Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

Your Dublin, Your Voice Retail Survey December 2018

YOUR DUBLIN YOUR VOICE
DUBLIN OPINION PANEL

Executive Report

Survey reference period: December 2018

Report by Delve Research
Survey Research & Analysis

www.delve-research.com

Agenda

Comhairle Cathrach Bhaile Átha Cliath
Dublin City Council

Summary

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Shopping & Socialising in Dublin

- 89% of respondents felt that Dublin has a vibrant city centre – up from 81% in 2011
- 81% like to go out and socialise in Dublin – similar to 2011
- 74% enjoy shopping in Dublin – similar to 2011

Range of Restaurants and Shops

- 93% agreed that Dublin has a good range of high quality restaurants – up from 87% in 2011
- 70% agreed that Dublin has a wide selection of unique shops and independent retailers – up from 62% in 2011

Safety in the City

- 72% feel safe in Dublin city centre during the day – down from 77% in 2011
- 38% feel safe in Dublin city centre at night – similar to 2011

Summary

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Dublin City Council

Suggestions for Improving the Shopping Experience in Dublin

- 14% of suggestions related to “More pedestrian friendly / less traffic” – up from 7% in 2011

	2018	2011
Suggestion	% first mentions	% first mentions
More pedestrian friendly / Less traffic	14%	7%
Improve safety (begging / drinking / drugs)	13%	13%
Better / cheaper public transport	11%	11%
Cheaper / free parking	11%	18%
Cheaper prices / better value / offers	8%	6%
More support for smaller / local / Irish stores	7%	9%
Cleaner city centre / revamp areas (esp O'Connell St)	5%	5%
Better customer service / more personal	5%	4%
Improve footpaths / roads / public realm / less clutter	4%	-
Improve amenities (seating / parks / toilets)	3%	4%
Accessibility / ease of getting in and out	3%	0.5%
More cycle friendly	2%	3%

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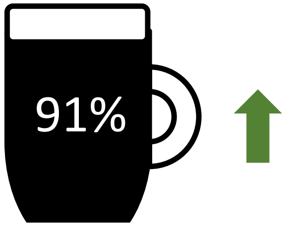
Experience of Shopping & Socialising in Dublin

- 78% rated the experience of shopping in Dublin as good or excellent – up from 72% in 2011*

Spend skews towards city centre for books and clothes, suburbs for household durables. Personal electronics spend skews towards suburbs and online

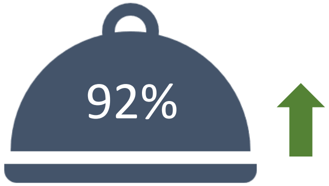
- 91% rated the experience of going to the pub in Dublin as good or excellent – up from 83% in 2011
  - 48% go to the pub at least once a month

Skews towards the city centre for younger, suburbs for older



- 92% rated the experience of eating out in Dublin as good or excellent – up from 86% in 2011
  - 59% eat out at least once a month

Skews towards the city centre for younger, suburbs for older



*2011 figure relates to “clothes / fashion” shopping only

Summary

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Current Spend

- 27% said they were spending more on shopping than this time last year, 19% said less

Highest increase among males and among under 34s

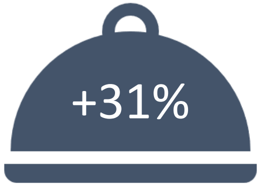
- 18% said they were spending more on going to the pub than this time last year, 40% said less

In 2011 64% said that they were spending less going to the pub

- 31% said they were spending more on eating out than this time last year, 24% said less

In 2011 55% said that they were spending less eating out

31% of females spending less dining out than last year

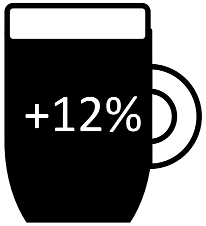


Summary

Future Spend

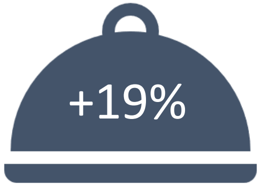
- Future spend on shopping - 15% anticipate spending more in the next 12 months, 70% about the same, and 15% anticipate spending less on shopping

- Future spend going to the pub - 12% expect to spend more in the next 12 months, 63% about the same, and 25% expect to spend less going to the pub



- Future spend eating out – 19% expect to spend more eating out, 63% about the same, and 19% expect to spend less

30% of those with in lower disposable income bracket expect to spend less eating out



Summary

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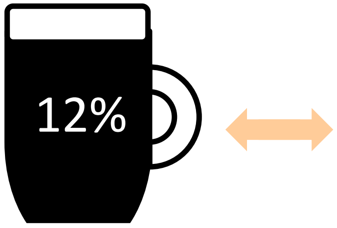
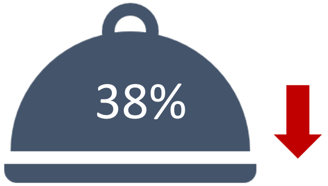
Value for Money

- 34% rated value for money of shopping in Dublin as good or great

- 12% rated value for money of going to the pub in Dublin as good or great – similar to 2011

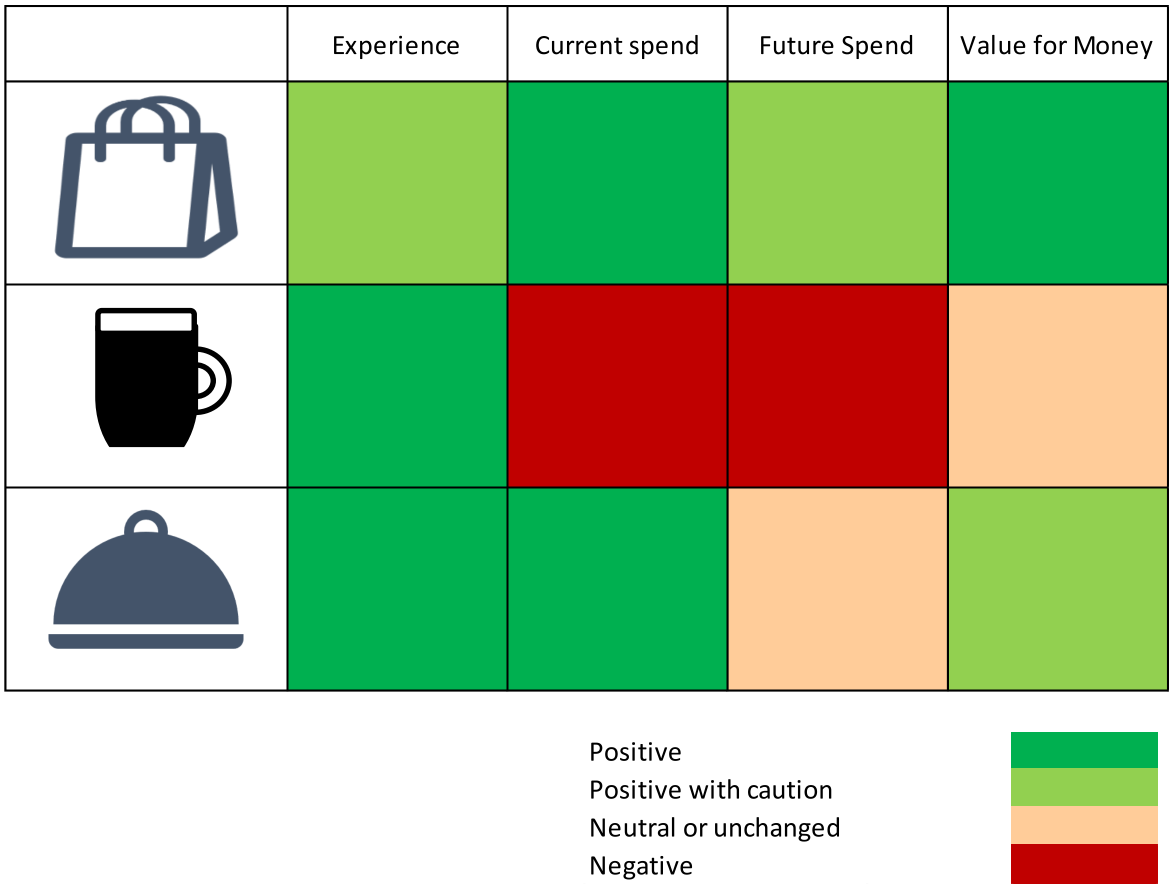


- 30% rated value for money of eating out in Dublin as good or great – down from 38% in 2011



*2011 figure relates to "clothes / fashion" shopping only

Experience, Current Spend, Future Spend, Value for Money



Summary

Appeal of Areas

- "Grafton Street & Environs", "Dame / Camden / Wexford / Sth Gt George's St", "Henry Street & Environs" were the most appealing areas for shopping and socialising

- All areas registered lower appeal than in 2011, the biggest drop was for Docklands, with 13% finding the area appealing - down from 39% in 2011. Other notable drops were for Temple Bar at 23%, down from 43%; and O'Connell Street at 21%, down from 36%

- Grafton Street's appeal rises with education level and income level

- Dame / Camden / Wexford / Sth Gt George's St is more appealing to younger respondents, those at work, and those with higher education

- Henry Street is more appealing among those aged over 65

Summary

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Factors Influencing Where You Shop

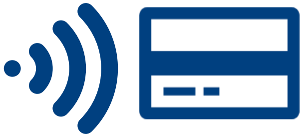
	Rank in 2018		Rank in 2011
Good choice of shops / range of good stores	1		1
Good prices / Good value for money	2		2
Pedestrianised streets / attractive environment	3		5
Close to home / convenient	4		3
Good / Cheap Public Transport	5		7
Free / cheap parking	6		4
Ease of parking	7		6
Close to work	8		9
Family friendly	9		8
How well technology is used to make a better shopping experience	10		not asked

The top 2 influencing factors remain “Good choice of shops / range of good stores” and “Good prices / Good value for money”

The relative importance of “Pedestrianised streets / attractive environment”, “Good / cheap public transport” and “Close to work” have increased since 2011

Use of loyalty mechanisms and payment tech

- 81% of respondents have paid for goods or services by tapping with a card



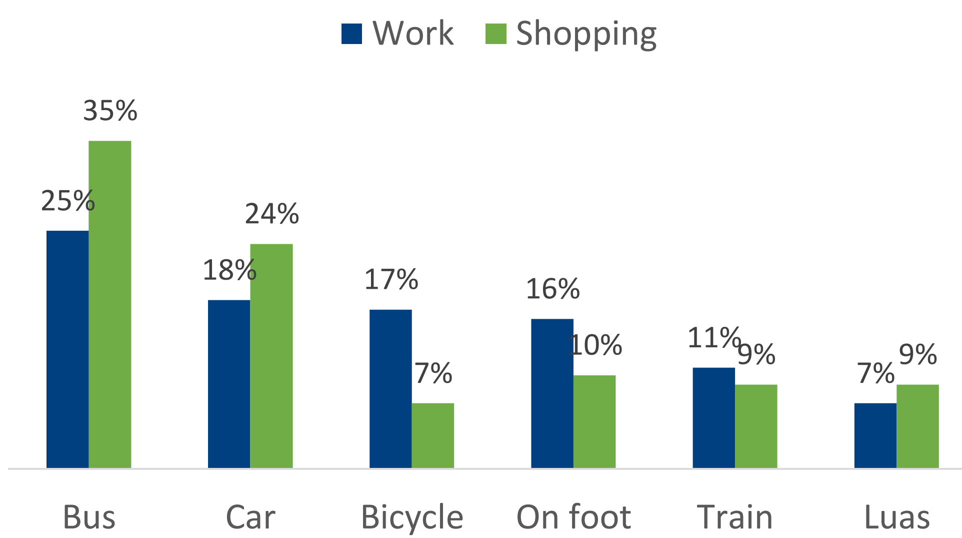
- Adoption of mobile payment (Apple Pay / Android Pay) is at 14%, relatively high by international standards

Summary

Getting Into the City Centre

- Bus brings 25% of workers to the city centre
- Bus brings 35% of shoppers to the city centre
- Public transport combined brings 43% of workers and 53% of shoppers to the city centre
- 73% found it easy to get into the city centre – down from 82% in 2011
- 85% of over 65s found it easy to get into the city centre

Q. In general, how do you usually get in to Dublin city centre for...



Getting Around the City Centre

- 67% found it easy to get around the city centre – down from 72% in 2011
- Females (73%) find it easier to get around the city centre than males (60%)

*"living in city centre" not included on chart

Summary

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Pleasant City Centre

- 49% agree that Dublin City Council does a good job of maintaining a pleasant city centre
- Large proportion of “neither agree or disagree” (27%) indicates scope for publicity around Dublin City Council’s role in delivering a pleasant city centre
- Among those agreeing – 60% cited cleanliness or similar as their reason
- Among those disagreeing – 30% cited litter or similar as their reason

Litter / cleanliness is the main driver of perception of Council maintaining a pleasant city centre

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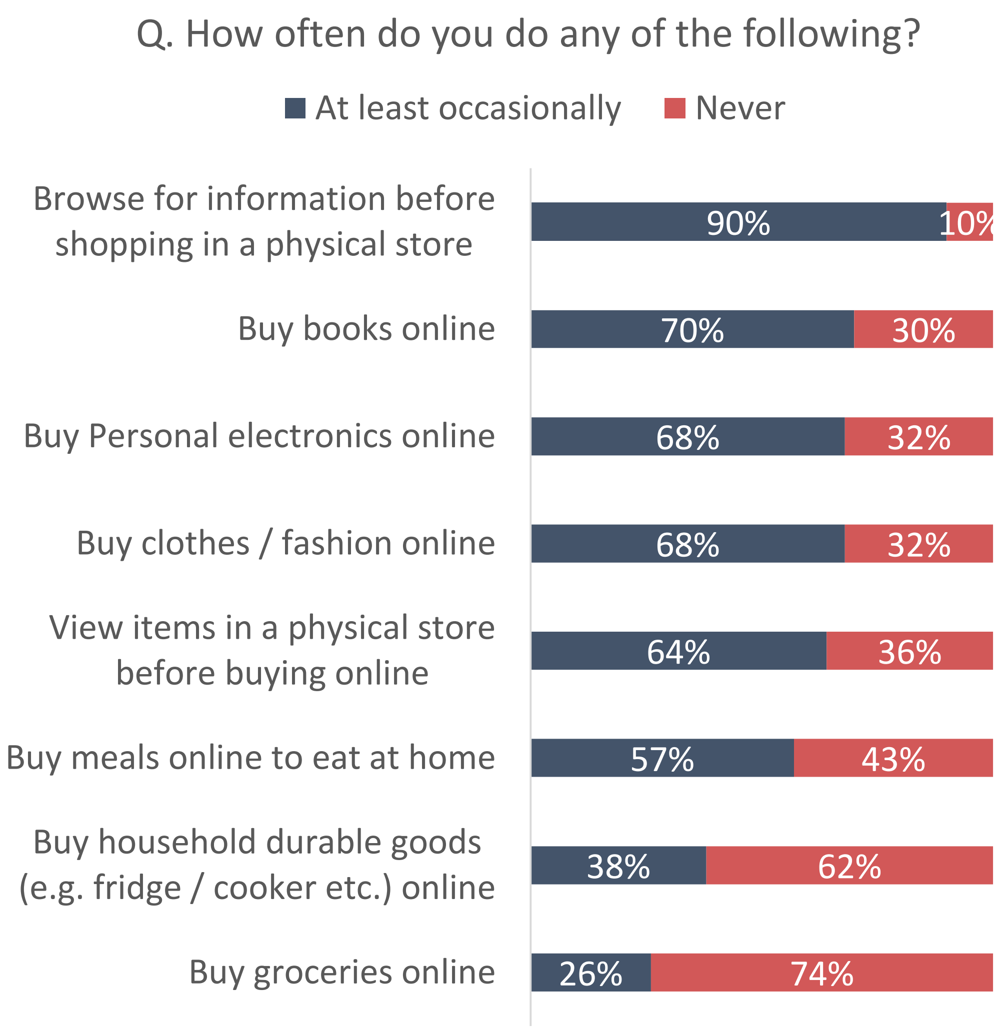
Online Shopping and Browsing



Online shopping behaviour tends to be higher among younger age groups, among the more educated, among those with children, and among the tech savvy

Engaging in the various online shopping behaviours does not vary by income level

Agenda

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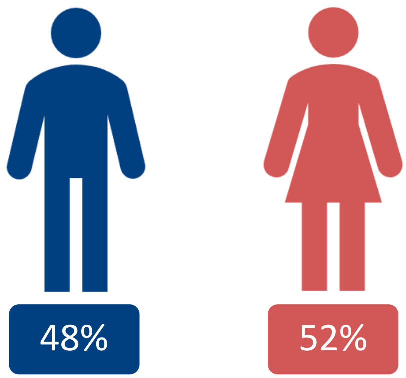
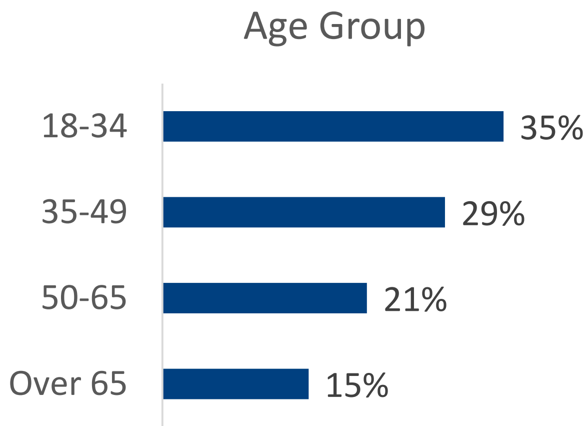
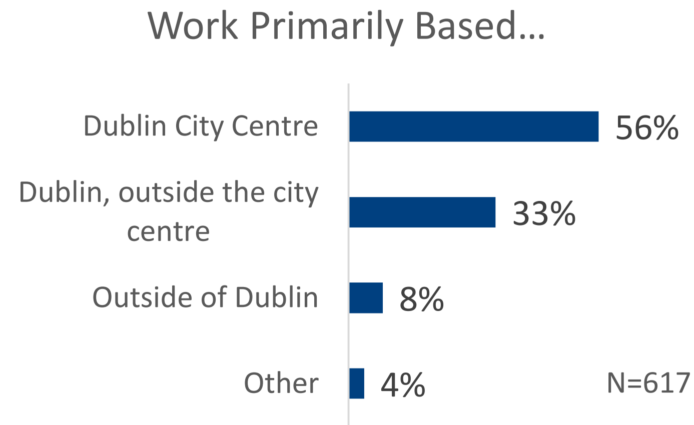
Background to this survey

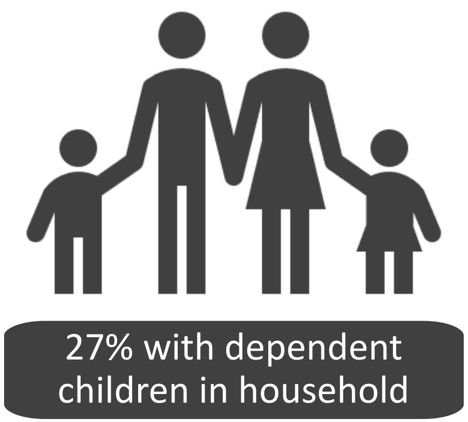
- Online survey, 6th December – 22nd December 2018
- 858 respondents, from "Your Dublin, Your Voice" opinion panel
- 23% response rate
- Global margin of error = +/- 3.3%
- Robust panel in existence since 2010, recruitment through various channels
- New members can join at bit.ly/ydyvreg

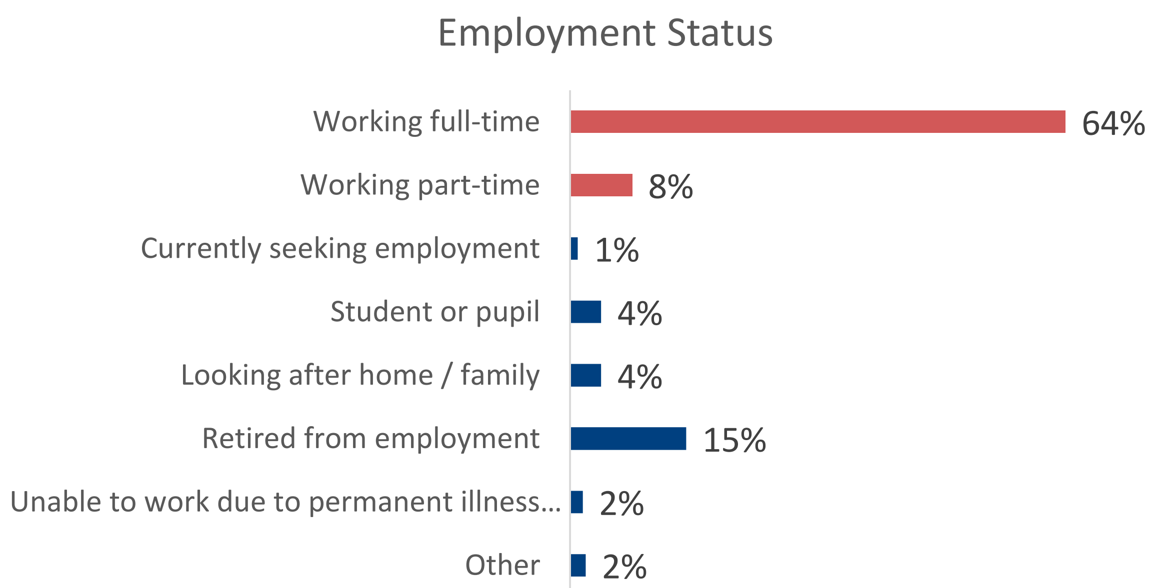
Respondent Profile











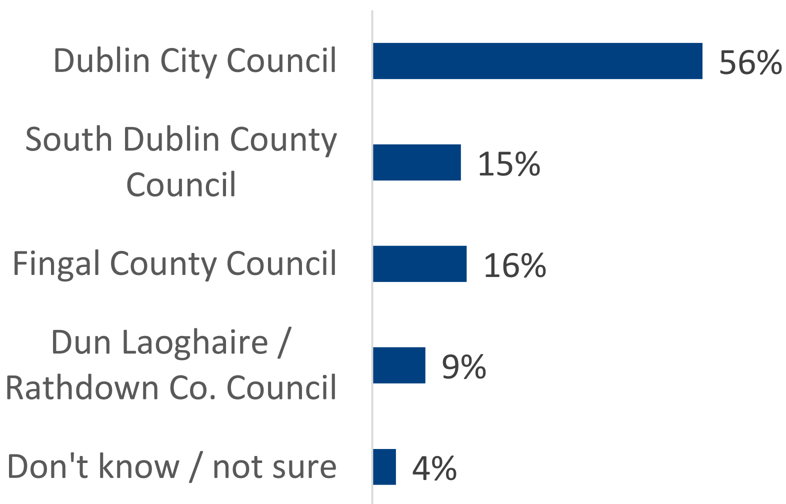
Principal results are statistically adjusted to match census data by gender and age group

N=858

Respondent Profile

31 nationalities represented on this survey
89% Irish

Local Authority



Current Area of Residence

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

N=858

Respondent Profile

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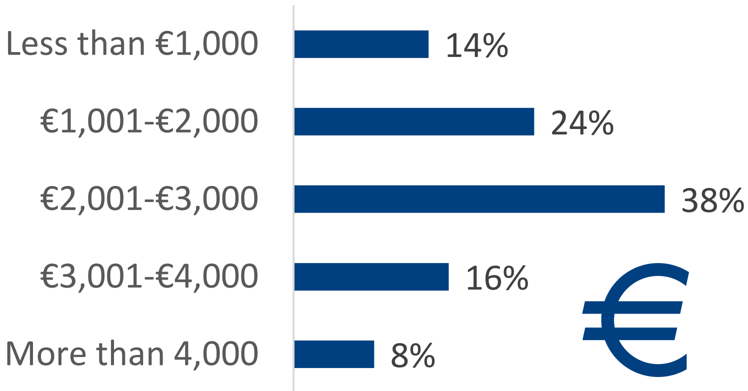
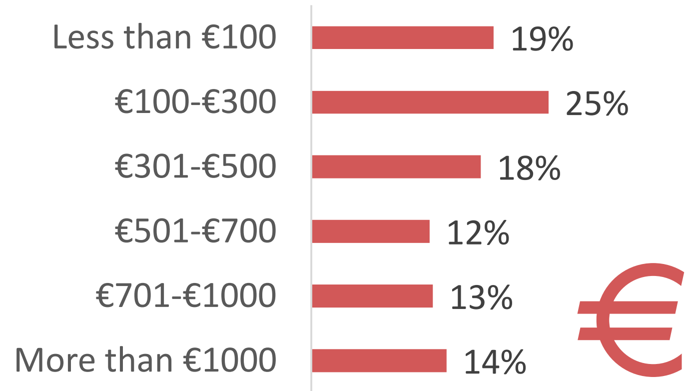
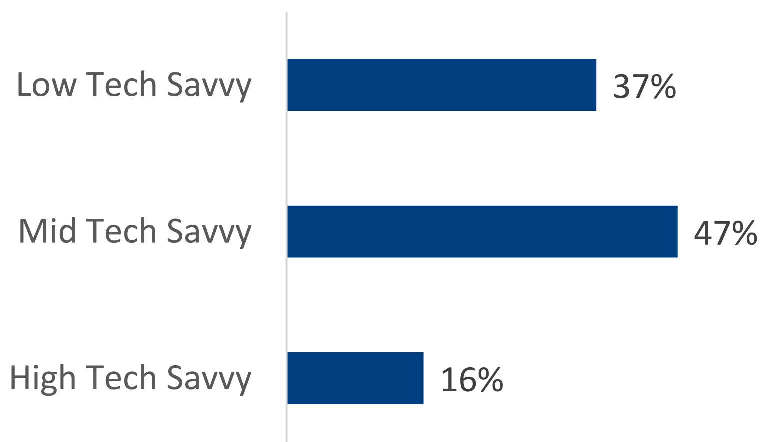
Monthly Income After Taxes, Before Bills Are Paid



Monthly Disposable Income After Bills Are Paid



Tech Savvy Profile



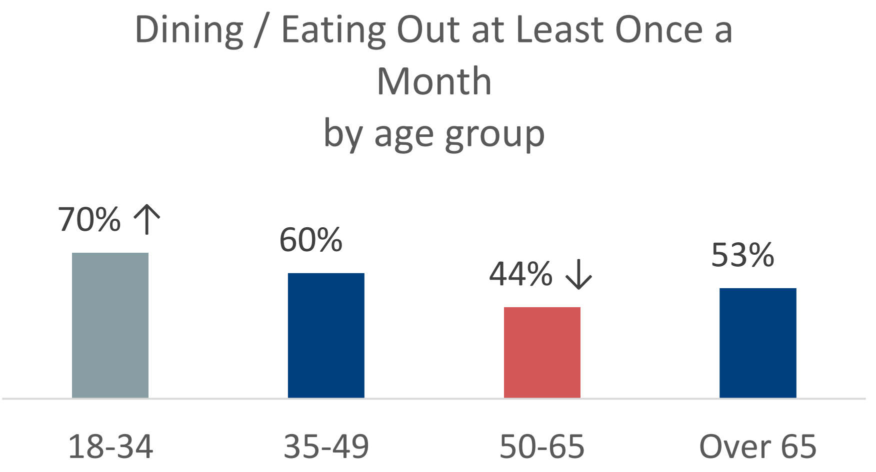
Based on ownership of selected tech products / services

N=858

Reporting conventions

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

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Ever Do in Dublin City or Greater Dublin

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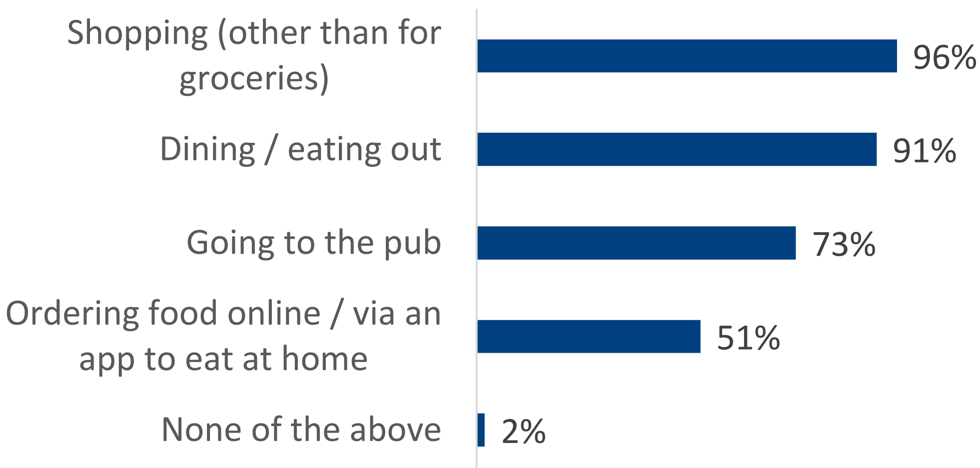
Dublin City Council

Q. Do you ever do any of the following in Dublin City or in the greater Dublin area?



All activities higher among 35-49 year-olds

Ordering Food Online highest among 18-34 year-olds (66%)

Going to the Pub higher among those in employment (79%)

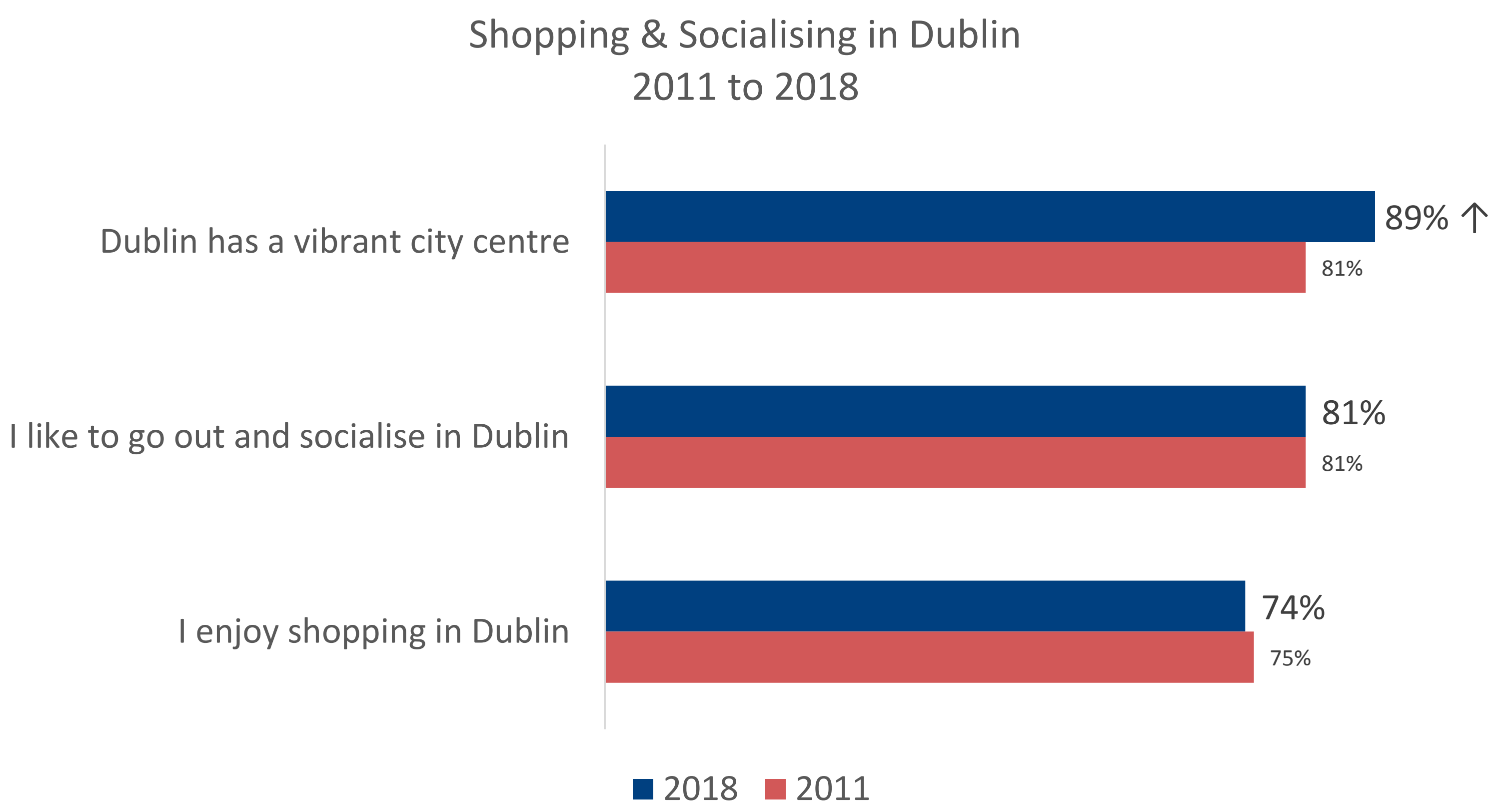
Eating Out increases with education level

Going to the Pub and Eating Out lower among those with dependent children

Going to the Pub and Eating Out lower among lower income earners

N=858

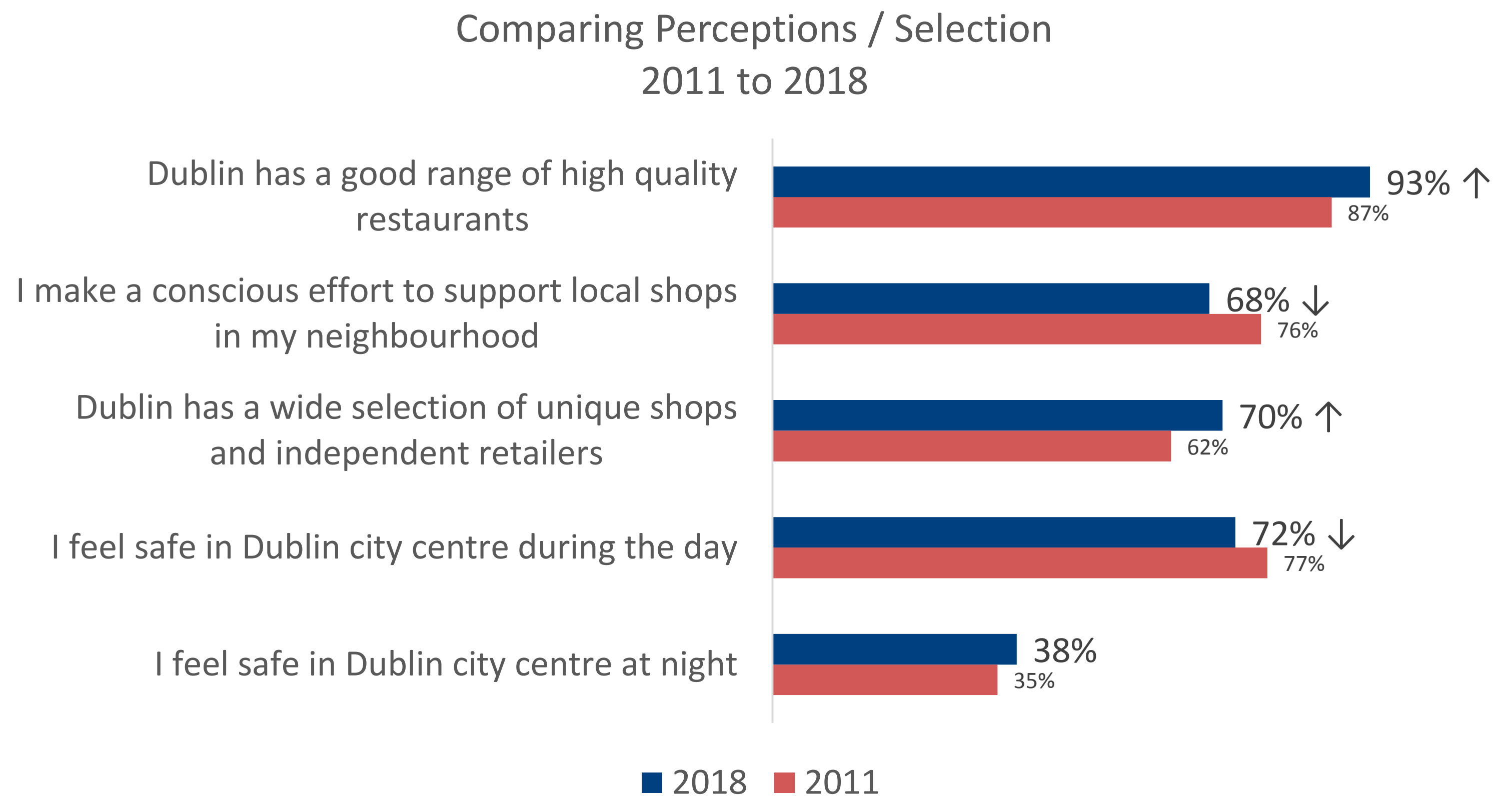
Perceptions & Sentiment - Shopping & Socialising



The city centre is perceived as more vibrant now than in 2011

2018 N=821+
2011 N=1898+

Comparing Perceptions / Selection



The perception of range of high quality restaurants and unique shops has increased since 2011

Feeling safe in the city during the day has fallen since 2011

2018 N=786+
2011 N=1898+

Comparing Experience of Socialising

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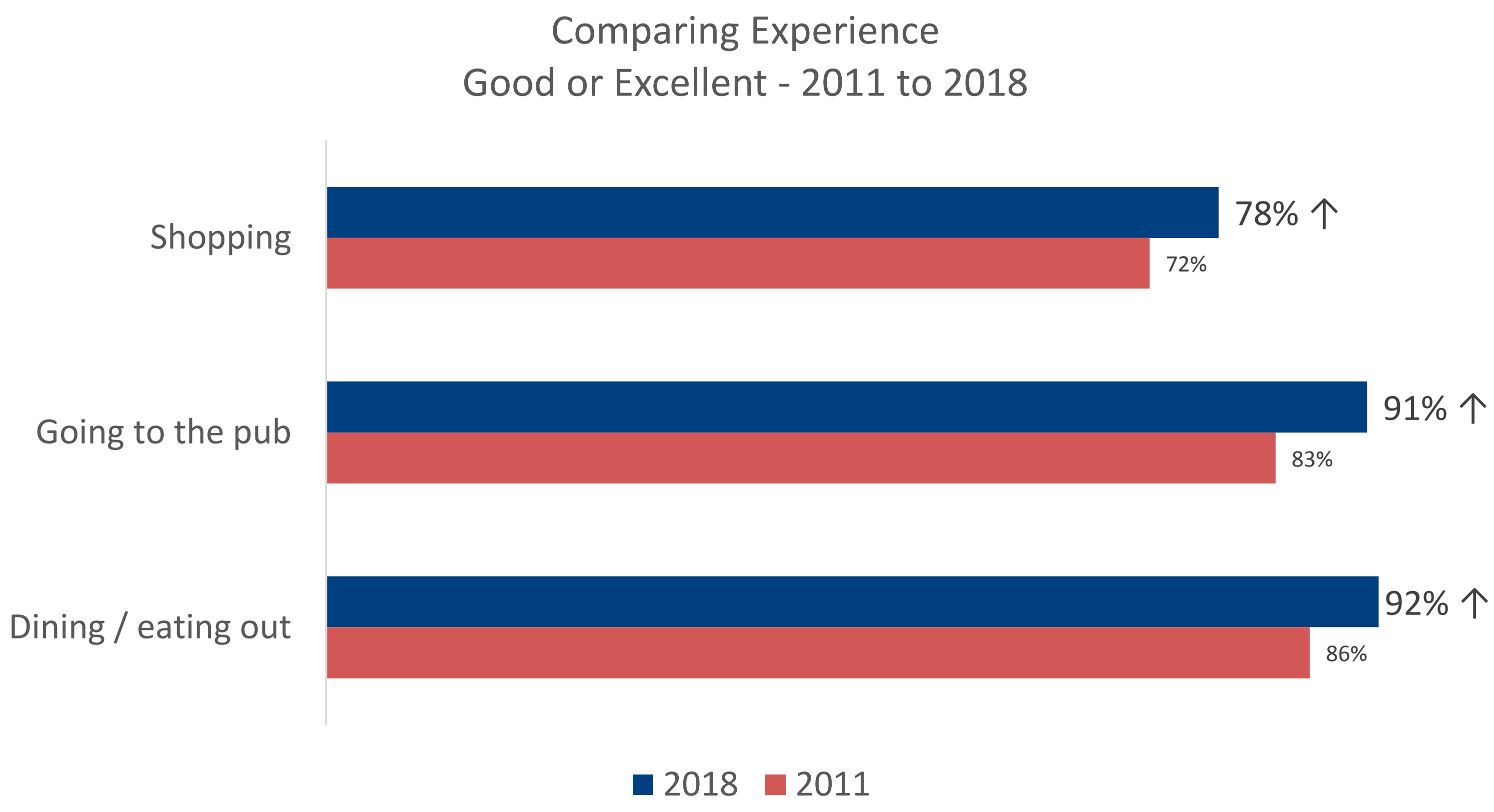

Experience improved in all 3 areas

2018 N=623+
2011 N=1752+

*2011 figure relates to "clothes / fashion" shopping only

What Makes a Good Day Out Shopping

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Dublin City Council

Q. When shopping in Dublin City Centre (other than for groceries), what makes for a good day out shopping for you?

What makes for a good day out shopping?	% first mentions
Finding what I want / Finding what I want quickly	11%
Not too busy / easy to get around	10%
Good selection of shops / independent shops	9%
Good value / good prices	9%
Good weather	9%
Relaxed / calm / good atmosphere / no nuisances / safe	8%
Easy to find parking / free or low cost parking	5%
When combined with meeting friends / socialising	4%
Coffee, tea / good coffee shops	4%
When traffic is light / easy to get in to / out of town	4%
Easy walking distances / easily move between shops	4%
Combined with lunch / eating out	4%
When public transport works well	4%
Good customer service	3%
Attractive / clean streets	2%
Pleasant / appealing stores and displays	2%
Easy bicycle parking / ease of cycling	1%
Buskers	1%
Pedestrianised areas	1%
Somewhere to sit down	0.4%
When other events / activties are happening	0.4%
Other	3%
Never enjoyable	1%

The complete set of verbatim comments is contained in the full report

Shopping & Socialising Activity

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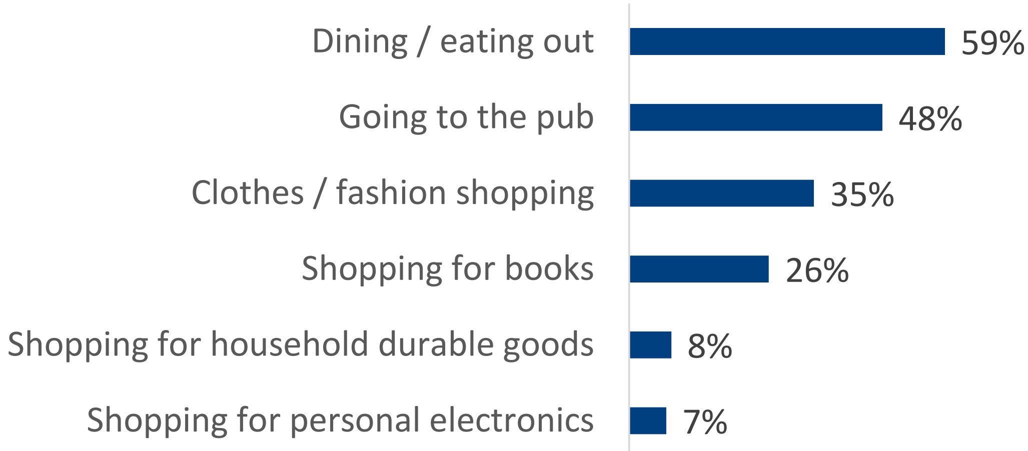
Q. In the past year how often have you engaged in each of the following activities?
% at least once a month



Shopping spend skews towards city centre for books and clothes, suburbs for household durables. Personal electronics spend skews towards suburbs and online

Pub spend skews towards the city centre for younger, suburbs for older

Eating Out spend skews towards the city centre for younger, suburbs for older

N=858

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Dublin City Council

Q. What are your suggestions for improving the overall shopping experience in Dublin?

N=612

Suggestions for Improving Shopping Experience

Comhairle Cathrach Bhaile Átha Cliath
Dublin City Council

Q. What are your suggestions for improving the overall shopping experience in Dublin?

Suggestion	% first mentions	% first mentions
More pedestrian friendly / Less traffic	14%	7%
Improve safety (begging / drinking / drugs)	13%	13%
Better / cheaper public transport	11%	11%
Cheaper / free parking	11%	18%
Cheaper prices / better value / offers	8%	6%
More support for smaller / local / Irish stores	7%	9%
Cleaner city centre / revamp areas (esp O'Connell St)	5%	5%
Better customer service / more personal	5%	4%
Improve footpaths / roads / public realm / less clutter	4%	-
Improve amenities (seating / parks / toilets)	3%	4%
Accessibility / ease of getting in and out	3%	0.5%
More cycle friendly	2%	3%
Secure storage for shopping / delivery service for shopping	1%	-
Make more family / child / restricted mobility friendly	1%	2%
Happy as it is	1%	-
More markets, outdoor and / or indoor	1%	1%
Environmental consdierations e.g. less plastic	1%	-
Better non-pub opening hours	1%	2%
Lower rates / rents	1%	1%
Improve ease of getting around city centre	1%	-
More events / festivals / public entertainment	1%	1%
Create shopping quarters	1%	-
Reduce nuisance of e.g. preachers buskers chuggers	1%	-
Better / more cafes and food outlets	0.5%	2%
Website / guide / directory	0.5%	1%
Improved signage	0.5%	0.5%
Free wifi / other technology	0.5%	-
City loyalty card / coupons	0.3%	1%
Larger shops (e.g. Woodies)	0.3%	1%
Other	2.8%	7%

"Better customer service / more personal" was highest among those aged over 65 – 19% of their comments

The complete set of verbatim comments is contained in the full report

N=612

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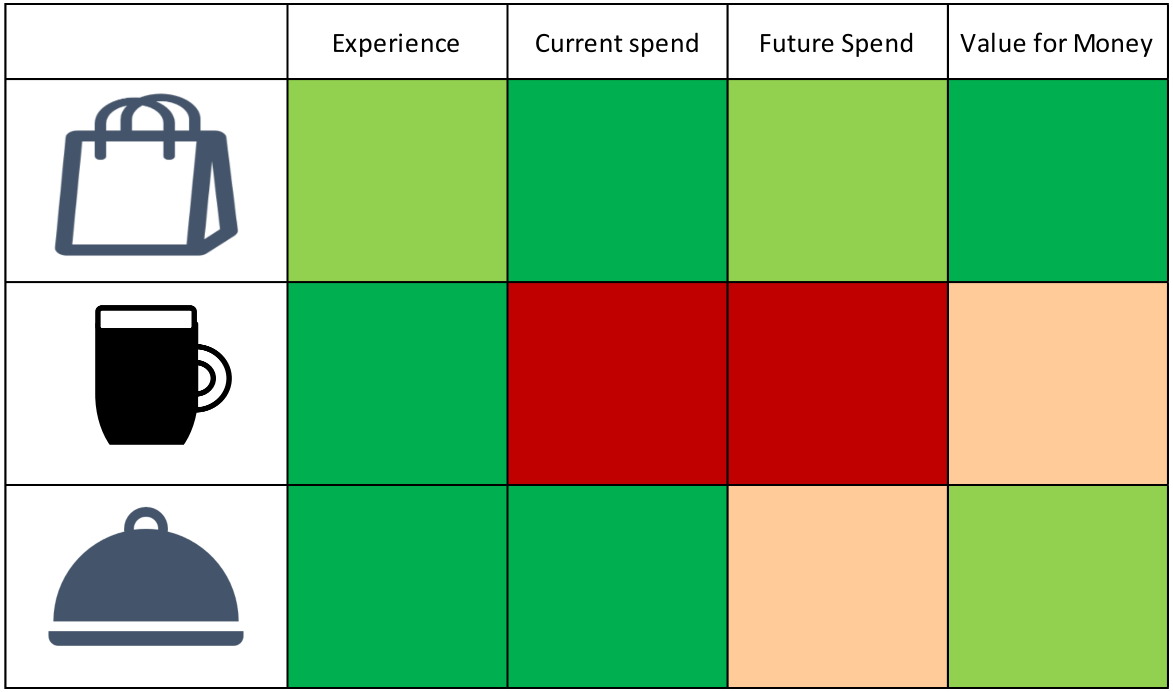
Visual Overview – Sentiment Around Shopping & Socialising



Positive
Positive with caution
Neutral or unchanged *
Negative

*Comparison against 2011 where available

Agenda

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Appeal of Areas in Dublin

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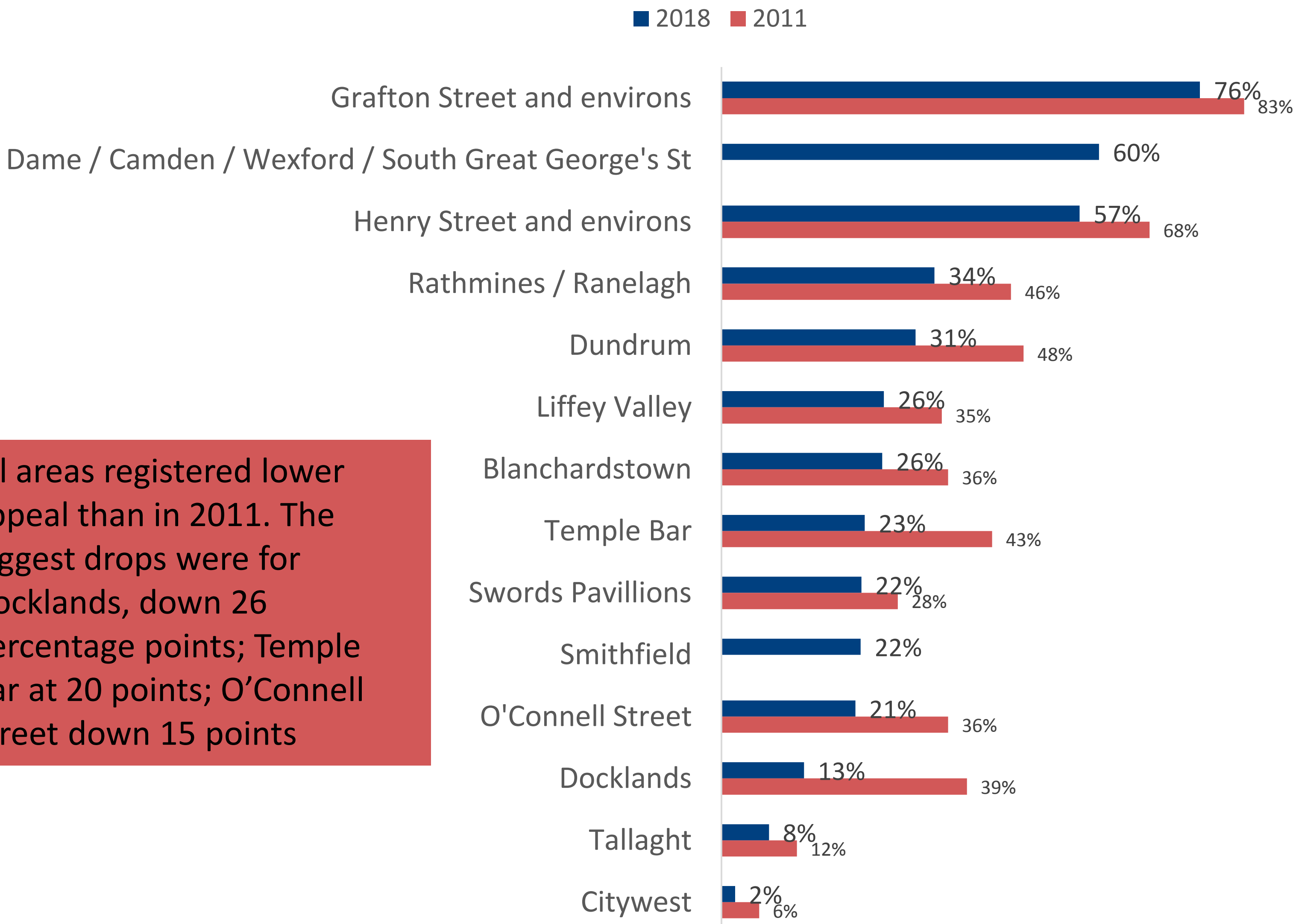
Dublin City Council

Q. From the following areas in Dublin, please select the areas that you find appealing, specifically in relation to shopping and socialising
% selecting



All areas registered lower appeal than in 2011. The biggest drops were for Docklands, down 26 percentage points; Temple Bar at 20 points; O'Connell Street down 15 points

2018 N=858
2011 N=1456

Appeal of Areas – Visual Overview

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	Age Group				Employment		Local Authority				Monthly Income				
Area / Demographic	18 to 34	35 to 49	50 to 65	Over 65	In employment	Not in employment	Dublin City Council	South Dublin CC	Fingal CC	DLR CC	<€1,000	€1k-2k	€2k-3k	€3k-4k	€4k+
Grafton Street and environs	74%	82%	73%	74%	78%	70%	79%	77%	64%	77%	58%	71%	81%	78%	91%
Dame St / Camden St etc.	68%	70%	52%	34%	67%	42%	65%	59%	45%	64%	41%	54%	65%	67%	67%
Henry Street and environs	54%	52%	59%	70%	54%	66%	62%	55%	61%	34%	60%	65%	56%	52%	46%
Rathmines / Ranelagh	42%	40%	21%	23%	37%	24%	38%	39%	15%	43%	21%	25%	42%	38%	39%
Dundrum	36%	30%	32%	19%	33%	25%	23%	37%	26%	71%	25%	29%	34%	28%	34%
Liffey Valley	27%	23%	30%	21%	26%	26%	18%	58%	21%	11%	32%	29%	22%	27%	21%
Blanchardstown	27%	26%	28%	19%	26%	26%	23%	19%	47%	10%	29%	26%	27%	27%	15%
Temple Bar	33%	20%	19%	11%	24%	19%	24%	17%	18%	12%	25%	27%	22%	18%	24%
Swords Pavillions	25%	17%	20%	29%	19%	30%	24%	1%	54%	4%	29%	29%	20%	17%	12%
Smithfield	29%	25%	17%	6%	27%	10%	29%	17%	20%	10%	17%	20%	28%	20%	20%
O'Connell Street	27%	12%	18%	30%	19%	27%	21%	22%	18%	15%	29%	31%	15%	22%	12%
Docklands	14%	14%	14%	8%	15%	9%	16%	14%	5%	10%	6%	14%	14%	12%	22%
Tallaght	7%	8%	9%	7%	8%	7%	5%	23%	3%	3%	14%	7%	6%	7%	7%
Citywest	3%	2%	1%	2%	2%	4%	1%	5%	2%	0%	5%	2%	1%	3%	1%

Less appealing <-> More appealing

Midpoint is the average across the entire table

Dame / Camden / Wexford / Sth Gt George's St is more appealing to younger respondents

Henry Street is more appealing among those aged over 65

Blanchardstown was the only area with significantly greater appeal among female respondents (31%) than among male respondents (20%)

Dundrum was the only area with significantly greater appeal among high tech savvy respondents (44% vs 31% overall)

N=753

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Bhaile Átha Cliath
Dublin City Council

Factors Influencing Where You Shop

Comhairle Cathrach Bhaile Átha Cliath
Dublin City Council

	Rank in 2018		Rank in 2011
Good choice of shops / range of good stores	1	→	1
Good prices / Good value for money	2	→	2
Pedestrianised streets / attractive environment	3	↑	5
Close to home / convenient	4	↓	3
Good / Cheap Public Transport	5	↑	7
Free / cheap parking	6	↓	4
Ease of parking	7	↓	6
Close to work	8	↑	9
Family friendly	9	↓	8
How well technology is used to make a better shopping experience	10		not asked

The top 2 influencing factors remain "Good choice of shops / range of good stores" and "Good prices / Good value for money"

The relative importance of "Pedestrianised streets / attractive environment", "Good / cheap public transport" and "Close to work" have increased since 2011

N=858

Agenda

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Q. Do you ever do any of the following in Dublin City or in the greater Dublin area?

N=844

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Getting in to the City Centre

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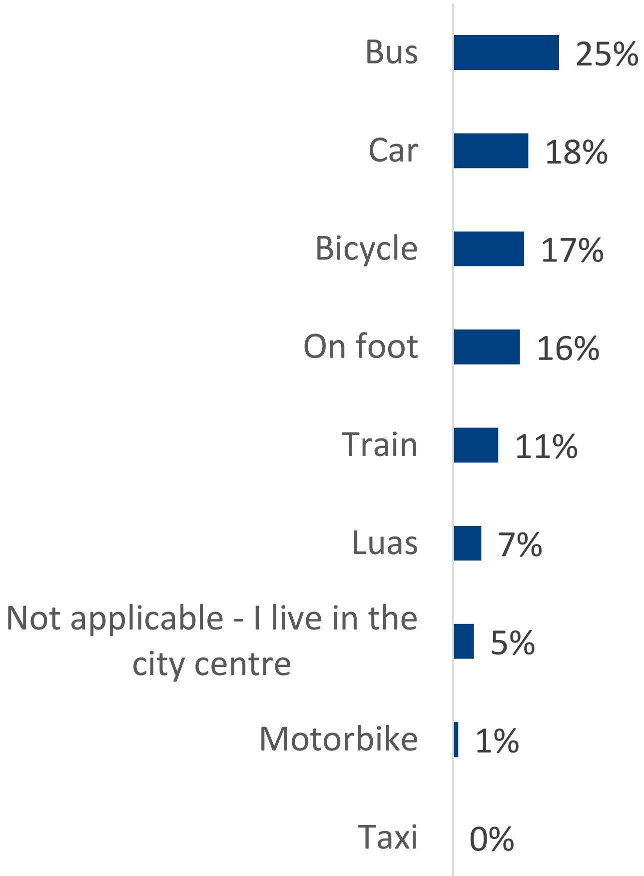
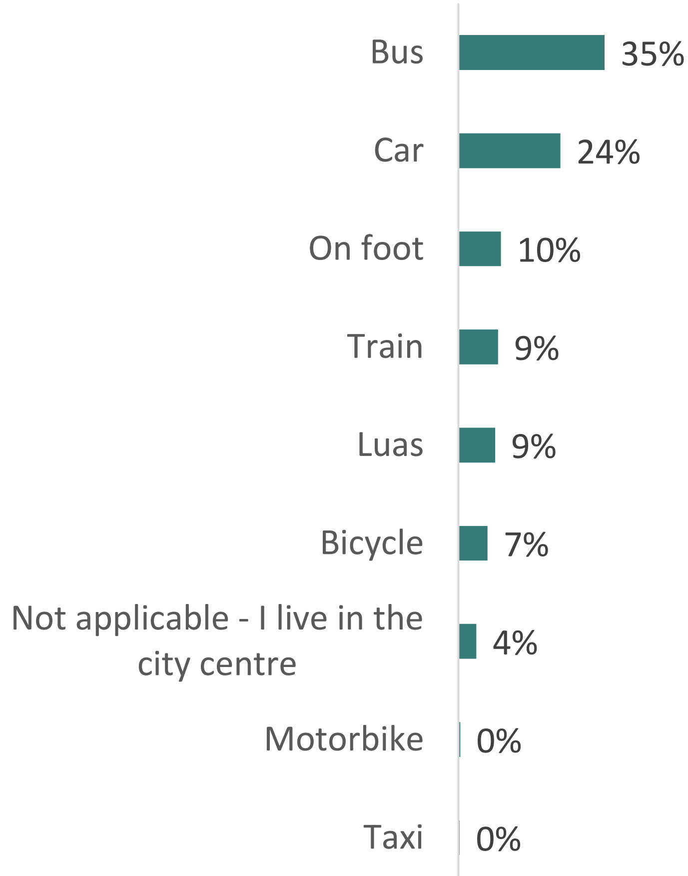
Dublin City Council

Q. In general, how do you usually get in to Dublin city centre for work or study?



N=347

Q. In general, how do you usually get in to Dublin city centre for shopping?



N=828

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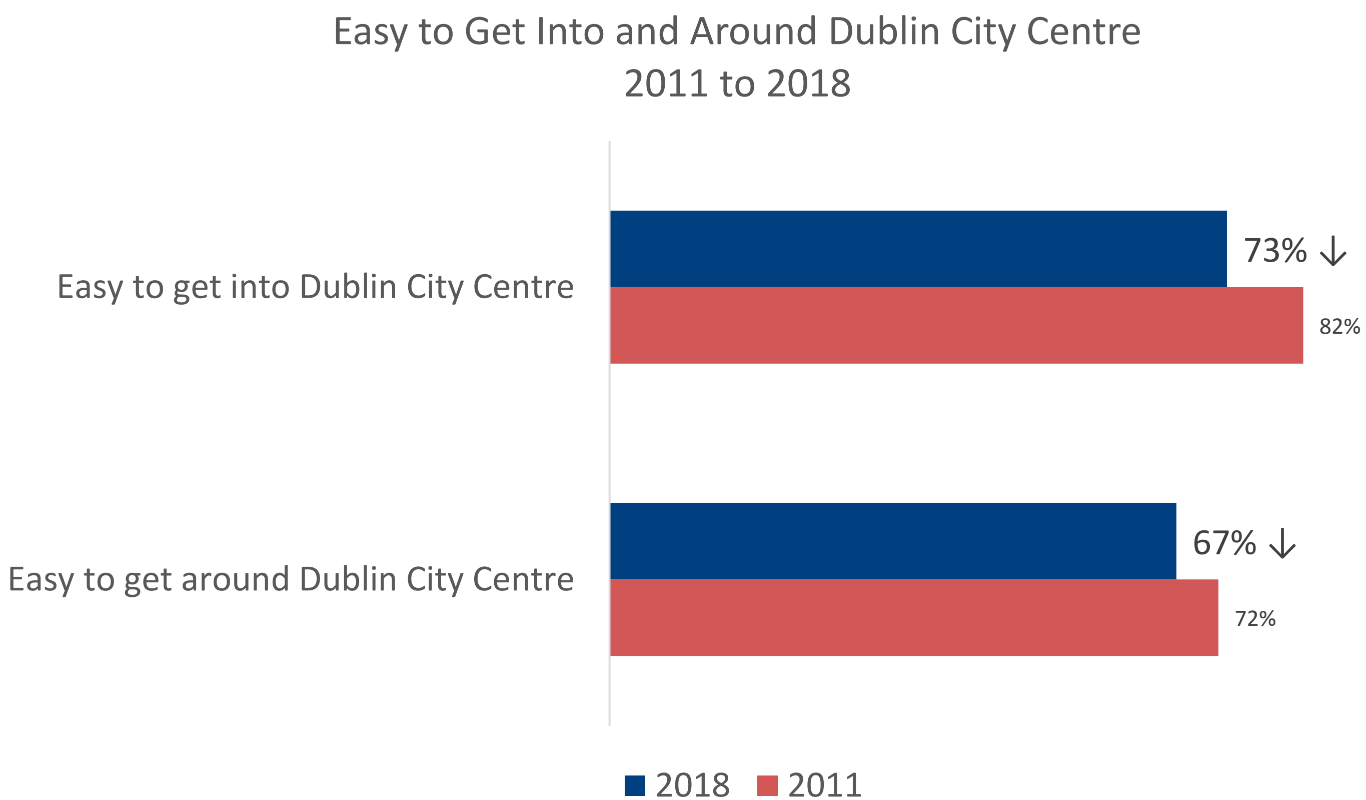
Public Transport vs Car – Getting in to the City Centre for Shopping

		Bus / Luas / Train	Car
Gender	Female	59% ↑	22%
	Male	47% ↓	27%
Age group	18 to 34	49%	23%
	35 to 49	45% ↓	27%
	50 to 65	53%	34% ↑
	Over 65	79% ↑	10% ↓
Employment	In employment	48% ↓	27% ↑
	Not in employment	69% ↑	16% ↓
Dependent children	Yes	43% ↓	39% ↑
	No	57% ↑	19% ↓
Tech savvy	Low Tech Savvy	60%	17% ↓
	Mid Tech Savvy	52%	25%
	High Tech Savvy	43%	38% ↑
Monthly disposable income	Less than €100	68% ↑	19%
	€100-€300	58%	25%
	€301-€500	52%	31%
	€501-€700	58%	16%
	€701-€1000	38% ↓	25%
	More than €1,000	39% ↓	29%
Local authority	Dublin City Council	45% ↓	21%
	South Dublin CC	66% ↑	30%
	Fingal County Council	59%	30%
	DLR CC	66%	25%
	Average	53%	24%

Arrows indicate significantly higher or lower than average

N=828

Getting Into & Around the City Centre vs 2011



85% of over 65s find it easy to get into the city centre

73% of females find it easy to get around the city centre

N=823

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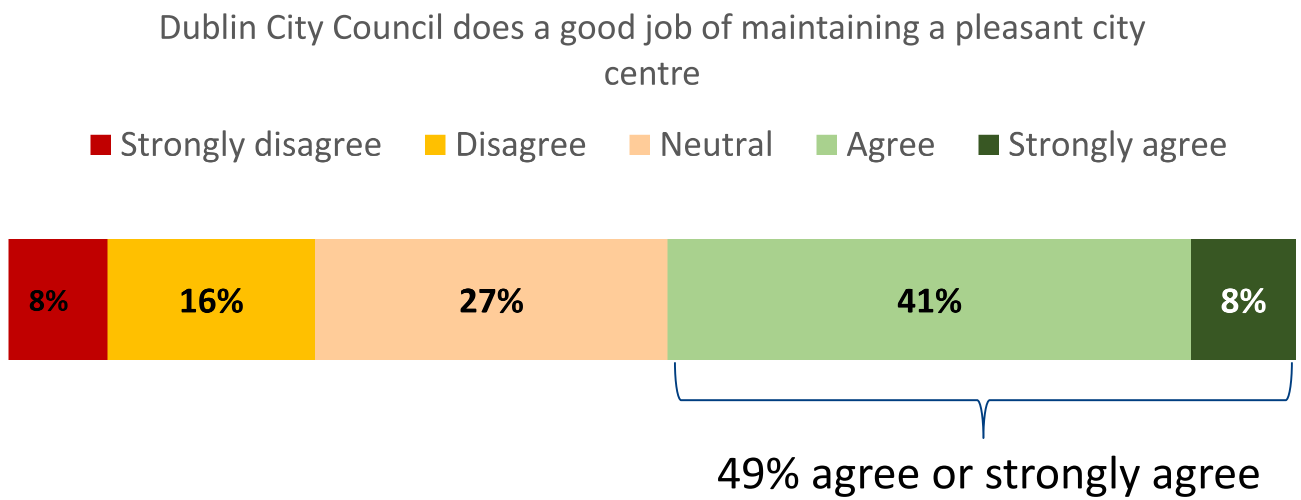
Dublin City Council



Higher among females (55%) than among males (42%)

N=824

Pleasant City Centre - Agreeing

Q. What are your reasons for agreeing with the statement "Dublin City Council does a good job of maintaining a pleasant city centre?"

Reason	% first mentions
Generally clean / positive	60%
Praise for work done by staff / DCC	11%
Public realm well maintained	10%
Could be better	8%
Flowers / planters / greenery / landscaping	5%
Good lighting	2%
Nice pedestrianised areas	1%
Other	2%

The dominant driver of agreement with this statement is the perception of a clean city centre

The complete set of verbatim comments is contained in the full report

Pleasant City Centre - Disagreeing

Comhairle Cathrach
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Q. What are your reasons for disagreeing with the statement “Dublin City Council does a good job of maintaining a pleasant city centre?”

Reason	% first mentions
Litter / dirty	36%
Too much traffic / traffic focused / anti pedestrian	15%
Safety / anti social behaviour	18%
Poor maintenance of public realm esp. footpaths	10%
Poor planning / design	6%
Street clutter / poor signage	4%
Anti car	3%
Homelessness	2%
Poor cycling infrastructure	2%
Roadworks	1%
Other	3%

“Litter / dirty” was mentioned by 53% of female respondents who did not feel that Dublin City Council does a good job of maintaining a pleasant city centre

The complete set of verbatim comments is contained in the full report

Agenda

Comhairle Cathrach Bhaile Átha Cliath
Dublin City Council

Online Shopping

Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

Q. How often do you do any of the following?

Online shopping behaviour tends to be higher among younger age groups, among the more educated, among those with children, and among the tech savvy

Engaging in the various online shopping behaviours does not vary by income level

N=844+

END

For further information please contact:

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

Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council