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Temple Bar Business Survey, 2012

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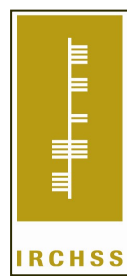
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TEMPLE BAR BUSINESS SURVEY 2012

Implementing the DIT-ACHIEV Model for Sustainable Tourism Planning



The *DIT-ACHIEV Model for Sustainable Tourism Planning* has been developed by the College of Arts and Tourism, Dublin Institute of Technology. It explores six core areas of interest - **Administration, Community, Heritage, Infrastructure, Enterprise and Visitor.**

The purpose of implementing this Model in Temple Bar (facilitated by IRCHSS funding) is to test its use in an Irish urban tourism destination.

In addition to data such as environmental measurements, information on water, waste, energy, transport, examination of local cultural, landscape and employment, the Model requires the undertaking of three dedicated surveys:

- A Visitor Survey
- A Business Survey
- A Resident Survey

With the support of local volunteers and tourism stakeholders, a *Visitor Survey* took place in Temple Bar

between June 2011, and June 2012. An additional survey took place in August 2012 in the surrounding areas of Temple Bar to investigate if people were visiting Temple Bar and what their opinion of the tourist destination was. A *Resident Survey* took place between March and May 2012 with the support of DIT students.

This publication presents an overview of the findings from the **Business Survey** of Temple Bar which took place in May 2012.

This report presents the attitudes and opinions of Temple Bar businesses regarding tourism. While there is generally good support for tourism, some serious issues have emerged which require attention to ensure the tourism industry in Temple Bar is not negatively impacted.

Note: Given the number of respondents is relatively small, caution should be taken when reviewing this report. Although not statistically relevant, results do provide a good insight into the thoughts of Temple Bar Businesses.

Generally there is a positive attitude by businesses towards tourism in Temple Bar

Project Background

In early 2011 a group of researchers from the Dublin Institute of Technology (DIT) began working with a team in Temple Bar to explore the sustainability of tourism in the area and plan for its future.

Team Temple Bar is composed of six local partners:

- Temple Bar Traders
- Temple Bar Cultural Trust
- Tourism Ireland
- Dublin Tourism (which has since become part of Fáilte Ireland)
- Dublin City Council
- The Morgan Hotel

During the 12 months of the project, the following key activities took place:

- In June 2011 a very well attended public consultation meeting took place to identify the key issues and challenges for tourism in Temple Bar. The wide range of representation at this meeting included among others, local restaurant, pub, hotel and gallery owners,

An Garda Síochána, representatives from voluntary and state agencies, public representatives etc. This meeting resulted in the identification of numerous potential sustainable tourism indicators.

- Subsequently, regular steering committee meetings took place to discuss and analyse project progress with the aim of ensuring that the project remained on track and to tackle emerging issues relating to the collection of data.
- A meeting with administration personnel took place in June 2012 to discuss the management of tourism issues in Temple Bar.
- A number of presentations have been made by the project team at national and international conferences, raising the profile of the project and Temple Bar.

Early indications are that the Model provides the Irish Tourism Industry with a valuable tool for sustainable tourism planning at a destination level.

Profile of Businesses who Answered Survey

This survey was circulated to 200 businesses in Temple Bar between April and June 2012. The survey was conducted face to face and online.

The response rate was low at 11.5%. While a concentrated effort was made to engage businesses in Temple Bar to participate in the project, there was poor uptake which suggests a possible lack of engagement by businesses in tourism planning / management. An effective business network is essential for developing and managing tourism in Temple Bar in a sustainable manner. Although the results are not statistically representative, and cannot be generalised with confidence, they give an indication of the general attitude towards tourism in the area. Caution should be taken when reviewing the results.

Length of Time Operating in Temple Bar



Location of Business: 100% of businesses are located within Temple Bar.

Length of Operation: The average length of time which the responding businesses have been in operation is 11-20 years. 22% of businesses have been in operation for less than 10 years, but, 18% have been in existence more than 20 years. (See Figure 1)

Ownership of Premises: 74% rent their business premises, 17% own their premises and 9% both own and rent their business premises.

Main Business Activity



Main Business Activity: 31% of those surveyed (See Figure 2) indicate that 'Hospitality / Tourism' is their main business activity and 31% are also in Retail. While 30% indicated their businesses as 'Other', further probing revealed that many of these respondents operate cafes or market stalls which can in fact be considered as tourism businesses, suggesting a lack of awareness of the role they play in the visitor experience.

Size of Business: The respondents to the survey between them employ in the region of 580 people. The micro-SME nature of busi-

nesses is highlighted by the small number of employees at all levels. Figure 3 shows the average number of staff employed by category: Permanent Full-Time (12.86 employees); Contract Full-Time (1.95); Part-Time (3.32); Casual (3.59) and; Seasonal (4.45). The number of Permanent Full-Time employees is skewed due to three businesses which employ over 60 staff each. The most frequently mentioned number for each category employed (removing maximum & minimums) is as follows: 4 permanent full time, 2 contract full-time, 2 part-time, 1 casual & 1 seasonal employee.

Average Number of Staff Employed per Business



Importance of Tourism

Degree to which Business activity relates to Tourism: All respondents to the survey indicated that their business activity is either 'directly' (13%) or 'indirectly' (57%) related to Tourism (See Figure 4). A further 30% note that their business activity is both directly and indirectly related to tourism.

Degree to which Business activity relies on Tourism: In contrast to the results when asked how business activity relates to tourism, 17% of respondents stated that their business is not reliant on tourism. 61% state that their business is over 50% reliant on tourism. (See Figure 5)

Doing Business in Temple Bar

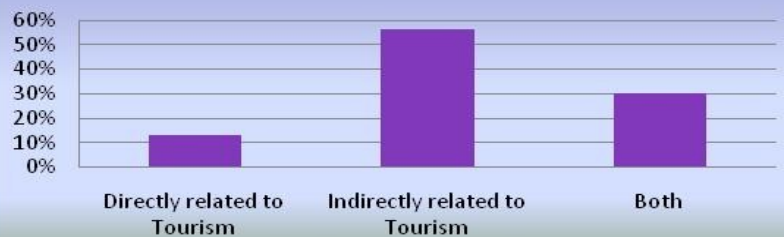
Rent Levels: 62% of respondents felt rent levels in Temple Bar are either high (33%) or very high (29%) (See Figure 6)

Payment of Commercial Rates: 62% felt commercial rates are either high (19%) or very high (43%). However, 14% felt that the rates were very low. (See Figure 7)

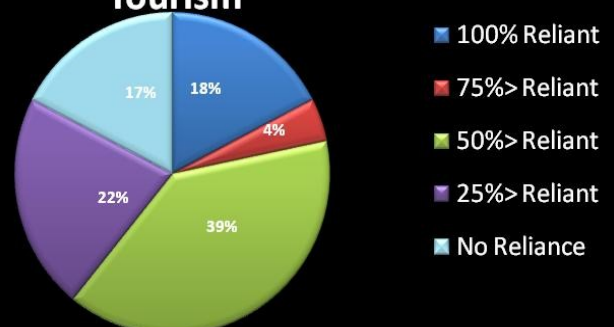
Value for Money for Rates: When specifically asked to rate value for money in terms of specific services:

- Only 9% are dissatisfied with Street Cleaning and 59% are satisfied (45%) or very satisfied (14%).
- 36% are dissatisfied with Public Area Landscaping, Presentation & Maintenance while 32% are satisfied (See Figure 8).

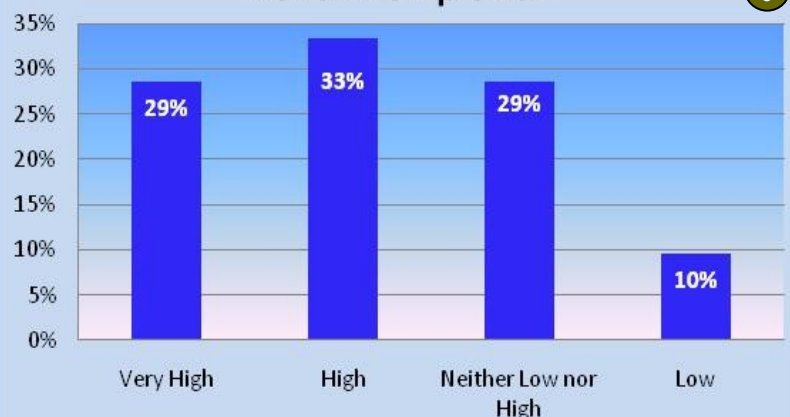
How Business Activity Relates to Tourism



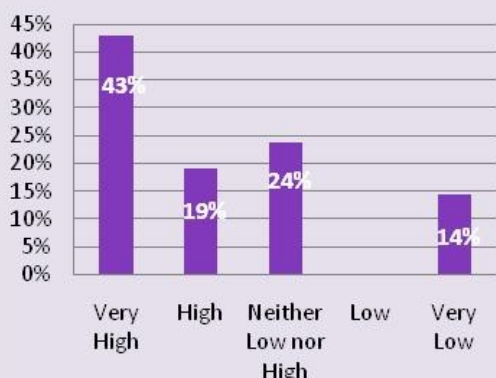
How Reliant is your Business on Tourism



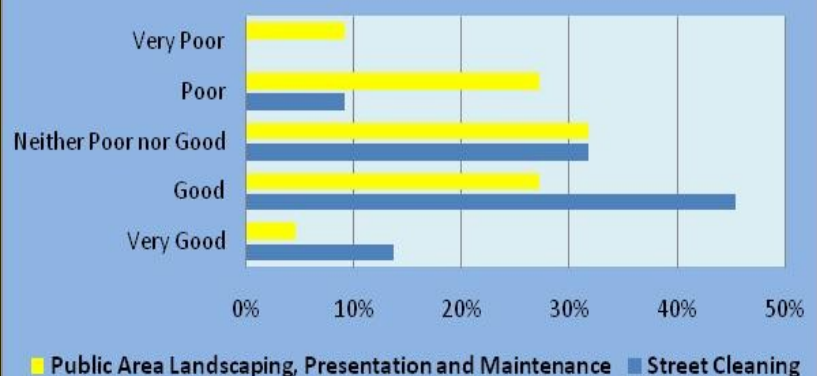
Rent in Temple Bar



Commercial Rates in Temple Bar



Opinion on Management of Local Environment



Doing Business in Temple Bar (Costs / Finance)

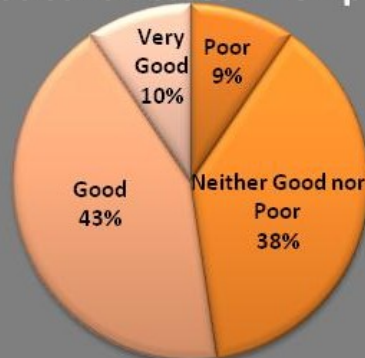
Operating Costs: In Temple Bar, operating costs are generally considered to be high for finance, labour and insurance (See Figure 9). However finance and labour are considered to be neither high nor low for a large percentage of respondents. Labour costs are seen to be high (43%) or very high (9%) by 53% of businesses. 38% of respondents consider Labour costs to be neither high nor low. Insurance is considered to be high (45%) or very high (27%) by 72% of companies and 53% of respondents see Finance Cost as high (37%) or very high (16%).

Doing Business in Temple Bar (Infrastructure)

Access to Broadband Services in Temple Bar: 53% indicated that access to broadband services was either Good (43%) or Very Good

(10%) as shown in Figure 10. 9% considered it to be poor but nobody stated it to be Very Poor.

Broadband Access in Temple Bar



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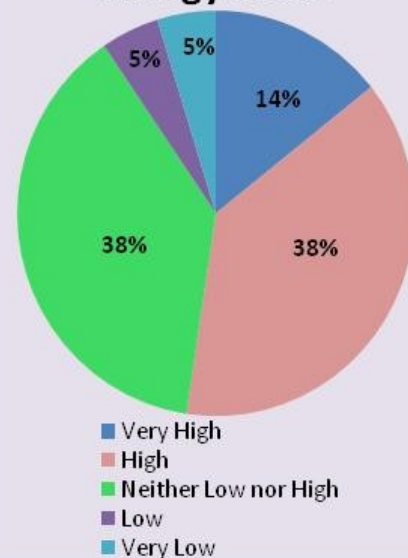
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Operating Costs



Rating of Energy Costs: 52% of respondents were dissatisfied with current energy costs with 38% rating it as High and 14% rating it as Very High. Only 10% consider energy costs to be low or very low. (Figure 11).

Energy Costs



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Business Infrastructure in Temple Bar

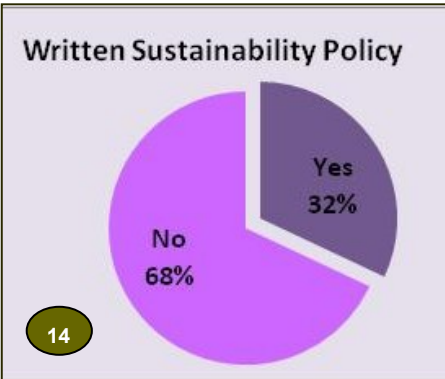
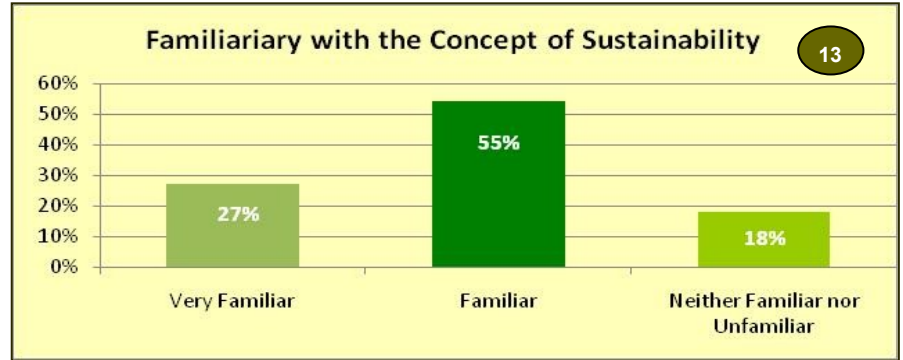
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Rating of Business Infrastructure: 52% felt that infrastructure in the area is either Poor (38%) or Very Poor (14%), while 24% feel it is Good (See Figure 12). From a business perspective, 65% are dissatisfied with parking.

Sustainable Practices

Awareness of Sustainability: 82% indicated their business was familiar with the concept of sustainability (55% familiar & 27% very familiar). No respondent claimed to be unfamiliar with the concept (**See Figure 13**).

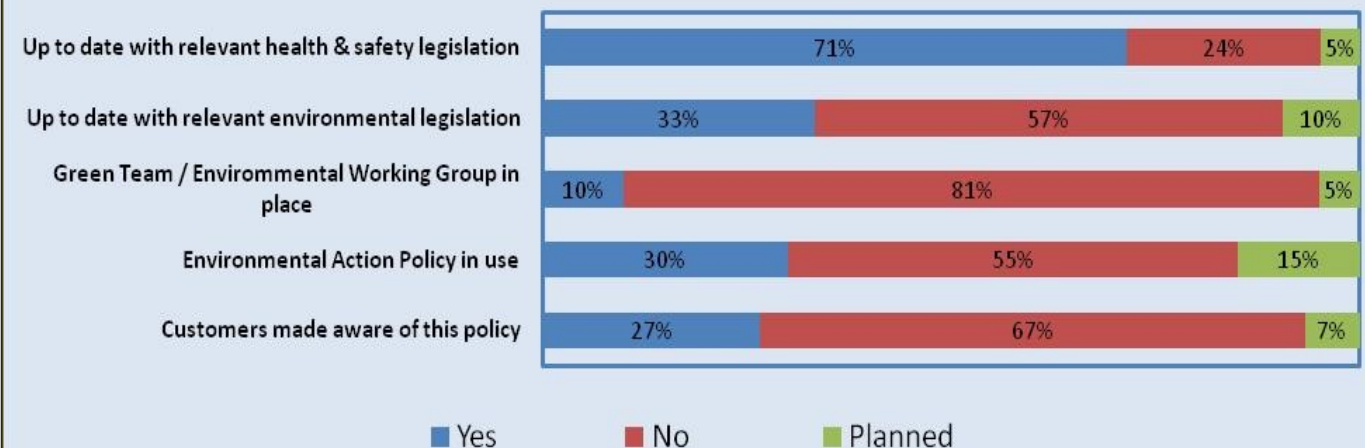


Action Policy in use and 27% make their customers aware of such a policy. In contrast, businesses were asked to consider Health and Safety legislation, which is strictly enforced, 71% of respondents claim to be up to date in this regard and only 24% are not. (**See Figure 15**).

Active Sustainable Business Management: Respondents were asked to indicate the degree to which they actively manage energy,

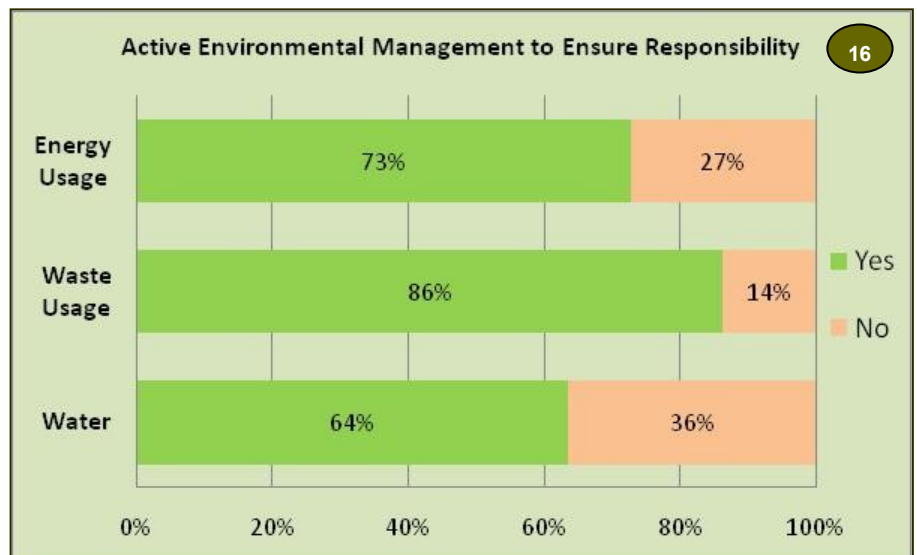
waste and water usage to be more responsible. **Figure 16** shows that 73% of businesses actively managed their energy usage to make it more responsible, 86% actively managed waste and 64% actively managed water usage. This suggests that while many do not have a sustainability policy, many do in fact incorporate sustainable practices in their business.

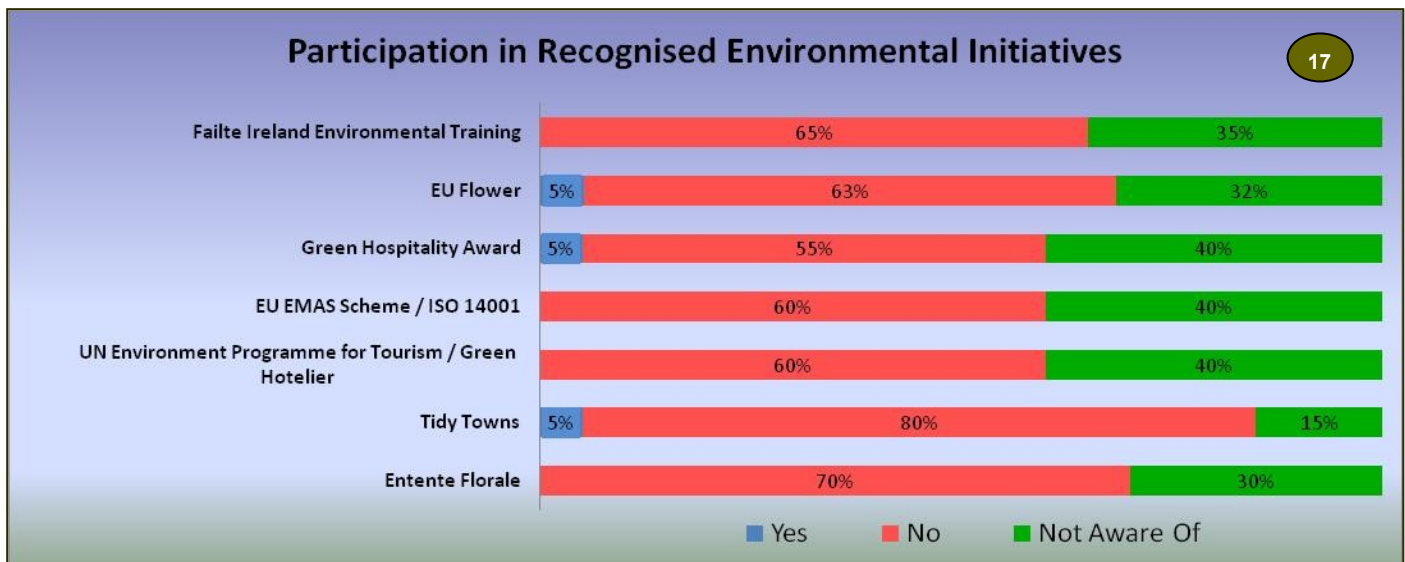
Business and Environmental Practices



Sustainable Business Policies: Despite the strong awareness of sustainability, only 32% admitted to having a written sustainability policy for their business (**See Figure 14**).

When asked to provide more specific information pertaining to environmental / sustainable policies, businesses provided a variety of answers. In broad terms respondents do not seem to have active policies in relation to environmental practices with only 5% claiming to have a 'Green Team' in place and 57% not up to date with relevant environmental legislation. Only 30% have an Environmental





Participation in Recognised Environmental Initiatives

Participation in Recognised Initiatives: In line with the low number of policies in relation to environmental practices there is a very low level of participation, or awareness of a number of national and European environmental initiatives (**See Figure 17**). Although there is very little participation (5%),

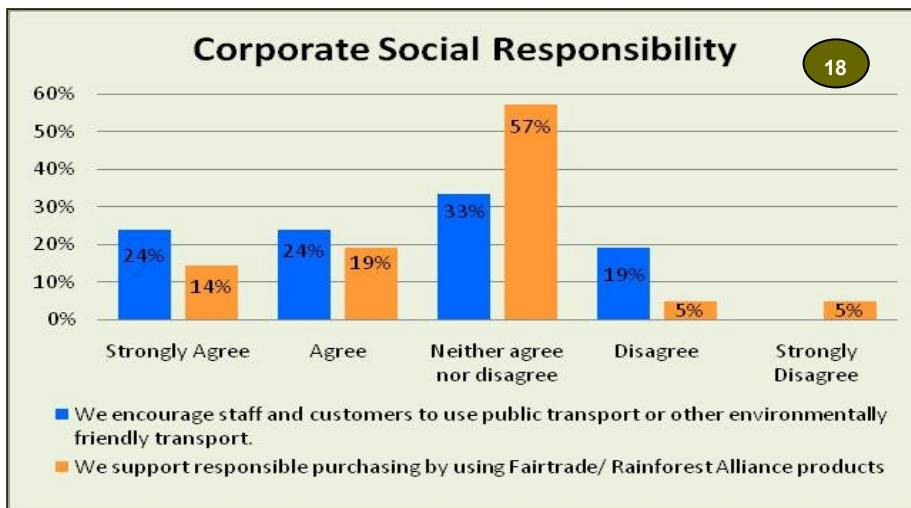
respondents were aware of the Tidy Towns Initiative.

A higher level of participation in and awareness of some of the tourism and hospitality specific initiatives was anticipated considering the contribution Temple Bar makes to Dublin's tourism industry.

Initiatives Re- Disability

60% indicated they comply with all relevant regulations regarding disability access. As many of the buildings in Temple Bar are listed, some respondents stated that they can only comply where possible.

Measures taken to facilitate clients with disability included accessible toilets, access ramps, and elevators.



Environmental Certification / Corporate Social Responsibility

Environmental Certification: Despite a high awareness of the concept of sustainability, none of the businesses surveyed indicated that their business has been awarded Environmental Certification other than those listed on Figure 17.

Corporate Social Responsibility: While only 5% indicated that they have a Corporate Social

Responsibility (CSR) Policy, when investigated, there was some participation in socially responsible practices including encouraging staff & customers to use public or other environmentally friendly transport & supporting responsible purchasing. (**See Figure 18**).

60% feel their local environment (built, natural & cultural) is not utilised to its maximum potential.

Participation in Community Activities

Involvement with Local Community Activities: Direct involvement by businesses in local community initiatives is poor. 44% of businesses are actively involved in delivery and promotion of events (**See Figure 19**). 38% are involved with Cultural Activities.

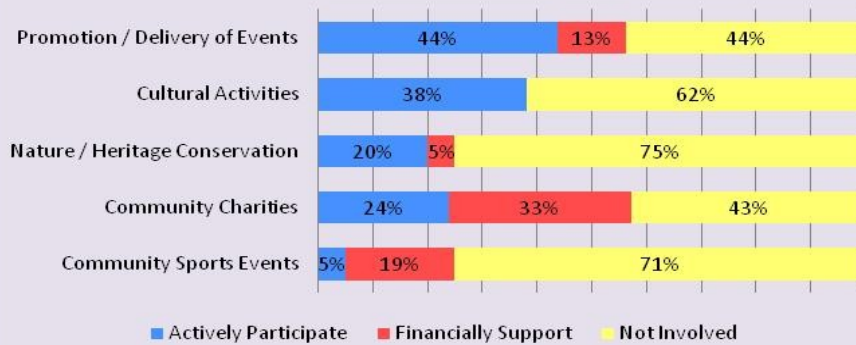
57% support local charities either through active participation (24%) or Financial Support (33%). There is a very high level of non participation in all of the outlined activities with 75% having no involvement in Nature / Heritage Conservation and surprisingly 62% have no involvement in Cultural Activities.

Regulation

61% of businesses surveyed are approved / regulated by national organisations, i.e. Fáilte Ireland, Heritage Council, HSE, Food Safety Authority of Ireland, and the Central Bank of Ireland.

Participation in Community Activities

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Sustainable Work Initiatives

When asked about initiatives to demonstrate positive attitudes in the workplace and good treatment of staff, results were generally positive. 80% provide flexible and reasonable work hours, 72% set fair salary levels, 85% comply with and exceed health and safety measures and 70% provide continuous development to all staff. However, the businesses not engaging in these measures is of some concern.

Partnerships / Networks

Involvement with Networks etc.: Networking among respondents is weak. There is very little involvement in many of the available networks and cooperatives. When asked specifically about participation, 70% are involved with Temple Bar Traders, (40% actively and 30% occasionally). 44% are involved with the Temple Bar Cultural Trust, (24% actively and 20% occasionally). However, this result could be biased due to distribution of surveys through these organisations.

Involvement with other groups is very low with only 5% actively participating in LEADER programmes and 22% with Fáilte Ireland Networks. No respondent indicated active involvement with Skillnets but only 11% participate occasionally (See [Figure 20](#)). When asked about any other networks they are involved in, respondents mentioned Tourism Ireland, Dublin City Business Association (DCBA), Business Improvement District Scheme (BIDS), Creative Dublin Alliance, and Creative D.

Food Businesses

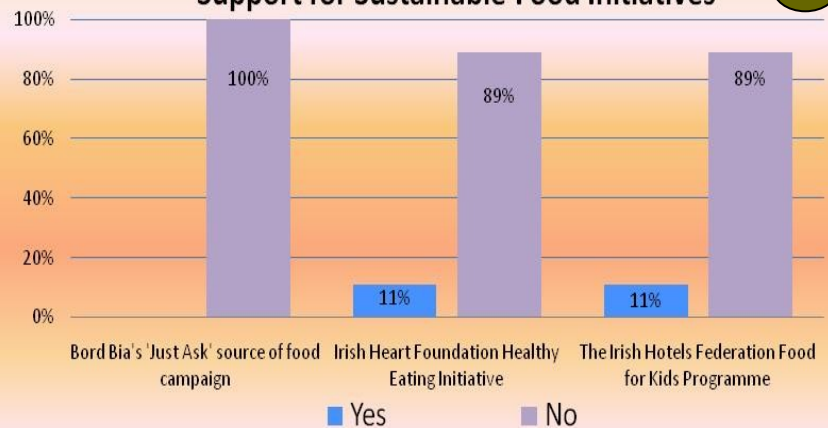
Food: With food and tourism being so closely linked, a number of questions in the survey asked specifically about food and its sustainability.

48% of respondents indicated that their business is involved in food preparation / catering. These respondents were then asked to provide more detail on their activities / practices.

68% of the food businesses use locally produced ingredients, sourced within a 100km radius. 27% of the businesses source more than 90% of their ingredients locally. Very few national sustainable food initiatives are supported by Temple Bar businesses with only 11% supporting both the 'Healthy Eating Initiative' and 'Food for Kids' ([See Figure 21](#)).

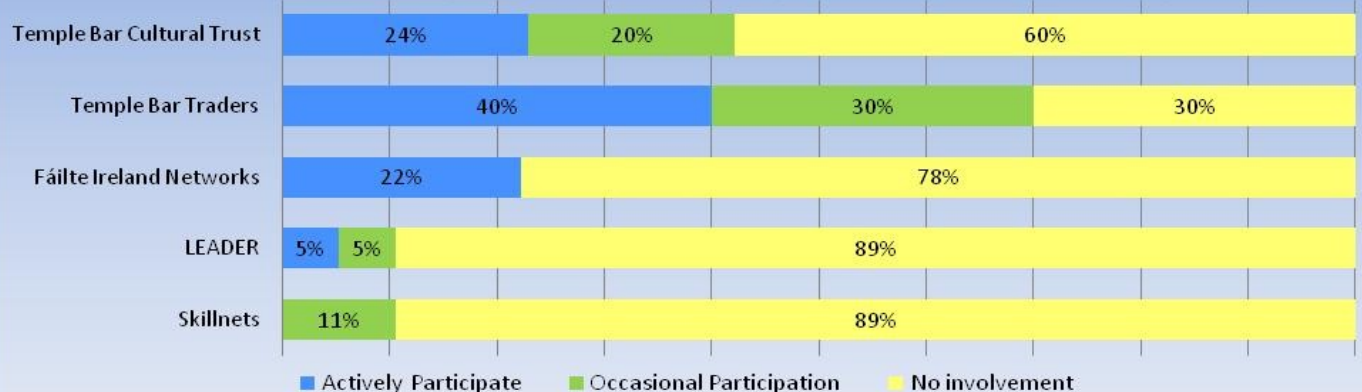
Support for Sustainable Food Initiatives

21



Business Participation in Local Cooperatives / Partnerships

20



Selection of Comments from Businesses in Temple Bar

Throughout this report, statistics and summary data are presented. The following is a selection of direct quotes reflecting the range of opinions and comments expressed by respondents:

- The Temple Bar Food Market is a very good attraction for tourists.
- Temple Bar represents such a large proportion of the Irish Tourism product but in recent years has deteriorated.
- The area suffers from a lack of unified branding and a lack of leadership. The struggle between relevant leadership bodies results in a division of resources and disjointed thinking and planning.
- Temple Bar has huge potential and should be a showcase for Ireland and Dublin, not only Temple Bar.
- Needs cultural accessibility after 5pm.
- Temple Bar needs unified leadership and branding.
- On-street drinking by all walks of life is having a very negative effect on the area and creating a really bad impression.
- The short term gain in the noughties did a lot of damage to Temple Bar.
- If I could suggest one improvement that would help tourism in Temple Bar it would be WALL MAPS!!! Tourists and Dubliners alike don't know the layout of Temple Bar, it's a running joke amongst traders that if we all charged for directions we would be rich, we really need street maps up on the walls.
- Temple Bar needs a facelift but nobody knows whose responsibility it is to do it.
- The tidiness of the general Temple Bar area needs urgent attention.
- I would love to meet other tourism and cultural organisations but as I cannot afford to join the support organisations, I have no opportunity to do so.

Overall Conclusions

The following is a range of the **issues of concern which were raised** in the survey :

- Rates and return on investment in relation to management of public area landscaping, presentation and maintenance.
- Operating costs—rent, finance, labour and insurance in particular.
- Lack of management of different visitor types & potential related anti-social behaviour.

Some key positive issues which were regularly raised were:

- The quality of the local landscape & buildings.
- Good access to broadband.

Low Levels of Involvement in some areas are of concern :

- Cultural Initiatives.
- Environmental Policy & Initiatives - actions & awareness.
- Corporate Social Responsibility.
- Networking / partnerships / co-operatives .

Areas for Development include:

- Improved management and leadership of Tourism businesses and facilities including assistance for new businesses when setting up in Temple Bar.
- Improved business networks to connect tourism businesses.
- Improved signage throughout Temple Bar.
- Improved community spirit.
- Ensure inclusion of all interested businesses in tourism development & central co-ordination of different groups towards a common goal.
- Continued growth in tourism should be supported as it is an indigenous industry with employment potential that is drawn from the domestic economy.



For more details about the survey or the overall project, please contact Dublin Institute of Technology (DIT): Kevin.griffin@dit.ie
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