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## 2010 Killarney Business Survey

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# KILLARNEY BUSINESS SURVEY 2010



Comhshaoil, Oidhreacht agus Rialtas Áitiúil  
Environment, Heritage and Local Government



## DIT-ACHIEV Project: *Achieving Sustainability in Killarney*

The DIT-ACHIEV Model for the Sustainable Management of Tourism has been developed by the School of Hospitality Management and Tourism, Dublin Institute of Technology and is endorsed by the Environmental Protection Agency and Fáilte Ireland. It explores six areas of investigation - **Administration, Community, Heritage, Infrastructure, Enterprise and Visitor.**

The purpose of piloting this DIT-ACHIEV model in Killarney is to test its use with the objective to refine and adjust its methodology, so that it can be applied in any Irish tourism destination.

Early indications are that The Model will provide the Irish Tourism Industry with a valuable tool for making its product and management far more sustainable.

In addition to data such as environmental measurements, information on water, waste, energy, transport, examination of local cultural,

environmental and employment statistics, the model requires the undertaking of three dedicated surveys:

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

With the support of local volunteers and students, a year-long Visitor Survey has taken place throughout Killarney. A survey of residents was undertaken at the outset of the year and this **Business Survey** was run during the latter part of the summer months.

250 businesses in Killarney Town and Valley were invited to participate and this publication presents the views of the 157 who completed the survey on-line and face-to-face. In almost all instances the respondents were owners / managers, and most respondents answered all of the questions. Thus, this report provides a good overall representation of the Killarney business community.

## Purpose of Business Survey - Turning Findings into Actions

While this survey provides a wealth of information pertaining to doing business in Killarney, and Killarney business community's view of tourism, the survey is not an end in itself. Its main purpose is to lead to actions not just conclusions.

The main phases in the research model being followed in this overall project can be simplified as follows:

**Data Collection**

**Data Analysis**

**Identification of Issues**

**Planning for the Future**

All of this is undertaken under the framework of the internationally recognised **DIT-ACHIEV Model for Sustainable Tourism Management.**

At this stage, a wealth of data has been collected and analysed for Killarney Town and Valley, ranging across the

themes outlined above, the next phase will be to identify the most substantial issues which have emerged and to put action plans / methodologies in place, so that they can be treated in a systematic and organised fashion.

This will lead to Killarney becoming a more sustainably managed Tourism Destination into the future, and a sustainable tourism industry, is good for all businesses in Killarney.

Over the coming months, analysis of the various surveys and other data collection procedures of the **DIT-ACHIEV Model** will continue towards the identification of overarching issues of concern. In parallel with this, structures will be developed whereby planning for the future can begin.

This is an exciting and challenging time for Killarney Tourism, and will ensure healthy and prosperous development into the future.

**Profile of Businesses who Answered Survey**

This survey took place with 250 businesses in Killarney Town & Valley between May and Sept 2010. the survey was conducted face to face and online.

The response rate was 63% which meant 157 businesses responded to the survey, the majority answering all of the questions. This response rate ensures a high level of validity was obtained (technically speaking, the results can be generalised with a confidence level of over 95% ).

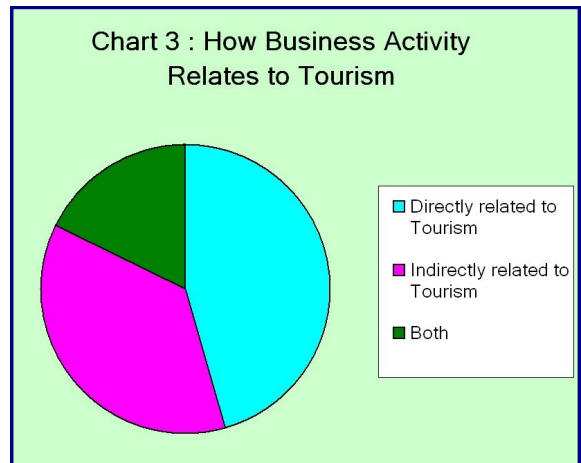
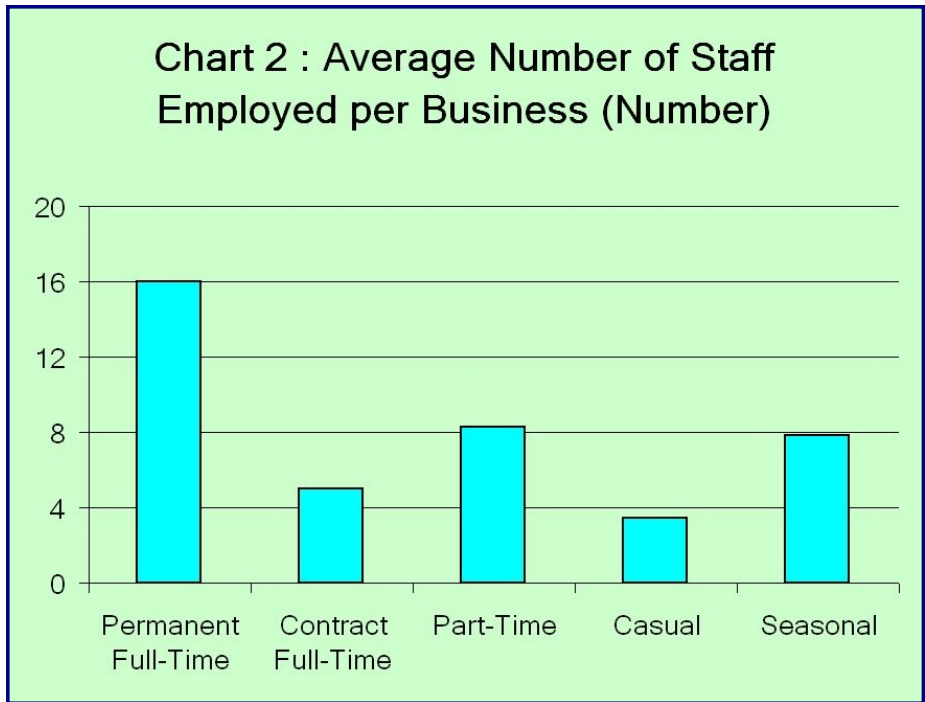
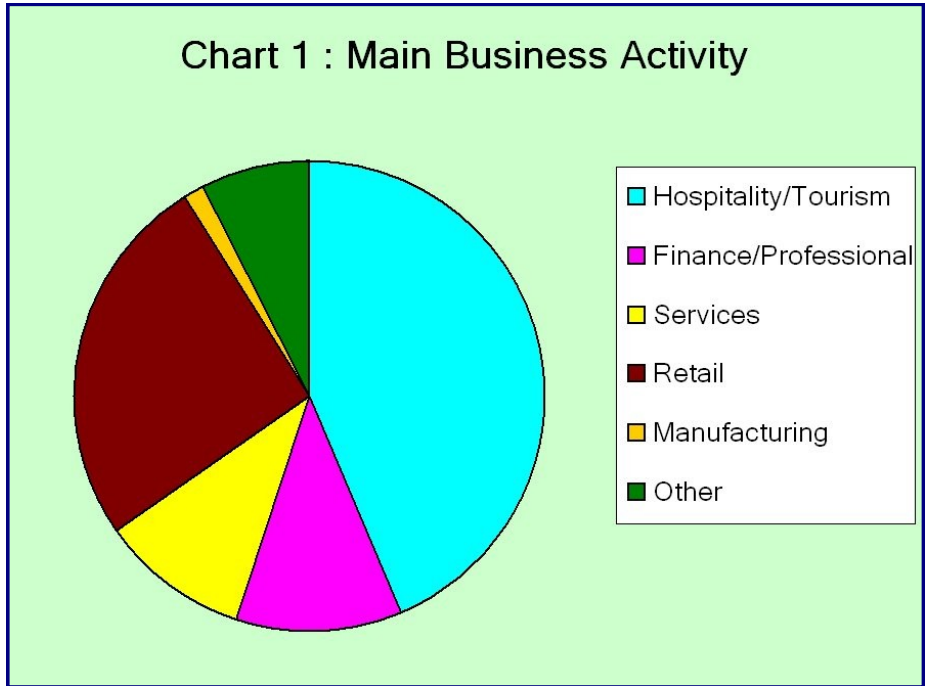
**Location of Business:** 64% of respondents are located within Killarney town, 29% are located outside of Killarney town and 7% are located in both the town and the surrounding area.

**Length of Operation:** The average length of time which the responding businesses have been in operation is 29.4 years, with some businesses in operation over 150 years and one or two in operation for less than a year.

**Main Business Activity:** 43% of those surveyed (See Chart 1) indicate that 'Hospitality / Tourism' is their main business activity, 26% are in Retail, 11.5% are in Finance/ Professional Services, 10% are in general Services, 1.5% are in Manufacturing and 8% indicated that their main business activity is in 'Other' areas such as construction, project management, media, secretarial services etc.

**Ownership of Premise:** 64% own their own premises, 31% rent their business premises and 5% both own and rent their business premises.

**Size of Business:** The respondents to the survey between them employ in the region of 2,600 full-time employees and 2,000 persons who they classify as part-time, casual and seasonal . The high reliance on part-time and seasonal workers is a key feature of employment in Killarney Town and Valley. (See Chart 2) Furthermore, the micro-SME nature of businesses is highlighted by the small number of employees at all levels.



**Importance of Tourism**

**Degree to which Business activity relates to Tourism:** The high dependence on Tourism in Killarney Town & Valley is evident by the fact that all 157 respondents indicate in a general sense their business activity is either 'directly' (45%) or 'indirectly' (37%) related to Tourism (See Chart 3). A further 18% note that their business activity is both directly and indirectly related to tourism.

**Level of reliance on Tourism: Providing more detail on the importance of tourism,** 42% of respondents (See Chart 4) indicate that their business activity level and future well-being is 100% reliant on tourism a further 20% state that they are 75% or more reliant on tourism and 21% are more than 50% reliant on tourism. Hence 83% of businesses are more than 50% reliant on tourism.

**Rent in Killarney**

**Rent Levels:** 71% of respondents felt rent levels in Killarney are either high (44%) or very high (27%) (See Chart 5)

**Rates in Killarney**

**Payment of Commercial Rates:** 65% pay rates to Killarney Town Council, (See Chart 6) 14% pay rates to Kerry County Council, 12% pay rates to both and 9% do not pay any rates. 92% felt commercial rates are either high (27%) or very high (65%) (See Chart 7)

**Value for Money for Rates:** To begin with, 91% of respondents feel that the Rates system is not equitable and 68% feel that rate payers do not receive value for money in terms of local services. However, the following are the comments received when specifically asked to rate value for money in terms of specific services:

- 75% are satisfied with Street Cleaning
- 79% are satisfied with Public Area Landscaping, Presentation & Maintenance
- Only 25% feel they are getting Value For Money from their rates for Public Car Parking



Chart 4 : How reliant business activity & future wellbeing is on Tourism.

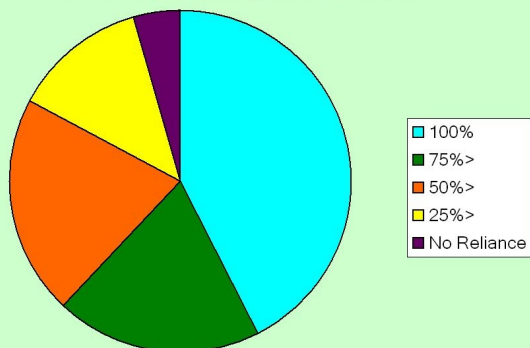


Chart 5 : Opinion of Rent in Killarney



Chart 6 : Who Businesses Pay for Commercial Rates

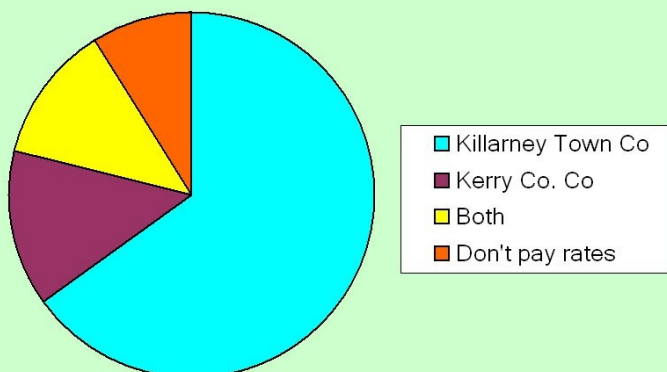


Chart 7 : Commercial Rates are





**Doing Business in Killarney  
(Costs / Finance)**

**Doing Business in Killarney  
(Infrastructure)**

**Operating Costs:** are considered high or very high for labour, insurance and finance cost (**See Chart 8**). Labour costs are seen to be high (46%) or very high (25%) by 71% of businesses. Insurance is considered to be high (46%) or very high (20%) by 66% of companies and 56% of respondents see Finance Cost as high (33%) or very high (23%).

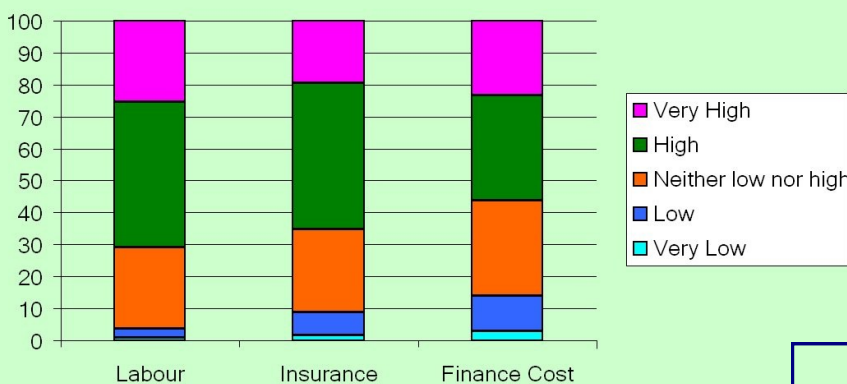
**Availability of Finance:** The availability of finance (**See Chart 9**) is an issue for some businesses. 45% rate availability as either poor (27%) or very poor (18%). However, despite this, some businesses (21%) felt availability was good (and 33% were unable to state if it is good or poor).

**Access to Broadband Services:** 75% of all businesses surveyed indicated that they have access to adequate broadband services. The majority of those who are satisfied are located within Killarney Town.

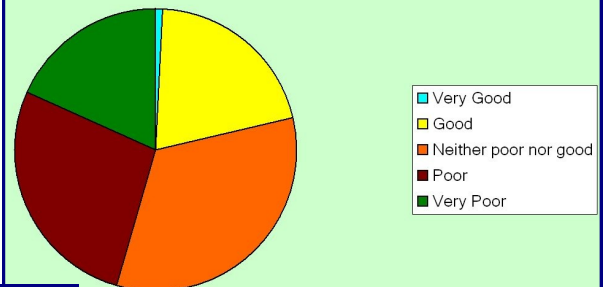
**Rating of Infrastructure:** 44% of respondents felt that access in the area is either good or very good, while 33% feel it is poor or very poor (**See Chart 10**). 28% are satisfied with parking, while 47% are dissatisfied and traffic flow is the least satisfactory with only 24% of respondents feeling it is either very good or good (47% saying it is poor or very poor).

Finally, in relation to Infrastructure, 42% feel parking costs are either 'expensive' or 'very expensive' (**Chart 11**).

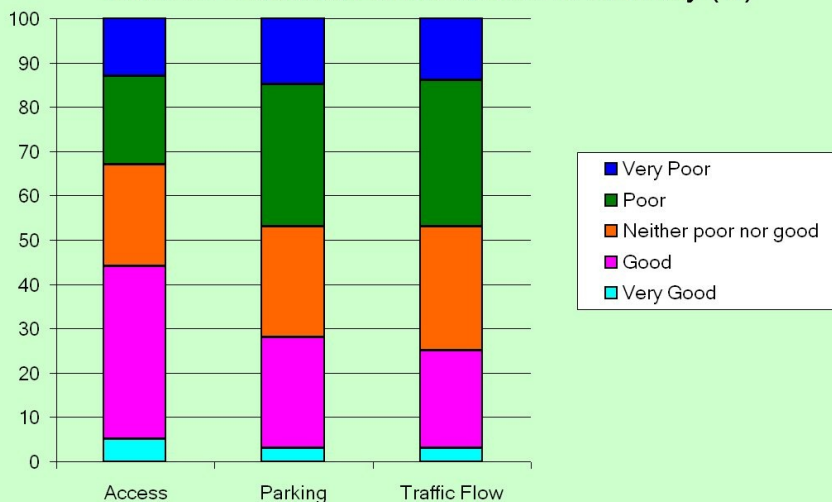
**Chart 8 : Business Operating Costs (%)**



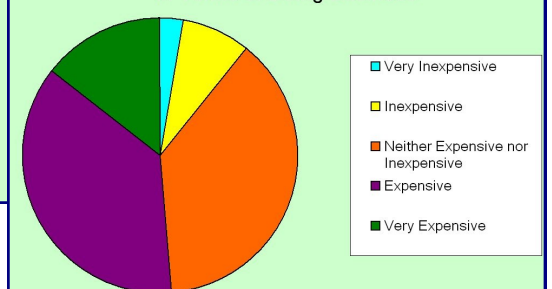
**Chart 9 : Finance Availability for Business**



**Chart 10 : Business Infrastructure in Killarney (%)**



**Chart 11 : Parking Costs, in Terms of Doing Business**



**Sustainable Practices**

**Awareness of Sustainability:** 85% of those who responded indicated their business was familiar with the concept of sustainability (57% familiar & 28% very familiar) (See Chart 12).

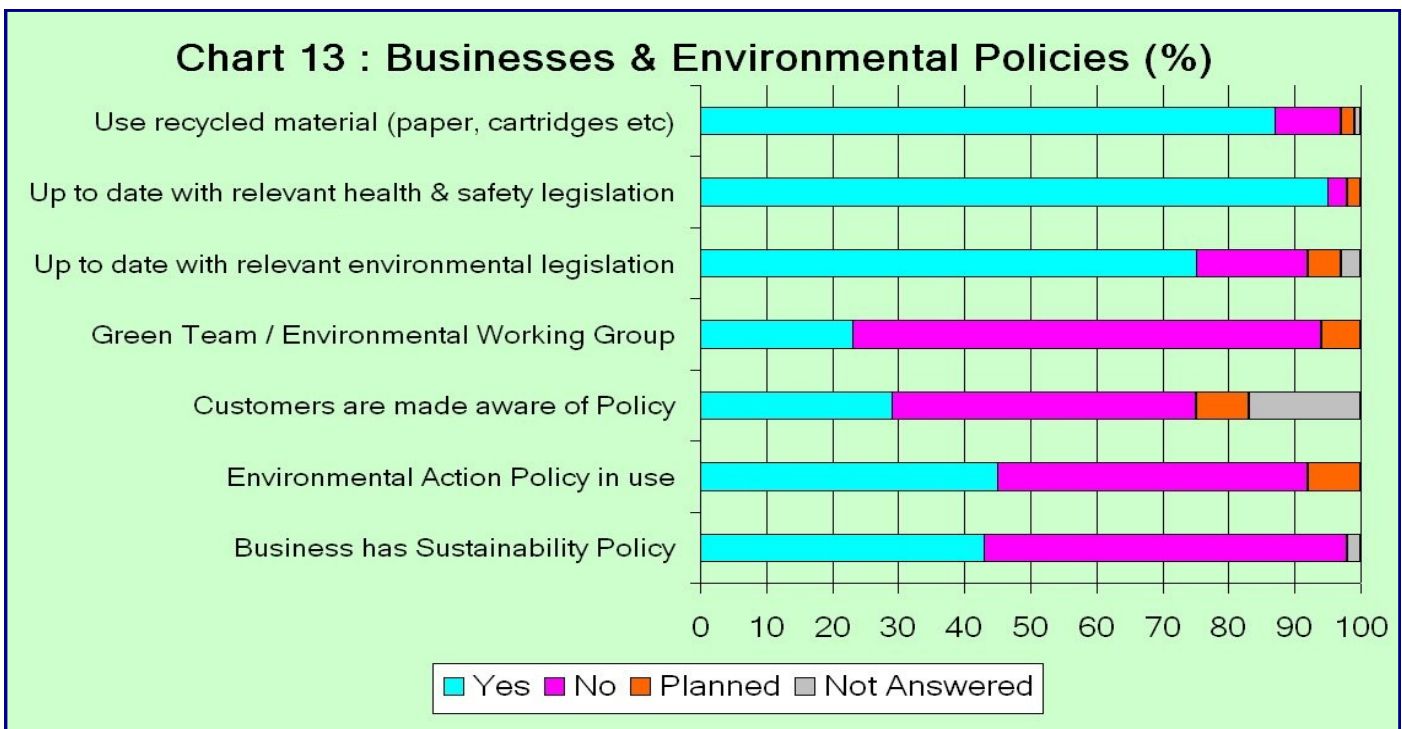
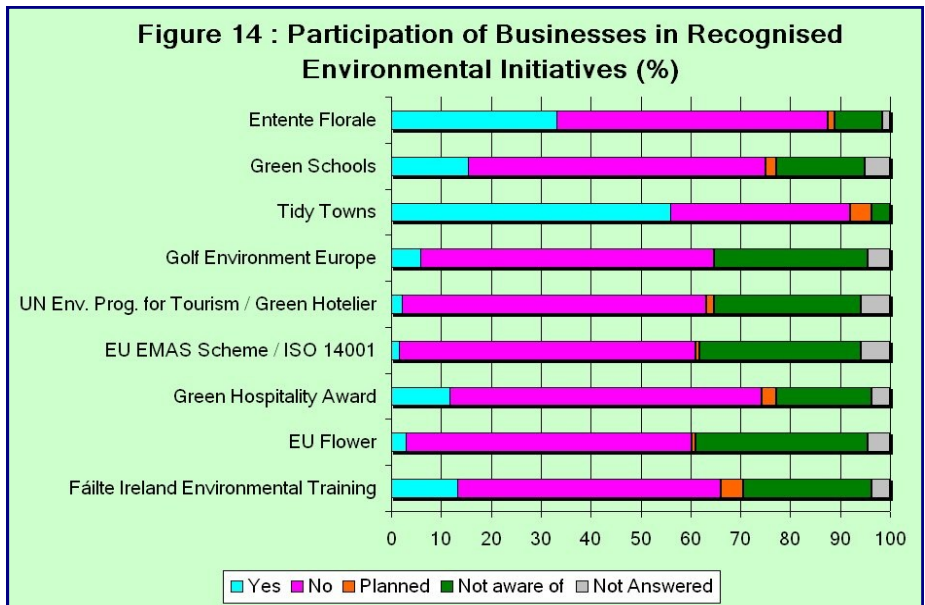
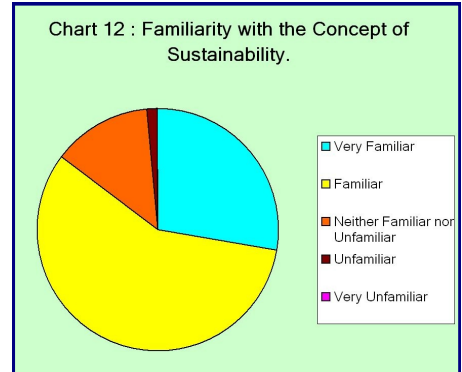
**Sustainable Business Policies:** Despite the strong awareness of sustainability, only 44% admitted to having a sustainability policy for their business (See Chart 13). When asked to provide more specific information pertaining to environmental / sustainable policies, businesses displayed a broad variety of answers. In broad terms respondents seem to be aware of policies etc with 88% claiming to use recycled products such as paper and ink cartridges, and 77% being up to date with relevant environmental legislation. However when practical indicators are examined only 44% have an Environmental Action Policy in use, 35% make their customers aware of such a policy and only 24% have a green team in place.

In contrast businesses were asked to consider Health and Safety legislation, which is strictly enforced - 95% of respondents claim to be up to date in this regard.

**Participation in Recognised Sustainability Initiatives**

**Participation in Recognised Initiatives:** Despite environmental and sustainable awareness, as suggested by Chart 13, there appears to be a very low level of participation, planned participation or awareness of a number of national and European environmental initiatives (See Chart 14). Tidy Towns appears to be the only initiative that more than half of respondents were aware of.

While a number of the listed initiatives are tourism / hospitality specific, but as outlined above 45% of Killarney businesses claim to be directly involved in tourism.



**Environmental Certification / Corporate Social Responsibility**

**Environmentally Friendly Certification:** Only 8% have indicated that their business has been awarded Environmentally Friendly Certification other than that listed on the previous page.

**Corporate Social Responsibility (CSR) :** Only 23% of businesses claim to have a Corporate Social Responsibility Policy. Some of the practices investigated included encouraging staff and customers to use public or other environmentally friendly transport (28% of respondents); and supporting responsible purchasing (42%). (See **Chart 15**). Only 1.5% (2 businesses) have been awarded formal CSR Certification.

**Business Involvement with local Initiatives**

**Involvement with Local Community Activities:** Direct involvement by businesses in some local community initiatives is relatively low. Only 37% of businesses are actively involved with Tidy Towns / Clean-ups, however a further (18%) assist this activity through financial support (See **Chart 16**).

75% are involved with Community Sports Events either through active participation (29%) and/or Financial Support (46%).

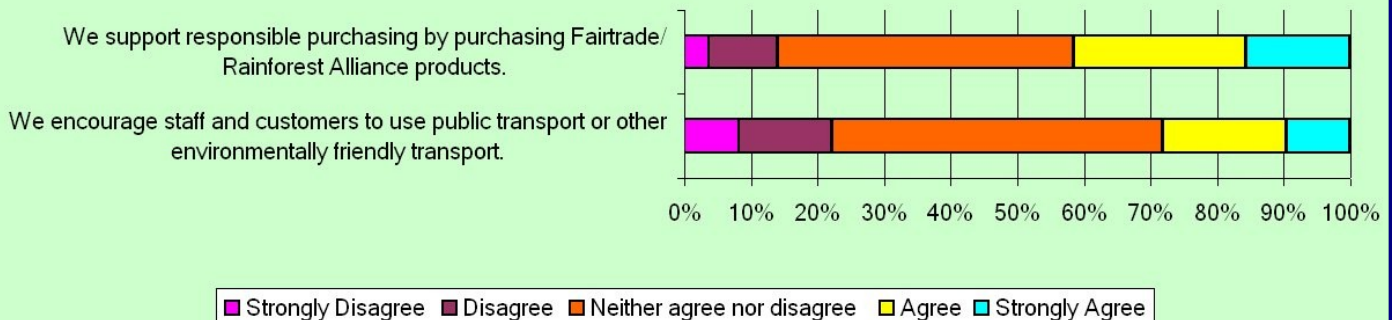
The most supported activity is Community Charities which businesses assist either through active participation (32%) or

Financial Support (52%).

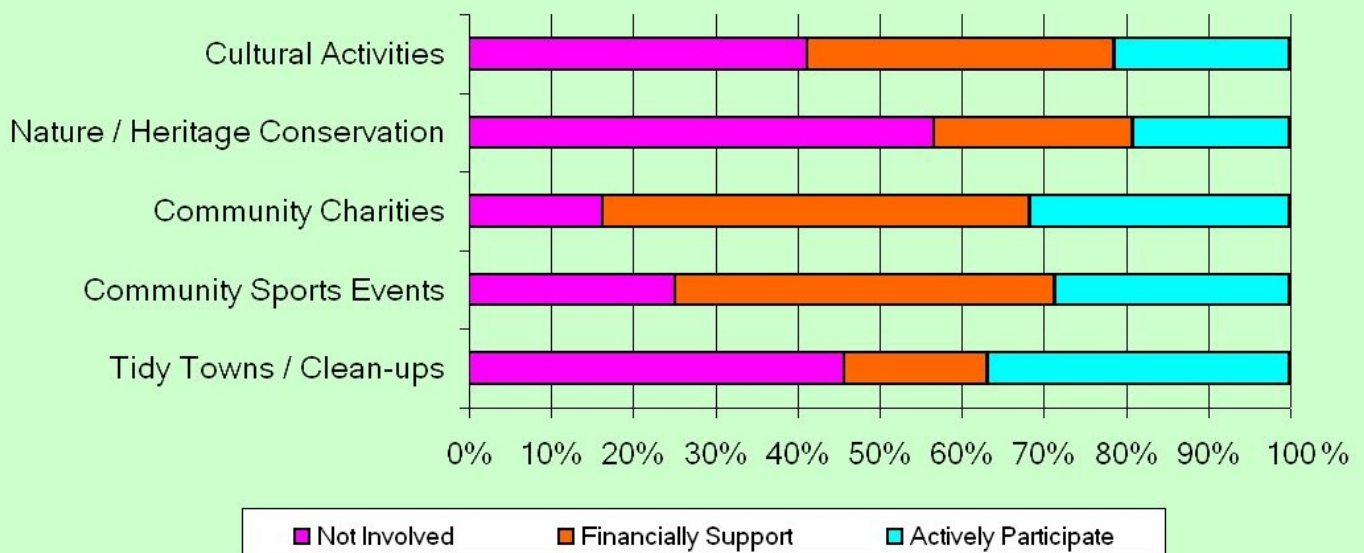
The Level of Support for some other community related activities is quite low. These include Nature / Heritage Conservation which is only supported by 44% of businesses either through active participation (19%) or Financial Support (24%). This means that 57% are not involved in nature / heritage conservation in any way.

59% are involved with Cultural Activities either through active participation (21%) and/or Financial Support (38%). Again, this means that 41% are not involved.

**Chart 15 : Corporate Social Responsibility (%)**



**Chart 16 : Business Participation in Local Community Activities (%)**





**Sustainable Working Initiatives**

When asked about initiatives to demonstrate positive attitudes in the workplace and good treatment of staff, results were highly positive. 91% motivate staff through delegation of responsibility and team work, 89% provide flexible and reasonable work hours, 88% set fair salary levels, 85% comply with, and exceed health and safety measures and 74% provide Continuous development to all staff.

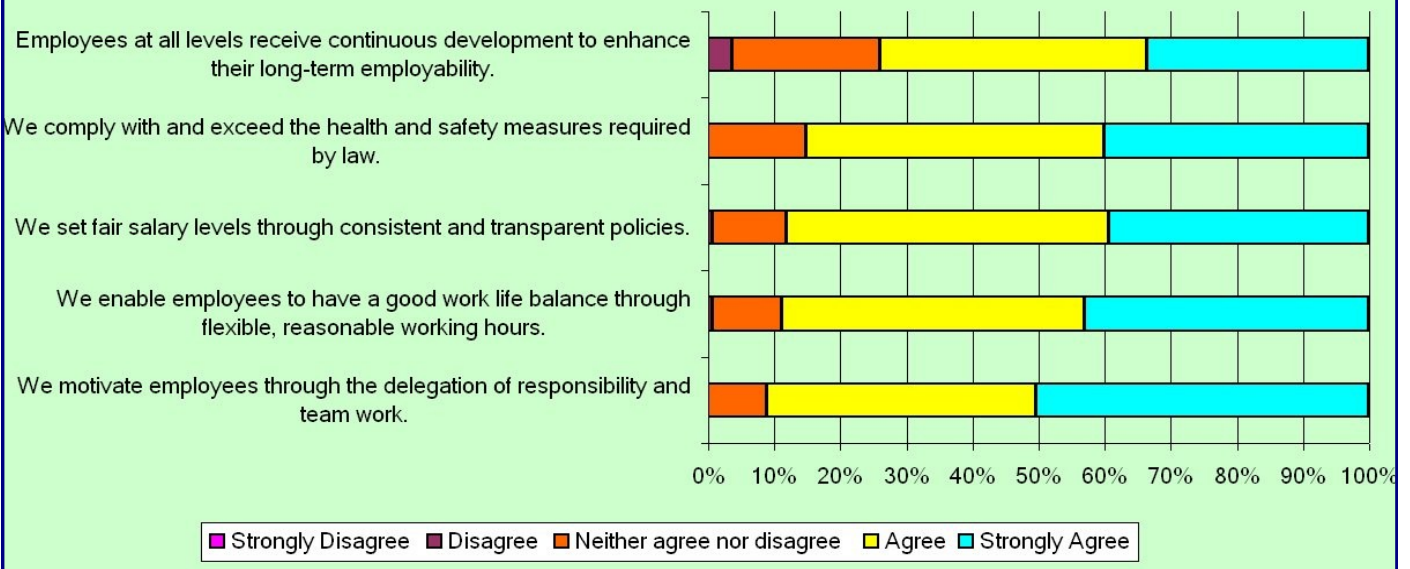
However, in all instances the businesses not actively agreeing with the statements outlined in [Chart 17](#) are somewhat of a concern.



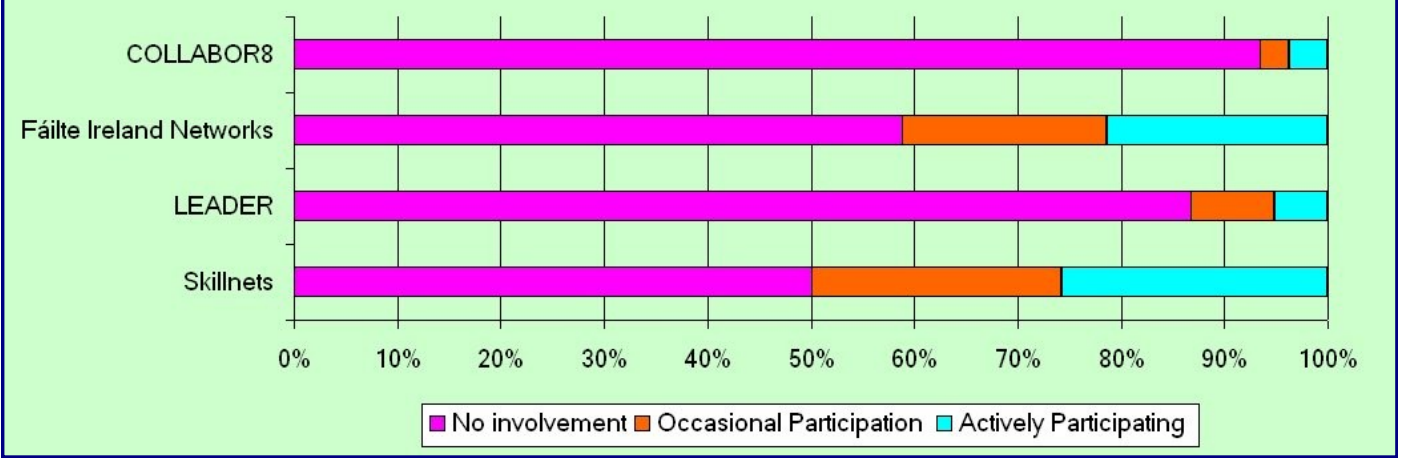
**Partnerships / Networks**

*Involvement with Networks, Local Partnerships, Co-operatives:* is quite low for businesses in Killarney with only 26% actively participating in a Skillnet, 21% with Fáilte Ireland Networks and 4% with COLLABOR8. Only 5% of respondents engage with LEADER. This low level of involvement is influenced by Killarney Town's designation as a Twin-Hub town under the National Spatial Strategy which precludes involvement in such programmes. A further 24% occasionally participate in Skillnets and 20% occasionally with Fáilte Ireland Networks ([See Chart 18](#)).

**Chart 17 : Sustainable Work Initiatives (%)**



**Chart 18 : Business participation in Local Cooperatives / Partnerships (%)**





## 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.

37% of respondents indicated that their business is involved in food preparation / catering. This accounts for 50 businesses. These were then asked to provide more detail on their activities / practices.

90% of these businesses use locally produced ingredients, sourced within a 100km radius. Yet, only 62% of respondents indicated that their customers are advised of this policy.

According to the food businesses 65% of their ingredients are sourced locally and 25% of food businesses source more than 90% of their ingredients locally.

12% of all ingredients are Certified as organic, but this ranges from a number of businesses using as much as 30%-50% organic produce to approximately 30% of food businesses using no Certified organic produce at all.

A number of national sustainable food initiatives are supported by Killarney businesses. These include the 'Just Ask' (35%) campaign, 'Healthy Eating Initiative' (31%) and 'Food for Kids' (41%) (See Chart 19).

## Some final Comments on Treatment of Employees

**Length of tenure:** Businesses in Killarney claim to treat their employees well. This is supported somewhat by the average length of service for employees being 7.2.

**Labour Supply:** 90% felt that Killarney has sufficient skilled labour resources to meet their individual future business needs.

**Investment in People:** 81% of companies provide some form of in-house training (though not for all staff as noted in Chart 17) and facilitate continuous professional development for staff.



## Key Issues to be Addressed

The following are some of the main themes arising in the survey:

### Some key issues of concern which were raised were:

- Rates and return on investment in relation to Rates
- Rent levels
- Access / Parking and associated costs
- The dependence of all business in Killarney on tourism

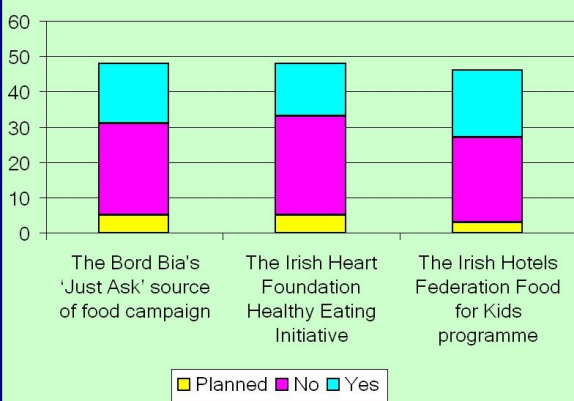
### Some key positive issues which were regularly raised were:

- The quality of the local landscape & buildings
- The work being done in relation to Tidy Towns

### Low Levels of Involvement in some areas are of concern :

- Cultural Initiatives / Nature & Conservation
- Environmental Policy & Initiatives - actions & awareness
- Corporate Social Responsibility
- Networking / partnerships / co-operatives / communication regarding planning

Chart 19 : Support for Sustainable Food Initiatives (number)



For more details about the survey please contact Killarney Chamber of Tourism & Commerce:  
064 66 37928 / [www.killarney.ie](http://www.killarney.ie)