

Report



LUAS “After” Study Employers & Retailers

April - May 2006

By



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TABLE OF CONTENTS

	Page No.
INTRODUCTION	(ii)
KEY FINDINGS	(v)
MANAGEMENT SUMMARY	
<u>1. What if there had not been a Luas?</u>	
1.1 A review of the Control Areas vs the Luas Catchments	1.
1.2 Elements that affect businesses in any area or district	2.
1.3 Overall satisfaction with the area as a good place to work	8.
1.4 Improvements to the area that would have a positive effect	10.
1.5 Impact of traffic and transport issues	13.
<u>2. Awareness of and attitudes towards Luas</u>	
2.1 Awareness of Luas	18.
2.2 Attitudes towards Luas	19.
2.3 Has Luas been advantageous for business?	24.
<u>3. Employer & Retailer profiles</u>	
3.1 Industry Sector	28.
3.2 Length of residency and status of premises	29.
3.3 Company size	32.
3.4 The working day	34.
3.5 Participation in Easi-Travel Plan	39.
3.6 Parking facilities for employees and customers	40.

APPENDICES:	The Questionnaire
	Research Methodology

Introduction

This report presents the findings of a survey of Employers and Retailers carried out on behalf of the Dublin Transportation Office (DTO) by Millward

Brown IMS. This study formed part of the Luas 'After' Study and was conducted in April and May 2006.

Overall Objective of the Survey

Two light rail lines – Luas Green Line (Sandyford to St. Stephen's Green) and Luas Red Line (Tallaght to Connolly Station) – opened in Dublin in 2004. Prior to their becoming operational a 'Before' study was carried out in order to understand travel patterns and transport usage of the general public within the catchment areas of both lines and in a Control Area outside the ambit of the Luas. The 'Before' study also measured the reactions, needs and expectations of the business community in relation to travel and transport in Dublin.

A significant period of operation having elapsed, the DTO commissioned an 'After' study to explore how the Luas has been integrated as part of the Dublin transport system. Specifically in relation to the business community, the research objectives were to measure current perceptions and experiences of Employers and Retailers and to compare these against the benchmark Control Areas and the 'Before' study in order to identify any changes in attitudes and behaviour.

How was the 'After' Survey conducted?

The survey methodology replicated that of the 'Before' study and was conducted across a representative sample of Employers and Retailers in each Luas catchment and in designated Control Areas. While we neither targetted nor specifically excluded companies that had been involved in the 'Before' survey, in fact, based on database information, one quarter of companies had participated in the previous survey. At the end of the interview, companies were asked whether they recollected taking part in the 'Before' study. A somewhat lower 12% stated that they had completed the survey, but the majority (61%) could not remember. It could be possible that a different person within the organisation completed the previous survey. A sample of 80 enterprises was contacted per location, yielding a total sample of 880 businesses over the eleven selected areas. The areas covered in each of the Luas catchments and in the Control Area are listed below.

The survey was conducted by means of telephone interviews with staff members at management level, via the CATI (Computer Aided Telephone Interviewing) Unit located at Millward Brown IMS's Dublin offices. Full details of the survey approach together with a copy of the questionnaire are contained in the Appendices to this report.

The Survey Areas

Luas Red Line	Luas Green Line	Control Areas
Tallaght	Sandyford	Rathfarnham
Kingswood	Dundrum	Drumcondra
Drimnagh	Ranelagh	Lucan
Smithfield	St. Stephen's Green	

Report Format

This report provides an overview of the results of the study, showing comparisons with results for the 'Before' study where appropriate. The main text is prefaced by a summary of Key Findings.

Section 1 reviews the outcome of the survey for the Control Areas versus the Luas Catchments on a range of elements that affect businesses in any area or district. Perceived improvements to the area are discussed and overall satisfaction with the location as place to work is examined. This section also looks at the impact of traffic and transport issues on businesses in the Control Areas versus the Luas Catchments.

Section 2 deals with awareness of and attitudes towards Luas, again from the perspective of the Control Areas versus the Luas Catchments. In a new question for the 'After' Study, the extent to which Luas has been advantageous for businesses is examined.

Section 3 provides contextual background on the businesses surveyed, covering aspects such as industry sector, company size, length of residency in area and status of premises, and details of the working day. This section also looks at participation in the 'Easi-Travel Plan', also known as 'Taxsaver Commuter Tickets' and examines the situation regarding parking for employees and customers.

Key Findings



- ***Awareness of and personal support for the Luas is higher than in the 'Before' study***

The strong support shown by businesses in the 'Before' study in 2004 is reiterated in this 'After' survey. With almost blanket awareness now of both lines (95% versus 78% in 2004), the proportions personally in favour of the Luas have also increased on levels expressed in 2004. Now, more than eight in every ten businesses located in the Luas catchments are personally in favour of the service and almost as many in the Control Areas also endorse the service.

- ***The positive impact of the Luas on ease of travel around Dublin is widely acknowledged***

In the pre-launch study, half of businesses (51%) anticipated that travel around Dublin would be much easier with the advent of the Luas. With the benefit of experience, this aspiration has been realised with a significantly higher proportion (61%) now saying that travel around the city has become easier. Even in the Control Areas, where the impact of the Luas would not be directly felt, businesses are now more likely to laud the improvement in travelling around the city.

- ***But Luas is not seen to have made any significant inroads in easing traffic congestion***

However, the proportion citing easing of traffic congestion as a likely positive effect in the 'Before' study (37%), has not been maintained. In this 'After' study, just one in four businesses (25%) feel that the Luas has had a positive effect in this regard, and those disagreeing with the statement concerning the easing of traffic congestion number almost three in five (56%), compared with just two in five (41%) in the 'Before' study. Comparing the outcome across both Luas catchments, businesses in the catchment of the Green Line tend to be slightly more positive, suggesting that the Luas is

perceived to have had at least some effect on easing traffic congestion. Not so their counterparts in the Red Line catchment, where almost two in three see no improvement. Even in the Control Areas where pre-Luas expectations were inevitably more modest, there has been a fall-off in the proportion saying that Luas has had a positive effect on traffic congestion.

- ***The problem of staff punctuality as a result of inadequate public transport has been eased, however, in both the Red and Green Line catchments***

To put this in context, of the various problems businesses might experience as a result of factors such as traffic congestion and inadequate public transport, problems with recruiting and retaining staff received the lowest level of mention in both the 'Before' and 'After' studies. In contrast, staff punctuality appeared to be a much more pressing issue. While traffic congestion continues to be the major impediment to staff punctuality (mentioned by one in every two businesses in both the 'Before' and 'After' studies), the proportion of businesses attributing this problem to inadequate public transport has declined – down to 34% from 40% in the 'Before' study. Comparing the results for the catchments and the Control Areas, the positive impact of the Luas in this regard is clear; in both the Red and Green Line catchments, problems with staff punctuality resulting from inadequate public transport have waned, whereas in the Control Areas they have increased since the 'Before' study was conducted.

- ***A positive impact on the issue of recruiting and retaining staff is perhaps not as obvious as anticipated***

Another anticipated benefit of the Luas receiving considerable support in the 'Before' study was that it would make it easier for businesses to recruit and retain staff – 39% agreed with this proposition in the run-up to the Luas becoming operational. Hindsight suggests that this benefit has not been as widely realised as was envisaged, with just 27% overall now seeing this as a positive spin-off of the Luas. In the Luas catchments, around one in three businesses appear to have experienced some benefits in this regard, a decline of around ten percentage points on 'Before' study

anticipations. In the Control Areas, pre-Luas expectations have been almost halved, down from 24% to 13% now.

- ***Late deliveries from suppliers a key issue across Luas zones and Control Areas as a result of traffic congestion***

At an overall level, other issues affected by traffic and transport problems, such as late deliveries from suppliers, difficulties for staff visiting customers, and loss of existing/difficulty attracting new customers remain very much at the level seen in the 'Before' study across the Control Areas and Luas catchments. Traffic congestion has undoubtedly had the most negative effect across the board on timely deliveries from suppliers. Comparing the Red and Green Line catchments, however traffic congestion and inadequate parking appear to be less of an issue now for businesses in the Red Line in relation to their staff visiting customers and retaining existing and attracting new customers, whereas for businesses in the Green Line catchment the situation has barely changed since 2004.

The negative effect of traffic congestion is particularly evident among Retailers compared to Employers. Retailers are significantly more likely to mention late deliveries from suppliers and loss of existing customers or difficulty attracting new customers as problems resulting from traffic congestion.

- ***Long-term positive effects of the Luas on business expansion, though not hugely optimistic in the 'Before' study, now appear even less likely than anticipated***

For businesses in the Luas catchments, perceptions regarding more far-reaching effects for businesses, such as expanding the customer base or target market, expanding the existing premises and achieving growth in business as a result of the Luas have shifted to some extent. Since 2004 there has been a fall-off in the proportion optimistic about expanding their customer base (down from 22% to 17%) and growing their business (down from 22% to 13%) as a result of the Luas. As in the 'Before' study, the majority – at least three in every five – see no positive spin-off on these issues. The Control Areas, not greatly optimistic in the 'Before' study, are even less so now.

In terms of employment sector, it is worth noting that reaction tends to be more positive for Retailers, with one in five overall and around one in four in the combined Luas catchments agreeing that the Luas has helped them to expand their customer base or target market. This is in contrast to Employers, just 13% of whom have seen expansion in their customer base or target market. Similarly, Retailers are slightly more likely than Employers to note growth in their business as a result of Luas.

- ***The anticipated effect of the Luas on property and leasing prices has been largely realised with one in every two claiming prices in their area have increased***

In the 'Before' study there was a strong belief that the Luas would cause property and leasing prices in the area to increase for businesses. At that stage, approaching two in every three businesses in the Red and Green Line catchments (64%) envisaged this outcome. In the 'After' study, this perception appears to have become a reality for over half (55%). The true impact of this would depend on whether a premises is owned or leased, as an increase in price could be beneficial for owners of premises (increasing the value of their capital asset), but obviously disadvantageous for those leasing. Specifically for those leasing, the size of the increase, their ability to pay and its effect on profitability could have an impact on the viability of remaining in the premises. In the Control Areas, a quite substantial proportion of businesses (36%) believe that their property and leasing prices have increased as a result of the Luas. However, one could surmise this view emanates from a perceived increase in purchasing and leasing prices in the property market generally, with some additional impact as a result of the advent of the Luas, culminating in an indirect as opposed to a direct effect on their own situation.

- ***One in every four businesses overall and a higher three in every ten located in the Luas catchments believe Luas has been advantageous for their business. Businesses in the Green Line catchment are the most positive***

Asked whether the Luas had been advantageous or not for their business, around one in three businesses located in the Green Line

catchment (32%) and one in four in the Red Line (26%) agreed that it had. In the Control Areas a more modest one in ten (11%) noted a positive spin-off. Overall, Retailers were slightly less likely than other Employers to see Luas as advantageous (21% versus 25%).

- ***Easier and better access for customers and clients was the topmost advantage for Red Line businesses. On the Green Line, facilitating staff in getting to work was the main advantage***
For Red Line businesses, the top ranking advantage of the Luas was that it provided easier and better access for customers and clients (31% mentioned this compared with 20% for Green Line businesses). In the Green Line catchment, the fact that Luas made it easier for staff to get to work was the most widely reported advantage (31% versus 19% for Red Line businesses). Green Line businesses were also more likely to mention better access to the city centre and convenience as advantages of the service.

Specifically in the Retail sector, for those who considered Luas had been advantageous for their business, easier and better access for customers/clients (33%) came in well ahead of other advantages and was also more widely mentioned than among Employers (26%). Retailers were also much more likely than other employers (17% versus 4%) to mention acquiring new customers and broadening their customer base as a benefit of Luas.

- ***In both catchments and, inevitably, in the Control Areas distance from the Luas is the main reason why it is not advantageous***

While a significant number of businesses felt unable to comment one way or the other, around three in ten in both Luas catchments did not see any particular advantages for their business. In both catchments distance from the Luas was the primary reason why the service was considered to be not advantageous. Bearing in mind that all businesses contacted in the Luas zones were within a one kilometre radius of the service, distance from the service was most likely to be an issue for those located on the outer rim of the one kilometre radius.

Distance from the Luas was a particular factor for those in the Retail sector who did not see any advantages as a result of Luas (62% versus 50% for Employers). Specifically in the Luas catchments one in two Retailers who had not found Luas advantageous put this down to distance from the service. Retailers were also more likely than average to mention the Luas taking customers away from their area as a drawback (7% versus 1% for Employers).

Businesses in the Red Line catchment were much more likely than their Green Line counterparts to say that their type of customer did not use the Luas (12% versus 3%), probably reflecting the nature of businesses in the area, with a greater preponderance in the wholesale, manufacturing and distribution sectors.

- ***Satisfaction with access to and from the city centre has improved significantly***

Reviewing the various elements that affect businesses in any area or district, the 'After' study reveals significant improvement in satisfaction with access to and from the area and the City Centre. Businesses located in the Green Line catchment are particularly positive in this regard. Satisfaction with access to and from the area and nearby areas has also improved significantly for Green Line businesses. In contrast, satisfaction with City Centre and local access for businesses in the Control Areas is down significantly.

- ***But satisfaction with the area regarding the level of traffic congestion and traffic pollution at best remains tenuous and improvements to the level of traffic congestion remain the top priority for businesses***

Little change in satisfaction levels regarding traffic congestion and traffic pollution corroborates the view that the pre-launch expectations of businesses regarding the contribution of the Luas to easing traffic congestion may have been over-optimistic. While Luas is not perceived to have delivered as well as might have been anticipated in easing these problems, it is undoubtedly tacitly accepted by businesses that the Luas alone could not work miracles and that other initiatives would be needed. Indeed, in looking at improvements to an area that would have a positive effect on

business, tackling the issue of traffic congestion is even more widely mentioned in this 'After' study (up from 37% in 2004 to 44% now) and far outweighs other perceived improvements. In particular, for businesses located in the Red Line catchment, the need to tackle traffic congestion has assumed significantly greater importance than in 2004 (43% now versus 32% in the 'Before' study).

- ***Perceptions of the area as a good place to work have improved slightly in both Luas catchments, but have disimproved in the Control Areas***

Despite some problems, notably traffic congestion, crime levels and cost of leasing or purchasing space, the vast majority of businesses are satisfied with their location as a good place to work. Satisfaction has improved for both Luas catchments, but remains significantly lower for Red Line businesses than for their counterparts in the Green Line area (68% versus 83% satisfied). In contrast, satisfaction is down slightly for businesses in the Control Areas, from which it could be inferred that, among other things, the absence of a Luas service has precluded a growth in satisfaction.

For Retailers in the Red Zone, overall satisfaction with the area has increased from 61% in 2004 to 71%. Retailers in the Green Line zone are the most satisfied overall with their area (86%).

Management Summary

1. WHAT IF THERE HAD NOT BEEN A LUAS?

1.1 A Review of the Control Areas versus the Luas Catchments

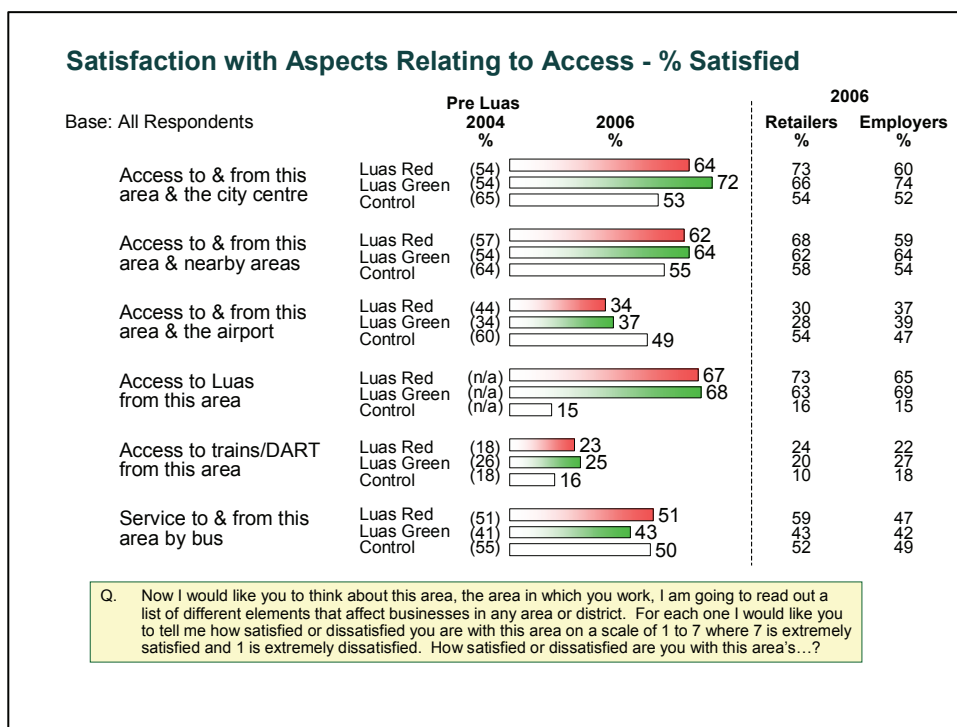
The Control Areas included in the survey – Drumcondra, Rathfarnham and Lucan – enable us to assess business perceptions of travel and transport in a scenario where the Luas does not have any direct impact.

By comparing the results for the Control Areas for the ‘Before’ and ‘After’ studies we can see to what extent transport issues impinge on the day to day activities of businesses and deduce whether the situation is improving, static or growing more difficult. This, in turn, provides a backdrop against which to assess the impact of the Luas in its catchment areas.

Note: We can also examine the impact of Luas by comparing attitudes pre and post launch but it should be borne in mind that the pre-launch survey conducted in 2004 captured the hopes and expectations of businesses and were as such, speculative and prone to under or over-emphasis, depending on the perceptions of businesses and the extent of their knowledge of Luas at that time. In 2006, with Luas in operation for nearly two years at the time of the survey, results are based on solid experience and so benefit from a sense of realism that would not have been possible in 2004.

1.2 Elements that Affect Businesses in Any Area or District

Access Issues



Turning first to the factors that affect businesses in any area or district, the most notable change since 2004 is the deterioration in satisfaction with access to and from the City Centre among businesses in the Control Area. Whereas in the pre Luas study, businesses in the Control Areas were the most positive regarding access to the City Centre, satisfaction has declined in the intervening two years, down from 65% in 2004 to 53% now. This is in marked contrast to both Luas catchments, where satisfaction with access to the City Centre has grown, particularly significantly for businesses located on the Green Line. As a consequence, businesses in the Control Areas now lag behind those in the Luas catchments on this aspect.

Satisfaction with access to and from local areas also shows that the Luas has benefitted those in its catchments, in contrast to businesses in the Control Areas.

These results suggest that for those areas **not** served by the Luas, the situation regarding access both to the City Centre and locally is becoming more rather than less problematic.

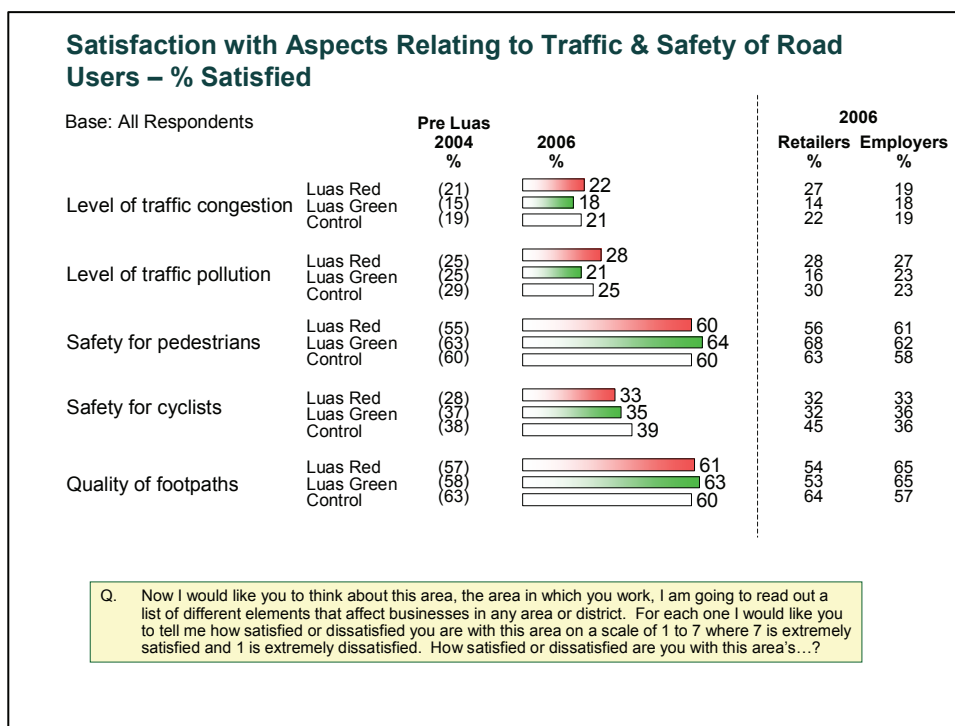
Comparing the overall outcome for Retailers versus Employers, satisfaction with the various aspects of access are generally consistent for both sectors, with those in the Luas catchments more positive regarding most aspects of access than are their counterparts in the Control areas. Specifically, Retailers on the Red Line tend to be more satisfied than Employers with access to and from the City Centre (73% versus 60%), to and from their area and nearby areas (68% versus 59%) and access to Luas (73% versus 65%). In the Green Line zone, Employers show the highest level of satisfaction with access to and from the City Centre (74% versus 66% for Retailers).

Focusing on other aspects of access that impact on businesses, in the Control Areas overall satisfaction with access from the local area to and from the airport stands at 49% ahead of both the Green Line (37%) and the Red Line (34%). In the Control Areas overall satisfaction is influenced by a strong positive reaction from businesses located in Drumcondra. Leaving this area out of the equation, the reaction of businesses in the other Control Areas (Lucan and Rathfarnham) is very much in line with businesses in the Luas catchments. These results suggest that Luas is unlikely to have been factored in as contributing to easier airport access, with businesses more likely to think of direct access with no mode change, as opposed to multi-mode ways of access. On a different but related note, across the Luas catchments, businesses in Sandyford show the highest level of satisfaction with this aspect of their area, perhaps reflecting the benefits of the extension of the private Aircoach service to the Sandyford area in addition to linkage to the M50.

Regarding access to Luas, businesses in the Control Areas, particularly those located in the Lucan catchment, obviously displayed very low levels of satisfaction. While the majority – two in every three of those in the Luas catchments – were satisfied, one in four were dissatisfied, perhaps a result of their physical distance from a Luas stop?

In the Control and Luas catchments, satisfaction with access to trains/DART is modest, but is significantly lower in the Control areas than the Luas catchments. Satisfaction with bus services does not differ greatly between the Control area (50%) and Luas catchments (47%).

Traffic and Road Safety



In 2004, pre-Luas, the level of satisfaction with various aspects of traffic and road safety did not differ greatly between businesses in the Control Areas and in the Luas catchments.

In the Control Areas at that stage, perceptions of issues such as traffic congestion, traffic pollution and safety for cyclists were quite negative, with dissatisfaction considerably outweighing satisfaction. However, safety for pedestrians and quality of footpaths achieved a more satisfactory rating. Post-Luas, this situation has not really changed. Despite a marginal increase in satisfaction with the level of traffic congestion, opinion remains overwhelmingly negative. Of the three districts in the Control Areas, Rathfarnham does show some improvement (up from 24% to 34%) which could reflect the impact of the M50 in diverting a certain level of through traffic from the area. However, this improvement is not statistically significant.

In relation to the level of traffic pollution, satisfaction among businesses in the Control Areas has declined by four percentage points. Satisfaction with quality of footpaths has also fallen back slightly. All of this suggests that in the intervening period since the Benchmark Study, these traffic and safety

issues have not really improved to any significant extent for businesses in the Control Areas.

But what of developments in the Luas catchments? While the advent of the Luas may not have had any perceptible impact on traffic issues in the Control Areas, expectations for the Luas catchments would have been for some improvement, but this does not seem to have been delivered to any notable extent. The impact of Luas on traffic congestion appears to have been, at best, marginal, with satisfaction with this aspect of the local area very low in both Luas catchments. Indeed it is significant that, overall, the Luas catchments did no better than the Control Areas regarding satisfaction with the level of traffic congestion in their local area, suggesting that the positive impact on traffic that the advent of the Luas presaged has not yet materialised to the extent that might have been anticipated.

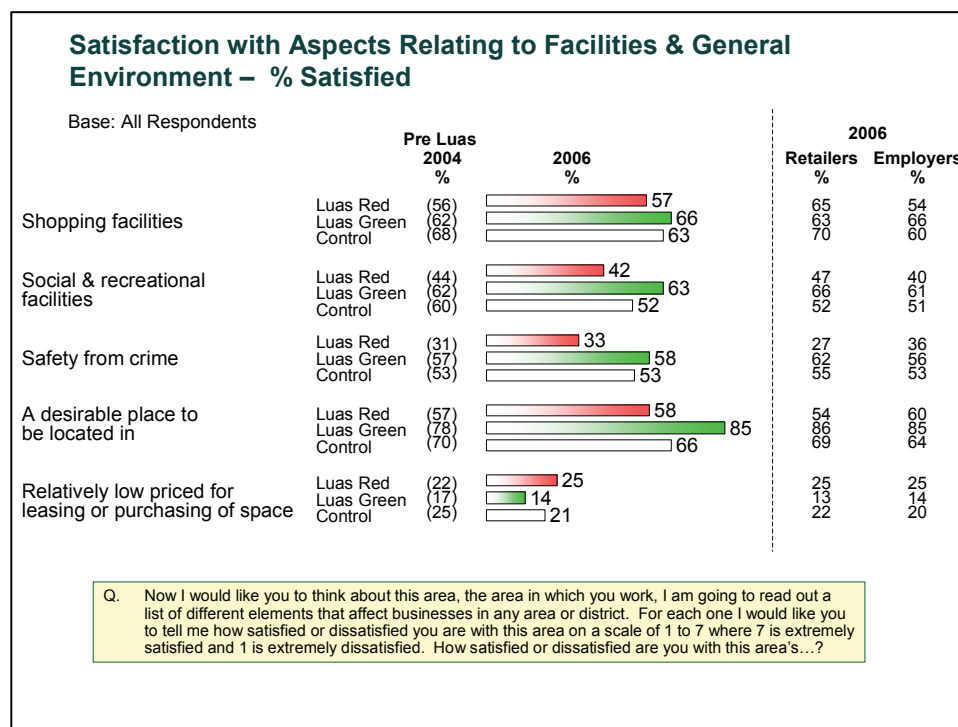
Of the individual Luas catchment areas, Dundrum sees the biggest increase in satisfaction with the level of traffic congestion (up from 24% in 2004 to 31% now). Though not statistically significant, this does suggest an improved perception that may result from a combination of the arrival of Luas and the development of the M50.

Looking at other aspects of traffic and road safety, traffic pollution, the bedfellow of traffic congestion, continues to warrant a high level of dissatisfaction in both the Control Areas and the Luas catchments. The Luas Red Line registered a very slight improvement in satisfaction levels in 2006, but this was not the case for the Green Line, where the already quite low level of satisfaction declined further. Though satisfaction is low in both Luas catchments, the Red Line is significantly ahead of the Green Line in this regard (28% versus 21%).

Regarding satisfaction with safety for pedestrians and cyclists, there is little difference in attitude between the Control Areas and the Luas catchments. Whereas safety for pedestrians and cyclists may have been of concern in the run-up to the Luas, results in 2006 seem to indicate that there has been no perceptible negative fall-out regarding these aspects of road safety. That said, safety for cyclists obviously remains an issue, with dissatisfaction continuing to outweigh satisfaction across many areas.

Satisfaction with quality of footpaths is marginally ahead of the Control Areas in both Luas catchments.

Facilities and General Environment



Across the range of aspects measured under this heading, change in satisfaction levels, on the whole, was slight. In the Control Areas satisfaction levels were slightly lower across all the dimensions measured, with the exception of safety from crime which was unchanged since 2004. (This is in contrast to the Luas catchments where a marginal upward movement in satisfaction on most aspects was noted). To what extent this fall-off in satisfaction in the Control Areas can be attributed directly to a 'Luas lack' is certainly questionable, although one would have to assume that, even if the impact of the Luas is regarded as peripheral to an organisation, its very presence in an area at the very least has a positive psychological benefit. In this respect, the Control Areas could be considered disadvantaged and this is perhaps borne out by an overall downward movement in satisfaction with the area as '*a desirable place to be located in*', compared with an upward trend for the Luas catchments, the Green Line catchment in particular.

On a different note, the strong satisfaction rating of desirability of the location juxtaposed with the quite high level of dissatisfaction with the location as low priced for leasing or buying space across both the Control Areas and the Luas catchments suggests that there is no real expectation that prices will be low, regardless of where the business is located.

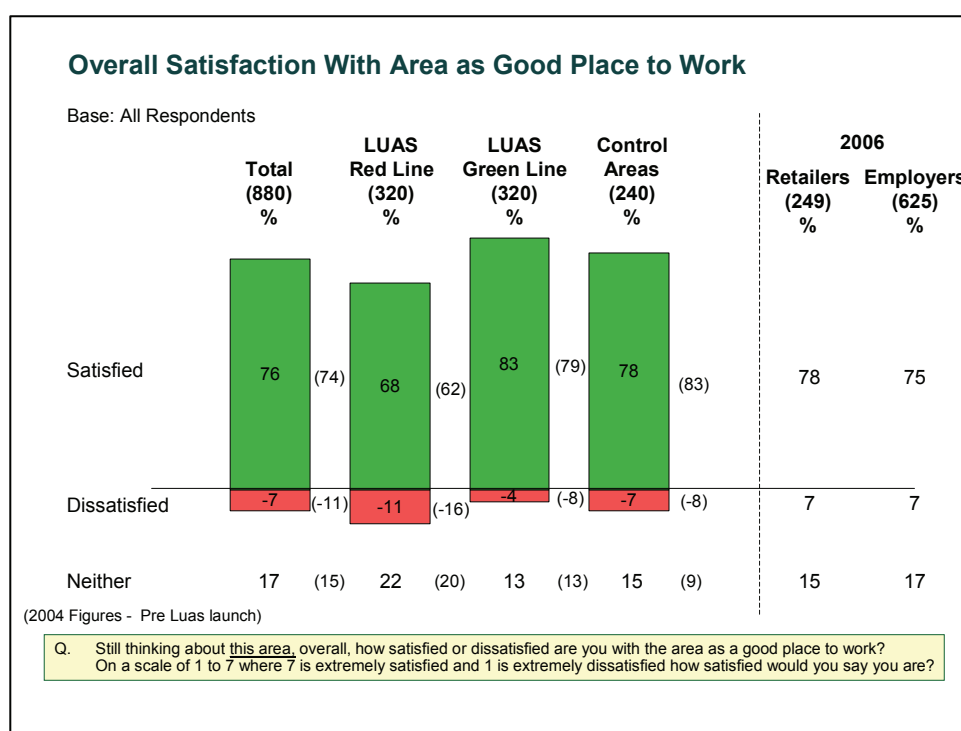
In the Control Areas a slight downturn in satisfaction was seen for both the desirability of the location and perceptions of it as relatively low priced. In the Luas catchments, in particular the Green line catchment, satisfaction with desirability of the location improved this year but so did dissatisfaction with leasing or purchasing prices. Shifts in attitude were less evident, however, for businesses in the Red Line catchment, where satisfaction with the desirability of the location was more or less static while satisfaction with leasing/purchasing prices improved marginally since 2004.

While the Luas has undoubtedly had a positive impact on desirability primarily, it seems, for businesses located along the Green Line catchment, it is probably unrealistic to expect that businesses located in the Luas catchments could ever hope to achieve a better price for renting/purchasing. What could ultimately be at issue for some businesses is whether it would be economic to remain at a particular location should leasing/purchasing prices become even more prohibitive.

Businesses located in Ranelagh in a sense could be viewed as a 'test case' in that results for this year show a significant increase in the proportion '*extremely dissatisfied*' with leasing/purchasing prices (up from 16% pre-Luas to 45% now), perhaps reflecting high prices close to the City Centre which have probably been pushed up even further with the advent of the Luas. Comparing these results with Drumcondra – an area also close to the City Centre – the proportion extremely dissatisfied with leasing/purchasing prices has also grown (up from 13% to 25%) though not as dramatically as in Ranelagh. This would suggest that while proximity to the city centre has an impact, the arrival of Luas in Ranelagh has fuelled perceptions of the area as expensive for leasing/purchasing of space.

1.3 Overall Satisfaction With the Area as a Good Place to Work

Across all the businesses surveyed in both the Control Areas and the Luas catchments, overall satisfaction with the area as a good place to work continues at a high level. However, the movement in opinion since 2004 reveals an interesting if not unpredictable trend. Businesses in the Luas catchments are now even more satisfied with their area overall but for those in the Control Areas, satisfaction, though still strong, has diminished somewhat. Thus, from being the leader on this measure in 2004, the Control Areas now come second to the Green Line catchment.



A review of the individual locations in the Control Areas reveals a significant loss in favour for Lucan, where the proportion of businesses satisfied with their area as a place to work has declined from 89% in 2004 to 73% now. In contrast, opinion among those located in Drumcondra and Rathfarnham has not changed to any significant extent. Undoubtedly the factor most affecting businesses located in Lucan is that of access, both to the City Centre and to local areas. In each case satisfaction has plummeted since 2004, whereas in the other Control Areas, Drumcondra and Rathfarnham, change in attitude has been relatively slight. Furthermore, while traffic congestion is a problem across all three areas, it seems to have been

exacerbated in the Lucan area, with 85% of businesses now dissatisfied with this aspect of their area compared to 65% in 2004.

In the Luas catchments, overall satisfaction with their area among businesses located on the Green Line is significantly ahead of the response of businesses on the Red Line (83% versus 68%). Of the individual districts in the Luas catchments, Dundrum showed the most significant increase in overall satisfaction, up from 73% in 2004 to 93% now, a result presumably influenced by the convergent development of the Luas and the M50, and the Dundrum Town Centre Shopping Complex. Other areas with improved satisfaction levels were Drimnagh and Smithfield, though the upturn in attitudes is not statistically significant.

Comparing trends in overall satisfaction between the Control Areas and the Luas catchments, the obvious conclusion is that the advent of the Luas has been beneficial for businesses located within its catchments. Without the service and its positive effect in improving access to the city, it is likely that the downward trend in satisfaction noted in the Control Areas would have been mirrored in the Luas catchments.

In the Retail sector overall, 78% of businesses are satisfied with their area as a good place to work, very much in line with other Employers (75%). For Retailers in the Red Zone, overall satisfaction with the area stands at 71% compared with 86% for Retailers in the Green Line zone. While the majority of Employers in both zones are also satisfied with their area, levels of satisfaction are slightly below those expressed by Retailers, with 66% of Red Line and 81% of Green Line Employers satisfied.

1.4 Improvements to Area that Would Have a Positive Impact on Businesses

Employers and Retailers were asked to single out the **one** improvement to their area that would have the most impact on their business. Mirroring the high level of dissatisfaction with this aspect in their local area, the dominant improvement envisaged across all of the areas surveyed, whether in the Control or Luas catchments, was a reduction in traffic congestion. Indeed, at an overall level, traffic congestion receives a significantly higher mention now than in 2004 (44% versus 37% pre-Luas). Growth in mention is most notable for businesses located in the Red Line catchment (up from 32% in 2004 to 43% now), but is only marginally higher since 2004 in the Green Line catchment (44% versus 41%).

The table below shows improvements that would have the most positive impact, ranked in order of importance on the basis of total responses across the Luas zones and the Control Areas.

Improvements to Area with <u>Most Positive</u> Impact – Compared Across the Catchments							
Base: All Respondents							
	LUAS Red Line (320)		LUAS Green Line (320)		Control Areas (240)		2006 Retailers (249) Employers (625)
	%		%		%		%
Level of traffic congestion	43	(32)	44	(41)	47	(39)	41 46
Access to Luas from this area	4	(n/a)	8	(n/a)	13	(n/a)	7 8
Service to/from area by bus	5	(8)	8	(7)	9	(8)	6 8
Safety from crime	11	(14)	3	(3)	3	(6)	11 4
Level of traffic pollution	3	(5)	4	(6)	5	(3)	4 3
Access to/from area & city centre	4	(7)	3	(8)	3	(4)	3 4
Access to/from area & nearby areas	3	(4)	3	(6)	3	(4)	4 3
Shopping facilities	5	(3)	4	(2)	1	(1)	5 3
Social and recreational facilities	4	(3)	1	(3)	5	(2)	3 3
Access to trains/DART from area	3	(4)	2	(5)	3	(11)	2 3
Access to/from area & Airport	1	(1)	4	(2)	1	(1)	2 3
Safety for pedestrians	1	(3)	2	(-)	*	(1)	* 2
Quality of footpaths	2	(2)	2	(2)	*	(4)	2 1
Safety for cyclists	2	(1)	2	(1)	1	(2)	1 2

(2004 Figures - Pre Luas launch)

Q. Thinking about all the aspects of this area that I have just asked you about. If one of these aspects could be improved, which **one** would have the most positive effect on your business?

Q. And **which others** would have a very positive impact on your business if they were improved?

Mention of improvements to traffic congestion as potentially the most positive step has grown by eight percentage points among businesses in the Control Areas. Although this is not significant statistically, it does have the effect of pushing businesses in the Control Area into the lead position in

terms of identifying traffic congestion as the most in need of attention in their area, in contrast to 2004 when businesses in the Green Line were to the forefront in this regard.

In the Control Areas, businesses in the Lucan district appear to have been particularly affected by traffic congestion problems in the intervening period since the pre-Luas study, with 68% now mentioning this as the most important improvement for their area compared with 51% in 2004.

Of the individual areas in the Red Line catchment, mention of traffic congestion is up significantly since 2004 for businesses in Kingswood and Smithfield. In the Green Line catchment, Dundrum businesses are less likely now to mention traffic congestion (35% versus 46% in 2004).

Looking at the top five improvements (including all mentions), traffic congestion obviously remains at the head of the list by a long margin and again is most widely mentioned by businesses in the Control Areas. This apart, across all areas covered in the survey, most other suggestions relate to transport services, be it access to Luas, mentioned by one in every five (20%) or trains/DART (15%), or services to/from the area by bus (18%).

Improvements to Area that Would Have a Positive Effect on Business – Top Five

Base: All Respondents

	Improvements with <u>most positive</u> impact on business %		Other Improvements with <u>very positive</u> impact on business %		Total mentions %		2006 Retailers % Employers %	
Level of traffic congestion	44	(37)	10	(14)	54	(51)	52	54
Access to Luas from this area	8	(n/a)	13	(n/a)	20	(n/a)	18	21
Service to/from area by bus	7	(8)	11	(13)	18	(20)	15	19
Safety from crime	6	(8)	5	(10)	11	(18)	16	9
Access to trains/DART from area	2	(6)	13	(15)	15	(21)	15	15

(2004 Figures - Pre Luas launch)

- Q. Thinking about all the aspects of this area that I have just asked you about.
If one of these aspects could be improved, which one would have the most positive effect on your business?
- Q. And which others would have a very positive impact on your business if they were improved?

Demonstrating a keen perception of the advantages of Luas, one in every eight businesses in the Control Areas believe that access to the Luas from their area would have **the most positive effect** on their business and one in three overall see this as one of the factors that would improve their lot. Interestingly, mention of safety from crime as a potential improvement has decreased since 2004 across all areas, though it still remains a notable issue for districts such as Tallaght and Smithfield.

Comparing the results for Retailers and Employers, the most significant difference between the two sectors is in relation to safety from crime, with Retailers almost twice as likely as Employers (16% versus 9%) to note this as a potential improvement for their area.

1.5 Impact of Traffic and Transport Issues on Businesses in the Control Areas versus the Luas Catchments

Reactions to issues such as traffic congestion, public transport and parking facilities were measured in order to assess how they affected businesses over the past twelve months. The overall response to each of the issues is shown in the chart below, again highlighting the impact of traffic congestion across the range of issues measured, particularly in relation to staff punctuality and late deliveries from suppliers. The third most widely mentioned negative was the difficulty experienced by an organisation's staff when visiting customers.

% Affected by Traffic Congestion, Inadequate Public Transport & Insufficient Parking on Business in Past 12 Months						
Base: All Respondents						
	Traffic Congestion (880) %		Inadequate Public Transport (880) %		Insufficient Parking (880) %	
Problems with staff punctuality	49	(49)	34	(40)	n/a	(n/a)
Problems with retention/recruiting staff	17	(17)	15	(15)	14	(8)
Late deliveries from suppliers	46	(45)	n/a	(n/a)	n/a	(n/a)
Difficulties for staff visiting customers	35	(38)	n/a	(n/a)	n/a	(n/a)
Loss of existing/difficulty attracting new customers	28	(29)	18	(18)	20	(23)
Difficulty interacting with customers	n/a	(n/a)	n/a	(n/a)	22	(23)
None of these	21	(18)	56	(48)	67	(65)

(2004 Figures - Pre Luas launch)

Focusing on the effect of **traffic congestion** in each of the survey areas, this seems to have had a marginally greater adverse impact than in 2004 for businesses in the Control Areas on issues such as *staff punctuality* and *late deliveries from suppliers*. Those located in Lucan appeared to experience the greatest deterioration in *staff punctuality* since 2004, with 56% of organisations now mentioning this as the downside of traffic congestion compared with 41% in 2004. Businesses in Lucan were also more likely to be affected by *late deliveries from suppliers*, as were those in Drumcondra.

Although businesses located in the Luas catchments remain the most affected by problems with *staff punctuality* as a result of traffic congestion, these latest results do not show any deterioration in this regard.

Whereas in 2004, there was little difference between the Control Areas and the Luas catchments in the proportions mentioning *loss of existing or difficulty attracting new customers* as a casualty of traffic congestion, in 2006 the Control Areas are now the most afflicted, while businesses in the Luas catchments have experienced a marginal easing of this difficulty.

% Affected by Traffic Congestion – Compared Across the Catchments					
Base: All Respondents					
	LUAS Red Line (320) %	LUAS Green Line (320) %	Control Areas (240) %	2006 Retailers (249) %	2006 Employers (625) %
Problems with staff punctuality	51 (50)	50 (53)	45 (42)	47	50
Problems with retention/recruiting staff	18 (18)	18 (18)	13 (14)	18	16
Late deliveries from suppliers	48 (50)	47 (43)	44 (41)	54	44
Difficulties for staff visiting customers	35 (39)	37 (38)	34 (35)	33	37
Loss of existing/difficulty attracting new customers	26 (31)	25 (27)	34 (30)	40	23
None of these	18 (13)	22 (18)	23 (24)	17	22

(2004 Figures - Pre Luas launch)

Q. Some businesses in Dublin have been affected by traffic congestion, while others have not. Which of the following has happened in your business as a result of traffic congestion within the past 12 months?

The negative effect of traffic congestion is particularly evident among Retailers compared to Employers. Retailers are significantly more likely to mention late deliveries from suppliers and loss of existing customers or difficulty attracting new customers as problems resulting from traffic congestion. In terms of problems with staff punctuality as a result of traffic congestion, both Retailers and Employers are almost equally affected.

In measuring the effects of **inadequate public transport** on staff punctuality in 2006 compared to 2004, as the chart below shows, it is clear that the Luas has been beneficial for businesses in its catchment areas. In contrast, this appears to be a growing problem in the Control Areas, most notably in Lucan where a significantly higher proportion of businesses now mention problems with staff punctuality as a result of inadequate public transport.

% Affected by Inadequate Public Transport – Compared Across the Catchments

Base: All Respondents

	LUAS Red Line (320) %	LUAS Green Line (320) %	Control Areas (240) %	2006 Retailers (249) %	2006 Employers (625) %
Problems with staff punctuality	34 (42)	33 (45)	33 (29)	37	32
Problems with retention/recruiting staff	16 (16)	14 (17)	15 (12)	16	15
Loss of existing/difficulty attracting new customers	18 (18)	16 (18)	19 (18)	29	13
None of these	55 (47)	56 (42)	57 (58)	48	59

(2004 Figures - Pre Luas launch)

Q. Have you found that inadequate public transport services have caused any of the following for your business in the past 12 months?

In the individual Green Line areas, there has been a significant decline since 2004 in mention of inadequate public transport as a factor in staff punctuality in both Sandyford and Dundrum. In the Red Line areas mention is also down, though less markedly, in Tallaght, Smithfield and Drimnagh.

Problems with *staff punctuality* as a result of inadequate public transport affect both employment sectors. Retailers again are significantly more likely than Employers to experience *loss of existing customers or difficulty attracting new customers* as a result of inadequate public transport.

As in 2004, across the Luas Catchments and the Control Areas the majority of businesses (around two in every three) did not experience any difficulties with staff or customer interactions as a result of **insufficient parking facilities**.

% Affected by Insufficient Parking – Compared Across the Catchments
Base: All Respondents

	LUAS Red Line (320) %	LUAS Green Line (320) %	Control Areas (240) %	2006 Retailers (249) %	2006 Employers (625) %
Problems with retention/recruiting staff	10 (8)	18 (10)	13 (7)	15	13
Difficulty interacting with customers	20 (23)	23 (24)	22 (23)	28	19
Loss of existing/difficulty attracting new customers	18 (23)	23 (24)	22 (22)	35	15
None of these	69 (67)	65 (63)	67 (66)	57	71

(2004 Figures - Pre Luas launch)

Q. And have insufficient parking facilities for your business resulted in...

Although it remains a minority issue, there did appear to be an exacerbation of *problems with staff recruitment/retention* for businesses in the Control Areas and in the Green Line catchment as a result of insufficient parking. In the Control Areas, Drumcondra was the worst affected, with one in five businesses mentioning this as a problem. In the Green Line catchment, Ranelagh and St. Stephen's Green were the most adversely affected, with around one in four identifying parking as an issue for *staff recruitment/retention*.

Regarding the other business aspects potentially damaged by lack of parking, the proportion of businesses in the Control Areas and Green Line catchment experiencing difficulties, either *interacting with or retaining or attracting customers* as a result of insufficient parking, has not changed since 2004, but the situation appears to have improved marginally for those in the Red Line catchment.

Across the individual areas, only businesses in Ranelagh appeared to be experiencing more difficulty now than in 2004 with loss of business or difficulty attracting new customers as a result of insufficient parking.

Some business sectors, particularly the Retail and Hospitality/Leisure/Entertainment sectors, stand out as experiencing more difficulties than others as a result of insufficient parking, with little easing of the problem since 2004. Indeed, looking specifically at the retail sector, Retailers are more than twice as likely as Employers to experience *loss of existing customers or difficulty attracting new customers* as the inevitable fall-out of inadequate parking (mentioned by 35% of Retailers compared with 15% of Employers). In the Luas catchments, this problem is particularly noted by Retailers in the Green Line catchment (44% versus 29% for Red Line Retailers). These findings indicate that despite the advantages the Luas has brought in terms of access, Retailers in particular continue to see parking as a significant stumbling block in their efforts to recruit new and retain their existing customers.

2. AWARENESS OF AND ATTITUDES TOWARDS LUAS - CONTROL AREAS VERSUS LUAS CATCHMENTS

2.1 Awareness of Luas

With Luas a feature of Dublin life for around two years now, there is almost blanket awareness of both Luas lines in the Control Areas (94%), the Luas catchments (Red Line 93% and Green Line 97%) and among Retailers (93%) and Employers (95%).

Awareness of LUAS Lines							
Base: All Respondents							
	Total (880) %	LUAS Red Line (320) %	LUAS Green Line (320) %	Control Areas (240) %		2006 Retailers (249) %	Employers (625) %
Aware of both	95 (78)	93 (77)	97 (78)	94 (80)		93	95
Aware of Red Line from Tallaght to City Centre	2 (12)	5 (20)	- (4)	- (13)		2	2
Aware of Green Line from Sandyford to St. Stephen's Green	2 (8)	1 (2)	3 (17)	3 (3)		3	2
Not aware of either Line	1 (2)	1 (1)	- (1)	3 (3)		1	1

(2004 Figures - Pre Luas launch)

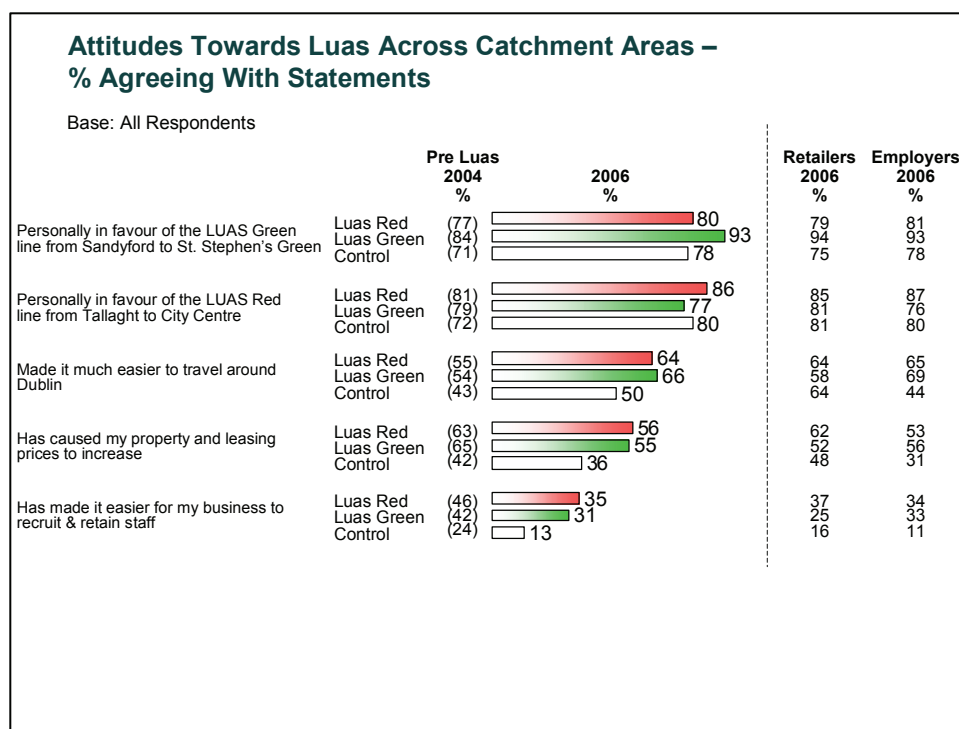
Q. Which of these lines were you aware of before now?

In the Control Areas, Drumcondra businesses demonstrate the highest level of awareness of the service (98%), five percentage points ahead of Rathfarnham and Lucan. Of all the Luas catchment areas surveyed, only Tallaght remains somewhat below the norm in terms of overall awareness of Luas (88% versus 95% overall), with one in ten businesses located in this area claiming to be aware of the Red Line only.

2.2 Attitudes towards Luas

Employers and Retailers in all areas were asked to what extent they agreed or disagreed with a range of statements regarding the impact of Luas on the business community.

Turning firstly to personal endorsement of the service, this is up since 2004 across all the areas surveyed, regardless of whether or not the business is located in a Luas catchment. Naturally, businesses located in the Control Areas continue to display a more muted response to the various dimensions measured, since they are not direct beneficiaries of the service. Nonetheless, they are largely in favour of Luas, and are more likely than in 2004 to endorse the service in terms of its being easier to travel round the city.



Building on a strong level of anticipation in 2004, two in every three businesses in the Luas zones and one in every two in the Control Areas now agree that Luas has made it much easier to travel around Dublin.

In the 'Before' study, there was a strong belief that Luas would cause property and leasing prices in the area to increase for businesses. At that stage, approaching two in every three businesses in the Luas catchments

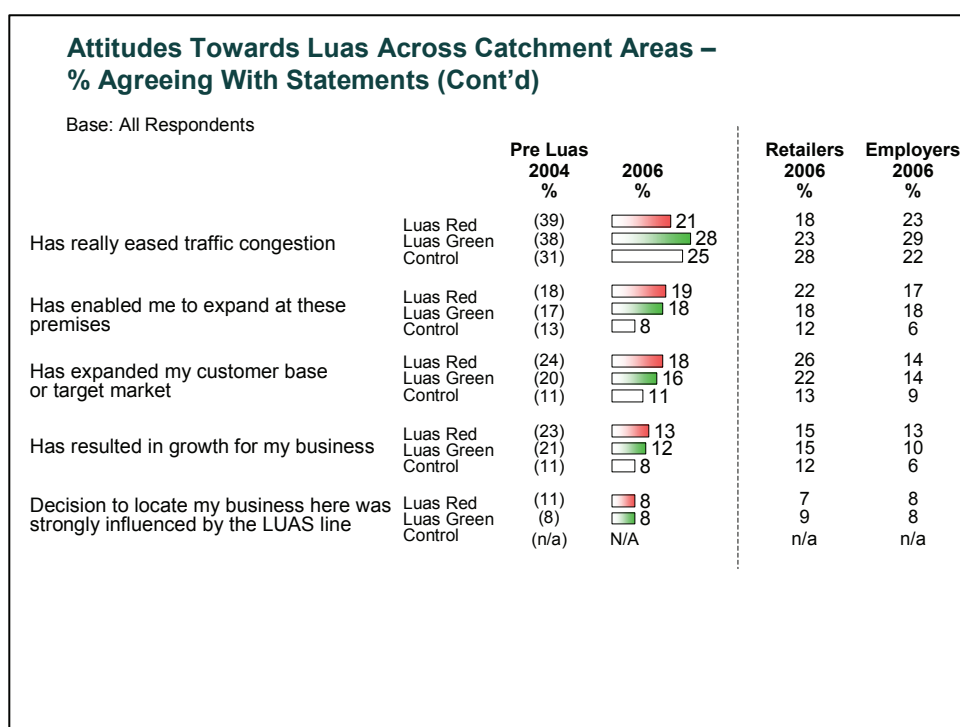
(64%) envisaged this outcome. In the 'After' study, this perception appears to have become a reality for over half (55%) of businesses in the Luas catchments. The true impact of this would depend on whether a premises is owned or leased, as an increase in property price could be beneficial for owners of premises, increasing the value of their capital asset, but obviously disadvantageous for those leasing. Specifically for those leasing, the size of the increase, their ability to pay and its effect on profitability could have an impact on the viability of remaining in the premises. Even in the Control Areas, over one in three (36%) believe that Luas has caused property and leasing prices to increase (42% in 2004), although it is possible that they are commenting in the broader context rather than within the context of their own particular location.

Retailers in the Red Line zone are more likely than Employers to see property and leasing prices as having increased as a result of Luas (62% versus 53%), although there is less of a difference between the two sectors in the Green Line zone in this regard.

In the Control Areas the level of anticipation evident in 2004 that the advent of Luas would make it easier to recruit and retain staff (24%) has not been upheld and now stands at 13%. This is a trend that is also reflected among businesses in the Luas catchments. Prior to the start up of Luas, more than two in every five businesses in its catchments had anticipated a positive spin-off regarding it being easier to recruit and retain staff. This has now declined to around one in three in each catchment and this decline is repeated without exception in the individual areas surveyed in each catchment. That said, some areas appear to have benefited more than others from Luas as an aid to staff recruitment/retention. For example, businesses in Sandyford were the most likely to see Luas as an advantage in this regard (46% versus an overall average for Green Line businesses of 31%). Positive reaction was also slightly above average for Tallaght and Kingswood (each at 40% versus a Red Line average of 35%). These findings indicate that Employers and Retailers in the Luas zones in more outlying areas of the city may be benefitting more from the Luas regarding staff recruitment and retention than are those closer to the City Centre.

In the Green Line zone, Retailers appeared less positive than Employers regarding the impact of Luas on recruiting and retaining staff (25% versus 33% considering that Luas has helped in this respect).

A major perceived advantage of Luas prior to its start-up was the likelihood of its *easing traffic congestion*, although obviously this prospect was more widely anticipated by businesses in the Luas catchments than in the Control Areas. In this latest survey, the expectations of those in the Control Areas have not changed greatly; a slightly lower proportion now believe that the Luas has helped to relieve traffic congestion (25% versus 31% in 2004), with half, as in 2004, disagreeing that it has had any impact.



Whatever expectations those in the Control Areas might have had regarding easing of traffic congestion, it is clear that the expectations of those in the Luas catchments have not been fulfilled to the extent that might have been anticipated, with just one in four now seeing this as a reality (25% versus an anticipatory 39% in 2004). Change in attitude pre and post Luas is most marked for businesses in the Red Line catchment, with just over one in five (21%) seeing a positive impact on traffic congestion, compared with almost two in five (39%) in 2004, a decline of eighteen percentage points; and around two in every three (63%) do not see any positive spin-off compared with two in five (40%) in 2004. Those in the

Green Line catchment are also less positive now than in 2004, though not to the same extent as their Red line counterparts, with a decline in favourable perceptions of ten percentage points since 2004 (28% now versus 38% in 2004).

Across all the individual areas within the catchments, the response regarding easing of traffic congestion is less positive now than in 2004. The strongest negative reaction is noted among businesses in Kingswood and Drimnagh (around seven in every ten disagreeing that the Luas has eased traffic congestion). The most positive reaction (though also down somewhat on 2004) comes from businesses located in Dundrum, with two in five seeing Luas as having eased traffic congestion. This compares with an average of 25% for the combined Luas catchments.

Attitudes regarding *expanding at their business premises* have not changed; as in 2004 virtually identical proportions in both Luas catchments agree that Luas has enabled them to expand. In contrast to those located in the Luas zones, businesses in the Control Areas are much less likely to have expanded at their premises.

Prior to its start up, businesses in the Control Areas had not really anticipated the Luas contributing to an *expansion of their customer base* or *a growth in business* and this situation has not changed in the period since Luas became operational. In the Luas catchments, expectations had not been particularly high either pre-Luas, with just over one in five respectively anticipating an expansion in their customer base or target market and growth in business; in the intervening period this relatively conservative view has proved to be correct, with fewer now noting any of these effects on their business since the Luas became operational. Nonetheless, the fact that a substantial minority in both Luas catchments (17%) claim that they have been able to expand their customer base or target market since the advent of Luas augurs well for the long-term future of the service.

In particular, it is worth noting that reaction on this count tends to be more positive for Retailers, with over one in five in the combined Luas catchments agreeing that the Luas has helped them to expand their customer base or target market. This is in contrast to Employers in the Luas zones, just 14% of whom have seen expansion in their customer base

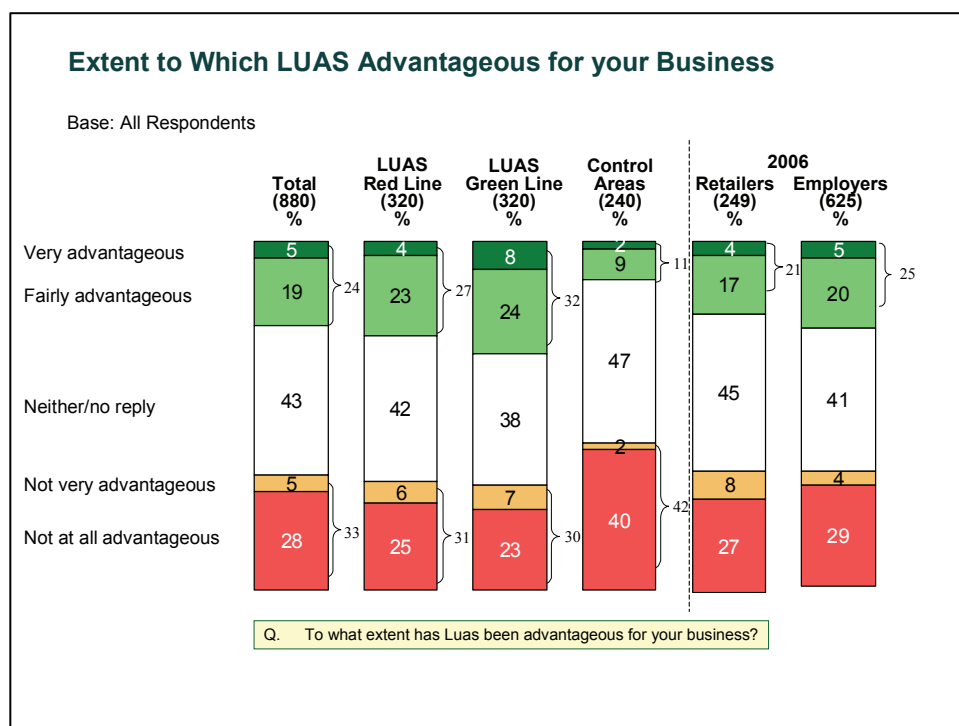
or target market. Similarly, Retailers in the Luas zones are slightly more likely than Employers to note growth in their business as a result of Luas (15% versus 12%).

The proportion of businesses in both catchments agreeing that their *choice of business location was influenced by the Luas line* remains small at 8% for each catchment. Across the individual areas within the catchments, only Kingswood exceeds this average to any extent, with 13% of businesses located here claiming the Luas as an influence.

Within the broad industry sectors, there is no difference between Retailers and Employers in terms of the location of their business. In each case, just 8% said that Luas had influenced their decision to locate in their particular area.

2.3 Has Luas Been Advantageous for Business?

In a new question in 2006, Employers and Retailers were asked “*now that the Luas has been in operation for a reasonable period, to what extent has it been advantageous for your business?*” Their responses are shown in the following chart.



Predictably, only a minority of businesses in the Control Areas (11%) described Luas as advantageous for their business. Nonetheless, it is encouraging to see that despite their distance from the service, a number of businesses have apparently experienced some positive spin-off from its introduction. Looking at the individual districts in the Control Area sample, businesses located in Drumcondra and Rathfarnham were the most likely to have seen some benefits (18% and 14% respectively), whereas virtually no business in Lucan described it as advantageous.

In the Luas catchments, the reaction is more positive, though not overwhelmingly so. Overall, around three in every ten in the catchments (29%) described the service as advantageous for their business, but an almost equal number did not experience any advantages. Comparing the outcome for both lines, Employers and Retailers located along the Green Line were more likely than their Red Line counterparts to describe the

service as beneficial to their business (32% versus 27%), though the difference between the two catchments is not significant. In both catchments around three in every ten businesses did not note any advantages from the arrival of Luas. Indeed, in the Red Line catchment those describing Luas as not advantageous slightly outnumber those who feel it has been advantageous.

Across the individual areas in the Luas catchments, the most positive reaction was recorded for Dundrum (40%), Sandyford (38%) and Tallaght (35%). Businesses located in Drimnagh (18%) and Ranelagh (21%) were the least likely to see it as advantageous.

Among the major business sectors, those in the Business Services/IT sector were the most up-tempo about the Luas being advantageous for their business – 37% describing it so compared with an overall average of 24% for all businesses and 21% for the Retail sector. Positive reaction was also slightly above average for those in the Hospitality/Leisure/Entertainment (28%) and Medical/Healthcare (31%) sectors, though small base sizes for these sectors warrant caution in interpreting results. Overall, Retailers were slightly less likely than other Employers to see Luas as advantageous (21% versus 25%).

In the Luas catchments Employers and Retailers benefitting from the service mentioned '*easier/better access for customers and clients*' (25%), '*easier for staff to get to work*' (26%), and '*better access to the City*' (21%) as the main advantages for their business. Specifically in the Retail sector, easier and better access for customers/clients (33%) came in well ahead of other advantages and was also more widely mentioned than among other Employers (26%). Retailers were also much more likely than other employers (17% versus 4%) to mention acquiring new customers and broadening their customer base as a benefit of Luas.

Some differences were apparent between businesses located in the Red and Green Line catchments that found Luas advantageous. Whereas access for customers and clients was the foremost advantage for businesses in the Red Line (31% versus 20% in the Green Line catchment), those in the Green Line focussed more on making it easier for staff getting to work (31% versus 19% in the Red Line catchment). The

latter were also more likely than their Red Line counterparts to mention better access to the City Centre (25% versus 15%), and convenience (16% versus 5%) as plus points.

On the downside, the primary reason why Luas did not offer any particular advantages for businesses was lack of proximity to the service. Obviously, this was dominant reason for those located in the Control Areas (81%), but even in the Luas catchments themselves two in five (39%) - presumably those located at the outer limits of the individual catchments - cited this as a reason. Distance from the Luas was a particular factor for those in the Retail sector (62% versus 50% for Employers). Specifically in the Luas catchments one in two Retailers who had not found Luas advantageous put this down to distance from the service. Retailers were also more likely than average to mention the Luas taking customers away from their area as a drawback (7% versus 1% for Employers), with some indication that Retailers on the Red Line catchment are more affected by this issue than are those on the Green Line (however, small base figures indicate caution in interpreting these findings).

The following chart expresses the perceived advantages and disadvantages of the Luas across the full sample of businesses (not just those that specifically rated the service as advantageous or not advantageous).

Main Reasons Luas Advantageous and Not Advantageous for your Business Across Full Sample						
Base: All Respondents						
	Total LUAS (640) %	LUAS Red Line (320) %	LUAS Green Line (320) %	Control Areas (240) %	2006 Retailers (249) %	2006 Employers (625) %
<u>Advantageous</u>						
Easier for staff to get to work	8	5	10	2	4	7
Easier/better access for customers/clients	7	8	7	5	7	7
Better access to city centre	6	4	8	*	4	5
It's convenient	3	1	5	1	2	3
Has brought in new customers/ broaden customer base	2	3	1	2	4	1
Don't have to worry about parking	2	2	1	*	1	1
<u>Not Advantageous</u>						
Not close to Luas/not in this area	12	10	13	35	21	16
No effect/bearing on our business	6	6	7	6	2	8
Our type of customer does not use Luas	2	4	1	1	2	2
Customers don't come into our office/ not customer facing	2	2	3	1	*	3
Customers use their car	2	2	3	1	2	2
Do not use the Luas, not much need for it	2	1	3	*	*	2

Q. You say the Luas has been advantageous/not advantageous to your business. Can you explain why?

While this reiterates the disadvantaged status of businesses in the Control Areas regarding access to the Luas, there is undoubtedly some positive spin-off in terms of easier/better access for customers and clients, with 5% of all businesses in the Control Areas seeing this as an advantage (7% in the Luas catchments).

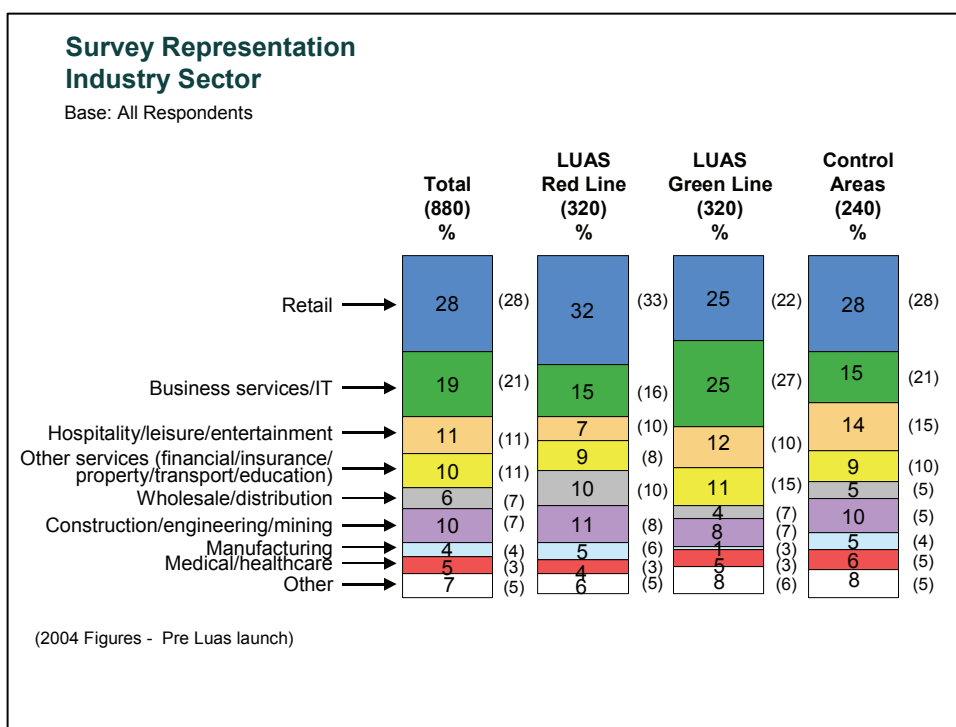
From the perspective of all businesses covered in the survey, 21% of all Retailers mentioned distance from Luas as a drawback compared with 16% of Employers. The latter were more likely than Retailers to describe Luas as having no effect or bearing on their business.

3. EMPLOYER AND RETAILER PROFILES

A wide cross-section of businesses/organisations was covered in the Luas catchments and three Control Areas included in this study and this section of the report provides a contextual background on these businesses against which to examine the research findings.

3.1 Industry Sector

Over the study area as a whole, more than one quarter of businesses (28%) were in the Retail sector. Businesses Services/IT, covering a wide range of activity such as Legal Services, Accounting, Advertising, Marketing Business Consultancy, Computer & IT etc., accounted for one in five businesses (19%). Other sectors of note were Hospitality/Leisure/Entertainment (11%), Other Services (10%) (including financial, insurance, property, transport and education) and Construction/Engineering/Mining (10%).

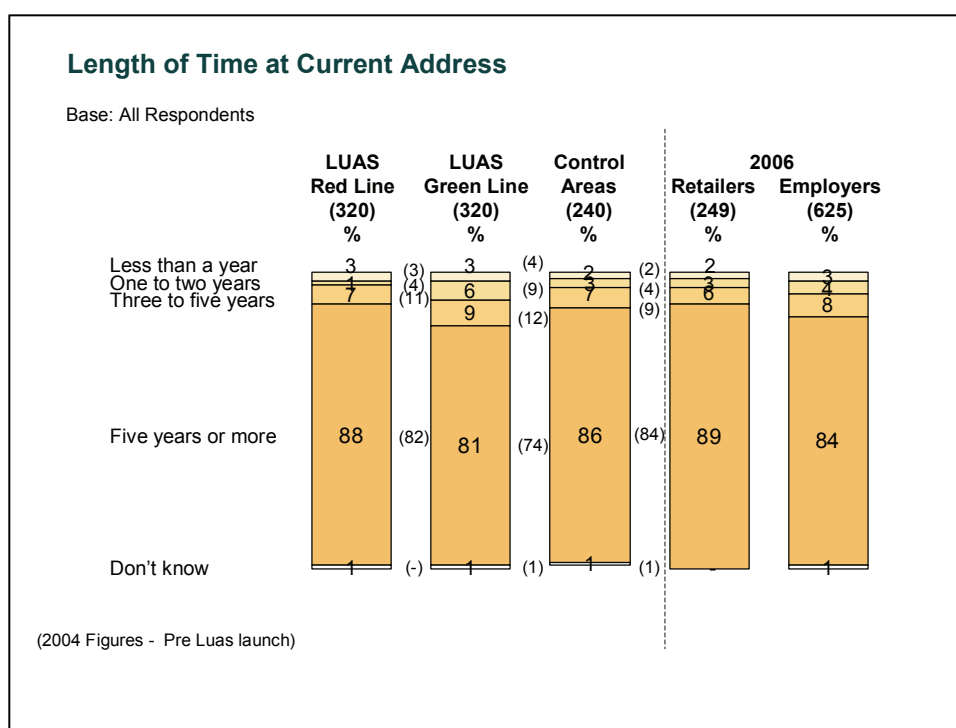


Retail businesses were more prevalent in the Red Line Catchment than in either the Green Line or Control Areas. Business Services/IT type operations were more in evidence in the Green Line catchment, while in the

Control Areas, the proportion of Hospitality/Leisure/Entertainment businesses was slightly higher than in the Luas catchments.

3.2 Length of Residency and Status of Premises

The majority of businesses contacted had been at their current address for five years or longer. However, shorter tenure was more in evidence for businesses in the Green Line catchment than in either the Red Line or Control areas, with approaching one in five (18%) occupying their present premises for less than five years. While overall just one in twelve businesses (8%) located in the Luas zones had been strongly influenced by the service in their decision to move to their particular area, for those with shorter tenure (up to 5 years), the impact of Luas was considerably higher, 19% saying it had been a strong influence in their choice of locale for their business.



Residency of five years or longer was the norm for all industry sectors, though a higher than average proportion of enterprises in the Business Services/IT sector tended to have shorter tenure, with 22% in their current premises for less than five years, compared to an overall average of 14%.

Those leasing premises were less likely to be long term occupants than those who owned their premises (18% less than five years versus 11% for owner occupiers).

Businesses in the Luas catchments were equally split between those who owned their premises and those who leased them (48% in each case). In the Control Areas ownership was ahead of leasing (54% versus 43%). Leasing of premises was highest in the Retail and Business Services/IT sectors (58% and 53% respectively).

Employers were more likely than Retailers to own their premises (54% versus 39%).

Status of Premises – Last Lease Renewal Date						
Base: All Respondents						
	LUAS Red Line (320) %	LUAS Green Line (320) %	Control Areas (240) %	2006 Retailers (249) % Employers (625) %		
Owned	49 (48)	46 (44)	54 (57)	39	54	
Leased	48 (49)	49 (53)	43 (41)	58	43	
Don't know	3 (3)	5 (3)	3 (2)	4	3	
<u>Last Lease Renewal Date#</u>	(153)	(156)	(103)	(144)	(268)	
Base: All Leased	%	%	%	%	%	
Within last year	22	19	20	17	22	
1-2 years ago	14	19	15	15	17	
3-4 years ago	14	17	20	15	18	
5 or more years ago	19	18	22	19	20	
Don't know	31	27	22	33	24	

#New question in 2006
(2004 Figures - Pre Luas launch)

Among businesses leasing their premises around one in five in each of the catchments had renewed their lease within the past year. A similar proportion reported that their renewal had been five or more years previously. In the Control Areas, over two in five enterprises had renewed their lease three or more years ago, compared with 35% of those in the Green Line catchment and 33% of Red Line based businesses.

For approximately one in five, the next lease renewal date was within the next year. Between one fifth and one quarter anticipated a renewal date of five or more years from now.

Status of Premises – Next Lease Renewal Date

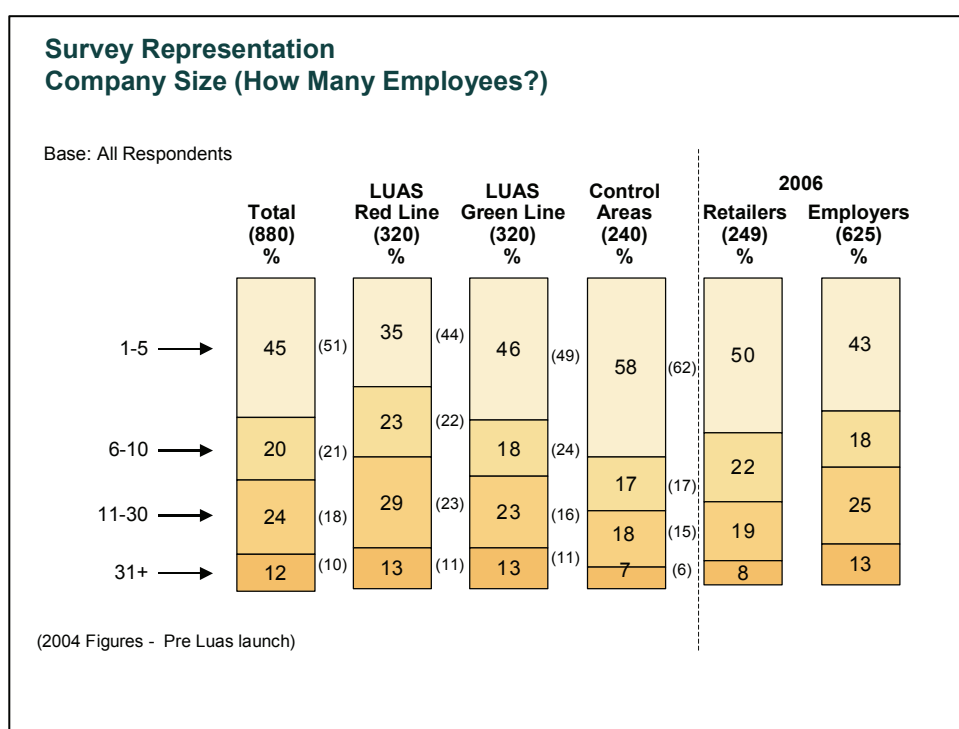
Base: All Respondents

	LUAS Red Line (320) %	LUAS Green Line (320) %	Control Areas (240) %
Owned	49 (48)	46 (44)	54 (57)
Leased	48 (49)	49 (53)	43 (41)
Don't know	3 (3)	5 (3)	3 (2)
<hr/>			
Next Lease Renewal Date	(153) %	(156) %	(103) %
Base: All Leased			
Within next year	20 (25)	19 (23)	19 (15)
1-2 years from now	14 (17)	12 (12)	22 (15)
3-4 years from now	10 (11)	12 (18)	9 (19)
5 or more years from now	19 (15)	25 (27)	23 (18)
Don't know	37 (33)	33 (21)	26 (32)

(2004 Figures - Pre Luas launch)

3.3 Company Size

Almost half of businesses (45%) were small, not exceeding five employees. Small businesses were particularly prevalent in the Control Areas (58%), but were least in evidence in the Red Line catchment.



In the Retail and Business Services/IT sectors, which accounted for almost half of all businesses contacted, the majority of enterprises - around seven in every ten - had a workforce of ten or fewer. The Hospitality/Leisure/Entertainment and Wholesale/Distribution sectors were the most likely to employ in excess of ten people.

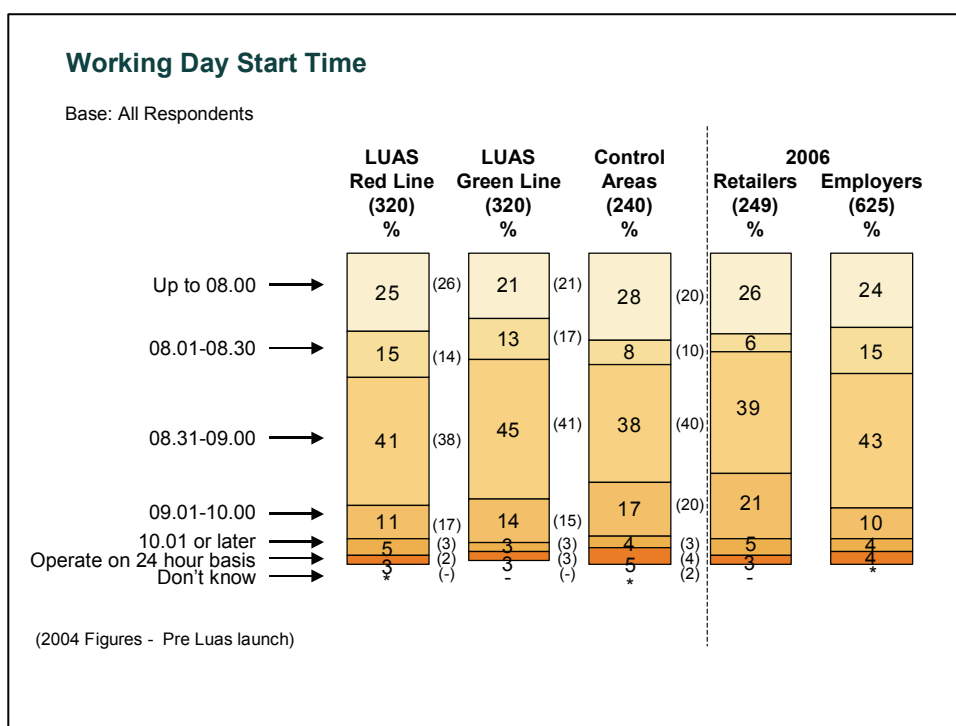
Over the sample as a whole, the majority of employees (73%) worked full time, although there were predictable variations by industry sector. Around half of workers in the Retail sector (51%) worked full time. In contrast, the vast majority (90% +) of those employed in the Wholesale/Distribution, Manufacturing/Construction/Engineering/Mining and Business Services/IT were full-time.

As in 2004, the majority of employees in the Luas catchments, around eight in every ten, were full-time workers. Again similar to 2004, just one in every two employees in the Control Areas worked full time, reflecting an above average level of businesses in the hospitality/leisure/entertainment sector (14% versus 10% in the Luas catchments) where the incidence of part-time employment is well above average, and a proportionately greater number of businesses in the medical/healthcare sector (6% versus 4% for Luas zones), a sector which also attracts a higher proportion of part-time workers. Furthermore, 28% of all businesses in the Control Area were engaged in retailing, a sector which also employs a high proportion of part-time workers.

3.4 The Working Day

Start time

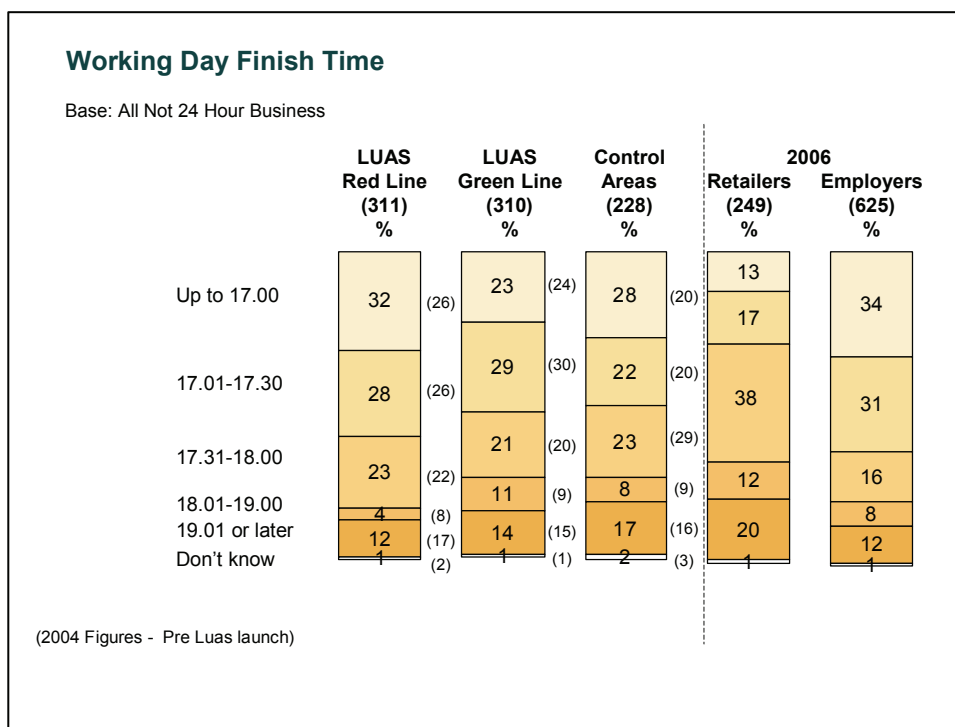
As the chart below shows, the majority of businesses in the Luas and Control Areas start their working day between 08.00 and 09.00. A substantial minority in each catchment start before 08.00. This pattern is generally consistent across the catchments, though there is evidence of a higher proportion of early starters in the Control Areas and Red Line catchment.



Across the industry sectors an early start time (up to 08.30) is most in evidence in Construction, Manufacturing and Wholesale/Distribution. While the majority of Retail businesses are in operation by 09.00, a substantial one in five have a later start, between 09.00 and 10.00. In the Business Services/IT sector a start time between 08.00 and 09.00 is the norm.

Finishing time

For businesses not engaged in 24 hour activity, the working day ends for most between 17.00 and 18.00. Businesses in the Red Line catchment are significantly more likely than those in the Green Line to end their working day earlier – 32% versus 23 % finishing by 17.00.



Weekend working

Half of all businesses contacted (52%) did not work at weekends. Almost half operated on Saturday (48%), rising to 81% among Retailers compared with 35% for Employers. Around one in four were open for business on Sunday (26%), with two in every five Retailers having Sunday opening. The incidence of Saturday and Sunday opening was higher in the Control Areas than in the Luas catchments.

Weekend Working

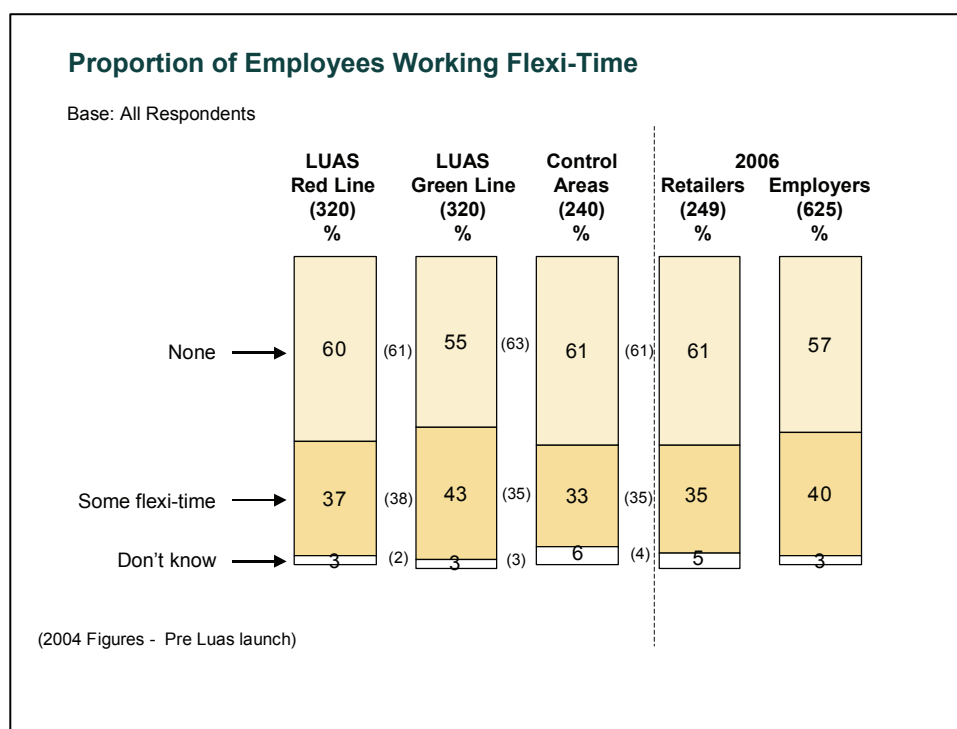
Base: All Respondents

	Total (880) %	LUAS Red Line (320) %	LUAS Green Line (320) %	Control Areas (240) %	2006 Retailers (249) % Employers (625) %	
Saturday	48 (50)	46 (53)	42 (43)	58 (56)	81	35
Sunday	26 (25)	21 (26)	25 (21)	33 (28)	41	20
No weekend working	52 (49)	54 (46)	58 (57)	41 (42)	18	65

(2004 Figures - Pre Luas launch)

Flexi Time

The incidence of flexi-time was highest in the Green Line catchment, with 43% of businesses claiming that some employees availed of flexi-time, compared with 37% in the Red Line catchment and 33% in the Control Areas. Since 2004, the proportion of employees working flexi-time has increased significantly for businesses in the Green Line catchment (43% now versus 35% pre Luas), in contrast to the situation for those in the Red Line and the Control areas where change was not significant.



Companies operating a flexi-time system were asked whether there were core hours during the week for which all staff were expected to be present. Around half in both the Red and Green Line catchments reported that core time hours were observed, with a somewhat lower two in five in the Control Areas operating core time. For the majority of businesses across the catchment and control areas, core time started between 09.00 and 10.00 and ended between 16.00 and 17.30.

Employers were more likely than Retailers to have flexi-time core hours (52% versus 39%).

Flexi-Time Core Hours?							
Base: All With Flexi-Time							
	LUAS Red Line (115) %		LUAS Green Line (129) %		Control Areas (76) %		2006 Retailers (79) % Employers (240) %
Yes	49	(50)	53	(61)	41	(45)	39 52
<hr/>							
<u>Core Hour Start Time</u>	(56) %		(69) %		(31)* %		(31)* % (125) %
Before 09.00	16	(17)	9	(15)	10	(13)	13 11
09.00-10.00	73	(71)	80	(76)	74	(71)	68 78
After 10.00	11	(12)	12	(9)	16	(11)	19 10
<u>Core Hour Finish Time</u>							
Before 16.00	16	(25)	19	(15)	16	(24)	19 17
16.00-17.30	68	(68)	67	(72)	68	(53)	39 74
After 17.30	16	(4)	14	(13)	13	(19)	42 8
*Caution: Small base size (2004 Figures - Pre Luas launch)							

3.5 Participation in Easi-Travel Plan

Participation in this scheme remains the exception rather than the rule. However, the take-up amongst businesses in the Green Line catchment has almost doubled since 2004 (13% now, or approximately 40 businesses, versus 7%, or approximately 22 businesses pre-Luas). For businesses in the Red Line catchment, participation was at virtually the same level as in 2004 (around 25 businesses).

Participation in Easi Travel Plan					
Base: All Respondents					
	LUAS Red Line (320) %	LUAS Green Line (320) %	Control Areas (240) %	2006 Retailers (249) %	2006 Employers (625) %
Yes - participate	8 (7)	13 (7)	3 (6)	5	10
No – do not participate	86 (90)	83 (90)	91 (93)	90	85
Don't know	5 (3)	3 (3)	6 (2)	5	4

(2004 Figures - Pre Luas launch)

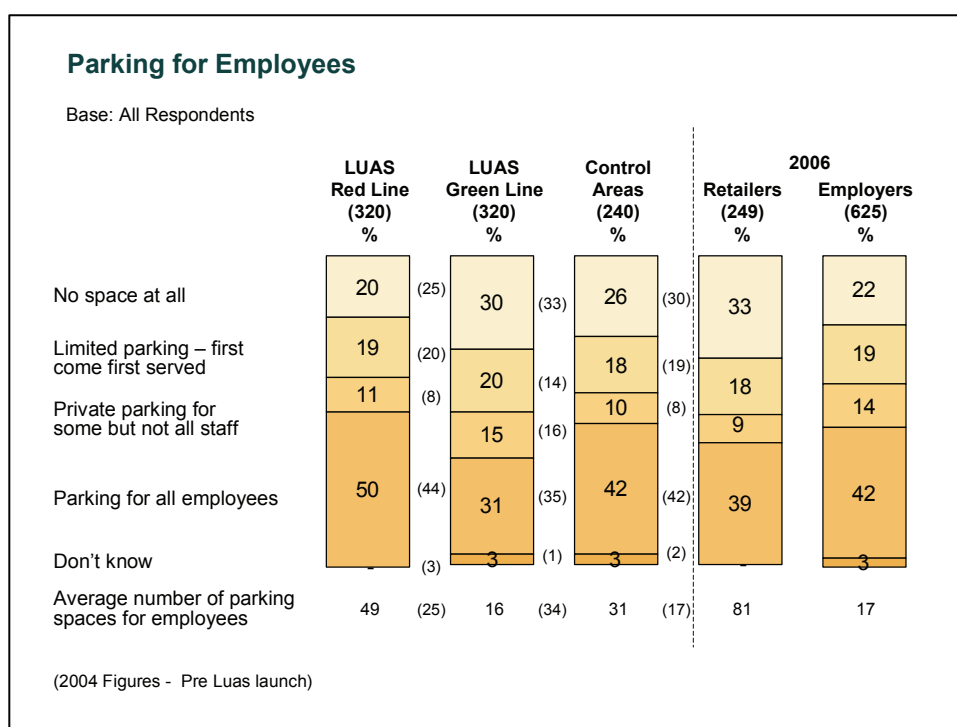
In the Control Areas, participation has declined from 6% (or 14 businesses in 2004) to 3% (or 7 businesses) now.

Company size and industry sector also had a bearing on the level of participation. In particular, over one quarter (27%) of larger companies (31+ employees) participated and take-up was above average for service industries, such as Business Services/IT (15%) and Other Services (13%).

Within the two broad employment categories, Employers were twice as likely as Retailers (10% versus 5%) to participate in the scheme.

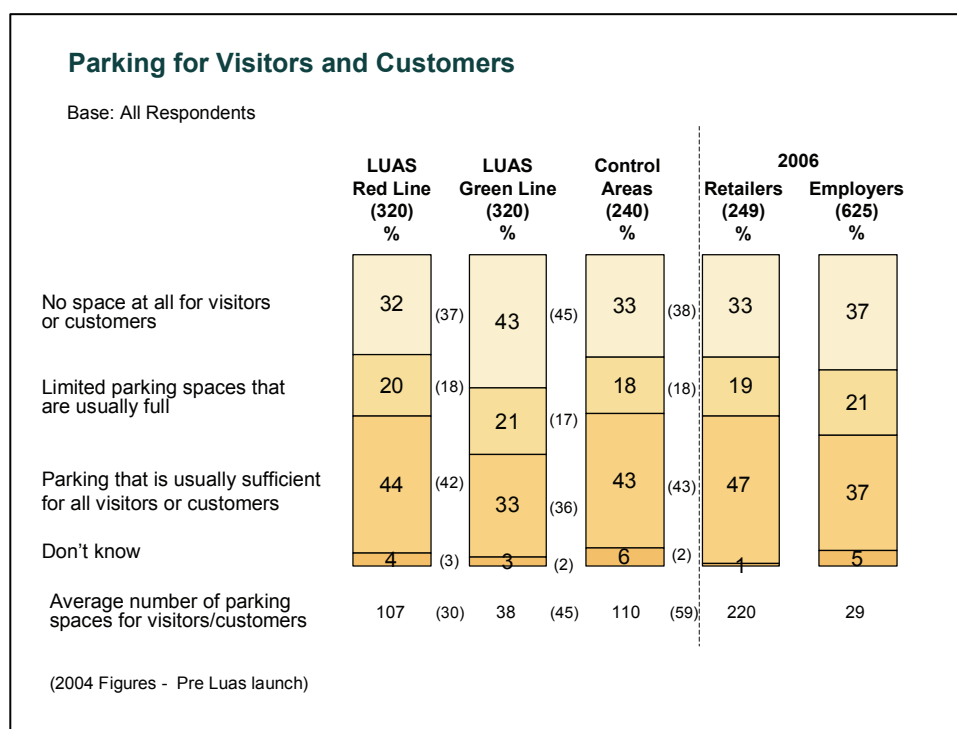
3.6 Parking Facilities for Employees and Customers

The overall situation regarding parking for employees and customers has not changed significantly since 2004. As in the Luas 'Before' study, businesses in the Green Line catchment were significantly more likely than their counterparts in the Red Line catchment to have **no** parking for employees, whereas those on the Red Line were significantly more likely to have parking for **all** employees. In the Control Areas, over one quarter had no parking at all for employees while over two in five, as in 2004, had parking for all their staff.



Focusing on industry sector, parking for employees is scarcest for businesses in the Retail and Hospitality/Leisure/Entertainment sectors, with 33% and 39% respectively having no parking for their staff.

As regards parking for visitors and customers, as noted above, those located in the Green Line catchment were also the least likely to have spaces – 43% with no spaces, compared with 32% for Red Line businesses and 33% for Control Area enterprises.



Retailers were more likely than employers (47% versus 37%) to have parking that is sufficient for all visitors and customers.

The higher average number of parking spaces for visitors and customers in 2006 versus 2004 results from a higher number of businesses in 2006 (5% versus 2% in 2004 in the combined Luas zones and 10% versus 5% in the Control Areas) claiming to have in excess of 200 parking spaces for visitors and customers.

Appendices

Questionnaire

Dublin Transport Office - Employers and Retailers

© Millward Brown IMS Limited: April 2006

Good morning/afternoon. My name iscalling from Millward Brown IMS. We are carrying out a short, ten-minute survey among local businesses on behalf of the Dublin Transportation Office. This is a follow-up survey from a previous study we carried out 2 years ago. I need to speak with the person who is in charge at your particular location – such as the owner, managing director, a director or manager. Who would be the best person to speak with?

Record Name:

May I speak to named person now please?

WHEN SPEAKING TO CORRECT PERSON: Good morning/afternoon. My name iscalling from Millward Brown IMS. We are carrying out a short, ten-minute survey among local businesses on behalf of the Dublin Transportation Office. Would you have a few minutes to complete the survey with me now? IF NOT: Could I make an appointment to call you back at a more convenient time?

Q. 1 How many employees do you have at this address? RECORD NUMBER

1	2	3	4	5	6	7	8	9	V	X	0
1	2	3	4	5	6	7	8	9	V	X	0

Q. 2 How many of these employees work with you full time, in other words 30 or more hours per week?

RECORD NUMBER

Q. 3 What time does your organisation normally begin its working day during the week?

RECORD TO CLOSEST HALF HOUR

ASK IF CODED OTHER THAN 99 AT Q.3

Operates on a 24 hour basis ... 99 Skip to Q.5

Q.4 What time does your organisation normally finish its working day during the week?

RECORD TO CLOSEST HALF HOUR

Q. 5 Would employees normally be scheduled to work in your location on...

READ OUT ➔

<ul style="list-style-type: none"> ▪ Saturday 1 ▪ Sunday 2 ▪ Neither 3 	
---	--

Q. 6 What proportion of your employees would have the option to work flexible hours as part of a system of flexi-time?

PROBE TO PRECODES

<ul style="list-style-type: none"> ▪ None 1 ▪ 1 - 10% 2 ▪ 11 - 20% 3 ▪ 21 - 30% 4 ▪ 31 - 40% 5 ▪ 41 - 50% 6 ▪ 51 - 60% 7 ▪ 61 - 70% 8 ▪ 71 - 80% 9 ▪ 81 - 90% X ▪ 91 - 100% V 	
--	--

ASK IF CODED OTHER THAN 'NONE' AT Q.6 AND NOT CODE 99 AT Q.3

Q. 7 Are there core hours during the week for which all staff are expected to be present?

<ul style="list-style-type: none"> ▪ Yes 1 <hr style="border: 0; border-top: 1px dashed black;"/> <ul style="list-style-type: none"> ▪ No 2 	
---	--

ASK IF CODED YES AT Q.7

Q.8 What time do these core hours start on weekdays?

RECORD TIME TO CLOSEST HALF HOUR

<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid black; width: 40px; height: 30px; display: flex; align-items: center; justify-content: center;"> </div> <div style="border: 1px solid black; width: 40px; height: 30px; display: flex; align-items: center; justify-content: center;"> </div> <div style="border: 1px solid black; width: 40px; height: 30px; display: flex; align-items: center; justify-content: center;"> </div> <div style="border: 1px solid black; width: 40px; height: 30px; display: flex; align-items: center; justify-content: center;"> </div> </div>	
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Q.9 What time do these core hours end on weekdays?

RECORD TIME TO CLOSEST HALF HOUR

<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid black; width: 40px; height: 30px; display: flex; align-items: center; justify-content: center;"> </div> <div style="border: 1px solid black; width: 40px; height: 30px; display: flex; align-items: center; justify-content: center;"> </div> <div style="border: 1px solid black; width: 40px; height: 30px; display: flex; align-items: center; justify-content: center;"> </div> <div style="border: 1px solid black; width: 40px; height: 30px; display: flex; align-items: center; justify-content: center;"> </div> </div>	
---	--

Q. 10 Which of these descriptions best fits the parking situation at your location for employees?

READ OUT ➔

<ul style="list-style-type: none"> ▪ No spaces at all for employees 1 ▪ Limited parking spaces distributed on a first come first serve basis 2 ▪ Private parking spaces for some employees but not for all staff 3 ▪ Parking for all employees 4 	
--	--

ASK IF DID NOT SAY ‘NO SPACES AT ALL’ CODE 1 AT Q.10,

Q. 11 How many spaces do you have for employees in total?

RECORD EXACT NUMBER

--	--	--

Q. 12 Which of the following best describes the parking situation at your location for visitors or customers?

READ OUT ➔

<ul style="list-style-type: none"> ▪ No spaces at all for visitors or customers.... 1 ▪ Limited parking spaces that are usually full 2 ▪ Parking that is usually sufficient for all visitors or customers..... 3 	
---	--

ASK IF DID NOT SAY ‘NO SPACES AT ALL’ CODE 1 AT Q.12,

Q. 13 How many spaces do you have for visitors or customers in total?

RECORD EXACT NUMBER

--	--	--

Q. 14 Does your company participate in the **Easi-Travel Plan**, which provides for a tax-free public transport ticketing scheme for employees?

<ul style="list-style-type: none"> ▪ Yes 1 ----- ▪ No..... 2 	
---	--

IF YES Q.14

Q. 15 How many people participate in the scheme?

RECORD EXACT NUMBER

--	--	--

Q.16a Now I would like you to think about this area, the area in which you work, I am going to read out a list of different elements that affect businesses in any area or district. For each one I would like you to tell me how satisfied or dissatisfied you are with this area on a scale of 1 to 7 where 7 is extremely satisfied and 1 is extremely dissatisfied
How satisfied or dissatisfied are you with this area's.....**READ OUT**

Rotate start	<i>Extremely Satisfied</i>							<i>Extremely Dissatisfied</i>	<i>Don't Know</i>
	7	6	5	4	3	2	1		
<input type="checkbox"/> Level of traffic pollution	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Shopping facilities.....	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Access to and from this area and the city centre	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Access to and from this area and nearby areas.....	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Access to and from this area and the Airport.....	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Safety from crime.....	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Social and recreational facilities (such as gyms, pubs and restaurants, shopping)	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Safety for pedestrians.....	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Quality of footpaths	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Safety for cyclists.....	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Level of traffic congestion	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Service to and from this area by bus.....	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Access to LUAS from this area.....	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Access to trains/DART from this area	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Seen as being a desirable place to be located in	7	6	5	4	3	2	1	0	
<input type="checkbox"/> Relatively low priced for leasing or purchasing of space	7	6	5	4	3	2	1	0	

Q.16b Still thinking about this area, overall, how satisfied or dissatisfied are you with the area as a good place to work? On a scale of 1 to 7 where 7 is extremely satisfied and 1 is extremely dissatisfied how satisfied would you say you are?

	<i>Extremely Satisfied</i>							<i>Extremely Dissatisfied</i>	<i>Don't Know</i>
	7	6	5	4	3	2	1		
								0	

Q.17a Thinking about all the aspects of this area that I have just asked you about. **READ OUT LIST AGAIN**
If one of these aspects could be improved, which **one** would have the most positive effect on your business?

Q.17b And **which others** would have a very positive impact on your business if they were improved?

Rotate start	Most Important (Single Code)	Other Important (Multicode)
<input type="checkbox"/> Level of traffic pollution	1	1
<input type="checkbox"/> Shopping facilities.....	2	2
<input type="checkbox"/> Access to and from this area and the city centre	3	3
<input type="checkbox"/> Access and from this area and nearby areas.....	4	4
<input type="checkbox"/> Access to and from this area and the Airport	5	5
<input type="checkbox"/> Safety from crime.....	6	6
<input type="checkbox"/> Social and recreational facilities (such as gyms, pubs and restaurants)	7	7
<input type="checkbox"/> Safety for pedestrians.....	8	8
<input type="checkbox"/> Quality of footpaths	9	9
<input type="checkbox"/> Safety for cyclists.....	X	X
<input type="checkbox"/> Level of traffic congestion	V	V
<input type="checkbox"/> Service to and from this area by bus	O	O
<input type="checkbox"/> Access to LUAS from this area.....	1	1
<input type="checkbox"/> Access to trains/DART from this area	2	2
<input type="checkbox"/> Seen as being a desirable place to be located in.....	3	3
<input type="checkbox"/> Relatively low priced for leasing or purchasing of space	4	4

Q.18 Some businesses in Dublin have been affected by traffic congestion, while others have not. Which of the following has happened in your business as a result of traffic congestion within the past 12 months?

READ OUT

<ul style="list-style-type: none"> ■ Problems with staff punctuality 1 ■ Problems with retention and/or recruiting of staff..... 2 ■ Late deliveries from suppliers 3 ■ Difficulties for organisation's staff when visiting customers 4 ■ Loss of existing customers or difficulty attracting new customers 5 ■ None of these 6 	
---	--

Q.19 Have you found that inadequate public transport services have caused any of the following for your business in the past 12 months?

READ OUT

<ul style="list-style-type: none"> ■ Problems with staff punctuality 1 ■ Problems with staff retention or recruiting 2 ■ Loss of existing customers or difficulty attracting new customers 3 ■ None of these 4 	
--	--

Q.20 And have insufficient parking facilities for your business resulted in...

READ OUT

■ Problems with retention and/or recruiting of staff.....	1	
■ Difficulties interacting with customers	2	
■ Loss of existing customers or difficulty attracting new customers	3	
■ None of these	4	

Light rail lines called Luas now operate in Dublin. The Red Line runs from Tallaght to the City Centre; The Green Line runs from Sandyford to St. Stephen's Green

Q.21 Which of these lines were you aware of before now?

ROTATE 1 and 2 →

■ Red Line from Tallaght to the City Centre.....	1	
■ Green Line from Sandyford to St. Stephens Green.....	2	
■ Both.....	3	
■ Neither.....	4	

Q.22 Now I would like to read you some statements that other people have made about the Luas, for each I would like you to tell me how much you agree or disagree with the statement on a scale of 1 to 7 where 1 is disagree strongly and 7 is agree strongly

Rotate start	Disagree Strongly	Disagree	Slightly Disagree	Neither	Slightly Agree	Agree	Agree Strongly
<input type="checkbox"/> The Luas has really eased traffic congestion.....	1	2	3	4	5	6	7
<input type="checkbox"/> The Luas has made it much easier to travel around Dublin.....	1	2	3	4	5	6	7
<input type="checkbox"/> The Luas has expanded my customer base or target market	1	2	3	4	5	6	7
<input type="checkbox"/> The Luas has resulted in growth for my business	1	2	3	4	5	6	7
<input type="checkbox"/> I am personally in favour of the Luas Red line from Tallaght to the City Centre	1	2	3	4	5	6	7
<input type="checkbox"/> I am personally in favour of the Luas Green line from Sandyford to St. Stephens Green.....	1	2	3	4	5	6	7
<input type="checkbox"/> The Luas has enabled me to expand at these premises.....	1	2	3	4	5	6	7
<input type="checkbox"/> The decision to locate this business in these premises was strongly influenced by the Luas line (included only for areas in the catchment)*	1	2	3	4	5	6	7
<input type="checkbox"/> The Luas has caused property and leasing prices in this area to increase.....	1	2	3	4	5	6	7
<input type="checkbox"/> The Luas has made it easier for my business to recruit and retain staff.....	1	2	3	4	5	6	7

Q. 23 Now that the Luas has been in operation for a reasonable period, to what extent has it been advantageous for your business. Has it been.....**READ OUT**

- Very advantageous..... 1
- Fairly advantageous 2
- Neither an advantage nor a disadvantage.. 3
- Not very advantageous..... 4
- Not at all advantageous 5

IF VERY/FAIRLY ADVANTAGEOUS

Q. 24a You say the Luas has been advantageous to your business. Can you explain why? **PROBE FULLY**

<table border="1" style="float: right; width: 15%; text-align: center; border-collapse: collapse;"> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>V</td><td>X</td><td>0</td> </tr> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>V</td><td>X</td><td>0</td> </tr> </table>	1	2	3	4	5	6	7	8	9	V	X	0	1	2	3	4	5	6	7	8	9	V	X	0	
1	2	3	4	5	6	7	8	9	V	X	0														
1	2	3	4	5	6	7	8	9	V	X	0														

IF NOT VERY/NOT AT ALL ADVANTAGEOUS

Q. 24b You say the Luas has not been advantageous to your business. Can you explain why? **PROBE FULLY**

<table border="1" style="float: right; width: 15%; text-align: center; border-collapse: collapse;"> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>V</td><td>X</td><td>0</td> </tr> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>V</td><td>X</td><td>0</td> </tr> </table>	1	2	3	4	5	6	7	8	9	V	X	0	1	2	3	4	5	6	7	8	9	V	X	0	
1	2	3	4	5	6	7	8	9	V	X	0														
1	2	3	4	5	6	7	8	9	V	X	0														

Now I would just like to ask you a few questions about your business. These questions will be used for classification purposes only. Your company's responses will remain anonymous.

Q.25 What is your position within the organisation?

- Owner/proprietor..... 1
- Partner 2
- Director 3
- Manager 4
- Other (specify and code) 5

Q.26 How long has your business been at this address?

PROBE TO PRECODES

- Less than one year..... 1
- One to two years 2
- Three to five years..... 3
- Five years or more..... 4

Q. 27 Is this premises owned by the organisation or is it leased?

- Owned 1
- Leased 2

ASK IF 'LEASED' AT Q.27

Q. 28 When did you last renew your lease?

- Within the last year 1
- 1-2 years ago 2
- 3-4 years ago 3
- 5 or more years ago 4

Q. 29 When is your next lease renewal date?

- Within the next year 1
- 1-2 years time 2
- 3-4 years time 3
- 5 or more years time 4

ASK IF 'LEASED' AT Q.27

Q. 30 And what would be the rough annual cost of your lease, excluding service charges, per square foot?

- Less than €50 per square foot 1
- €51-100 per square foot 2
- €101-200 per square foot 3
- €201-300 per square foot 4
- €301-400 per square foot 5
- €401-500 per square foot 6
- More than €500 per square foot 7
- Refused 8

Q.31 May I just confirm what industry sector you are in?

- Wholesale Trade1
 - Retail – Food2
 - Retail – Car Sales-Service-Petrol3
 - Retail - Pharmacy4
 - Retail Other.....5
 - Hotels-Restaurants6
 - Licensed Trade7
 - Other Tourism.....8
 - Distribution9
 - ManufacturingX
 - LegalV
 - AccountingO
 - Other Business Services1
 - Computer-IT2
 - Medical-Healthcare3
 - Entertainment & Leisure4
 - Construction-Engineering-Mining5
 - Property-Real Estate (Architect-6
Auctioneer - Agents)6
 - Finance-Insurance.....7
 - Charitable-Community-NGO's8
 - Printing-Publishing.....9
 - Agriculture-Farming-HorticultureX
 - Other (specify)_____
- _____) V
- Refused..... 0 - Do not
read out**

Q. 32 We conducted a similar survey 2 years ago.
Do you remember your company taking part
in this previous survey?
DON'T READ OUT

- Yes, took part..... 1
- No, did not take part 2
- Can't remember 3

Research Methodology



Survey Approach

The survey was conducted across a representative sample of employers/ retailers in each Luas Line catchment and in designated Control Areas.

In total, eleven areas were covered in the survey; four areas in each of the Luas catchments and three areas in the Control sample.

The Catchments

Catchments were defined as locations within a one kilometre radius of a specific midpoint within the area, identified as follows:

AREA	MID-POINT
<u>LUAS RED LINE</u>	
Kingswood	Adjacent to Embankment Road east of Sylvan Drive (Dublin 24)
Tallaght	Old Blessington Road junction with Belgard Square West (Dublin 24)
Drimnagh	Adjacent to Davitt Road opposite Sperrin Road (Dublin 12)
Smithfield	North of Phoenix Street North (Dublin 7)
<u>Luas Green Line</u>	
Sandyford	Off Blackthorn Avenue, north of Woodford Estate (Co. Dublin)
Dundrum	Beside Old Dundrum Railway Station – south of Taney Bridge (Dublin 14)
Ranelagh St. Stephen's Green	Elevated directly over Ranelagh Road (Dublin 6) St. Stephen's Green West between South King St. and Glover's Alley (Dublin 2)
<u>Control Areas</u>	
Lucan	Junction of Ballyowen Road and Castle Road
Rathfarnham	Junction of Rathfarnham Road and Willbrook Road
Drumcondra	Junction of Drumcondra Road Lower and Clonliffe Road

The Sample

A sample size of 80 enterprises was contacted per location, yielding a total of 880 employers/retailers over the eleven selected areas. Lists of businesses within each catchment area were provided by Bill Moss & Associates, a database brokerage based in Dublin, specialising in the provision of databases for business to business research. In addition to contact details, such as company name, address, telephone number, etc., the database for each catchment area provided information on the type of business, for use in classifying businesses by industry sector, e.g. retail, manufacturing, wholesale, business services. Information on company size as defined by the number of employees was also provided. In total, 9,082 leads were provided, a leads ratio of 10.32 for the sample overall. The number of leads per catchment area is shown below:

CATCHMENT	NO. OF LEADS
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LUAS RED LINE

Kingswood	411
Tallaght	364
Drimnagh	669
Smithfield	982

LUAS GREEN LINE

Sandyford	712
Dundrum	971
Ranelagh	1,027
St. Stephen's Green	1,974

CONTROL AREAS

Lucan*	514
Rathfarnham	653
Drumcondra	805

Using this database, a representative mix of enterprises was contacted in each of the eleven locations identified for the survey.

**Note: Some difficulties were experienced in contacting a sufficient number of businesses within a one kilometre radius in the Lucan area. Following consultation with the DTO in the 'Before' Study in 2004, the boundaries were extended to two kilometres from the mid-point in order to achieve the required sample.*

Data Collection

The survey was conducted by means of a telephone interview with an appropriate staff member at management level in each business contacted. Interviews were carried out through the MBIMS Computer Aided Telephone Interviewing (CATI) Unit. The CATI system is an integrated suite of software packages which allows for all phases of the project, from sample build-up, through the interviewing itself (which is conducted directly from the screen with direct input of results) to the final analysis of accumulated results.

In Computer Aided Telephone Interviewing, a considerable amount of time is invested in designing and testing the computer based questionnaire before fieldwork starts. For this particular project, script testing was done by three separate departments as a triple check that the script had been created correctly. Research, Data Analysis and CATI Units all tested the questionnaire to ensure that it was correct. Internal piloting was conducted within MBIMS in order to test the questionnaire for ease of administration and respondent comprehension and a time analysis was run to estimate average interview length. Prior to commencing interviewing, all interviewers working on the project received a full briefing including a practice session and were given a set of briefing notes.

As all elements of the survey were checked and cross checked at the set-up stage of the project, once the survey went 'live', the captured data in live interviews was correct and regulated.

Quality control was carried out over the duration of the project on live interviews and involved entire interviews being listened to and watched by a supervisor. Standard practice in CATI surveys is to carry out quality control checks on 5% of all interviews.

Interviewing was conducted from 21st April to 31st May 2006.

Data Analysis

All coding and analysis on the study was done in-house by Millward Brown IMS.

At the analysis stage, results for the individual catchments along each of the Luas Lines and the Control Areas were aggregated, giving a sample of 320 businesses for each LUAS Line catchment and 240 in the Control Areas. The aggregated samples per Luas Line and for the Control Areas were robust enough to sustain cross analysis by broad industry sector and company size. On a per location basis, however, the sample size of 80 per catchment was sufficient only to look at the results in totality, but not robust enough to undertake detailed cross analysis.

Standard cross breaks for the total sample of 880 interviews and for each Luas Line and the Control Areas, included the individual locations covered, industry sector, number of employees, length of time at address, and status of premises (owned or leased).

The margins of error attached to the overall sample and the various sub-samples involved in the project are shown below.

Sample Size – Margin of Error	
Average confidence interval (based on the 50% proportion at the 95% confidence level)	
Sample Size	Margin of Error
Total Sample 880 employers/retailers (11 areas x 80 enterprises)	+/- 3.3%
LUAS Line A/Line B 320 employers/retailers (4 Line A or Line B areas x 80 enterprises)	+/- 5.5%
Control Areas 240 employers/retailers (3 control areas x 80 enterprises)	+/- 6.3%
Individual Areas 80 employers/retailers	+/- 10.9%