



permanent tsb

Reflecting Ireland

An insight into consumer
behavioural change in Ireland



KANTAR

Representatives of our Colleague Network Groups

Executive Summary

From a distance, it may seem gender equality is something we don't need to worry about. But how far down the road to equality are we today? As we approach International Women's Day, this quarter our Reflecting Ireland research focuses on our attitudes and behaviours related to gender equality in Ireland from the perspective of both women and men in Ireland today. Our research, conducted in partnership with Kantar, is very revealing. It shows that, despite the progress made to date, we have nothing to be complacent about.

We've teamed up with Claire Cogan of BehaviourWise as we learn from a behavioural science perspective that, even when gender equality legislation is in place, it is usually not enough on its own to deliver equality. Attitudes and day-to-day behaviours give us a clearer picture of the true extent of gender equality in society.

Our research looked at three areas: work life, media and advertising, and home life. We also look at where both genders are aligned, and where they diverge.

- In the broader scheme of things, gender equality ranks lowest among the issues affecting the Irish population today.
- The top issues concerning us at the moment are the cost of living (62%), the price of housing (47%), access to quality healthcare (46%), homelessness (40%) and rising rents (35%), all of which come ahead of Covid-19 (23%). We seem to have put worry about the pandemic behind us as we become increasingly preoccupied by the rising cost of living.
- Irish men and women are aligned on our progress to date, with 62% in each case agreeing that Irish society has made great progress on gender equality over the last decade. 7 out of 10 believe that achieving gender equality is a shared responsibility between men and women with little difference between the sexes; 71% of women, 66% of men.
- Perhaps unsurprisingly, women attach much more importance to enforcing gender equality at 77%, compared to men at 56%, a difference of 21%.
- Women's views on gender equality are strongest when it comes to working life, and it is here where we see the greatest divergence from men's views. Almost 3 in every 4 women (72%) feel women have to work harder than men to achieve the same level of success in their career, compared to 46% of men, a gap of 26%.
- One in every two women feel it's fair to have gender quotas in areas where women are under-represented, including politics and senior management. Only 1 in every 3 men agree. It seems the general principle of gender quotas sits better with women: 46% feel it's fair to have gender quotas in areas where men are under-represented. This falls to 30% among men.
- Women are more likely than men to feel frustrated about trying to balance work and family (37% vs. 24%), that their career could suffer from trying to juggle work and home life (36% vs. 24%), that the boundaries between work and home life are blurring (34% vs. 28%) and that this leaves them with a sense of being 'always on' (34% vs. 24%).
- A narrative emerging from the pandemic internationally is that lockdowns and restrictions have led to women taking on more of the household and caring duties than men, exacerbating gender inequalities that already existed. Our research points to a similar pattern in Ireland. Over half of Irish women (53%) feel that gendered roles have become more 'traditional' as a consequence of the pandemic, with women taking more responsibility for caring in the home than before.
- Three quarters of women (76%) feel women get a raw deal when it comes to body image, but less than half of men agree (46%). At 30%, this is the widest gap between the views of men and women.
- The power of female role models to inspire others is evident, with 67% of women agreeing that successful women in the public eye inspire them, vs. 39% of men.

The Reflecting Ireland research series was conducted in January 2022 among a nationally representative sample of 1001 adults aged 18+ in the Republic of Ireland.

From a distance, all looks good.

From a distance, it may seem gender equality is something we don't need to worry about. In his 2021 book *In Fact: An Optimist's Guide to Ireland at 100*, Mark Henry quotes a newspaper article which highlights the improvements in women's lives since Ireland achieved independence, and in particular over the last 50 years:

"As recently as the 1970s, most were unable to drink a pint in a pub (half-pints only, if you were permitted entry), to sit on juries, to collect their children's allowance (the legislation specified it had to be paid to the father), to get a barring order against a violent partner or to refuse to have sex with her husband".

*1

Since the 1970s, we have had two female Presidents. The majority of Irish women now have a third-level education and, ever since 2000 the percentage of women in third level has exceeded that of men. Each year since 1971 the percentage of women entering the workforce has increased. Henry points out that the improvements achieved for women since the 1970s have not only benefitted women, but Irish society at large:

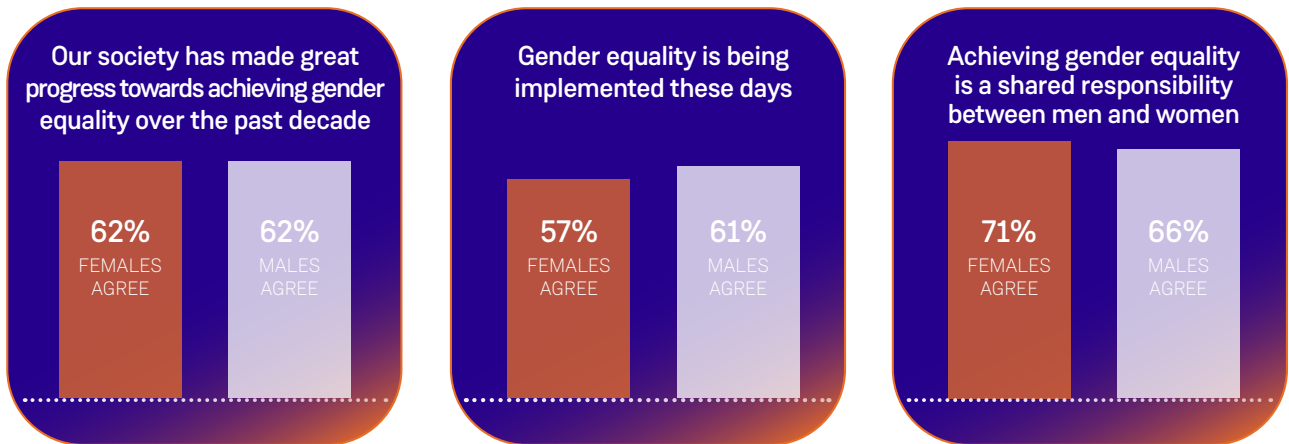
"... the further we travel down the road to equality, the better it will be for all of us".

*2

This echoes the UN view that "it's proven that empowering women and girls helps economic growth and development" and explains why Gender Equality is one of the UN's Sustainability Development Goals. *3

Where the genders are aligned:

Men and women are aligned on the progress made in recent years, and that achieving gender equality is a shared responsibility.



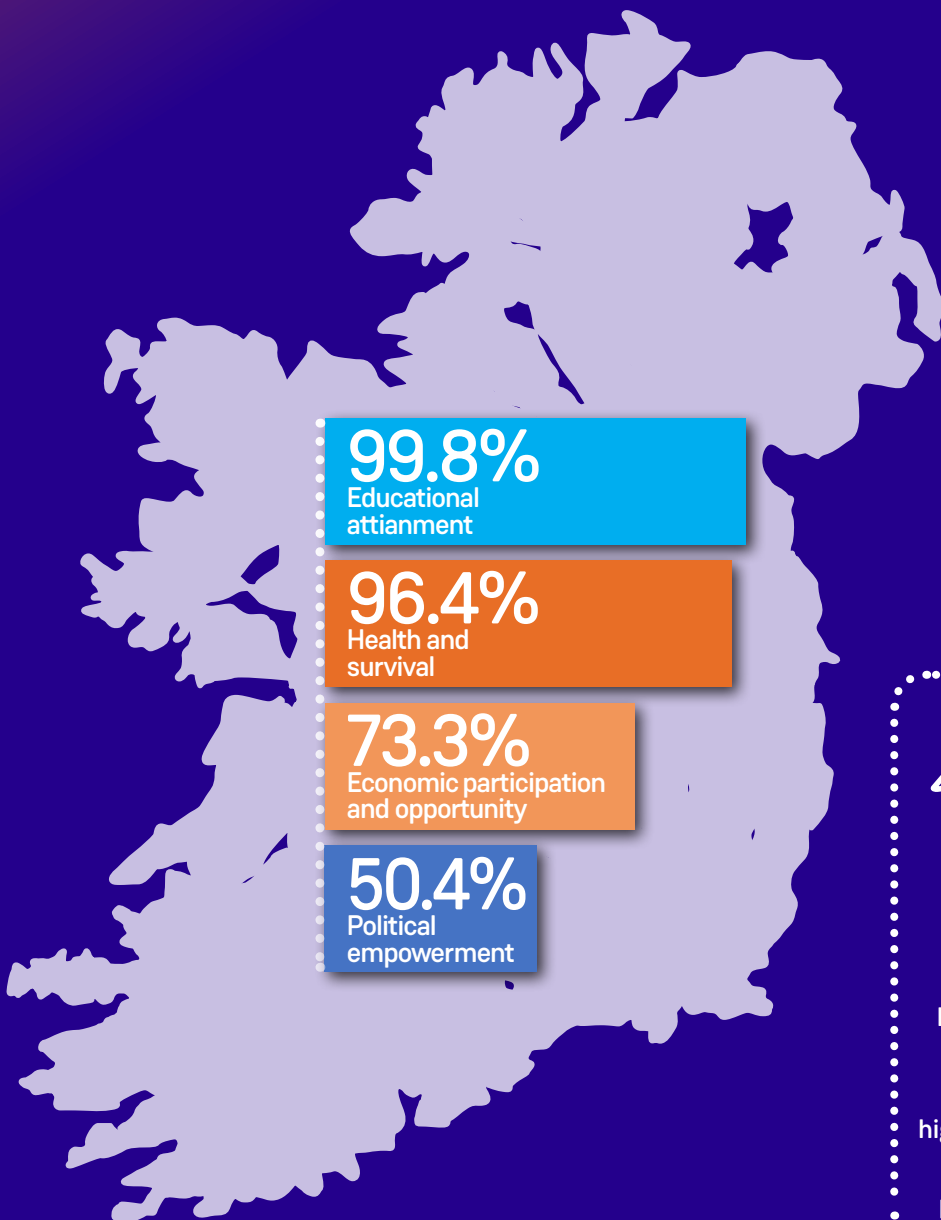
Irish men and women are aligned on our progress to date, with **62% in each case** agreeing that Irish society has made great progress towards achieving gender equality over the last decade. A similar percentage of men and women feel gender equality is being implemented these days, slightly higher for men at **61% vs. 57% for women**. The majority of us, **7 out of 10**, believe that achieving gender equality is a shared responsibility between men and women with little difference between the sexes; **71% of women, 66% of men**.

We agree more needs to be done.

Most of us have a sense that more needs to be done, with only **20%** of people believing that gender equality is well-developed in Ireland. This is lower **among women at 15% compared to men at 25%**, but in each case constitutes a sizable minority.



Since 2006, the World Economic Forum tracks progress across countries on closing the gender gap based on its Global Gender Gap Index. The latest update, published in March 2021, a year into the pandemic, includes 156 countries. ^{*4}



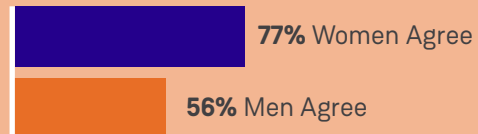
Overall Ireland ranks an impressive **9th out of 156** on gender equality. The purpose of the report is to identify effective measures to reduce gender equality gaps, summarised under four areas. In two of these areas Ireland has all but closed the gap: educational attainment (99.8%) and health and survival (96.4%), both close to a perfect gender equality score of 100%. In the remaining two areas however, Ireland still has work to do. These are: economic participation and opportunity (73.3%), and political empowerment (50.4%).

Iceland, for the 12th time, is ranked the most gender-equal country in the world, and scores significantly higher than Ireland in both economic participation and opportunity, and political empowerment for women.

Where the genders differ:

Women attach much more importance to enforcing gender equality than men. Women differ from men in their views about where most progress is needed.

Perhaps unsurprisingly, women attach much **more importance to enforcing gender equality** at 77%, compared to men at 56%, a difference of 21%.



From a behavioural science perspective, we know that, even when gender equality legislation is in place, it is usually not enough on its own to deliver equality. Attitudes and day-to-day behaviours give us a clearer picture of the true extent of gender equality in society. Our research looked at three areas: work life, media and advertising, and home life.

Women feel more strongly than men on the lack of gender equality at work.

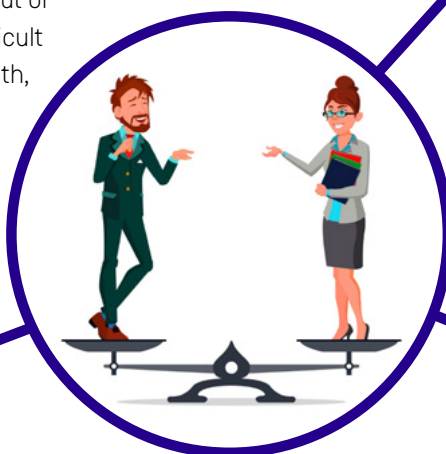
Women’s views on gender equality are strongest when it comes to working life, and it is here where we see the greatest divergence from men’s views. Almost 3 in every 4 women (72%) feel women have to work harder than men to achieve the same level of success in their career, compared to 46% of men, a gap of 25%.



A similar proportion of women (74%) feel the gender pay gap still needs to be resolved in many areas of the Irish economy, compared to 49% of men, a gap of 25%. Almost 7 out of every 10 women (67%) feel it’s more difficult for women than men to have a career path, compared to 47% of men, a gap of 20%. A similar proportion of women (71%) feel there are clear benefits to having gender equality in the workplace, compared to 56% of men, a gap of 15%.

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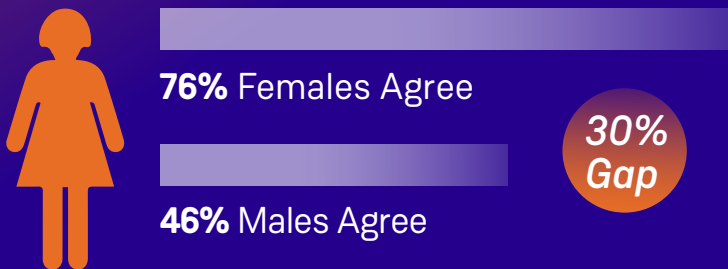
71%

of women feel there are clear benefits to having gender equality in the workplace

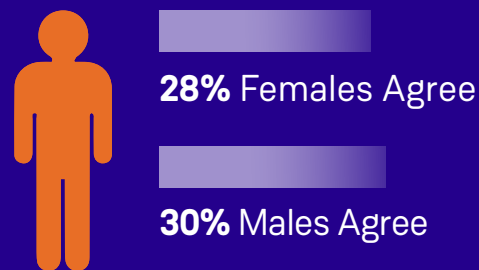
Women are unhappy about how they are portrayed in media and advertising, men less so.

Three quarters of women (76%) feel women get a raw deal when it comes to body image, but less than half of men agree (46%). At 30%, this is the widest gap between the views of men and women. In contrast, just under a third of respondents agree that men get a raw deal in terms of body image, and there is little divergence between men and women (28% of women, 30% of men).

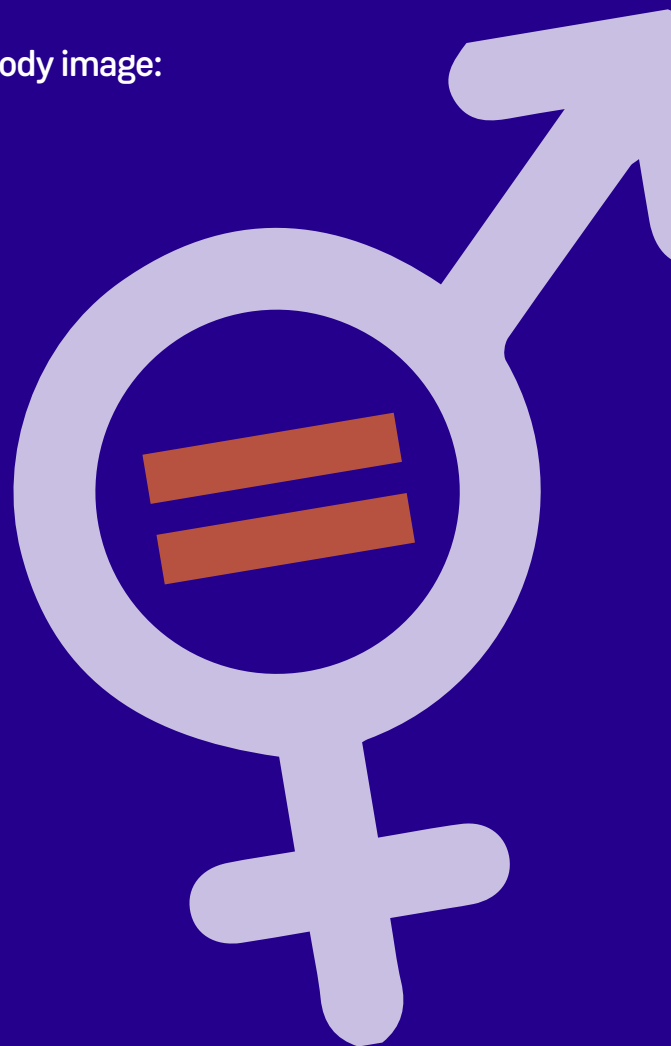
Women feel they get a raw deal when it comes to body image:



Men feel they get a raw deal on body image:



Just over 7 out of 10 women (72%) feel women are often stereotyped in advertising, compared to 49% of men, a gap of 23%. Women also feel more strongly than men that children are gender-stereotyped in advertising at 59% vs. 44% for men, a difference of 15%.



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women feel women are stereotyped in advertising compared to 49% of men



In the home, women are doing more of the caring and household chores than men and are struggling to balance work and home life. Women are also more attuned to what they are missing out on as a result.

Half of women (49%) feel they're doing more of the household chores than their partner, compared to 1 in 5 men (20%), a difference of 29%. Over a third of women (37%) feel they're doing more caring for their children than their partner, compared to 15% of men, a difference of 22%. Most women (57%) describe themselves as the primary carer in their household, compared to a third of men (35%). This has implications. Women are more likely than men to feel frustrated about trying to balance work and family (37% vs. 24%), that their career could suffer from trying to juggle work and home life (36% vs. 24%), that the boundaries between work and home life are blurring (34% vs. 28%) and that this leaves them with a sense of being 'always on' (34% vs. 24%).

49%



Half of women feel they're doing more of the household chores than their partner

37% of women feel they're doing more caring for their children than their partner

37%



57%



57% of women describe themselves as the primary carer in their household

37% of women feel frustrated about trying to balance work and family

37%



36%



36% of women feel their career could suffer from trying to juggle work and home life

34% believe that the boundaries between work and home life are blurring

34%



34%

34% of women feel 'always on' as a result of working from home



The Covid pandemic has widened the gender gap.



A narrative emerging from the pandemic internationally is that lockdowns and restrictions have led to women taking on more of the household and caring duties than men, exacerbating gender inequalities that already existed.

Our research points to a similar pattern in Ireland. **Over half of Irish women (53%)** feel that gendered roles have become more 'traditional' as a consequence of the pandemic, with women taking more responsibility for caring in the home than before. Research from the US supports this, revealing that the uncertainty brought about by the pandemic promotes a preference for traditional gender roles. *5

Over 50%
of Irish women believe gender roles have become more 'traditional' as a consequence of the pandemic

There are mixed views when it comes to how best to deal with gender inequality. Women are more in favour of gender quotas than men.

One in every two women feel it's fair to have gender quotas in areas where women are under-represented, including politics and senior management. Only 1 in every 3 men agree. It seems the general principle of gender quotas sits better with women: 46% feel it's fair to have gender quotas in areas where men are under-represented. This falls to 30% among men.

In terms of peer support, one in every two women (53%) believe women don't support other women in the workplace as much as they should, while only 31% of men agree.



Female role models are a source of inspiration for other women.

The power of female role models to inspire others is evident, with 67% of women agreeing that successful women in the public eye inspire them, vs. 39% of men. We know from behavioural science that we are more likely to be influenced by someone we trust and with whom we feel we have something in common. Women are more likely to find successful women in the public eye inspiring than men are.

67% of women agree that successful women in the public eye inspire them.

The Road Ahead

We have travelled far along the road to gender equality in recent years, something of which we're justifiably proud. We also know we're not there yet. The progress we have made should give us confidence that we have the ability to close the gap. While we have more women than ever in the labour market, women find the workplace far from a level playing field. The unequal division of responsibility for caring and household work has led to a 'double shift' of work for many women. The pandemic has made things worse, widening the gender gap in both our work and home lives, but it has also given us a window of opportunity to make things better.

National policy for equality for women and girls in Ireland has as its vision to work towards:

"an Ireland where all women enjoy equality with men and can achieve their full potential, while enjoying a safe and fulfilling life".

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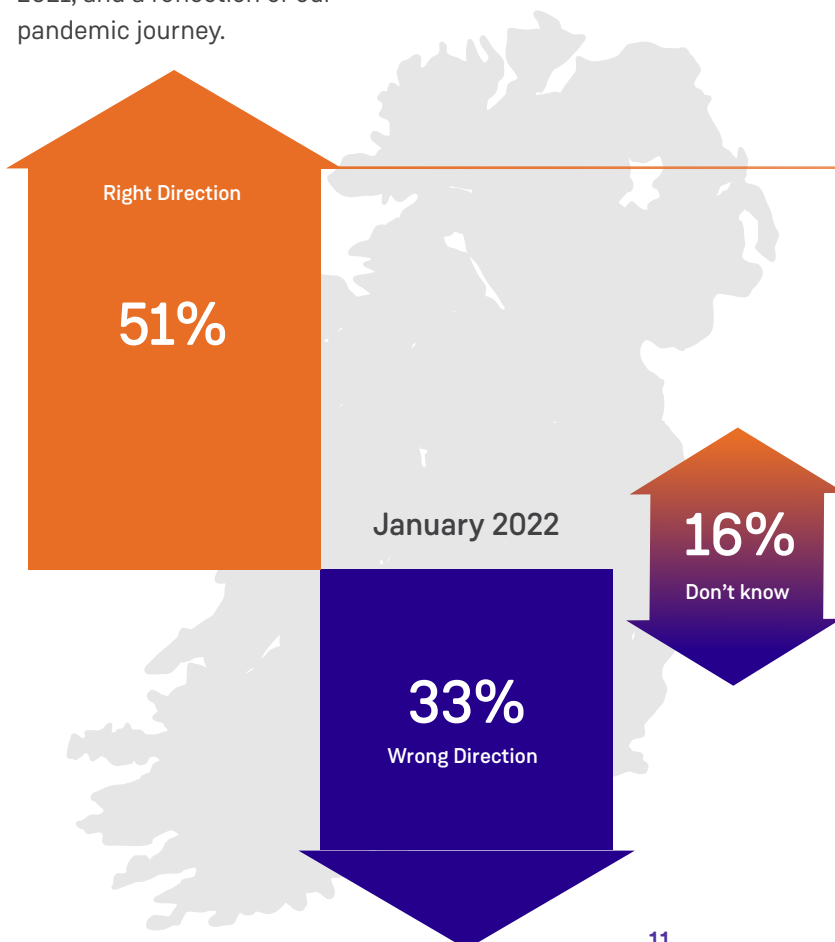
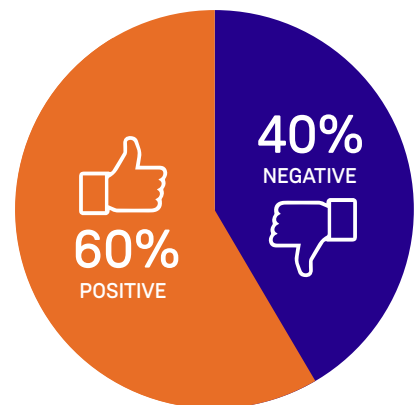
As we redesign our lives after the pandemic, now is the time to intervene for gender equality. We have an opportunity to address the areas that have been holding women back, and to make sure that what works in the new work-life order works for women as well as men. This means applying a gender equality lens to key decisions we make. It means actively listening to women's voices: our research shows that Irish women are very aware of the need for change. It means actively breaking the biases that are making the road to gender equality such a long one.

Macro-Economic Consumer Sentiment

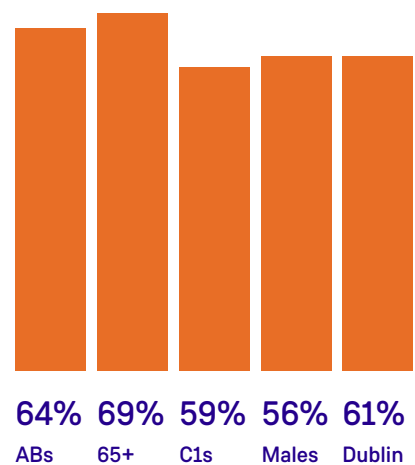
Examining consumer sentiment at a broader level, there's a lot to be positive about. The receding threat of Covid, and subsequent lifting of restrictions, has helped our outlook and in general we feel we are going in the right direction.

With 51% expressing optimism that the country is moving in the right direction, this is the first time a majority has expressed this view since 2018. Likewise, negativity is expressed by just one in three; significantly down since October 2021, and a reflection of our pandemic journey.

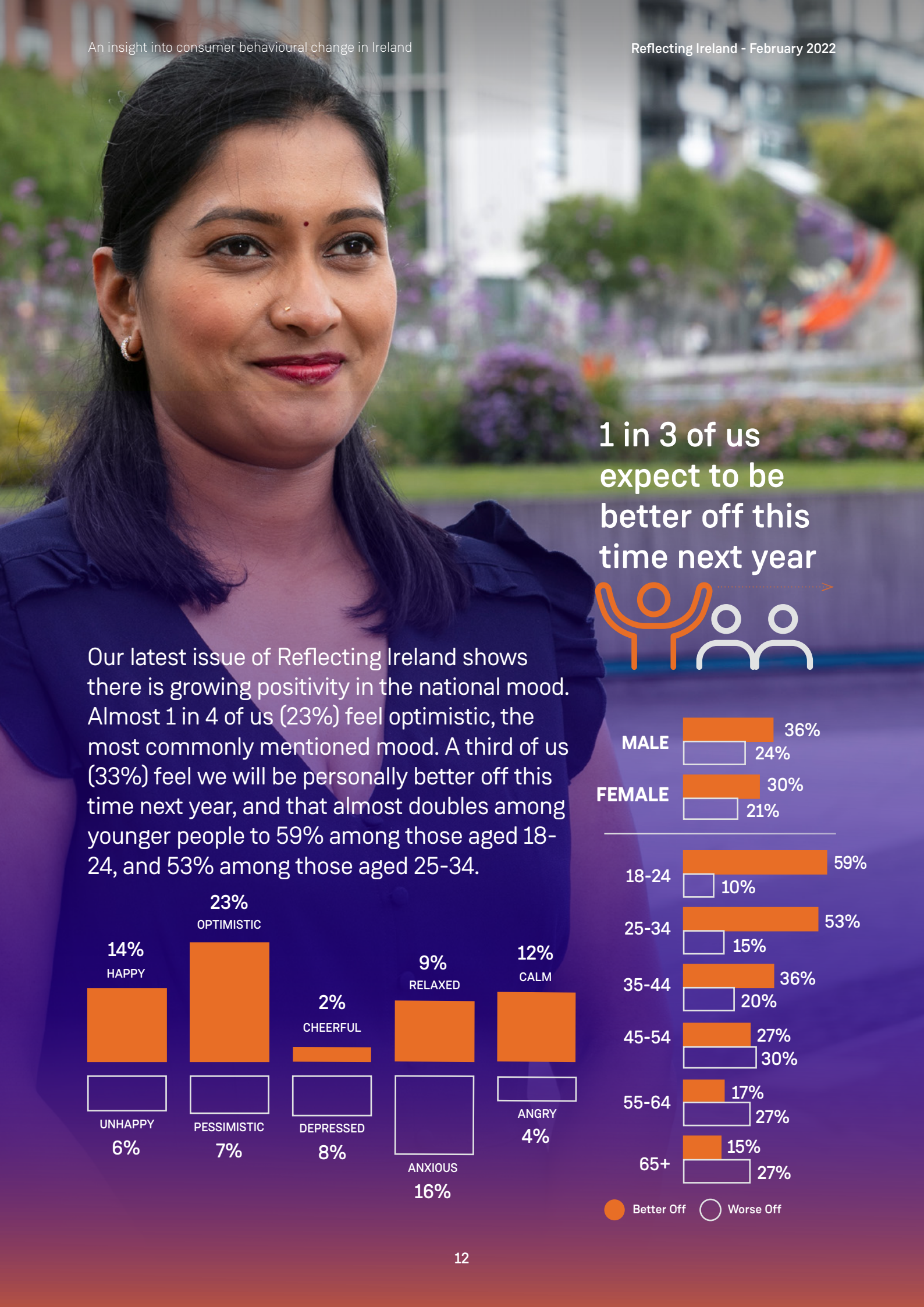
Most of us (60%) are in upbeat mood, up from 50% just three months ago, compared to two in five being more cautious.



Higher Among:



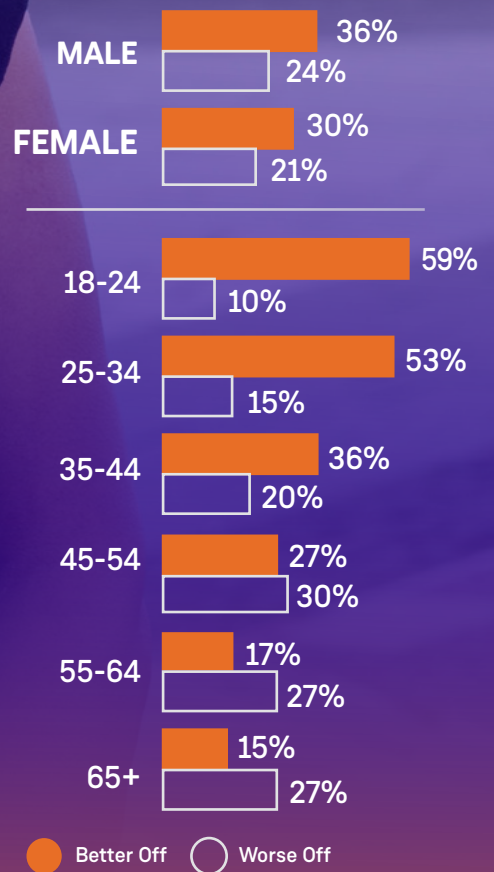
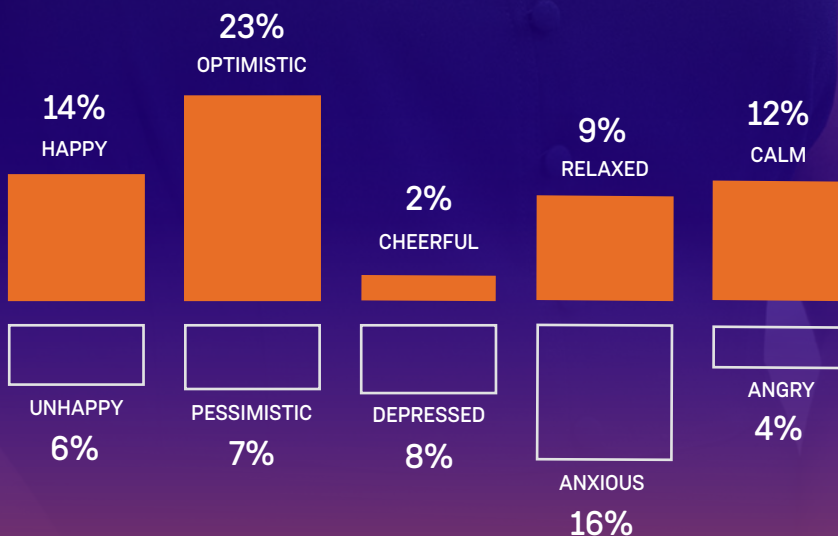
Broadly speaking ABs are defined as Professionals, C1s are White Collar workers, C2s are Skilled Blue Collar workers.



1 in 3 of us expect to be better off this time next year



Our latest issue of Reflecting Ireland shows there is growing positivity in the national mood. Almost 1 in 4 of us (23%) feel optimistic, the most commonly mentioned mood. A third of us (33%) feel we will be personally better off this time next year, and that almost doubles among younger people to 59% among those aged 18-24, and 53% among those aged 25-34.



Reflecting the Nation

Most Pressing Issues for Irish Consumers

In the broader scheme of things, gender equality ranks lowest among the issues affecting the Irish population today. That said, this is against a backdrop of more pressing economic concerns, driven by the cost of living. Other issues come to the fore, such as the price of housing, health care and homelessness.

Most important issues by region relative to Gender Equality.

CONNACHT & ULSTER



- Cost of Living: **66%**
- Access to quality Healthcare: **52%**
- Price of Housing: **47%**
- Affordable Rent: **36%**
- Gender Equality: **7%**

DUBLIN



- Cost of Living: **60%**
- Access to quality Healthcare: **36%**
- Price of Housing: **47%**
- Homelessness: **41%**
- Gender Equality: **9%**

MUNSTER



- Cost of Living: **66%**
- Access to quality Healthcare: **51%**
- Price of Housing: **45%**
- Homelessness: **41%**
- Gender Equality: **6%**

LEINSTER



- Cost of Living: **58%**
- Access to quality Healthcare: **47%**
- Price of Housing: **47%**
- Affordable Rent: **37%**
- Gender Equality: **4%**

Methodology

Permanent TSB and Kantar's Reflecting Ireland research series looks at how consumer behaviour is changing in Ireland.

Our third report focuses on macro-economic consumer sentiment and consumer attitudes towards gender equality.

- Interviews were conducted online among a sample of those aged 18+.
- Quota controls were set on gender, age, social class and region to mirror the 18+ population profile.
- 1001 interviews were conducted in total.
- Interviews were carried out between 17th - 28th January 2022.
- Data weighted to reflect the adult population aged 18+.
- The margin of error for this research is +/- 3.1%.

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5. Rosenfeld, D.L. and Tomiyama, A.J., 2021. Can a pandemic make people more socially conservative? Political ideology, gender roles, and the case of COVID 19. Journal of Applied Social Psychology, 51(4), pp.425-433.
6. <https://www.gov.ie/en/organisation/f1304-gender-equality>