

# Citizen Survey - Retail and Hospitality



Comhairle Cathrach  
Bhaile Átha Cliath  
Dublin City Council



Economic Development Office  
Dublin City Council

Report Date: 04 June 2024  
Survey Fieldwork: May 2024

Report by:



**Delve Research**  
Survey Research & Analysis

[www.delve-research.com](http://www.delve-research.com)

**EXECUTIVE REPORT**

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## Life Satisfaction

- **6.8 out of 10** is the average life satisfaction score among respondents. This is up from the level of 6.6 measured in March 2024.

## Feeling Safe in the City Centre

- **67%** of respondents felt safe in the city centre during the day (down from 69% in March 2024). **34%** felt safe in the city centre at night - down from 37% in March 2024.

## Working arrangements

- **60%** of respondents had a **hybrid** working model, 11% worked entirely from home and 29% worked entirely on-site / in the office.
- Among hybrid workers the average week was split equally between days worked at home and days worked on-site / in the office.
- Among all workers, 3 out of 4 can be found in the office or on-site on a Tuesday, Wednesday or Thursday. This falls to 1 in 2 on Fridays.

## Local Spend While On-Site / in the Office

- Engaging in any economic activity (purchasing lunch, coffee, shopping, after-work events) has remained similar to 2021, with the exception of attending cultural events. In 2021 35% of respondents indicated that they attended cultural events after work; this has fallen to 25% in 2024.
- While “any” engagement has remained reasonable stable, the frequency of engagement has fallen for all activities. This is particularly so for attending after-work drinks and after-work dinners.

## Engaging in Shopping and Socialising in Dublin

- **92%** of respondents indicated that they engage in **shopping in a physical shop in Dublin City or the Dublin region**. This is down from 96% in 2018. Engaging in dining / eating out and going to the pub remain at similar levels to 2018 with 90% and 71% engaging in these activities at least occasionally.
- The frequency of **dining / eating out has fallen from 59% at least once a month to 54% at least once a month since 2018**. Shopping for clothes / fashion at least once a month has fallen from 35% in 2018 to 28% in 2024. Shopping for books in a physical store has fallen from 26% to 21% at least once a month. Shopping for personal electronics in a physical store has fallen from 7% in 2018 to 3% at least once a month in 2024.
- **Going to the pub at least once a month** and **shopping for household durable goods at least once a month** remain **largely unchanged** since 2018, at 47% and 10% respectively.

## Perceptions and Sentiment around Shopping and Socialising in Dublin

- Since 2018 there has been a notable **decline in perception and sentiment** around shopping and socialising in Dublin on a number of measures.
  - “I like to go out and socialise in Dublin” – agreement is down from 81% in 2018 to 65% in 2024
  - “I enjoy shopping in Dublin” – down from 74% to 53%
  - “Dublin has a vibrant city centre” – down from 89% to 53%
  - “Shopping in Dublin city centre is a pleasant experience” – down from 71% to 38%
  - “Dublin has a good range of high quality restaurants” – down from 93% to 84%
  - “Dublin has a wide selection of unique shops and independent retailers” – down from 70% to 49%
- Measures for wayfinding (“Dublin city centre is easy to get around” and “A stranger could easily identify the shopping areas in Dublin city centre” have remained reasonably stable since 2018.

## Division of Spend – City Centre, Suburbs, Online

- Looking at proportion of spend by location, **a fall is noted across all categories for city centre spend** in the period 2018 to 2024.
- Going to the pub and eating out **in the suburbs** have both seen a slight increase in proportion of spend during that period.
- Proportion of spend on clothes and household durables in suburban locations has fallen since 2018.
- Proportion of spend on personal electronics and books in suburban locations has remained stable since 2018.
- **The proportion of spend going to online channels** on clothes, household durables and personal electronics **has increased significantly since 2018**, while the proportion of online spend on books remains relatively stable.

## Appeal of Areas of Dublin

- **“Grafton Street and environs”** remains the area of widest appeal in relation to shopping and socialising, This is followed by the area of Dame / Camden / Wexford / South Great George’s Street.
- Capel Street ranks third, with Rathmines / Ranelagh in fourth.
- “Henry Street and environs” has dropped from third place in this ranking in 2022 to fifth place in 2024.

## Factors Influencing Where You Shop

- The top five factors influencing where people shop in Dublin in physical stores were:
  - Good choice of shops / range of stores (71% selecting as important, down from 77% in 2018)
  - Pedestrianised streets / attractive environment (58%, up from 48%)
  - Good prices / good value for money (54%, down from 66%)
  - Good / cheap public transport (47%, up from 35%)
  - Close to home / convenient (44%, no significant change)

## Factors Influencing Where You Dine / Eat Out

- The top five factors influencing where people dine / eat out in Dublin were:
  - Good choice of restaurants / eateries (82% selecting as important)
  - Good prices / good value for money (72%)
  - Pedestrianised streets / attractive environment (51%)
  - Good / cheap public transport (46%)
  - Close to home / convenient (45%)

## Overall Rating of Shopping and Leisure in Dublin

- **80%** of respondents rated **“Going to the pub”** in Dublin as good or excellent, down from 91% in 2018
- **92%** of respondents rated **“Dining / Eating out”** in Dublin as good or excellent, down from 92% in 2018
- **57%** of respondents rated **“Shopping (other than for groceries)”** in Dublin as good or excellent, down from 78% in 2018

## Spend

- The average reported spend when **eating out** in Dublin was **€72.27** for an evening meal, including any drinks.
- The average reported spend on a **typical visit to the pub** in Dublin was **€43.22**.
- Respondents indicated net increases in spend on Shopping (+14%), Going to the Pub (+6%) and Eating Out (+22%) when compared with this time last year.
- Respondents expected decreases in spend in the next 12 months on Shopping (-2%), Going to the Pub (-11%) and no change in spend on Eating Out.

## Value for Money in Dublin

- **14%** rated **Shopping** in Dublin as **good or great value for money** – down from 34% in 2018.
- **6%** rated **Going to the Pub** in Dublin as **good or great value for money** – down from 12% in 2018.
- **17%** rated **Dining / Eating Out in Dublin** as **good or great value for money** – down from 30% in 2018.

## Ease of Getting in and Around Dublin City Centre

- “I find it easy to get into Dublin City Centre” – 74% agreed or strongly agreed, up from 73% in 2018.
- “I find it easy to get around Dublin City Centre” – 66% agreed or strongly agreed, down from 67% in 2018.
- “Dublin City Council does a good job of maintaining a pleasant city centre” – 22% agreed or strongly agreed, down from 49% in 2018.

## Making Dublin City Centre More Attractive for Shopping and Socialising

- The top three suggestions for making Dublin City Centre more attractive for shopping and socialising were:
  - Improve sense of **safety** / increase Garda presence
  - **Cleaner** city centre / revamp areas
  - **Pedestrianisation** / more pedestrian-friendly / less traffic
- These were also the top three suggestions in 2022.

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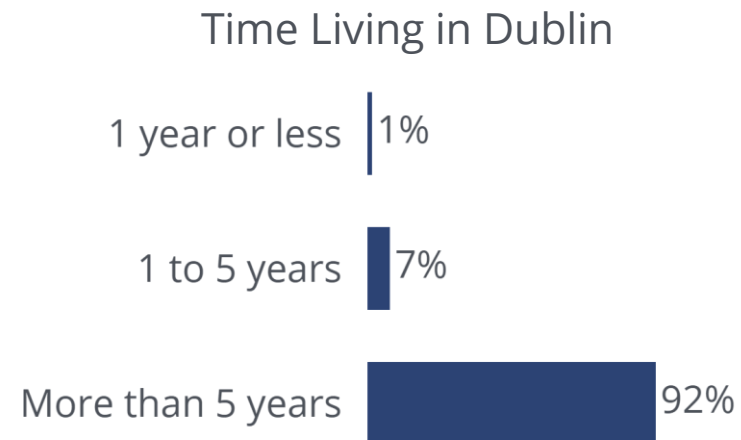
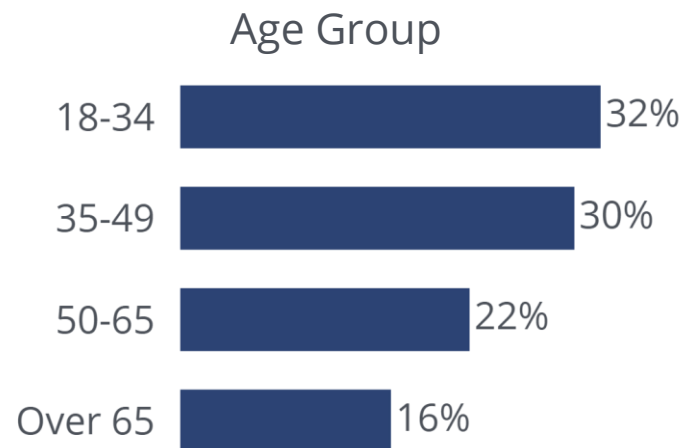
- Online survey, 7th May - 19th May 2024
- 1,058 respondents from the "Your Dublin, Your Voice" opinion panel
- 20% response rate
- Global margin of error +/- 3.0%
- Robust panel in existence since 2010, recruitment through various channels



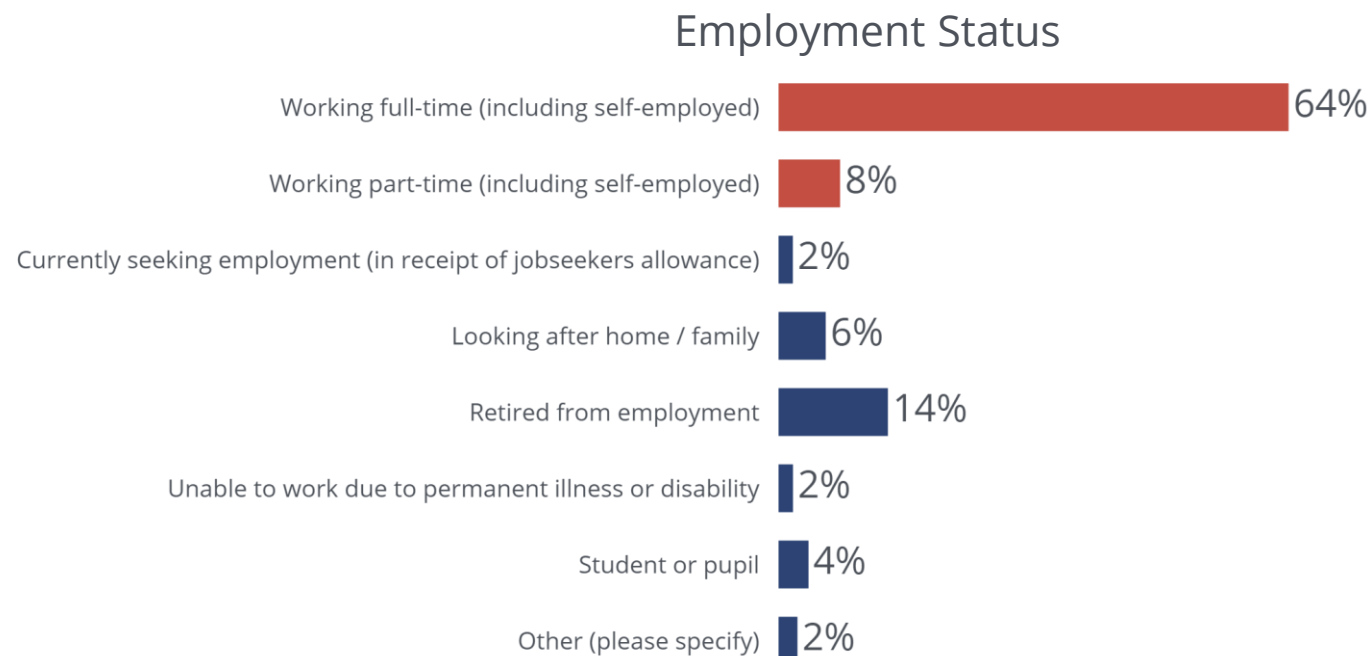
49%



51%



32% with dependent children in household



A horizontal bar chart with a white background. The y-axis lists four local authorities: 'Dublin City Council', 'SDCC', 'Fingal CC', and 'DLR CC'. The x-axis represents percentages, with labels '0%', '50%', and '100%' at the bottom. Each authority has a corresponding dark blue bar. The lengths of the bars correspond to the percentages: 64% for Dublin City Council, 13% for SDCC, 11% for Fingal CC, and 9% for DLR CC. The exact percentage values are also printed in black text at the end of each bar.

Local Authority	Percentage
Dublin City Council	64%
SDCC	13%
Fingal CC	11%
DLR CC	9%

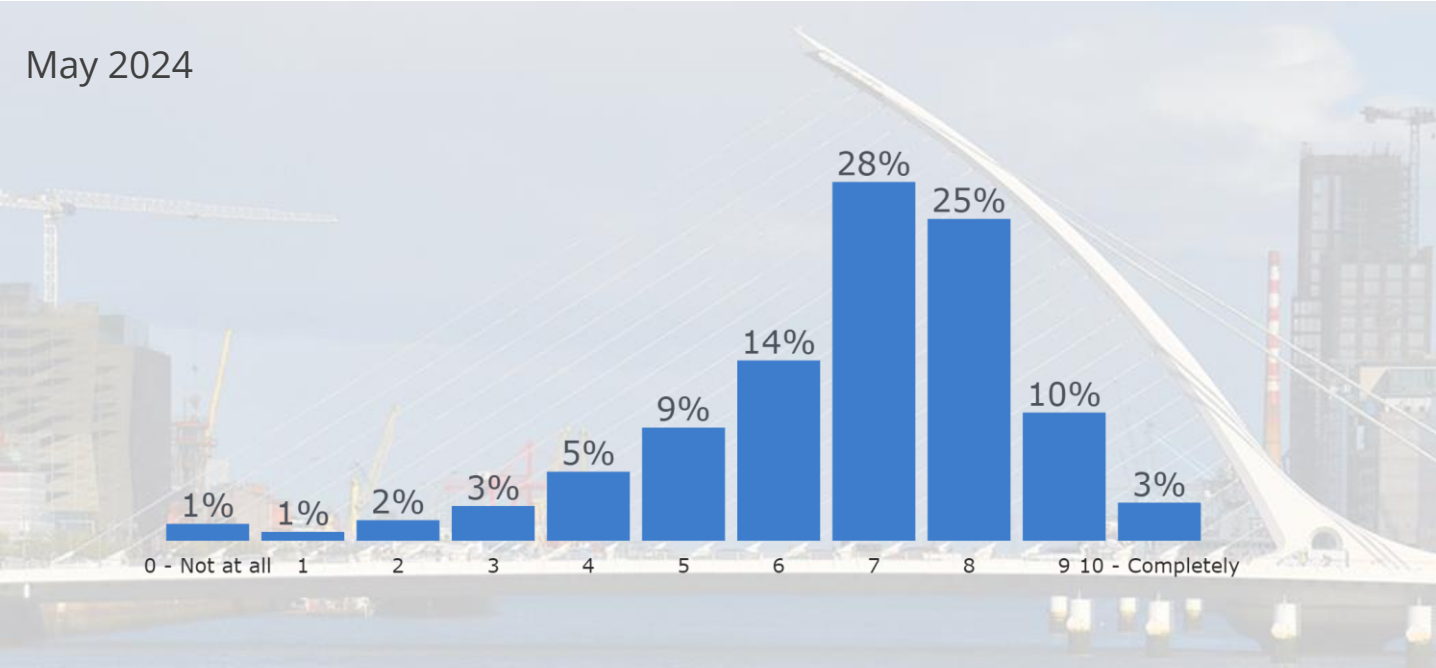
### Current Area of Residence

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

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On a scale of 0 to 10, overall how satisfied are you with your life nowadays?



**6.8**  
is the average life  
satisfaction score out of 10

This is up from the level  
measured in March 2024



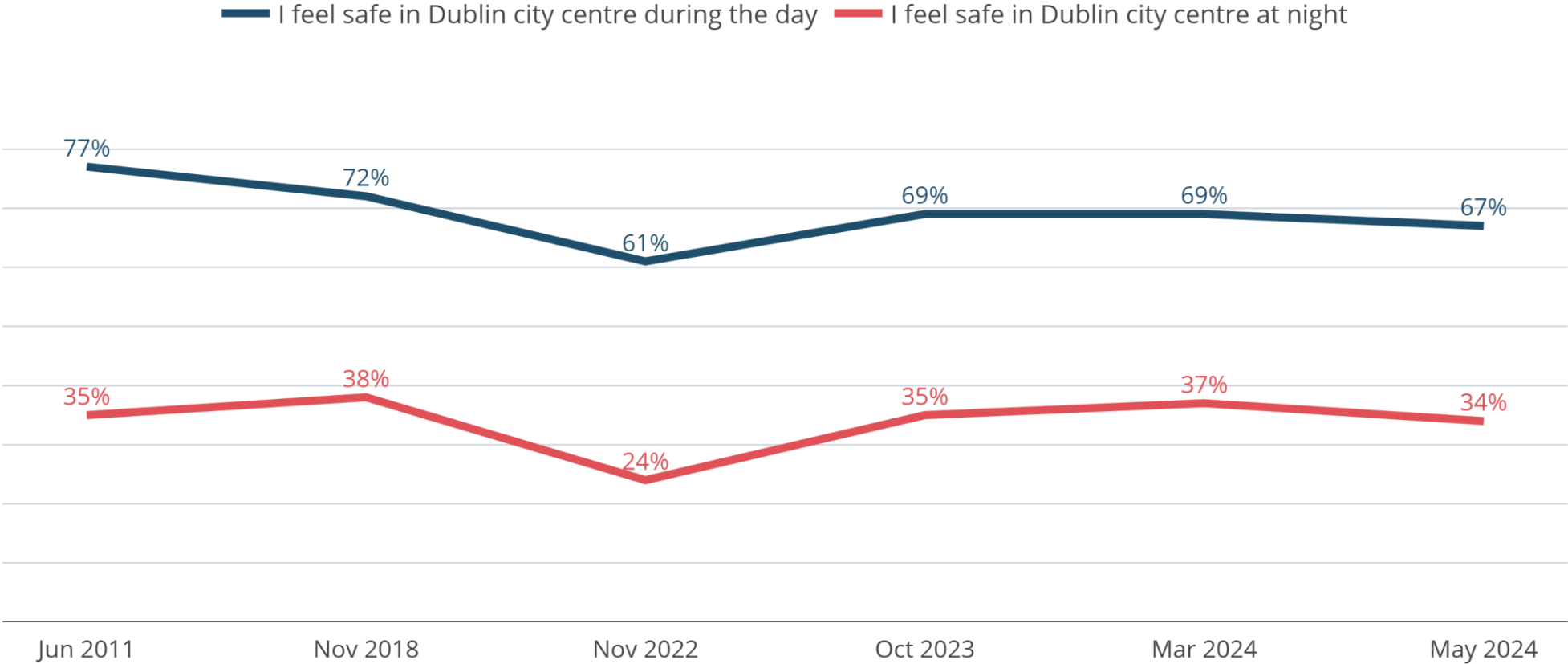
Feb 2020 Feb 2022 Aug 2022 Nov 2022 Mar 2023 May 2023 Aug 2023 Oct 2023 Mar 2024 May 2024

Base: 1058

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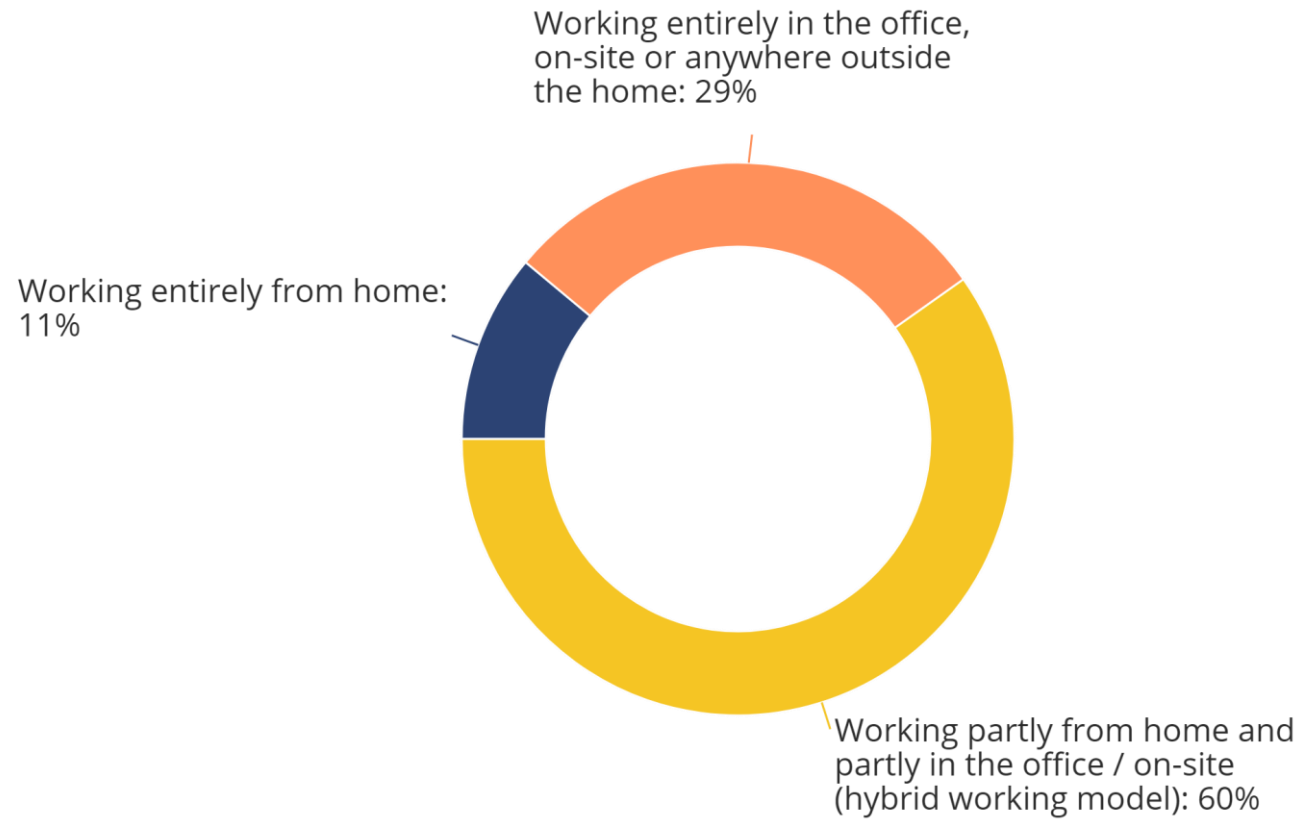
Thinking about shopping (excluding groceries) and leisure in general please indicate your level of agreement with each of the following statements:  
% agree or strongly agree



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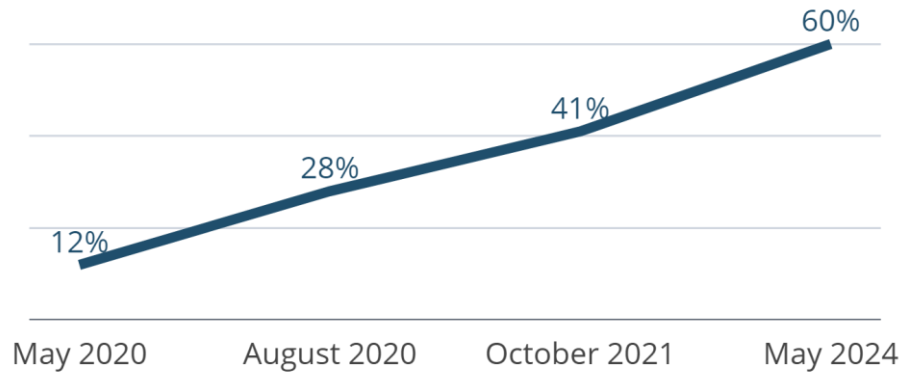
Which of the following best describes your current working arrangements?



Base: all workers



Trend of hybrid working



**60%** of workers have a hybrid working model.

This rises to **65%** for those whose work is based in the **Dublin City Council area**

This rises to **65%** for those aged **35-49**

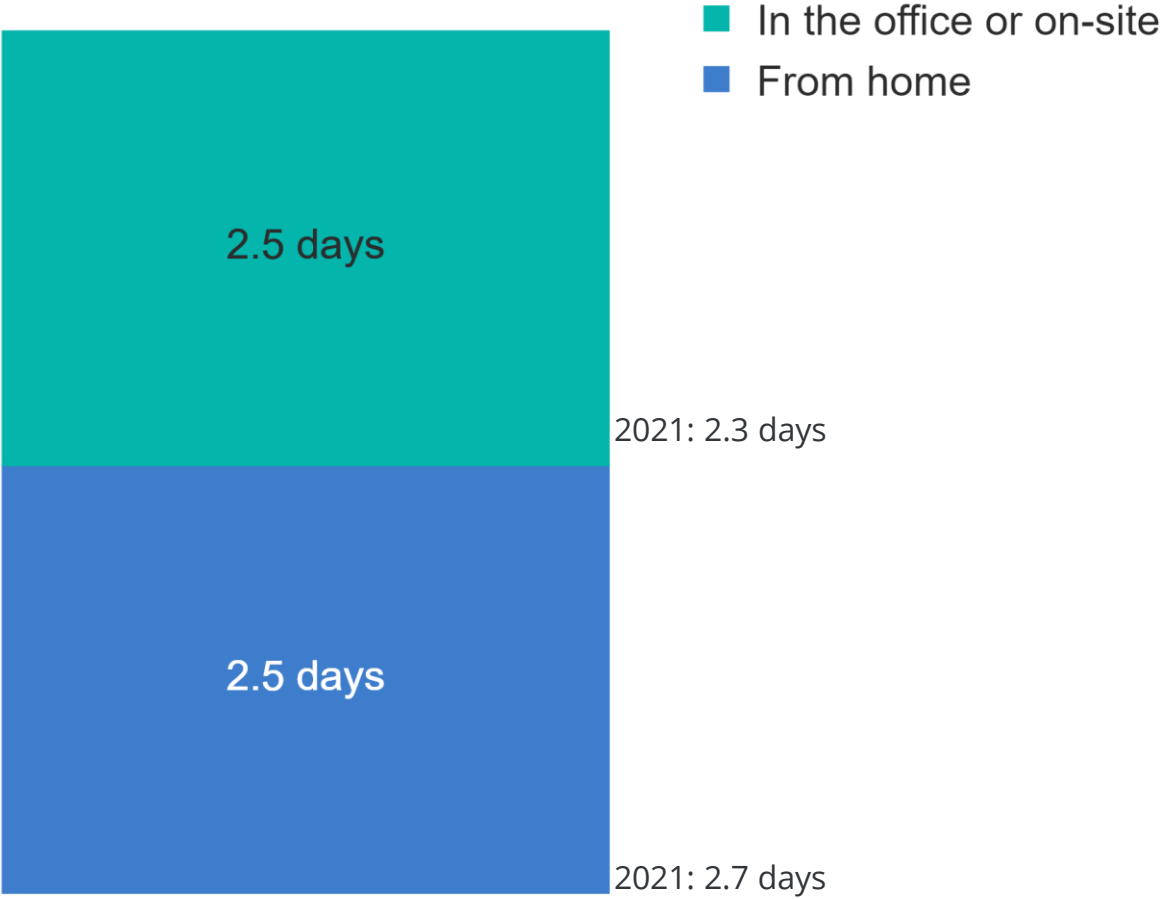
This rises to **67%** for those **with dependent children** in the household

This increases with education, rising to **67%** among those with a postgraduate qualification

This rises to **69%** among those in the highest disposable income bracket



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



- Hybrid workers aged 50 to 65 worked on average 2.2 days from home, significantly lower than the average of younger age groups.
- Days worked from home increase with income level until the highest income bracket, where 2.5 days from home is the average.
- Number of days worked from home does not vary by presence of children, although those with children are more likely to have a hybrid model in the first place.

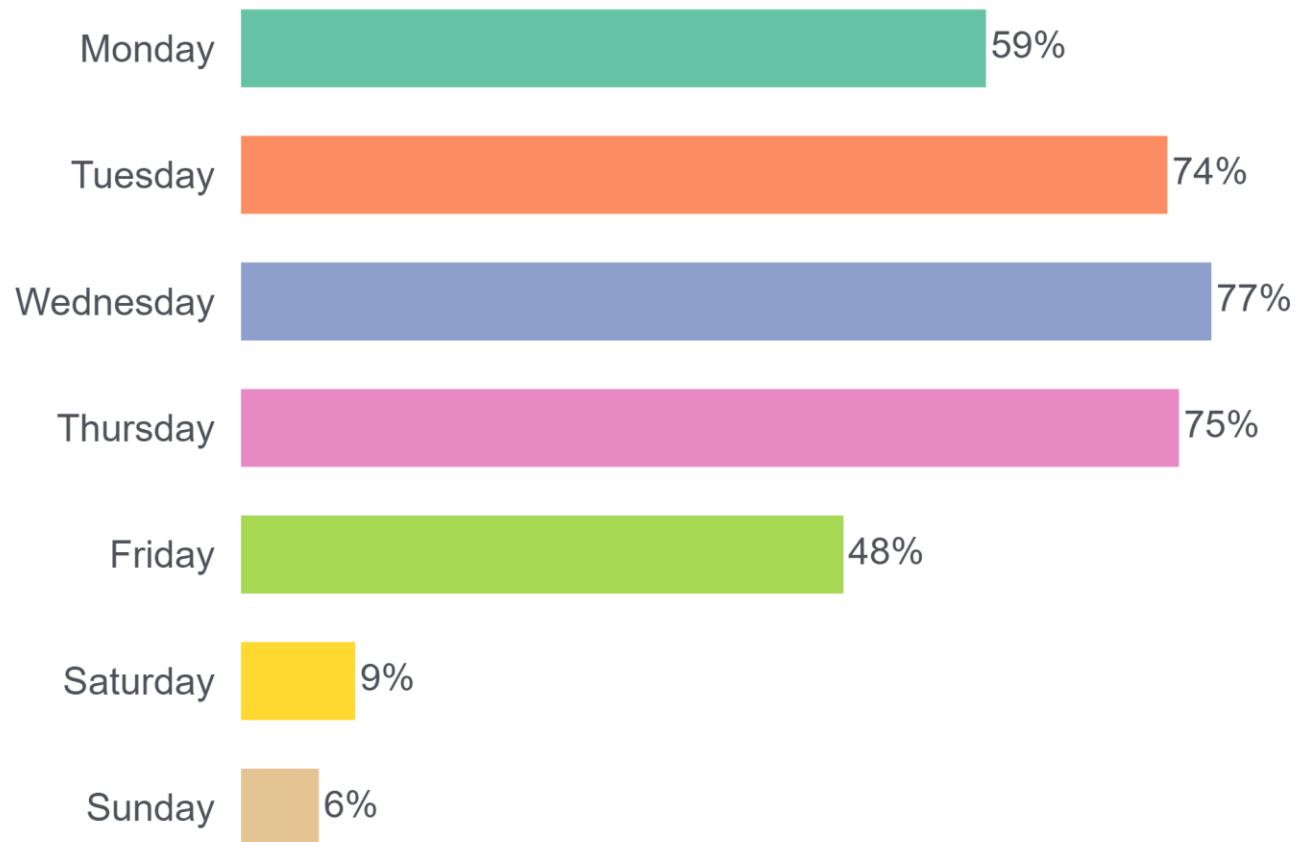
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# Days of the Week Working in Office / On Site



In a typical week, which days of the week do you work in the office / on site?



- Within the DCC area, 65% of 35-49 year-old workers are in the office / on-site on Thursdays, and 39% on Fridays

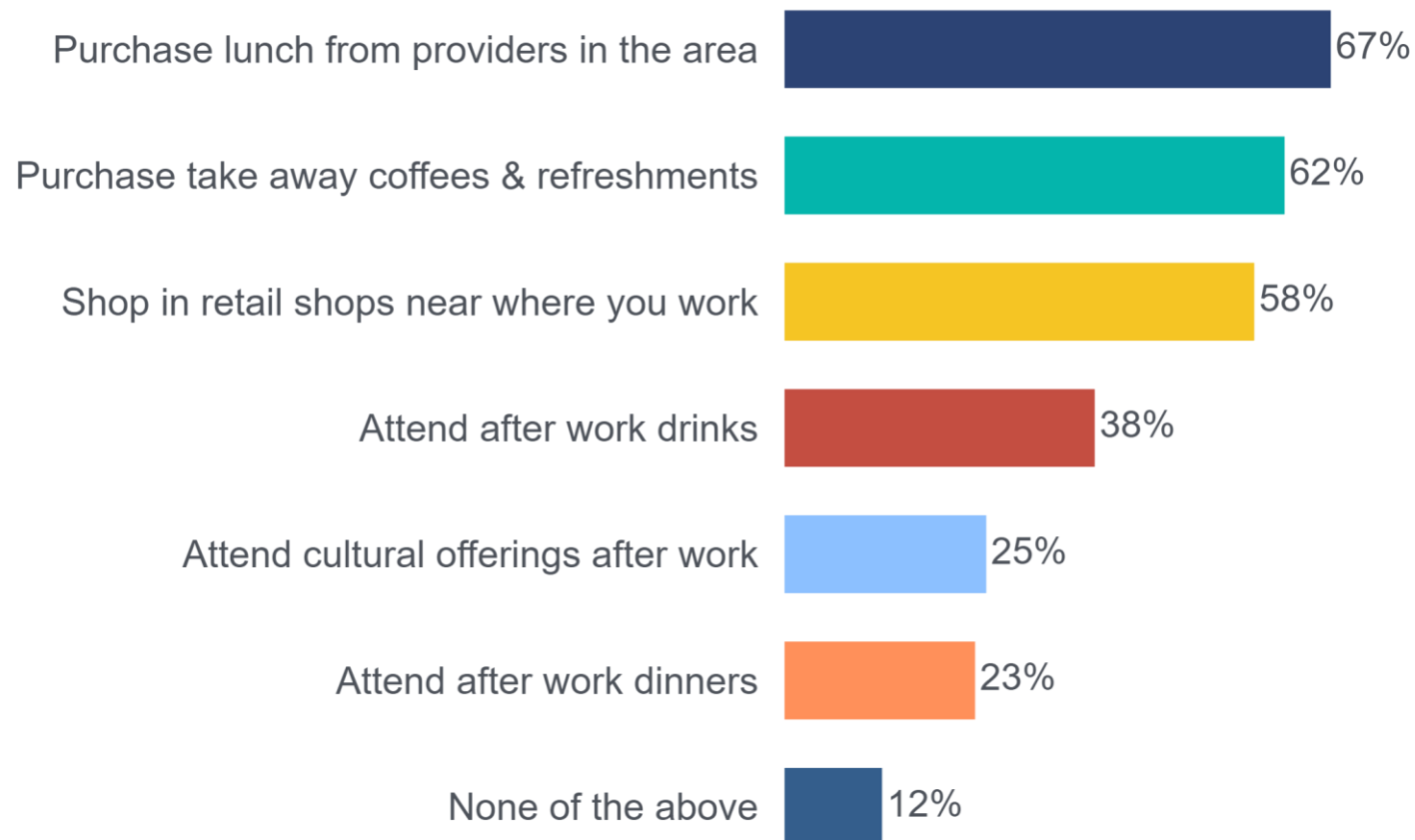
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# Local Spend Among those Working in the Office / On Site

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

**% selecting**



- 35-49 year-olds are more likely to purchase lunch and purchase take-away coffees when at work in the office or on-site

- 18-34 year-olds are more likely than older workers to attend after work drinks

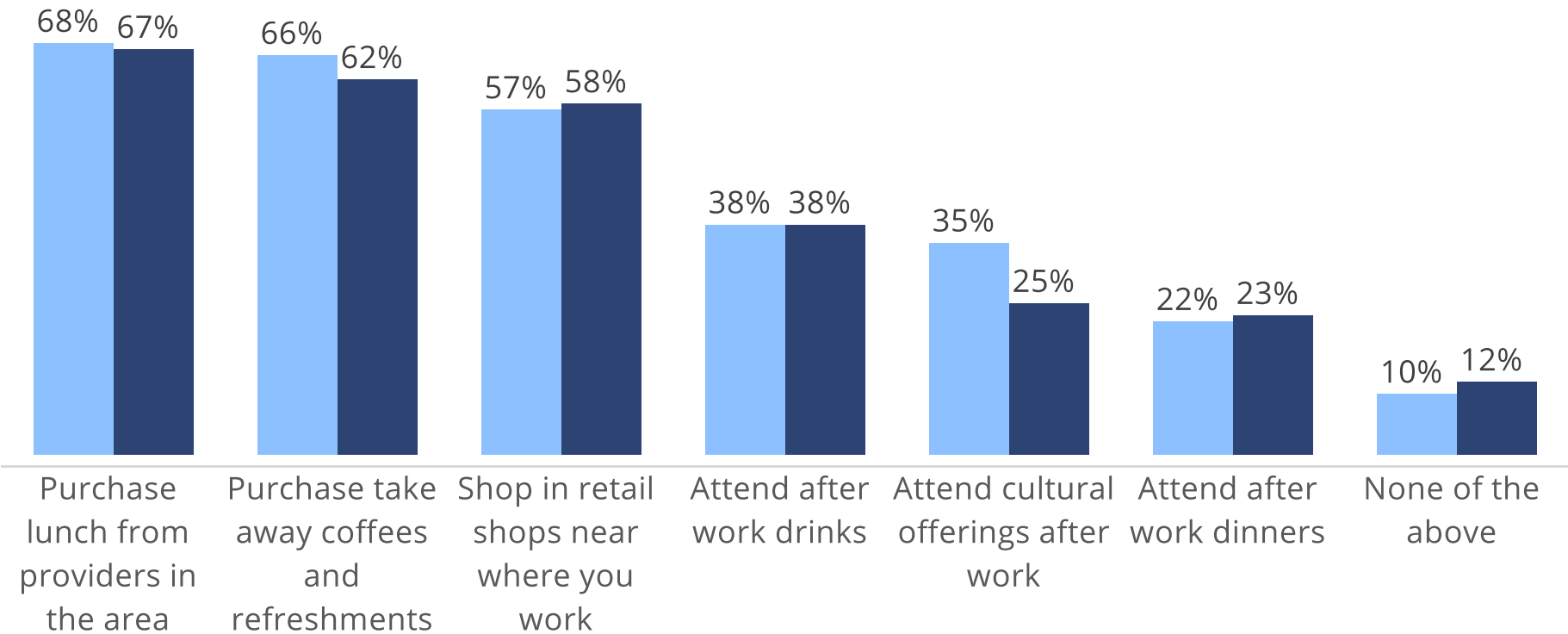
- Those with dependent children are significantly less likely to engage in after work activities

- "None of the above" rises to 28% among those with less than €100 disposable income per month



# Local Spend Among those Working in the Office / On Site - Trend

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



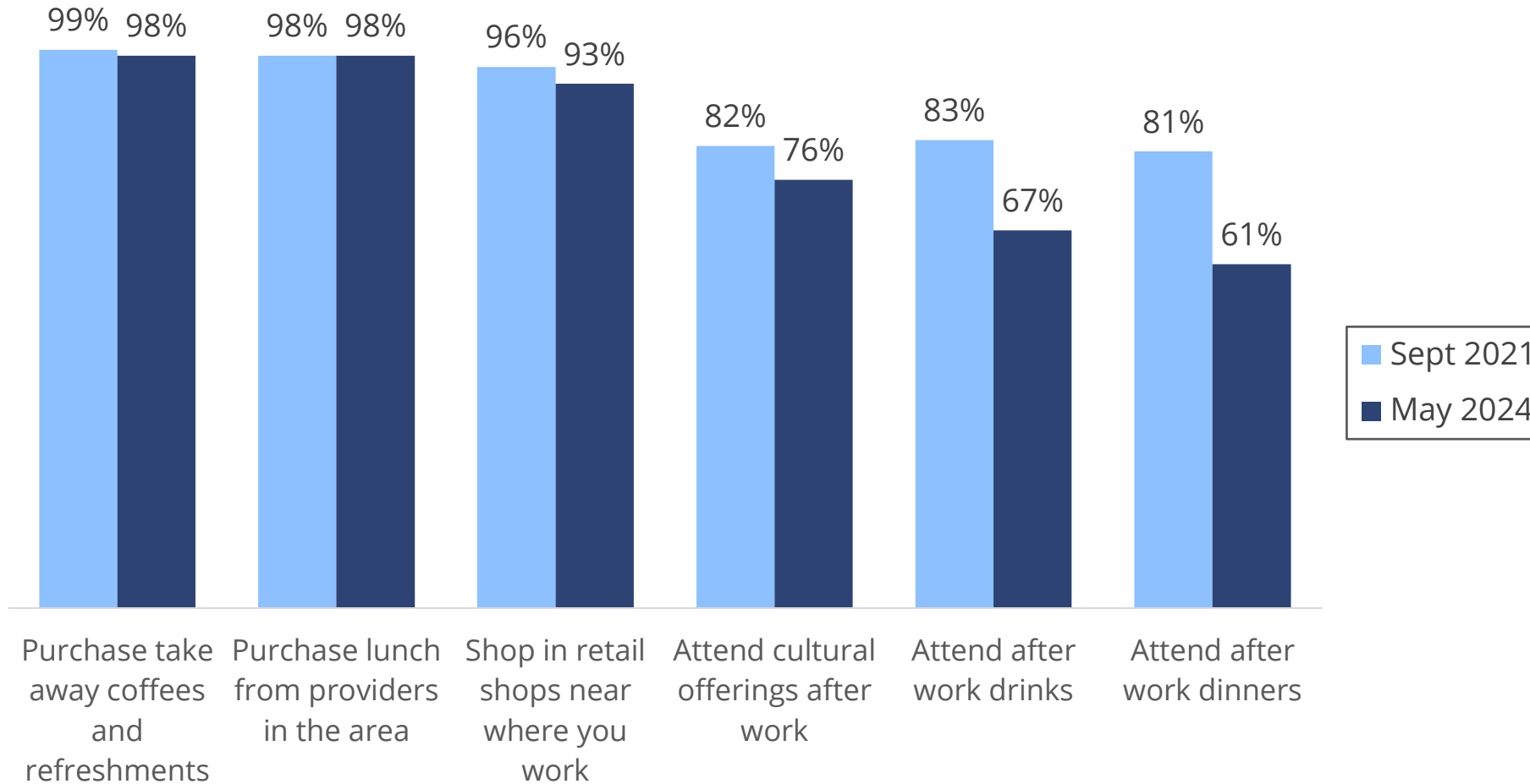
• Respondents are less likely to attend cultural events after work with any frequency compared with 2021.

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# Frequency of Local Spend - Trend (at least once a month)

When at work in the office or on-site, how often do you...  
**% at least once a month**



Base: varies - only asking those engaging in each activity

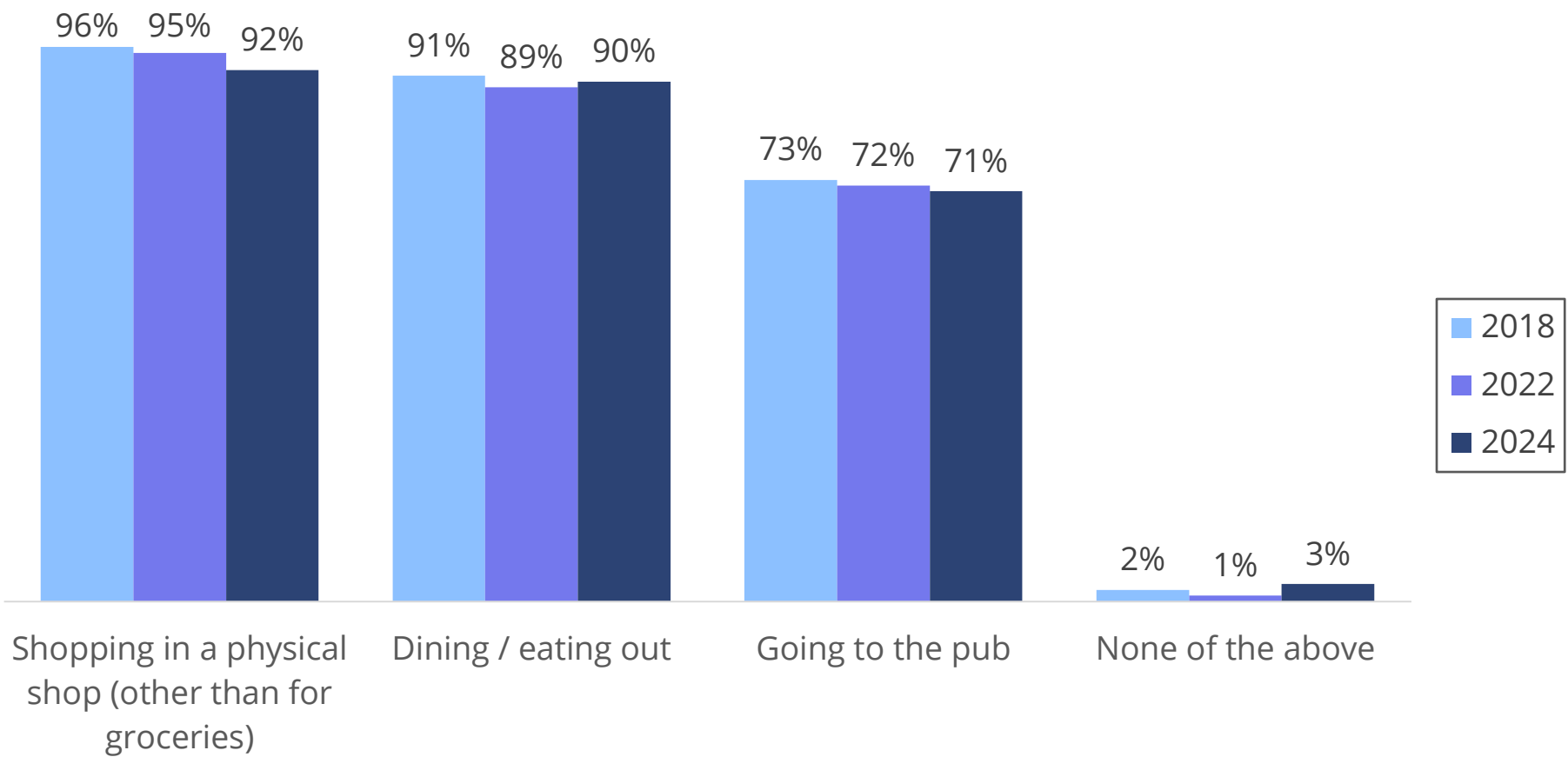


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# Engaging in Shopping and Socialising in Dublin - Trend

Do you ever do any of the following in Dublin City or in the Dublin region? Please select as many as apply.  
% selecting activity



Base: 1058



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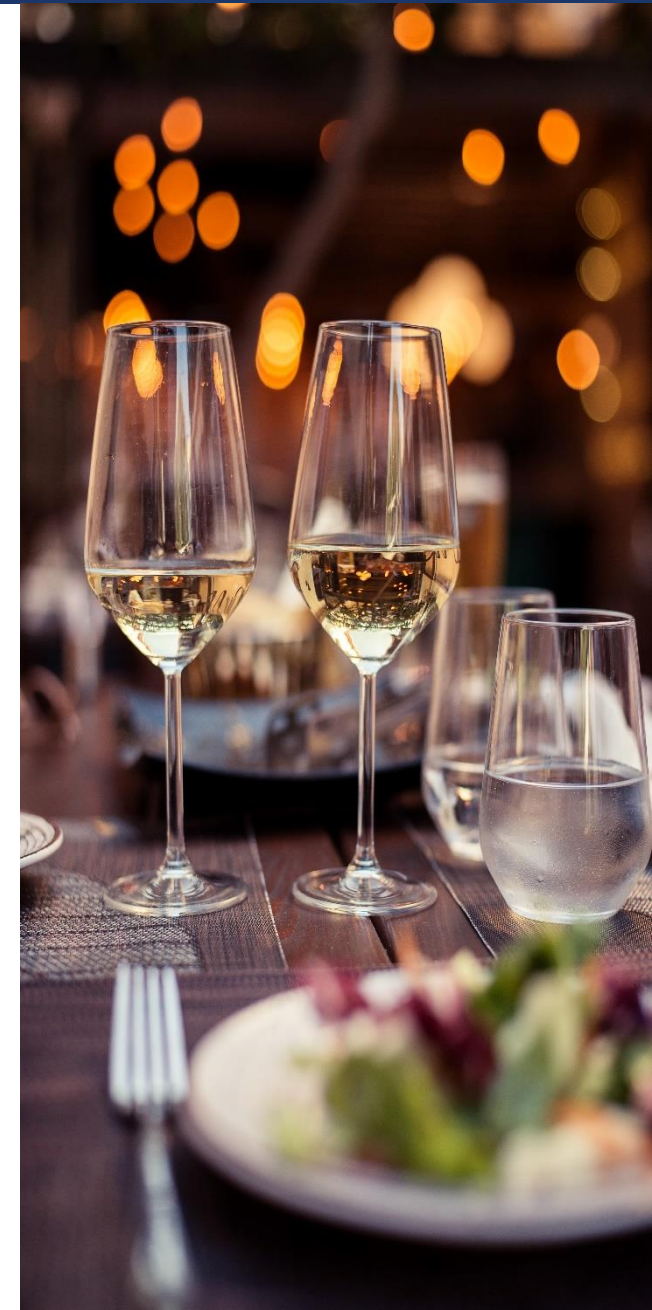
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# Frequency of Engaging in Shopping and Socialising - Trend

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



Base: varies - only asking those engaging in each activity

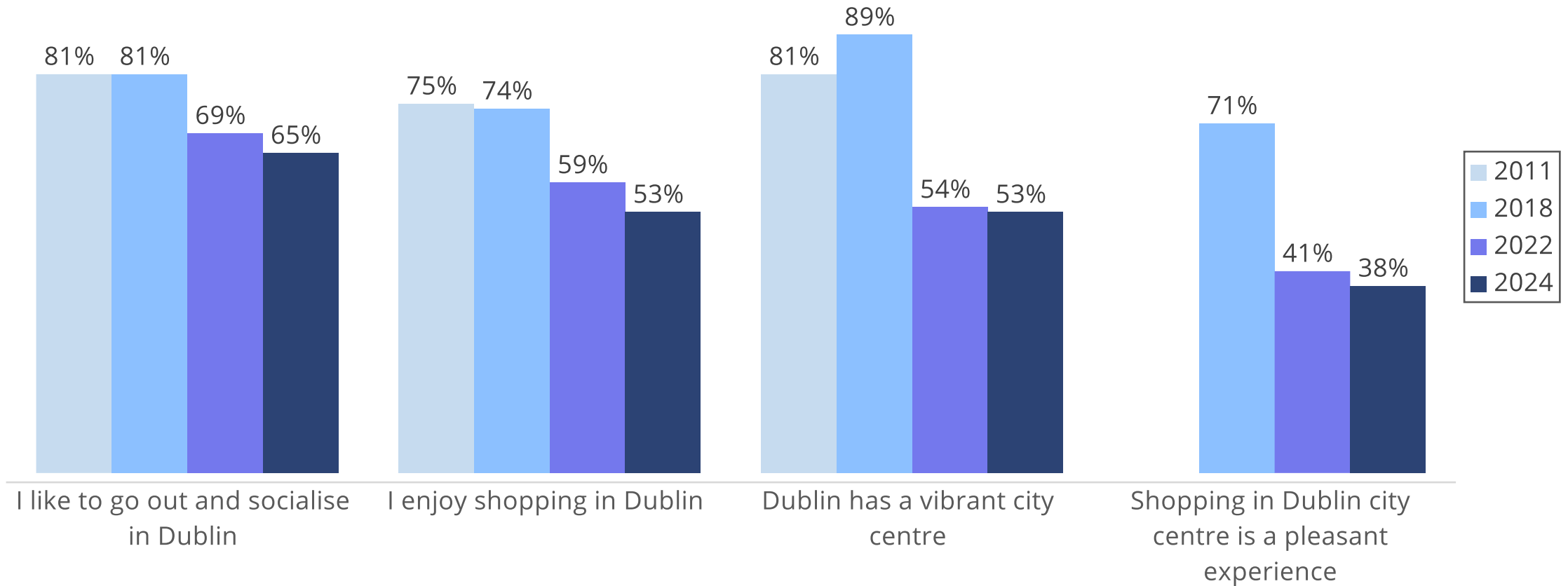


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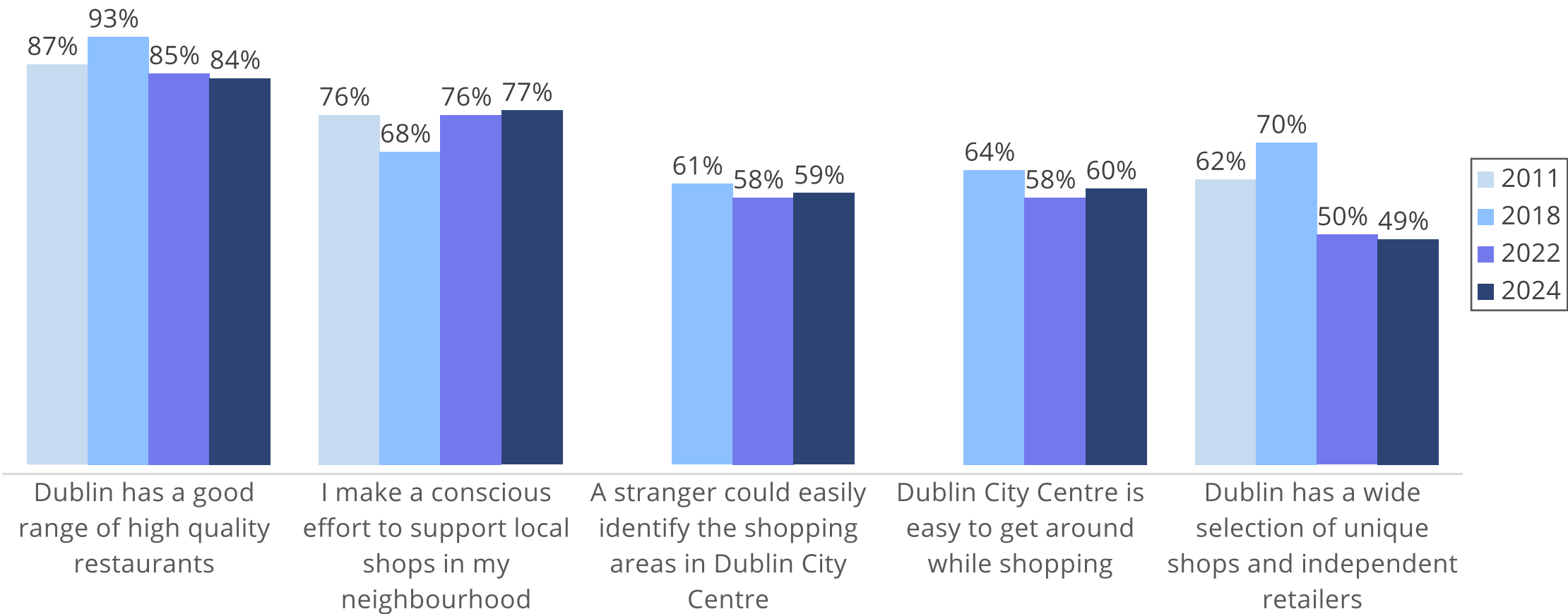
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Please indicate your level of agreement with the following statements about Dublin:  
% agree or strongly agree



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% agree or strongly agree

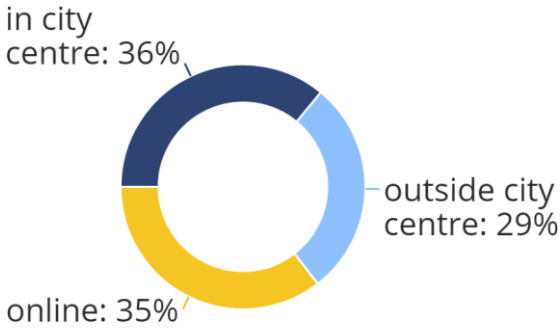


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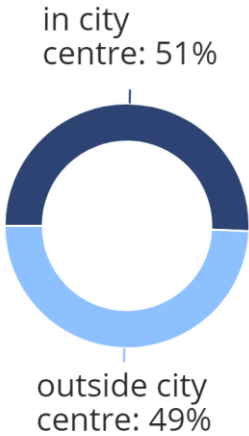
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How do you divide your spend\* between city centre, suburban / out of town areas / online (Please give a percentage for each)

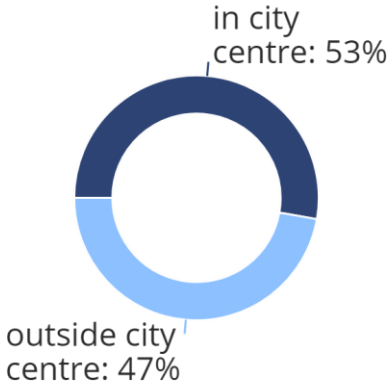
clothes / fashion



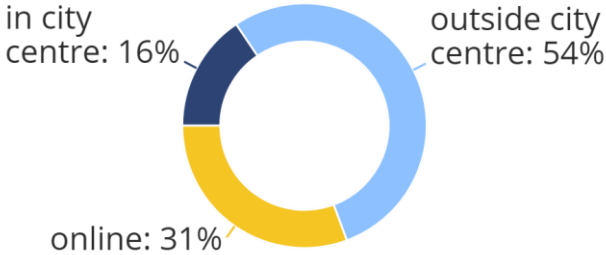
going to the pub



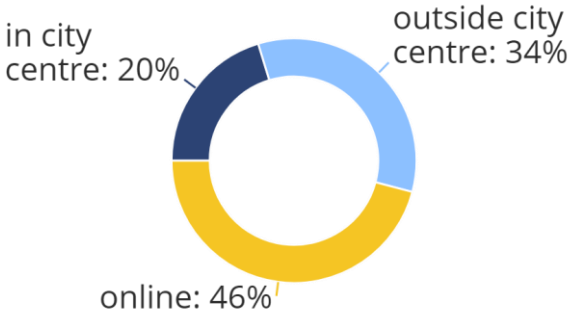
eating out



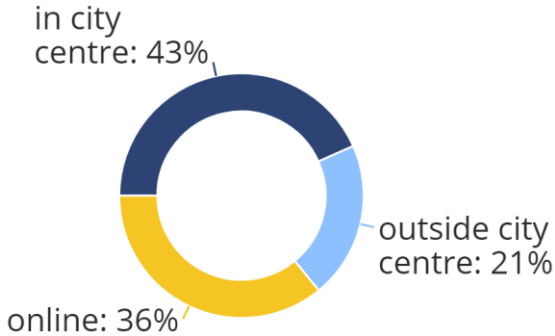
houshold durables



personal electronics

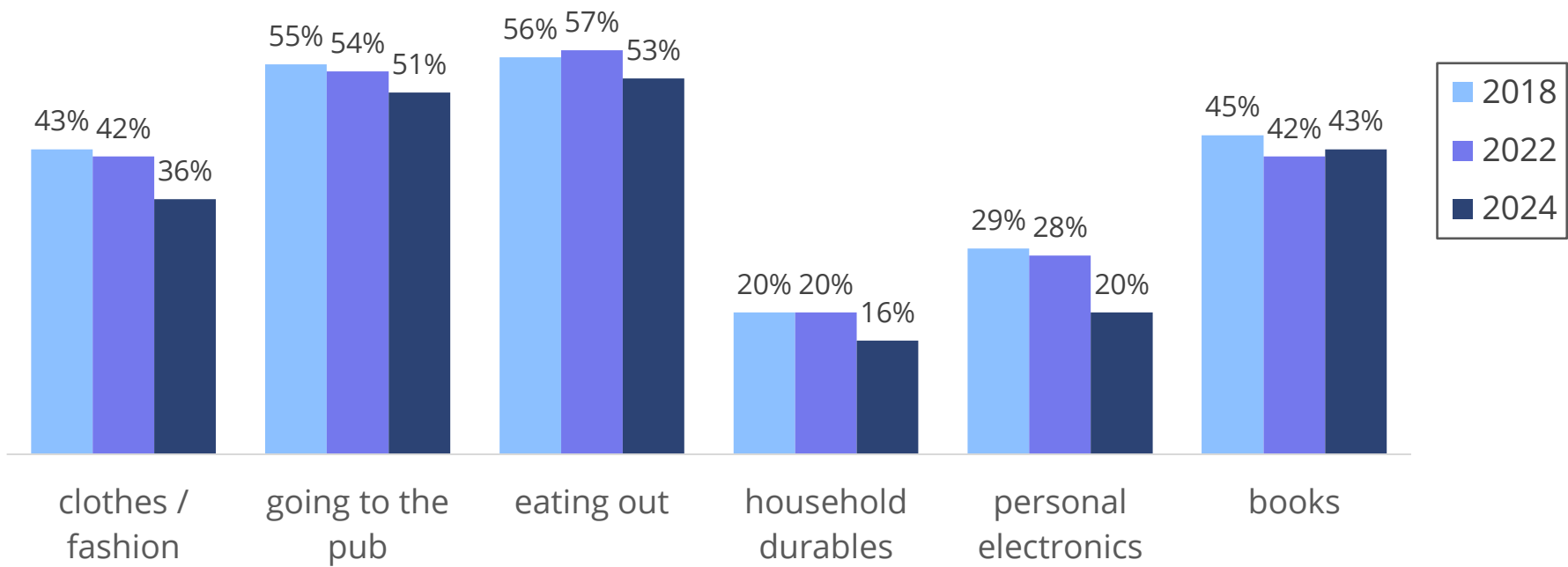


books

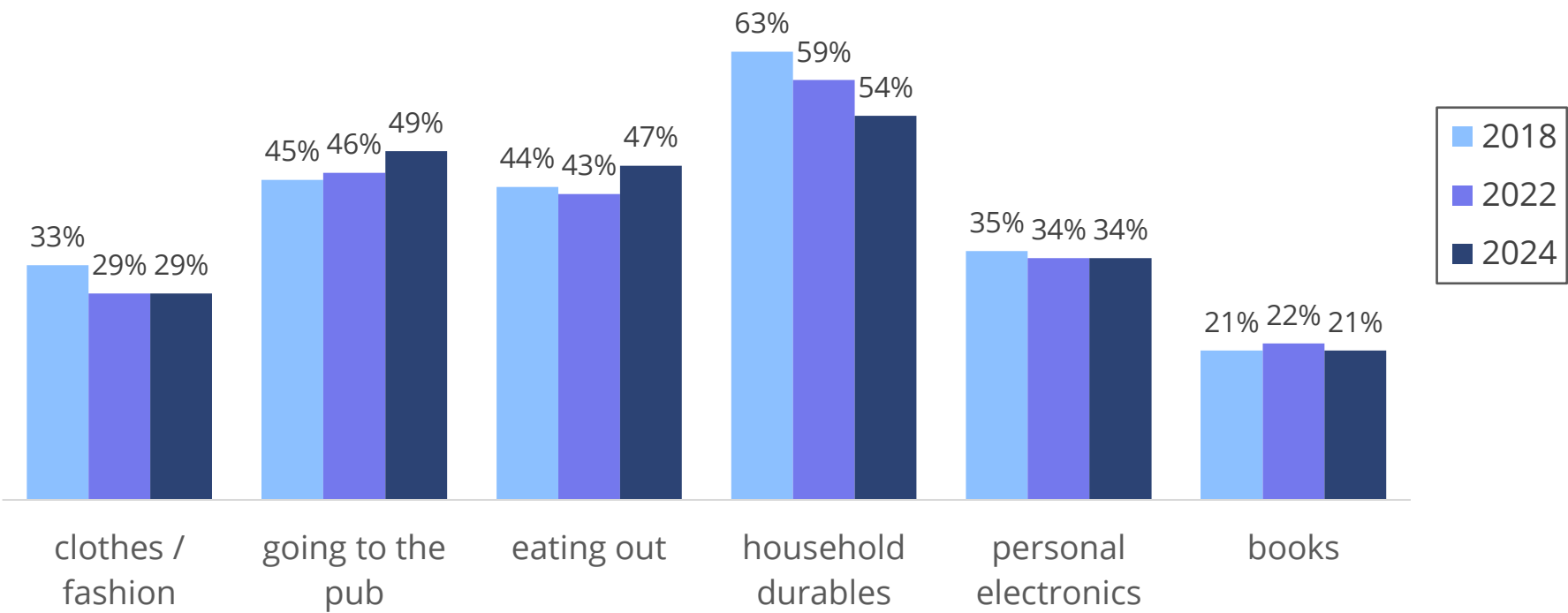


\* for pub and eating out “time” was estimated instead of spend

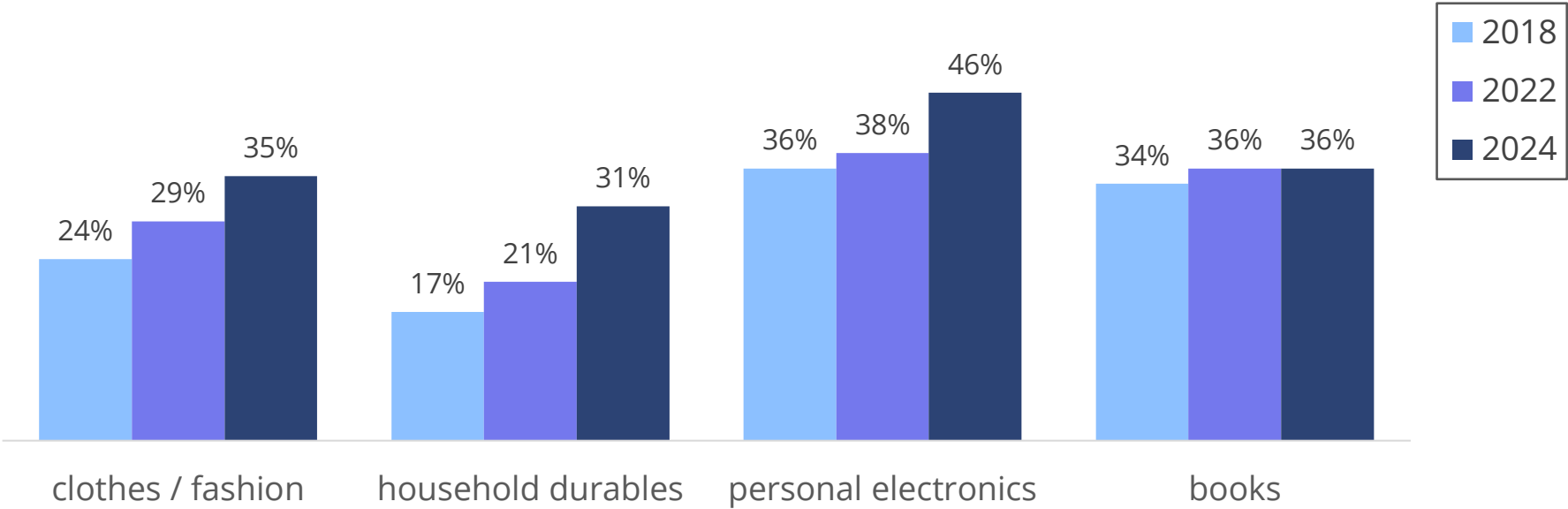
How do you divide your spend between city centre, suburban / out of town areas / online  
**% city centre**



How do you divide your spend between city centre, suburban / out of town areas / online  
**% suburbs**



How do you divide your spend between city centre, suburban / out of town areas / online  
**% online**

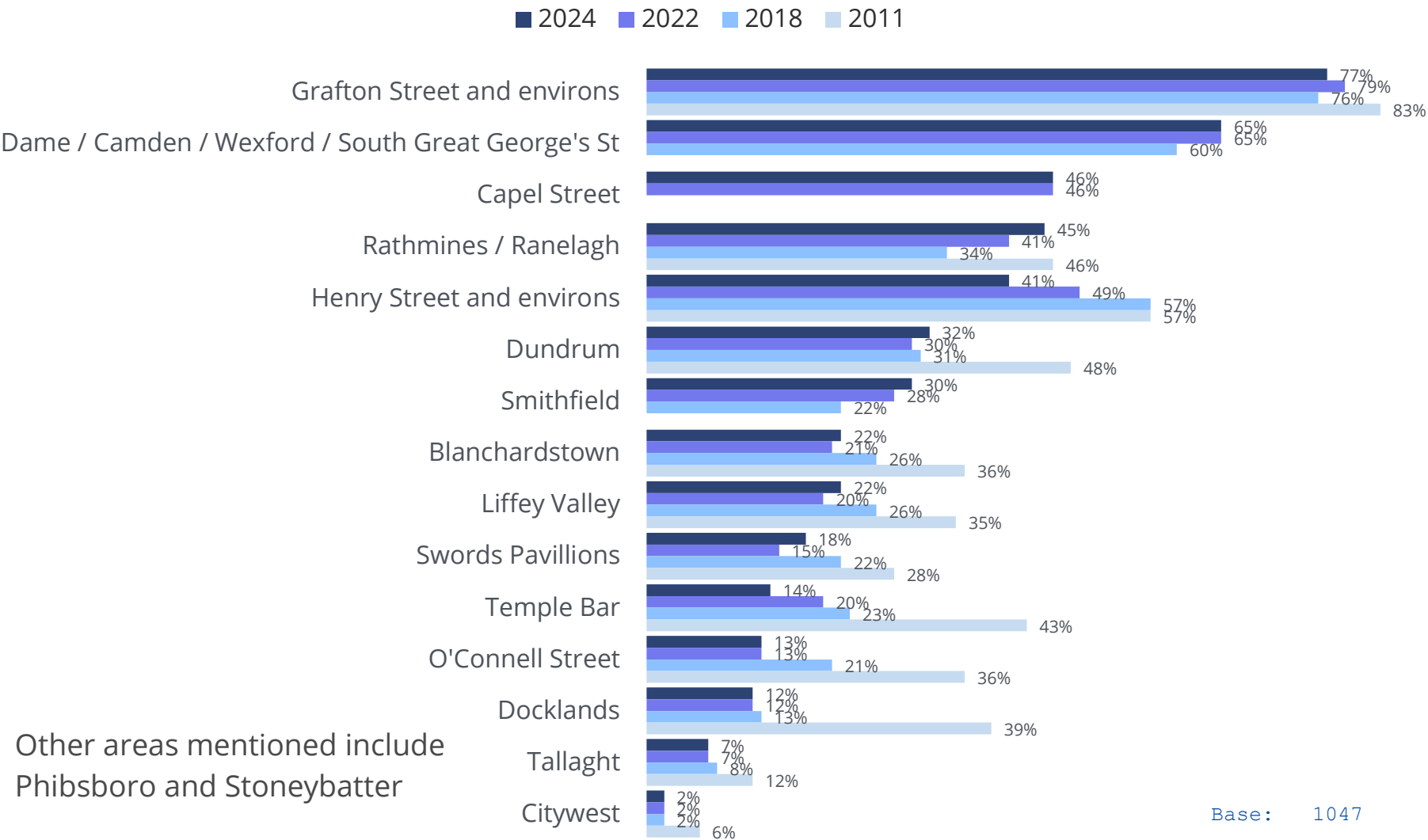


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# Appeal of Areas in Dublin - Trend

From the following areas in Dublin, please select the areas that you find appealing, specifically in relation to shopping and socialising. Please select as many as apply.

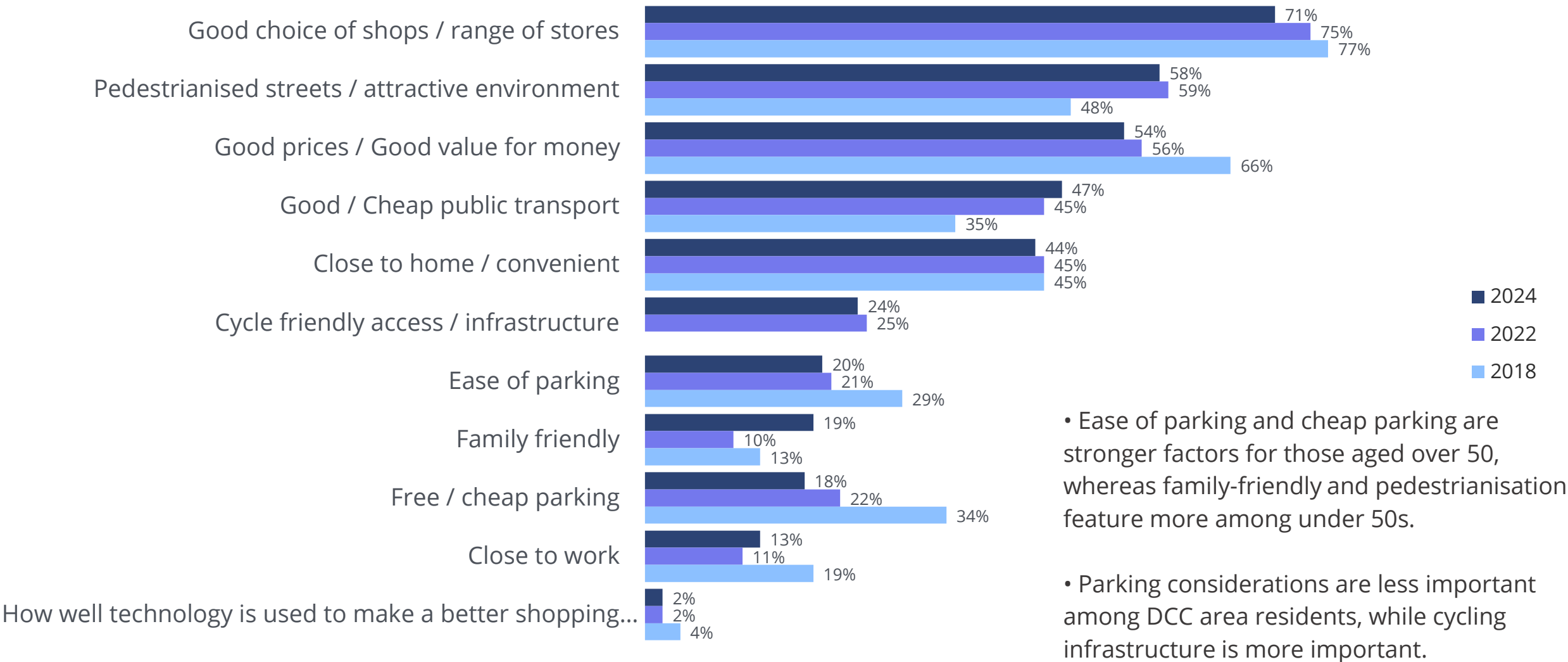


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# Factors Influencing Where You Shop - Trend

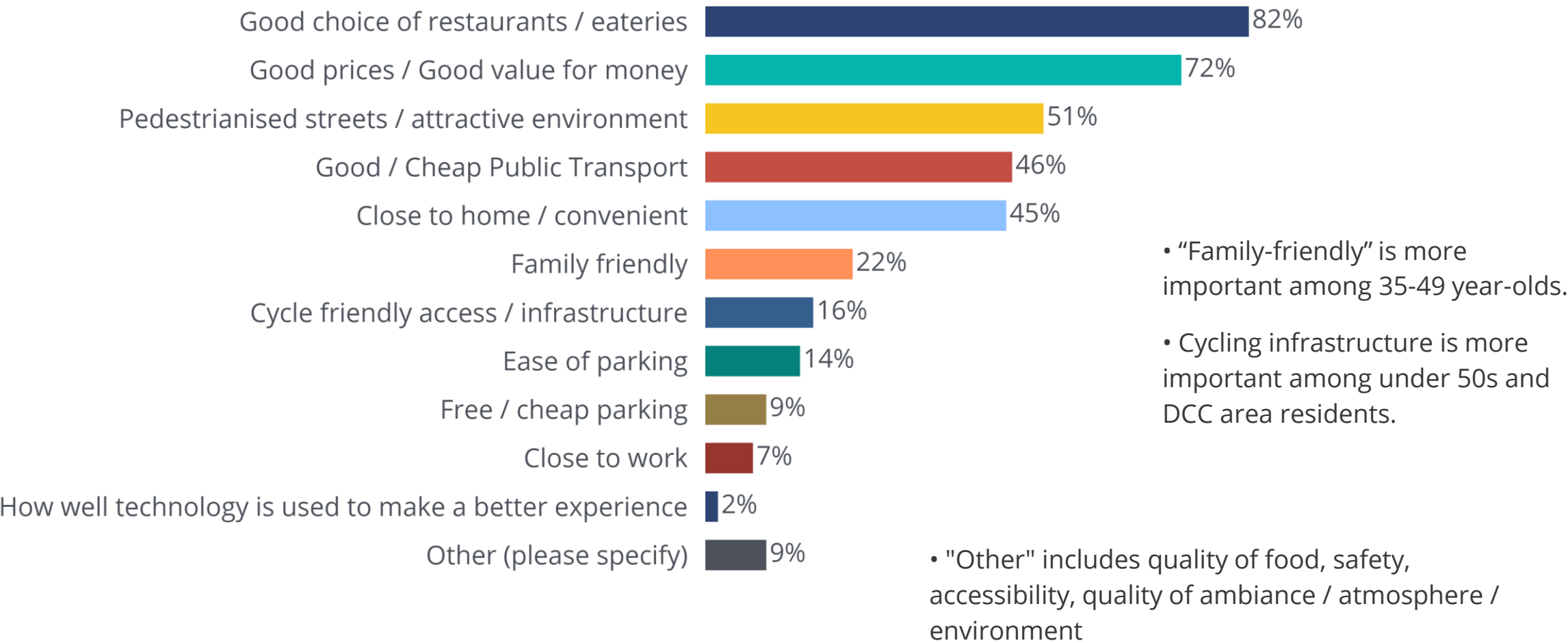
Please select the top 4 most important factors that influence where you shop in Dublin in physical stores (excluding shopping for groceries)



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Please select the top 4 most important factors that influence where you dine / eat out in Dublin

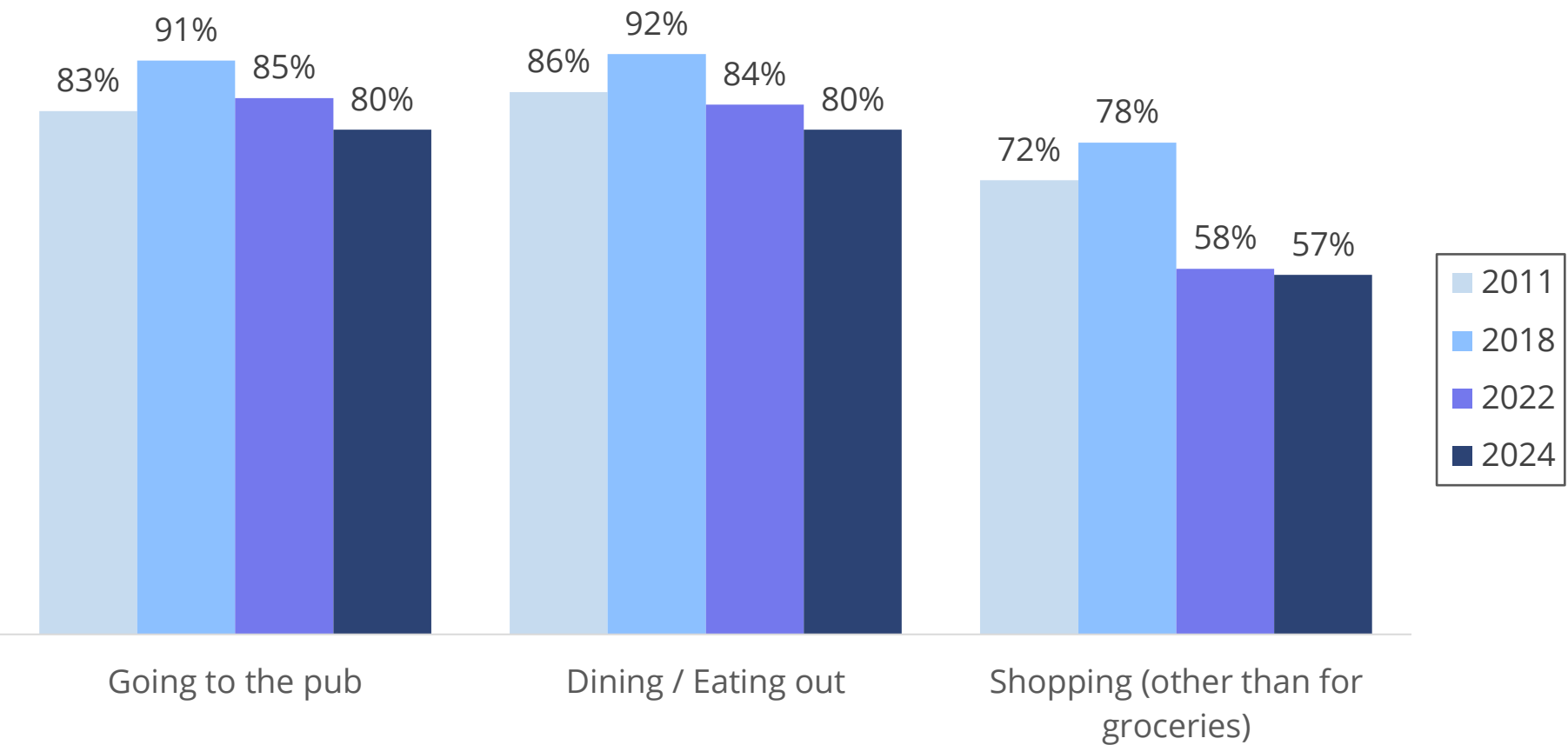


# Agenda

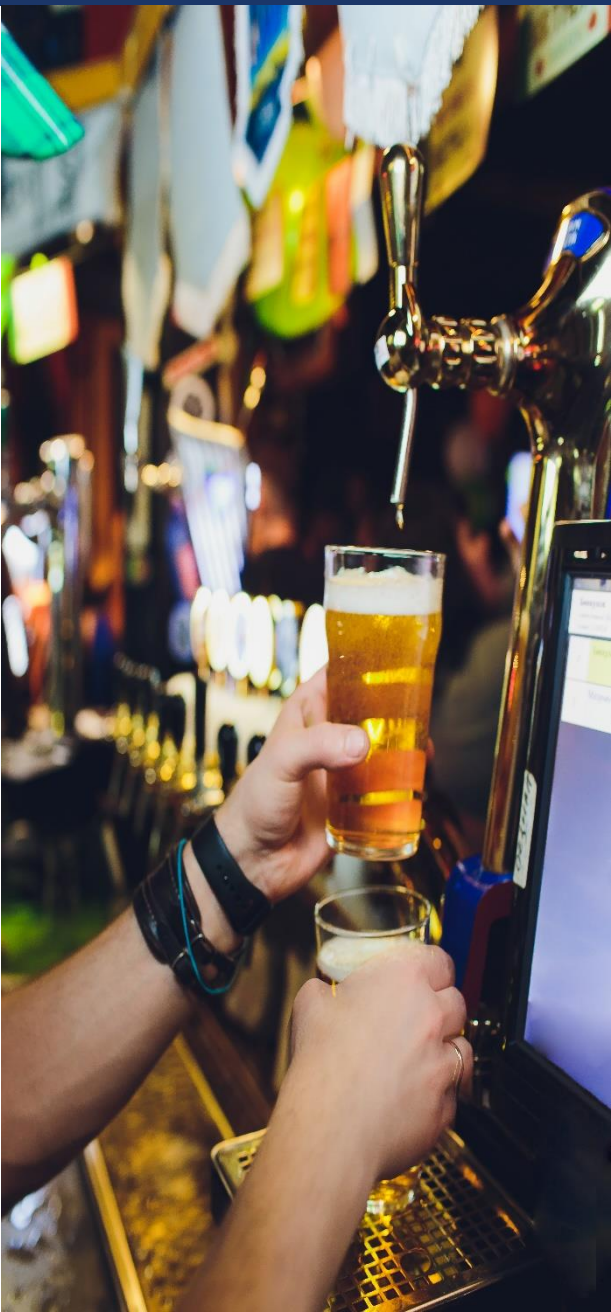
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# Overall Rating of Shopping and Leisure in Dublin - Trend

Overall how would you rate your experience of Dublin in relation to the following shopping and leisure activities?  
% good or excellent



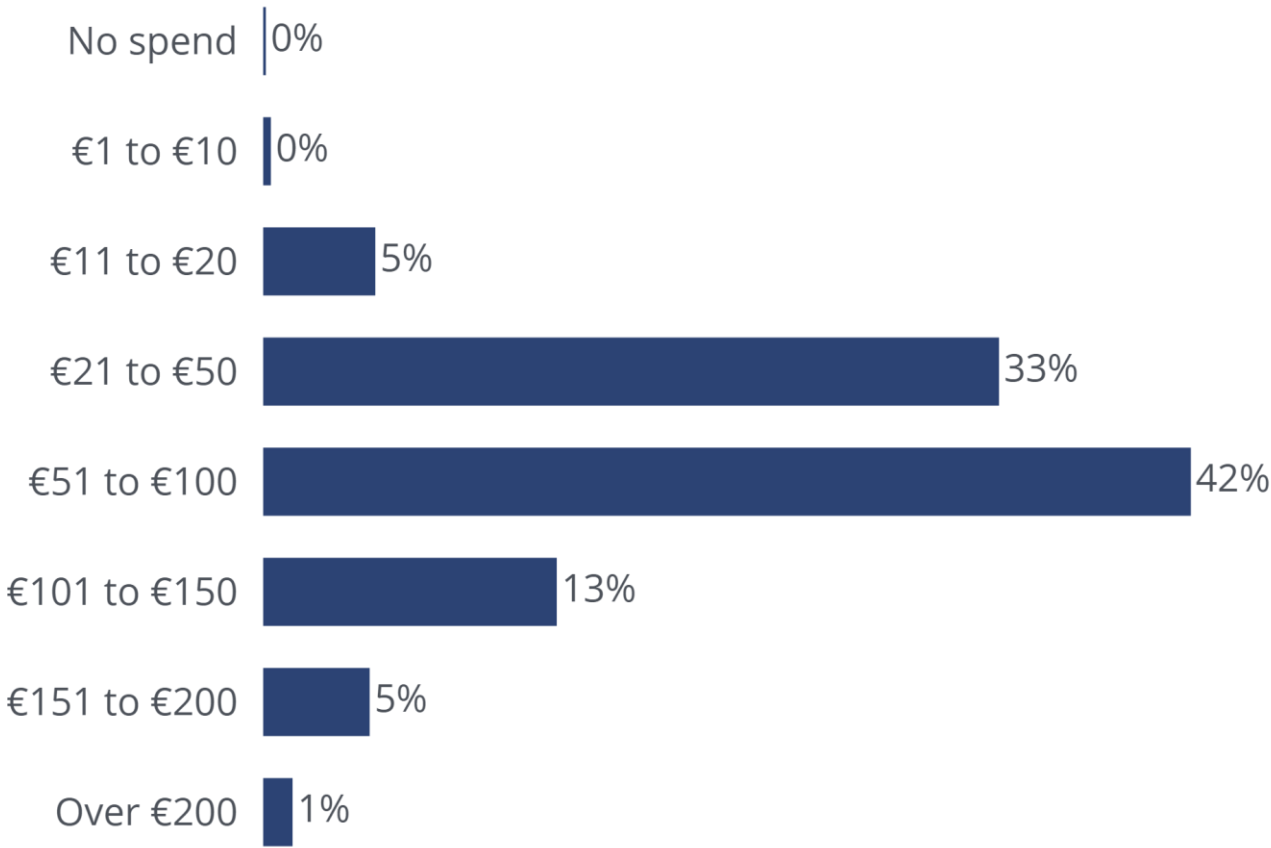
Base: varies



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When you eat out in Dublin, approximately how much do you typically spend on an evening meal, including any drinks with your meal?

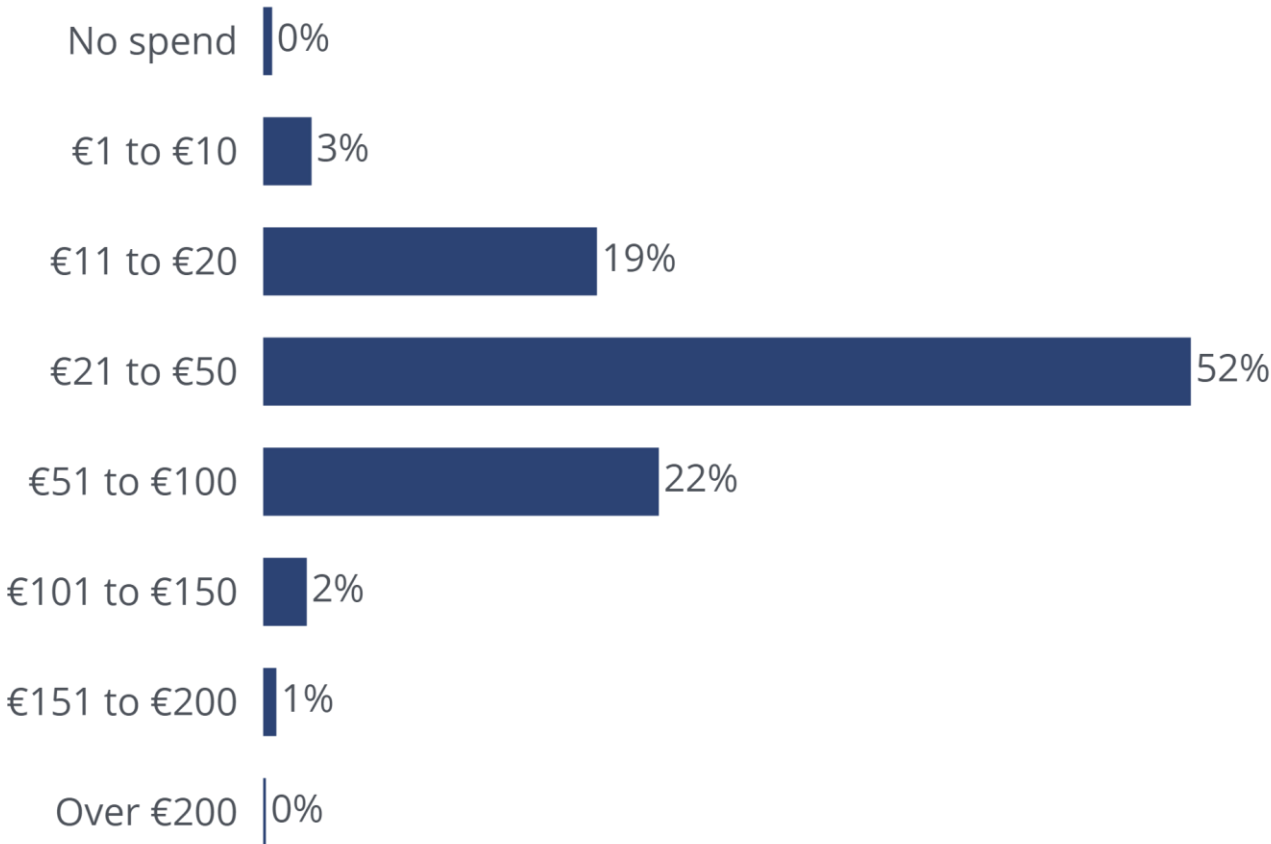


average spend

€72.27



When you go to the pub in Dublin, approximately how much do you spend on a typical visit?



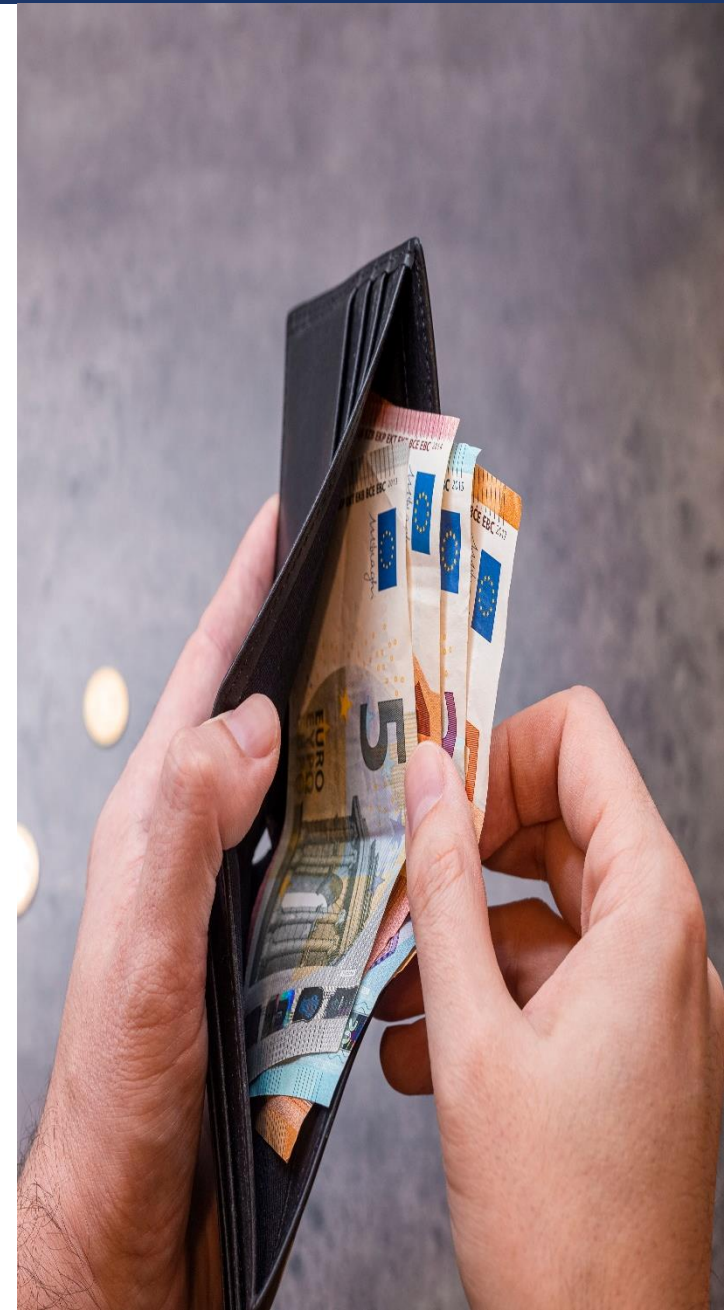
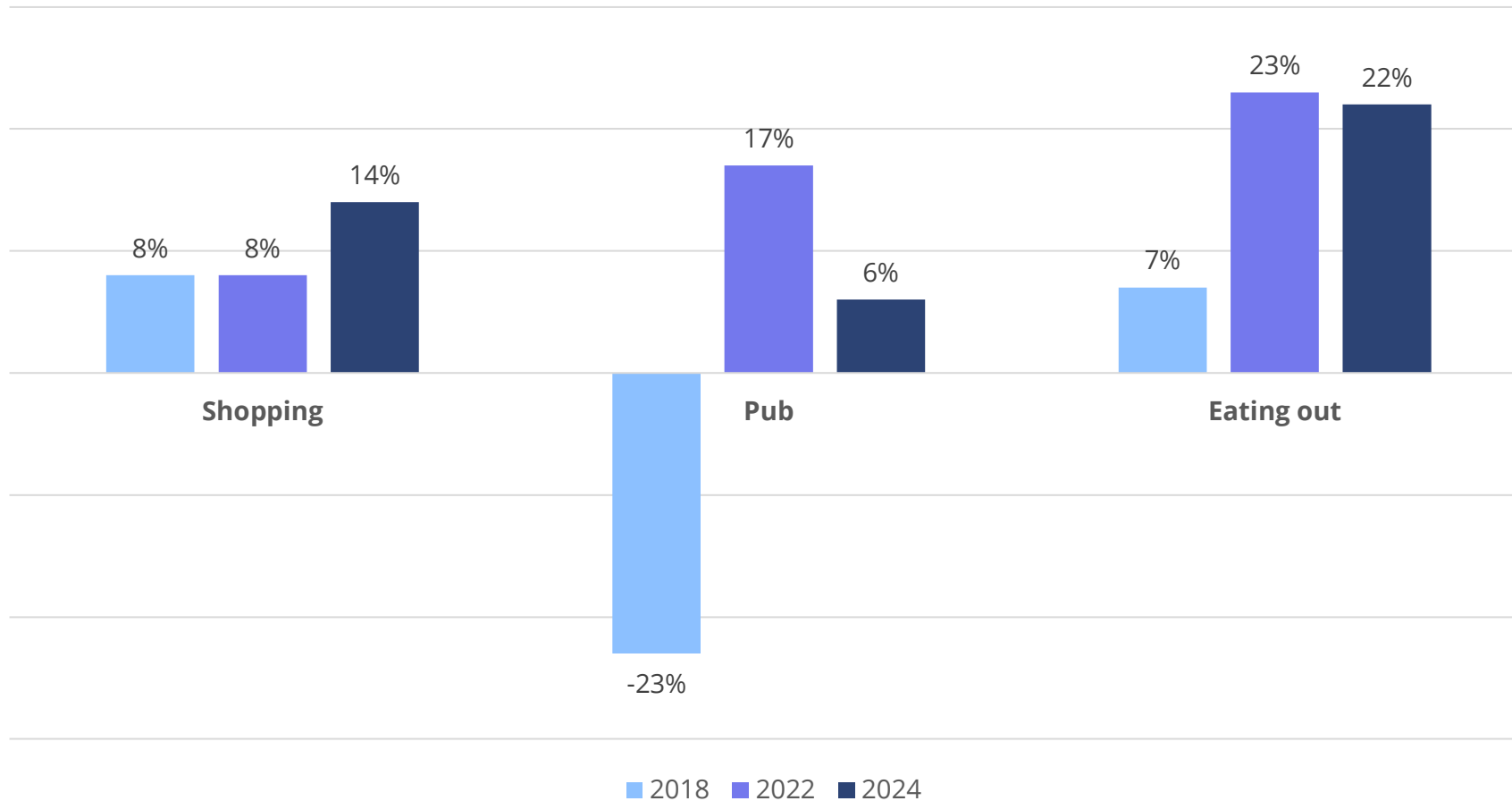
average spend

€43.22



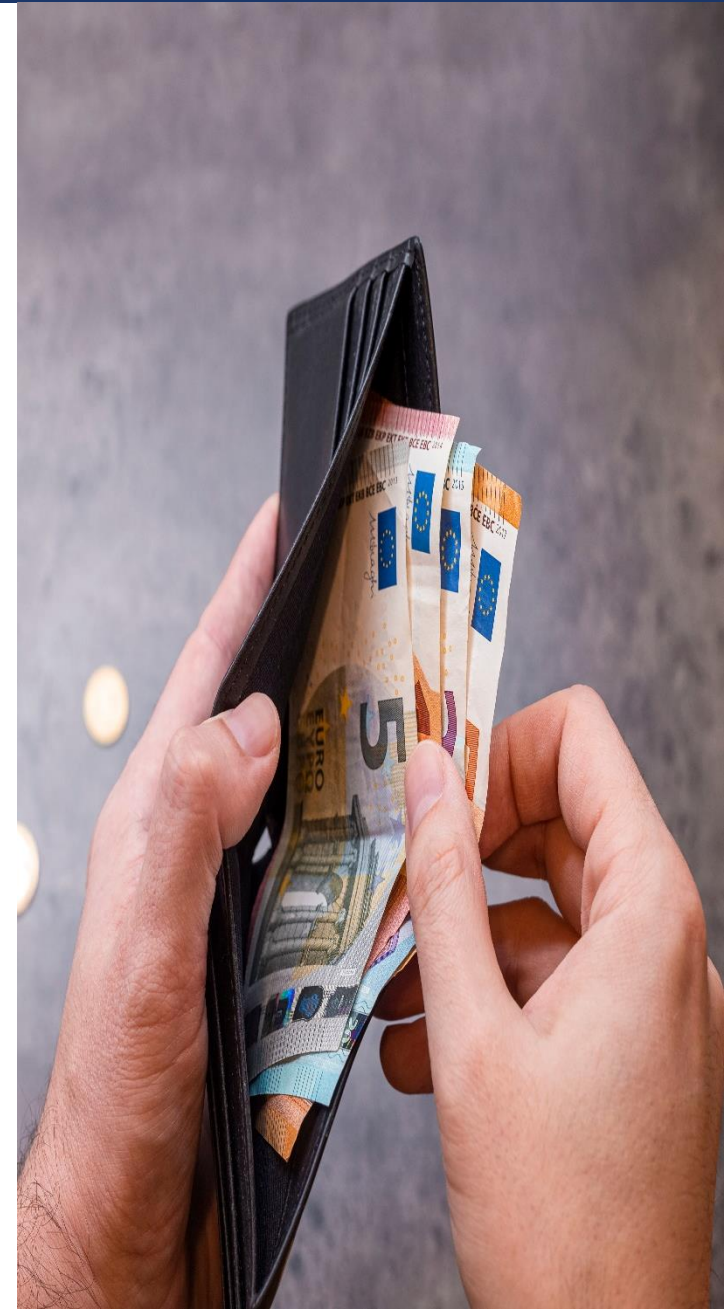
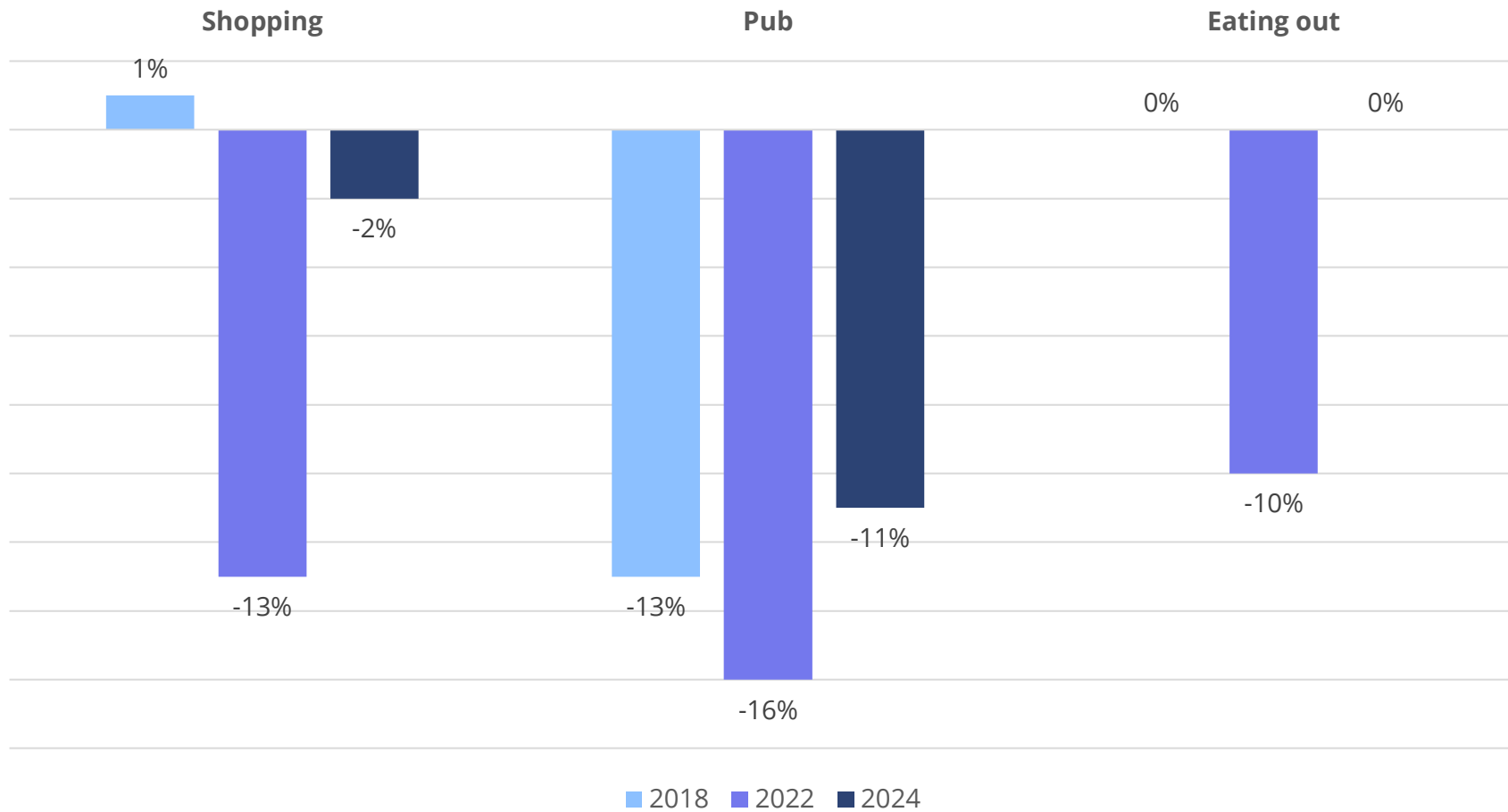
# Spend Compared with Last Year - Trend

Compared with this time last year, are you currently spending more, less or about the same on shopping and leisure activities?  
net change (self-reported)



# Anticipated Spend in the Next 12 Months - Trend

In the next 12 months, do you think you will be spending more, less or about the same on shopping and leisure activities?

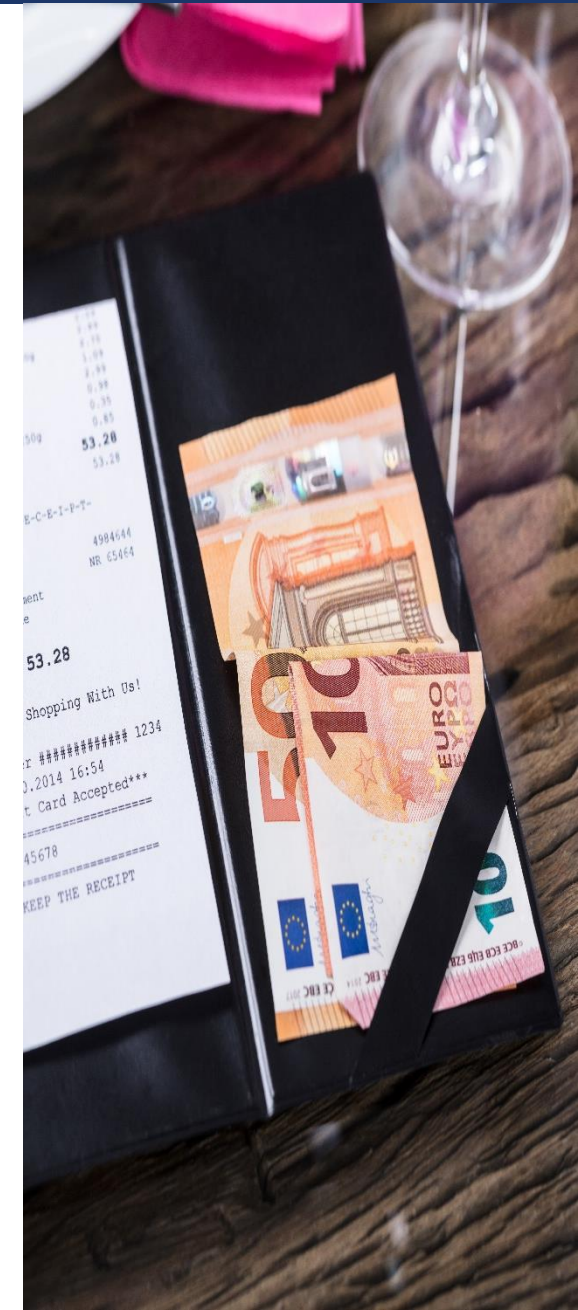
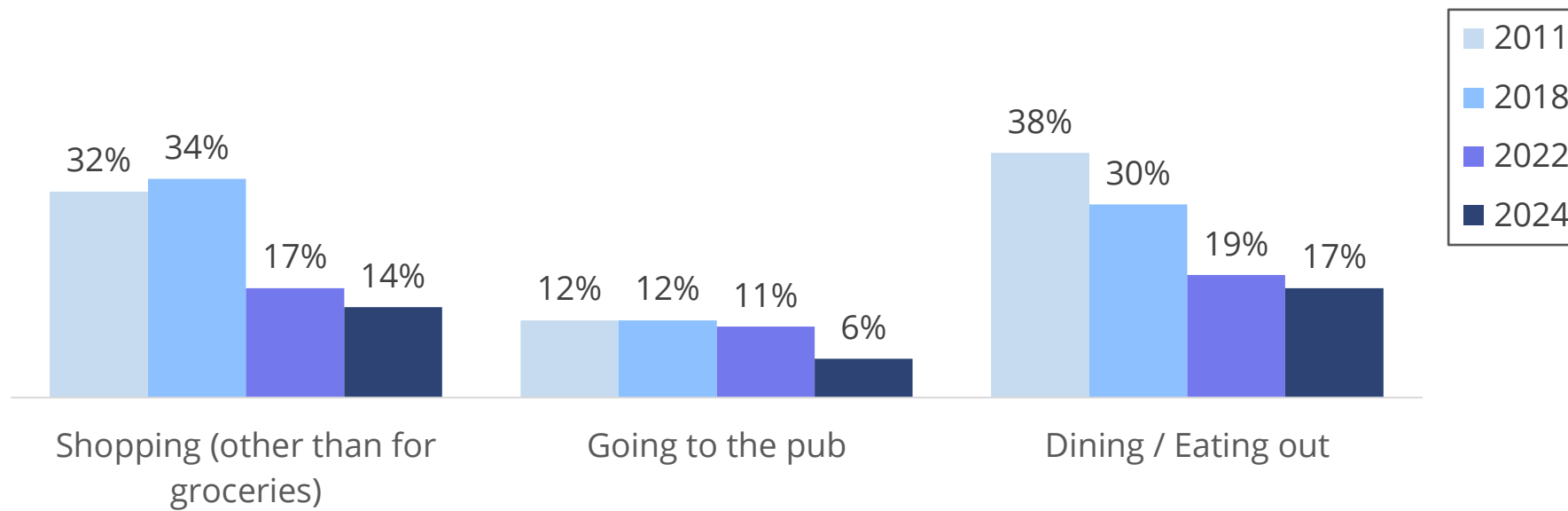


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How would you rate the value for money on offer in Dublin for the following shopping / leisure activities?

% good or great value for money



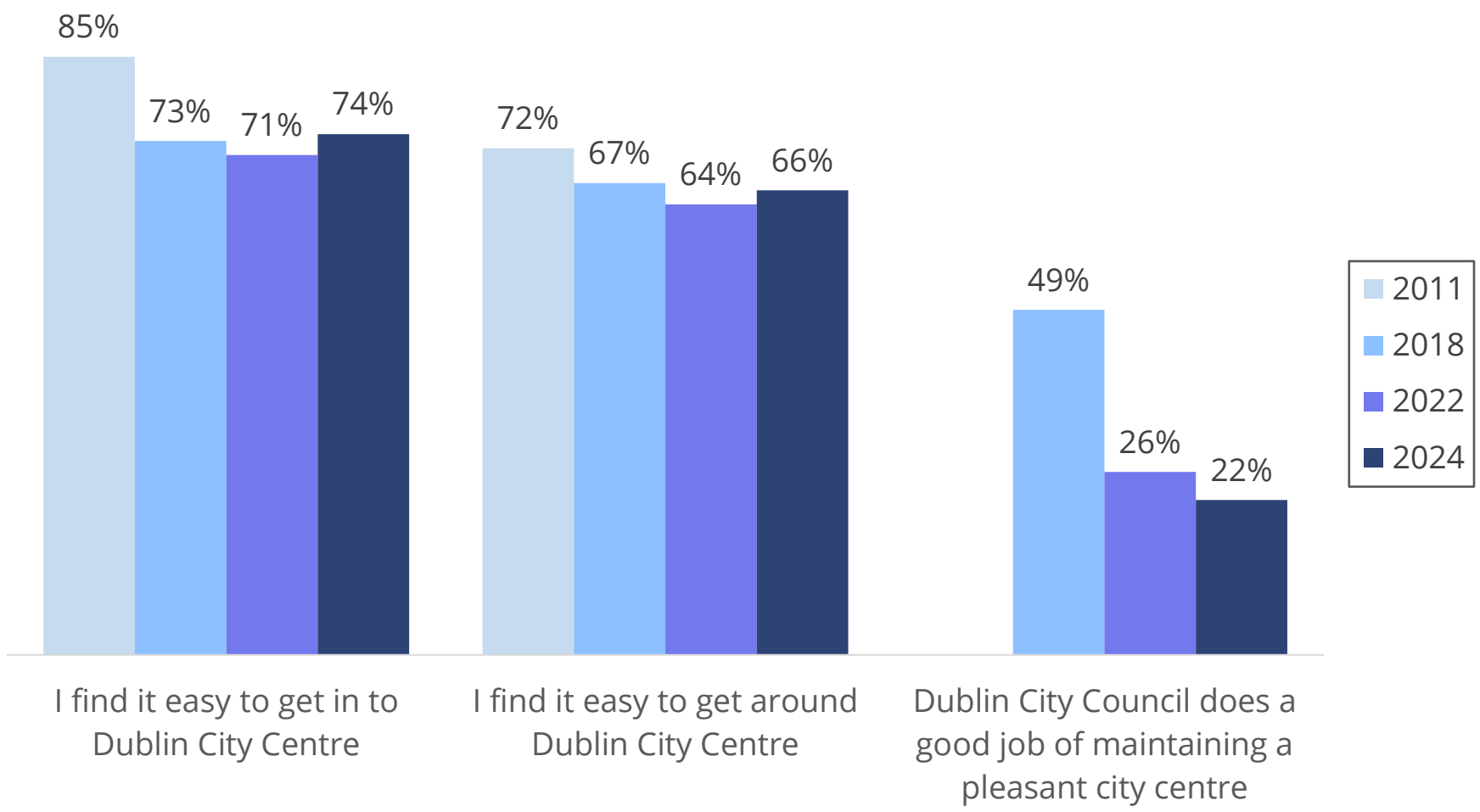
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# Ease of Getting in and Around Dublin City Centre - Trend

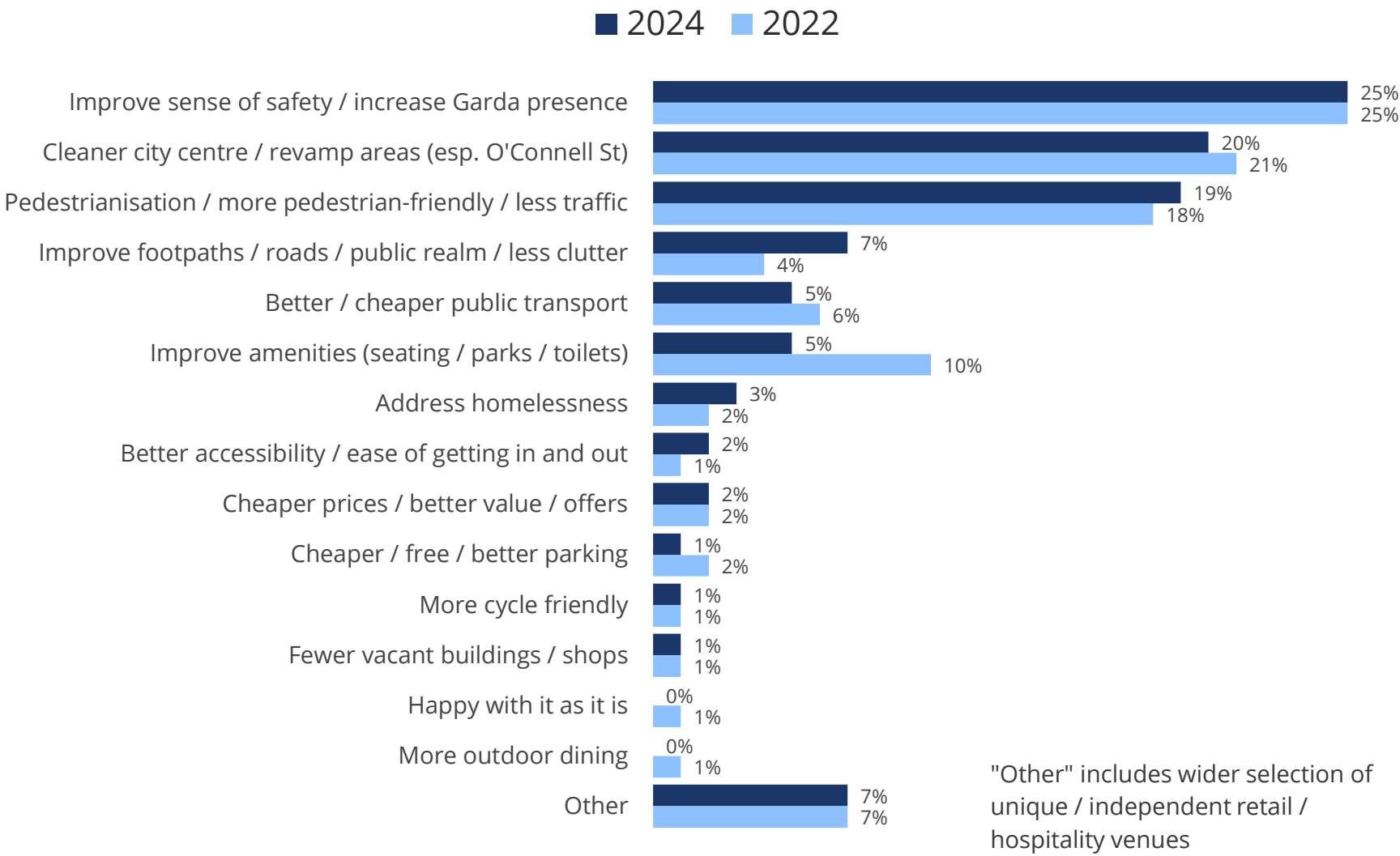
Please indicate your agreement with the following statements:  
% agree or strongly agree



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What would make Dublin city centre a more attractive place for shopping and socialising?  
(like-for-like comparison)



For further information please contact:

Economic Development Office  
Dublin City Council  
01 222 5611  
[research@dublincity.ie](mailto:research@dublincity.ie)



Comhairle Cathrach  
Bhaile Átha Cliath  
Dublin City Council



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