

Your Dublin, Your Voice Build Back Better SPC 10th November 2020



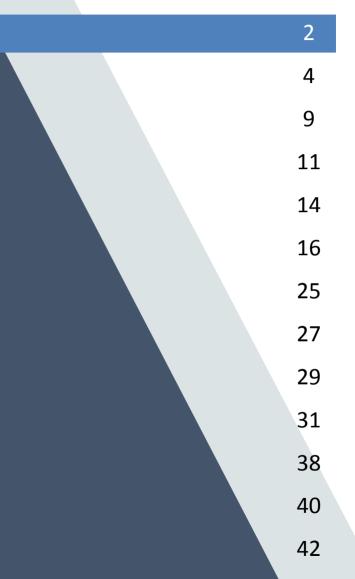
Survey Reference Period: August 2020



www.delve-research.com



Background and Respondent Profile Working Arrangements and Commute **Encouraging Walking and Cycling** Energy Use and Household Activities **Behaviours Since mid-March** Going to the City Centre and Other Behaviours Experience of Nature and Wildlife Would Like to See in Place as We Adapt **Priorities for Retail Businesses Preferred** Initiatives Would Like to See From Business Would Like to See From Local Authority Hopes for Dublin







- Online survey, 13th August - 21st August 2020

- 951 respondents from the "Your Dublin, Your Voice" opinion panel

- Global margin of error +/- 3.2%

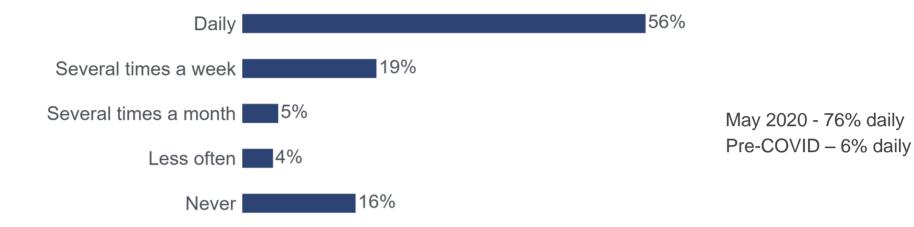
- Robust panel in existence since 2010, recruitment through various channels



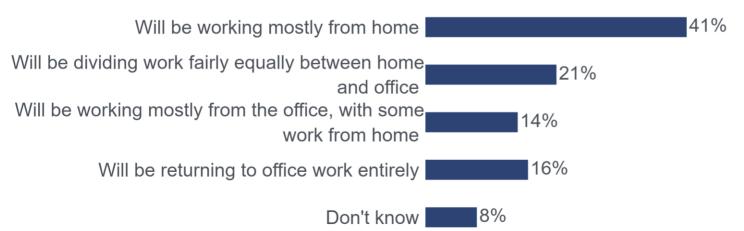
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IX.	Priorities for Retail Businesses
Χ.	Preferred Initiatives
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XIII.	Hopes for Dublin



How frequently do you currently work from home?



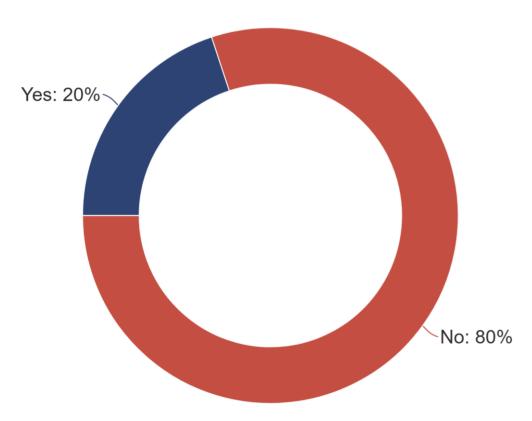
How do you see yourself working in the medium to long term?



sample size: 615



Has your occupation status changed since the implementation of COVID-19 measures in mid-March?

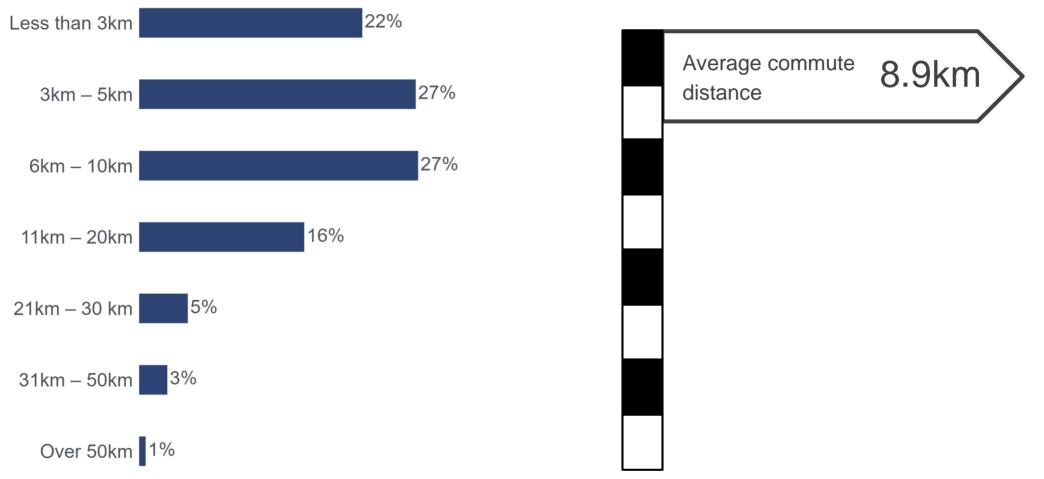


"Yes" was highest among 18 to 34 year-olds at **27%**

Commute Distance

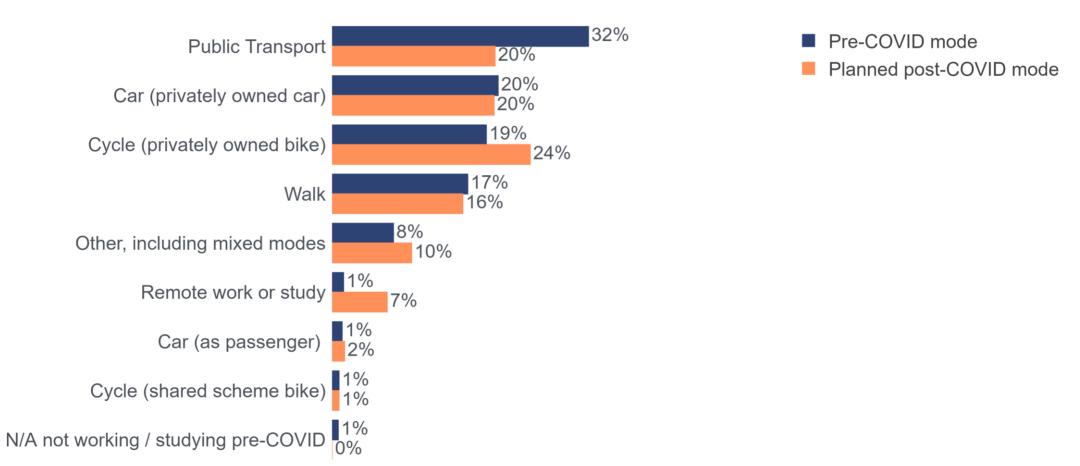


What is the one-way distance of your normal (pre-COVID-19) commute to work or school / college?





Before the COVID-19 restrictions, how did you usually travel to and from work or school / college? How do you plan to travel to and from work (or school / college) once the COVID-19 restrictions are lifted?



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Which of the following would encourage you to walk or cycle, or would make you more comfortable with walking or cycling if you already do? Please select as many as apply.

% selecting

Improved cycle lane network in the city		59%
Less traffic on the roads		46%
Increased / safe cycle parking	36%	
More pedestrianised areas	35%	
Improved and wider footpaths	35%	
Financial incentives for walking and cycling	31%	Cycling a
Improved cycle facilities (e.g. shower areas, lockers)	26%	was grea
Extension of the Cycle to Work scheme	22%	males an
Availability of electric scooters / bikes	16%	group
Cycle training / on-road skills	11%	
Bicycle maintenance class / support	10%	
None of the above	9%	
Bike loan scheme	8%	
Bike buddy programme (support from experienced cyclist)	4%	
I work remotely	4%	
Other (please specify)	11%	

Cycling and pedestrian infrastructure was greatest encouragement to males and the 18 to 34 year-old age group

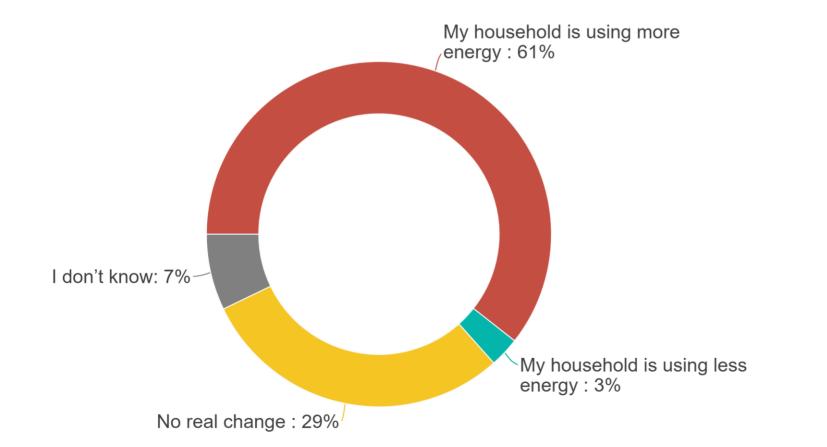


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Which of the following best describes your energy usage in your household during the COVID-19 restrictions?



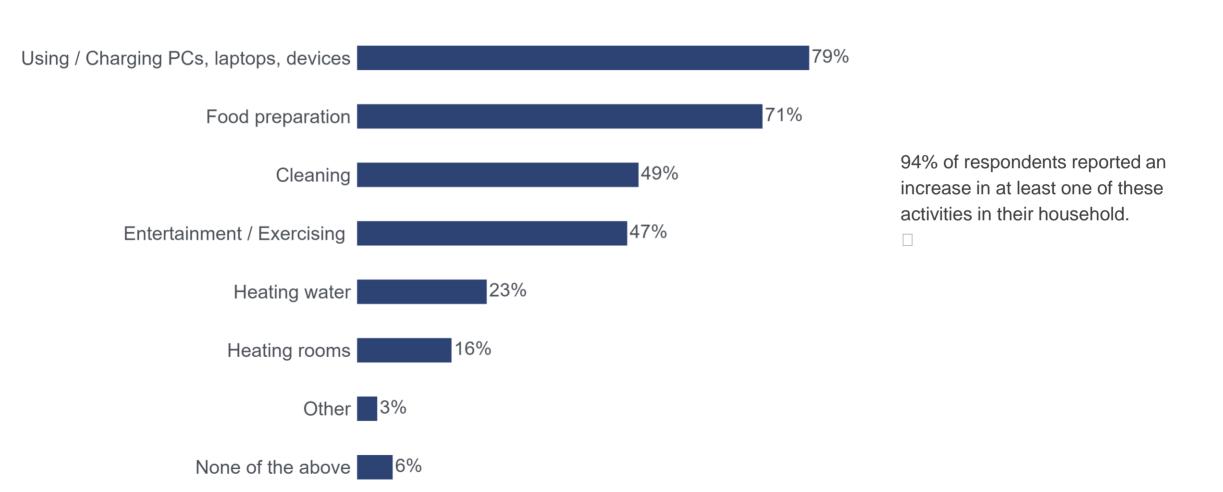
61% reported that their household was using more energy during the COVID-19 restrictions

Household energy use during the restrictions was more likely to be higher than normal among those under 65, among those working, and among those with dependent children in the household



Which of the following activities have increased in your household during the COVID-19 restrictions? Please select as many as apply.

% selecting



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Which of the following statements are true for you since mid-March?



Over 65s were more likely than younger respondents to have started growing their own vegetables, while younger respondents were more likely to be buying more single use plastic.



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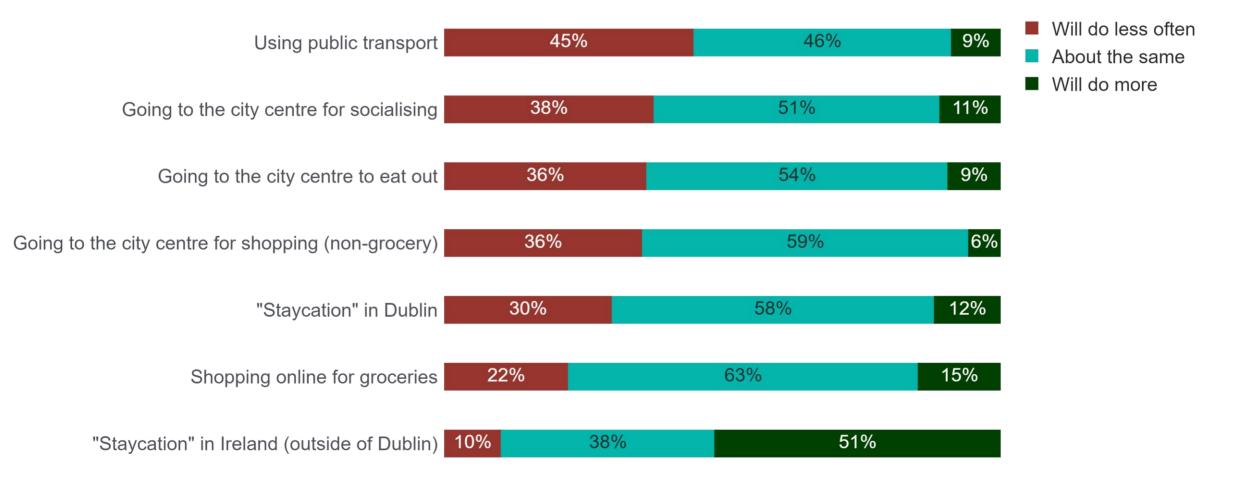


Before the COVID-19 restrictions, how often did you engage in each of the following activities?





Post COVID-19 how do you think you will engage in each of the following compared with pre-COVID?



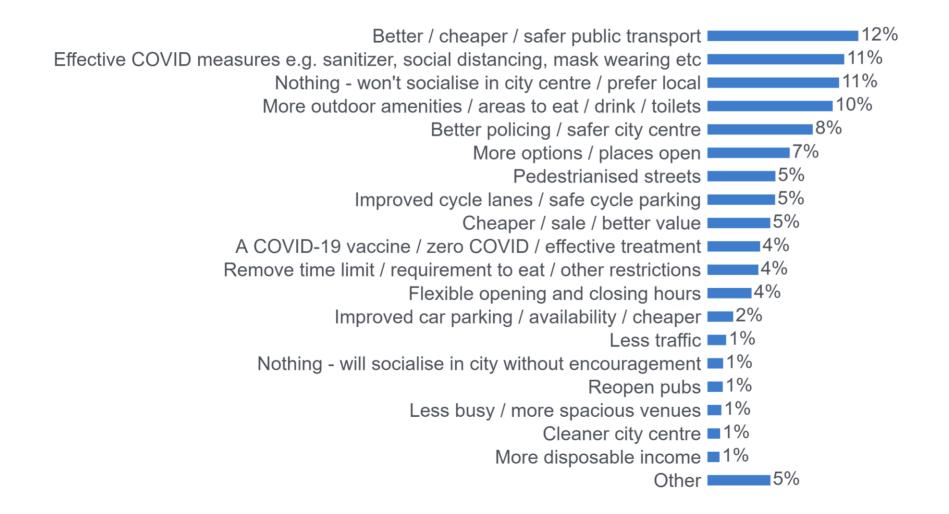


What would encourage you to go to the city centre for (non-grocery) shopping more in a post-COVID world?





What would encourage you to go to the city centre for socialising more in a post-COVID world?





What would encourage you to go to the city centre to Eat Out more in a post-COVID world?

Cheaper food / offers	17%
Effective COVID measure e.g. sanitizer, social distancing, mask wearing etc	13%
More outdoor amenities / areas to eat / drink	12%
Nothing - won't eat out in city centre / prefer local or not at all 9%	
Better / cheaper / safer public transport 8%	
Safer city / less anti social behaviour	
Improved cycle lanes / safe cycle parking 5%	
Improved car parking / availability / cheaper 5%	
Pedestrianised streets	
Remove time limit 3%	
Nothing - will eat out in city anyway 3%	
A COVID-19 vaccine / zero COVID / effective treatment 3%	
Better restaurants / range of options 2%	
More diverse options 2%	
Less traffic 2%	
More disposable income 🗖 1%	
Less or no restrictions / measures 1%	
Friends being available to eat with ■1%	
Other 2%	

Base - those who travelled to

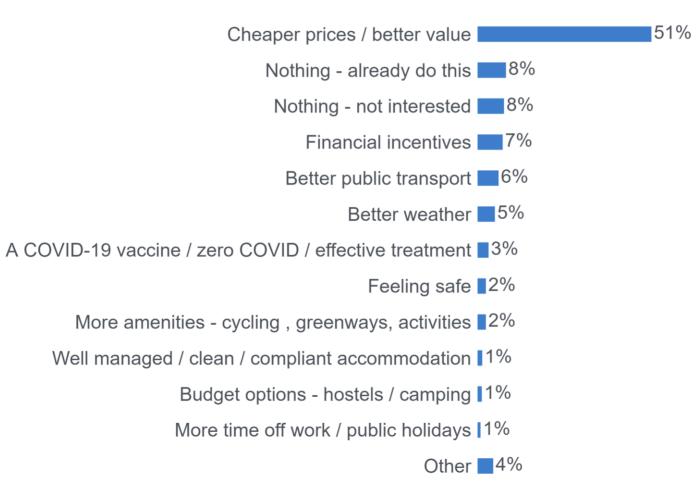


What would encourage you to go to use public transport more in a post-COVID world

work or college using public			
transport pre-COVID but plan to	Mandatory face masks / better face mask compliance		23%
use public transport less	More frequent / more reliable		18%
	Less people / less busy / more space / more public transport		16%
	Nothing- won't use public transport	6%	
	Safer public transport	6%	
More stringent / more co	onfidence in COVID measures e.g. sanitizer, screens, cleaning etc	5%	
	Faster / better service / more connections/ routes	4%	
	Cheaper public transport	3%	
	Nothing - will use public transport anyway	3%	
	A COVID-19 vaccine / zero COVID / effective treatment	3%	
	Less traffic / more bus lanes / prioritise buses	2%	
	Better night services / 24 hour service	2%	
	Prefer to walk or cycle	2%	
	Correct social distancing / behaviour	∎ 1%	
	Cleaner / more comfortable public transport	∎ 1%	
	Other		
	Bike friendly	0%	
	Bus connects	0%	
	Easier payment / contactless / digital (using phone)	0%	
	Less or no restrictions	0%	



What would encourage you to Staycation in Ireland (outside Dublin) more in a post-COVID world





What would encourage you to go to staycation in Dublin more in a post-COVID world





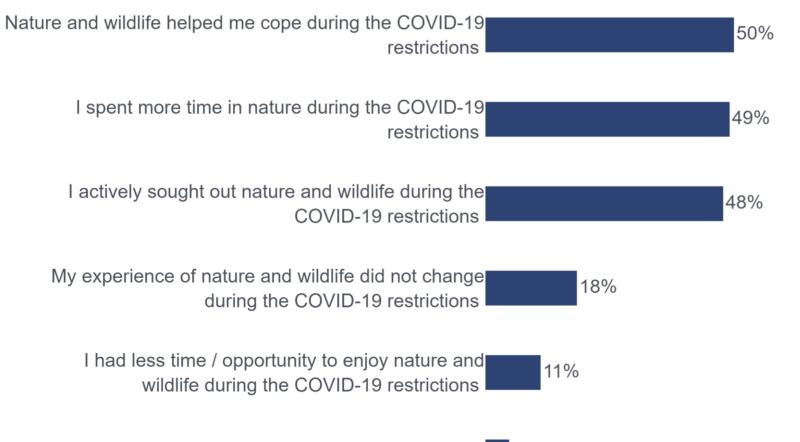


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Which of the following statements describe your experience of nature and wildlife during the COVID-19 Restrictions?

% selecting



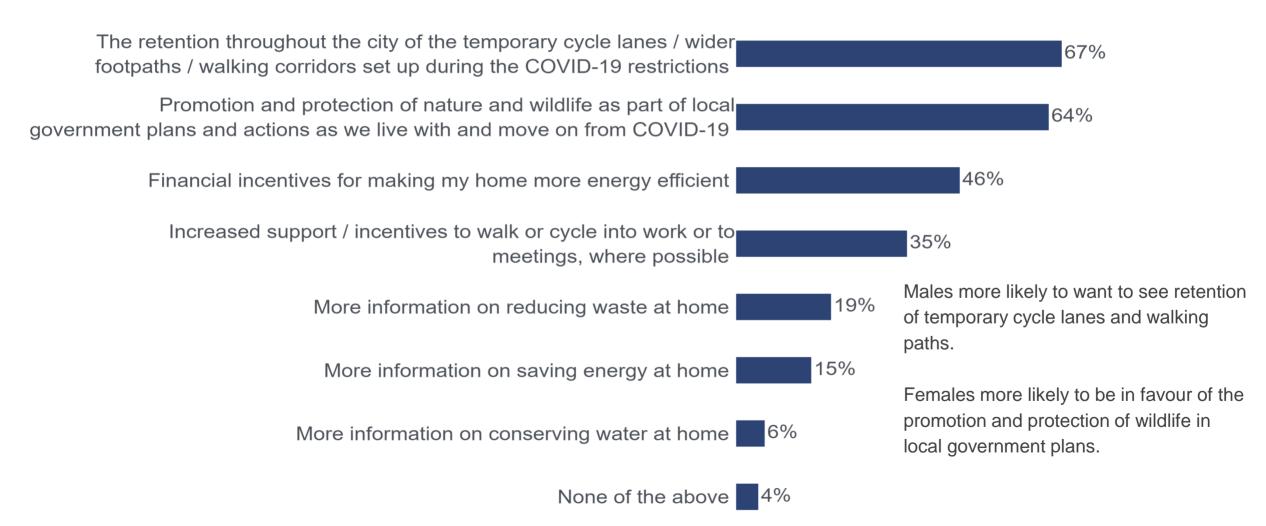




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Which of the following would you like to see in place as we adapt to a 'new normal' following COVID-19?







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Please rank what you think **should** and **will** be the priorities for retail businesses emerging from the pandemic restrictions

Should be:

highest priority

lowest priority

Taking all possible measures to ensure public health
Restoring employment levels to pre-pandemic levels
Returning to business in a more environmentally friendly way
Offering sales / discounts to encourage people back to the shops
Using digital tools to enhance the shopping experience
Returning to pre-pandemic turnover / sales levels as quickly as possible

Will be:

1.	Returning to pre-pandemic turnover / sales levels as quickly as possible
2.	Offering sales / discounts to encourage people back to the shops
3.	Taking all possible measures to ensure public health
4.	Using digital tools to enhance the shopping experience
5.	Restoring employment levels to pre-pandemic levels
6.	Returning to business in a more environmentally friendly way

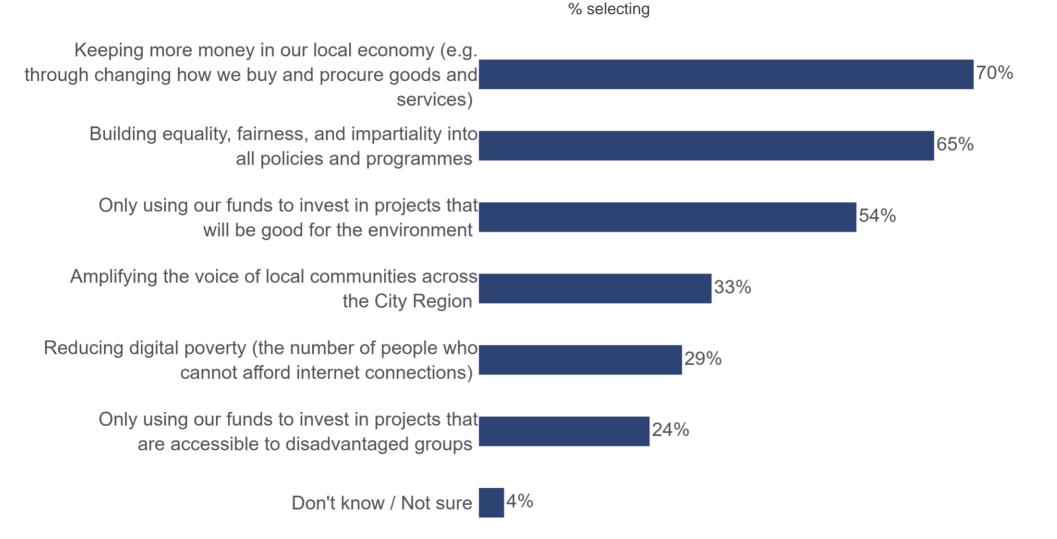




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Please select up to 3 "Build Back Better" initiatives / programmes that you feel are most important for the recovery as we rebuild after the pandemic.





Please select up to 4 Business Ecosystem initiatives / programmes that you feel are most important for our recovery.



Providing incentives to businesses that operate green or pro-environmental practices			64%	
Providing more support for sectors most badly affected by Covid-19 (e.g. the hospitality sector)			62%	
Making sure all businesses can access the finance they need to adapt and grow		5	51%	
Increasing investment in research and development to drive long term growth		49	% Incentivising green practices	
Providing support for start-up businesses		45%	higher priorities for younger respondents.	
Helping businesses become more digitally enabled		40%	Older respondents were more	
Improving how our businesses can work with universities and innovation assets	25%		likely to prioritise finance for start- ups	
Developing better business networks	11%			

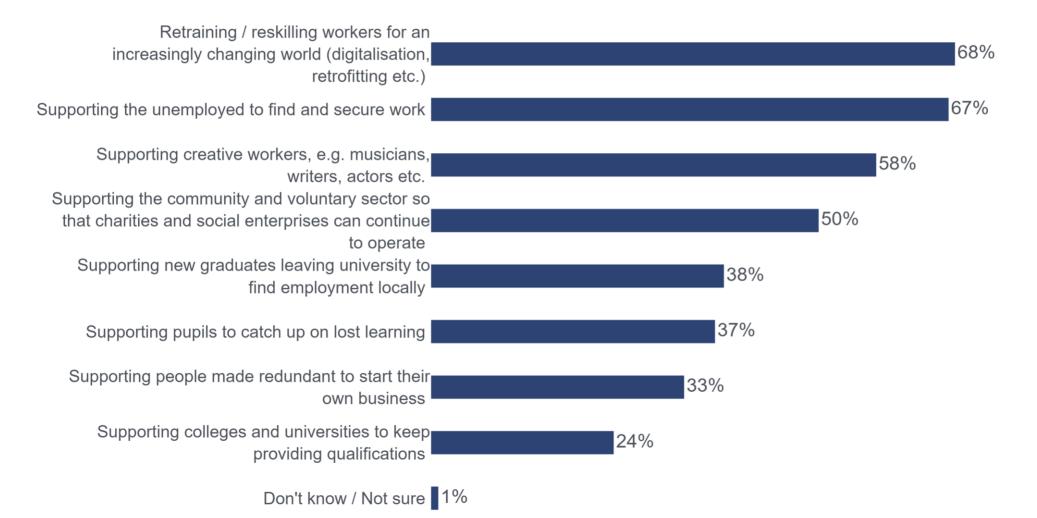


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Please select up to 4 People initiatives / programmes that you feel are most important for our recovery.





sample size: 949



Please select up to 3 Place initiatives / programmes that you feel are most important for our recovery.





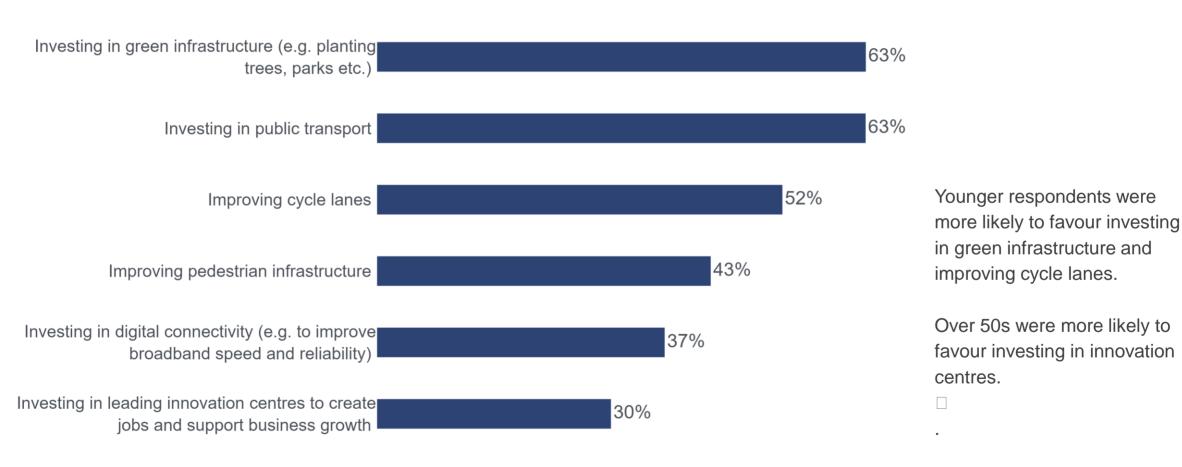
Younger respondents were more likely to favour providing more residential accommodation in the city centre.

Older respondents were more likely to favour supporting the tourism and visitor sector.



Please select up to 3 Infrastructure initiatives / programmes that you feel are most important for our recovery.

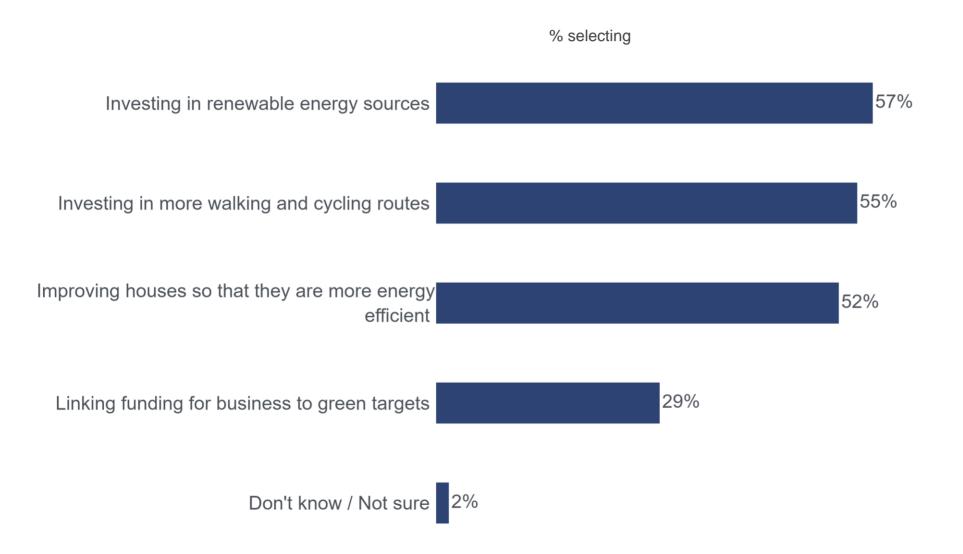
% selecting



sample size: 951



Please select up to 2 Green Recovery initiatives / programmes that you feel are most important for our recovery.





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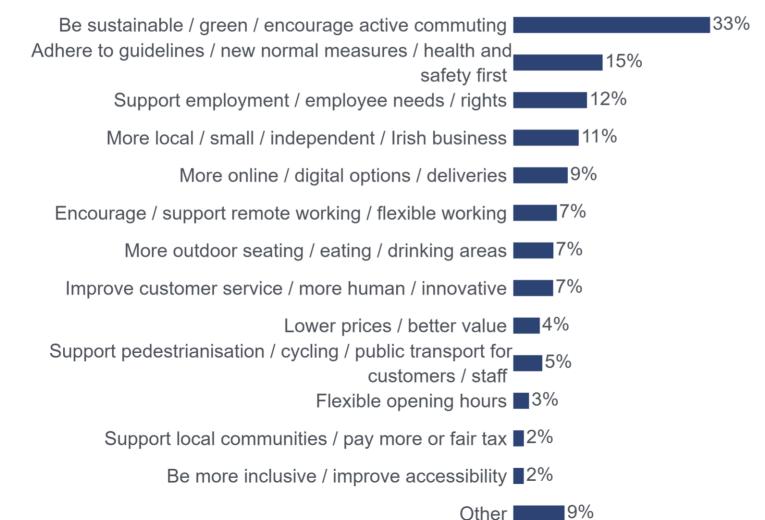
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What would you like to see businesses do more of / do in a new way, as they emerge from the pandemic restrictions?







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What would you like to see your local authority do more of / do in a new way, as communities emerge from the pandemic restrictions?

verbatim comments coded

Improve cycling infrastructure	26%
More outdoor seating / amenities / green spaces	26%
Reduce traffic / promote pedestrianisation	25%
More sustainable / greener / eninvonmental focus	14%
Clean / encourage cleaning/ recycling	13%
Provide more / better housing	10%
Better public transport	10%
Support local business	9%
Support disadvantaged / disabled / elderly / youth	4%
Follow Covid 19 advice / safey	3%
Deal with anti-social behavior	3%
Support community spririt / community groups / initiatives	3%
Improve communication / transparency / listen more	2%
Support the creative industries / arts / culture	2%
Be more caring / considerate / citizen focused	∎1%
Improve / invest in public realm	1%
Invest in digital / tech / broadband infrastructure	1%
Other	9%



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What are your hopes for Dublin as the city emerges from the pandemic restrictions?

verbatim comments coded

It will be a cleaner / greener / sustainable city	25%
Less traffic / more pedestrianisation	22%
More people friendly city / liveable / people first / feel safe	20%
Affordable housing / accommodation / less homeless	16%
Better sense of community / solidarity / friendliness	14%
More cycle friendly	13%
More green areas / public spaces/ amenities / outdoor seating	12%
Vibrant economy/ city returns / comes back stronger	10%
More culture/ arts/ entertainment / nightlife options in city	10%
Improve public transport	8%
More support for local economy / small business	5%
Back to normal / new normal	4%
Promote tourism	3%
Respond to anti social behavior / police streets / safer city	3%
Encourage remote working	2%
Covid 19 measures followed	2%
That businesses / employment are preserved	∎1%
People / government will learn from the experience	∎1%
Nothing / none	∎1%
Other	7%



END

For further information please contact:

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