Sign of the Times 2018

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Behaviour & Attitudes

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Introduction

- This is the 9th annual review of trends in Ireland from B&A.
- It brings together the best bits from primary research conducted in-house by our team of award winning researchers.
- In addition to updating our assessment of Irish culture, consumer trends and technology usage, this year we have been particularly interested to explore our nations pre-occupation with health.

Health, fitness and diet

- This report includes insights from 4 group discussions with consumers representing particular health cohorts (conducted in January 2018).
- And a series of one-to-one in-depth interviews with influential speakers on health, nutrition and wellness.
- It also includes key findings from a specially commissioned survey on health (conducted in November 2017).
- We have also drawn from other published material from the B&A library including:

Consumer Confidence (March 2018)
Techscape (February 2018)
Lifestyle trends (January 2018)
Pfizer Health Index (April 2017)

Qualitative research detail

MAIN GROUP SERIES

Sports / health participants	25-35 No kids	Female	BC1
Ingredient scrutinizers	36-45 Young kids	Female	ABC1
Strong interest in mindfulness/ yoga	36-45 As falls	Female	C1C2
Mainstream guided by concept of balance	46-60 Teen kids	Mix	C2

IN-DEPTH EXPERT INTERVIEWS

Miriam Brady	Vice President	Irish Yoga Association
Professor John Cryan PHD	Principal Investigator	APC Microbiome Institute of Ireland Cork
Orla Haughey	Senior Dietitian	Eye & Ear Hospital Dublin
David Flynn	Happy Pear	Inspirational vegan, best selling author and entrepreneur

Main themes

Entitlement & disappointment	High expectations are colliding with the need to compromise.
Other is better	We are proud to be Irish but we prefer something authentically **different**
Too many toxins?	The bewildering array of food information can leave us reeling
Health tribes	The dark underbelly of our fascination with health is social pressure to belong
Step off	In the frenetic pace of modern life many want a place of calmness
New faithful?	Avid diet followers exhibit signs of religious fervour
Feverously connected	Many express concern about technology addiction and we see early signs of change

Economy 2018

Entitlement and disappointment

Accommodation strain!

A new car?

Employee assertiveness

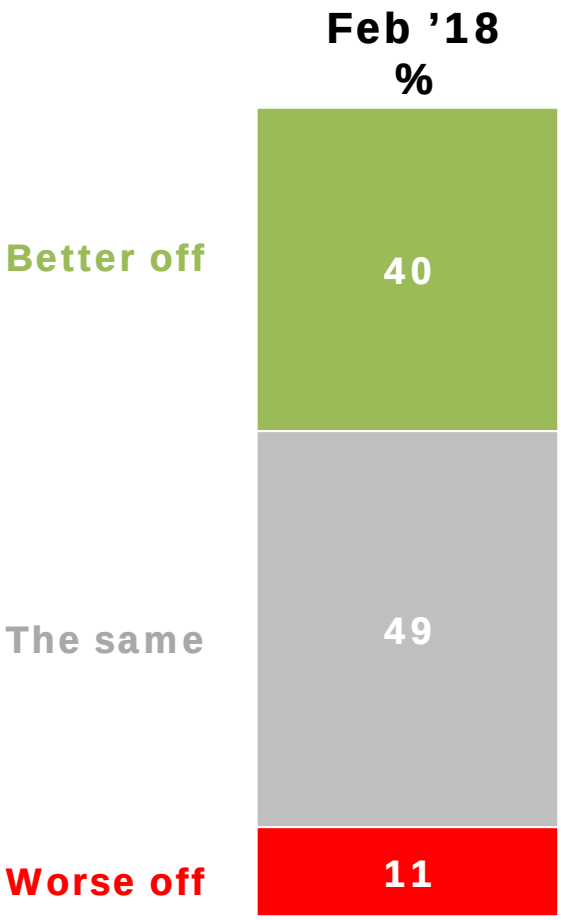
Expats long holiday over?

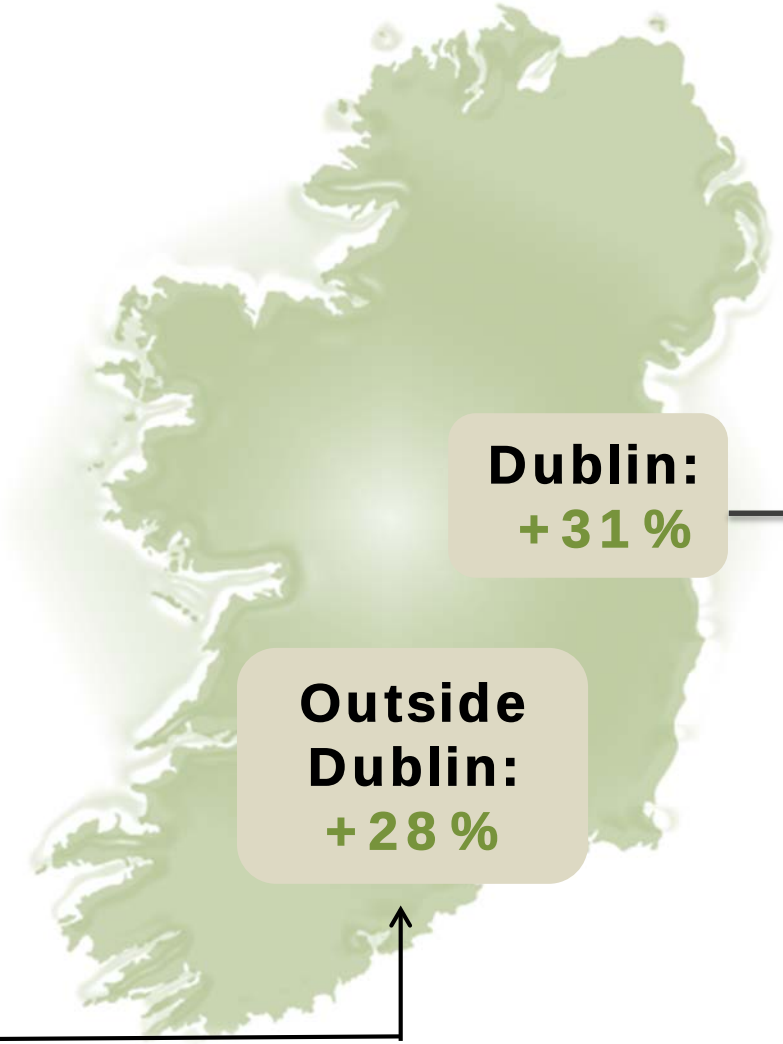
Public sector still under pressure

Long commutes

Infrastructure creating wider pressure

Consumer Confidence steady





Confidence gap has narrowed - driven by a improvement for C2DE and those outside Dublin

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Feb 18
Gap	=	-15%	-59%	-68%	-49%	-58%	-52%	-32%	+3%	+15%	+18%	+26	+28%

Source: B&A Consumer Confidence

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?

Improvement continues

The Live Register

-14.4%
Overall Change
vs. Feb 2017

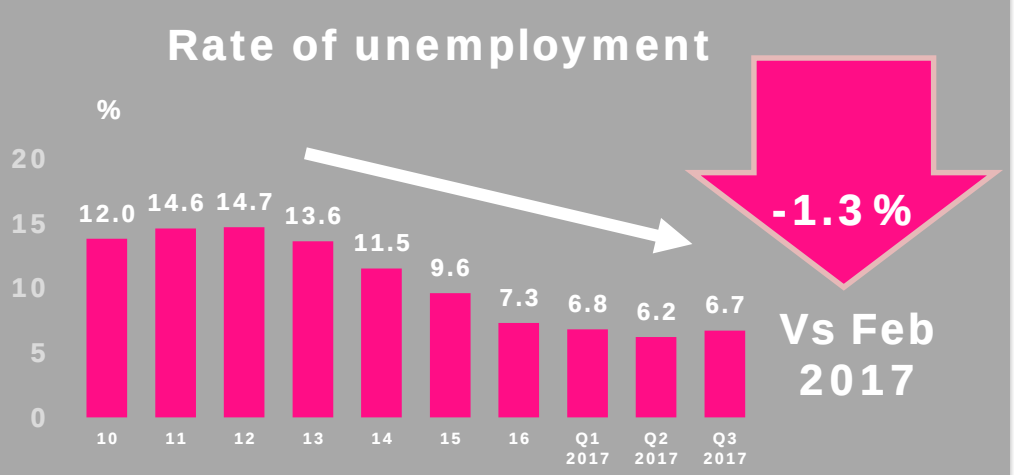
100,011

-13.3%
vs. Feb 2017

135,333

-15.3%
vs. Feb 2017

Unemployment in Ireland



6%

Current Rate of unemployment
(vs. 7.3% in Feb 2017)

Source: www.CSO.ie/Persons on live register
** Live Register Total data*

Source: www.CSO.ie/Quarterly National Household survey

Employee power

“There’s more job opportunities. This is my third job in the last 8 years.

The company I’m with now you get a pension, healthcare, dental and a wage increase every year.

Irish employees are worried about retaining staff now.”

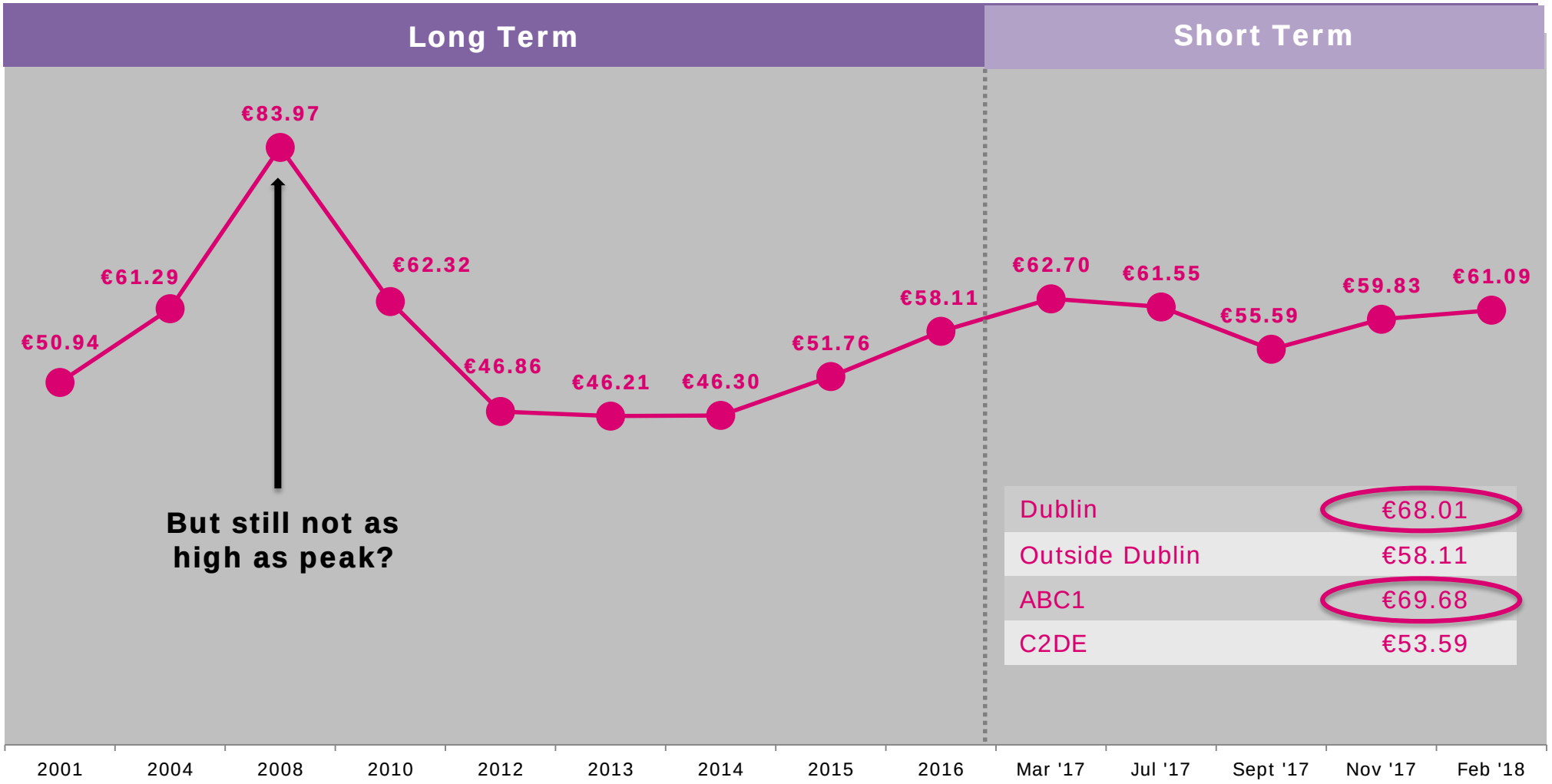
YOY trends positive across the board

Pharma & cosmetics	Clothing, footwear & textiles	Department Stores	Non-specialised stores (super-markets)	Food sales	Bar	Household equipment	Books, newspapers, stationary	Fuel
Up 7.6%	Up 5.7%	Up 8.2%	Up 5.7%	Up 2.1%	Up 2.2%	Up 13.7%	Up 2.5%	Up 0.4%
Up 6.0%	Up 1.8%	Up 4.0%	Up 4.7%	Up 5.5%	Up 4.9%	Up 8.2%	Up 3.4%	Up 3.7%

Source: CSO, Central Bank, European Commission

volume
value

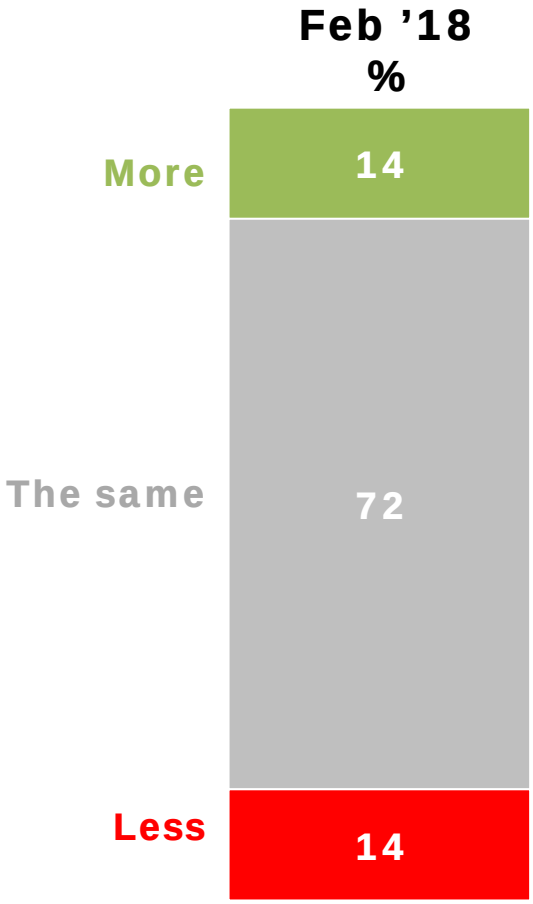
Perceived disposable income improves

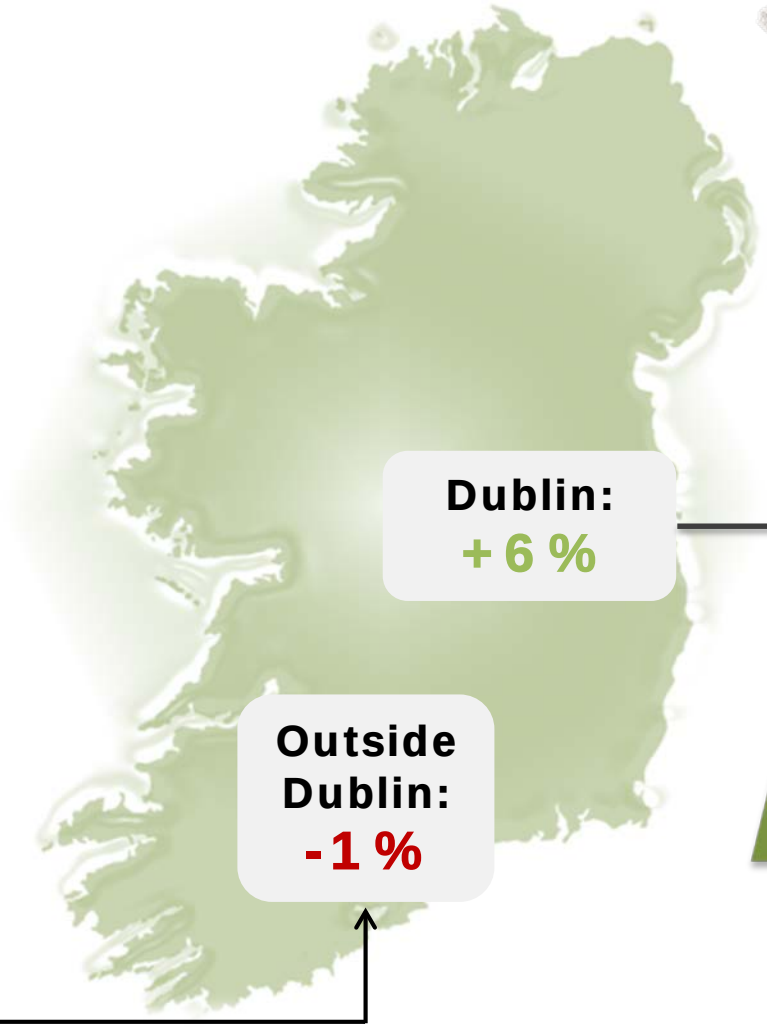


Source: B&A Consumer Confidence

Q.10 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?

Plans for purchasing





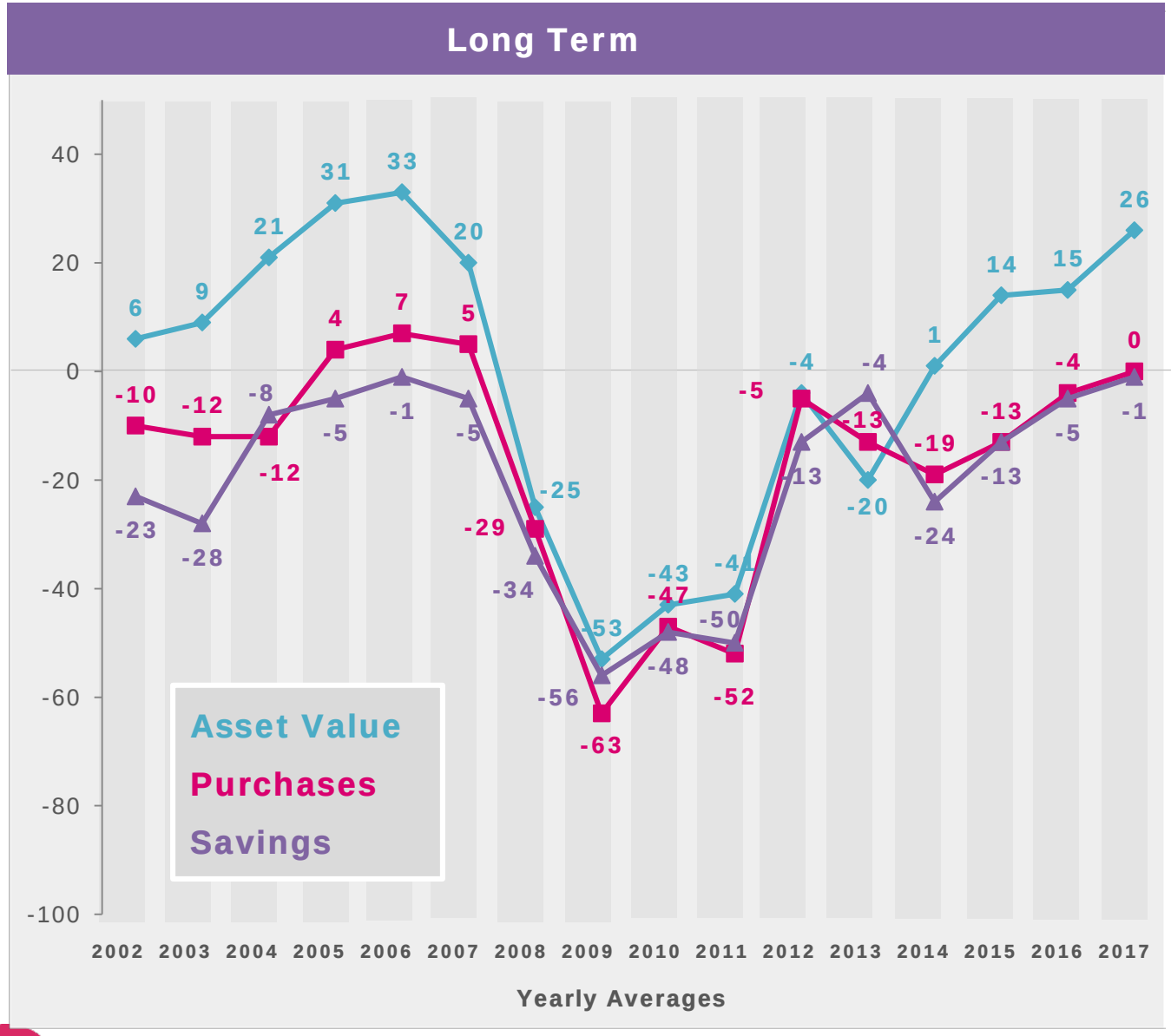
Attitudes towards future spending remains steady across the country.

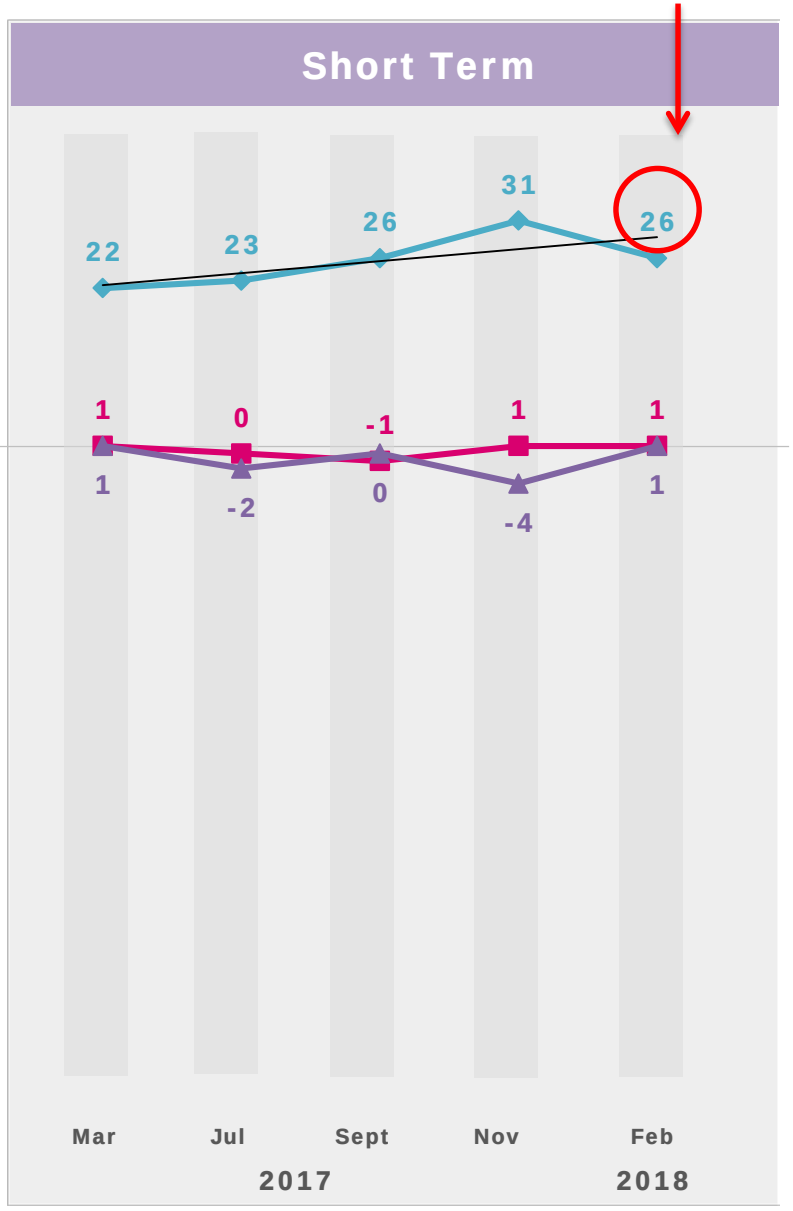
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Feb 18
Gap	+7%	+5%	-29%	-63%	-47%	-52%	-45%	-37%	-19%	-13%	-4%	=	+1%

Source: B&A Consumer Confidence

Q.7 In the year ahead, do you expect to purchase more, less or the same amount of goods and services as in the past year?

Personal finance expectations





Source: B&A Consumer Confidence

Entitlement and disappointment

- Fundamental measures of economic health look good
  - Consumer Confidence is steady
  - Retail sales are growing
  - Employment is buoyant
- Indeed, asset values are approaching the peak levels we saw in 2006.
- So we expect more, and we expect to have our share..
  - Whether it is extensive benefits in the workplace
  - Multiple foreign holidays
  - Or a new car
- And yet the promised land of independence and property nirvana remain out of reach…
  - A generation is emerging who have high expectations, but must make tough choices.

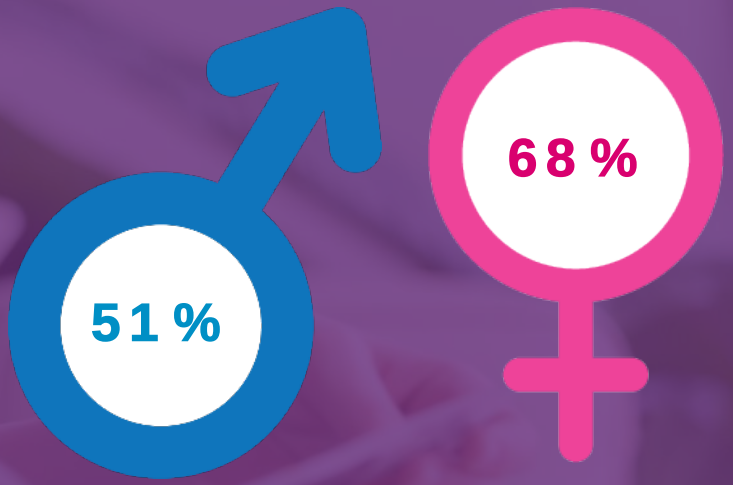
“
Eventually I’m going to have to move back in with my Mum to save for a mortgage because there’s no way you can do it living by yourself and renting.
”

Our health agenda

Health 2018

- Public display of health awareness/participation rising especially with those under 30
  - Fitbits at work
  - Diet latest
  - Sugar and Syns.
- This is not just about eating well and keeping fit, there is desire to signal a **better lifestyle**
  - At least to establish difference from unhealthy, overweight and **undiscerning.**

59%
interested in information about diet and health

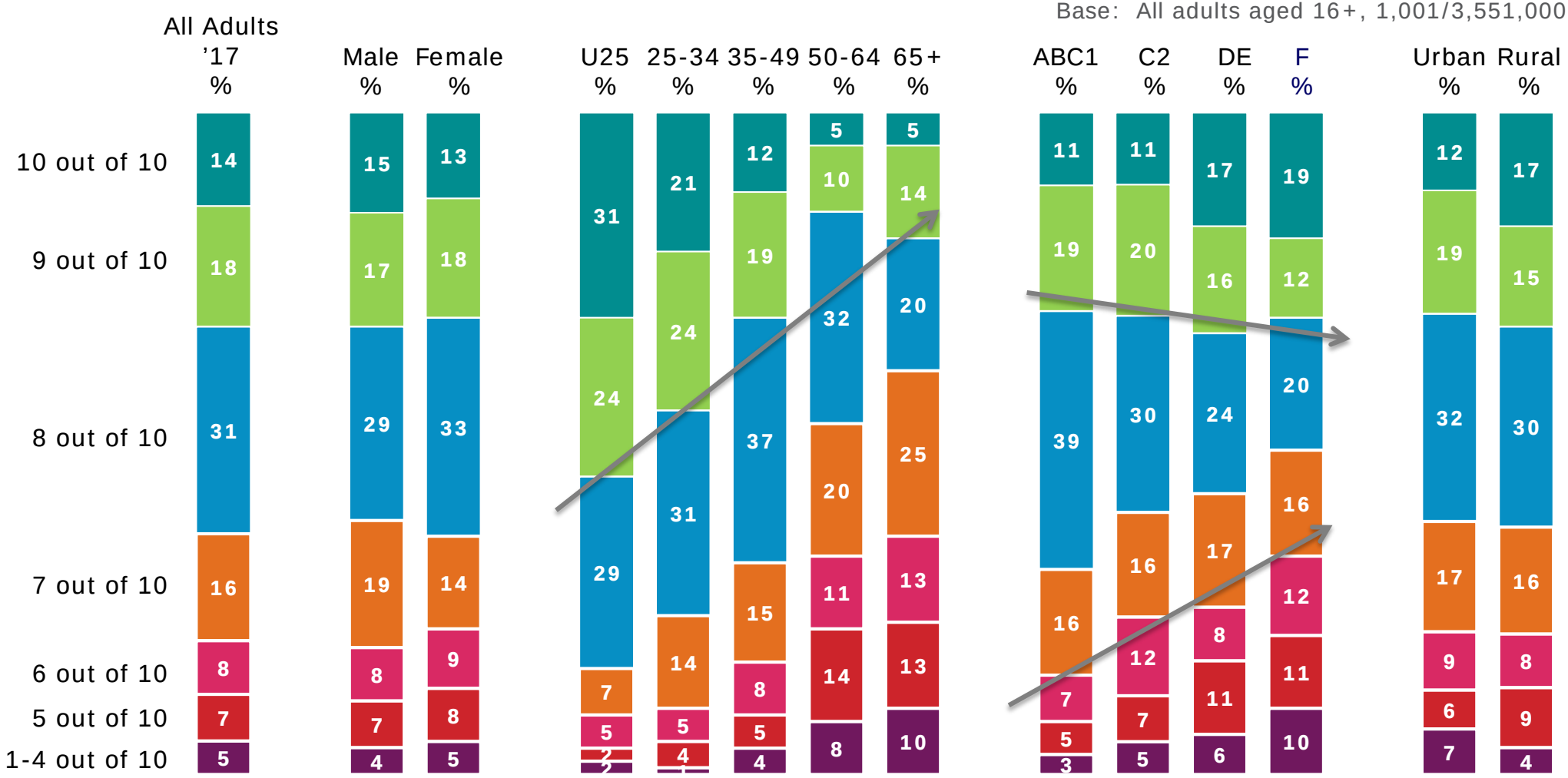


Source: B&A Nov '17, Health Survey

Personal health demographics 2017

How well we feel is directly influenced by age and by socio-economic status.

Base: All adults aged 16+, 1,001/3,551,000



Source: B&A Nov '17, Health Survey

	All Adults '17	Male	Female	U25	25-34	35-49	50-64	65+	ABC1	C2	DE	F	Urban	Rural
Average 2017	7.7	7.7	7.6	8.6	8.2	7.8	7.0	6.8	7.8	7.6	7.6	7.3	7.6	7.7
Average 2016	7.8	7.8	7.9	8.5	8.5	7.9	7.1	7.0	8.0	7.9	7.5	8.2	7.8	7.8
Average 2015	7.8	7.8	7.8	8.4	8.3	7.9	7.4	7.0	8.0	7.9	7.5	7.8	7.8	7.8
Average 2014	7.9	8.0	7.7	8.3	8.2	8.0	7.3	7.3	8.0	8.0	7.6	7.9	7.8	8.0

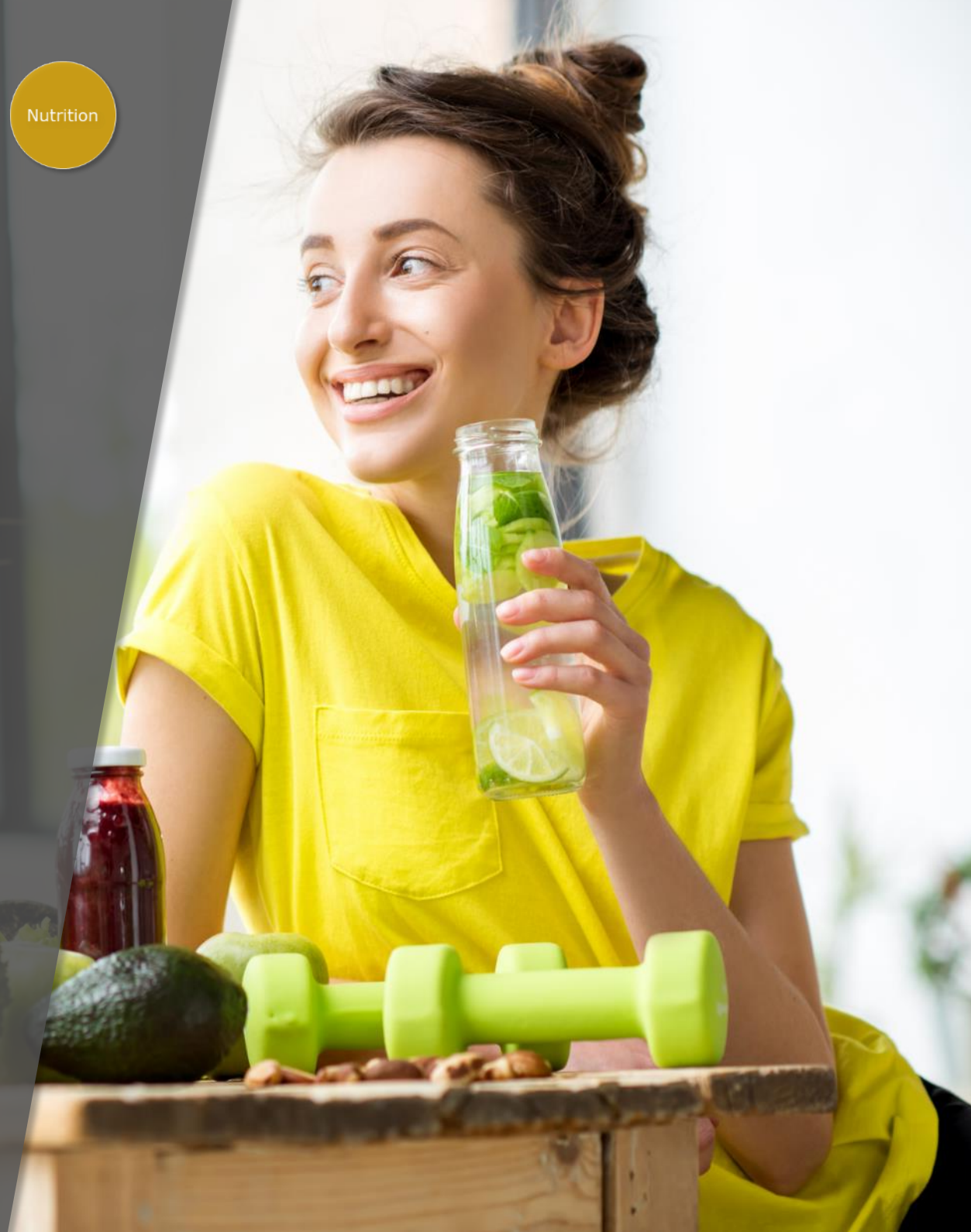
Those under the age of 35 most likely to rate their health as very good (average ratings of 8.6 for under 25s and 8.24 for 25-34s.)

Many feel strong sense of connection with need to make change in holistic way.

Nutrition

Nutrition

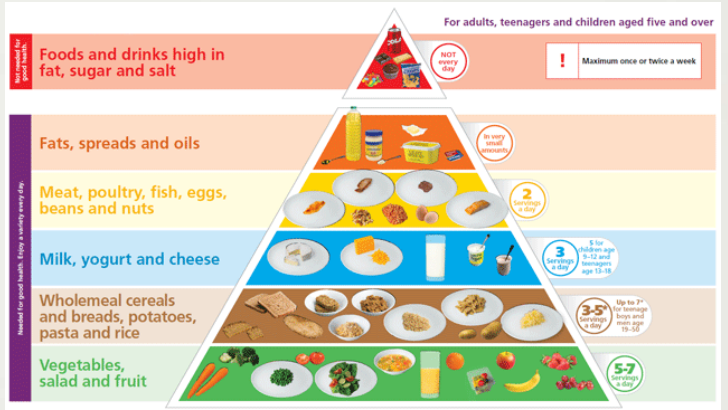
- With such high levels of interest in health and fitness, nutrition has become a **hot topic** for a much wider cross section of the public than in the past.
- But there is such a wide range of influences and informed sources **all readily accessible** that **contradictory** trends can be discerned.



Nutrition

Too many toxins

- We are faced with conflicting messages from reliable sources and bewildering options at point of sale
  - Fruit & veg is good, but doesn't fruit have lots of sugar?
  - We need dairy for calcium but is it natural to consume another animal's milk?
  - We should reduce consumption of saturated fat, but isn't low fat stuff full of sugar?
  - WHO said processed meat is bad, but isn't more protein good?



Source: Safefood

Conflicting messages

Nutrition

“

Yoghurt is crap for you.

Bacon is just as bad as smoking now.

Apparently breakfast is not important anymore.

My friends would be tagging me on food stuff all the time for quick recipes and stuff like that.

All the good stuff is bad for you.

If it’s high in sugar it’s probably bad for you.

There’s always a new fad - Paleo or do you remember Atkins?

You can come home and you are so hungry you probably make bad decisions then.

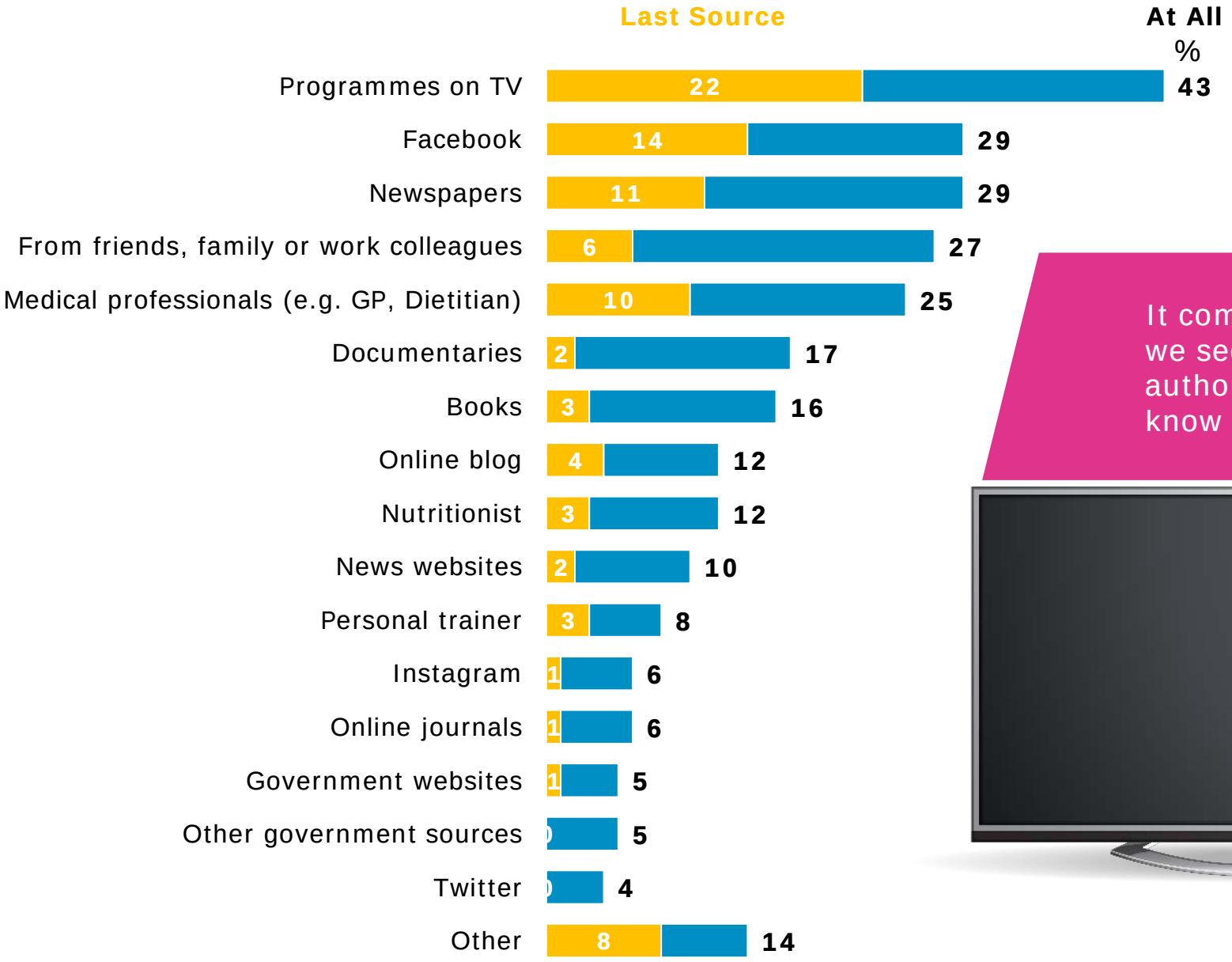
”

Nutrition

So who do we trust?

- Our news feed fills up with diet and health information **because** of our previous chats/searches so which source is valid?
- TV presents endless health and food shows: Operation Transformation, Doctor in the House, Bake Off and others, but is this reliable?
- Your GP is often a key reference point for health (and yet GP's receive next to no training on nutrition).

Sources of info on diet & health



It comes down to sources we see a lot and medical authorities we assume know best….

Base: All Adults aged 16+: 821

Q.3 Where did you come across this information last?
Q.4 Where have you come across this information at all?

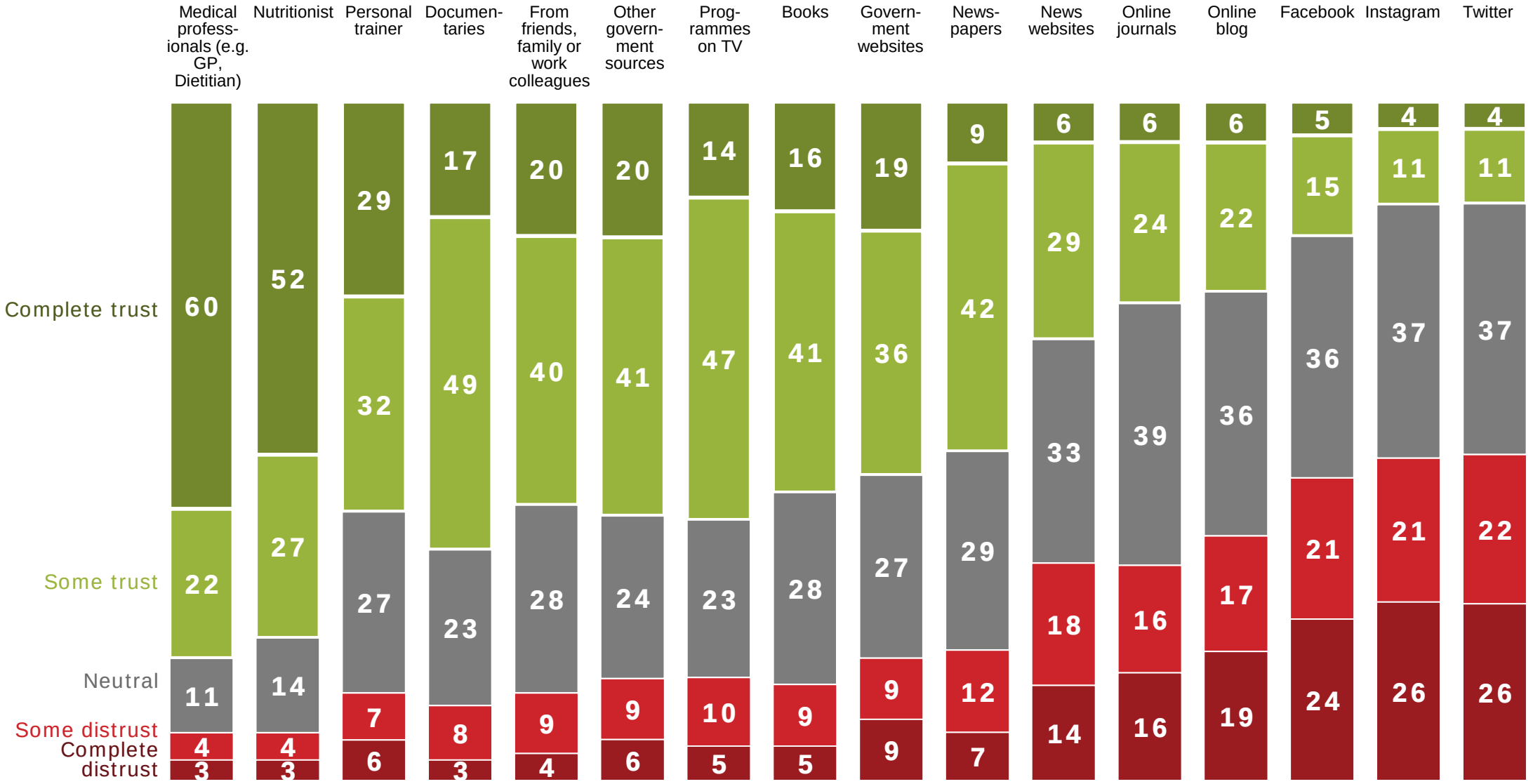
Source: B&A Nov '17, Health Survey

A question of trust

However, **TV programmes** are trusted 3 times more than **Facebook**, as a source of info on diet and health.

Source: B&A Nov '17, Health Survey

Trust of Sources



		Medical professionals (e.g. GP, Dietitian)	Nutritionist	Personal trainer	Documentaries	From friends, family or work colleagues	Other government sources	Programmes on TV	Books	Government websites	Newspapers	News websites	Online journals	Online blog	Facebook	Instagram	Twitter
- ANY Trust	%	82	79	60	66	60	61	62	57	55	51	35	30	28	20	15	15
- ANY Distrust	%	7	7	13	11	13	15	15	15	18	19	32	32	36	45	47	48

Base: All Adults aged 16+: 821

Source: B&A Nov '17, Health Survey

Q.7 Thinking now about trust, please rate how much you trust the following sources of information on diet and health on a scale of 1-5 where 1 is complete distrusts and 5 complete trust

Nutrition

New faithful

- Partly in response to the confusing array of contradictory diet information some adopt a **fervent belief system** about their diet and lifestyle.
- There can be a sense of strong advocacy whether it supports whey protein and gym attendance, organic meat and label checking or veganism and rejection of mainstream brands.
- For each ‘faith’ there are easily accessible sources of information bubbling up from around the world offering a convincing doctrine.
- In fact, each faith appears to have its own plausible science, so it becomes a question of trust and credibility rather than proof.

Key themes in food

Nutrition

Nouvelle fast food

Involvement benefit

Give up & balance

Sugar evil

Nutrition

Nouvelle fast food

- We have not lost our appetite for a quick food solution, but the focus has shifted.
- **Chopped, Wilde and Green, Avoca, Umi Falafel, Café Paradiso, Happy Pear** are now seen as mainstream options.
- More of us are flexitarian (fair weather vegetarians).

Involvement benefit

- There is a desire to connect more with our food to ensure we are in **control** of its ingredients.
- That puts pressure on us to cook from scratch, yet we are not all confident in the kitchen.
- So we may opt for more natural, authentic ‘craft’ brands that seem to be more in touch with nature.

Nutrition

Give up & balance

- More of us are just throwing up our hands in despair at confusing diet information that seems to change every few weeks.
- Rather than pursue the elusive ‘ideal diet’ we resolve to aim for a little bit of everything/nothing in excess.

Sugar evil

- One thing we all agree on is that sugar is toxic (and it’s in everything!).
- Yet, Halloween, Christmas and Easter are about chocolate for the kids right?
- So sugar is evil, unless it’s an expression of our culture.

Nutrition

“

Sugar is related to obesity and diabetes and I think hyper activity in kids!

My Mom made most of the meals with real actual food. There was very little processed food growing up!

When it came out that rashers and sausages are part of it I just wanted to crawl under a rock!

I didn’t want her to have chocolate but now she is obsessed with it!

You are bombarded with what is right and what is wrong!

Every packaged product has sugar in it – I am very much aware of it.

People are going out to the gym before work.

”

Established food tribes

Foodies

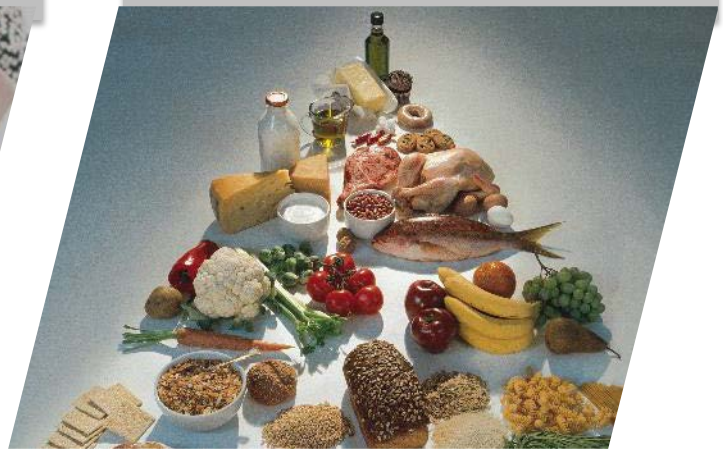
- Wish to signal sophistication and alertness to cultural capital of food.
- Seek authenticity, and exotic novelty.
- Seek out new information.
- Embrace sensory overload and indulgence.
- Upmarket reality TV (Bake Off et al).

Ingredient checkers

- Seek out **latest** thinking on food.
- Suspicious of commercial drivers in food industry.
- Health food store key.
- Clean diet/Paleo.
- Online/Netflix exposé on food industry.

Balancers

- Pragmatic food decisions about what works and is generally healthy.
- Quick to point to need for ‘cheat days’.
- Often express exasperation at volume of contradictory information on nutrition.
- Recall of food pyramid
- Mainstream media.



Emerging food tribes

Protein boys

- Pride in body beautiful.
- Whey protein, etc.
- Monitor diet closely.

New vegans

- Reject modern consumerism.
- Suspect big brands.
- Lifestyle and environment not just no meat.

Good sweat

- Less trust in any processing (yoghurt, pasta sauce).
- Everything from scratch must be better!

Sensitive souls

- Food intolerance has become a default suspect when bloated.
- Resulting in experimenting with exclusions (gluten, dairy, meat).

Yet our cultural roots diverge from health agenda…..

Nutrition

The binge

- Loss of self through immersion.
- Abandon responsibility.
- Embrace the moment.
- Irreverent indulgence.
- Think stocking up on booze for Storm Ophelia! White bread for Emma/Beast from the East!

The feast

- Entitled excess.
- Ritualised display.
- Family togetherness, validates indulgence.
- A sentimental connection with our past?

Expert opinion

What should we eat?

- It seems that the right advice is often the most boring and difficult to stick to
  - And we are often in search of a ‘magic pill’ or a ‘new faith’ rather than prepared to adopt simple changes.
  - Experienced senior dietician, Orla Haughey, increasingly sees clients with problems arising from poor advice, self imposed exclusion diets and deeply embedded cycles of behaviour that repeat poor nutrition choices.
  - Her advice is ultimately to find solutions that will begin the process of change towards a better diet in achievable steps with the ultimate goal of eating:
    - More fruit and veg.
    - (Delivering more fibre)
    - And achieving a sustainable ‘balance’ with a mixture of elements.
  - She adds that a **community** basis for adherence is often the best motivator – helping people stick with the plan.

Orla Haughey – (Senior Dietician)

“

I’ve seen the impact of health that poorly tailored advice can have on clients. They will take on any advice out of desperation. Anything that sounds unusual or different.

I think we should cut back on our meat and meat production needs to be overhauled.

A WhatsApp group is one of the best motivators. People are encouraged to share daily. It’s visible and immediate. There is more of a collective feel.

Without a good intake of fruit and veg your phyto-chemicals and Omega 3 your mental health can’t be as healthy as it could be.

People are grasping at health and there’s a huge interest in health and fitness but the drink culture is hard to shift. They’re adopting a diet just four days a week and feeling they must ‘join in’ at the weekends.

On a high protein no carb diet they will see an immediate weight loss but then there is often a yo yo rebound and they can change their gut flora and end up with IBS symptoms.

On Facebook there is so much from unaccredited sources. People don’t realise what they are being exposed to.

”

The view from David Flynn

- Ireland seems to be shifting towards greater interest in healthy lifestyles and a broader acceptance of food choices like veganism.
- But at the same time Ireland has a huge problem with obesity, heart disease and cancer often linked to lifestyle factors
  - So we are not yet walking the walk.
- Information sources are readily available to support almost any approach to food, and even apparently reputable sources can be influenced by vested interests.
- At the core of the Happy Pear's philosophy is the desire to inspire as many as possible to eat more fruit and veg. to be inclusive rather than definitive and start people on a journey to better food.
- With a dynamic approach to trying new things the Flynn brothers have managed to evolve their business while maintaining a focus on healthy (and ethical) nutrition.

David Flynn –(Happy Pear)

David Flynn
Of the Happy Pear
Inspirational vegan, best selling author and entrepreneur

"

It's far more acceptable to be vegan or plant based nowadays, whereas amongst my parents' age group saying you were vegan was like some weird religion!

With documentaries on Netflix and things like that people are eating more veg. they are more conscious.

People feel guilty if they are told they are doing something wrong. They want to be told bacon sandwiches are healthy and dark chocolate and red wine is good for you!

In Ireland the whole agricultural industry grows animals and takes their milk, so there is going to be huge interest in keeping people eating animals and drinking milk.

It's like slowly not trying to force anything on anyone, but just being here and creating a really open atmosphere where people feel part of it. It adds a bit of colour rather than just something commercial.

50% of the Irish population will die from heart disease or cancer and these are largely lifestyle related diseases.

There are people getting more obese and getting sicker and then people looking at their health, how I deal with stress what do I eat? So, I think it's a split in Irish society.

Good bacteria feed on fibre. Where do you get fibre from? Fruit and veg! and it's 90% of our immune system is in your gut. So it's like feed the bacteria! They don't like donuts!?

You can find validation from whatever you want now. So you have to think if it makes basic sense and where's the information coming from. Ask who is funding the studies?

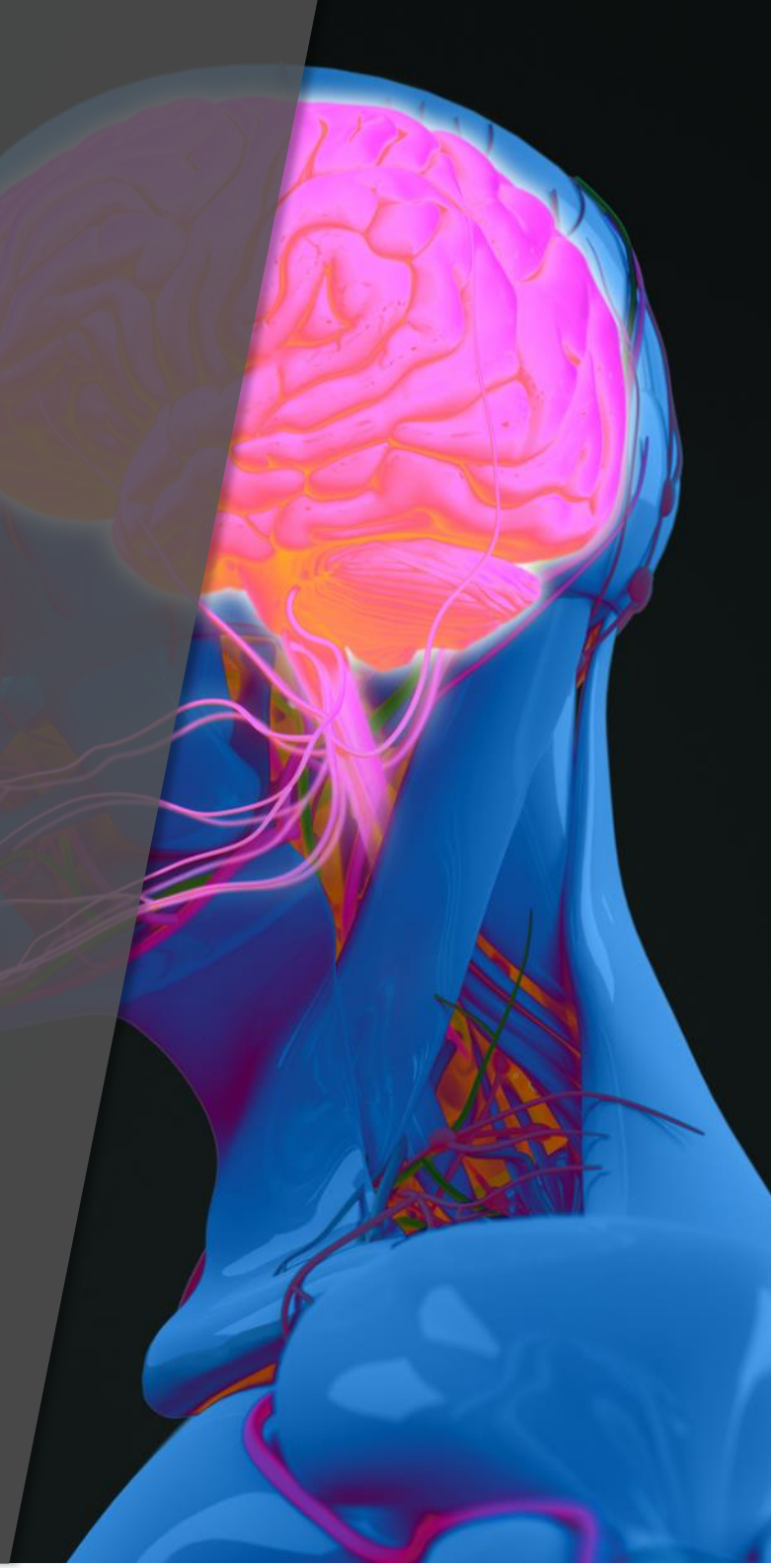
We have a bunch of products in SuperValu and there is a big demand for them. Retailers see that it's a growth sector for them.

Talking about food is like talking about religion. People get so emotionally entwined with it.

"

What is the latest thinking?

- In fact we have some of the most advanced research in Ireland at the APC Microbiome Institute in Cork under Professor John Cryan.
- This is where new research on the importance of our gut flora is taking place.
- Fundamentally, our health, response to stress, propensity to food allergies, incidence of asthma and even our sense of well being are closely tied to what goes on deep in our gut.
- It seems that health is not just about getting the right mix of vitamins, it is about feeding the good bacteria in our gut.
- John Cryan has also established a close link between these bacteria in our gut and our mental health in his published work on the gut-brain axis
  - Good bacteria ‘reward us’ for eating what they like by releasing serotonin.
  - And what do they like? More fibre!



Professor John Cryan –
Department of Anatomy and Neuroscience UCC

Professor John Cryan
APC Microbiome
Institute of Ireland Cork

“

What our research has being showing is the composition of the bacteria in your gut is one of the key areas we have for managing how we deal with stress.

In a study of 180 elderly people we were able to show that the diversity of microbiome in their gut was connected with their fragility, cognitive decline and their immune function.

With genetics you can’t change them but with your microbiome you can change and tailor it through your diet.

In the scientific world hard core disciplines are based around molecular mechanisms, disease and immunology. All hard mechanisms. Nutrition comes across a bit softer. It is there in public health but it’s not seen as hard science.

The problem with nutrition interventions is that compliance levels are really bad. Awareness is the first step, the next step is adopting and the third is maintaining. The maintenance stage is really where the effort needs to be put into things.

”

Fitness

- A gap is emerging between those seen as fit and unfit. As a result there is more pressure to signal participation:

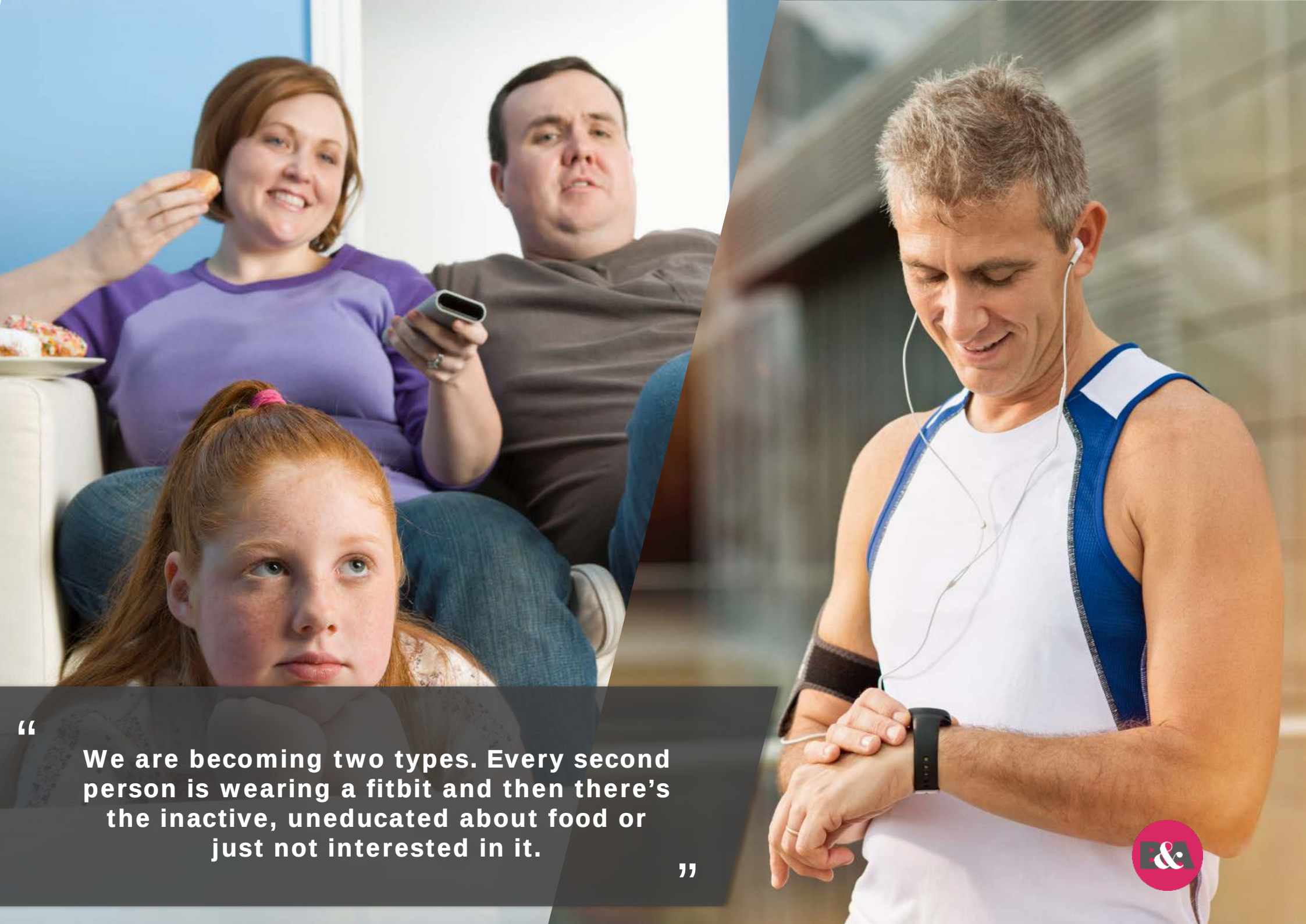
  - Fitbit - Weight training
  - Workplace initiatives
  - Gym - Sport

  - Particularly amongst Millennials.

- Non-participants by default are seen as part of an amorphous **unhealthy / unfit** tribe closely aligned with national health statistics re obesity and heart health.

- This is also linked with lifestyle. Is my lifestyle :

  - Good or bad?



“We are becoming two types. Every second person is wearing a fitbit and then there’s the inactive, uneducated about food or just not interested in it.”

Fitness

Both intrinsic and extrinsic benefits

- Improved metabolism and heart health.
- Recognition that fitness is linked to mental health
  - Takes mind off stress
  - Improves concentration and creativity
  - Creates break from routines.
- Builds confidence and bolsters identity.
- Fitness is also attached to **display** of health.
- In fact, much of casual health dialogue online is heavily influenced by image:
  - Before and after dieting pics
  - Muscle tone.

Fitness

Displaying fitness

- Look at the level of social media sharing of activities.
- Or the way sports outfits are now ubiquitous casual wear.
- Or how technology measures, tracks and rewards us
  - Reminding us to stand up
  - Or tracking our sleep.

More people are engaged in sports and fitness activities partly because it is not just about health it has social currency.

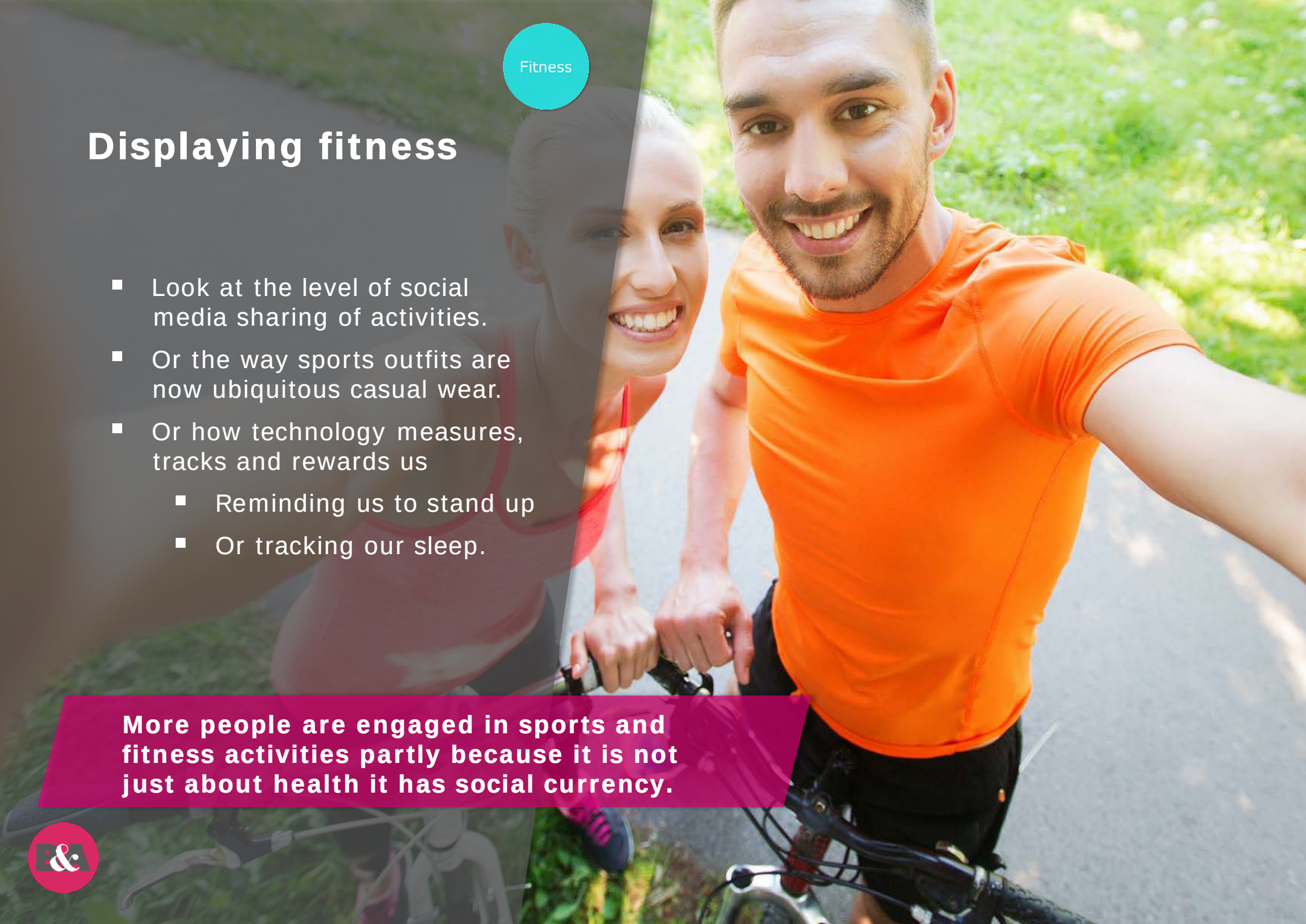
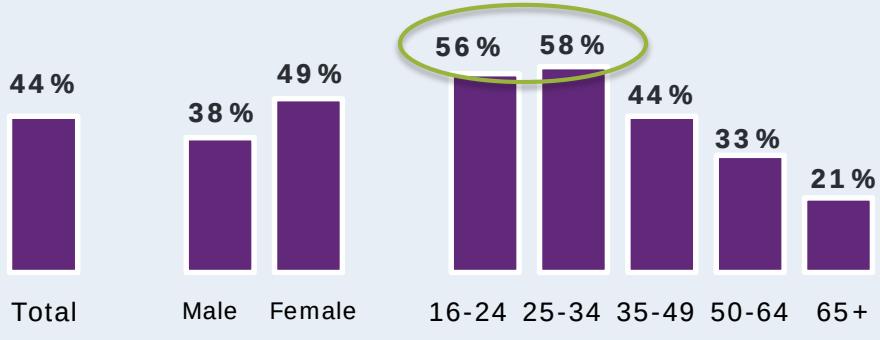
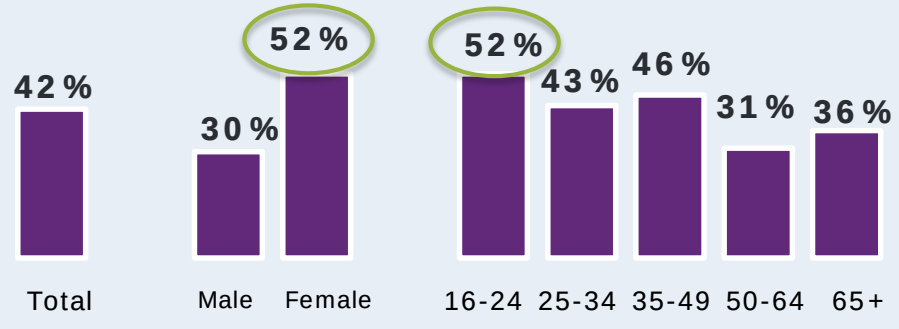


Image & visualisation is crucial

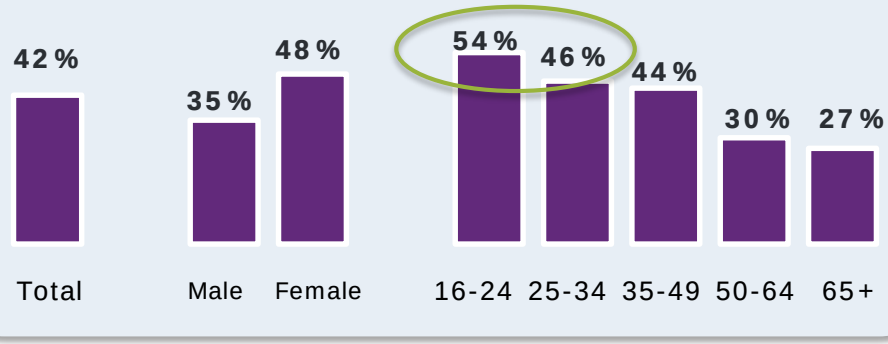
Most social media posts about diet, health and nutrition are inspiring



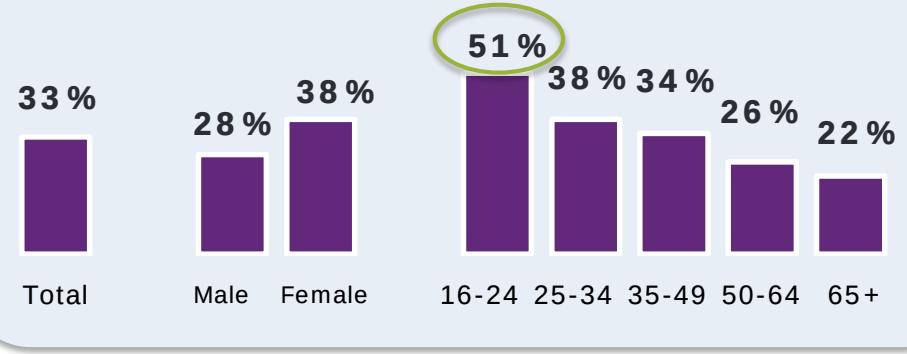
I'm always drawn to before and after pictures



I feel really motivated to work hard at looking my best when I see pictures of people in peak physical condition



I feel a lot of pressure to look my best these days



Base: All Adults aged 16+: 821

Source: B&A Nov '17, Health Survey

Lifestyle

Catching your breath.....

- The pace of life is felt to be quicker than ever before:
  - Partly driven by the constant connectedness of a smartphone infused world.
- Millennials, and others, express conflicted feelings about smartphones.
  - A fascination and a dependency.
  - A need to keep in touch, to be part of what's going on.
  - Ultimately an addiction.
- As a result, there is a strong desire to **'rebalance'** or 'detox'.

Lifestyle

Work life balance

- We feel that work is not just reaching into more of life but also all boundaries are blurring
  - Social media at work
  - Work emails at home
  - Browsing while commuting
  - Fitness monitoring all the time..
- The concept of the ‘work life merge’ (coined by Facebook) feels less desirable in this respect with little time to ‘catch our breath’

The desire to ‘step off’

Lifestyle

Slow down or return to something simpler

Career change

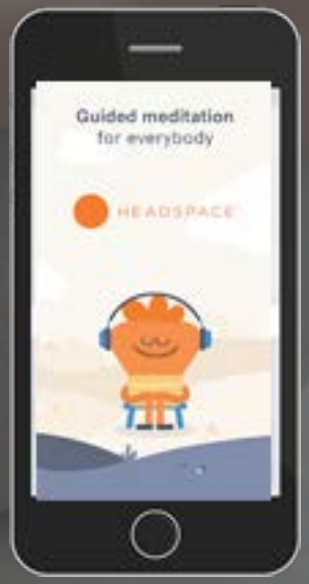
Mindfulness

Paleo diet

Lifestyle

What are we thinking...?

- Meditation has been around for 2,500 years. Resurgent in the 60s it has now found expression in the form of **mindfulness**.
- In our need to **step off** many are turning to yoga and mindfulness classes
- And there is scientific support as a solution to **mental health problems**:
  - Stress, anxiety, depression are now as likely to be treated with Mindfulness Based Cognitive Therapy as drugs.
- And then we have the ultimate expression of our zeitgeist in the form of apps
  - Just squeeze in a minute of meditation on your iwatch!



Expert opinion

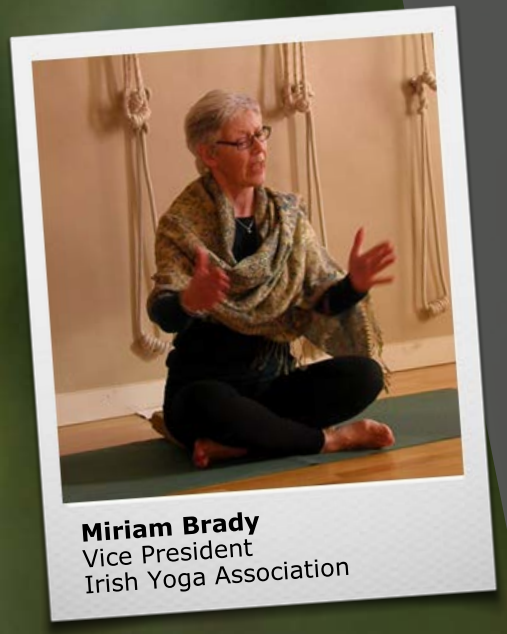
Making space for yourself –
Why yoga is relevant

- **Mindfulness** is not just a buzz word, it is the meeting point for ancient Eastern philosophy and modern Western science.
- Ironically, the concept of mindfulness at its root is about being entirely present. Recognising the distracting influence of stray thoughts, emotions and attachments.
- **Yoga practice** links the body and mind in a direct way. It is a calming process of slowing down and not seeking short term solutions
  - So it does not always easily fit in with a compartmentalised and time pressed lifestyle.
- But, in a way this is entirely the point. The very pace of modern life, over stimulated by smartphones has created a yearning for a **‘time out’** and a greater appreciation of yoga.

Miriam Brady – Vice President Irish Yoga Association

“

You can sometimes feel the way life is that there is an underlying level of anxiety with smartphones, or whatever, we are very busy and there is a lot of information coming in so it is good to have tools so you can wake up in the morning and say I’m going to breathe now!



The younger generation seem to be more stressed than we were, even though they have access to everything that can help with stress.

There is more recognition that natural healing is relevant now.

Mindfulness is a Buddhist term but nowadays because the effects have been wonderful it is coming up everywhere – it’s being put into schools. It works well with anxiety.

It is nearly the combination of the movement. The breath and the mind that drew me to yoga. I remember noticing how my concentration was improving when I first started.

In the training you do a lot of self development and in the classes you re constantly sharing with them ways of looking at themselves. It can give them confidence to do other things.

The IYA is the only yoga teacher training course in Ireland that is recognised by the European Union of Yoga because our course is over 4 years.

Ireland is really at a teenage stage we haven’t really grown up. We got our independence, only a hundred years ago but the big thing we don’t accept is responsibility I feel.

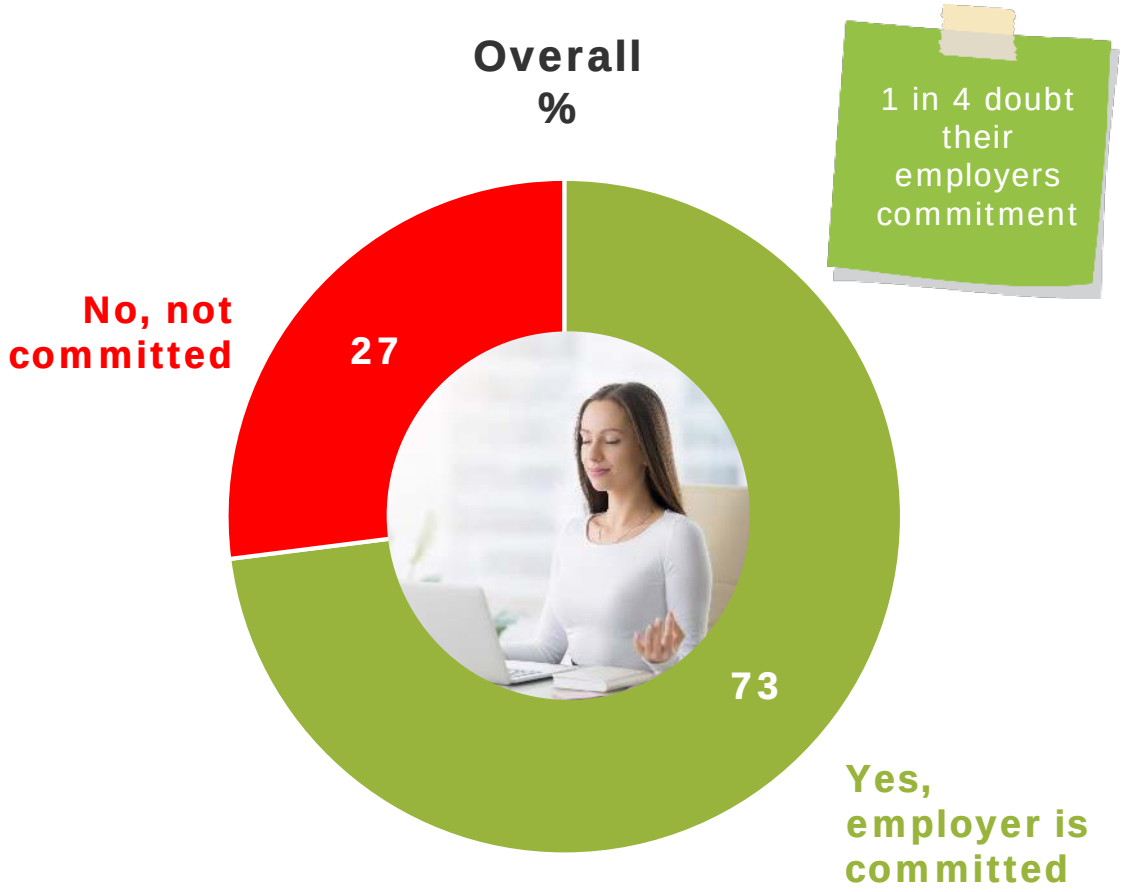
”

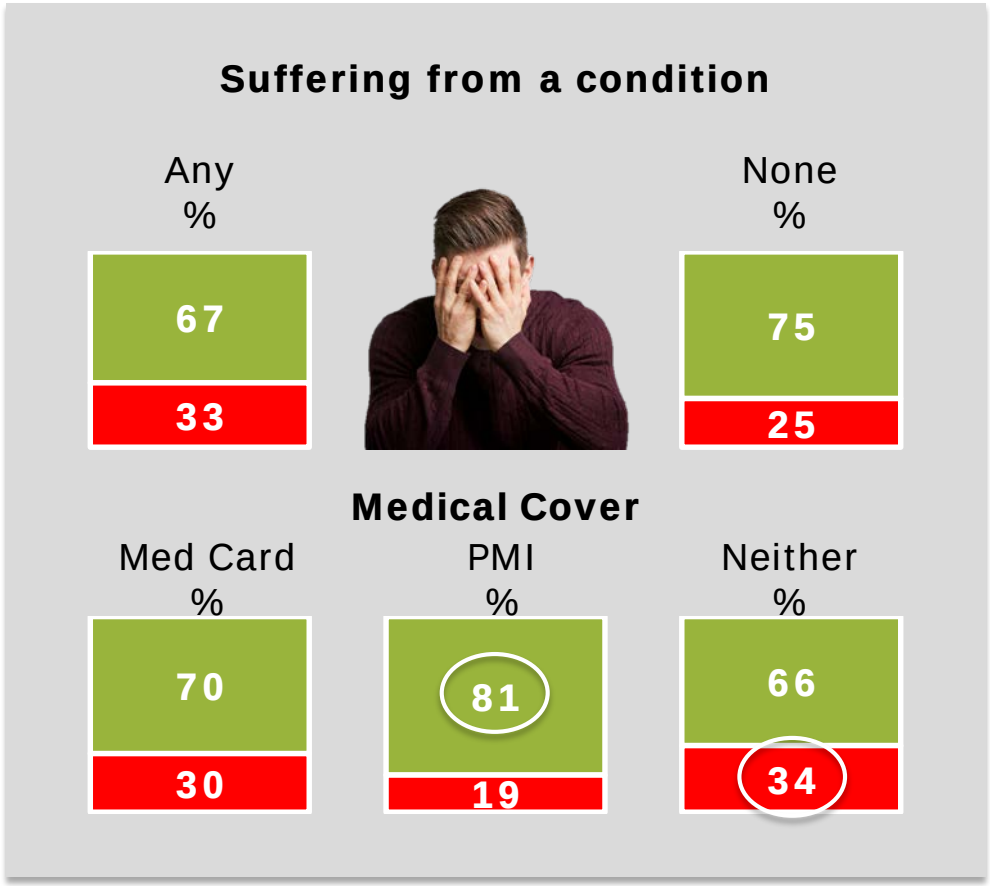
Lifestyle

Workplace and health

- As health and fitness has become persuasive in Irish culture it is also entering the workplace.
- Arguably led by the American tech giants (Google, LinkedIn, and Facebook) a variety of wellness and EAP initiatives are now being introduced in lots of workplaces.
- But, while many feel their employer is committed to employee wellbeing, few feel comfortable talking about their health with their boss.
- In addition there can be implicit pressure to participate in the workplace schemes reflecting the same ‘in group’ or ‘out group’ tribes we see in the wider community.
    - Are some wellness policies overstepping the mark?

Employers commitment to workplace health





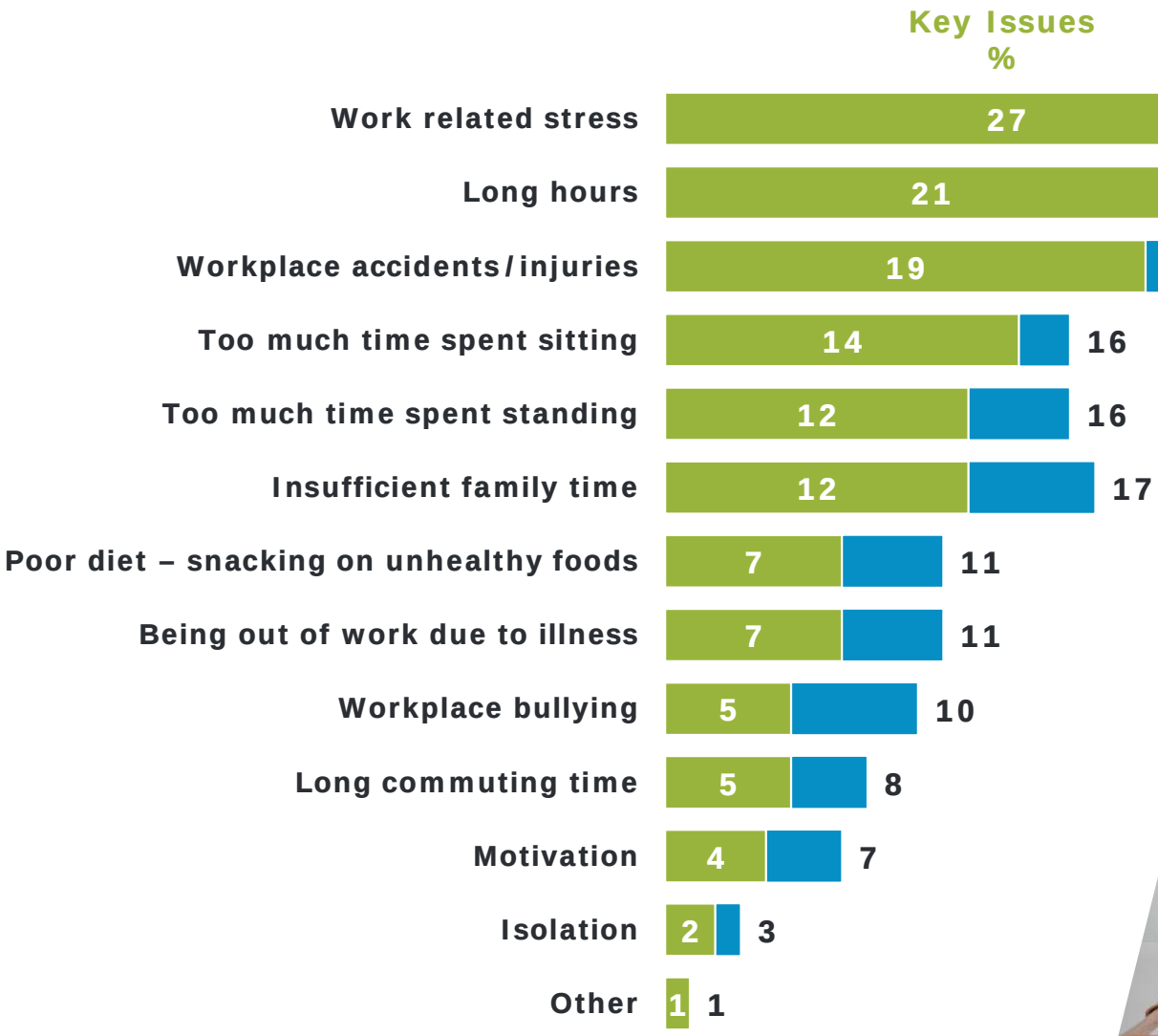
Base: Any working 540/1,820,000

Majority of working adults feel their employer is committed to workplace health and wellness (73%). However those in poorer health less likely to feel this way. Those with PMI most likely to view employers as committed to wellness while those with no cover are least likely.

Q.8 Is your employer committed to workplace health and wellbeing of employees?

Source: B&A Pfizer Health Index 2017

Health concerns at work



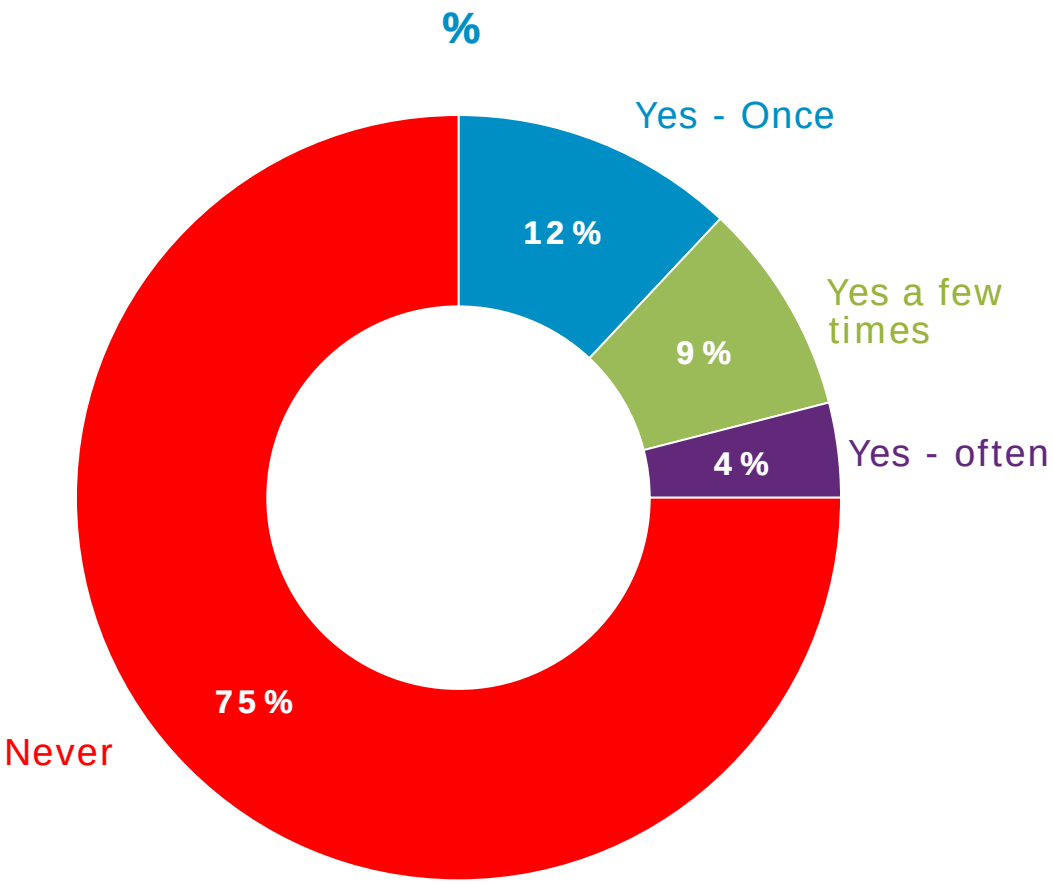
Stress and long hours the main issues.

Q.11 Which of the following are health-related concerns for you yourself as a worker?
Q.11a And which 3 of these are your main health concerns as an employee?

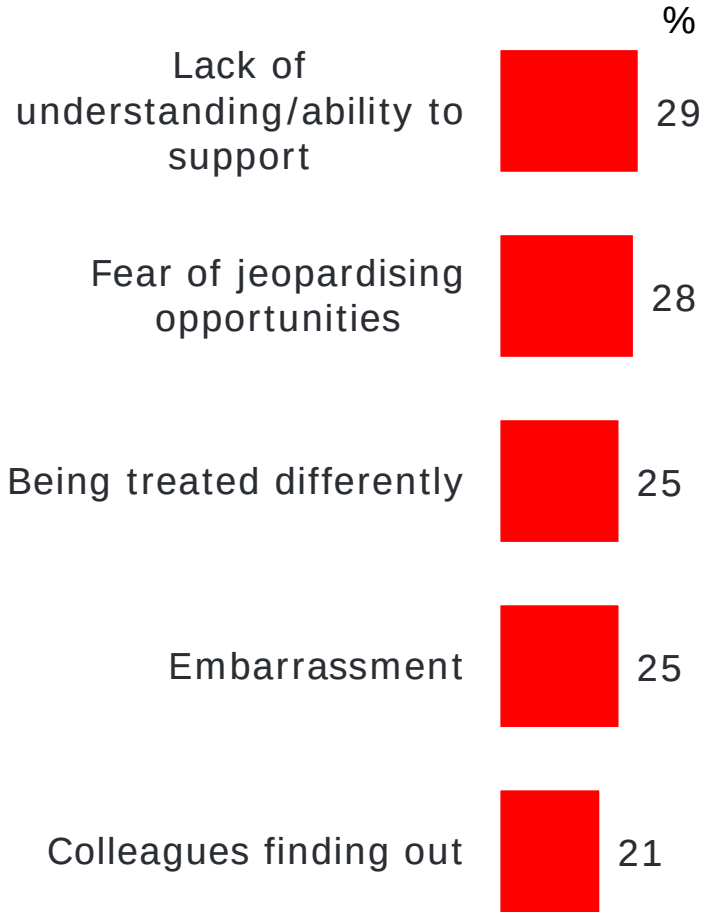
Source: B&A Pfizer Health Index 2017

Discussing health with employer

A scattergun of reasons not to!



Why not?



Base: Any working 540/1,820,000

Only 1 in 4 have ever discussed a health and wellbeing issue.

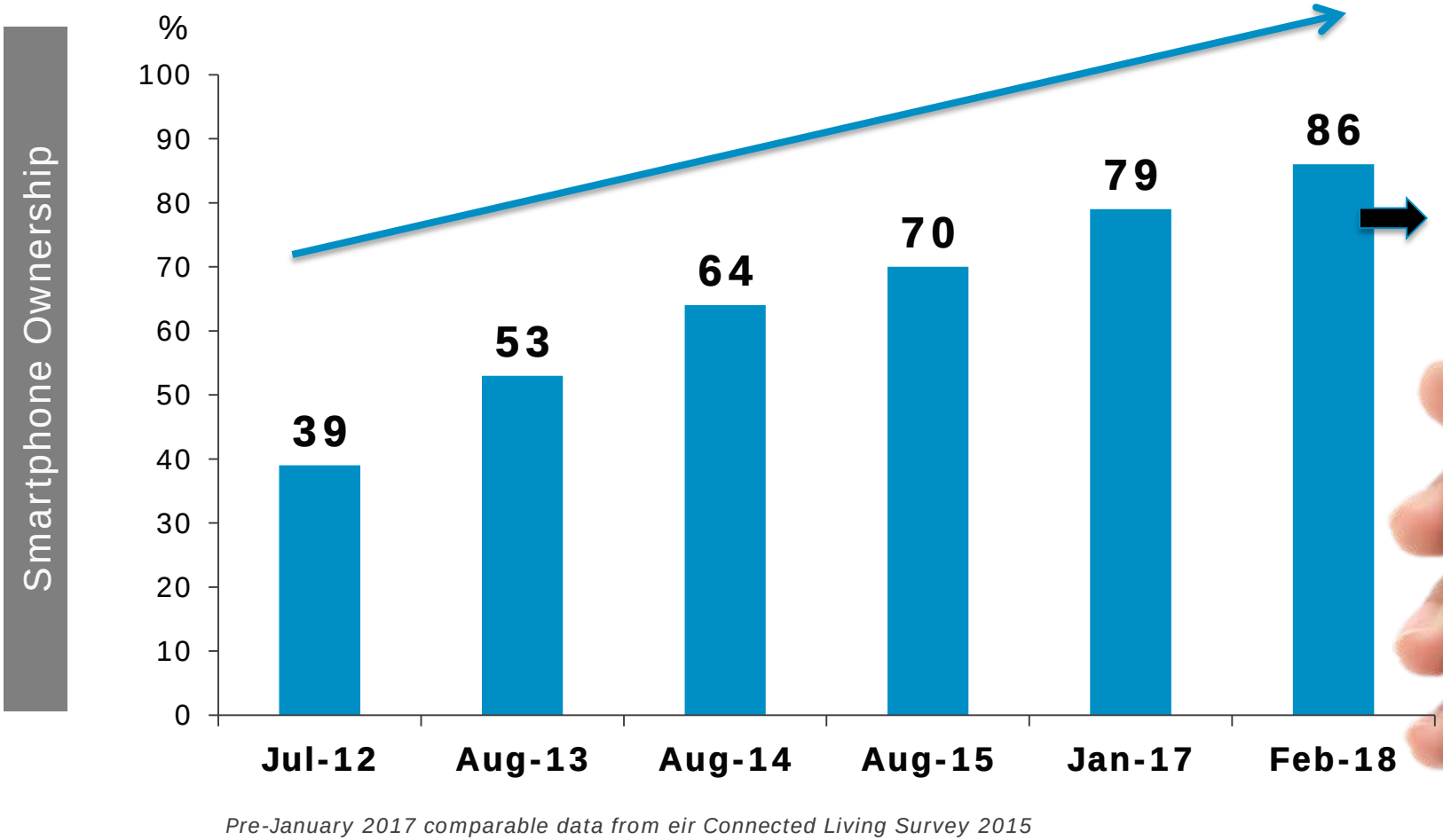
Q.9a Have you ever discussed a health issue with an employer?
Q.10 Which of the following would impede you from discussing a health-related issue with your employer?

Source: B&A Pfizer Health Index 2017

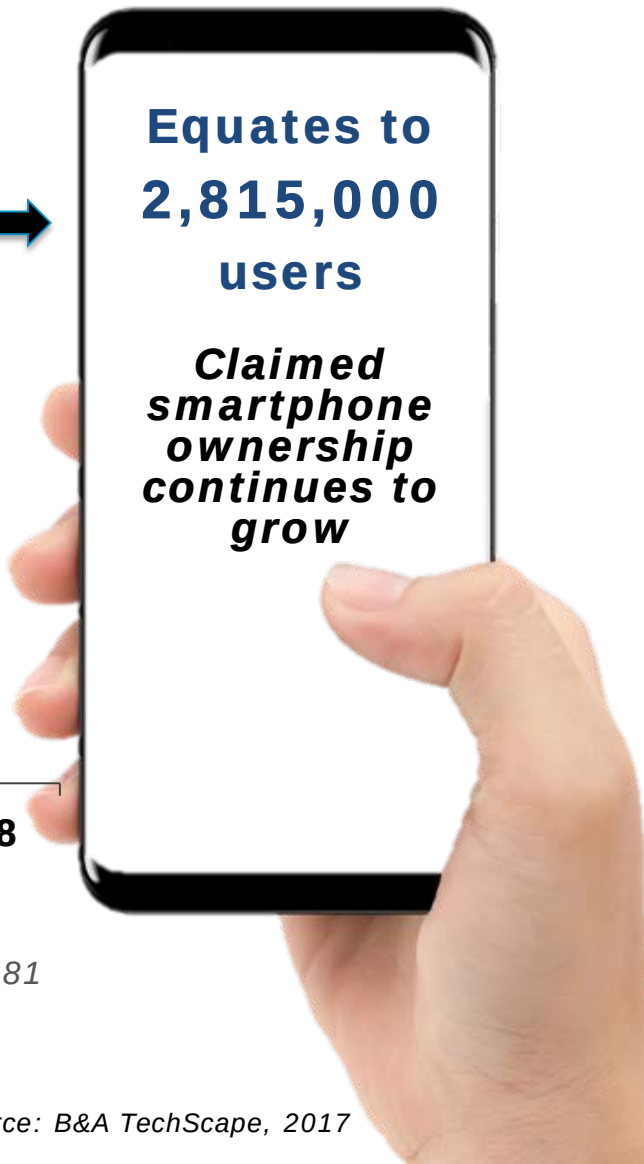
“
My employer considers fitness to be a huge thing. If someone was interviewing for a job and they were not into fitness I think they would nearly choose somebody else.
”

Technology

9 in 10 now have a smart phone



Pre-January 2017 comparable data from eir Connected Living Survey 2015



Base: All with mobile - 881

Q. Which of the following devices do you currently use?

Source: B&A TechScape, 2017

80%

of the population now access the internet once a day or more often (almost all under 35s are now online at least once a day)

Source: B&A TechScape, 2017

What we are doing online

- 57% Purchase goods or services online
- 47% Share posts, videos, photos etc. online
- 42% Search for free Wi-Fi when in cafés, bars, or other outlets/places
- 40% Post content online
- 38% **Research products on your mobile phone when in a store**
- 33% **Connect your tablet, laptop or mobile phone to your TV to play programmes, videos or music.**
- 33% Follow brands on social media
- 30% **Check social media or emails when having difficulty sleeping**
- 26% Check in your location when on social media
- 24% **Check work emails when on holidays**
- 14% **Turned on heating or other household devices remotely via an app**

Base: all Adults 16+ - 1,000

The under 50s, ABC1s and Dubliners are the most active online.

Q. Which, if any of the following do you do nowadays?

Source: B&A TechScape, 2017

Feverishly connected

- In any social gathering there can be a random laugh or gasp as someone reacts to their first love -their smartphone.
- Even if we remain silent, like Tourettes sufferers we constantly feel the urge to twitch, to flick the feed and check our status.
- Somehow, in our attachment to the world through our devices we have become habituated (or is it ‘encoded’?) to behaviour that seems odd when you step back a little.
- And we are seeing more evidence of people stepping back and questioning, particularly amongst younger cohorts.

A dysfunctional relationship

LOVE

- Personalised and intimate.
- My moments, my memories, my friends.
- Augments and guides every moment

Deeper relationship than any other technology

HATE

- Urgent and immediate
  - Need to keep in touch.
- Dependency
  - Separation anxiety?
- Administers, stimulates…determines?

Clear sign of growing concern and antipathy especially amongst under 30s

“It’s an addiction, I fully despise the thing. If I could just put it in the bin, but it’s so bad that when you put it away, you turn it off then you have to take it out again.”

Impact on children?

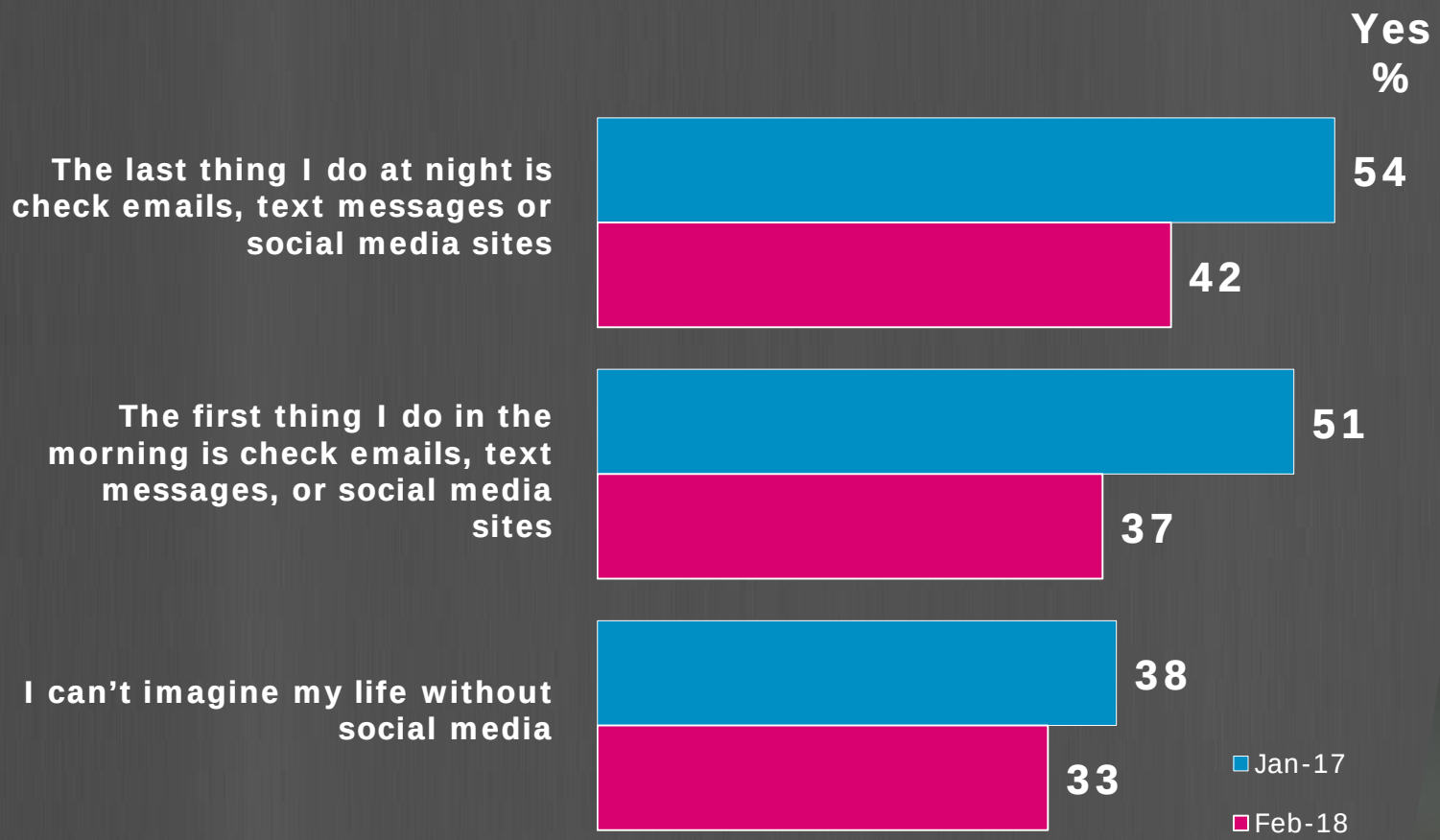
- Is early exposure to immersive technology impacting on our children?
- Primary school teachers report kids are less able to make conversation or work in small groups to problem solve.

> **“ Kids aren’t articulate as they were when I started teaching 12 years ago. ”**

- And kids themselves express dismay at competing with a smartphone for their parent’s attention

> **“ The kids are like, look at this.. are you watching? Put it down and look here! ”**

Online fatigue emerging?



Base: All use social media sites - 734

Decline in those checking social media last thing at night and first thing in the morning.

Q. Here are some other things people have said about social media. Do you agree with these statements?

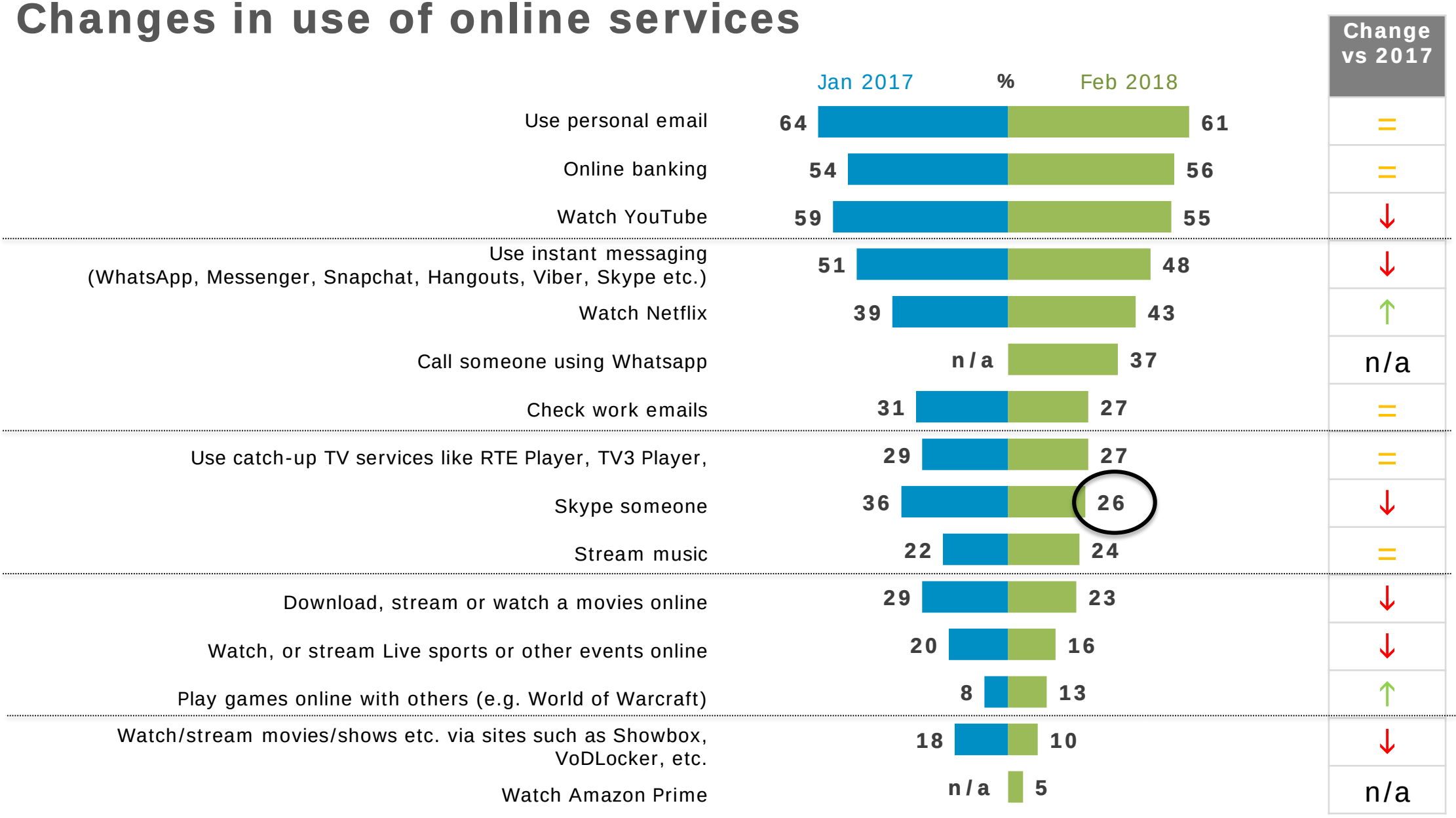
Source: B&A TechScape, 2017

47 %

of us worry about data privacy online

Source: B&A TechScape, 2017

Changes in use of online services



Base: All adults 16+ - 1,000

Increase in watching Netflix and playing games online. Less illegal streaming due to convenience of paid streaming services and catch-up TV. Skype usage has declined most dramatically – could be due to popularity of WhatsApp.

Q. Which of these do you do nowadays anywhere?

Source: B&A TechScape, 2017

The myth of ideal entertainment

- With the growth of Smart TVs and the abundance of streaming choices there is a sense of easy access to almost any content
  - And an impatience if it is not readily available.
- This has encouraged the viewing cocoon of ‘our show’
  - Pre-recorded or box set.
- At the same time viewing on mobile devices has exaggerated the **atomisation** of viewing in some ways:
  - Kids on tablets viewing Netflix
  - While Dad watches the match on the big TV.

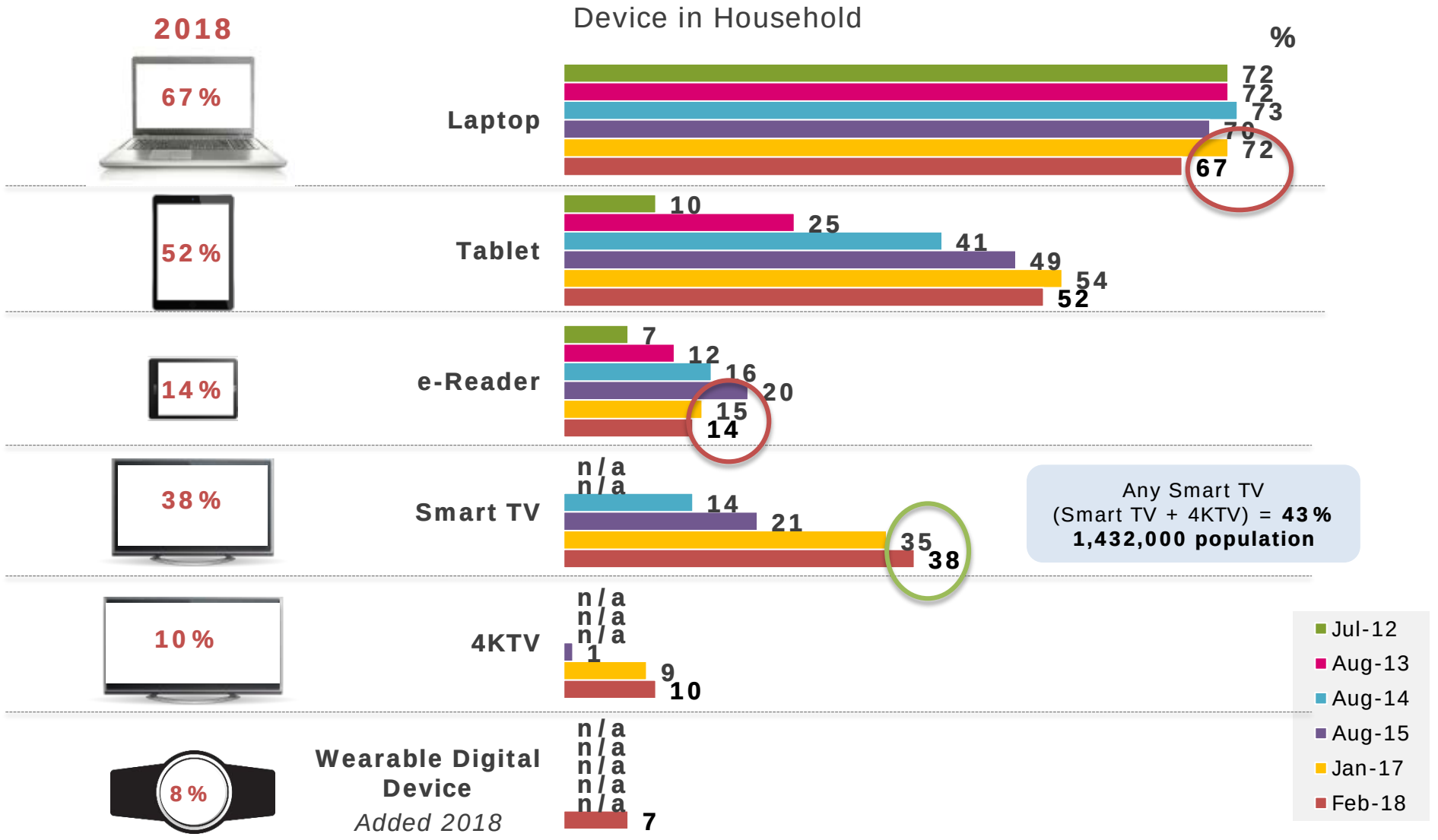
There can be a sense that there is always something better to watch….. And little experience of ‘shared’ community viewing

80%

of under 50s have watched any online video content in the past 7 days

Source: B&A TechScape, 2017

Smart TV growth continues to increase



Pre-January 2017 comparable data from eir Connected Living Survey 2015

Base: All adults aged 16+ - 1,000

Gradual slippage of e-readers evident, laptops also showing signs of decline, while Smart TVs are increasing.

Q. Which of the following devices do you currently use?

Source: B&A TechScape, 2017

It is about a sense of control

- Internet enabled home entertainment is shifting the paradigm
  - We expect to view what we want when we want it.
- We are getting used to the idea of a **curated** choice
  - Netflix recommends
  - Amazon rates.
- But, like social media we are increasingly exposed to more of what got us viewing the last time.

Is this another ‘echo chamber’?
In this case of home entertainment?

“I don’t want to watch it with other people in the room because *a.* they might not like it or *b.* it might be awkward. So I’ll just wait and keep it for myself.”

Identity

Irishness in 2018

Lifestyle

‘Other’ is better

- We have pride in our modern democracy but we still display **deference** to other cultures in entertainment and food choices:
  - True celebrity comes from Hollywood
  - Food inspiration is from the streets of Bangkok
  - Consumer trends appear in Brooklyn or Tokyo first
- This is not just an appetite for something new, there is fundamentally an appreciation of ‘other’.
- At the micro level we also want to display our discernment through choice of something that is not mainstream. It is not enough be Irish – we need authentically **local**
  - Think Wicklow Wolf or Happy Pear hummus.

Main themes

Entitlement & disappointment	High expectations are colliding with the need to compromise.
Other is better	We are proud to be Irish but we prefer something authentically **different**
Too many toxins?	The bewildering array of food information can leave us reeling
Health tribes	The dark underbelly of our fascination with health is social pressure to belong
Step off	In the frenetic pace of modern life many want a place of calmness
New faithful?	Avid diet followers exhibit signs of religious fervour
Feverously connected	Many express concern about technology addiction and we see early signs of change

Key take outs

- We take pride in our identity on the world stage, but we remain infatuated with the glamour of international culture and quirky ‘craft’ brands.
- As the economy stabilises we have high expectations, but we are having to make tough choices – not least about where to live!
- Smartphone usage is at its highest level ever and it is changing us – even **encoding** us and there are early indicators of concern about where this is leading.
- We are fascinated with health, but the bewildering advice out there can result in either giving up or adopting a ‘new faith’ often based on what we hear on TV.
- Activity delivers health benefits, but there is evidence of a **desire to be included** driving some fitness behaviour suggesting we also have a new way to judge who is in or out.

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