

Sign of the times



Introduction



Introduction

- “Thank God that’s over!” was the audible response to the chime of 12 on New Year’s Eve all around Ireland.
- 2009 brought a catalogue of closures and scandals to our shores unseen for a generation. Every news broadcast seemed to disclose more tales of woe.
- Our economy lurched downwards and consumer confidence plummeted.
- There were lots of reports on what went wrong, lists of events of the year, but they detached from the real world.
- At Behaviour & Attitudes, throughout the year, we are presented with stories from individuals’ lives that give a unique perspective on Ireland today.
- This report presents what we have been hearing ‘from the horse’s mouth’ and what it means to be Irish in 2010.

Our approach

- Behaviour & Attitudes conducts market research for a variety of clients every week of the year. Whether it is online, by telephone, or face to face, we gather a continuous stream of new information.
- For the purposes of this project we conducted a series of group discussions at the end of December with Irish consumers aged between 18 and 60. This has been supplemented with data collected in our Telephone and face to face Barometers.

Our approach

- In order to enhance our understanding of consumer perceptions the groups were structured by 'life stage', social class and gender.
- Simply put experience of life, outlook, values and even the way we all express ourselves can vary by these factors and separating the groups in this way helps us to focus on these differences more clearly.
- We also wanted the people we invited along to prepare their thoughts for the session so that they were not just caught up with the 'mood on the night'. To this end each person completed a short questionnaire a few days before the group.
- Like all groups, the sessions were at times serious, but mostly there was a sense of engagement and fun.
- We talked about what's important right now, what it means to be Irish and our hopes for the future.

Our approach

Group	Gender	Age	Social Class	Lifestage
1.	Female	18-19	BC1	Students
2.	Male	25-34	BC1	Double Income No Kids Yet (DINKY)
3.	Female	35-44	BC1	Young Family
4.	Male	35-44	C2D	Young Family
5.	Female	45-54	C2D	Mature Family
6.	Male	55+	BC1	Empty Nester

All participants signed a release form allowing us to select short video clips from their feedback to use to illustrate this report.

First a
quick
reminder



2009 News stories



Even the weather had it in for us!

2009 Celebrity news

Michael Jackson Dies

X Factor fever

Jedward!

Stephen Gately dies

Tiger Woods extra marital 'transgressions'

Susan Boyle on Britain's Got Talent

Kanye West interrupts Taylor Swift

Natasha Richardson dies in ski accident

New Moon film follows Twilight success

Slumdog Millionaire wins Oscars

Avatar on way to biggest film of all time

Some new heroes, others lost or tarnished

On our minds in 2009

“Where is the Taoiseach?”

“Can I afford an iPod?”

“Who will replace Pat Kenny?”

“Will the teachers strike?”

“Will I lose my job?”

“Should I emigrate?”

“Will Irish team go to South Africa?”

“Is that sneeze swine flu?”

... Some questions remain unanswered

Main themes

Life Goes On

Despite everything, people are getting on with things pretty well

Fear & Loathing

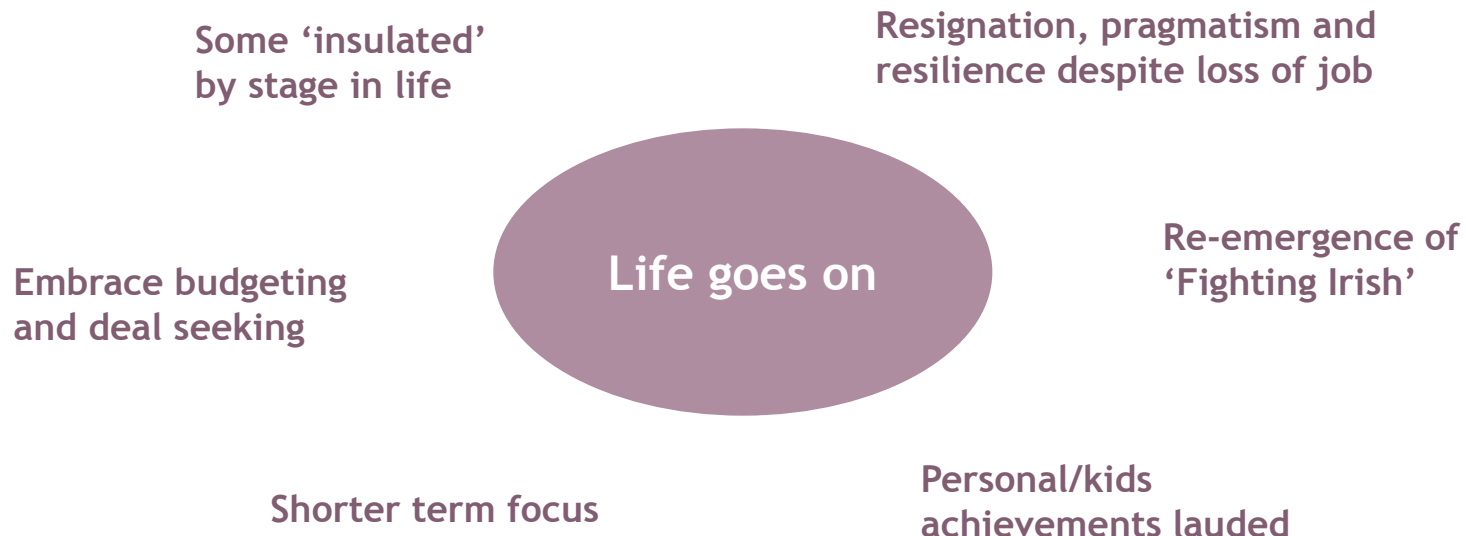
Faith in our institutions is at an all-time low and we don't think much of our values

Authentic Experiences

More than ever we need things we can trust

Main themes

“Last week my husband was made redundant. The way I see it is it could be a lot worse... we have a good family, fantastic friends... you have to make the most of it.”



From numbness or anger to resignation

Main themes

“You wouldn’t turn your back to a group of teens on the street, you might get knifed”

Public/private frictions

Sense of betrayal by the Church

No confidence in distant corporations - commercialism tainted

Fear & loathing

Loss of faith in leaders

Some fear ‘feral’ teens

Deterioration of moral values

A sense of losing our way

Main themes

“We lost ourselves during the Tiger years, we need to get back to reality...”



Greater appreciation of family & friends

The Recession

“Last 12 months was my Leaving Cert year which was very stressful on yourself and my family. What changed is that I’m now at college. And my boyfriend and I of the last 12 months just broke up so that’s a big change. My friends have stayed the same”

Jade, 19

“Things changed. Husband made redundant. Children not getting as much as they did before. Some of my sisters also made redundant. Money became scarce. Started shopping in Lidl, taking extra work.”

Louise, 43

“Last 12 months have been hard, as my mother has been ill. Money is tighter, my husband and children are still working and in good health though”

Anne, 50

“Tough economically for family and friends emigrating to find work. Moved out. I’m worried about job all the time”

Steve, 28

“Had a good year. Everyone in my family became closer, many friends got married. Pay cuts for most of my friends and family, but socialising has increased”

Sean, 36

“Some of my children moved out (voluntarily). Second son completed 3rd level education. Two old friends died, two others are ill”

Frank, 60

Good news in 2009?

“Did well in my Leaving and had an unbelievable summer with people I care about most”

Hannah, 19

“Spending time focusing on home life, instead of racing after good times. Bringing us back to reality”

Louise, 43

“Everyone healthy is the main thing. Totally addicted to X Factor. Travelling with friends in Europe”

Carol, 47

“Qualifying as a solicitor, Six Nations. Golf and the summer holidays”

Johnny, 27

“Spending much more time with my daughter. Watching Leeds do well. Getting golf handicap cut”

Anthony, 41

“My son finished his degree and my daughter completed her first year. Nice to have changing relationship with four adults now”

Arthur, 59

Emerging trends



Emerging trends for 2010

- Conspicuous restraint
- Home treats
- Discount chic
- Nesting
- Big Night In
- Pulling together
- Opting out



H&M

Emerging trends for 2010

Conspicuous restraint

- While many have had to cut back
 - ❖ Salary cut
 - ❖ Lost job
- Others are more restrained simply because of how it looks.
- In effect, there is pressure to conform to the austerity of the times.



Emerging trends for 2010

Home Treats

- There has been a rapid decline in visits to restaurants, but we still like to reward ourselves at home:
 - ❖ A carry out and a DVD
 - ❖ The Lidl bar of chocolate.
- Pub visits are less frequent, but there is still a bottle of wine in the fridge.



Emerging trends for 2010

Discount Chic

- We got used to little luxuries during the Tiger years.
- It can be hard to constantly deprive oneself nowadays.
- This is where shops own brand 'luxuries' have come into their own.
- Luxury at a discount still triggers impulsive behaviour.

dine in for two
€12.50

Menu
CHOOSE FROM A SELECTION OF
A MAIN MEAL
— + —
SIDE DISH
— + —
DESSERT
— + —
BOTTLE OF WINE
ALL FOR €12.50

dine in for two
€12.50

At M&S this weekend you can dine in with us for just €12.50

From a selection of products, choose a main course and vegetables for two, a dessert for two and a bottle of wine for just €12.50

Enjoy restaurant quality food in the comfort of your own home with your M&S, for just €12.50

Selected product and stores only. Excludes home and food to order. Subject to availability. PH5FOD902XX

Selected product and stores only. Offer runs Thursday to Monday. Subject to availability. See notice for details. PH5FOD902XX

Emerging trends for 2010

Nesting

- With a new property off the mental tick list many households have turned to sprucing up their home.
- Woodies and Ikea have come into their own as we turn from planning an extension to redecorating.



Emerging trends for 2010

Big Night In

- Many more people are staying at home to socialise.
- Even teens and twenty-somethings are organising social nights around the TV.
- X Factor has had an influence here, but also dinner parties, poker nights etc. have increased.



Emerging trends for 2010

Pulling Together

- Many comment that we ‘lost the run of ourselves’ during the boom years and we have returned to ‘community values’ now.
- Particularly for those a part time work or recently unemployed there is more engagement with neighbours and family.
- However this is also ‘talked up’ trend for many who feel we need to embrace community more (but in fact rarely meet their neighbours).



Emerging trends for 2010

Opting Out

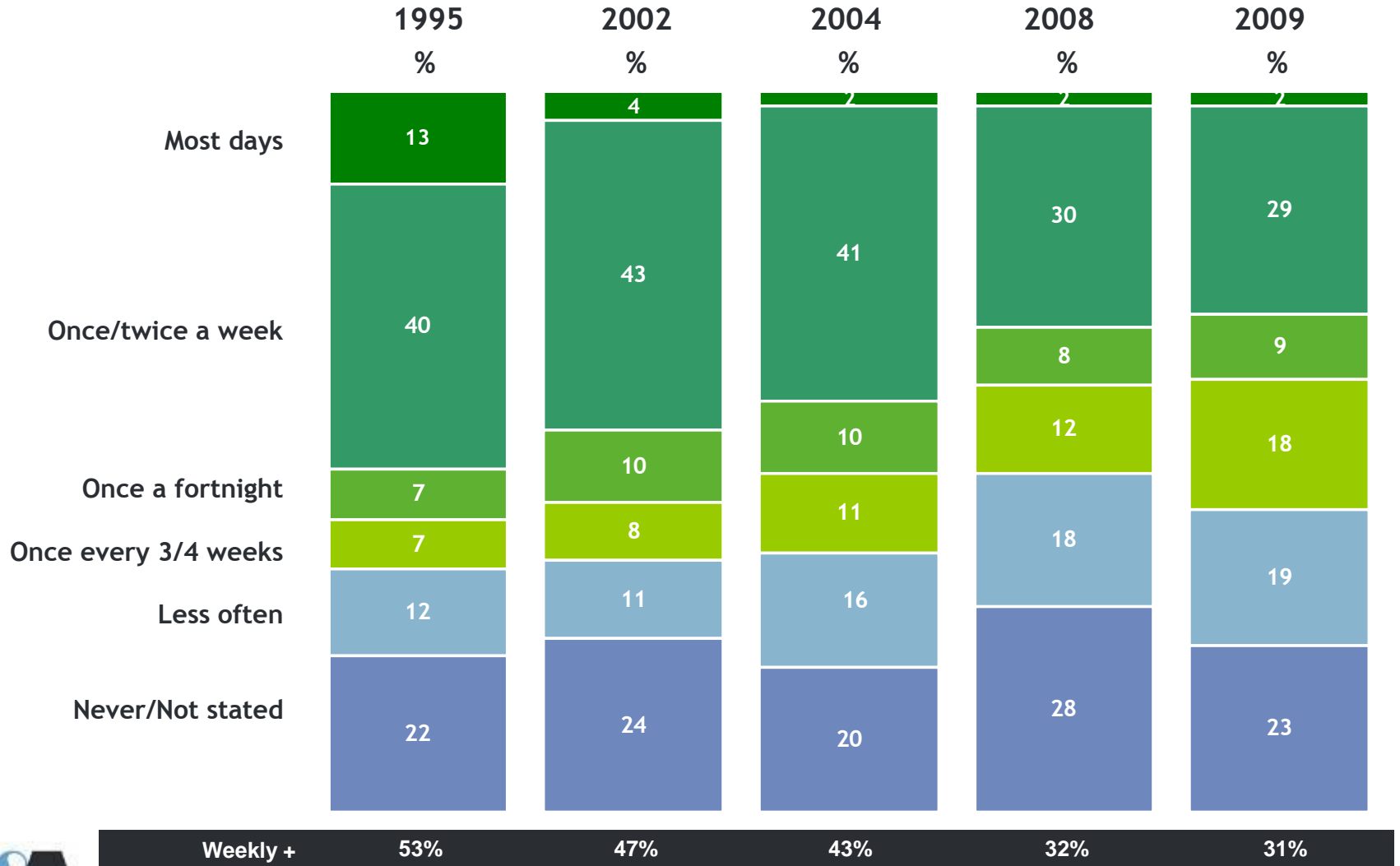
- Everybody looks forward to experiences overseas whether they are 18 or 55.
- It is the under 30s who are seriously considering emigration.
- Ireland has a long history of exporting its youth and talent and this has returned as a trend.



Leisure trends



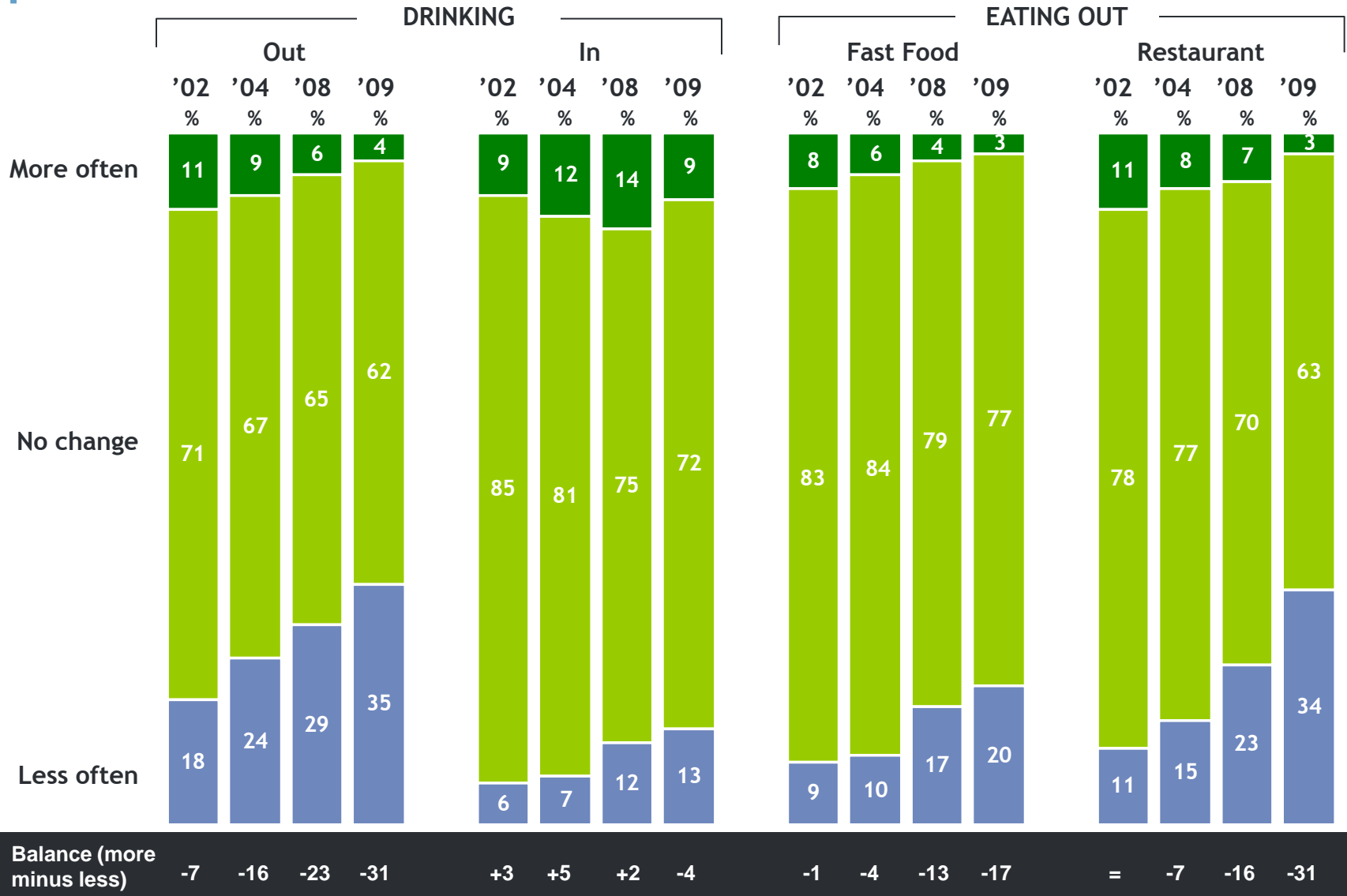
Frequency of Drinking Out 1995 - 2009



The decline in drinking out of home may be halting: now 31% weekly + versus 53% fourteen years ago (dropping one percentage point per year)

Relative Shifts in Eating/Drinking Patterns

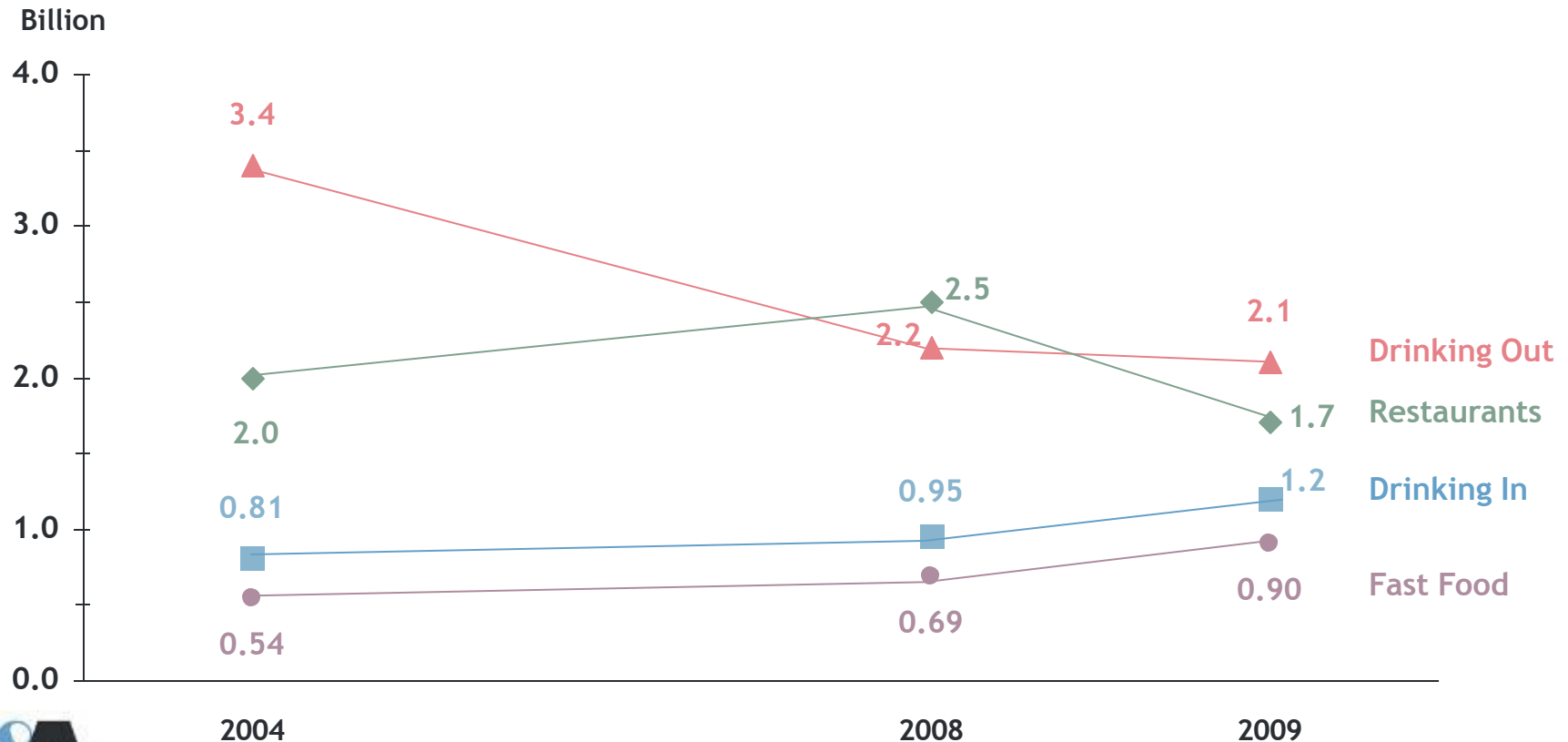
Comparisons 2002 - 2009



Everything felt to be in decline but particularly drinking out and eating out (although drinking at home the most resilient).

Spend Shifts in Overview

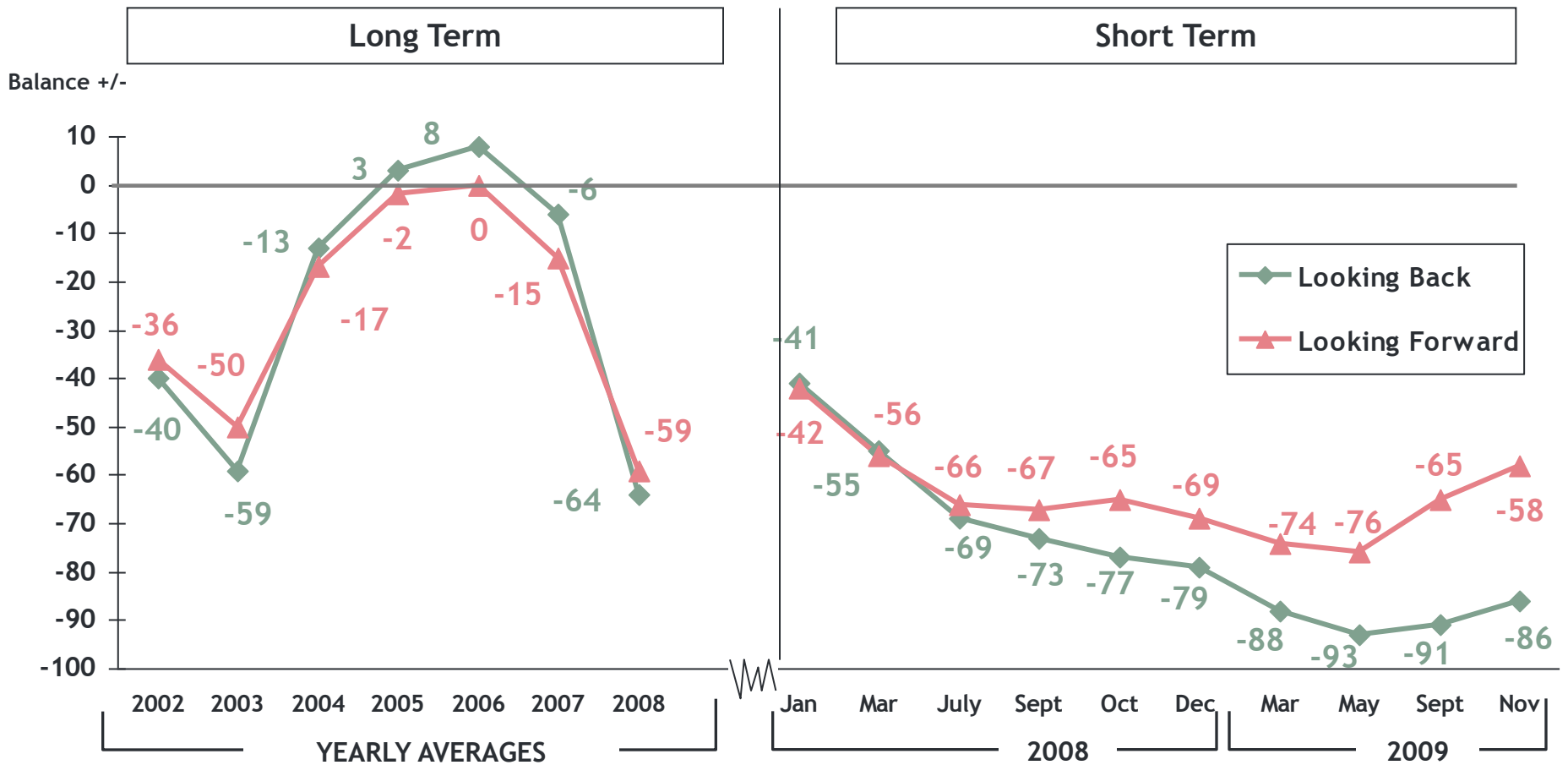
- Number of 18+ adults : 3,362,000
- Average fortnightly leisure spend amongst total population is €68.71.
- Annual leisure spend projected at €6.0billion ... 5% less than in 2008 (6.3bn).



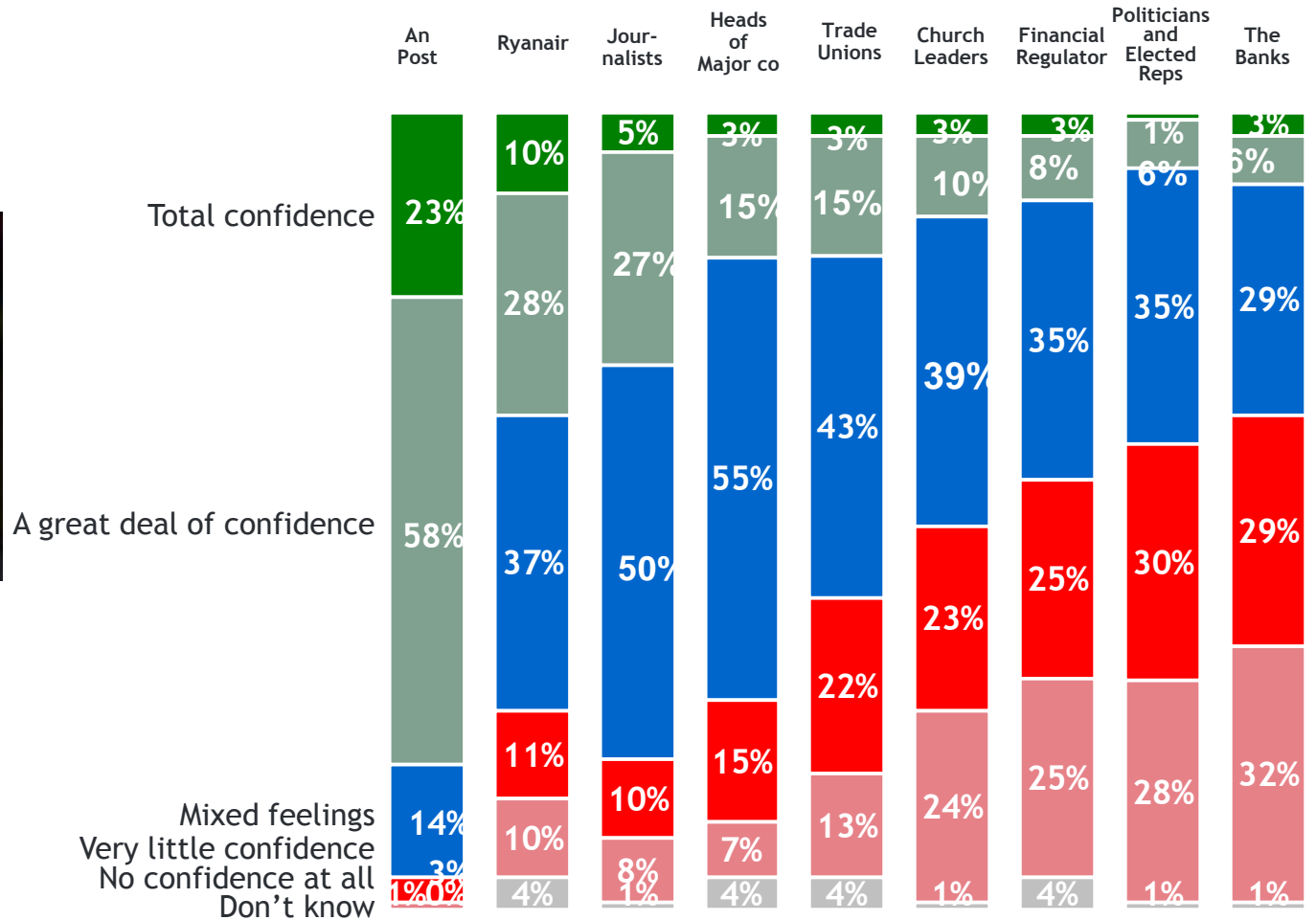
Public confidence



Balance Of Opinion Economy



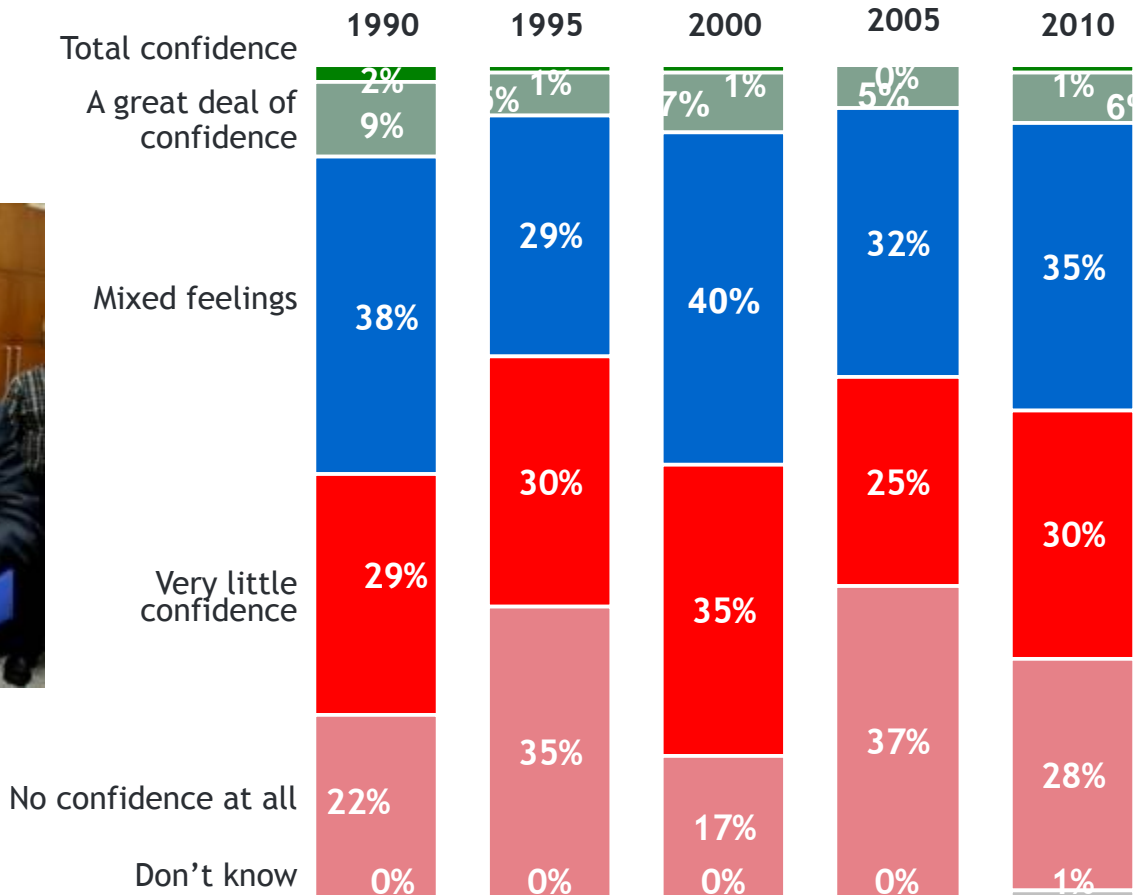
How much confidence do we have in our great leaders?



Any Confidence:	80	39	30	17	17	11	11	7	8
No confidence:	4	20	17	23	28	50	52	58	65

Not a great deal it has to be said!

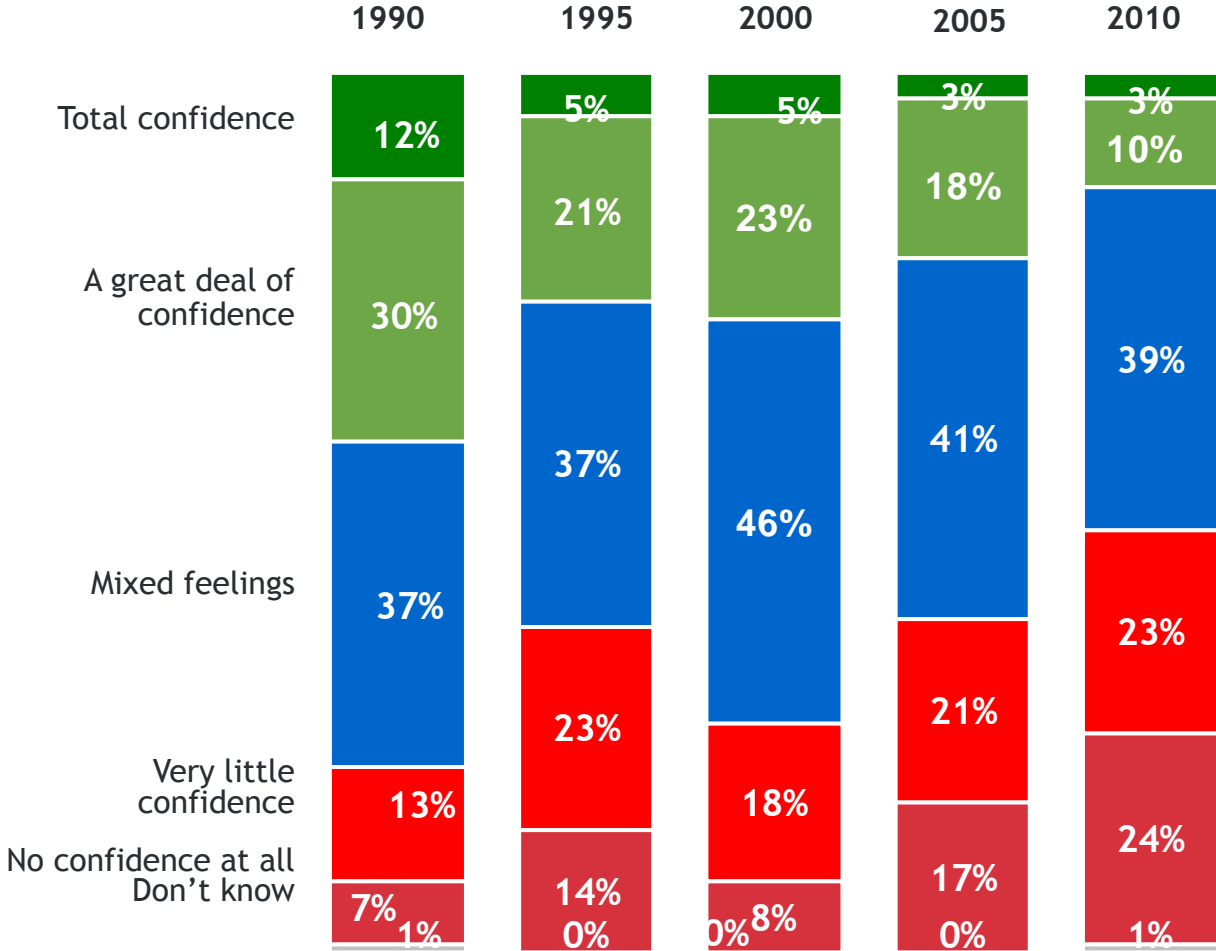
Well as it happens the politicians have always been damned....



Any Confidence:	11	6	8	5	7
No Confidence:	51	65	52	62	58

And we had even less confidence in them back in 1995!

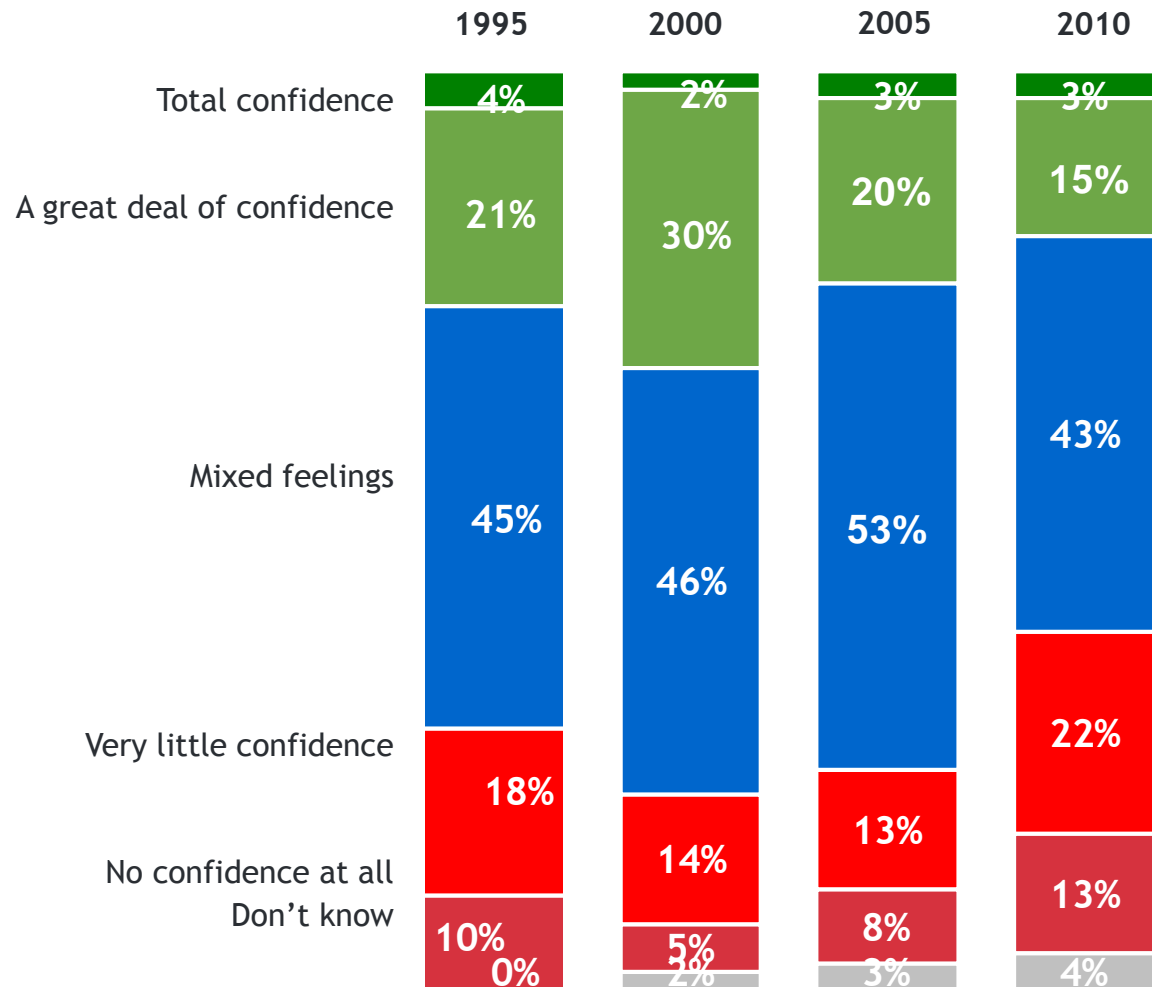
And church leaders have been on the slippery slope for quite some time now..



Any Confidence:	42	26	28	21	11
No Confidence:	20	37	26	38	50

J.1694

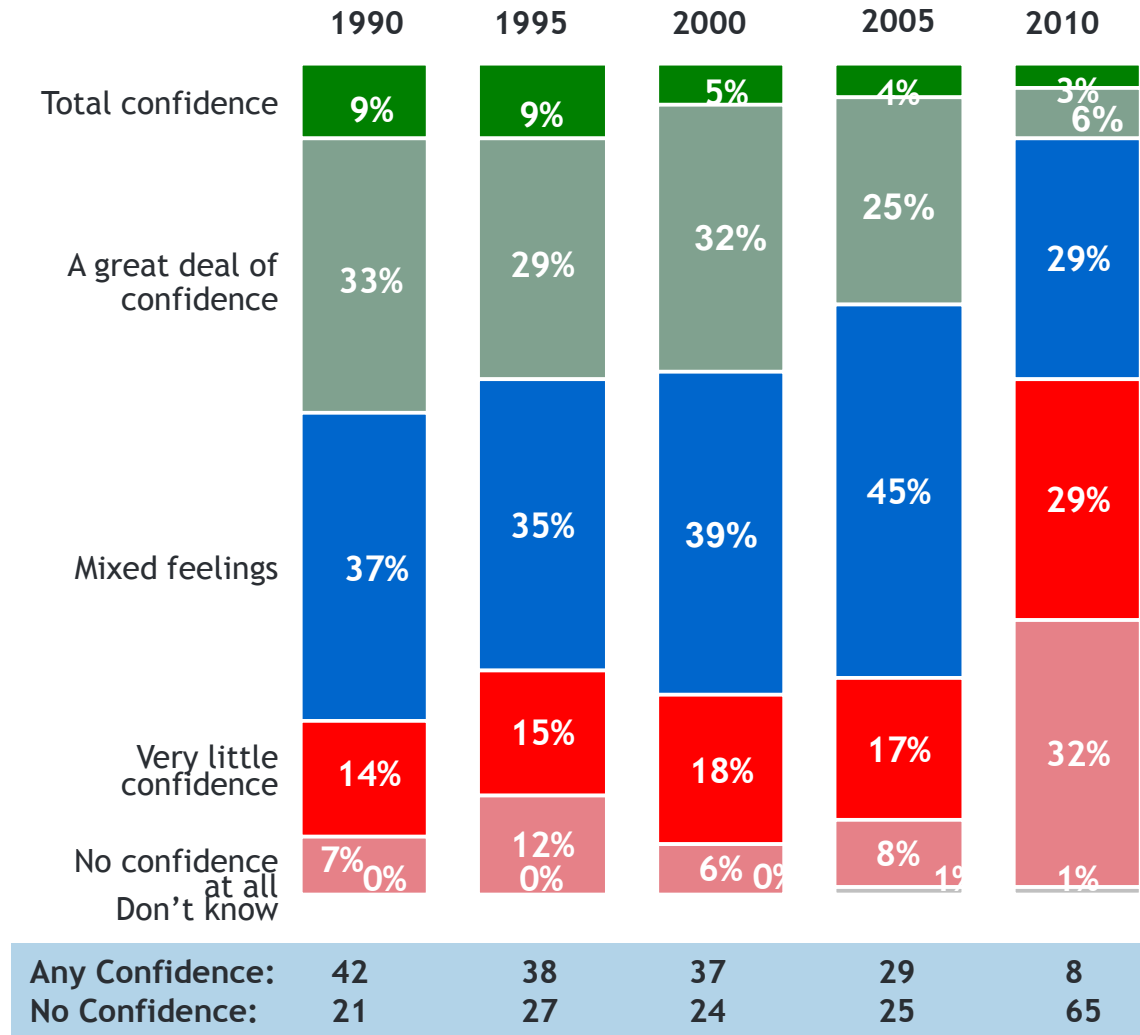
Confidence in the Trade Unions rises and falls with tide..



Any Confidence:	25	32	23	17
No Confidence:	28	19	21	38

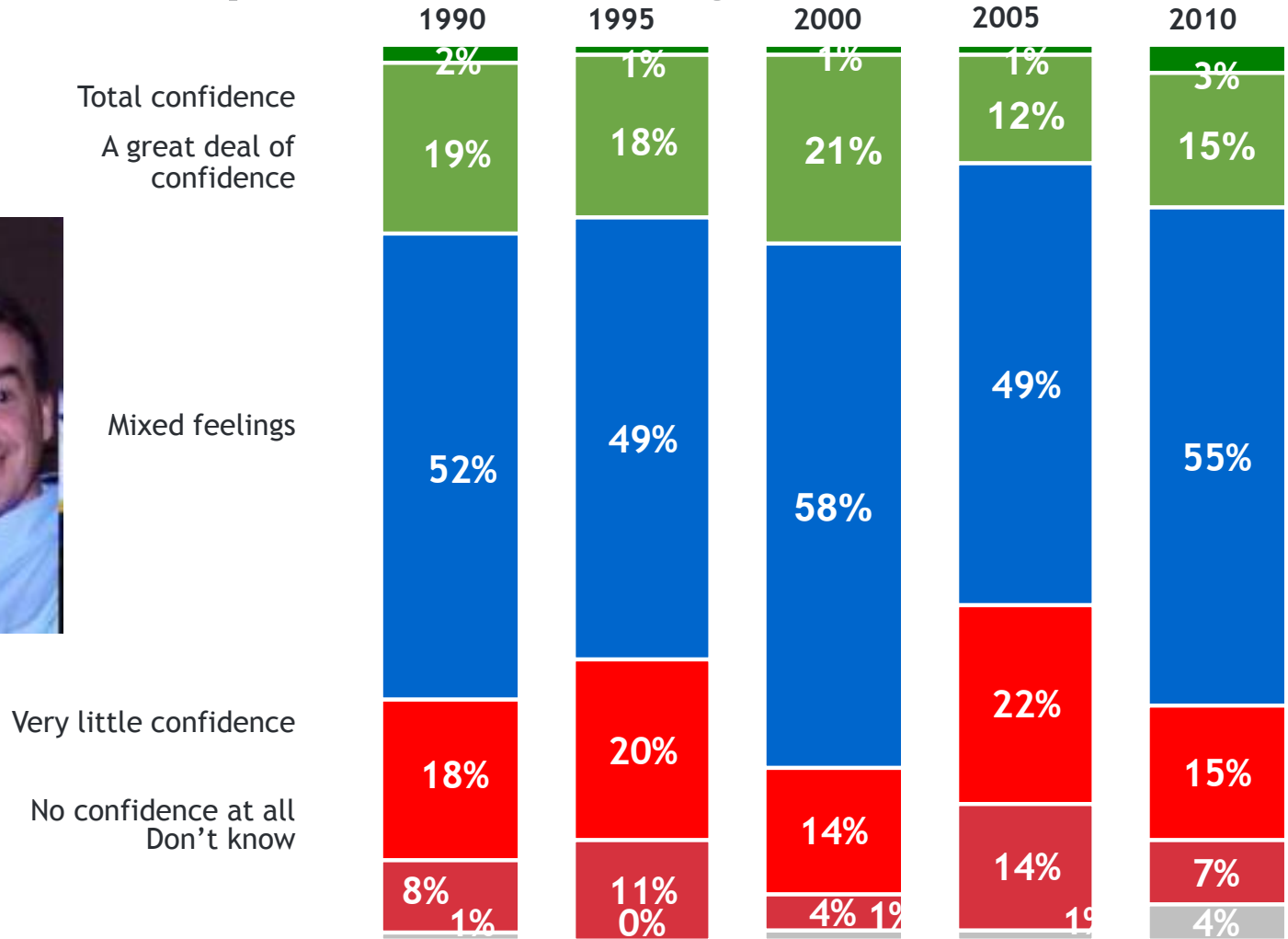
But confidence in them is at an all time low

Not surprisingly the banks have just ‘fallen off the cliff’



Two thirds of the Irish public have little or no confidence in the banks – Even though they are paying to keep them afloat!

And the Irish public don't really believe our captains of industry are capable of coming the rescue



Any Confidence:	21	19	22	13	17
No Confidence:	26	31	18	36	23

Confidence is not high!



CONFIDENCE

Confidence Is The Key To Great Acts Of Stupidity

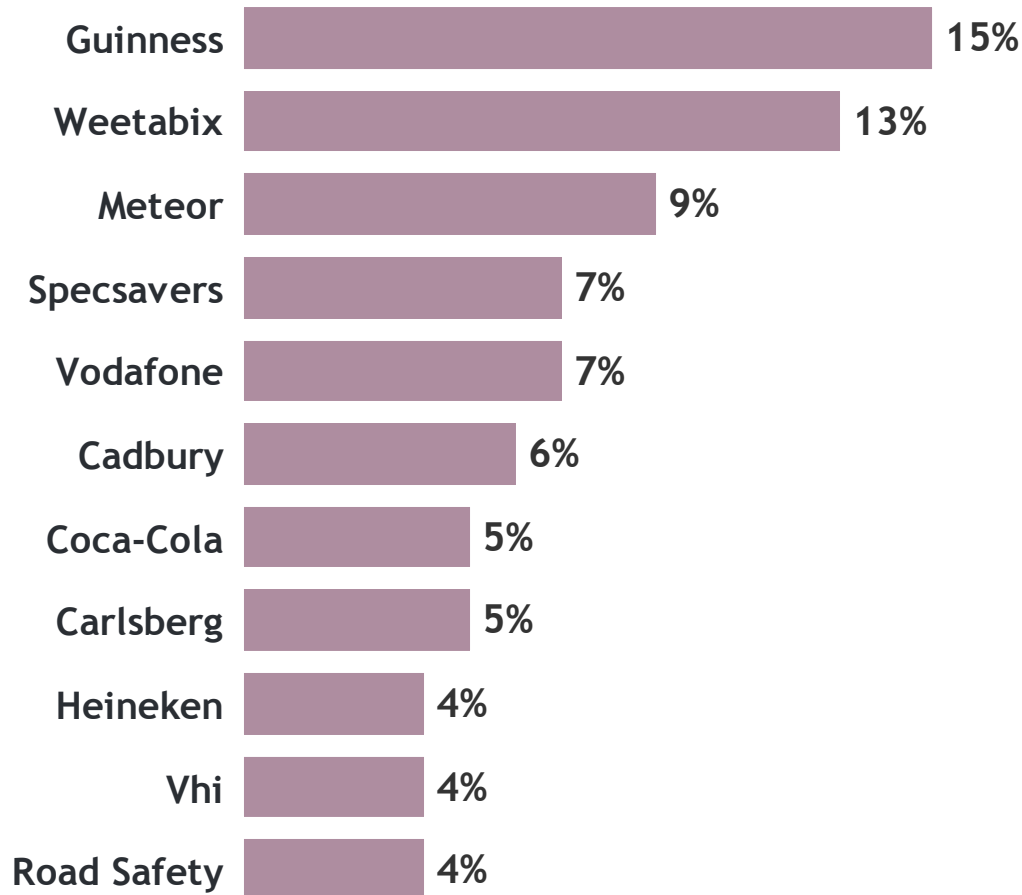
*Is it too much to hope
that our
lack of confidence
may mean
prudent
decisions will be made
for our future?*

Advertising of the year



Top ads of 2009

Base: All adults 16+



All others 3% or less

Two ads ahead of the game - Guinness and Weetabix. But clearly the appeal of ads is very diverse. The 'tail' on ads nominated is extremely long.

Top ads of 2009

Base: All adults 16+

	TOTAL	SEX		AGE				
		Male	Female	16-24	25+34	35-49	50-64	65+
<i>Unweighted Base:</i>	1011	506	505	158	228	277	209	139
	%	%	%	%	%	%	%	%
Guinness	15	22	9	10	16	14	21	16
Weetabix	13	13	13	16	13	12	13	13
Meteor	9	8	9	12	11	12	5	2
Specsavers	7	6	7	5	6	7	8	8
Vodafone	7	7	6	11	7	9	3	3
Cadbury	6	4	8	12	7	5	3	6
Coca-Cola	5	4	5	12	6	3	2	2
Carlsberg	5	7	3	7	6	3	4	6
Heineken	4	6	2	6	4	5	4	1
Vhi	4	3	5	3	3	6	5	1
Road Safety	4	4	4	5	2	4	4	4

Guinness holds a 2:1 lead over Weetabix among men and those over 50 but has considerably less appeal amongst women. Younger adults demonstrate greater consistency in the ads they like with the mobile phone operators, Cadbury and Coca Cola all holding a strong position for this target audience.

J.1694

All others 3% or less 42

Top ads of 2009

Base: All adults 16+

	TOTAL	SOCIAL CLASS			REGION			
		ABC1	C2DE	F	Dublin	Leinster	Munster	Conn/ Ulster
<i>Unweighted Base:</i>	1011	434	501	76	288	259	288	176
	%	%	%	%	%	%	%	%
Guinness	15	18	14	9	24	16	11	8
Weetabix	13	14	12	19	5	14	17	18
Meteor	9	10	8	5	8	9	12	5
Specsavers	7	8	5	14	6	12	6	3
Vodafone	7	11	4	3	11	6	4	5
Cadbury	6	7	6	4	7	4	8	6
Coca-Cola	5	7	3	5	5	4	4	6
Carlsberg	5	4	6	1	4	9	3	3
Heineken	4	4	5	3	4	4	5	5
Vhi	4	3	5	8	5	3	3	6
Road Safety	4	4	4	2	1	4	8	1

Also some differences by social class and region with Guinness performing extremely well in Dublin, for example.

Top ads of 2009

The Cadburys ad with the ape on the drum. It just makes me want to eat chocolate. Teen

*The Weetabix ad with the horse jumping - hilarious!
Teen*

*I like the Yorkie advert.... It is funny.
Teen*

Guinness Christmas, home of the black stuff, ESB Chris Rea Driving Home for Christmas, lit farmhouse, Renault Clio Nicole! Empty nester

*The Meteor ad Carol singers - it's cheerful, festive, humorous, I know what the ad is about, you remember the product.
The Diet Coke advert - it's fun, lifts your spirits.
Young family*

*The advert that grabs my attention at the moment is the Meteor ad where they text all their friends when there is a carol off and the Coca-Cola ad with the trucks all lit up.
Young family*

The drink driving ad where the person in question took a chance, drove home, wrecked his car, ended up as a vegetable, lost his ability to play sports, lost girlfriend and work. Young family

*Barclaycard ad with slide that brings man all the way home
Mature family*

*The Bulmers Christmas Ad is brilliant. The Pears Bulmers ad was excellent. The characters are very funny. They've kept the same characters for the Christmas ad.
DINKY*

Concluding thoughts



Concluding Thoughts

- Over the year we have moved from feeling like we are ‘frozen in the head lights’ through a sense of numbness or anger to a **universal sense of resignation**.
- We all take pride in being Irish but feel let down by our leaders and embarrassed by our boom years behaviour.
- We despair for the values of our youth and sense we have lost our way.
- The questions facing us in 2010 are not just financial. In the past we could grab hold of Christian morals, or a liberal agenda, the profit motive or the environmental lobby.
- We said it was okay to seek reward and luxury because we worked so hard.
- There is now a need to reassess and adjust. It is a time of transition.

Concluding Thoughts

- Recent economic collapse comes at the end of a wave of exaggerated optimism, spending and liberalising values. It is sometimes with a sense of guilt that people talk about the benefit of returning to ‘older values’ or a ‘back to basics’ approach to life. There is even a sense of coming down to earth to ‘real Ireland’.
- At this time of resignation and reassessment few have confidence in the church to guide us. We have steadily been losing confidence in the church for many years and recent events have further distanced the church hierarchy from the population.
- There is little confidence in our political leaders but this is actually fairly consistent with our long term outlook. We never really trusted them anyway.
- The banks have fallen furthest in our estimation of course but like the politicians we seem to just carry on with what we know rather than try to make a radical change.
- So what do we want?

Concluding Thoughts

- **We want strong leadership.** Obama's election gave us all a model for intelligent leadership but there seemed to be a long period when there was no clear route forward. At a time of crisis and change we need to know that someone has a plan. We want to feel there is clarity and certainty at the top of government. Brian Lenihan emerged this year as a leader with conviction and determination. His handling of his cancer diagnosis has deepened public affinity.
- **We respond to dedication and integrity.** This year X factor was a huge draw. It was hard to avoid the hype. But it was actually a moment from Britain's Got Talent that left a more permanent mark on the Irish zeitgeist. When Susan Boyle came on the stage everyone assumed they were in for a treat, a chance to laugh at the sad old woman who wants to be on TV. When she began to sing the shock on the judges faces was mirrored by everyone's realisation we too had prejudged her. Her dedication and integrity as much as our jaded cynicism is the real message here.
- **We need escapism.** The news media have been unremitting in the accurate communication of doom and gloom. Some have stopped listening to the news, others buy extra newspapers. But everyone has welcomed a bit of escapism, whether it is in Desperate Housewives or Avatar.

Concluding Thoughts

- Facing into 2010 we have some insights about Irish people at the end of a tough year.
- Perhaps the most important is that people are ‘getting on with it’.
- Simply, you can only stay in shock or anger for so long and then life goes on.
- We are rediscovering each other, there is a sense of shared perspective and greater interest in being involved.
- In the autumn of 2009 there were some who felt that the country might fall apart, but we feel there is evidence for greater optimism.

Sign of the times

