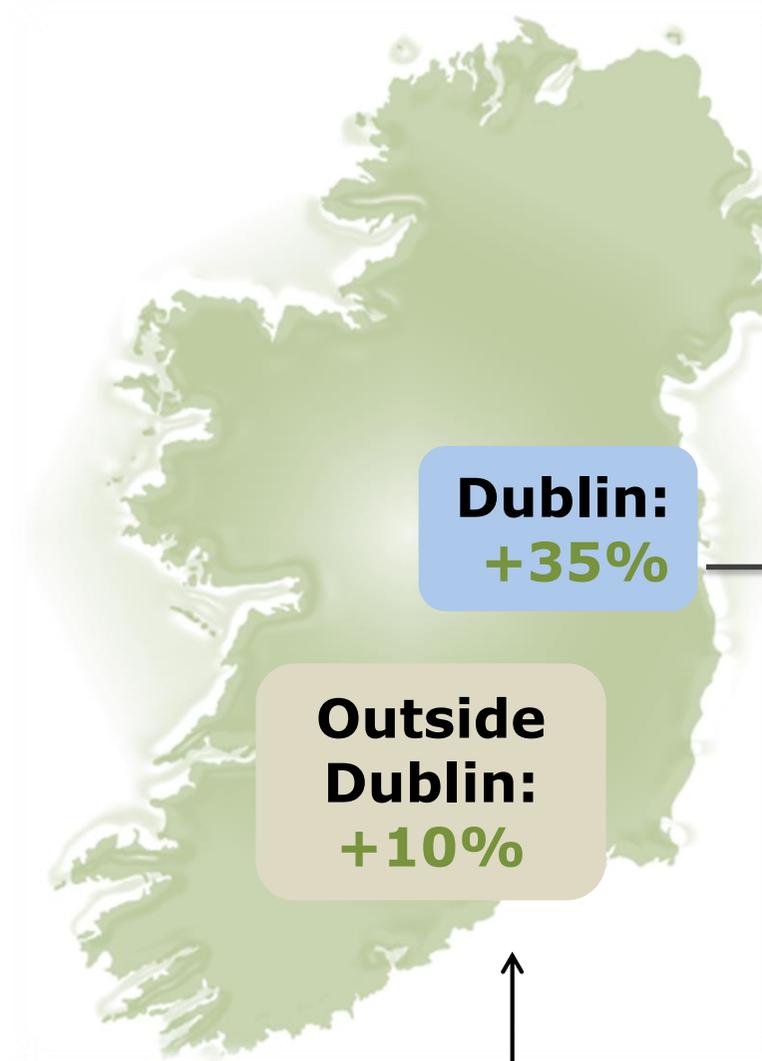
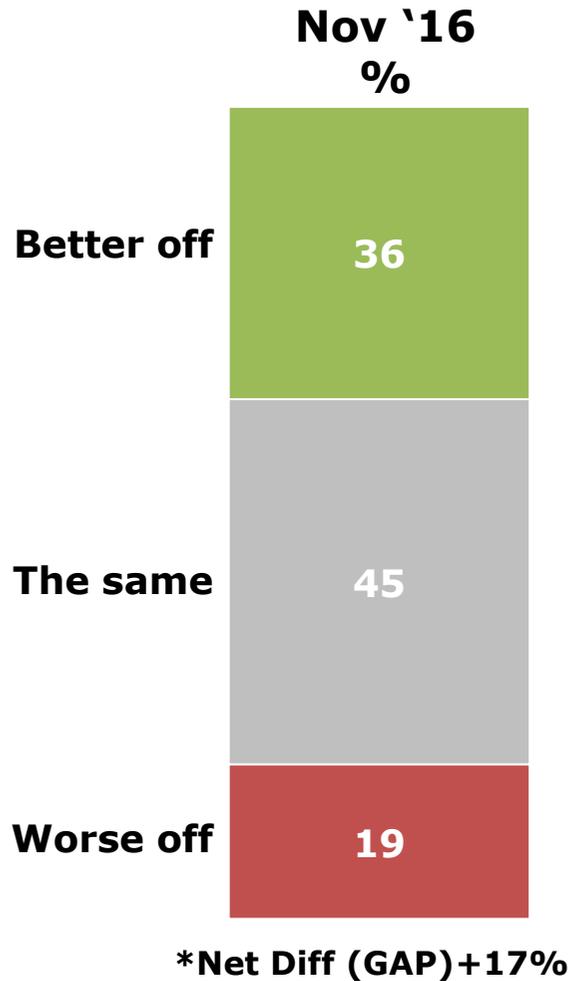
**Improving  
economy**

**Irish  
people  
still  
struggling**



# 1 in 3 think we will be better off in the coming year – particularly Dubliners

Base: All Adults 16+



A widening in consumer confidence apparent between Dubliners and those outside Dublin

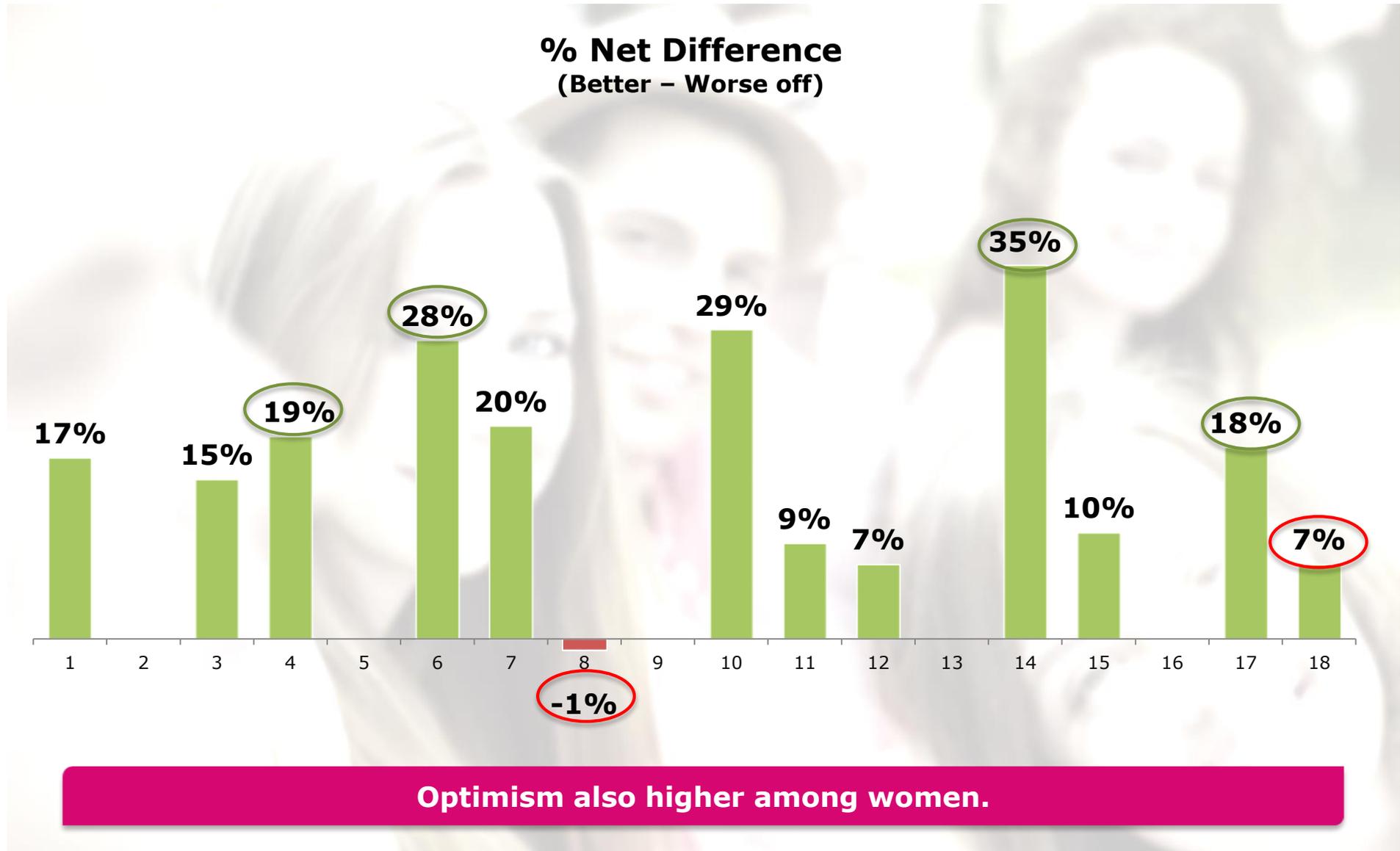


*“The vans all pull out of town and head for Dublin at 5am, that’s where all the work is. There’s a bit starting to happen around Galway, but nothing much here.”*



# Consumer Confidence is highest among Dubliners, ABC1s and the under 35s

Base: All Adults 16+



# Middle income earners are being squeezed





*“My wife  
finished work  
because we were  
spending €2,000  
a month on  
child care.”*





**Free childcare**

**Save for deposit**

**Grand  
parents  
helping to  
make ends  
meet**

**Adults kids moving  
home**

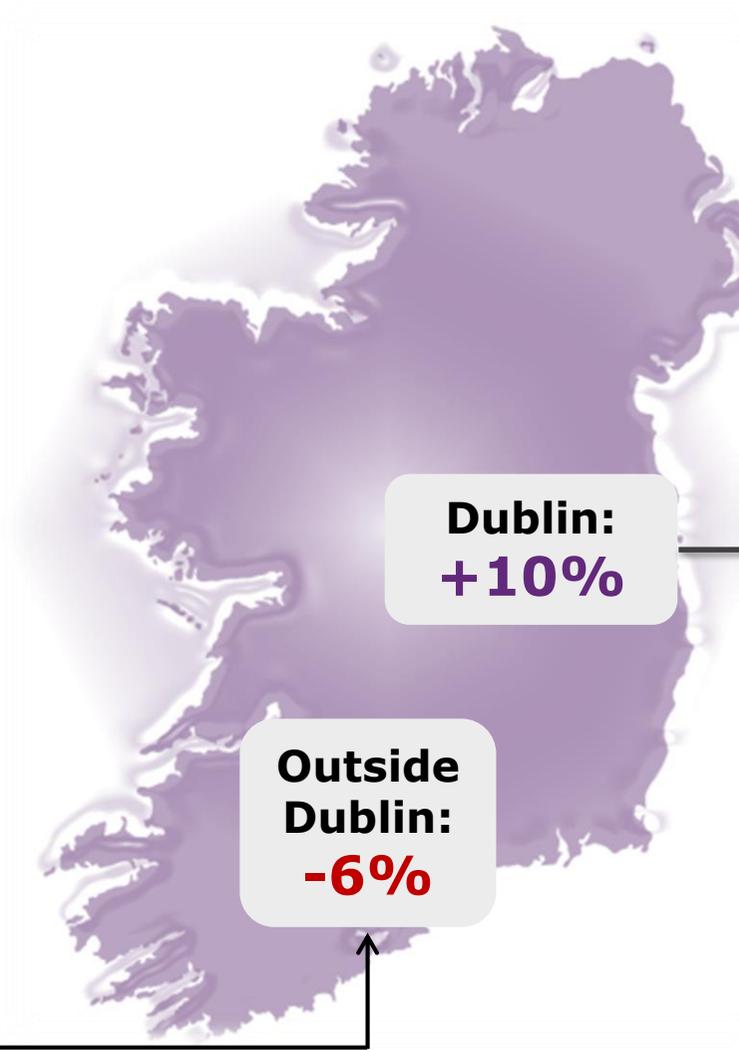
**Dig out on bills**

*“Rent in Dublin is through the roof. I’ll never be able to save enough for a deposit. I’ve given up hope of ever being able to buy a house.”*



# Caution persists, especially outside Dublin

Base: All Adults 16+



Dubliners showing more optimism towards future spending.

\*Net Diff (GAP) -1%

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Feb '16	Apr '16	July '16	Sept '16	Nov '16
Gap	+7%	+5%	-29%	-63%	-47%	-52%	-45%	-37%	-19%	-13%	-3%	-7%	-3%	-5%	-1%



# Unrest evident

Sources:  
[IrishTimes.ie](http://IrishTimes.ie)  
[Independent.ie](http://Independent.ie)

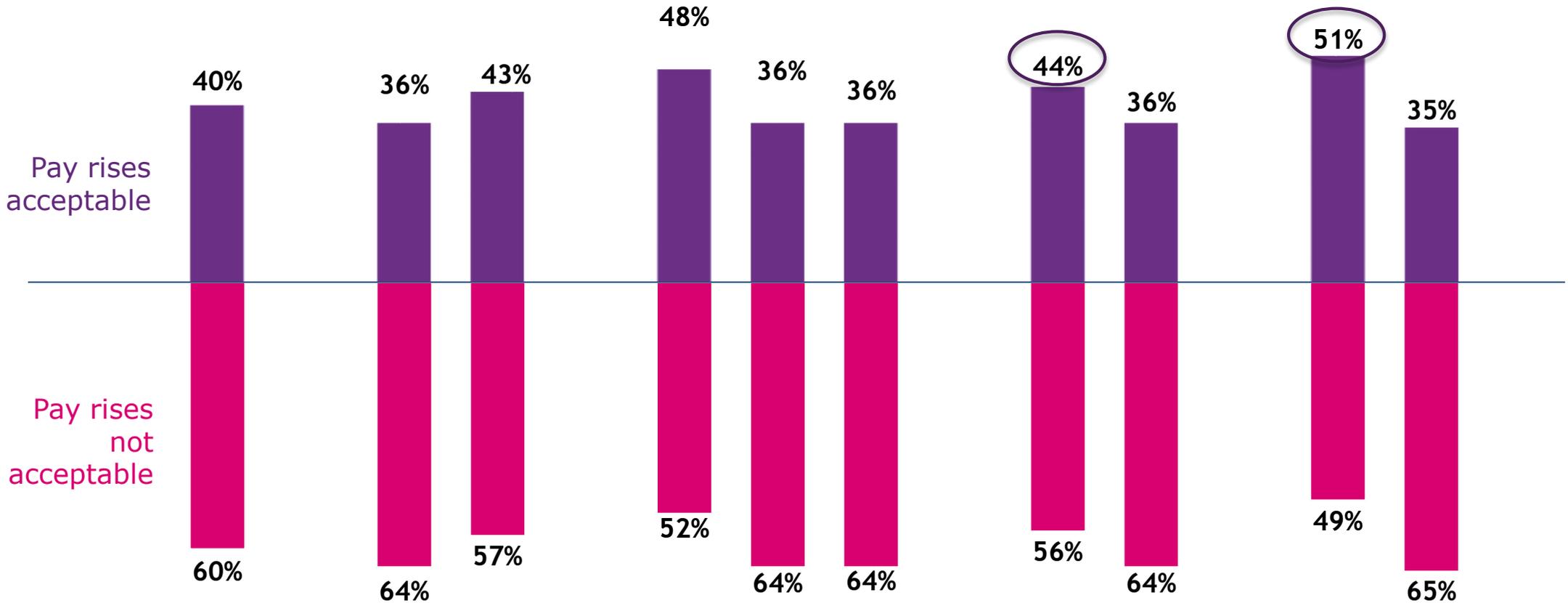
Source:  
[IrishTimes.ie](http://IrishTimes.ie)  
[Herald.ie](http://Herald.ie)



# Support for Public sector workers is divided

Base: All Adults 16+ ~ online 509

Total	Gender		Age			Social class		Region	
	Male	Female	16-34	35-54	55+	ABC1F+	C2DEF-	Dublin	Outside Dublin

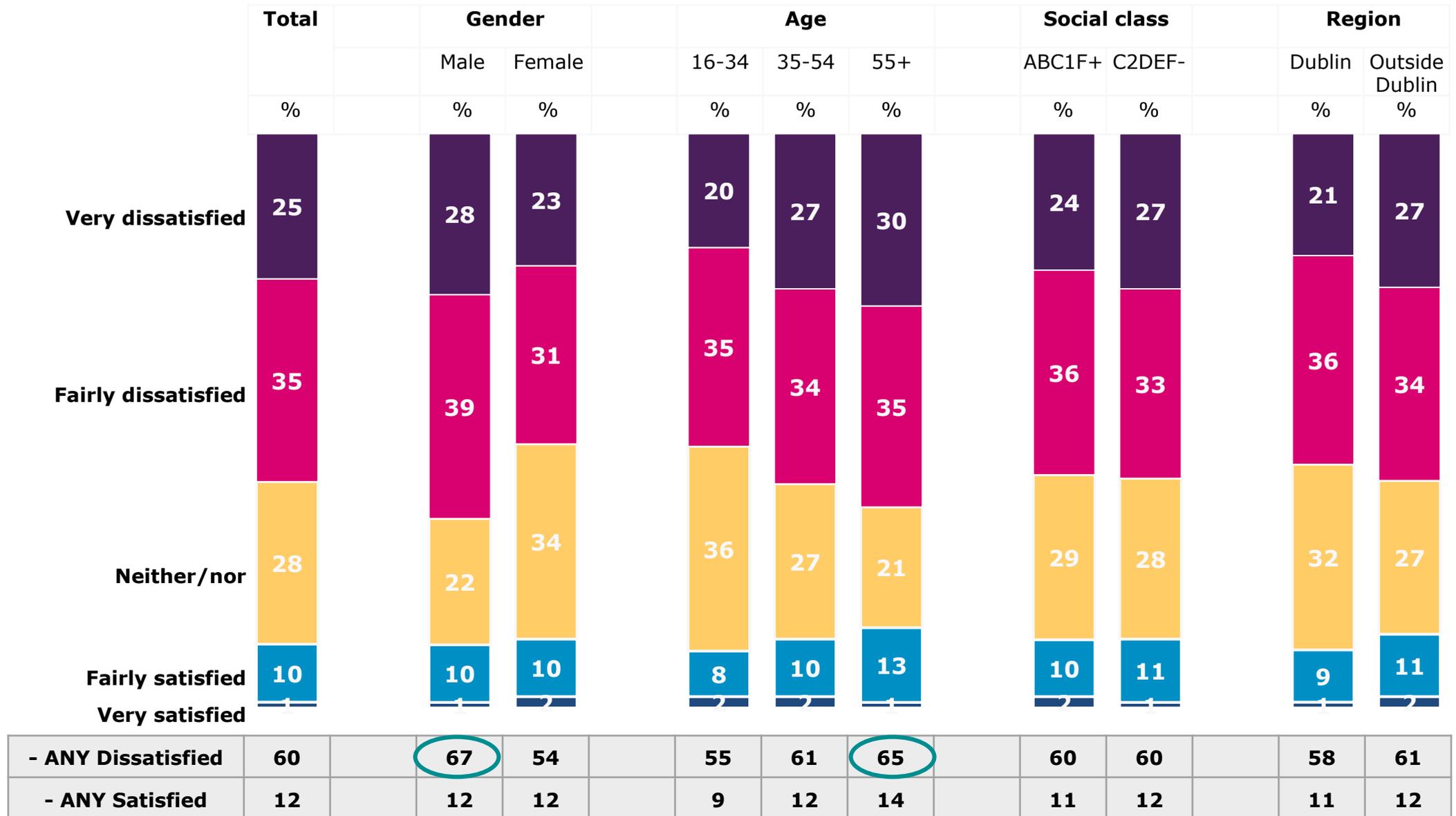


Q.3

Which of the following most accurately reflects how you feel about public sector workers receiving pay rises above and beyond those allowed for in the Lansdowne Road agreement?

# Dissatisfaction with Government handling of the public sector pay disputes

Base: All Adults 16+ ~ online 509



Q.2

Overall, how satisfied are you with the Government's handling of the recent public sector pay demands?

A man in a white shirt and dark tie is shown from the chest up, shouting with his mouth wide open. In the foreground, a hand holds a stack of Euro banknotes, including a 100 Euro note. The background is a solid blue color with a faint, large watermark of the word 'EURO' and a hand holding money.

*“Everybody just says give me what I lost instead of let’s go in baby steps. It’s the exact same thing we did 15 years ago when everything went absolutely nuts in terms of wages and house prices.”*



**Some issues are prevalent across the country...**

**Challenging mortgage rules**

**Ghost estates**

**Homelessness**

**Rising rents**

**Housing shortage**

**FOR SALE SHORTAGE**

# Homelessness is a major concern



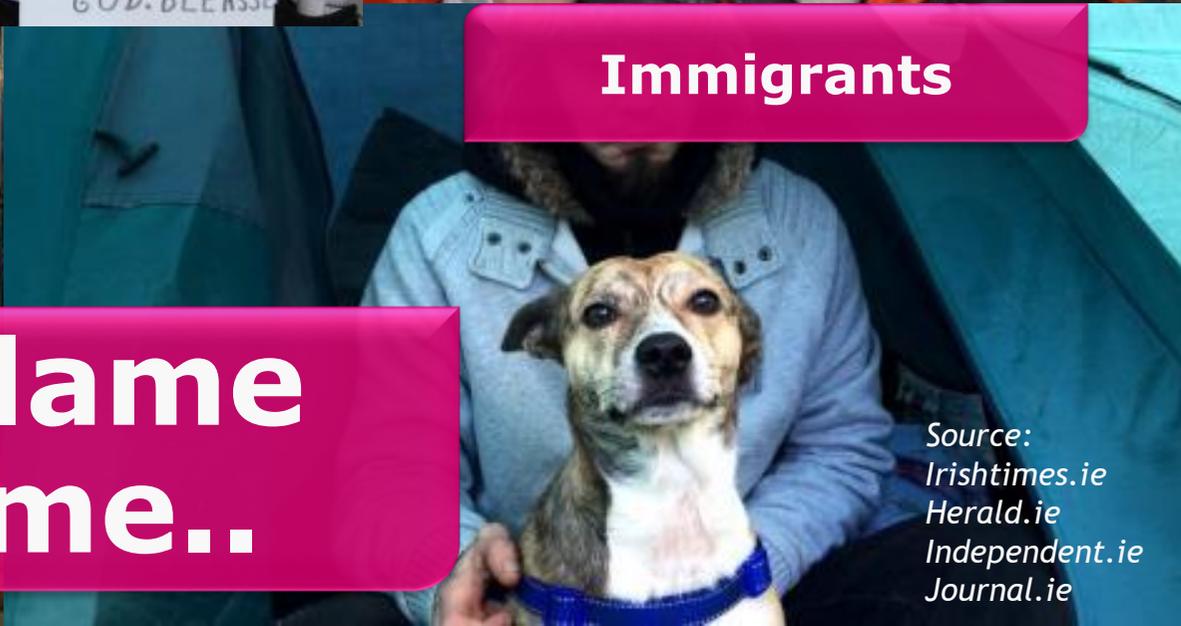
Vulture funds



Government



Self inflicted



Immigrants



A blame game..

Source:  
[IrishTimes.ie](http://IrishTimes.ie)  
[Herald.ie](http://Herald.ie)  
[Independent.ie](http://Independent.ie)  
[Journal.ie](http://Journal.ie)



**What would  
you do?**



*“Would you take  
a tenant who is a  
potential rent  
allowance type or  
someone who is a  
professional  
worker?”*



# Post austerity entitlement?

Who deserves the benefits from the improving economy?

There is a lot of debate and little agreement...

Public sector?

Immigrants?

Homeless?

Most expectations are set with reference to recent history

**We resent  
entitlement..**

*“I see them all the time. They’re getting put up in a hotel because they claim to be homeless, but they don’t even stay there all the time. And then the kids are there playing with their Play Stations. I can’t afford things like that for my kids. I’m not saying they’re all like that, but a lot of them are.”*

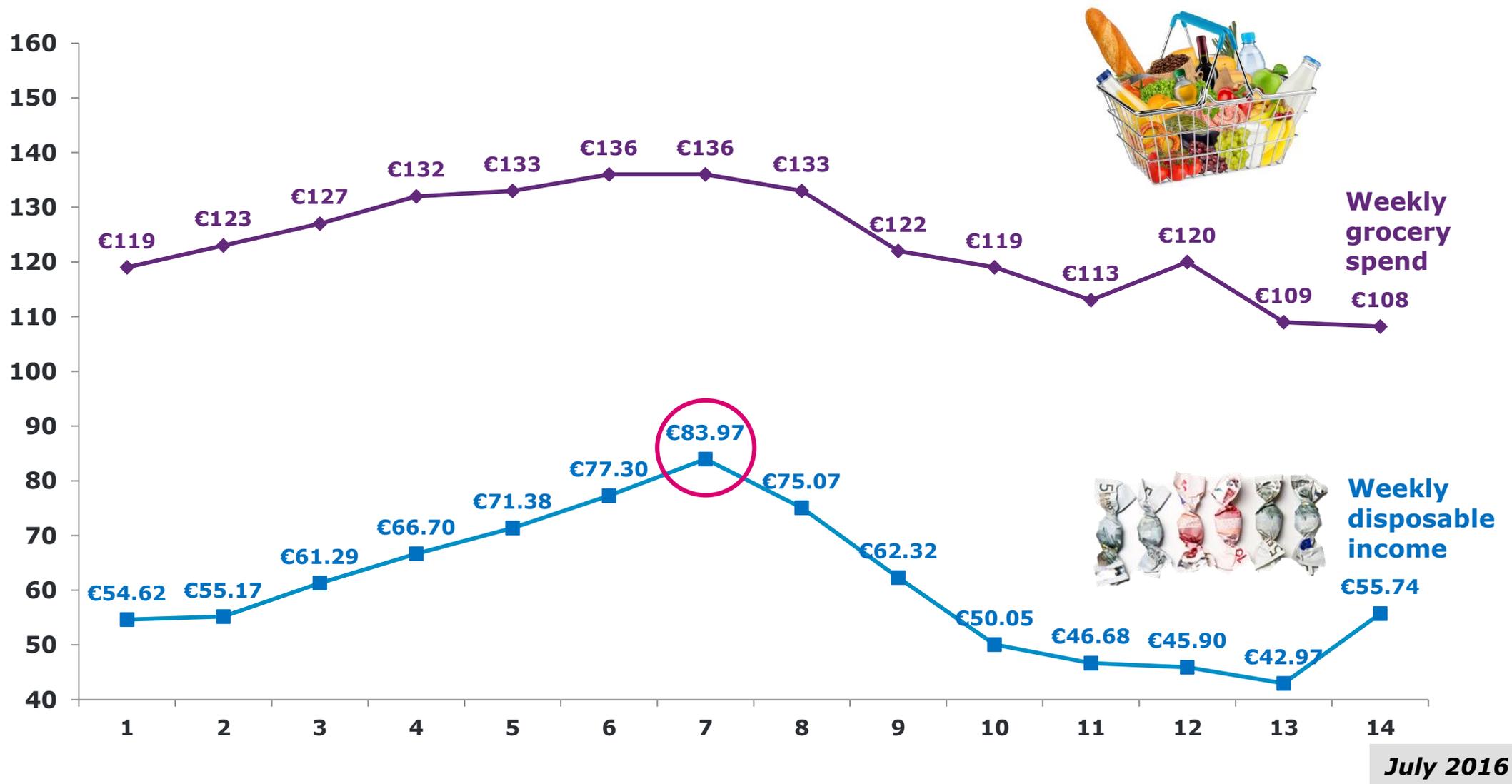




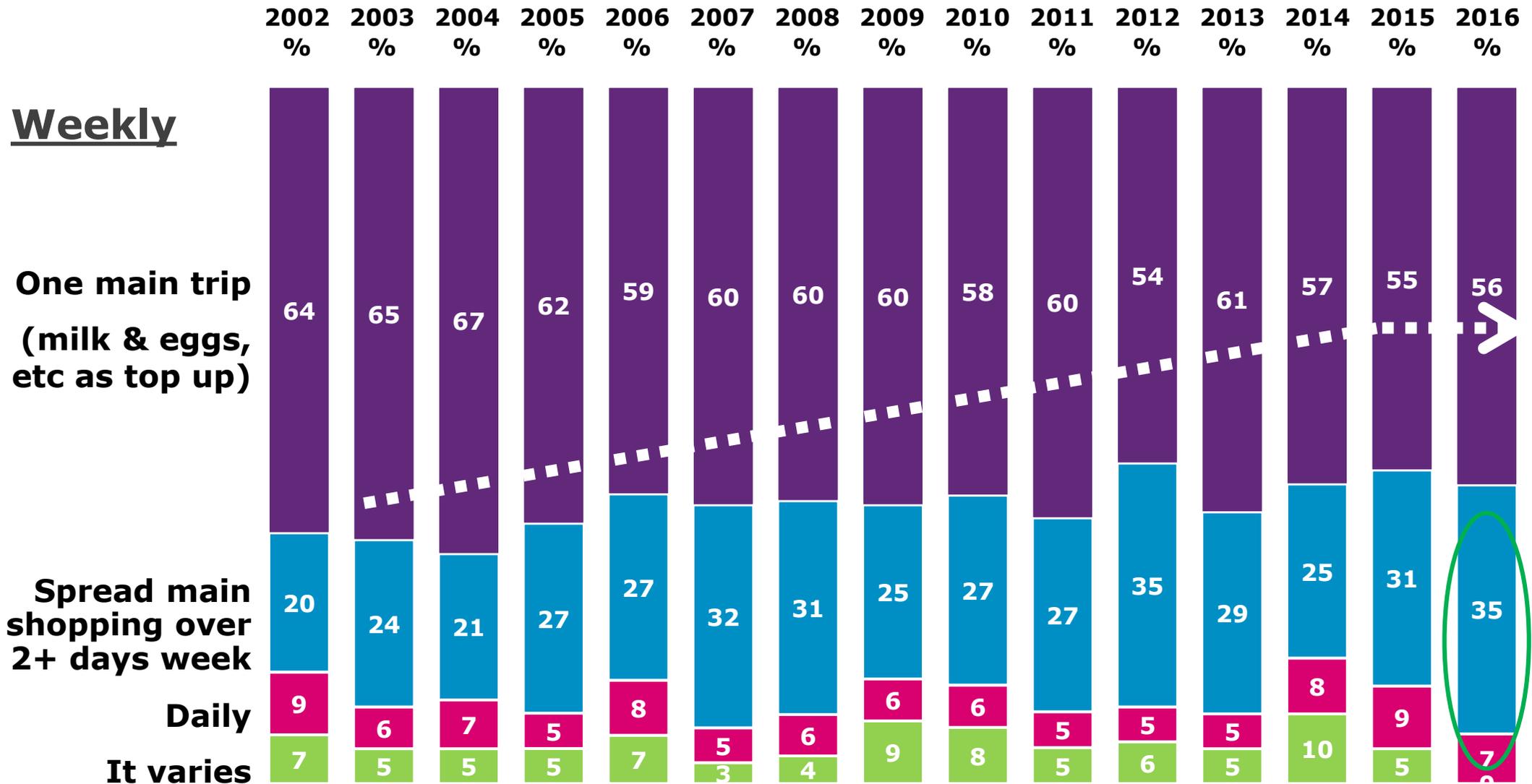
*“They have gone through the hard times with pay cuts and pay freezes and all that and now people just want a little back.”*



# Lowest grocery spend and rising disposable income ...yet we remember the peak...



# Highest ever proportion shopping twice a week+



All grocery shoppers: 687

Q.6

Which statement best describes your normal approach to grocery shopping nowadays?



# Over half of all grocery shoppers visit more than **one** grocery store on the same day!

One store only



46%

Two



37%

Three



10%

It varies/Four+



7%

**Average = 1.69**

All grocery shoppers: 687

Q.10

When you are doing your typical main grocery shopping trip, how many grocery stores do you visit on that same day?

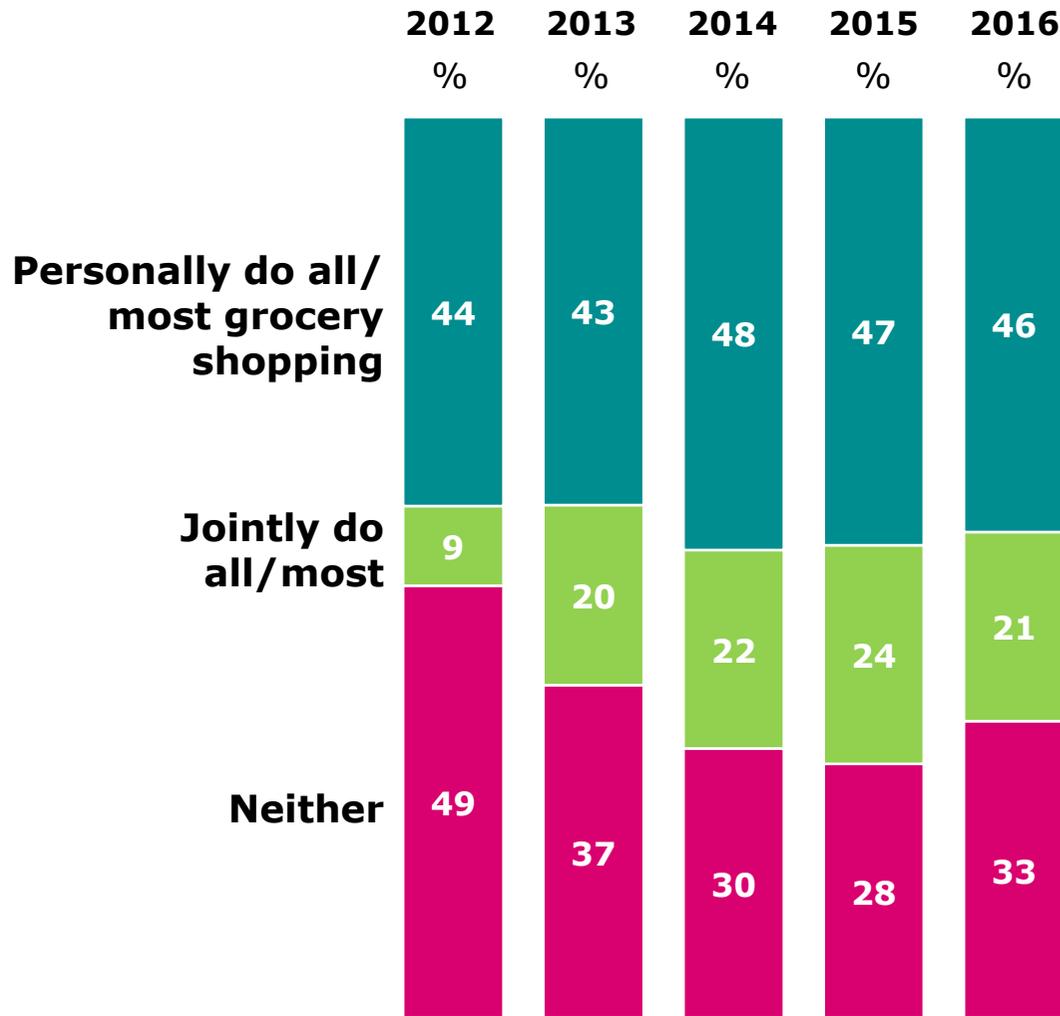


A woman wearing a white sweater is shown from the side, writing in a notebook with a pen. She is in a grocery store aisle, with shelves of products visible in the background. The image is partially covered by a teal overlay on the right side.

*“I love smart shopping. You get better deals and bargains when you shop around and you can get good quality for less. I won’t go back to the way I shopped before.”*



# Men are considerably less likely to be the main shopper



All grocery shoppers: 687



Q.1

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

Source: B&A Retail Deep Dive, Sept 2016

# Discounters are mainstream

**Multi-shop pattern**

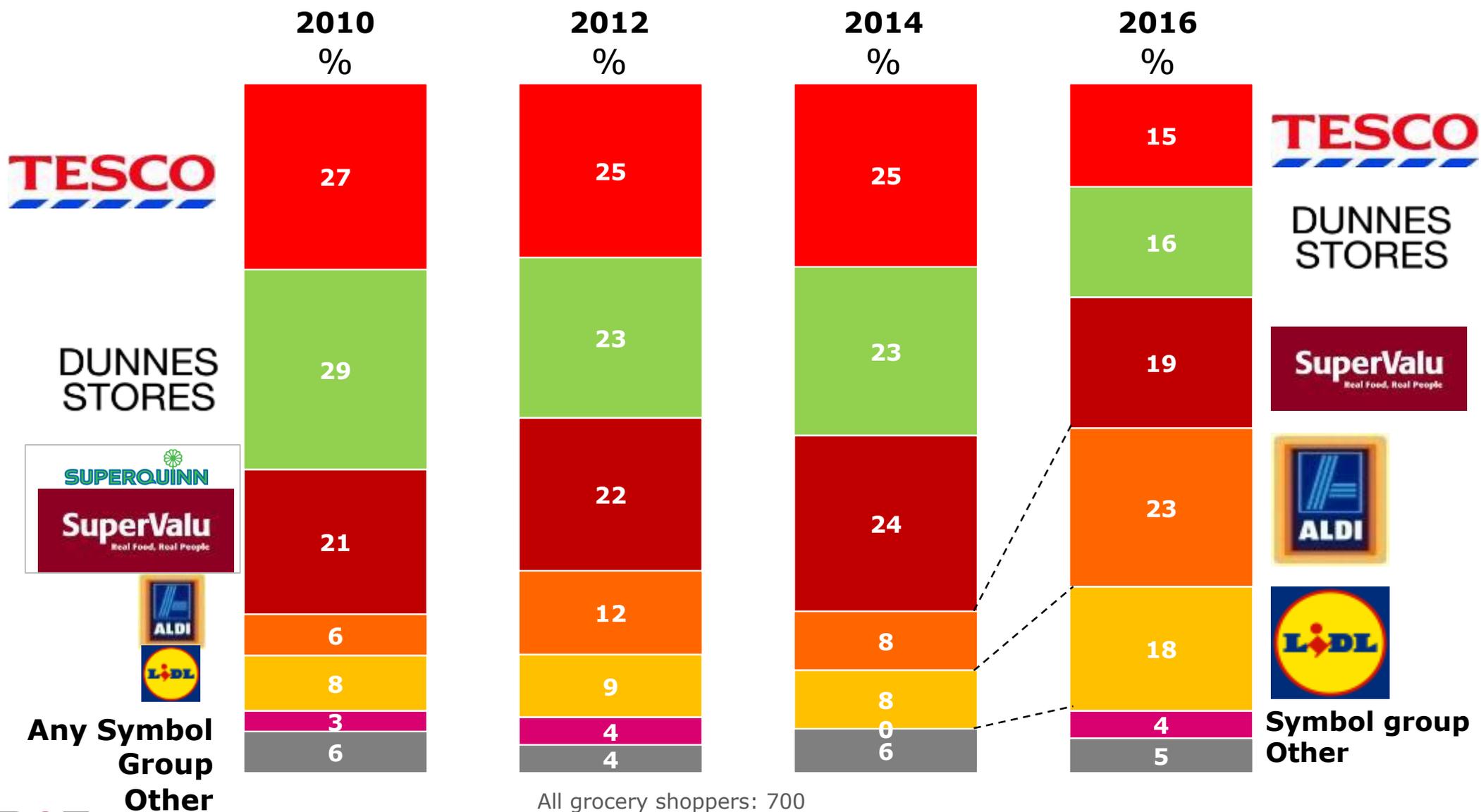
**'Anchor' shifted to Aldi or Lidl?**

**Private label quality accepted across categories?**

**Love my discounter!**



# Aldi & Lidl totally embedded in the grocery shopping repertoire



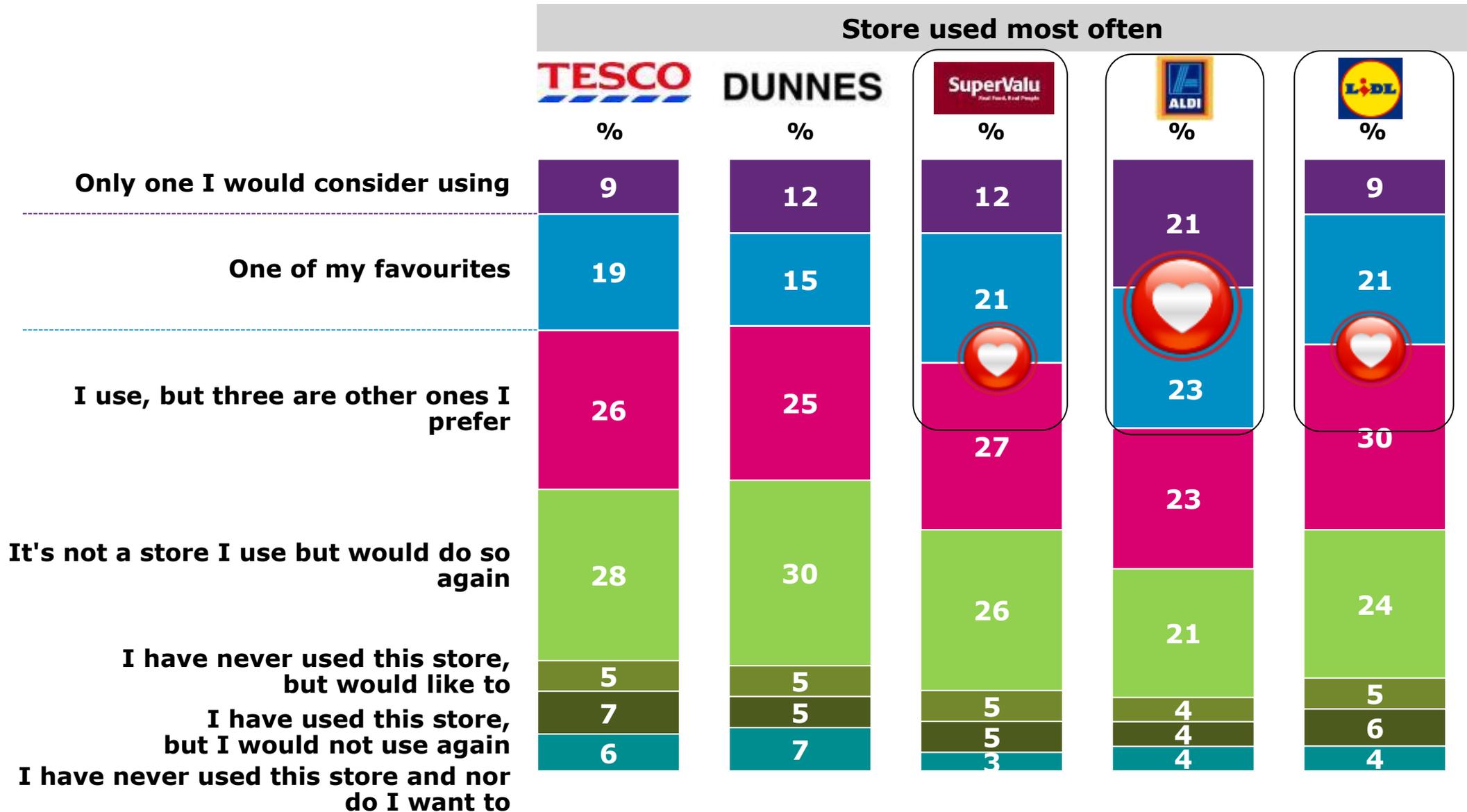
All grocery shoppers: 700

Q.2c

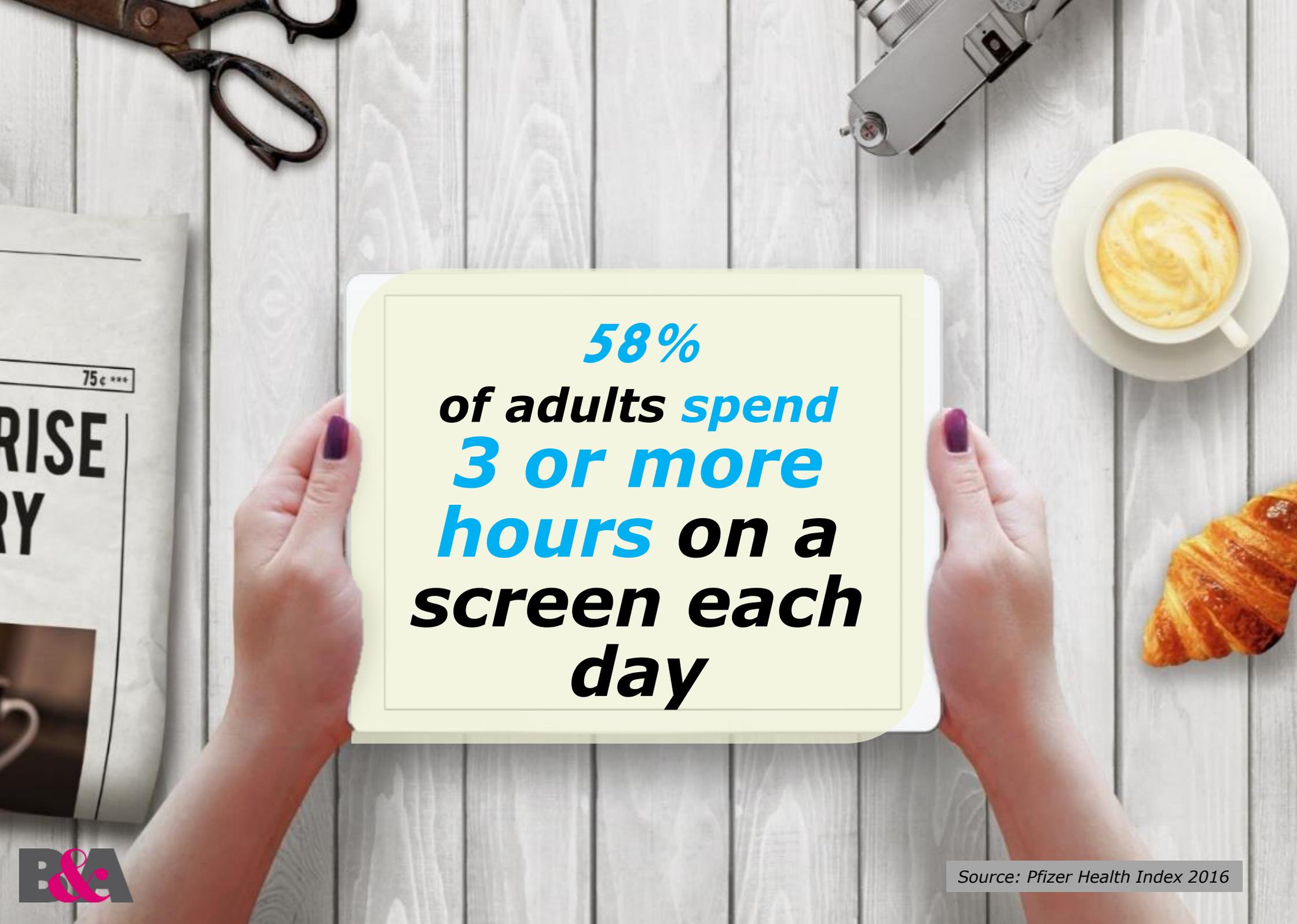
And which one of these stores do you use MOST for your grocery shopping?

Source: B&A Retail Deep Dive, Sept 2016

# Startling emotional affinity with Aldi



\* = July data



**58%**  
**of adults spend**  
**3 or more**  
**hours on a**  
**screen each**  
**day**

# Technology we love...and fear

**Bullying kids?**

**Separating or connecting  
us to each other?**

**Immediate  
gratification...never  
gratifies....**

**Reasserting real**



*“Kids’ hatred towards each other - a lot of it stems from online. Social norms are not there. Kids can be very brutal.”*





*“I have a few friends who have done this cleansing thing with phone technology in a drawer for the weekend. I think that’s great...but I don’t think I would be able to do it.”*



# Screen time per day

Base: All adults 16+ 1,027/3,551,000

**Self**  
2 hours  
57 minutes

**Partner**  
2 hours  
44 minutes

**Eldest Child**  
2 hours  
16 minutes

**Second Child**  
2 hours  
10 minutes

**Third Child**  
2 hours  
16 minutes

**Where is most of our attention most of the time?**

Q.24

How much screen time do you think that .....have per day on average?



Source: Pfizer Health Index 2016



*“Anytime we go out for a treat you see parents have brought tablets and give them to the kids. They can have a conversation and don’t have to entertain their kids – it drives me mental.”*



# Irish Culture around us

**Integrated new Irish?**

**Community disconnected?**

**Next generation  
disengaged?**

**Unfairness**

- Bank bailout
- Vs austerity

**Technology fixation**



# What it means to be Irish

Autonomy ...or  
dependency?

A view from there...

For the craic!

Rule setting or  
bending?

New & modern or  
stuck in the past?

How far have we come?



# The view from there?

It is often from outside that we see 'Irishness' more clearly:



The afterglow of Euros was about 'good times' Irish (unlike the fighting English and Russians!)



The slap down from the EU over Corporation Tax ...are we still the cute hoor?



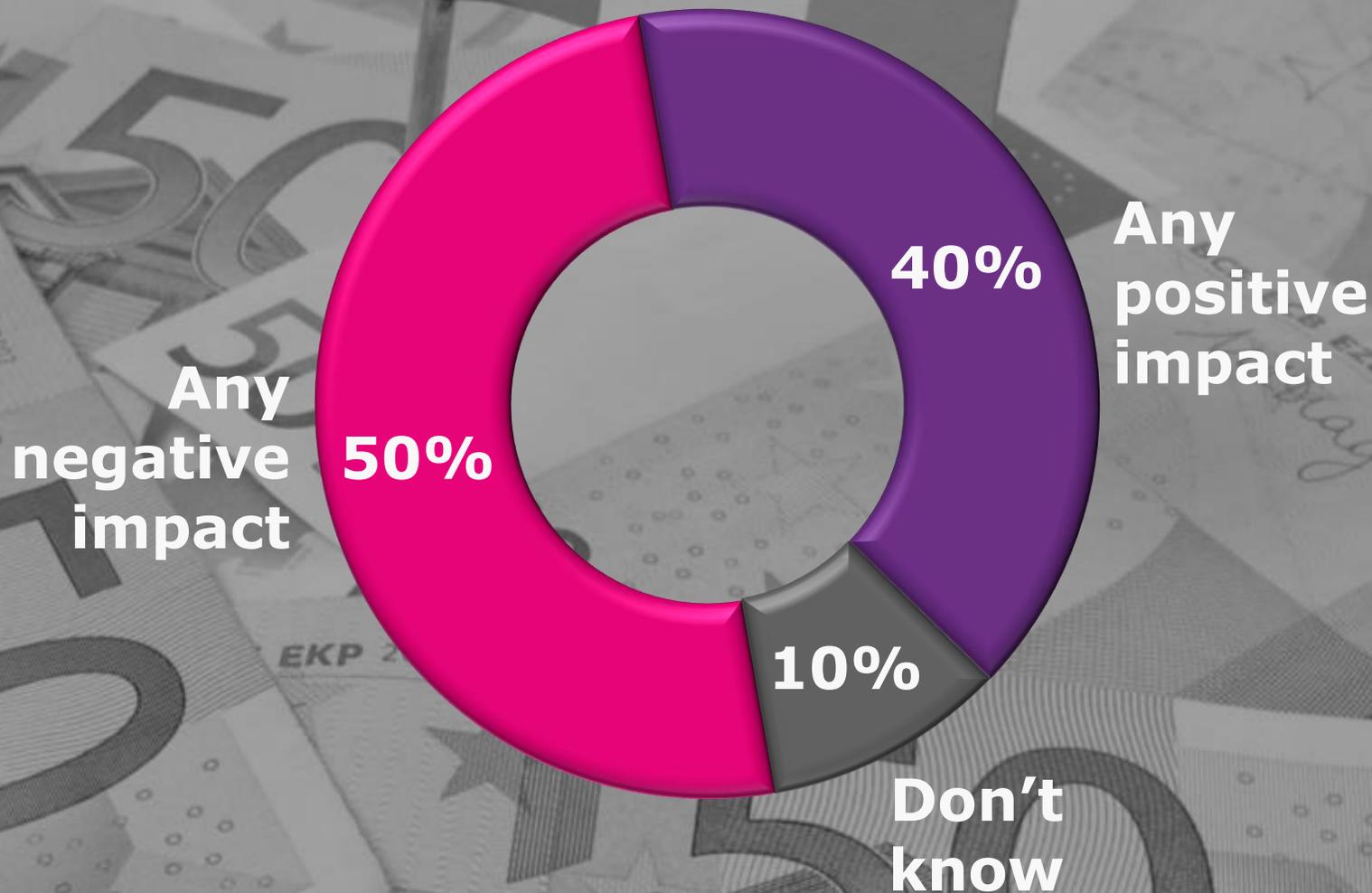
Pride in the same sex marriage referendum....

..shame in our fudging of abortion legislation.



# Half of us are concerned about the financial impact which Brexit may have on our personal finances

Base: All adults 16+ ~ online 509



Q. How concerned are you about the possible impact which Brexit will have on your personal finances?

# Pending Brexit fears....



Return of violence in NI

Irish Workers in Britain being forced to return home

Difficulties in trade between Ireland and Britain

Difficulties in purchasing British made goods online

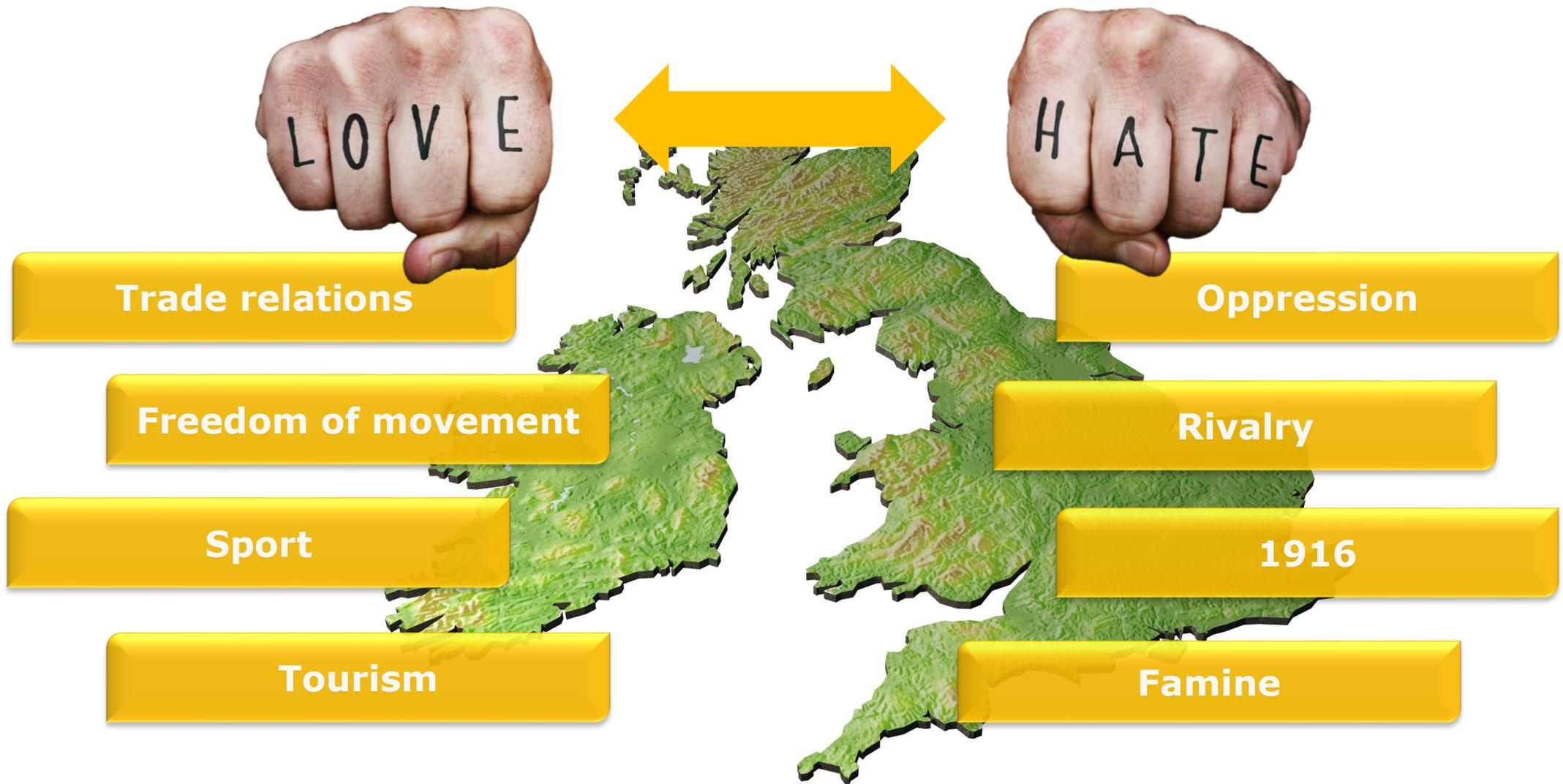
Increasing prices of British made goods

British made goods becoming unavailable in the Irish market

Physical boarder between ROI and NI

**More than financial concerns?**

# We have a conflicted attitude to the UK...



**Brexit has highlighted our dependence (more than we might normally acknowledge)**



*“Britain is no longer a Superpower. The UK has gotten smaller with Brexit, but that’s bad for Ireland’s trade and exports.”*





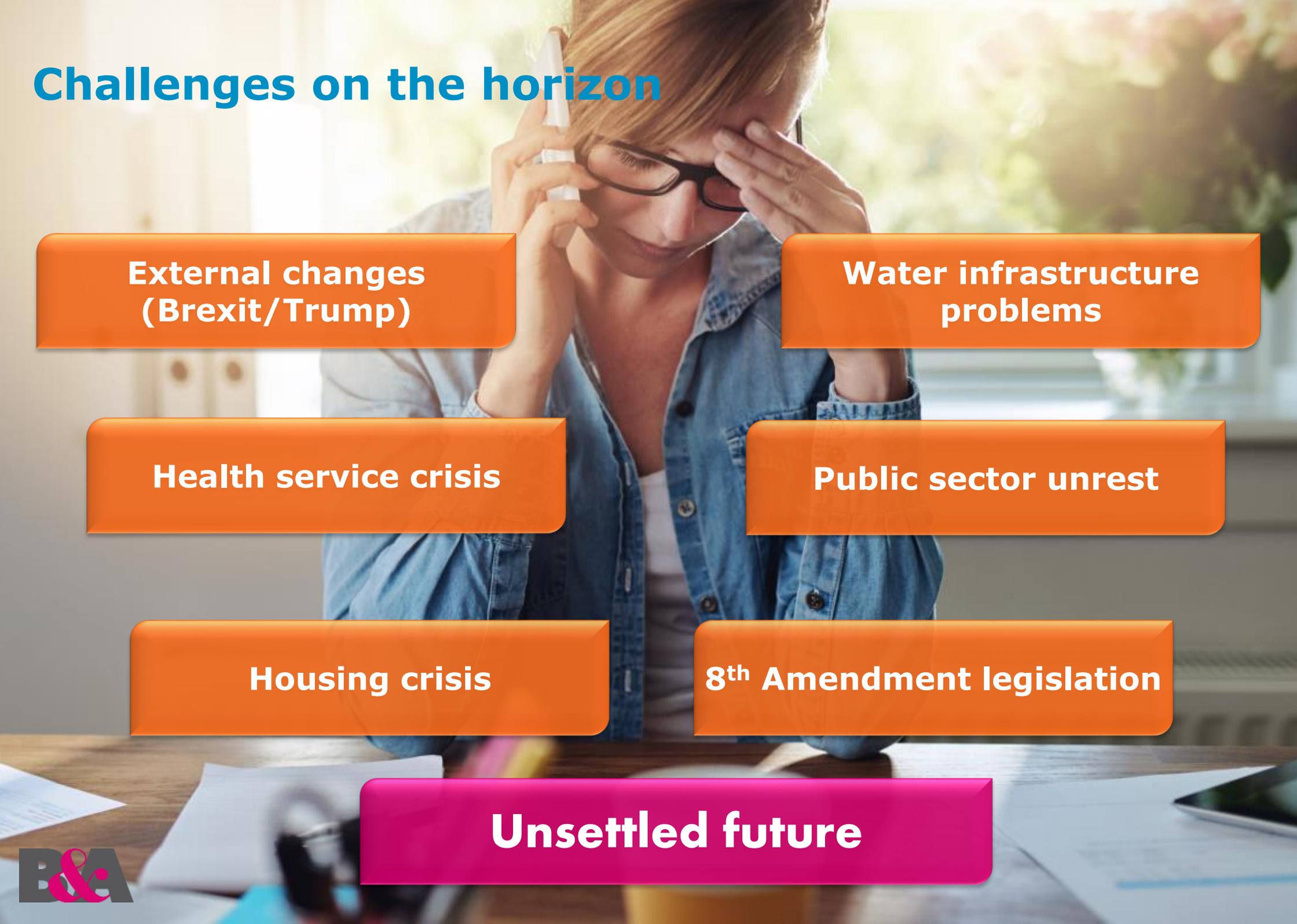
**bano ceannais**  
**na h-Éireann**

*“If Ireland left the EU we would be sending ourselves back to the 80’s, back to taxes on shoes.”*



21.10.81

# Challenges on the horizon

A woman with blonde hair and glasses is talking on a white mobile phone. She has a stressed expression, with her right hand covering her forehead. She is wearing a blue denim shirt over a white top. The background is a bright, out-of-focus indoor setting with a window and some greenery.

**External changes  
(Brexit/Trump)**

**Water infrastructure  
problems**

**Health service crisis**

**Public sector unrest**

**Housing crisis**

**8<sup>th</sup> Amendment legislation**

**Unsettled future**



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