



Reflecting Ireland

Changing Lives

March 2023



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An insight into consumer behavioural change in Ireland

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Executive summary

We have experienced a turbulent few years both globally and at home encompassing the cost-of-living crisis, war in Ukraine, and adjusting to life beyond the pandemic. With this turbulence has come a shift in behaviours, attitudes, values and priorities; some transient, some more lasting.

In this edition of Reflecting Ireland, we look at how we live, work, consume media and socialise has changed. We find that over a third of workers now do so in a hybrid way, half of us are socialising less than before the pandemic, while managing our money has become more difficult overall. We also find that women are currently feeling significantly more anxious than men.

Changing Lifestyles

- 7 in 10 say the way they spend their free time has changed since the pandemic. Females are experiencing the most change in this regard, 32% of females versus 23% of males say the way they spend their leisure time has changed a lot.
- Some positive lifestyle choices have become easier to make in the period since the pandemic. 43% say it has become easier to exercise and 41% to cook from scratch.
- Conversely, implementing financial practices such as controlling utility bills (63%), saving money (61%) and managing finances (52%) have all become harder.
- Women are significantly more likely than males to strive to improve their quality of life (64% vs 58%), mental health (67% vs 53%) and physical health (63% vs 54%)
- Half of us socialise less since the pandemic, with associated costs (57%) and habit (46%) being the biggest contributors to this decline.

Working Lives

- Over a third (36%) of workers can work remotely (either fully or hybrid) while 62% work exclusively from their workplace.
- The most sought-after benefit for workers is flexitime (54%), with half saying it is offered by their employer. 41% say hybrid working is important, with 39% saying it is available to them.
- One area where employers are behind is the compressed work week, sought by 48% of us but available to fewer than 1 in 5 (18%).
- 1 in 4 of 18-24 year olds cite the ability to avail of a career break as 'very important' in choosing a job, suggesting that future proofing talent retention will require providing opportunities to explore life outside of work.
- Despite a need for flexibility, workers recognise that there are clear benefits to having a physical workplace with 7 in 10 agreeing that meeting colleagues face-to-face has a positive impact on their mood.
- A third (33%) feel working from home regularly could negatively impact on their chances of promotion, increasing to 40% among those working hybrid, those living in cities (40%) and 18-24 year olds (39%). More men (36%) than women (30%) also agree.

Housing

- Over half of the adult population (53%) say that they own a home while 1 in 3 (33%) are renting. Among those who do not currently own a home, 2 in 3 (66%) say that the prospect has become less achievable since the pandemic.
- 16% of the population report that they are currently in the market (either casually or actively) to buy a home with first-time buyers making up the majority of home-seekers (57% of those in the market).
- Energy efficiency has become a more considered option in recent years, with 4 in 10 (39%) stating that they would be more likely to purchase an energy efficient home and 30% more likely to consider retrofitting.

A global shock provides an opportunity to reflect

The Covid pandemic gave us the opportunity to take a step back from our usual routines and reflect on how we wanted to live our lives. There was much discussion at the time about what lifestyle changes would transpire as a result. No sooner had the pandemic receded than the effects of the war in Ukraine and rising inflation began to impact our lives, and that impact is still being felt.

Throughout this issue of Reflecting Ireland, we see how the sands are shifting as we evaluate our priorities and consider the best course of action for ourselves and our families. Ultimately, what we find is a people changed.



6 in 10

still do their work completely on-site



1 in 5

are currently looking to buy or rent a property



4 in 10

say they now find it easier to exercise



1 in 2

say they socialise less since the pandemic

The Three Cs

Fundamental to our psychological wellbeing is the ‘**3 Cs**’, having a sense of **control** over our lives, **connection** with others and a feeling of **capability** (1). These can provide a useful lens to understand the potential impact of the changes that are taking place in Ireland.

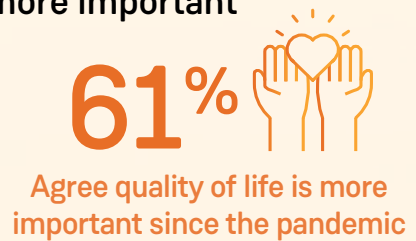


Our priorities have shifted

The pandemic gave us time out of our busy lives to reflect on what's important and most of us feel our priorities have changed as a result. This is particularly the case for women. Overall, it appears we now place more emphasis on our wellbeing, and less on our careers.

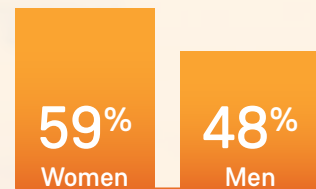
Over half say quality of life and mental health are more important

For 6 out of 10, quality of life (61%), mental health (60%) and physical health (58%) have become more important. For over half of us, managing money (55%) and spending time with friends or family (54%) have become more important. Half of us value being mindful (49%) and getting 'me' time (48%) more than we did before.



Women more likely to have shifted their priorities

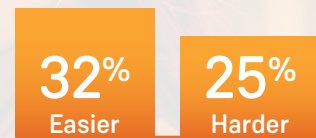
When it comes to reassessing our priorities, women are more likely to have shifted focus since the pandemic. This is seen most strongly with mental health and wellbeing, with 2 in 3 (67%) women saying this has become more important versus just over 1 in 2 (53%) for men. About 6 in 10 women (59%) also say they would like to spend more time with friends and family versus less than 1 in 2 (48%) of men.



More important to spend time with friends and family since the pandemic

Managing work-life balance is twice as important as career

Twice as many said work-life balance has become more important to them (41%) compared to their career (20%). More people (32%) said managing their work-life balance had become easier since the pandemic versus those who said it has become harder (25%).



Has work-life balance become easier or harder to manage since the pandemic?

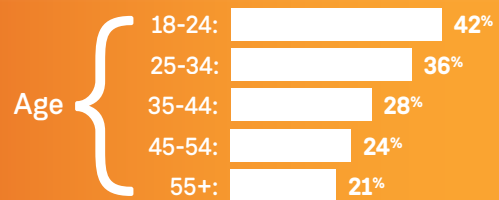
New leisure routines and social habits

Changing Lifestyles

Outside of the workplace, education and our domestic responsibilities, leisure time provides an opportunity for us to relax, connect and explore our personal interests. With the pandemic suddenly restricting our options, our habits and routines changed. Since then, how have we responded?

7 out of 10 say how they spend their free time changed since the pandemic. Women are more likely than men to say it has changed a lot (32% vs. 23% respectively). The pattern also varies by age-group with change more keenly felt by younger people. Twice as many 18-24 year olds say their free time has changed a lot compared to those aged 55+ (42% vs. 21%).

How I spend my leisure time has changed a lot



Social Life

Our social lives have changed significantly since the pandemic with half of us socialising less than before – higher for those aged 25 to 54 – and more of us entertaining at home.

For those that are socialising less, the main barrier is expense (57%), a reflection of the pressure inflation is exerting on so many aspects of our lives. However there is also a sense that we have simply become used to socialising less, with almost half (46%) saying it has become a habit and a third (34%) putting it down to changes in their lifestyle.

One fifth (19%) say they have fewer opportunities to socialise than before, rising to 34% among 18-24 year olds. One in 10 (10%) say lack of accessible transport is a factor.

Nearly
1 in 2
say socialising
less is habitual

Bringing it Home

Over half of us regularly socialise at home (56%) and more of us (58%) order takeaways to have at home than eat out in restaurants (51%). Socialising at home is more popular than going to the cinema (33%) or to bars or nightclubs (28%).



What's easier and what's harder after the pandemic?

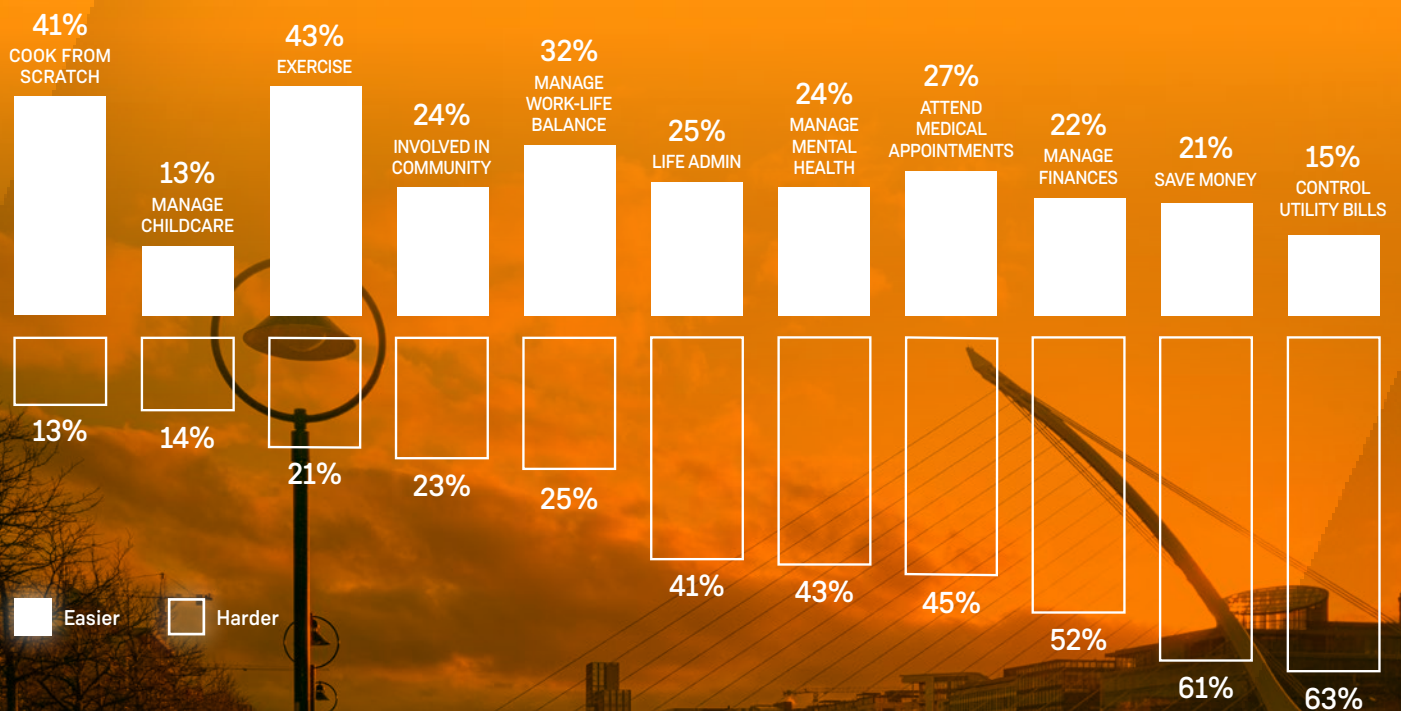
The pandemic required us to make significant changes to how we managed our lives inside and outside of the home. Many of those have since been lasting. Some changes have been positive while others are in more sharply negative territory, particularly managing finances.

The Upside

Over 4 out of 10 (41%) say they find it easier to exercise or cook from scratch, and 3 out of 10 feel they are managing their work-life balance more effectively, particularly those living in cities (42% vs. 32% average). More than 4 in 10 (43%) say it is now easier to get exercise versus 1 in 5 (21%) who say the opposite.

The Downside

No doubt impacted by inflation and the rising cost of living, almost two thirds (63%) say controlling their utility bills is more difficult since the pandemic. Six out of 10 (61%) say it has become harder to save money and over half (52%) say it's more difficult to manage their general finances. Other areas we find more challenging are attending medical appointments (45%) and general life admin (41%).



Move from traditional media to digital continues

Media and technology played a central role during the pandemic by enabling us to stay connected, informed and entertained. Today our media habits vary significantly by age group, whether that's for entertainment or where we go first for breaking news.



Streaming TV or music is as popular as listening to radio

Two out of three (65%) watched a streaming service in the past week and almost as many streamed music (59%), making streaming as popular as listening to radio (65%).



Listening to podcasts is as popular as reading a physical newspaper

Over a quarter (27%) listened to a podcast in the past week, almost as many read a physical newspaper (29%). Those in Dublin are most likely to listen to podcasts.

Over **1 in 4** listened to a podcast in the previous week



Newspapers are 50% more likely to be read online

More read newspapers in online format (43%) than physical (29%), and men are more likely than women to read them in either format.



Just 1 in 10 pay a subscription to a news service

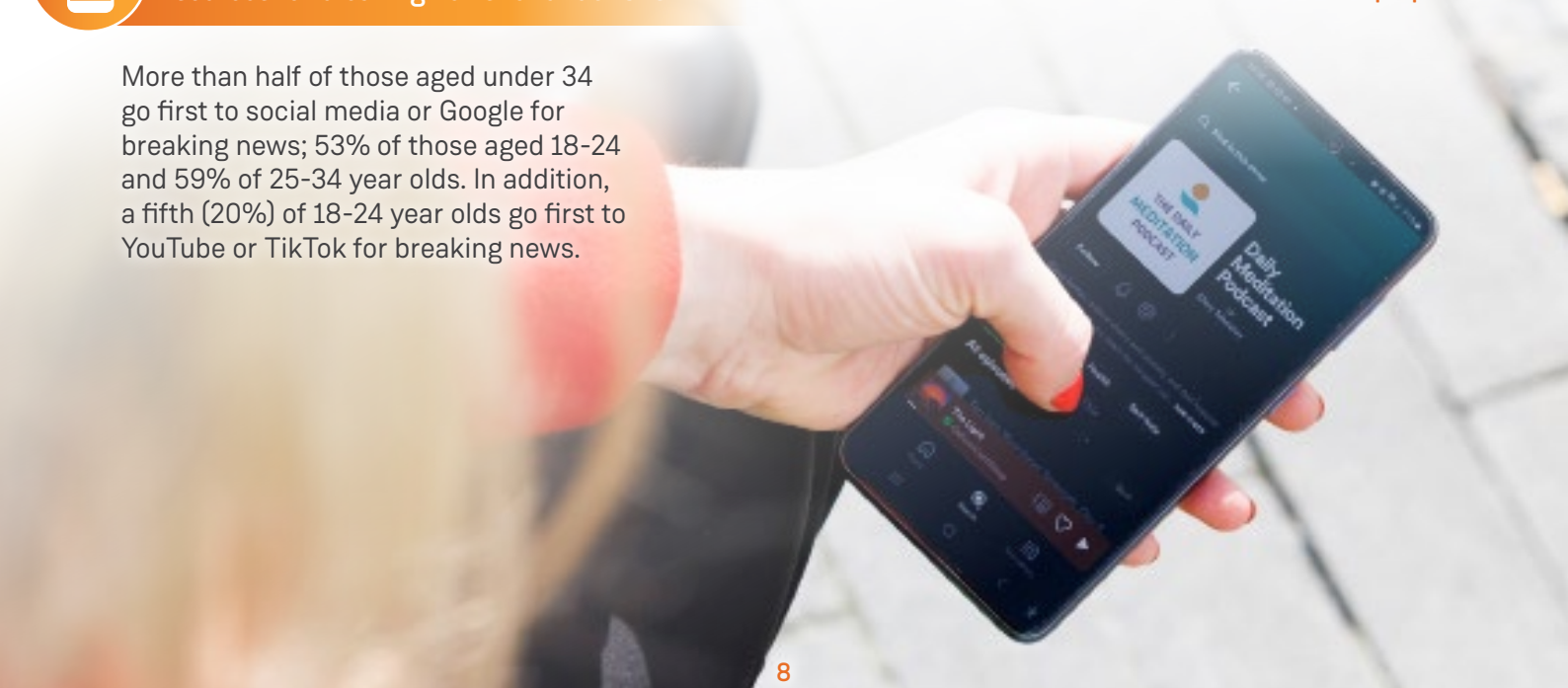
The vast majority (85%) don't pay a subscription to any news service. One in 10 (9%) pay a subscription to an Irish newspaper, half as many to an international newspaper (5%) and a similar proportion (4%) to a premium news content service.

1 in 10 subscribe to an Irish newspaper



Social media and Google are go-to sources for breaking news for under 34s

More than half of those aged under 34 go first to social media or Google for breaking news; 53% of those aged 18-24 and 59% of 25-34 year olds. In addition, a fifth (20%) of 18-24 year olds go first to YouTube or TikTok for breaking news.



Our working lives have transformed

Flexible working in various forms has become more normalised since the pandemic. Workers seek it and employers are expected to offer it. While more workers than ever can choose to work flexibly, many still recognise the social value of the workplace.

Most workers still on-site each day

Over one-third (36%) of workers can work remotely, either fully or hybrid. The majority however work exclusively from their place of work (62%). Just over 1 in 10 (13%) work exclusively from home.



The option of hybrid working has made a real difference to people’s lives, for example enabling them to move location. Hybrid workers are more likely to have moved since the pandemic (28%) compared to 16% of others.

A third (33%) work 5km or less from home, just over half (53%) work within 10km and three quarters (74%) live within 25km. Sixteen per cent travel distances of over 26km to work

We appreciate the social benefits of the workplace

As hybrid and remote working become normalised, we can clearly see the impact on our lives. Seven out of 10 workers (71%) feel the workplace provides a good opportunity to socialise, rising to 77% among 18-24 year olds and those working hybrid (76%). Only 1 in 10 (11%) disagree.

A similar proportion (72%) feel meeting colleagues face to face has a positive impact on their mood, rising to 81% among 18-24 year olds. Those based at their workplace are more likely to agree (76%). Less than 1 in 10 (8%) disagree.

A penalty for working from home?

A third (33%) feel working from home regularly could negatively impact on their chances of promotion, increasing to 40% among those working hybrid, those living in cities (40%) and 18-24 year olds (39%). However a sizable proportion (20%) disagree. More men (36%) than women (30%) also agree.

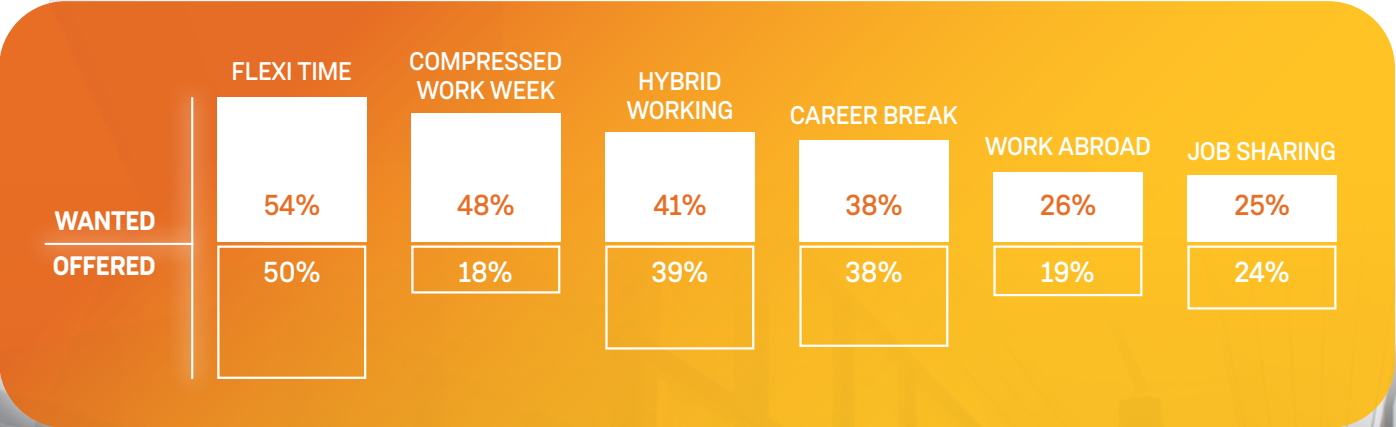
What do we want from the workplace?

In the competition for talent, how well do the benefits that employees want from an employer stack up against what is on offer? It appears quite well in fact.

The most desirable flexible working options

Over half of workers (54%) say it is important to them to have the option of flexitime. Employers have responded in kind, with 50% of the workforce saying it is available to them.

Employers are also responding to demand when it comes to hybrid working, career breaks and job sharing. Four out of 10 workers (41%) say hybrid working is important to them, a similar number (39%) say it is available. The option of a career break is equally favoured (38%) and offered (38%), with younger adults viewing this as a particularly important consideration (52% of 18-24-year-olds).



Early days for the compressed work week

One area of divergence is the compressed work week – the idea of doing the same amount of work for the same pay in less time. While almost half of workers (48%) feel the option of a compressed week would be an important consideration in their career choice, it is only available to 18%.



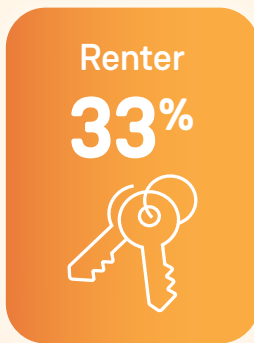
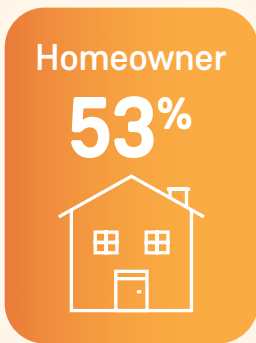
The concept is gaining traction with Belgium becoming the first EU country to introduce it as an option for public and private sector workers in November 2022 (2). Companies in Ireland have started to trial this concept, so we can anticipate more employers will offer the option of a compressed working week in future.

The issue of housing

Housing has consistently rated as one of the top issues of concern for people throughout our Reflecting Ireland series. Here we look at ownership versus rental, our aspirations for the future, and how we're now more likely to consider retrofitting or purchasing an energy-efficient home.

More than half of Irish adults own their own home

Over half of those surveyed (53%) said they own their own home, a third rent (33%) and 1 in 10 (10%) are living with their parents. Over half (52%) say home ownership has become more important to them in recent years, rising to 69% among 25-34 year olds, the age group most likely to be looking for a new home.



Home ownership feels more distant for many

Of those who don't own a home (47%), 8 out of 10 (81%) say it is personally important to them to do so in the future. However, two thirds (66%) feel the prospect has become less achievable in recent years. For over half (55%) the main barrier is financial; this rises to 76% among 25-34 year olds. Financial barriers include struggling to save a deposit (27%), not being able to find a suitable property within budget (19%) and worry about the financial risk (9%).

Younger adults twice as likely to be on the lookout

Across the adult population 1 in 5 (21%) are currently looking for a property to buy or rent, rising to 40% among 25-34 year olds. Most of those looking for a property want to buy (16%); three times the proportion which are looking to rent (5%). Of those looking for a place to buy, over half (57%) are first time buyers and a further third are either trading up (22%) or trading down (13%). Only 4% want to buy to let.



The issue of housing *(continued)*

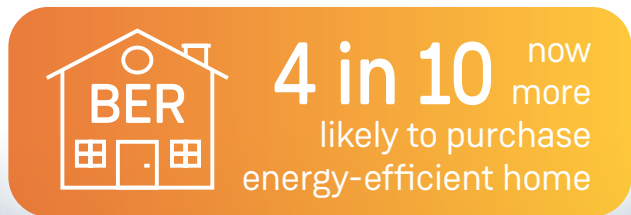
Despite the current challenges of buying a property, long-term rental holds little appeal.

Four in ten (41%) say they would never consider long-term rental. Of those that would, 13% say recent years have made them less likely than before to consider it. This rises to 20% among 25-34 year olds.



The energy efficiency of our homes has become more important in recent years.

Energy efficiency has become more important in recent years, with almost a third of the population (30%) saying they are more likely than before to consider retrofitting their home, and 4 in 10 (39%) saying they would be more likely than before to purchase an energy-efficient home.



How we feel Ireland is doing

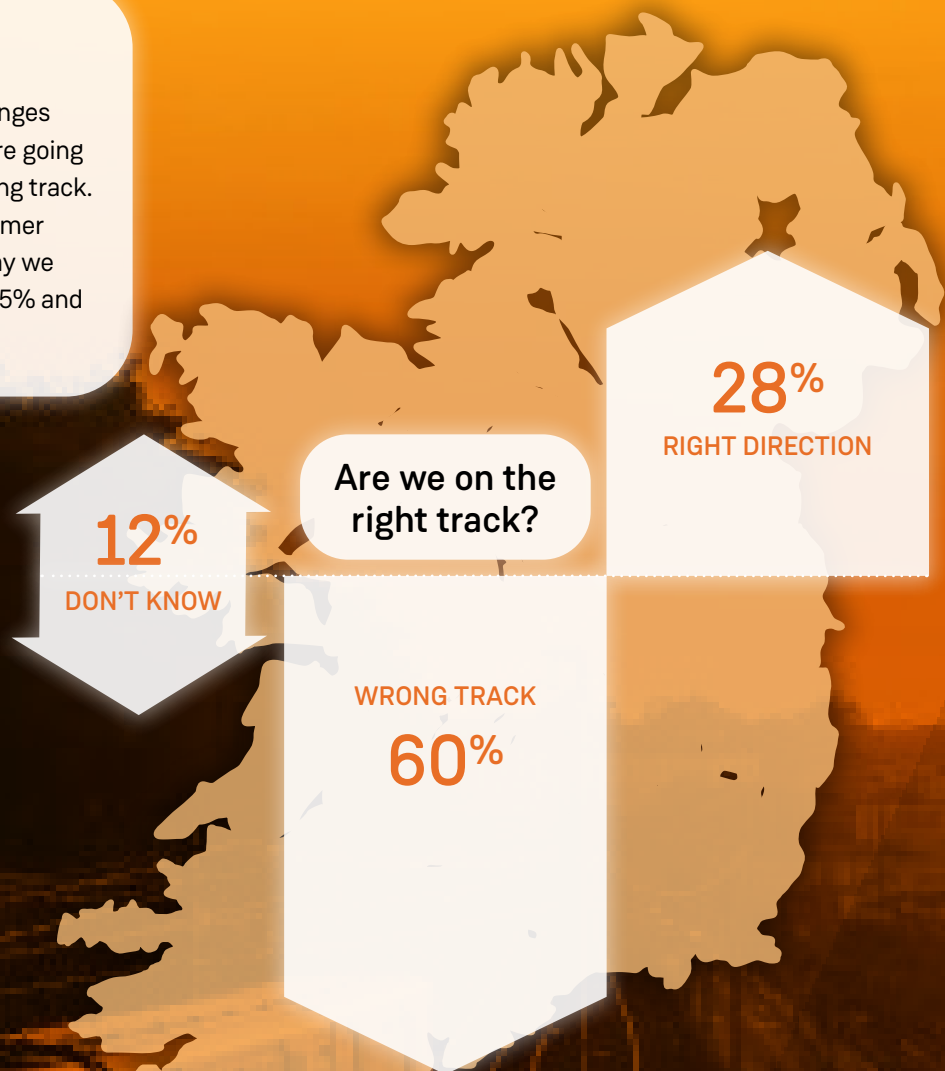
Rise in those expecting economy to improve

The number of people who believe the national economic situation will improve over the next 12 months has increased significantly from November last year. Now, 17% of people support that view compared to 11% only a few months ago. People remain cautious, as half (49%) say they expect Ireland's economy will get worse over the coming 12 months.



Direction of travel

We have seen more moderate changes when asking people whether we are going in the right direction or on the wrong track. Over 1 in 4 of us (28%) take the former perspective, while 6 in 10 (60%) say we are off course. That compares to 25% and 62% in November, respectively.



How we assess our personal finances

Our view today

Many of us have taken a hit to our pockets following the events of recent years. Thankfully, the number of people who feel worse off today compared to 12 months ago is coming down, though this number remains high. 56% of us now feel that way versus 63% towards the end of last year. Those who say they are better off has risen since November 2022, from 11% to 15%. However, this is still below levels seen in early 2022.

Better off compared to twelve months ago

11%

November 2022

vs

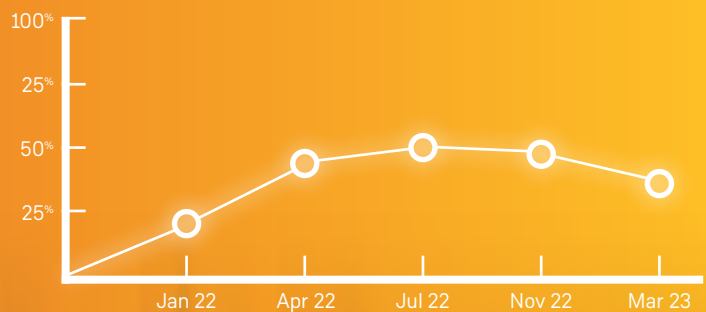
March 2023

15%

Looking ahead

Our more positive view today is also reflected in our personal financial forecast. Perhaps driven by some easing concerns about the cost of living and having come through the Christmas period, the number of people who expect to be worse off in 12 months has dropped from 47% in November to 38% now. Those who say it will remain the same stands at 32% while 22% expect to be better off.

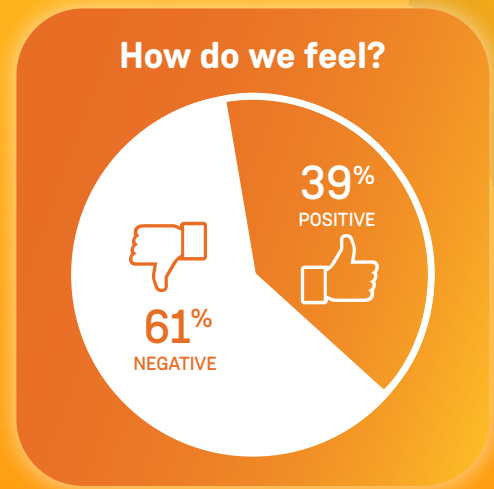
Expect to be worse off in 12 months



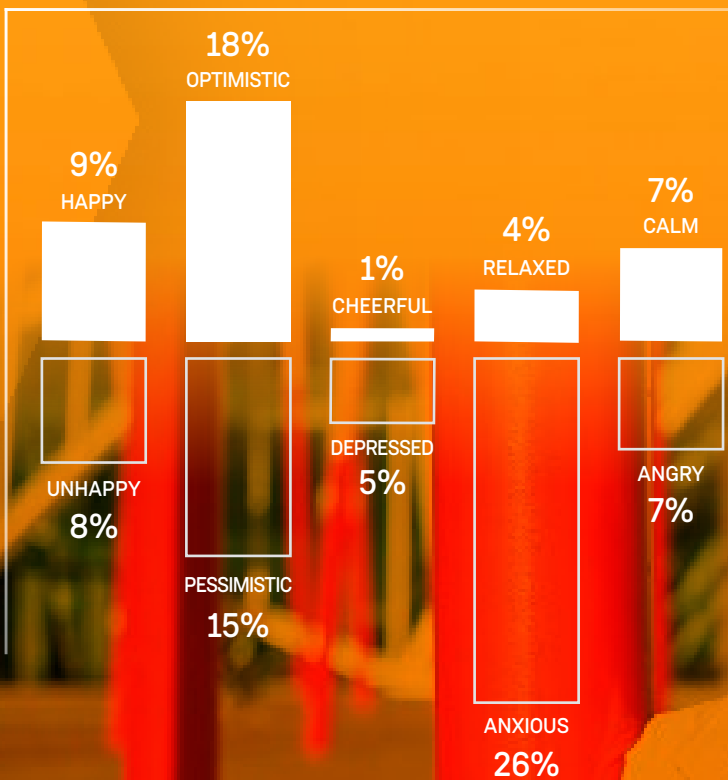
Our feelings about living in Ireland

We've seen a rise in the number of people who say they are feeling optimistic about living in Ireland nowadays. Nearly 1 in 5 (18%) say this compared to 15% who feel pessimistic. That may seem like a small number in isolation but represents a notable increase from 12% who felt the same way in November 2022.

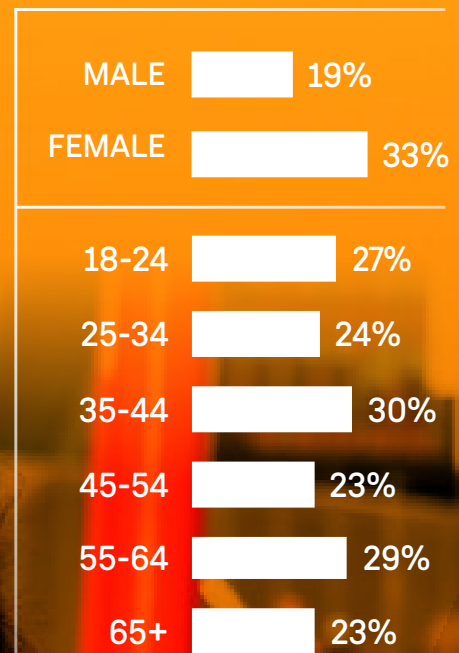
Overall, negative emotions still dominate with anxiety again the most reported feeling. Over 1 in 4 of us (26%) feel this way versus 4% who feel relaxed. Women are significantly more likely to feel anxious with 1 in 3 women (33%) reporting this feeling versus 1 in 5 men (19%).



Nation's Emotions



Nation's Anxiety



Reflecting the Nation

A regional look at how we work and consume media

Taking a look at regional differences, Dublin is an outlier when it comes to hybrid working with exactly half (50%) of those in Dublin having the opportunity to work this way. That drops to around of 33% for those in Munster, Connacht and Ulster. For media habits, almost 9 in 10 (87%) of those in Munster have watched TV in the last week compared to 3 in 4 (76%) of those in Dublin.

Dublin



Work:

Flexitime: **56%**
 Hybrid: **50%**

Media:

Watched TV: **76%**
 Streamed music: **63%**

Rest of Leinster



Work:

Flexitime: **52%**
 Hybrid: **38%**

Media:

Watched TV: **83%**
 Streamed music: **55%**

Connacht & Ulster



Work:

Flexitime: **35%**
 Hybrid: **32%**

Media:

Watched TV: **80%**
 Streamed music: **57%**

Munster



Work:

Flexitime: **50%**
 Hybrid: **33%**

Media:

Watched TV: **87%**
 Streamed music: **60%**

*Watched TV/streamed music = past week
 *Flexitime/hybrid = available always/sometimes

Getting the balance right

In this Reflecting Ireland report, we've again teamed up with Claire Cogan of BehaviourWise to help us interpret the data. As a behavioural scientist, her analysis takes a deeper look at the motivations and behaviours that can explain what we find.

Over half say quality of life and mental health are more important

The experience of recent years has convinced us to prioritise quality of life and our mental and physical wellbeing. We have made significant positive changes to our lifestyles as a result.

However managing change to the benefit of our wellbeing is proving more difficult than we might have anticipated. While a quarter of us (24%) feel that it has become easier to manage our mental health, nearly twice as many (43%) feel it has become harder, particularly women (51%) and those aged under 45 (50%). Anxiety remains high, reported by over 1 in 4 (26%), more than twice the level seen before the pandemic (3).

There are three basic psychological needs that are fundamental to our wellbeing: a sense of control over our lives, connection with others and feeling capable in what we do (1). The opportunity to choose how we work, whether that's remotely, hybrid or at the workplace, increases our sense of control. So too does technology which enables us to work, communicate or entertain ourselves wherever and whenever we want.

However we are learning that technology is a poor replacement for the depth of connection we experience in person. Over 7 out of 10 workers feel meeting colleagues face to face has a positive impact on their mood, rising to 81% among 18-24 year olds. Since the pandemic, half of us socialise less and almost 1 in 5 (18%) are spending more 'alone' time. Habits formed during the pandemic may play a role in this. Habit is the reason given by almost half of those that are socialising less, followed by lifestyle changes and the fact that it is too much hassle.

We may have become used to seeing less of each other in person, a habit we need to break. Connecting in person is vital to our wellbeing. While we have made many improvements to our lifestyles, we may not yet have found the balance between what we feel would benefit our wellbeing and what actually does.



Methodology

In our eighth edition of **Reflecting Ireland**, we look at how key areas are changing for people in Ireland including our social lives, working lives, media habits and living situation.

References

1. Ryan, R.M. and Deci, E.L., 2000. Self-determination theory and the facilitation of intrinsic motivation, social development, and well-being. *American psychologist*, 55(1), p.68.
2. <https://www.euronews.com/next/2022/11/21/workers-in-belgium-can-now-switch-to-a-four-day-week-but-they-wont-be-working-fewer-hours>
3. Anxiety levels pre-pandemic 2017 to 2019 based on Kantar research

- 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.
- 1,000 interviews were conducted in total
- Interviews were carried out between February 27th – March 14th.
- Data weighted to reflect the adult population aged 18+.
- The margin of error for this research is +/- 3.1%.

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