

Your Dublin, Your Voice Arts & Culture Survey August 2018



Executive Report

Survey reference period: August 2018

Delve Research

Survey Research & Analysis

Report by

www.delve-research.com

Agenda

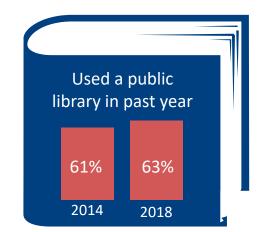
Ι.	Summary of Results	2
11.	Background, Respondent Profile	9
111.	Public Libraries	14
IV.	Perceptions & Impact of Arts & Culture	18
V.	Awareness of Art Galleries	21
VI.	Arts & Culture Participation	24
VII.	Finding Out About Events	26
VIII.	Events and Designations	29
IX.	Engaging with Arts & Culture	33

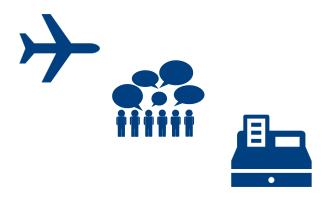
Public Libraries

• Frequency of use of public libraries has remained at similar levels to 2014, against a background of changing use of services.

Perceptions & Impact of Arts & Culture

- Respondents felt that Arts & Culture had the most positive impact on the tourist experience (79% rating this as positive), followed by the impact on social interaction (73%) and local economy (71%).
- The perceived impact of Arts & Culture is lower in August 2018 than was observed in June 2014.







Awareness of Art Galleries

- 88% of respondents could name at least one gallery in Dublin. 81% named the National Gallery of Ireland (unprompted) and 63% named Dublin City Gallery The Hugh Lane (or variation).
- Name recognition for galleries was highest for the National Gallery of Ireland (95%), Irish Museum of Modern Art (88%) and Dublin City Gallery The Hugh Lane (80%).
- Name recognition for most galleries was lower than average among 18 to 34 year olds.
- There is scope for improving unprompted awareness ("top of mind") for several galleries, especially for the Irish Museum of Modern Art.









Arts & Culture Participation

- 35% of respondents engage in some form of artistic or cultural activity as a participant.
- Visual Arts is the most popular participation medium (13% of respondents), followed by creative writing (11%) and playing music in a group or solo (8%).

Finding Out About Events

- Search engine research was the most popular source for information about what events are happening in Dublin. 69% use search engines for this purpose.
- 49% rely on family and friends for information about what events are happening in Dublin.







Events & Designations

 81% of respondents were familiar with Culture Night, similar to 2014 (80%). Awareness of several other events was lower in 2018 than in 2014.

• 37% of respondents attended an event or events on Culture Night 2017. Of these, 46% visited a museum, and 40% visited a gallery or art exhibition.







Engaging with Arts & Culture

- Cinema is the most engaged-with art form in Dublin, with 81% of respondents going to the cinema. 73% go to museums / heritage sites / heritage festivals, and 71% listen to live music.
- Among those who listen to live music, 83% do so at large concerts, 61% do so at the pub, and 53% do so at local paid events.
- The average spend on arts and culture related events is €40.74 per month. Respondents not in employment (including retired and homemakers) were more likely than those in employment to not spend anything on this sector.







€40.74



Best thing about Dublin

- As in 2010, the most common responses to "What is the best thing about Dublin?" related to the people of Dublin referring to friendliness, wit etc.
- Other common "best" aspects of Dublin were "Culture / arts / variety of activities", "Size of the city", and the diverse, cosmopolitan and vibrant character of the city.

What the city could do to improve the cultural offering

- The most common suggestions for how the city could improve the cultural offering related to increasing awareness of events through advertising and promotion.
- Other common suggestions were for more free / cheap events, a safer city, and making the city more generally accessible.







Agenda

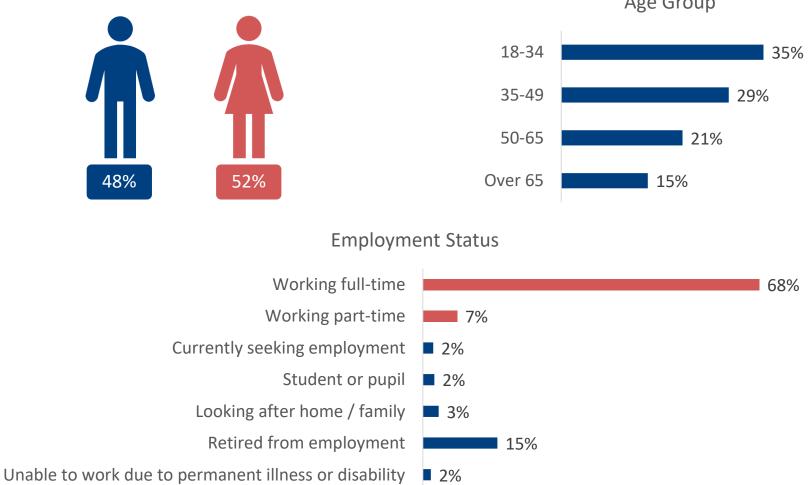
1.	Summary of Results	2
П.	Background, Respondent Profile	9
111.	Public Libraries	14
IV.	Perceptions & Impact of Arts & Culture	18
V.	Awareness of Art Galleries	21
VI.	Arts & Culture Participation	24
VII.	Finding Out About Events	26
VIII.	Events and Designations	29
IX.	Engaging with Arts & Culture	33





- Online survey, 15th August 2nd September 2018
- 1,003 respondents, from "Your Dublin, Your Voice" opinion panel
- 27% response rate
- Global margin of error = +/- 3.1%
- Robust panel in existence since 2010, recruitment through various channels





Age Group

Principal results are statistically adjusted to match census data by gender and age group N=1,003

Other 1%



32 nationalities represented on this survey 89% Irish



Local Authority (Dublin Residents)

Dublin City Council	59%
South Dublin County Council	14%
Fingal County Council	13%
Dun Laoghaire / Rathdown Co. Council	9%
Don't know / not sure	4%

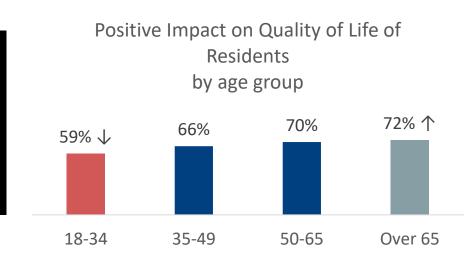
Current Area of Residence

	%	n
County Dublin	11.6%	121
Dublin 1	3.0%	21
Dublin 2	1.3%	14
Dublin 3	3.9%	41
Dublin 4	3.4%	34
Dublin 5	3.9%	37
Dublin 6	5.6%	51
Dublin 6W	2.5%	28
Dublin 7	7.1%	74
Dublin 8	8.9%	84
Dublin 9	6.2%	64
Dublin 10	1.1%	12
Dublin 11	4.4%	54
Dublin 12	5.7%	61
Dublin 13	3.0%	37
Dublin 14	2.2%	22
Dublin 15	5.7%	53
Dublin 16	2.1%	23
Dublin 17	.3%	4
Dublin 18	1.9%	24
Dublin 20	1.6%	19
Dublin 22	1.5%	15
Dublin 24	2.8%	32
Outside County Dublin	10.1%	78



Conventions used throughout this report:

Where charts are used and
there are statistically
significant differences
between categories, arrows
up or down signify
statistically significant
differences above or below
the average for a given
measure



Colour coding

Red text boxes highlight findings which are significantly lower than average

Blue text boxes discuss findings where there is no significant difference from average

Pale blue text boxes highlight findings which are significantly higher than average

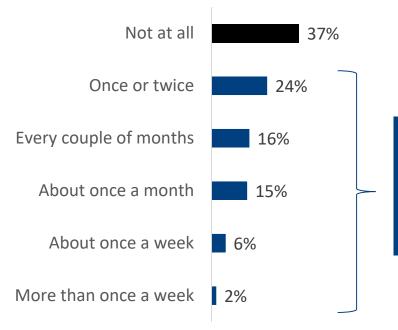
Agenda

Comhairle Cathrach Bhaile Átha Cliath Dublin City Council

1. 11.	Summary of Results Background, Respondent Profile		2 9
111.	Public Libraries		14
IV.	Perceptions & Impact of Arts & Culture	-	18
V.	Awareness of Art Galleries		21
VI.	Arts & Culture Participation		24
VII.	Finding Out About Events		26
VIII.	Events and Designations		29
IX.	Engaging with Arts & Culture	3	33



Q. How often have you used a public library in the past year?



63% had used a public library at least once in the past year 75% of over 65s used a public library at least once in the past year

58% of respondents in employment had used a public library in the past year

77% of respondents who were not in employment had used a public library in the past year

Similar levels of use of Public Libraries in 2018 as in 2014 (61%)

Comhairle Cathrach Bhaile Átha Cliath Dublin City Council

Q. Please describe any reasons you do not use public libraries:

working pass activities live college university available usua needed particular convenient month services busy back habit JOE service area going rea tend studying der swap open book just join still plar know triends enough **CIOSe** free card local las found IKE often St interest meaning years ack staff Dublin re neve aware keep prefer regularly ago find hand charity Rathmines research children always moment currently

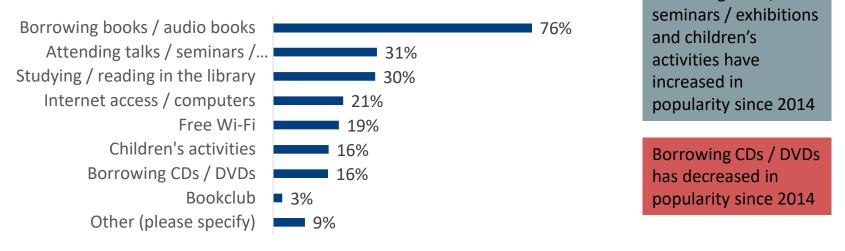
Typical reasons included:

- Prefer to buy books
- Get information needed online
- Read on Kindle or similar device
- Don't read much or not at all
- No (easy) access to library

Comhairle Cathrach Bhaile Átha Cliath Dublin City Council

Attending talks /

Q. Which services do you avail of when using a public library? Please select all that apply.*





Among 18-34 year olds – internet access / computers (31%) and free wifi (34%) are more popular services than among older age groups



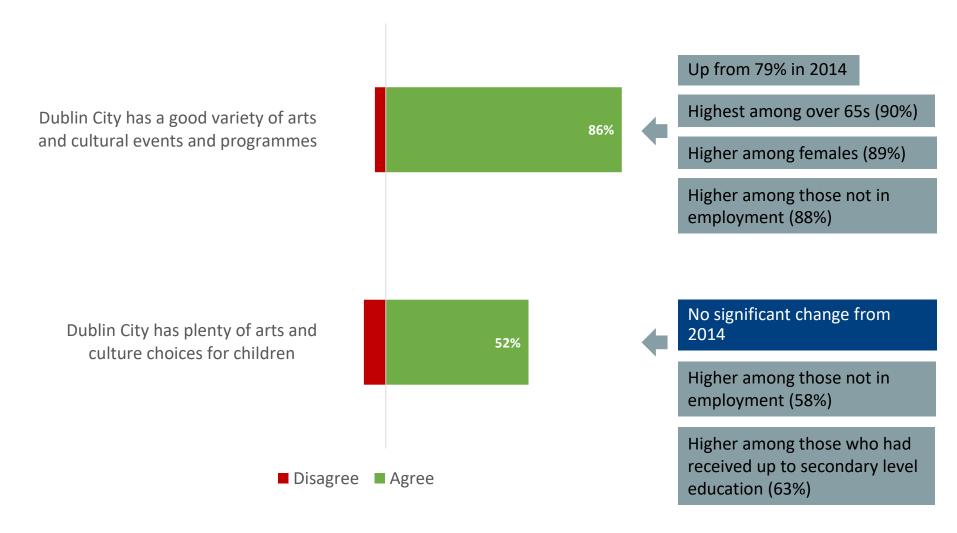
Among 35-49 year olds – children's activities (32%) are more popular than among other age groups

Comhairle Cathrach Agenda Bhaile Átha Cliath **Dublin City Council** 2 Summary of Results Background, Respondent Profile 9 **Public Libraries** 14 Perceptions & Impact of Arts & Culture IV. 18 Awareness of Art Galleries 21 **Arts & Culture Participation** 24 **Finding Out About Events** 26 **Events and Designations** 29 Engaging with Arts & Culture 33

Perceptions of Arts & Culture

Comhairle Cathrach Bhaile Átha Cliath Dublin City Council

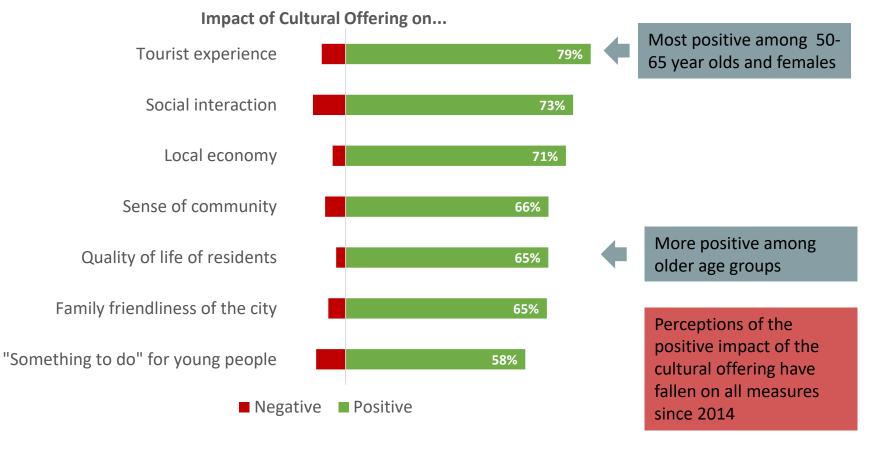
Q. Thinking about arts and culture in Dublin, please indicate your level of agreement with each of the following statements:



Neutral responses excluded, top 2 box percentages

Impact of Arts & Culture

Q. Please rate the impact of the current offering of arts and culture on the following aspects of life in Dublin:



Neutral responses excluded, top 2 box percentages

The relative impacts have remained largely similar

Comhairle Cathrach Bhaile Átha Cliath Dublin City Council

Agenda

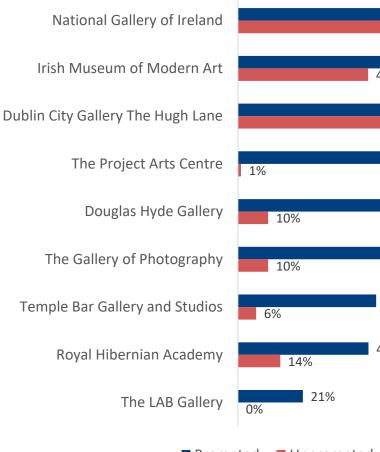
¥

1.	Summary of Results	2
П.	Background, Respondent Profile	9
111.	Public Libraries	14
IV.	Perceptions & Impact of Arts & Culture	18
V.	Awareness of Art Galleries	21
VI.	Arts & Culture Participation	24
VII.	Finding Out About Events	26
VIII.	Events and Designations	29
IX.	Engaging with Arts & Culture	33

Prompted & Unprompted Awareness



Dublin Galleries Prompted and Unprompted Awareness



95% 81% 88% 43% 80% 63% 68% 49% 49% 46% 43%

Prompted Unprompted

There is scope for improving unprompted awareness ("top of mind") for several galleries, especially for the Irish Museum of Modern Art

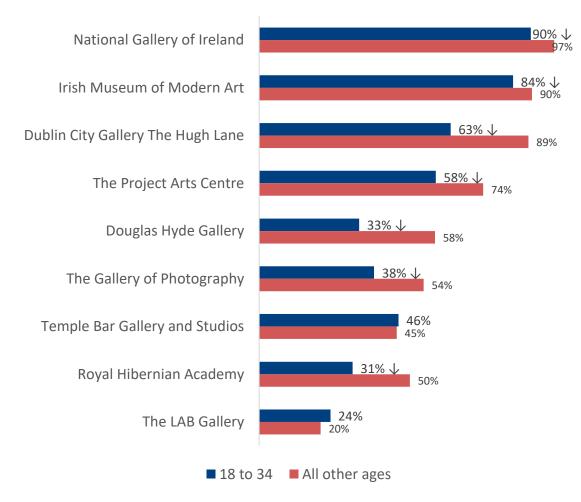
At the unprompted level The Project Arts Centre is not perceived as a gallery

Unprompted awareness is the percentage of respondents naming a given gallery in response to "Please name up to 5 galleries in Dublin".

Prompted awareness is the percentage of respondents indicating that they have heard of a named gallery.



Dublin Galleries Prompted Awareness by Age Group



Prompted awareness is significantly lower among 18 to 34 year olds for most galleries

Prompted awareness for The Project Arts Centre and The Gallery of Photography is highest among Dublin City Council area residents, at 75% and 57% respectively

Prompted awareness for The Gallery of Photography is lowest among Fingal County Council area residents, at 36%

Prompted awareness for The LAB Gallery is highest among those at work, at 25%

Prompted awareness for The RHA is highest among those with a third level postgraduate qualification, at 55%

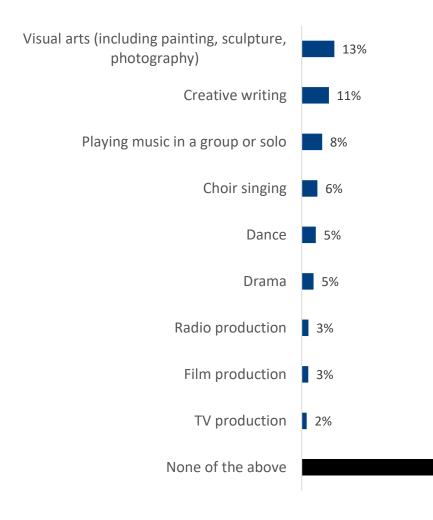
Agenda

¥

Ι.	Summary of Results	2
11.	Background, Respondent Profile	9
111.	Public Libraries	14
IV.	Perceptions & Impact of Arts & Culture	18
V.	Awareness of Art Galleries	21
VI.	Arts & Culture Participation	24
VII.	Finding Out About Events	26
VIII.	Events and Designations	29
IX.	Engaging with Arts & Culture	33



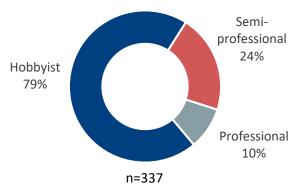
Q. Do you engage as a participant in any of the following? Please select all that apply.



35% of respondents engage in some form of artistic or cultural activity as a participant

Female respondents more likely to engage in Dance (9%)

Q. What is your level of involvement?



Professional engagement highest for TV production

65%

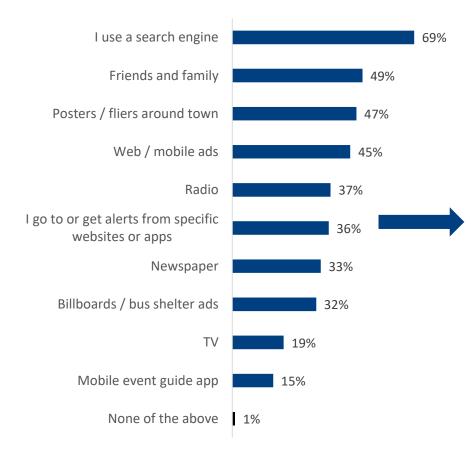
Agenda

1

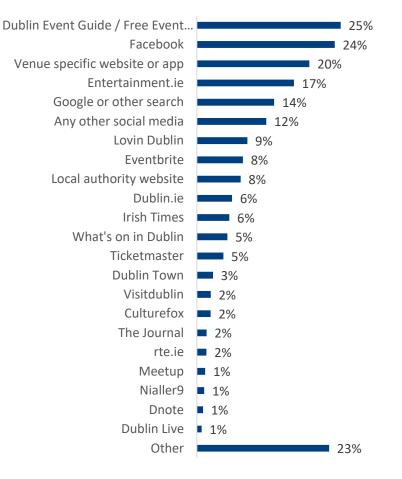
1.	Summary of Results	2
11.	Background, Respondent Profile	9
111.	Public Libraries	14
IV.	Perceptions & Impact of Arts & Culture	18
V.	Awareness of Art Galleries	21
VI.	Arts & Culture Participation	24
VII.	Finding Out About Events	26
VIII.	Events and Designations	29
IX.	Engaging with Arts & Culture	33

Comhairle Cathrach Bhaile Átha Cliath Dublin City Council

Q. If you are trying to find out what events are happening in Dublin, what sources do you usually rely on for information? Please select all that apply.

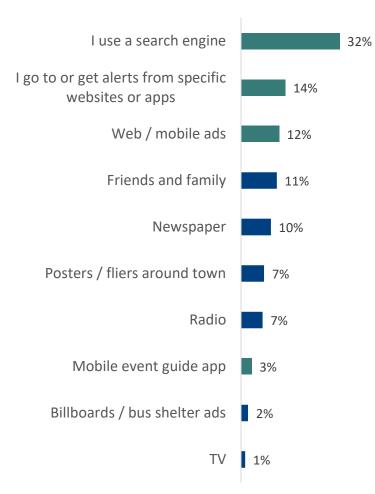


Q. What specific websites or apps would you use for information about what's going on in Dublin?





Q. What is your <u>main</u> source of information about what is going on in Dublin? (Select one only)





Digital sources combined represent 61% of main sources of information about events

Agenda

¥

1.	Summary of Results	2
н.	Background, Respondent Profile	9
111.	Public Libraries	14
IV.	Perceptions & Impact of Arts & Culture	18
V.	Awareness of Art Galleries	21
VI.	Arts & Culture Participation	24
VII.	Finding Out About Events	26
VIII.	Events and Designations	29
IX.	Engaging with Arts & Culture	33

Comhairle Cathrach Bhaile Átha Cliath Dublin City Council

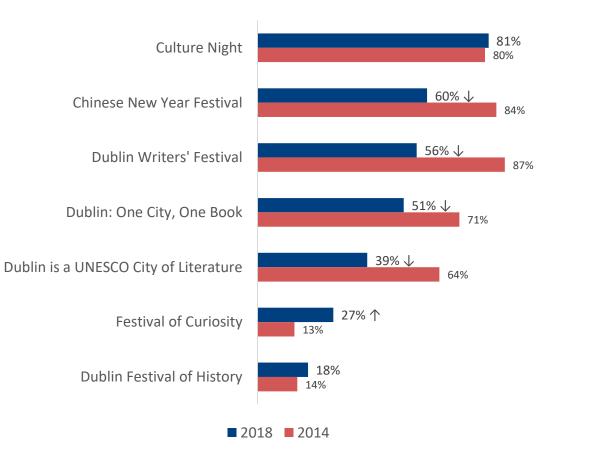
Q. Which of the following cultural events in Dublin or designations were you aware of before today? Please select as many as apply.



Awareness tends to be highest among 35 to 65 year olds, among those in employment, and among female respondents



Q. Which of the following cultural events in Dublin or designations were you aware of before today? Please select as many as apply. 2014 to 2018



Awareness of Culture Night is consistent

Significant drops in awareness for several events / designations

Increase in awareness of Festival of Curiosity

31

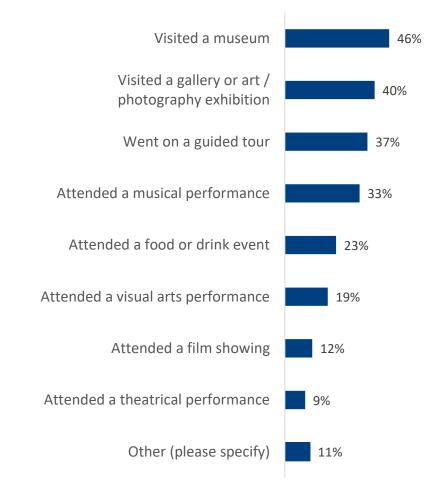


Q. Did you attend any events in Dublin during the 2017 Culture Night (September 2017)?

Yes, 37% No, 56% Can't remember, 8%

> No significant differences when analysed by main demographics

Q. Which Culture Night event(s) did you attend in 2017? Please select all that apply.



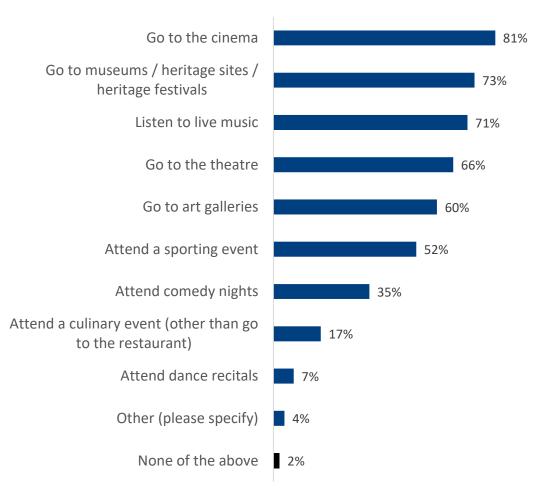
Agenda

¥

1.	Summary of Results	2
П.	Background, Respondent Profile	9
111.	Public Libraries	14
IV.	Perceptions & Impact of Arts & Culture	18
V.	Awareness of Art Galleries	21
VI.	Arts & Culture Participation	24
VII.	Finding Out About Events	26
VIII.	Events and Designations	29
IX.	Engaging with Arts & Culture	33



Q. Do you ever do any of the following in Dublin? Please select all that apply.



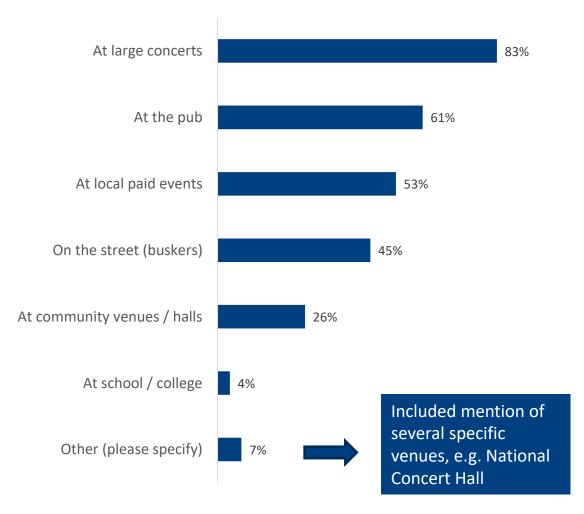
35 to 49 year olds tend to be the most engaged with cultural activities

Respondents in employment more likely to attend cultural events than those not in employment

Engagement with cultural activities tended to increase with education



Q. Where do you listen to live music? Please select all that apply.

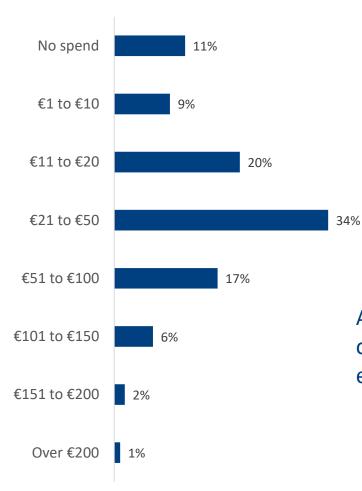


Over 65s were least likely to listen to live music at the pub (35%) or at large concerts (63%)

Those not in employment were less likely to attend large concerts (72%)

Comhairle Cathrach Bhaile Átha Cliath Dublin City Council

Q. On average, approximately how much per month do you usually spend on Arts and Culture related events?



€40.74

Average monthly spend on Arts & Culture related events Respondents with up to second level education were more likely to have no spend on Arts & Culture related events (22%)

Respondents not at work were more likely to have no spend on Arts & Culture related events (17%)

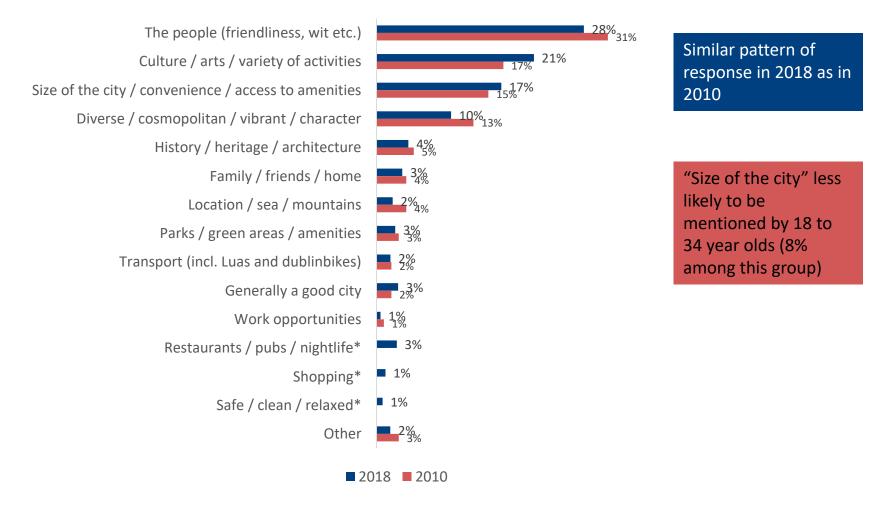
Respondents aged 50 or over spent significantly less on Arts & Culture related events

Respondents at work spent significantly more than average on Arts & Culture related events

Average spend was highest among those with a third level degree



Q. What is the best thing about Dublin? 2010 to 2018



*did not feature in 2010 "Don't know" excluded 2018 N=904 2010 N=2,253



Q. What is the best thing about Dublin?

beautiful theatres different Park place everything everywhere activities community feel walking home social museums buildings places ease art things see theatre someth love also heritage town historic triendliness a get big histo capital public **y** galleries **000**C music lots pubs scene withir transport vibrant festivals like Size always proximity enough venues plenty parks tree accessible centre ^{much} locals atmosphere It's live sense waik time access Lively gc walkable go restaurants Accessibility mountains gre diversity many close cultures shops fact arts buzz shopping old local one easily

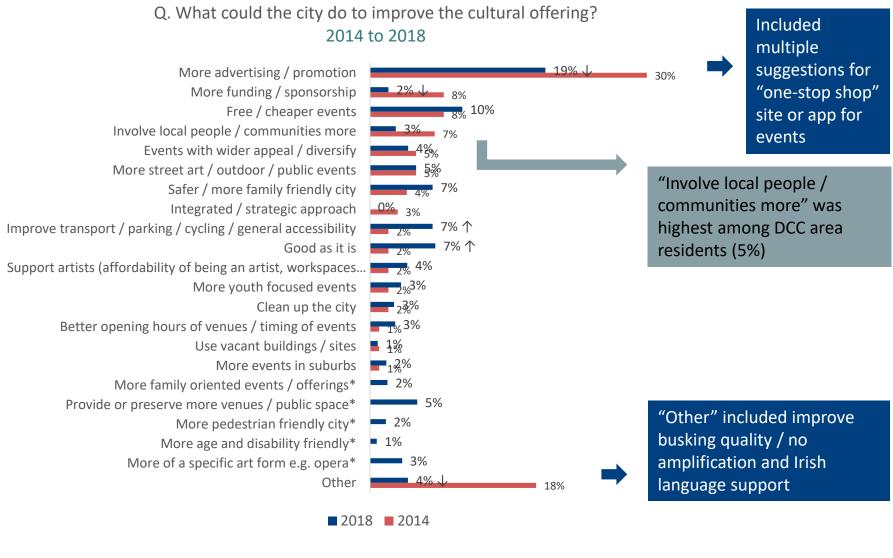


Q. What is the best thing about Dublin? – Selected Comments*

- People, great city for culture and events, the craic
- There's always something on and we have so many great cultural spaces available to us that Dubliners are always interested to hear about and engage with new things.
- Locations/venues are reachable by foot or Luas / bus
- Friendly people makes you feels like you are home
- City of surprises great for walking most places are centrally located loads of history, churches, museums and fine buildings
- Its location; beside the sea, near the mountains, on the river beat that! Parks, beautiful streets, good shopping, a hive of activity - festivals, community events, a huge variety of cultural activities to chose from every day and at weekends especially. Diversity of cultures, making it a less white monoculture. Croke Park, Lansdowne Road, Aquatic Centre, local sports clubs everywhere. Cathedrals, museums, friendly people. You asked for the best - I love living in Dublin and to me, these are all superlatives!

*Complete set of verbatim comments in accompanying full report





*did not feature in 2014 "Don't know" excluded 2018 N=820 2014 N=735



Q. What could the city do to improve the cultural offering?



Comhairle Cathrach Bhaile Átha Cliath Dublin City Council

Q. What could the city do to improve the cultural offering? – Selected comments*

- One source/guide for everything that is on in Dublin. Sometimes it's difficult to find things that you're interested in, so I search multiple different sources to see small events, free events, street events, cultural events. I'm sure it is hard to capture everything, but if it was a community collaborative approach, it would be amazing!
- Maybe more advertisement of upcoming events
- More low cost spaces for studios and rehearsal spaces to encourage new and upcoming artists of all types.
- Make streets safe from crime
- More green spaces in the north inner city that are suitable for impromptu/ casual/ small community events and gatherings.
- Have some more events outside of the city centre. Suburbs etc
- Be a little cleaner with more rubbish bins, also get rid of derelict buildings by making landlords clean them up.
- There is a lot of Arts events aimed at middle class people/families. There should be more engagement in working class communities- especially through schools and youth projects.

*Complete set of verbatim comments in accompanying full report

END

For further information please contact:

- Economic Development Office
- Dublin City Council
- 01 222 5611
- research@dublincity.ie



Bhaile Átha Cliath **Dublin City Council**