

Opinion Poll

EFFECT OF RECESSION: USE OF SERVICES

A OVER THE LAST YEAR HAVE YOU REDUCED OR TRIED TO REDUCE YOUR USAGE OF THE FOLLOWING:

B OVER THE NEXT YEAR DO YOU THINK YOU WILL REDUCE OR TRY TO REDUCE YOUR USAGE OF THE FOLLOWING

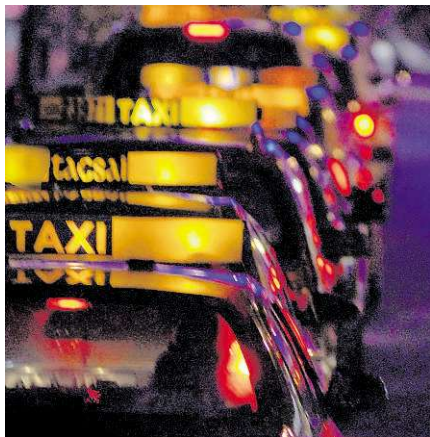
TAXIS

Over last year

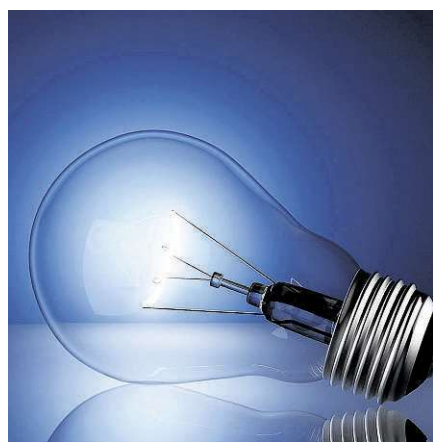
Reduced31%
Not reduced54%
Don't know2%
Not applicable14%

And over next year

Will reduce29%
Will not reduce51%
Don't know6%
Not applicable14%



ELECTRICITY



Over last year

Reduced36%
Not reduced62%
Don't know2%
Not applicable1%

And over next year

Will reduce35%
Will not reduce57%
Don't know7%
Not applicable1%

NEWSPAPERS

Over last year

Reduced29%
Not reduced67%
Don't know1%
Not applicable2%

And over next year

Will reduce29%
Will not reduce62%
Don't know6%
Not applicable3%



GIFTS FOR FAMILY/FRIENDS



Over last year

Reduced36%
Not reduced62%
Don't know1%
Not applicable1%

And over next year

Will reduce36%
Will not reduce56%
Don't know6%
Not applicable2%

HOME HEATING



Over last year

Reduced33%
Not reduced65%
Don't know1%
Not applicable0%

And over next year

Will reduce34%
Will not reduce59%
Don't know6%
Not applicable1%

PERSONAL CARE

Over last year

Reduced27%
Not reduced70%
Don't know1%
Not applicable1%

And over next year

Will reduce25%
Will not reduce67%
Don't know6%
Not applicable2%



DRIVING A CAR



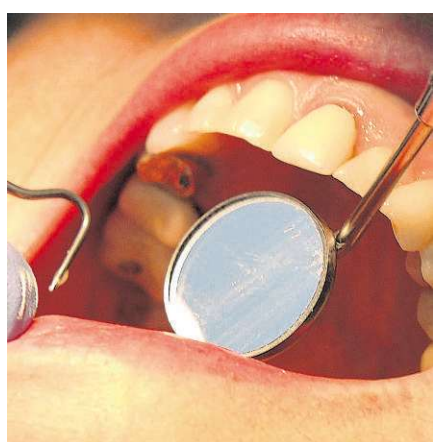
Over last year

Reduced19%
Not reduced72%
Don't know2%
Not applicable7%

And over next year

Will reduce19%
Will not reduce67%
Don't know6%
Not applicable8%

DENTIST VISITS



Over last year

Reduced18%
Not reduced79%
Don't know2%
Not applicable1%

And over next year

Will reduce18%
Will not reduce76%
Don't know6%
Not applicable1%

SHOPPING ONLINE



Over last year

Reduced17%
Not reduced56%
Don't know4%
Not applicable23%

And over next year

Will reduce16%
Will not reduce53%
Don't know8%
Not applicable23%

GP VISITS



Over last year

Reduced16%
Not reduced82%
Don't know1%
Not applicable0%

And over next year

Will reduce15%
Will not reduce78%
Don't know6%
Not applicable1%

SATELLITE/DIGITAL TV

Over last year

Reduced15%
Not reduced78%
Don't know2%
Not applicable4%

And over next year

Will reduce19%
Will not reduce70%
Don't know7%
Not applicable5%



PUBLIC TRANSPORT

Over last year

Reduced12%
Not reduced76%
Don't know1%
Not applicable11%

And over next year

Will reduce11%
Will not reduce72%
Don't know5%
Not applicable12%



MEDICINES

Over last year

Reduced11%
Not reduced88%
Don't know0%
Not applicable1%

And over next year

Will reduce9%
Will not reduce84%
Don't know6%
Not applicable1%



CHILDREN'S ACTIVITIES/CLASSES

Over last year

Reduced10%
Not reduced56%
Don't know4%
Not applicable30%

And over next year

Will reduce10%
Will not reduce52%
Don't know8%
Not applicable30%



HEALTH INSURANCE



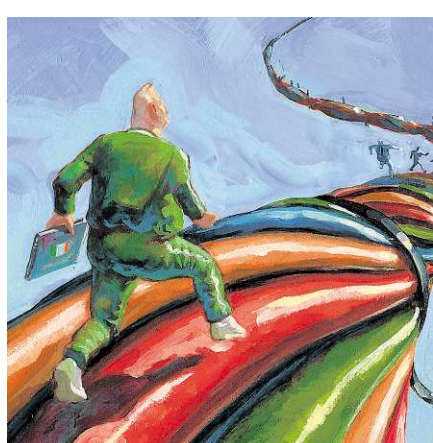
Over last year

Reduced10%
Not reduced77%
Don't know3%
Not applicable10%

And over next year

Will reduce9%
Will not reduce73%
Don't know7%
Not applicable10%

HOME BROADBAND



Over last year

Reduced9%
Not reduced78%
Don't know2%
Not applicable11%

And over next year

Will reduce11%
Will not reduce72%
Don't know6%
Not applicable12%

BABYSITTING



Over last year

Reduced8%
Not reduced53%
Don't know5%
Not applicable34%

And over next year

Will reduce8%
Will not reduce49%
Don't know8%
Not applicable34%

CHILDCARE/CRECHE



Over last year

Reduced7%
Not reduced54%
Don't know5%
Not applicable34%

And over next year

Will reduce6%
Will not reduce51%
Don't know8%
Not applicable34%

Relying on family, friends and ourselves



IAN McSHANE

ANALYSIS

There is limited public faith in the ability of church or State to guide us through recession

SATURDAY'S POLL revealed that, while people have been profoundly affected by the dramatic economic downturn in terms of their ability to cope financially, most have maintained a stoic determination to see the crisis through.

Today's poll focuses on the specific coping mechanisms the general public have adopted over the last 12 months, and those they are likely to assume between now and an economic recovery.

We saw on Saturday that at least one in four of our opinion poll respondents indicated that either they, or someone else in their household, has lost their job as a direct result of the recession.

In other words, at least 800,000 people have been directly affected by job losses over the last 18 months or so. In addition, one-third of households either experienced reduced working hours or reduced levels of pay.

As a result, a whole raft of cost-cutting measures has been implemented as people struggle to balance reduced incomes with continuing living expenses.

One of the most remarkable findings in this regard is the proportion of individuals (approximately one-third of those identifying themselves as the head of their household) who have reduced their use of household electricity and home heating in an attempt to control expenses.

As with so many of the findings emanating from this year's poll, such draconian measures apply across all types of households, regardless of what their relative incomes might be. As such, we have ample evidence that the effects of this recession are far-reaching, with few sections of society escaping its clutches.

September's Behaviour & Attitude's Consumer Confidence Monitor indicated that both expected personal income levels and purchasing intentions for the year ahead were at their lowest since the tracker began.

In the main, Government statistics would support the contention that consumer spending will continue at very low

Just 11 per cent suggest they will reduce use of public transport

levels until at least the middle of next year.

It is more difficult to gauge the pending Christmas shopping period will fare, with the possibility that some will dip into their savings over the festive season as an antidote to the doom and gloom of 2009.

With regard to projected Christmas consumer spending, it does not augur particularly well for the retailers that more than one-third of all Irish adults indicate that they will reduce spending on gifts for family and friends as yet another household budgetary control.

At a more fundamental level, it must surely be of concern that almost one in 10 indicate that they will reduce, or attempt to reduce their use of medicines over the next 12 months, while a significant 15 per cent of all survey respondents intend to cut back on visiting their GP.

Coupled with the fact that the equivalent of 600,000 people suggest they will reduce their use of dentists' services, there is a real danger that this recession may have longer term implications for the physical health of the population at large.

People's intended means of transport over the next year might, however, have more subtle implications with regard to the future adoption of more environmentally friendly options. Thus, one in five state that they



intend to reduce, or try to reduce, their car usage over the next year, with almost three in 10 (rising to over four in 10 of the more socially active 18-34-year-olds) intending to cut back on their use of taxis.

On the other hand, just 11 per cent suggest they will reduce their use of public transport as a means of economising. If these suggested shifts in consumer behaviour towards more environmentally friendly modes of transport do actually come to pass, we may witness a longer term environmental benefit emerging from the economic crash.

While we automatically tend to think of household-related cost-cutting measures in attempting to understand people's financial coping mechanisms, it is

of course also the case that social activities have typically accounted for a significant proportion of disposable income. Indeed the hospitality sector is a critical element of our economy, and is a special case insofar as it relies quite heavily on the number of overseas travellers visiting our country.

At a time when industry bodies are calling for Government intervention to rescue our ailing hotels and restaurant sector, it is worrying to note that 41 per cent of the population tell us that they will be eating out in restaurants less frequently in the year ahead compared to this year. A similar proportion claim that they will be visiting the pub less often in the future, suggesting that there may well be merit in some type of sector support package in the forthcoming budget.

Finally, we finish today's coverage of the 2009 social poll with some insights as to the individuals or institutions we have been turning to for emotional comfort and reassurance during these trying times.

The graph on the opposite page illustrates the responses elicited by this question. Note, the percentages will add to more than 100 per cent as those polled could choose more than one answer option each.

When any mention of either male or female family/friends is calculated, it emerges that just

We may witness a longer term environmental benefit from the crash

under six in 10 will rely on personal relationships to carry them through periods of emotional turmoil. People's partner/spouse becomes, as would be expected, a more important source of strength among the older age groups and, curiously, for those who come from a middle to professional socio-economic background.

This same question was in fact administered in last year's men's poll, and on 2007's women's poll. A comparative analysis between all three surveys indicates that there has been a marginal decline in the proportion of Irish women relying on the Catholic Church for emotional support between 2007 (20 per cent) and 2009 (17 per cent).

A similar decline in deference towards the Catholic Church is evident in the male population between 2008 (14 per cent) and this year (11 per cent).

All in all, therefore, the same core message emerges from today's coverage of the poll as from yesterday's. Namely, that people will be drawing upon their own inner resources and the support of friends and family in navigating their way out of this recession, with limited faith in either church or State to guide them along the way.

Ian McShane is managing director of Behaviour & Attitudes