



# Sign of the Times



# Sign of the times 2014

- This is our fifth annual review of consumer trends.
- It brings together a combination of primary research and observations from our in-house team.
- Six group discussions were conducted in January 2014 to probe consumer motivations and a series of quantitative surveys have also contributed to this report.
- If you have any queries or would like to arrange a run through of the full deck please contact us on 01 2057500 or mail us at [info@banda.ie](mailto:info@banda.ie).

# Key Headlines

- Are we there yet? - *belief and doubt about an upturn*
- A country divided - *city buzz and country cynicism*
- The view from here - *when the media view seems like another country*
- Retail shifts - *the rise of Aldi*
- Pride and shame - *being Irish in 2014*
- A three speed Ireland? - *who benefits, who is left out*
- Smartphone enabled lives - *but can we switch off?*
- Me TV - *more choice, less variety*
- Baby steps - *little indicators we trust*

# Local news



# International news



# Celebrity news



# In the frame!



***"We just want  
to believe it's  
going to get  
better. This is  
going to be  
the year."***



# So, are we or aren't we?

Want to  
believe in  
upturn ...

But diaspora  
wait and see...

***"It's not that you don't have the money, it's that you are always afraid of something going wrong somewhere down the road."***

# Stabilisation, rather than growth

More settled  
period

'The rot has  
stopped'

Caution

Equilibrium

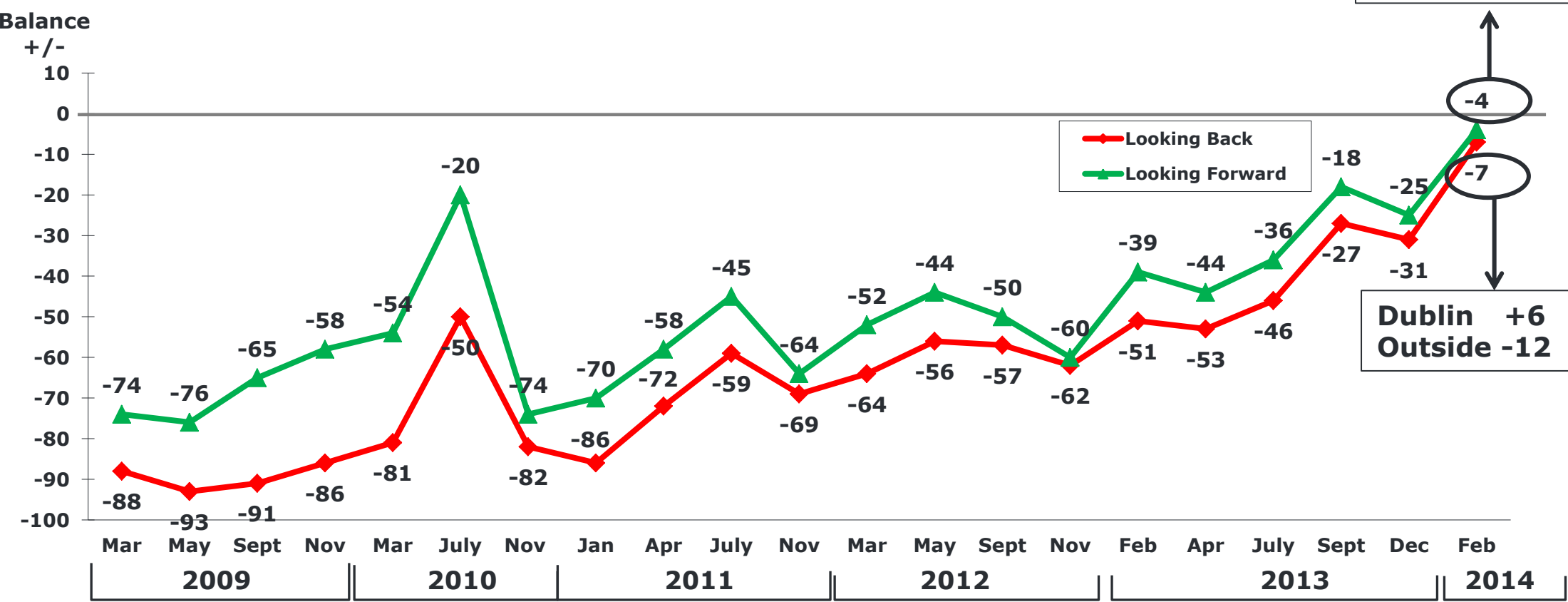


# Half full or half empty?

- When we review almost any market, we find variations are much deeper by demographics than previously.
- Social class divisions are deeper, and while everyone seems to be impacted by job loss, sense of job security, reduced income etc., this has persisted and deepened with working class and those out of work.
- There is also a distinct variation between Dublin, the commuter belt around Dublin and the rest of the country.
- In a similar way, young families with kids are often the most hard-pressed, caught out by negative equity, while young professionals and empty nesters (if they're still in work) have maintained some level of equilibrium.



# Ready to move on?



Dublin +7  
Outside -9

Dublin +6  
Outside -12

**Initial shock!**

- Just a 'speedbump'
- Will return to 'normal'

**Despair!**  
(IMF Bailout)

- Changing for good
- Value sought everywhere

**Readjustment**

- A 'new reality'
- Switch off to doom and gloom

**Towards positivity**

- Uplift in consumer mood pre budget
- But Dublin vs outside Dublin divide evident.

- Q.1 Thinking about the economy as a whole, do you think that the country is better off, worse off, or about the same as last year?
- 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?



# Under Pressure



**No jobs/  
No progression?**

**Employer Trust  
deficit**

**Caught out  
(generation)**

**No holidays**

**Hang on to  
'essentials'  
(PHI etc.)**

**Living on savings**

**No credit card, no  
direct debit**

***"You only have to walk  
up Harcourt Street on a  
Tuesday night and all  
the pubs would be  
heaving."***

# City Buzz

A vibrant night scene of a busy city street. The street is paved with cobblestones and filled with people walking. In the foreground, a chalkboard sign on the left reads "MEXICO TO ROME EARLY BIRD €13.95 2 COURSE 12-7PM". The background features multi-story brick buildings with warm, glowing lights from windows and street lamps. A prominent red awning is visible over a pub entrance. The sky is a deep blue, suggesting dusk or early evening.

City life  
picking up

Restaurant  
Deals

Pub lunches

Unmortgaged  
spending

Return of the  
Native



# Cynicism evident...

"You read that stuff in the media alright, but I dunno, I don't see any of it around here"

Ireland Heads Forbes' List Of The Best Countries For Business

Noonan named top EU finance minister by 'Financial Times'

"Best country in the world to do business? Try getting a loan from the bank for your business and see how good it is"

ESRI predicts boost in GNP growth next year

"Look, it's good. It's better than the headlines we were getting, but we're only getting it 'cause we took our medicine like good kids..."

# In towns like Sligo...

# ...a sober reality

"Half the shops in Quayside are empty"

"People just don't have the money to go out anymore"

"Town is dead. The bars that used to be hopping – Fiddlers, The Garavogue – they're not half as busy as they used to be"



***"The Troika wouldn't mean anything to me, but the media were building it up as this is a very significant event."***

# A media recovery?

Wait and see...

Official figures  
don't connect

Are there signs I  
can trust?

# Pride & Progress

**Improved  
Road Network**

**Luas**

**Exiting Bailout**

**Bridges &  
Buildings**

**Investors'  
Return**



***"Listening to the radio in the car the other day and my son said I am never giving money to charity again. Listening to Rehab and she is getting €240,000."***

# Shame & Loathing

Charity top up  
anger

Not run  
properly

Tax Haven  
Ireland

PLEASE  
GIVE

Knee-jerk  
policies

Elite Protected

# 3 Speed Ireland?

Recovery is not equal...



Recoverers



Strugglers



Golden circle



***"We haven't had a holiday really in 5 years. I took the kids up to Donegal to stay with friends for a weekend last year but that was it. With the mortgage and the bills, you just can't afford to."***

# Strugglers



Lost job



Behind on payments

Poor quality jobs



Resentment

Getting on with it



Local town depressed

***"I've booked my holidays alright. It's the first thing I do in January! You have to have something to look forward to and we have the bit of money put aside for it so why not?"***

# Recoverers



Steady job



Retain smart shopper outlook



Hols and socialising



Cautious optimism



***"Best country in the world to do business? That's just typical, but it's just an elite who see any of that business. It's not ordinary people."***

# The Golden Circle



**Business/ civil service elite**



**Least affected by crash**



**First to benefit from growth?**



***"It's the people high up giving themselves money and then taking everything from the working people."***

# A word in your ear ....

**Invest in jobs**

**Less tax**

**Reopen Garda Stations**

**Sort out spending on cars etc.**



***“My husband’s office closed in March so our life has gone and we are struggling and we are living on savings...we thought at this stage in our lives would be sort of enjoyable.”***

# Changed Horizons



**Kids stay at home  
longer**

**Postpone real  
retirement**

**See the world and  
stay away**

**Stay in college**

**Care of elderly  
parents**

***"I went to SuperValu a few weeks ago for a shop...and I felt really guilty. I felt it was a treat because I didn't go to Aldi and do my main shop and then buy one or two things in SuperValu."***

# Grocery Trends

**Deal Blinkers**

**Discount Chic**

**Aisle End  
Myopia**

**Mainstream  
Guilt?**

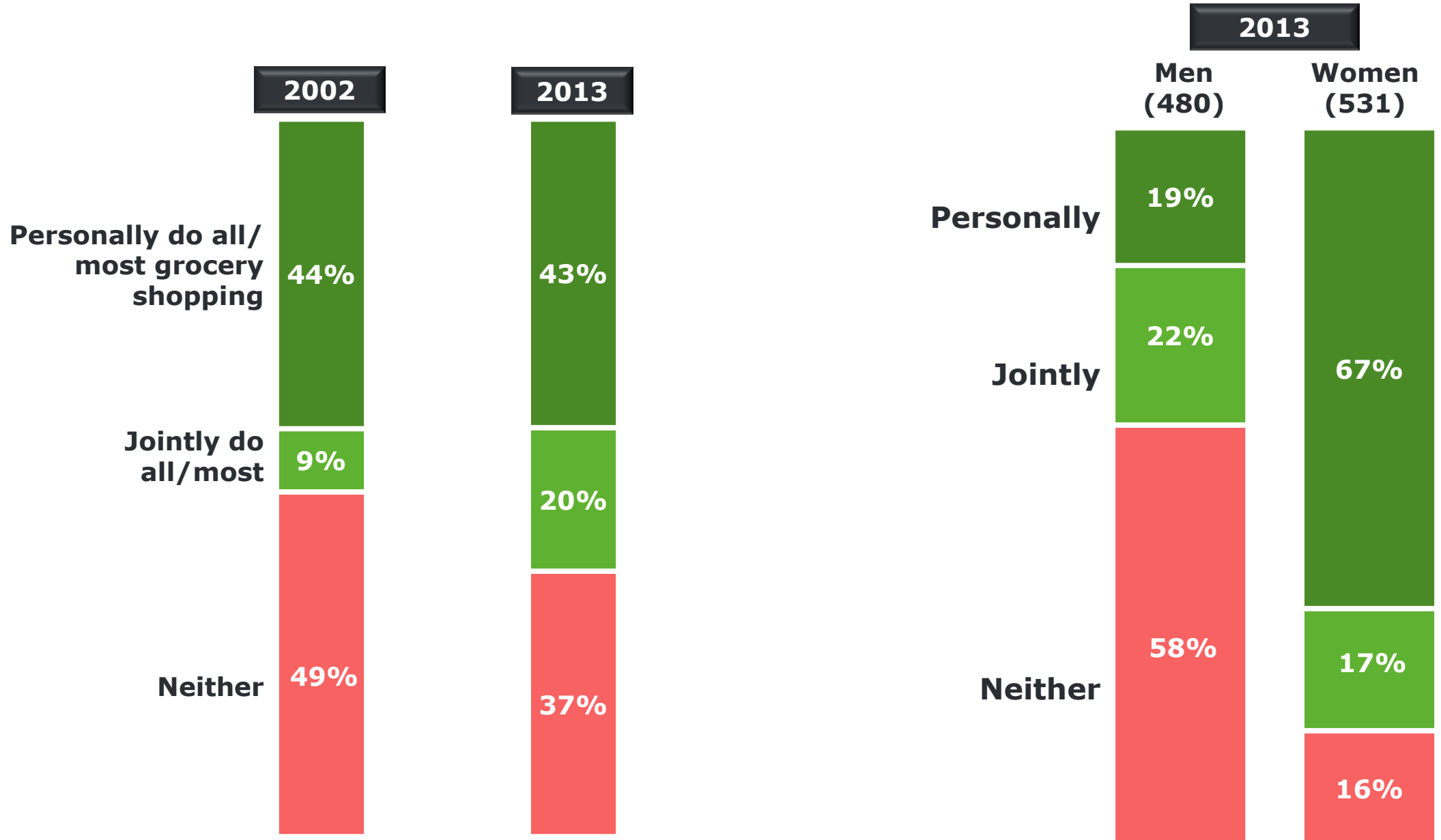
**Supermarket  
meat!**

**Offer route  
planning**

**Restraint &  
release**



# Responsibility for Groceries



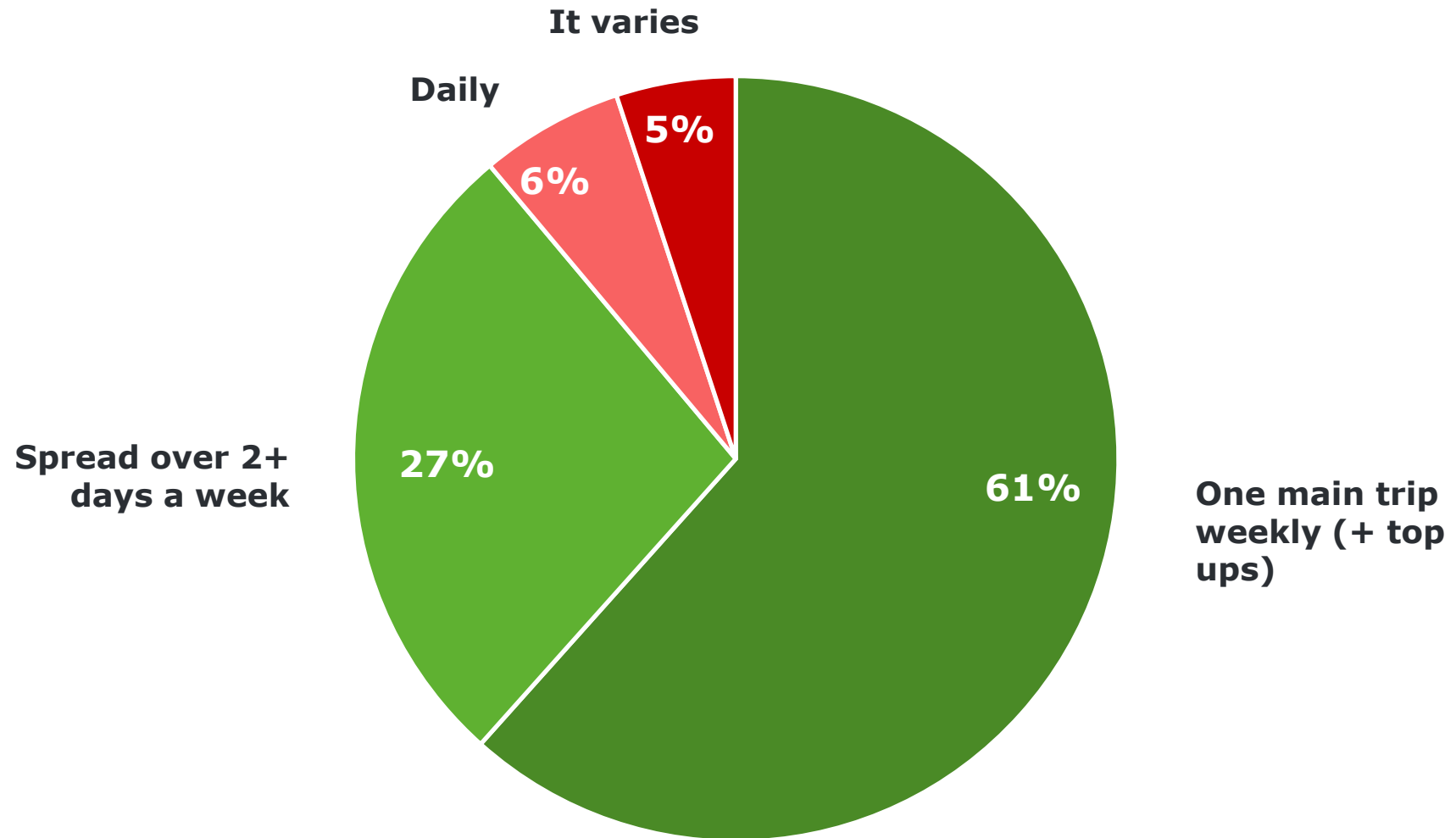
Source: B&A Grocery Shopping & the Discounters 2013

Base: All Adults 16+

Q. Are you personally or jointly responsible for grocery shopping in your household?



# Normal Grocery Shopping



Source: B&A Grocery Shopping & the Discounters 2013

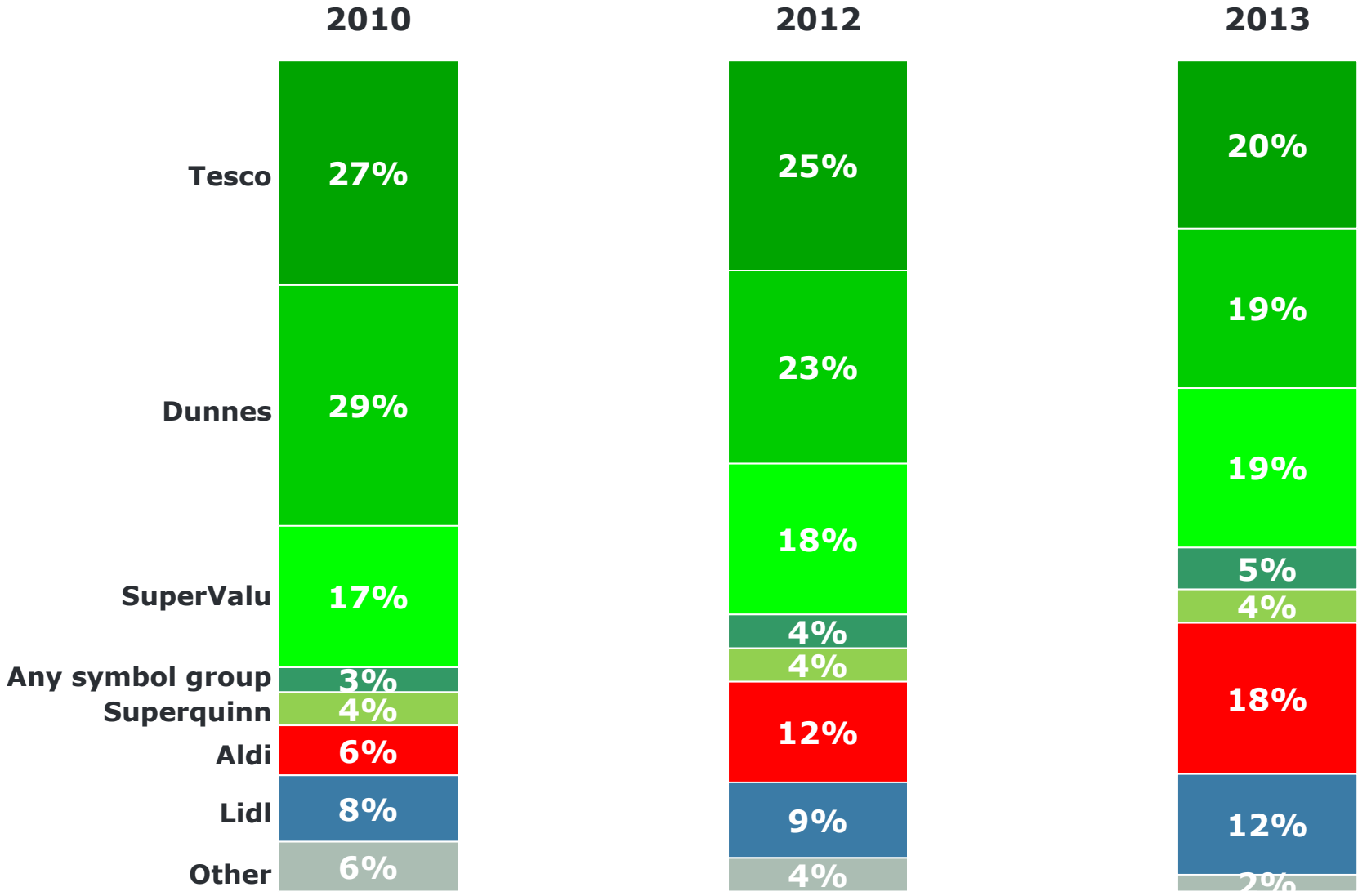
Base: All Shoppers - 662

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



# Store Usage

## Main Shop



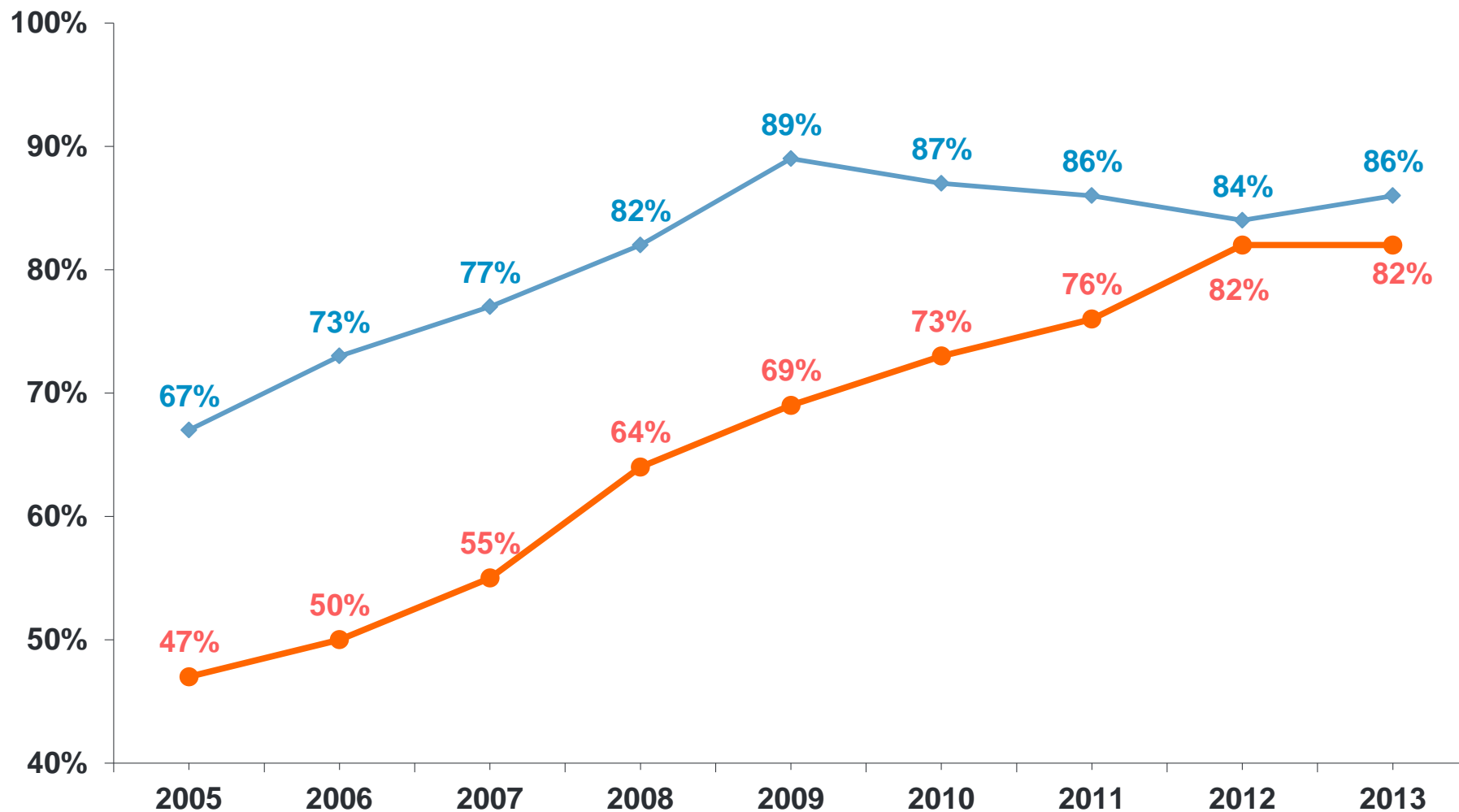
Source: B&A Grocery Shopping & the Discounters 2013

Base: All Shoppers - 662



Q. Which one of these shops do you use for most of your grocery shopping nowadays?

# Incidence of Visiting



Source: B&A Grocery Shopping & the Discounters 2013

Base: All heard of Aldi/Lidl - 658

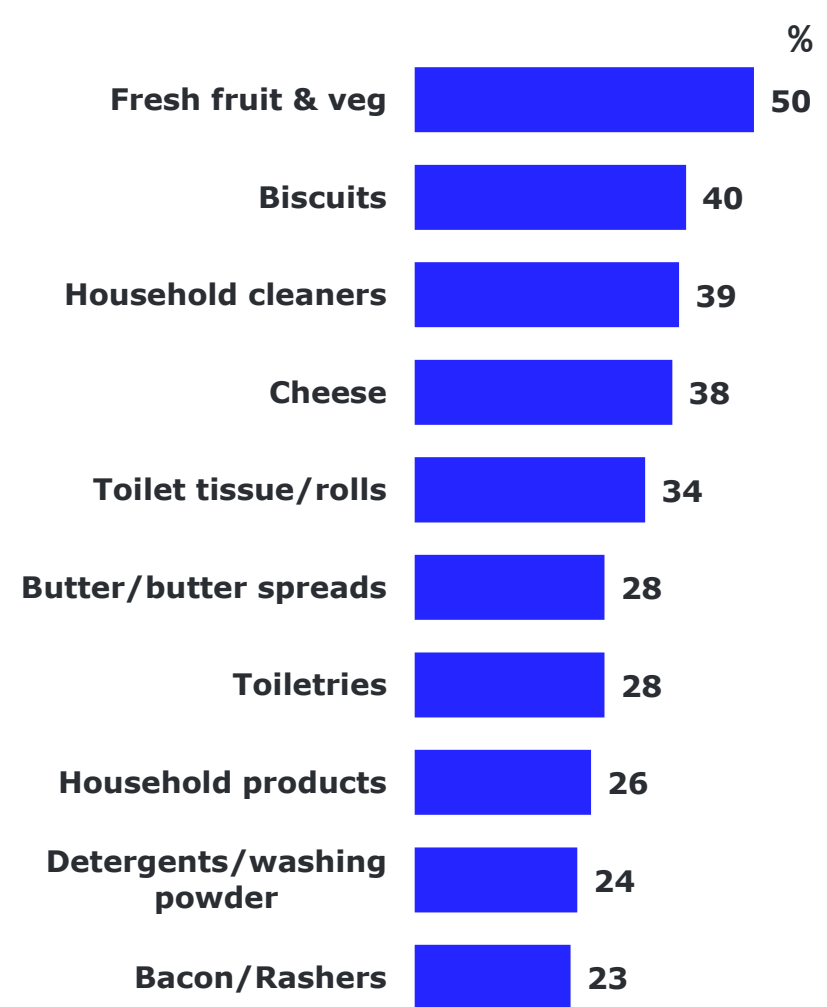
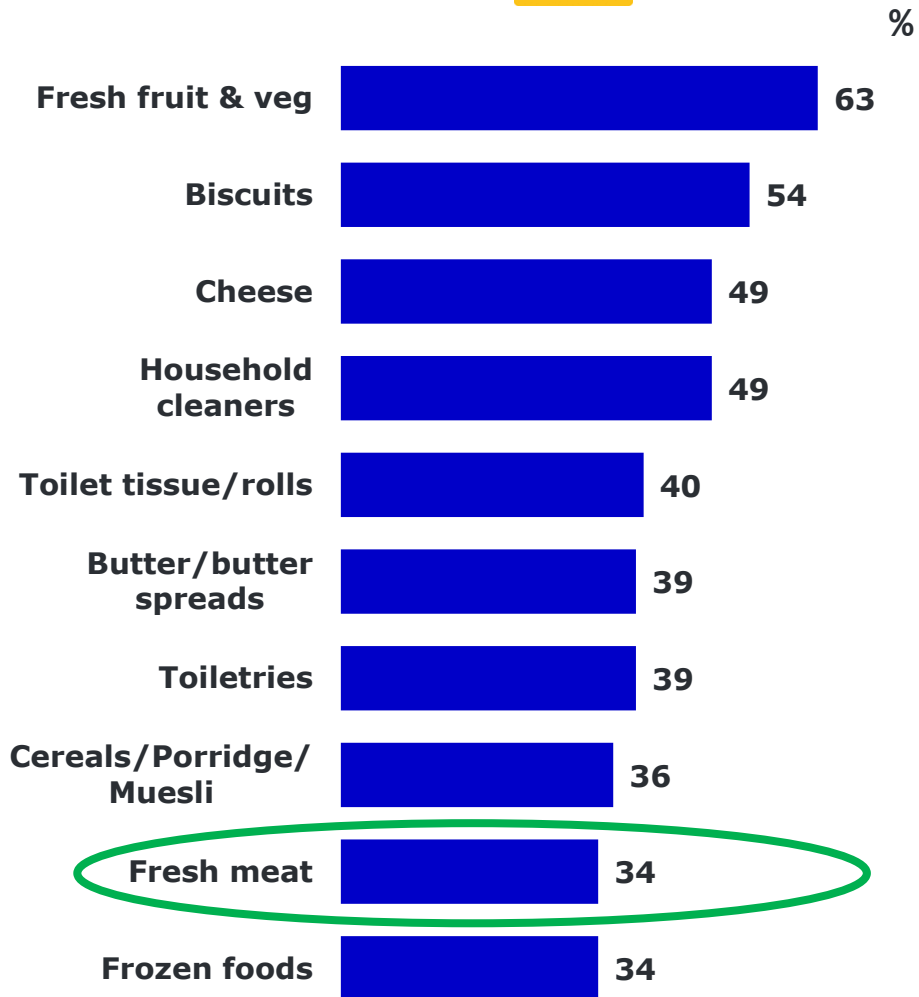
Q. Have you ever visited either of these shops before?





***"In Aldi sure the  
meat there is  
sourced from Irish  
farmers, you're still  
getting quality  
like."***

# Top 10 Items Bought



**Base: All shoppers of each store**

Q. Thinking about the last time you shopped in ..... (SHOP) can you list all of the items you bought on that occasion. Anything else?



***"Even when you hear something on the radio now, I think you are inclined to zone out and go straight to the internet, depending what it is, to see exactly what it is all about."***

# Online Anytime

Memory  
prosthesis

'Verify'  
news

Augmented  
reality

Wifi  
threshold

Personal  
portal

***“WhatsApp with friends  
in other countries is  
great; it is just like a  
chat with mates in a  
pub. It’s all the usual  
bullshit you talk.  
International bullshit!”***

# The New Pretenders

A third of mobile internet usage is email or social media.



***"With Facebook, I would just check in to make sure I am not missing something...it used to be you would spend ages on it.***

# Questioning Facebook



....just as mums and dads get the hang of social networking.





***"I mostly watch on demand or recorded live TV either streaming or Netflix."***

# Me TV

**Multiscreen  
Homes**

**Screen  
matching**

**Boxset  
Bonding**

**Live is special**

**Back up  
options**

**More choice  
...less variety?**

# Exponential Change



**Too much choice?**

**61% have a  
smartphone  
(86% of 16-24s)**

**40% have access  
to a tablet (up  
15% in 6 months)**

**Smartphone  
ownership doubled  
in a year and half**

**Source: eircom home sentiment survey**

# Technology trends

**64% access the internet daily (95% amongst 16-24s)**

**Facebook growing with 35+, in decline with under 24s (no longer seen as 'cool')**

**83% of parents agree their kids know more about technology than they do**

**93% view programmes on TV 22% now use portable device**

**The average age for a child to influence technology decisions is 10**

**WhatsApp up 35% and Snapchat up 89% in 6 months**

**93% of students/52% workers use digital devices while commuting**

# Online identity

59% of 16-34s sent a wrong text symbol (i.e. emoticon)



50% parents of 5-17s searched online to diagnose symptoms when child feels ill



54% of 16-24 year olds posted embarrassing pictures of friends on Facebook



43% of 16-24 year olds talked up social life online so it seemed better than it was



# Top TV



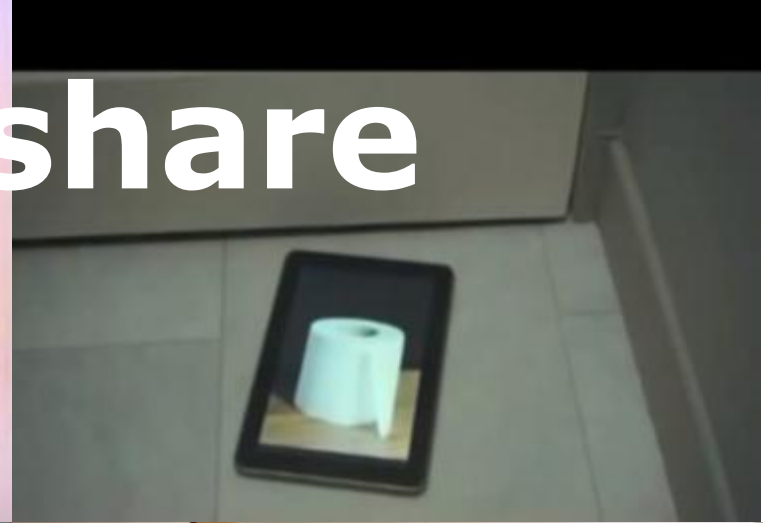
Big budget USA shows dominate with a few more local in the mix. Soaps key, but less talked about. X Factor showing signs of age.



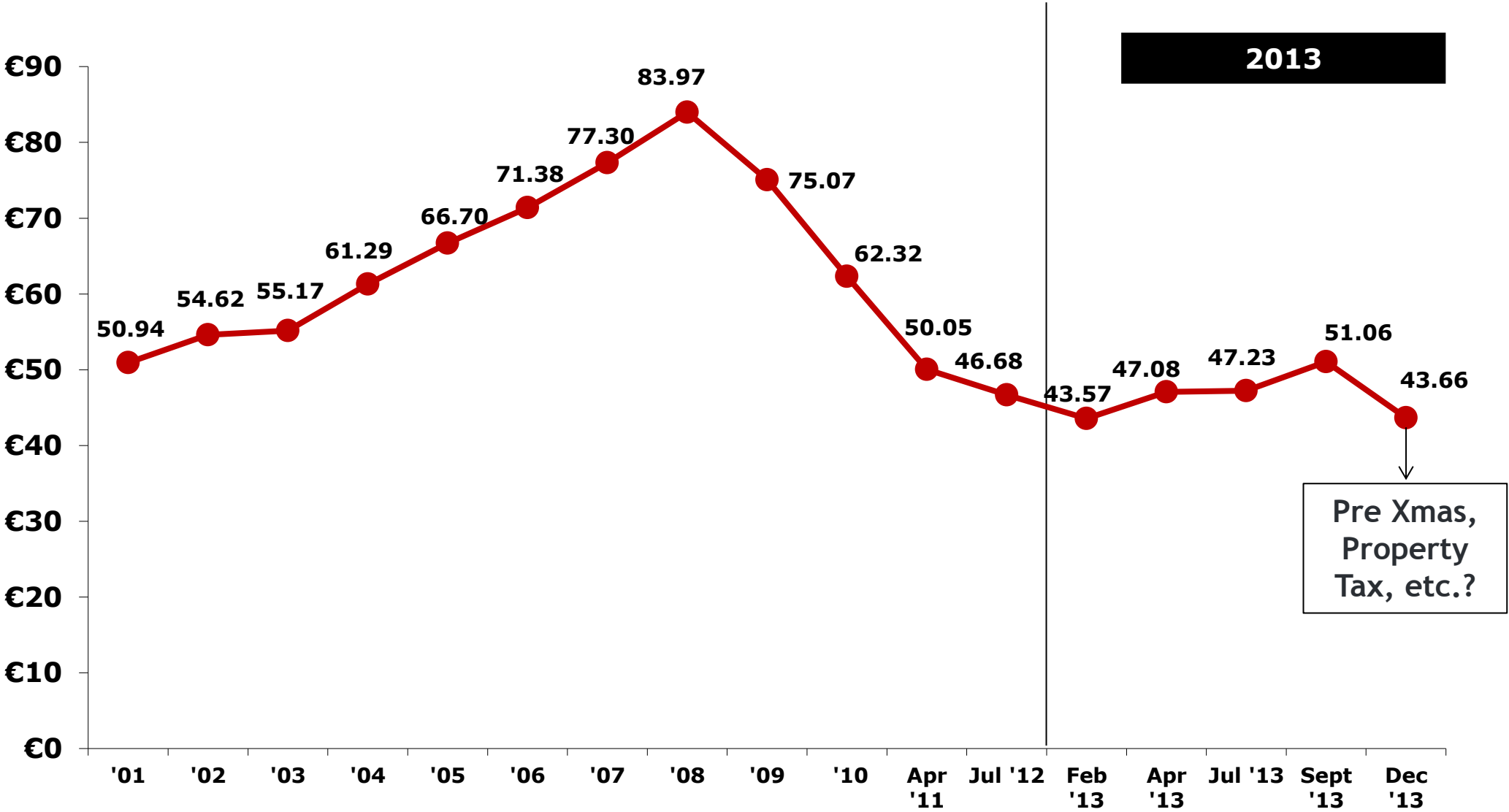
# Advertising Mindshare

Big international campaigns more to the fore.

Polarised reactions to 'silly accent' Irish campaigns.



# Discretionary € easing?



Q. About how much would you say you spend each week on things you buy for yourself including money spent on clothes, eating out, going for a drink, going to the cinema, gambling, sporting activities and so on?

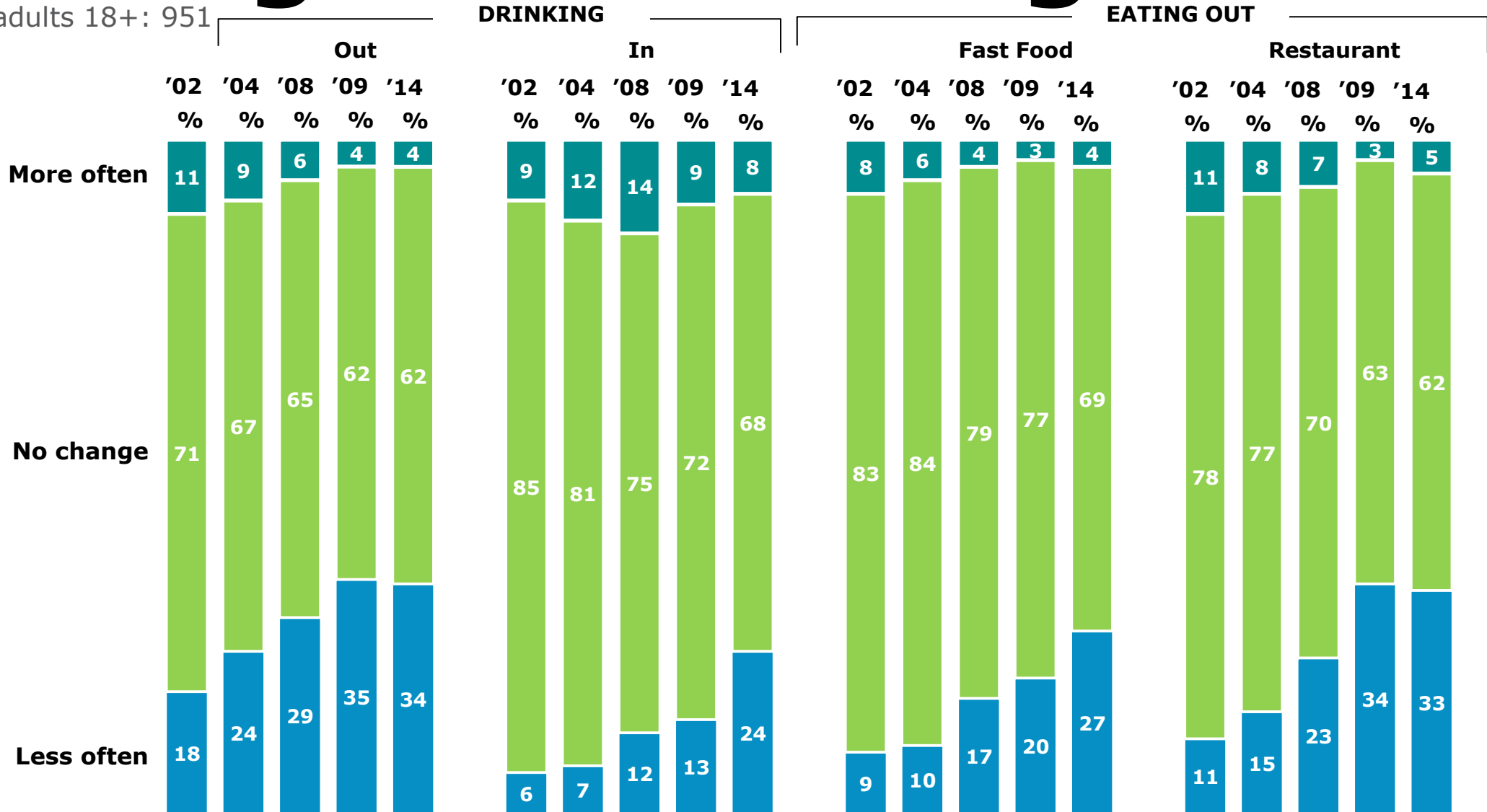
Base: All adults 18+





# Eating and drinking

All adults 18+: 951



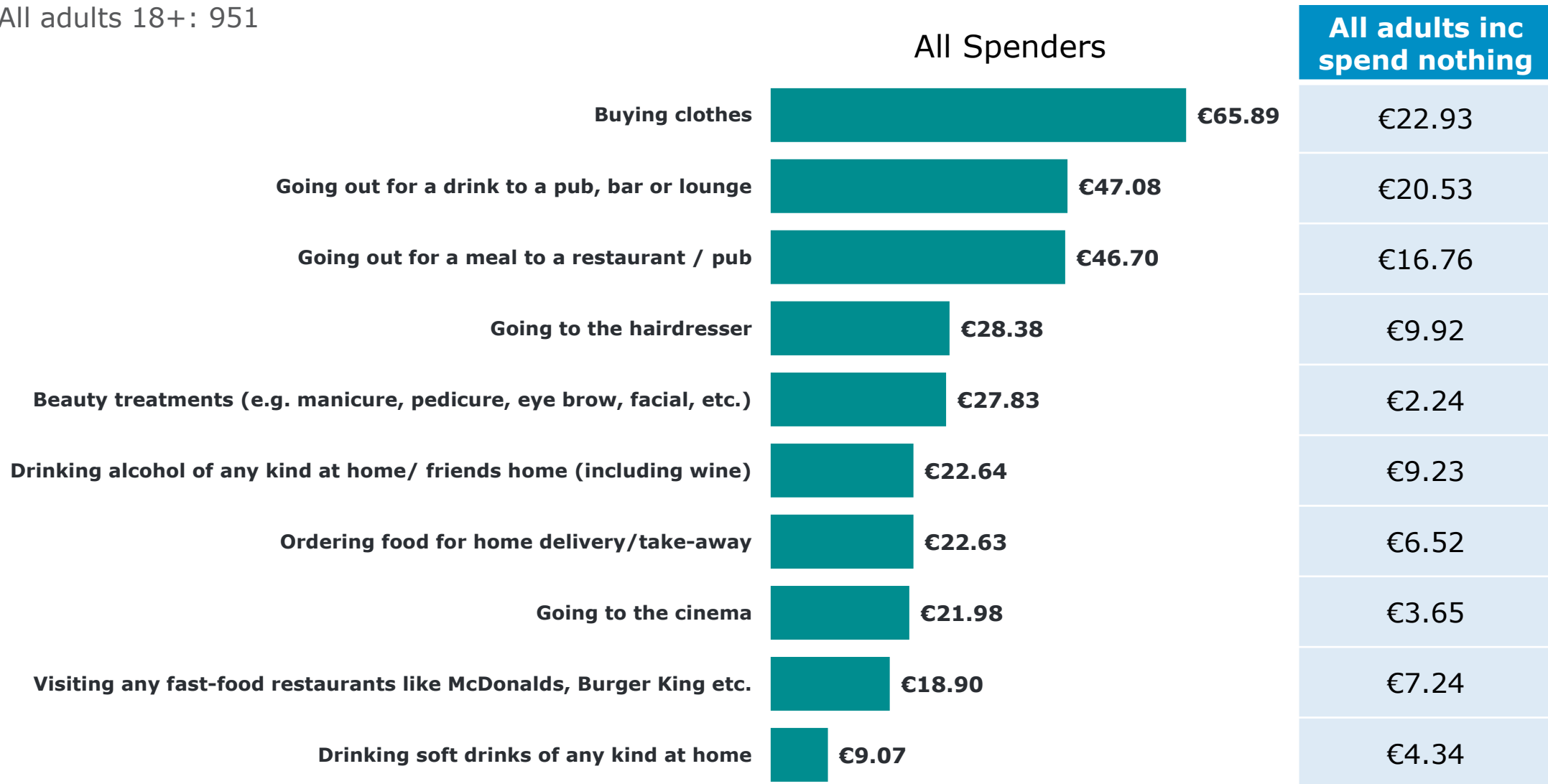
**Balance (more minus less)**    -7   -16   -23   -31   -30    +3   +5   +2   -4   -16    -1   -4   -13   -17   -23    =   -7   -16   -31   -28



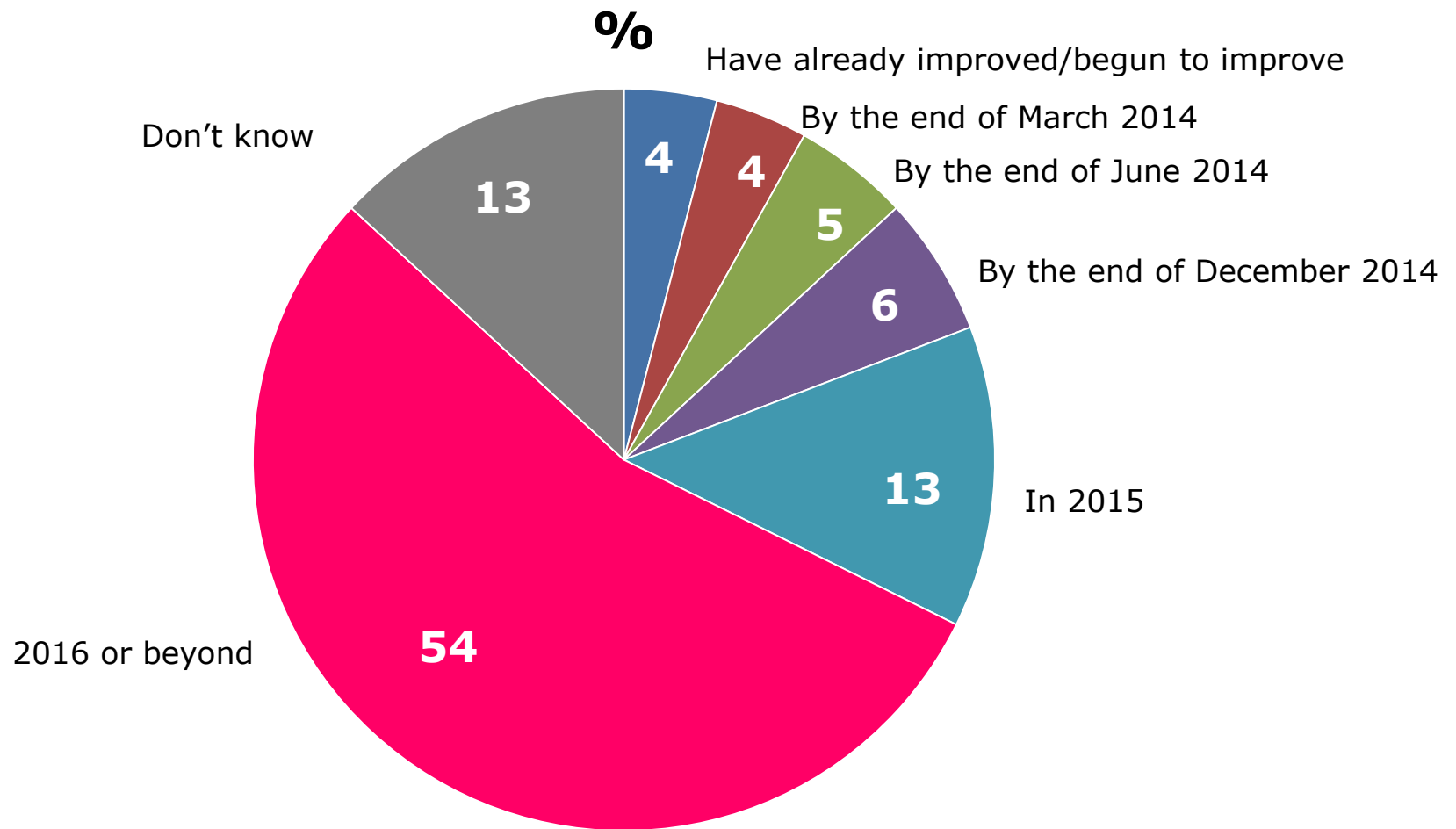
Everything felt to be in decline, even drinking at home is losing its gloss.

# Spending per fortnight

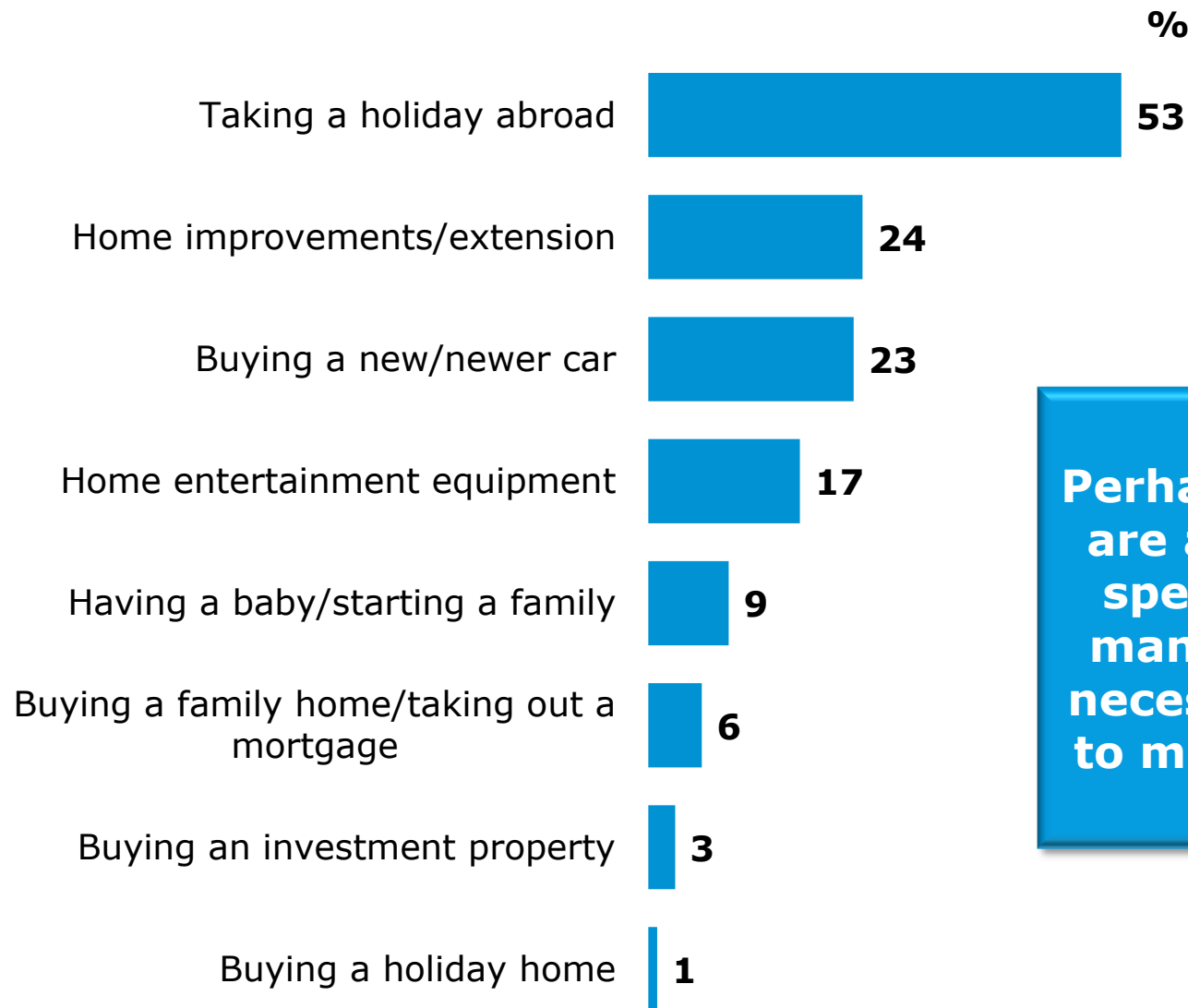
All adults 18+: 951



# When things improve



# Events In Next 12 months



Perhaps a sign that people are anticipating 'normal' spending. However for many there is a sense of necessity in being 'forced' to make these purchases.

Base: All adults - 934

Q. And which of the following are you planning to do over the next twelve months or so?



***"People are  
buying massive  
televisions and  
going out in 10  
year old cars."***

# Little indicators we trust

Good  
summer

Investment  
in Ireland

Short breaks  
perception

Pubs  
opening  
again

Rent going  
up

Newer car

First time  
buyers

Just got  
used to it?

Back to the  
dentist

Weddings

# Thank You



**BEHAVIOUR & ATTITUDES**

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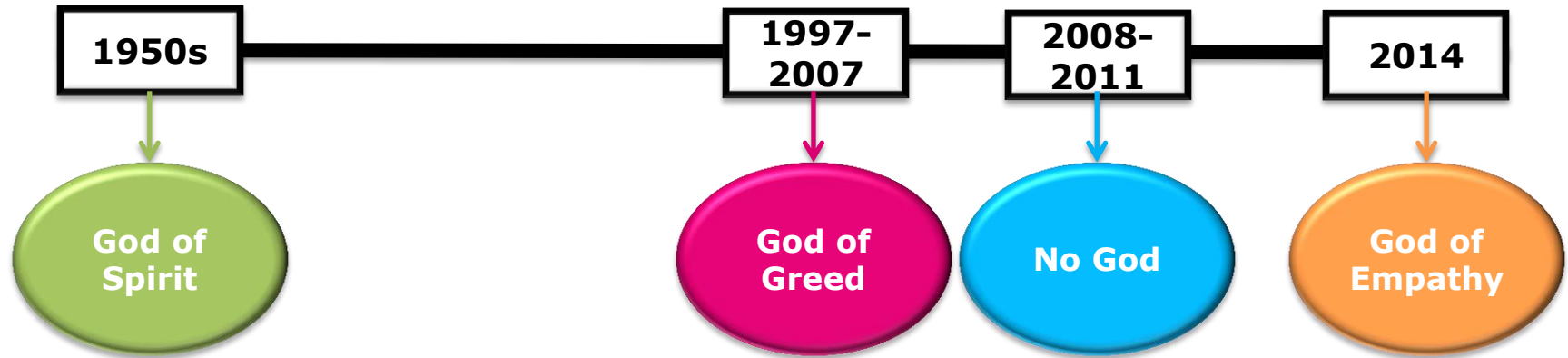


# Sign of the Times





# The Changing Attitudinal Landscape



**Manifested in.....**

Community spirit  
 Familial spirit  
 Pride of place

I'm worth it  
 I deserve it  
 I've earned it

Trauma  
 Disbelief

Re-establishment of trust

**Impact on Brand Communications**

**Powers**...pride in place  
**Budweiser**...frontier spirit (not brash American)  
**Barry's Tea**....intimate familial connections

**Belmayne**... gorgeous living  
**L'Oreal**... because you're worth it

**All brands**... value offers/ discounting

**McDonald's**... Bord Bia Quality  
**PTSB**... Back to basics



# Are we there yet?

*"The Troika leaving is a stepping stone, isn't it? It's only a gradual improvement. It's not going to have an immediate impact on everyone, it's not going to benefit the whole country straight away."*

*"You don't feel as bad now buying a new car."*

*"The Seanad Referendum....I can't even remember what I voted to be honest."*

*"We try to go out every 6 months – keeping it together."*

*"A good few new places have opened up in the city centre in the last few months, and people are going."*

# Connected lives

*"I chat to my friends everyday in New York, New Zealand, everywhere in the world. It is as if they could be in Rathmines."*

*"Everybody on Facebook seems to have a fantastic life. Everybody seems to be terribly witty and that. But I wonder what's really going on."*

*"Smartphones are necessities because you have everything on it like, you have your bank, your email, Facebook & phone."*

*"Someone in our office asked the whole office does anyone have a Nokia charger and everyone laughed at it."*

# Strugglers

*"They can talk about confidence and spending returning but I'm not seeing it...Sure Quayside (Shopping Centre, Sligo) is virtually empty at this stage."*

*"I was making over a grand a week, easy. It was simple at the time, but it was just spend, spend, spend....I'm working at a gym now for barely over €150 a week."*

*"The main streets (in Sligo) are dead. You've student pubs doing okay – they always will – but the Garavogue and Fiddlers that would have been mobbed a few years ago are fairly quiet now....People just don't have the money."*

*"They've been sneaky so they have in letting people on full time jobs go and replacing them with part-timers or temp. staff. So they get the same work out of you for half the money. It's a disgrace."*

# Emergent Recoveries

*"I'd be a bit worried still...although my husband's an electrician and he and 2 others all got new 131 vans there recently, so the company must be confident that things will improve. He's very busy anyway, so please God that will continue."*

*"You can see Dublin picking up alright, definitely. There's a buzz about the city centre, you could see it at Christmas, the pubs were stuffed."*

*"House wise it's still not great, it's not worth nearly what we paid for it. But we're on a tracker so that's good and we both have jobs so things aren't too bad....we're more careful with our money though."*

# The Golden Circle

*"I don't know who is earning money, but it's not me. The politicians still seem to do alright for themselves though don't they."*

*"All those guys in the civil service who retired on fat pensions. It's a disgrace."*

*"Sure the Irish Water thing is ridiculous. The same guys who had huge salaries and then retired now all have new jobs and massive salaries again. It's jobs for the boys."*