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Your Dublin Your Voice - Retail Survey December 2018

Introduction

The Economic Development Office conducted its 2nd “Your Dublin Your Voice” survey in December. Against a backdrop of uncertain times for retail, we decided to ask Dubliners for their opinion on shopping and socialising in the city and identified the run up to Christmas, when these matters are usually at the forefront of people’s minds, as a good time of year to ask the questions. The survey received a robust response rate of 23% and with an engaged panel which is evidenced by the responses to the free form/opinion type questions. There was a similar survey conducted with the panel in 2011 which allowed for some comparisons.

The following were the key findings:

- 1:** The results were broadly very positive. 89% of the respondents either agreed or strongly agreed that Dublin has a vibrant city centre and only 5% disagreeing or strongly disagreeing. This is an improvement on the 81% seen in 2011. The overall impression of the city is positive and improving.
- 2:** Despite this the proportion of those who enjoy shopping in the city has slipped to 74% from 85% previously. While there is no change to the proportion – 81% - who enjoy socialising in Dublin.
- 3:** Daytime safety is becoming a bit more of an issue with 72% feeling safe in the city during the day compared to 76% in 2011. It is of particular concern to those with children. Only about 40% feel safe in the city at night but this has not changed in the last 7 years.
- 4:** Taking a closer look at shopping:

- 70% believe that Dublin has a wide selection of unique shops and independent retailers, an improvement on the 62% measured in 2011. However, local shops have lost some ground with the proportion of those indicating that supporting local is important to them falling to 68% from 76% previously. This is lower again, 61%, amongst 18-34 year olds.
 - The city centre is the most popular location for shopping for books and fashion while white goods are predominately purchased in the suburbs, most likely in the retail parks. Approximately a third of people appear happy to buy homogenous items like Books and Personal Electronics online but this falls to a quarter for Fashion. Only 17% of respondents purchased Household Durable Goods online.
- 5: The positive experience of socialising in Dublin is driven by both its restaurants and pubs. Pubs are performing very well with 91% of people enjoying them, up from 83% in 2011. Similarly, 92% think that eating out in Dublin is good or excellent, up from 86% in 2011. A similar amount agree that Dublin has a good range of high quality restaurants, also a significant improvement. This sees 60% of people eating out in Dublin at least once a month and almost 50% going to the pub. These proportions are higher for the under 35s. Shopping frequency is lower particularly when it comes to white goods and electronics which people buy less often. Meanwhile a third of Dubliners shop for clothes on a monthly basis and a quarter buy books.
- 6: By the far the most important factor in influencing people's choice of where to shop is a range of good stores (77%) with good value (66%) also important. Only 4% indicate that technology is an influencing factor although this rises to 8% amongst 18-24 years-olds. That said 81% indicate that the pay by tapping while a further 35% use click and collect facilities, so it appears that shoppers are embracing technology. Both are most popular amongst 35-49 year olds. The use of loyalty cards and vouchers is also widespread.
- 7: Grafton Street continues to hold the most appeal of any area in Dublin with three quarters of those surveyed ranking it number 1. The George's Street Vicinity also showed strongly in second place just ahead of Henry Street. However while George's Street appealed to the younger age groups Henry Street's appeal is skewed to the older age cohorts perhaps reflecting the development of George's Street as a destination for social activity. Comparatively shopping centres fare poorly, appealing to around half the amount of people as the top three destinations.
- 8: Approximately 30% of people are spending more on shopping and eating out while only 18% report that they are spending more in the pub. The majority of people do not anticipate spending any more, or importantly any less, in the next 12 months, a sign of confidence. In terms of value for money 30-35% think that eating out and shopping are good value. But the pub fares badly with only 12% seeing it as good value while 42% think it poor or very bad value.
- 9: The bus is the most popular means of getting into the city for shopping accounting for over a third of trips. When all forms of public transport are combined this rises to over 50%. The car accounts for just under a quarter of journeys. Getting into and around the city has become more difficult since 2011. 73% of people currently find it easy to get into the City (rises to 85% for the over 65s) down from 82% in 2011 while 67% find it easy to get around versus 72% in 2011.

- 10: Only half of respondents think that Dublin City Council are doing a good job maintaining the City centre. Although, the relatively high proportion who are neutral (27%) suggests that this may be partially an awareness issue.
- 11: Online penetration rates amongst our survey panel are quite low. Approximately 30% of people never buy Books, Fashion or Personal Electronics online and 62% never buy White Goods online. Only 10% of those surveyed indicated that they frequently bought groceries online (a high volume shopping sector) which compares with 15% for the EU and 30% for the UK¹. However, over half of respondents frequently (up to 3 times a month) do research online before they buy in the physical store.

Further Dissemination

In addition to presenting the findings of the survey to this SPC, the EDO are preparing an article for the next edition of the Dublin Economic Monitor which is being launched on the 7th February. Retail Excellence Ireland have also expressed an interest in publishing the results.

The findings will also be fed back to the senior management of Dublin City Council for their consideration.

The public will be able to access the findings with an Executive Report currently being prepared for the Dublin City Council website and available on request.

If you want your voice to be heard on issues affecting the city you can sign up to the Your Voice Your Dublin survey panel here <http://bit.ly/ydyvreg>

¹ Eurostat