Your Dublin, Your Voice

Build Back Better

August 2020 – Executive Report

Survey Reference Period: August 2020

Report by Delve Research

Survey Research & Analysis

www.delve-research.com

Agenda

Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

Background to this survey

YOUR DUBLIN YOUR VOICE
DUBLIN OPINION PANEL

- Online survey, 13th August - 21st August 2020
- 951 respondents from the "Your Dublin, Your Voice" opinion panel
- 20% response rate
- Global margin of error +/- 3.2%
- Robust panel in existence since 2010, recruitment through various channels

Respondent Profile

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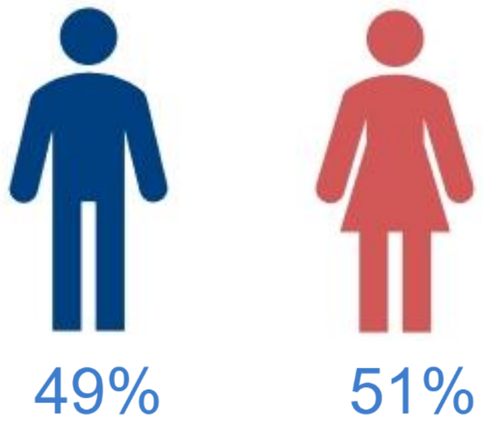
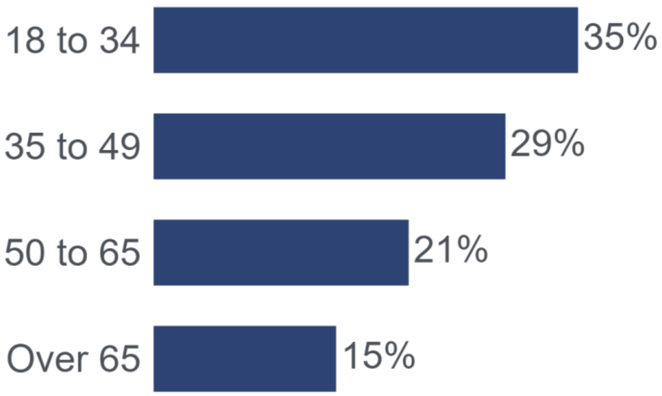
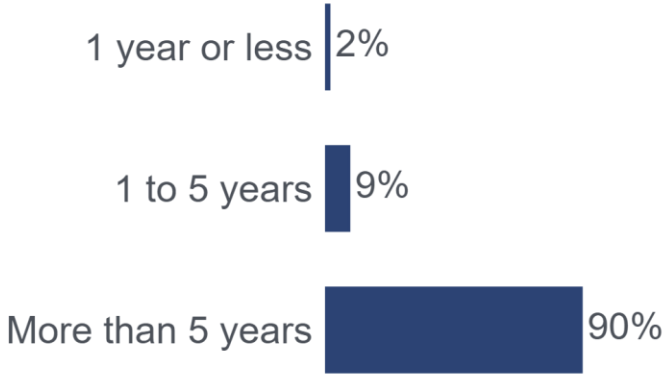


Age Group

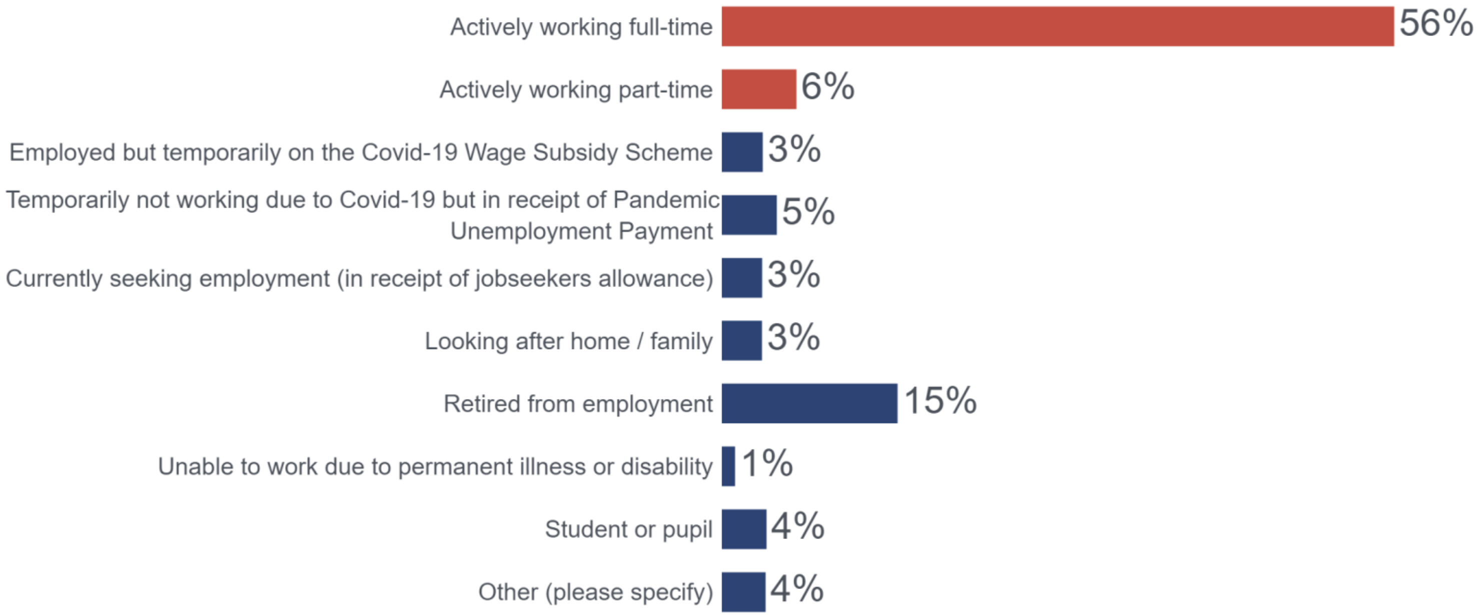


Time Living in Dublin



22% with dependent children in household

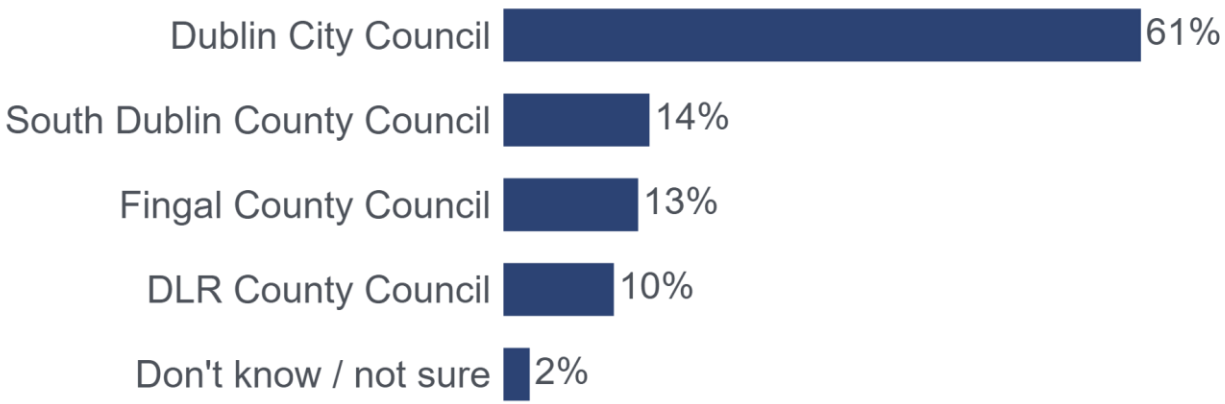
Employment Status



Respondent Profile

30 nationalities represented on this survey, 90% Irish

Local Authority

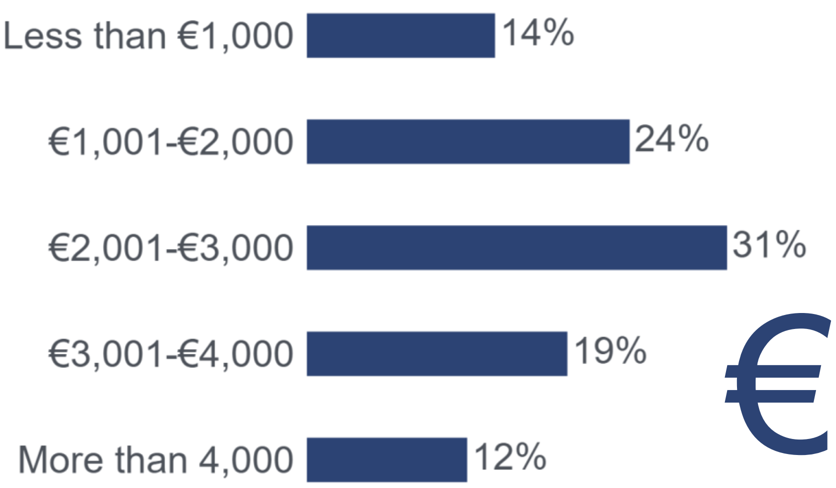


Current Area of Residence

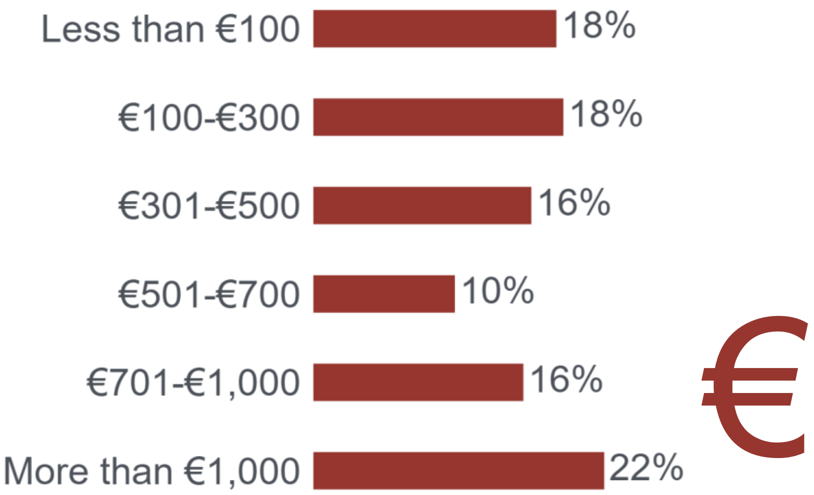
	%
Dublin 1	3%
Dublin 2	2%
Dublin 3	5%
Dublin 4	3%
Dublin 5	4%
Dublin 6	5%
Dublin 6W	3%
Dublin 7	7%
Dublin 8	9%
Dublin 9	8%
Dublin 10	1%
Dublin 11	4%
Dublin 12	7%
Dublin 13	4%
Dublin 14	4%
Dublin 15	3%
Dublin 16	3%
Dublin 17	0%
Dublin 18	2%
Dublin 20	1%
Dublin 22	2%
Dublin 24	2%
County Dublin	12%
Outside County Dublin	6%

Respondent Profile

Monthly Income After Taxes, Before Bills



Monthly Disposable Income After Bills Are Paid



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Summary

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Working From Home

- 56% of those working worked from home on a daily basis in August 2020. This figure was down from 76% in May 2020.
- 41% of those at work felt that they would be working from home in the medium to long term.

Commute

- The average commute distance for those at work or studying was 8.9km. Those rose to 10.3km among those with dependent children.
- Pre-COVID, 32% of those travelling to work or study used public transport. 20% plan to use public transport post-COVID.

Encouraging Walking or Cycling

- An improved cycle lane network in the city was the most common factor selected which would encourage respondents to cycle more, followed by less traffic on the roads and increased / safe cycle parking. More pedestrianised areas and improved and wider footpaths would offer the strongest encouragement to people to walk more.
- Males were more likely to want improved cycling and pedestrian infrastructure, while females were more likely to want cycle training or a bike buddy programme
- Cycling and pedestrian infrastructure would be of greatest encouragement to the 18 to 34 year-old age group
- All potential encouragements were most popular among those living in Dublin 1 to 5 years

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Household Energy Use During the Restrictions

- 61% reported that their household was using more energy during the COVID-19 restrictions.
- A majority of respondents reported an increase in charging of PCs, laptops and other devices (79%), as well as food preparation (71%).
- Those aged under 65, those at work, and those with dependent children were more likely to report increases in energy consuming activities.

Changes in Behaviour Since mid-March

- A majority of respondents said that they were shopping locally more often (56%) and buying more food (51%) since mid-March. 49% reported an increase in cleaning and 47% reported an increase in entertainment / exercise in their household.

Experience of Wildlife and Nature during the COVID-19 Restrictions

- 50% of respondents reported that wildlife had helped them cope during the COVID-19 restrictions.
- Similar numbers said that they spent more time in nature during the restrictions (49%) and that they actively sought out nature and wildlife during the restrictions (48%).
- 18% reported that their experience of nature and wildlife did not change during that period.
- Increased engagement with nature and wildlife tended to be higher among the under 50s and was particularly higher among those living in Dublin 1 to 5 years.

Adapting to a "New Normal"

- Majorities would like to see the retention of the temporary cycle lanes and wider footpaths (67%) and the promotion and protection of wildlife as part of government plans and actions (64%) as we move on from COVID-19. These tended to be more popular areas for focus among younger respondents.
- 46% would like to see financial incentives for making their home more energy efficient – this was higher among older respondents.

Post-COVID Anticipated Behaviours

- 45% of respondents anticipated that they will use public transport less post-COVID than they had previously. 38% anticipated going less often to the city centre for socialising, 36% anticipated going less often to the city centre to eat out or for shopping (non-grocery).
- 51% anticipated having a staycation in Ireland (outside of Dublin) more often post-COVID. 15% anticipated staycationing in Dublin more often.

Encouraging post-COVID Behaviours

- "Better / cheaper / safer public transport" was the most commonly mentioned thing to encourage people to go to the city centre more often for shopping and socialising.
- "Cheaper food / offers" was the most commonly mentioned thing to encourage people to go to the city centre more often to eat out.
- Among pre-pandemic public transport users, mandatory face coverings or better face covering compliance were the most commonly mentioned thing to encourage them to use public transport more post-pandemic.
- "Cheaper prices / better value" would be the biggest enticement for people to staycation in Ireland more, both in Dublin and outside Dublin.

Summary

Priorities for Retail Business

- Respondents felt that the number one priority for retail businesses should be taking all possible measures to ensure public health. They expected that the actual priority for businesses would be returning to pre-pandemic turnover / sales levels as quickly as possible.

"Build Back Better" Initiatives

- The top three "Build Back Better" initiatives among respondents were:
  - Keeping more money in our local economy (e.g. through changing how we buy and procure goods and services) (70% selecting)
  - Building equality, fairness and impartiality into all policies and programmes (65%)
  - Only using our funds to invest in projects that will be good for the environment (54%)

"Business Ecosystem" Initiatives

- The top three "Business Ecosystem" initiatives among respondents were:
  - Providing incentives to businesses that operate green or pro-environmental practices (64% selecting)
  - Providing more support for sectors most badly affected by COVID-19 (e.g. the hospitality sector) (62%)
  - Making sure all businesses can access the finance they need to adapt and grow (51%)

"People" Initiatives

- The top three "People" initiatives among respondents were:
  - Retraining / reskilling workers for an increasingly changing world (68% selecting)
  - Supporting the unemployed to find and secure work (67%)
  - Supporting creative workers e.g. musicians, writers, actors etc. (58%)

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“Place” Initiatives

- The top three “Place” initiatives among respondents were:
  - Improving the vibrancy and attractiveness of local places (55% selecting)
  - Providing more residential accommodation in the city centre (54%)
  - Supporting local cultural events and venues (53%)

“Infrastructure” Initiatives

- The top three “Infrastructure” initiatives among respondents were:
  - Investing in green infrastructure e.g. planting trees, parks etc. (63% selecting)
  - Investing in public transport (63%)
  - Improving cycle lanes (52%)

“Green Recovery” Initiatives

- The top three “Green Recovery” initiatives among respondents were:
  - Investing in renewable energy resources (57% selecting)
  - Investing in more walking and cycling routes (55%)
  - Improving houses so that they are more energy efficient (52%)

Consideration of the Environment

- 58% of respondents felt that they would be more considerate of the environment as the economy emerges from the pandemic restrictions. 25% felt that individuals around them would be more considerate of the environment.

Summary

Would Like to See From Business

- The most common thing that respondents would like to see from businesses as they emerge from the pandemic restrictions is for them to be more sustainable / green and to encourage active commuting. This was followed by adherence to public health guidelines and support for employees.

Would Like to See From Your Local Authority

- The most common things that respondents would like to see from their local authority as communities emerge from the pandemic restrictions are improved cycling infrastructure, more outdoor seating / amenities / green spaces and reductions in traffic / more pedestrianisation.

Hopes for Dublin

- The most hoped for things for Dublin among respondents as the city emerges from the pandemic restrictions are that it will be a cleaner and greener city, that there will be less traffic / more pedestrianisation, and that it will be a more people friendly city putting people first.

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Working Arrangements

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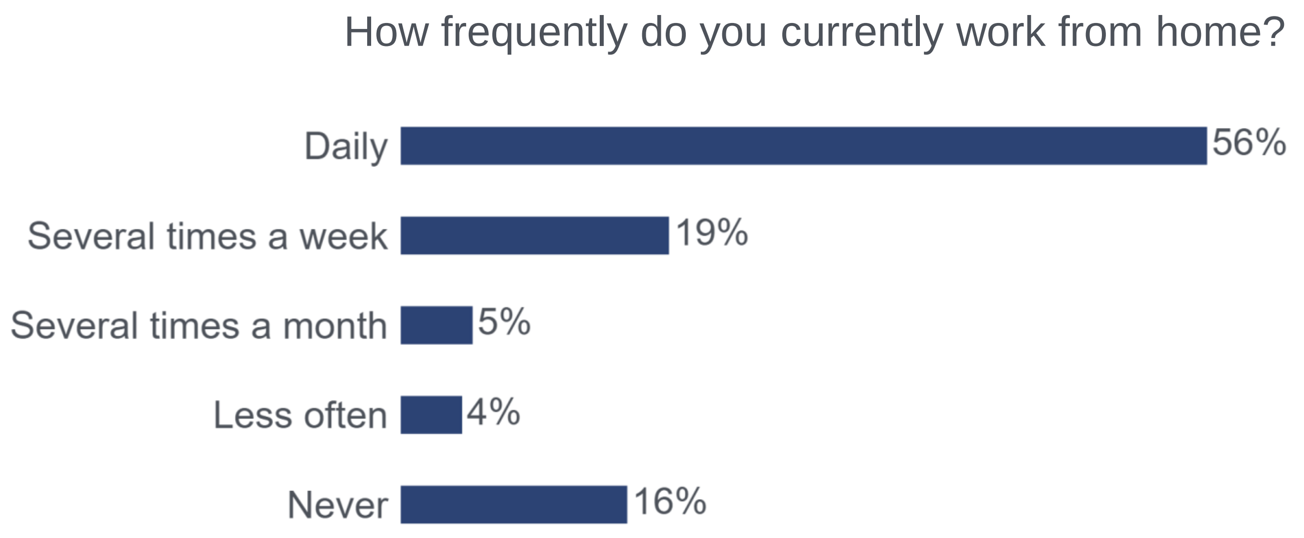
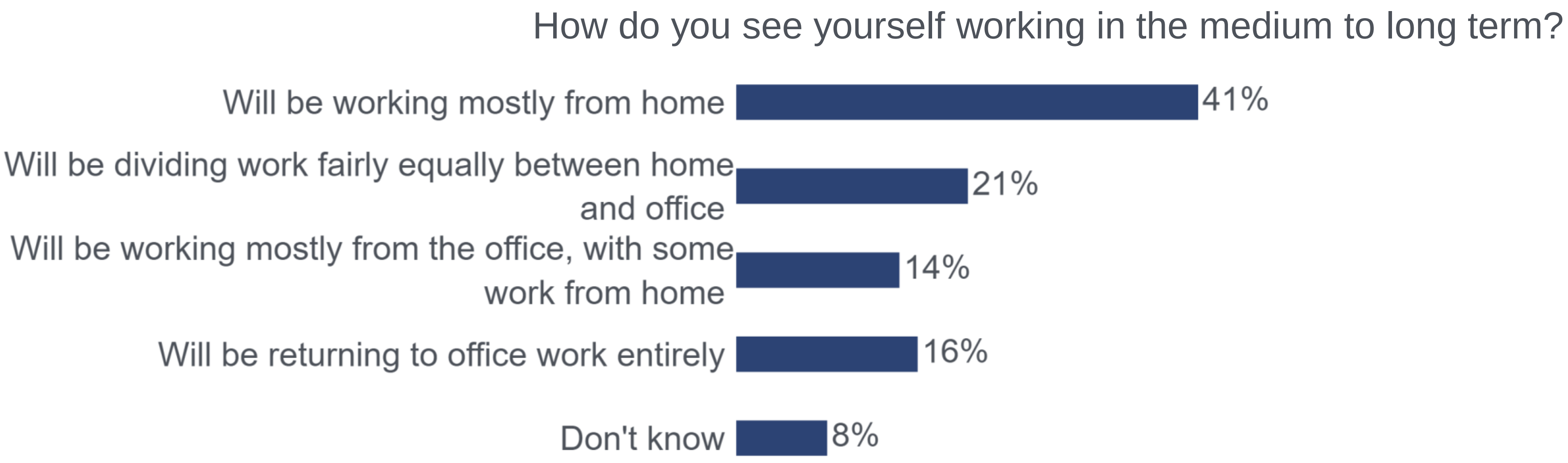


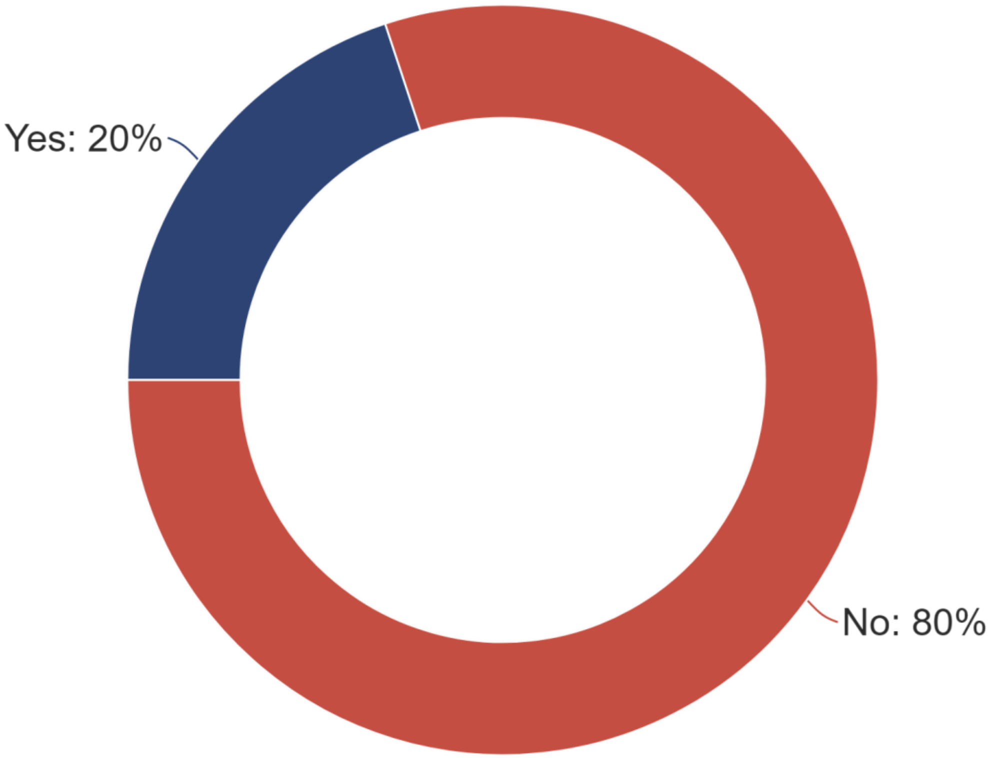
May 2020 - 76% daily



sample size: 615

Change in Occupation Status

Has your occupation status changed since the implementation of COVID-19 measures in mid-March?



"Yes" was highest among 18 to 34 year-olds at **27%**

sample size: 947

Commute Distance

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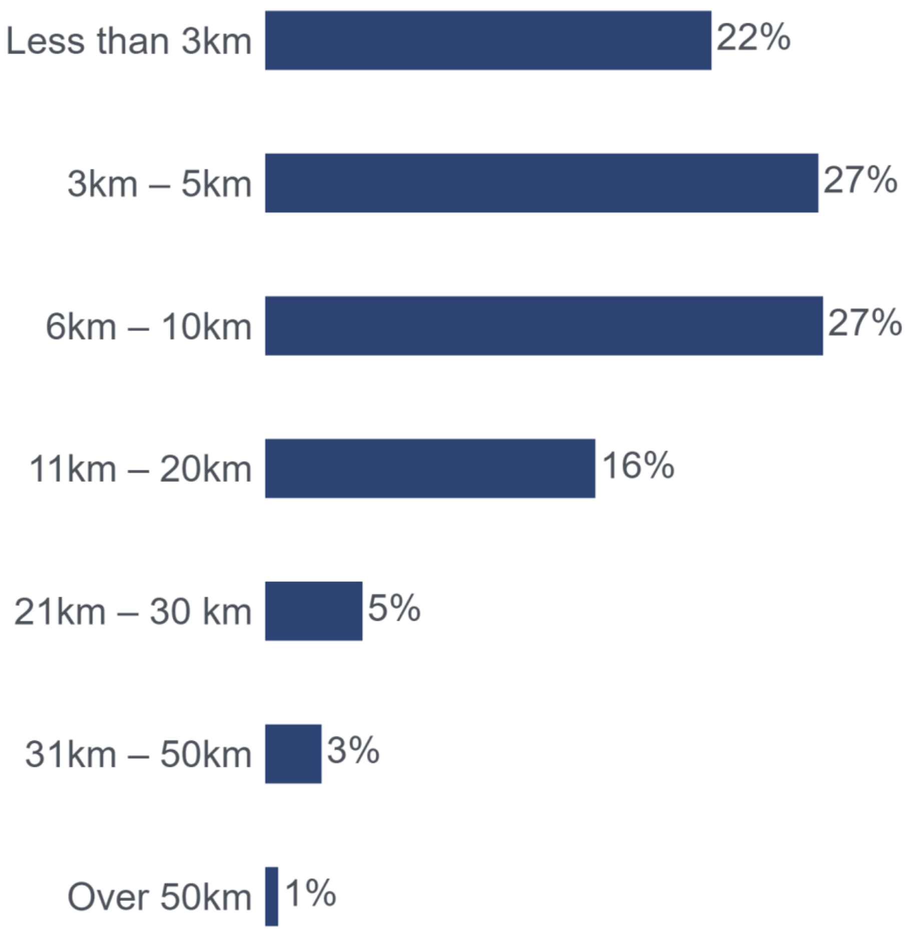
What is the one-way distance of your normal (pre-COVID-19) commute to work or school / college?



Average commute distance **8.9km**

Higher for those with dependent children – 10.3km

sample size: 703

Pre and Post-COVID Travel to Work / College

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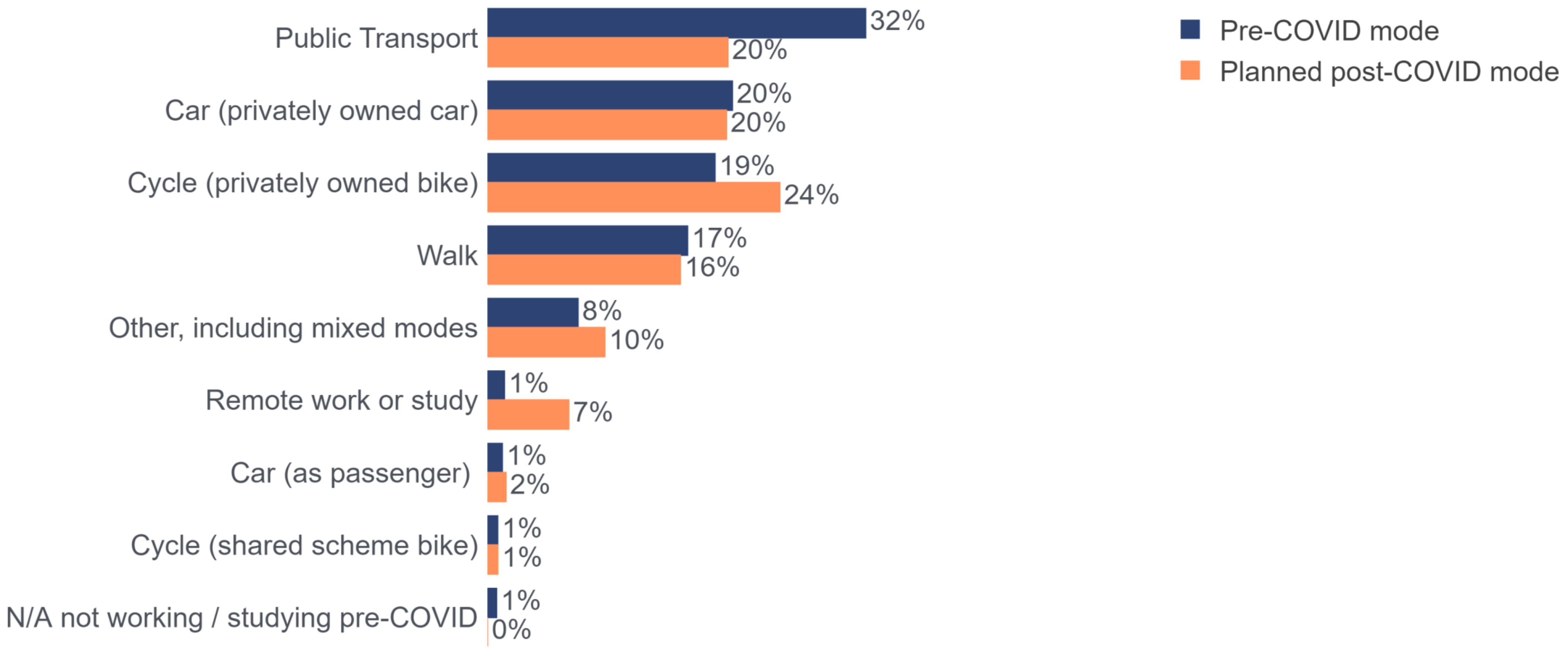
Before the COVID-19 restrictions, how did you usually travel to and from work or school / college?
How do you plan to travel to and from work (or school / college) once the COVID-19 restrictions are lifted?



sample size: 710

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Encouraging Walking or Cycling

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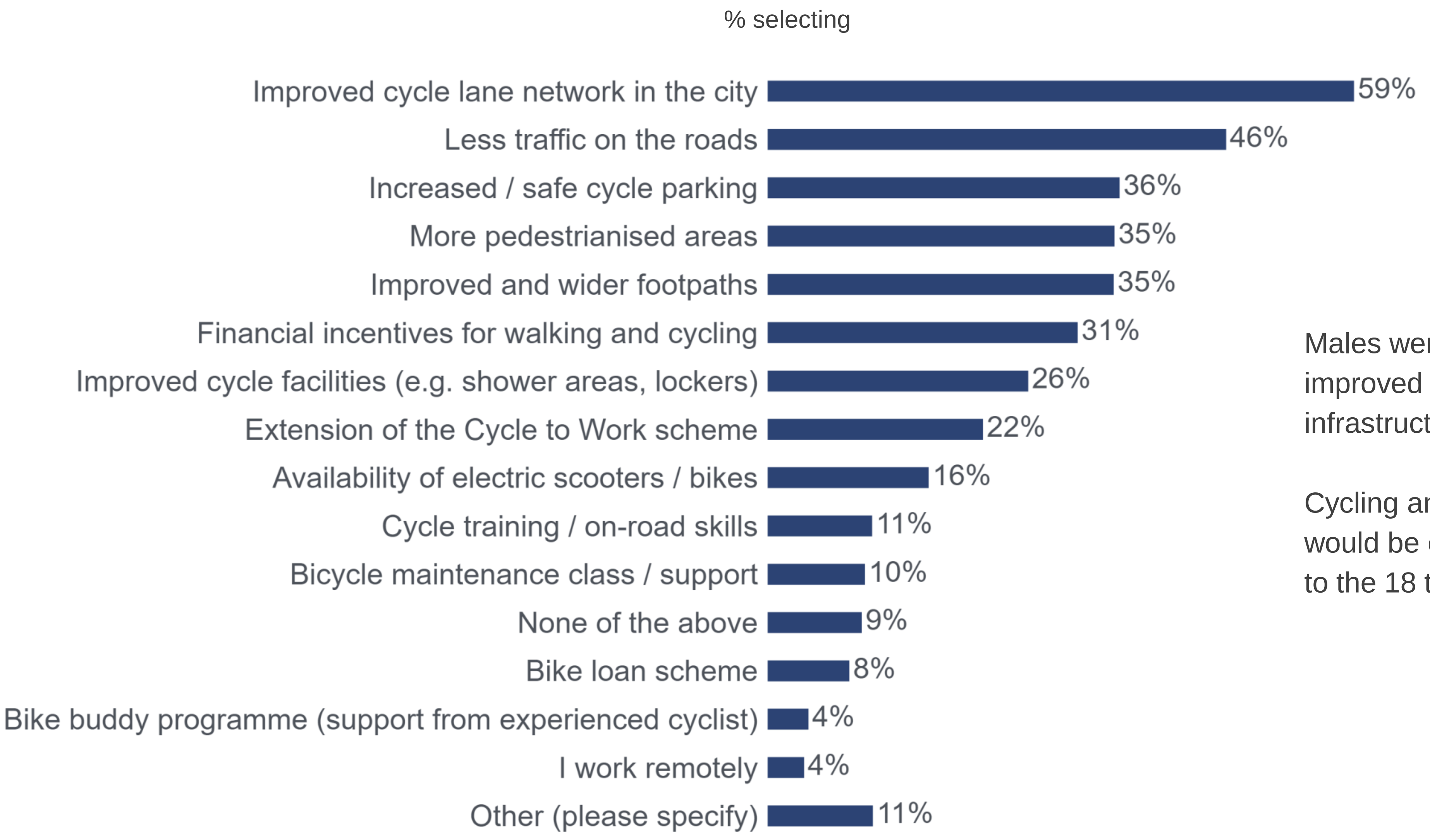
Which of the following would encourage you to walk or cycle, or would make you more comfortable with walking or cycling if you already do? Please select as many as apply.



Males were more likely to want improved cycling and pedestrian infrastructure.

Cycling and pedestrian infrastructure would be of greatest encouragement to the 18 to 34 year-old age group

sample size: 951

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Household Energy Use During Restrictions

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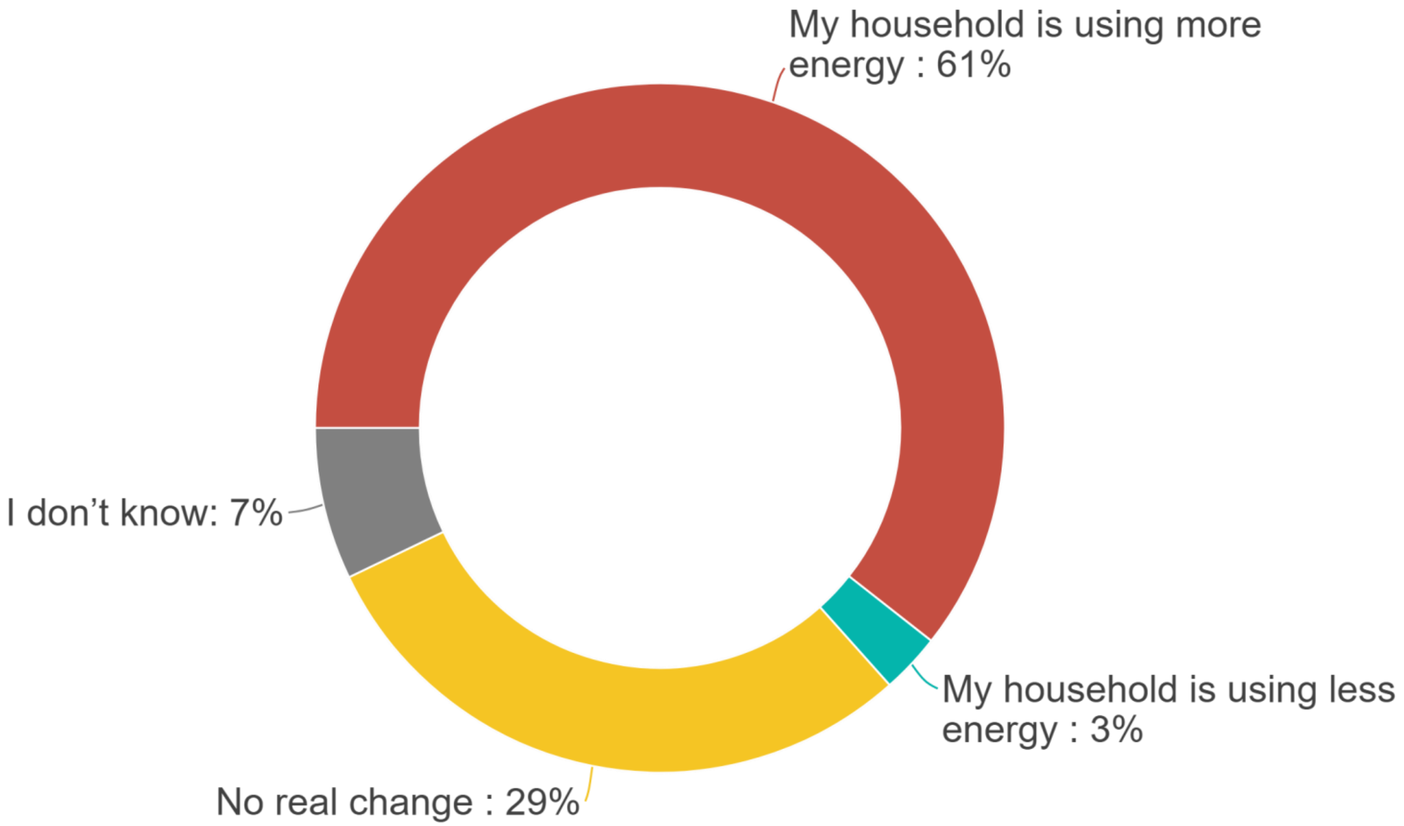
Which of the following best describes your energy usage in your household during the COVID-19 restrictions?



61% reported that their household was using more energy during the COVID-19 restrictions

Household energy use during the restrictions was more likely to be higher than normal among those under 65, among those working, and among those with dependent children in the household

sample size: 951

Increase in Household Activities

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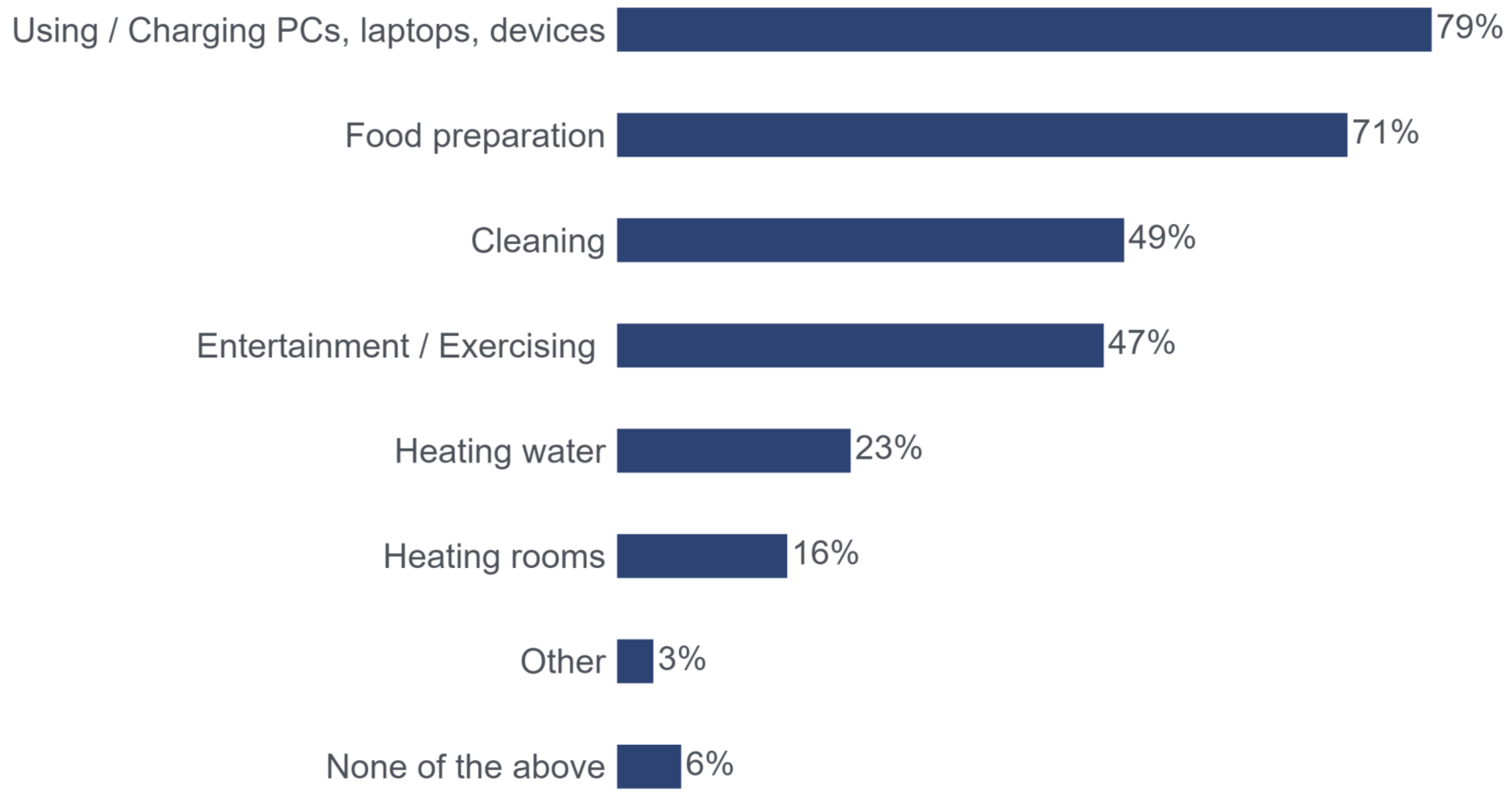
Which of the following activities have increased in your household during the COVID-19 restrictions? Please select as many as apply.

% selecting



94% of respondents reported an increase in at least one of these activities in their household.

Those aged under 65, those at work, and those with dependent children were more likely to report increases in these activities.

sample size: 951

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Behaviours Since mid-March

Which of the following statements are true for you since mid-March?

% selecting

A majority of respondents said that they were shopping locally more often (56%) and buying more food (51%) since mid-March.

Those aged 50 to 65 were most likely to be shopping locally more often. Under 50s were more likely to be buying more food and to be shopping online more often.

Over 65s were more likely than younger respondents to have started growing their own vegetables, while younger respondents were more likely to be buying more single use plastic.

sample size: 951

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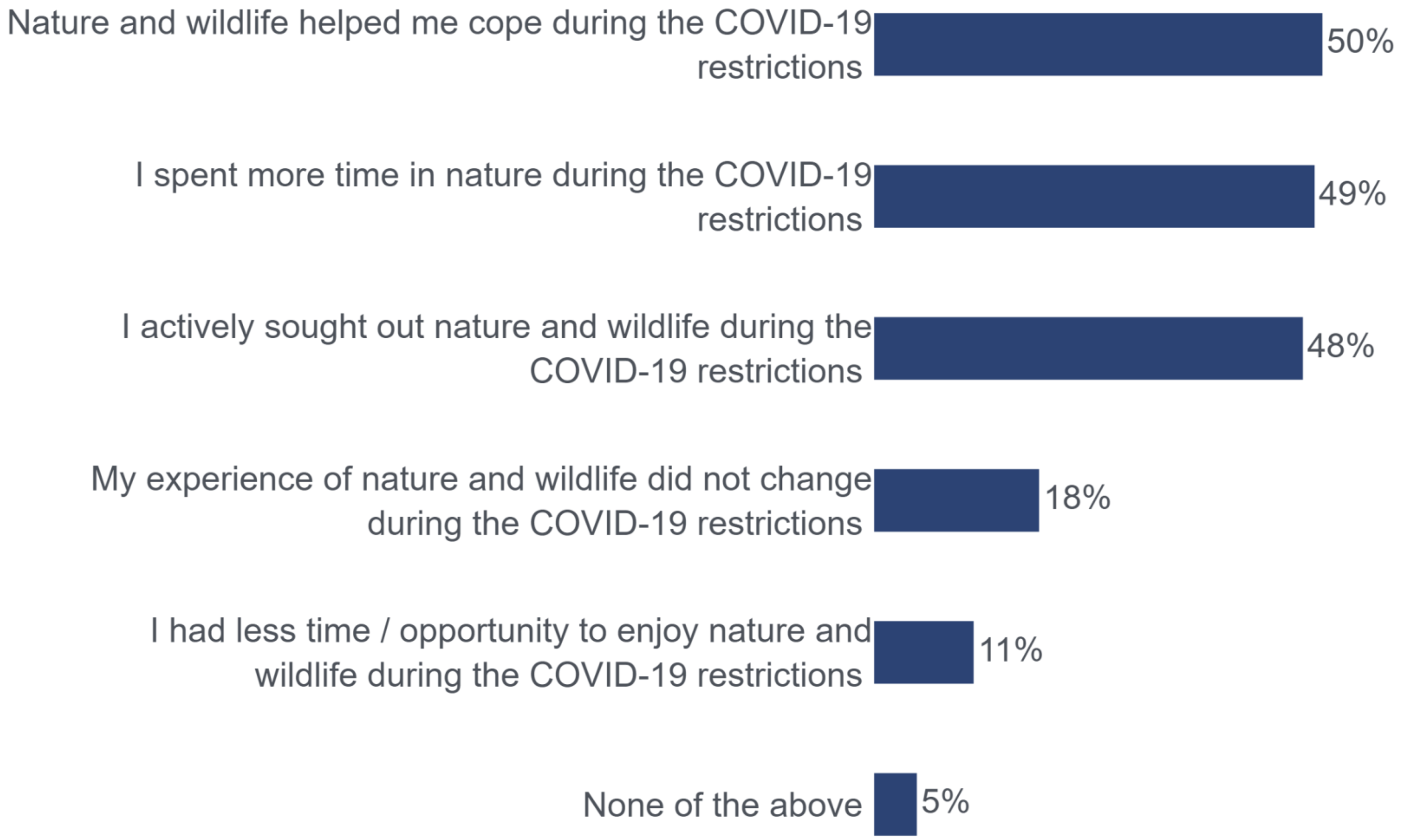
Which of the following statements describe your experience of nature and wildlife during the COVID-19 Restrictions?

% selecting



Increased engagement with nature and wildlife tended to be higher among the under 50s and was particularly higher among those living in Dublin for 1 to 5 years.

sample size: 949

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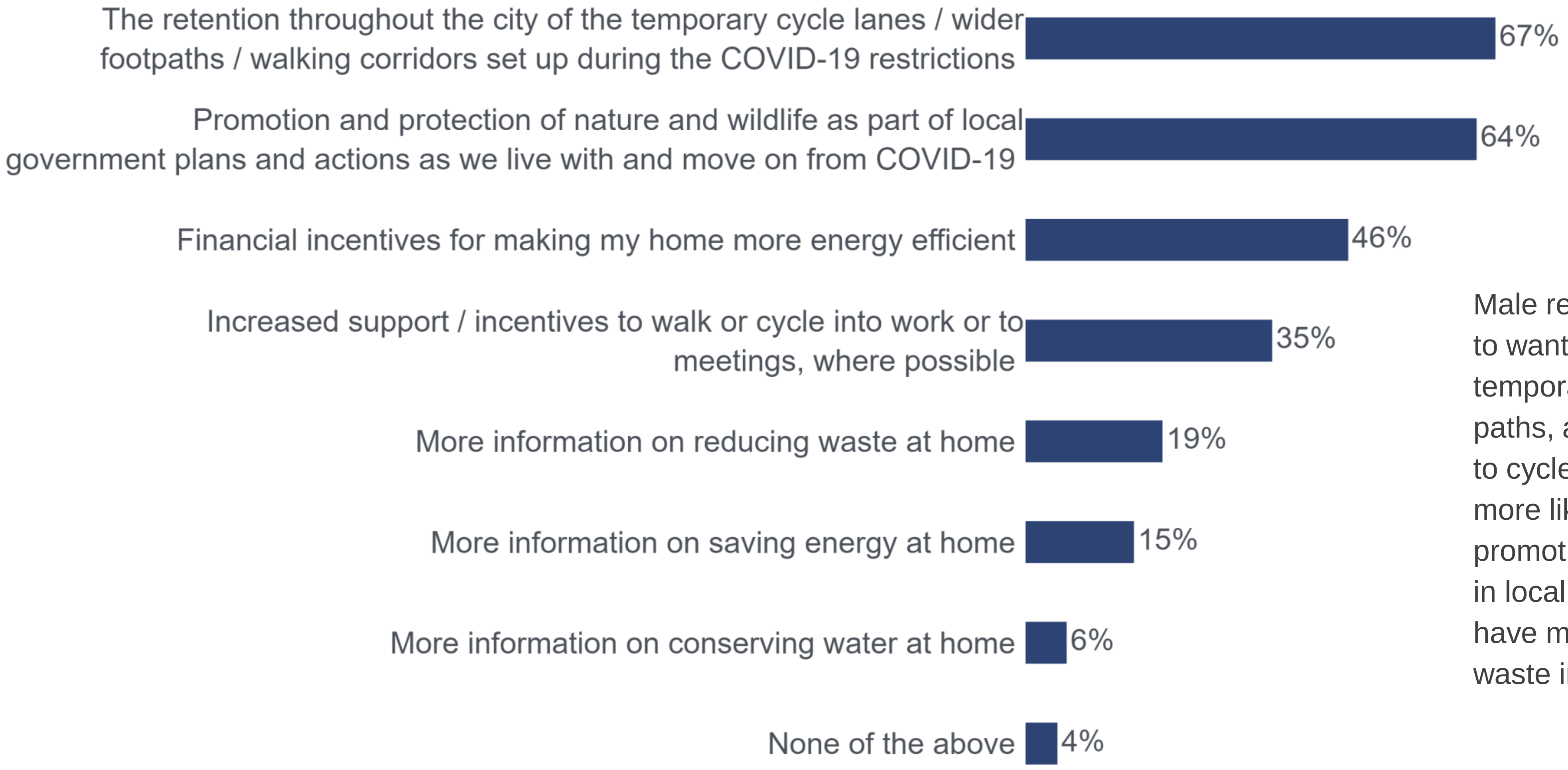
Which of the following would you like to see in place as we adapt to a 'new normal' as a result of COVID-19?



Male respondents were more likely to want to see the retention of temporary cycle lanes and walking paths, as well as financial incentives to cycle or walk. Females were more likely to be in favour of the promotion and protection of wildlife in local government plans, and to have more information on reducing waste in the home

sample size: 950

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Going to the City Centre and Other Activities - pre-COVID

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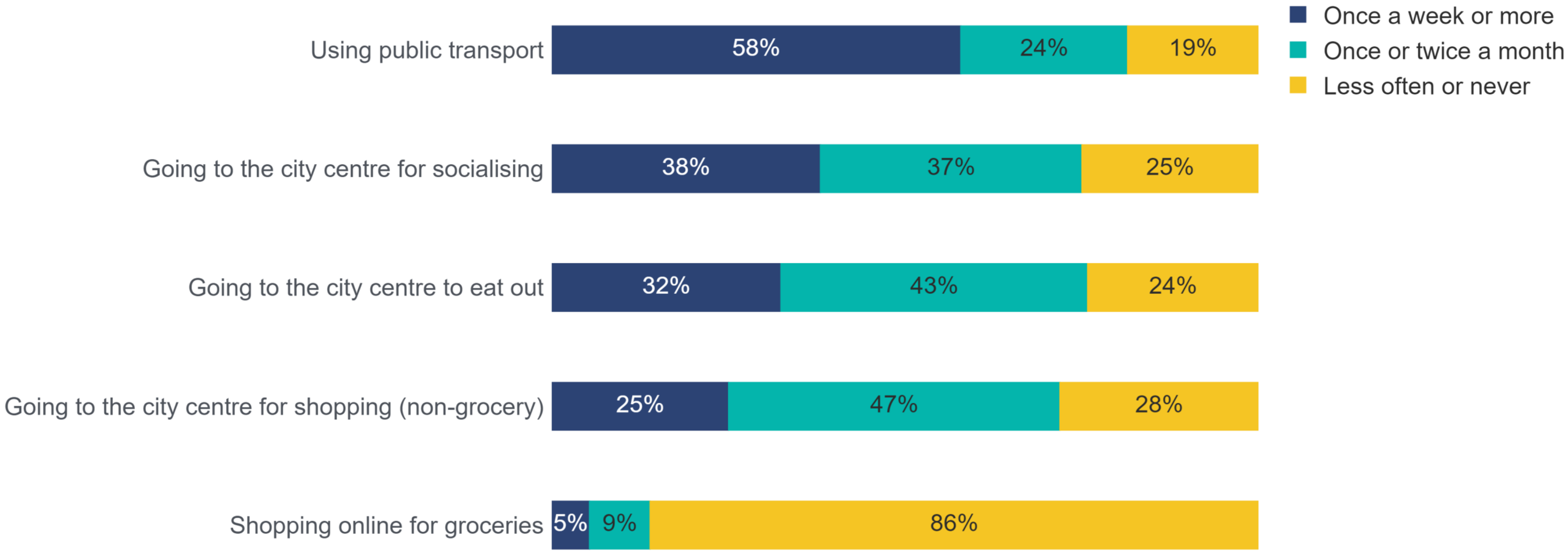
Before the COVID-19 restrictions, how often did you engage in each of the following activities?



sample size: 951

Going to the City Centre and Other Activities - post-COVID

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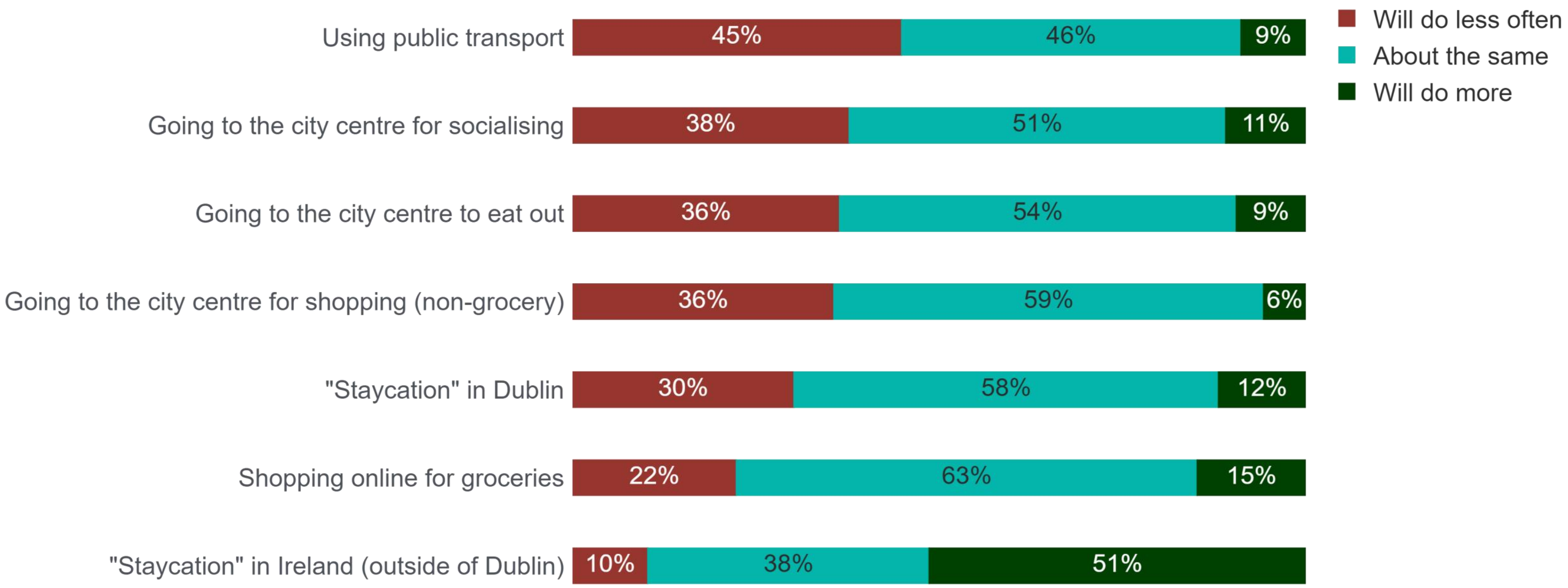
Please imagine when the COVID-19 situation is over and everything is "the new normal". How do you think you will be engaging in each of the following activities compared with your pre-COVID habits?



sample size: 951

Encouraging Activities post-COVID

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Respondents who indicated "Will do less" or "Will do about the same" for any of these activities were asked what would encourage them engage in each activity more:

- Going to the city centre for shopping (non-grocery)
- Going to the city centre for socialising
- Going to the city centre to eat out
- Using public transport
- Staycation in Ireland (outside Dublin)
- Staycation in Dublin

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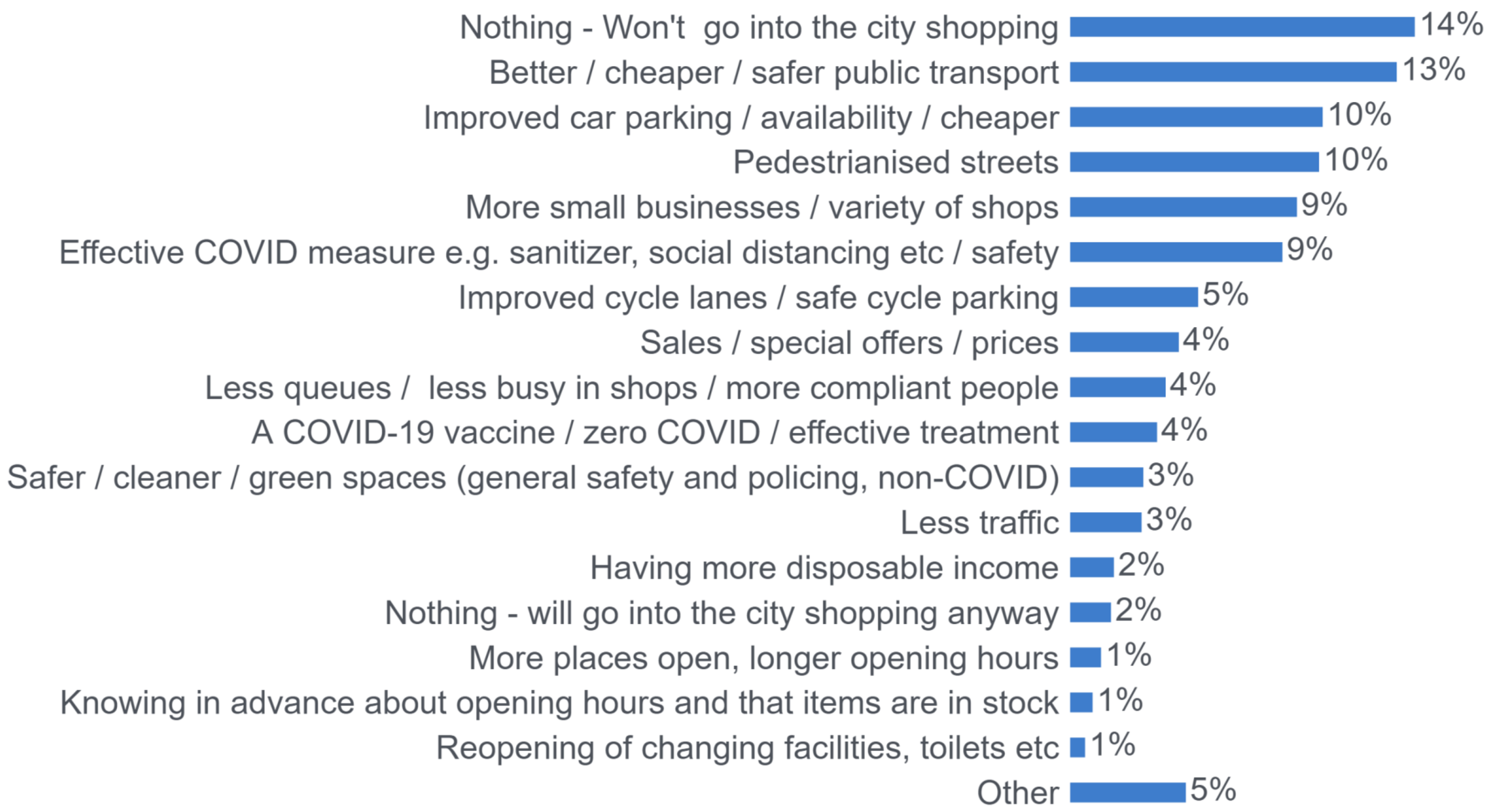
What would encourage you to engage in each of these activities more in a post-COVID world? - Going to the city centre for shopping (non-grocery)

coded verbatim comments, % first mentions



sample size: 706

Encouraging Going to the City Centre for Socialising

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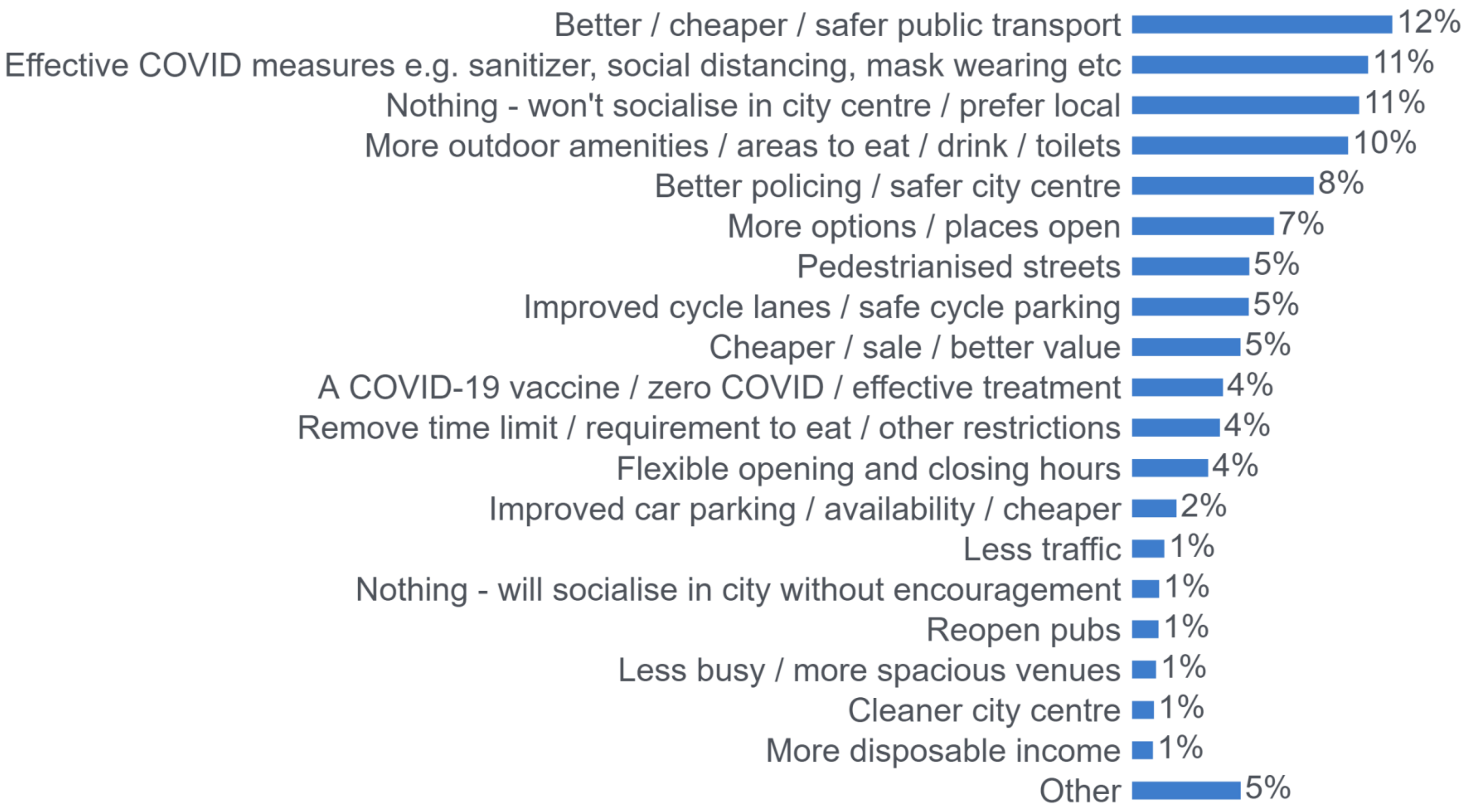
What would encourage you to engage in each of these activities more in a post-COVID world? - Going to the city centre for socialising

coded verbatim comments, % first mentions



sample size: 629

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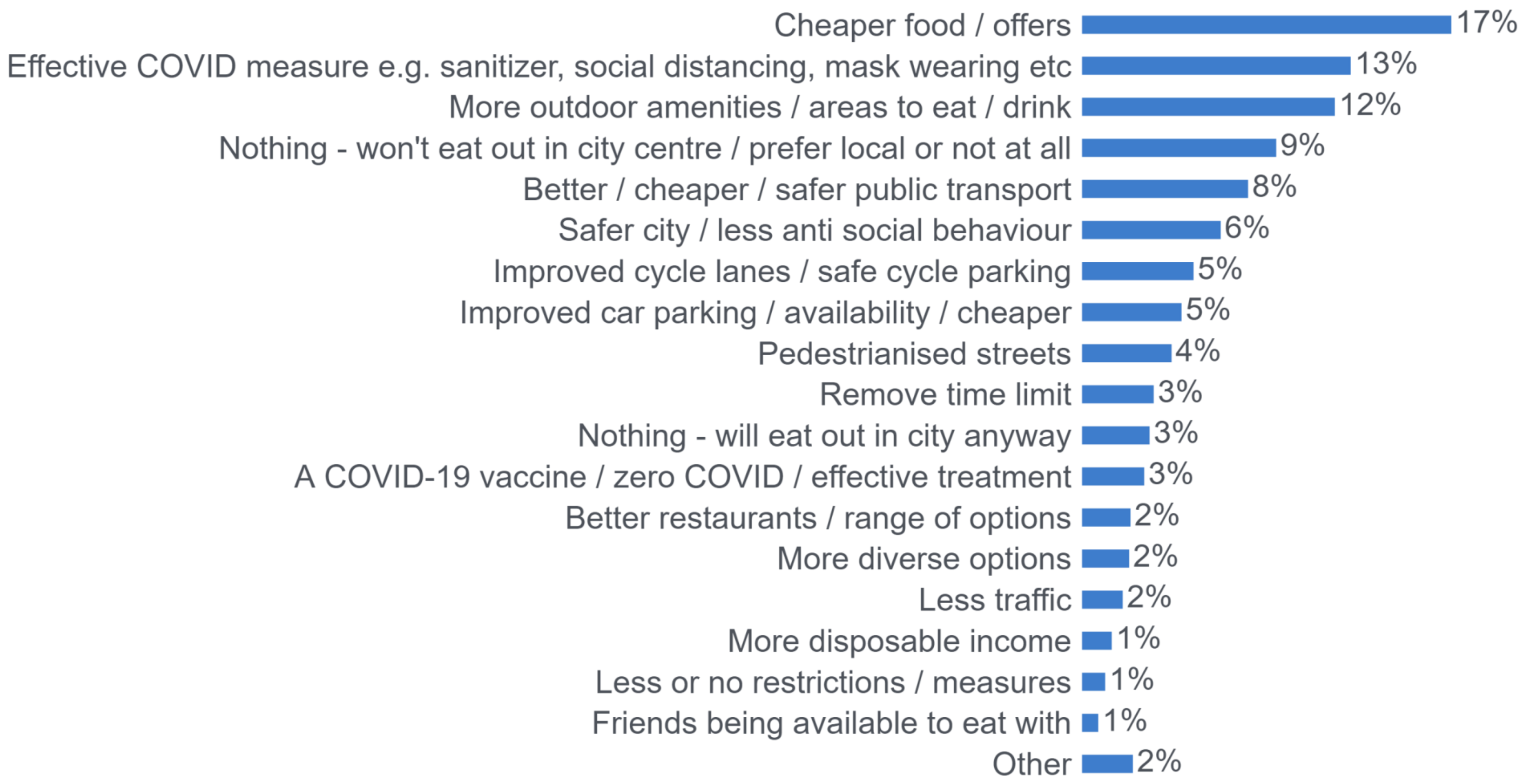
What would encourage you to engage in each of these activities more in a post-COVID world? - Going to the city centre to eat out

coded verbatim comments, % first mentions



sample size: 606

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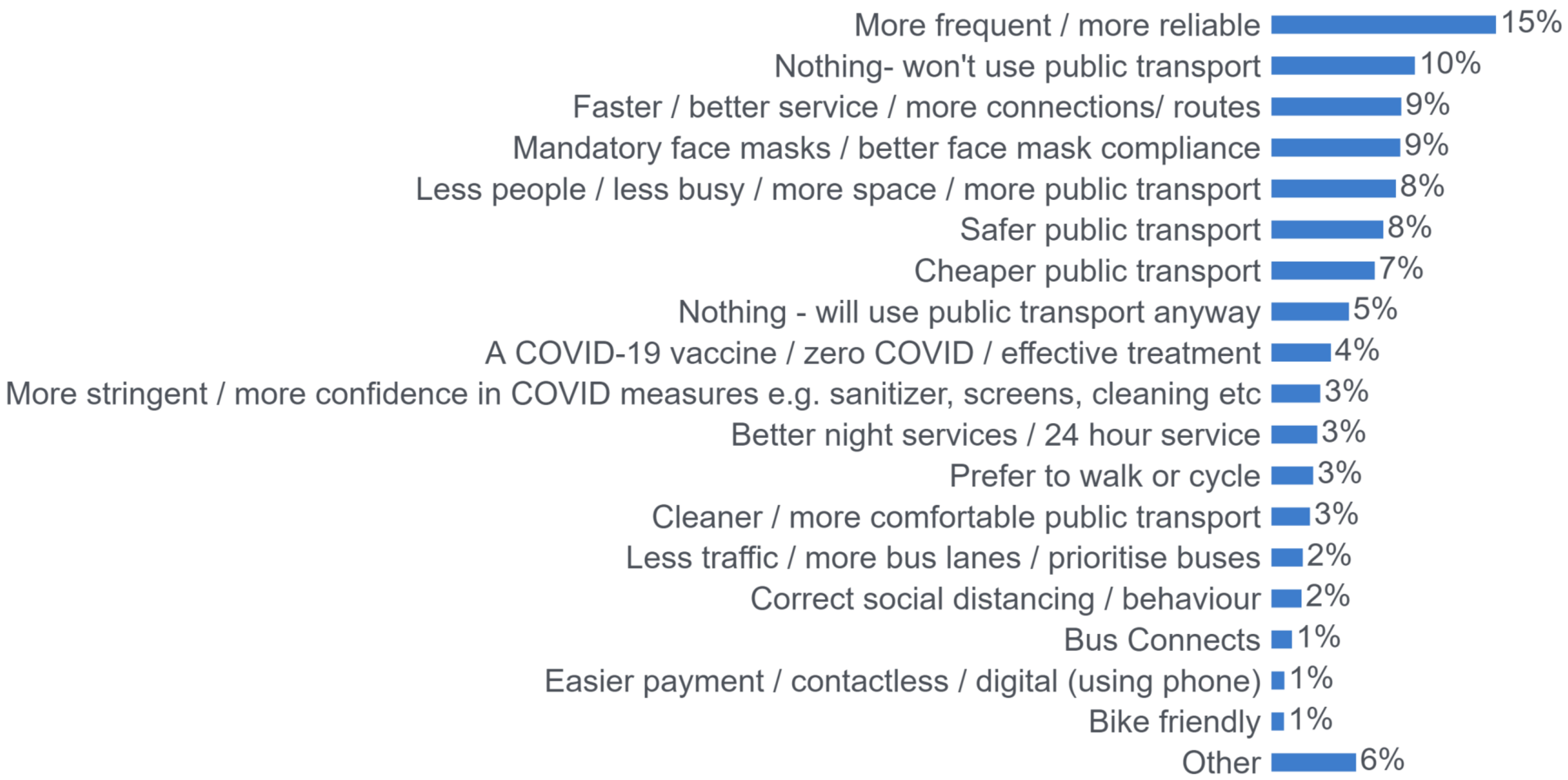
What would encourage you to engage in each of these activities more in a post-COVID world? - Using public transport

coded verbatim comments, % first mentions



sample size: 636

Encouraging Using Public Transport - Lapsed Users

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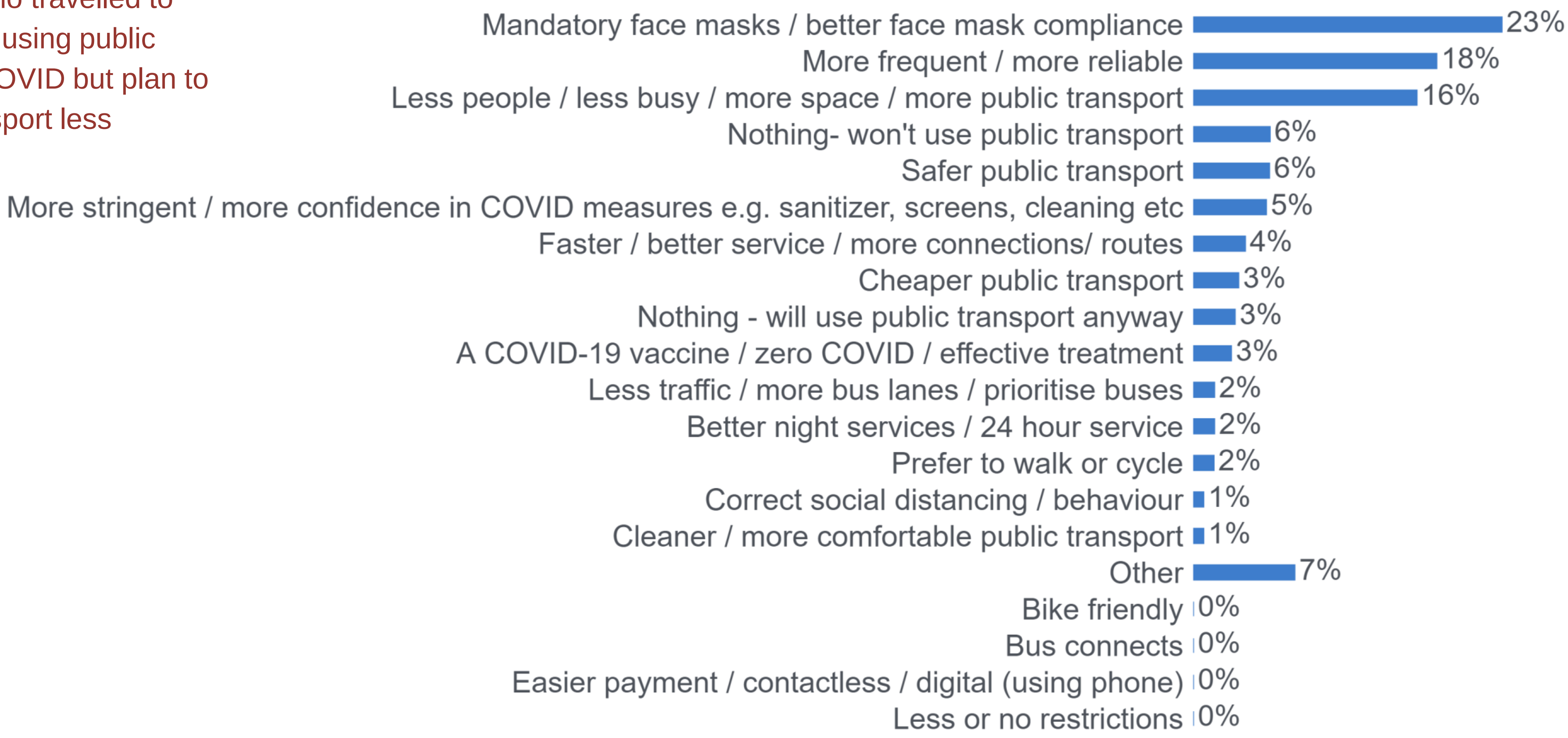
What would encourage you to engage in each of these activities more in a post-COVID world? - Using public transport

coded verbatim comments, % first mentions

Base - those who travelled to work or college using public transport pre-COVID but plan to use public transport less



Public Transport and Using public transport - Will do less often sample size: 89

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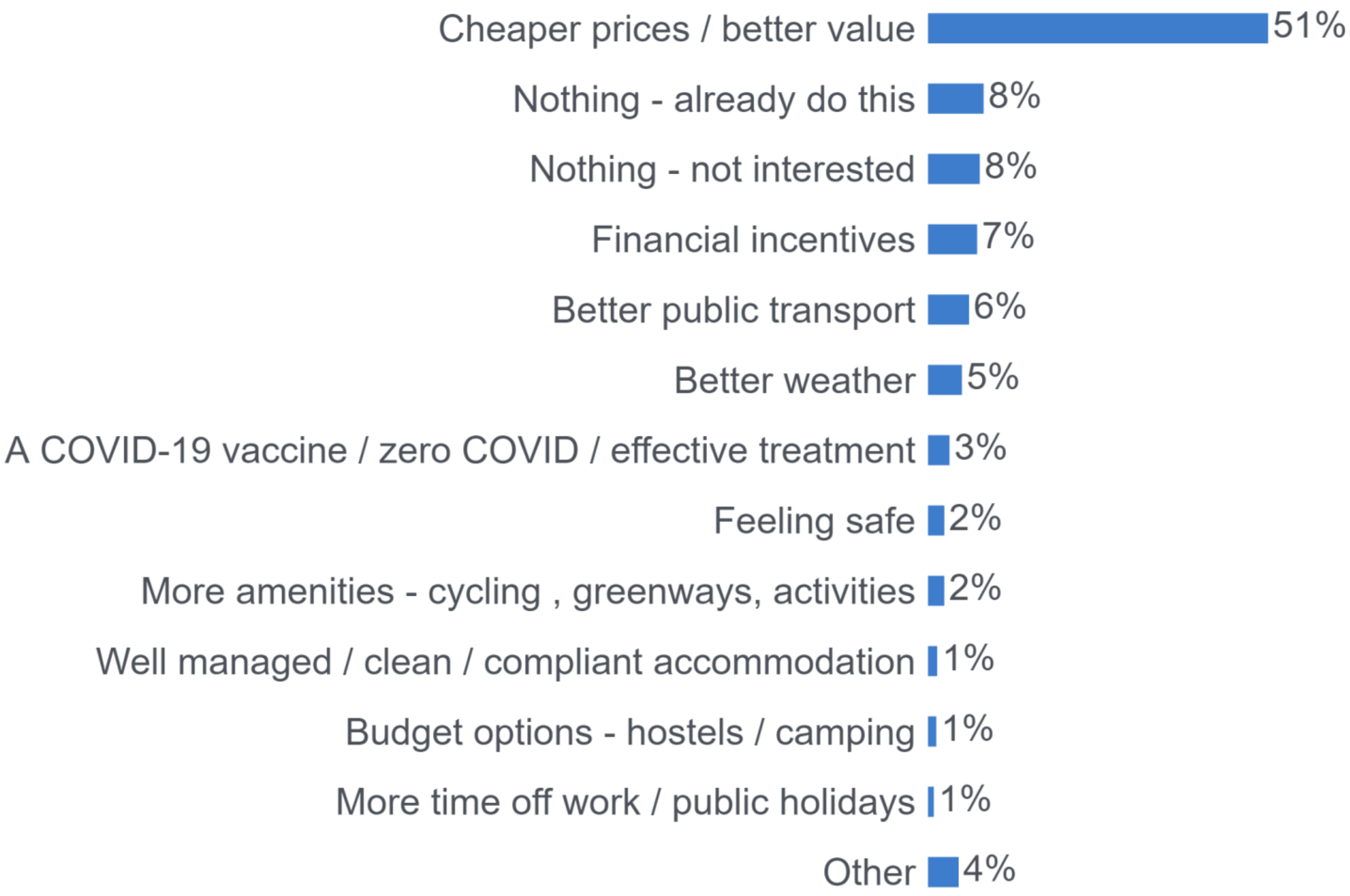
What would encourage you to engage in each of these activities more in a post-COVID world? - Staycation in Ireland (outside Dublin)

coded verbatim comments, % first mentions



sample size: 339

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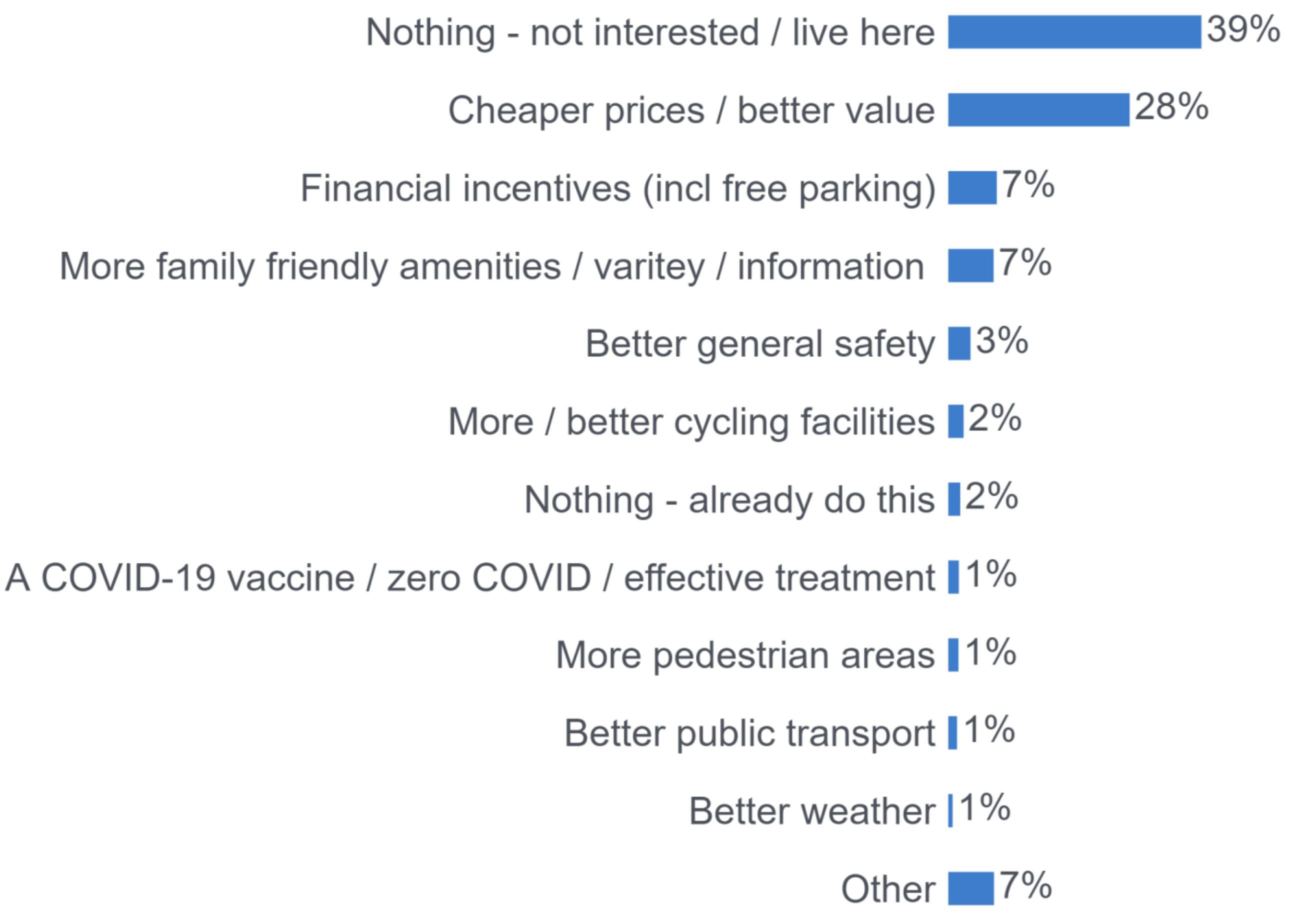
What would encourage you to engage in each of these activities more in a post-COVID world? - Staycation Dublin

coded verbatim comments, % first mentions



sample size: 541

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As the economy emerges from the pandemic restrictions, please rank what you think **should** and **will** be the priorities for retail businesses

Should be:

highest priority

1. Taking all possible measures to ensure public health
2. Restoring employment levels to pre-pandemic levels
3. Returning to business in a more environmentally friendly way
4. Offering sales / discounts to encourage people back to the shops
5. Using digital tools to enhance the shopping experience
6. Returning to pre-pandemic turnover / sales levels as quickly as possible

lowest priority

Will be:

1. Returning to pre-pandemic turnover / sales levels as quickly as possible
2. Offering sales / discounts to encourage people back to the shops
3. Taking all possible measures to ensure public health
4. Using digital tools to enhance the shopping experience
5. Restoring employment levels to pre-pandemic levels
6. Returning to business in a more environmentally friendly way

sample size: 912

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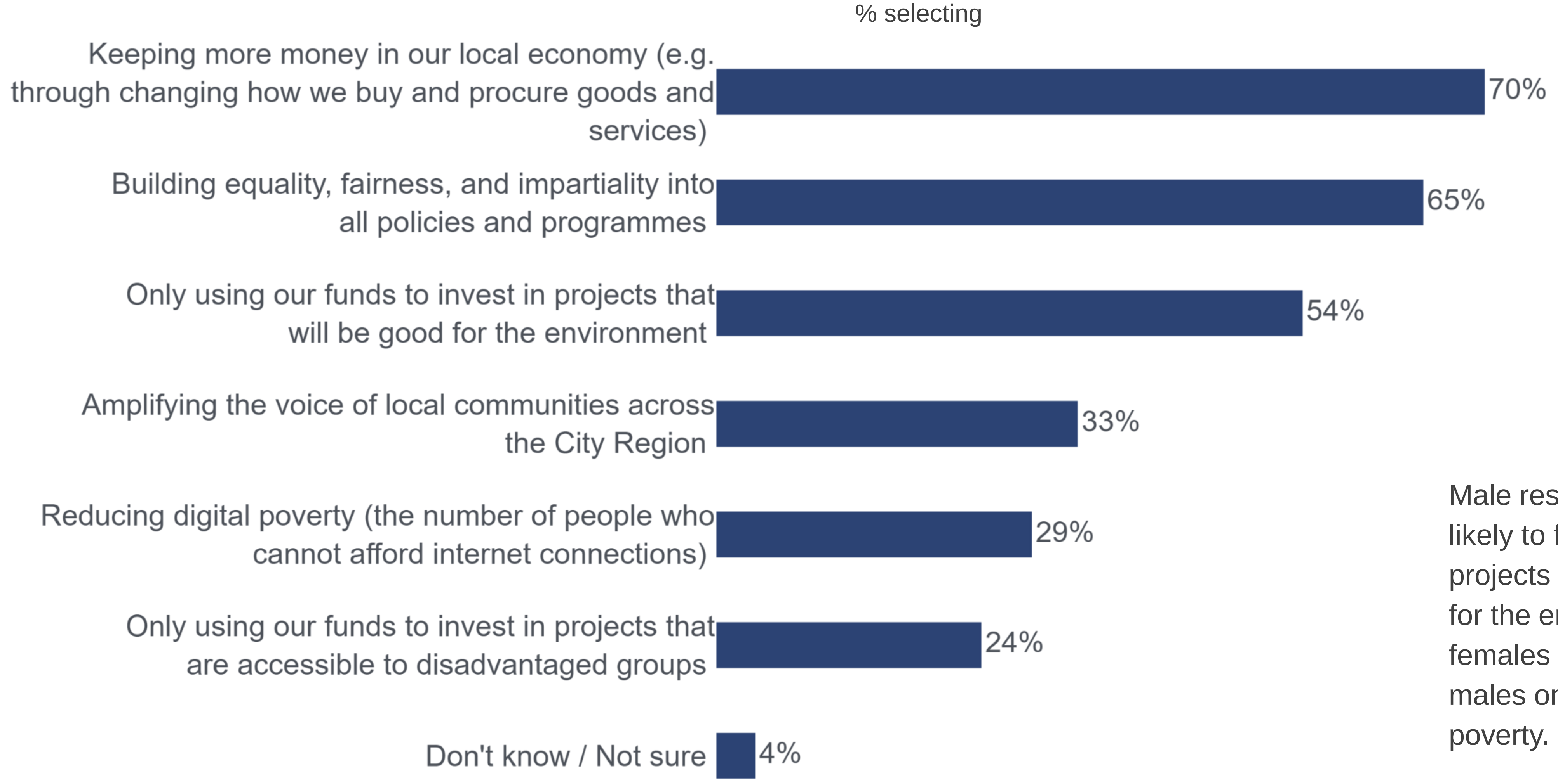
Please select up to 3 "Build Back Better" initiatives / programmes that you feel are most important for the recovery as we rebuild after the pandemic.



Male respondents were more likely to favour investment in projects that would be good for the environment, while females were keener than males on reducing digital poverty.

sample size: 951

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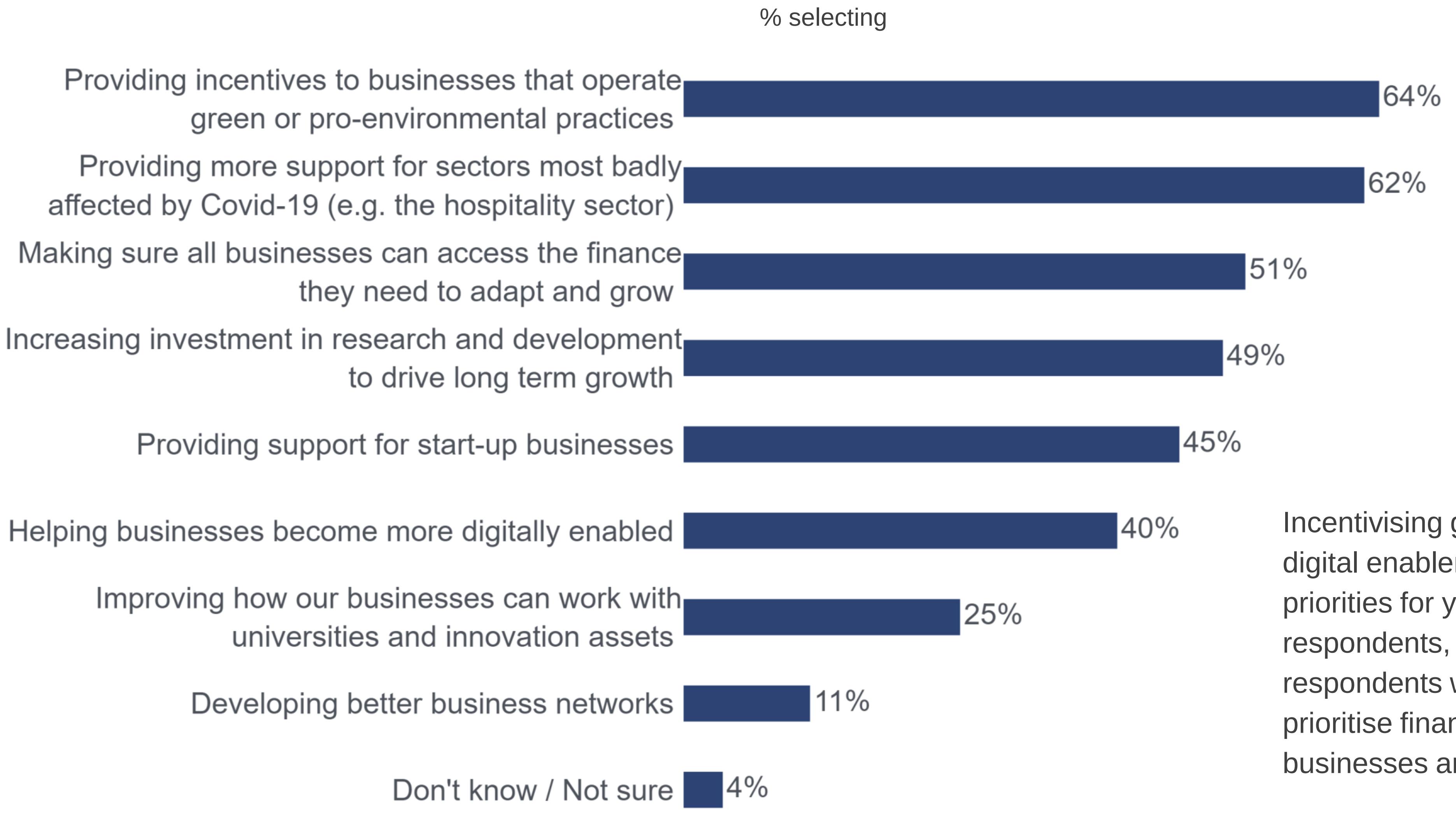
Please select up to 4 Business Ecosystem initiatives / programmes that you feel are most important for our recovery.



Incentivising green practices and digital enablement were higher priorities for younger respondents, while older respondents were more likely to prioritise finance for existing businesses and start-ups

sample size: 949

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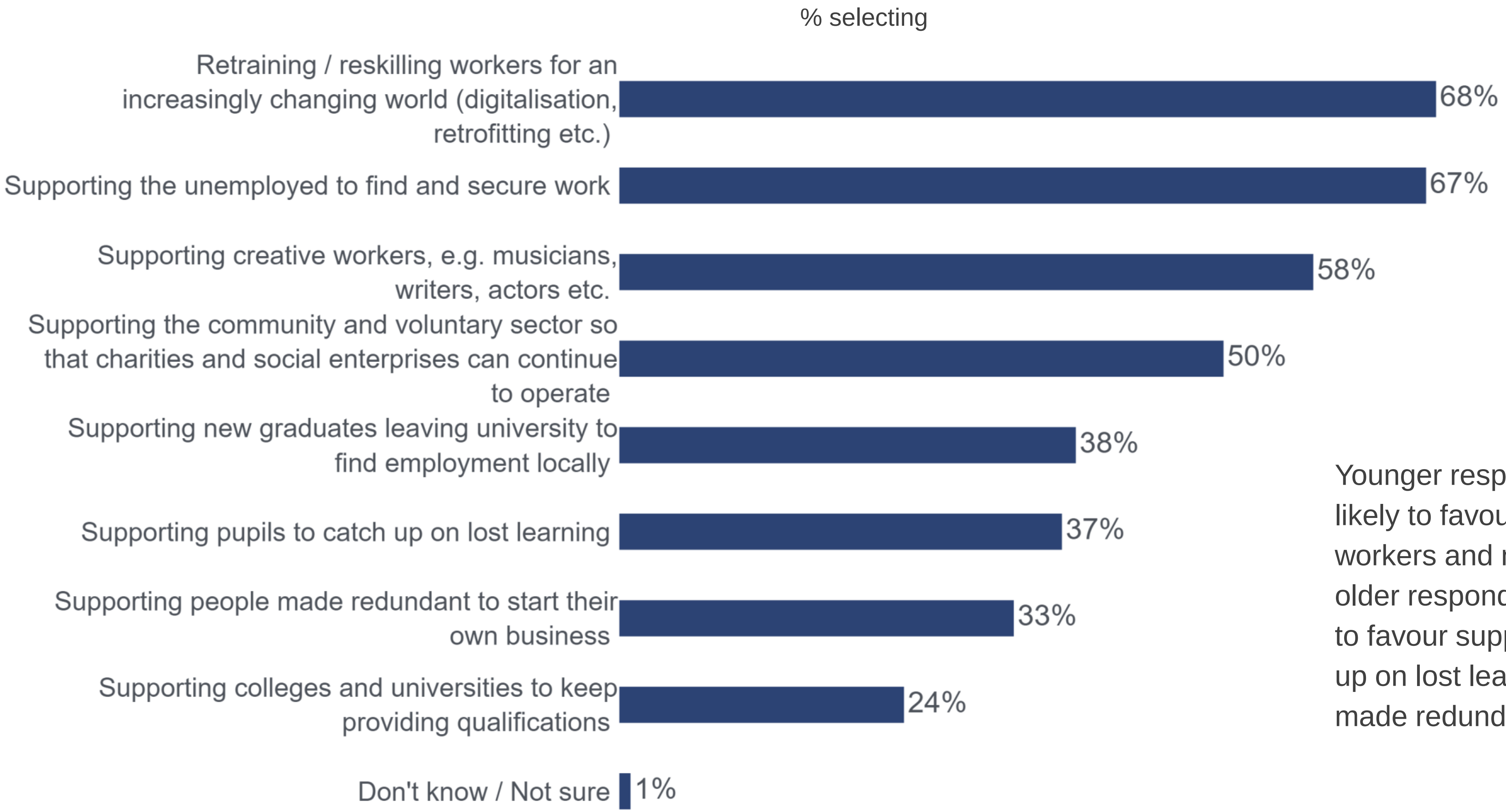
Please select up to 4 People initiatives / programmes that you feel are most important for our recovery.



Younger respondents were more likely to favour support for creative workers and new graduates, while older respondents were more likely to favour support for pupils to catch up on lost learning and for those made redundant.

sample size: 949

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Please select up to 3 Place initiatives / programmes that you feel are most important for our recovery.

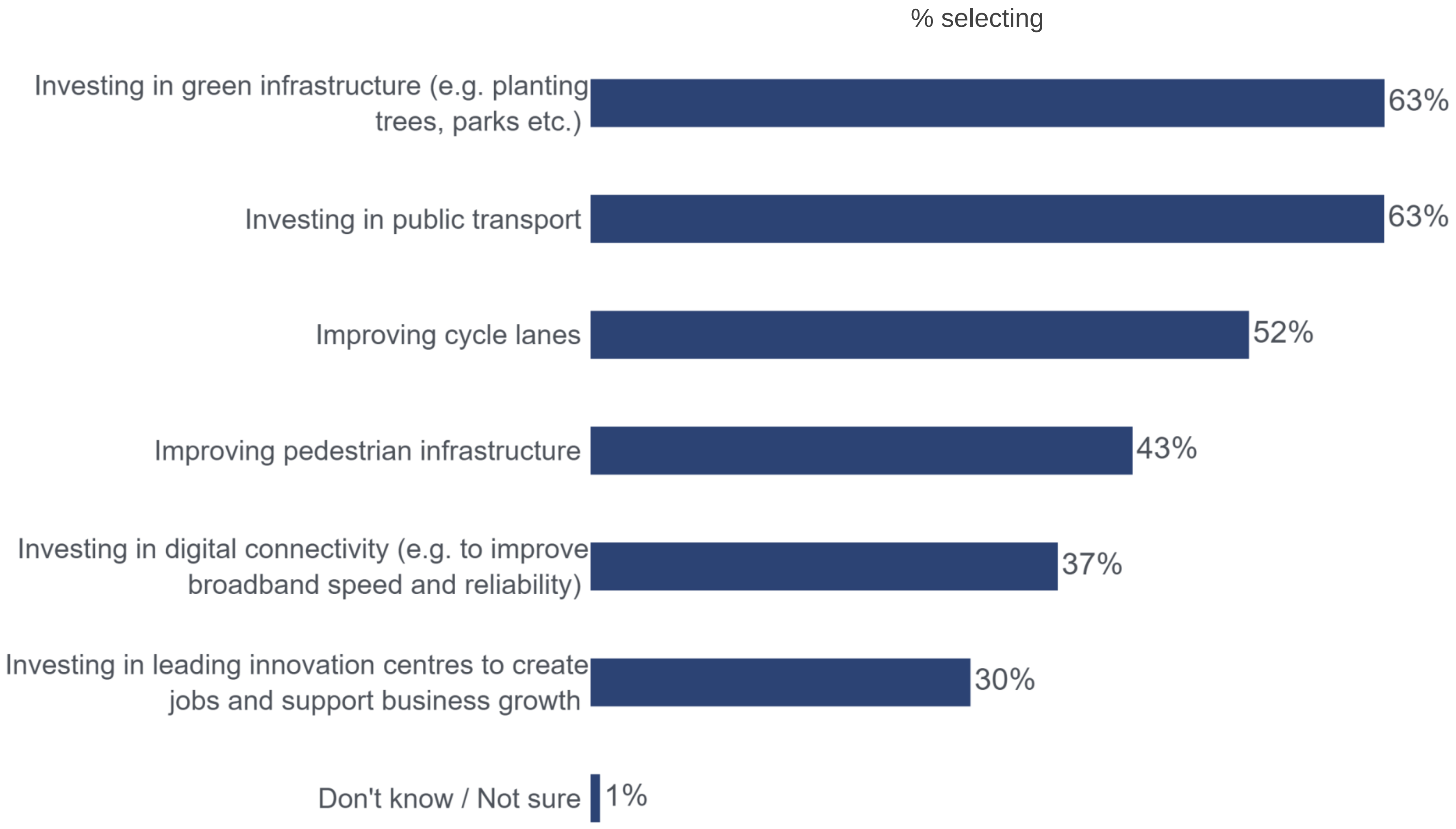
% selecting

Younger respondents were more likely to favour providing more residential accommodation in the city centre, supporting local events and venues, and repurposing outdoor spaces for social distancing requirements.

Older respondents were more likely to favour supporting the tourism and visitor sector.

sample size: 950

Please select up to 3 Infrastructure initiatives / programmes that you feel are most important for our recovery.



Younger respondents were more likely to favour investing in green infrastructure and improving cycle lanes. Over 50s were more likely to favour investing in innovation centres.

35 to 49 year-olds were less favourable than other age groups towards investing in public transport.

sample size: 951

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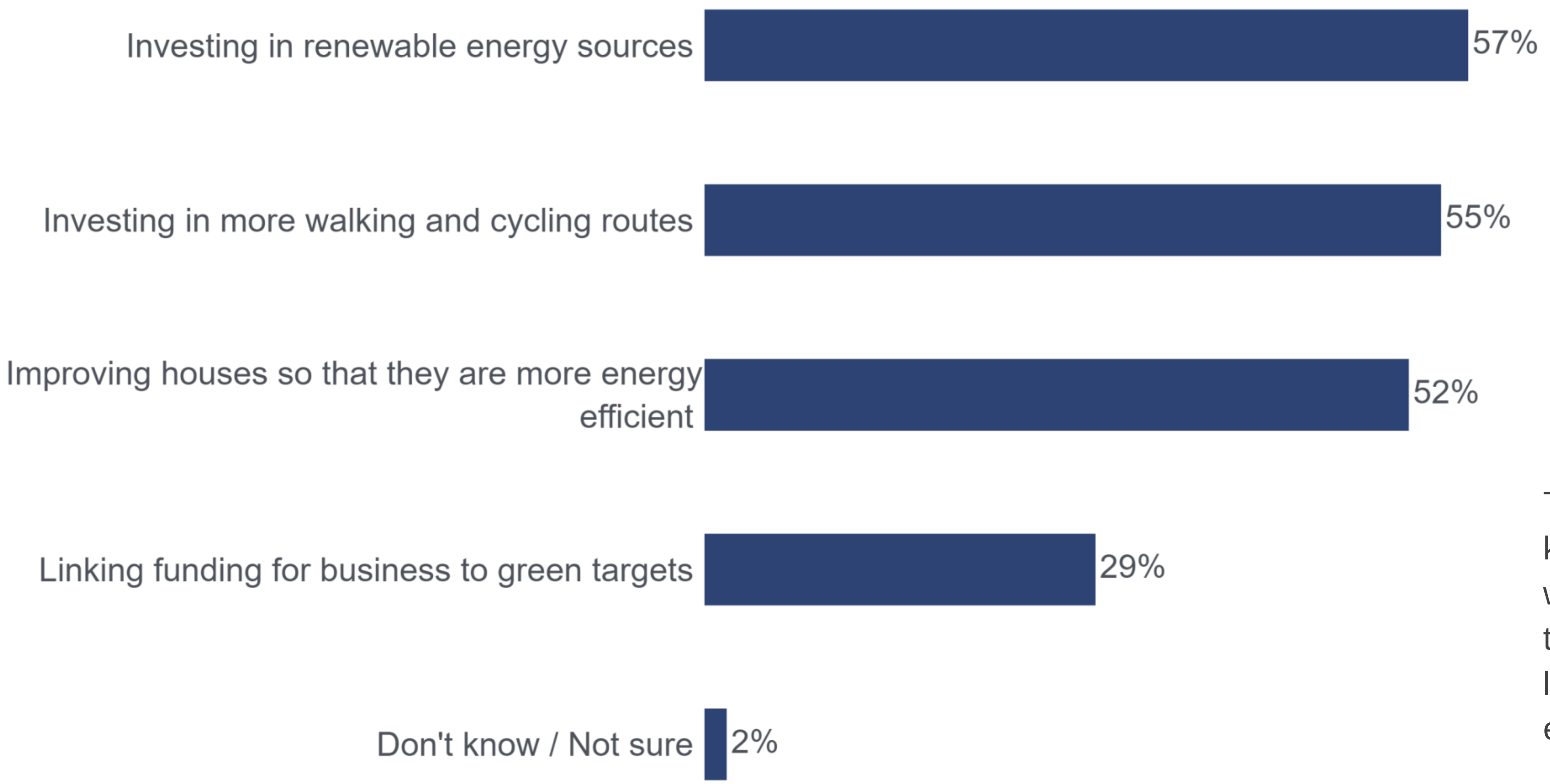
Please select up to 2 Green Recovery initiatives / programmes that you feel are most important for our recovery.

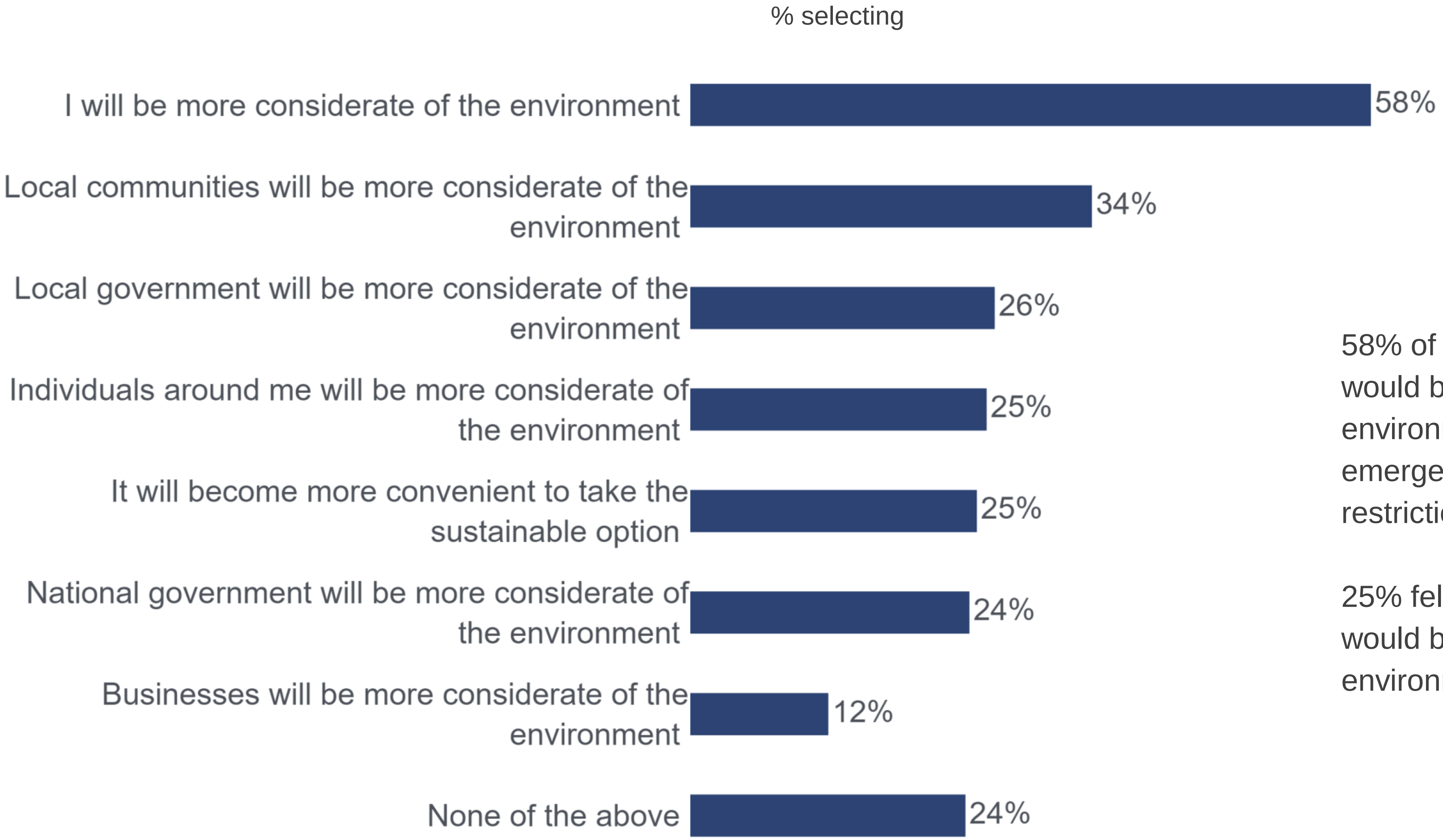
% selecting



Those aged under 50 were keener on investing in more walking and cycling routes, while those aged over 50 were more likely to prioritise improving the energy efficiency of houses.

sample size: 950

As the economy emerges from the pandemic restrictions, which of the following do you think will be true? Please select as many as apply.



58% of respondents felt that they would be more considerate of the environment as the economy emerges from the pandemic restrictions.

25% felt that individuals around them would be more considerate of the environment.

sample size: 947

Agenda

Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

What would you like to see businesses do more of, or do in a new way, as they emerge from the pandemic restrictions?

verbatim comments coded

Female respondents were more likely to mention adherence to guidelines and support for remote working than males.

Older respondents were more likely to mention improved customer service.

sample size: 634

Word Cloud - Would Like to See from Business

Comhairle Cathrach Bhaile Átha Cliath
Dublin City Council

What would you like to see businesses do more of, or do in a new way, as they emerge from the pandemic restrictions?

sample size: 634

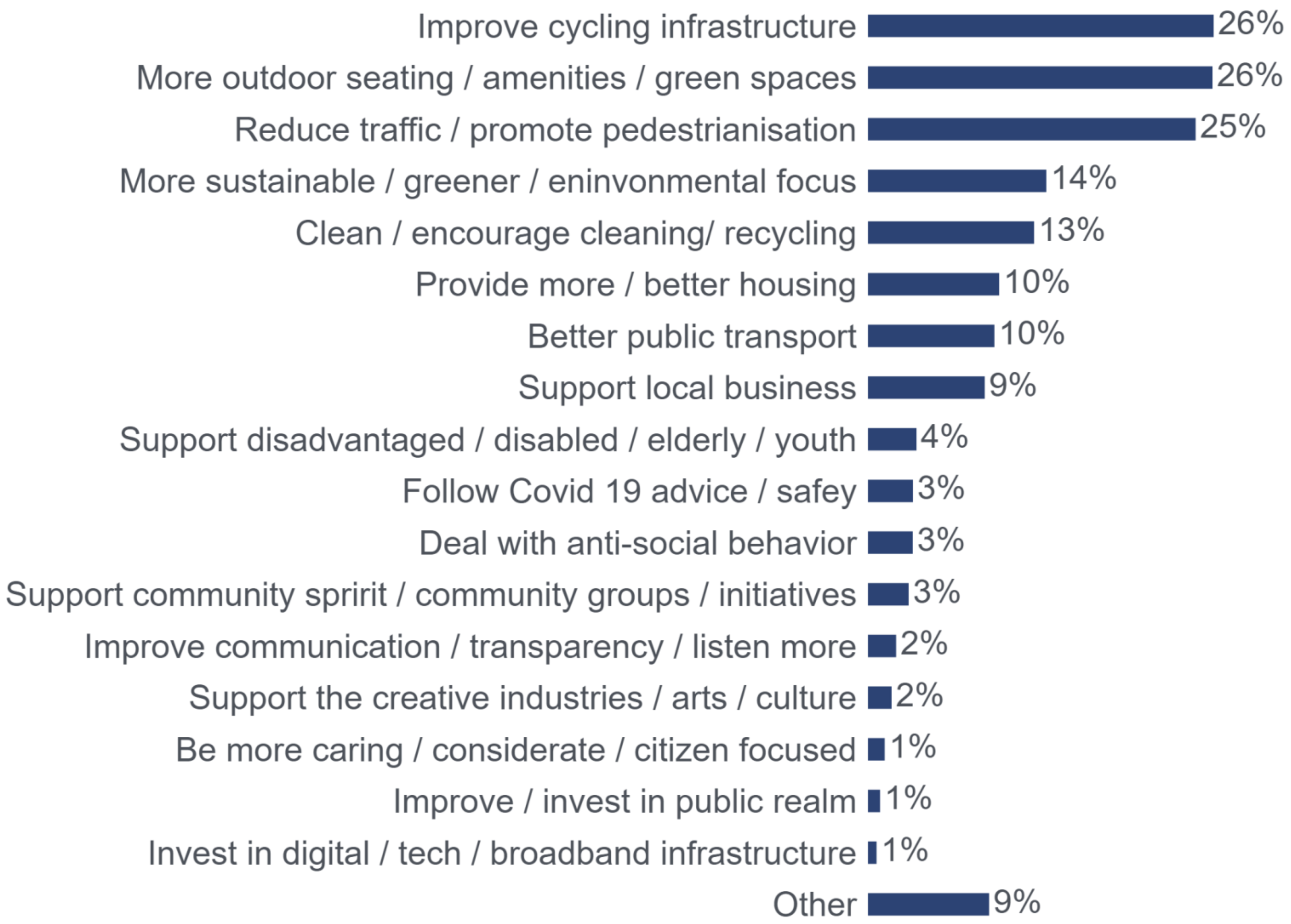
Agenda

Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

Would Like to See from Your Local Authority

What would you like to see your local authority do more of, or do in a new way, as communities emerge from the pandemic restrictions?

verbatim comments coded



Male respondents and younger respondents were more likely to mention improved cycling infrastructure and reduced traffic.

sample size: 735

Word Cloud - Would Like to See from Your Local Authority

Comhairle Cathrach Bhaile Átha Cliath
Dublin City Council

What would you like to see your local authority do more of, or do in a new way, as communities emerge from the pandemic restrictions?

sample size: 735

Agenda

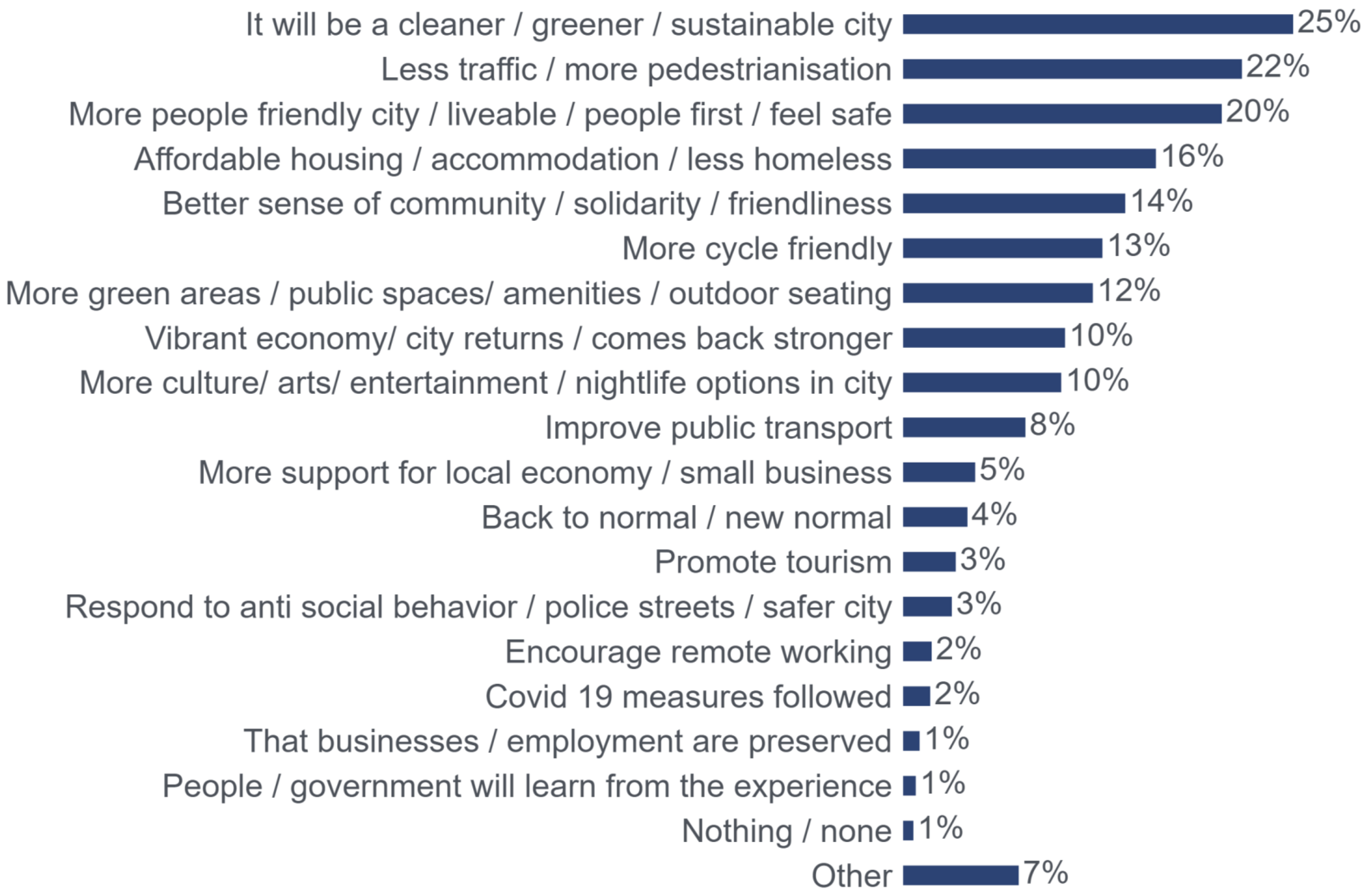
Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

Hopes for Dublin

Comhairle Cathrach Bhaile Átha Cliath
Dublin City Council

What are your hopes for Dublin as the city emerges from the pandemic restrictions?

verbatim comments coded



Female respondents and those aged under 35 were more likely to mention affordable housing and more green areas.

sample size: 768

Word Cloud - Hopes for Dublin

What are your hopes for Dublin as the city emerges from the pandemic restrictions?

sample size: 768

Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

END

For further information please contact:

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