

Ireland & Great Britain Cultural Context in 2015



cultural landscapes of both Great Britain and Ireland have profoundly shifted – we have entered ‘The New Realism’

Era of
Indulgence

Recession
Consumer

The New
Realism

Sensibility	Exuberance	Anxiety	Vigilance
Ambition	Trading Up	Economising	Responsibility
Mindset	Bullish	Sober	Resourceful
Passion	Accumulation	Frugality	Prioritisation
Orientation	Self-expression	Self-preservation	Connection

With a bigger boom, and a bigger bust, 'The New Realism' is a more uncharted territory in Ireland



There is little desire to go back to the days of the flashy Celtic Tiger

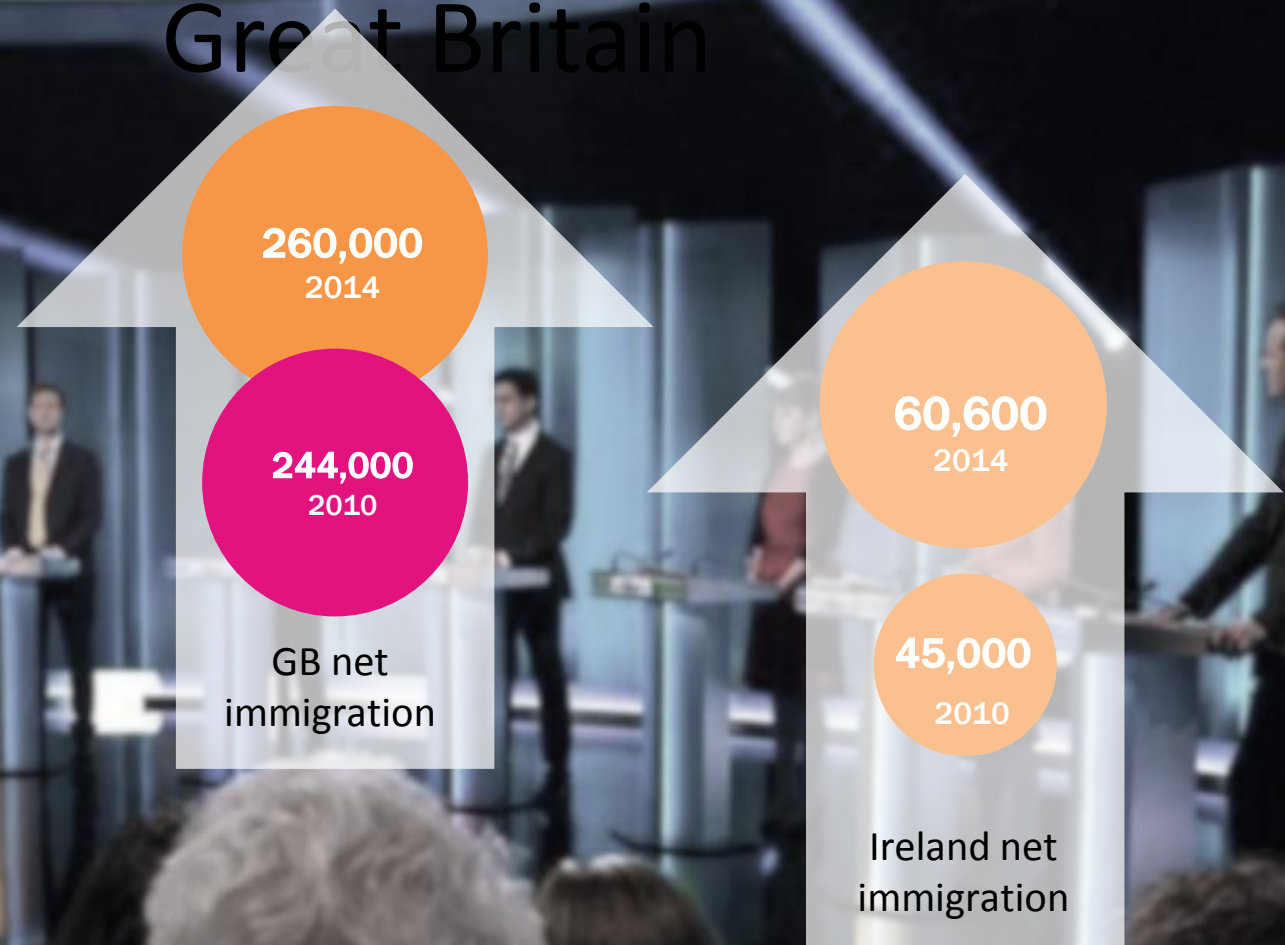


However, there is also a sense that things have changed too much to go back to the 'good old days' of traditional Ireland



'Where are we now?' is a particularly poignant question in Ireland

Population changes and the shifting political landscape are also shaping The New Realism era, especially in Great Britain





How are Irish and British consumers
thinking and feeling in The New Realism
era?

Despite the uncertainty, there is a new atmosphere of optimism and positivity

% saying their country's financial situation is going very/fairly well, UK

20%

2013

40%

2014

% saying their personal financial situation is going very/fairly well, UK

50%

2013

55%

2014



Consumers are happier about their health and their lives generally than

Satisfied with **life**, UK

33%

2013

40%

2014

Satisfied with **emotional wellbeing**, UK

36%

2013

42%

2014

Satisfied with **physical health**, UK

31%

2013

34%

2014



The Irish in particular have been buoyed by the sense of having weathered the storm, and feel ready


“People are **looking on the bright side** and want to move forward – they are resilient”

Irish Fashion and Costume Designer

“It’s not that we’re overly optimistic, because we do like a good moan as a nation, but I think it’s more about **making a joke of the situation**”

Fashion and Costume Designer


This era resonates with some key cultural values in each country, which have come to the fore



“We had lost our way, but [are] now **going back to what [we are] good at** - creativity, humour and optimism“

Irish Fashion and Costume Designer

The Irish have been reminded that they are a **resilient** and **resourceful** people



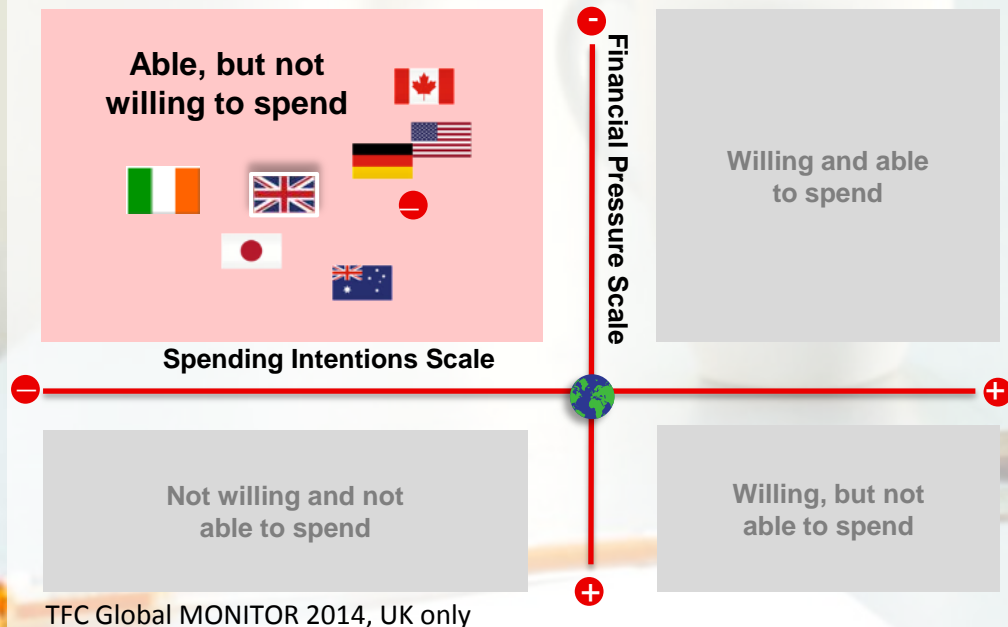
Some of the “things we have always been good at” – including **staying calm** and **not taking one’s self too seriously** – have re-emerged as markers of British identity

Karin, UK streetscaper

Despite their positivity, people are still feeling financially squeezed in both markets

Consumers feel **under less financial pressure** than before, but are still **relatively unwilling to spend**

MATRIX: WILLING / ABLE TO SPEND



£38

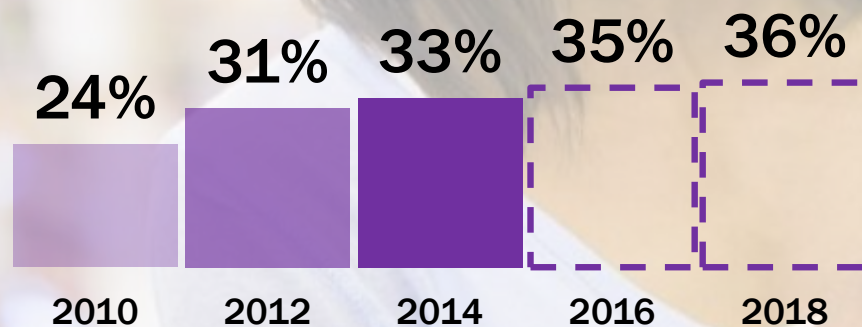
decrease in monthly disposable income per capita in the UK since 2013
[ONS]

€4,000

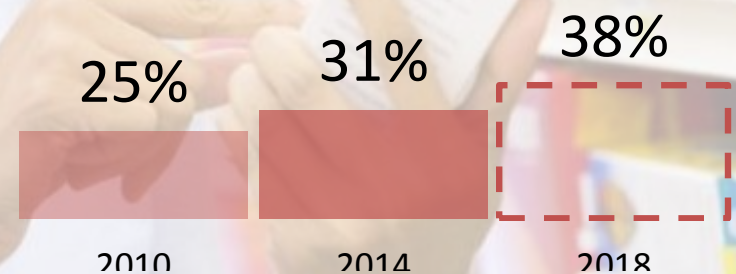
decrease in annual disposable income per capita in Ireland since 2008
[Irish CSO]

Much of the recession mentality has stayed – caution still defines the New Realism era

“Price is more important to me than brand names”
% agree strongly, UK



“I am increasingly likely to spend time researching product before purchasing”
% agree strongly, UK



backlash against the consumerism
and 'bling' spending habits of the

**"It's frowned upon if I
spend a lot of money"**

Irish Cultural Consultant



As institutions continue to disappoint, self-reliance, and reliance on your social networks, remain key coping strategies in the New Realism era

74%

Of Brits agree: "If the opportunity arises, most businesses will take advantage of the public if they feel they are not likely to be found out"

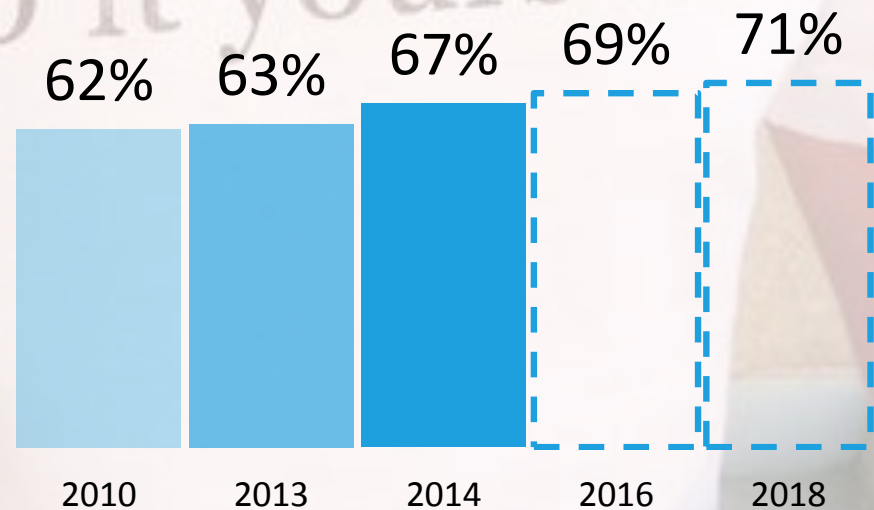
[TFC Global MONITOR 2014]

17%

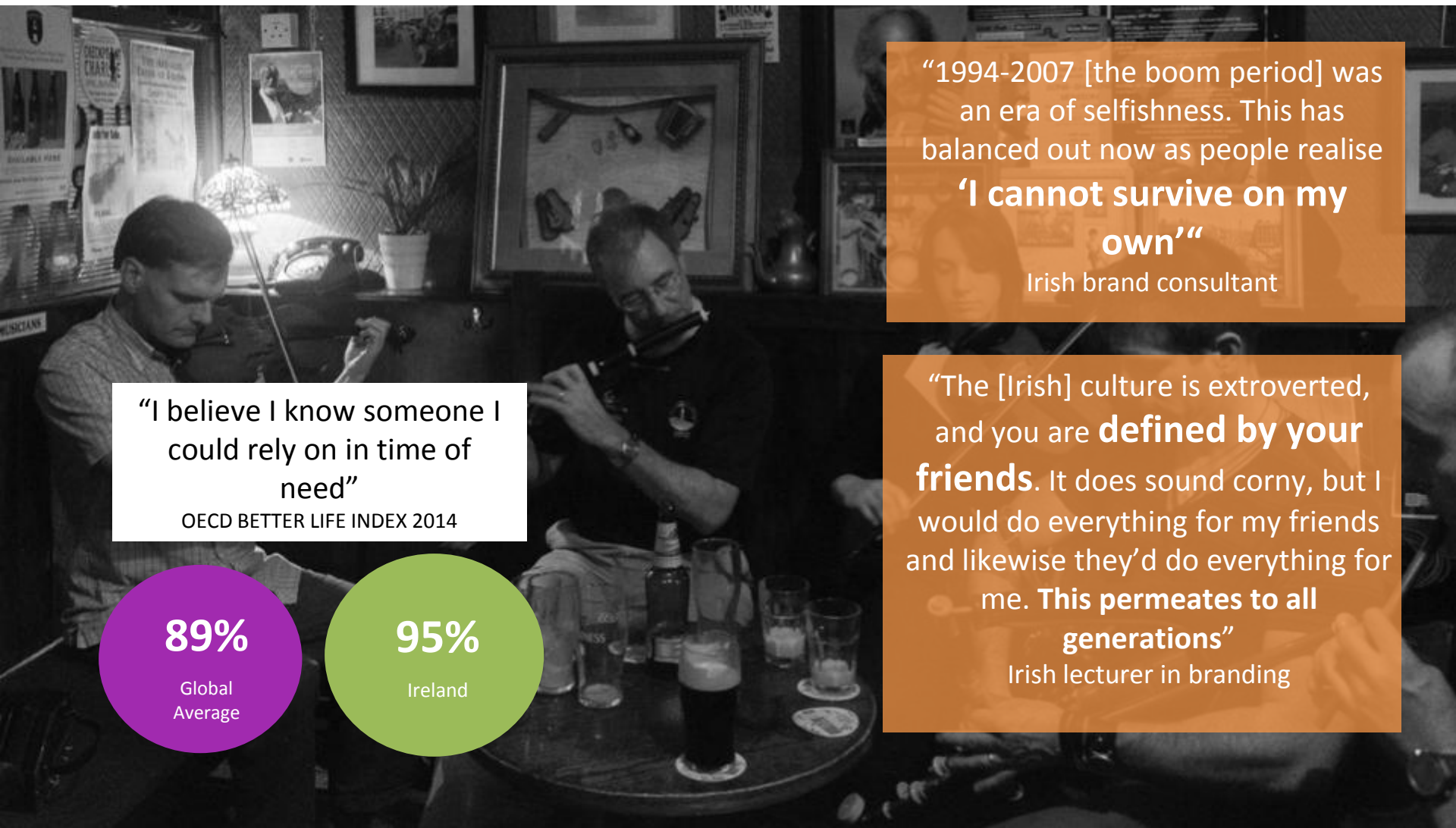
In the UK trust the government most of the time

[BSA, 2014]

Becoming as self-reliant as possible: Will better increase chances of succeeding in today's world (as opposed to seeking the help and guidance of experts)
% agree UK



Core Irish values of kinship and interdependence are once again



“I believe I know someone I could rely on in time of need”

OECD BETTER LIFE INDEX 2014

89%

Global Average

95%

Ireland

“1994-2007 [the boom period] was an era of selfishness. This has balanced out now as people realise
‘I cannot survive on my own’”

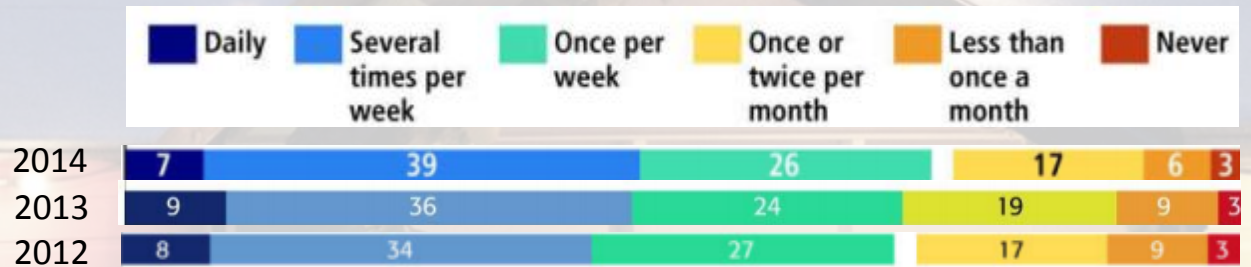
Irish brand consultant

“The [Irish] culture is extroverted, and you are **defined by your friends**. It does sound corny, but I would do everything for my friends and likewise they’d do everything for me. **This permeates to all generations**”

Irish lecturer in branding

While globally connected and aware,
people's energies are increasingly
directed at the local scale in both

Frequency of Consuming Locally Grown Food
(% UK consumers)



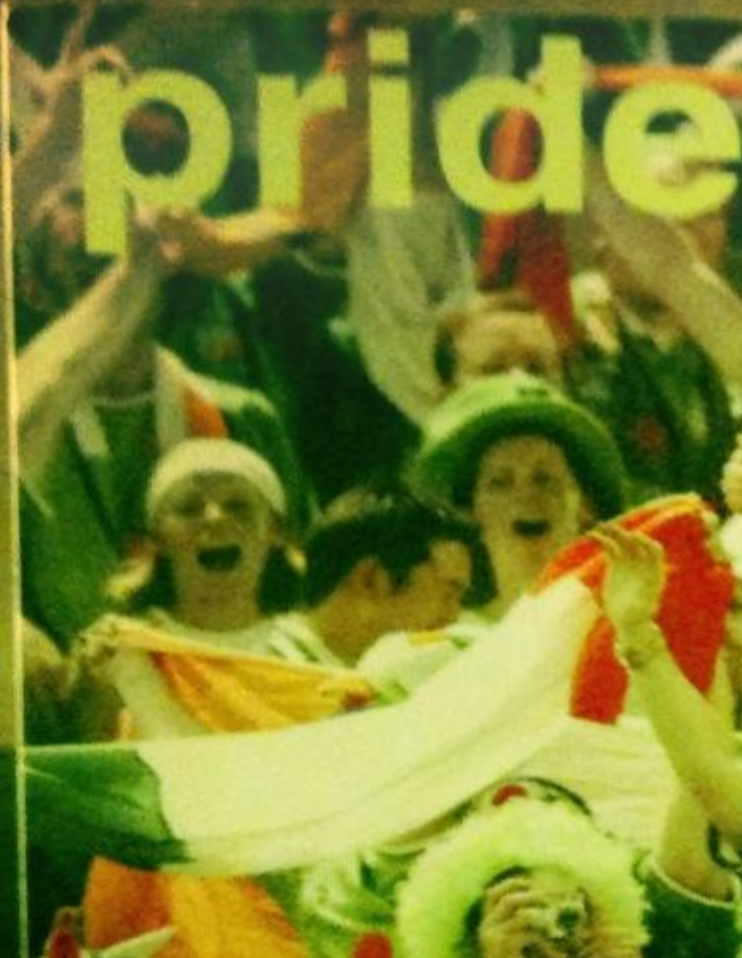
UK Independent
Small Grocers are
worth **£260m**
more today than
they were in 2010

[Euromonitor]

Meanwhile, we are seeing a rebirth in Irish national pride...

“Right now, it almost feels like the **rebirth of Irish** - we are going back to embracing everything that we are good at. There’s a sense of creativity and ability, and humour, and even a bit of optimism – even though we pretend not to be. It feels like **we’re a little bit like Berlin after the wall came down**”

Irish Brand Planner



...and the growing importance of various UK regional and other 'tribal' identities

"I am, and always will be,
proud to be a Hackney
girl"

Singer-songwriter Leona Lewis

An unprecedented
six new UK county
flags were registered
in 2013
[The Flag Institute]



The New Realism is still a work in progress, and people are actively shaping their own futures

Self employment is at a 40 year high in the UK, accounting for **15%** of those employed
[ONS]

15,000
More Irish SMEs now than in 2012
[ISME Association]

“People want to be **agents of change** in Ireland. We’re not open rebels, but we want to align ourselves with **brands and companies that feel progressive**, that feel like they are questioning the status quo, that are adding to us being a smarter, more liberal nation”
Irish Brand Planner