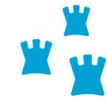


Citizen Survey Report for: Economic Development Plan 2022-2026 Executive Report



Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council



Economic Development Office
Dublin City Council

Report Date: 29/10/2021

Survey Fieldwork: Sept. / Oct. 2021

Report by:



Delve Research
Survey Research & Analysis

www.delve-research.com

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- Online survey, 28th September - 8th October 2021
- 943 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



48%

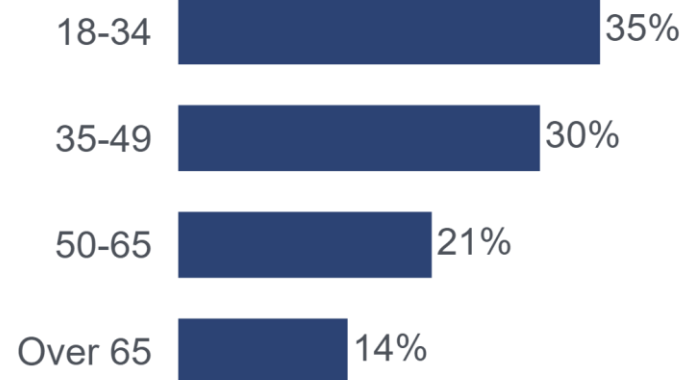


52%

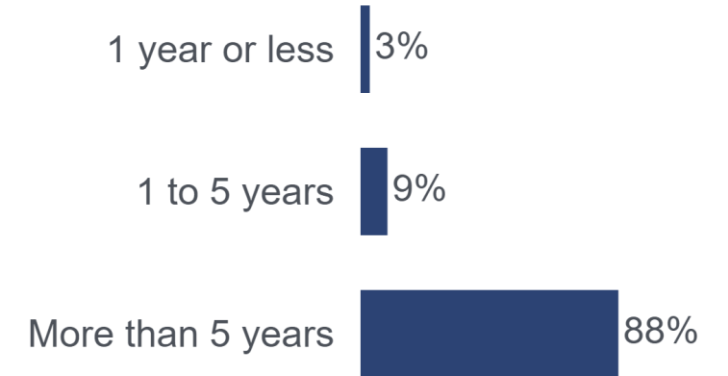


26% with dependent
children in household

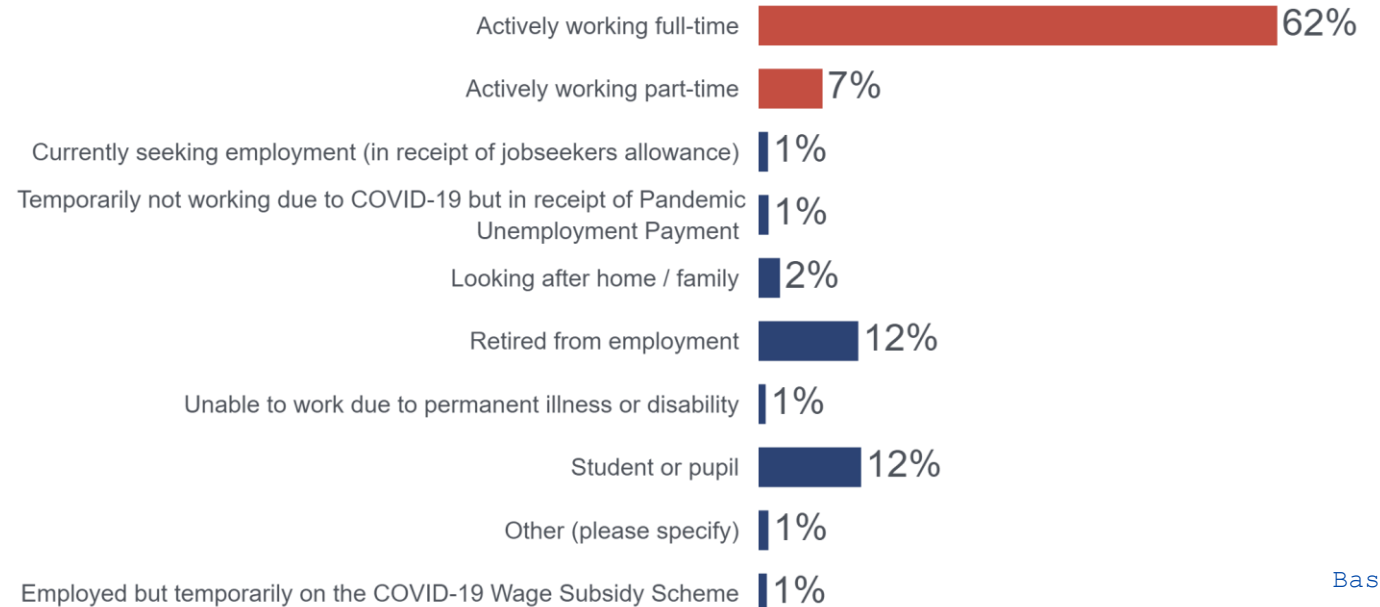
Age Group



Time Living in Dublin



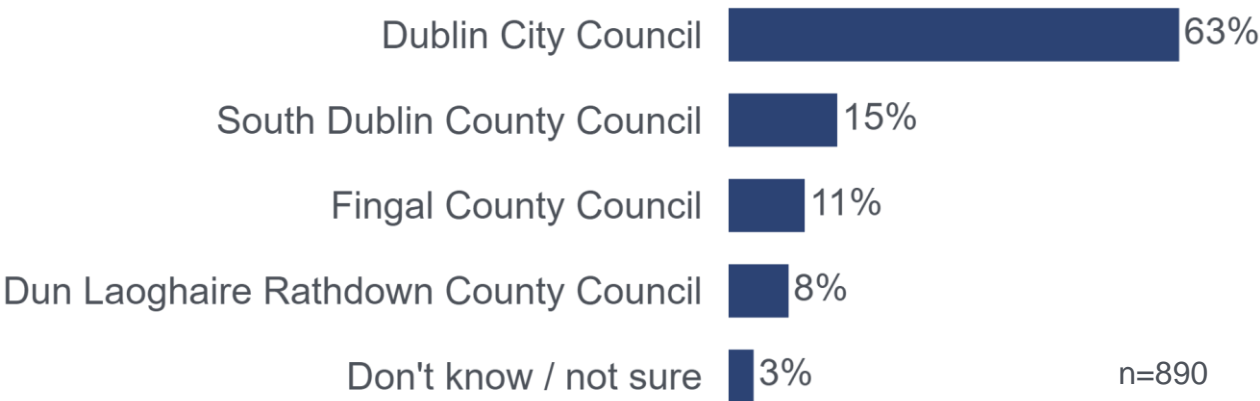
Employment Status



27 nationalities represented on this survey, 89% Irish



Local Authority

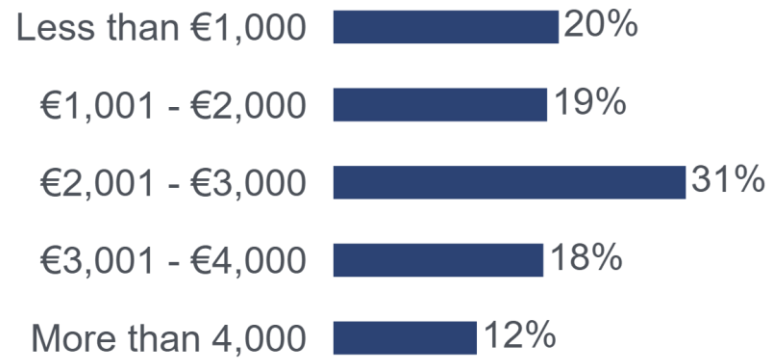


n=890

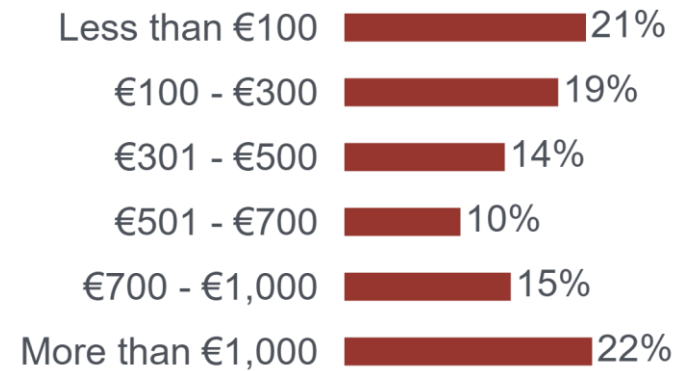
Current Area of Residence

	%
Dublin 1	2%
Dublin 2	2%
Dublin 3	5%
Dublin 4	4%
Dublin 5	5%
Dublin 6	5%
Dublin 6W	4%
Dublin 7	8%
Dublin 8	10%
Dublin 9	8%
Dublin 10	1%
Dublin 11	5%
Dublin 12	7%
Dublin 13	3%
Dublin 14	5%
Dublin 15	3%
Dublin 16	2%
Dublin 17	1%
Dublin 18	2%
Dublin 20	1%
Dublin 22	1%
Dublin 24	3%
County Dublin	10%
Outside County Dublin	6%
NET	100%

Monthly Income After Taxes, Before Bills



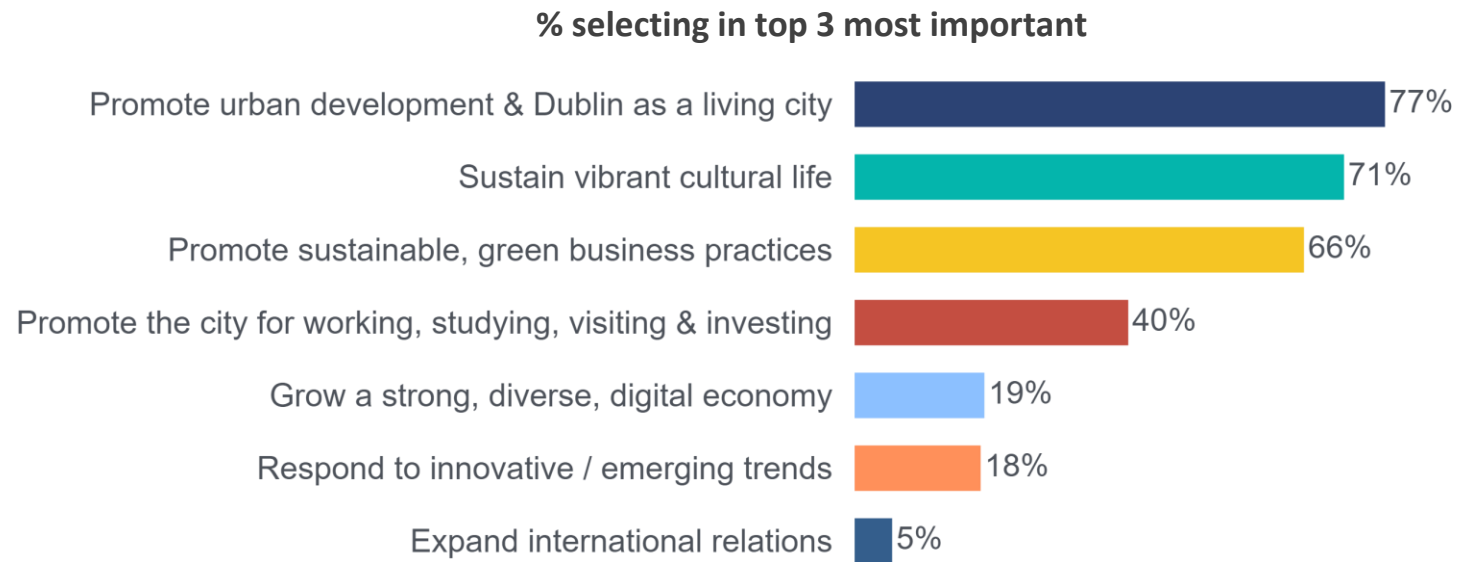
Monthly Disposable Income After Bills Are Paid



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7 Draft Goals

- When presented with the seven draft goals of the Economic Development Plan 2022 to 2026, “Promote urban development & Dublin as a living city” was felt to be among the most important goals by 77% of respondents.



- “Sustain a vibrant cultural life” and “Promote sustainable, green business practices” ranked higher in importance among those aged 18-34.
- “Promote urban development & Dublin as a living city” was selected as the single most important goal by 44% of respondents.

Reason for Choosing Most Important Goal

For each of the goals, the most common reasons given by those selecting a particular goal as the most important were:

goal	top reason
• “Promote urban development & Dublin as a living city”	<i>Housing needs to be addressed</i>
• “Promote sustainable, green business practices”	<i>Because of the climate crisis / no future otherwise</i>
• “Sustain vibrant cultural life”	<i>Cultural life has been neglected/too much emphasis on business</i>
• “Promote the city for working, studying, visiting & investing”	<i>This is the foundation / everything else flows from this</i>
• “Grow a strong, diverse digital economy”	<i>Critical for business / innovation / economy</i>
• “Respond to innovative trends”	<i>Need to remain relevant / move with the times</i>
• “Expand international relations”	<i>Need good international relations to survive / thrive</i>

What is missing from the goals?

- The two themes that respondents felt were missing were “Housing / affordable housing” and “Improve public transport”.

Priorities for Each Goal

- For each of the goals the top priorities were identified as:

goal

- “Promote urban development & Dublin as a living city”
- “Promote sustainable, green business practices”
- “Sustain vibrant cultural life”
- “Promote the city for working, studying, visiting & investing”
- “Grow a strong, diverse digital economy”
- “Respond to innovative trends”
- “Expand international relations”

top priority

- *Repurpose existing spaces & buildings to meet current needs*
- *Prioritise health and well-being of working people*
- *Support arts and cultural spaces*
- *Facilitate attractive public realm*
- *Support affordable business spaces / co-working spaces / enterprise hubs / start-up incubators*
- *Support flexible working solutions*
- *Manage / attract European funding*

Current Working Arrangements

- 39% of respondents who were in employment were working entirely from home

Comparable figures from previous "Your Dublin, Your Voice" surveys:

May 2020: **76%** - working entirely from home

August 2020: **56%** - working entirely from home

- 41% of those in employment were working to a hybrid model

Anticipated Working Arrangements

- 46% of working respondents anticipated that their working arrangements would change in the near future, with the majority (82%) of these anticipating a partial return to the office / site.

Preferred Working Arrangements

- 69% of respondents who were in employment indicated a preference for hybrid working in the medium to long term, with an average of 2.3 days in the office / on-site

Local Spend When at Work in the Office or On-site

- 68% of respondents who were working some or all of the time in the office or on-site purchase lunch from providers in the area

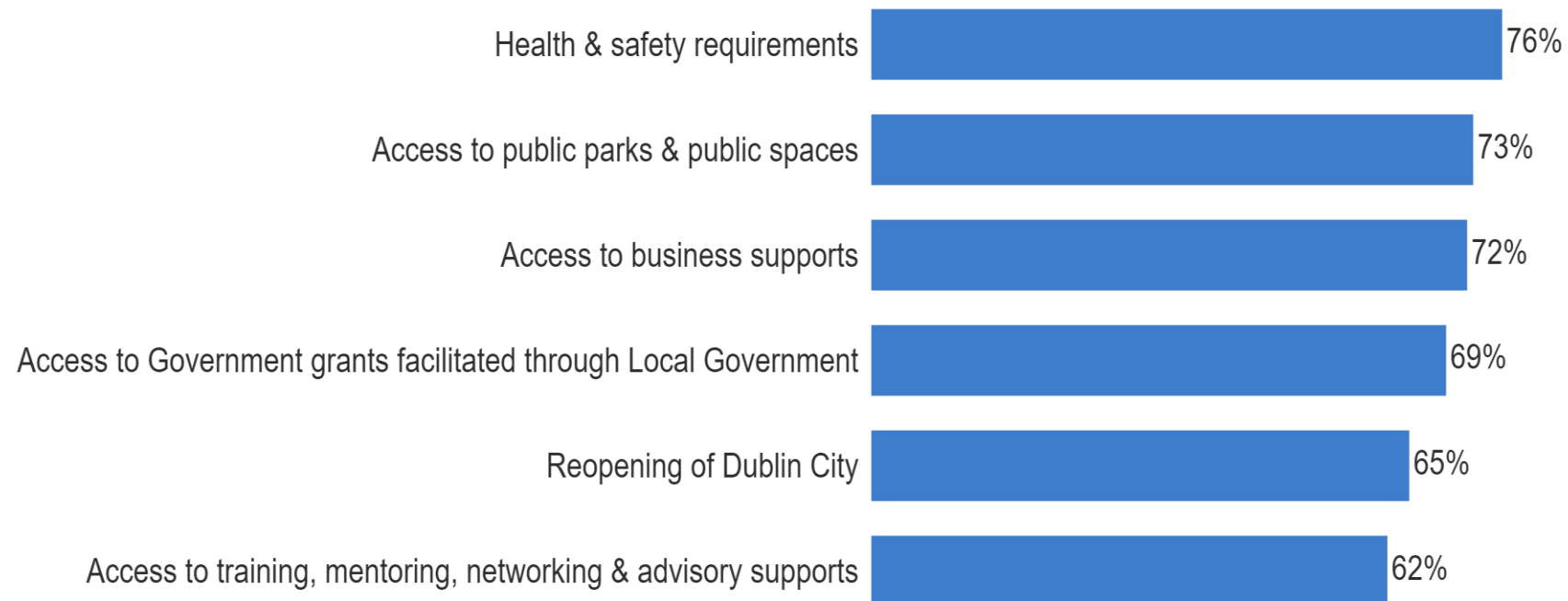
On days when you are at work in the office or on-site, do you do any of the following?



- The most frequent local spend was to purchase take away coffees and refreshments with 46% doing this 3 to 5 times a week.

Local Government Management During COVID-19 Crisis

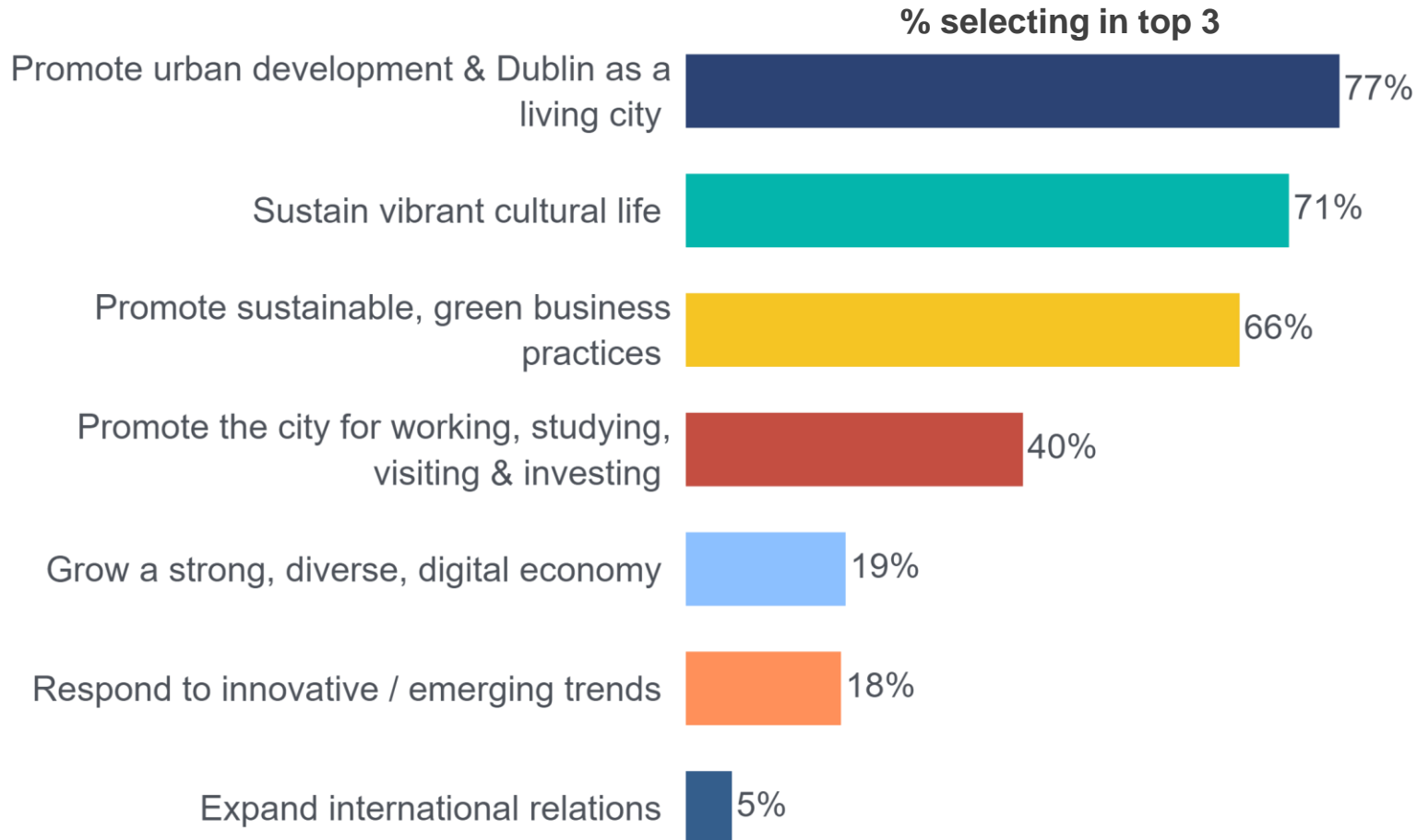
How well do you feel local government has managed the following during the COVID-19 crisis?
% managed well or okay



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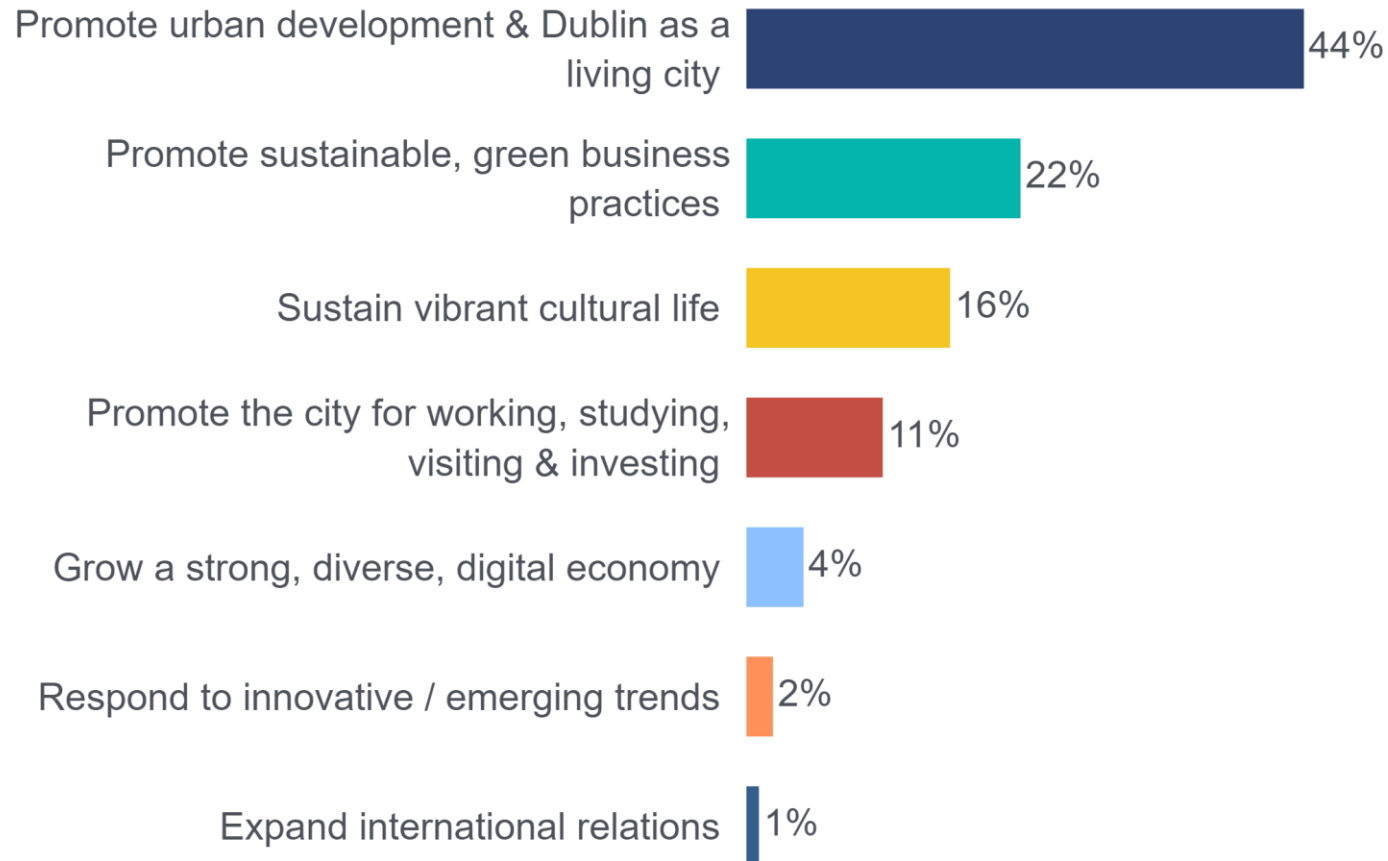
Dublin City Council has developed the following 7 draft goals to be achieved over the lifetime of the Economic Development Plan 2022 to 2026.

Please choose the 3 goals that you feel are most important for the economic development of Dublin City.



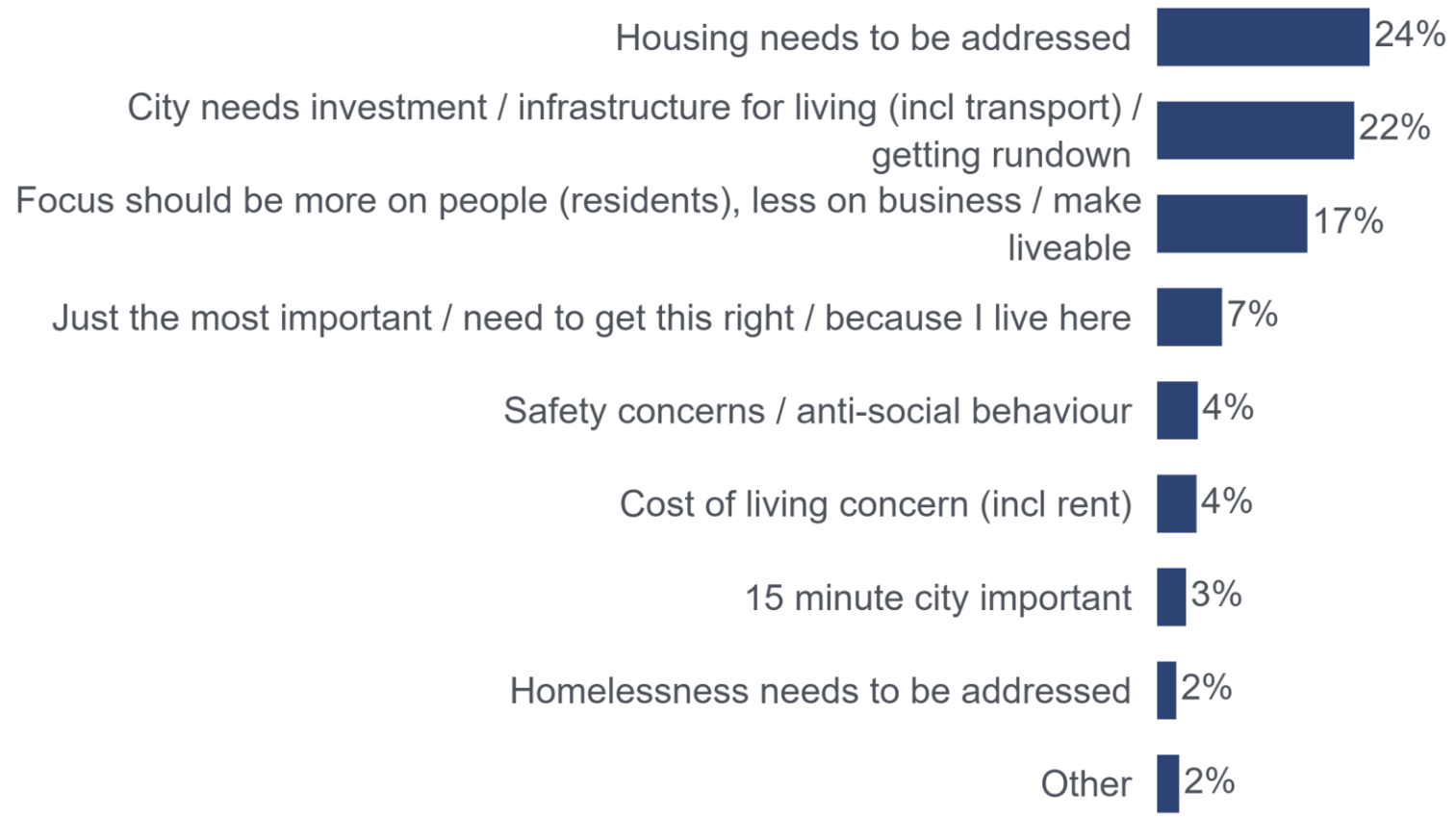
“Sustain vibrant cultural life” and “Promote sustainable, green business practices” were more important for those aged under 50
“Promote the city for working, studying, visiting and investing” was more important among those aged over 50.

From the Top 3 goals you selected, which do you feel is the most important goal?
% selecting



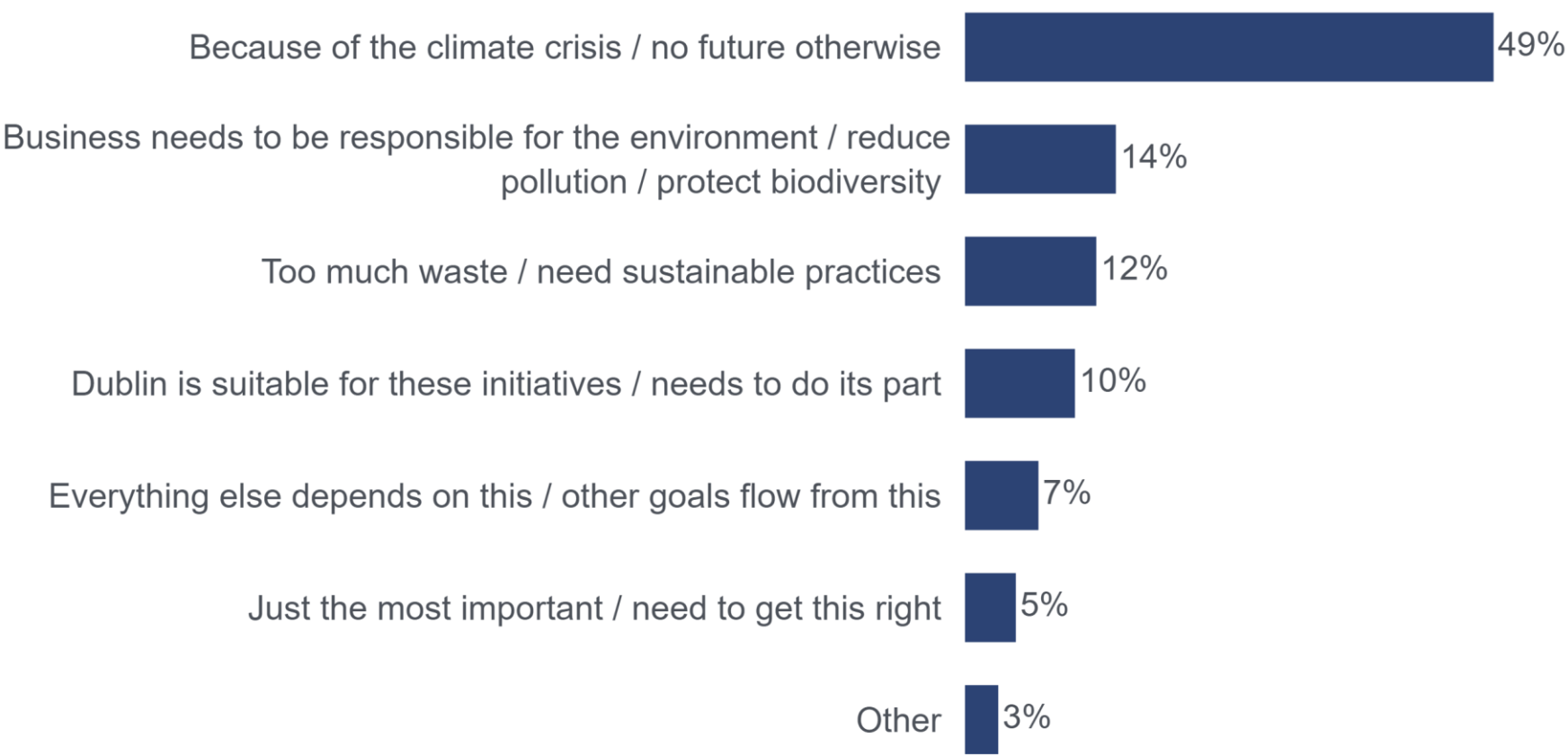
What are your reasons for choosing "Promote urban development & Dublin as a living city" as the most important goal?

reasons classified



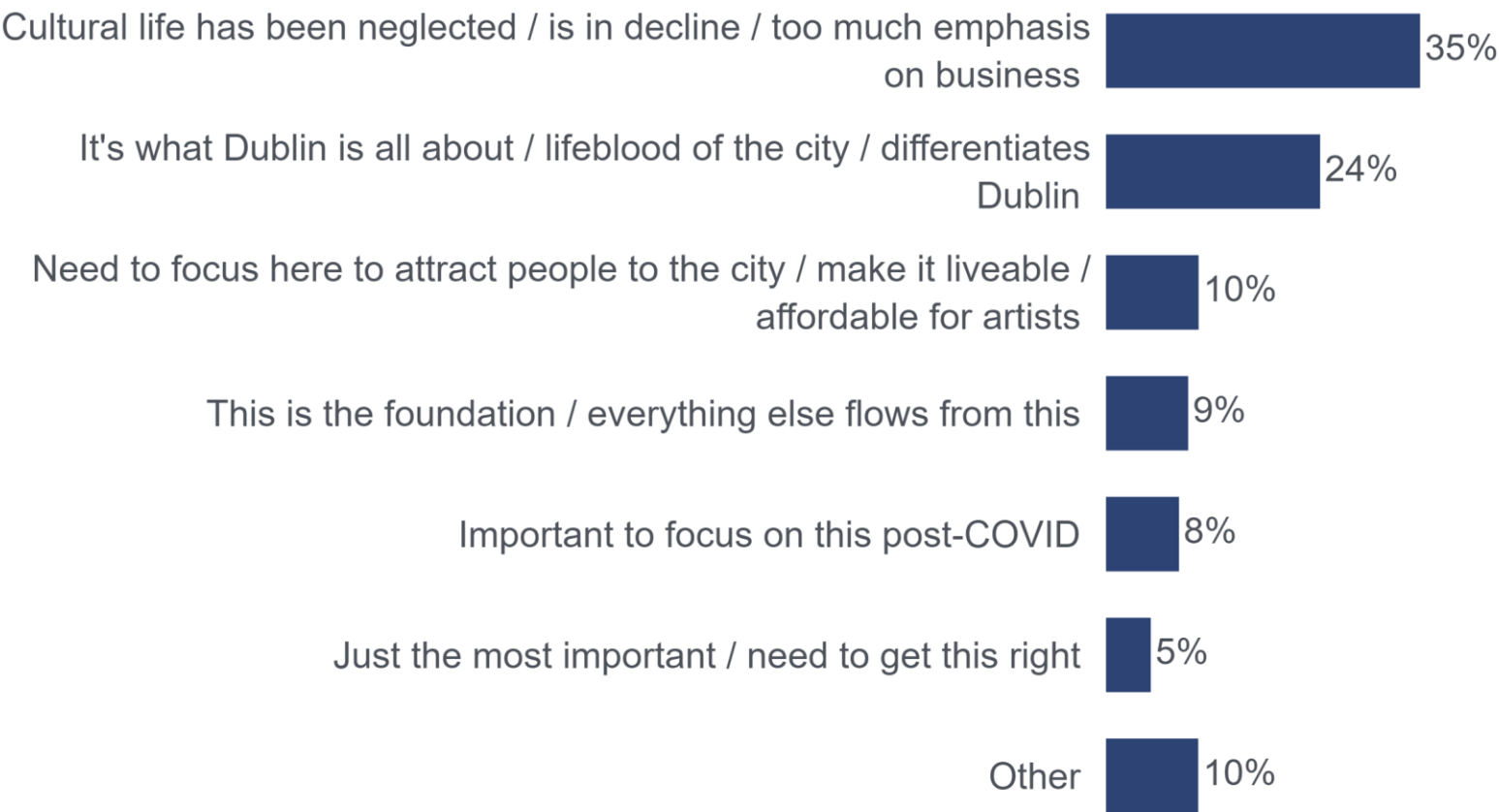
What are your reasons for choosing "Promote sustainable, green business practices" as the most important goal?

reasons classified

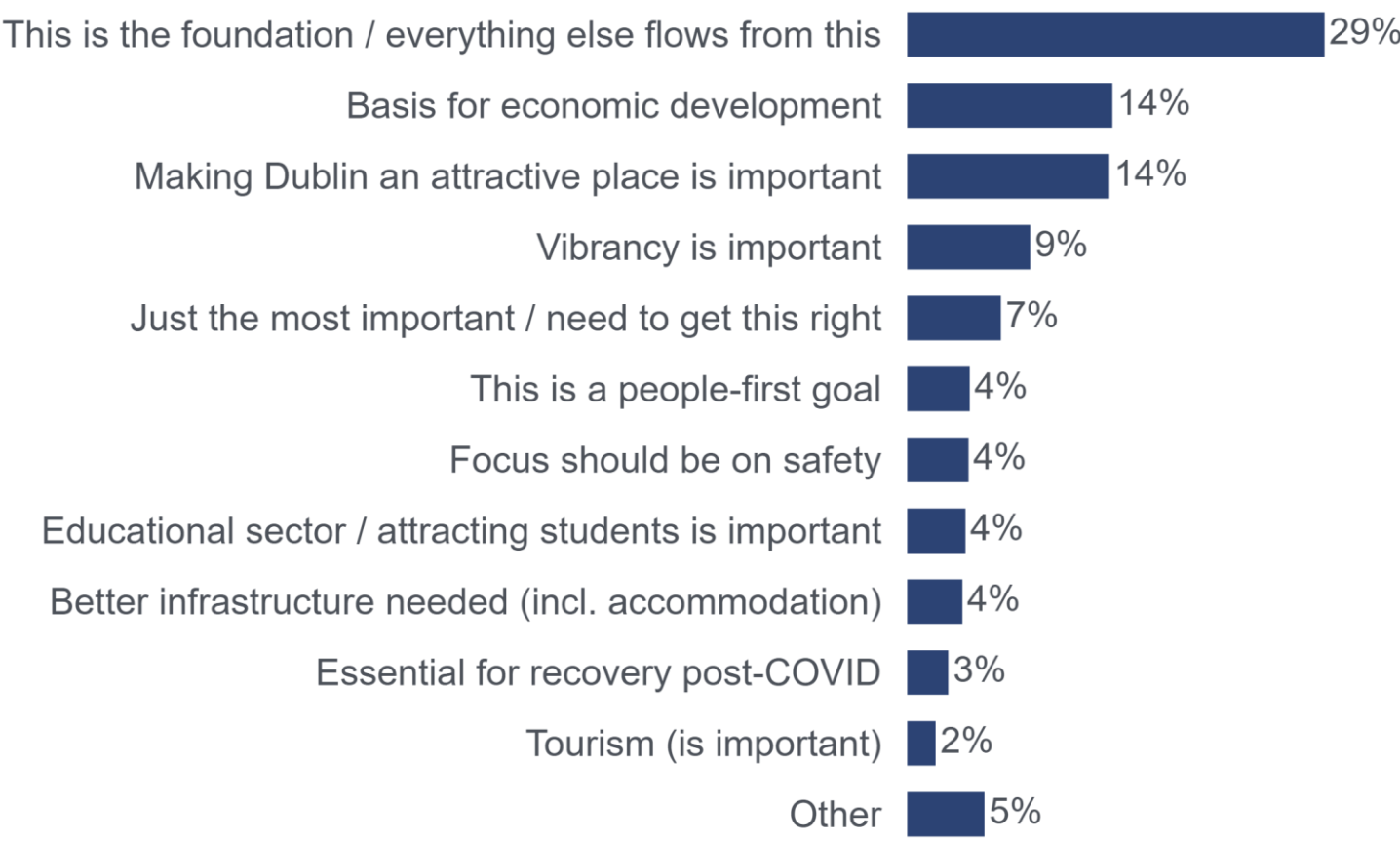


What are your reasons for choosing "Sustain vibrant cultural life" as the most important goal?

reasons classified



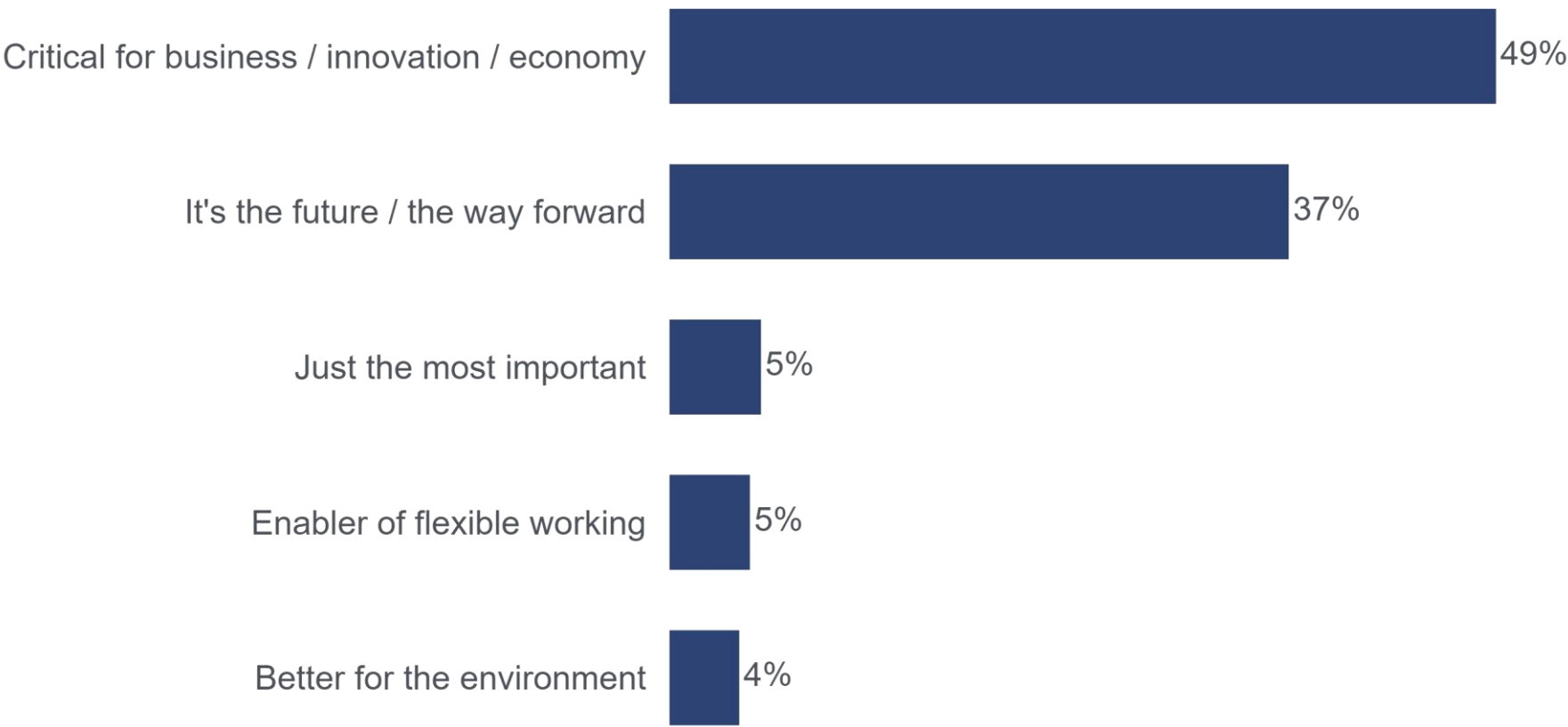
What are your reasons for choosing "Promote the city for working, studying, visiting & investing" as the most important goal?
reasons classified



Base: Promote the city for working, studying, visiting & investing 107

What are your reasons for choosing "Grow a strong, diverse digital economy" as the most important goal?

reasons classified



What are your reasons for choosing "Respond to innovative trends" as the most important goal?

Common theme – Need to remain relevant / move with the times

Base: Respond to innovative / emerging trends 19

What are your reasons for choosing "Expand international relations" as the most important goal?

Common theme – Need good international relations to survive / thrive

Base: International relations 8

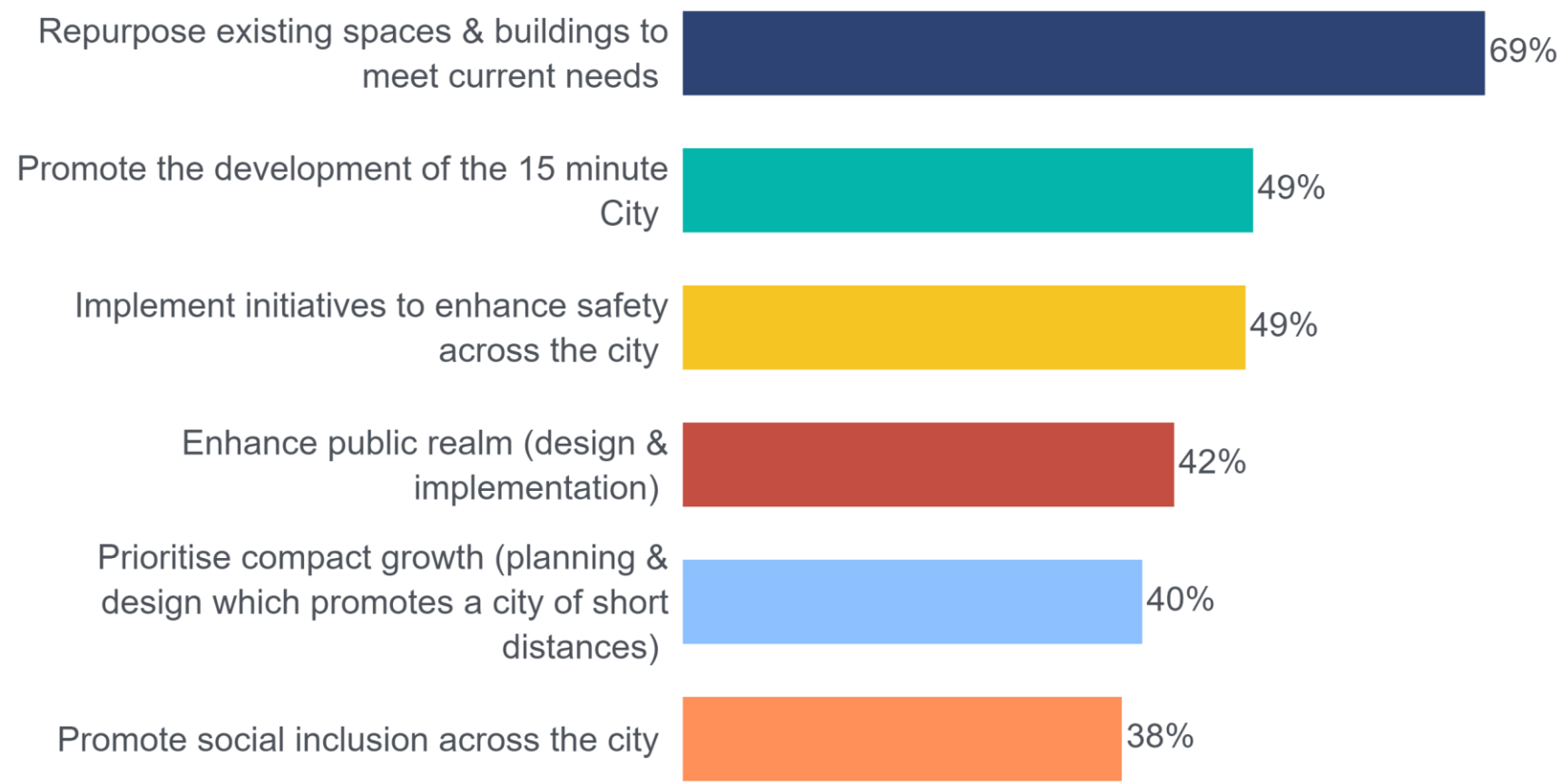
What, if anything, is missing from these goals that you feel is important for the economic development of Dublin City in the next 5 years?



Base: Anything missing from the goals 437

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What do you feel should be the priority areas of work for Dublin City Council under the goal of **“Promote urban development & Dublin as a living city”**
% selecting in top 3



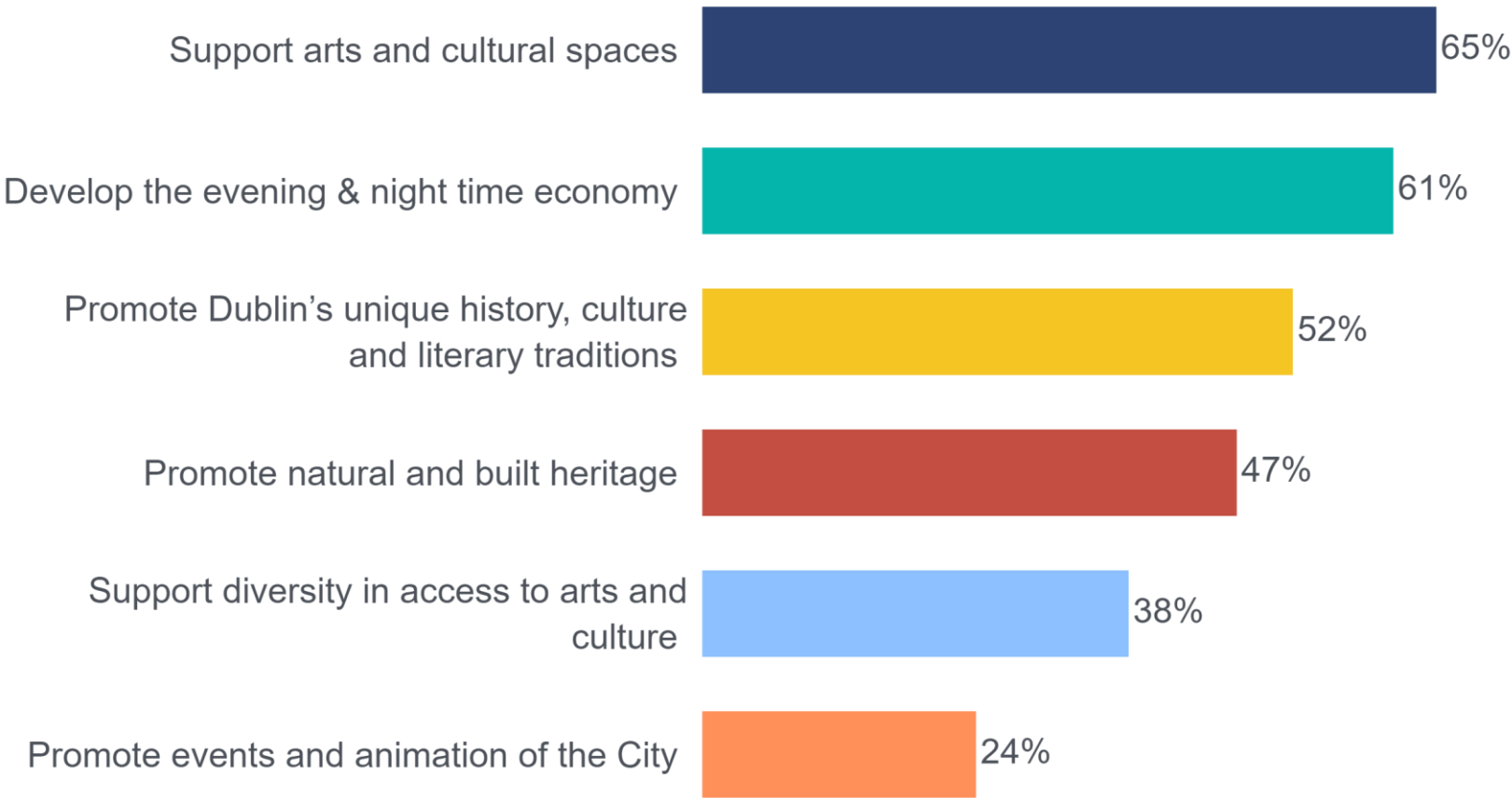
- Safety initiatives are a higher priority among females than among males. These are also a higher priority among over 65s.
- The development of the 15 minute city resonates more with those aged 18-34, as well as among those with higher monthly income.
- “Promote social inclusion” is ranked third among those in the lowest monthly income band.

What do you feel should be the priority areas of work for Dublin City Council under the goal of **“Promote sustainable, green business practices”**
% selecting in top 3



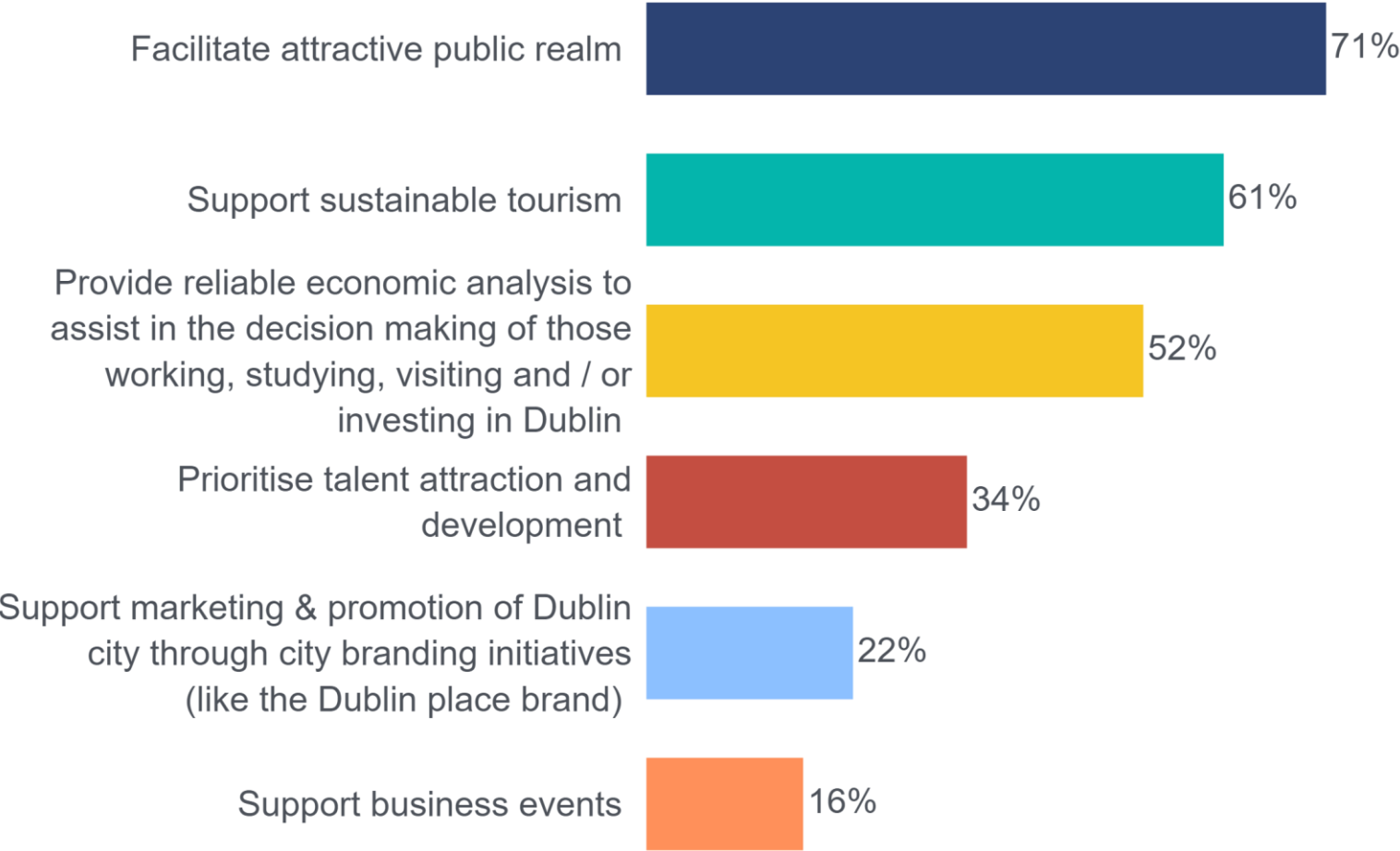
- “Provide grants for green business practices” was the highest priority among those with dependent children in the household.
- This was also a higher priority among younger respondents.

What do you feel should be the priority areas of work for Dublin City Council under the goal of **“Sustain vibrant cultural life”**
% selecting in top 3



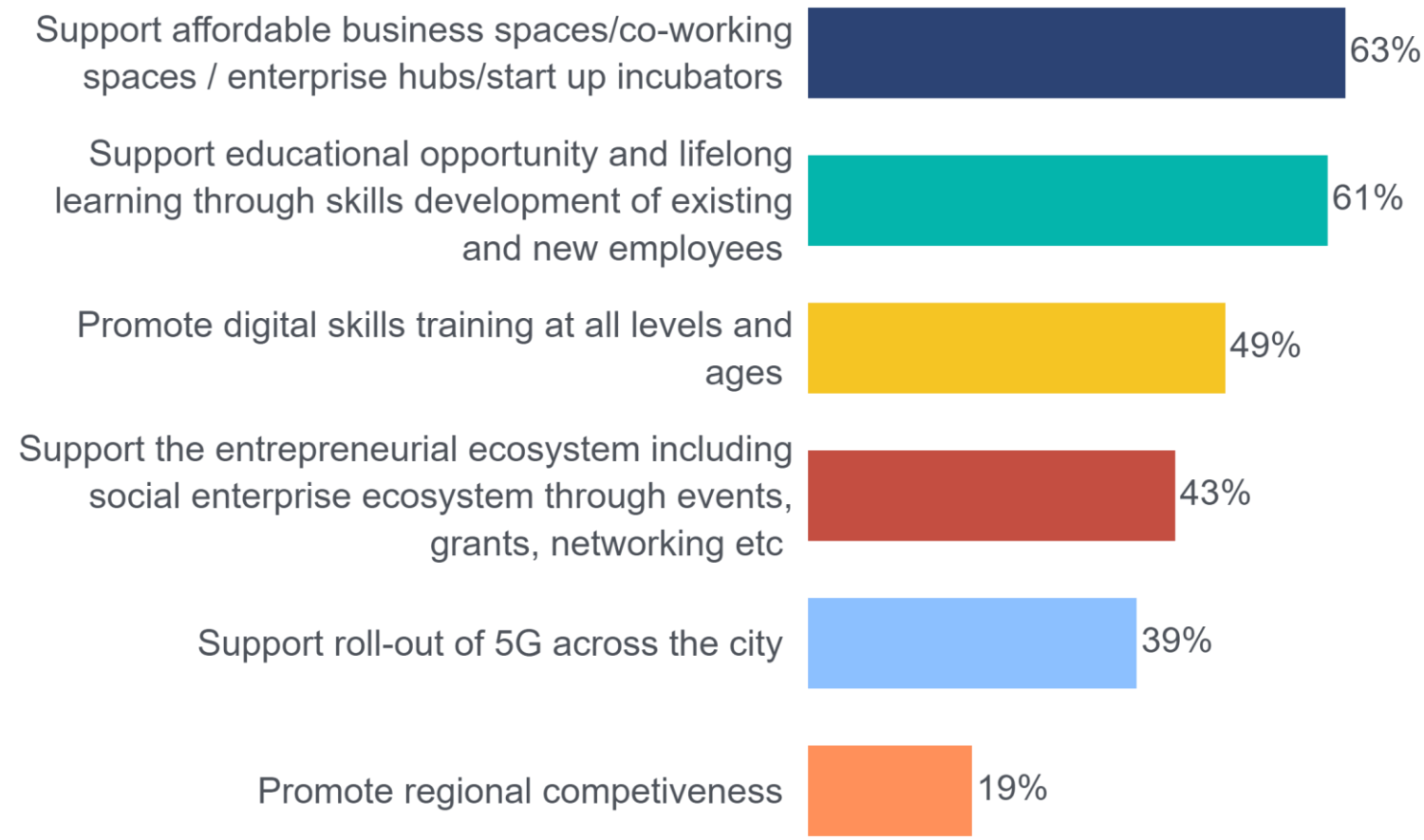
- “Develop the evening and night-time economy” was the highest priority among male respondents as well as among younger respondents.
- “Promote Dublin’s unique history, culture and literary traditions” ranked second among female respondents and was top ranked among over 65s.

What do you feel should be the priority areas of work for Dublin City Council under the goal of **“Promote the city for working, studying, visiting and investing”**
% selecting in top 3



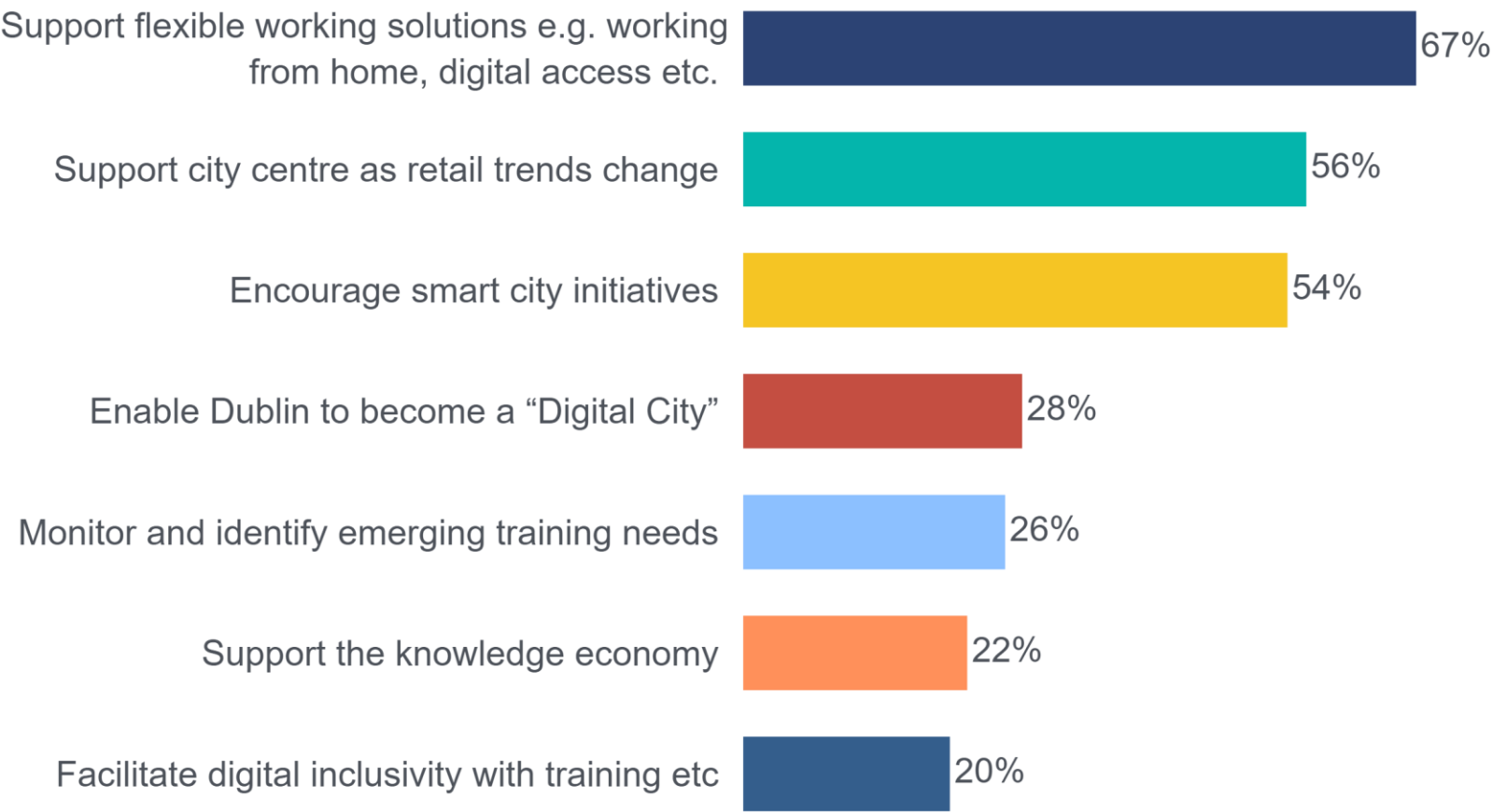
- “Facilitate attractive public realm” was a priority for 77% of DCC area residents.
- “Facilitate attractive public realm” becomes more important among higher income groups.

What do you feel should be the priority areas of work for Dublin City Council under the goal of “**Grow a strong, diverse, digital economy**”
% selecting in top 3



- Support for lifelong learning is a higher priority among females than among males, while 5G ranks higher among males.
- Support for digital skills training is a priority for 60% of over 65s.
- Supports for lifelong learning and for digital skills training are higher priorities among lower income groups.

What do you feel should be the priority areas of work for Dublin City Council under the goal of **“Responding to innovative / emerging trends”**
% selecting in top 3



- “Support city centre as retail trends change” is the top priority for over 65s.
- “Encourage smart city initiatives” ranks higher among younger age groups and among higher income groups.

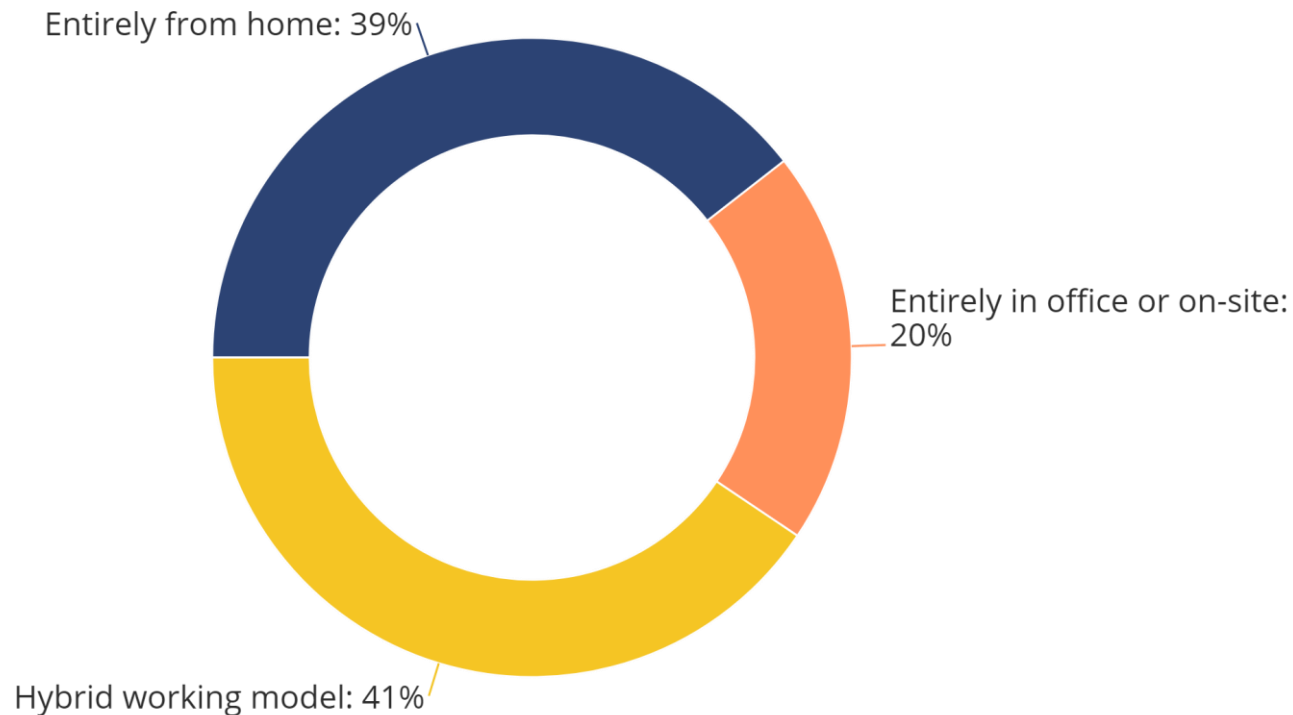
What do you feel should be the priority areas of work for Dublin City Council under the goal of “**Expand international relations**”
% selecting in top 3



- “Support business tourism and international events” is a higher priority for older respondents than for younger respondents.

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Which of the following best describes your current working arrangements?



39%

of respondents who were in employment were working entirely from home

Comparable figures from previous surveys:

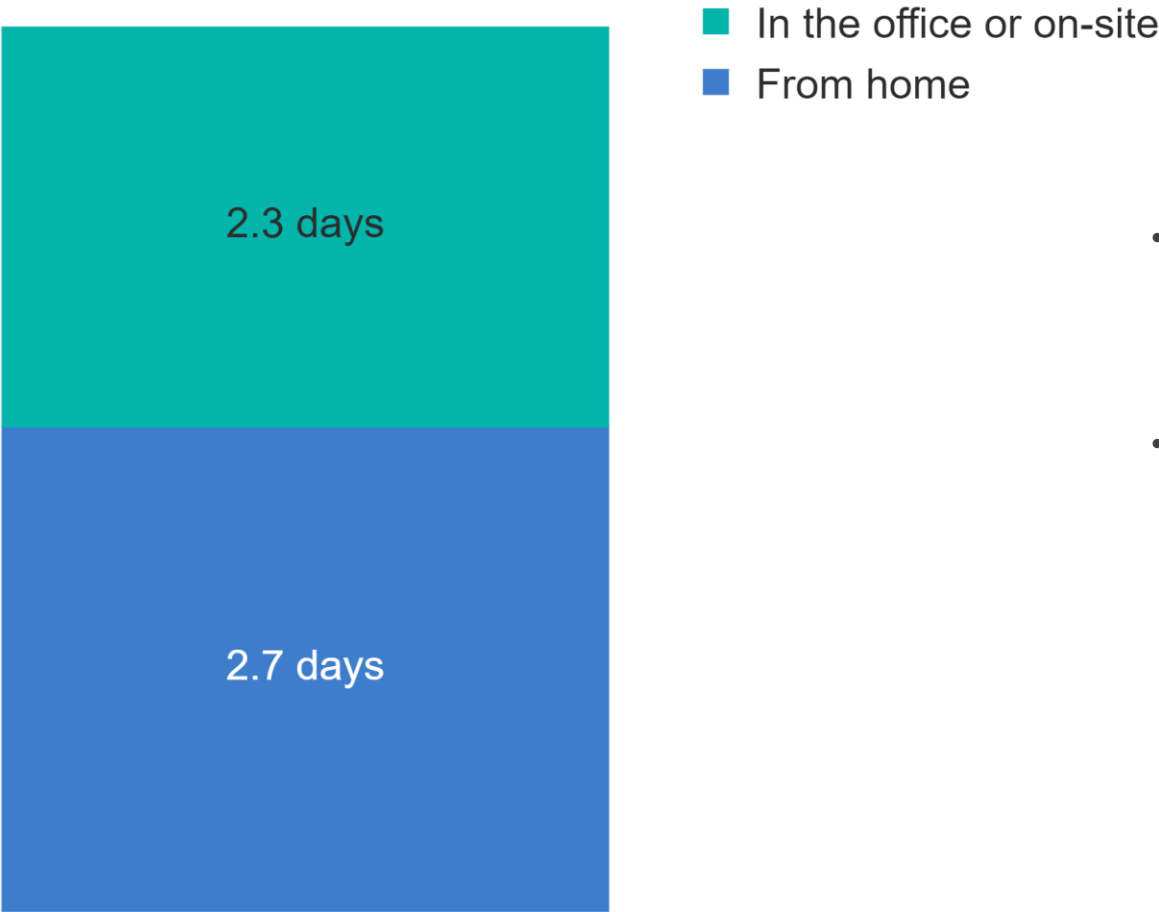
May 2020: **76%** - working entirely from home

August 2020: **56%** - working entirely from home

- 45% of those whose work is normally based within the DCC area were working to a hybrid model (29% for those working outside the DCC area).
- Those on higher incomes were more likely to be working from home or to a hybrid model.

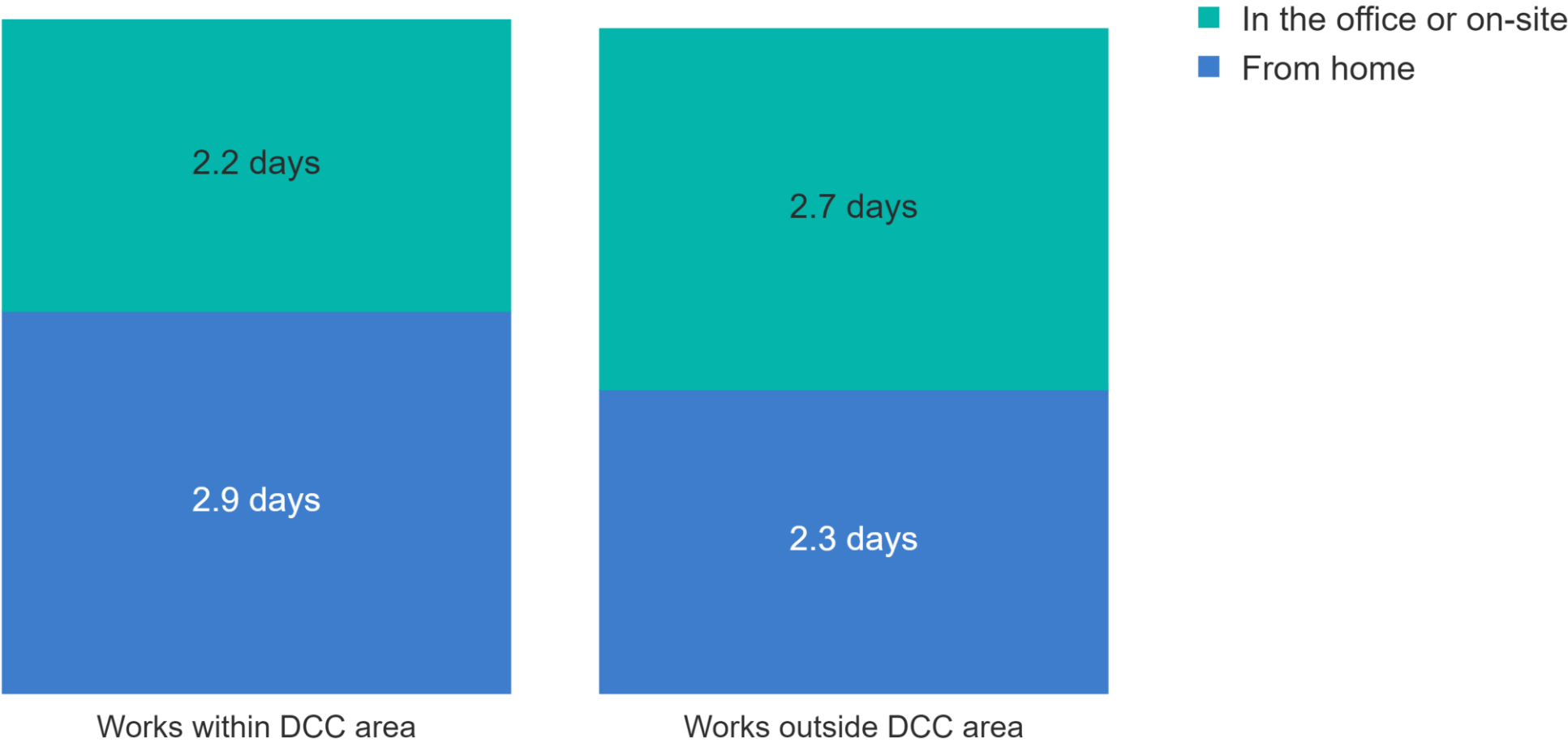
Base: 662

On average, in a typical week this month, how many **days per week** are you working:



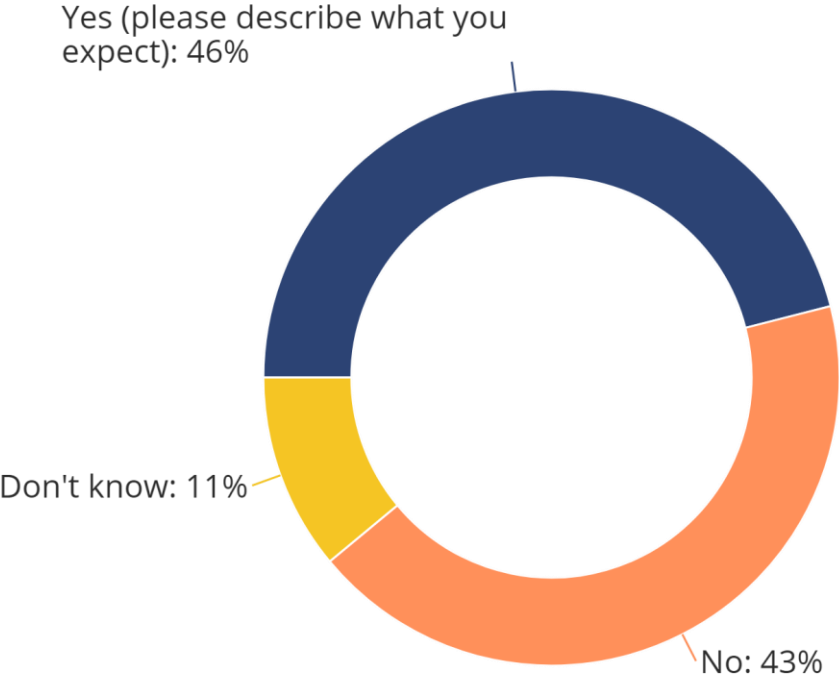
- Hybrid workers whose work is normally based within the DCC area are spending an average of 2.9 days per week working from home
- Hybrid workers outside the DCC area are spending an average of 2.3 days per week working from home.

On average, in a typical week this month, how many **days per week** are you working:
- by area where work is normally located



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Do you envisage your working arrangements changing in the near future? i.e. within the next 6 months

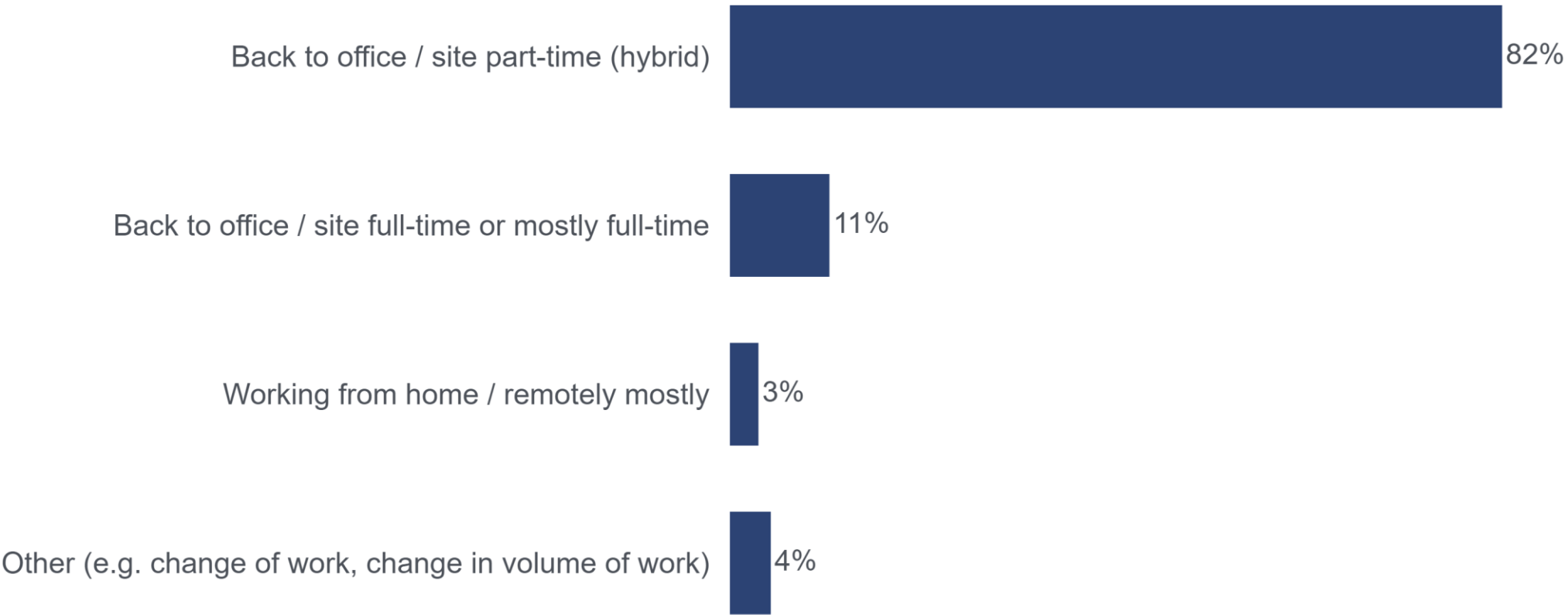


46%

of working respondents envisage their working arrangements changing in the near future.

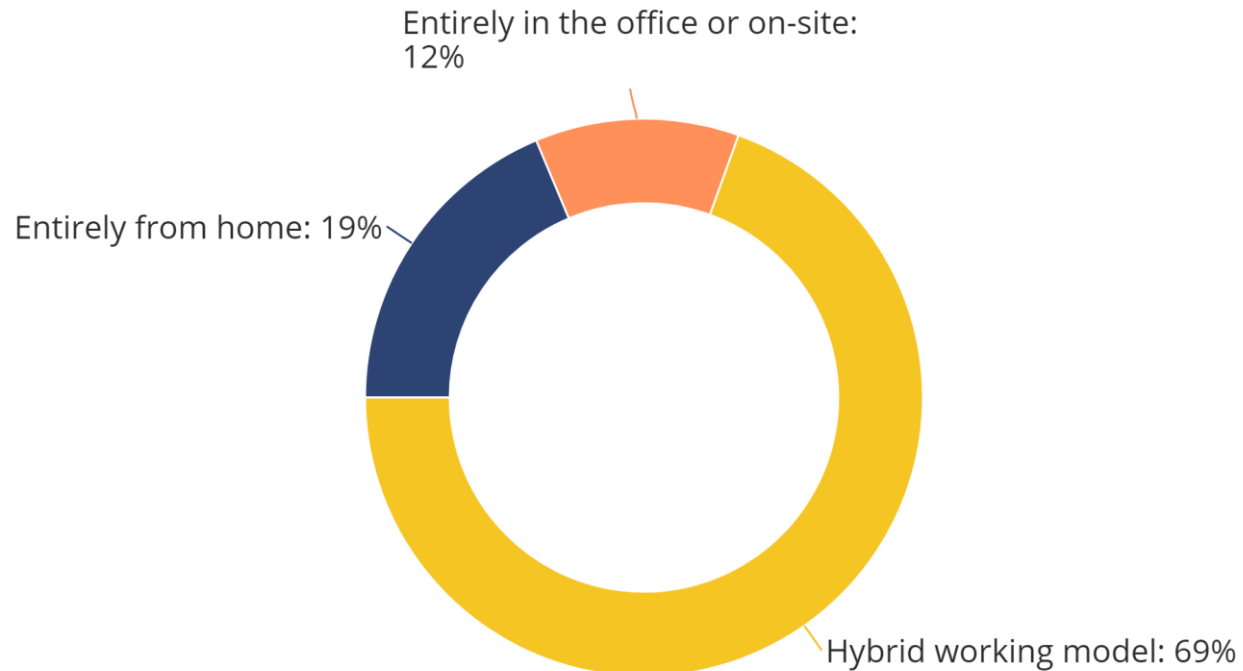
This is higher among those whose work is normally based in the DCC area workers at 50% and lower among those who work outside the DCC area at 34%.

Anticipated change in working arrangements specified
changes classified



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In the medium to long term, what would be your preferred working arrangements?

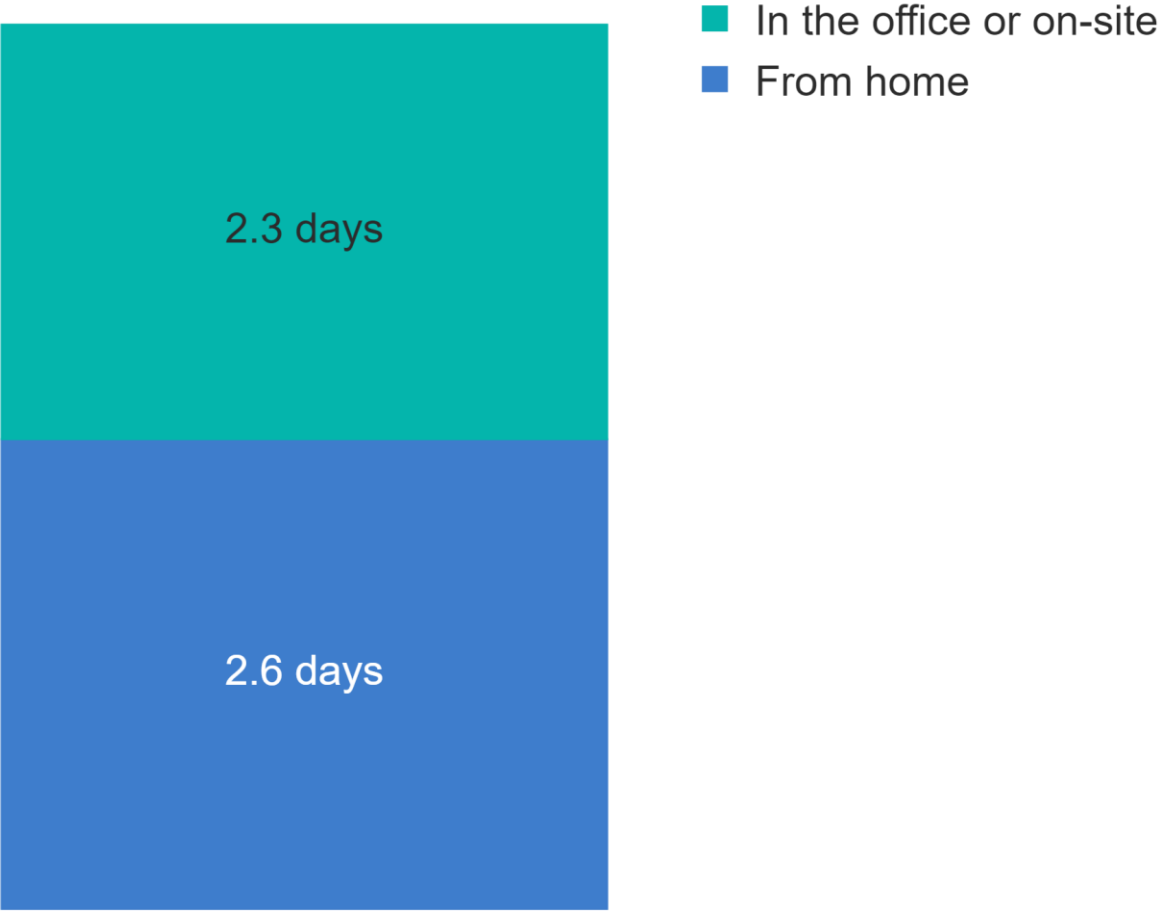


69%

of respondents who were in employment indicated a preference for hybrid working in the medium to long term.

This was higher among those whose work is normally based in the DCC area (73% prefer hybrid) than among those who work outside the DCC area (59% prefer hybrid)

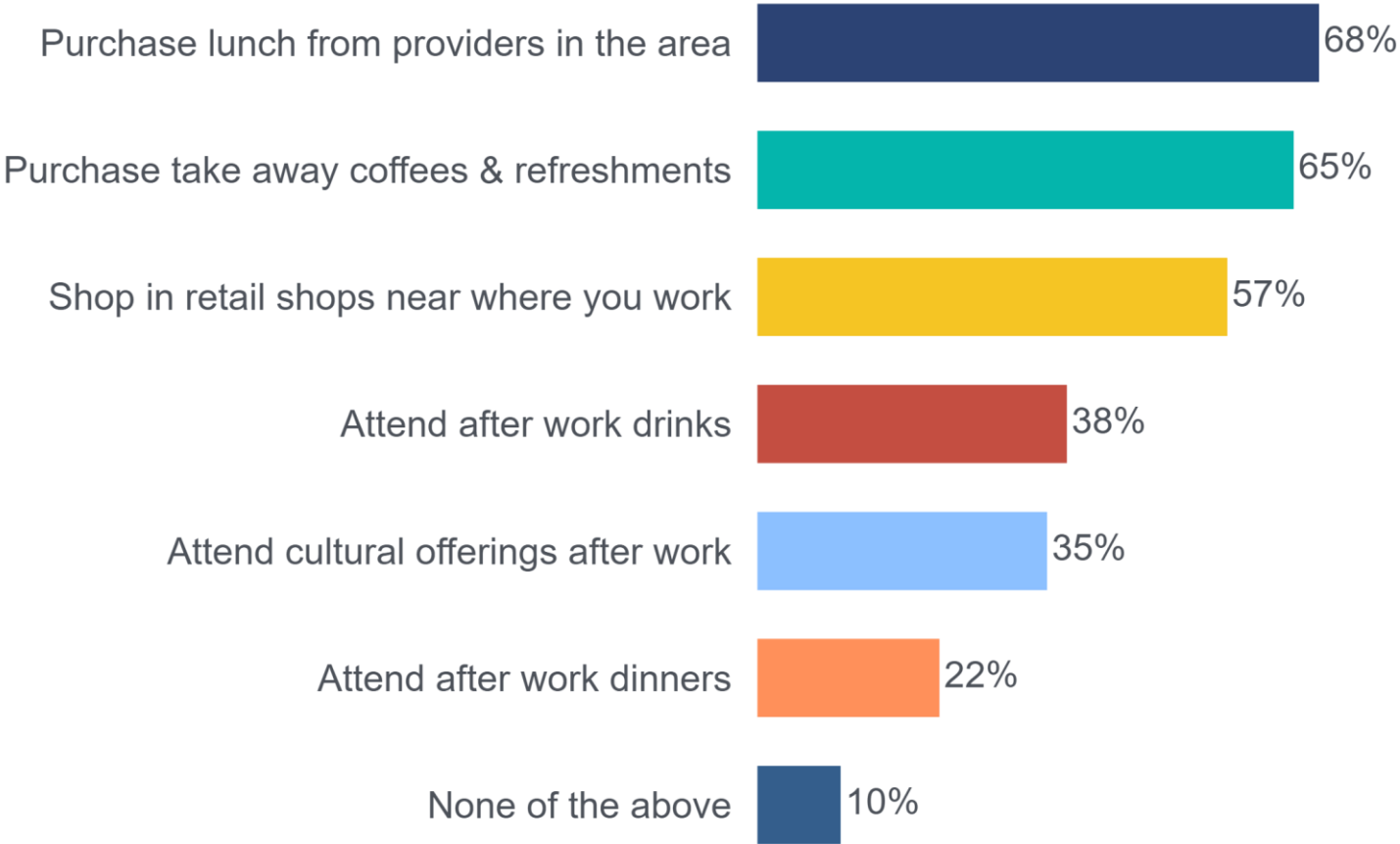
In the medium to long term, if the flexibility was available to you, how many **days per week** would you like to work:



Those on higher incomes indicated a preference for a higher average number of days working from home.

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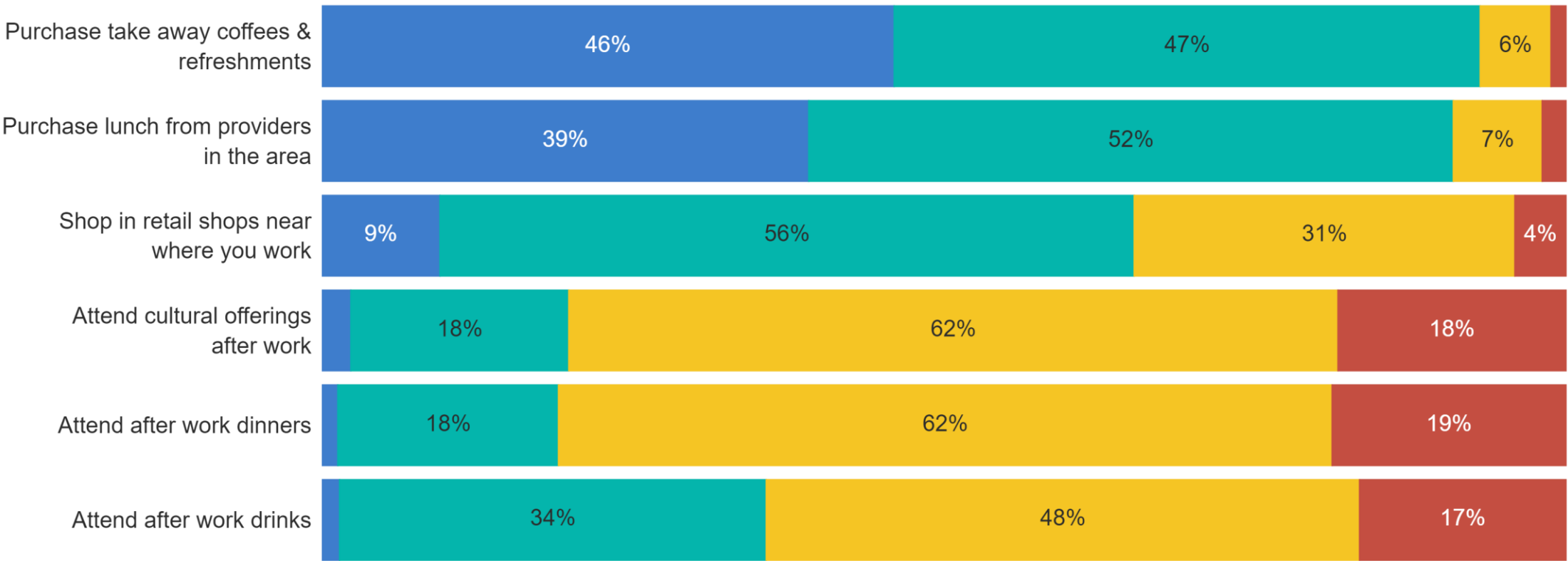
On days when you are at work in the office or on-site, do you do any of the following?
% selecting



- Instances of local spend on lunch, take away coffees etc., after work drinks and dinners is highest among 18-34 year olds.
- Instances of spend on all categories is higher among those working with the DCC area than among those working outside the DCC area.
- Those with no dependent children are more likely to engage in after work drinks and after work dinners.

When at work in the office or on-site, how often do you...

■ 3 to 5 times a week ■ Once or twice a week ■ Once or twice a month ■ Less often

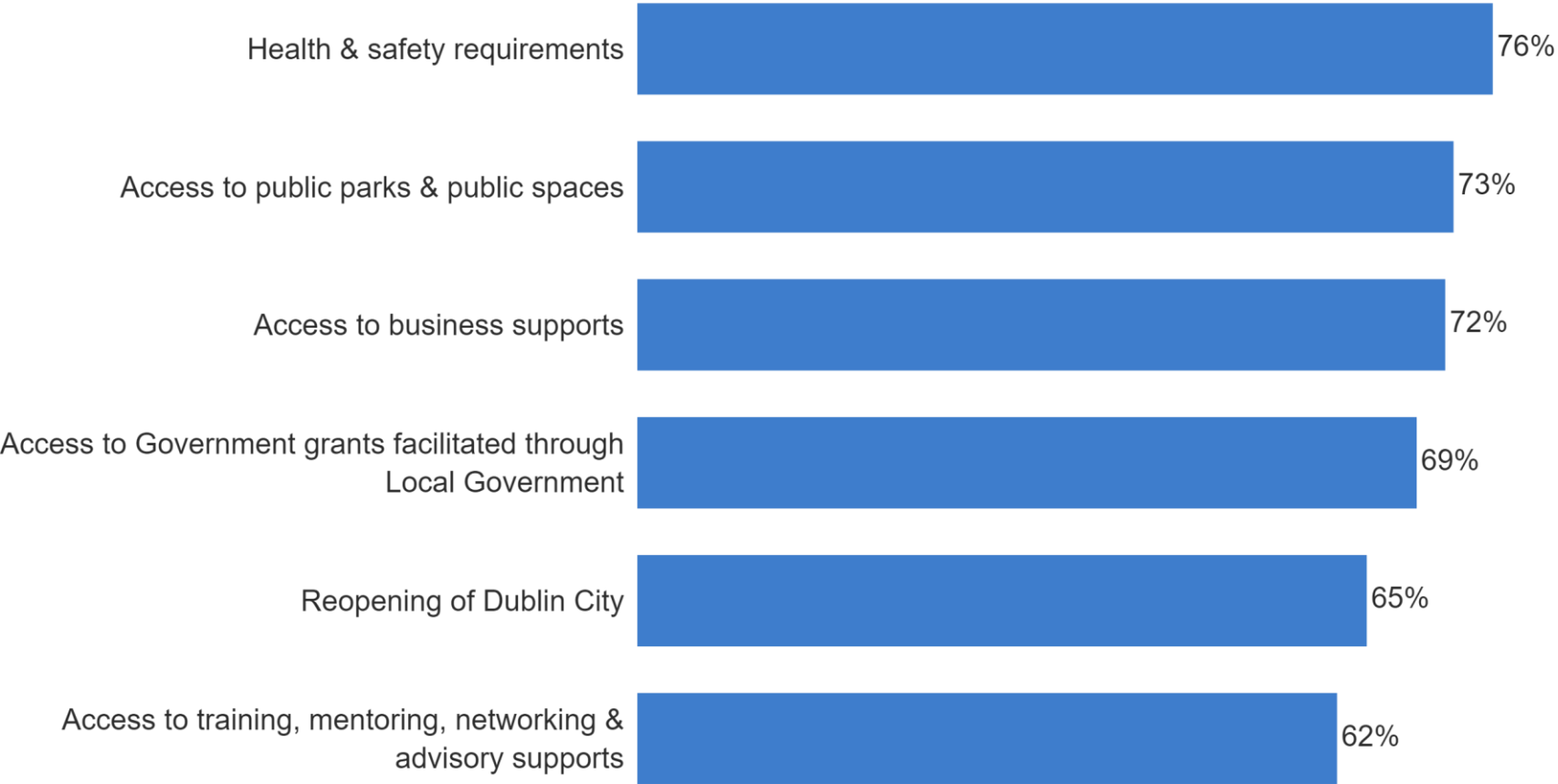


Frequency is similar among those working within the DCC area and outside the DCC area

Base: 395

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How well do you feel local government has managed the following during the COVID-19 crisis?
% managed well or just okay



- Ratings tended to be higher among higher income earners.
- Ratings were consistent across all local authority areas.

For further information please
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