The Future of Ireland
Welcome to our Future of Ireland project, at this, the beginning of an ongoing research initiative from OMD Ireland, in conjunction with our partners, Ulster Bank.

At OMD our philosophy has always been built on Insights, Ideas and Results. Over recent months we have been talking to people across the country looking to understand how they feel about Ireland today and what their hopes, aspirations and concerns are for the future. The Future of Ireland project will help us to understand and interpret the changes that lie ahead.

We are also delighted to introduce photographer David Gerulis, whose work throughout this report beautifully captures Ireland today. You can see more of his work on the Future of Ireland website (www.futureofireland.ie), where we will be publishing more insights, evidence and inspiration to help brands navigate the future of Ireland.

We hope you find our Future of Ireland project as interesting and inspiring as we have, and we look forward to sharing further findings in the months ahead.

Ulster Bank is delighted to be partnering with OMD on the very first Future of Ireland report. Since we were founded 189 years ago, our country has changed enormously, but at Ulster Bank we’ve always aimed to listen to what people want, to support the communities we are part of, and make a real and meaningful contribution to our society. We haven’t always gotten things right - but we listen and learn from mistakes that we make.

Looking ahead, our commitment at Ulster Bank is to provide help for what matters. That’s what the Future of Ireland is about – enabling people from all walks of life to talk about what matters to them and giving them a platform from which their views are shared. It’s an exciting time in Ireland’s future - our country is evolving at a rapid pace – the expectations, needs and desires we have for today and for 10 years’ time are different.

Whether you agree or disagree with the views presented in this report, we hope you’ll enjoy reading it and join the wider conversation about the Future of Ireland.

Foreword

Contents

04. 06. 10. 14. 18. 22. 26.

2016  Hope  Belonging  Family  Change  Happiness  Destiny

© OMD & Amárach Research, the content of this report may be used and republished freely once The Future of Ireland OMD Report is credited.
The Future of Ireland

Methodology

The research strand of the Future of Ireland study was conducted by Amárach Research during July-August 2015. Amárach ran 10 focus groups throughout Ireland comprising a cross-section of the adult population. Participants in the groups completed a diary before attending the groups, designed to capture their hopes and fears about the future, and were encouraged to bring along a ‘symbol’ of the future of Ireland to the groups. Amárach then conducted a nationally representative, online survey of 1,000 adults designed to quantify the main themes and ideas emerging from the focus groups.

This report is different to the usual commentaries about the future. Instead of economic forecasts and predictions about new technologies, we have asked Irish people themselves what they think the future will hold for them personally and for all of us collectively.

What emerges from our survey and from conversations with dozens of people throughout Ireland are a number recurring themes about the future.

We have captured these in this report under the headings of Hope, Belonging, Family, Change, Happiness and Destiny.

But if there is one word that covers all of them it is Control – Irish people want to take ownership of the future rather than passively waiting for it to just happen.

We want this report to be the start of a dialogue about our destiny: the country we are becoming - and the country we could become. A dialogue grounded in the needs, desires and ambitions of our people. Do join us in the Future of Ireland conversation...
Hope

The Hope Gap

Hope looks to the future, often despite the past. These past ten years have been difficult for Ireland as boom gave way to bust. No wonder people are hesitant about the future. Yet they do look ahead hopefully, seeing glimmers of hope in recent changes and trends.

One finding in the Future of Ireland research is that people are more positive about their personal lives than they dare be about the nation as a whole. For example, only 19% of Irish adults in our survey feel that Ireland is a better place now than it was 10 years ago (2005); but 37% say their personal lives are better now than back then, rising to 50% of under 35s.

But what about the future? The "hope gap" is narrowing looking ahead, with 42% of Irish people expecting Ireland to be a better place in 10 years’ time (2025), while 44% expect their own personal lives to be better by then as well. Age differences in outlook about the future are more extreme than about the past. 24% of over 60s expect to be personally worse off by 2025, compared to 2% of under 25s.

"History says, don’t hope
On this side of the grave,
But then, once in a lifetime
The longed-for tidal wave
Of justice can rise up,
And hope and history rhyme.”

Seamus Heaney

44%
Expect to be better off in 2025
“In 2005 the country was going mad with property prices that were clearly unsustainable. Now, while things are difficult, they are much more stable.”

Among the Nations

The vast majority (59%) of Irish people are proud of Ireland’s achievements as an independent nation, and only 13% are not. However, patriotic pride does not translate into economic optimism. Only 26% think it likely that Ireland will have one of the highest standards of living in Europe by 2025. 46% think it unlikely. Of course, the vast majority - 74% - would be happy if we achieved such an outcome.

Prosperity

A major theme throughout the Future of Ireland findings is that people are becoming more ‘self-sufficient’ when it comes to shaping their personal future. There is an emerging sense of responsibility - independent of traditional sources of institutional authority - for what we can become both individually and collectively.

Certainly most people in our survey expect to be better off materially in future (47% expect a higher income level in 2025 and 48% expect to be in a better financial situation). This is partly due to better job prospects (for 33%, though 26% expect their job prospects to be worse in 10 years’ time); but also to better skills levels for 44% of those surveyed.

Overall, and despite the great difficulties Ireland has faced in the past 7-8 years, the Irish remain hopeful, proud of their achievements and optimistic about the future for them and their families.

“...and maybe learn a little bit more.”

Happiness & Prosperity

<table>
<thead>
<tr>
<th>% Expected to be better by 2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your financial situation</td>
</tr>
<tr>
<td>Your income level</td>
</tr>
<tr>
<td>Your skills level</td>
</tr>
<tr>
<td>Your job prospects</td>
</tr>
</tbody>
</table>
Belonging

“A nation is knit together by natural ties, ties mystic and spiritual, and ties human and kindly.”

Padraig Pearse

Solidarity

Did anything good come out of the recession? Some might think it a cruel question when so many are still experiencing the consequences of the economic shock that hit Ireland in 2008/9. But when our survey asked whether ‘Ireland is a better place because the recession taught us the value of family and community’ nearly half (46%) agreed; half as many as disagreed. Women are more likely to agree we’re in a better place than men; while under 25s and over 60s are much more likely to agree than ‘in-between’ age groups.

Another measure of how ‘things could be worse’ is that, all things are considered, the majority (57%) of people would prefer to live in Ireland than anywhere else. Younger people are less adamant about their preference, though they lean much more towards ‘staying’ than ‘going’. Nevertheless, the recent legacy of recession and emigration has left its mark: twice as many disagree that young people are better off staying in Ireland as agree. Oddly enough, there is very little difference by age group.
Looking ahead, a minority (28%) expect that people will become more involved in their local communities and voluntary associations over the next 10 years; though 73% would be happy to see such a trend by 2025, suggesting an ‘expectations gap’ when it comes to the forging of deeper communal and local ties in the decade ahead.

The forging of stronger bonds need not necessarily depend on voluntary and grass roots activities. For example, there is a growing international debate about the introduction of a basic income for all citizens regardless of whether they work or not.

The idea is that it would replace the more byzantine features of social welfare practices, and also recognise that the emergence of artificial intelligence and automation of jobs via digitisation will require fewer employees in the future. While far more Irish people think a basic income is unlikely by 2025 than likely (57% vs 18%), rather more would be happy to see such an outcome than unhappy (48% vs 25%).

One of the major cleavages in Irish society right now is between urban and rural Ireland. Will the differences disappear over the next 10 years? More people think it unlikely (50%) than likely (15%); though here again, considerably more would welcome a narrowing of the differences than not (35% vs 24%).

The other side of that divide is the relationship between Dublin and the rest of the country. The majority (58%) anticipate Dublin becoming less important commercially and politically compared to other Irish cities by 2025; while 37% would be happy to see such a turn of events in ten years’ time (but only 22% of Dubliners would be happy).

If the recession has had such a profound impact on the sense of solidarity in Ireland has it affected the wider perception of national identity? We are certainly more likely to think of ourselves as Irish first and European second, so say 69% of those surveyed. Though older adults are more likely to identify as Irish first, European second, the fact is that even among under 25s the vast majority see themselves as Irish first.

Closer to home, Irish people are more likely to disagree than agree that ‘these days there is little real difference between the Irish and the English’, but the differences are small. 38% disagree vs 34% agree. A similar study asked the same question in 2010 and found that 50% disagreed with the statement. It seems that one effect of the recession (and wider social and cultural changes, including the fact that British citizens make up by far the largest share of foreign nationals in Ireland) may well have been to considerably reduce perceived differences between the British and Irish (except presumably in sporting matters).

Nevertheless, whether due to the recession or not, most Irish people are quite sanguine about our future relations with Europe. Some 40% agree that ‘Ireland will just be a region of a European super state’, only 24% disagree. The recession may have brought us closer together as a people, but it doesn’t necessarily mean that we will continue to experience the same sense of national identity - or differences - into the future.
Family

Family life has undergone profound change in recent generations in Ireland. But what hasn’t changed is the central place of family in people’s lives, priorities and sources of happiness and wellbeing.

The Future of Ireland research points to a recurring theme of continuity and change in the Irish family. Not all change is welcome: only 20% think family life in Ireland is better now than 10 years ago, 35% think it isn’t. Furthermore, only 22% agree that we are looking out for each other more than 10 years ago, 43% disagree. Irish people also see some of the traditional characteristics of family life changing significantly: 60% think marriage will be less important in future.

Nevertheless, people are quite optimistic about the future of their own personal and family lives: 43% expect their family life will be better in 10 years time, only 6% expect it to be worse.

“After a good dinner one can forgive anybody, even one’s own relations.”
Oscar Wilde

The Living Generations

60%
Agree marriage will be less important in future
One of the most interesting aspects of family life in Ireland is that of inter-generational change. The 'generation gap' still exists: 53% have totally different values to those of their parents when they were the same age. At the same time, 43% agree that the different generations in Ireland get on much better than they did before; only 18% disagree. Under 25s agree more than older age groups by the way. Indeed, there is a strong sense of openness between parents, children and grandparents nowadays, perceived by 63% of people in our survey.

Perhaps one of the most impressive indicators of the new 'inter-generational openness' revealed in the Future of Ireland study concerns adults giving advice to their parents. Over a quarter of adults have discussed the long-term future with one or both of their parents, though most haven’t. That doesn’t rule out giving advice to parents of course, and the majority of people in our survey have done so. The most common types of advice given by children to parents are travel (40%) and medical advice (39%), followed by decorating (33%) and financial advice (31%). Some have even advised their parents on relationships (18%) and on living arrangements (15%). Just 12% have advised their parents on retirement.

Perhaps one of the most impressive indicators of the new ‘inter-generational openness’ revealed in the Future of Ireland study concerns adults giving advice to their parents. Over a quarter of adults have discussed the long-term future with one or both of their parents, though most haven’t.

That doesn’t rule out giving advice to parents of course, and the majority of people in our survey have done so. The most common types of advice given by children to parents are travel (40%) and medical advice (39%), followed by decorating (33%) and financial advice (31%). Some have even advised their parents on relationships (18%) and on living arrangements (15%). Just 12% have advised their parents on retirement.

Not Just Friends

Family no longer simply comprises those we are related to. A fascinating theme in our study relates to the role of friends. The majority of people (51%) agree that friends are considered to be family as much as their relatives, only 11% disagree. The number of people agreeing rises to 71% of under 25s.

Irish people are as optimistic about the future of their friendships as their families, with 37% expecting their friendships to be better by 2025 and only 7% expecting them to be worse.

Family Obligations

Despite past changes and those anticipated in the future, the role of family in people’s lives is expected by most to become more important not less. Nearly half (49%) agree that personal relationships and family will become more important to people in the future; only 13% disagree. Women are much more likely than men to expect this trend: 54% agree vs 44% of men.

But if family is going to become more important for most then so also will family obligations and commitments. It is clear from our survey that the vast majority of people think it important for people to discuss issues like finances and health with their families and loved ones. For example, 78% think it important to discuss the care of ageing parents. Indeed, nearly half (45%) of all adults would be happy to see all elderly people cared for by their adult children at home by 2025, though only 21% think it likely to happen.

When it comes to sensitive issues such as wills and inheritance, again the vast majority (74%) of people think it important to discuss the matter with family and loved ones. About the same proportion of adults (3 in 10) expect to inherit property and/or money at some stage in the future: the majority (51%) don’t expect to inherit anything.

One hundred years on from the Proclamation we are perhaps for the first time open to not only ‘cherishing all the children of the nation equally’ but also to cherishing all the generations equally as well.
We have gotten used to change in Ireland. Even to a changing sense of what it means to be Irish. Though not everyone welcomes change of course, nor indeed is all change welcome.

Certainly more people expect ‘the sense of what it means to be Irish’ to be just the same in 2025 as in 2015 than not (43% vs 21%), but at the same time the majority of people agree that the things that make Ireland different from other countries are fast disappearing. Even 41% of under 25s feel that a sense of Irish distinctiveness is being lost.

The Future of Ireland survey reveals some of the sources of this sense of change.

Looking ahead to 2025, just over half think it likely that just a minority of Irish people will be practicing Roman Catholics; though only 22% would be happy about it. Only one in four thinks it likely that Irish culture and identity will be stronger in 2025 than it is now; though nearly three in four would be happy with such an outcome. Just one in ten expects a united Ireland in ten years, though nearly half of all adults would be happy with such an outcome.

“Being certain that they and I
But lived where motley is worn:
All changed, changed utterly:
A terrible beauty is born.”

William Butler Yeats
The experience of immigration in recent decades is also expected to be a source of change in the future. Some 38% expect there to be more Irish citizens speaking Polish by 2025 than speak the Irish language, though the same percentage don’t expect this. But only 8% expect Ireland will have its first Muslim president by 2025, though rather more - 56% - expect us to have our first female Taoiseach by then.

Change Drivers

Demographics will also drive change over the next ten years. One in four expects Ireland’s population to decline due to a falling birth rate, though twice as many don’t. However, at the other end of the age spectrum, over half expect the statutory retirement age to have risen to 75 by 2025, an outcome 70% would be unhappy about.

Emigration has contributed to population change as well in recent years. Though few (21%) think it likely most of those who emigrated during the recession will return by 2025, some 59% would be very happy to see such an outcome.

Population drives household formation and housing demand. One of the most significant shifts in the past ten years has been the emergence of a substantial private rented sector. Nearly half (47%) expect most people will rent rather than buy their homes by 2025, though only 13% would be happy with such an outcome. Indeed there is considerable resistance to the growth of renting in Ireland, only 22% agree that it would be better if more Irish people rented than bought their houses in future; 37% disagree. Even among under 25s, just 19% agree renting rather than buying would be better.

Other social trends expected to shape our future concern crime and policing. Only 1 in 10 adults expects Ireland to have the lowest crime rate in Europe by 2025 (while 84% would welcome it), and only 15% expect the legalisation of prescribed drugs by 2025 (and only 18% would welcome such a change).

Climate and the environment is, of course, one of the biggest change drivers globally. While the vast majority of Irish people doubt that global warming will enable the commercial production of Irish wine by 2025 (though 29% would welcome it), the majority (69%) of Irish people do think it will be more important to use energy from renewable sources in the future.

Technology Futures

No discussion of change in Ireland would be complete without referring to the role of technology. The prospect of free high speed internet access for every household in Ireland by 2025 would be extremely welcome: with 83% saying they would be happy with such an outcome. However, only 31% think it likely.

Half of all adults agree that they will probably spend more online than offline in shops by 2025. Though they can see the consequences of such an outcome: some 53% agree that shops will be less important in the future as people buy more online, with the result that 62% fear that the main streets in Irish towns will struggle to recover because of the recession and online shopping.

The Irish people have lived through huge change in the past ten years. Most expect further change in the next ten years, much of which will be welcome. But it won’t all be, and we can expect more debate about issues such as identity and continuity as well as change in the years - and decades - ahead.
The Proclamation famously declared ‘its resolve to pursue the happiness and prosperity of the whole nation and of all its parts’. While we appear confident about the pursuit of prosperity over the next ten years, what about the pursuit of happiness? The good news from the Future of Ireland survey is that some 42% of Irish people look forward to greater happiness in 2025; and only 12% imagine they will be less happy. Though most expect to remain as happy as they are now.

But happiness and prosperity - or, for that matter, money - are not the same thing. What are the key ingredients of future happiness in Ireland? According to our survey the top choice for the majority of Irish people would be free universal healthcare (for 52%), followed by a better work/life balance (50%) and freedom of choice (49%). Financial security comes sixth in the list at 44%, just after democracy and free universal education joint fifth at 46%.

“True patriotism seeks the welfare of each in the happiness of all.”
James Connolly
Health of the Nation

Health is hugely important to Irish people, both at present and for the foreseeable future. While people are generally optimistic about their economic and relationship prospects, they are much less optimistic about the health of the nation in general and their own health in particular.

Over a fifth (22%) expect their health to be better by 2025, but 29% expect it to be worse. Perhaps not surprisingly, 51% of over 60s expect their health to worsen in the decade ahead. Nor are we confident about the nation’s health prospects.

Only 7% think it likely that no one will be obese any more by 2025 due to better diets and fitness levels. Though 77% would welcome such an outcome.

But while many would welcome free universal healthcare, most don’t intend waiting for it before looking after their own health. Seven in ten people in the Future of Ireland survey agree that they will have to take greater responsibility for their own health and wellbeing in future rather than rely on public health services. An even higher proportion - 75% - of over 60s anticipate taking greater responsibility for their own health.

Older people are very open to new ways of managing their health and medical needs. Indeed, 41% of over 60s have received medical advice from their children on occasion.

Beyond advice, over half (54%) of all Irish adults would be willing to wear technology that monitors their health and fitness in order to pay lower health insurance premiums in future; jumping to 65% of over 60s in our survey.

As Ireland’s population ages over the next ten years (and beyond), we can expect that health and wellbeing (and illness) will have a great weight in the evaluation of Irish happiness and quality of life both personally and collectively.
Destiny

“All the world’s a stage and most of us are desperately unrehearsed.”

Seán O’Casey

August Calling

We are not very good at forecasting the future, either personally or collectively. Nearly two thirds (65%) of us admit that life today is quite different to how we expected it would turn out ten years ago. Only 5% say their life today is exactly as they expected it would be back in 2005. Those aged 25-34 are the most ‘surprised’ (70%) by how their lives have turned out ten years later.

One consequence is that we are quite modest about our ability to predict how our lives will be in 2025. Indeed, some 45% of us expect that life in ten years’ time will be different to life today, with many surprises in store. Though fewer than a third of us are confident about our ability to picture life that far ahead.

Given such uncertainty, and the evidence of the recent past for fate’s fickle ways, many of us look inward for guidance to how we should face the future. Indeed, this is the most significant finding from the Future of Ireland study: we no longer expect others - the Government, the Church or even the Media - to shape our future. We expect to be in control of our own ‘august destiny’. This final section of our report sets out how we might control our future, in face of the vicissitudes of life.

Influencers

Who will influence Ireland’s future? We asked respondents to our survey to look ahead ten years and imagine whether different institutions and organisations will have more, less or the same influence on the daily lives of Irish people as they do now. The results reveal a fascinating ‘influence map’ of who or what is expected to have more influence in future, and less influence.
Given Ireland’s open economy it isn’t perhaps surprising that more than half the population (53%) expect foreign companies to have more influence on our daily lives in future; only 10% expect them to have less influence. However, more interesting perhaps is the expected influence of younger generations: again, half the population (51%) expect them to have more influence, only 9% expect them to have less. These findings contrast to expectations for the influence of older generations: more people expect them to have less influence in future (33%) than more influence (20%). Curiously, both the youngest and oldest age groups in our survey are in broad agreement on outlook for generational influences. This may also be connected to the expected influence of entrepreneurs and immigrants on our lives in 2025 (as they both tend to be younger on average): 45% expect entrepreneurs to have more influence and 48% expect immigrants to have more influence in the future.

While countries like Germany and China are also expected, on balance, to have more influence on our future, indigenous sources of influence — such as the Irish Government — are expected to have less influence on balance (though the majority don’t expect the Government’s influence to change at all). The influence of Irish media — specifically RTE and daily newspapers — is expected to wane over the next ten years. The biggest expected change in influence is for the Catholic Church, with three in four people expecting it will have less influence on the daily lives of Irish people by 2025.

Taking Control

What will Irish people do to prepare for the future? Our survey provides some fascinating clues to our plans and expectations for the next ten years.

For example, over half of us (51%) expect to learn a new skill that will earn us money in the next ten years, including 1 in 5 currently aged 60 and over. Nearly a quarter of adults expect to set up their own business by 2025. Some 30% of all adults expect to live abroad for a year or more in the decade ahead, and 25% expect to work abroad. Indeed, over a third expect to learn another language. Not all movement need necessarily be abroad — a quarter of adults think it likely they’ll move to another part of Ireland over the next ten years.

However, taking control of our futures isn’t all about skills and migration. Two thirds of us expect to make new friends, and a similar proportion expects to take up new hobbies; with 46% planning to become a volunteer in a charity or club (but only 1 in 5 will become more politically involved).

Some will seek a simpler life in future: over 1 in 5 expects to sell up and opt for a simpler life by 2025, reaching 31% of those aged 45-59 in our survey. Though only 1 in 10 expects to explore new beliefs or a new religion. Some, of course, expect to retire in the next 10 years (a quarter of all adults), rising to 52% of those over 60 in our survey.
Be Prepared

The future is ultimately clouded in uncertainty. The key task is to be ready for the future rather than right about it. The good news is that Irish people are mostly prepared for the future in terms of skills and resources. Nearly twice as many people in the Future of Ireland survey feel prepared for the future in terms of their financial resources as feel unprepared (41% vs 23%), and half of us feel prepared in terms of having relevant skills for employment (or self-employment).

Being prepared for technological change is also an important part of preparing for the future. Some 67% of us feel prepared in terms of access to digital technology (only 8% feel unprepared), and 71% feel prepared in terms of their ability to use digital technology (7% feel unprepared, rising to 14% of over 60s).

But future preparedness isn’t all about skills and technology: the majority of people (60%) feel they have a network of friends, relationships and family to prepare them for the future. Similarly 61% know people who can give good advice in relation to future choices and decisions.

Crucially, 53% feel that their overall level of fitness and health leaves them prepared for the future (also true of 50% of over 60s).

A Hopeful Future

Our survey of the Irish people as we mark an important centenary in our nation’s history bodes well for the future. For all the uncertainty and suffering we have witnessed and experienced in the past ten years, the good news is that we expect a better future in the decade ahead.

But we know we won’t achieve the future we want – individually or collectively – without a shared sense of purpose and collective willingness to help one another succeed.

Ní neart go cur le chéile, as the old saying goes. So do join us in the Future of Ireland conversation as together we explore the challenges and opportunities we face in the exciting times that lie ahead.

www.futureofireland.ie

All photographs for the ‘Future of Ireland’ project, by David Gerulis. Photographs were taken in the following locations:

Bull Island, Dublin; Brittas Bay, Wicklow; River Liffey, Lucan; Celbridge, Kildare; The Docklands, Dublin; Wicklow Mountains National Park, Cork City; Dublin City Centre; Dungarvan, Waterford; Glendalough, Wicklow; Cahir, Tipperary; Waterford City