Retail and Hospitality

Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

YOUR DUBLIN YOUR VOICE
DUBLIN OPINION PANEL

Economic Development Office
Dublin City Council

Report Date: 05/01/2023
Survey Fieldwork: November 2022

Report by: Delve Research
Survey Research & Analysis

Agenda

Background to this survey

- Online survey, 16th - 27th November 2022

- 1,036 respondents from the "Your Dublin, Your Voice" opinion panel

- 21% response rate

- Global margin of error +/- 3%

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

Respondent Profile

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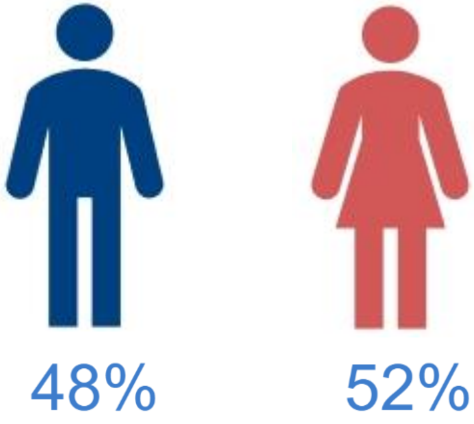
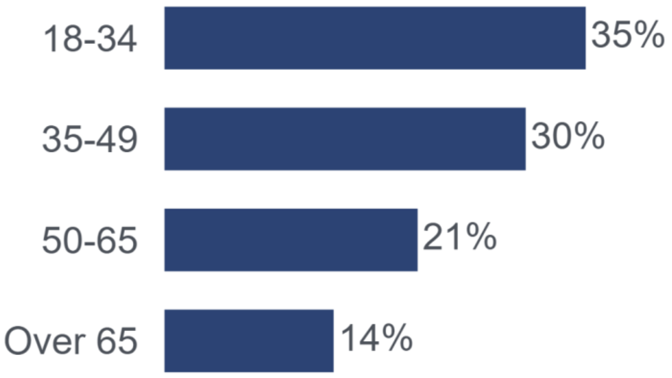
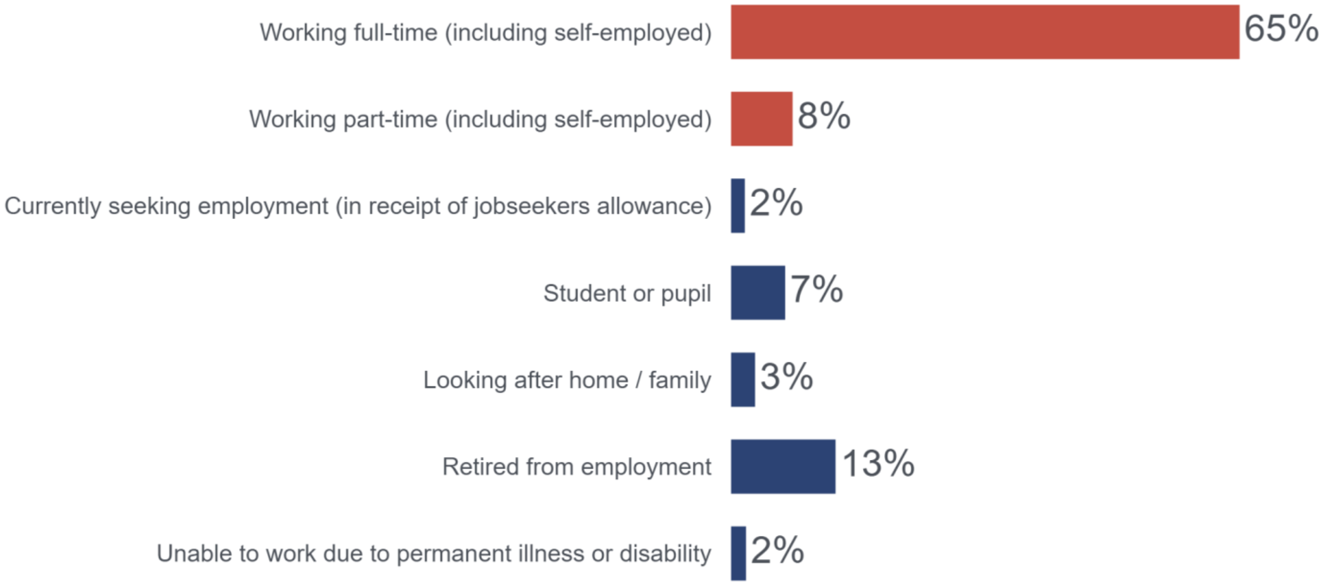


Age Group



24% with dependent children in household

Employment Status



Respondent Profile

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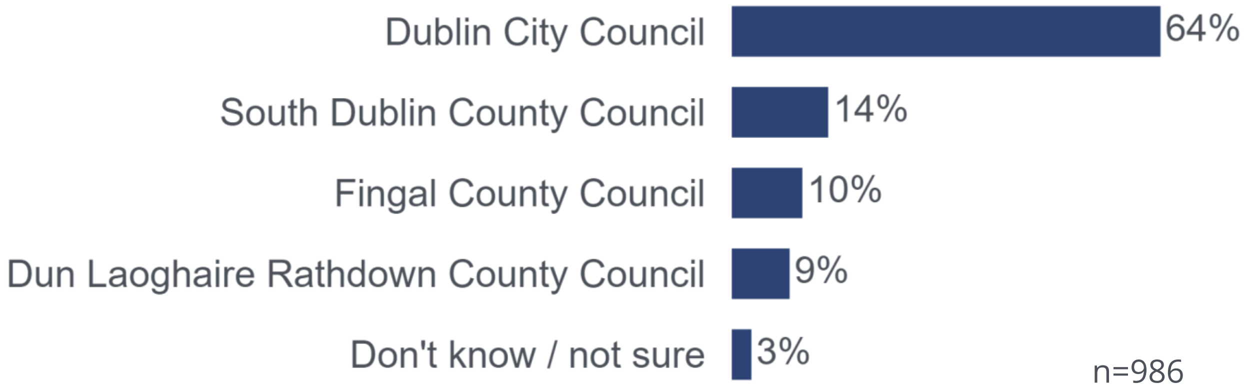
39 nationalities represented on this survey, 88% Irish

Local Authority



n=986

Current Area of Residence

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

Respondent Profile

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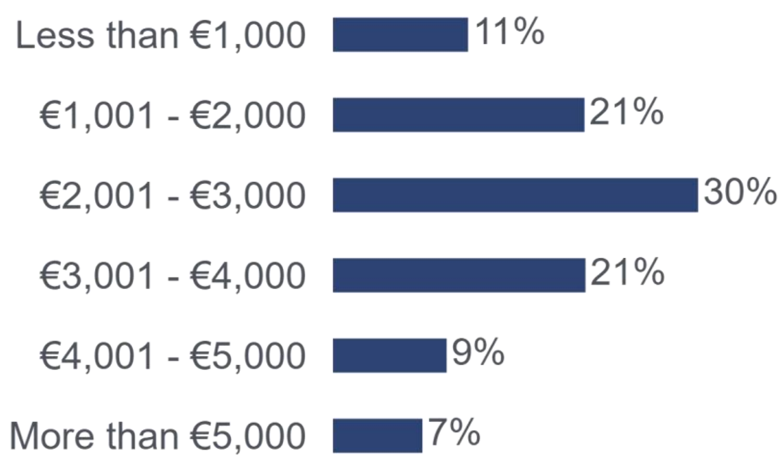
Monthly Income After Taxes, Before Bills



Monthly Disposable Income After Bills Are Paid

Agenda

Life Satisfaction

- **6.7 out of 10** is the average life satisfaction score among respondents. This is down from 6.8 measured in August 2022. Life satisfaction Life satisfaction is **highest among over 65s** (7.4 out of 10). Life Satisfaction increases with educational achievement and is higher among those with higher incomes.

Engaging in Shopping and Socialising

- 95% of respondents shop (other than for groceries) in a physical shop in the city or Dublin region; 89% dine / eat out in the city or region; 72% go to the pub in the city or region.

- Frequency of shopping in physical stores for clothes / fashion and books has declined since 2018.

Perceptions and Sentiment – Shopping and Socialising in Dublin

- Agreement has declined since 2018 with statements “I like to go out and socialise in Dublin” (81% agreed in 2018, 69% agree in 2022), “I enjoy shopping in Dublin” (74% agreed in 2018, 59% agree in 2022), “Dublin has a vibrant city centre” (89% agreed in 2018, 54% agree in 2022) and “Shopping in Dublin city centre is a pleasant experience” (71% agreed in 2018, 41% agree in 2022).

Selection, Supporting and Getting Around

- Agreement has declined since 2018 with statements "Dublin has a good range of high quality restaurants" (93% agreed in 2018, 85% agree in 2022) and "Dublin has a wide selection of unique shops and independent retailers" (70% agreed in 2018, 50% agree in 2022). Agreement has increased with the statement "I make a conscious effort to support local shops in my neighbourhood" (68% agreed in 2018, 76% agree in 2022).

- Ease of identifying shopping areas and ease of getting around the city centre while shopping has not changed significantly.

Overall Rating of Shopping and Leisure in Dublin

- The overall rating of dining / eating out, going to the pub, and shopping (other than for groceries) has declined since 2018.

Impact of Pandemic on Shopping and Socialising in Dublin City

- 42% of respondents felt that shopping and socialising in Dublin City has changed for the worse as a result of COVID-19. These cited business closures and more anti-social behaviour on the streets among the main reason for this.

- 23% of respondents felt that shopping and socialising in Dublin City has changed for the better as a result of COVID-19. These cited increases in outdoor seating / dining areas and pedestrianisation among the main reasons for this.

Feeling Safe in the City Centre

- **61%** of respondents indicated that they **feel safe in Dublin city centre during the day**, down from 72% in 2018.
- **24%** of respondents indicated that they **feel safe in Dublin city centre at night**, down from 38% in 2018.
- Female respondents and older respondents were less likely than others to feel safe in the city centre.

Engaging in Online Shopping

- **65%** of respondents **buy meals online to eat at home** at least occasionally, up from 57% in 2018.
- **31% buy groceries online**, up from 26% in 2018.
- **61% buy books online**, down from 70% in 2018.
- **47% buy personal electronics online**, down from 68% in 2018.
- **Browsing for information before shopping in a physical store** (90%) and **buying clothes / fashion online** (65%) have not changed significantly since 2018.
- **13%** of respondents indicated that they **buy alcohol online** at least occasionally (not asked in 2018).

Division of Spend

- 42% of clothes / fashion spend is in the city centre, 29% outside the city centre, and 29% online
- 54% of pub spend among respondents is in the city centre
- 57% of eating out spend is in the city centre
- 20% of household durable spend is in the city centre, 59% outside the city centre, and 21% online
- 28% of personal electronics spend is in the city centre, 34% outside the city centre, and 38% online
- 42% of spend on books is in the city centre, 22% outside the city centre, and 36% online

- Across all categories, older respondents had a higher proportion of their spend outside the city centre.

Appeal of Areas

- **Grafton Street and environs** remains the most appealing area for shopping and socialising, appealing to 79% of respondents. This is followed by **Dame St / Camden St / Wexford St / South Great George's Street** (65%), **Henry Street and environs** (49%) and **Capel Street** (46%).

- Since 2011 there has been a decline in the appeal of suburban shopping centres.

Factors Influencing Where You Shop

- The top 4 most important factors influencing where people shop in physical stores in Dublin are:

    1. Good choice of shops / range of stores
    2. Pedestrianised streets / attractive environment
    3. Good prices / good value for money
    4. Good / cheap public transport

- Other factors influencing where people shop include safety, range of unique and independent shops, and accessibility.

Use of Technology and Loyalty Mechanisms

- **49%** of respondents indicated that they have used a **mobile phone payment service** to pay for shopping, up from 14% in 2018.
- **91%** pay by **tapping with card**, up from 81% in 2018.
- **54%** use a **store loyalty card**, down from 63% in 2018.
- **41%** use **shopping vouchers**, down from 63% in 2018.
- **39% pre-order online then collect in person**, 23% receive retailer emails to alert them to offers and 4% use technology (e.g. sizing app) to help select something. These are similar to the figures observed in 2018.

Summary of Results

Current Spend

- 36% feel they are spending more now on **shopping** (other than groceries) than 12 months ago, while 28% feel they are spending less now –> **8% net positive**
- 46% feel they are spending more now on **going to the pub** than 12 months ago, while 29% feel they are spending less now –> **17% net positive**
- 48% feel they are spending more now **dining / eating out** than 12 months ago, while 25% feel they are spending less now –> **23% net positive**

Anticipated Spend

- 21% anticipate spending more on **shopping** (other than groceries) in the next 12 months, while 34% anticipate spending less –> **13% net negative**
- 18% anticipate spending more on **going to the pub** in the next 12 months, while 34% anticipate spending less –> **16% net negative**
- 22% anticipate spending more on **dining / eating out** in the next 12 months, while 32% anticipate spending less –> **10% net negative**

Value for Money in Dublin

- **17%** of respondents felt that **shopping** (other than for groceries) **is good or great value in Dublin**, down from 34% in 2018.

- **11%** of respondents felt that **going to the pub is good or great value in Dublin**, in line with 12% in 2018.

- **19%** of respondents felt that **dining / eating out is good or great value in Dublin**, down from 30% in 2018.

Improving the Overall Shopping Experience in Dublin

The most common suggestions for improving the overall shopping experience in Dublin related to:

- More pedestrian friendly / less traffic (22% of suggestions)
- Improve safety (19%)
- Cleaner city centre / revamp areas (especially O'Connell Street) (10%)

5% of suggestions related to cheaper / free or better car parking, down from 18% in 2011.

Mode of Getting in to the City Centre

- **26%** of **workers / students** get in to the city centre for **work or study by bus**
- **36%** of respondents use the **bus** to get into the city centre for **shopping**.
- **23%** of **workers / students** get into the city centre **on foot**, up from 16% in 2018.
- **17%** of respondents get into the city centre for **shopping on foot**, up from 10% in 2018.
- **13%** of **workers / students** get into the city centre by **car**, down from 18% in 2018.
- **18%** of respondents get into the city centre for **shopping by car**, down from 24% in 2018.

Ease of Getting in to and Around the City Centre

- **71%** find it **easy to get in** to Dublin city centre, down from 73% in 2018 and 85% in 2011.
- **64%** find it **easy to get around** Dublin city centre, down from 67% in 2018 and 72% in 2011.
- **26%** agree that “Dublin City Council does a good job of maintaining a pleasant city centre” – down from 49% in 2018.

Making Dublin City Centre More Attractive for Shopping and Socialising

The top 4 suggestions for making Dublin city centre more attractive for shopping and socialising were:

1. Improve sense of **safety** / increase Garda presence (25% of suggestions)
2. **Cleaner city centre** / revamp areas (especially O'Connell Street) (21% of suggestions)
3. **Pedestrianisation** / less traffic (18% of suggestions)
4. Improve **amenities** (seating / parks / toilets) (10% of suggestions

Circular Economy

In the past 12 months:

- 62% had paid extra for a more durable product
- 60% had repaired an item instead of replacing it
- 57% had reduced the amount of new products they buy
- 53% had bought more locally produced goods
- 51% had chosen brands with sustainable practices / values
- 50% had bought second-hand / refurbished items

- 96% had engaged in any circular economy behaviour

Extending Pub / Nightclub Opening Hours

- **58%** of indicated **support** for proposed legislation to extend the opening hours of pubs and nightclubs.

- Support is higher among males (67% support) than among females (50% support).

- Support is higher among 18 to 34 year-olds (81% support) and lower among over 65s (21% support).

- Reasons for opposing the move to extend opening hours included:

    - Concern about increased alcohol / drug consumption
    - Concern about increase in antisocial behaviour / crime

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Life Satisfaction

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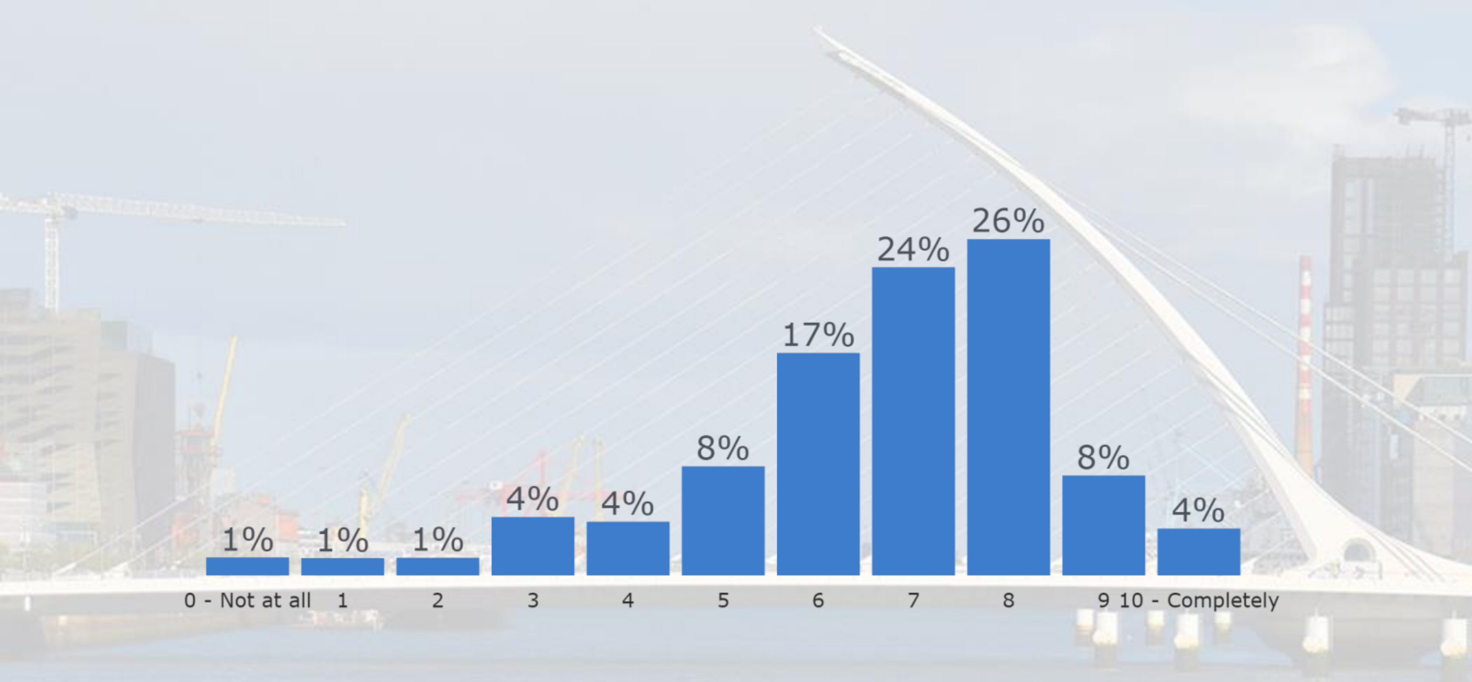
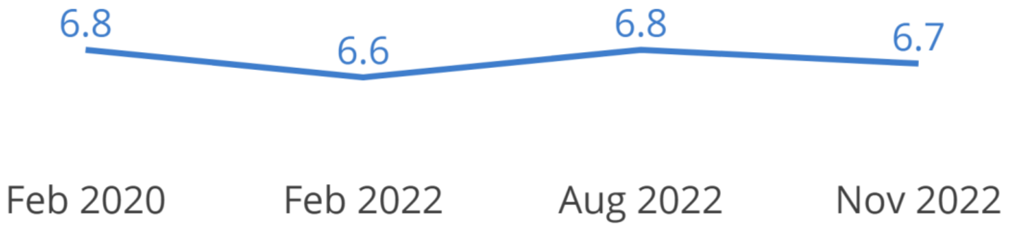
On a scale of 0 to 10, overall how satisfied are you with your life nowadays?





6.7

is the average life satisfaction score out of 10.

This is down from 6.8 measured in August 2022.

Life satisfaction is highest among over 65s (7.4 out of 10).

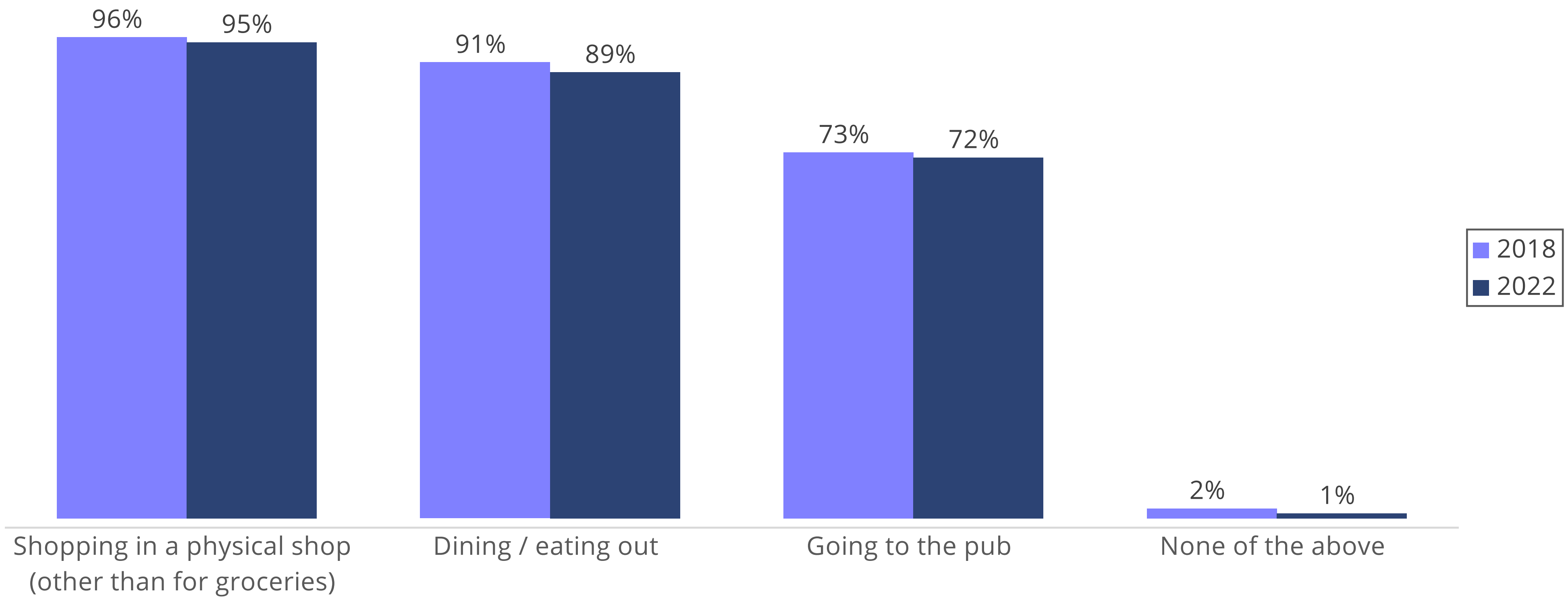
Life Satisfaction increases with educational achievement and is higher among those with higher incomes.

Base: 1036

Agenda

Engaging in Shopping and Socialising in Dublin - Trend

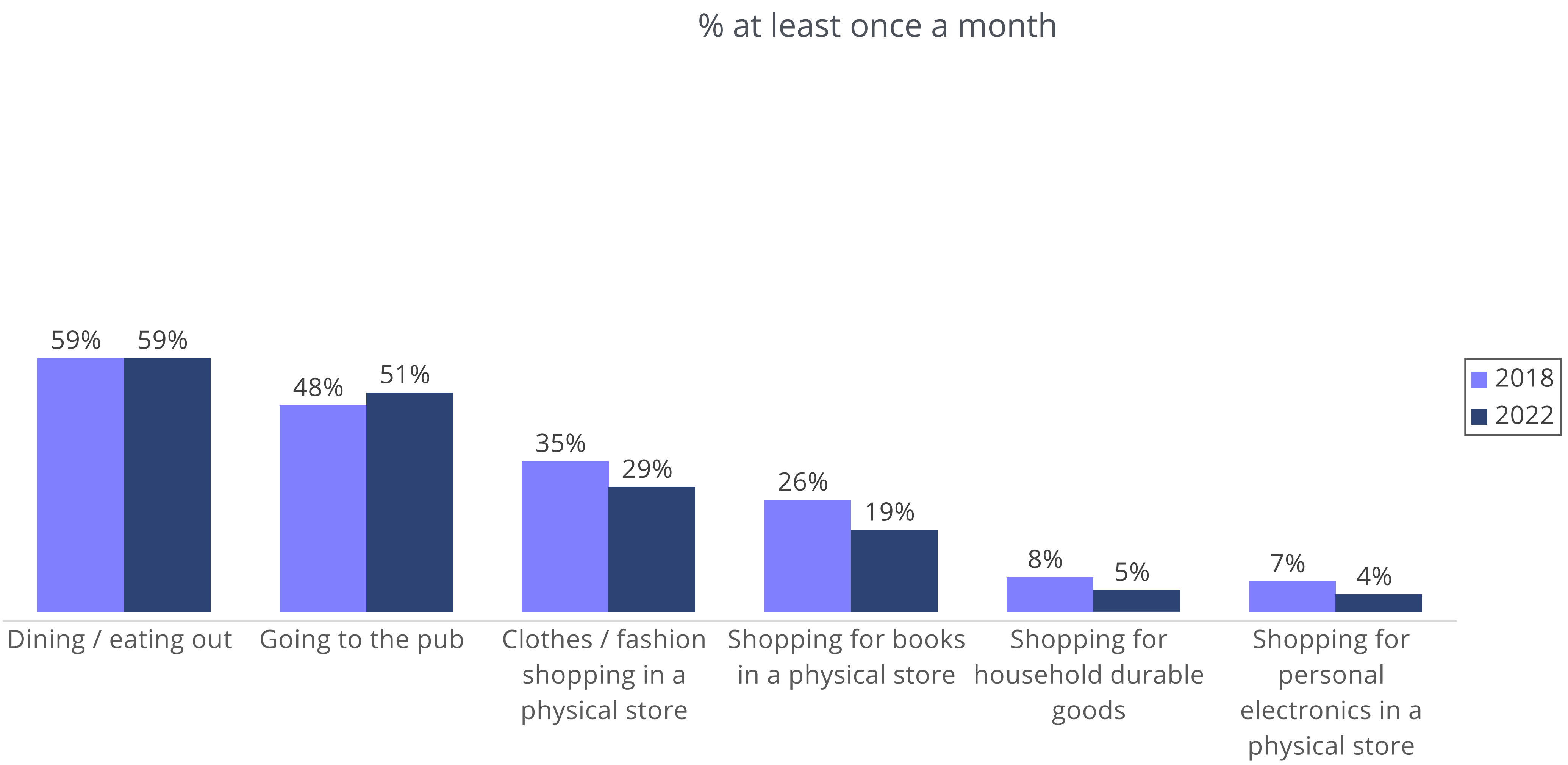
Do you ever do any of the following in Dublin City or in the Dublin region? Please select as many as apply.
% selecting activity



"Going to the pub" is higher among males, among younger respondents, and among those with higher monthly income.

Base: 2018=844
2022=1036

Frequency of Engaging in Shopping and Socialising - Trend



“Dining / eating out” and “Going to the pub” are more frequent among younger respondents and among those with higher monthly income.

Base: 2018=844
2022=1036

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Perceptions and Sentiment - Shopping and Socialising in Dublin - Trend

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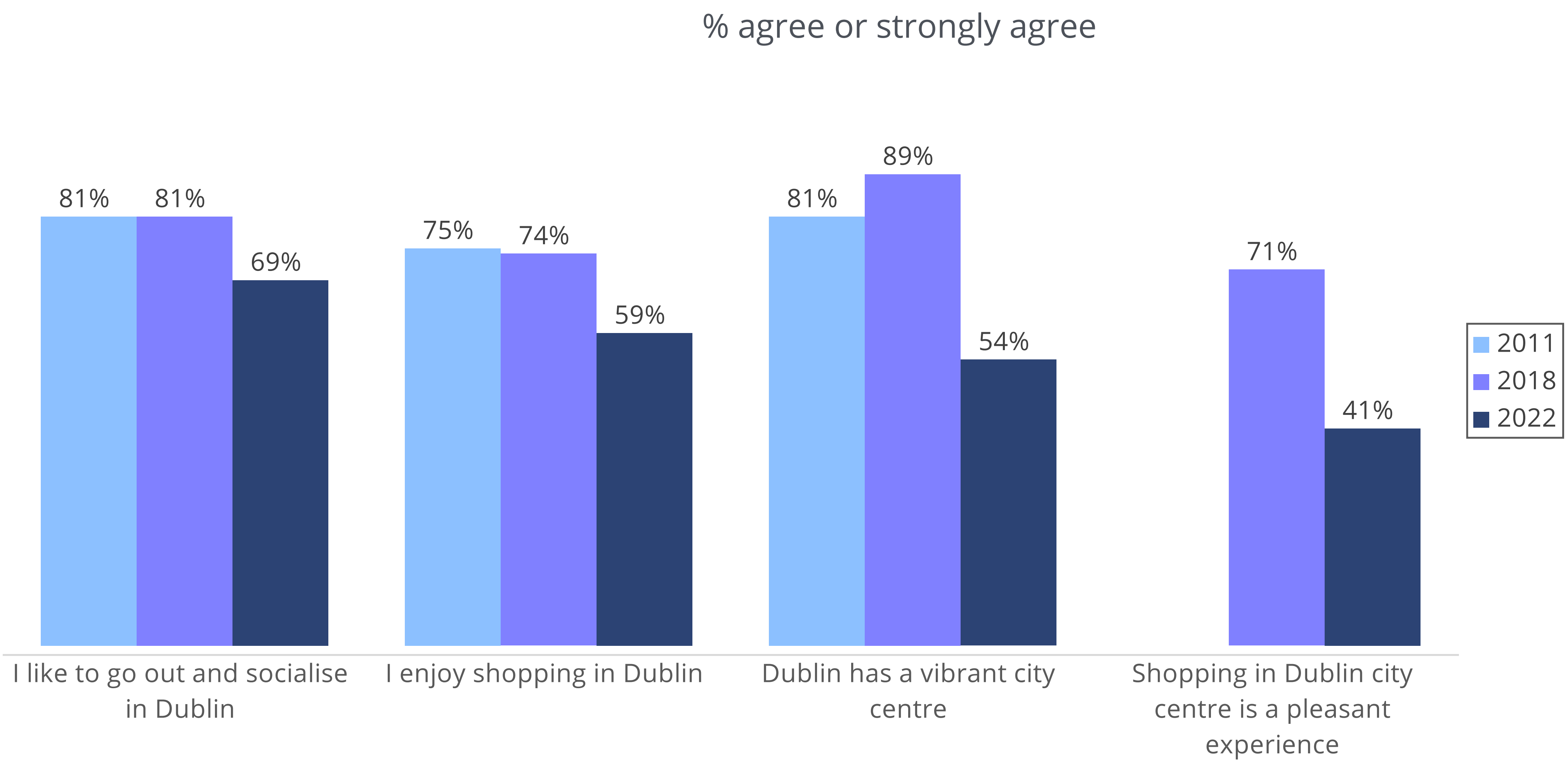

"I like to go out and socialise in Dublin" is higher among younger respondents and among those with higher monthly income.

Base: 2011=1907
2018=844
2022=1036

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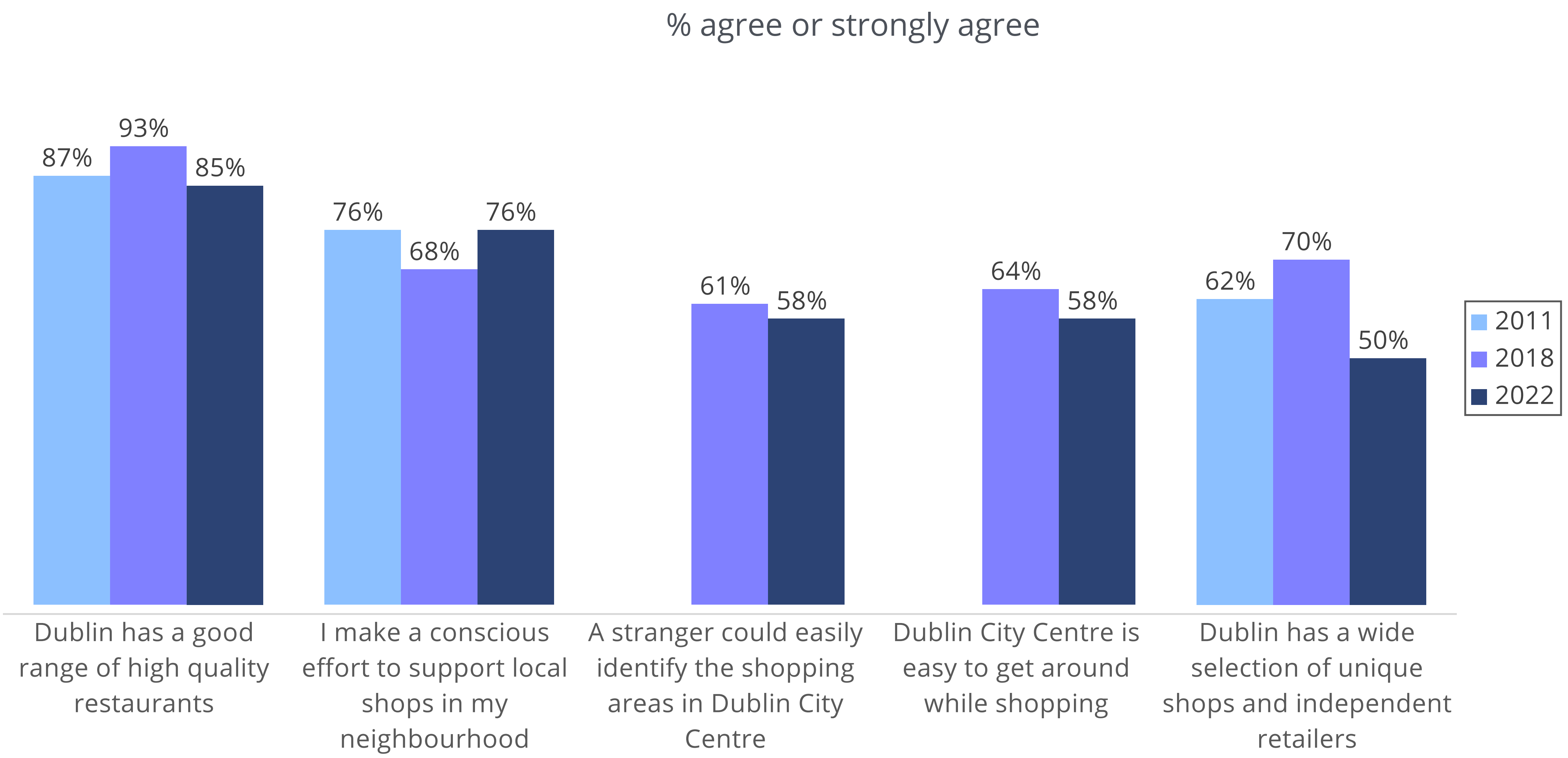
Selection, Supporting and Getting Around - Trend



Supporting local shops rises to 85% among over 65s.

Base: 2011=1907
2018=844
2022=1036

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Overall Rating of Shopping and Leisure in Dublin - Trend

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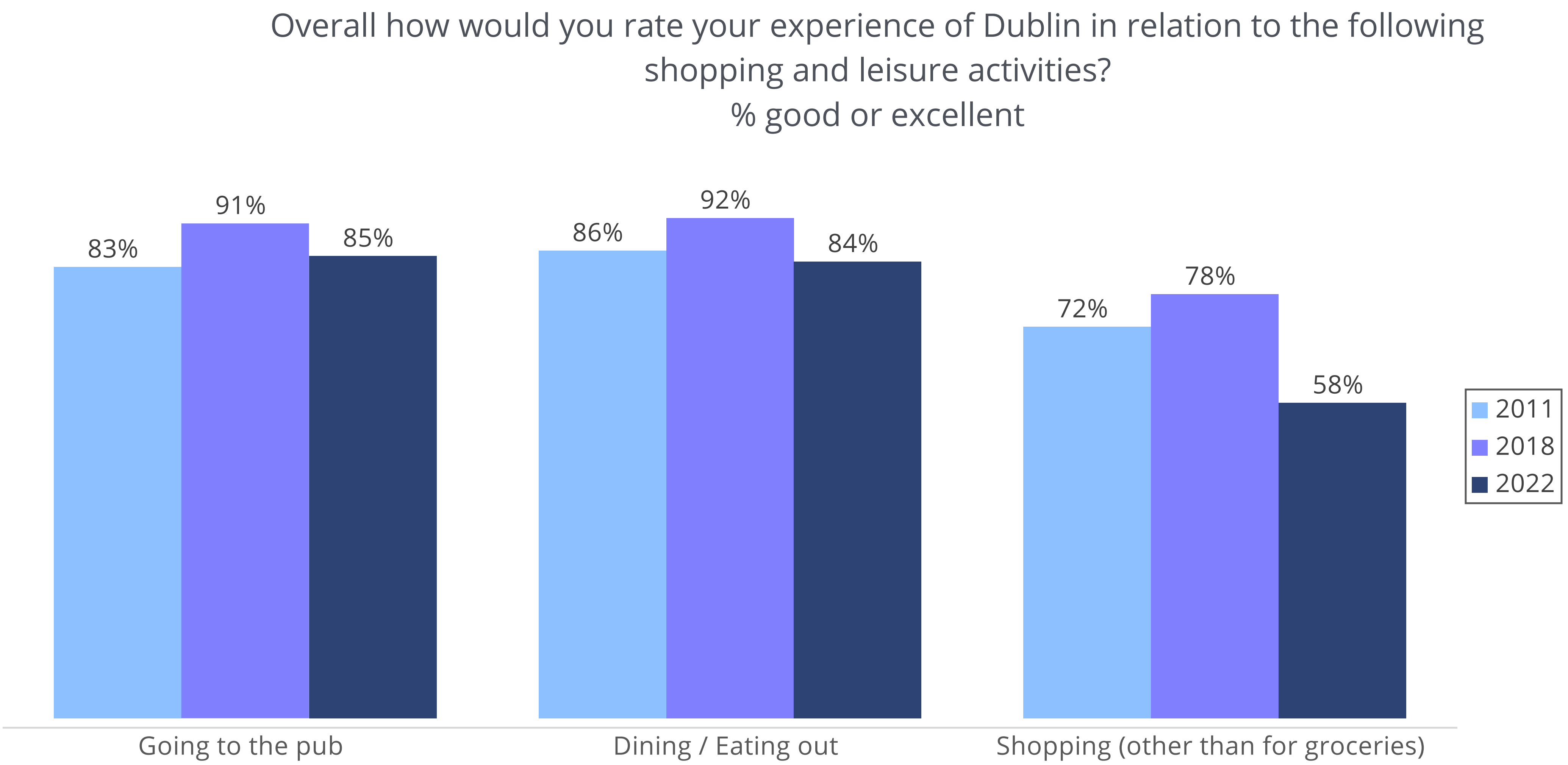

"Going to the pub" and "Dining / eating out" are rated lower by over 65s.
Over 65s rate "Shopping" higher than younger age groups.

Base: 2011=1907
2018=844
2022=1036

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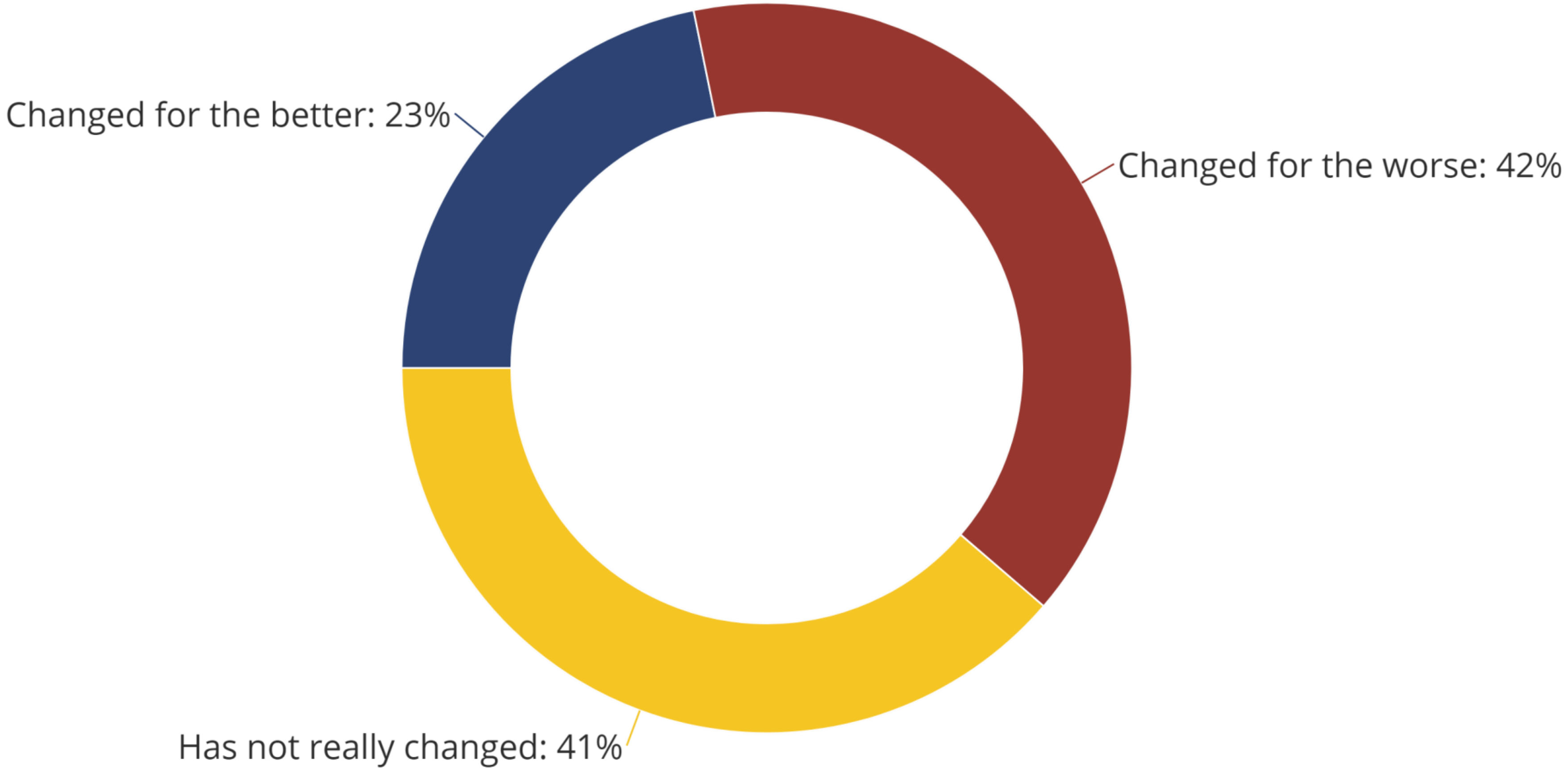
Impact of Pandemic on Shopping and Socialising in Dublin City

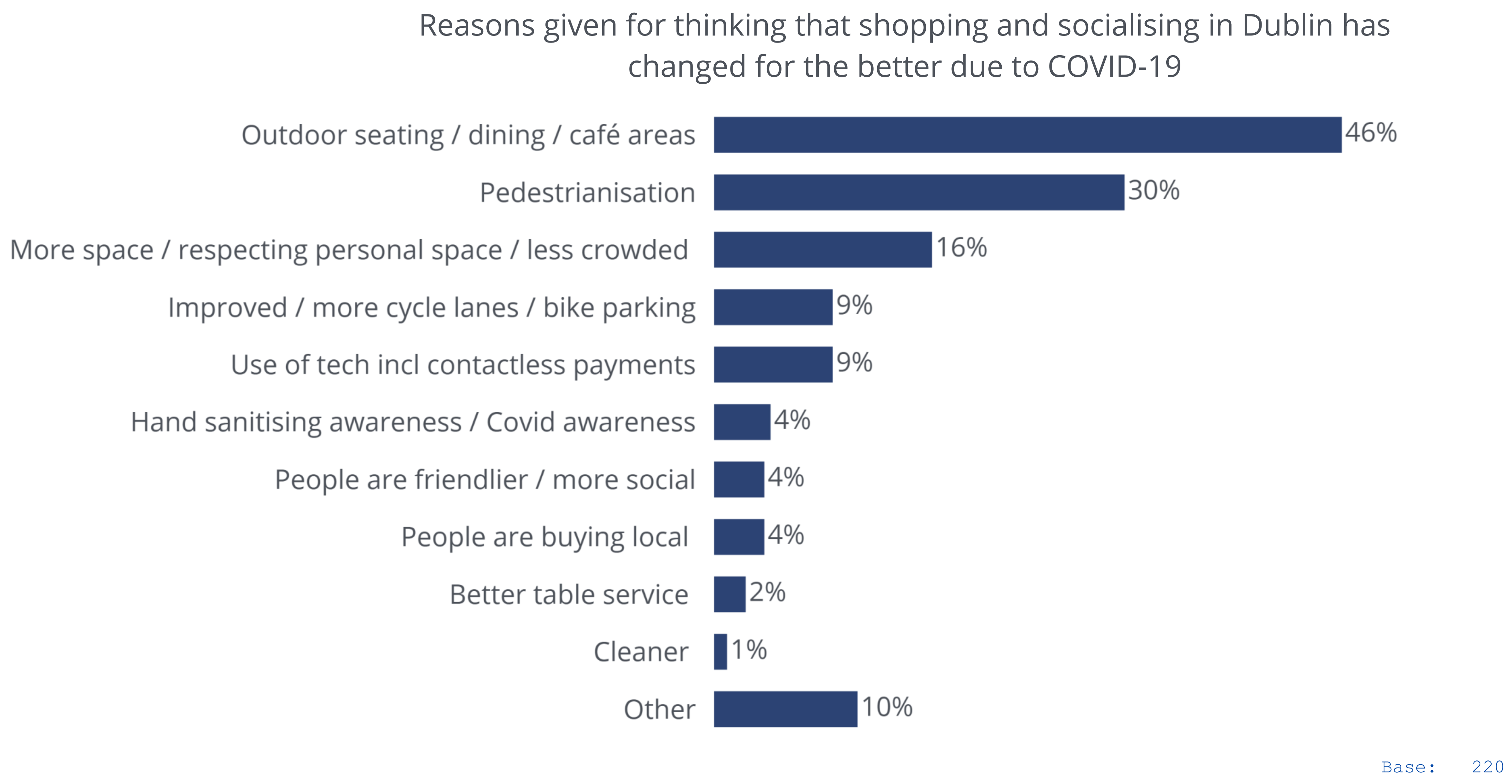
Do you think that shopping and socialising in Dublin city has changed as a result of COVID-19?*



Base: 1015

*totals to more than 100% as respondents could choose more than one option

Reasons Changed for the Better



Reasons Changed for the Worse

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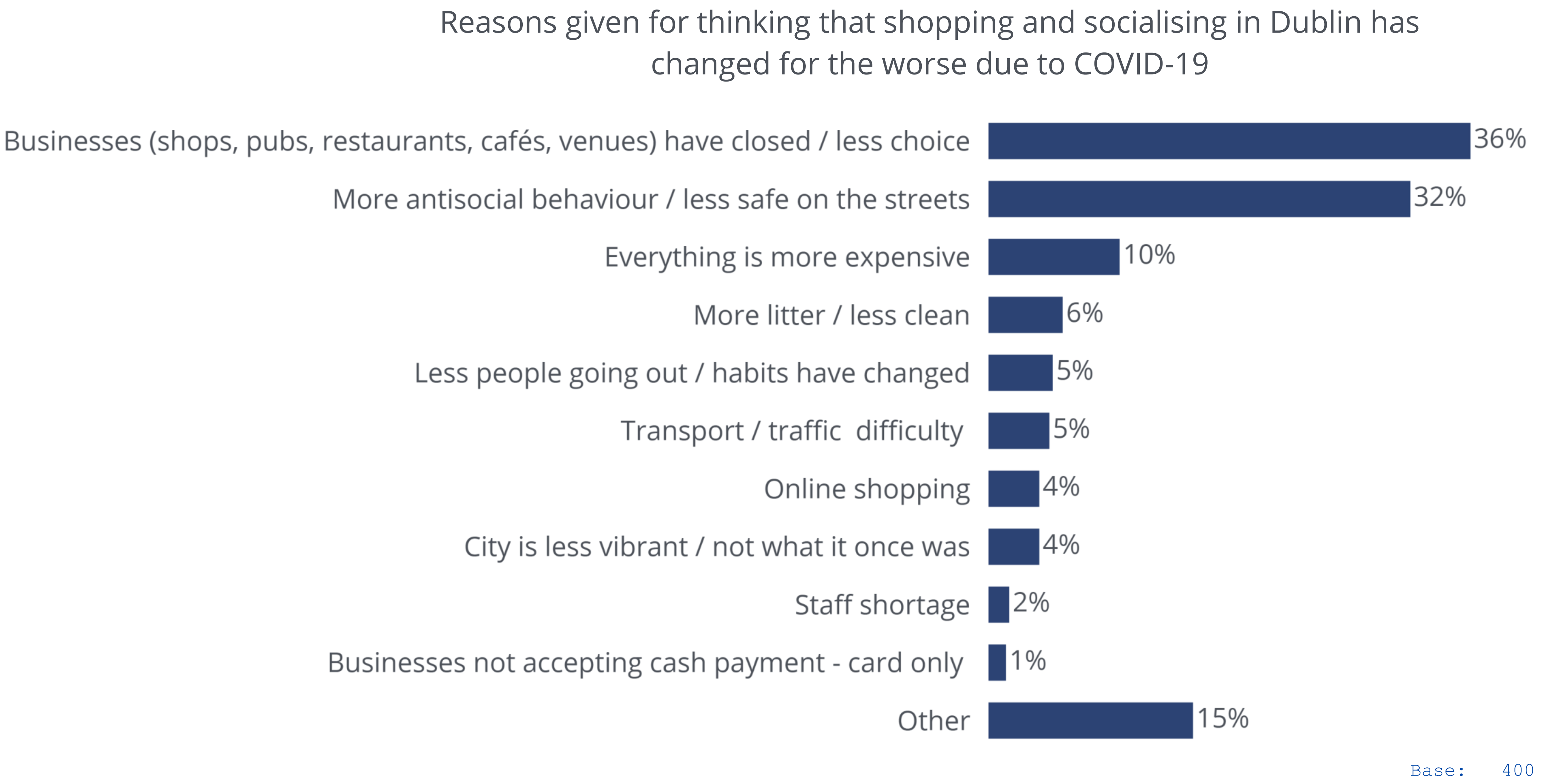

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Feeling Safe in the City Centre - Trend

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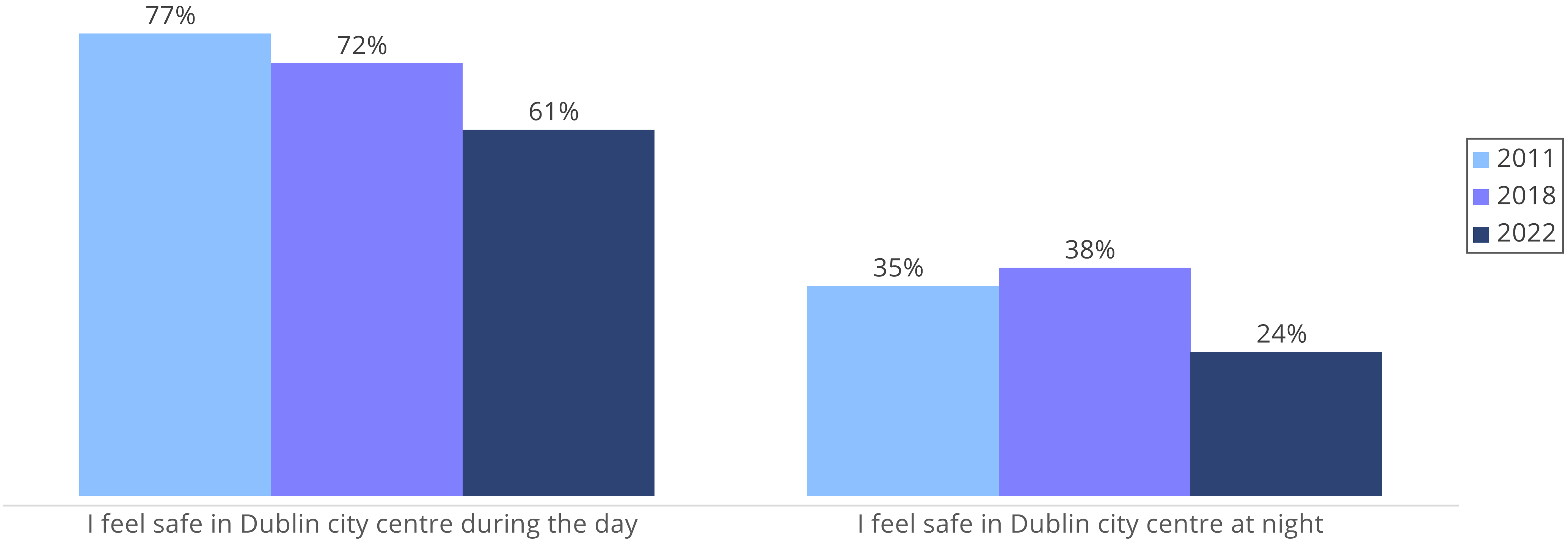
Thinking about shopping (excluding groceries) and leisure in general please indicate your level of agreement with each of the following statements:
% agree or strongly agree



Females and older respondents are less likely than others to feel safe in the city centre.

Base: 2011=1907
2018=844
2022=1036

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Frequency of Engaging in Online Shopping - Trend

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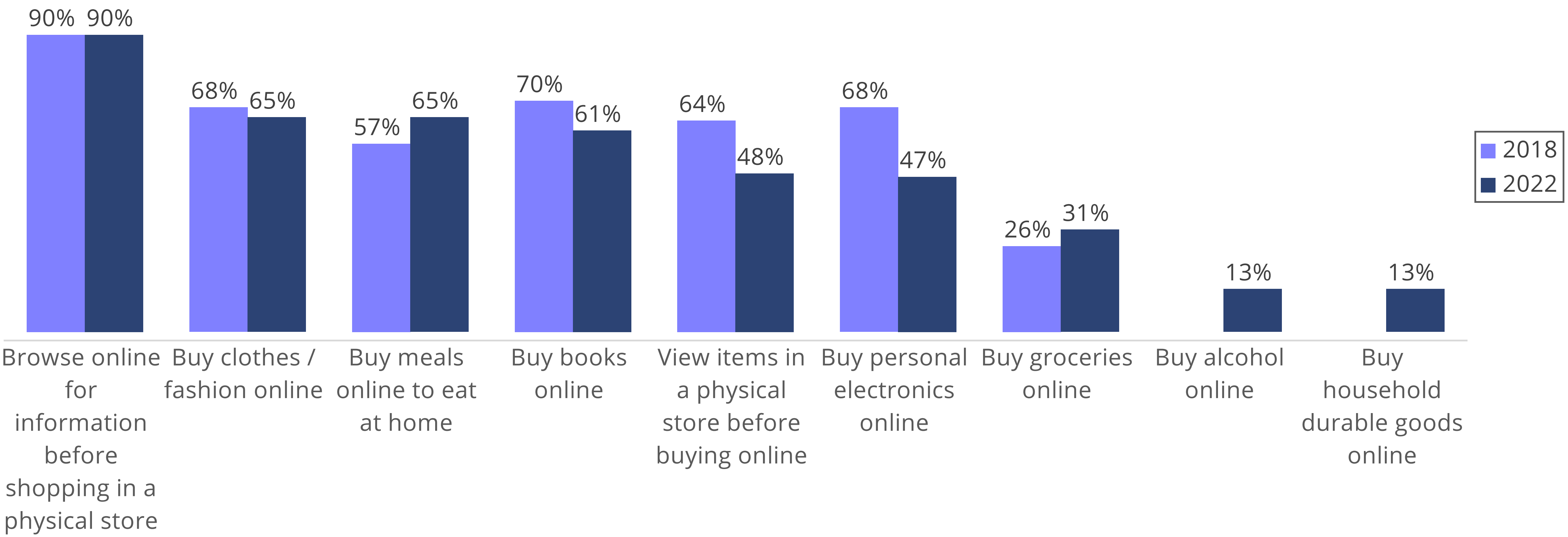
How often do you do any of the following?
% at least occasionally



18-34 your-olds were more likely to engage more frequently in online shopping activities.

Base: 2018=844
2022=1036

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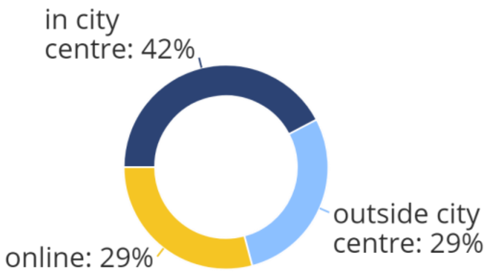
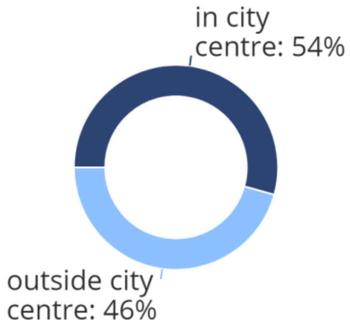
Division of Spend - City Centre / Suburbs / Online

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

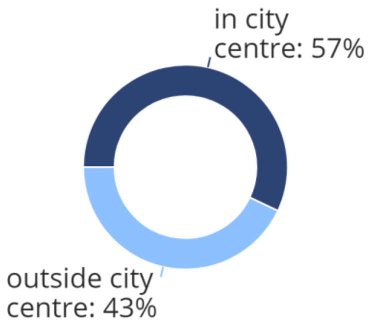
clothes / fashion



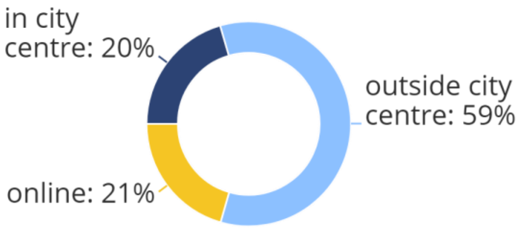
going to the pub



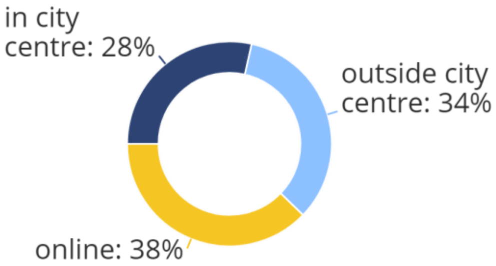
eating out



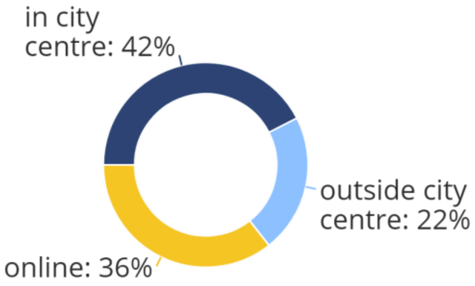
houshold durables



personal electronics



books



Base: 1036

Older respondents had a higher proportion of spend outside the city centre than younger respondents.

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Appeal of Areas in Dublin - Trend

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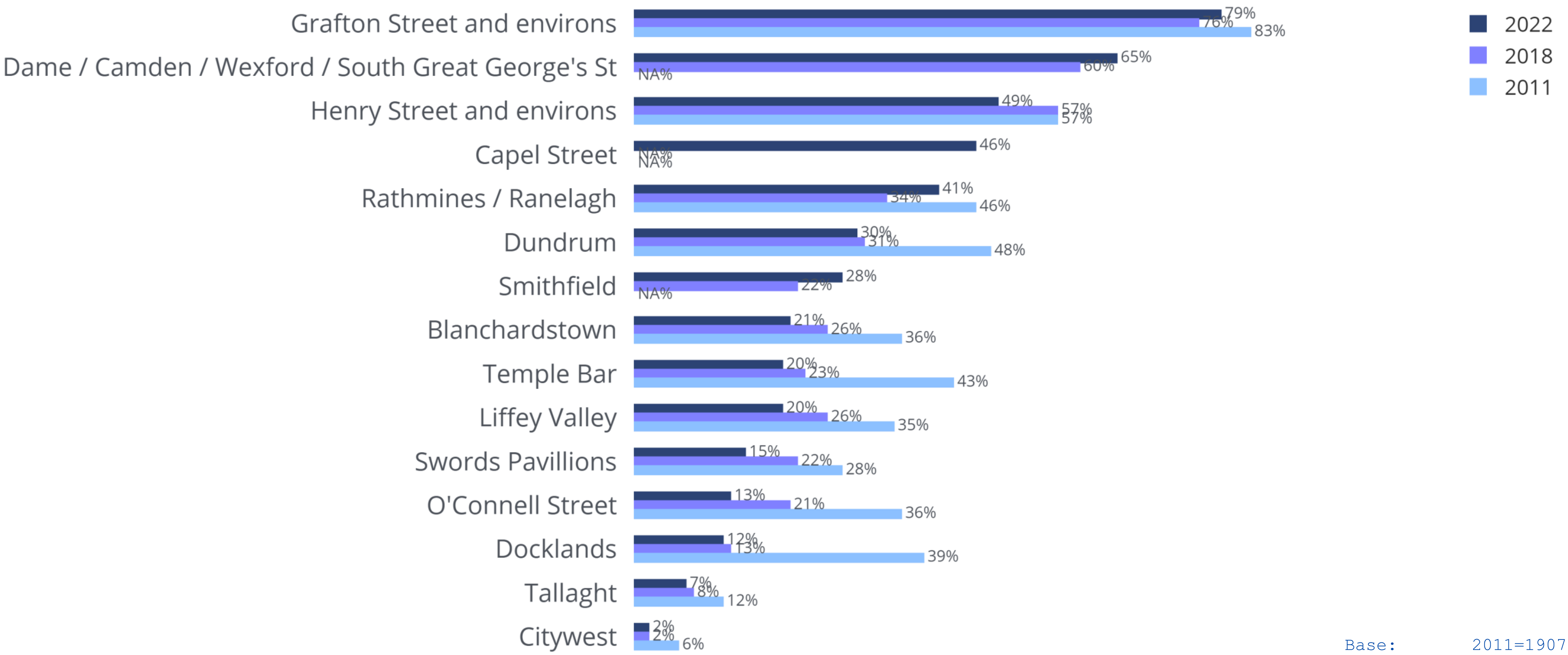
From the following areas in Dublin, please select the areas that you find appealing, specifically in relation to shopping and socialising. Please select as many as apply.



Base: 2011=1907
2018=844
2022=1036

Other Appealing Areas of Dublin

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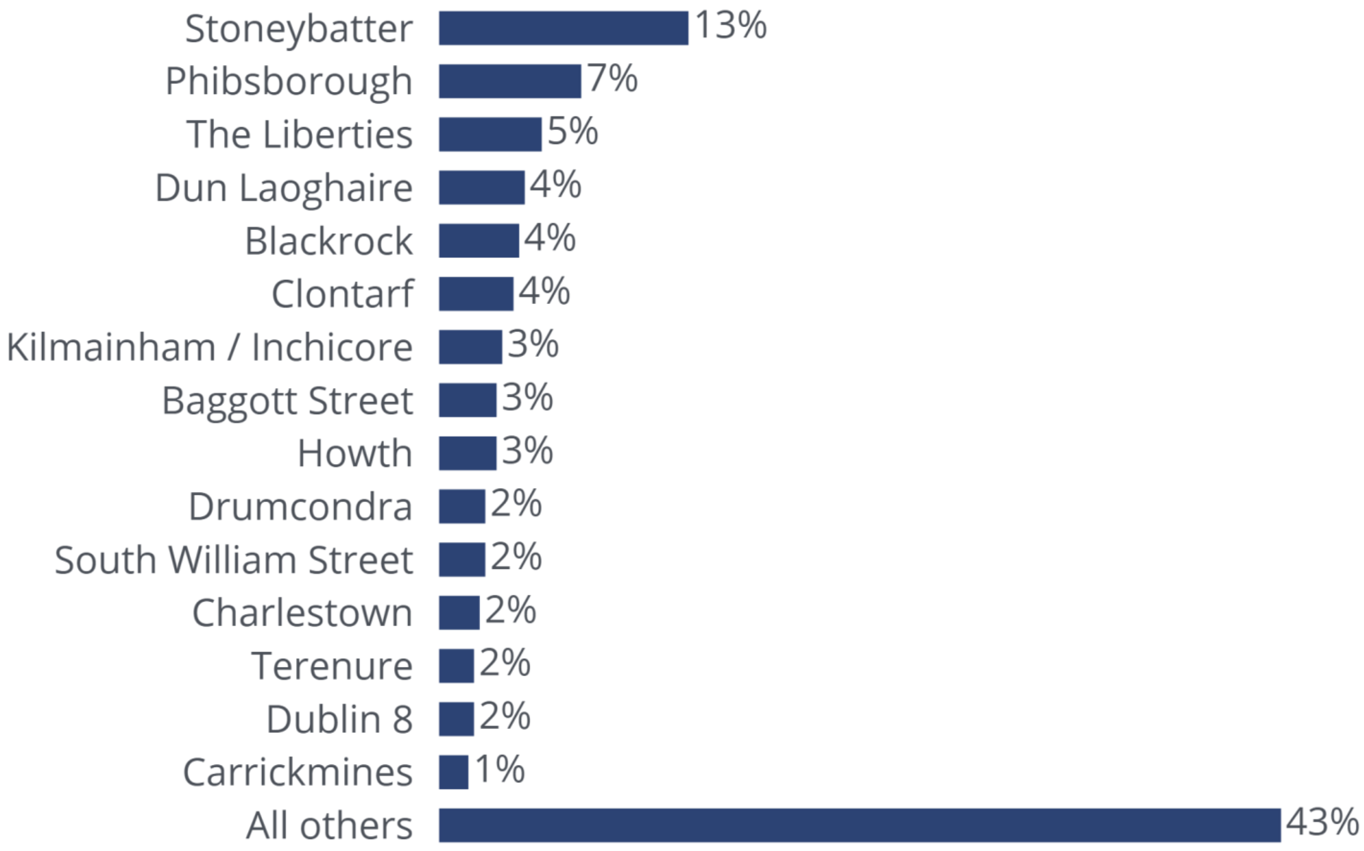
Is there another area of Dublin not listed above that is appealing to you?



Base: 349

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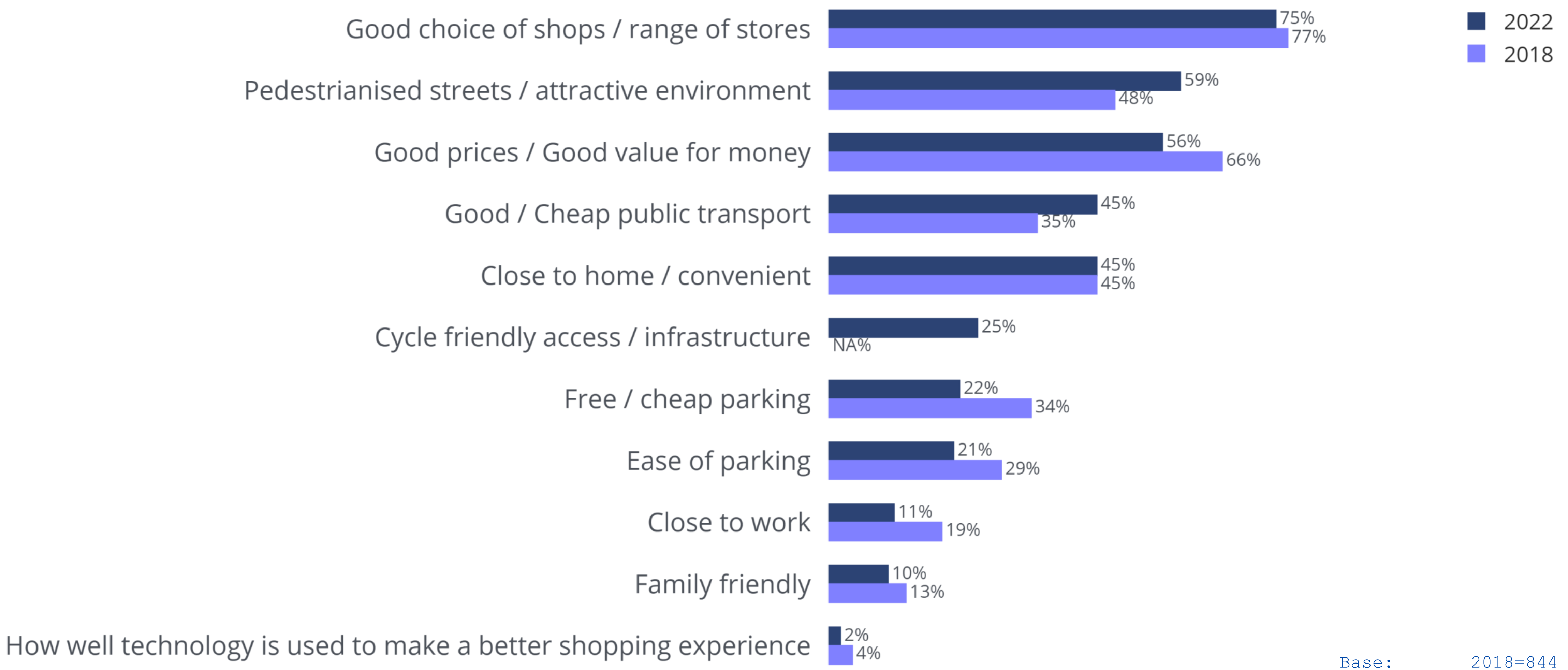
Please select the top 4 most important factors that influence where you shop in Dublin in physical stores (excluding shopping for groceries)



Base: 2018=844 2022=1036

Other Factors Influencing Where You Shop

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"Other" influencing factors specified

"Other" includes safety, range of unique and independent shops, accessibility

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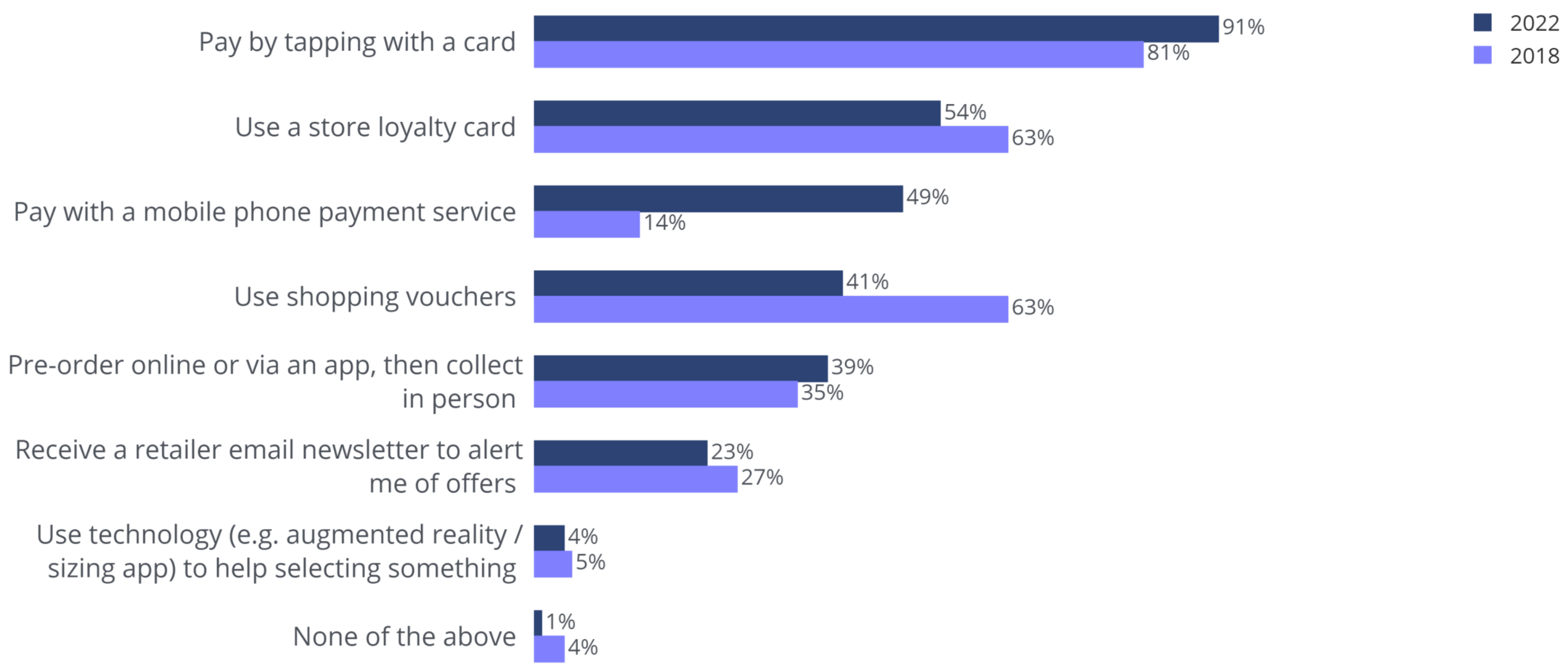
Use of Technology and Loyalty Mechanisms When Shopping - Trend

When shopping (other than for groceries), do you ever do any of the following?



63% of 18-34 year-olds pay with a mobile phone payment service.
Use of a store loyalty card is highest among over 65s at 63%.

Base: 2018=844
2022=1036

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Spend Compared with Last Year

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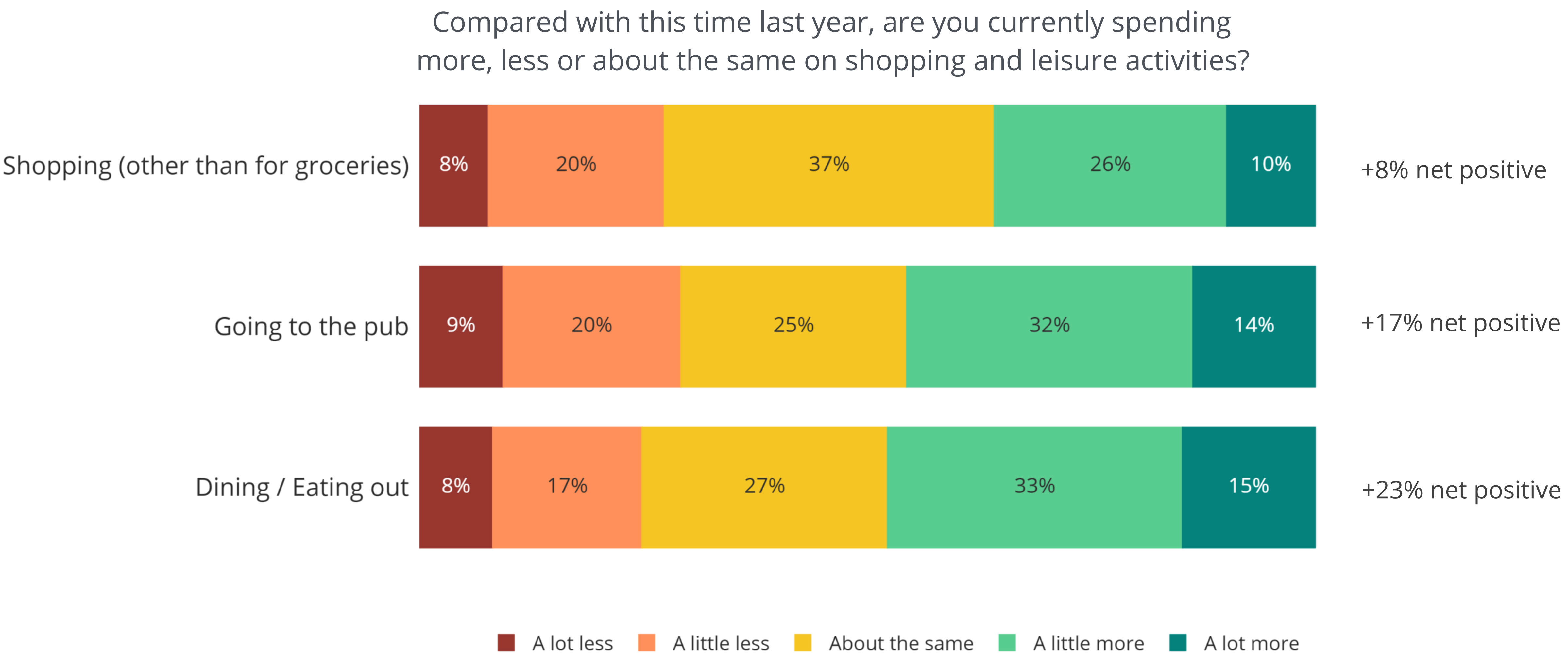

Base: 715 to 978

Anticipated Spend in the Next 12 Months

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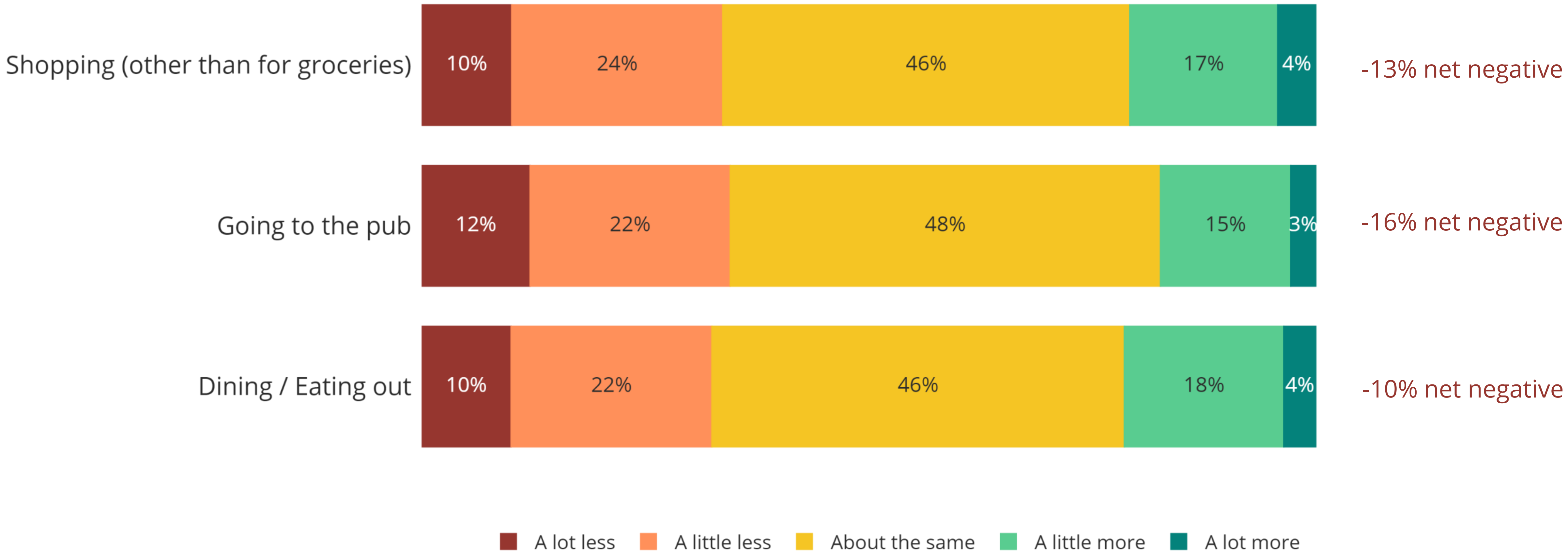
In the next 12 months, do you think you will be spending more, less or about the same on shopping and leisure activities?



Base: 716 to 978

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Value for Money in Dublin - Trend

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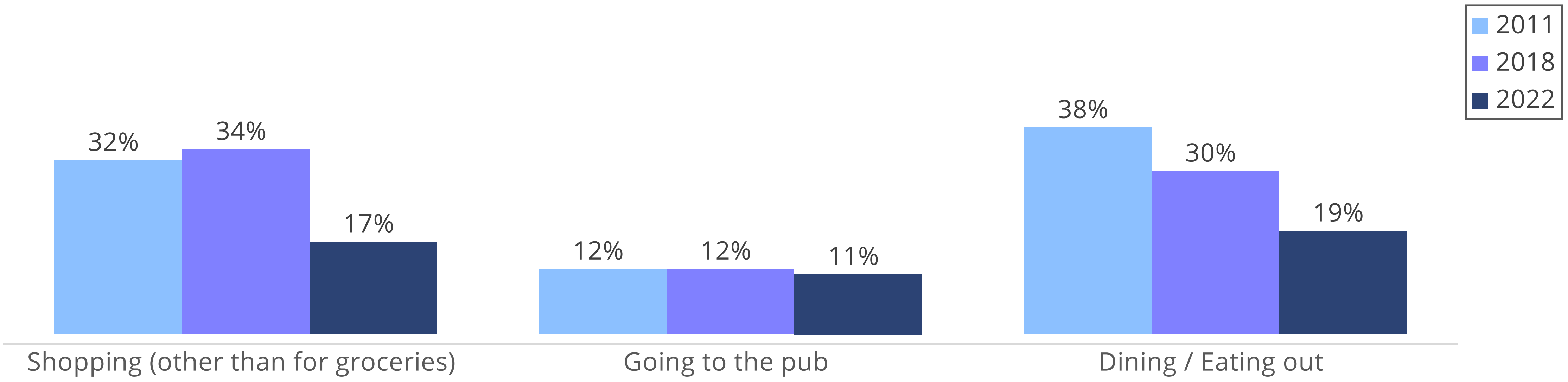
How would you rate the value for money on offer in Dublin for the following shopping / leisure activities?
% good or great value for money



Base: 2011=1907
2018=844
2022=1036

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Improving the Overall Shopping Experience in Dublin - Trend

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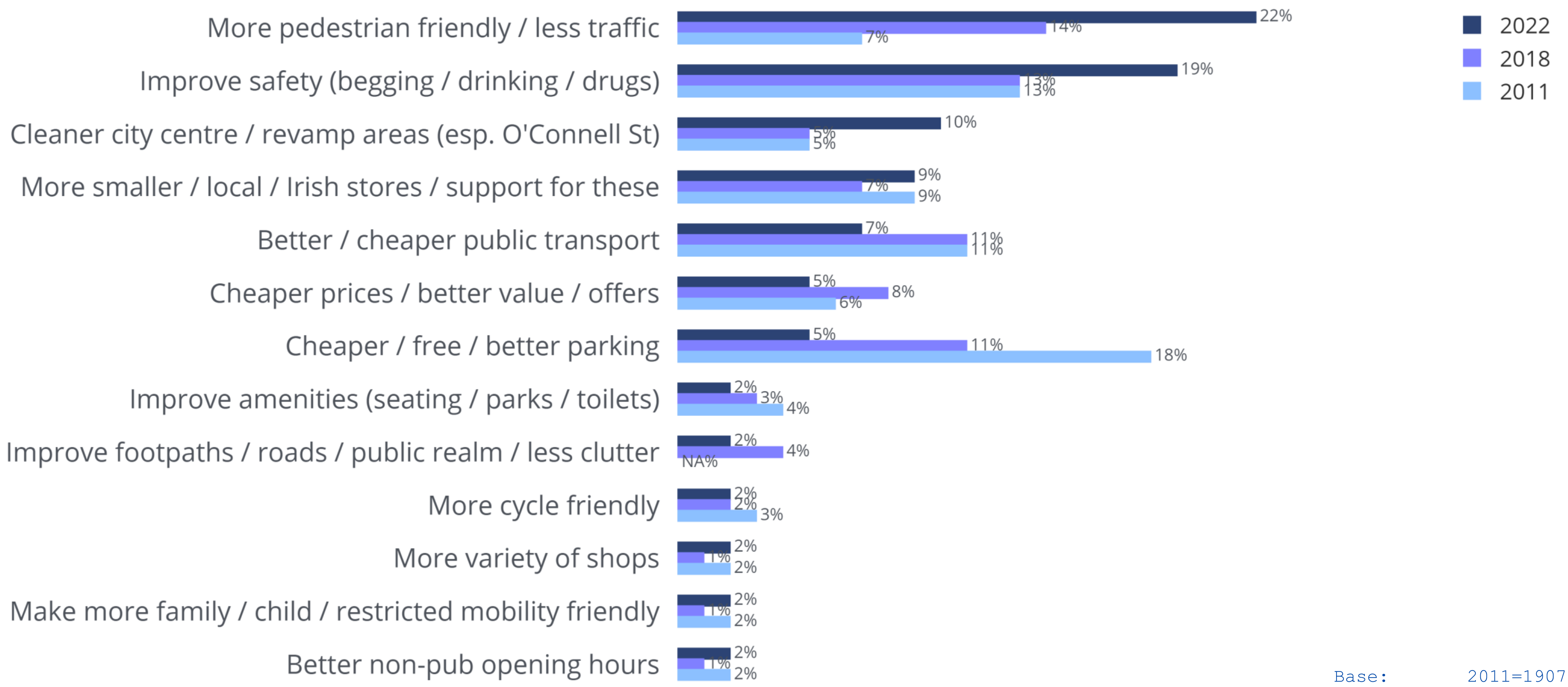
What are your suggestions for improving the overall shopping experience in Dublin?



Base: 2011=1907
2018=844
2022=1036

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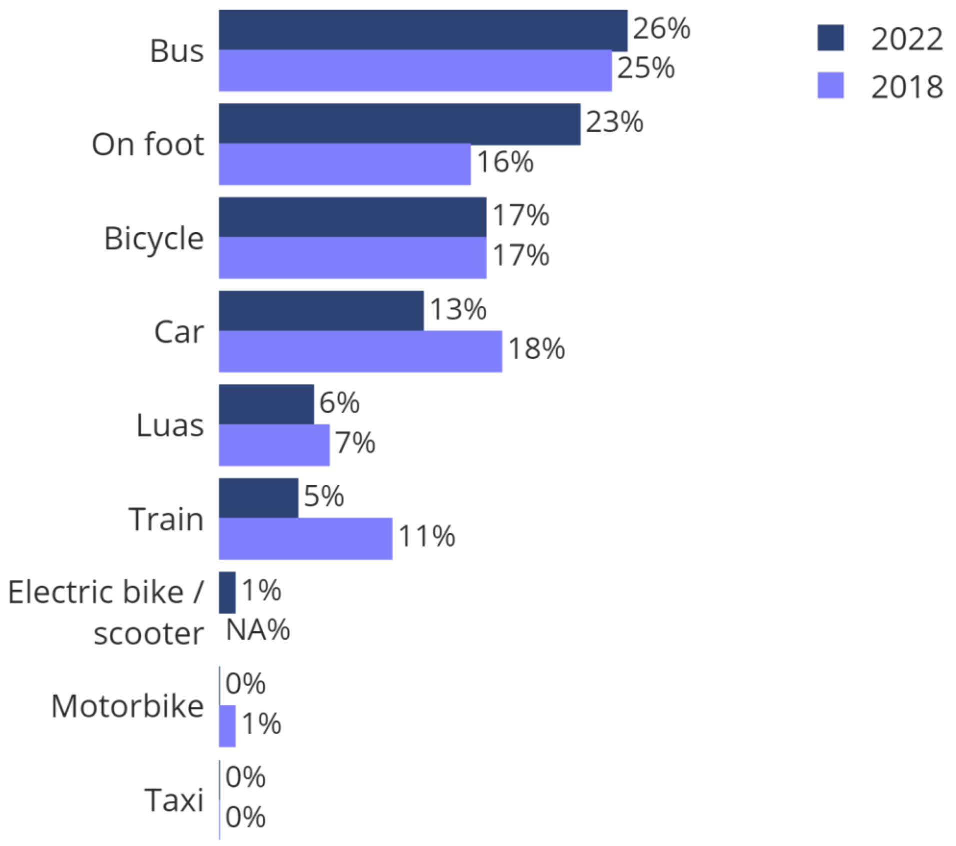
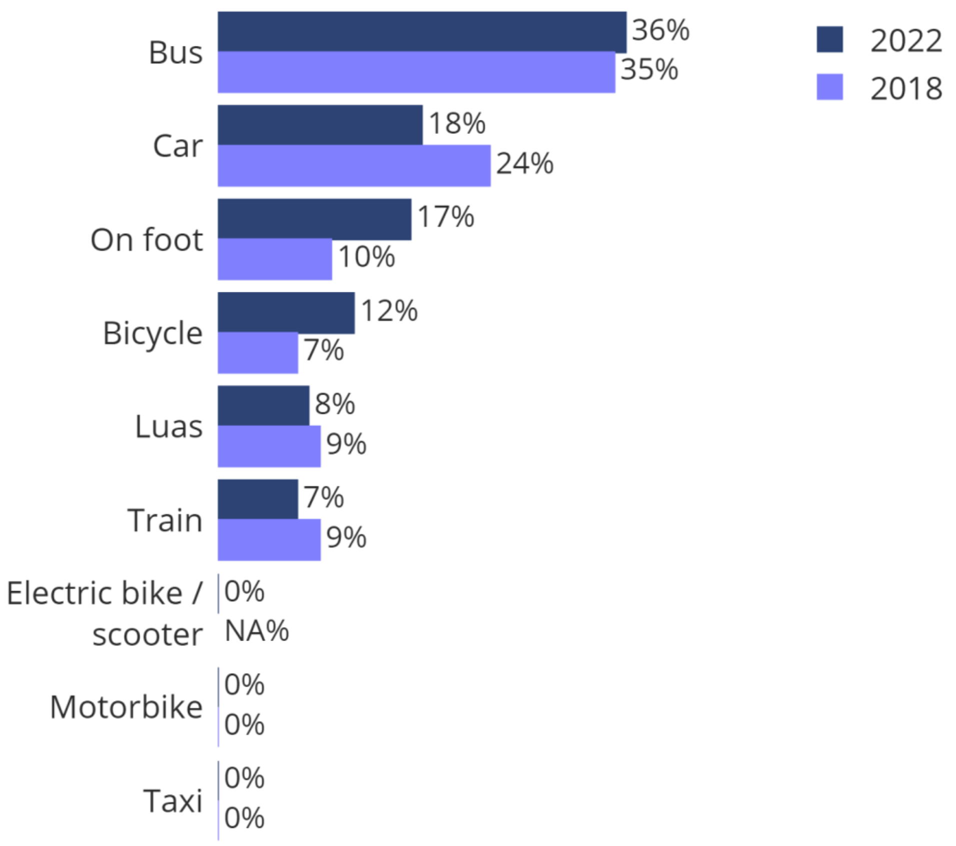
Getting in to the City Centre - Trend

In general, how do you usually get in to Dublin city centre for work or study?



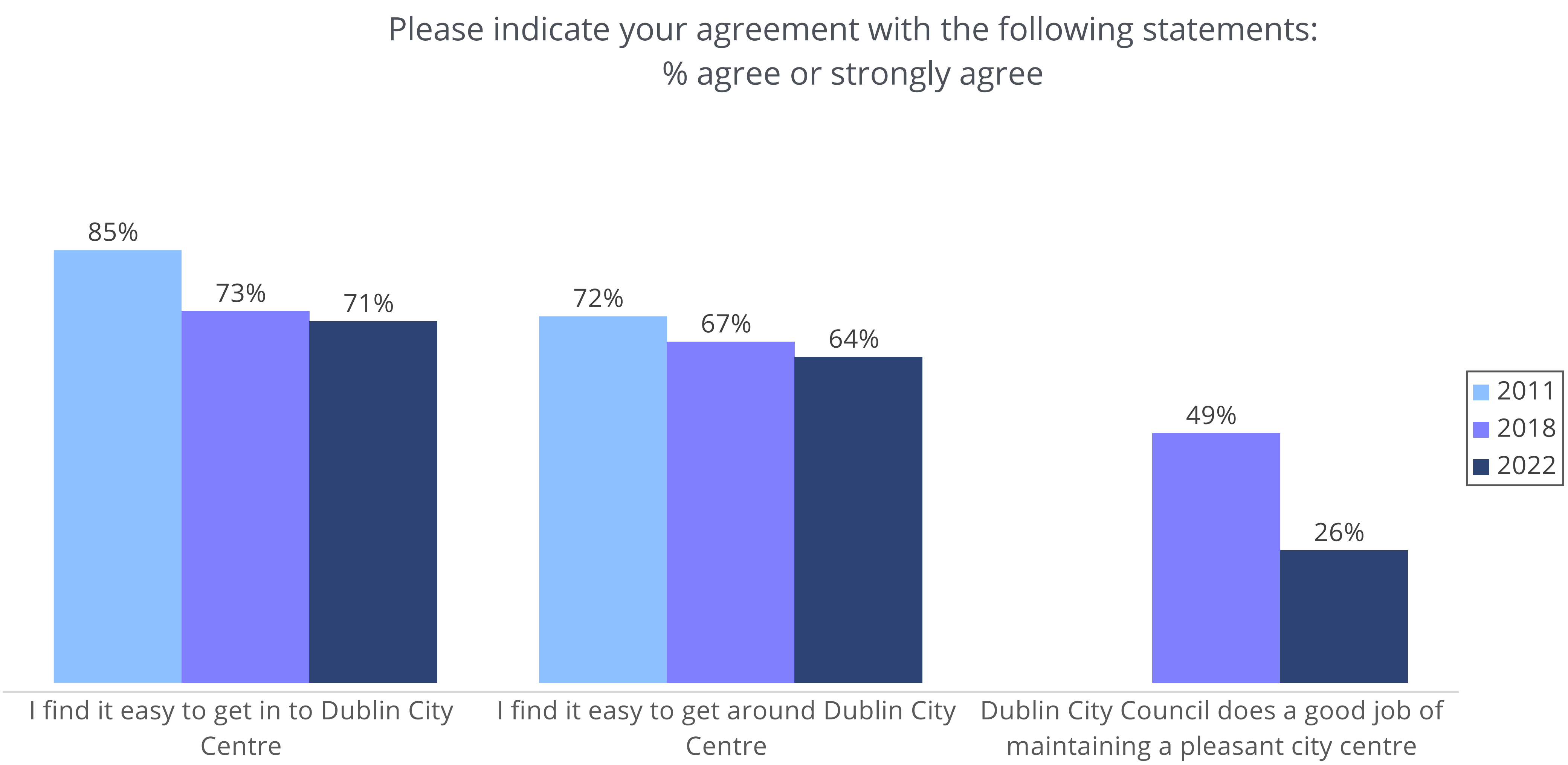
In general, how do you usually get in to Dublin city centre for shopping?



Use of bus is higher among 18-34 yea-olds, among over 65s, and among those on lower monthly income.

Agenda

Ease of Getting in and Around Dublin City Centre - Trend



Female respondents were more likely than males to agree with all three of these statements.

Base: 2011=1907
2018=844
2022=1036

Agenda

Making Dublin City Centre More Attractive for Shopping and Socialising

Comhairle Cathrach Bhaile Átha Cliath Dublin City Council

What would make Dublin city centre a more attractive place for shopping and socialising?

Base: 798

Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

Agenda

In the past 12 months, which of the following statements are true for you?

Younger respondents, those with higher educational achievement and those on higher incomes were more likely to engage in these behaviours.

Base: 1033

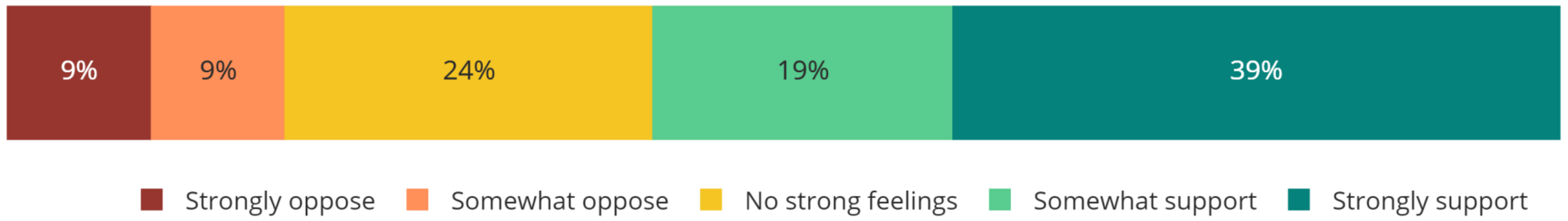
Agenda

Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

Extending Pub / Nightclub Opening Hours

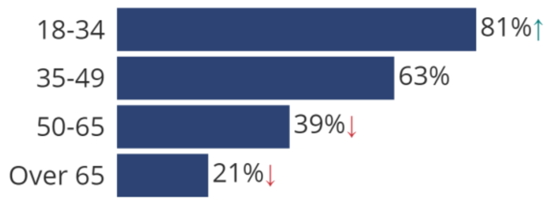
Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

The Irish government is proposing new legislation which would extend the opening hours of pubs and nightclubs. To what extent do you support or oppose this move?



58% somewhat or strongly support this move

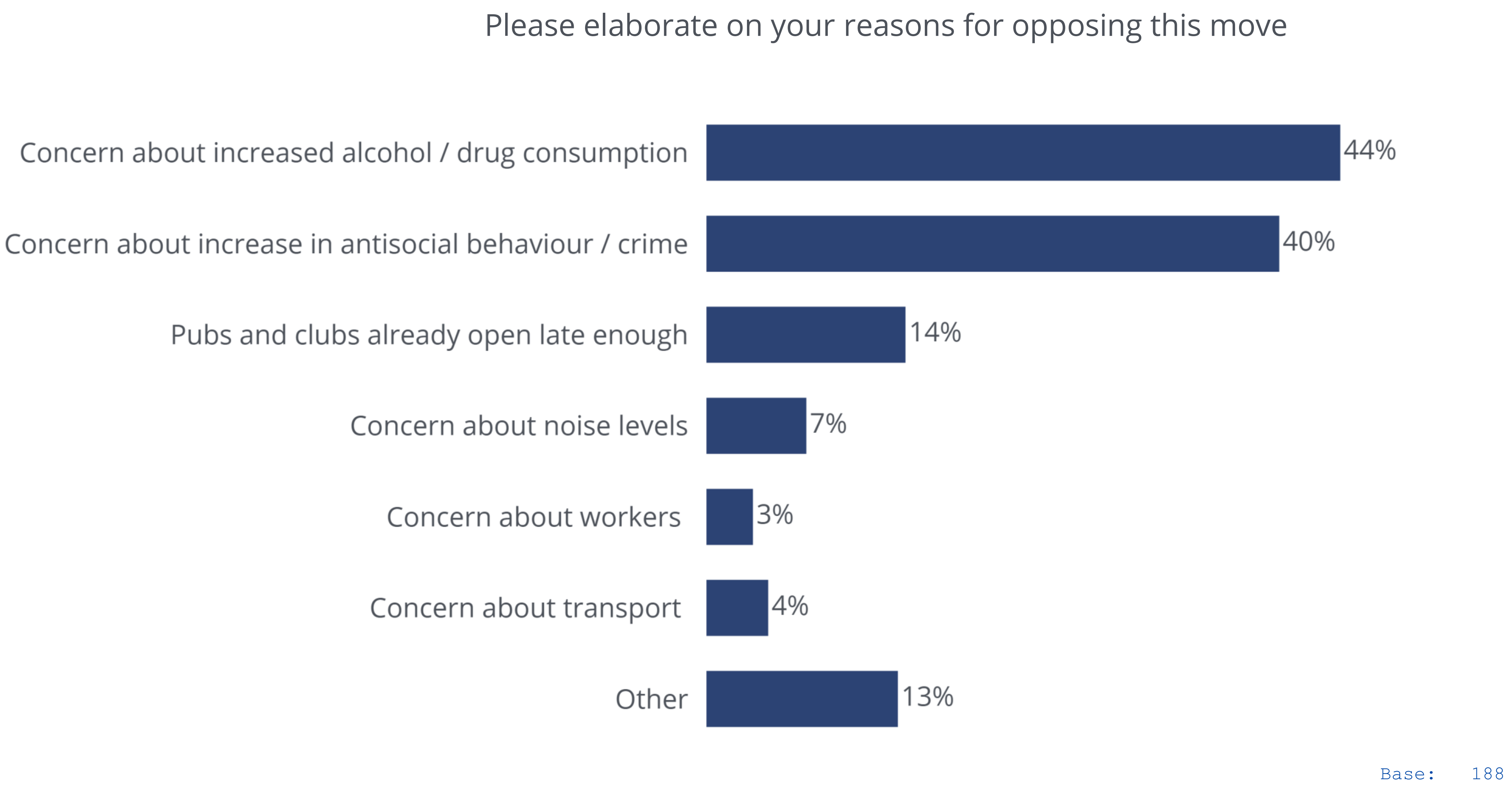
Support is higher among males and among younger age groups



Base: 1036

Reasons for Opposing Extending Pub / Nightclub Opening Hours

Comhairle Cathrach Bhaile Átha Cliath
Dublin City Council



For further information please contact:

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Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council