

Your Dublin, Your Voice Night-time Economy February 2020

Executive Report



Survey reference period: February 2020

Report by  **Delve Research**
Survey Research & Analysis

www.delve-research.com

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Engaging in Activities 6pm-6am

- Carrying out everyday tasks such as shopping or personal errands, and eating out were the two most common activities that respondents engaged in – 72% in both cases
- These were followed by “socialising at home / in a private residence” (71%), “socialise somewhere other than a pub or bar (such as a café or public space)” (67%) and “socialise in a pub or bar” (65%)

Barriers to Going out More at Night

- 41% of respondents selected “It’s too expensive to go out in Dublin at night” as one of the top 3 barriers to them going out more in Dublin at night
- This was followed by “It is difficult for me to get home at night” (26%), “It costs too much for me to travel around Dublin at night” (21%) and “I do not feel safe in Dublin at night” (21%)
- “Venues close too early” was the most commonly mentioned unprompted barrier

Priorities for Night-time Experience

- 66% of respondents selected “Improved night-time transport” as one of their top 3 priorities for improvement in the night-time experience in Dublin
- This was followed by “Better safety at night” (44%) and “More free / low-cost activities” (36%)
- Better safety was the highest priority among those aged over 50. Improved transport was a higher priority for those aged under 50

Availability and Demand – 12am – 3am

- 73% of respondents felt that there are adequate (or less needed) bars available at these hours, 64% felt that there are adequate shops, 63% felt that there are adequate restaurants available, and 51% felt that there are adequate dance venues
- If service were available between 12am and 3am, 60% of respondents indicated that they would be likely to use music venues, 58% bars, 49% cultural venues and 49% performance spaces
- Males, those aged 18-34, and those living in Dublin 1 to 5 years more likely to use all services if available during these hours

Availability and Demand – 3am – 6am

- 72% of respondents felt that there are adequate restaurants available at these hours, 68% felt that there are adequate games venues available, 67% felt that there are adequate shops available, and 62% felt that there are adequate cafés
- There are no types of venue for which the majority of respondents felt more were needed
- If service were available between 3am and 6am, 44% of respondents indicated that they would be likely to use music venues, 42% bars, and 40% dance venues
- Males, those aged 18-34, and those living in Dublin 1 to 5 years more likely to use all services if available during these hours

Travel and International Comparisons

- 49% of respondents indicated that they travel abroad for leisure at least once every few months. This was higher among 18-34 year-olds (65%) and among those with more than €1,000 disposable monthly income (70%)
- Among those with a basis for comparison, 73% rate Dublin's nightlife poorer, 10% rate Dublin's nightlife better than the nightlife in the cities they have visited abroad
- Berlin, London and Amsterdam were the cities most commonly selected in the top 3 European cities for nightlife
- 13% of respondents placed Dublin in their top 3 European cities for nightlife

Suggestions for Improving Night-time Activities

- “Longer or staggered opening hours for venues / licencing reform” was suggested by 30% of respondents as a way to improve or add to night-time activities in Dublin
- This was followed by “Improved safety / security” (14%) and “More options other than pubs / clubs (non-alcohol related) (11%)
- Males were more likely than females to suggest “Longer / staggered opening hours for venues / licencing reform”, females were more likely to suggest “More options other than pubs / clubs (non alcohol related)”
- Younger respondents were more likely to suggest “Longer / staggered opening hours for venues / licencing reform”
- Older respondents were more likely to suggest “Improved safety / security”

Perceptions of the Evening-time Economy – 6pm to 12 midnight

- 90% of respondents agreed that “The evening-time economy is important to the overall Dublin economy”
- 89% agreed that “The evening-time economy makes a positive contribution to Dublin's cultural life”
- Younger respondents were more likely to feel that more evening time options are needed
- 40% agreed that “There is good public transport in Dublin between 6pm and 12 midnight” – females were less likely to agree than males

Suggestions for Improving Public Transport – 6pm – 12 midnight

- “Increased frequency / availability / running later / running 24 hours” was suggested by 78% of respondents as the way to improve public transport in Dublin between 6pm and midnight
- Bus was the most commonly mentioned mode among these suggestions, followed by Luas, train and Dart

Perceptions of the Night-time Economy –12 midnight to 6am

- 74% of respondents agreed that “The night-time economy is important to the overall Dublin economy”
- 72% agreed that “The night-time economy makes a positive contribution to Dublin's cultural life”
- Younger respondents were more likely to have a positive perception of Dublin’s night-time economy
- 9% agreed that “There is good public transport in Dublin between 12 midnight and 6am” – females and those living in Dublin more than 5 years were less likely to agree

Suggestions for Improving Public Transport – 12 midnight to 6am

- “Increased frequency / availability / running later / running 24 hours” was suggested by 87% of respondents as the way to improve public transport in Dublin between 12 midnight and 6am
- Bus was the most commonly mentioned mode among these suggestions, followed by Luas, Dart and train

Night-time Manager

- 70% of respondents were somewhat or fully in favour of having a night-time manager, funded directly by specific taxes / rates
- Support for a night-time manager was highest among males, among 18-34 year –olds and among those living in Dublin 1 to 5 years

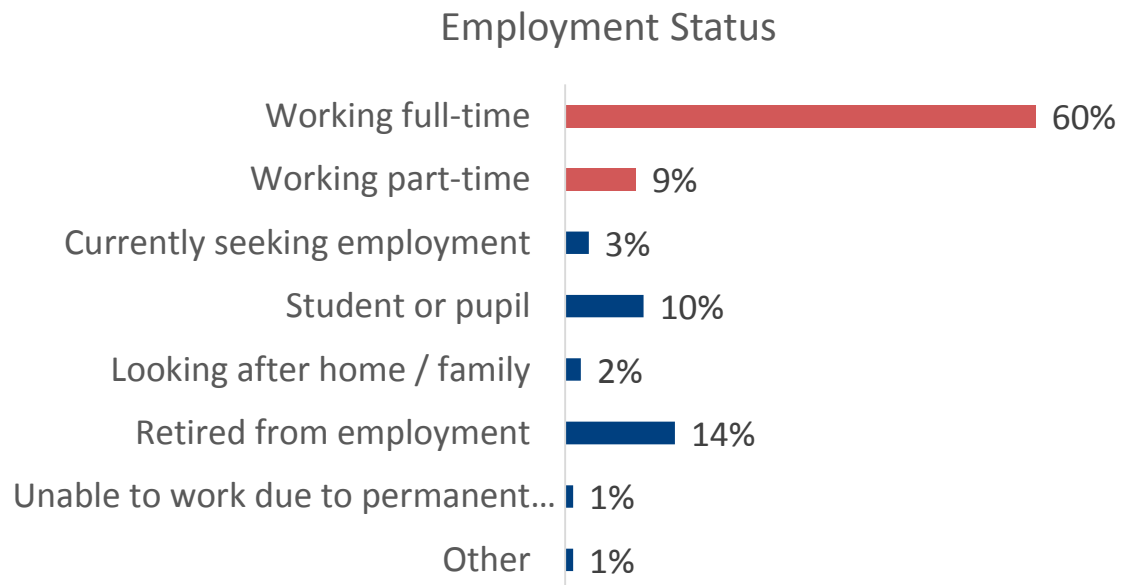
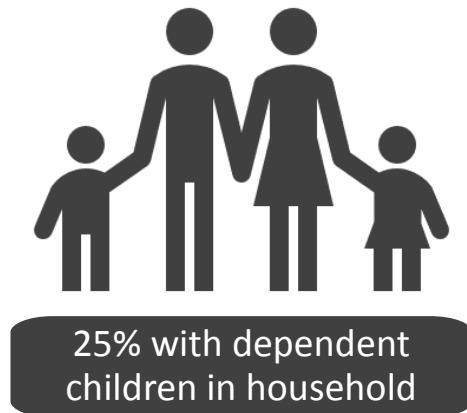
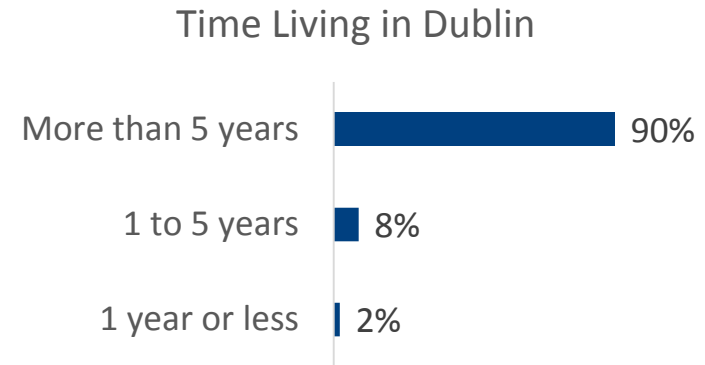
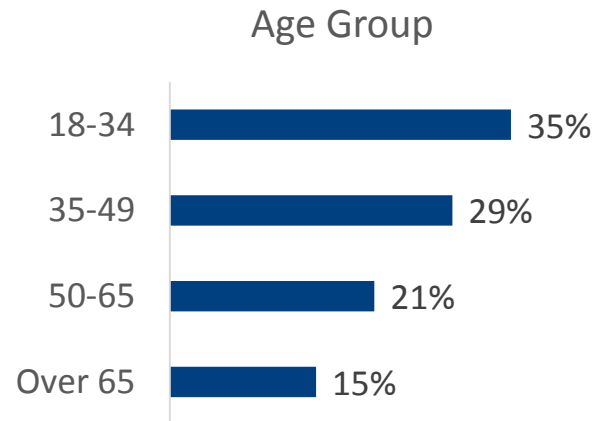
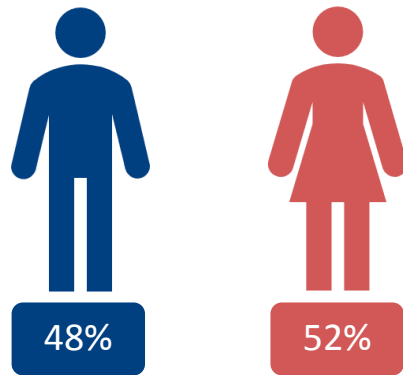
Night-time Work

- 8% of those at work indicated that they work predominantly in the evening or at night
- 34% of those in the C2DE social grade indicated that they work predominantly in the evening or at night
- 37% of workers with less than €1,000 monthly income indicated that they work predominantly in the evening or at night
- 26% of those working in the evening or at night work in the Hospitality sector, while a further 24% work in the Creative Industries

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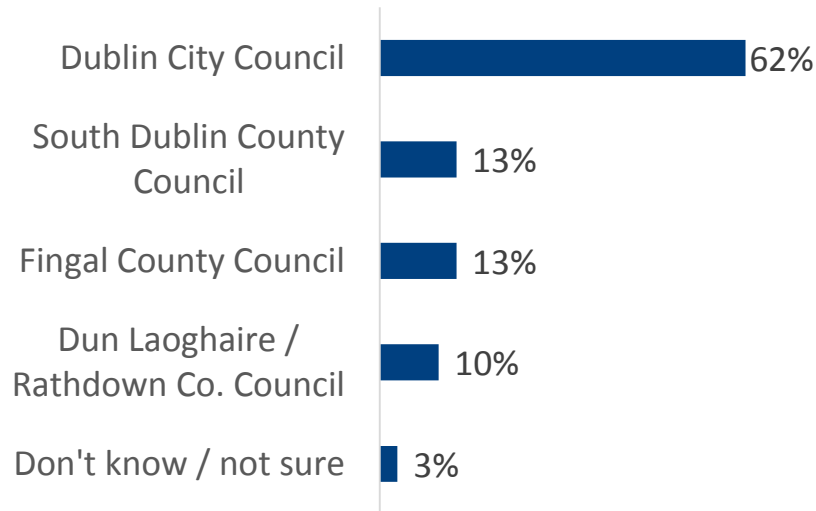
- Online survey, 13th February – 21st February 2020
- 1,184 respondents, from “Your Dublin, Your Voice” opinion panel
- 22% response rate
- Global margin of error = +/- 2.9%
- Robust panel in existence since 2010, recruitment through various channels



37 nationalities represented on this survey
92% Irish



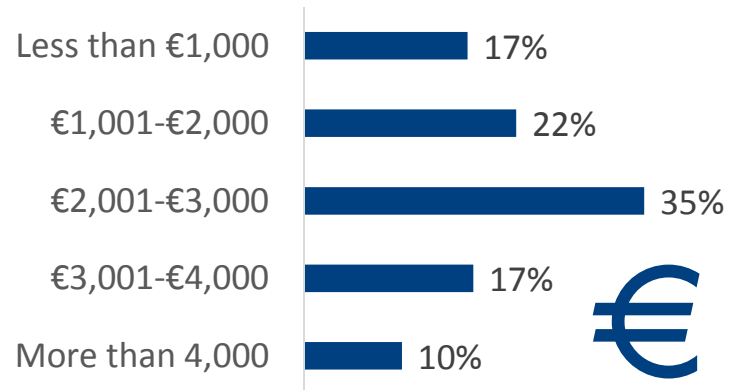
Local Authority



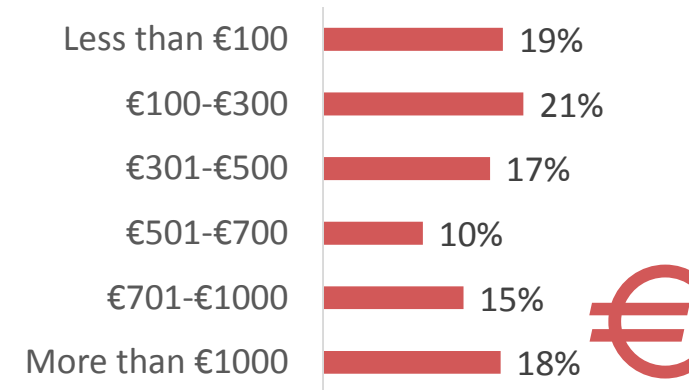
Current Area of Residence

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

Monthly Income After Taxes, Before Bills



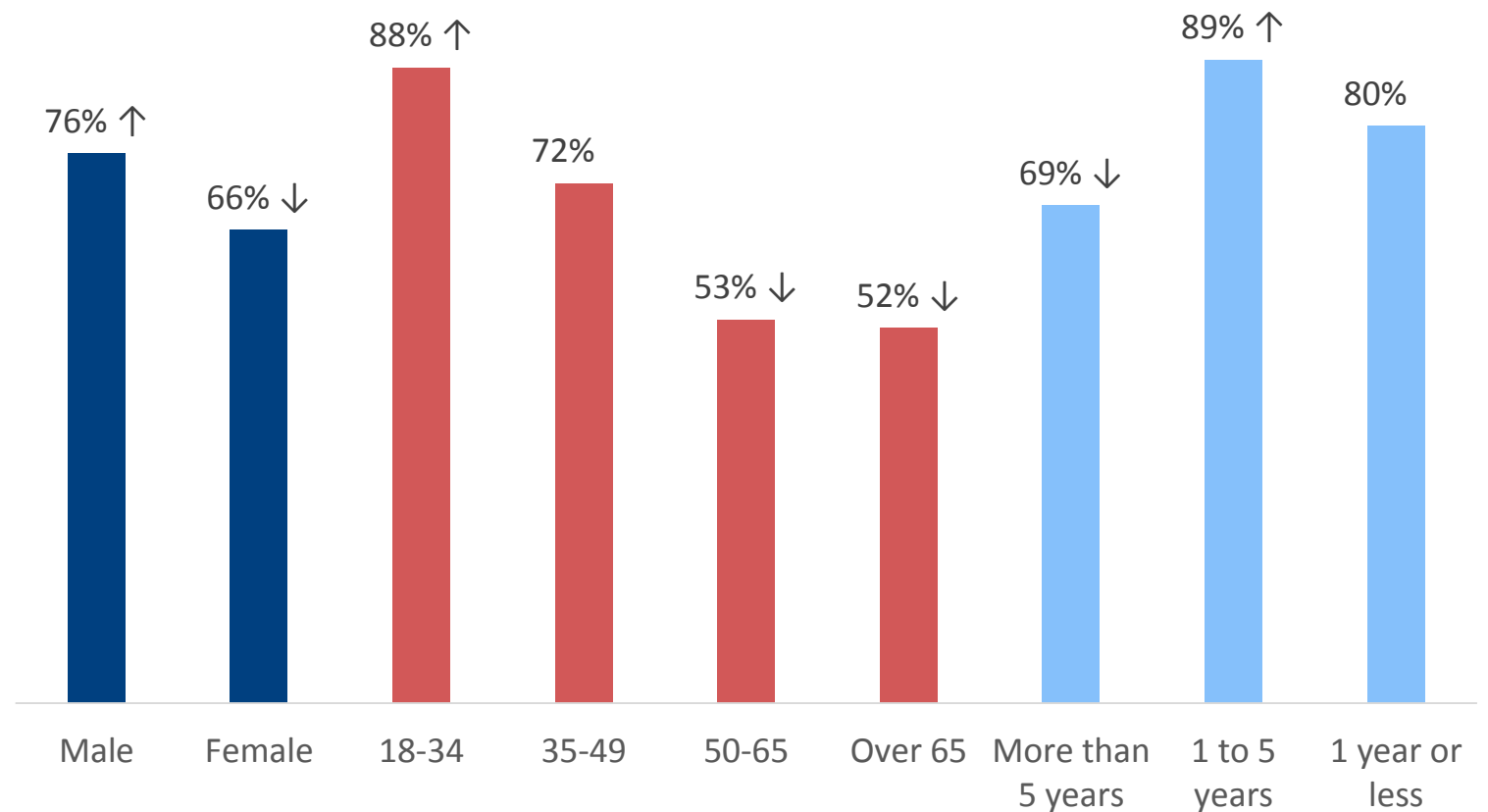
Monthly Disposable Income After Bills Are Paid



Conventions used throughout this report:

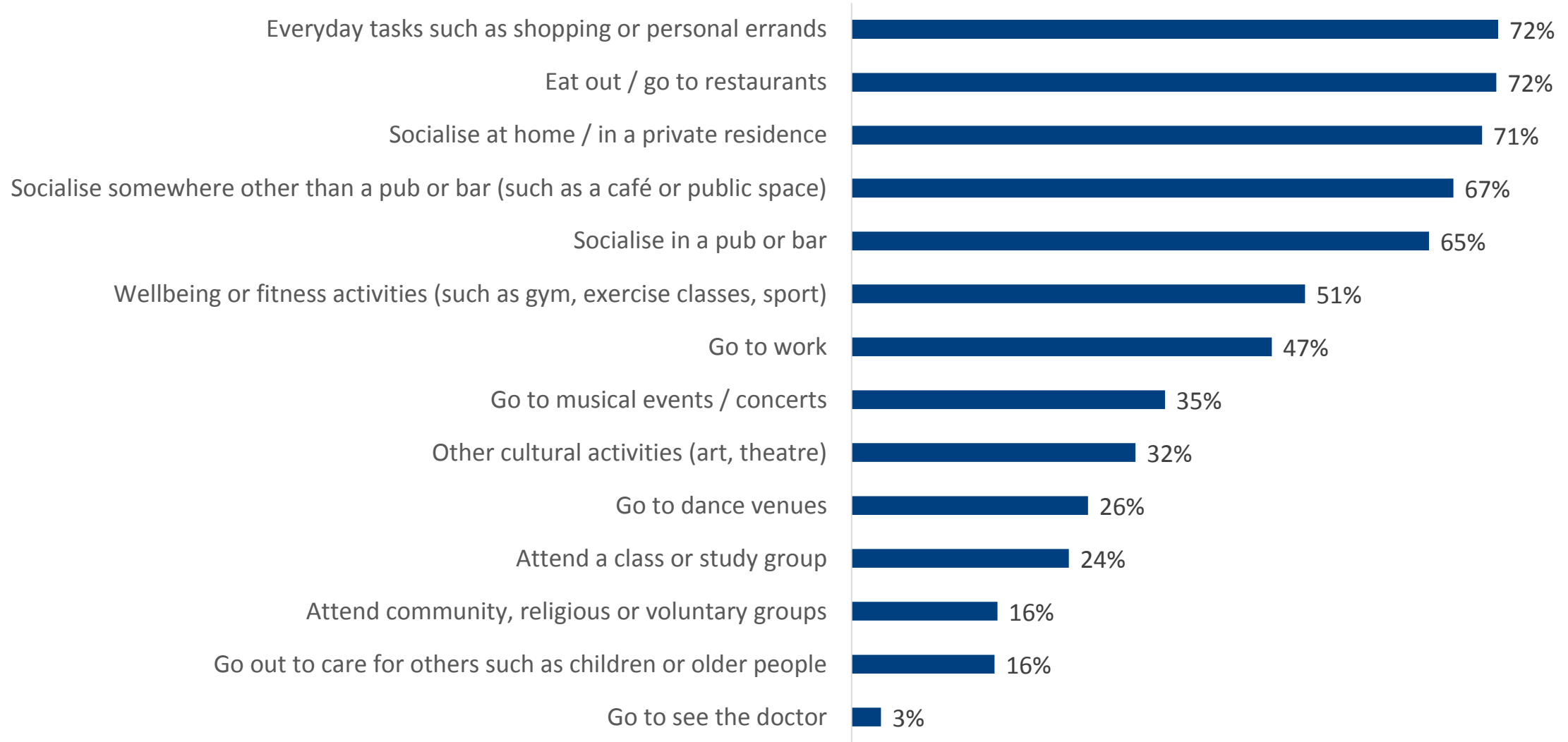
Where charts are used and there are statistically significant differences between categories, arrows up or down signify statistically significant differences above or below the average for a given measure

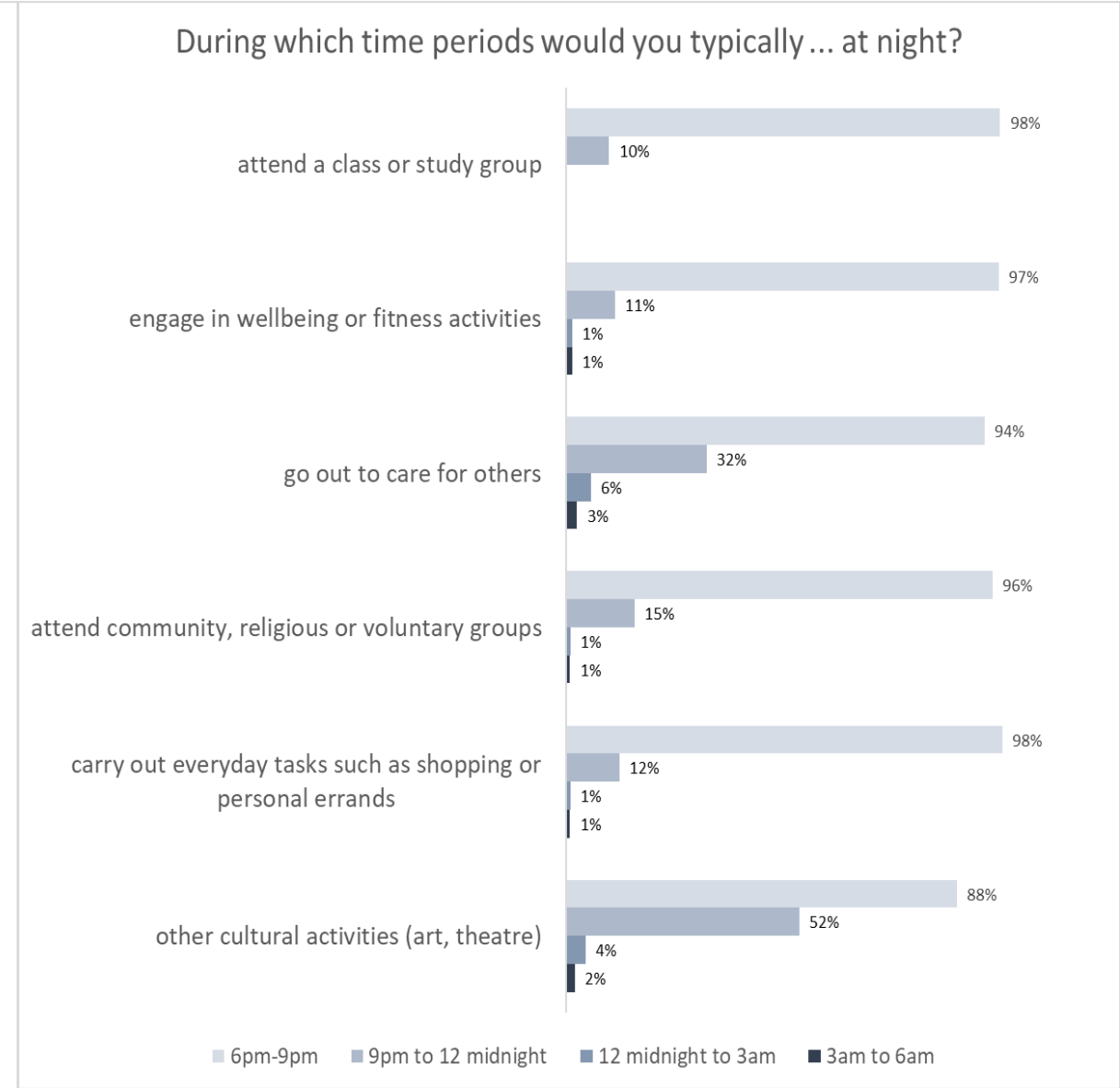
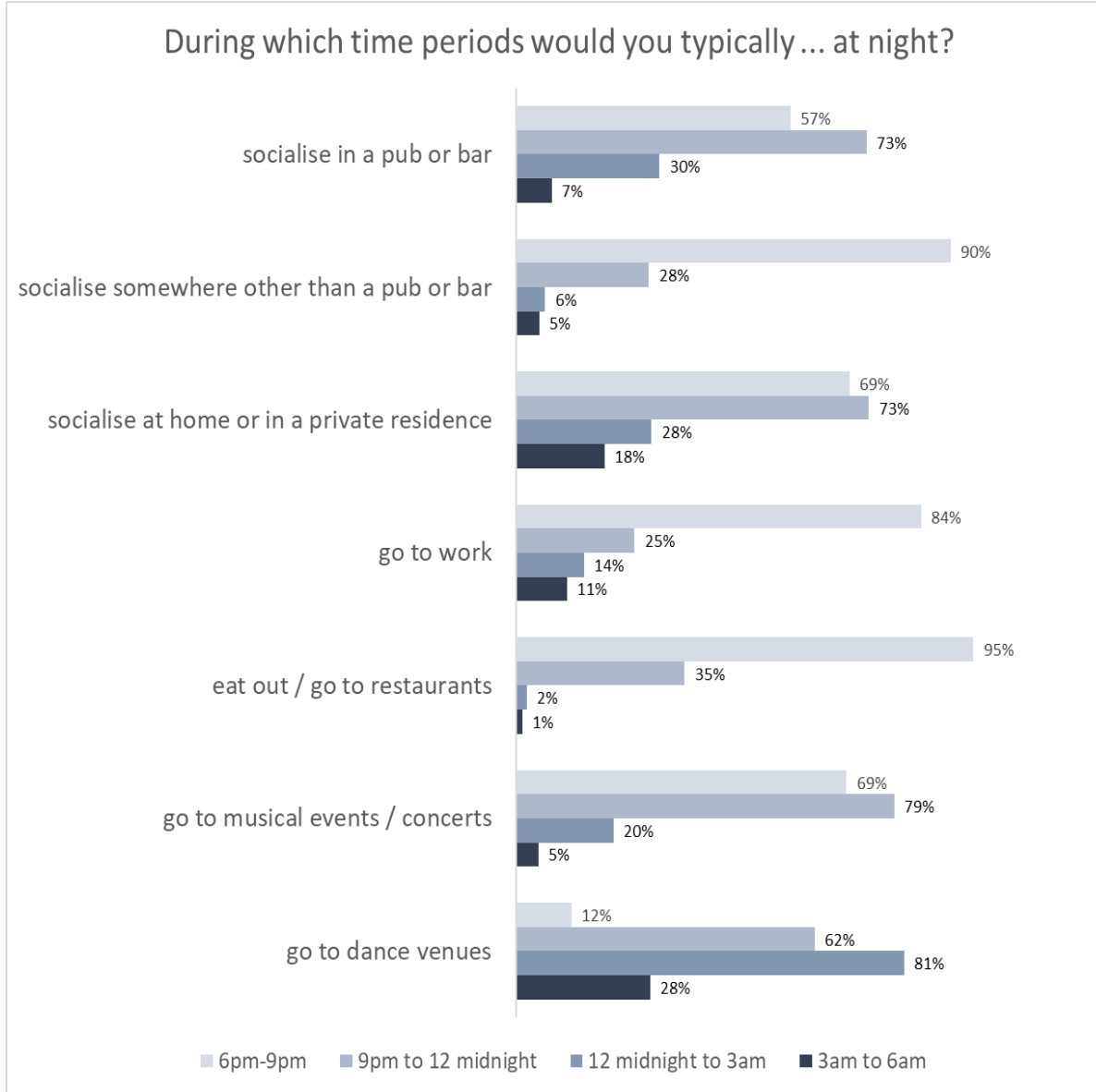
In favour of a night-time manager for Dublin



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Engaging in activities between 6pm and 6am at least once a month





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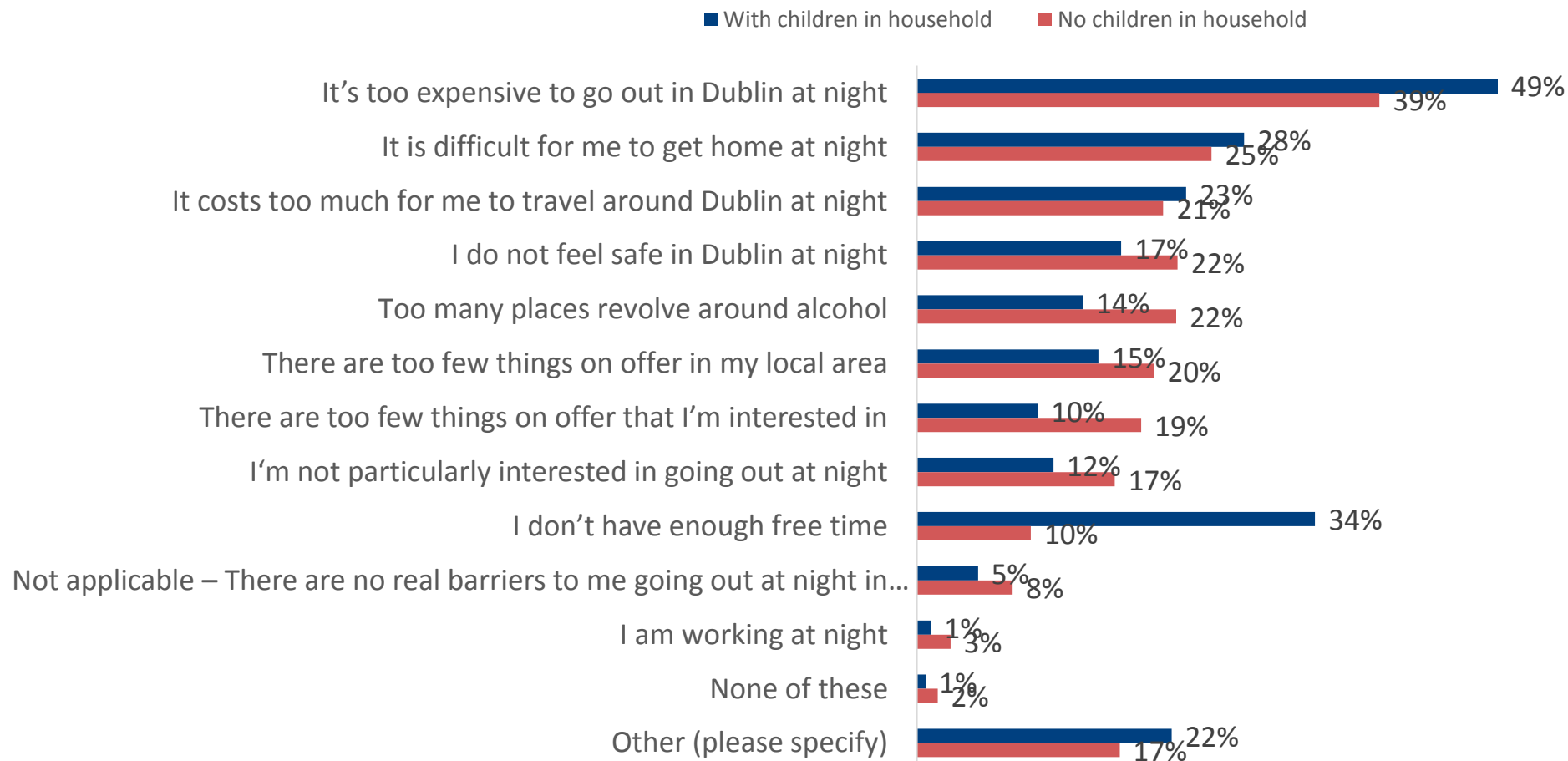
Which of the following, if any, are the main barriers to you going out at night in Dublin more?

% selecting in top 3



Which of the following, if any, are the main barriers to you going out at night in Dublin more?

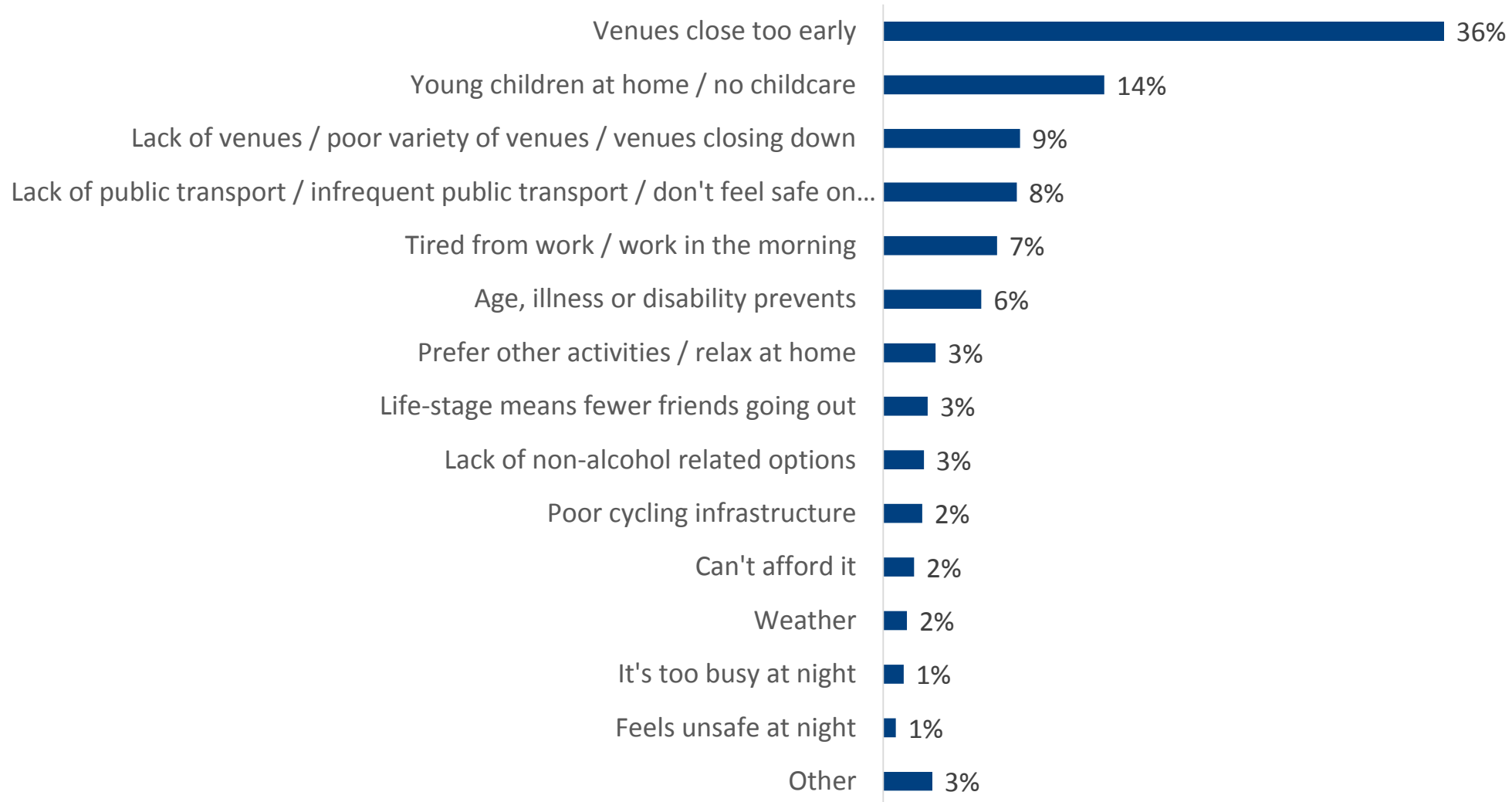
% selecting in top 3



“It’s too expensive to go out in Dublin at night” was a bigger issue among those with children in the household, as was “I don’t have enough free time”

“Too many places revolve around alcohol” was a bigger issue among those with no children in the household

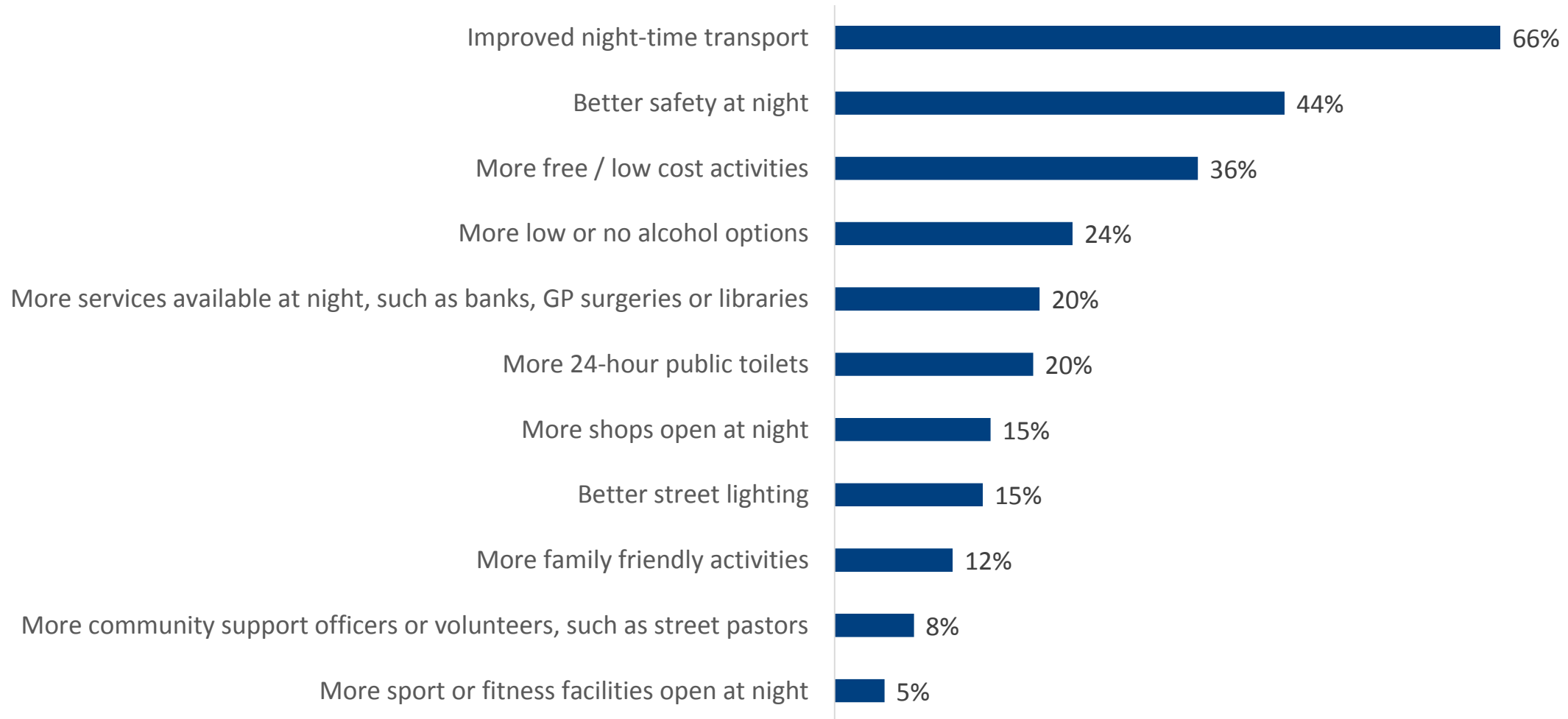
Other barriers specified



N=223

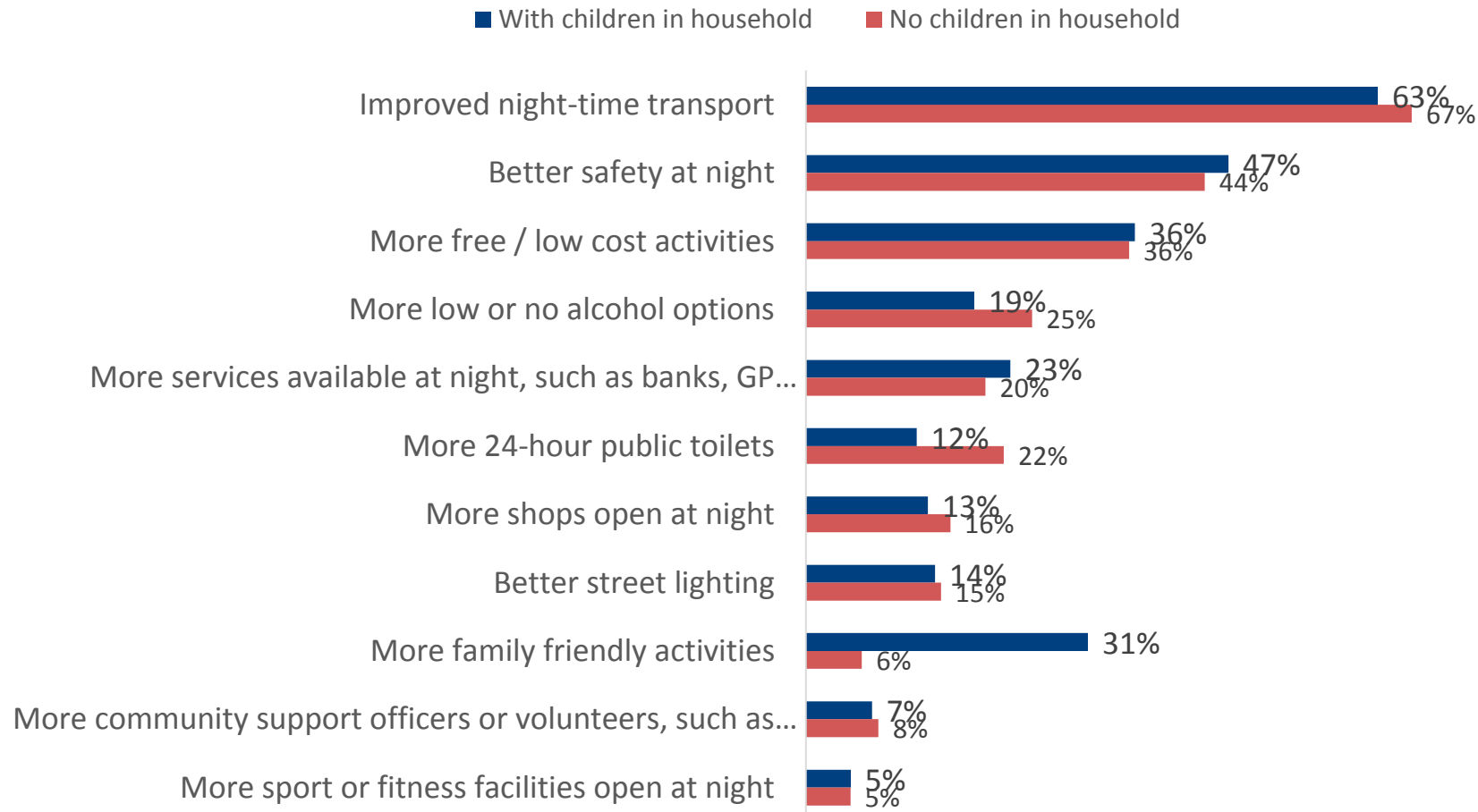
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Thinking about night-time activities, which of the following would you most like to see prioritised in Dublin? (Please select your top three)



N=1,160

Thinking about night-time activities, which of the following would you most like to see prioritised in Dublin? (Please select your top three)

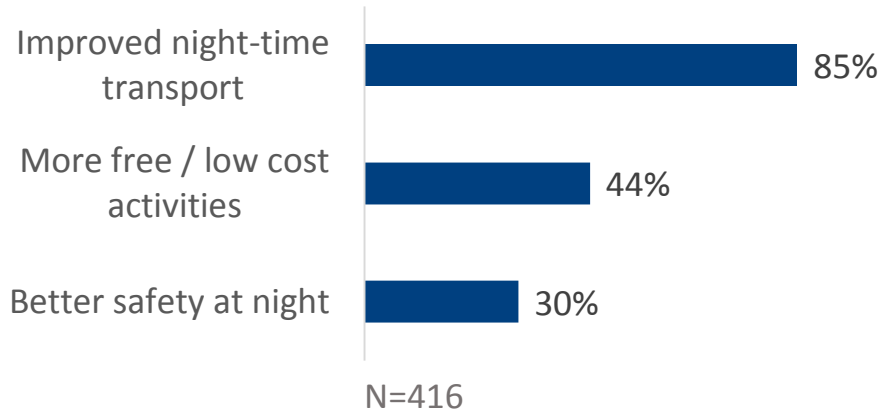


“More family friendly activities” was a bigger priority for those with children in the household than for others.

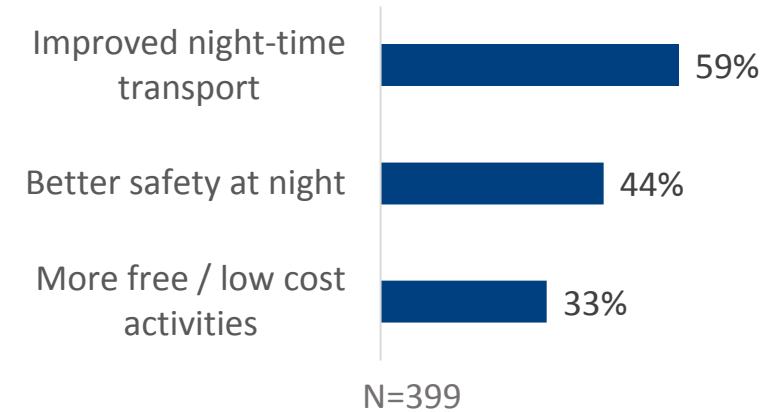
“More 24-hour public toilets was a bigger priority for those without dependent children in the household.

N=1,160

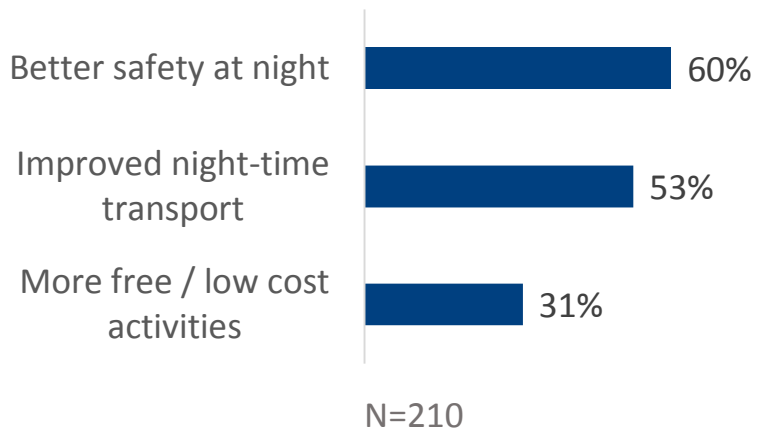
Top 3 Priorities 18 to 34 year olds % selecting in top 3



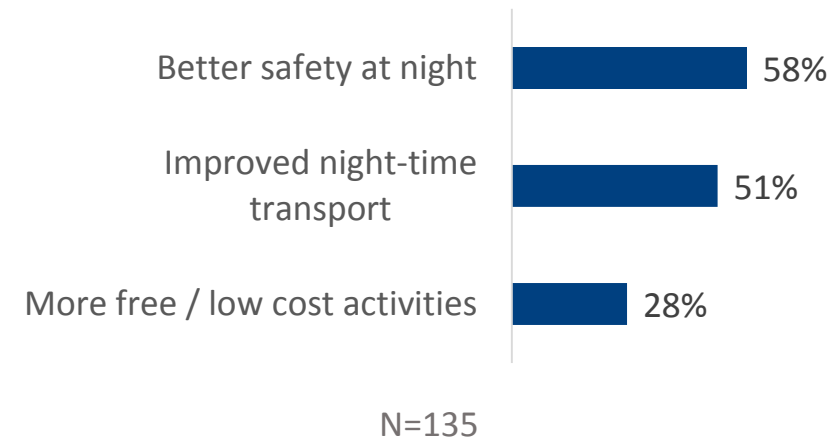
Top 3 Priorities 35 to 49 year olds % selecting in top 3



Top 3 Priorities 50 to 65 year olds % selecting in top 3

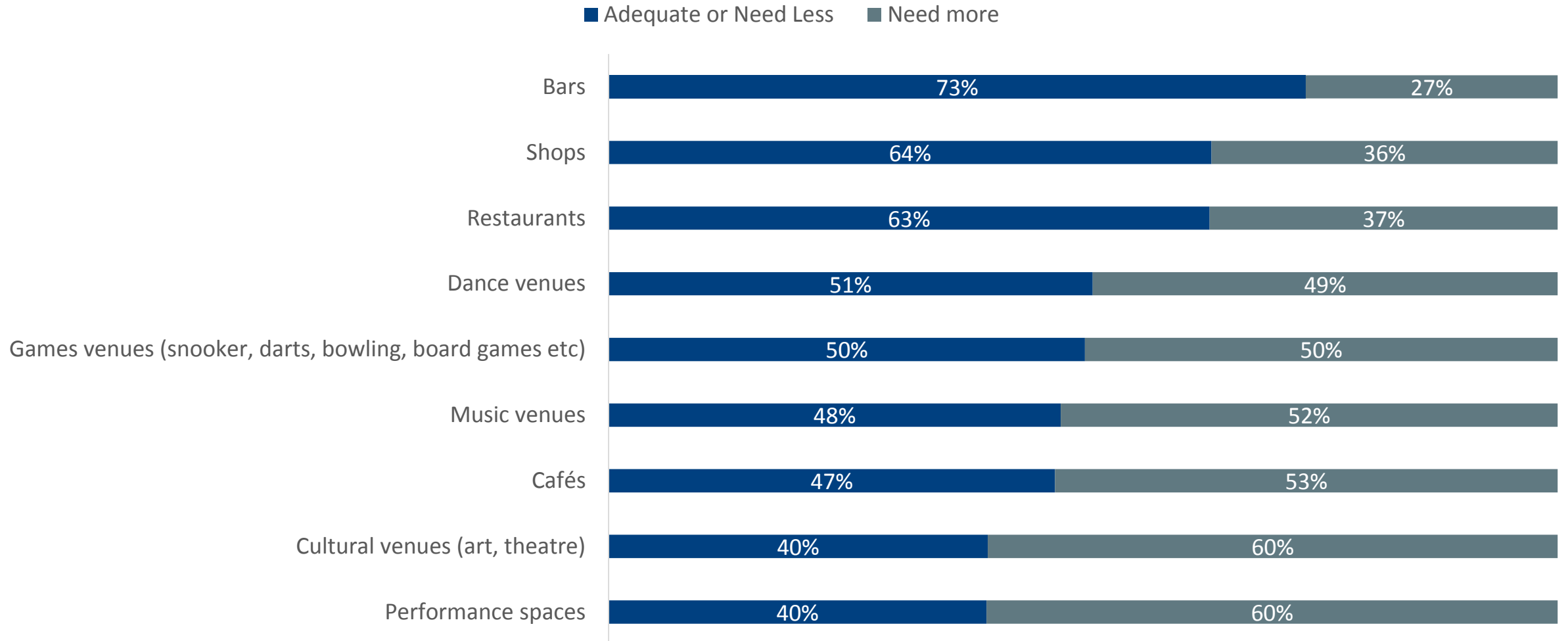


Top 3 Priorities, those aged over 65 % selecting in top 3



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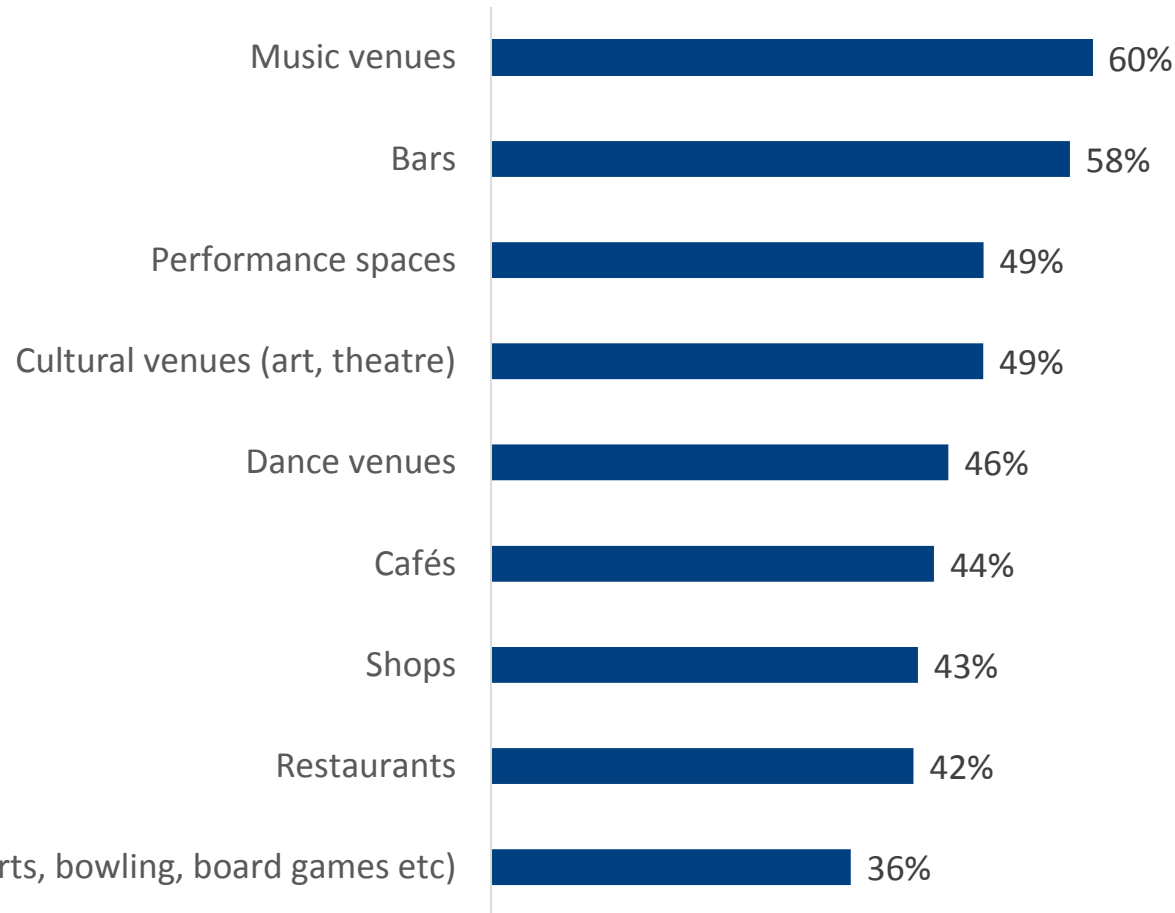
Thinking of the current range of night-time (12 midnight to 3am) facilities available in Dublin, how do you rate each one's availability?



N=1,142+

If service was available from 12 midnight to 3am, how likely would you personally be to use each of the following?

% somewhat or very likely to use



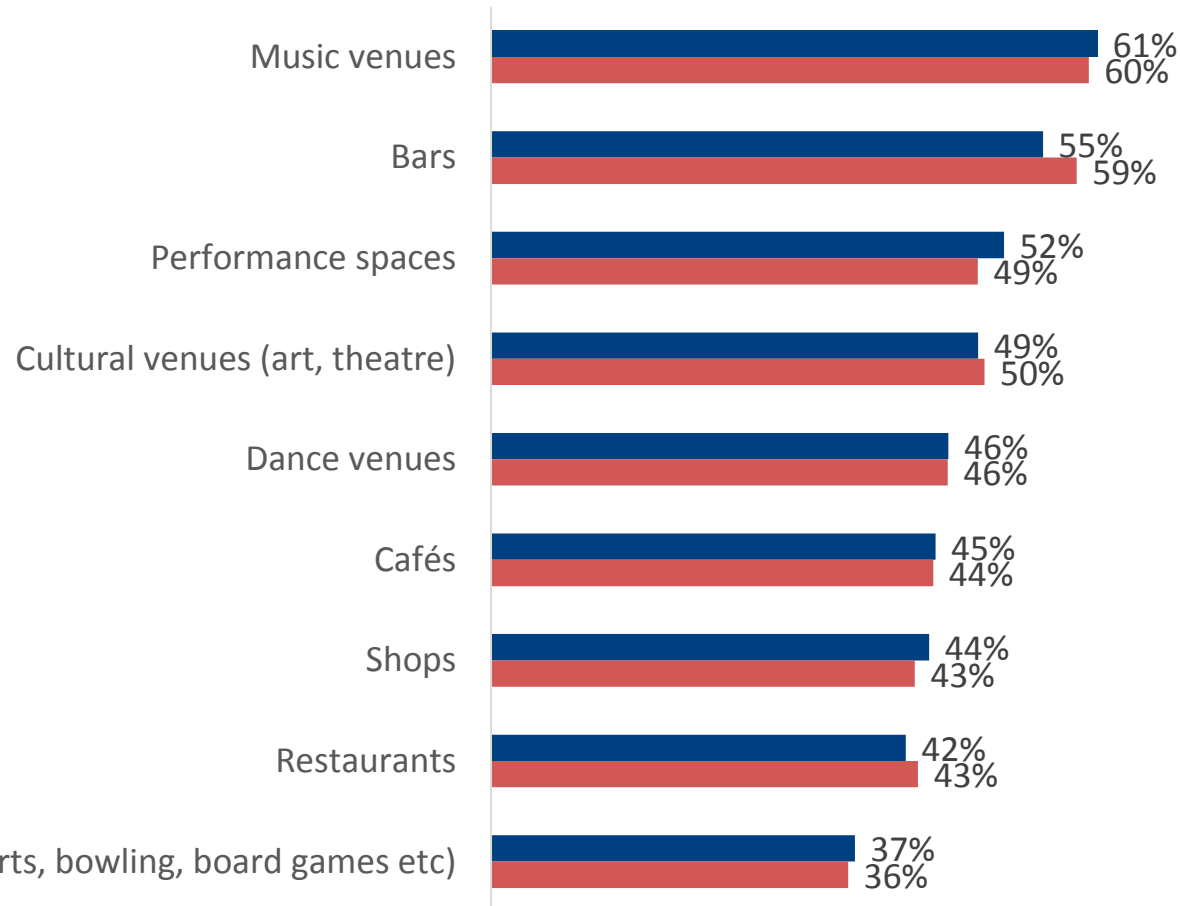
Males more likely to avail of services than females

18-34 year-olds more likely to avail of services than over 50s

Those living in Dublin more than 5 years would be less likely to use services at this time than others

If service was available from 12 midnight to 3am, how likely would you personally be to use each of the following?

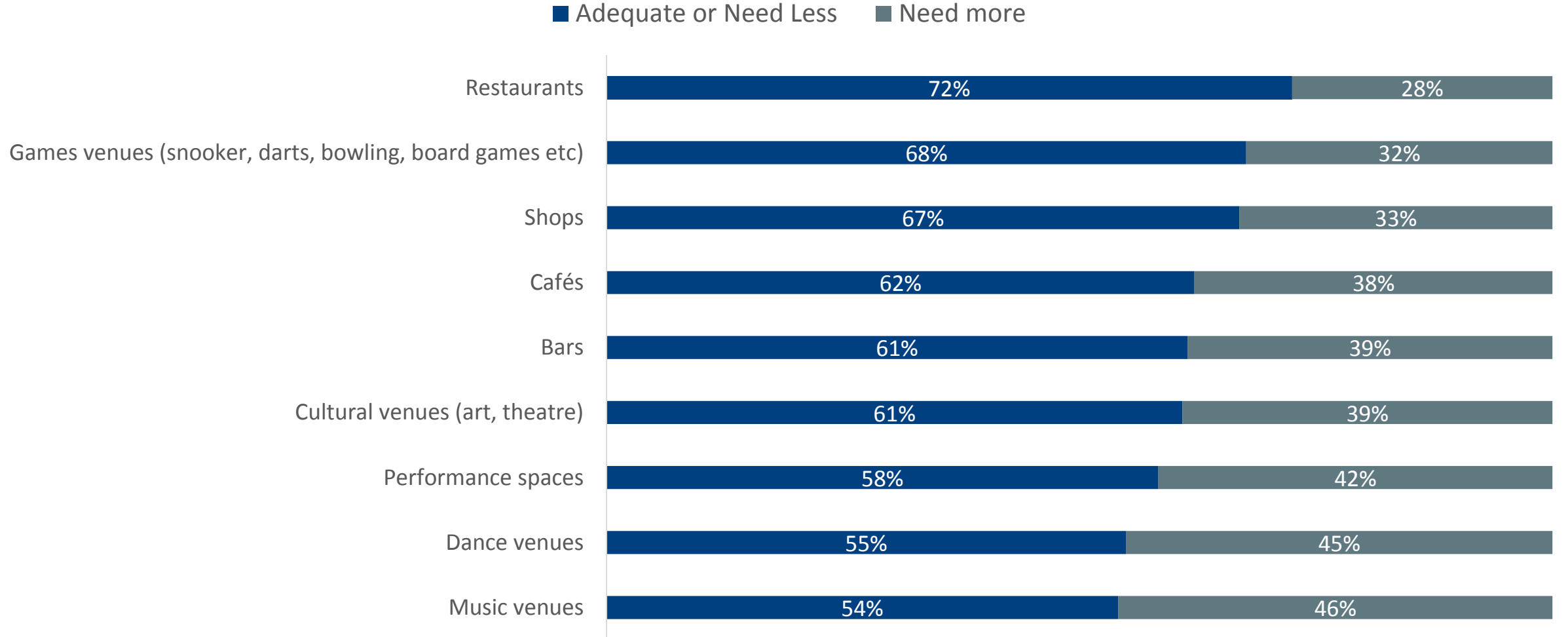
■ With children in household ■ No children in household



No significant differences between families with children and others

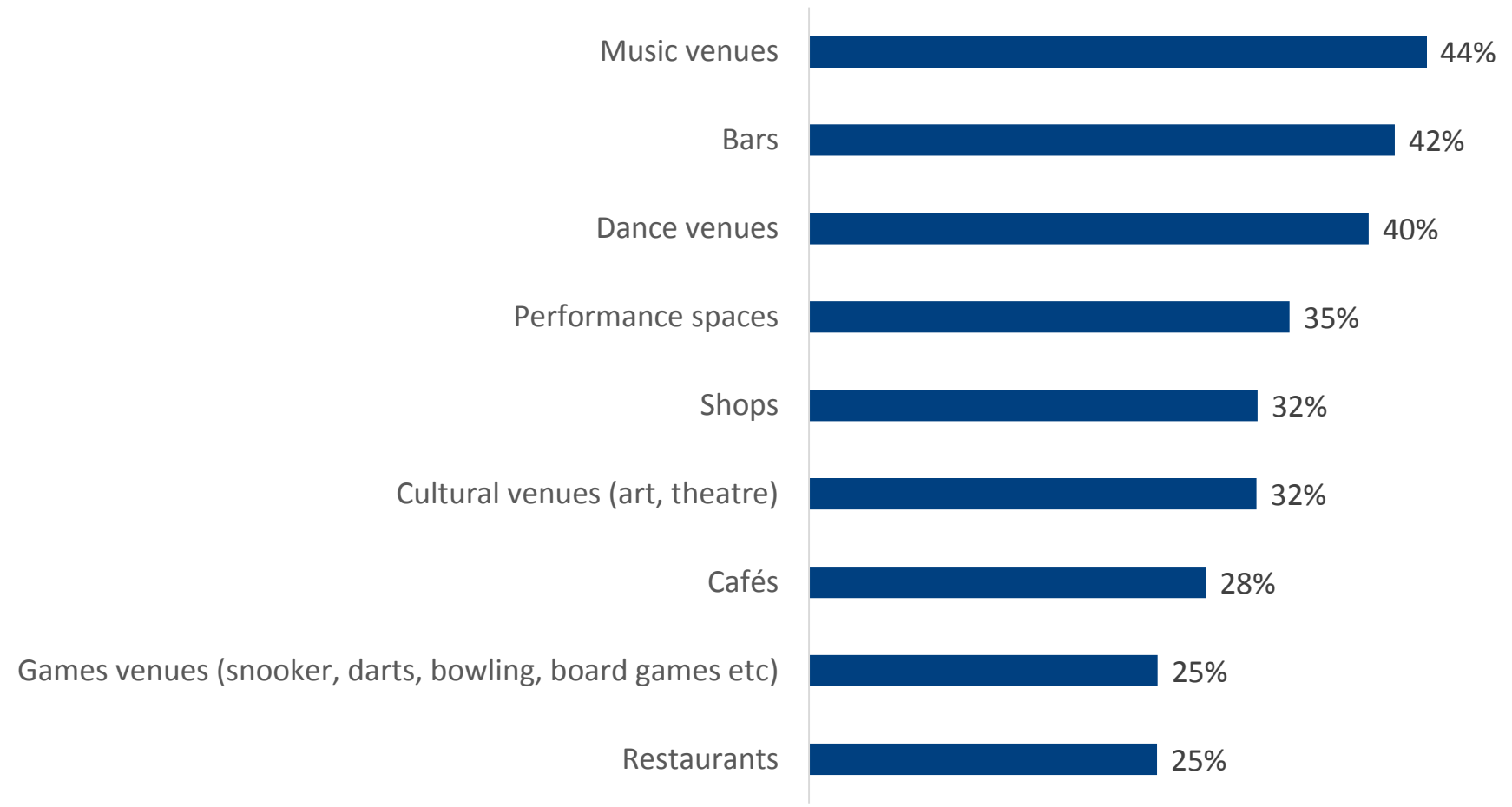
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Thinking of the current range of night-time (3am to 6am) facilities available in Dublin, how do you rate each one's availability?



N=1,134+

If service was available from 3am to 6am, how likely would you personally be to use each of the following?
% somewhat or very likely to use

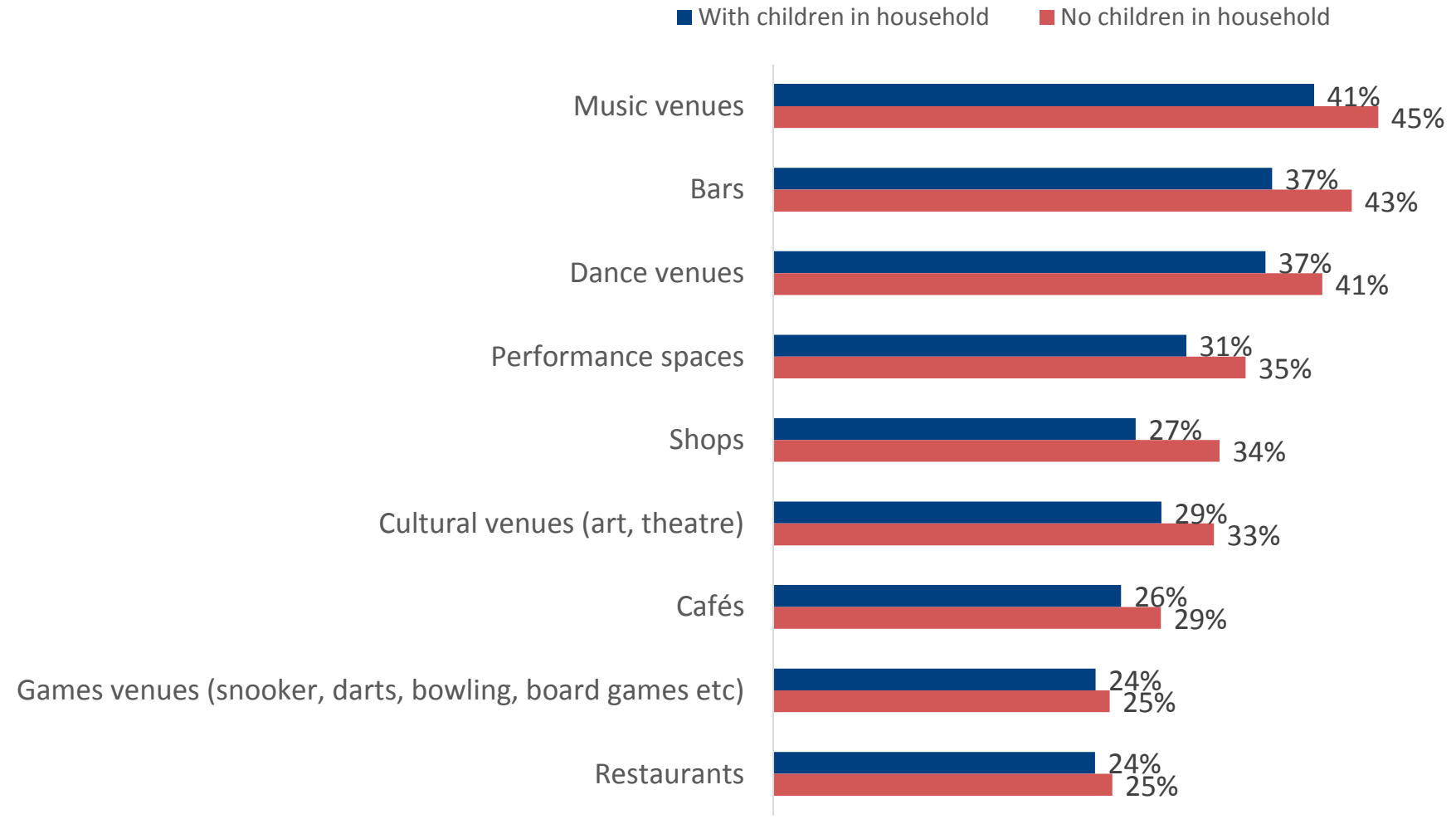


Males more likely to avail of services than females

18-34 year-olds more likely to avail of services than over 50s

Those living in Dublin more than 5 years would be less likely to use services at this time than others

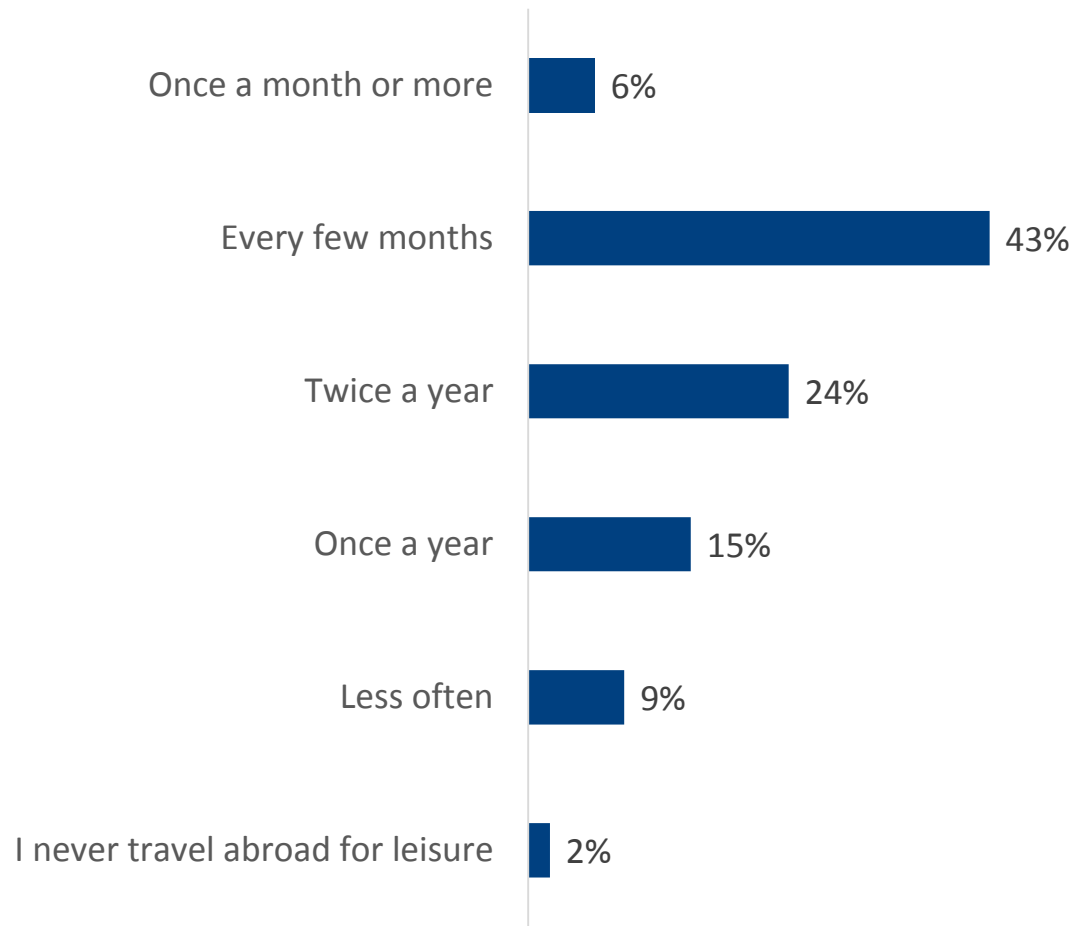
If service was available from 3am to 6am, how likely would you personally be to use each of the following?



No significant differences between those with children in the household and others, although the pattern suggests that those without children in the household would be more likely to engage in all activities between 3am and 6am

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How often, if ever, do you travel abroad for leisure?



N=1,184

- 18-34 year-olds are more likely than others to travel abroad at least every few months (65%)
- Those with children in the household are more likely than others to travel abroad once a year (25%).
- Those with no children in the house are more likely to travel abroad at least every few months (53%)
- Those with more than €1,000 disposable monthly income are more likely to travel abroad at least every few months (70%)

How does Dublin's nightlife compare with the nightlife in cities you have visited abroad?



■ Much poorer ■ Somewhat poorer ■ About the same ■ Somewhat better ■ Much better

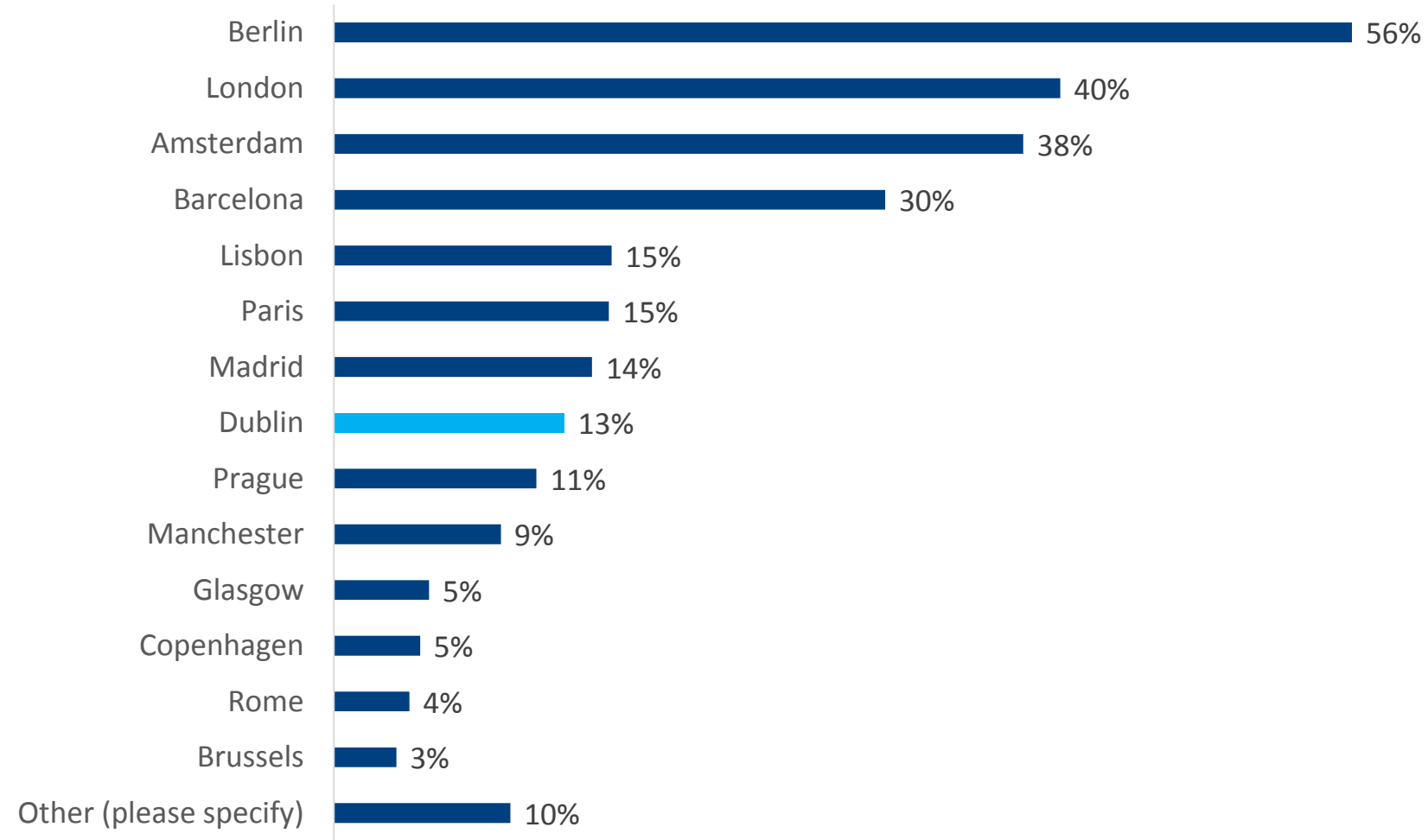
73% rate Dublin's nightlife poorer, 10% rate Dublin's nightlife better

Dublin's nightlife is rated more positively by comparison among older age groups

Those living in Dublin 1 to 5 years more likely to rate Dublin's nightlife much poorer by comparison

N=990 who have travelled abroad for leisure and have a basis for comparison

What are the best European cities for nightlife in your opinion? % selecting in top 3



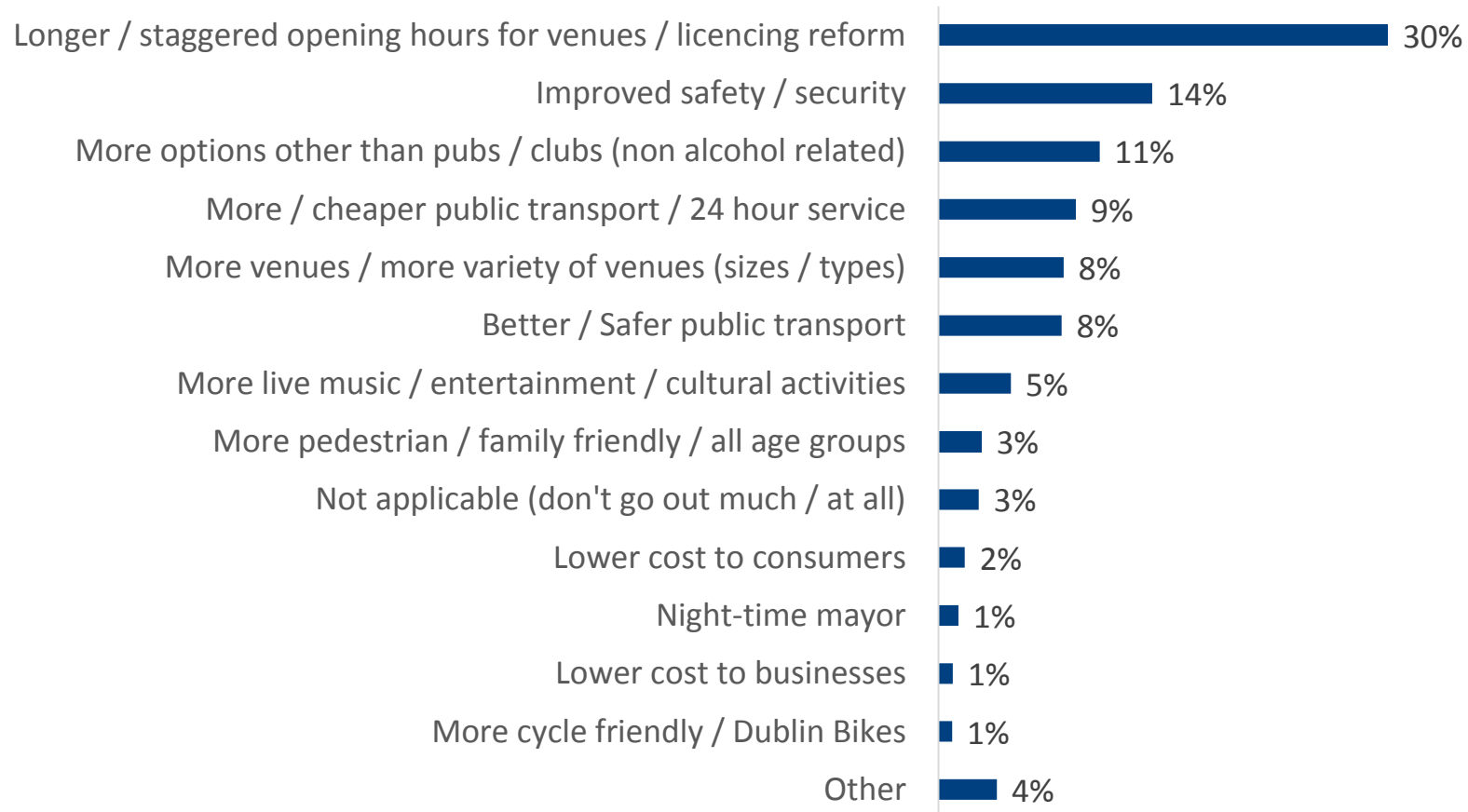
Berlin, London and Amsterdam were the cities most commonly selected in the top 3

13% of respondents placed Dublin in their top 3 European cities for nightlife

Budapest and Edinburgh were the two most common “Other” cities specified as being among the best in Europe for nightlife

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What are your suggestions for improving or adding to night-time activities in Dublin?



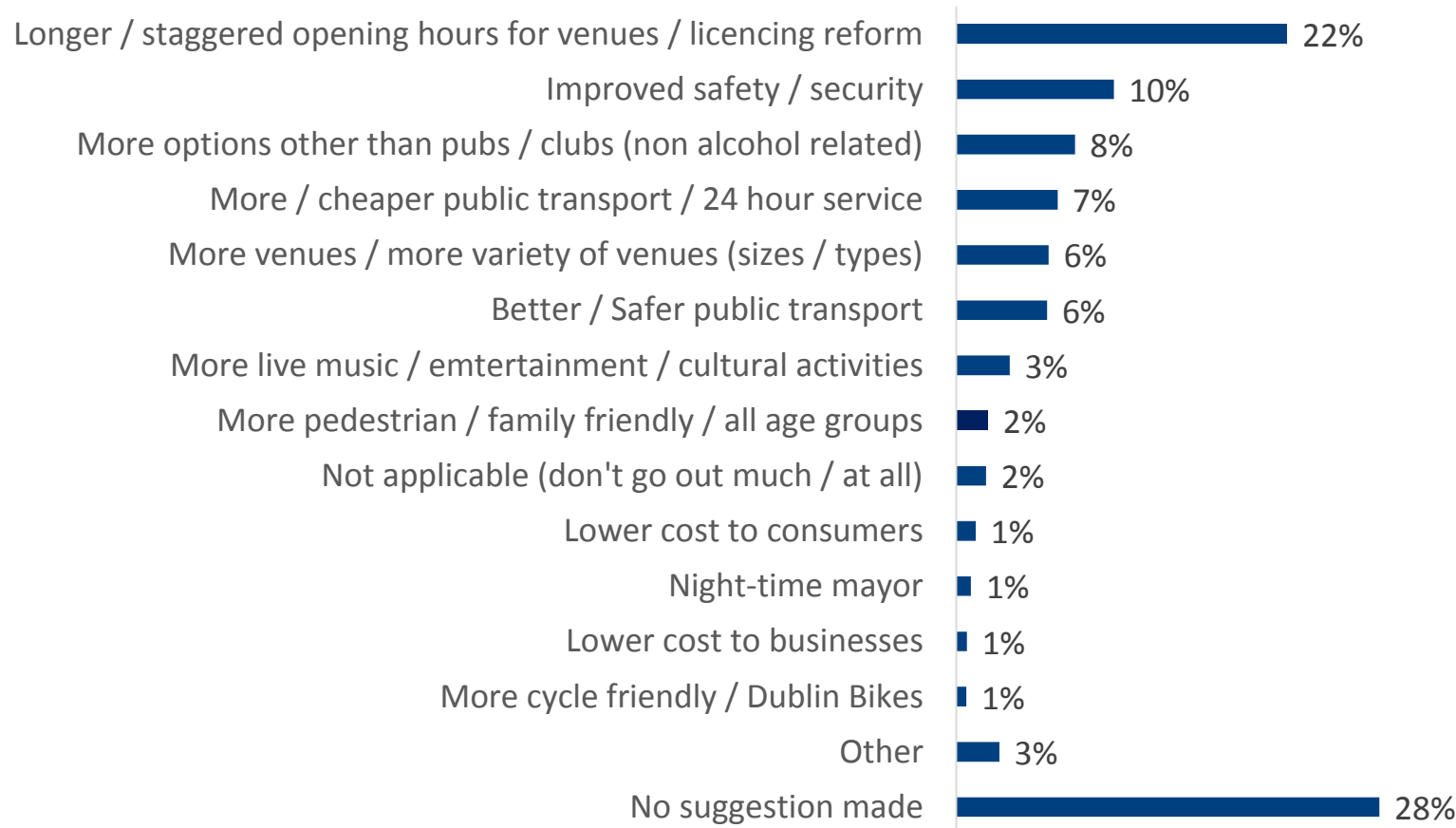
Males were more likely than females to suggest “Longer / staggered opening hours for venues / licencing reform”

Females were more likely to suggest “More options other than pubs / clubs (non alcohol related)”

Younger respondents were more likely to suggest “Longer / staggered opening hours for venues / licencing reform”

Older respondents were more likely to suggest “Improved safety / security”

What are your suggestions for improving or adding to night-time activities in Dublin?



Males were more likely than females to suggest “Longer / staggered opening hours for venues / licencing reform”

Females were more likely to suggest “More options other than pubs / clubs (non alcohol related)”

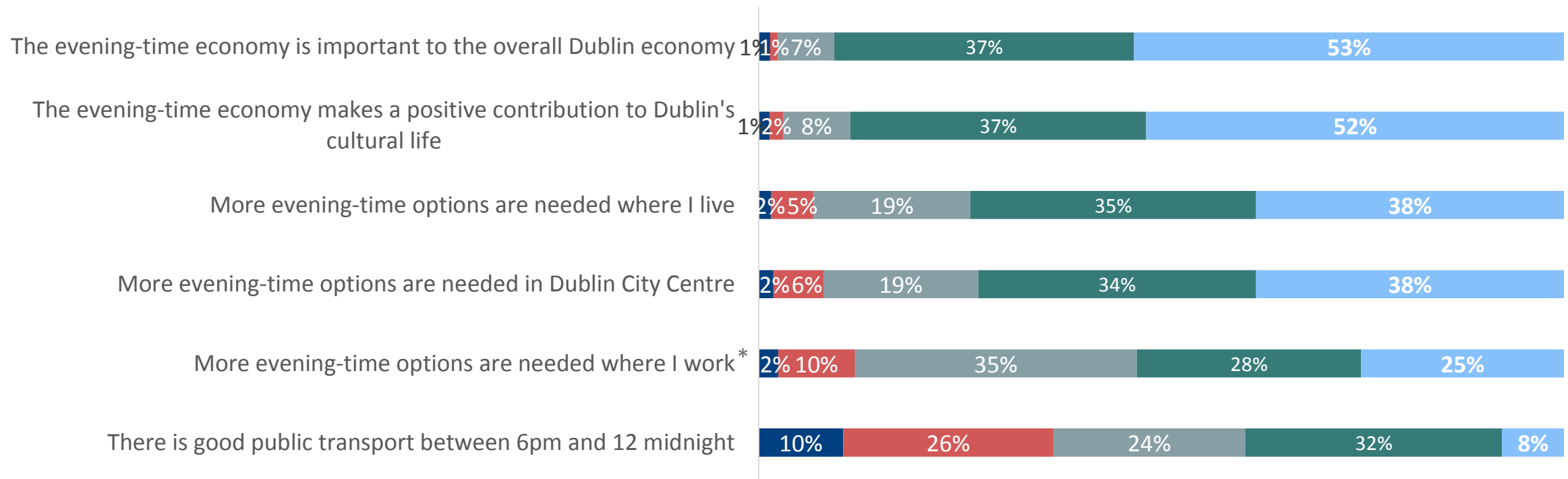
Younger respondents were more likely to suggest “Longer / staggered opening hours for venues / licencing reform”

Older respondents were more likely to suggest “Improved safety / security”

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Thinking about the evening-time economy in Dublin (between the hours of 6pm and 12 midnight), please indicate your level of agreement with each of the following statements:

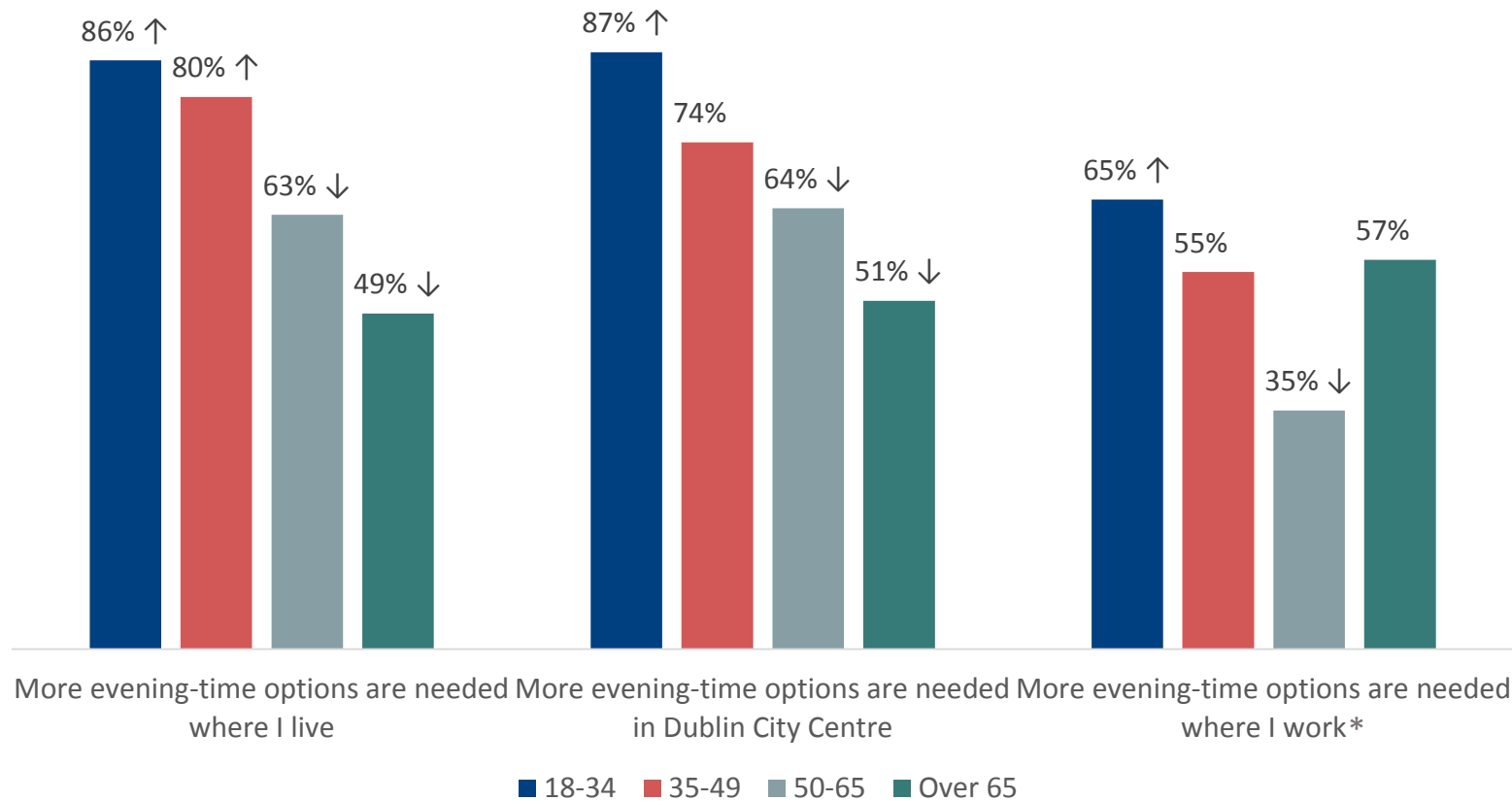
■ Strongly disagree
 ■ Disagree
 ■ Neutral
 ■ Agree
 ■ Strongly agree



* N=864 in employment

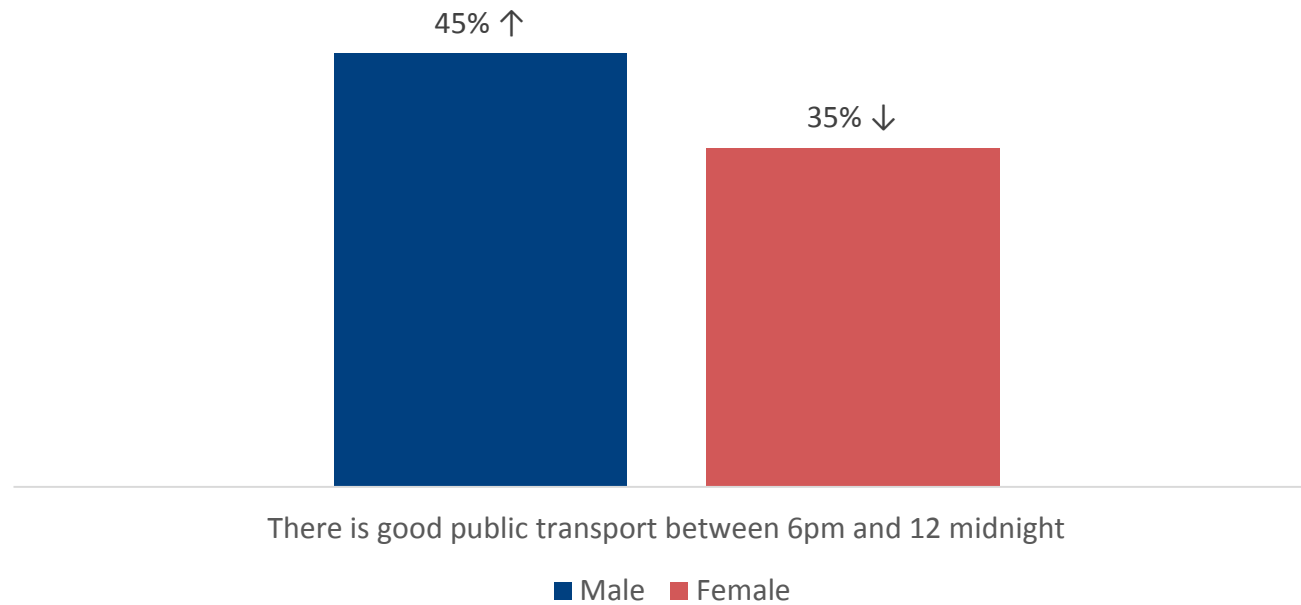
N=1,173

Thinking about the evening-time economy in Dublin (between the hours of 6pm and 12 midnight)



Younger respondents were more likely to feel that more evening time options are needed

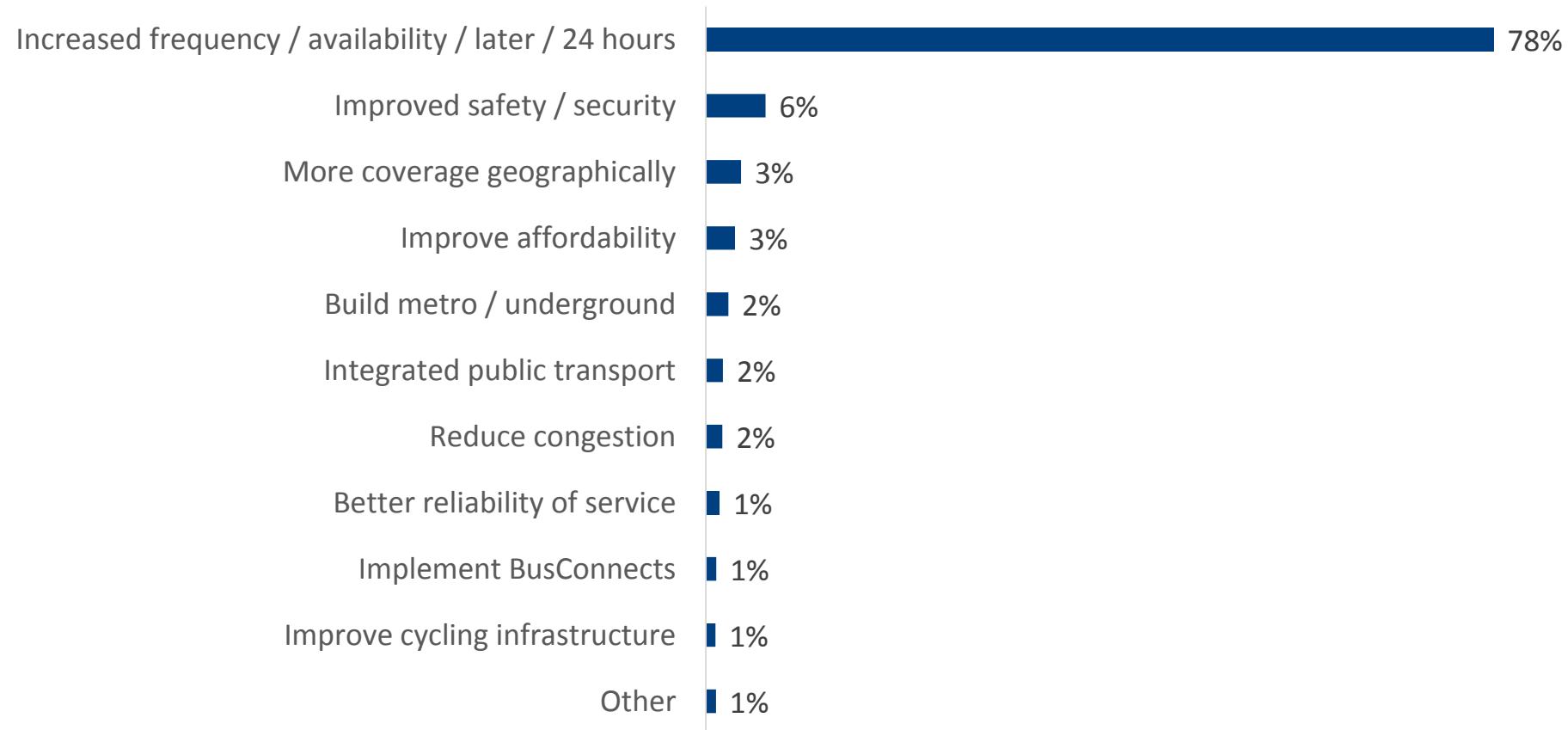
Thinking about the evening-time economy in Dublin
(between the hours of 6pm and 12 midnight)



Females were less likely to agree that there is good public transport in Dublin between 6pm and 12 midnight

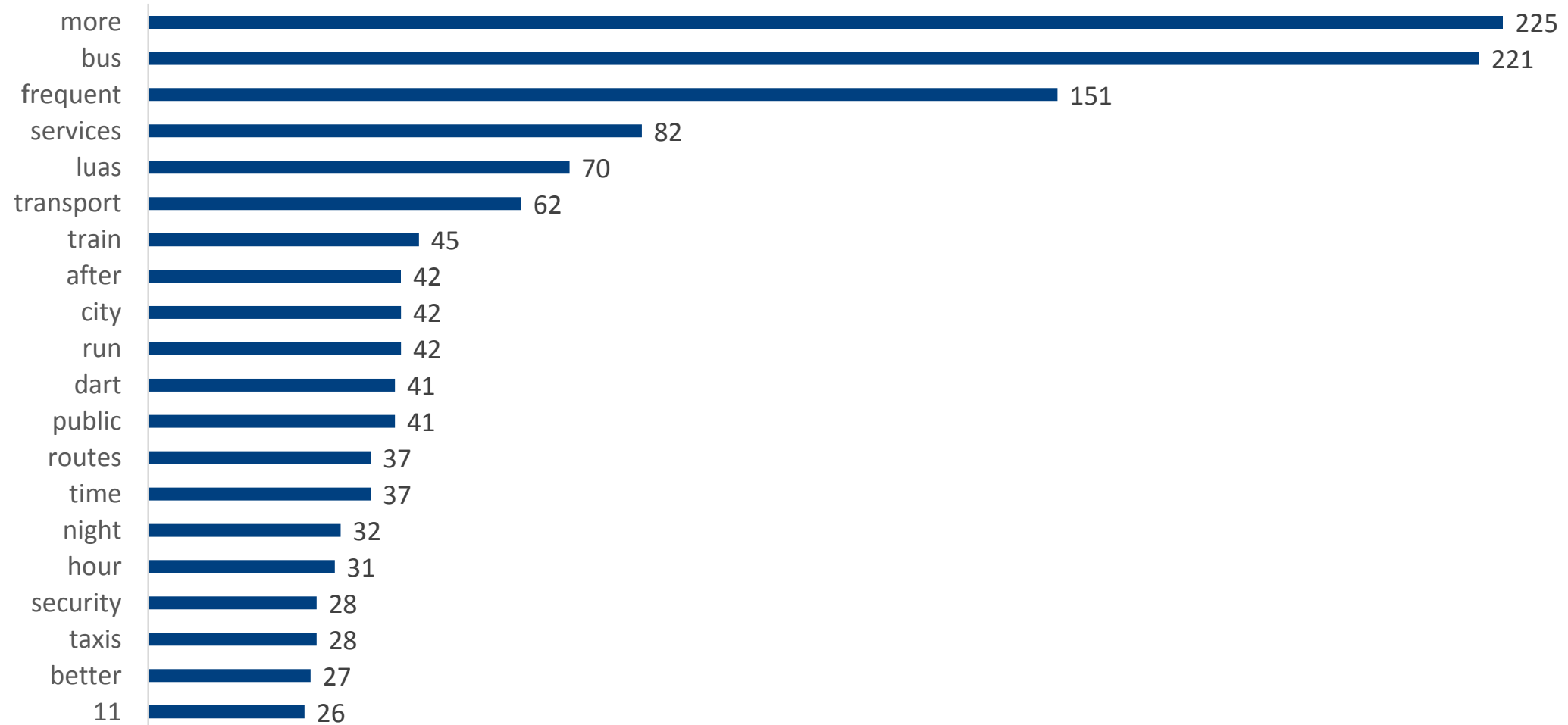
I.	Summary of Results	2
II.	Background and Respondent Profile	8
III.	Engaging in Activities at Night	14
IV.	Barriers to Going Out More at Night	17
V.	Priorities for Night-Time Experience	21
VI.	Availability & Demand 12am-3am	25
VII.	Availability & Demand - 3am-6am	29
VIII.	Travel & International Comparisons	33
IX.	Suggestions for Improving Night-Time Activities	37
X.	Perceptions of Evening-Time Economy - 6pm-12am	40
XI.	Improving Public Transport - 6pm-12am	44
XII.	Perceptions of Night-Time Economy -12am-6am	47
XIII.	Improving Public Transport - 12am-6am	50
XIV.	Night-Time Manager	53
XV.	Night-Time Work	56

What would improve public transport for you between 6pm and 12 midnight?



N=394 who disagree that there is good public transport at this time

What would improve public transport for you between 6pm and 12 midnight? word count - top 20 words

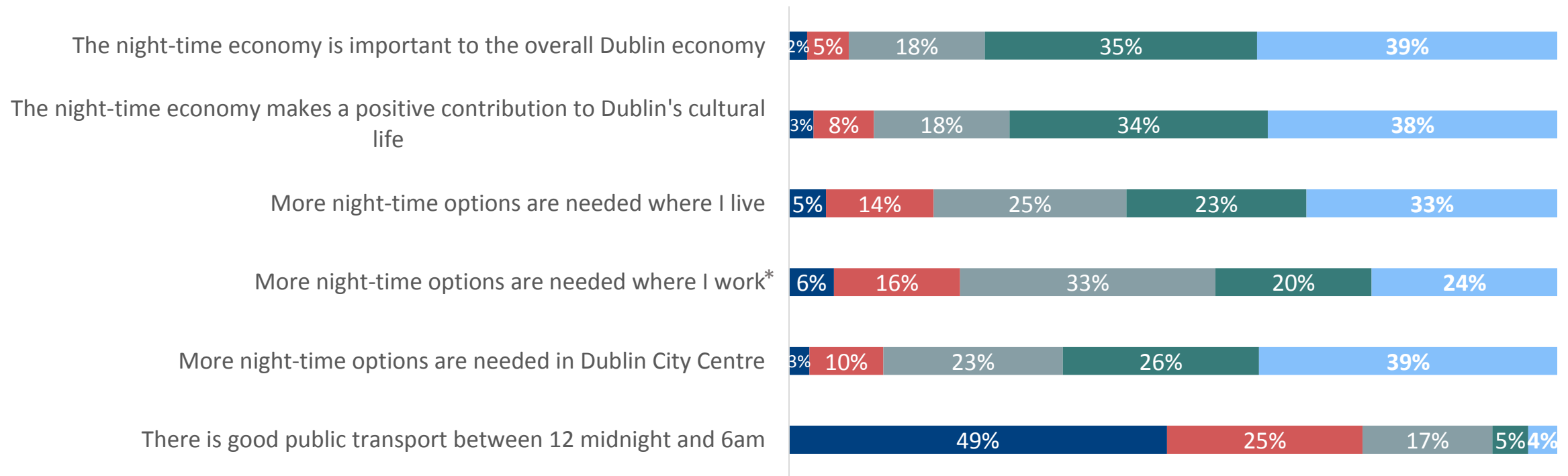


N=394 who disagree that there is good public transport at this time

I.	Summary of Results	2
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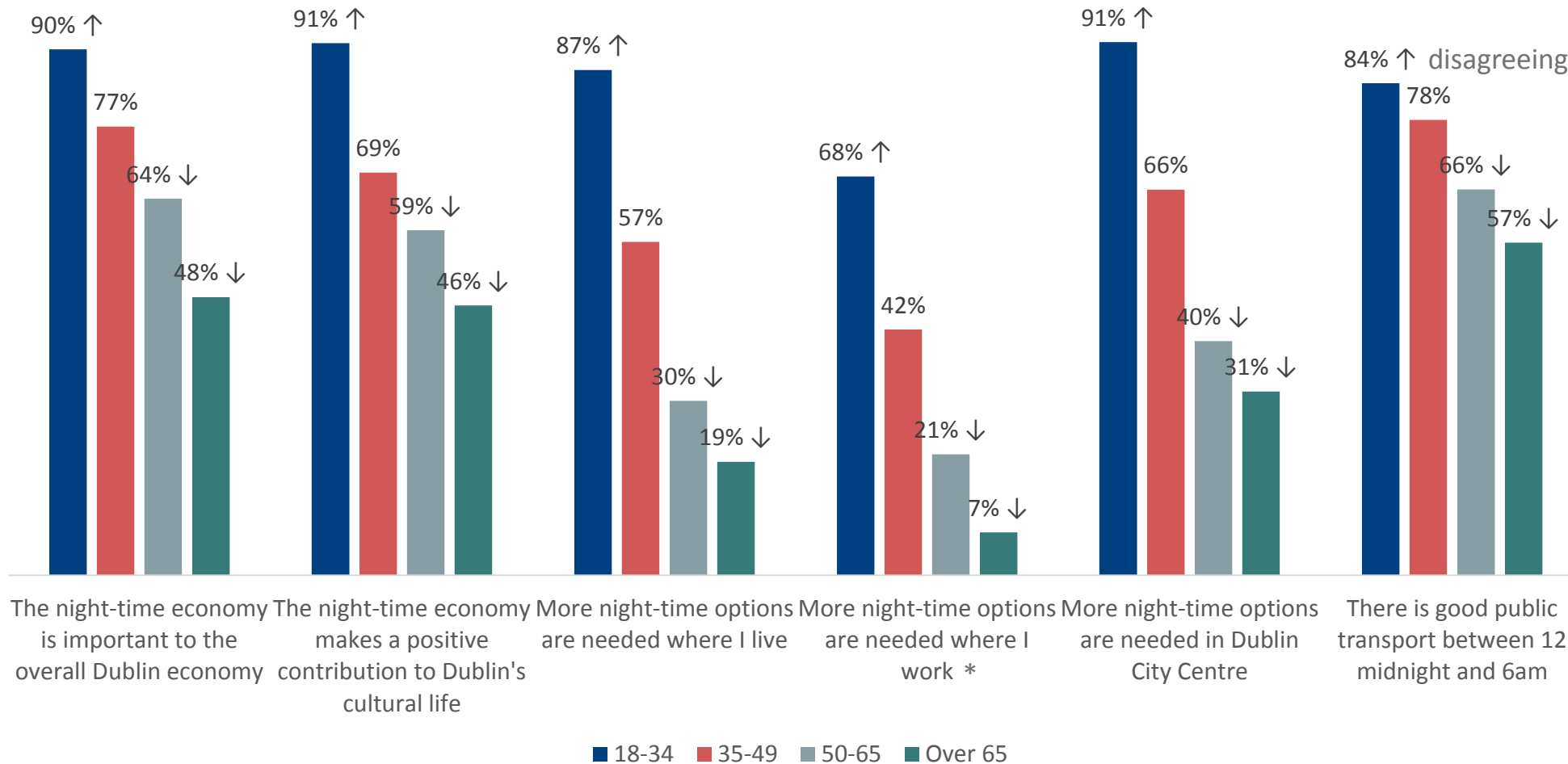
Thinking about the night-time economy in Dublin (between the hours of 12 midnight and 6am), please indicate your level of agreement with each of the following statements:

■ Strongly disagree
 ■ Disagree
 ■ Neutral
 ■ Agree
 ■ Strongly agree



* N=836 in employment answered this question

Thinking about the night-time economy in Dublin (between the hours of 12 midnight and 6am)



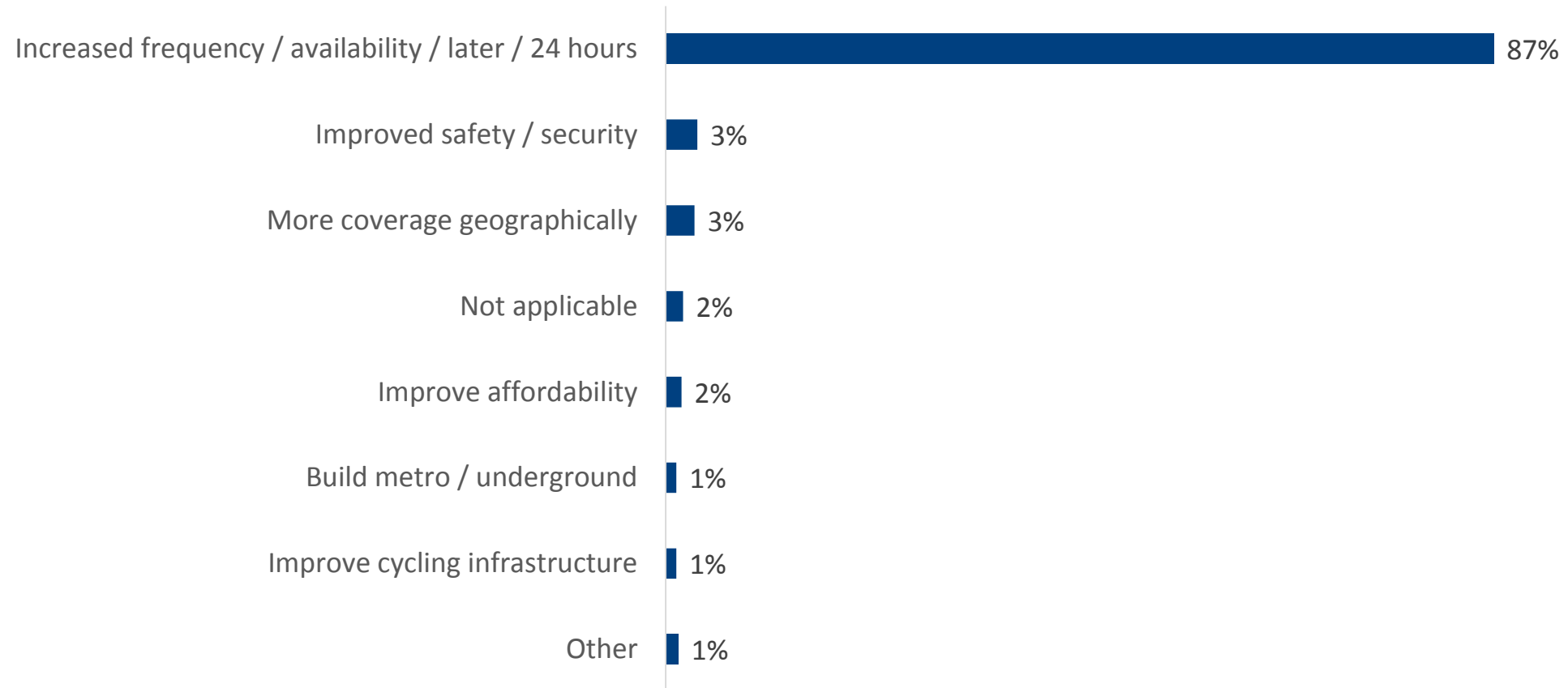
Younger respondents more likely to agree with all statements (disagree with public transport statement)

* N=836 in employment

N=1,173

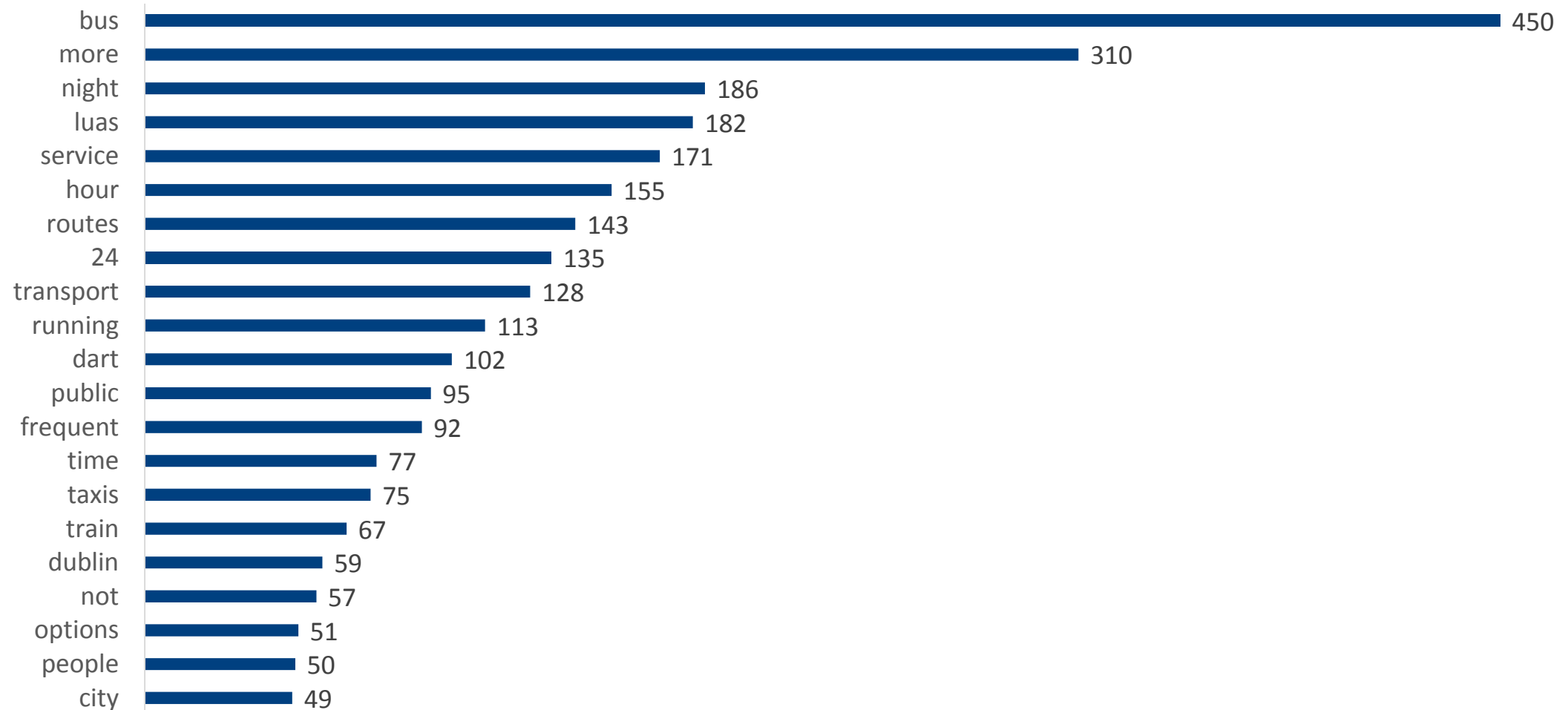
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XIII.	Improving Public Transport - 12am-6am	50
XIV.	Night-Time Manager	53
XV.	Night-Time Work	56

What would improve public transport for you between 12 midnight to 6am?



N=765 who disagree that there is good public transport at this time

What would improve public transport for you between 12 midnight and 6am? word count - top 20 words

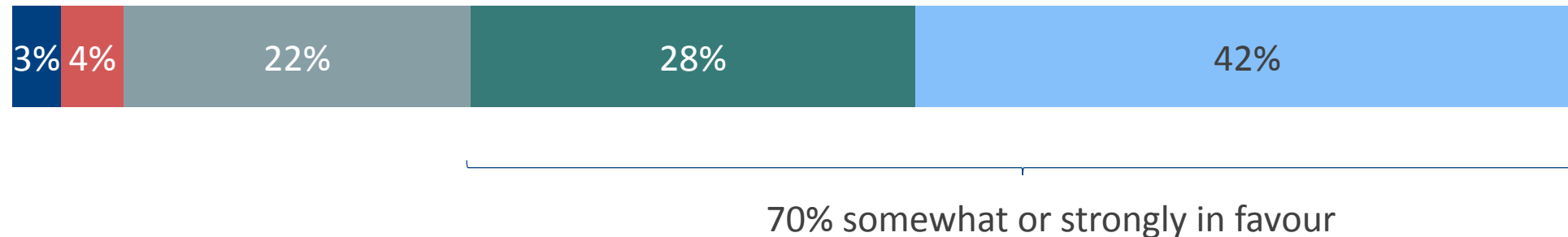


N=765 who disagree that there is good public transport at this time

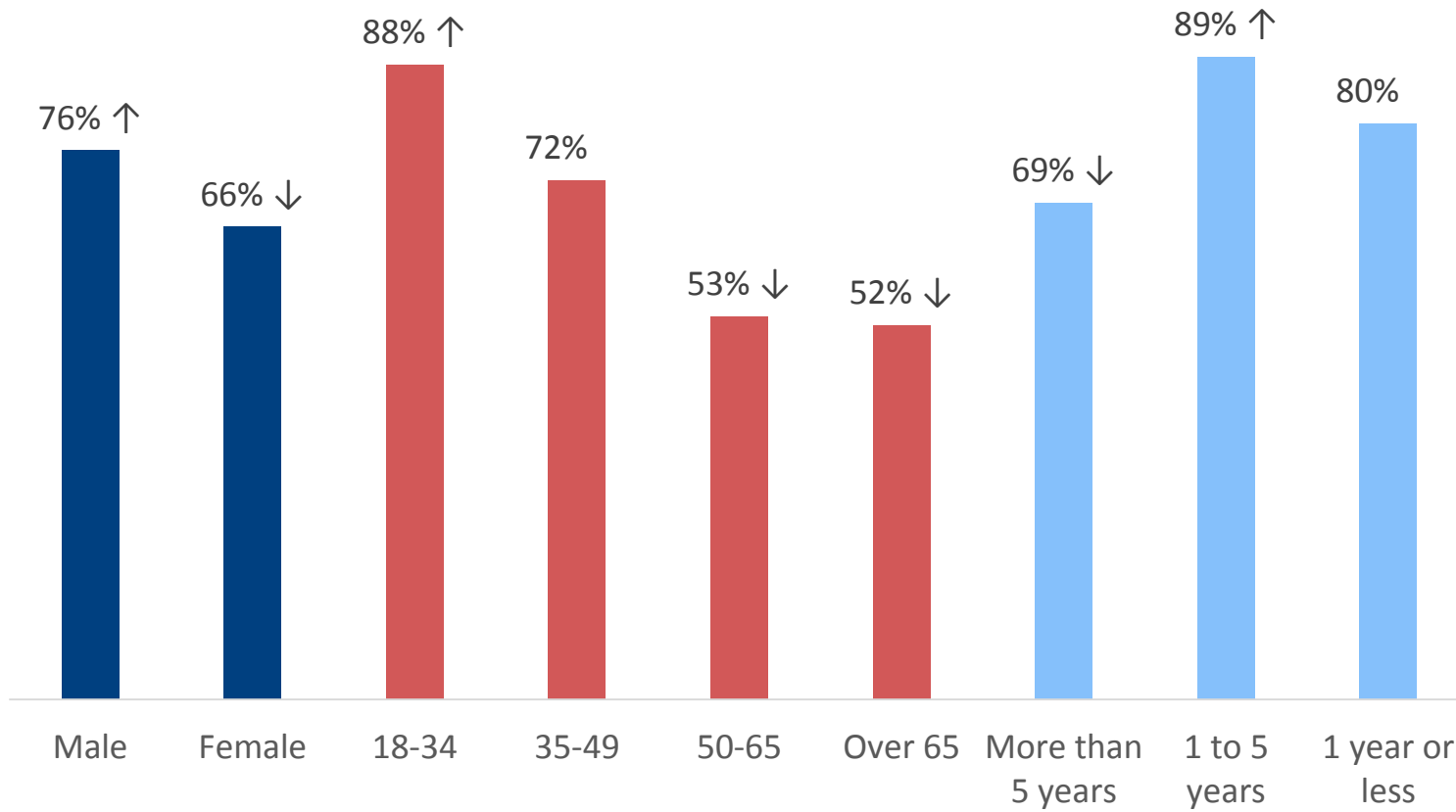
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Some cities internationally have a dedicated night-time manager, funded directly by specific taxes / rates. Would you be in favour of or against having such a manager for Dublin?

■ Strongly against ■ Somewhat against ■ Not sure ■ Somewhat in favour ■ Strongly in favour



In favour of a night-time manager for Dublin

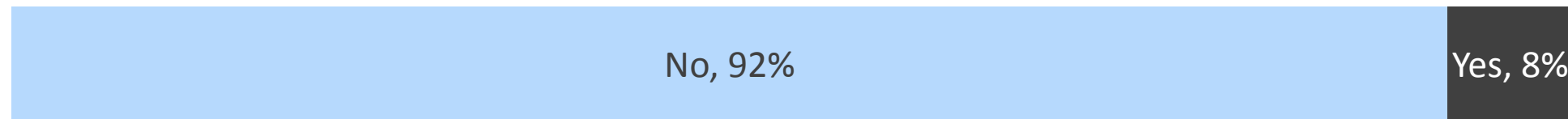


Support for a night-time manager for Dublin is higher than average among males, among 18 to 34 year olds, and among those living in Dublin 1 to 5 years

Support is lower than average among females, among over 50s, and among those living in Dublin more than 5 years

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Do you work predominantly in the evening (6pm to 12 midnight) / at night (12 midnight to 6am)? (apart from overtime in a day-time job)



18-34 year-olds, those in the C2DE social grade, and those with up to secondary education were more likely than average to work in the evening or at night

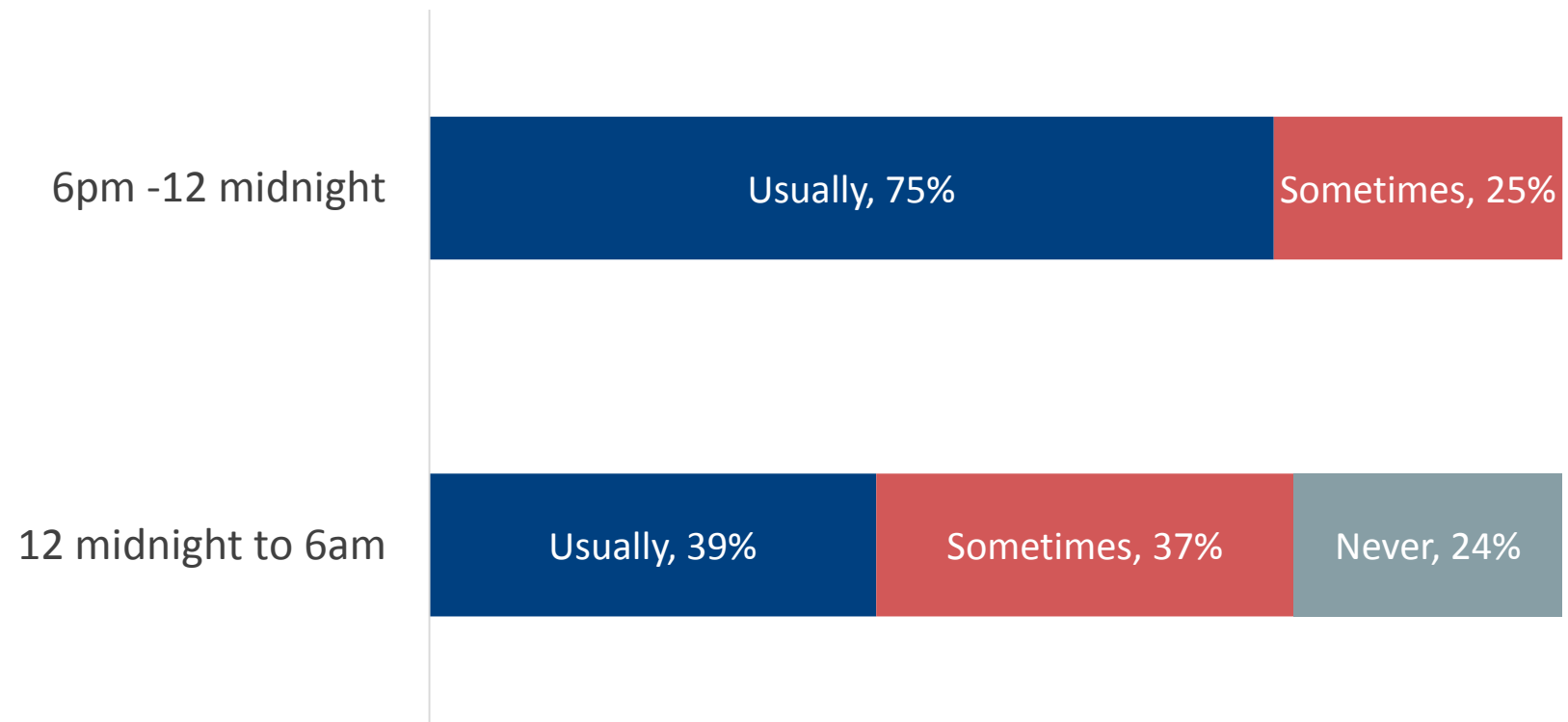
Those with less than €1,000 monthly gross income were more likely to work in the evening or at night

Those working predominantly at night have lower average monthly income than others

Base = 845 full-time or part-time workers. Does not include students or others.

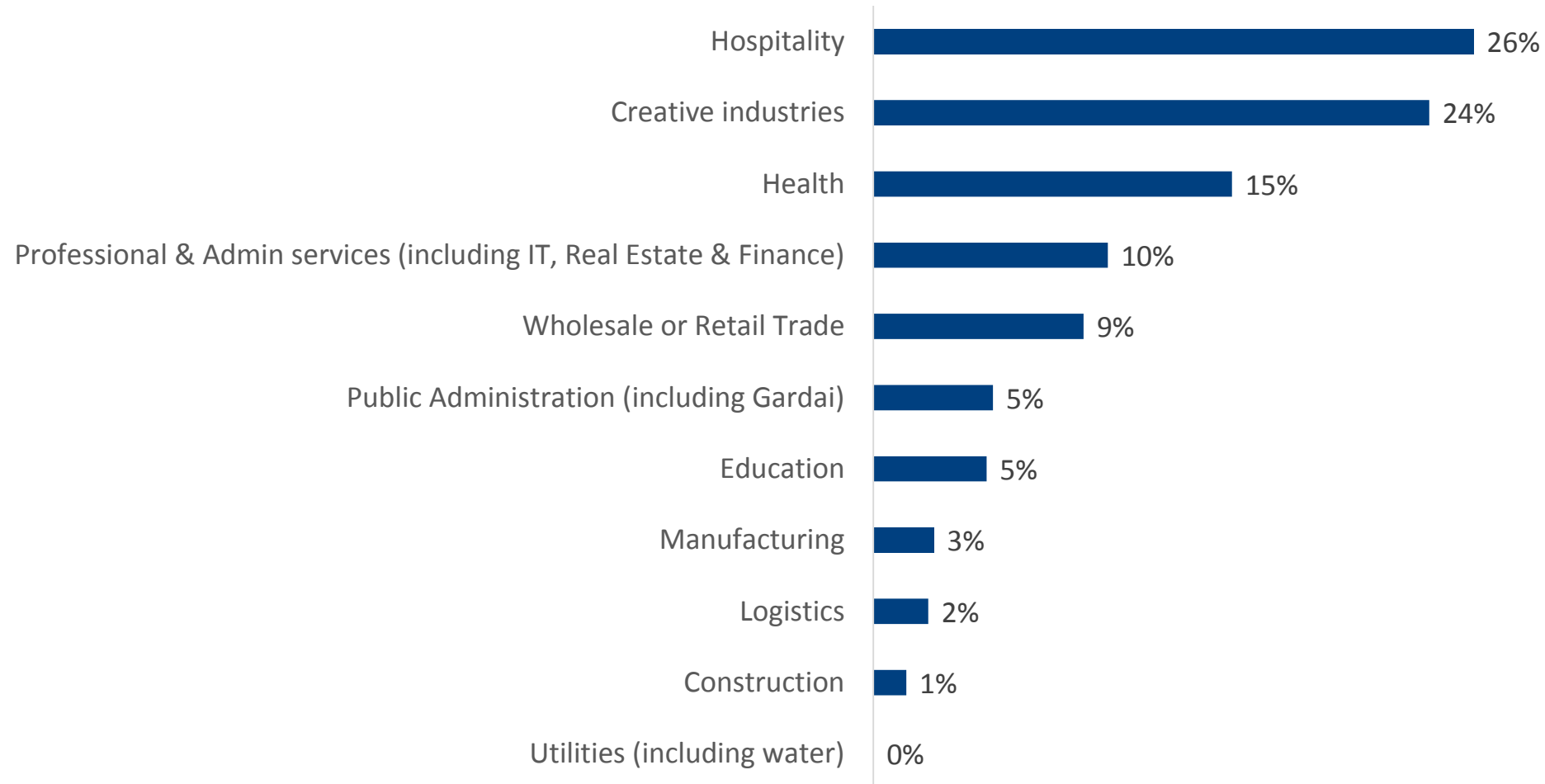
N=845

What evening / night time hours do you typically work?



N=63 evening / night workers

Which sector do you work in? (evening / night workers only)



N=67 evening / night workers

END

For further information please contact:

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