



ESSENTIAL ECONOMICS

State Significant Employment Precincts

Business Intentions Survey

FINAL

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Metropolitan Planning Authority

Department of Economic Development, Jobs, Transport and Resources

by

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Contents

Executive Summary	i
1 Introduction	1
2 Project Background	3
2.1 Plan Melbourne and Plan Melbourne Refresh	3
2.2 National Employment Clusters.....	3
2.3 State Government Role in Precinct Development	3
2.4 Need for Business Intelligence	3
2.5 Summary	4
3 Methodology.....	5
3.1 On-Line Survey	5
3.2 Survey Distribution.....	5
3.3 Questionnaire.....	5
3.4 Follow-Up Activities	7
4 Broadmeadows MAC – Survey Findings	8
4.1 Introduction	8
4.2 Choosing the Best Location.....	11
4.3 Exporting	21
4.4 The Future of your Business.....	28
4.5 Alternative Locations	34
4.6 Skills.....	36
4.7 Impact of Infrastructure/Investment Initiatives.....	37
4.8 Building Relationships	39
4.9 Conclusions	42
5 Dandenong South NEC – Survey Findings	43
5.1 Introduction	43
5.2 Choosing the Best Location.....	46
5.3 Exporting	57
5.4 The Future of your Business.....	70
5.5 Alternative Locations	76
5.6 Impact of Infrastructure / Investment Initiatives.....	81
5.7 Building Relationships	83
5.8 Conclusions	88
6 Fishermans Bend URA – Survey Findings.....	89
6.1 Introduction	89
6.2 Choosing the Best Location.....	92
6.3 Exporting	102
6.4 The Future of your Business.....	109
6.5 Alternative Locations	115
6.6 Impact of Infrastructure / Investment Initiatives.....	120
6.7 Building Relationships	122
6.8 Conclusions	125
7 La Trobe NEC – Survey Findings.....	127
7.1 Introduction	127

7.2	Choosing the Best Location	130
7.3	Exporting	140
7.4	The Future of your Business	148
7.5	Alternative Locations	154
7.6	Skills	157
7.7	Impact of Infrastructure / Investment Initiatives	158
7.8	Building Relationships	160
7.9	Conclusions	163
8	Sunshine NEC – Survey Findings	165
8.1	Introduction	165
8.2	Choosing the Best Location	168
8.3	Exporting	179
8.4	The Future of your Business	186
8.5	Alternative Locations	192
8.6	Skills	195
8.7	Impact of Infrastructure / Investment Initiatives	196
8.8	Building Relationships	198
8.9	Conclusions	202
9	Monash National Employment Cluster - Urbis Findings.....	204
Appendix A:	Broadmeadows MAC	206
Appendix B:	Dandenong South NEC	214
Appendix C:	Fishermans Bend URA.....	222
Appendix D:	La Trobe NEC.....	231
Appendix E:	Sunshine NEC	239

EXECUTIVE SUMMARY

The Metropolitan Planning Authority (MPA), in conjunction with the Department of Economic Development, Jobs, Transport and Resources (DEDJTR), has commissioned Essential Economics Pty Ltd to undertake the Major Precincts Business Intentions Survey (MPBIS) to assist with planning for future growth and development at Broadmeadows Major Activity Centre (MAC), Dandenong South National Employment Cluster (NEC), Fishermans Bend Urban Renewal Area (URA), La Trobe National Employment Cluster (NEC), and Sunshine National Employment Cluster (NEC). The MPBIS complements a survey of the Monash National Employment Cluster (NEC), undertaken by the MPA in 2014.

The MPBIS involved a comprehensive on-line survey to collect feedback from a wide range of businesses located in these precincts. Approximately 1,310 surveys were distributed across the five precincts, with 186 completed surveys returned representing a response rate of approximately 15%.

Key findings of the MPBIS and recommendations are summarised as follows.

A. *Broadmeadows MAC*

- Businesses chose to locate in the Broadmeadows MAC principally due to land availability (35%), cost considerations (22%) and access to markets and supply chains (17%).
- Limitations or drawbacks of the location are lack of accessibility to suppliers (39%), lack of accessibility to clients (39%), and poor accessibility to the precinct by road (35%).
- A majority of businesses surveyed indicate the precinct has a poor reputation (53%), while a lack safety and security is regarded by 43% of respondents as the main limitation of doing business in Broadmeadows MAC.
- Approximately one-half of businesses surveyed (46%) in the Broadmeadows MAC are currently exporting overseas, and an additional one-quarter (23%) of businesses are interested in exporting. Businesses not currently exporting note that the main barrier is related to the high level of competition internationally.
- A lack of access to capital (56%) is the main barrier to expansion for most businesses located in the Broadmeadows MAC.
- The majority of businesses (72%) indicate they are very likely / will remain in the Broadmeadows MAC in the coming 5 years.
- Approximately half the businesses surveyed in the Broadmeadows MAC would be greatly enticed to stay in the precinct through improved utilities (56%), broadband (50%) and road infrastructure (50%).

- Technical skills (67%), management skills (61%) and trade skills (56%) are the main upskilling requirements identified over the next 5 years for Broadmeadows MAC businesses.
- The majority of Broadmeadows MAC businesses have low to moderate levels of engagement (83% combined) with other businesses, services or institutions in the precinct.

B. *Dandenong South NEC*

- Businesses chose to locate in the Dandenong South NEC principally due to land availability (31%) and proximity to business clusters, organisations and institutions (22%).
- Limitations or drawbacks of the location are distance from clients (33%), distance from public transport (25%) and distance from where staff live (19%).
- Approximately one in five businesses surveyed indicate the precinct has a poor reputation (19%), while planning restrictions are regarded by 28% of respondents as the main limitation of doing business in the Dandenong South NEC.
- Approximately one-half of businesses surveyed are currently exporting overseas (53%), and an additional 18% of businesses are interested in doing so. Businesses that are not currently exporting noted the main barrier is related to the high level of competition internationally.
- Compression of margins (43%) is the main barrier to expansion for businesses located in the Dandenong South NEC.
- A total of 43% of businesses are very likely/ will remain in the Dandenong South NEC over the next 5 years.
- Approximately half the businesses surveyed in the Dandenong South NEC (49%) would greatly increase their intention to stay in the precinct through improved broadband.
- Trade skills (56%) and technical skills (46%) are the main upskilling requirements over the next 5 years for Dandenong South NEC businesses.
- The majority of Dandenong South NEC businesses have moderate to extensive levels of engagement (78% combined) with other businesses, services or institutions in the precinct.

C. *Fishermans Bend URA*

- Businesses chose to locate in the Fishermans Bend URA principally due to the precinct's accessibility to customers and markets (25%) and proximity to business clusters, organisations and institutions (25%).
- Limitations or drawbacks of the location are lack of public transport (50%) and distance from where staff live (38%).

- No businesses identified the precinct as having a poor reputation, with occupancy costs regarded by 50% of respondents the main limitation of doing business in the Fishermans Bend URA.
- Approximately one-third of businesses surveyed in the Fishermans Bend URA (31%) are involved in exporting. However, the majority of businesses surveyed were not interested in exporting (56%). Businesses interested in exporting note the main barrier to exporting is related to the high level of competition internationally.
- Access to expansion capital (38%) is the main barrier to expansion for businesses located in the Fishermans Bend URA.
- A total of 33% of businesses are very likely/ will remain in the Fishermans Bend URA over the next 5 years.
- Improved public transport would greatly increase the intention to stay in the precinct for 63% of the Fishermans Bend URA businesses surveyed.
- Management skills (44%) and technical skills (31%) are the main upskilling requirements over the next 5 years for Fishermans Bend URA businesses.
- The majority of Fishermans Bend URA businesses have low to moderate levels of engagement (77% combined) with other businesses, services or institutions in the precinct.

D. *La Trobe NEC*

- Businesses chose to locate in the La Trobe NEC primarily due to cost considerations (27%) and land availability (22%).
- Limitations or drawbacks of the location are distance from clients (29%), distance from where staff live (18%) and lack of accessibility to public transport (18%).
- Approximately one in four businesses surveyed indicate the precinct has a poor reputation (24%), while a lack safety and security is regarded by 36% of respondents as the main limitation of doing business in the La Trobe NEC.
- Approximately one-half of businesses surveyed (47%) in the La Trobe NEC are currently exporting overseas, and an additional 13% of businesses are interested in exporting. Businesses not currently exporting note that the main barrier is related to the high level of competition internationally.
- Compression of margins (36%) is the main barrier to expansion for businesses located in the La Trobe NEC.
- Half the businesses surveyed (50%) indicate they are very likely/ will remain in the La Trobe NEC over the coming 5 years.
- Over half the businesses surveyed in the La Trobe NEC (56%) would be greatly enticed to stay in the precinct through improved broadband.

- Technical skills (67%) are the main upskilling requirement identified over the next 5 years for La Trobe NEC businesses.
- The majority of La Trobe NEC businesses have low to moderate levels of engagement (71% combined) with other businesses, services or institutions in the precinct.

E. Sunshine NEC

- Businesses chose to locate in the Sunshine NEC principally due to proximity to businesses clusters, or organisations and institutions (22%), land availability (16%), and cost considerations (14%).
- Limitations or drawbacks of the location are lack of accessibility to public transport (33%) and distance from senior management place of residence (22%)
- A total of 40% of businesses surveyed indicated the precinct had a poor reputation, while a lack safety and security is regarded by 47% of respondents as the main limitation of doing business in Sunshine NEC.
- Only 28% of businesses in the Sunshine NEC currently export, with a further 22% of businesses interested in exporting. Businesses not currently exporting note that the main barrier is related to the high level of competition internationally.
- A lack of access to expansion capital (37%) is the main barrier to expansion for businesses located in the Sunshine NEC.
- Nearly half of businesses surveyed (49%) indicated they are very likely/ will remain in the Sunshine NEC over the coming 5 years.
- Approximately half the businesses surveyed in the Sunshine NEC (46%) would be greatly enticed to stay in the precinct through improved broadband.
- Technical skills (40%) and trade skills (40%) are the main upskilling requirements identified over the next 5 years for Sunshine NEC businesses.
- The majority of Sunshine NEC businesses have low to moderate levels of engagement (71% combined) with other businesses, services or institutions in the precinct.

F. Comparative Analysis

Tables i to vii provide a comparative assessment of key business survey responses under each topic area. Consistent responses across the majority of precincts (ie at least three out of five) are highlighted in red.

Choosing the best location

Common responses across the five precincts were:

- Main benefits of current location: Ease of access to customers and markets

- Main drawbacks of current location: Distance from clients

Table i: Choosing the Best Location

Question	Broadmeadows NEC	Dandenong South NEC	Fishermans Bend URA	La Trobe NEC	Sunshine NEC
Main reason for choosing current location	Land availability	Land availability	Access to markets and supply chains Proximity to businesses cluster, or organisations and institutions (equal)	Cost considerations	Proximity to businesses cluster, or organisations and institutions
Main benefits of current location	Ease of access to customers and markets	Ease of access to customers and markets	Ease of access to customers and markets	Ease of access to customers and markets	Ease of access to customers and markets
Main drawbacks of current location	Distance from clients Distance from suppliers (equal)	Distance from clients	Distance from public transport	Distance from clients	Distance from public transport

Source: Major Precincts Business Intentions Survey

Exporting

Common responses across the five precincts were:

- Main finance-related barriers to exporting : Currency risk
- Main production-related barriers to exporting: Insufficient production/handling capacity
- Main logistics-related barriers to exporting: Excessive documentation
- Main-market-related barriers to exporting: Insufficient knowledge of contacts
- Main competition-related barriers to exporting: Strong international competition
- Main regulatory-related barriers to exporting: Restrictions imposed by foreign government rules and regulations

Table ii: Exporting

Question	Broadmeadows NEC	Dandenong South NEC	Fishermans Bend URA	La Trobe NEC	Sunshine NEC
Exporting overseas or interested in exporting overseas	69%	71%	44%	53%	50%
Main finance-related barriers to exporting	Currency risk Availability of working capital (equal)	Currency risk	Availability of working capital	Currency risk	Currency risk
Main production-related	Insufficient	Insufficient	Insufficient	Insufficient	Insufficient

Question	Broadmeadows NEC	Dandenong South NEC	Fishermans Bend URA	La Trobe NEC	Sunshine NEC
barriers to exporting	production/ handling capacity	production/ handling capacity	production/ handling capacity Difficulties getting enough raw materials/supplies (equal)	production/ handling capacity	production/ handling capacity
Main logistics-related barriers to exporting	Excessive documentation	Excessive documentation	Excessive documentation	Excessive documentation	Increase in management complexity
Main market-related barriers to exporting	Insufficient knowledge of contacts	Insufficient knowledge of contacts	Insufficient knowledge of contacts	Insufficient knowledge of contacts	Insufficient knowledge of contacts
Main competition- related barriers to exporting	Strong international competition	High transportation costs	Strong international competition	Strong international competition	Strong international competition
Main regulatory-related barriers to exporting	Restrictions imposed by Australian government rules and regulations	Restrictions imposed by foreign government rules and regulations	Restrictions imposed by foreign government rules and regulations	Restrictions imposed by foreign government rules and regulations	Restrictions imposed by Australian government rules and regulations

Source: Major Precincts Business Intentions Survey

The future of your business

Common response across the five precincts was:

- Main barrier to potential expansion: Access to expansion capital

Table iii: Future of the Business

Question	Broadmeadows NEC	Dandenong South NEC	Fishermans Bend URA	La Trobe NEC	Sunshine NEC
Main barrier to potential expansion	Access to expansion capital	Compression of margins	Access to expansion capital	Compression of margins	Access to expansion capital
Expansion or contraction of on-site employment in next 5 years	Expand (56%) Contract (0%)	Expand (46%) Contract (16%)	Expand (75%) Contract (0%)	Expand (59%) Contract (9%)	Expand (49%) Contract (3%)
Stay in this location in the next 5 years	Very likely to stay / will stay here (72%)	Very likely to stay / will stay here (43%)	Very likely to stay / will stay here (44%)	Very likely to stay / will stay here (50%)	Very likely to stay / will stay here (49%)

Source: Major Precincts Business Intentions Survey

Alternative locations

Common response across the five precincts was:

- Main reason for moving out of precinct (in the next 5 years): Lack of expansion potential

Table iv: Alternative Locations

Question	Broadmeadows NEC	Dandenong South NEC	Fishermans Bend URA	La Trobe NEC	Sunshine NEC
If relocating, share of businesses that would be very unlikely to stay in precinct	33%	17%	33%	11%	0%
Main reason for moving out of precinct	Cost considerations	Lack of expansion potential	Cost considerations Consolidation of business operations To be part of an industry cluster (equal)	Lack of expansion potential	Lack of expansion potential Traffic and transport issues Better access to supply chains Better access to customers and markets Due to merger or acquisition (equal)
Alternative locations	None specifically mentioned	Seaford Dingley Cardinia Shire Cranbourne North	Clayton Collingwood Mulgrave	Essendon Heidelberg Heights Fairfield Bundoora	Laverton Tooronga

Source: Major Precincts Business Intentions Survey

Skills

Common response across the five precincts was:

- Main area of anticipated skills shortages over the next 5 years: Technical skills

Table v: Skills

Question	Broadmeadows NEC	Dandenong South NEC	Fishermans Bend URA	La Trobe NEC	Sunshine NEC
Main area of anticipated skills shortages over the next 5 years	Technical skills	Technical skills	Management skills	Technical skills	Technical skills Trade skills (equal)

Source: Major Precincts Business Intentions Survey

Impact of infrastructure/investment initiatives

Common response across the five precincts was:

- What improved infrastructure would have the greatest impact on your decision to remain located in the precinct: Broadband

Table vi: Impact of Infrastructure/Investment Initiatives

Question	Broadmeadows NEC	Dandenong South NEC	Fishermans Bend URA	La Trobe NEC	Sunshine NEC
What improved infrastructure would have the <u>greatest impact</u> on your decision to remain located in the precinct	Utilities	Broadband	Public Transport	Broadband	Broadband

Source: Major Precincts Business Intentions Survey

Building relationships

Common responses across the five precincts were:

- Extent of relationships with other businesses, services or institutions in the precinct: Moderate
- Main business or institutions your business is currently engaging or collaborating with: State Government agencies

Table vii: Building Relationships

Question	Broadmeadows NEC	Dandenong South NEC	Fishermans Bend URA	La Trobe NEC	Sunshine NEC
Extent of relationships with other businesses, services or institutions in the precinct	Low	Moderate	Moderate	Low	Moderate
Main business or institutions your business is currently engaging or collaborating with	State Government agencies	South East Business Network (SEBN)	State Government agencies	State Government agencies	Local Council

Source: Major Precincts Business Intentions Survey

G. Recommendations

Based on the findings of the MPBIS, the following broad recommendations are made with respect to areas of State Government influence:

1. A reduction in regulatory and documentation requirements (national and international) would assist businesses wishing to enter export markets. Additionally, businesses across all precincts would benefit through greater access to relevant export contacts.
2. Improved broadband services would be the most beneficial infrastructure investment across all precincts; however, improved public transport is also of particular importance with regard to the Fishermans Bend and La Trobe precincts.
3. With the exception of the Dandenong South NEC, a relatively low level of business engagement exists within precincts; therefore government measures to improve intra-precinct business relationships would be useful.
4. Specific measures to improve technical skills or access to technical skills would benefit businesses across all precincts in addressing identified short-term skills shortages.
5. Ensuring efficient state and local planning processes are in place will assist business efficiency and costs across all precincts.
6. Where possible, measures to improve safety and security in some precincts (eg Broadmeadows MAC, Sunshine NEC) will help improve the reputation of these precincts from an inward investment perspective.

1 INTRODUCTION

Background

The Metropolitan Planning Authority (MPA), in conjunction with the Department of Economic Development, Jobs, Transport and Resources (DEDJTR), has engaged Essential Economics Pty Ltd to undertake the Major Precincts Business Intentions Survey.

Plan Melbourne nominates a number of significant employment and activity nodes across the metropolitan area that will accommodate many new jobs in the coming years. The Dandenong South, Sunshine and La Trobe National Employment Clusters (NECs), Fishermans Bend Urban Renewal Area (URA) and the Broadmeadows Metropolitan Activity Centre (MAC) are five of those locations.

The MPA has commenced planning for future growth and development at Dandenong South, Sunshine, La Trobe, Fishermans Bend and Broadmeadows. An important part of this planning process is to understand the future intentions of existing businesses with regard to expansion, contraction or relocation. It is also be important to identify the factors that will either encourage or discourage existing businesses to expand, or new businesses to establish in those areas.

This Major Precincts Business Intentions Survey will complement the recently-completed survey undertaken for the Monash NEC on behalf of the MPA. This project will gather comparable data to for the following major metropolitan business and employment precincts:

- Broadmeadows MAC.
- Dandenong South NEC
- Fishermans Bend URA
- La Trobe NEC
- Sunshine NEC

The project has used an on-line survey and follow-up telephone interviews to collect feedback from a wide range of businesses located in these precincts, and the analysis will provide results for each precinct and aggregate the findings which also consider results from the previous Monash NEC survey.

The business intentions survey is based on the following core topics:

- Business location
- Exporting
- Future business needs
- Alternative business locations

- Skills requirements
- Impact of infrastructure and investment initiatives
- Business relationships

Objective

The main objectives of this project are:

- To ascertain intentions with regard to future expansion, contraction or relocation of businesses.
- To explore opportunities and challenges relating to businesses which export or would like to export
- To identify factors that influence employment growth
- To provide recommendations aimed at encouraging future growth in each precinct.

This Report

This report contains the following chapters:

- | | |
|------------|--|
| Chapter 1 | Introduction |
| Chapter 2 | Project Background |
| Chapter 3: | Methodology |
| Chapter 4: | Broadmeadows MAC – Survey Findings |
| Chapter 5: | Dandenong South NEC – Survey Findings |
| Chapter 6: | Fishermans Bend URA – Survey Findings |
| Chapter 7: | La Trobe NEC – Survey Findings: presents |
| Chapter 8: | Sunshine NEC – Survey Findings: presents |
| Chapter 9: | Monash NEC – Summary of 2014 survey findings |

2 PROJECT BACKGROUND

2.1 Plan Melbourne and Plan Melbourne Refresh

Plan Melbourne is a city-wide strategy and a vision for Melbourne, designed to guide the City's housing, commercial and industrial development through to 2050.

The vision for Melbourne is to “be a global city of opportunity and choice”. It is proposed that this will be achieved by protecting the suburbs, developing in defined areas near services and infrastructure, creating a clearer and simpler planning system, rebalancing growth between Melbourne and regional Victoria, and identifying an investment and infrastructure pipeline.

Plan Melbourne refresh provides an opportunity to update Plan Melbourne to reflect current government commitment and priorities.

As part of its new policy agenda, *Plan Melbourne* and *Plan Melbourne refresh* have introduced a greater focus on employment areas outside of Activity Centres, and these areas include National Employment Clusters.

2.2 National Employment Clusters

National employment clusters are designated geographic concentrations of interconnected businesses and institutions that make a major contribution to the national economy.

Six employment clusters are identified in *Plan Melbourne* that can, or have the potential to, provide high job concentrations in suburban locations.

Three of these national employment clusters (Parkville, Monash and Dandenong South) are already well-established and include large numbers of businesses and institutions with high levels of employment.

The remaining three national employment clusters are designated as emerging (La Trobe East, Werribee and Sunshine) due to their business potential and geographic opportunity.

2.3 State Government Role in Precinct Development

The Metropolitan Planning Authority (MPA) and the Department of Economic Development, Jobs, Transport and Resources (DEDJTR) are responsible for undertaking assessments and making recommendations to the Minister for Planning about each National Employment Cluster.

2.4 Need for Business Intelligence

As part of the assessment of each National Employment Cluster, it is critically important that authorities receive feedback from existing businesses in each precinct in order to provide a

robust planning framework. This includes feedback on factors such as strengths and weaknesses of location, barriers to exporting, future expansion plans and land requirements, and skills and infrastructure requirements.

2.5 Summary

Plan Melbourne and *Plan Melbourne refresh* introduced a greater focus on National Employment Clusters, which are designated concentrations of interconnected businesses and institutions that make a major contribution to the national economy. The MPA and DEDJTR are responsible for undertaking assessments and making recommendations on each National Employment Cluster. This project will assist the MPA and DEDJTR by gathering feedback from existing businesses in each designated national employment cluster. The purpose of this project is to understand the future intentions of existing businesses with regard to expansion, contraction or relocation, in order to identify the factors that will either encourage or discourage existing businesses to expand, or new businesses to establish in those areas.

3 METHODOLOGY

3.1 On-Line Survey

The Survey Monkey on-line tool was used to collect business survey responses. A web link was provided to the client and the MPA/ DEDJTR subsequently distributed the link with background material to contacts from internal databases.

The online survey was available to respondents from 4 April 2016 until 17 June 2016.

3.2 Survey Distribution

The survey was distributed to a total of 1,311 businesses from DEDJTR's internal databases. The composition of contacts the survey was sent to in each precinct is as follows:

- Broadmeadows MACs – 235 surveys distributed
- Dandenong South NEC – 730 surveys distributed
- Fishermans Bend URA – 105 surveys distributed
- La Trobe NEC – 147 surveys distributed
- Sunshine NEC – 94 surveys distributed

3.3 Questionnaire

The following core themes and associated questions formed part of the survey. A number of business profile questions were also asked and responses are included in the appendices.

A. Choosing the best location for your business

1. What was the primary reason for your business moving to its current location?
2. What are the key benefits or strengths of the current location of your premises?
3. What do you think are the main limitations or drawbacks of your current location?
4. What do you think are the main image/reputation/relationship limitations or drawbacks of your current location?
5. Are there any design/features of the site/building that are a drawback to your current location?
6. What are the main costs/other limitations or drawbacks of your current location?

B. Exporting

7. Does your business currently export goods or services overseas, or is your business interested in exporting?
8. What are the main finance-related barriers to exporting that face your business?
9. What are the main production-related barriers to exporting that face your business?
10. What are the main logistics-related barriers to exporting that face your business?
11. What are the main market-related barriers to exporting that face your business?
12. What are the main competition-related barriers to exporting that face your business?
14. Are there any other barriers to exporting that face your business e.g. human resources-related?

C. The Future of Your Business

15. What are the main barriers to potential expansion (if any)?
16. In the next 5 years do you anticipate that the number of employees on-site will expand or contract?
17. How likely is your business to stay in its current location over the next 5 years?
18. If your business is likely to stay in this location over the next 5 years, what additional land area will be required for expansion purposes?

D. Alternative Locations

19. If your business was to move from its current location, how likely is the business to remain in the (name location)?
20. What would be your main reasons for moving out of the (name location)?
21. What alternative locations would you seriously consider for your business?

E. Skills

22. Thinking about your workforce over the next 5 years, what particular skill shortages may affect your business and require up-skilling?

F. Impact of infrastructure/investment initiatives

- 23. To what extent would improved road infrastructure support your business and encourage you to stay in the precinct?
- 24. To what extent would improved public transport infrastructure support your business and encourage you to stay in the precinct?
- 25. To what extent would improved broadband (e.g. access to the National Broadband Network) support your business and encourage you to stay in the precinct?
- 26. To what extent would improved utilities infrastructure (e.g. gas, electricity, water, sewerage) support your business and encourage you to stay in the precinct?

G. Building relationships

- 27. How would you rate the extent of relationships your business has with other businesses, services or institutions in the precinct?
- 28. How would you rate the extent of relationships your business has with other businesses, services or institutions in the precinct?
- 29. What else, if anything, would make the precinct a more attractive location for your business in the future?

3.4 Follow-Up Activities

Essential Economics, MPA and DEDJTR each undertook follow-up telephone calls to businesses across each precinct to provide further opportunities for businesses to participate in the study, either by reminding the business of the survey/web link or by undertaking the survey on the telephone with the respondent. These follow-up activities enhanced the number of responses in each precinct.

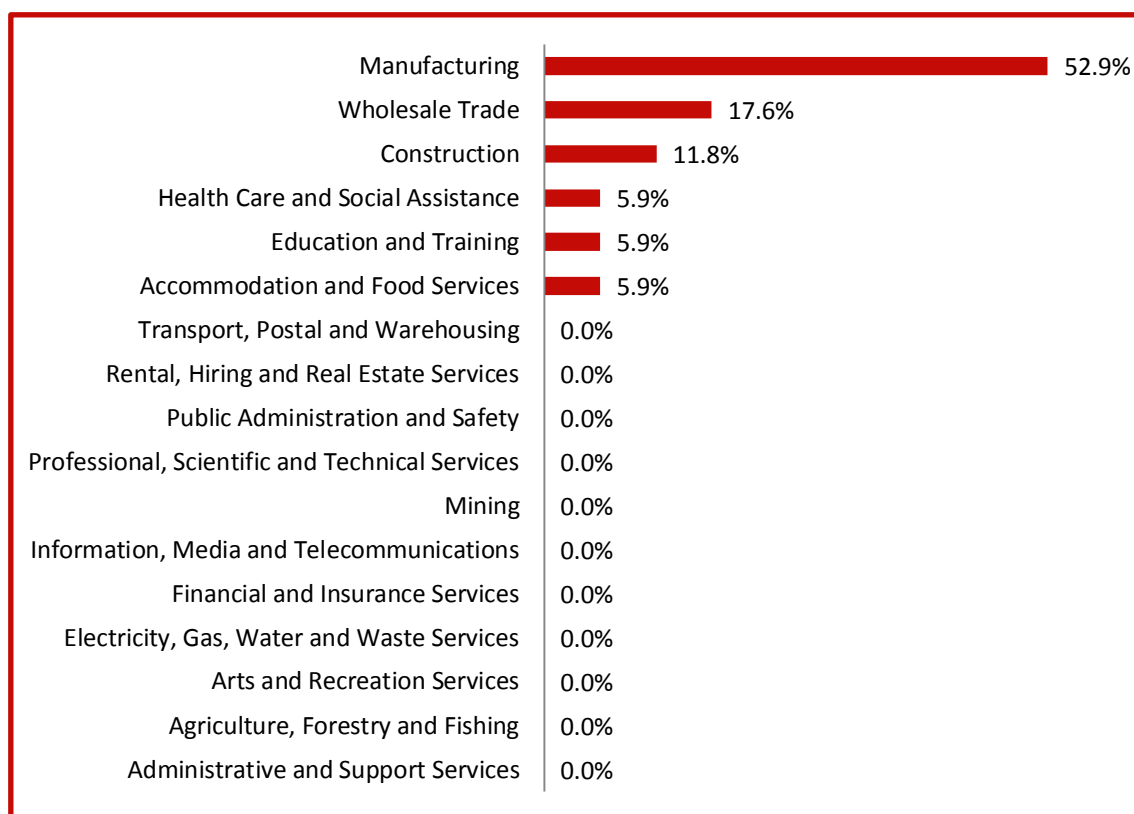
4 BROADMEADOWS MAC – SURVEY FINDINGS

4.1 Introduction

The online business intentions survey was distributed to 235 businesses in the Broadmeadows MAC, and a total of 23 responses were received. This represents a response rate of approximately 10%.

Just over one-half of the business respondents were associated with the manufacturing industry (53%), followed by wholesale trade businesses (18%), construction businesses (12%), health care and social assistance organisations (6%), education and training organisations (6%), and accommodation and food services (6%).

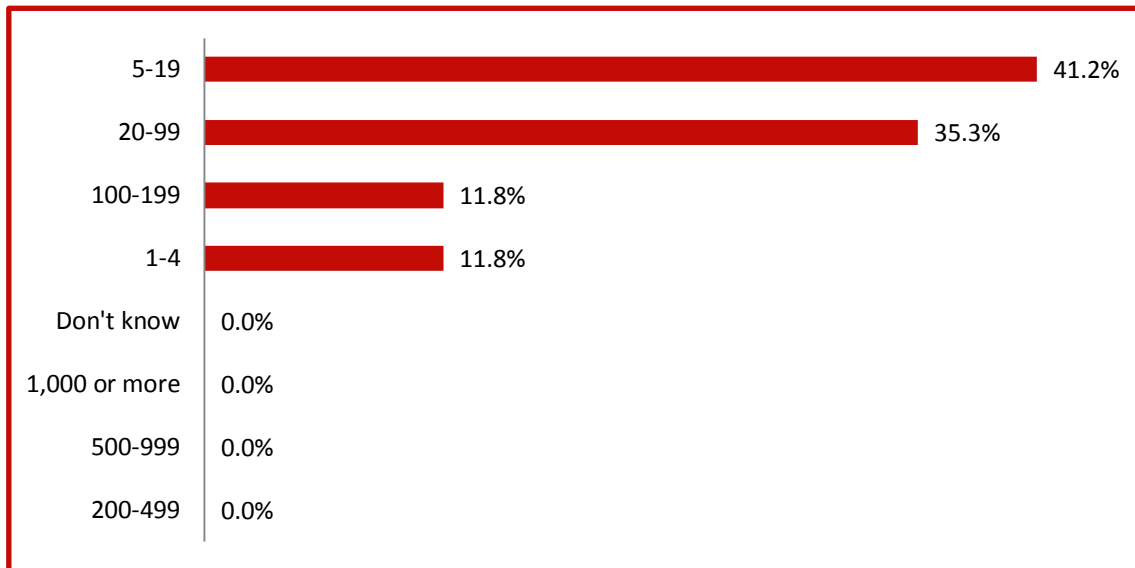
Figure 4.1: Broadmeadows MAC – Business Profile of Survey Respondents



Source: Broadmeadows MAC Business Intentions Survey

The majority of respondents were small to medium-sized businesses having between 5-99 on-site employees (76%). A small share of respondents (12%) were micro-businesses, and a similar share (12%) were large businesses with 100-199 on-site employees.

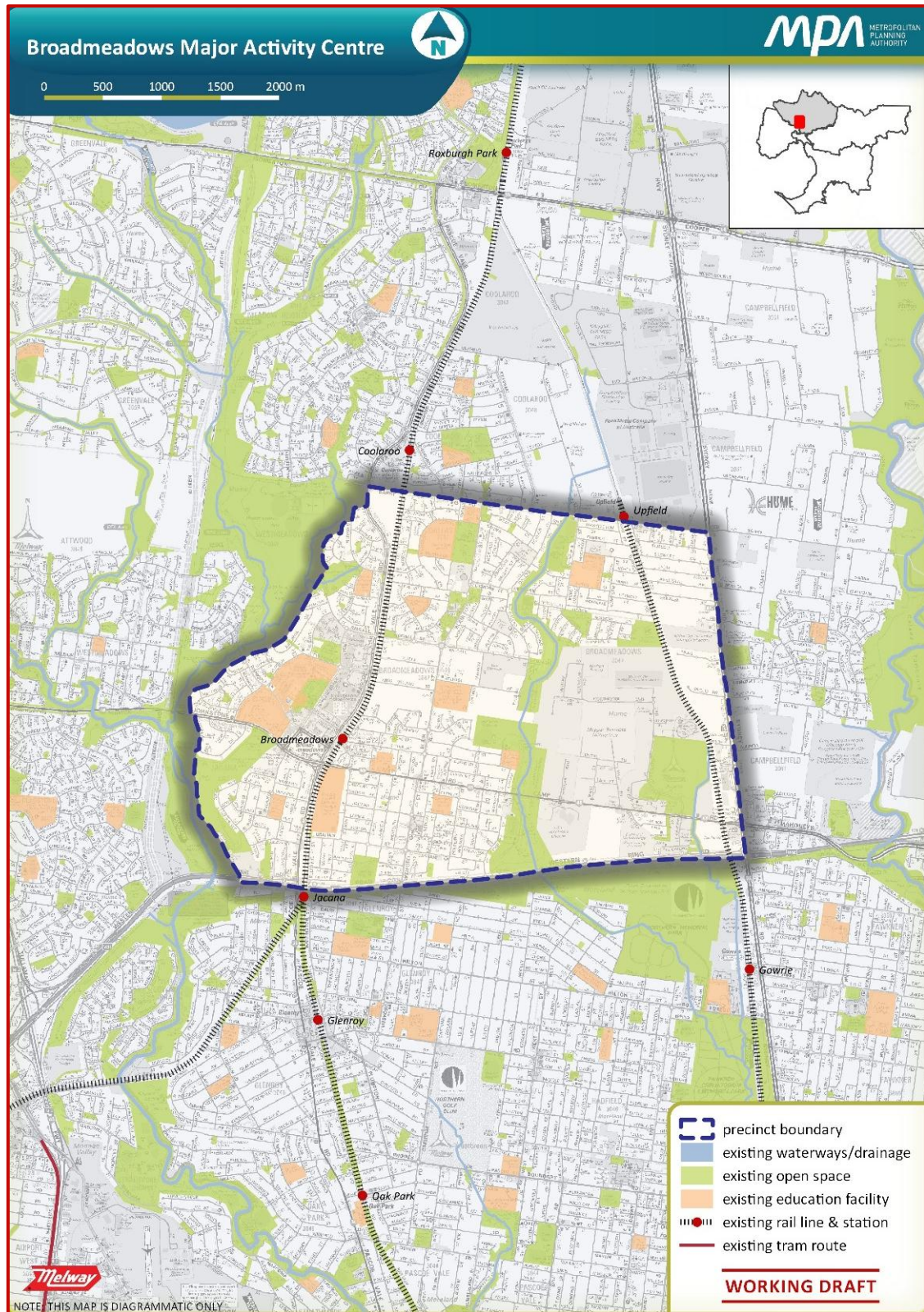
Figure 4.2: Broadmeadows MAC – Business Size of Survey Respondents



Source: Broadmeadows MAC Business Intentions Survey

Figure 4.3 outlines the boundaries of the Broadmeadows MAC study, while Sections 4.2 to 4.8 provide a summary of survey results.

Figure 4.3: Broadmeadows Metropolitan Activity Centre – Precinct Location



Source: Metropolitan Planning Authority

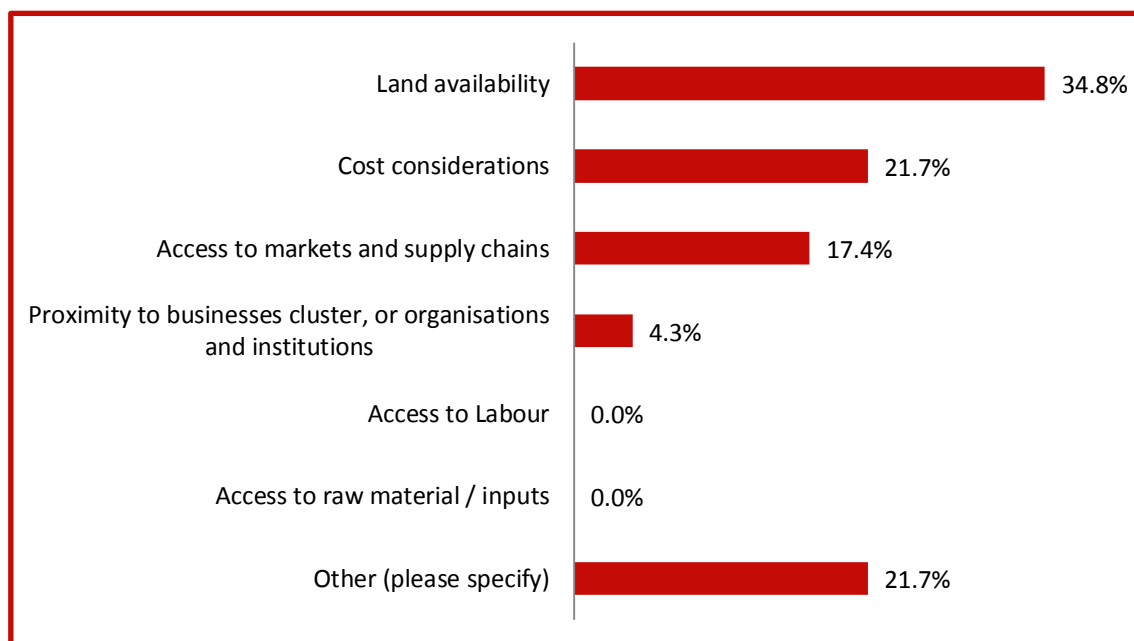
4.2 Choosing the Best Location

Question 1: What was the primary reason for your business moving to its current location?

The online survey explored reasons as to why businesses chose to locate in Broadmeadows MAC. The most frequent responses were as follows:

A total of 35% of businesses surveyed were influenced by the land available, 22% were influenced by cost considerations, and 17% were influenced by the location's access to markets and supply chains.

Figure 4.4: Primary reason for businesses to move to its current location



Source: Broadmeadows MAC Business Intentions Survey

Table 4.1: Primary reason for businesses to move to its current location

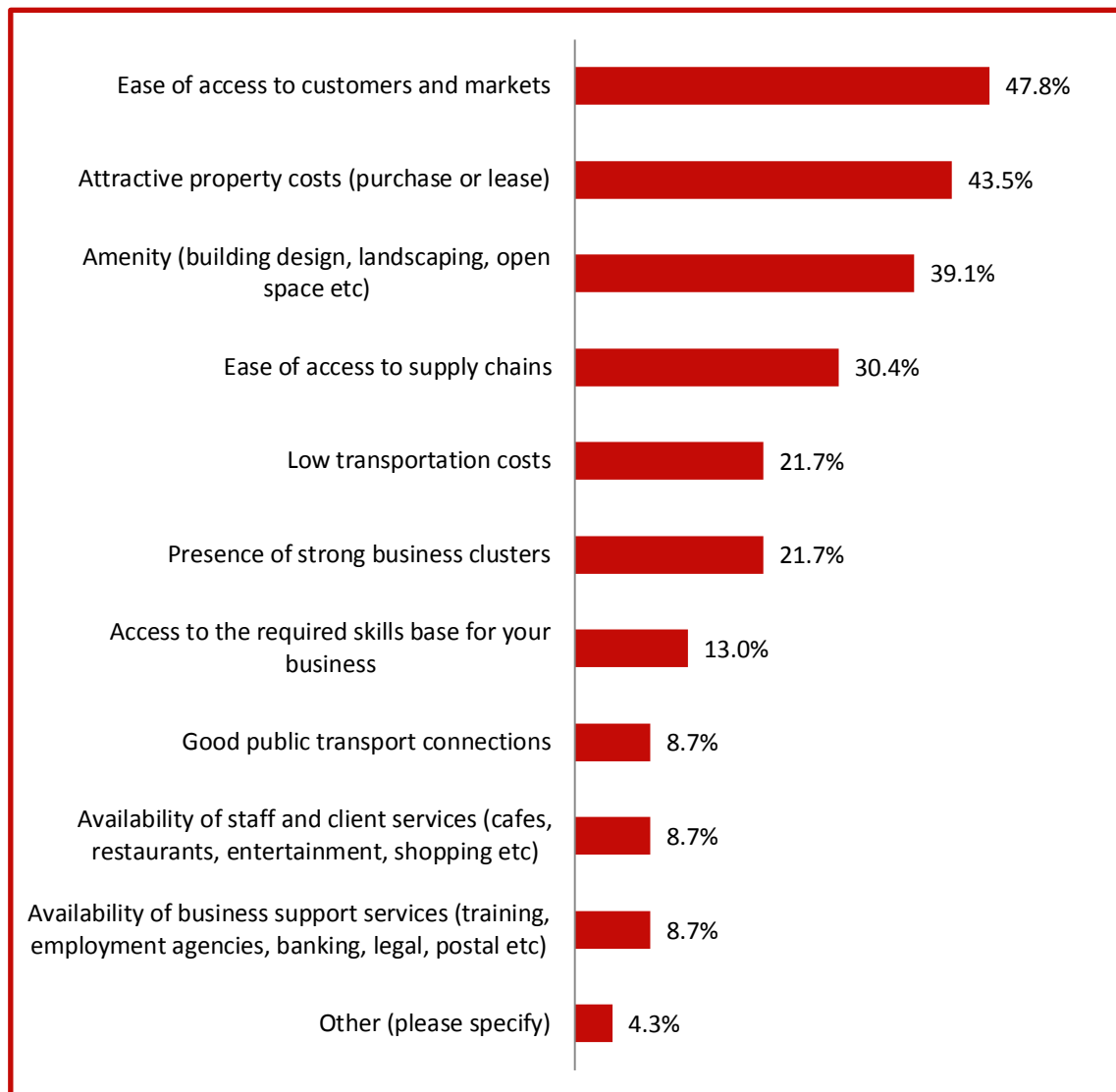
Answer Options	Response Share	Response Count
Land availability	34.8%	8
Cost considerations	21.7%	5
Access to markets and supply chains	17.4%	4
Proximity to businesses cluster, or organisations and institutions	4.3%	1
Access to raw material / inputs	0.0%	0
Access to Labour	0.0%	0
Other (please specify)		
<ul style="list-style-type: none"> • Access to disadvantaged community • Live close by • Location • I'm doing the administrative aspects of my business mostly from home. • Close to all senior employees 	21.7%	5
Answered question	100.0%	23
Skipped question		0

Source: Broadmeadows MAC Business Intentions Survey. Percentages rounded.

Question 2: What are the key benefits or strengths of the current location of your premises?

Businesses surveyed indicated that the key benefits or strengths of Broadmeadows MAC relate to the location's ease of access to customers and markets (48%), attractive property costs (44%), and amenity (40%).

Figure 4.5: Key benefits or strength of the current location (multi-response)



Source: Broadmeadows MAC Business Intentions Survey

Table 4.2: Key benefits or strength of the current location (multi-response)

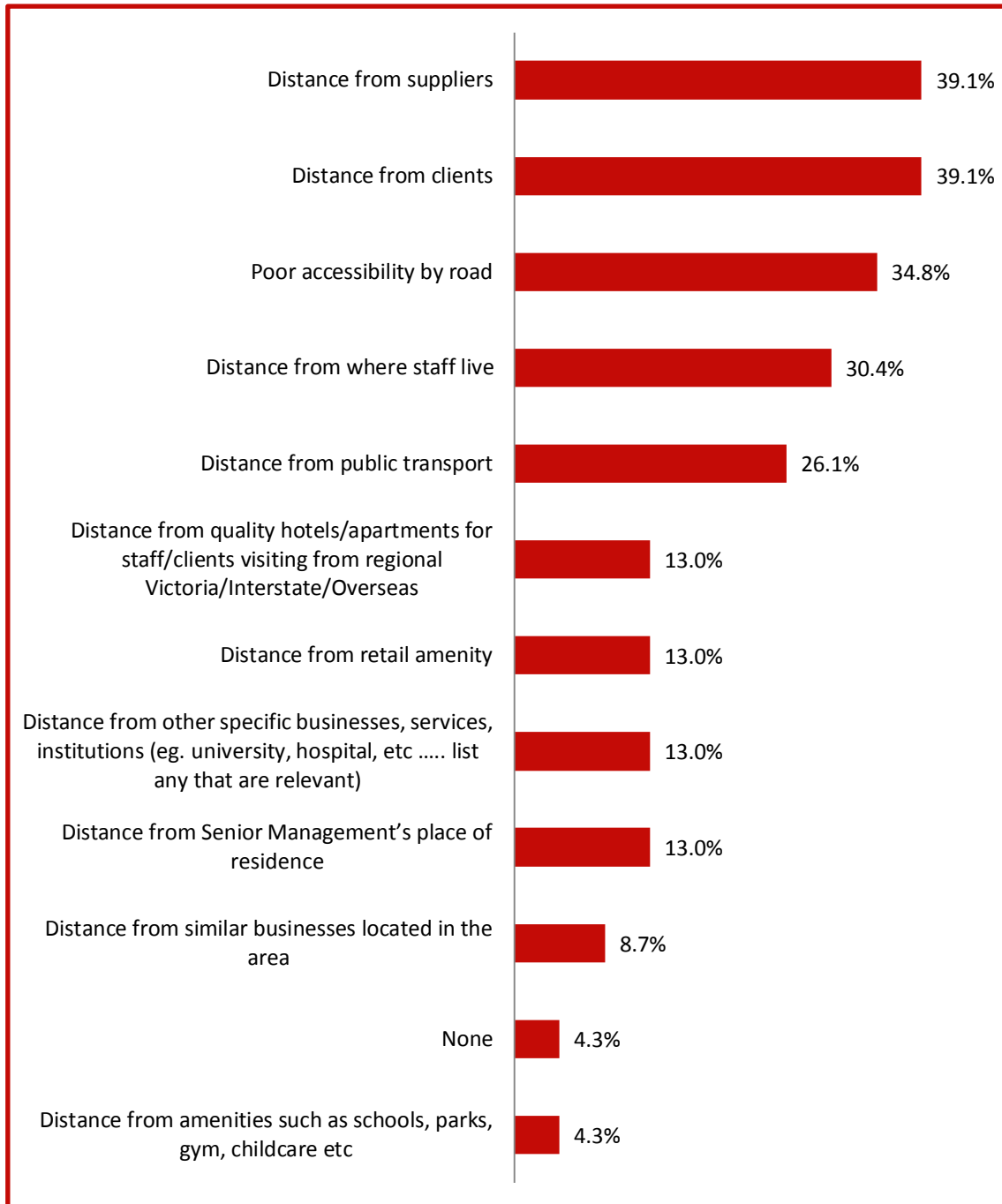
Answer Options	Response Share	Response Count
Ease of access to customers and markets	47.8%	11
Attractive property costs (purchase or lease)	43.5%	10
Amenity (building design, landscaping, open space etc)	39.1%	9
Ease of access to supply chains	30.4%	7
Presence of strong business clusters	21.7%	5
Low transportation costs	21.7%	5
Access to the required skills base for your business	13.0%	3
Availability of business support services (training, employment agencies, banking, legal, postal etc)	8.7%	2
Availability of staff and client services (cafes, restaurants, entertainment, shopping etc)	8.7%	2
Good public transport connections	8.7%	2
Other (please specify)		
<ul style="list-style-type: none"> • Been in the area for 30 years, know our customers 	4.3%	1
Answered question		23
Skipped question		0

Source: Broadmeadows MAC Business Intentions Survey

Question 3: What do you think are the main locational limitations or drawbacks of your current location?

Businesses surveyed indicated that the main limitations or drawbacks at Broadmeadows relate to the location's distance from clients (39%), distance from suppliers (39%), and distance from where staff live (30%).

Figure 4.6: Main locational limitations or drawbacks of the current location (multi-response)



Source: Broadmeadows MAC Business Intentions Survey

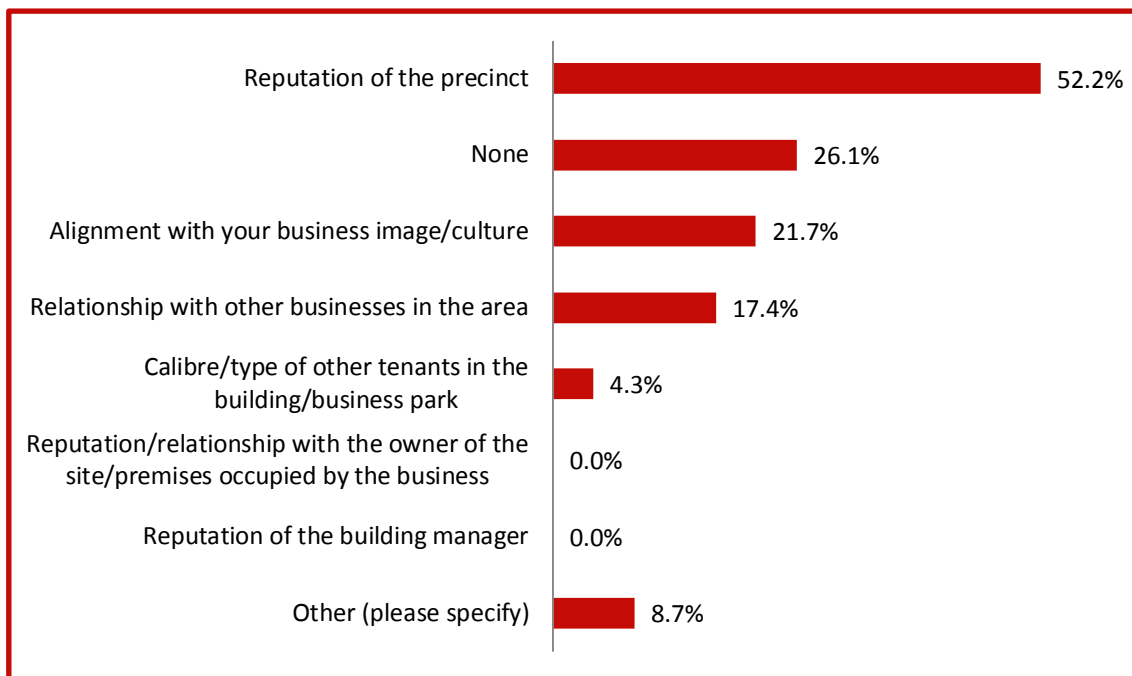
Table 4.3: Main locational limitations or drawbacks of the current location (multi-response)

Answer Options	Response Share	Response Count
Distance from clients	39.1%	9
Distance from suppliers	39.1%	9
Poor accessibility by road	34.8%	8
Distance from where staff live	30.4%	7
Distance from public transport	26.1%	6
Distance from Senior Management's place of residence	13.0%	3
Distance from other specific businesses, services, institutions (e.g. University, hospital, etc (List any that are relevant)	13.0%	3
Distance from retail amenity	13.0%	3
Distance from quality hotels/apartments for staff/clients visiting from regional Victoria/Interstate/Overseas	13.0%	3
Distance from similar businesses located in the area	8.7%	2
Distance from amenities such as schools, parks, gym, childcare etc	4.3%	1
None	4.3%	1
Other (please specify)		
<ul style="list-style-type: none"> Lack of available parking Road networks Poor government assistance as compared to regional locations 	13.0%	3
Answered question		23
Skipped question		0

Source: Broadmeadows MAC Business Intentions Survey

Question 4: What do you think are the main image/reputation/relationship limitations or drawbacks of your current location?

Businesses surveyed indicated the main limitations relating to Broadmeadows MAC are the location's reputation (52%) and image/culture (22%). However, 26% of businesses surveyed did not note any image/reputation/relationship limitations at Broadmeadows.

Figure 4.7: Main image/reputation/relationship limitations of the current location (multi-response)

Source: Broadmeadows MAC Business Intentions Survey

Table 4.4: Main image/reputation/relationship limitations of the current location

Answer Options	Response Share	Response Count
Reputation of the precinct	52.2%	12
None	26.1%	6
Alignment with your business image/culture	21.7%	5
Relationship with other businesses in the area	17.4%	4
Calibre/type of other tenants in the building/business park	4.3%	1
Reputation/relationship with the owner of the site/premises occupied by the business	0.0%	0
Reputation of the building manager	0.0%	0
Other (please specify)	8.7%	2
• Olsen place is a 60 year establishment		
• Broadmeadows has a bad reputation		
Answered question		23
Skipped question		0

Source: Broadmeadows MAC Business Intentions Survey

Question 5: Are there any design/features of the site/building that are a drawback to your current location?

Business owners were asked to indicate any design features of the site or building that may be a limitation to their location. The majority of businesses surveyed indicated no such limitations existed (30%), while others noted that the (lack of) availability of parking for clients/customers (26%) and the (small or limited) size of the site (22%) are drawbacks to their current location.

Figure 4.8: Design/features of the site/building that are a drawback to the current location (multi-response)



Source: Broadmeadows MAC Business Intentions Survey

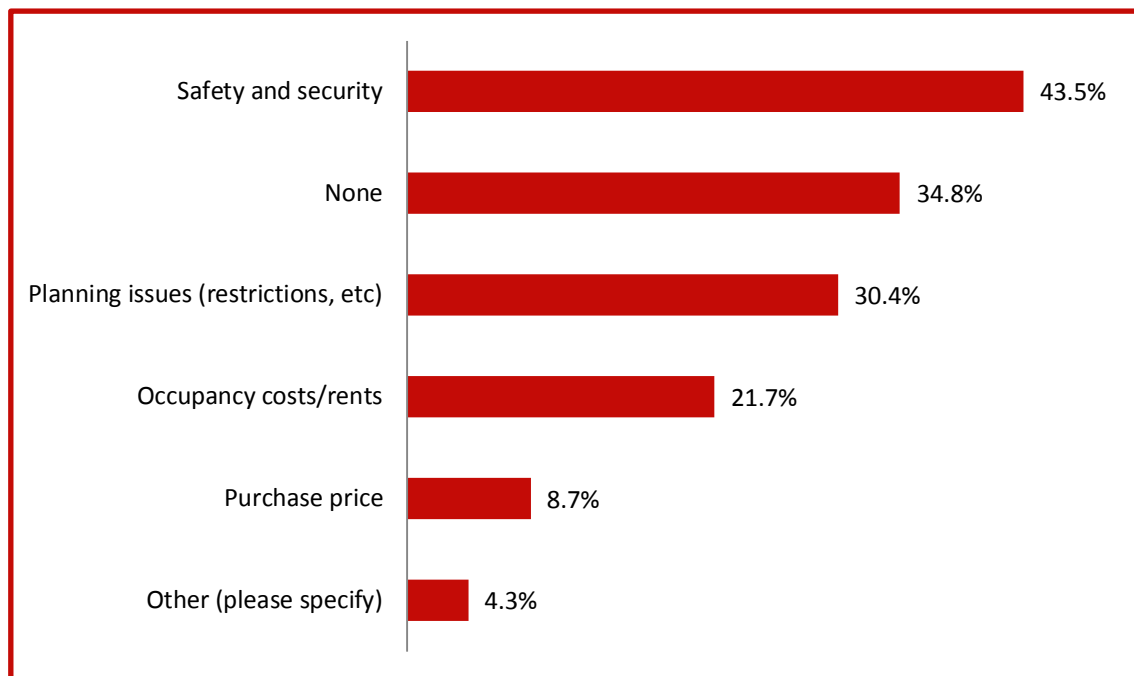
Table 4.5: Design/features of the site/building that are a drawback to the current location (multi-response)

Answer Options	Response Share	Response Count
None	30.4%	7
Availability of parking for clients/customers	26.1%	6
Size of site/premises	21.7%	5
Availability of parking for staff	21.7%	5
Ability to have purpose-built premises	13.0%	3
IT infrastructure	13.0%	3
Quality/style of building/accommodation	13.0%	3
Green rating/sustainability initiatives	8.7%	2
Quality/style of fit-out	8.7%	2
Other (please specify)		
• Low power availability	4.3%	1
Answered question		23
Skipped question		0

Source: Broadmeadows MAC Business Intentions Survey

Question 6: What are the main costs/other limitations or drawbacks of your current location?

The main limitations of the current location for businesses are related to safety and security issues (44%) and planning issues (30%). However, just over one-third (35%) of businesses surveyed indicated they do not have any costs or other limitations at their current location.

Figure 4.9: Main costs/other limitations or drawbacks of the current location (multi-response)

Source: Broadmeadows MAC Business Intentions Survey

Table 4.6: Main costs/other limitations or drawbacks of the current location (multi-response)

Answer Options	Response Share	Response Count
Safety and security	43.5%	10
None	34.8%	8
Planning issues (restrictions, etc)	30.4%	7
Occupancy costs/rents	21.7%	5
Purchase price	8.7%	2
Other (please specify)	4.3%	1
<ul style="list-style-type: none"> Lack of low cost waste treatment options 		
Answered question		23
Skipped question		0

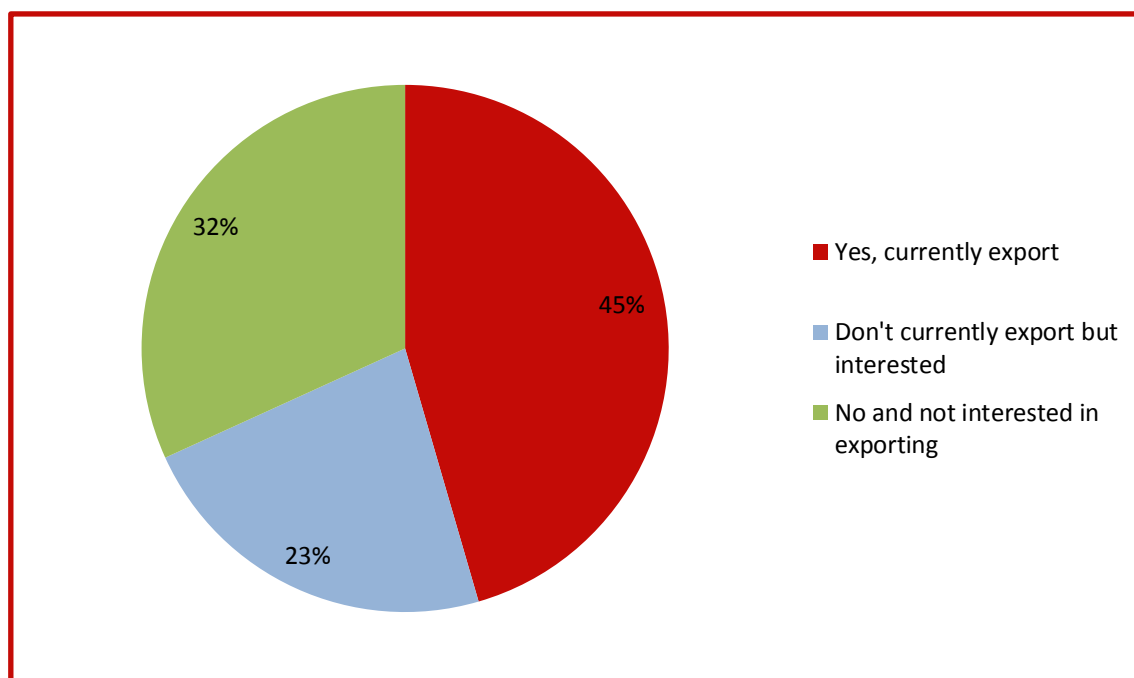
Source: Broadmeadows MAC Business Intentions Survey

4.3 Exporting

Question 7: Does your business currently export goods or services overseas, or is your business interested in exporting?

Of the businesses surveyed, 46% currently export overseas, 23% are not currently exporting but are interested in exporting in the future, and 32% have no interest in exporting.

Figure 4.10: Businesses currently exporting goods and services overseas



Source: Broadmeadows MAC Business Intentions Survey

Table 4.7: Businesses currently exporting goods and services overseas

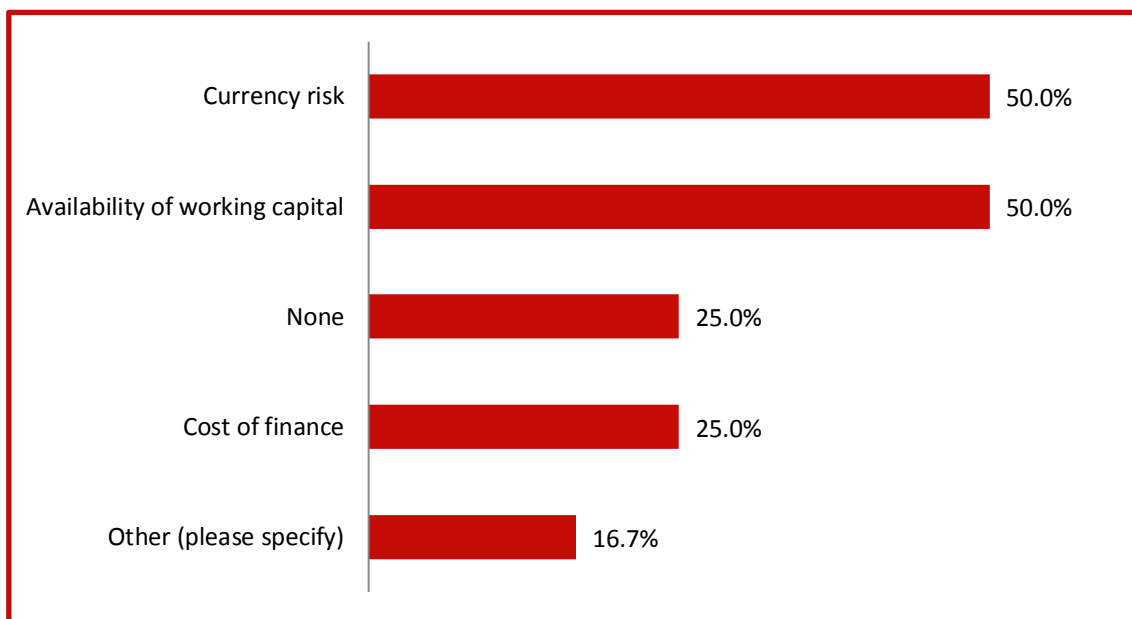
Answer Options	Response Share	Response Count
Yes, currently export	45.5%	10
Don't currently export but interested	22.7%	5
No and not interested in exporting	31.8%	7
Answered question		22
Skipped question		1

Source: Broadmeadows MAC Business Intentions Survey

Question 8: What are the main finance-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. One-half of the respondents nominated the availability of working capital (50%) and currency risk (50%) as the main financial barriers to exporting.

Figure 4.11: Main finance-related barriers to exporting (multi-response)



Source: Broadmeadows MAC Business Intentions Survey

Table 4.8: Main finance-related barriers to exporting (multi-response)

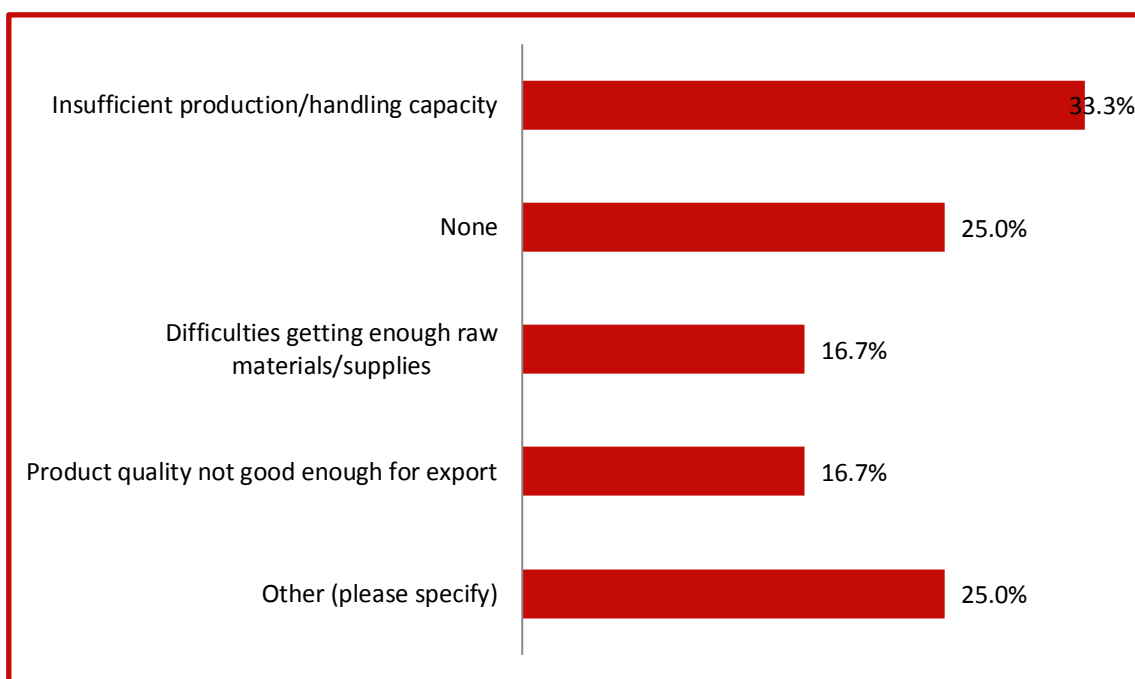
Answer Options	Response Share	Response Count
Availability of working capital	50.0%	6
Currency risk	50.0%	6
Cost of finance	25.0%	3
None	25.0%	3
Other (please specify)	16.7%	2
• Cost of labour, services and infrastructure.		
• Shipping		
Answered question		12
Skipped question		11

Source: Broadmeadows MAC Business Intentions Survey

Question 9: What are the main production-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The main production-related barrier to exporting facing businesses is insufficient production/handling capacity (33%). Others also mentioned that they were not competitive with the Chinese market due to high costs of local raw material, high costs of production, and currency fluctuations. However, 25% of businesses surveyed indicated they have not experienced any production-related barriers to exporting.

Figure 4.12: Production-related barriers to exporting (multi-response)



Source: Broadmeadows MAC Business Intentions Survey

Table 4.9: Production-related barriers to exporting (multi-response)

Answer Options	Response Share	Response Count
Insufficient production/handling capacity	33.3%	4
Difficulties getting enough raw materials/supplies	16.7%	2
Product quality not good enough for export	16.7%	2
None	25.0%	3
Other (please specify)	25.0%	3
• Not competitive to Chinese market due to high costs of raw		
Local raw material and high cost of energy to produce		
• Lack of good quality staff		
• Currency fluctuations		

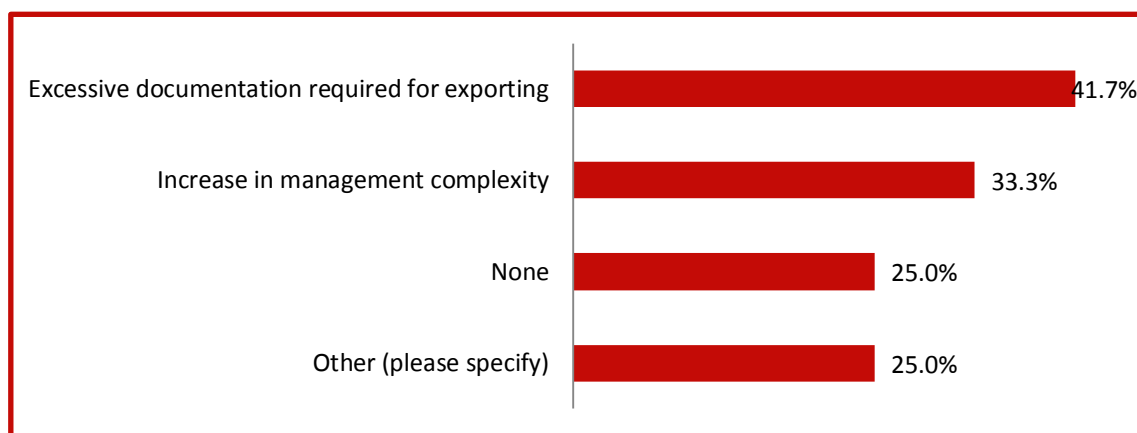
Answered question	12
Skipped question	11

Source: Broadmeadows MAC Business Intentions Survey

Question 10: What are the main logistics-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents noted the main logistics-related barriers to exporting are the excessive documentation required (42%), and the increase in management complexity (33%). However, 25% of businesses surveyed indicated they have not experienced any logistics-related barriers to exporting.

Figure 4.13: Logistics-related barrier to exporting



Source: Broadmeadows MAC Business Intentions Survey

Table 4.10: Logistics-related barrier to exporting (multi-response)

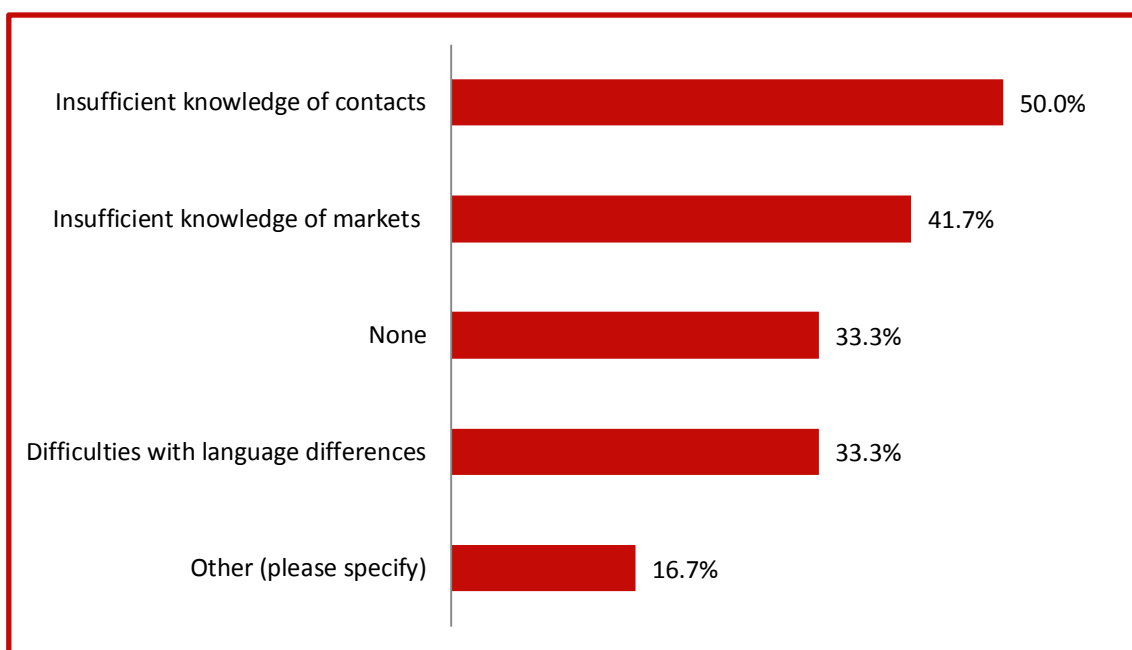
Answer Options	Response Share	Response Count
Excessive documentation required for exporting	41.7%	5
Increase in management complexity	33.3%	4
None	25.0%	3
Other (please specify)	25.0%	3
• Shipping Costs Overseas Competition		
• not competitive with price but very competitive with quality		
• Cost of domestic transportation and government charges		
Answered question		12
Skipped question		11

Source: Broadmeadows MAC Business Intentions Survey

Question 11: What are the main market-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents noted that the main market-related barriers to exporting are an insufficient knowledge of contacts (50%), insufficient knowledge of markets (42%), and difficulties with language differences (33%). However, 33% of businesses surveyed indicated they have not experienced any market-related barriers to exporting.

Figure 4.14: Market-related barriers to exporting (multi-response)



Source: Broadmeadows MAC Business Intentions Survey

Table 4.11: Market-related barriers to exporting (multi-response)

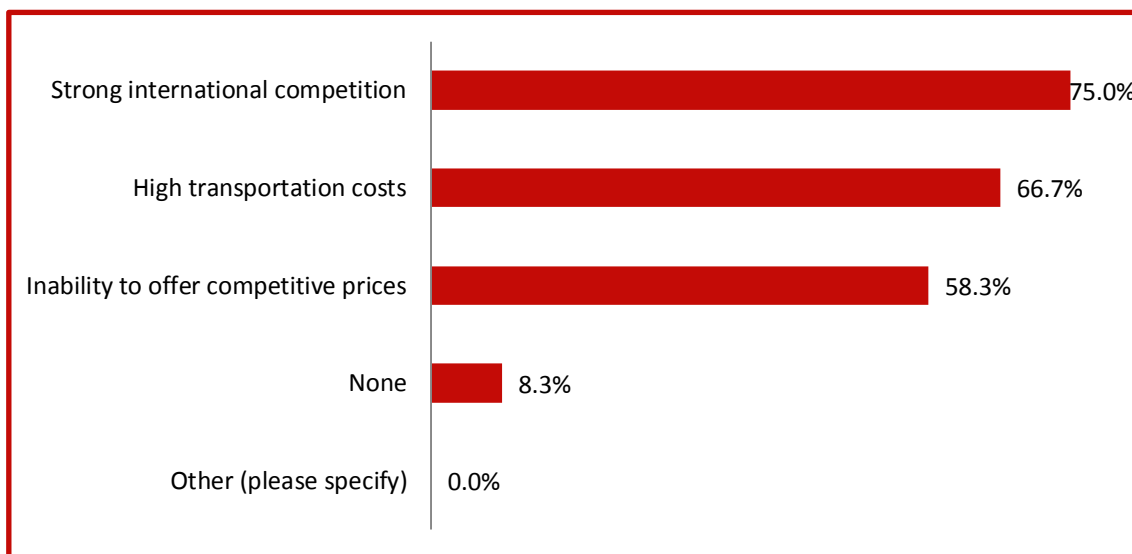
Answer Options	Response Share	Response Count
Insufficient knowledge of markets	41.7%	5
Insufficient knowledge of contacts	50.0%	6
Difficulties with language differences	33.3%	4
None	33.3%	4
Other (please specify)	16.7%	2
• Price		
• Lack of government assistance in finding /assessing export based businesses		
Answered question		12
Skipped question		11

Source: Broadmeadows MAC Business Intentions Survey

Question 12: What are the main competition-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents noted the main competition-related barriers to exporting are strong international competition (75%), high transportation costs (67%), and an inability to offer competitive prices (58%).

Figure 4.15: Competition-related barriers to exporting (multi-response)



Source: Broadmeadows MAC Business Intentions Survey

Table 4.12: Competition-related barriers to exporting (multi-response)

Answer Options	Response Share	Response Count
Strong international competition	75.0%	9
Inability to offer competitive prices	58.3%	7
High transportation costs	66.7%	8
None	8.3%	1
Other (please specify)	0.0%	0
Answered question		12
Skipped question		11

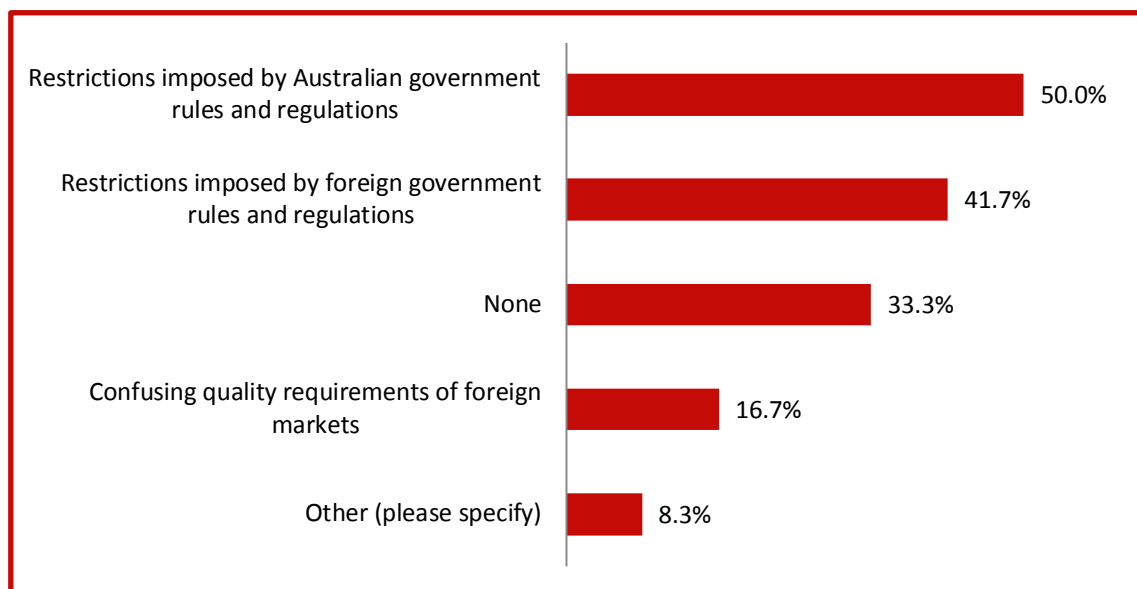
Source: Broadmeadows MAC Business Intentions Survey

Question 13: What are the main regulatory impediments to exporting that face your business?

The survey allowed respondents to select more than one answer. One-half of all respondents noted the main regulatory impediments to exporting are restrictions imposed by Australian government rules and regulations (50%), while 42% of respondents identified restrictions

imposed by foreign government rules and regulations (42%) as an impediment. However, 33% of businesses surveyed indicated they have not experienced any market-related barriers to exporting.

Figure 4.16: Regulatory impediments to exporting (multi-response)



Source: Broadmeadows MAC Business Intentions Survey

Table 4.13: Regulatory impediments to exporting (multi-response)

Answer Options	Response Share	Response Count
Restrictions imposed by foreign government rules and regulations	41.7%	5
Confusing quality requirements of foreign markets	16.7%	2
Restrictions imposed by Australian government rules and regulations	50.0%	6
None	33.3%	4
Other (please specify)		
<ul style="list-style-type: none"> Duty free from other countries to import goods in Australia and you export they have to pay duty 	8.3%	1
Answered question		12
Skipped question		11

Source: Broadmeadows MAC Business Intentions Survey

Question 14: Are there any other barriers to exporting that face your business e.g.: human resources related?

The majority of businesses surveyed skipped this question. The few that responded indicated no other barriers to exporting, except for one respondent who noted a lack of good quality staff.

Table 4.14: Other barriers that face businesses

Response Number	Response Text
1	None
2	None
3	None
4	Lack of good quality staff.

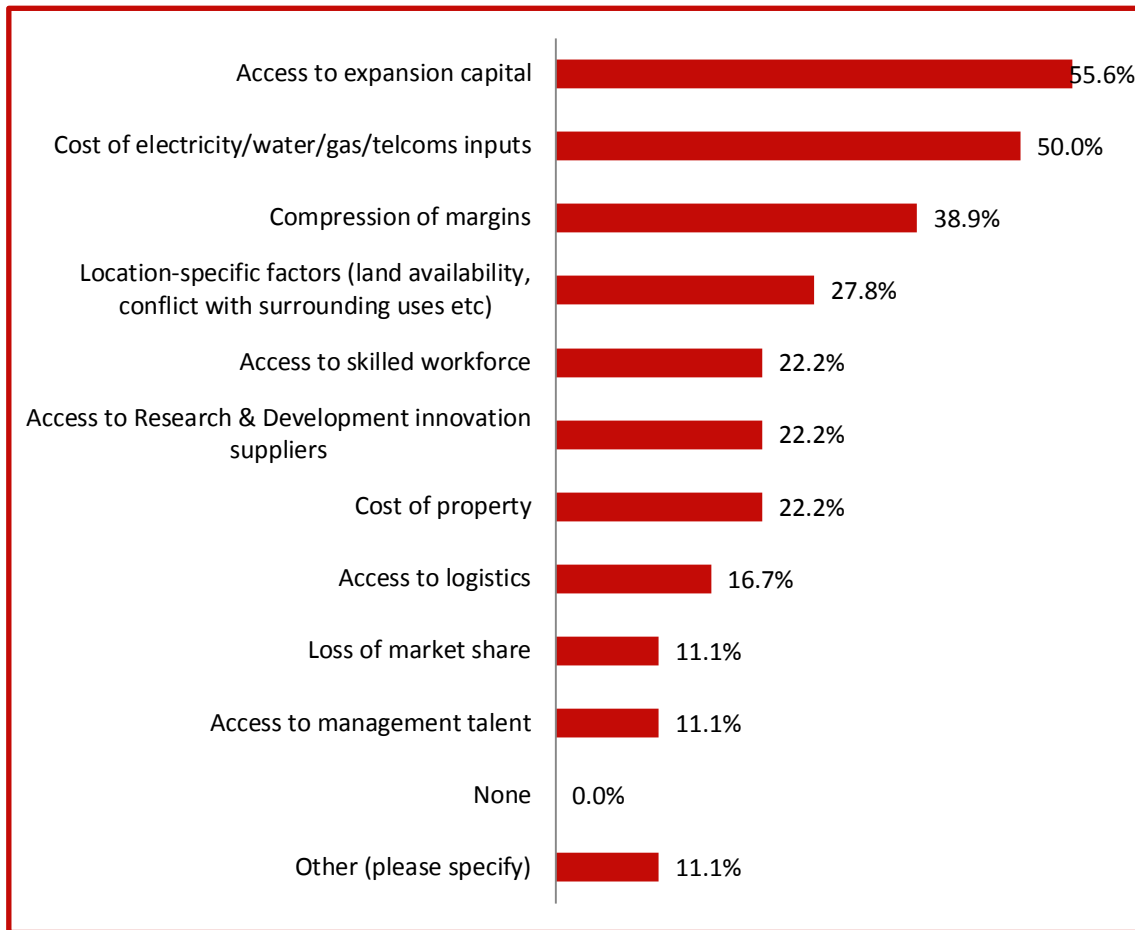
Source: Broadmeadows MAC Business Intentions Survey

4.4 The Future of your Business

Question 15: What are the main barriers to potential expansion (if any)?

The survey allowed respondents to select more than one answer. Businesses surveyed identified the main barriers to potential expansion are related to access to expansion capital (56%), cost of electricity/water/gas/telecoms inputs (50%), and the compression of margins (39%).

Figure 4.17: Main barriers to potential expansion (multi-response)



Source: Broadmeadows MAC Business Intentions Survey

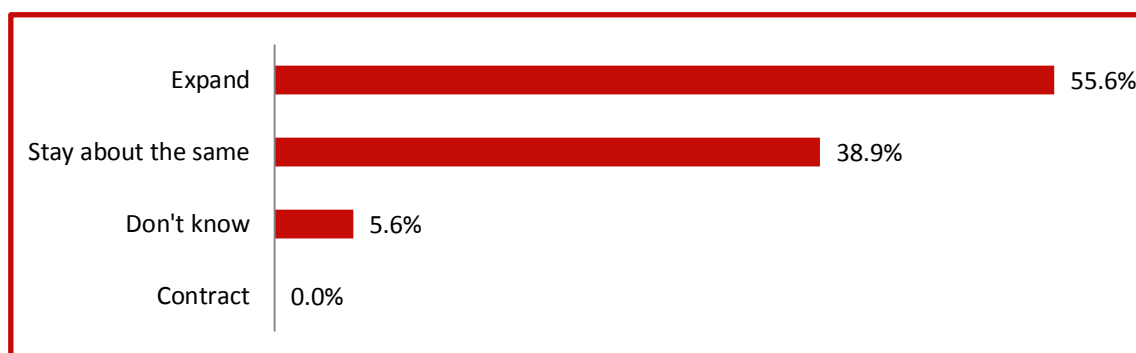
Table 4.15: Main barriers to potential expansion (multi-response)

Answer Options	Response Share	Response Count
Access to expansion capital	55.6%	10
Cost of electricity/water/gas/telecoms inputs	50.0%	9
Compression of margins	38.9%	7
Location-specific factors (land availability, conflict with surrounding uses etc)	27.8%	5
Access to skilled workforce	22.2%	4
Access to Research & Development innovation suppliers	22.2%	4
Cost of property	22.2%	4
Access to logistics	16.7%	3
Loss of market share	11.1%	2
Access to management talent	11.1%	2
None	0.0%	0
Other (please specify)	11.1%	2
• Space		
• Competition		
Answered question		18
Skipped question		5

Source: Broadmeadows MAC Business Intentions Survey

Question 16: In the next 5 years the number of employees on-site will expand or contract?

Most of businesses surveyed (56%) anticipate the number of employees on-site will expand in the next 5 years, while a high share (39%) anticipate the number will stay about the same. Importantly, no businesses indicated they would be reducing employee numbers over the coming 5 years.

Figure 4.18: Number of employees on site in the next 5 years

Source: Broadmeadows MAC Business Intentions Survey

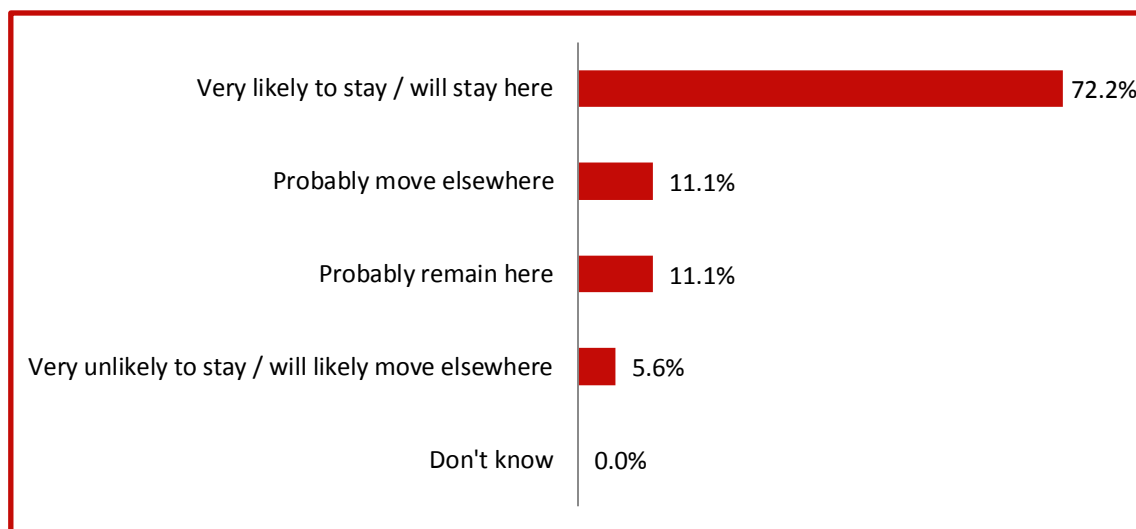
Table 4.16: Number of employees on site in the next 5 years

Answer Options	Response Share	Response Count
Expand	55.6%	10
Stay about the same	38.9%	7
Don't know	5.6%	1
Contract	0.0%	0
Answered question		18
Skipped question		5

Source: Broadmeadows MAC Business Intentions Survey

Question 17: How likely is your business to stay in its current location over the next 5 years?

A large majority (72%) of businesses surveyed indicated they are very likely to stay in their current location over the next 5 years, while a much smaller share (11%) are contemplating whether to remain on the site or move elsewhere. A very small share (6%) of businesses surveyed indicated they are very likely to move elsewhere.

Figure 4.19: Likelihood to stay in its current location over the next 5 years

Source: Broadmeadows MAC Business Intentions Survey

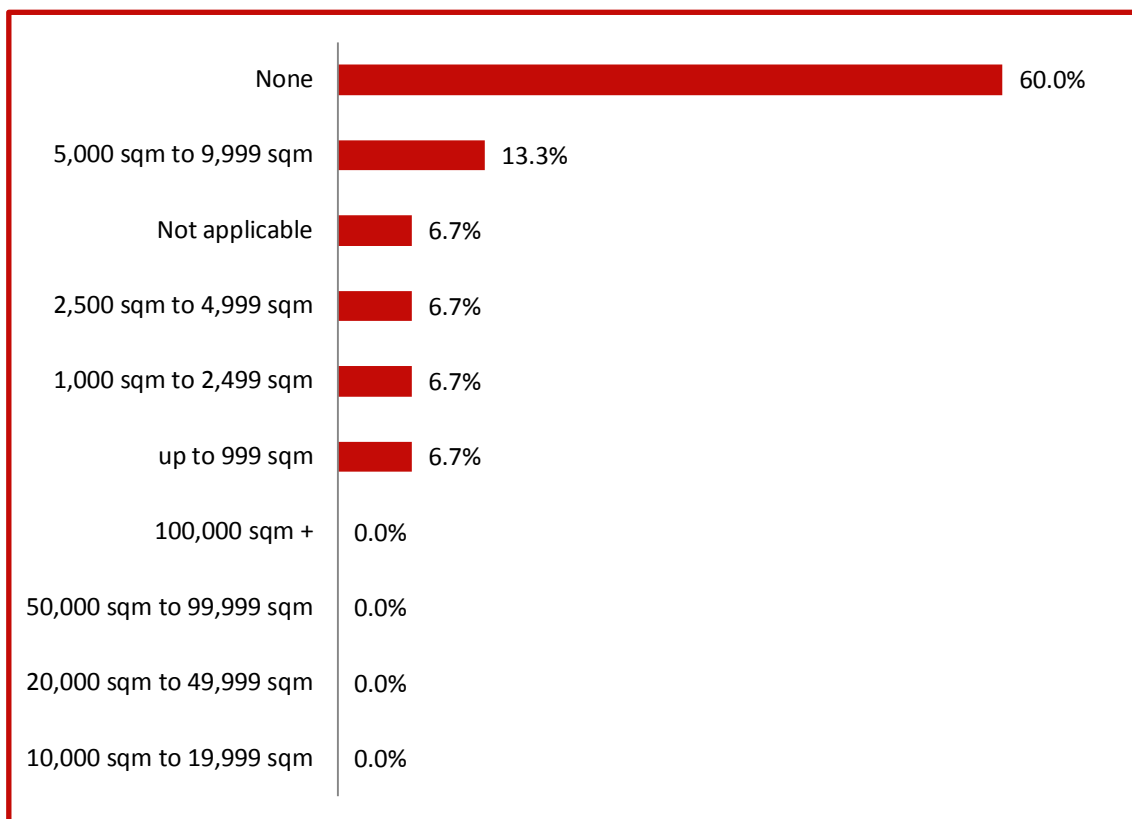
Table 4.17: Likelihood to stay in its current location over the next 5 years

Answer Options	Response Share	Response Count
Very likely to stay / will stay here	72.2%	13
Probably remain here	11.1%	2
Probably move elsewhere	11.1%	2
Very unlikely to stay / will likely move elsewhere	5.6%	1
Don't know	0.0%	0
Answered question		18
Skipped question		5

Source: Broadmeadows MAC Business Intentions Survey

Question 18: If your business is likely to stay in this location over the next 5 years, what additional land area will be required for expansion purposes?

The majority of respondent who indicated they are likely to stay in the current location over the coming 5 years will not require additional land for expansion purposes (60%). Other businesses generally require between 5,000m² to 9,999 m² of additional land (13%), or less land required (20%).

Figure 4.20: Additional land area required for expansion purposes

Source: Broadmeadows MAC Business Intentions Survey

Table 4.18: Additional land area required for expansion purposes

Answer Options	Response Share	Response Count
None	60.0%	9
5,000 sqm to 9,999 sqm	13.3%	2
up to 999 sqm	6.7%	1
1,000 sqm to 2,499 sqm	6.7%	1
2,500 sqm to 4,999 sqm	6.7%	1
Not applicable	6.7%	1
10,000 sqm to 19,999 sqm	0.0%	0
20,000 sqm to 49,999 sqm	0.0%	0
50,000 sqm to 99,999 sqm	0.0%	0
100,000 sqm +	0.0%	0
Answered question		15
Skipped question		8

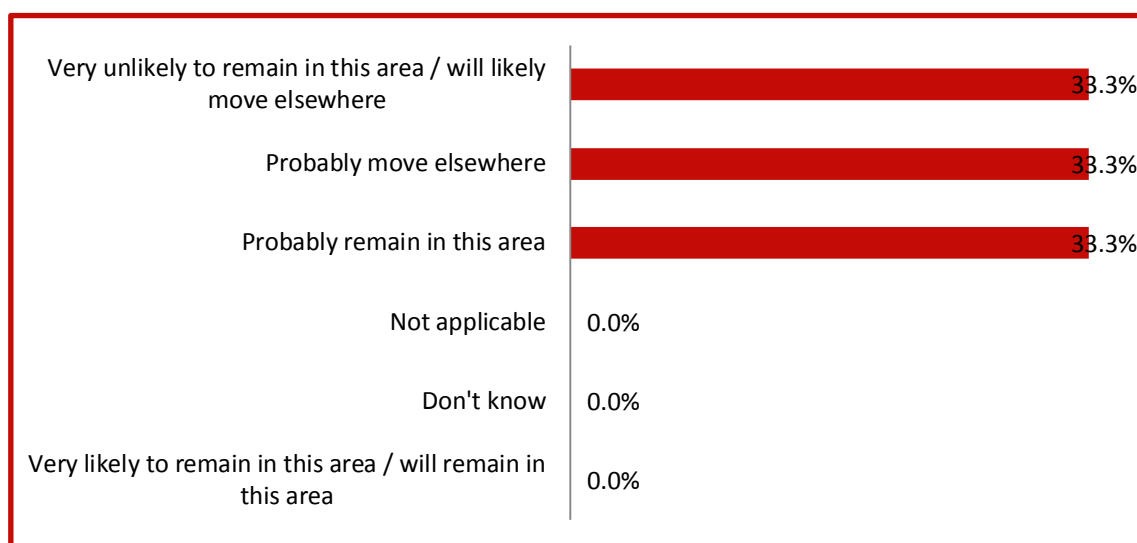
Source: Broadmeadows MAC Business Intentions Survey

4.5 Alternative Locations

Question 19: If your business was to move from its current location, how likely is the business to remain in the Broadmeadows Major Activity Centre?

The majority of businesses surveyed skipped this question, as they had previously indicated their business was unlikely to move. Of the three responses received, one business indicated they will “probably remain in this area”, another business indicated they will “probably move elsewhere”, and one business indicated they will “very likely move elsewhere”.

Figure 4.21: Likelihood of business to remain in the Broadmeadows Major Activity Centre



Source: Broadmeadows MAC Business Intentions Survey

Table 4.19: Likelihood of business to remain in the Broadmeadows Major Activity Centre

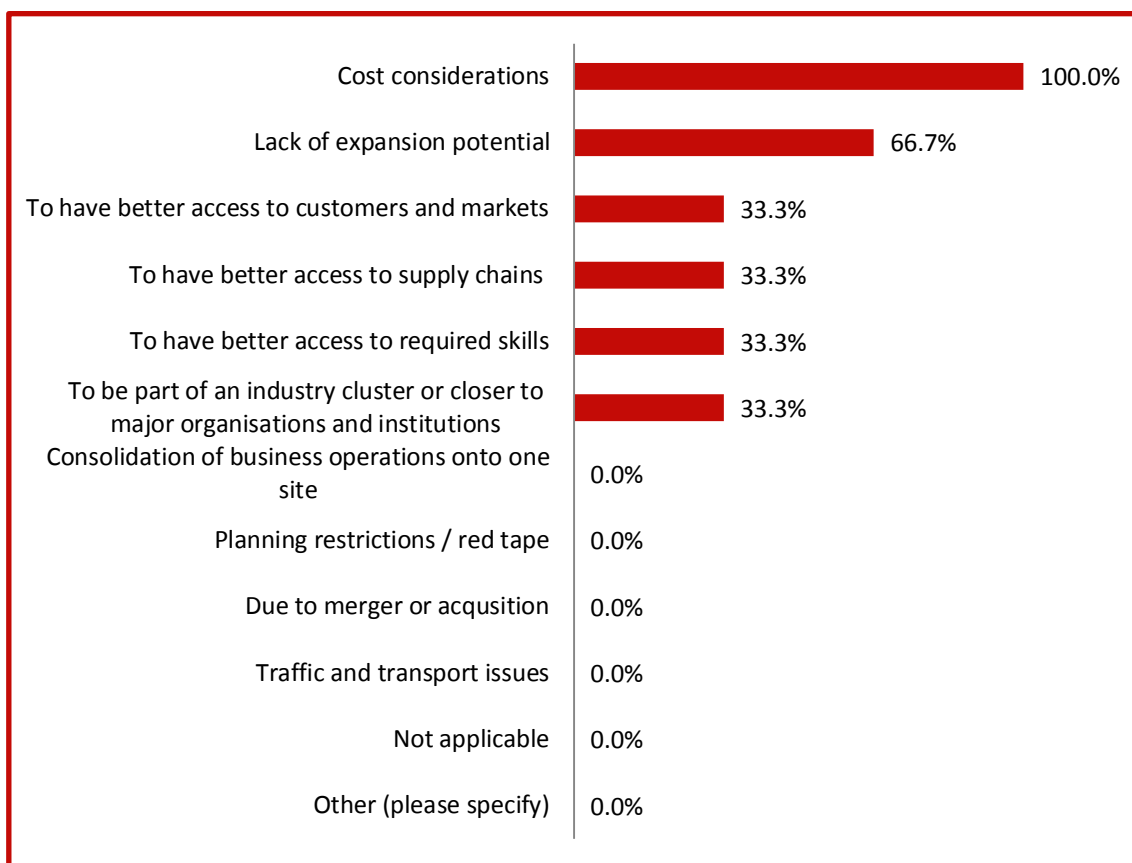
Answer Options	Response Share	Response Count
Probably remain in this area	33.3%	1
Probably move elsewhere	33.3%	1
Very unlikely to remain in this area / will likely move elsewhere	33.3%	1
Very likely to remain in this area / will remain in this area	0.0%	0
Don't know	0.0%	0
Not applicable	0.0%	0
Answered question		3
Skipped question		20

Source: Broadmeadows MAC Business Intentions Survey

Question 20: What would be your main reasons for moving out of the Broadmeadows Major Activity Centre?

The survey allowed respondents to select more than one answer. All businesses surveyed agreed that cost considerations would be the main reasons for moving out of the Broadmeadows Major Activity Centre (100%). Other reasons include a lack of expansion potential (67%), the need for better access to customers and markets (33%), better access to supply chains (33%), better access to required skills (33%), and to be part of an industry cluster (33%).

Figure 4.22: Reasons for moving out of the Broadmeadows Major Activity Centre (multi-response)



Source: Broadmeadows MAC Business Intentions Survey

Table 4.20: Reasons for moving out of the Broadmeadows Major Activity Centre (multi-response)

Answer Options	Response Share	Response Count
Cost considerations	100.0%	3
Lack of expansion potential	66.7%	2
To have better access to customers and markets	33.3%	1
To have better access to supply chains	33.3%	1
To have better access to required skills	33.3%	1
To be part of an industry cluster or closer to major organisations and institutions	33.3%	1
Consolidation of business operations onto one site	0.0%	0
Planning restrictions / red tape	0.0%	0
Due to merger or acquisition	0.0%	0
Traffic and transport issues	0.0%	0
Not applicable	0.0%	0
Other (please specify)	0.0%	0
Answered question		3
Skipped question		20

Source: Broadmeadows MAC Business Intentions Survey

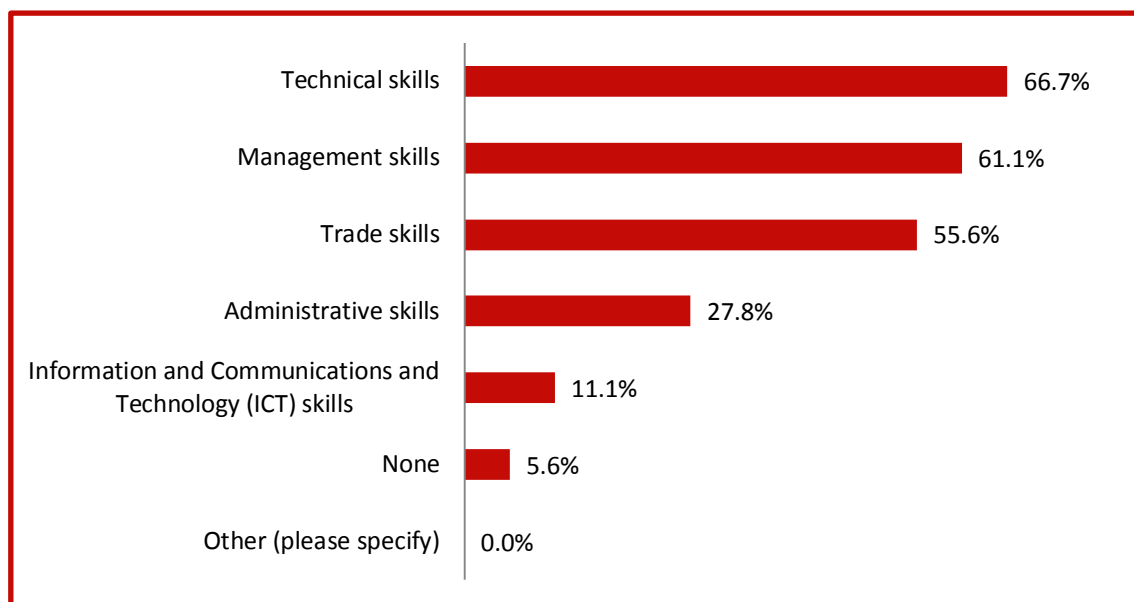
Question 21: What alternative locations would you seriously consider for your business?

This survey question received no responses.

4.6 Skills

Question 22: Thinking about your workforce over the next 5 years, what particular skill shortages may affect your business and require up-skilling?

The survey allowed respondents to select more than one answer. The main skills requirements over the next 5 years are technical skills (67%), management skills (61%), and trade skills (56%).

Figure 4.23: Skill shortages that may require up-skilling over the next 5 years (multi-response)

Source: Broadmeadows MAC Business Intentions Survey

Table 4.21: Skill shortages that may require upskilling over the next 5 years (multi-response)

Answer Options	Response Share	Response Count
Technical skills	66.7%	12
Management skills	61.1%	11
Trade skills	55.6%	10
Administrative skills	27.8%	5
Information and Communications and Technology (ICT) skills	11.1%	2
None	5.6%	1
Other (please specify)	0.0%	0
Answered question		18
Skipped question		5

Source: Broadmeadows MAC Business Intentions Survey

4.7 Impact of Infrastructure/Investment Initiatives

Question 23: To what extent would improved road infrastructure support your business and encourage you to stay in the precinct?

One-half of businesses (50%) surveyed indicated that improved road infrastructure would greatly increase their intention to stay, while others indicated it would moderately increase their intention to stay (28%), or have no impact on their intention to stay (22%).

Table 4.22: Impact of improved road infrastructure on business and intention to stay

	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	9	5	4	1.72	18
Per cent	50.0	27.8%	22.2%		
Answered question					18
Skipped question					5

Source: Broadmeadows MAC Business Intentions Survey

Question 24: To what extent would improved public transport infrastructure support your business and encourage you to stay in the precinct?

Forty four per cent (44%) of businesses surveyed indicated that improved public transport infrastructure would have no impact on their intention to stay, while 28% of businesses surveyed indicated it would greatly increase their intention to stay.

Table 4.23: Impact of improved public transport infrastructure on business and intention to stay

	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	5	5	8	2.17	18
Per cent	27.8%	27.8%	44.4%		
Answered question					18
Skipped question					5

Source: Broadmeadows MAC Business Intentions Survey

Question 25: To what extent would improved broadband (e.g. access to the National Broadband Network) support your business and encourage you to stay in the precinct?

One-half of businesses surveyed (50%) indicated that improved broadband would greatly increase their intention to stay, while a smaller share indicated it would moderately increase their intention to stay (28%), with others indicating it would have no impact on their intention to stay (22%).

Table 4.24: Impact of improved broadband on business and intention to stay

	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	9	5	4	1.72	18
Per cent	50.0%	29.0%	22.2%		
Answered question					18
Skipped question					5

Source: Broadmeadows MAC Business Intentions Survey

Question 26: To what extent would improved utilities infrastructure (e.g. gas, electricity, water, sewerage) support your business and encourage you to stay in the precinct?

Over one-half (56%) of businesses surveyed indicated that improved utilities infrastructure would greatly increase their intentions to stay, while a smaller share (28%) indicated it would moderately increase their intention to stay, with a further small share (17%) indicating it would have no impact on their decision to stay.

Table 4.25: Impact of improved utilities infrastructure on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	10	5	3	1.61	18
Per cent	55.5%	27.8%	16.7%		
Answered question					18
Skipped question					5

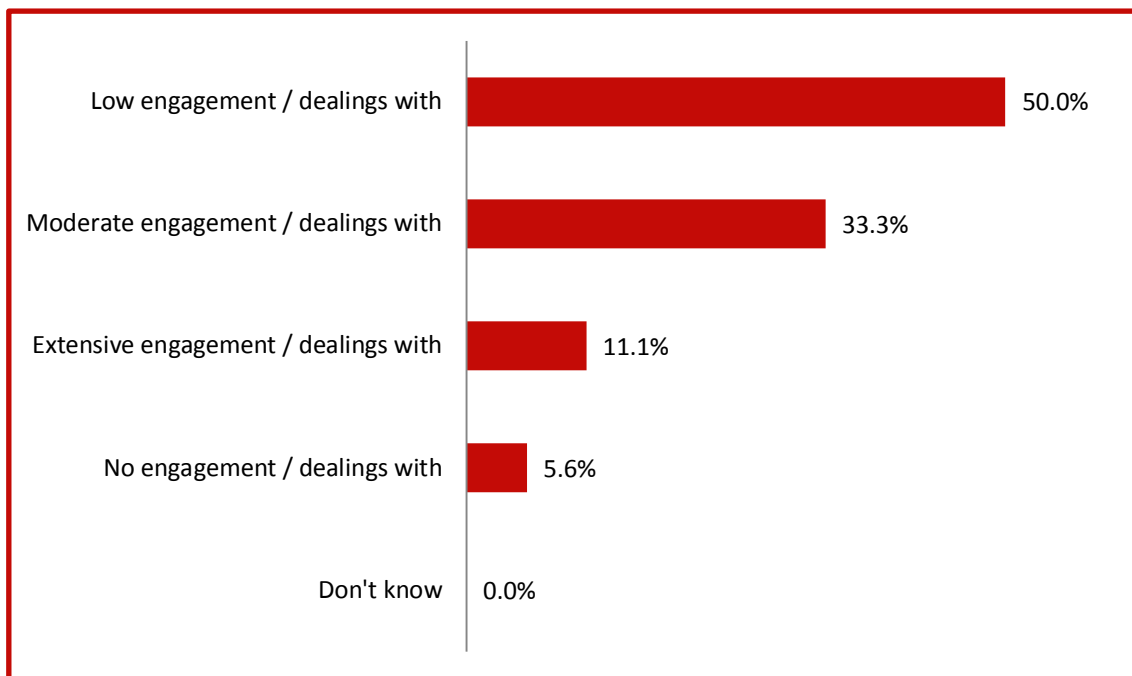
Source: Broadmeadows MAC Business Intentions Survey

4.8 Building Relationships

Question 27: How would you rate the extent of relationships your business has with other businesses, services or institutions in the precinct?

One-half (50%) of businesses surveyed indicated a low engagement with other businesses in the precinct, one-third (33%) indicated a moderate level of engagement, and a small share (11%) indicated an extensive level of engagement.

Figure 4.24: Extent of relationships the business has with other businesses, services or institutions in the precinct.



Source: Broadmeadows MAC Business Intentions Survey

Table 4.26: Extent of relationships the business has with other businesses, services or institutions in the precinct.

Answer Options	Response Share	Response Count
Low engagement / dealings with	50.0%	9
Moderate engagement / dealings with	33.3%	6
Extensive engagement / dealings with	11.1%	2
No engagement / dealings with	5.6%	1
Don't know	0.0%	0
Answered question		18
Skipped question		5

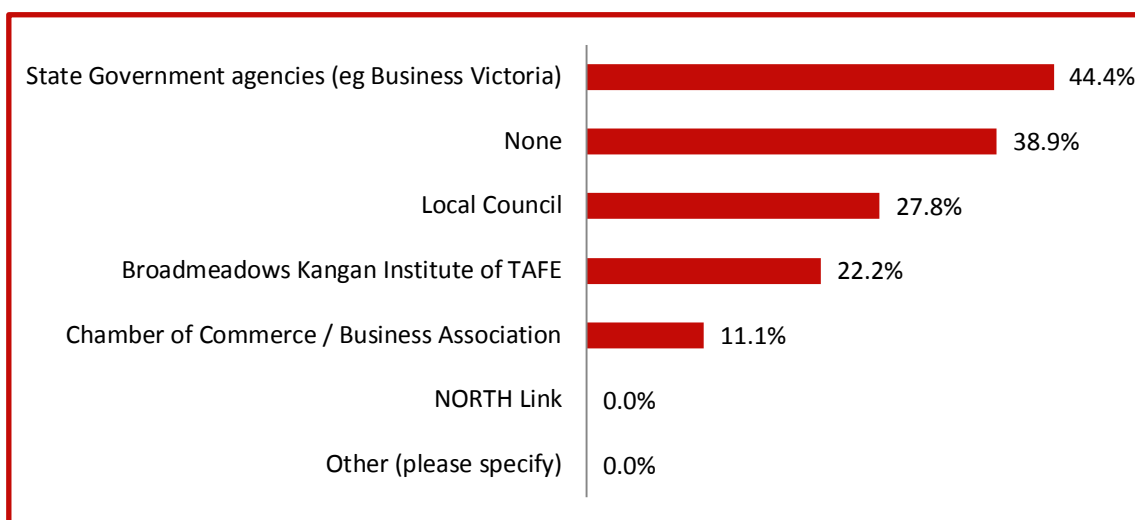
Source: Broadmeadows MAC Business Intentions Survey

Question 28: Which are the main businesses or institutions in the precinct that your business currently engages or collaborates with?

The survey allowed respondents to select more than one answer. The businesses or institutions that businesses currently engage or collaborate with most frequently are the State Government agencies (44%), local councils (28%), and Broadmeadows Kangan Institute of TAFE

(22%). A significant share of businesses surveyed (39%) indicated they do not collaborate or engage with any other business or institution in the precinct.

Figure 4.25: Main businesses or institutions that the business is currently engaging or collaborating with.



Source: Broadmeadows MAC Business Intentions Survey

Table 4.27: Main businesses or institutions that the business is currently engaging or collaborating with (multi-response)

Answer Options	Response Share	Response Count
State Government agencies (e.g. Business Victoria)	44.4%	8
None	38.9%	7
Local Council	27.8%	5
Broadmeadows Kangan Institute of TAFE	22.2%	4
Chamber of Commerce / Business Association	11.1%	2
NORTH Link	0.0%	0
Other (please specify)	0.0%	0
Answered question		18
Skipped question		5

Source: Broadmeadows MAC Business Intentions Survey

Question 29: What else, if anything, would make the precinct a more attractive location for your business in the future?

The challenges that businesses would like to overcome relate to the cost of council charges, circulation of research and development outcomes, internet speeds and parking.

Table 4.28: Challenges that businesses would like to overcome

Response Number	Response Text
1	Parking, lighting security
2	Better ADSL speed - improve or replace copper network
3	Circulation of R&D outcomes from materials technology development institutions
4	Reduce council charges

Source: Broadmeadows MAC Business Intentions Survey

4.9 Conclusions

1. Businesses chose to locate in the Broadmeadows MAC principally due to land availability (35%), cost considerations (22%) and access to markets and supply chains (17%).
2. Limitations or drawbacks of the location are lack of accessibility to suppliers (39%), lack of accessibility to clients (39%), and poor accessibility to the precinct by road (35%).
3. A majority of businesses surveyed indicate the precinct has a poor reputation (53%), while a lack safety and security is regarded by 43% of respondents as the main limitation of doing business in Broadmeadows MAC.
4. Approximately one-half of businesses surveyed (46%) in the Broadmeadows MAC are currently exporting overseas, and an additional one-quarter (23%) of businesses are interested in exporting. Businesses not currently exporting note that the main barrier is related to the high level of competition internationally.
5. A lack of access to capital (56%) is the main barrier to expansion for most businesses located in the Broadmeadows MAC.
6. The majority of businesses (72%) indicate they are very likely / will remain in the Broadmeadows MAC in the coming 5 years.
7. Approximately half the businesses surveyed in the Broadmeadows MAC would be greatly enticed to stay in the precinct through improved utilities (56%), broadband (50%) and road infrastructure (50%).
8. Technical skills (67%), management skills (61%) and trade skills (56%) are the main upskilling requirements identified over the next 5 years for Broadmeadows MAC businesses.
9. The majority of Broadmeadows MAC businesses have low to moderate levels of engagement (83% combined) with other businesses, services or institutions. Businesses chose to locate in Broadmeadows MAC principally because of the land availability, ease of access to customers and markets, and low cost considerations.

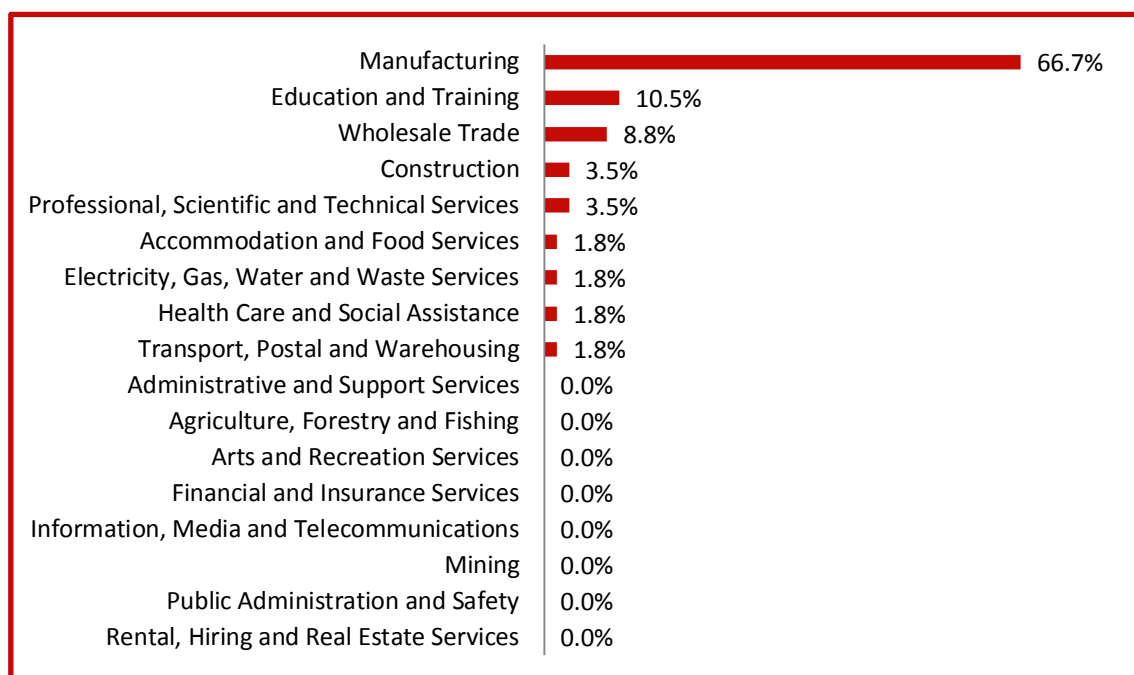
5 DANDENONG SOUTH NEC – SURVEY FINDINGS

5.1 Introduction

The online business intentions survey was distributed to 730 businesses in the Dandenong NEC, with a total of 67 responses received. This represents a response rate of approximately 9%.

Approximately two-thirds of the business respondents were associated with the manufacturing industry (67%), followed by education and training organisations (11%), wholesale trade businesses (9%), construction businesses (4%), professional, scientific and technical services (4%), accommodation and food services (2%), electricity, gas, water and waste services (2%), health care and social assistance organisations (2%), and transport, postal and warehousing businesses (2%).

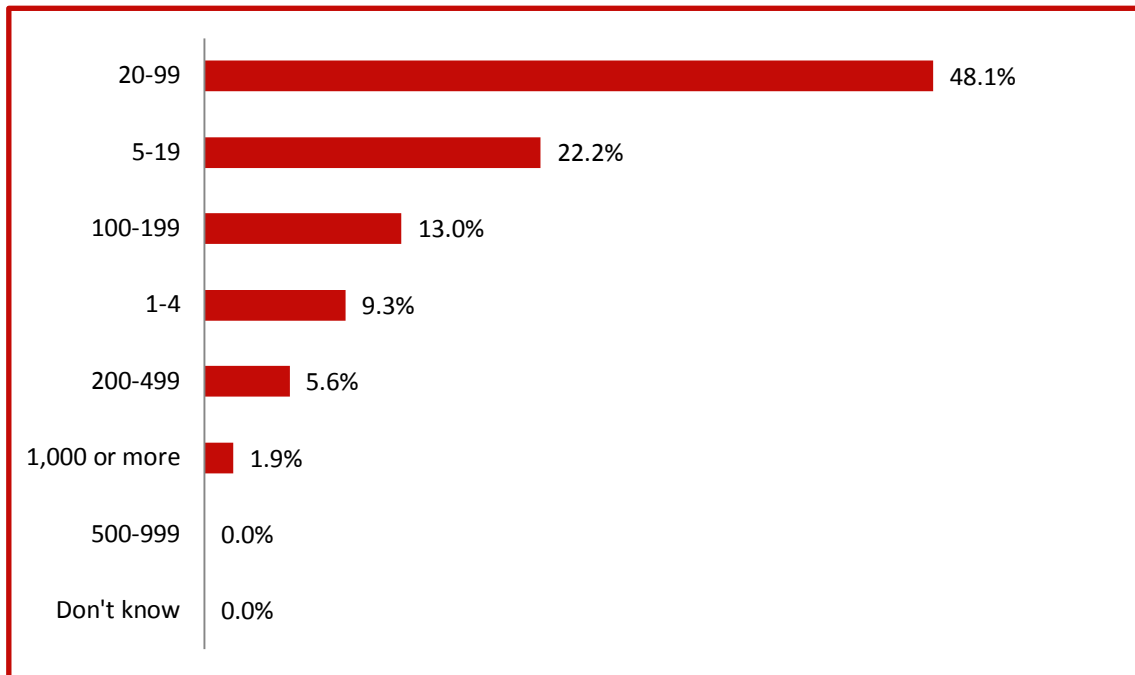
Figure 5.1: Dandenong South NEC – Business Profile of Survey Respondents



Source: Dandenong South NEC Business Intentions Survey

The majority of respondents (70%) were small to medium-sized businesses with 5-99 on-site employees. A further 13% of respondents were large businesses (100-199 on-site employees), 9% were micro-businesses (1-4 on-site employees) and 8% were major businesses (200 on-site employees).

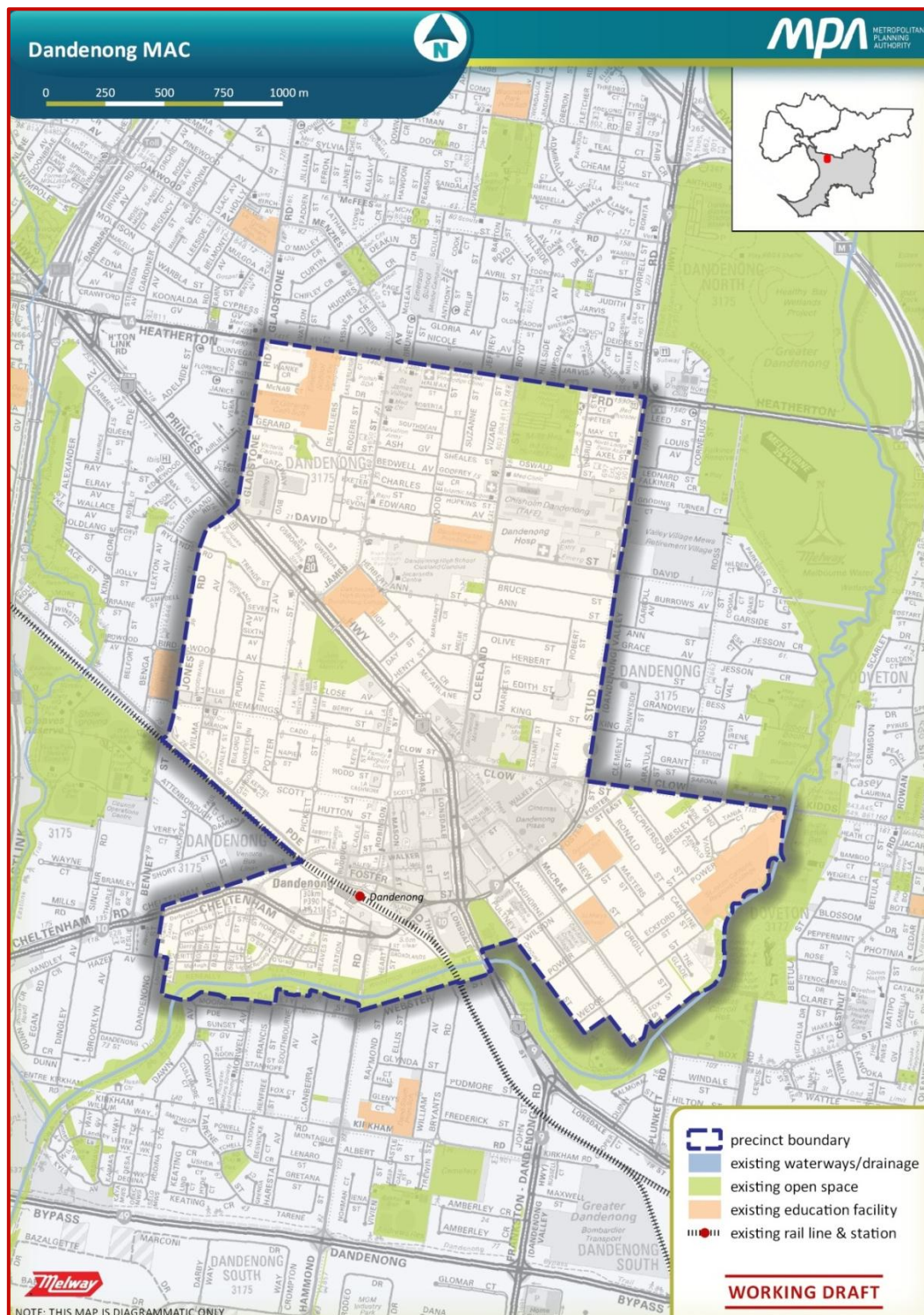
Figure 5.2: Dandenong South NEC – Business Size of Survey Respondents



Source: Dandenong South NEC Business Intentions Survey

Figure 5.3 outlines the boundaries of the Dandenong South NEC study area, while Sections 5.2 to 5.8 provide a summary of survey results.

Figure 5.3: Dandenong South National Employment Cluster – Precinct Location



Source: Metropolitan Planning Authority

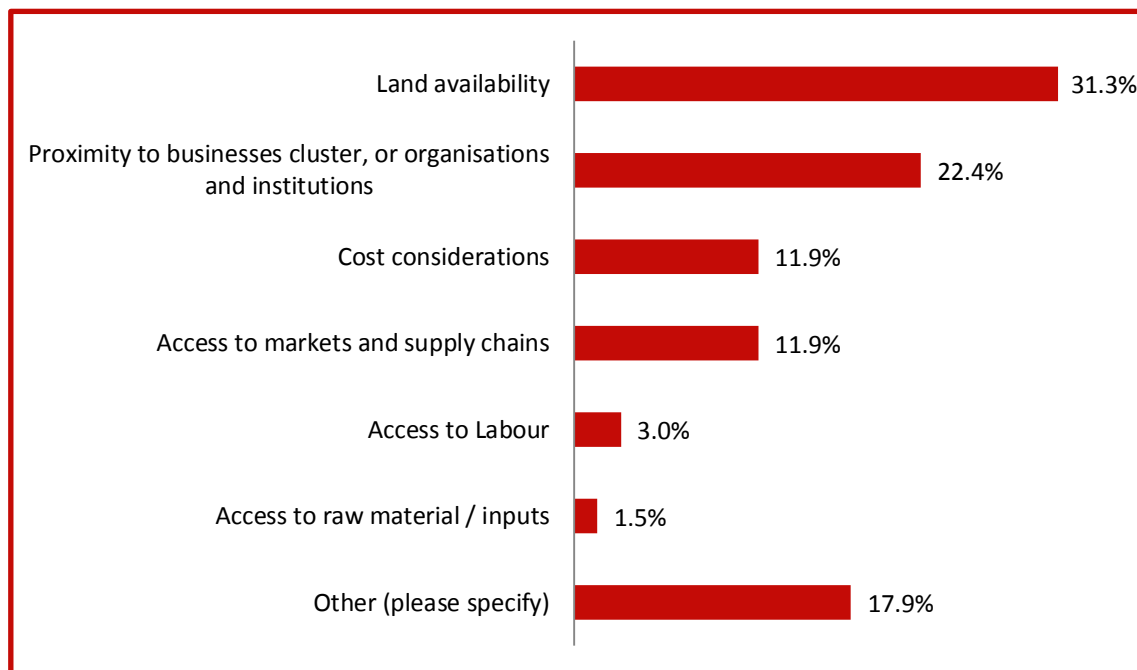
5.2 Choosing the Best Location

Question 1: What was the primary reason for your business moving to its current location?

The online survey explored reasons as to why businesses chose to locate in Dandenong South NEC. The most frequent responses are as follows:

Approximately one-third (31%) of businesses surveyed were influenced by the land available, 22% by proximity to business cluster or organisations and institutions, 12% by cost considerations, and 12% by the location's access to markets and supply chains.

Figure 5.4: Primary reason for businesses to move to its current location



Source: Dandenong South NEC Business Intentions Survey

Table 5.1: Primary reason for businesses to move to its current location

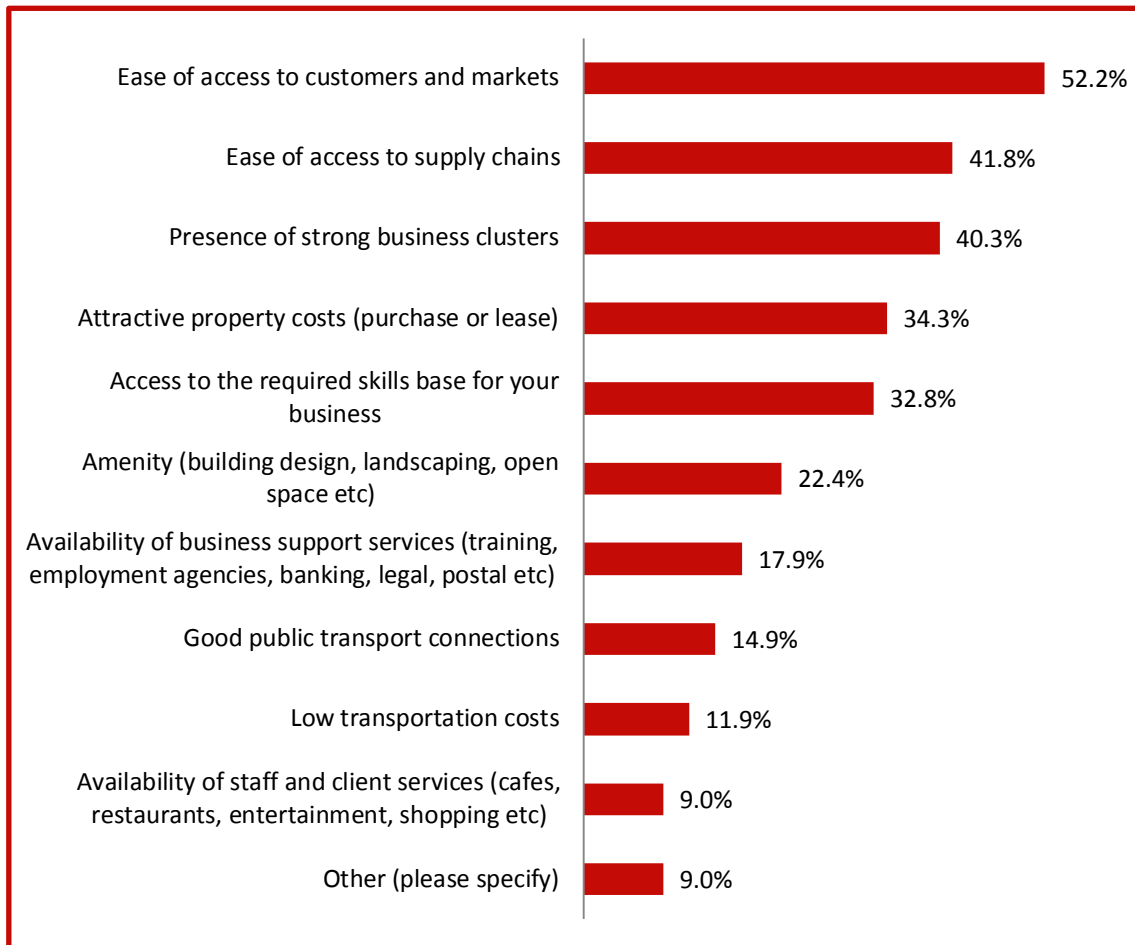
Answer Options	Response Share	Response Count
Land availability	31.3%	21
Cost considerations	11.9%	8
Access to markets and supply chains	11.9%	8
Access to raw material / inputs	1.5%	1
Access to Labour	3.0%	2
Proximity to businesses cluster, or organisations and institutions	22.4%	15
Other (please specify)		
<ul style="list-style-type: none"> • Needed a larger factory. Also freeway- road network provides good access for transportation • Local Berwick residence • Rail line access and major contracts in 1955 • Access for our customers size and use of property • Proximity to existing business • Education • Close to home • Existing business • Historic - we have been here for 110 years • Access to Eastlink freeway network (trucks to/from; staff travel) • Purchased an existing business • Purchased business 	17.9%	12
Answered question		67
Skipped question		0

Source: Dandenong South NEC Business Intentions Survey

Question 2: What are the key benefits or strengths of the current location of your premises?

Businesses surveyed indicated the key benefits or strengths of Dandenong South NEC relate to the location's ease of access to customers and markets (52%), ease of access to supply chains (42%), and presence of strong business clusters (40%).

Figure 5.5: Key benefits or strength of the current location (multi-response)



Source: Dandenong South NEC Business Intentions Survey

Table 5.2: Key benefits or strength of the current location (multi-response)

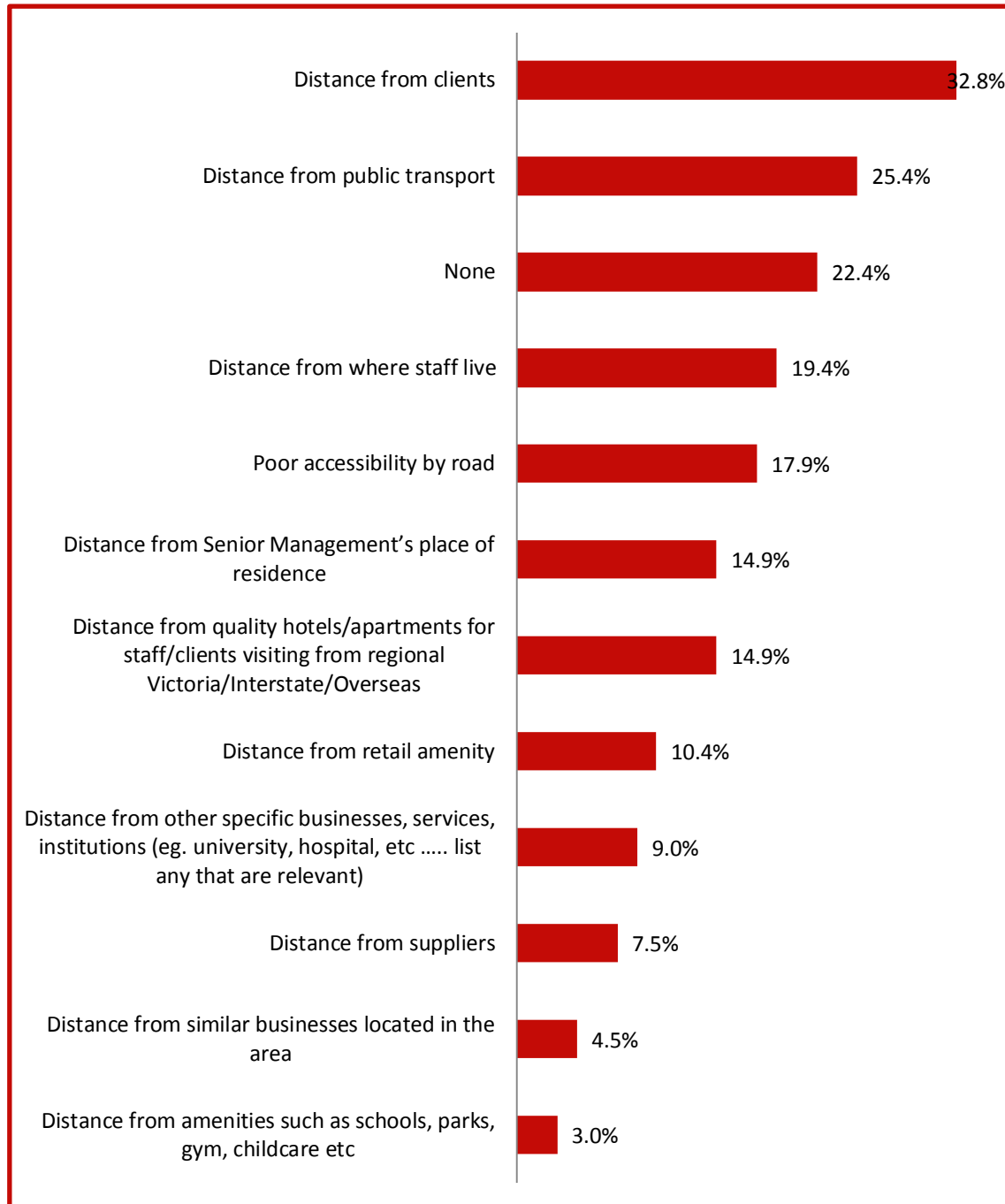
Answer Options	Response Share	Response Count
Attractive property costs (purchase or lease)	34.3%	23
Ease of access to customers and markets	52.2%	35
Ease of access to supply chains	41.8%	28
Availability of business support services (training, employment agencies, banking, legal, etc)	17.9%	12
Availability of staff and client services (cafes, restaurants, entertainment, shopping, etc.)	9.0%	6
Presence of strong business clusters	40.3%	27
Access to the required skills base for your business	32.8%	22
Low transportation costs	11.9%	8
Amenity (building design, landscaping, open space etc.)	22.4%	15
Good public transport connections	14.9%	10
Other (please specify)		
<ul style="list-style-type: none"> There is nowhere else to choose from - we have been driven out of other suburbs None Close to business partners and networks, including state and commonwealth govt departments Good access to the Port of Melbourne Access to Eastlink freeway network (trucks to/from; staff travel) Cost of relocating is prohibitive. 	9.0%	6
Answered question		67
Skipped question		0

Source: Dandenong South NEC Business Intentions Survey

Question 3: What do you think are the main locational limitations or drawbacks of your current location?

Businesses surveyed indicated that the main limitations or drawbacks at Broadmeadows relate to the location's distance from clients (33%), from public transport (25%), and from where staff live (19%). However, 22% of businesses surveyed noted there were no limitations of the current location.

Figure 5.6: Main locational limitations or drawbacks of the current location (multi-response)



Source: Dandenong South NEC Business Intentions Survey

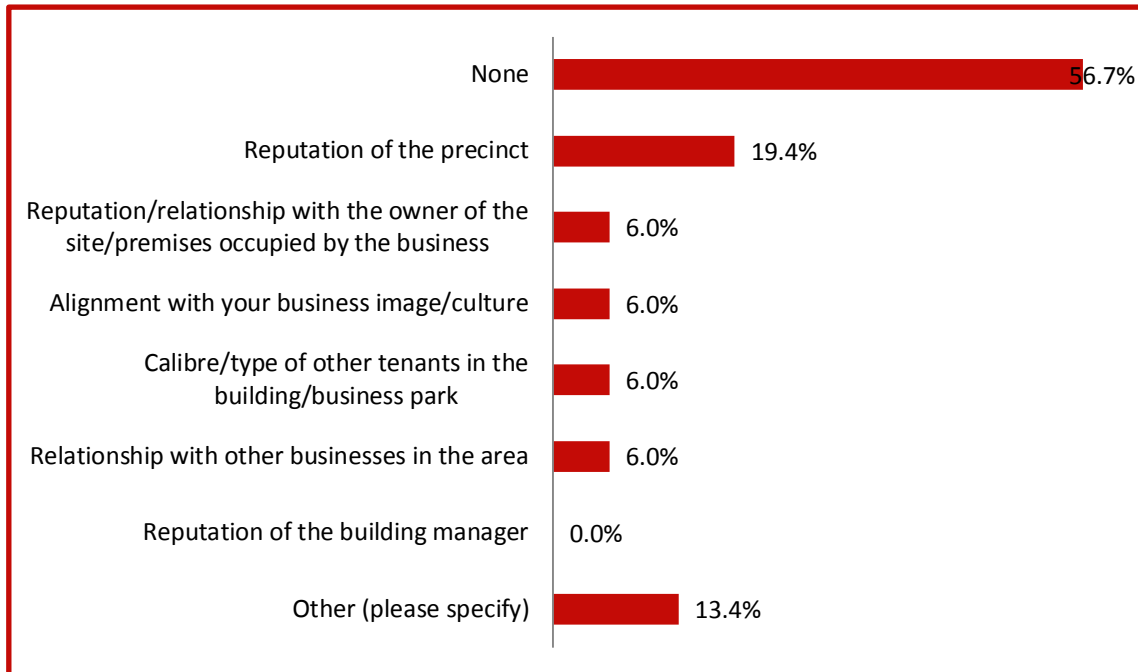
Table 5.3: Main locational limitations or drawbacks of the current location (multi-response)

Answer Options	Response Share	Response Count
Distance from clients	32.8%	22
Distance from suppliers	7.5%	5
Distance from similar businesses located in the area	4.5%	3
Distance from where staff live	19.4%	13
Distance from Senior Management's place of residence	14.9%	10
Distance from public transport	25.4%	17
Distance from other specific businesses, services, institutions (e.g.. university, hospital, etc. list any that are relevant)	9.0%	6
Poor accessibility by road	17.9%	12
Distance from retail amenity	10.4%	7
Distance from amenities such as schools, parks, gym, childcare etc.	3.0%	2
Distance from quality hotels/apartments for staff/clients visiting from regional Victoria/Interstate/Overseas	14.9%	10
None	22.4%	15
Other (please specify)		
<ul style="list-style-type: none"> Distance from food/cafe outlet + traffic congestion Away from transport hub other side Melbourne Internet connectivity - poor quality and access Car parking limitations and cost of leasing in CBD compared to similar areas It is a long way from where I live in the west Very bad internet Melbourne road congestion congested traffic conditions , increased dramatically in past 3 years no NBN access, congested roads, no pedestrian walkways, no community gardens 		9
Answered question		67
Skipped question		0
Source: Dandenong South NEC Business Intentions Survey		

Question 4: What do you think are the main image/reputation/relationship limitations or drawbacks of your current location?

Businesses surveyed indicated the main limitations relating to Dandenong NEC are the location's reputation (19%). However, the majority of businesses (57%) surveyed did not note any image/reputation/relationship limitations at Dandenong.

Figure 5.7: Main image/reputation/relationship limitations of the current location (multi-response)



Source: Dandenong South NEC Business Intentions Survey

Table 5.4: Main image/reputation/relationship limitations of the current location

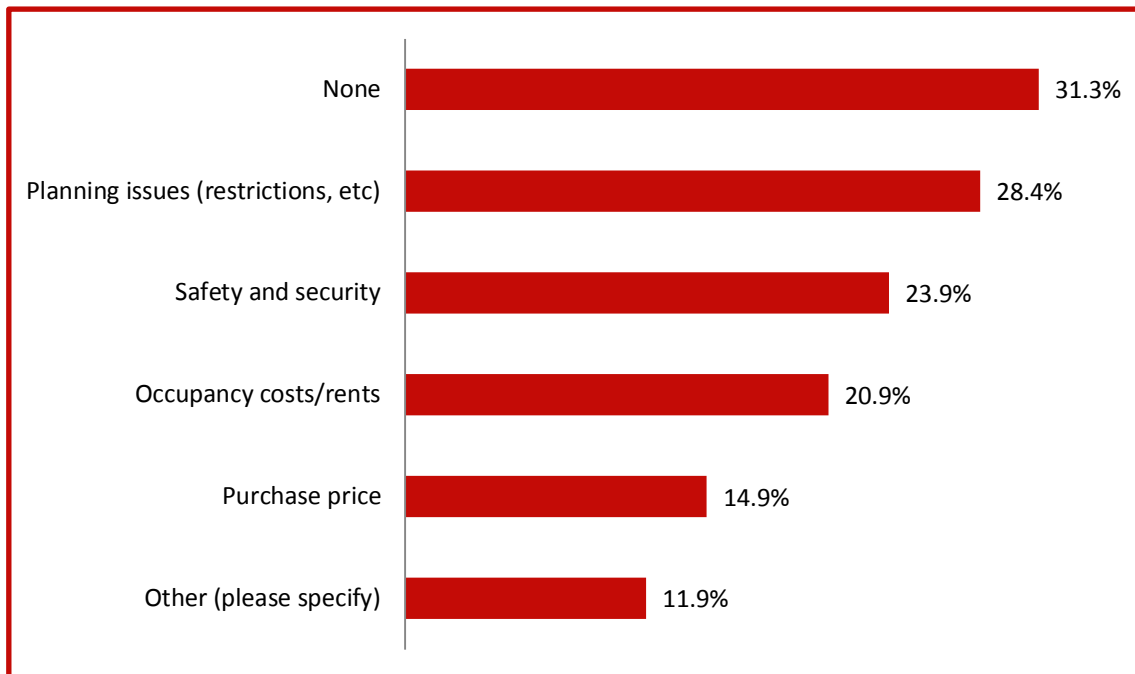
Answer Options	Response Share	Response Count
Reputation/relationship with the owner of the site/premises occupied by the business	6.0%	4
Reputation of the building manager	0.0%	0
Alignment with your business image/culture	6.0%	4
Calibre/type of other tenants in the building/business park	6.0%	4
Reputation of the precinct	19.4%	13
Relationship with other businesses in the area	6.0%	4
None	56.7%	38
Other (please specify)		
<ul style="list-style-type: none"> • Biggest drawback is both Victoria and Australia and governments are not friendly to manufacturing • Traffic congestion • Need more educational funding • Perception of safety of staff, particularly after hours • Unwillingness of other businesses to collaborate • We don't project the positive face of manufacturing • Council Building department relations • Security in Dandenong area • Perception of Dandenong 	13.4%	9
Answered question		67
Skipped question		0

Source: Dandenong South NEC Business Intentions Survey

Question 5: Are there any design/features of the site/building that are a drawback to your current location?

Business owners were asked to indicate any design features of the site or building that may be a limitation to their location. Most businesses indicated no such limitations existed (31%), while others noted planning issues (28%), safety and security (24%), and occupancy costs/rents (21%) as drawbacks to their current location.

Figure 5.8: Design/features of the site/building that are a drawback to the current location (multi-response)



Source: Dandenong South NEC Business Intentions Survey

Table 5.5: Design/features of the site/building that are a drawback to the current location (multi-response)

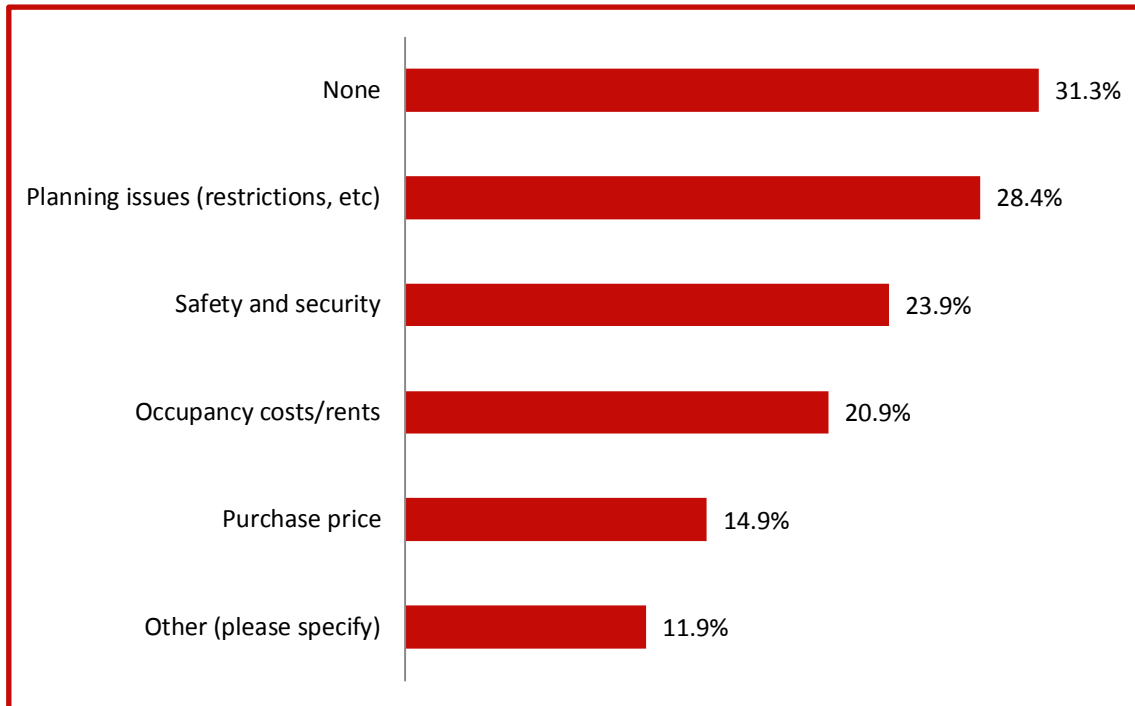
Answer Options	Response Share	Response Count
Size of site/premises	23.9%	16
Ability to have purpose-built premises	13.4%	9
Green rating/sustainability initiatives	4.5%	3
IT infrastructure	26.9%	18
Quality/style of fit-out	16.4%	11
Quality/style of building/accommodation	9.0%	6
Availability of parking for staff	17.9%	12
Availability of parking for clients/customers	10.4%	7
None	28.4%	19
Other (please specify)		
<ul style="list-style-type: none"> Dead end court attracts dead heads doing burn outs or illegal dumping No walking paths in our road, people must walk on the road. Our site is a work in progress More funding required for growth Wi-Fi/microwave dangers mean constant protection at great expense Access to public transport Lack of simple public transport options for staff No shops or cafes for lunches for staff Access onto south Gippsland hwy in peak times Too many cars parked on the road - dangerous for staff 	14.9%	10
Answered question		67
Skipped question		0

Source: Dandenong South NEC Business Intentions Survey

Question 6: What are the main costs/other limitations or drawbacks of your current location?

The main limitations of the current location for businesses are planning-related issues (28%), poor safety and security (24%), and high occupancy costs/rents (21%). However, 31% of businesses surveyed indicated they do not have any costs or other limitations at their current location.

Figure 5.9: Main costs/other limitations or drawbacks of the current location (multi-response)



Source: Dandenong South NEC Business Intentions Survey

Table 5.6: Main costs/other limitations or drawbacks of the current location (multi-response)

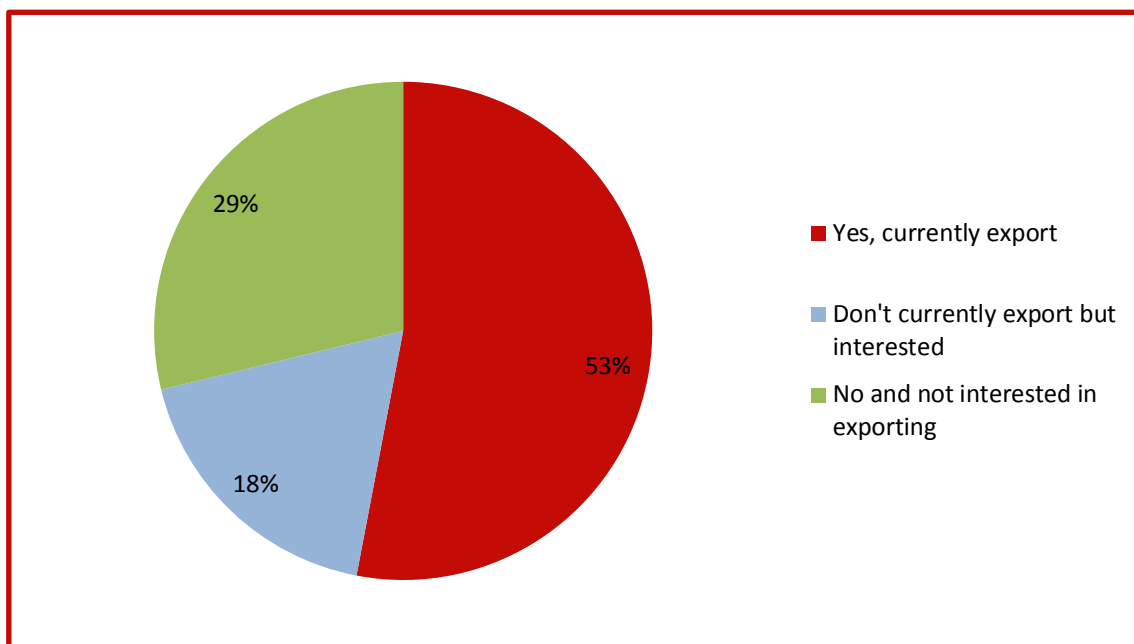
Answer Options	Response Share	Response Count
Occupancy costs/rents	20.9%	14
Purchase price	14.9%	10
Planning issues (restrictions, etc.)	28.4%	19
Safety and security	23.9%	16
None	31.3%	21
Other (please specify)		
<ul style="list-style-type: none"> Land taxes and council rates (we have more land than we need) Roads are rapidly clogging up and have not kept pace with growth in population and business activity Poor internet service Uncertainty around road and rail connections and projects like rail level crossing removal being approached with a single objective (close the crossing at all costs). Phone towers too close for health Streets used as hooning area for cars and not policed Council too slow in approving new building Uncertainty of Abbotts road closure for level crossing removal 	11.9%	8
Answered question		67
Skipped question		0

Source: Dandenong South NEC Business Intentions Survey

5.3 Exporting

Question 7: Does your business currently export goods or services overseas, or is your business interested in exporting?

Of the businesses surveyed, 53% currently export overseas, 18% are not currently exporting but are interested in exporting in the future, and 29% have no interest in exporting.

Figure 5.10: Businesses currently exporting goods and services overseas

Source: Dandenong South NEC Business Intentions Survey

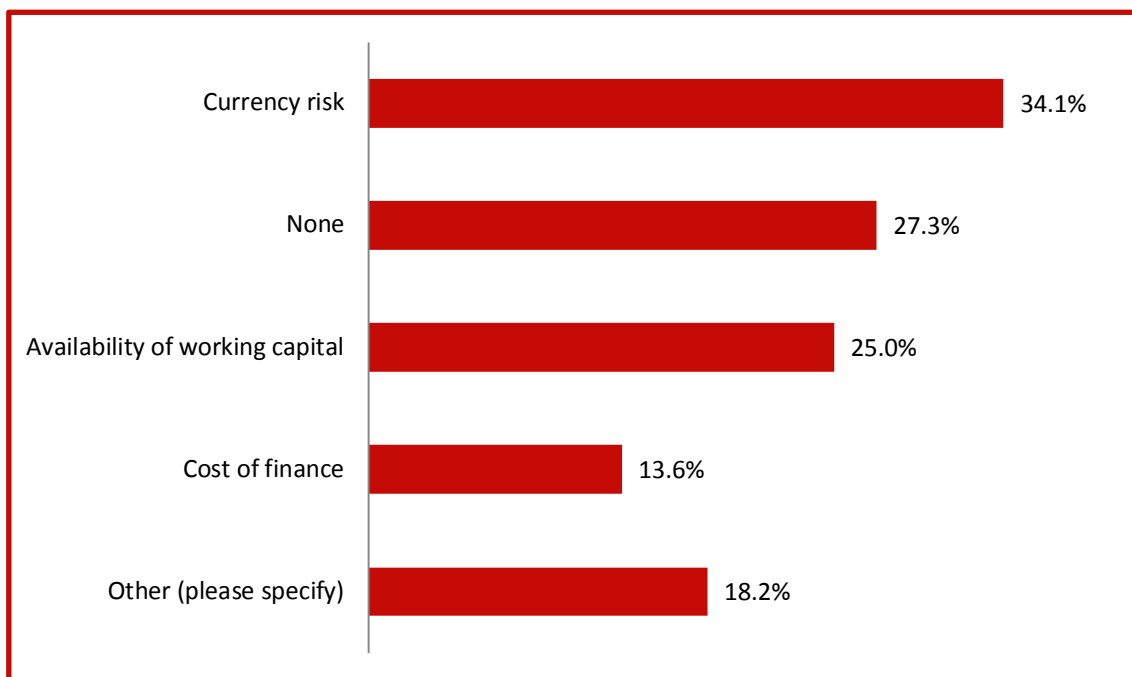
Table 5.7: Businesses currently exporting goods and services overseas

Answer Options	Response Share	Response Count
Yes, currently export	53.0%	35
Don't currently export but interested	18.2%	12
No and not interested in exporting	28.8%	19
Answered question		66
Skipped question		1

Source: Dandenong South NEC Business Intentions Survey

Question 8: What are the main finance-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. Respondents nominated currency risk (34%) and the availability of working capital (25%) as the main financial barriers to exporting. However, just over one-in-four (27%) indicated no financial-related barriers to exporting.

Figure 5.11: Main finance-related barriers to exporting (multi-response)

Source: Dandenong South NEC Business Intentions Survey

Table 5.8: Main finance-related barriers to exporting (multi-response)

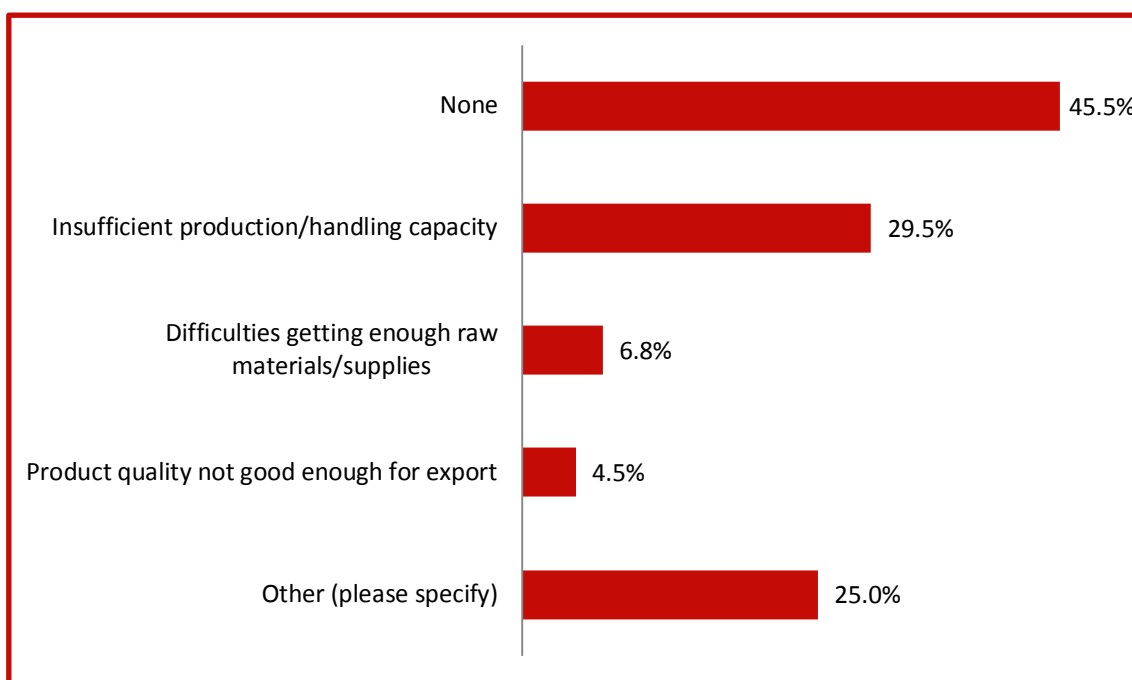
Answer Options	Response Share	Response Count
Availability of working capital	25.0%	11
Cost of finance	13.6%	6
Currency risk	34.1%	15
None	27.3%	12
Other (please specify)	18.2%	8
• Duties on our products when exported (on the reverse, competitors importing to Australia don't pay as much)		
• Who would lend to a manufacturing business?		
• Suitable products for other markets, low cost Japanese and Chinese finance and competitiveness		
• Price competitiveness		
• Getting new clients, exchange rates		
• Lack of government funding		
• Getting the right video conferencing technology		
• Not ready to pursue at this time		
Answered question		44
Skipped question		23

Source: Dandenong South NEC Business Intentions Survey

Question 9: What are the main production-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The main production-related barriers to exporting facing businesses are insufficient production/handling capacity (30%). However, 45% of businesses surveyed indicated they have not experienced any production-related barriers to exporting.

Figure 5.12: Production-related barriers to exporting (multi-response)



Source: Dandenong South NEC Business Intentions Survey

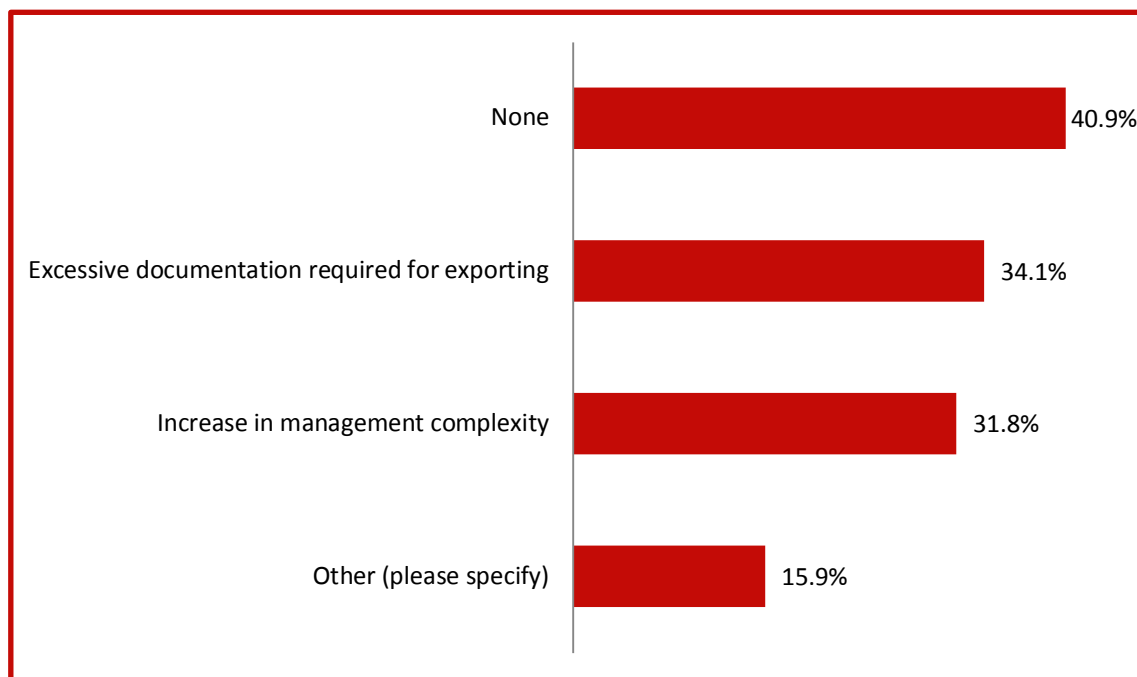
Table 5.9: Production-related barriers to exporting (multi-response)

Answer Options	Response Share	Response Count
Insufficient production/handling capacity	29.5%	13
Difficulties getting enough raw materials/supplies	6.8%	3
Product quality not good enough for export	4.5%	2
None	45.5%	20
Other (please specify)		
<ul style="list-style-type: none"> Competitiveness of local supplier base Resource performance and attitude We have good quality products which can be adapted to export but need a higher base quantity to be competitive Australian labour costs High cost of local material and labour Finding suitable teachers to work in time zones Geo Politics Finding other locals who want to work together and export Not ready to pursue at this time Industrial relations & cost of direct labour Inefficient supply chain (Transport companies) 	25.0%	11
Answered question		44
Skipped question		23

Source: Dandenong South NEC Business Intentions Survey

Question 10: What are the main logistics-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents noted the main logistics-related barriers to exporting are the excessive documentation required (34%), and the increase in management complexity (32%). However, four-in-ten (41%) of businesses surveyed indicated they have not experienced any logistics-related barriers to exporting.

Figure 5.13: Logistics-related barrier to exporting (multi-response)

Source: Dandenong South NEC Business Intentions Survey

Table 5.10: Logistics-related barrier to exporting (multi-response)

Answer Options	Response Share	Response Count
Excessive documentation required for exporting	34.1%	15
Increase in management complexity	31.8%	14
None	40.9%	18
Other (please specify)	15.9%	7
• Freight cost (our product is bulky)		
• Isolation from overseas cost of shipping goods		
• Delivery costs		
• Legalities in other countries and integrity of officials		
• Cost of freight / logistics		
• Cost of exporting		
• Not ready to pursue at this time		
Answered question		44
Skipped question		23

Source: Dandenong South NEC Business Intentions Survey

Question 9: What are the main production-related barriers to exporting that face your business?

Figure 5.14: Production-related barriers to exporting (multi-response)

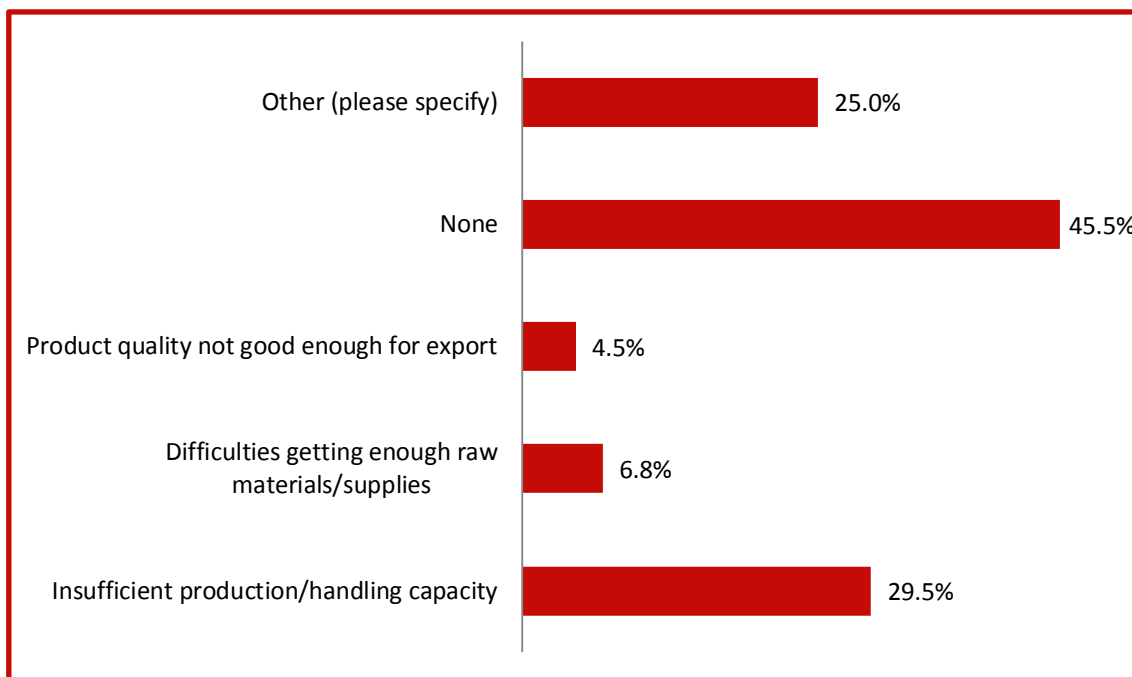


Table 5.11: Production-related barriers to exporting (multi-response)

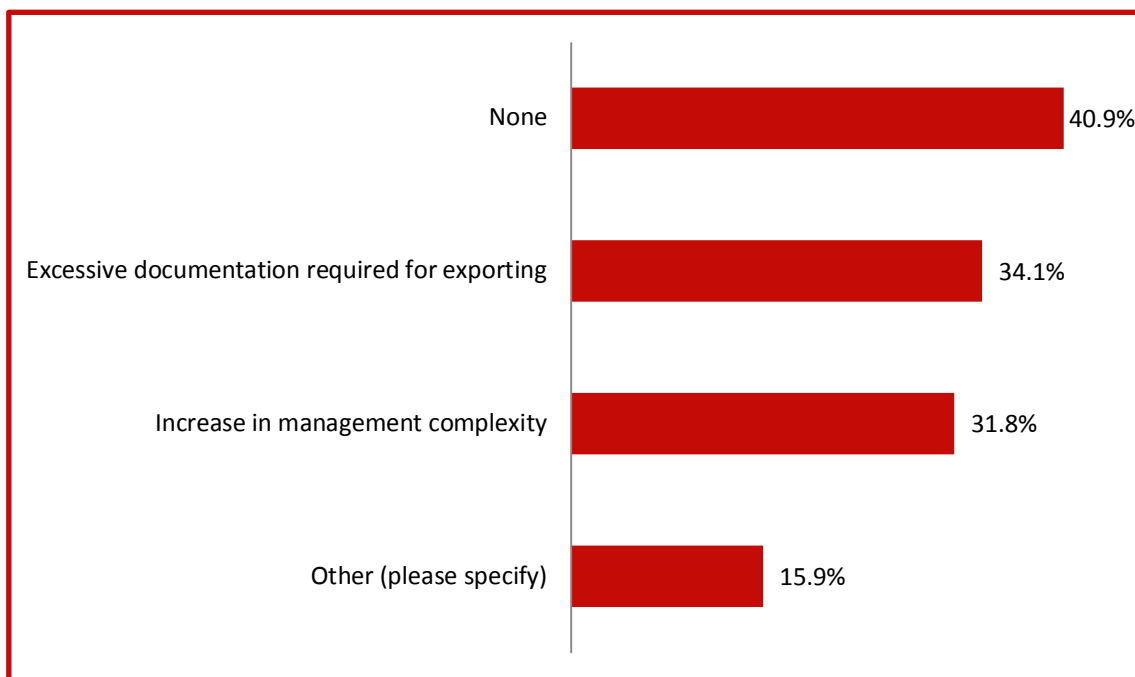
Answer Options	Response Share	Response Count
Insufficient production/handling capacity	29.5%	13
Difficulties getting enough raw materials/supplies	6.8%	3
Product quality not good enough for export	4.5%	2
None	45.5%	20
Other (please specify)	25.0%	11
Answered question		44
Skipped question		23

Source: Dandenong MAC Business Intentions Survey

Question 10: What are the main logistics-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents noted the main logistics-related barriers to exporting are the excessive documentation required (34%), and the increase in management complexity (32%). However, 41% of businesses surveyed indicated they have not experienced any logistics-related barriers to exporting.

Figure 5.15: Logistics-related barrier to exporting (multi-response)



Source: Dandenong South NEC Business Intentions Survey

Table 5.12: Logistics-related barrier to exporting (multi-response)

Answer Options	Response Share	Response Count
Excessive documentation required for exporting	34.1%	15
Increase in management complexity	31.8%	14
None	40.9%	18
Other (please specify)	15.9%	7
• Freight cost (our product is bulky)		
• Isolation from overseas, cost of shipping goods		
• Delivery costs		
• Legalities in other countries and integrity of officials		
• Cost of freight / logistics		
• Cost of exporting		
• Not ready to pursue at this time		
Answered question		44
Skipped question		23

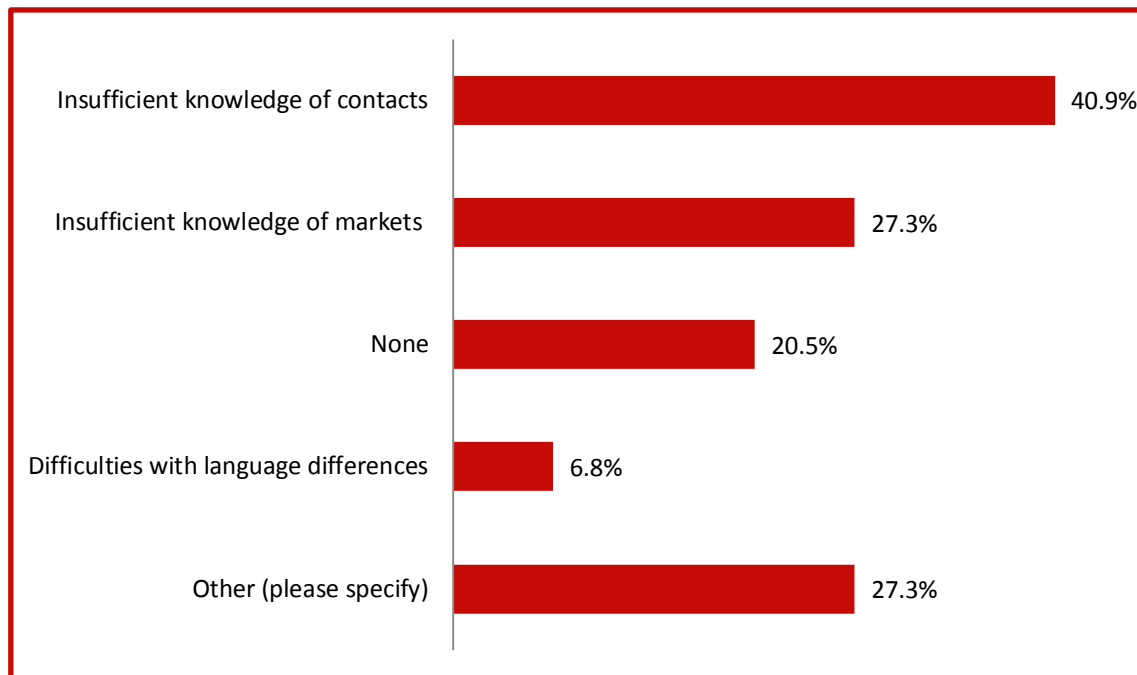
Source: Dandenong South NEC Business Intentions Survey

Question 11: What are the main market-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents noted that the main market-related barriers to exporting are an insufficient knowledge of

contacts (41%) and insufficient knowledge of markets (27%). However, 21% of businesses surveyed indicated they have not experienced any market-related barriers to exporting.

Figure 5.16: Market-related barriers to exporting (multi-response)



Source: Dandenong South NEC Business Intentions Survey

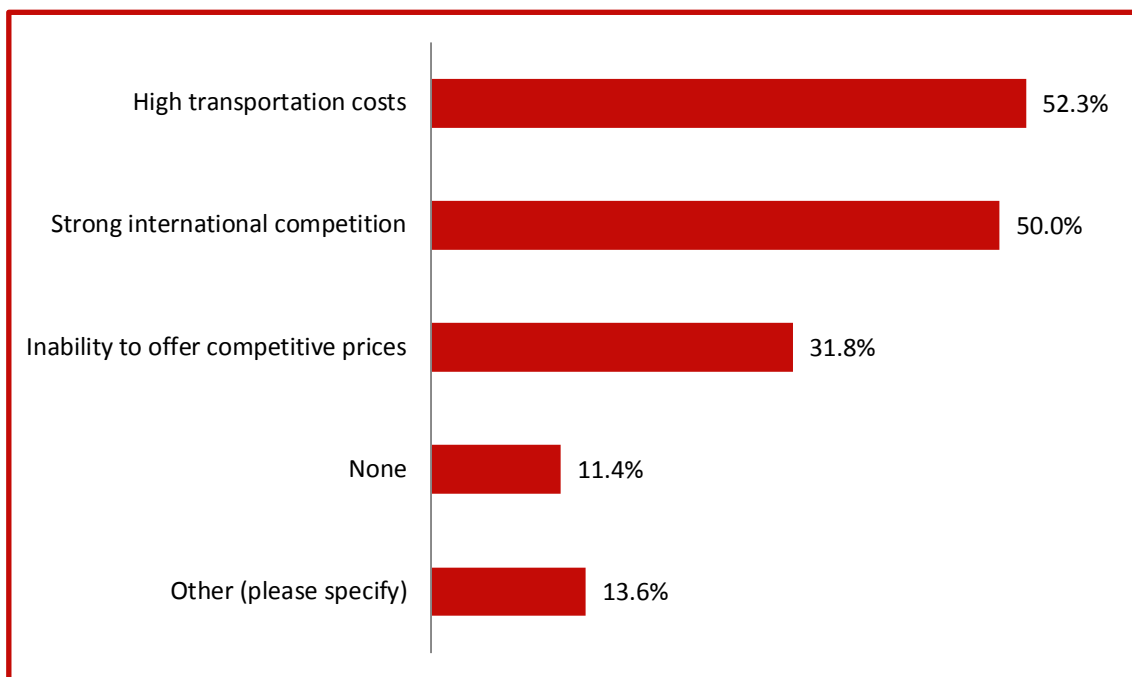
Table 5.13: Market-related barriers to exporting (multi-response)

Answer Options	Response Share	Response Count
Insufficient knowledge of markets	27.3%	12
Insufficient knowledge of contacts	40.9%	18
Difficulties with language differences	6.8%	3
None	20.5%	9
Other (please specify)		
<ul style="list-style-type: none"> • In Asia we have to compete against Chinese made goods. Do you know what this is like?? • Market opportunities • Regulations imposed by importing countries on defence articles • Many markets we could export to involve low cost finance and govt loans from Japan and China (on the basis of product from Japan or China) • Regulations- food • Government funding is the main problem • Funding marketing • Very low costs in export markets • Government health authority's excessive rules in every nation • Not ready to pursue at this time • Unnecessary claims be semi-Government departments • Lack of Federal/State initiative 	27.3%	12
Answered question		44
Skipped question		23

Source: Dandenong South NEC Business Intentions Survey

Question 12: What are the main competition-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents noted the main competition-related barriers to exporting are high transportation costs (52%), strong international competition (50%), and inability to offer competitive prices (32%).

Figure 5.17: Competition-related barriers to exporting (multi-response)

Source: Dandenong South NEC Business Intentions Survey

Table 5.14: Competition-related barriers to exporting (multi-response)

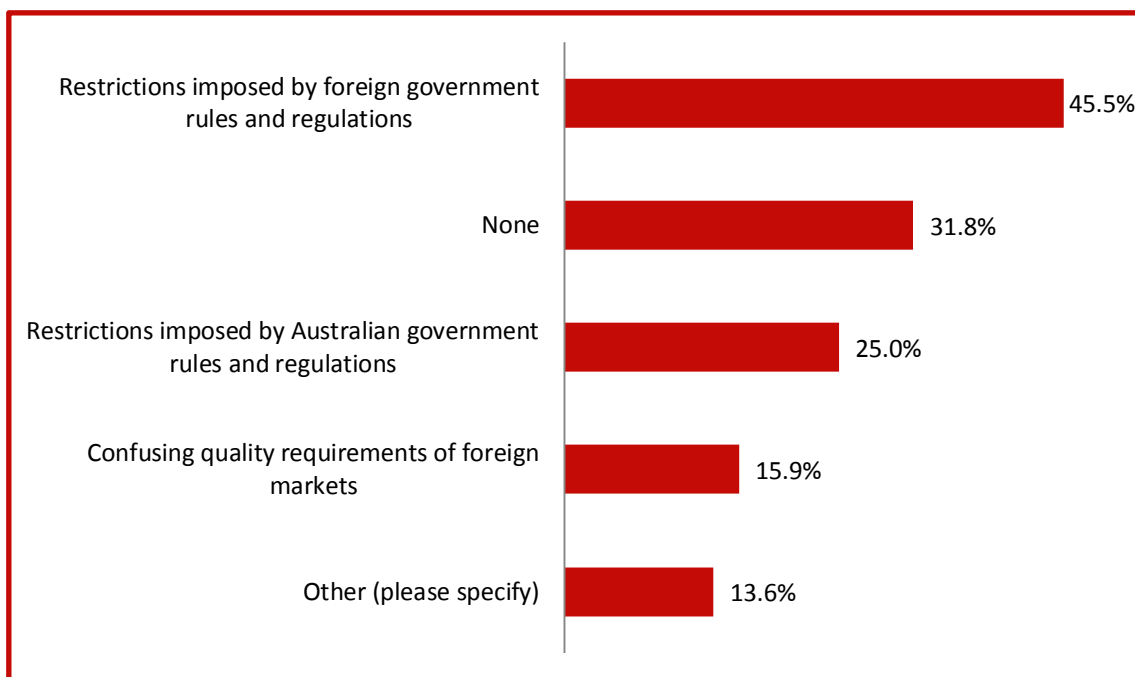
Answer Options	Response Share	Response Count
Strong international competition	50.0%	22
Inability to offer competitive prices	31.8%	14
High transportation costs	52.3%	23
None	11.4%	5
Other (please specify)	13.6%	6
• Duties on our products when exported (on the reverse, competitors importing to Australia don't pay as much)		
• High labour costs		
• Needs a big local base order to drive efficiency and bring cost down		
• Regulations- food		
• government funding		
• Not ready to pursue at this time		
Answered question		44
Skipped question		23

Source: Dandenong South NEC Business Intentions Survey

Question 13: What are the main regulatory impediments to exporting that face your business?

The survey allowed respondents to select more than one answer. Almost one-half of all respondents noted the main regulatory impediments to exporting are restrictions imposed by Australian government rules and regulations (45%), while 25% of respondents identified restrictions imposed by foreign government rules and regulations as an impediment. However, 32% of businesses surveyed indicated they have not experienced any market-related barriers to exporting.

Figure 5.18: Regulatory impediments to exporting (multi-response)



Source: Dandenong South NEC Business Intentions Survey

Table 5.15: Regulatory impediments to exporting (multi-response)

Answer Options	Response Share	Response Count
Restrictions imposed by foreign government rules and regulations	45.5%	20
Confusing quality requirements of foreign markets	15.9%	7
Restrictions imposed by Australian government rules and regulations	25.0%	11
None	31.8%	14
Other (please specify)		
<ul style="list-style-type: none"> Duties on our products when exported (on the reverse, competitors importing to Australia don't pay as much) I believe we open our markets generously, but our competitors keep theirs tightly held US Military have Berry Agreement insisting on US made for US military Regulations- food Artificially high costs in labour and overhead imposed by government Not ready to pursue at this time 	13.6%	6
Answered question		44
Skipped question		23
Source: Dandenong South NEC Business Intentions Survey		

Question 14: Are there any other barriers to exporting that face your business e.g. human resources-related?

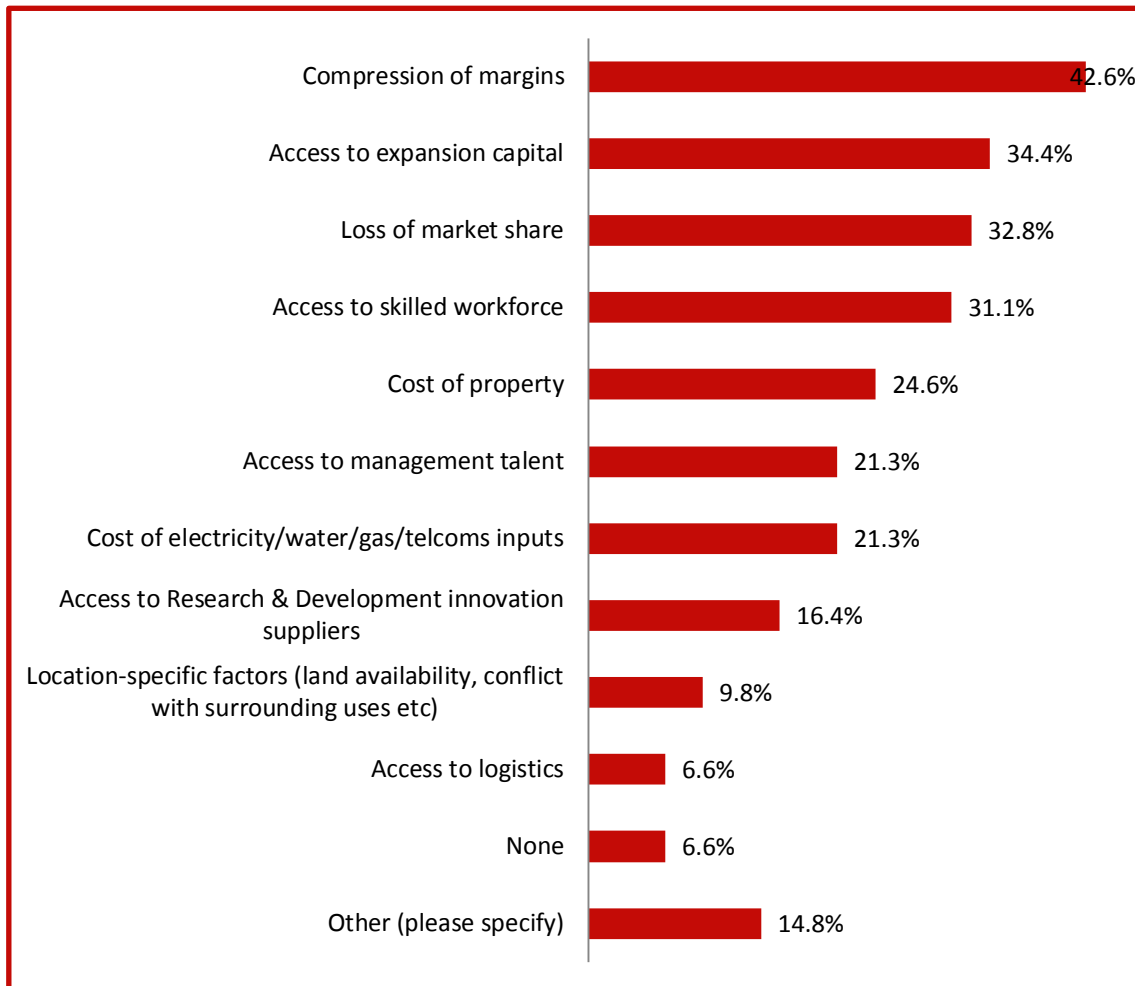
Respondent Number	Response Text
1	1. We are a long way away from the markets 2. We have to import our raw materials to be internationally competitive 4. Costs of making in Australia are higher due to the 'social welfare' subsidy 3. We have re-export that distance to sell as an export ie Australian producers pay (artificially high wages and superannuation are 2 that come to mind)
2	Red tape and paperwork is difficult to follow
3	Current Employee time
4	We need to modify our products to fit export markets which can be done but requires R&D from a large base contract. Export markets for our product are a number of small quantity orders with customisation for each which we are good at and can do but need to design a new platform for the next 15 years (from a large base order)
5	None come to mind
6	None
7	None
8	Need specialist marketing help for unique education business
9	None
10	None
11	Taxation implications caused by a long development time frame being carried but then when a payoff occurs getting smashed in your one good year
12	Australians want to be paid higher local wages and to enjoy good local conditions, but they also want to buy low cost north Asian products. These two desires are incompatible.
13	lots - but we are driving export growth at 30%
14	Having to have large cash deposits in overseas banks that could be used in production & services.
Source: Dandenong South NEC Business Intentions Survey	

5.4 The Future of your Business

Question 15: What are the main barriers to potential expansion (if any)?

The survey allowed respondents to select more than one answer. Businesses surveyed identified that the main barriers to potential expansion are related to compression of margins (43%), access to expansion capital (34%), and loss of market share (33%).

Figure 5.19: Main barriers to potential expansion (multi-response)



Source: Dandenong South NEC Business Intentions Survey

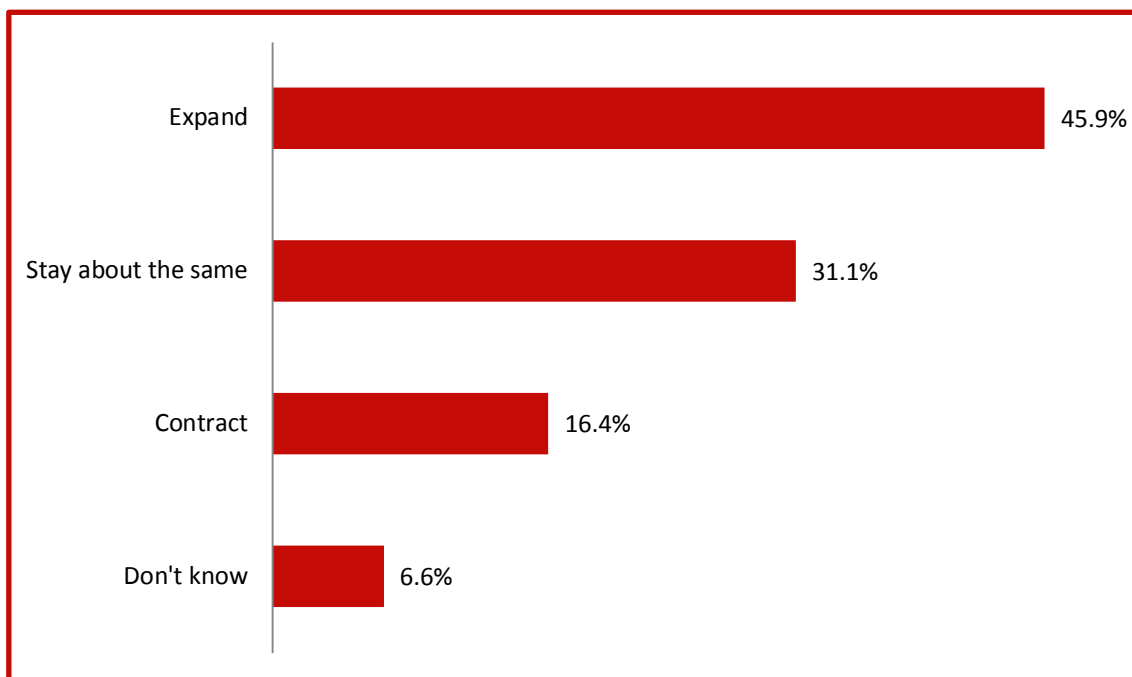
Table 5.16: Main barriers to potential expansion (multi-response)

Answer Options	Response Share	Response Count
Access to expansion capital	34.4%	21
Loss of market share	32.8%	20
Compression of margins	42.6%	26
Access to management talent	21.3%	13
Access to skilled workforce	31.1%	19
Access to logistics	6.6%	4
Access to Research & Development innovation suppliers	16.4%	10
Cost of electricity/water/gas/telecoms inputs	21.3%	13
Cost of property	24.6%	15
Location-specific factors (land availability, conflict with surrounding uses etc)	9.8%	6
None	6.6%	4
Other (please specify)		
<ul style="list-style-type: none"> Manufacturers are having their margins squeezed and their volumes eroded by cheaper import substitutes. it is hard to fund the 'clever' company on reduced profitability. Australian Defence backing Aust manufacturing EPA interference in the industry Roads - Need to complete Ring Road link to Eastern Freeway High operating costs. Need to automate to reduce cost. governance restrictions do not allow for expansion of territory Margins are low because we have to compete with North Asia. Low margins create poor profitability and without profit we can't grow. High AU\$ can hurt. Foreign government regulations. Local Council red tape & slow approvals process 	14.8%	9
Answered question		61
Skipped question		6

Source: Dandenong South NEC Business Intentions Survey

Question 16: In the next 5 years do you anticipate that the number of employees on site will expand or contract?

Almost one-half of businesses (46%) surveyed anticipate the number of employees on-site will expand in the next 5 years, while 31% anticipate the number will stay about the same.

Figure 5.20: Number of employees on site in the next 5 years

Source: Dandenong South NEC Business Intentions Survey

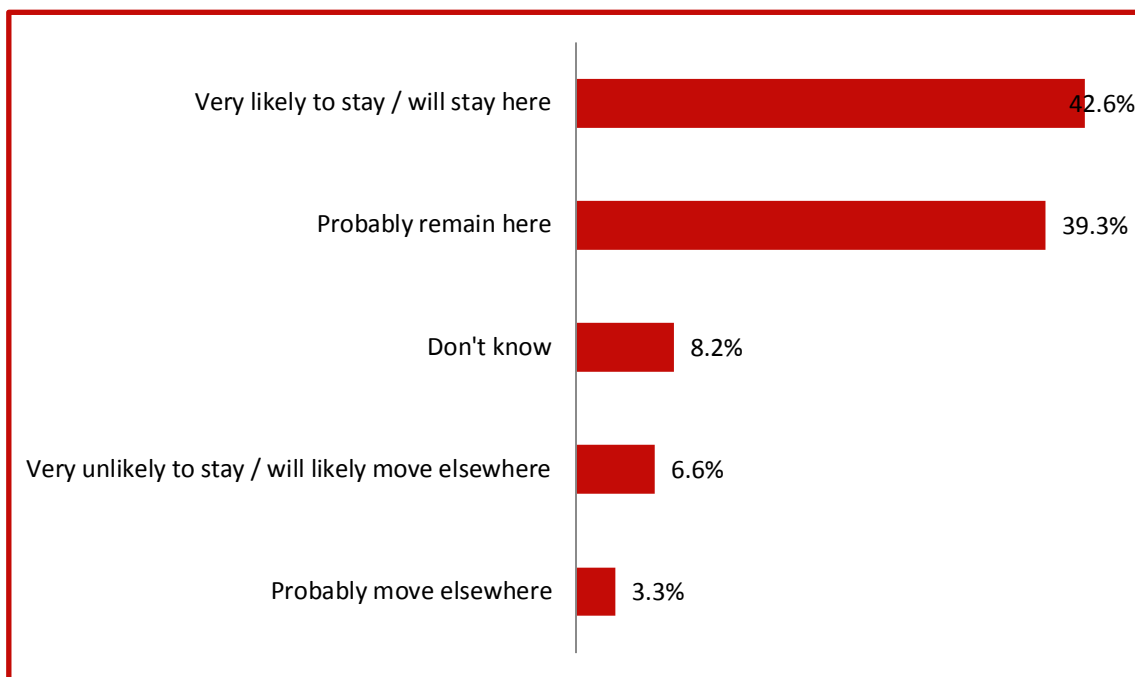
Table 5.17: Number of employees on site in the next 5 years

Answer Options	Response Share	Response Count
Expand	45.9%	28
Contract	16.4%	10
Stay about the same	31.1%	19
Don't know	6.6%	4
Answered question		61
Skipped question		6

Source: Dandenong South NEC Business Intentions Survey

Question 17: How likely is your business to stay in its current location over the next 5 years?

Forty three per cent (43%) of businesses surveyed indicated they are “very likely” to stay in their current location over the next 5 years, while 39% have indicated they will “probably” remain in the same location and 7% indicated they are “very likely to move elsewhere”.

Figure 5.21: Likelihood to stay in its current location over the next 5 years

Source: Dandenong South NEC Business Intentions Survey

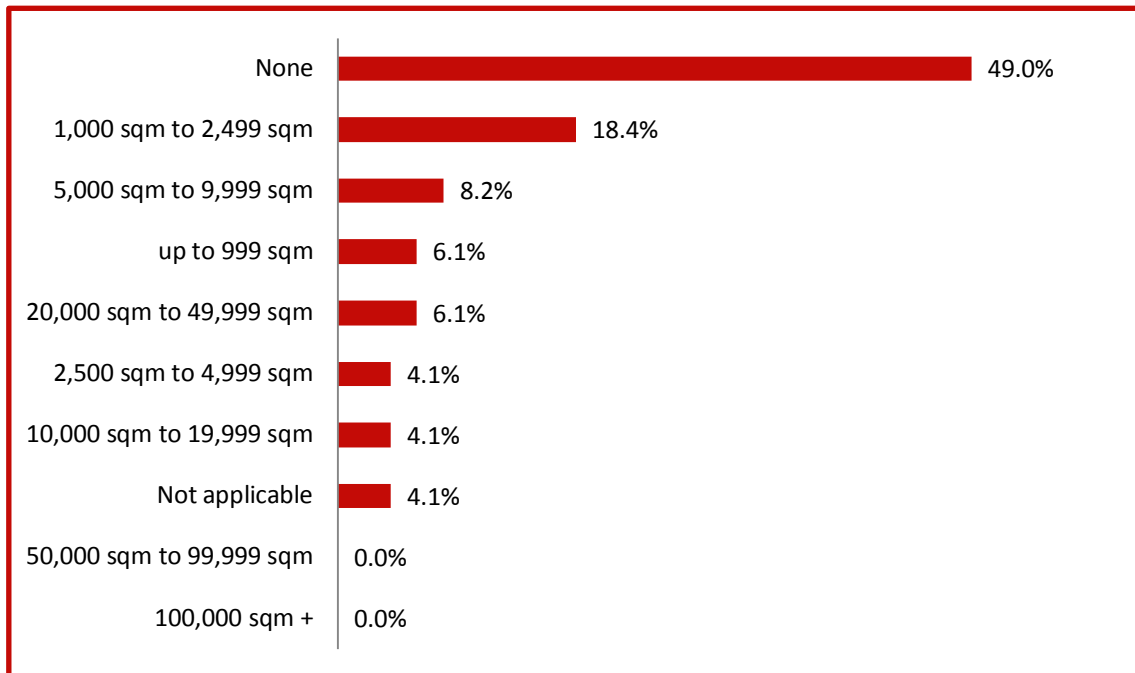
Table 5.18: Likelihood to stay in its current location over the next 5 years

Answer Options	Response Share	Response Count
Very likely to stay / will stay here	42.6%	26
Probably remain here	39.3%	24
Probably move elsewhere	3.3%	2
Very unlikely to stay / will likely move elsewhere	6.6%	4
Don't know	8.2%	5
Answered question		61
Skipped question		6

Source: Dandenong South NEC Business Intentions Survey

Question 18: If your business is likely to stay in this location over the next 5 years, what additional land area will be required for expansion purposes?

The majority of respondents who indicated they are likely to stay in the current location over the coming 5 years will not require additional land for expansion purposes (49%). Other businesses generally require between 1,000m² to 2,499 m² of land (18%).

Figure 5.22: Additional land area required for expansion purposes

Source: Dandenong South NEC Business Intentions Survey

Table 5.19: Additional land area required for expansion purposes

Answer Options	Response Share	Response Count
None	49.0%	24
up to 999 sqm	6.1%	3
1,000 sqm to 2,499 sqm	18.4%	9
2,500 sqm to 4,999 sqm	4.1%	2
5,000 sqm to 9,999 sqm	8.2%	4
10,000 sqm to 19,999 sqm	4.1%	2
20,000 sqm to 49,999 sqm	6.1%	3
50,000 sqm to 99,999 sqm	0.0%	0
100,000 sqm +	0.0%	0
Not applicable	4.1%	2
Answered question		49
Skipped question		18

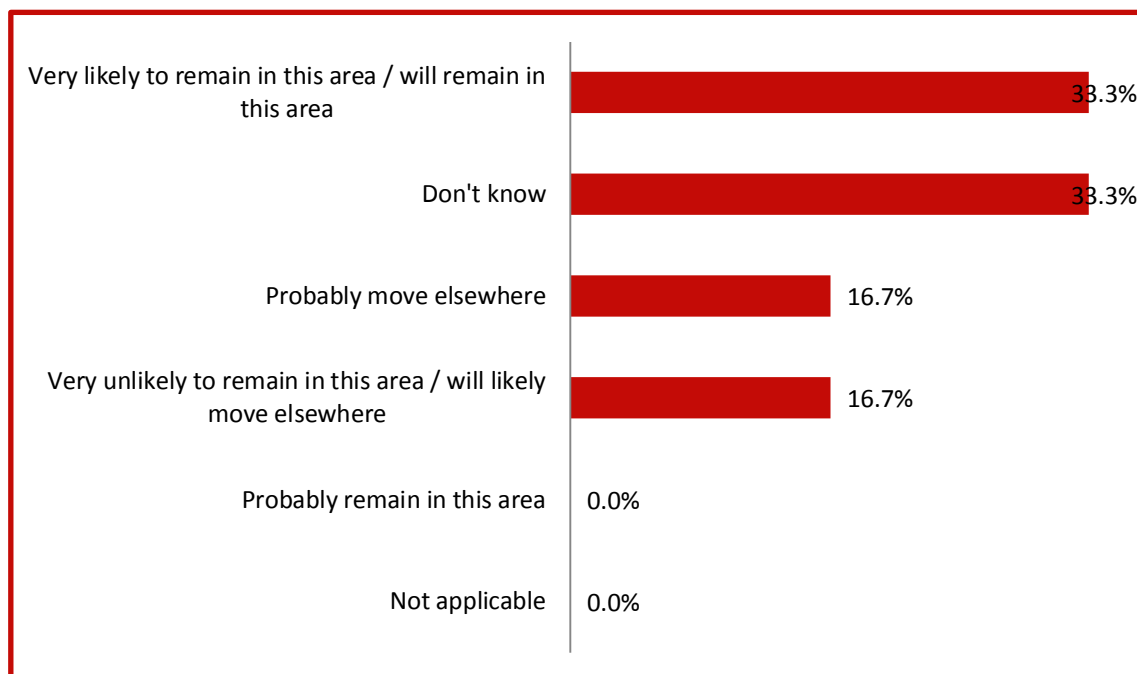
Source: Dandenong South NEC Business Intentions Survey

5.5 Alternative Locations

Question 19: If your business was to move from its current location, how likely is the business to remain in the Dandenong South National Employment Cluster?

The majority of businesses surveyed skipped this question, as they had previously indicated their business is unlikely to move. Of the six responses received, two indicated they will very likely remain in the area, one indicated they will likely move elsewhere, one indicated they are very likely to move elsewhere, and two are unsure.

Figure 5.23: Likelihood of business to remain in the Dandenong South National Employment Cluster



Source: Dandenong South NEC Business Intentions Survey

Table 5.20: Likelihood of business to remain in the Dandenong South National Employment Cluster

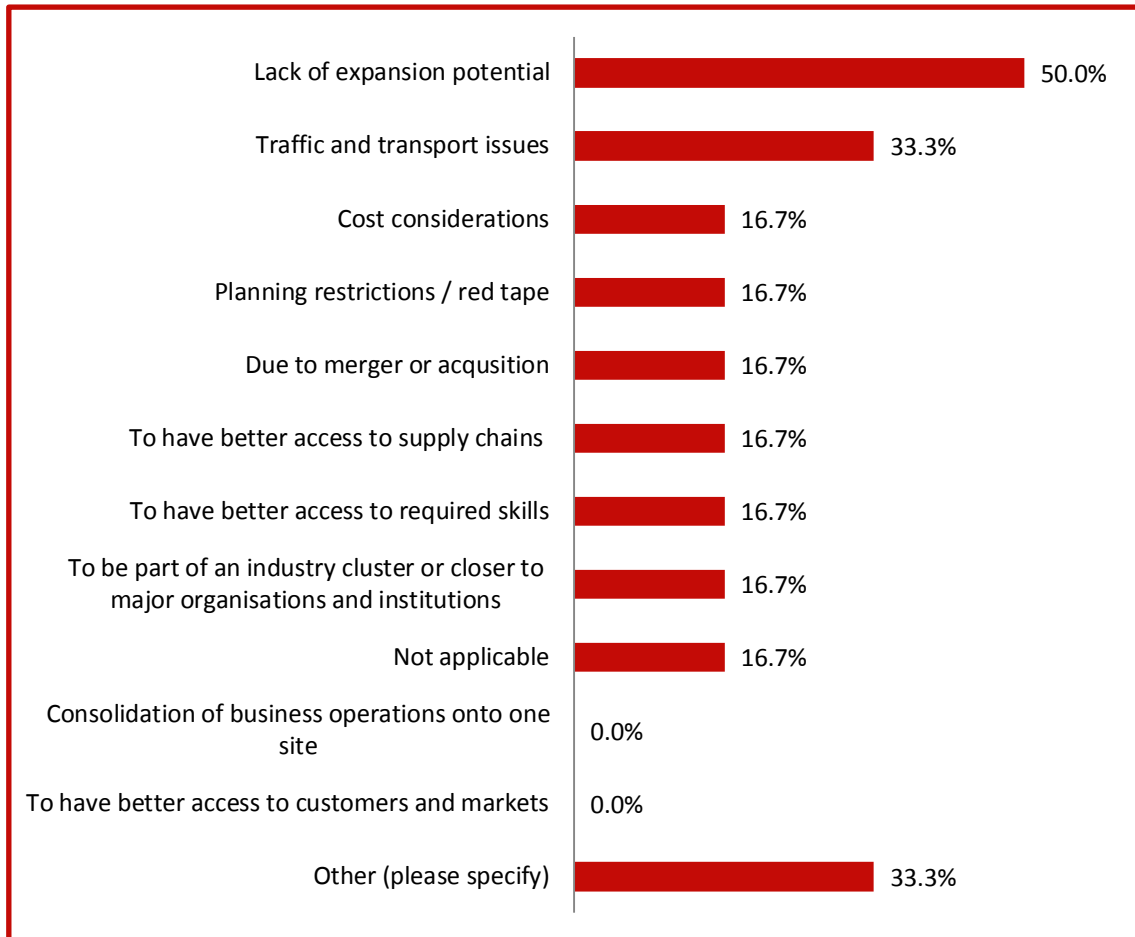
Answer Options	Response Share	Response Count
Very likely to remain in this area / will remain in this area	33.3%	2
Probably remain in this area	0.0%	0
Probably move elsewhere	16.7%	1
Very unlikely to remain in this area / will likely move elsewhere	16.7%	1
Don't know	33.3%	2
Not applicable	0.0%	0
Answered question		6
Skipped question		61

Source: Dandenong South NEC Business Intentions Survey

Question 20: What would be your main reasons for moving out of the Dandenong South National Employment Cluster?

The survey allowed respondents to select more than one answer. One-half of the businesses surveyed agreed that cost considerations would be the main reasons for moving out of the Broadmeadows Major Activity Centre (50%). Other reasons include traffic and transport issues (33%), cost considerations (17%), planning restrictions (17%), merger or acquisition (17%), better access to supply chains (17%), better access to required skills (17%), or to be part of an industry cluster (17%).

Figure 5.24: Reasons for moving out of the Dandenong South National Employment Cluster (multi-response)



Source: Dandenong South NEC Business Intentions Survey

Table 5.211: Reasons for moving out of the Dandenong South National Employment Cluster (multi-response)

Answer Options	Response Share	Response Count
Consolidation of business operations onto one site	0.0%	0
Lack of expansion potential	50.0%	3
Cost considerations	16.7%	1
Planning restrictions / red tape	16.7%	1
Due to merger or acquisition	16.7%	1
To have better access to customers and markets	0.0%	0
To have better access to supply chains	16.7%	1
To have better access to required skills	16.7%	1
To be part of an industry cluster or closer to major organisations and institutions	16.7%	1
Traffic and transport issues	33.3%	2
Not applicable	16.7%	1
Other (please specify)	33.3%	2
Answered question		6
Skipped question		61

Source: Dandenong South NEC Business Intentions Survey

**Question 21: What alternative locations would you seriously consider for your business?
List the suburbs/areas.**

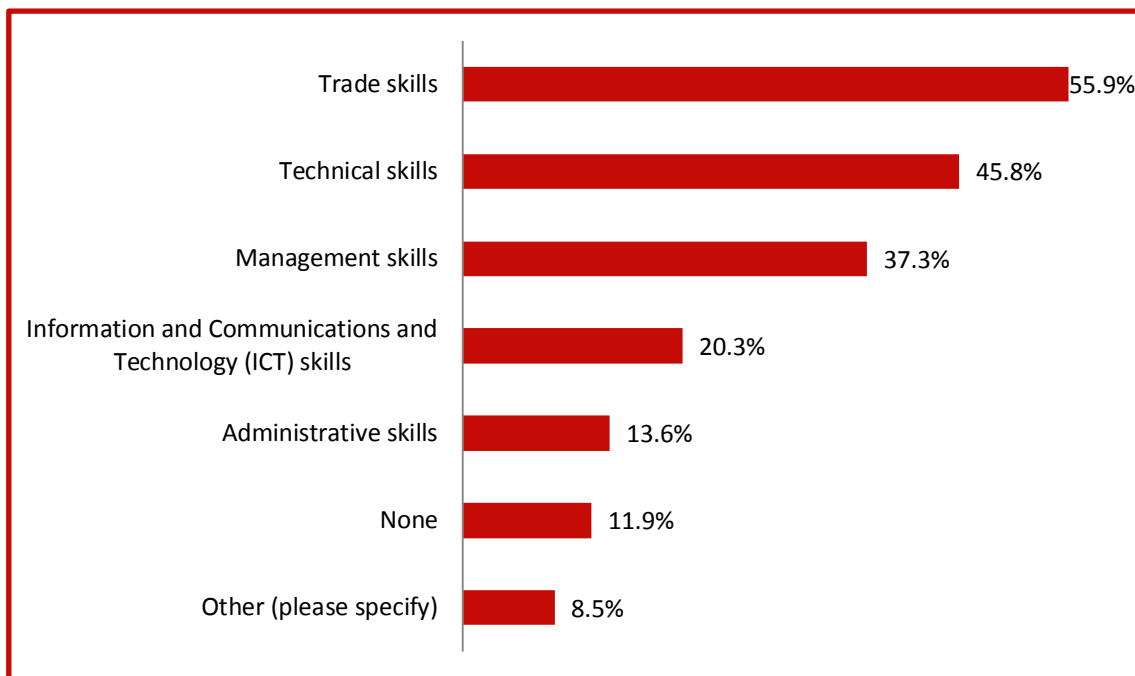
Table 5.22: Alternative locations businesses would consider

Respondent Number	Location:
1	Seaford
2	Dingley
3	Cardinia Shire
4	Cranbourne Nth

Source: Dandenong South NEC Business Intentions Survey

Question 22: Thinking about your workforce over the next 5 years, what particular skill shortages may affect your business and require upskilling? :

The survey allowed respondents to select more than one answer. The main skills requirements for over the next 5 years are trade skills (56%), technical skills (46%), and management skills (37%).

Figure 5.25: Skill shortages that may require up-skilling over the next 5 years (multi-response)

Source: Dandenong South NEC Business Intentions Survey

Table 5.23: Skill shortages that may require upskilling over the next 5 years (multi-response)

Answer Options	Response Share	Response Count
Trade skills	55.9%	33
Technical skills	45.8%	27
Information and Communications and Technology (ICT) skills	20.3%	12
Administrative skills	13.6%	8
Management skills	37.3%	22
None	11.9%	7
Other (please specify)	8.5%	5
• If we can't pay our people less (ie a market based wage), then we need to get greater flexibility from them.		
• Lack of government funding		
• Problem solving, continuous improvement		
• If we don't make money we won't need to up skill our workforce, will we?		
• Limited cultural diversity of people with food handling skills and interest in pursuing employment in food manufacturing		
Answered question		59
Skipped question		8

Source: Dandenong South NEC Business Intentions Survey

5.6 Impact of Infrastructure / Investment Initiatives

Question 23: To what extent would improved road infrastructure support your business and encourage you to stay in the precinct?

A total of 39% of businesses surveyed indicated that improved road infrastructure would “greatly increase” their intention to stay, while 19% indicated it would “moderately increase” their intention to stay, with 42% indicating it would have “no impact” on their intention to stay.

Table 5.24: Impact of improved road infrastructure on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of Responses	23	11	25	2.03	59
Per cent	39%	19%	42%		
Answered question					59
Skipped question					8

Source: Dandenong South NEC Business Intentions Survey

Question 24: To what extent would improved public transport infrastructure support your business and encourage you to stay in the precinct?

A total of 37% of businesses surveyed indicated that improved public transport infrastructure would have “no impact” on their intention to stay, while 31% indicated it would “greatly increase” their intention to stay, with 32% saying it would “moderately increase” their intention to stay.

Table 5.252: Impact of improved public transport infrastructure on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of Responses	18	19	22	2.07	59
Per cent	31%	32%	37%		
Answered question					59
Skipped question					8

Source: Dandenong South NEC Business Intentions Survey

Question 25: To what extent would improved broadband (e.g. access to the National Broadband Network) support your business and encourage you to stay in the precinct?

A total of 49% of businesses surveyed indicated that improved broadband would “greatly increase” their intention to stay, with 25% of businesses indicating it would “moderately increase” their intention to stay and with 25% indicating it would have “no impact” on their intention to stay.

Table 5.26: Impact of improved broadband on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of Responses	29	15	15	1.76	59
Per cent	49%	25%	25%		
Answered question					59
Skipped question					8

Source: Dandenong South NEC Business Intentions Survey

Question 26: To what extent would improved utilities infrastructure (e.g. gas, electricity, water, sewerage) support your business and encourage you to stay in the precinct?

A total of 20% of businesses surveyed indicated that improved utilities infrastructure would “greatly increase” their intentions to stay, and with a further 36% indicating it would “moderately increase” their intention to stay and 44% indicating it would have “no impact” on their decision to stay

Table 5.27: Impact of improved utilities infrastructure on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of Responses	12	21	26	2.24	59
Per cent	20%	36%	44%		
Answered question					59
Skipped question					8

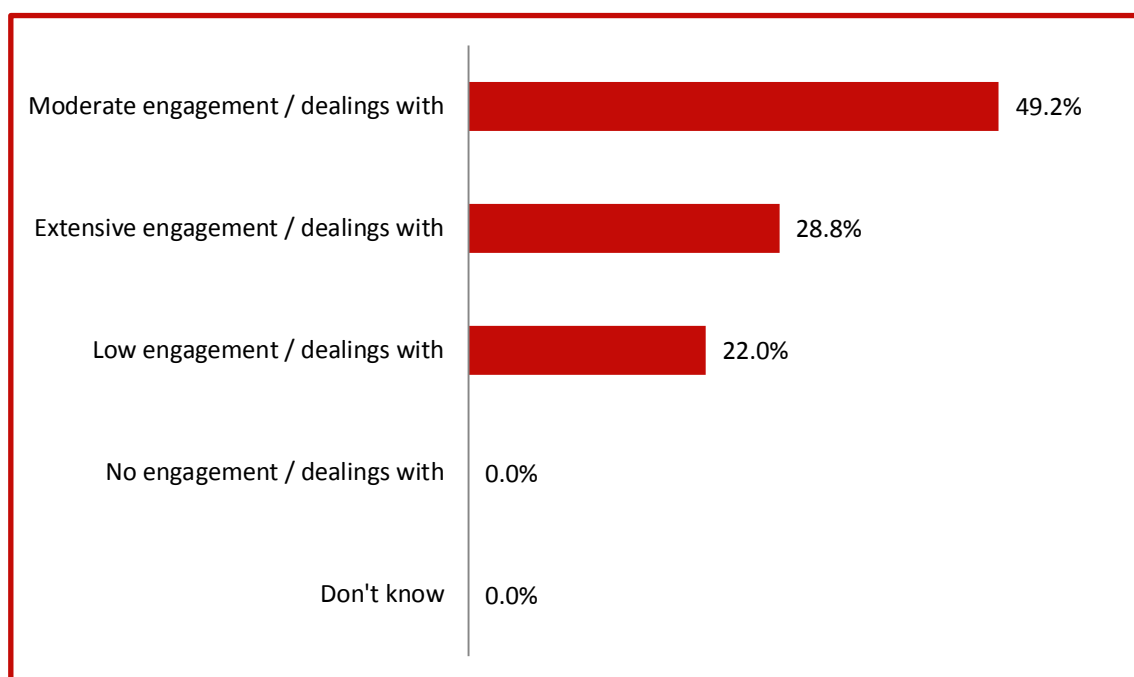
Source: Dandenong South NEC Business Intentions Survey

5.7 Building Relationships

Question 27: How would you rate the extent of relationships your business has with other businesses, services or institutions in the precinct?

A total of 49% of businesses surveyed indicated a “moderate engagement” with other businesses in the precinct, and 29% indicated an “extensive level of engagement”, with a further 22% indicating a “low” level of engagement.

Figure 5.26: Extent of relationships the business has with other businesses, services or institutions in the precinct.



Source: Dandenong South NEC Business Intentions Survey

Table 5.28: Extent of relationships the business has with other businesses, services or Institutions in the precinct.

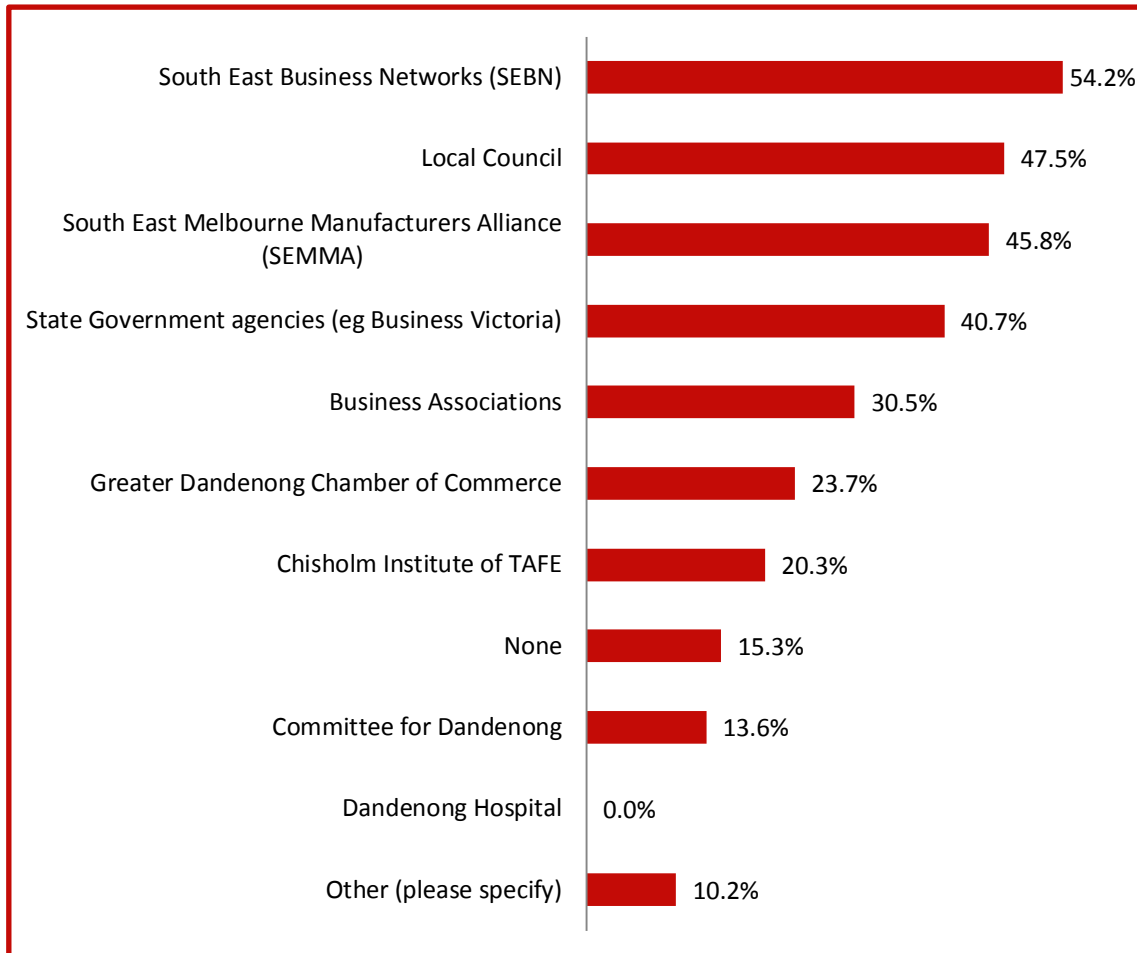
Answer Options	Response Share	Response Count
Extensive engagement / dealings with	28.8%	17
Moderate engagement / dealings with	49.2%	29
Low engagement / dealings with	22.0%	13
No engagement / dealings with	0.0%	0
Don't know	0.0%	0
Answered question		59
Skipped question		8

Source: Dandenong South NEC Business Intentions Survey

Question 28: Which are the main businesses or institutions in the precinct that your business currently engages or collaborates with?

The survey allowed respondents to select more than one answer. The businesses or institutions that businesses currently engage or collaborate with most frequently are the South East Business Networks (54%), Local Council (48%), and South East Melbourne Manufacturers Alliance (46%).

Figure 5.27: Main businesses or institutions that the business is currently engaging or collaborating with (multi-response)



Source: Dandenong South NEC Business Intentions Survey

Table 5.29: Main businesses or institutions that the business is currently engaging or collaborating with (multi-response)

Answer Options	Response Share	Response Count
Local Council	47.5%	28
State Government agencies (e.g. Business Victoria)	40.7%	24
Chisholm Institute of TAFE	20.3%	12
South East Business Networks (SEBN)	54.2%	32
South East Melbourne Manufacturers Alliance (SEMMA)	45.8%	27
Committee for Dandenong	13.6%	8
Greater Dandenong Chamber of Commerce	23.7%	14
Business Associations	30.5%	18
Dandenong Hospital	0.0%	0
None	15.3%	9
Other (please specify)	10.2%	6
Answered question		59
Skipped question		8

Source: Dandenong South NEC Business Intentions Survey

Question 29: What else, if anything, would make the precinct a more attractive location for your business in the future? Please indicate challenges (technical and non-technical) that you would like to overcome.

Table 5.30: Challenges that businesses would like to overcome

Number	Response Text
1	Lower land taxes, energy network upgrade, upskilling of mid-level staff
2	Minimum wages set by post code and not as national standard. The cost of living is different in Narre warren to the Melbourne cbd or Sydney's north shore. why should the cost of labour be the same?
3	Employment/employees are some of our biggest challenges
4	Stronger clusters of businesses/supply chain integration
5	None come to mind
6	Less disruptive planning works, local council facilitation, Less EPA interference, Worksafe cooperative approach, tax Incentives and concessions, open forum hearings
7	Grants assistance made easier and fairer for small business, for R&D, technical, expansion, employment, less paperwork to apply for grants.
8	Completing the Ring Road to reduce transportation costs for our customers in the north and west of Melbourne and in Northern VIC
9	Reduced road access congestion
10	Reduce levels of microwave/wife and EMR tower radiation
11	Parkland that can be enjoyed at lunch breaks by staff
12	Fix the transport issues, particularly Abbots Road and open up Remington Drive to the freeway
13	The precinct is ok, that is why we are here. When the government succeed in eliminating all manufacturing form the Australian economy, then we will no longer be here.
14	Public Transport
15	Clearer focus of what the region does and a huge expansion of the promotion of this region as a Manufacturing Zone, better than anywhere else in Australia, This can be created through significant funding by government for a campaign to be launched and continued to change the perception of Manufacturing, the region and drive work into the Region from elsewhere in Australia and from key markets overseas.
16	We have a need to venture into IT products which work in conjunction with our current products, and we need to either employ or partner with suitable IT savvy group or individuals.
17	1. Improved security especially out-of-hours. Prevent dumping rubbish in street, trespassers on site and hoon drivers in street. 2. Quality cafes for staff lunches. 3. Efficient predictable faster service at Council for building expansions.
18	Being able to attract the right employees
19	Decrease traffic congestion
20	An improved external perception of Dandenong that makes it attractive for people to want to look for employment here
21	A Council that shows an interest in helping business or at least not hindering - while there is a manufacturer releasing black smoke into the atmosphere for everyone to see and suffer from, nothing is done about it - in other areas rules are over policed where there is no objective reason for concern
22	If & when we have to expand finding a suitable location nearby
23	Less Council covenants. Less involvement of government at all levels.

Answered Question

23

Source: Dandenong South NEC Business Intentions Survey

5.8 Conclusions

1. Businesses chose to locate in the Dandenong South NEC principally due to land availability (31%) and proximity to business clusters, organisations and institutions (22%).
2. Limitations or drawbacks of the location are distance from clients (33%), distance from public transport (25%) and distance from where staff live (19%).
3. Approximately one in five businesses surveyed indicate the precinct has a poor reputation (19%), while planning restrictions are regarded by 28% of respondents as the main limitation of doing business in the Dandenong South NEC.
4. Approximately one-half of businesses surveyed are currently exporting overseas (53%), and an additional 18% of businesses are interested in doing so. Businesses that are not currently exporting noted the main barrier is related to the high level of competition internationally.
5. Compression of margins (43%) is the main barrier to expansion for businesses located in the Dandenong South NEC.
6. A total of 43% of businesses are very likely/ will remain in the Dandenong South NEC over the next 5 years.
7. Approximately half the businesses surveyed in the Dandenong South NEC (49%) would greatly increase their intention to stay in the precinct through improved broadband.
8. Trade skills (56%) and technical skills (46%) are the main upskilling requirements over the next 5 years for Dandenong South NEC businesses.
9. The majority of Dandenong South NEC businesses have moderate to extensive levels of engagement (78% combined) with other businesses, services or institutions in the precinct.

6 FISHERMANS BEND URA – SURVEY FINDINGS

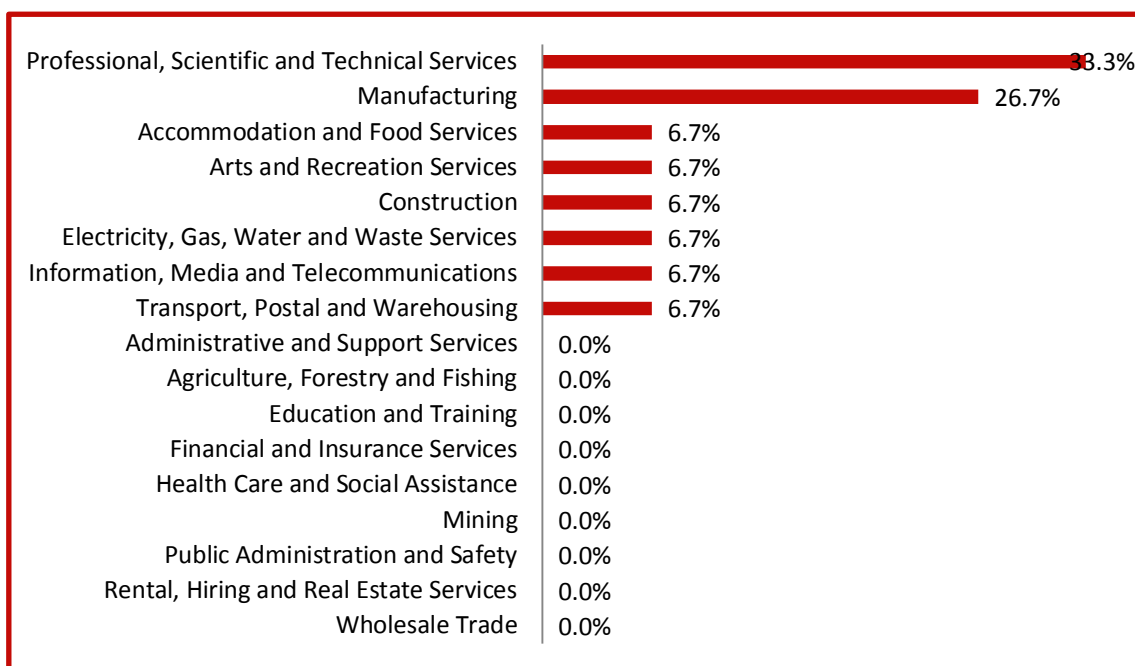
6.1 Introduction

The online business intentions survey was distributed to 105 businesses in the Fishermans Bend URA, with a total of 16 responses received. This represents a response rate of approximately 15%.

One-third of the business respondents were associated with the professional, scientific and technical services sector (33%), followed by manufacturing (27%). Other respondents were evenly spread across accommodation and food services (7%), arts and recreation services (7%), construction (7%), electricity, gas, water and waste services (7%), information, media and telecommunications (7%), and transport, postal and warehousing (7%).

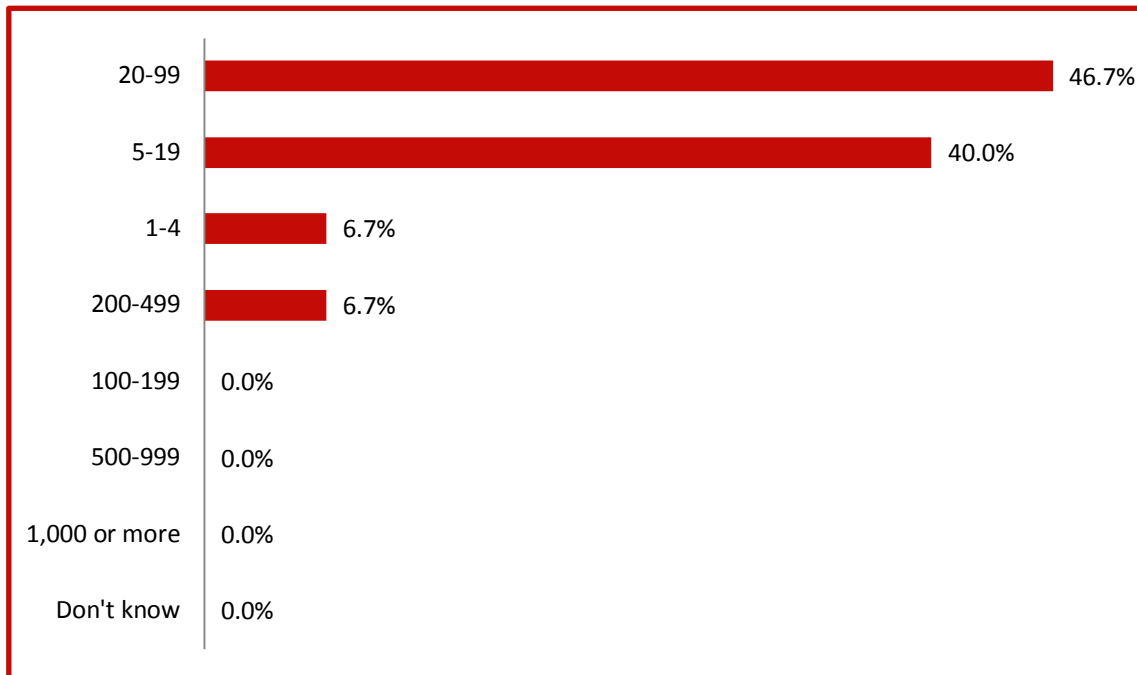
A significant majority of respondents were small to medium-sized businesses, with 5-99 employees on site (87%); the remaining respondents are evenly split between micro-businesses of 1-4 employees on site (7%), and major businesses of 200-499 employees on-site (7%).

Figure 6.1: Core area of business undertaken at the site



Source: Fishermans Bend URA Business Intentions Survey

Figure 6.2: Number of employees that work from the site



Source: Fishermans Bend URA Business Intentions Survey

Figure 6.3 outlines the boundaries of the Fishermans Bend URA study area, while Sections 6.2 to 6.8 provide a summary of survey results.

Figure 6.3: Fishermans Bend Urban Renewal Area – Precinct Location



Source: Metropolitan Planning Authority

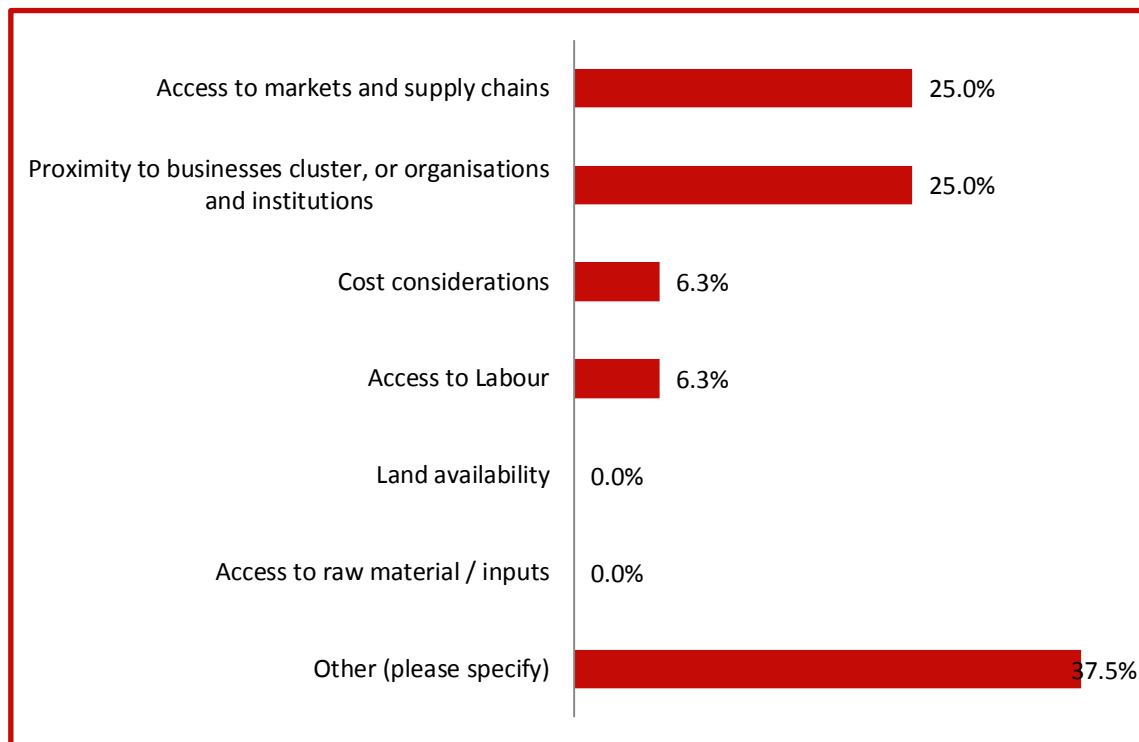
6.2 Choosing the Best Location

Question 1: What was the primary reason for your business moving to its current location

The online survey explored reasons as to why businesses chose to locate in Fishermans Bend URA. The most frequent responses were as follows:

A total of 25% of businesses surveyed were influenced by the location's access to markets and supply chains, with 25% also influenced by the location's proximity to the business cluster, or organisations and institutions.

Figure 6.4: Primary reason for businesses to move to its current location



Source: Fishermans Bend URA Business Intentions Survey

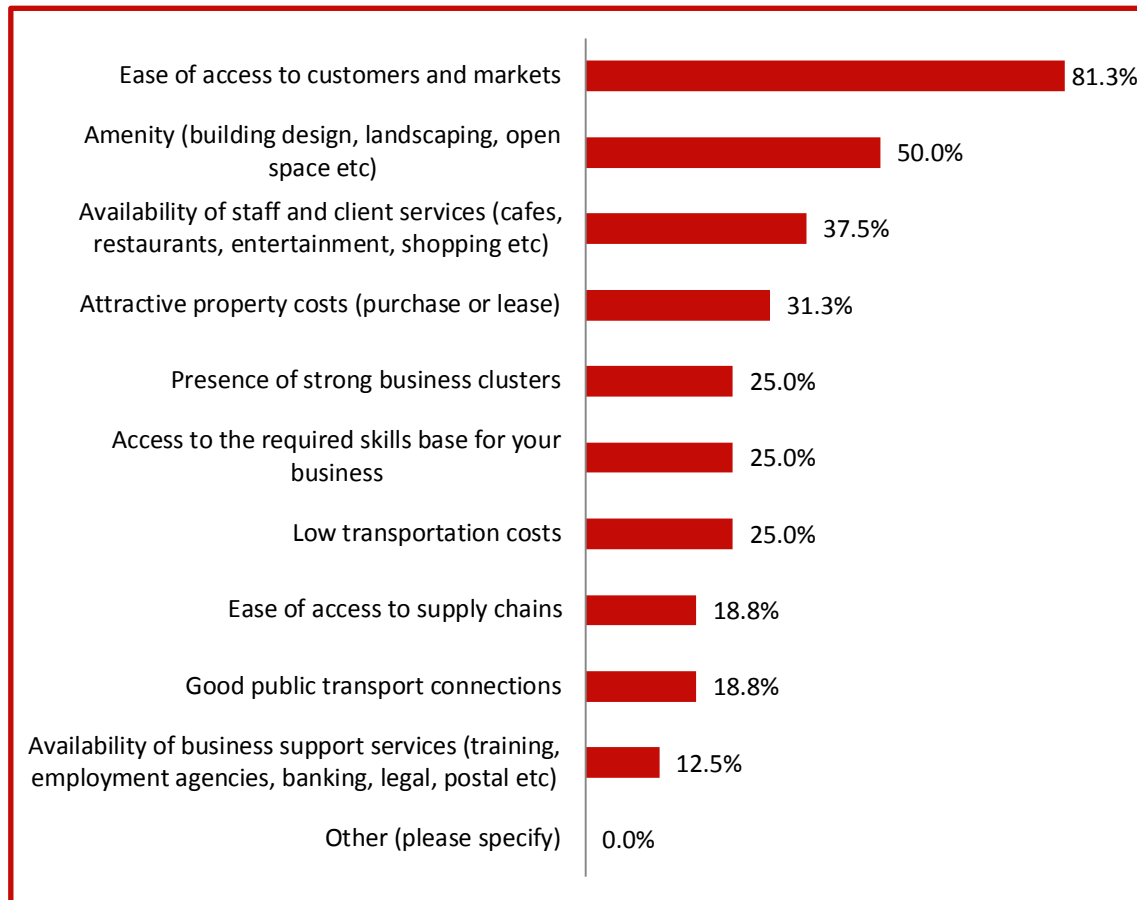
Table 6.1: Primary reason for businesses to move to its current location

Answer Options	Response Share	Response Count
Land availability	0.0%	0
Cost considerations	6.3%	1
Access to markets and supply chains	25.0%	4
Access to raw material / inputs	0.0%	0
Access to Labour	6.3%	1
Proximity to businesses cluster, or organisations and institutions	25.0%	4
Other (please specify)		
<ul style="list-style-type: none"> Toyota Australia has had a presence in Fishermans Bend for over 50 years Proximity to the super loop Proximity to freeway interchange Proximity to clientele in the city centre Client access via Freeways East, North and West. Central to all our employees 	37.5%	6
Answered question		16
Skipped question		0
Source: Fishermans Bend URA Business Intentions Survey		

Question 2: What are the key benefits or strengths of the current location of your premises?

Businesses surveyed indicated the key benefits or strengths of Fishermans Bend URA relate to the location's ease of access to customers and markets (81%), high amenity (50%), and availability of staff and client services (38%).

Figure 6.5: Key benefits or strength of the current location (multi-response)



Source: Fishermans Bend URA Business Intentions Survey

Table 6.2: Key benefits or strength of the current location (multi-response)

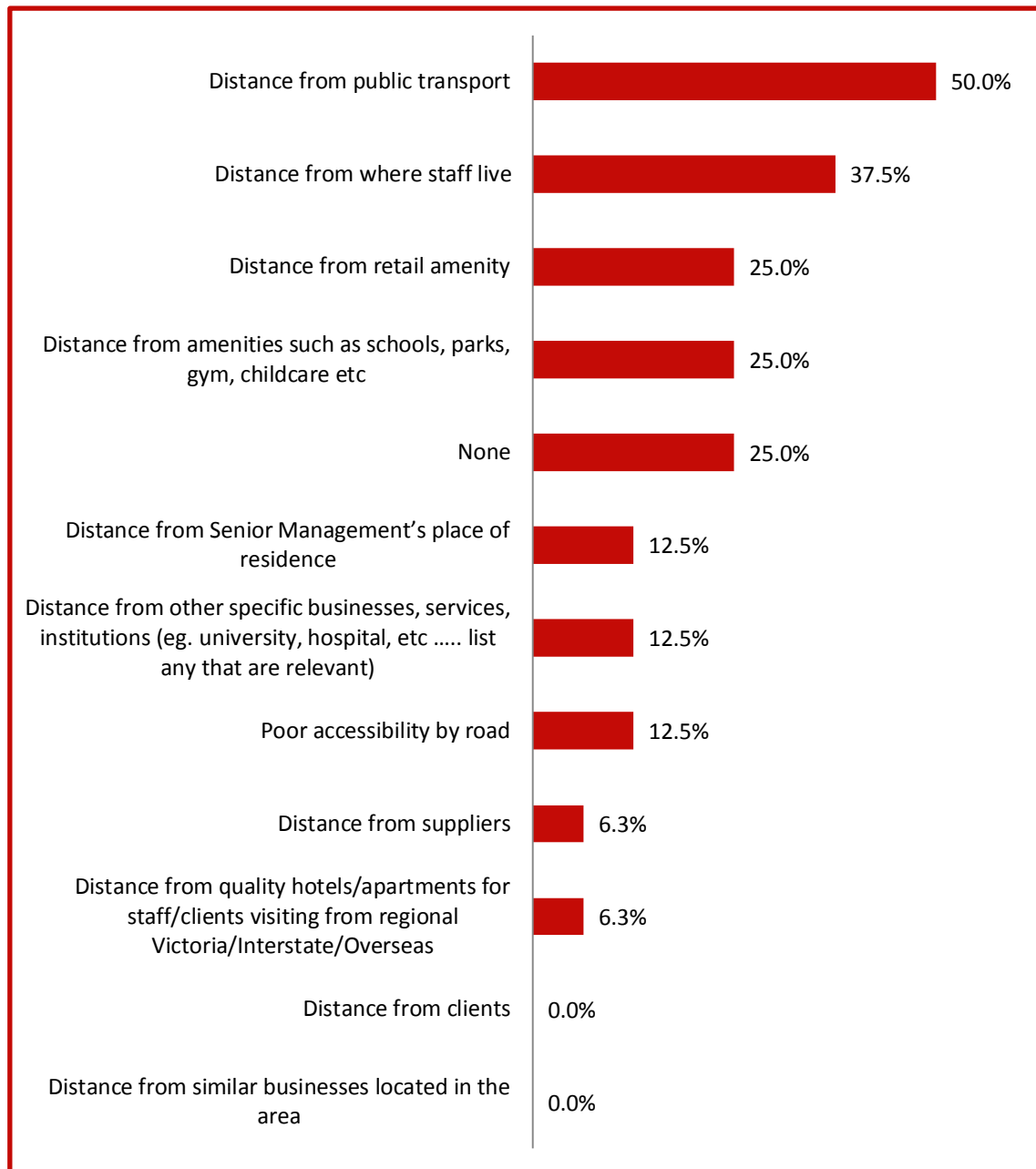
Answer Options	Response Share	Response Count
Attractive property costs (purchase or lease)	31.3%	5
Ease of access to customers and markets	81.3%	13
Ease of access to supply chains	18.8%	3
Availability of business support services (training, employment agencies, banking, legal, postal etc)	12.5%	2
Availability of staff and client services (cafes, restaurants, entertainment, shopping etc)	37.5%	6
Presence of strong business clusters	25.0%	4
Access to the required skills base for your business	25.0%	4
Low transportation costs	25.0%	4
Amenity (building design, landscaping, open space etc)	50.0%	8
Good public transport connections	18.8%	3
Other (please specify)	0.0%	0
Answered question		16
Skipped question		0

Source: Fishermans Bend URA Business Intentions Survey

Question 3: What do you think are the main locational limitations or drawbacks of your current location?

Businesses surveyed indicated that the main limitations or drawbacks at Fishermans Bend relate to the location's distance from public transport (50%), distance from where staff live (38%), and distance from retail amenity (25%).

Figure 6.6 Main locational limitations or drawbacks of the current location (multi-response)



Source: Fishermans Bend URA Business Intentions Survey

Table 6.3: Main locational limitations or drawbacks of the current location (multi-response)

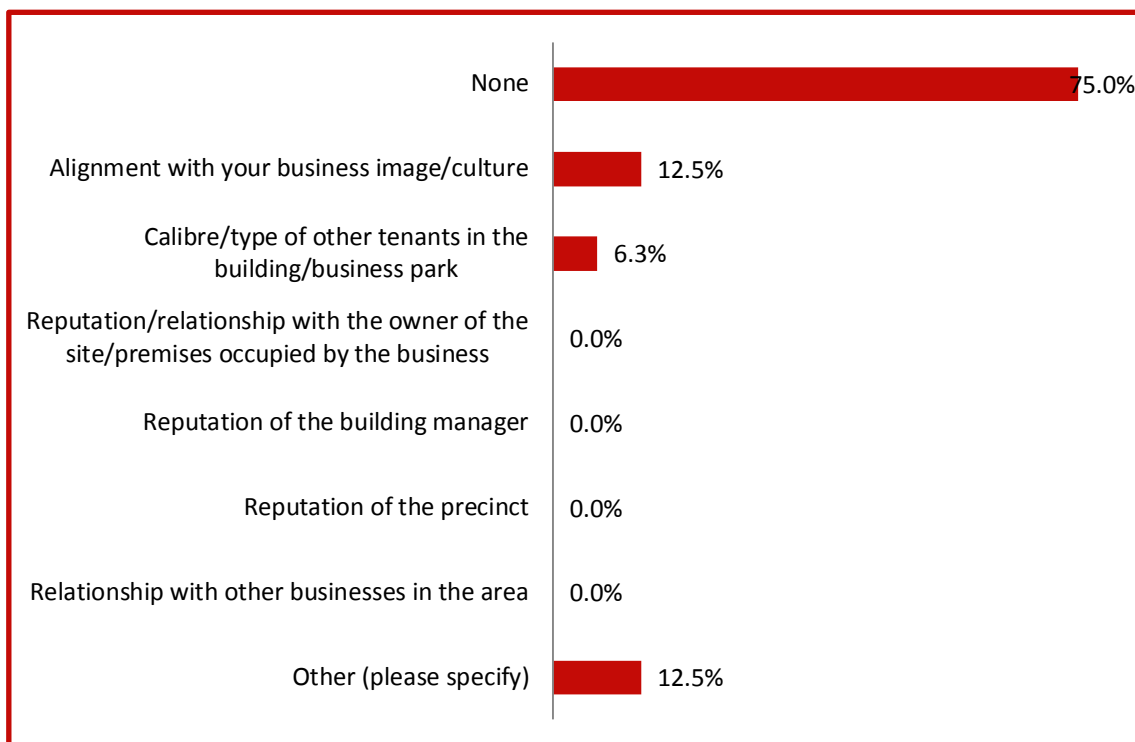
Answer Options	Response Share	Response Count
Distance from clients	0.0%	0
Distance from suppliers	6.3%	1
Distance from similar businesses located in the area	0.0%	0
Distance from where staff live	37.5%	6
Distance from Senior Management's place of residence	12.5%	2
Distance from public transport	50.0%	8
Distance from other specific businesses, services, institutions (e.g.. university, hospital, etc list any that are relevant)	12.5%	2
Poor accessibility by road	12.5%	2
Distance from retail amenity	25.0%	4
Distance from amenities such as schools, parks, gym, childcare etc.	25.0%	4
Distance from quality hotels/apartments for staff/clients visiting from regional Victoria/Interstate/Overseas	6.3%	1
None	25.0%	4
Other (please specify)		
<ul style="list-style-type: none"> • Additionally we have concerns with the growth in residential dwellings in the area and corresponding congestion without improvement in infrastructure, services and open space • car parking for visitors and staff • be good to have more public transport/trams as parking is very limited in Port Melbourne • Traffic has got heaps worse since we moved here 11 years ago 		4
Answered question		16
Skipped question		0

Source: Fishermans Bend URA Business Intentions Survey

Question 4: What do you think are the main image/reputation/relationship limitations or drawbacks of your current location?

The majority of businesses surveyed did not note any image/reputation/relationship limitations at Fishermans Bend (75%).

Figure 6.7: Main image/reputation/relationship limitations of the current location



Source: Fishermans Bend URA Business Intentions Survey

Table 6.4: Main image/reputation/relationship limitations of the current location

Answer Options	Response Share	Response Count
Reputation/relationship with the owner of the site/premises occupied by the business	0.0%	0
Reputation of the building manager	0.0%	0
Alignment with your business image/culture	12.5%	2
Calibre/type of other tenants in the building/business park	6.3%	1
Reputation of the precinct	0.0%	0
Relationship with other businesses in the area	0.0%	0
None	75.0%	12
Other (please specify)		
<ul style="list-style-type: none"> Uncertainty of surrounding land use and lack of government/infrastructure planning aligned with expected residential growth Public transport and parking 	12.5%	2
Answered question		16
Skipped question		0

Source: Fishermans Bend URA Business Intentions Survey

Question 5: Are there any design/features of the site/building that are a drawback to your current location?

Business owners were asked to indicate any design features of the site or building that may be a limitation to their location. Businesses surveyed noted parking for staff (44%), parking for clients/customers (38%), and the limited size of the site (31%) as drawbacks to their current location.

Figure 6.8: Design/features of the site/building that are a drawback to the current location (multi-response)



Source: Fishermans Bend URA Business Intentions Survey

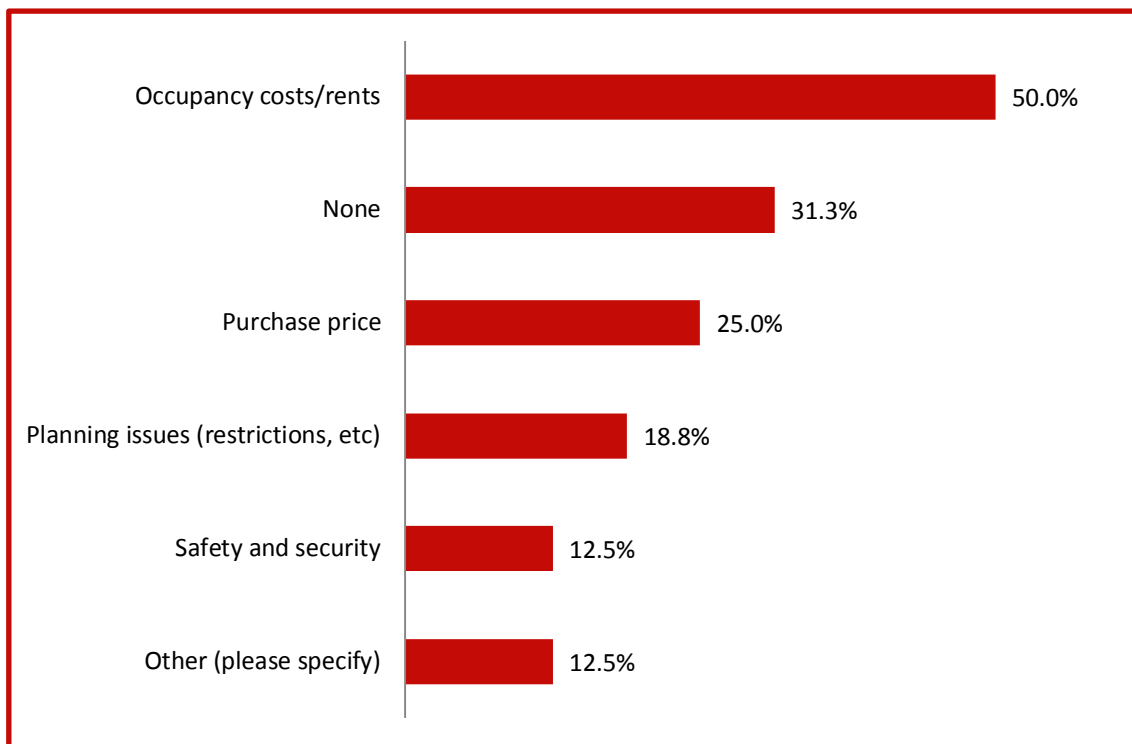
Table 6.5: Design/features of the site/building that are a drawback to the current location (multi-response)

Answer Options	Response Share	Response Count
Size of site/premises	31.3%	5
Ability to have purpose-built premises	12.5%	2
Green rating/sustainability initiatives	6.3%	1
IT infrastructure	18.8%	3
Quality/style of fit-out	6.3%	1
Quality/style of building/accommodation	12.5%	2
Availability of parking for staff	43.8%	7
Availability of parking for clients/customers	37.5%	6
None	31.3%	5
Other (please specify)		
• Breakout / meeting room space for occasional meeting requirements	6.3%	1
Answered question		16
Skipped question		0

Source: Fishermans Bend URA Business Intentions Survey

Question 6: What are the main costs/other limitations or drawbacks of your current location?

The main limitations of the current location for businesses are related to occupancy costs/rents (50%) and purchase price (25%). However, almost one-third (31%) of businesses indicated they do not have any costs or other limitations at their current location.

Figure 6.9: Main costs/other limitations or drawbacks of the current location (multi-response)

Source: Fishermans Bend URA Business Intentions Survey

Table 6.6: Main costs/other limitations or drawbacks of the current location (multi-response)

Answer Options	Response Share	Response Count
Occupancy costs/rents	50.0%	8
Purchase price	25.0%	4
Planning issues (restrictions, etc)	18.8%	3
Safety and security	12.5%	2
None	31.3%	5
Other (please specify)	12.5%	2
• Increasing congestion will have implications for workplace productivity		
• Some shared break out or meeting room space for occasional use would be ideal.		
Answered question		16
Skipped question		0

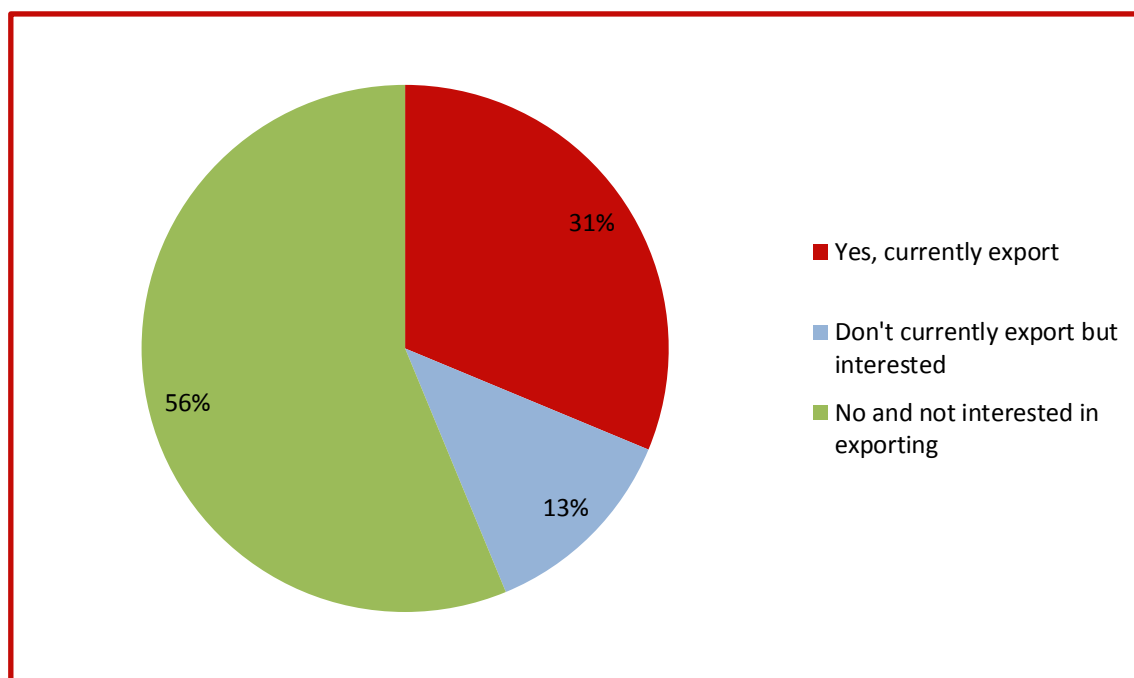
Source: Fishermans Bend URA Business Intentions Survey

6.3 Exporting

Question 7: Does your business currently export goods or services overseas, or is your business interested in exporting?

Of the businesses surveyed, 31% currently export overseas, 13% are not currently exporting but are interested in exporting in the future, and 56% have no interest in exporting.

Figure 6.10: Businesses currently exporting goods and services overseas



Source: Fishermans Bend URA Business Intentions Survey

Table 6.7: Businesses currently exporting goods and services overseas

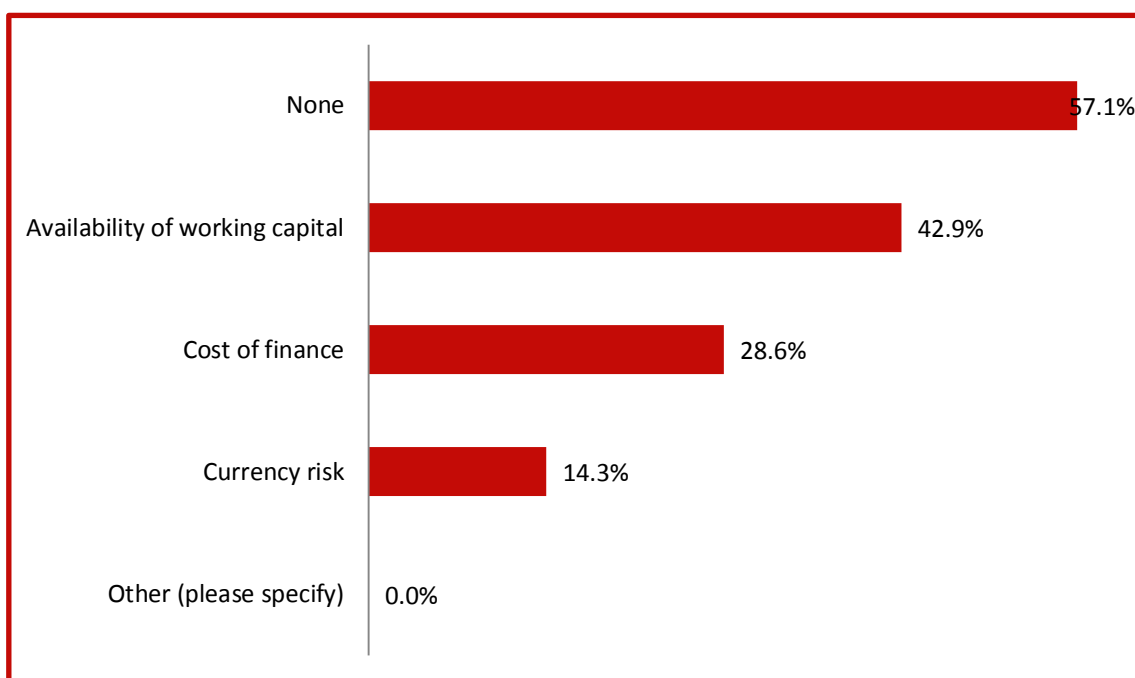
Answer Options	Response Share	Response Count
Yes, currently export	31.3%	5
Don't currently export but interested	12.5%	2
No and not interested in exporting	56.3%	9
Answered question		16
Skipped question		0

Source: Fishermans Bend URA Business Intentions Survey

Question 8: What are the main finance-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. A total of 57% of the respondents did not note any finance-related barriers to exporting, while 43% noted the lack of working capital, and 28% noted the cost of finance as finance-related barriers to exporting.

Figure 6.11: Main finance-related barriers to exporting



Source: Fishermans Bend URA Business Intentions Survey

Table 6.8: Main finance-related barriers to exporting

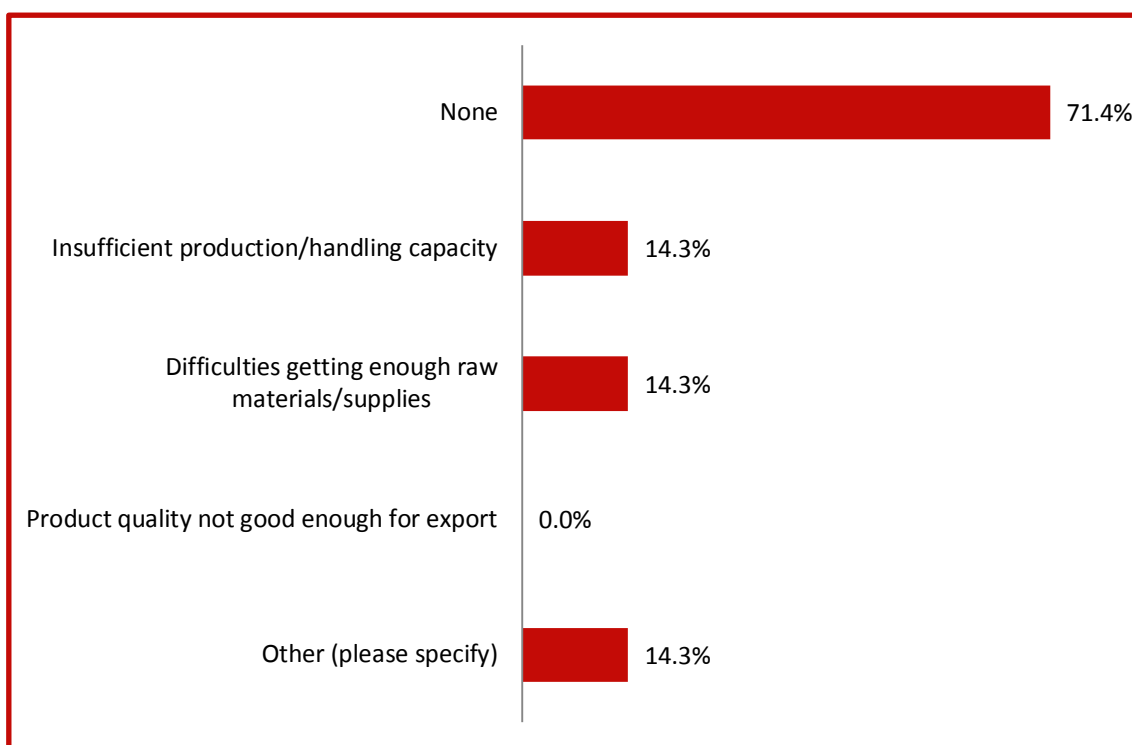
Answer Options	Response Share	Response Count
Availability of working capital	42.9%	3
Cost of finance	28.6%	2
Currency risk	14.3%	1
None	57.1%	4
Other (please specify)	0.0%	0
Answered question		7
Skipped question		9

Source: Fishermans Bend URA Business Intentions Survey

Question 9: What are the main production-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of businesses surveyed indicated they have not experienced any production-related barriers to exporting (71%), while a small share noted insufficient production/handling capacity (14%), and the difficulty in getting enough raw materials and supplies as production-related barriers (14%).

Figure 6.12: Production-related barriers to exporting (multi-response)



Source: Fishermans Bend URA Business Intentions Survey

Table 6.9: Production-related barriers to exporting (multi-response)

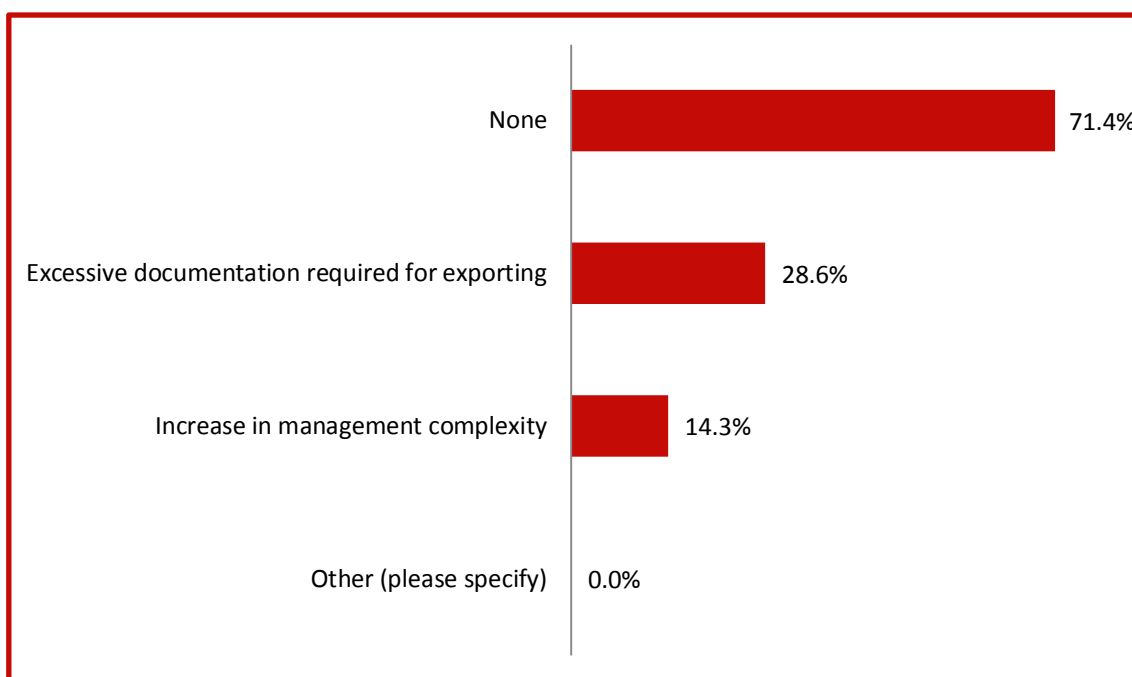
Answer Options	Response Share	Response Count
Insufficient production/handling capacity	14.3%	1
Difficulties getting enough raw materials/supplies	14.3%	1
Product quality not good enough for export	0.0%	0
None	71.4%	5
Other (please specify)	14.3%	1
• Attracting appropriate senior staff		
Answered question		7
Skipped question		9

Source: Fishermans Bend URA Business Intentions Survey

Question 10: What are the main logistics-related barriers to exporting that face your business? :

The survey allowed respondents to select more than one answer. Almost one-in-three businesses noted the main logistics-related barriers to exporting are the excessive documentation required (29%), while a smaller share (14%) noted the increase in management complexity. However, the majority of businesses (71%) indicated they have not experienced any logistics-related barriers to exporting.

Figure 6.13: Logistics-related barrier to exporting (multi-response)



Source: Fishermans Bend URA Business Intentions Survey

Table 6.10: Logistics-related barrier to exporting (multi-response)

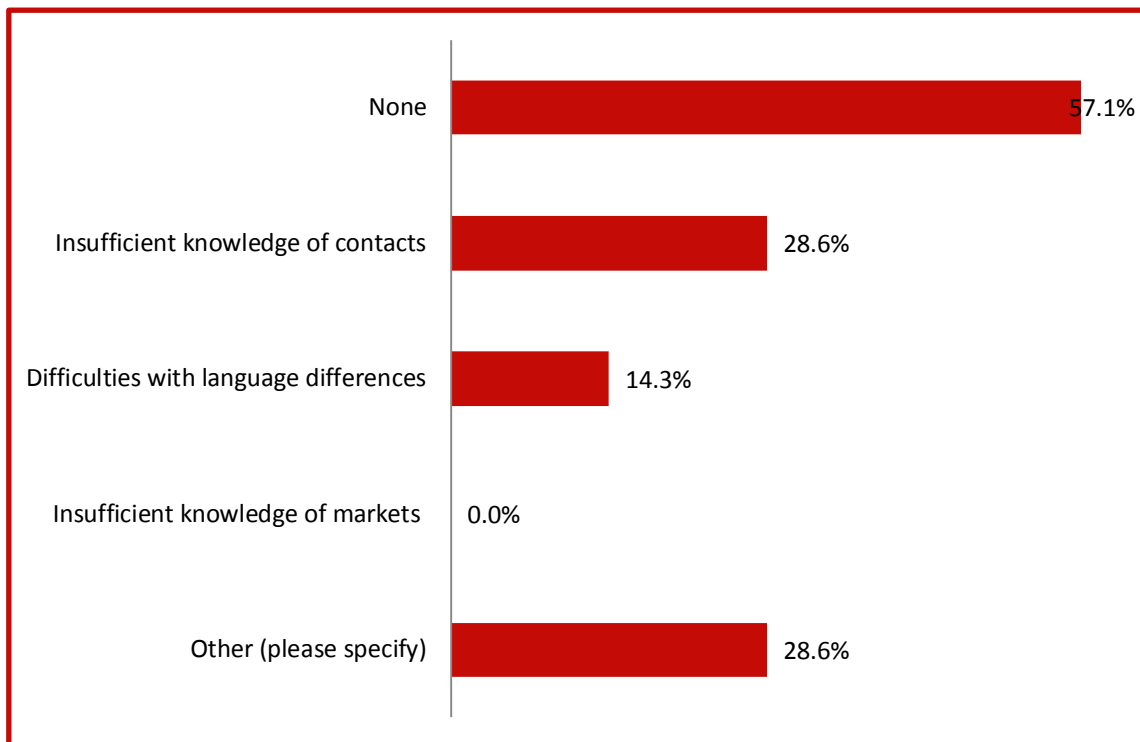
Answer Options	Response Share	Response Count
Excessive documentation required for exporting	28.6%	2
Increase in management complexity	14.3%	1
None	71.4%	5
Other (please specify)	0.0%	0
Answered question		7
Skipped question		9

Source: Fishermans Bend URA Business Intentions Survey

Question 11: What are the main market-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents noted that they have not experienced any market-related barriers to exporting (57%), although some respondents noted insufficient knowledge of contacts (29%), and difficulties with language differences (14%).

Figure 6. 14: Market-related barriers to exporting (multi-response)



Source: Fishermans Bend URA Business Intentions Survey

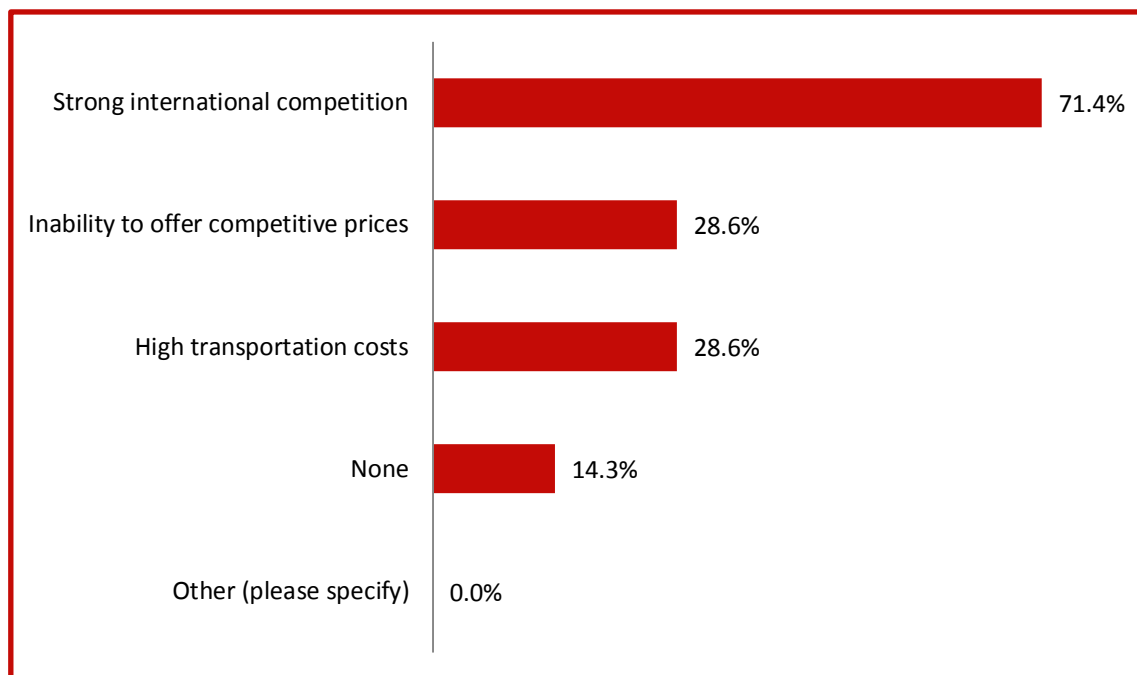
Table 6.11: Market-related barriers to exporting (multi-response)

Answer Options	Response Share	Response Count
Insufficient knowledge of markets	0.0%	0
Insufficient knowledge of contacts	28.6%	2
Difficulties with language differences	14.3%	1
None	57.1%	4
Other (please specify)		
<ul style="list-style-type: none"> Department of defence new IP rules Medical regulatory processes are slow and a barrier that takes time to navigate 	28.6%	2
Answered question		7
Skipped question		9

Source: Fishermans Bend URA Business Intentions Survey

Question 12: What are the main competition-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents noted the main competition-related barriers to exporting are strong international competition (71%), while other factors include the inability to offer competitive prices (29%), and high transportation costs (29%).

Figure 6.15: Competition-related barriers to exporting (multi-response)

Source: Fishermans Bend URA Business Intentions Survey

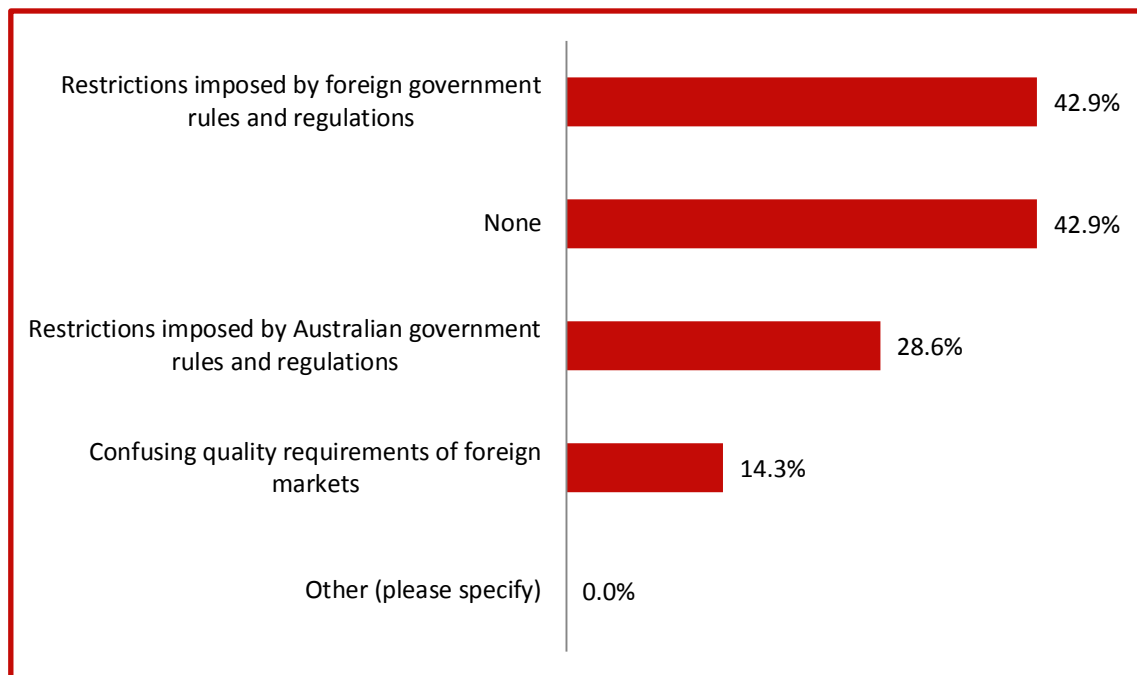
Table 6.12: Competition-related barriers to exporting (multi-response)

Answer Options	Response Share	Response Count
Strong international competition	71.4%	5
Inability to offer competitive prices	28.6%	2
High transportation costs	28.6%	2
None	14.3%	1
Other (please specify)	0.0%	0
Answered question		7
Skipped question		9

Source: Fishermans Bend URA Business Intentions Survey

Question 13: What are the main regulatory impediments to exporting that face your business?

The survey allowed respondents to select more than one answer. Almost one-half of all respondents noted the main regulatory impediments to exporting are restrictions imposed by foreign government rules and regulations (43%), and also noted restrictions imposed by Australian government rules and regulations (29%). However, a significant share of businesses (43%) indicated they have not experienced any market-related barriers to exporting.

Figure 6.16: Regulatory impediments to exporting (multi-response)

Source: Fishermans Bend URA Business Intentions Survey

Table 6.13: Regulatory impediments to exporting (multi-response)

Answer Options	Response Share	Response Count
Restrictions imposed by foreign government rules and regulations	42.9%	3
Confusing quality requirements of foreign markets	14.3%	1
Restrictions imposed by Australian government rules and regulations	28.6%	2
None	42.9%	3
Other (please specify)	0.0%	0
Answered question		7
Skipped question		9

Source: Fishermans Bend URA Business Intentions Survey

Question 14: Are there any other barriers to exporting that face your business e.g. human resources-related?

The majority of businesses surveyed skipped this question. The few that responded indicated no other barriers to exporting, except for one who noted an increased cost of personnel due to escalating salary pressures.

Table 6.14: Other barriers that face businesses

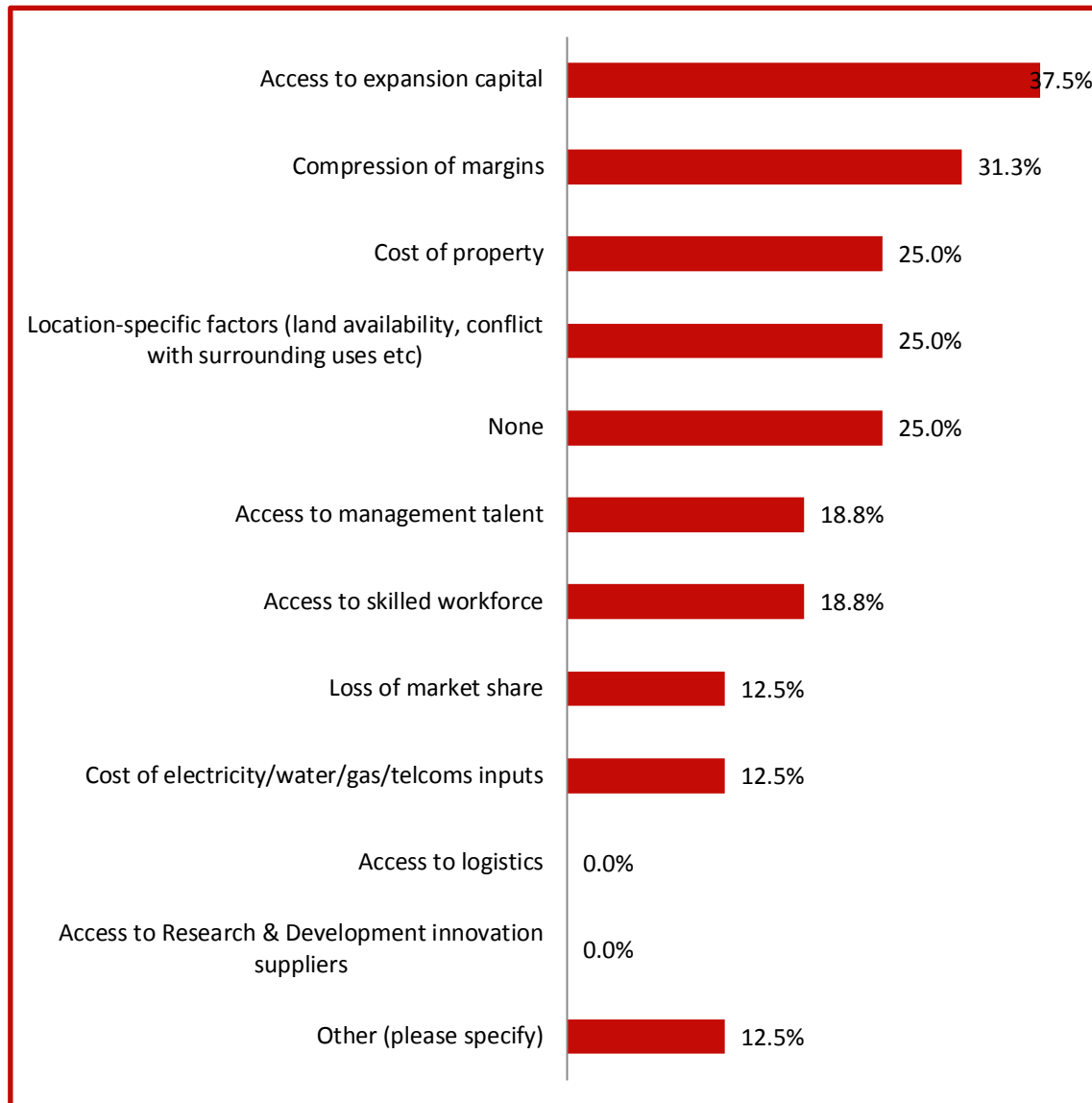
Number	Response Text
1	Increased cost of personnel due to escalating salary pressures
2	None
3	no

6.4 The Future of your Business

Question 15: What are the main barriers to potential expansion (if any)?

The survey allowed respondents to select more than one answer. Businesses surveyed identified the main barriers to potential expansion are related to access to expansion capital (38%), compression of margins (31%), cost of property (25%), and location-specific factors (25%). However, one-in-four of businesses (25%) noted no barriers to potential expansion.

Figure 6.17: Main barriers to potential expansion (multi-response)



Source: Fishermans Bend URA Business Intentions Survey

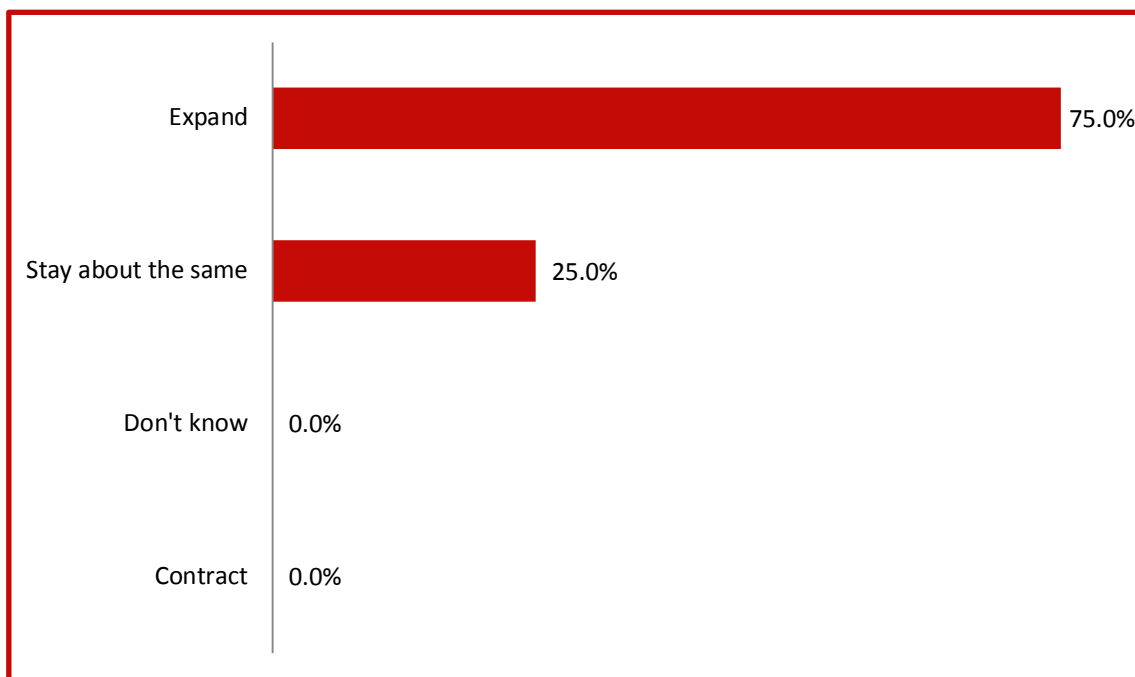
Table 6.15: Main barriers to potential expansion (multi-response)

Answer Options	Response Share	Response Count
Access to expansion capital	37.5%	6
Loss of market share	12.5%	2
Compression of margins	31.3%	5
Access to management talent	18.8%	3
Access to skilled workforce	18.8%	3
Access to logistics	0.0%	0
Access to Research & Development innovation suppliers	0.0%	0
Cost of electricity/water/gas/telecoms inputs	12.5%	2
Cost of property	25.0%	4
Location-specific factors (land availability, conflict with surrounding uses etc)	25.0%	4
None	25.0%	4
Other (please specify)		
<ul style="list-style-type: none"> Labour costs and govt charges Medical regulatory trained staff are very few in Melbourne Bigger talent pool in Sydney 	12.5%	2
Answered question		16
Skipped question		0

Source: Fishermans Bend URA Business Intentions Survey

Question 16: In the next 5 years do you anticipate that the number of employees on site will expand or contract?

The majority of businesses (75%) anticipate that the number of employees on-site will expand in the next 5 years, while others (25%) anticipate employment will remain about the same. Importantly, no businesses indicated they would be reducing employee numbers over the coming 5 years.

Figure 6.18: Number of employees on site in the next 5 years

Source: Fishermans Bend URA Business Intentions Survey

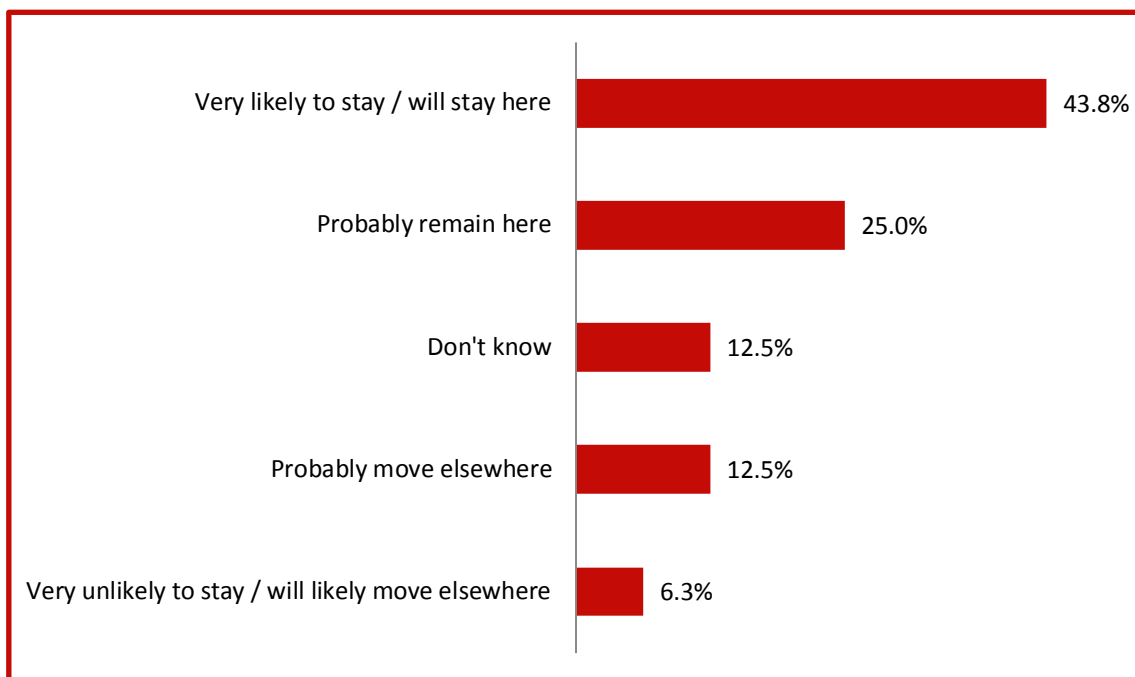
Table 6.16: Number of employees on site in the next 5 years

Answer Options	Response Share	Response Count
Expand	75.0%	12
Contract	0.0%	0
Stay about the same	25.0%	4
Don't know	0.0%	0
Answered question		16
Skipped question		0

Source: Fishermans Bend URA Business Intentions Survey

Question 17: How likely is your business to stay in its current location over the next 5 years?

The majority of respondents indicate they are “very likely” (44%) to stay at their current location or “probably remain” at the location (25%). Approximately one-in-five respondents indicate they will “probably move elsewhere” (12.5%) or will “likely move elsewhere” (6%).

Figure 6.19: Likelihood to stay in its current location over the next 5 years

Source: Fishermans Bend URA Business Intentions Survey

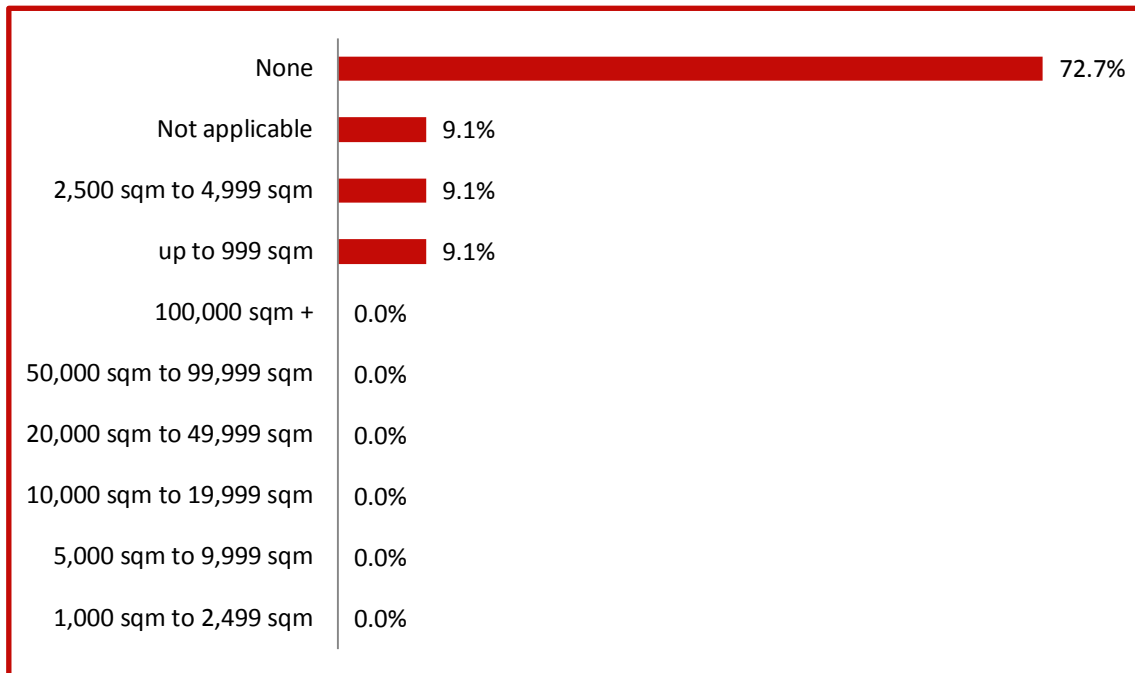
Table 6.17: Likelihood to stay in its current location over the next 5 years

Answer Options	Response Share	Response Count
Very likely to stay / will stay here	43.8%	7
Probably remain here	25.0%	4
Probably move elsewhere	12.5%	2
Very unlikely to stay / will likely move elsewhere	6.3%	1
Don't know	12.5%	2
Answered question		16
Skipped question		0

Source: Fishermans Bend URA Business Intentions Survey

Question 18: If your business is likely to stay in this location over the next 5 years, what additional land area will be required for expansion purposes?

The majority of respondents who indicated they are likely to stay in the current location over the coming 5 years will not require additional land for expansion purposes (73%). Other businesses generally require up to 9,999 m² of land (9.1%), or between 2,500m² to 4,999 m² of land (9.1%).

Figure 6.20: Additional land area required for expansion purposes

Source: Fishermans Bend URA Business Intentions Survey

Table 6.18: Additional land area required for expansion purposes

Answer Options	Response Share	Response Count
None	72.7%	8
up to 999 sqm	9.1%	1
1,000 sqm to 2,499 sqm	0.0%	0
2,500 sqm to 4,999 sqm	9.1%	1
5,000 sqm to 9,999 sqm	0.0%	0
10,000 sqm to 19,999 sqm	0.0%	0
20,000 sqm to 49,999 sqm	0.0%	0
50,000 sqm to 99,999 sqm	0.0%	0
100,000 sqm +	0.0%	0
Not applicable	9.1%	1
Answered question		11
Skipped question		5

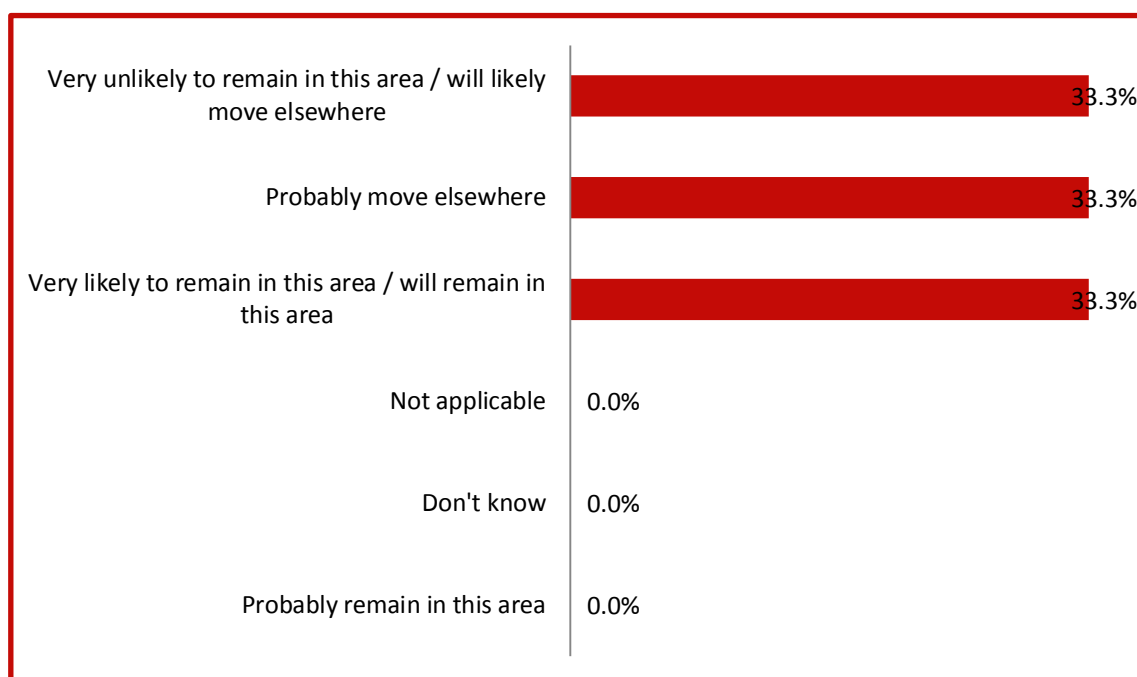
Source: Fishermans Bend URA Business Intentions Survey

6.5 Alternative Locations

Question 19: If your business was to move from its current location, how likely is the business to remain in the Fishermans Bend Urban Renewal Area?

The majority of businesses surveyed skipped this question, as they had previously indicated their business was unlikely to move. Of the three responses received, one business indicated they will probably remain in this area; another business indicated they will probably move elsewhere; and one business indicated they will very likely move elsewhere.

Figure 6.21: Likelihood of business to remain in the Fishermans Bend Urban Renewal Area



Source: Fishermans Bend URA Business Intentions Survey

Table 6.19: Likelihood of business to remain in the Fishermans Bend Urban Renewal Area.

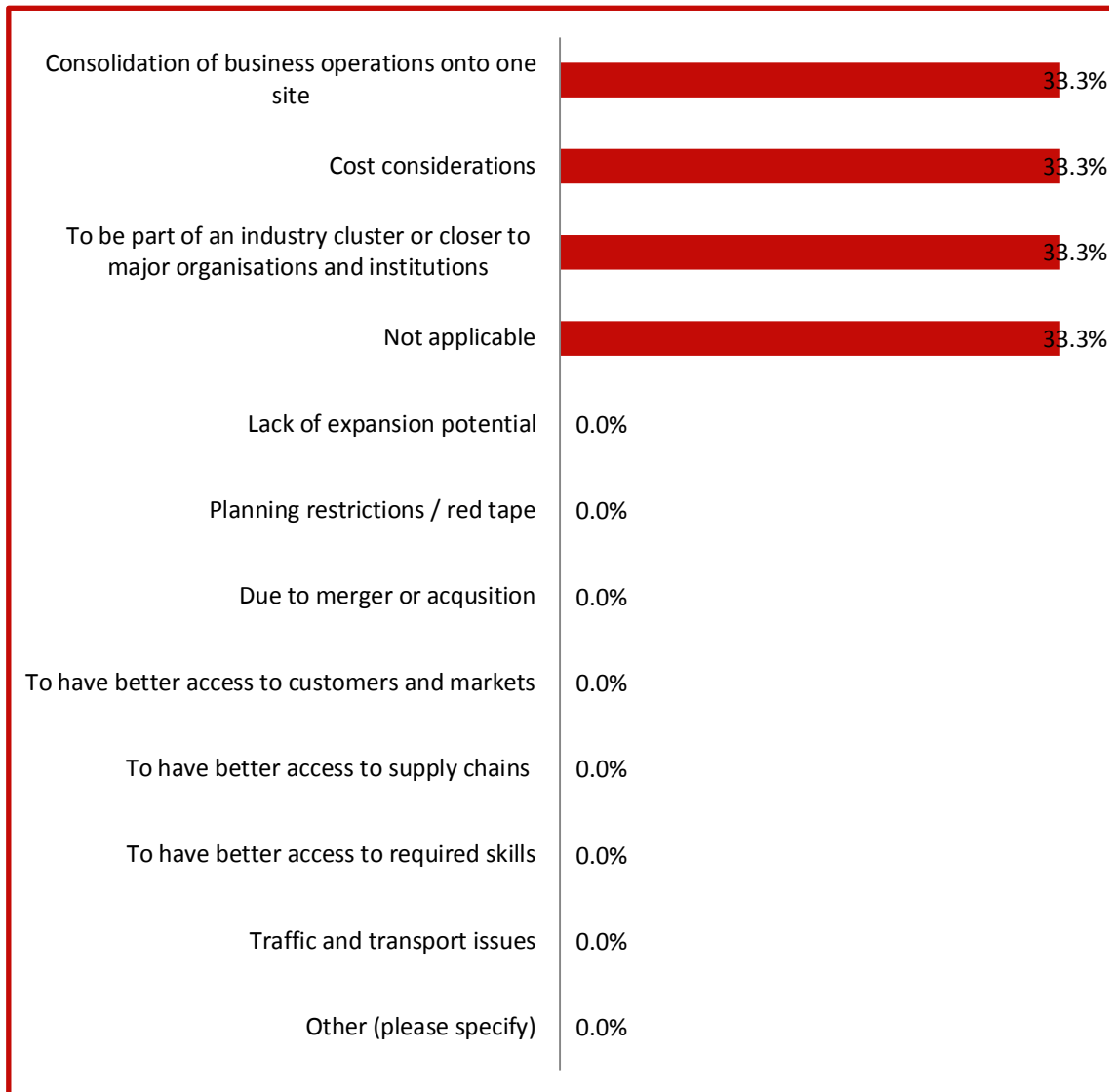
Answer Options	Response Share	Response Count
Very likely to remain in this area / will remain in this area	33.3%	1
Probably remain in this area	0.0%	0
Probably move elsewhere	33.3%	1
Very unlikely to remain in this area / will likely move elsewhere	33.3%	1
Don't know	0.0%	0
Not applicable	0.0%	0
Answered question		3
Skipped question		13

Source: Fishermans Bend URA Business Intentions Survey

Question 20: What would be your main reasons for moving out of the Fishermans Bend URA?

The survey allowed respondents to select more than one answer. Businesses surveyed indicated that the main reasons for moving out of Fishermans Bend URA are consolidation of business operations onto one site (33%), cost considerations (33%), and to be part of an industry cluster or closer to major organisations and institutions (33%).

Figure 6.22: Reasons for moving out of the Fishermans Bend Urban Renewal Area.



Source: Fishermans Bend URA Business Intentions Survey

Table 6.20: Reasons for moving out of the Fishermans Bend Urban Renewal Area (multi-response)

Answer Options	Response Share	Response Count
Consolidation of business operations onto one site	33.3%	1
Lack of expansion potential	0.0%	0
Cost considerations	33.3%	1
Planning restrictions / red tape	0.0%	0
Due to merger or acquisition	0.0%	0
To have better access to customers and markets	0.0%	0
To have better access to supply chains	0.0%	0
To have better access to required skills	0.0%	0
To be part of an industry cluster or closer to major organisations and institutions	33.3%	1
Traffic and transport issues	0.0%	0
Not applicable	33.3%	1
Other (please specify)	0.0%	0
Answered question		3
Skipped question		13

Source: Fishermans Bend URA Business Intentions Survey

Question 21: What alternative locations would you seriously consider for your business?

Businesses surveyed noted Essendon, Heidelberg Heights, Fairfield, and Bundoora as places to which businesses would seriously consider locating.

Table 6.21: Alternative locations businesses would consider (multi-response)

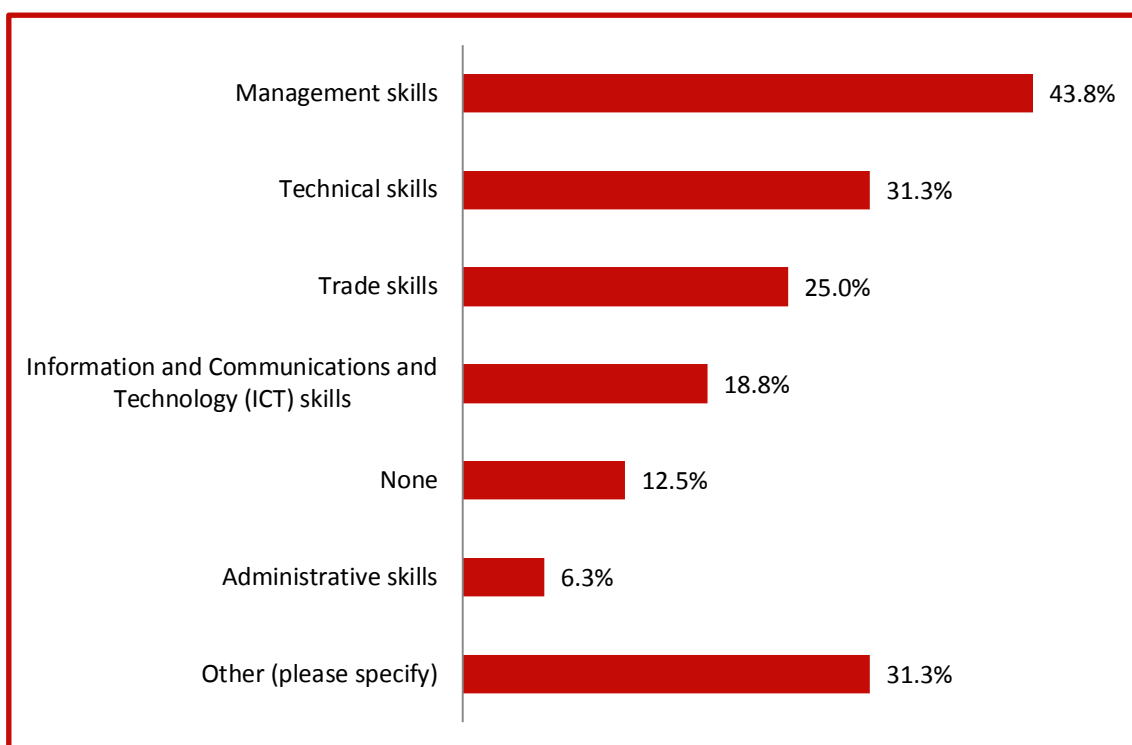
Number	Location:
1	Essendon
2	Heidelberg Heights
3	Fairfield
4	Bundoora
Answered question	4
Skipped question	41

Source: Fishermans Bend URA Business Intentions Survey

Question 22: Thinking about your workforce over the next 5 years, what particular skill shortages may affect your business and require upskilling?

The survey allowed respondents to select more than one answer. The main skills requirements for over the next 5 years are management skills (44%), technical skills (31%), trade skills (25%), and ICT skills (19%).

Figure 6.23: Skill shortages that may require up-skilling over the next 5 years (multi-response)



Source: Fishermans Bend URA Business Intentions Survey

Table 6.22: Skill shortages that may require upskilling over the next 5 years (multi-response)

Answer Options	Response Share	Response Count
Trade skills	25.0%	4
Technical skills	31.3%	5
Information and Communications and Technology (ICT) skills	18.8%	3
Administrative skills	6.3%	1
Management skills	43.8%	7
None	12.5%	2
Other (please specify)		
<ul style="list-style-type: none"> Lack of tourism education Specialised Engineering Managers Cost of labour and government charges Project management skills Business Consulting Skills 	31.3%	5
Answered question		16
Skipped question		0

Source: Fishermans Bend URA Business Intentions Survey

6.6 Impact of Infrastructure / Investment Initiatives

Question 23: To what extent would improved road infrastructure support your business and encourage you to stay in the precinct?

Of all businesses surveyed, 38% indicated that improved road infrastructure would “greatly increase” their intention to stay, while 31% indicated it would “moderately increase” their intention to stay, and 31% indicated it would have “no impact” on their intention to stay. In total, 69% of all respondents support improved road infrastructure to some extent.

Table 6.23: Impact of improved road infrastructure on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	6	5	5	1.94	16
Per cent	38%	31%	31%		
Answered question					16
Skipped question					0

Source: Fishermans Bend URA Business Intentions Survey

Question 24: To what extent would improved public transport infrastructure support your business and encourage you to stay in the precinct?

Most businesses surveyed (63%) indicated that improved public transport infrastructure would “greatly increase” their intention to stay, while 25% indicated it would “moderately increase” their intention to stay, and 12% indicated it would have “no impact” on their intention to stay. In total, almost 9 in 10 respondents support improved public transport to some extent.

Table 6.24: Impact of improved public transport infrastructure on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	10	4	2	1.50	16
Per cent	63%	25%	12%		
Answered question					16
Skipped question					0

Source: Fishermans Bend URA Business Intentions Survey

Question 25: To what extent would improved broadband (e.g. access to the National Broadband Network) support your business and encourage you to stay in the precinct?

A total of 69% of respondents indicated that improved broadband would “greatly increase” their intention to stay (31%) or “moderately increase” their intention to stay (38%), with 31% indicating it would have no impact on their intention to stay.

Table 6.25: Impact of improved broadband on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	5	6	5	2.00	16
Per cent	31%	38%	31%		
Answered question					16
Skipped question					0

Source: Fishermans Bend URA Business Intentions Survey

Question 26: To what extent would improved utilities infrastructure (e.g. gas, electricity, water, sewerage) support your business and encourage you to stay in the precinct?

The majority of respondents (69%) indicate that improved utilities would have “no impact” on their decision to stay in Fishermans Bend, although 25% say it would “moderately increase” their intention to stay and 6% say it would “greatly increase” their intention to stay.

Table 6.26: Impact of improved utilities infrastructure on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	1	4	11	2.63	16
Per cent	6%	25%	69%		
Answered question					16
Skipped question					0

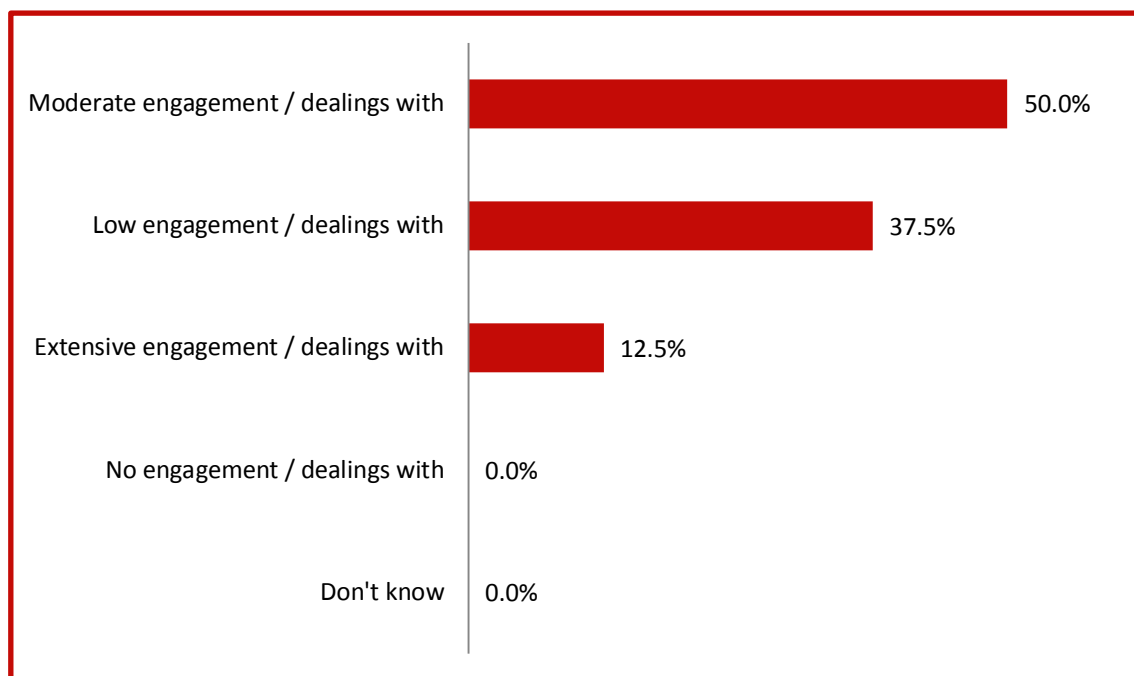
Source: Fishermans Bend URA Business Intentions Survey

6.7 Building Relationships

Question 27: How would you rate the extent of relationships your business has with other businesses, services or institutions in the precinct?

Almost two-thirds of respondents indicated an “extensive” level of engagement (13%) or a “moderate” level of engagement (50%) with other businesses services or institutions, while a smaller share (38%) indicated only a “low” level of engagement.

Figure 6.24: Extent of relationships the business has with other businesses, services or institutions in the precinct.



Source: Fishermans Bend URA Business Intentions Survey

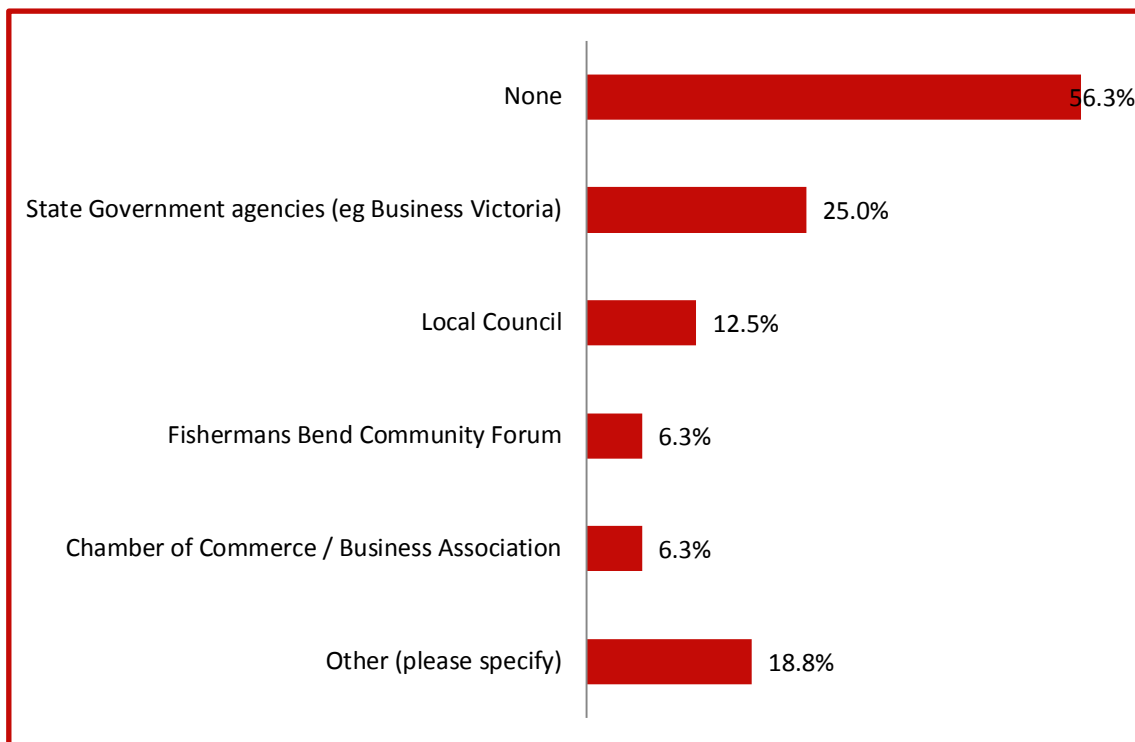
Table 6.27: Extent of relationships the business has with other businesses, services or institutions in the precinct.

Answer Options	Response Share	Response Count
Extensive engagement / dealings with	12.5%	2
Moderate engagement / dealings with	50.0%	8
Low engagement / dealings with	37.5%	6
No engagement / dealings with	0.0%	0
Don't know	0.0%	0
Answered question		16
Skipped question		0

Source: Fishermans Bend URA Business Intentions Survey

Question 28: Which are the main businesses or institutions in the precinct that your business currently engages or collaborates with?

The survey allowed respondents to select more than one answer. Most businesses (56%) indicated they do not collaborate or engage with any other business or institution in the precinct. Those that do engage mentioned the State Government of Victoria (25%) and the local council (13%).

Figure 6.25: Main businesses or institutions that the business is currently engaging or collaborating with.

Source: Fishermans Bend URA Business Intentions Survey

Table 6.28: Main businesses or institutions that the business is currently engaging or collaborating with.

Answer Options	Response Share	Response Count
Local Council	12.5%	2
State Government agencies (e.g. Business Victoria)	25.0%	4
Fishermans Bend Community Forum	6.3%	1
Chamber of Commerce / Business Association	6.3%	1
None	56.3%	9
Other (please specify)	18.8%	3
• DST Group		
• a few suppliers are located close by		
• Fed Govt Agencies - AusIndustry; Dept of Defence		
Answered question		16
Skipped question		0

Source: Fishermans Bend URA Business Intentions Survey

Question 29: What else, if anything, would make the precinct a more attractive location for your business in the future?

The challenges that businesses would like to overcome relate to road infrastructure and accessibility issues, cost of land, and support to industry.

Table 6.2921: Challenges that businesses would like to overcome

Respondent Number	Response Text	
1	Industry support and clustering initiatives close by	
2	Government funding to grow our innovation R&D lab	
3	Tram access!!	
4	improved public transport, especially a train station	
5	Costs of land	
6	Some improved landscaping and public transport. Make some outdoor lunch areas/ parks/ benches etc	
7	Road Congestion on the Bridges and Freeways has a HUGE negative impact on accessibility to and from Port Melbourne. Last accidents on the bridge, caused me to take 1 hour to go from Plummer Street to corner Queen street and Albert Road, due to gridlock. That was at 5pm on home-bound journey to Camberwell	
8	Road infrastructure and parking in Bay Street Port Melbourne for lunch trips	
Answered question		8
Skipped question		8

Source: Fishermans Bend URA Business Intentions Survey

6.8 Conclusions

1. Businesses chose to locate in the Fishermans Bend URA principally due to the precinct's accessibility to customers and markets (25%) and proximity to business clusters, organisations and institutions (25%).
2. Limitations or drawbacks of the location are lack of public transport (50%) and distance from where staff live (38%).
3. No businesses identified the precinct as having a poor reputation, with occupancy costs regarded by 50% of respondents the main limitation of doing business in the Fishermans Bend URA.
4. Approximately one-third of businesses surveyed in the Fishermans Bend URA (31%) are involved in exporting. However, the majority of businesses surveyed were not interested in exporting (56%). Businesses interested in exporting note the main barrier to exporting is related to the high level of competition internationally.
5. Access to expansion capital (38%) is the main barrier to expansion for businesses located in the Fishermans Bend URA.
6. A total of 33% of businesses are very likely/ will remain in the Fishermans Bend URA over the next 5 years.

7. Improved public transport would greatly increase the intention to stay in the precinct for 63% of the Fishermans Bend URA businesses surveyed.
8. Management skills (44%) and technical skills (31%) are the main upskilling requirements over the next 5 years for Fishermans Bend URA businesses..
9. The majority of Fishermans Bend URA businesses have low to moderate levels of engagement (77% combined) with other businesses, services or institutions in the precinct.

7 LA TROBE NEC – SURVEY FINDINGS

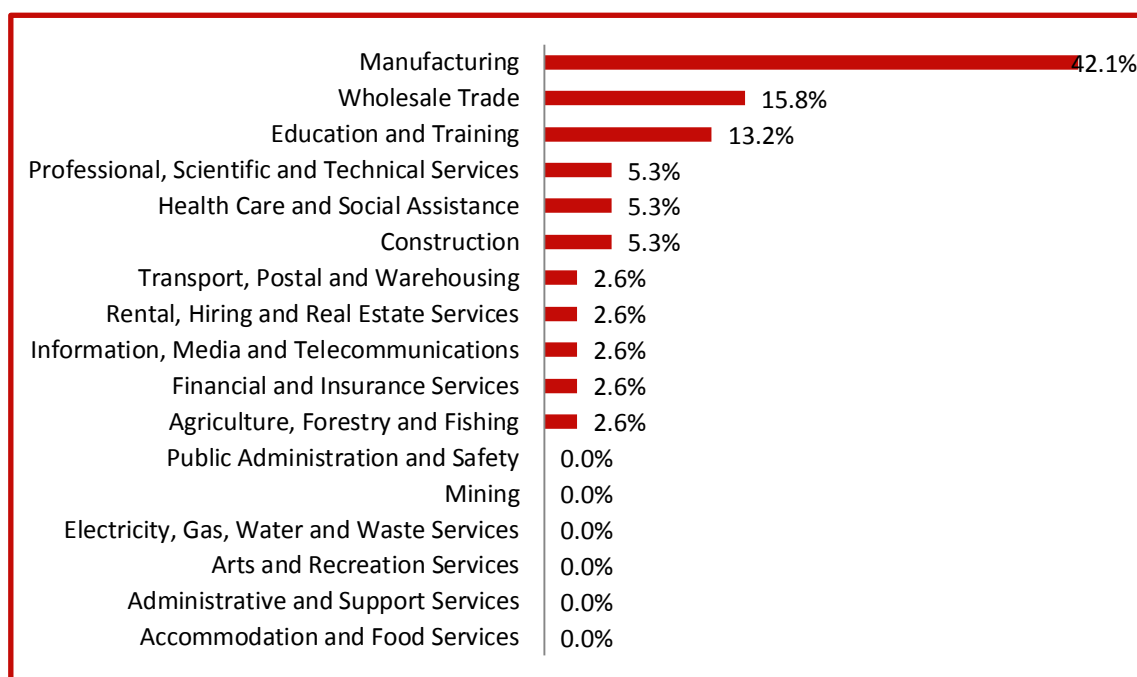
7.1 Introduction

The online business intentions survey was distributed to 147 businesses in the La Trobe NEC, with a total of 45 responses received. This represents a response rate of approximately 31%.

Most business respondents were associated the manufacturing industry (42%), followed by in wholesale trade businesses (16%), education and training organisations (13%), professional, scientific and technical services (5%), health care and social assistance (5%), and construction businesses (5%).

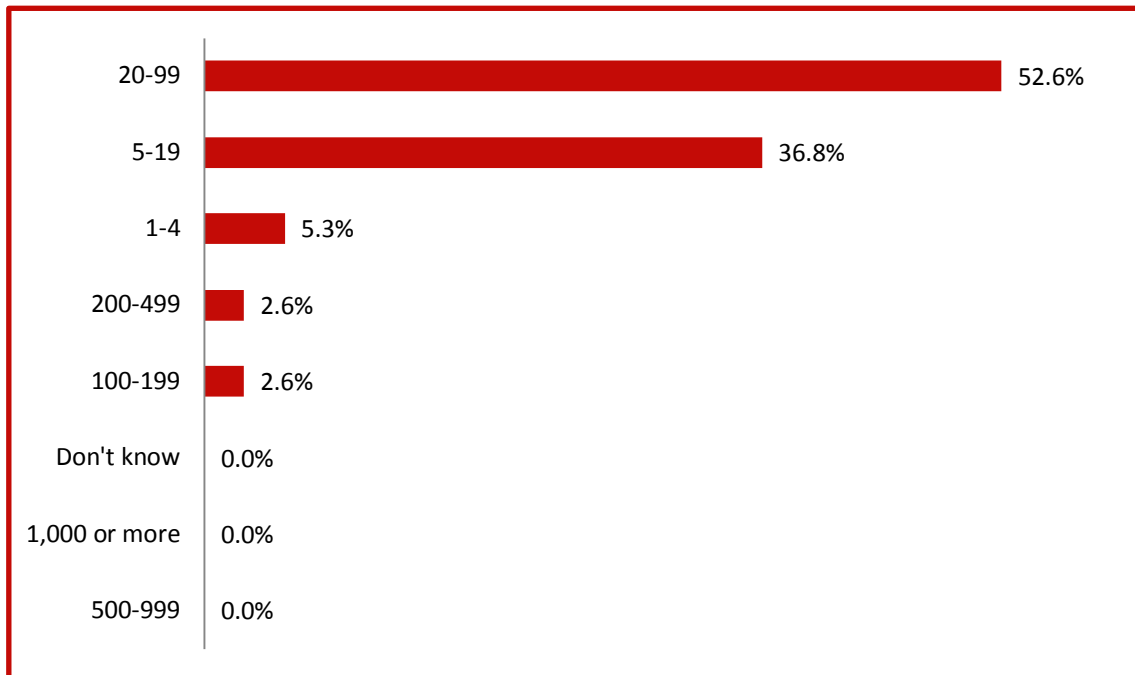
A significant majority of respondents were small to medium-sized businesses, with 5-99 employees on site (90%). The remainder of business respondents comprised micro-businesses with 1-4 employees on site (5%), large businesses with 100-199 employees on-site (3%), and major businesses with 200-499 employees on-site (3%).

Figure 7.1: Core area of business undertaken at the site



Source: La Trobe NEC Business Intentions Survey

Figure 7.2: Number of employees that work from the site



Source: La Trobe NEC Business Intentions Survey

Figure 7.3 outlines the boundaries of the La Trobe NEC study area, while sections 7.2 to 7.8 provide a summary of survey results.

Figure 7.3: La Trobe National Employment Cluster – Precinct Location



Source: Metropolitan Planning Authority

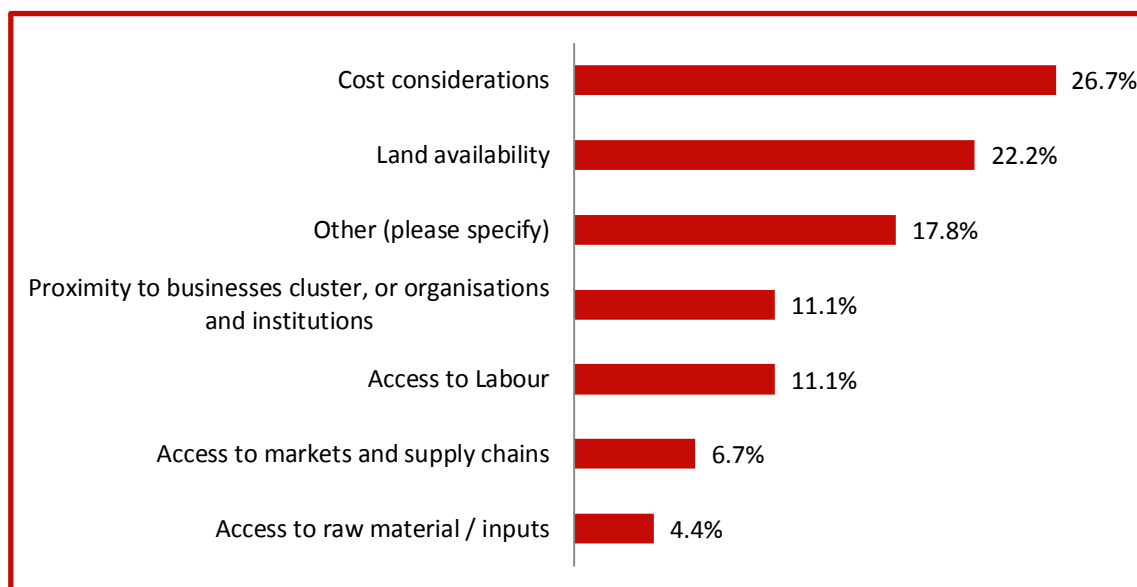
7.2 Choosing the Best Location

Question 1: What was the primary reason for your business moving to its current location

The online survey explored reasons to explain why businesses chose to locate in La Trobe NEC. The most frequent responses were as follows:

A total of 27% of businesses surveyed were influenced by cost considerations, 22% were influenced by land availability, 11% were influenced by the location's proximity to business cluster, organisations and institutions, and 11% were influenced by access to labour.

Figure 7.4: Primary reason for the business moving to its current location



Source: La Trobe NEC Business Intentions Survey

Table 7.1: Primary reason for the business moving to its current location

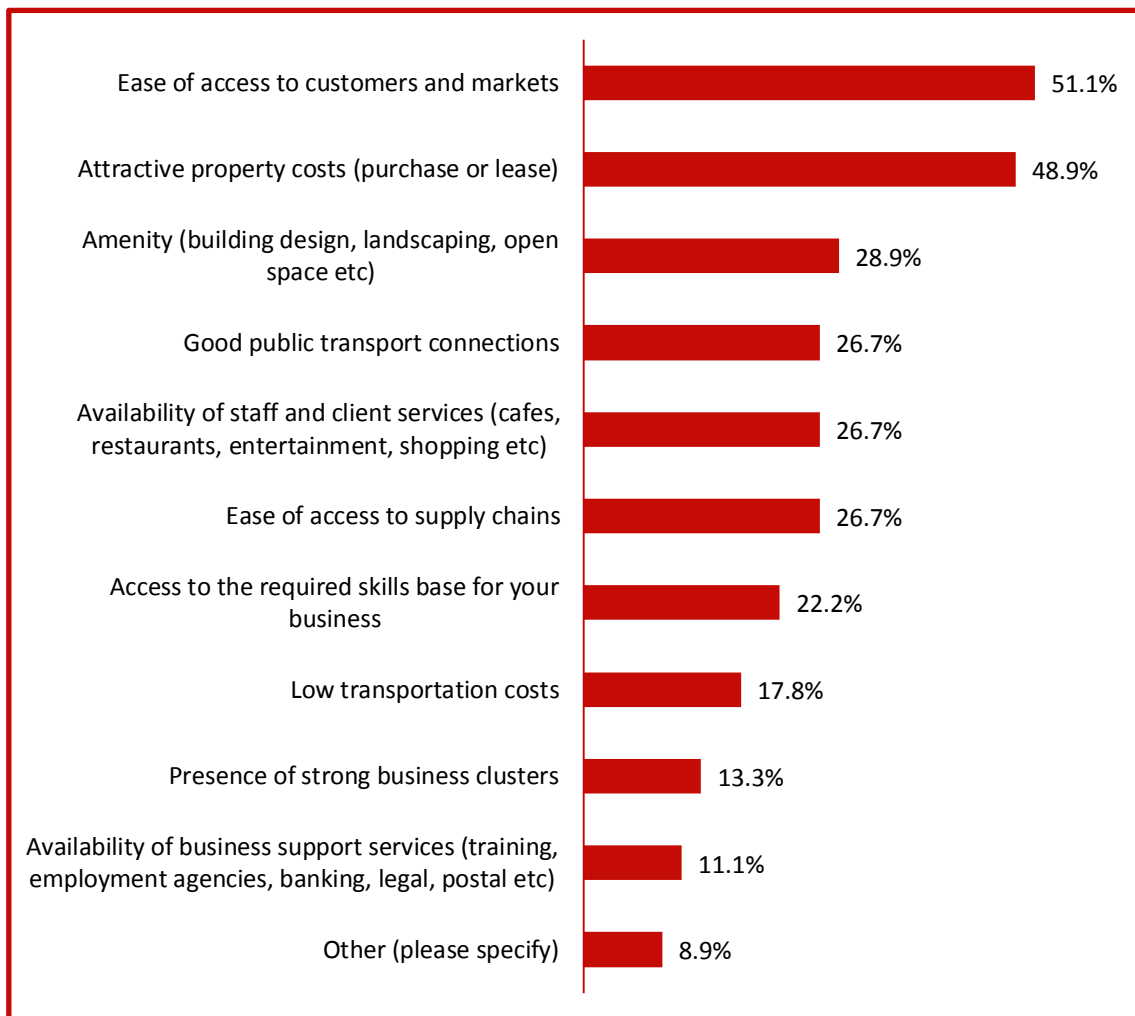
Answer Options	Response Share	Response Count
Land availability	22.2%	10
Cost considerations	26.7%	12
Access to markets and supply chains	6.7%	3
Access to raw material / inputs	4.4%	2
Access to Labour	11.1%	5
Proximity to businesses cluster, or organisations and institutions	11.1%	5
Other (please specify)		
<ul style="list-style-type: none"> • Appropriate building and facility • Existing premises still on rent • Super Fund – residential address • Availability of office space which was not an option in our previous location • Next to Austin Hospital • Key Stakeholder • Historical, Been there for 30+ years 	17.8%	8
Answered question		45
Skipped question		0

Source: La Trobe NEC Business Intentions Survey

Question 2: What are the key benefits or strengths of the current location of your premises?

Businesses surveyed indicated the key benefits or strengths of La Trobe NEC relate to the location's ease of access to customers and markets (51%), attractive property costs (49%), and amenity (29%).

Figure 7.5: Key benefits or strengths of the current location



Source: La Trobe NEC Business Intentions Survey

Table 7.2: Key benefits or strengths of the current location

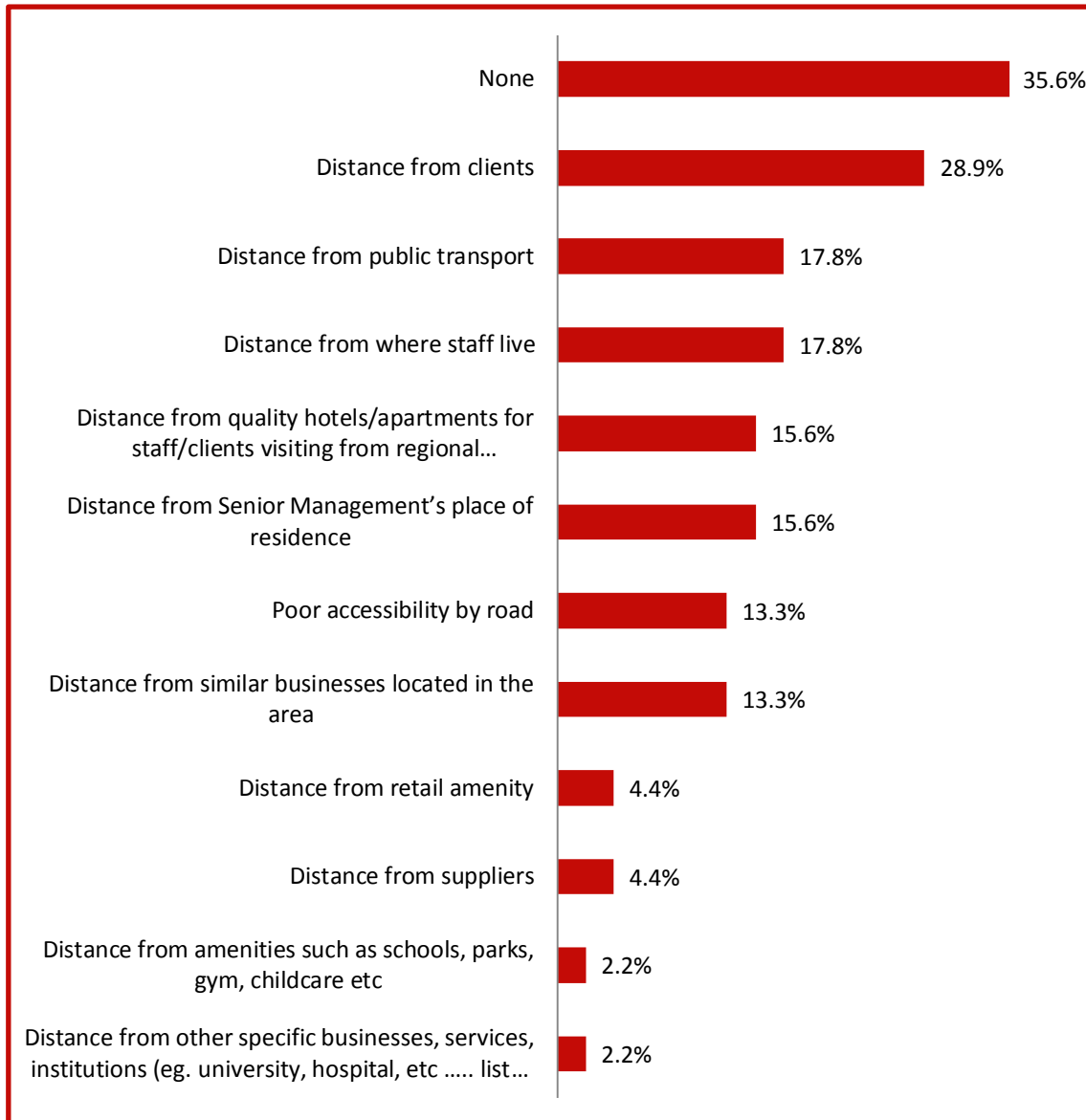
Answer Options	Response Share	Response Count
Attractive property costs (purchase or lease)	48.9%	22
Ease of access to customers and markets	51.1%	23
Ease of access to supply chains	26.7%	12
Availability of business support services (training, employment agencies, banking, legal, postal etc)	11.1%	5
Availability of staff and client services (cafes, restaurants, entertainment, shopping etc)	26.7%	12
Presence of strong business clusters	13.3%	6
Access to the required skills base for your business	22.2%	10
Low transportation costs	17.8%	8
Amenity (building design, landscaping, open space etc)	28.9%	13
Good public transport connections	26.7%	12
Other (please specify)		
<ul style="list-style-type: none"> We have been here for five years now. High street is a great busy strip Located in area which is central to our disabled employees Irrelevant – just a mailing address Own the land 	8.9%	4
Answered question		45
Skipped question		0

Source: La Trobe NEC Business Intentions Survey

Question 3: What do you think are the main locational limitations or drawbacks of your current location? Please select as many as apply from the following list:

Businesses surveyed indicated that the main limitations or drawbacks at La Trobe NEC relate to the location's distance from clients (29%), distance from public transport (18%), and distance from where staff live (18%). However, 36% did not note any locational limitations or drawbacks of the current location.

Figure 7.6: Main locational limitations or drawbacks of the current location (multi-response)



Source: La Trobe NEC Business Intentions Survey

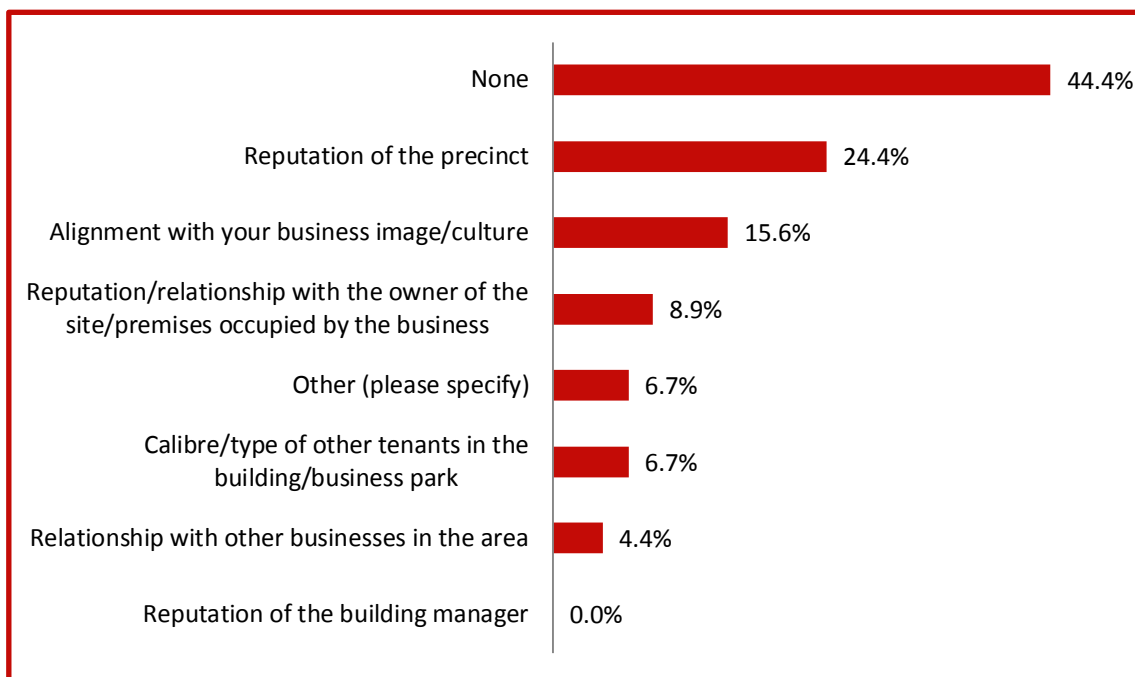
Table 7.3: Main locational limitations or drawbacks of the current location (multi-response)

Answer Options	Response Share	Response Count
Distance from clients	28.9%	13
Distance from suppliers	4.4%	2
Distance from similar businesses located in the area	13.3%	6
Distance from where staff live	17.8%	8
Distance from Senior Management's place of residence	15.6%	7
Distance from public transport	17.8%	8
Distance from other specific businesses, services, institutions (e.g.. university, hospital, etc list any that are relevant)	2.2%	1
Poor accessibility by road	13.3%	6
Distance from retail amenity	4.4%	2
Distance from amenities such as schools, parks, gym, childcare etc	2.2%	1
Distance from quality hotels/apartments for staff/clients visiting from regional Victoria/Interstate/Overseas	15.6%	7
None	35.6%	16
Other (please specify)		
<ul style="list-style-type: none"> No gas on site. No fibre optics ie on ADSL. Road network - we need ring road completion Difficult to attract quality staff to the area Accessibility for freight carriers Motor Vehicle Traffic in the mornings and at night There is insufficient street car parking in area The reputation of West Heidelberg means some clients are unwilling to come to our office. Availability of quality office accommodation as we grow. Lack of decent internet Very poor internet service (reliability and speed) Property costs; road congestion; lack of parking Lack of suitable labour Reasonable internet availability ADSL 1 only available & no gas in the street. 		14
Answered question		45
Skipped question		0

Source: La Trobe NEC Business Intentions Survey

Question 4: What do you think are the main image/reputation/relationship limitations or drawbacks of your current location?

Businesses surveyed indicated the main limitations relating to La Trobe NEC are the location's reputation (24%), and image/culture (16%). However, 44% of businesses surveyed did not note any image/reputation/relationship limitations at La Trobe.

Figure 7.7: Main image/reputation/relationship limitations of the current location

Source: La Trobe NEC Business Intentions Survey

Table 7.4: Main image/reputation/relationship limitations of the current location

Answer Options	Response Share	Response Count
Reputation/relationship with the owner of the site/premises occupied by the business	8.9%	4
Reputation of the building manager	0.0%	0
Alignment with your business image/culture	15.6%	7
Calibre/type of other tenants in the building/business park	6.7%	3
Reputation of the precinct	24.4%	11
Relationship with other businesses in the area	4.4%	2
None	44.4%	20
Other (please specify)	6.7%	3
• Long way for customers to travel to us. Not considered a premium location by our customers.		
• No real image limitations exist		
• Modern site with pathetic services (Internet & gas).		
Answered question		45
Skipped question		0

Source: La Trobe NEC Business Intentions Survey

Question 5: Are there any design/features of the site/building that are a drawback to your current location?

Business owners were asked to indicate any design features of the site or building that may be a limitation to their location. The majority of businesses noted the lack of parking for clients/customers (47%), the lack of parking for staff (47%), and lack of IT infrastructure (33%) as drawbacks to their current location.

Figure 7.8: Design/features of the site/building that are a drawback to the current location (multi-response)



Source: La Trobe NEC Business Intentions Survey

Table 7.5: Design/features of the site/building that are a drawback to the current location (multi-response)

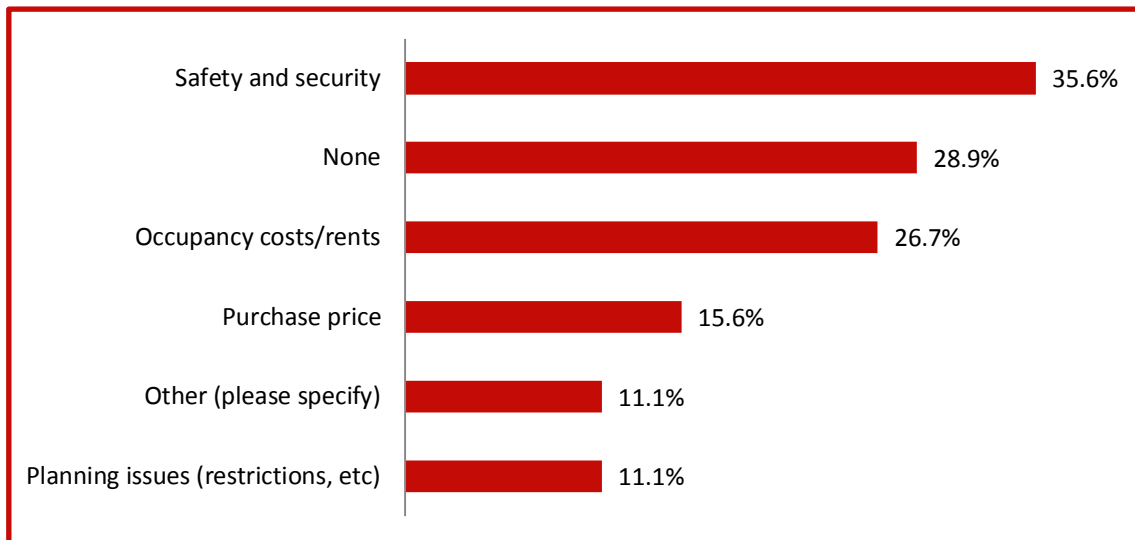
Answer Options	Response Share	Response Count
Size of site/premises	22.2%	10
Ability to have purpose-built premises	15.6%	7
Green rating/sustainability initiatives	8.9%	4
IT infrastructure	33.3%	15
Quality/style of fit-out	13.3%	6
Quality/style of building/accommodation	11.1%	5
Availability of parking for staff	46.7%	21
Availability of parking for clients/customers	46.7%	21
None	15.6%	7
Other (please specify)		
<ul style="list-style-type: none"> • Not enough power in the street. 90 amps per site is not good enough. • Broadband availability is completely miserable. • Rear parking for staff is not under cover and you have to walk down the road in all-weather to enter the building • Traffic Congestion in peak hour periods • narrow, one way roads make it difficult for supply trucks • Poor planning allows sites to be built as a warehouse but then tenanted as a factory. This should be covered on the future usage per the building permit. 	13.3%	6
Answered question		45
Skipped question		0

Source: La Trobe NEC Business Intentions Survey

Question 6: What are the main costs/other limitations or drawbacks of your current location?

The main limitations of the current location for businesses are related to safety and security issues (36%) and occupancy costs/rents (27%). However, 29% of businesses surveyed indicated they do not have any costs or other limitations at their current location.

Figure 7.9: Main costs/other limitations or drawbacks of the current location? (multi-response)



Source: La Trobe NEC Business Intentions Survey

Table 7.6: Main costs/other limitations or drawbacks of the current location? (multi-response)

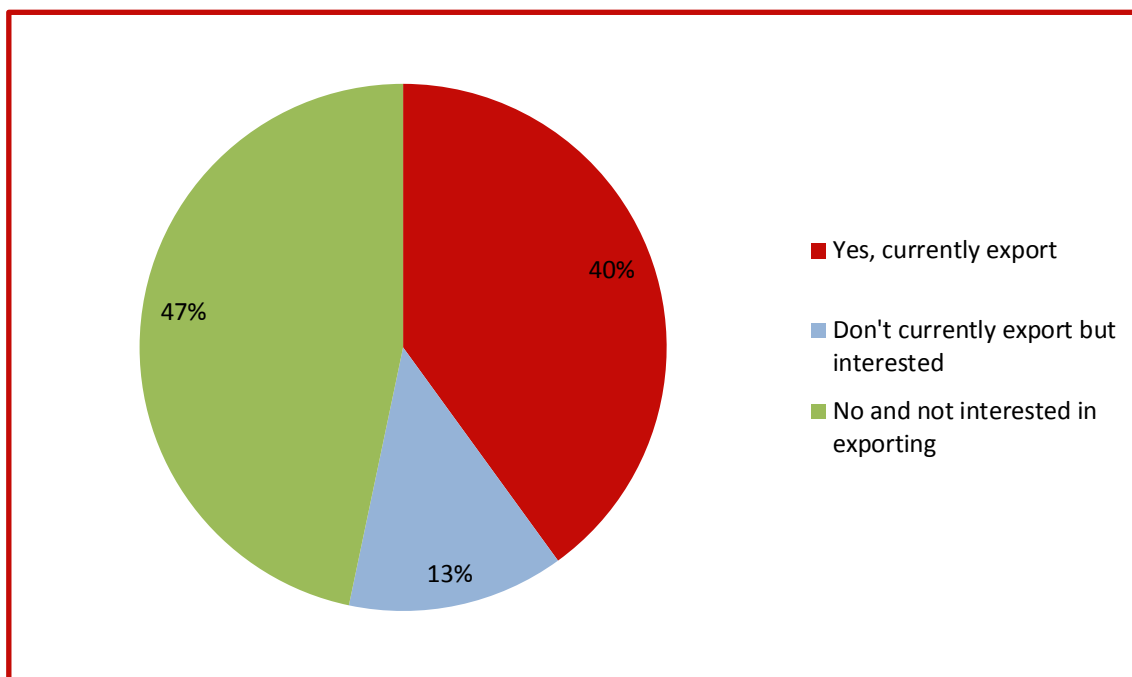
Answer Options	Response Per cent	Response Count
Occupancy costs/rents	26.7%	12
Purchase price	15.6%	7
Planning issues (restrictions, etc)	11.1%	5
Safety and security	35.6%	16
None	28.9%	13
Other (please specify)		
<ul style="list-style-type: none"> Putting in a transformer to increase power to the site. Believe rent is rather high due to the building being fitted out for vehicle show room that we do not use Traffic Congestion and limited route options to our workplace poor internet availability No subdivision should be allowed without gas to the site. 	11.1%	5
Answered question		45
Skipped question		0

Source: La Trobe NEC Business Intentions Survey

7.3 Exporting

Question 7: Does your business currently export goods or services overseas, or is your business interested in exporting?

The majority of businesses in the survey (53%) are either currently exporting overseas (40%), or are not currently exporting but are interested in exporting in the future (13%); 47% have no interest in exporting.

Figure 7.10: Businesses currently exporting goods and services overseas

Source: La Trobe NEC Business Intentions Survey

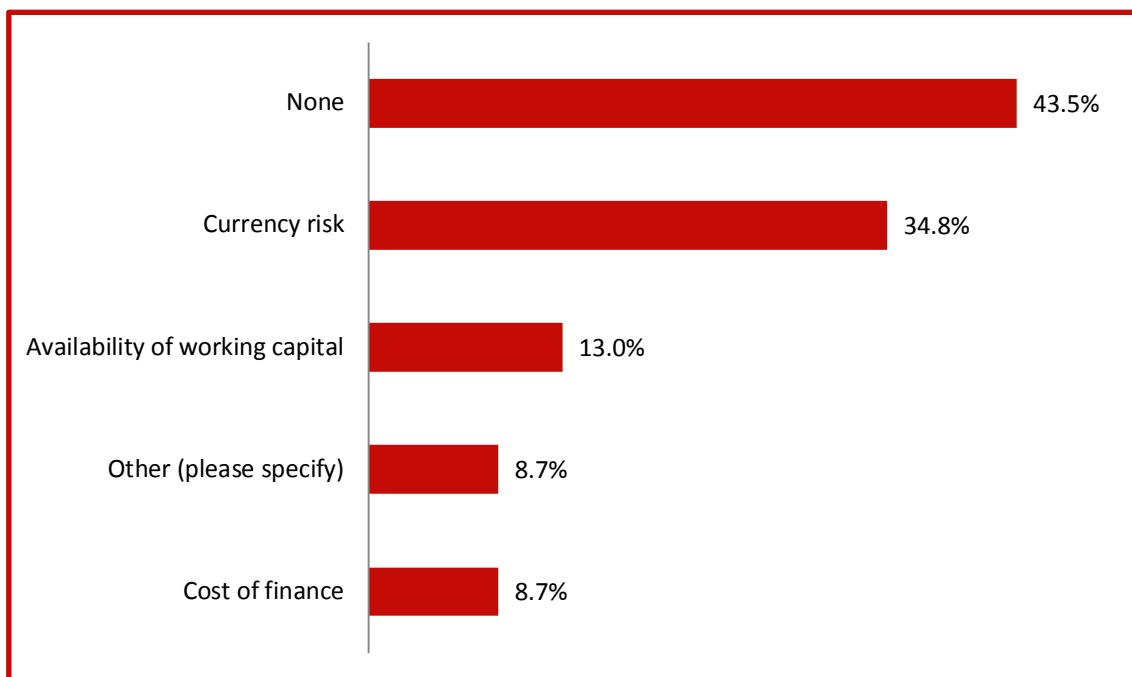
Table 7.7: Businesses currently exporting goods and services overseas

Answer Options	Response Share	Response Count
Yes, currently export	40.0%	18
Don't currently export but interested	13.3%	6
No and not interested in exporting	46.7%	21
Answered question		45
Skipped question		0

Source: La Trobe NEC Business Intentions Survey

Question 8: What are the main finance-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. A total of 43% did not note any finance-related barriers to exporting, while other respondents nominated currency risk (35%) and availability of working capital (13%) as the main financial barriers to exporting.

Figure 7.11: Main finance-related barriers to exporting (multi-response)

Source: La Trobe NEC Business Intentions Survey

Table 7.8: Main finance-related barriers to exporting (multi-response)

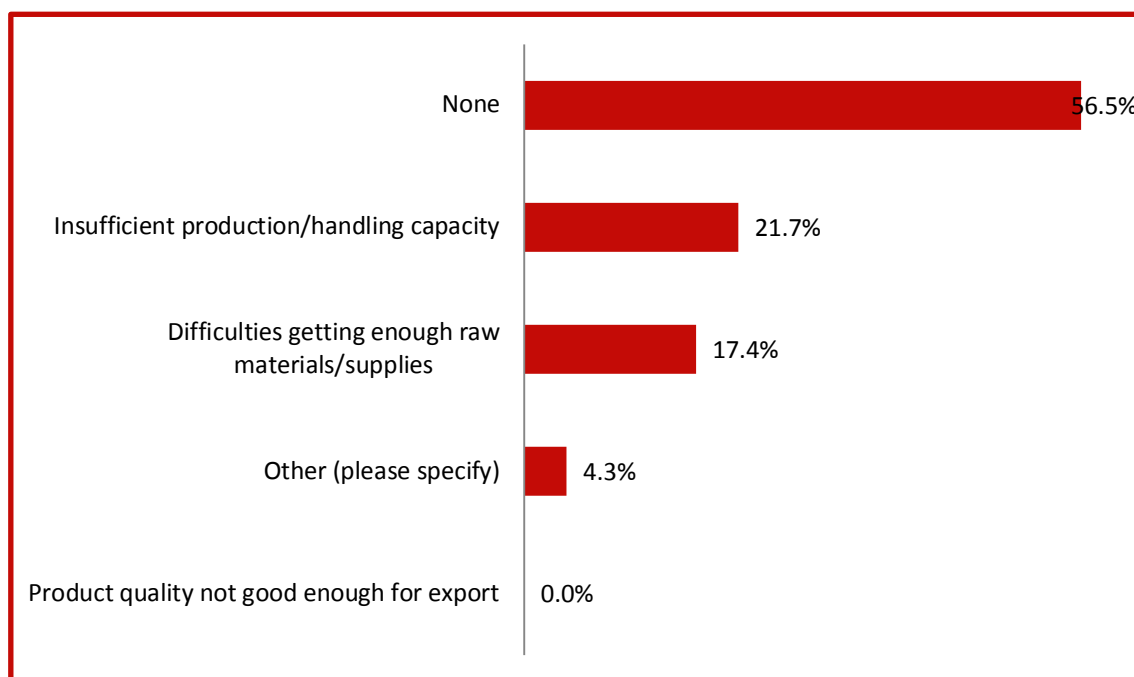
Answer Options	Response Share	Response Count
Availability of working capital	13.0%	3
Cost of finance	8.7%	2
Currency risk	34.8%	8
None	43.5%	10
Other (please specify)	8.7%	2
<ul style="list-style-type: none"> Foreign compliance costs Commercial Law in other countries viz South America. 		
Answered question		23
Skipped question		22

Source: La Trobe NEC Business Intentions Survey

Question 9: What are the main production-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of businesses surveyed (57%) indicated they have not experienced any production-related barriers to exporting. Other respondents mentioned insufficient production/handling capacity (22%) and difficulties getting enough raw materials/supplies (17%) as production-related barriers to exporting.

Figure 7.12: Production-related barriers to exporting (multi-response)



Source: La Trobe NEC Business Intentions Survey

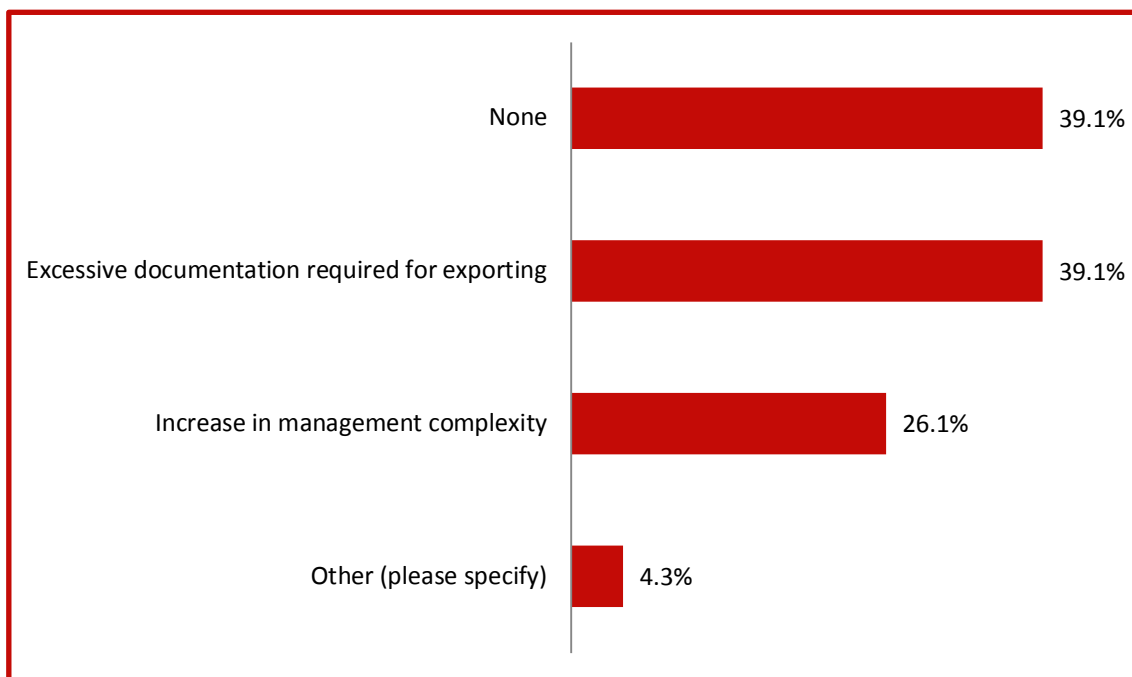
Table 7.9: Production-related barriers to exporting (multi-response)

Answer Options	Response Share	Response Count
Insufficient production/handling capacity	21.7%	5
Difficulties getting enough raw materials/supplies	17.4%	4
Product quality not good enough for export	0.0%	0
None	56.5%	13
Other (please specify)	4.3%	1
• Lack of skilled labour		
Answered question		23
Skipped question		22

Source: La Trobe NEC Business Intentions Survey

Question 10: What are the main logistics-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. Approximately four-in-ten respondents (39%) indicated they have not experienced any logistics-related barriers to exporting. Others noted the barriers are the excessive documentation required (39%), and the increase in management complexity (26%).

Figure 7.13: Logistics-related barriers to exporting (multi-response)

Source: La Trobe NEC Business Intentions Survey

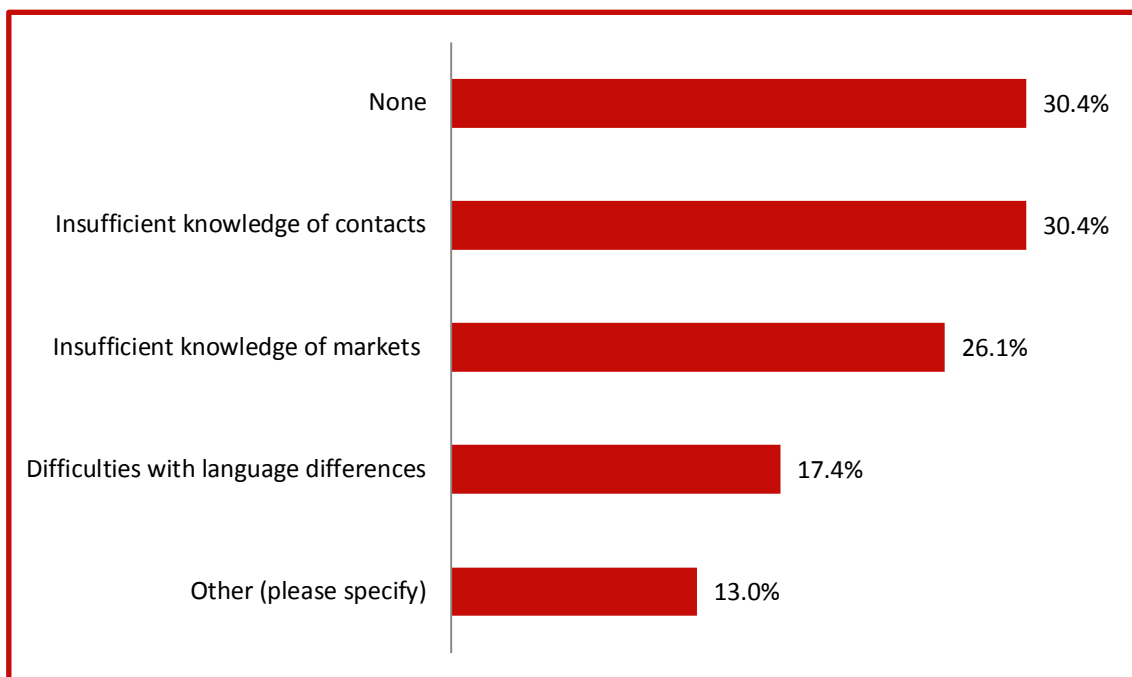
Table 7.10: Logistics-related barriers to exporting (multi-response)

Answer Options	Response Per cent	Response Count
Excessive documentation required for exporting	39.1%	9
Increase in management complexity	26.1%	6
None	39.1%	9
Other (please specify)	4.3%	1
• High cost of freight to NZ		
Answered question		23
Skipped question		22

Source: La Trobe NEC Business Intentions Survey

Question 11: What are the main market-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents noted that the main market-related barriers to exporting are an insufficient knowledge of contacts (30%), insufficient knowledge of markets (26%), and difficulties with language differences (17%). However, 30% of businesses surveyed indicated they have not experienced any market-related barriers to exporting.

Figure 7.14: Market-related barriers to exporting (multi-response)

Source: La Trobe NEC Business Intentions Survey

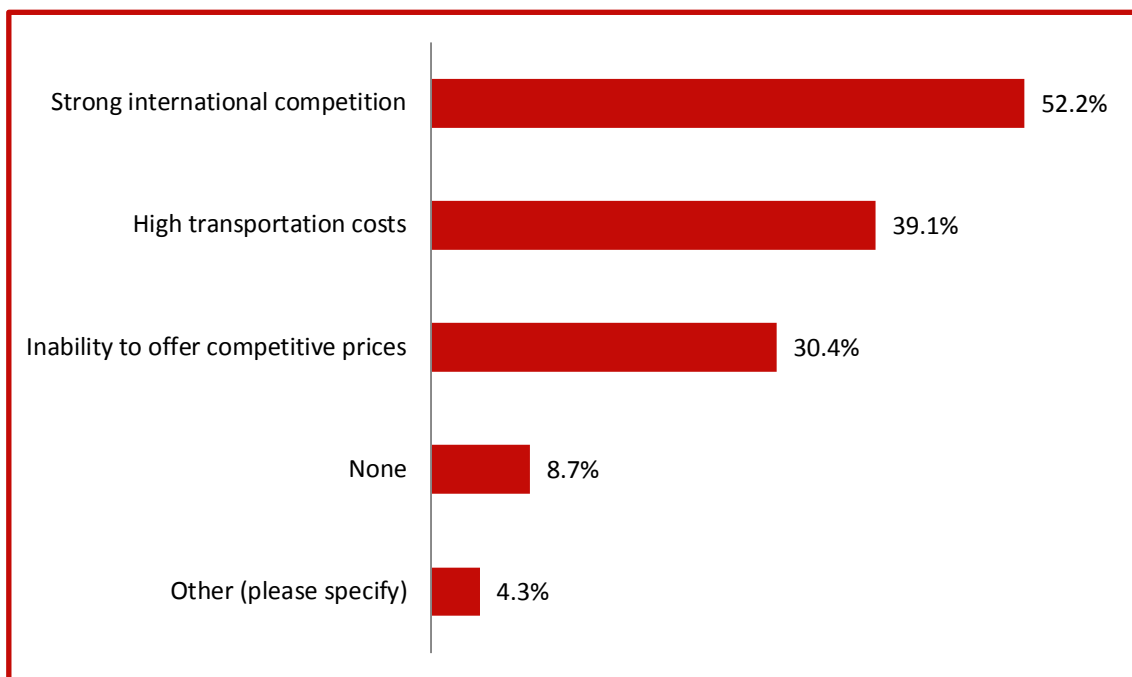
Table 7.11: Market-related barriers to exporting (multi-response)

Answer Options	Response Share	Response Count
Insufficient knowledge of markets	26.1%	6
Insufficient knowledge of contacts	30.4%	7
Difficulties with language differences	17.4%	4
None	30.4%	7
Other (please specify)	13.0%	3
• Regulation		
• breaking into the US market		
• Niche business. Hard to find right customers		
Answered question		23
Skipped question		22

Source: La Trobe NEC Business Intentions Survey

Question 12: What are the main competition-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents noted the main competition-related barriers to exporting are strong international competition (52%), high transportation costs (39%), and an inability to offer competitive prices (30%). Only 9% state that there are no barriers to exporting.

Figure 7.15: Competition-related barriers to exporting (multi-response)

Source: La Trobe NEC Business Intentions Survey

Table 7.12: Competition-related barriers to exporting (multi-response)

Answer Options	Response Share	Response Count
Strong international competition	52.2%	12
Inability to offer competitive prices	30.4%	7
High transportation costs	39.1%	9
None	8.7%	2
Other (please specify)		
• Not all countries trade honestly. Nothing should be done without an L/C	4.3%	1
Answered question		23
Skipped question		22

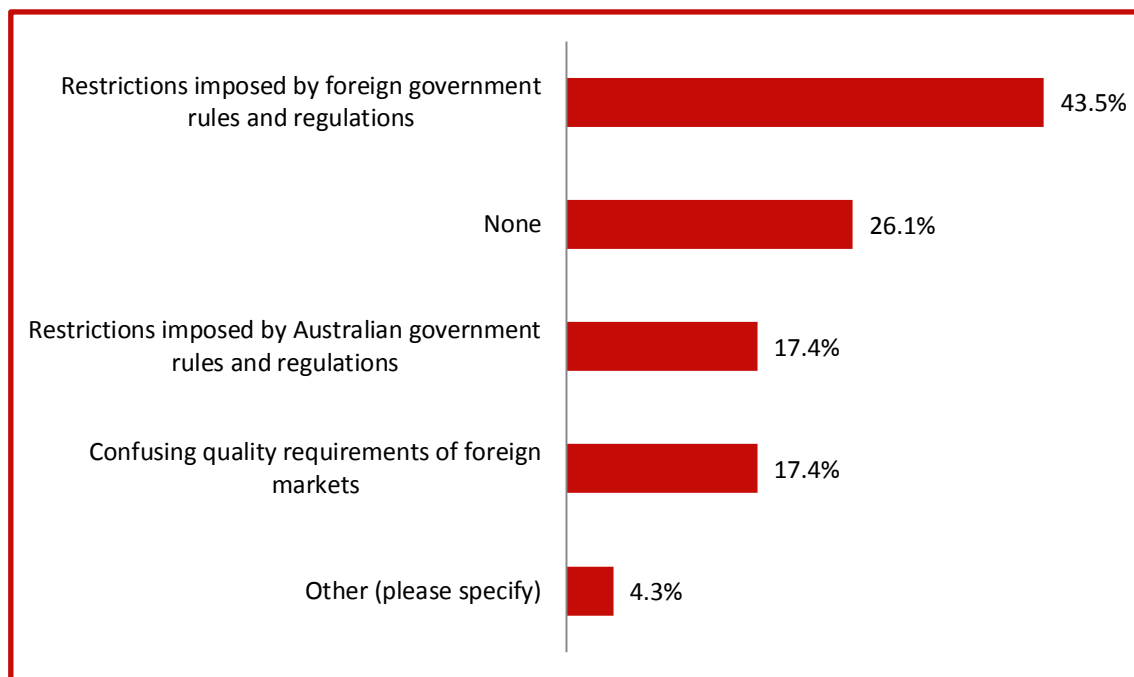
Source: La Trobe NEC Business Intentions Survey

Question 13: What are the main regulatory impediments to exporting that face your business?

The survey allowed respondents to select more than one answer. Almost one-half of respondents noted the main regulatory impediments to exporting are restrictions imposed by foreign government rules and regulations (44%), while others identified restrictions imposed by Australian government rules and regulations (17%) and confusing quality requirements of

foreign markets (17%). However, 26% of businesses surveyed indicated they have not experienced any market-related barriers to exporting.

Figure 7.16: Regulatory impediments to exporting (multi-response)



Source: La Trobe NEC Business Intentions Survey

Table 7.13: Regulatory impediments to exporting (multi-response)

Answer Options	Response Share	Response Count
Restrictions imposed by foreign government rules and regulations	43.5%	10
Confusing quality requirements of foreign markets	17.4%	4
Restrictions imposed by Australian government rules and regulations	17.4%	4
None	26.1%	6
Other (please specify)	4.3%	1
• Unsure		
Answered question		23
Skipped question		22

Source: La Trobe NEC Business Intentions Survey

Question 14: Are there any other barriers to exporting that face your business e.g. human resources-related?

The majority of businesses surveyed skipped this question. The few that responded indicated that barriers include a lack of skilled labour and costs.

Table 7.14: Other barriers that businesses face

Number	Response Text
1	Cost of properly servicing the current & potential export customers.
2	All our costs are too high
3	No
4	lack of skilled labour
5	Not aware of any

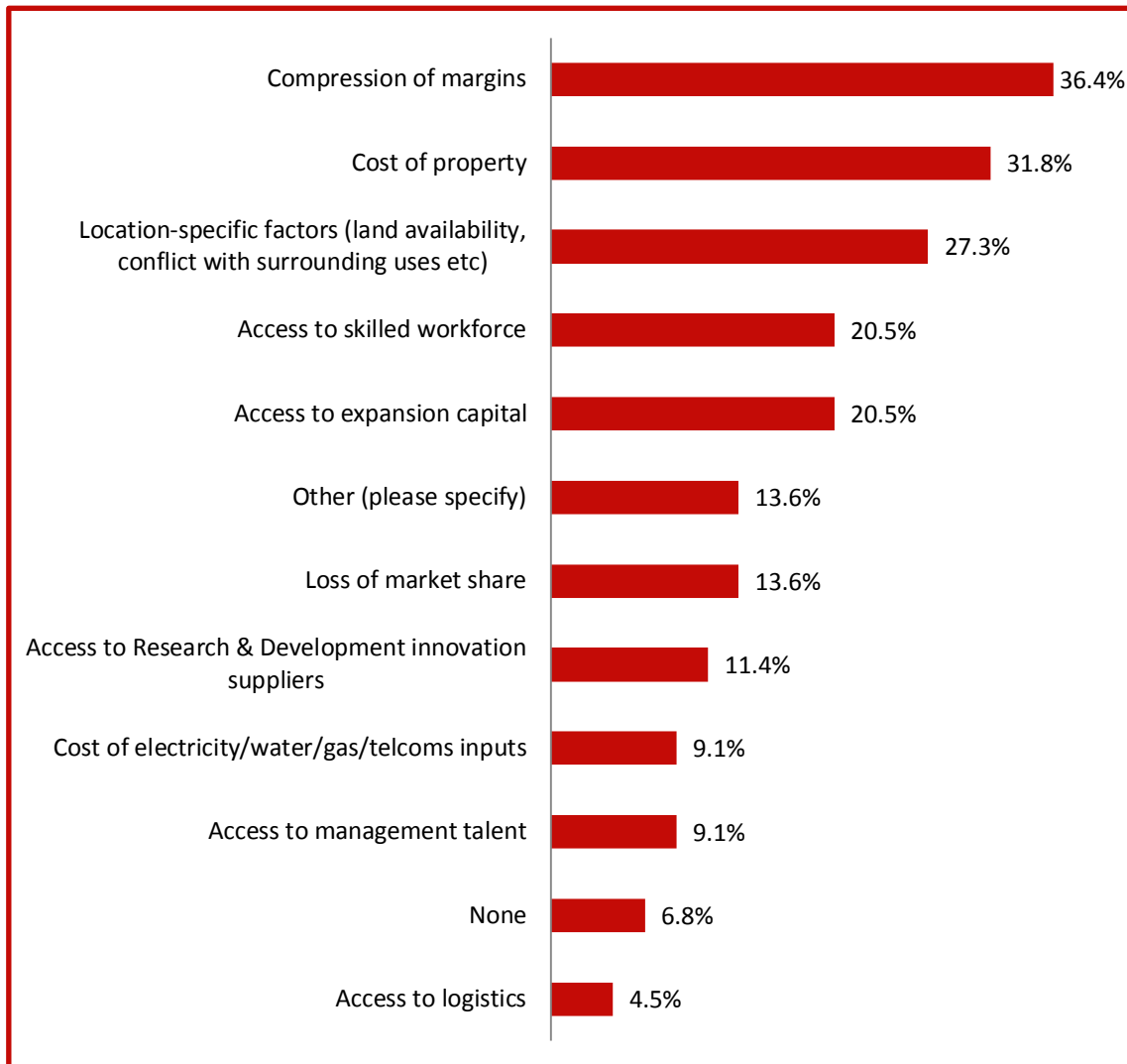
Source: La Trobe NEC Business Intentions Survey

7.4 The Future of your Business

Question 15: What are the main barriers to potential expansion (if any)? Please select as many as apply from the following list:

The survey allowed respondents to select more than one answer. Businesses surveyed identified the main barriers to potential expansion are related to compression of margins (36%), cost of property (32%), and location-specific factors (27%).

Figure 7.17: Main barriers to potential expansion



Source: La Trobe NEC Business Intentions Survey

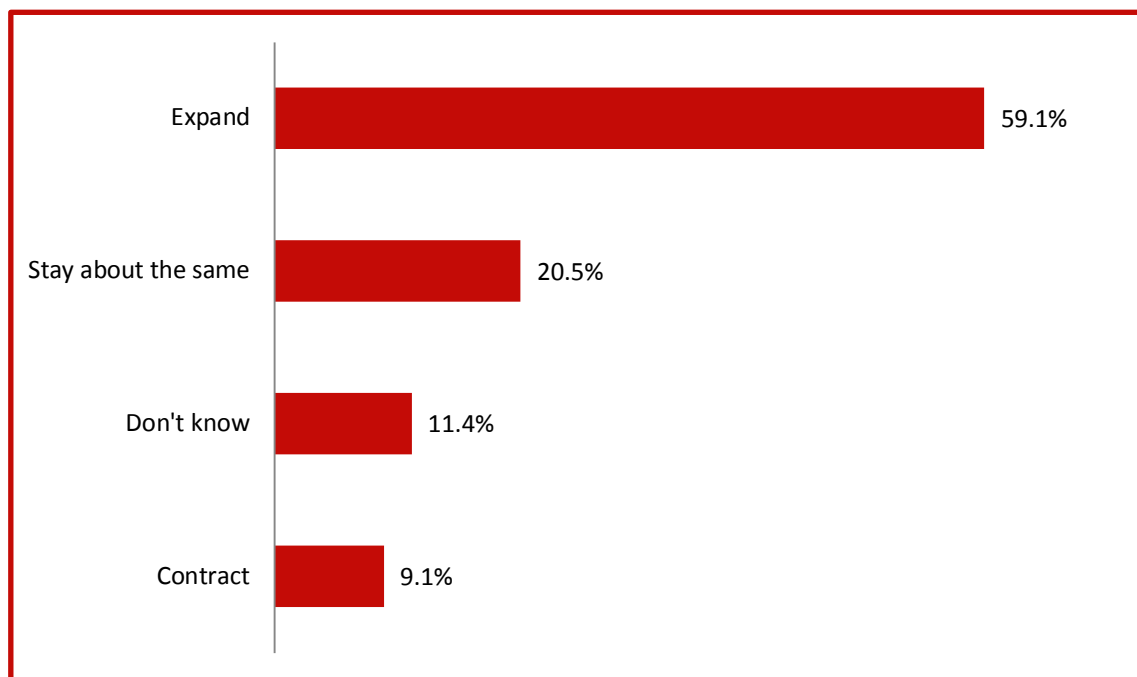
Table 7.15: Main barriers to potential expansion (multi-response)

Answer Options	Response Share	Response Count
Access to expansion capital	20.5%	9
Loss of market share	13.6%	6
Compression of margins	36.4%	16
Access to management talent	9.1%	4
Access to skilled workforce	20.5%	9
Access to logistics	4.5%	2
Access to Research & Development innovation suppliers	11.4%	5
Cost of electricity/water/gas/telecoms inputs	9.1%	4
Cost of property	31.8%	14
Location-specific factors (land availability, conflict with surrounding uses etc)	27.3%	12
None	6.8%	3
Other (please specify)		
<ul style="list-style-type: none"> • Irrelevant -super fund • Traffic and lack of infrastructure in place • Too many competitors in the industry • Lack of assistance from Government bureaucrats who have no idea of business needs • EPA and OHS compliance, • Staff culture 	13.6%	6
Answered question		44
Skipped question		1

Source: La Trobe NEC Business Intentions Survey

Question 16: In the next 5 years do you anticipate that the number of employees on site will expand or contract?

Most businesses (59%) anticipate the number of employees on-site will expand in the next 5 years, while the balance anticipate that employment will either stay about the same (21%) or contract (9%). A total of 11% “don’t know”.

Figure 7.18: Number of employees on site in the next 5 years

Source: La Trobe NEC Business Intentions Survey

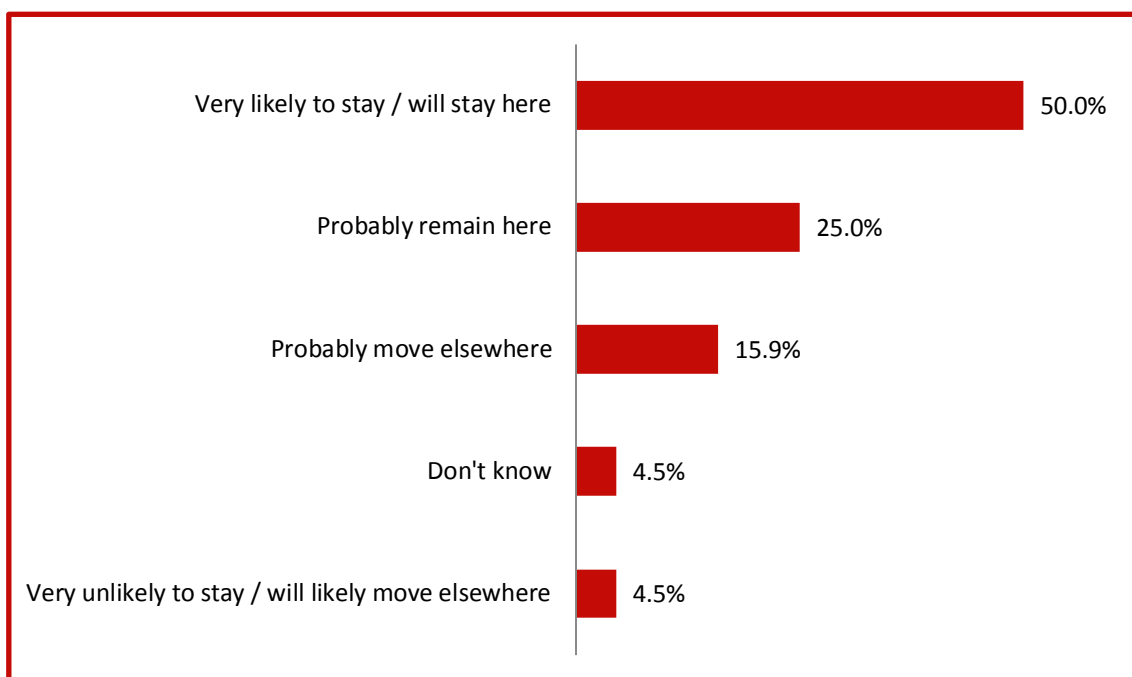
Table 7.16: Number of employees on site in the next 5 years

Answer Options	Response Share	Response Count
Expand	59.1%	26
Contract	9.1%	4
Stay about the same	20.5%	9
Don't know	11.4%	5
Answered question		44
Skipped question		1

Source: La Trobe NEC Business Intentions Survey

Question 17: How likely is your business to stay in its current location over the next 5 years?

Half (50%) of businesses surveyed indicated they are “very likely” to stay in their current location over the next 5 years, while 25% will “probably remain” in the current location, and 16% indicated they will “probably move elsewhere”. Only a very small share (4.5%) indicated they are “likely to move elsewhere”.

Figure 7.19: Likelihood to stay in its current location over the next 5 years

Source: La Trobe NEC Business Intentions Survey

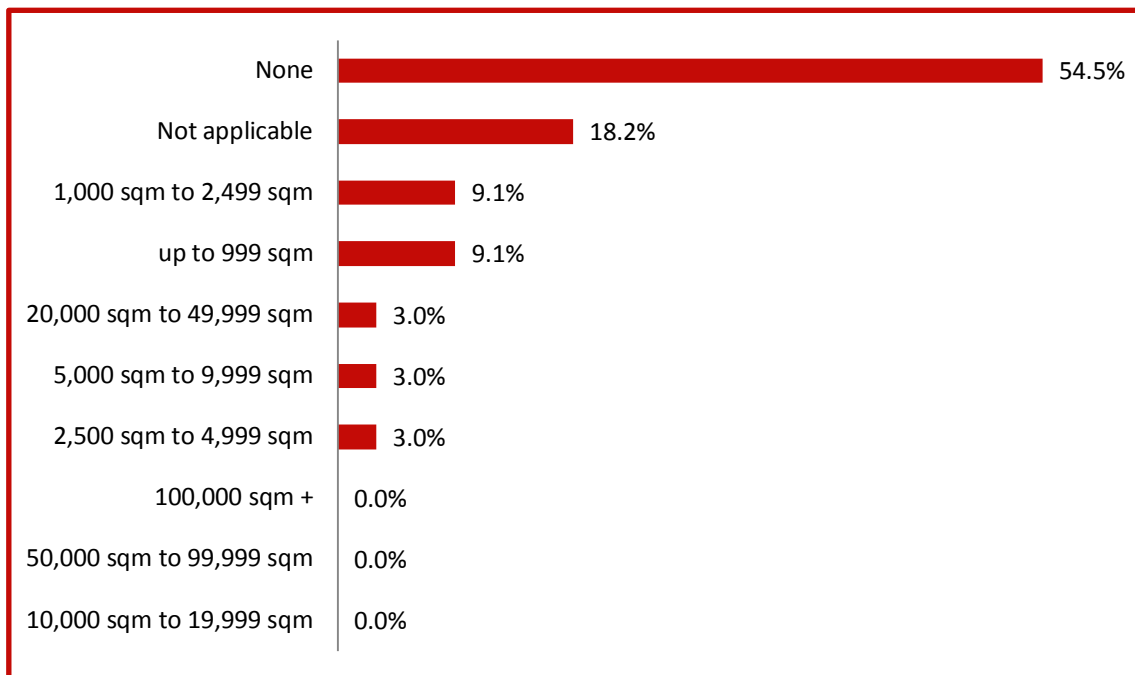
Table 7.17: Likelihood to stay in its current location over the next 5 years

Answer Options	Response Share	Response Count
Very likely to stay / will stay here	50.0%	22
Probably remain here	25.0%	11
Probably move elsewhere	15.9%	7
Very unlikely to stay / will likely move elsewhere	4.5%	2
Don't know	4.5%	2
Answered question		44
Skipped question		1

Source: La Trobe NEC Business Intentions Survey

Question 18: If your business is likely to stay in this location over the next 5 years, what additional land area will be required for expansion purposes?

The majority of respondent who indicated they are likely to stay in the current location over the coming 5 years will not require additional land for expansion purposes (55%). Other businesses generally require up to 999 m² of land (9%), or between 1,000m² to 2,499 m² of land (9%).

Figure 7.20: Additional land area required for expansion purposes

Source: La Trobe NEC Business Intentions Survey

Table 7.18: Additional land area required for expansion purposes

Answer Options	Response Share	Response Count
None	54.5%	18
up to 999 sqm	9.1%	3
1,000 sqm to 2,499 sqm	9.1%	3
2,500 sqm to 4,999 sqm	3.0%	1
5,000 sqm to 9,999 sqm	3.0%	1
10,000 sqm to 19,999 sqm	0.0%	0
20,000 sqm to 49,999 sqm	3.0%	1
50,000 sqm to 99,999 sqm	0.0%	0
100,000 sqm +	0.0%	0
Not applicable	18.2%	6
Answered question		33
Skipped question		12

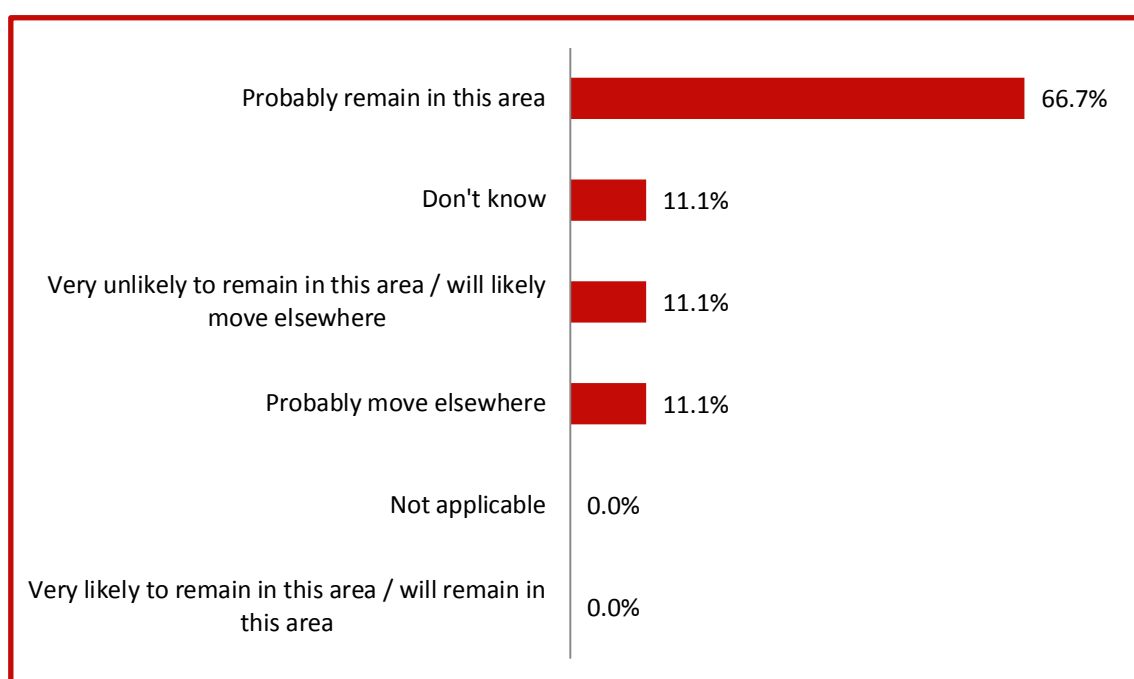
Source: La Trobe NEC Business Intentions Survey

7.5 Alternative Locations

Question 19: If your business was to move from its current location, how likely is the business to remain in the La Trobe National Employment Cluster?

The majority of businesses (67%) indicated they would “probably remain in this area”. The remaining businesses indicated (respectively) that they will “probably move elsewhere” (11%), “will likely move elsewhere” (11%) or “don’t know” (11%).

Figure 7.21: Likelihood of business to remain in the La Trobe NEC



Source: La Trobe NEC Business Intentions Survey

Table 7.19: Likelihood of business to remain in the La Trobe NEC

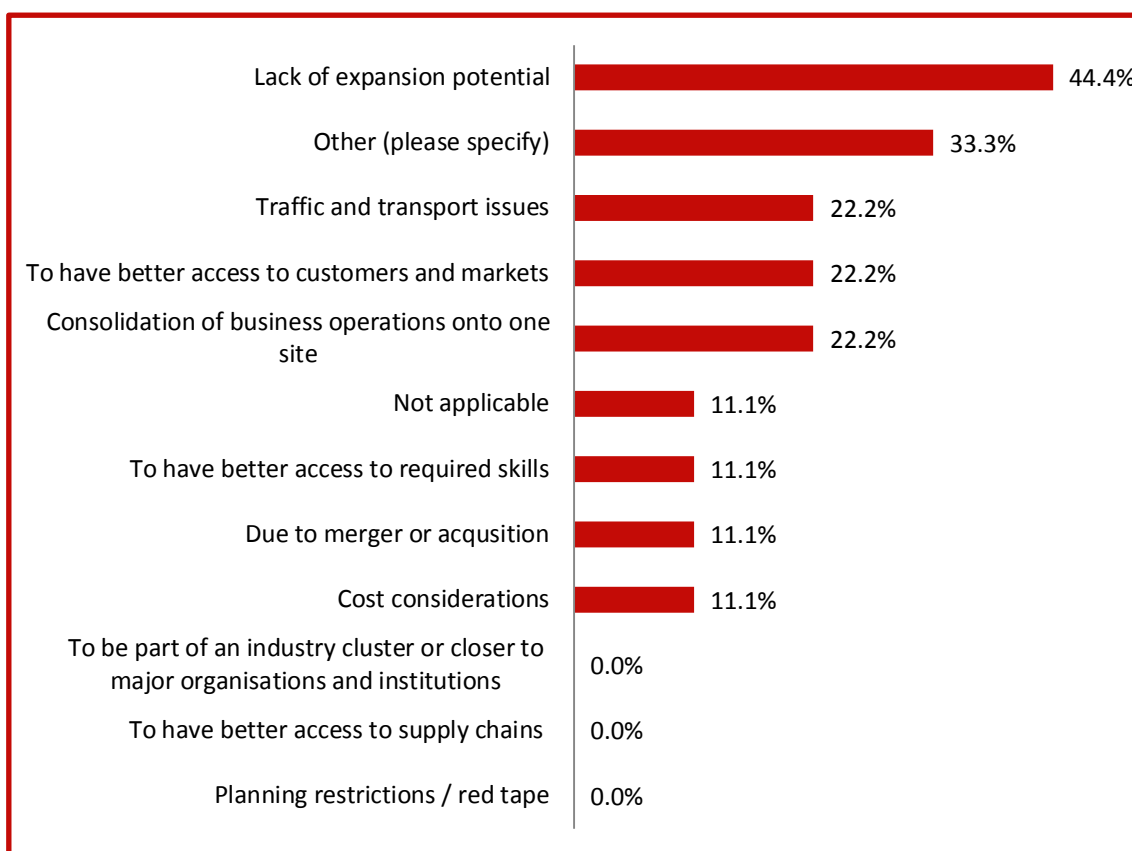
Answer Options	Response Share	Response Count
Very likely to remain in this area / will remain in this area	0.0%	0
Probably remain in this area	66.7%	6
Probably move elsewhere	11.1%	1
Very unlikely to remain in this area / will likely move elsewhere	11.1%	1
Don't know	11.1%	1
Not applicable	0.0%	0
Answered question		9
Skipped question		36

Source: La Trobe NEC Business Intentions Survey

Question 20: What would be your main reasons for moving out of the La Trobe National Employment Cluster?

The survey allowed respondents to select more than one answer. The main reason for moving out of the La Trobe NEC would be a lack of potential for expansion (44%). Other reasons include traffic and transport issues (22%) having better access to customers and markets (22%), and consolidation of business operations onto one site (22%).

Figure 7.22: Reasons for moving out of the La Trobe NEC (multi-response)



Source: La Trobe NEC Business Intentions Survey

Table 7.20: Reasons for moving out of the La Trobe NEC (multi-response)

Answer Options	Response Share	Response Count
Consolidation of business operations onto one site	22.2%	2
Lack of expansion potential	44.4%	4
Cost considerations	11.1%	1
Planning restrictions / red tape	0.0%	0
Due to merger or acquisition	11.1%	1
To have better access to customers and markets	22.2%	2
To have better access to supply chains	0.0%	0
To have better access to required skills	11.1%	1
To be part of an industry cluster or closer to major organisations and institutions	0.0%	0
Traffic and transport issues	22.2%	2
Not applicable	11.1%	1
Other (please specify)		
<ul style="list-style-type: none"> • More suitable premises • May move to a more geographically neutral area • Terrible internet availability 	33.3%	3
Answered question		9
Skipped question		36

Source: La Trobe NEC Business Intentions Survey

Question 21: What alternative locations would you seriously consider for your business?

The majority of respondents skipped this question. Those who provided an answer mentioned Essendon, Heidelberg Heights, Fairfield and Bundoora.

Table 7.21: Alternative business locations

Number	Location:
1	Essendon
2	Heidelberg Heights
3	Fairfield
4	Bundoora
Answered question	4
Skipped question	41

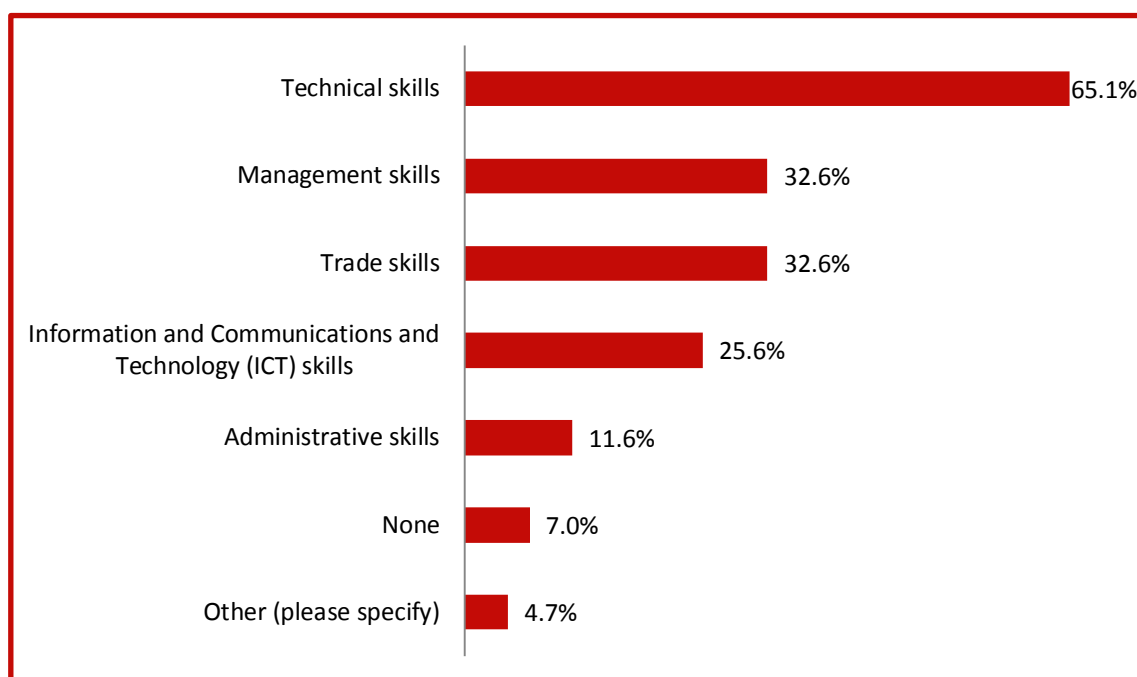
Source: La Trobe NEC Business Intentions Survey

7.6 Skills

Question 22: Thinking about your workforce over the next 5 years, what particular skill shortages may affect your business and require upskilling?

The survey allowed respondents to select more than one answer. The main skills requirements for over the next 5 years are technical skills (65%), management skills (33%), trade skills (33%), and ICT (26%).

Figure 7.23: Skill shortages that may require up-skilling over the next 5 years (multi-response)



Source: La Trobe NEC Business Intentions Survey

Table 7.22: Skill shortages that may require up-skilling over the next 5 years (multi-response)

Answer Options	Response Share	Response Count
Trade skills	32.6%	14
Technical skills	65.1%	28
Information and Communications and Technology (ICT) skills	25.6%	11
Administrative skills	11.6%	5
Management skills	32.6%	14
None	7.0%	3
Other (please specify)	4.7%	2
• Irrelevant		
• Rapid development culture required. resistance to change		
Answered question		43
Skipped question		2

Source: La Trobe NEC Business Intentions Survey

7.7 Impact of Infrastructure / Investment Initiatives

Question 23: To what extent would improved road infrastructure support your business and encourage you to stay in the precinct?

One-third of businesses surveyed (33%) indicated that improved road infrastructure would “greatly increase” their intention to stay, while another 37% indicated it would “moderately increase” their intention to stay, and 30% indicated it would have “no impact” on their intention to stay.

Table 7.23: Impact of improved road transport infrastructure on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	14	16	13	1.98	43
Per cent	33%	37%	30%		
Answered question					43
Skipped question					2

Source: La Trobe NEC Business Intentions Survey

Question 24: To what extent would improved public transport infrastructure support your business and encourage you to stay in the precinct?

The majority of businesses surveyed indicated that improved public transport would “greatly increase” (28%) or “moderately increase” (28%) their intention to stay in the La Trobe NEC, with the balance (44%) saying it would have “no impact” on their intention to stay.

Table 7.24: Impact of improved public transport infrastructure on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	12	12	19	2.16	43
Per cent	28%	28%	44%		
Answered question					43
Skipped question					2

Source: La Trobe NEC Business Intentions Survey

Question 25: To what extent would improved broadband (e.g. access to the National Broadband Network) support your business and encourage you to stay in the precinct?

The majority of businesses (79%) in the survey indicated that improved broadband would “greatly increase” their intention to stay (56%) or “moderately increase” (23%) their intention to stay. A smaller share (21%) indicated it would have “no impact” on their intention to stay.

Table 7.25: Impact of improved broadband on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
	24	10	9	1.65	43
Per cent	56%	23%	21%		
Answered question					43
Skipped question					2

Source: La Trobe NEC Business Intentions Survey

Question 26: To what extent would improved utilities infrastructure (e.g. gas, electricity, water, sewerage) support your business and encourage you to stay in the precinct?

The majority of respondents (56%) indicated that improved utilities infrastructure would “greatly increase” (19%) or “moderately increase” (37%) their intention to stay; the balance (44%) indicate it would have “no impact” on their decision to stay

Table 7.26: Impact of improved utilities infrastructure on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	8	16	19	2.26	43
Per cent	19%	37%	44%		
Answered question					43
Skipped question					2

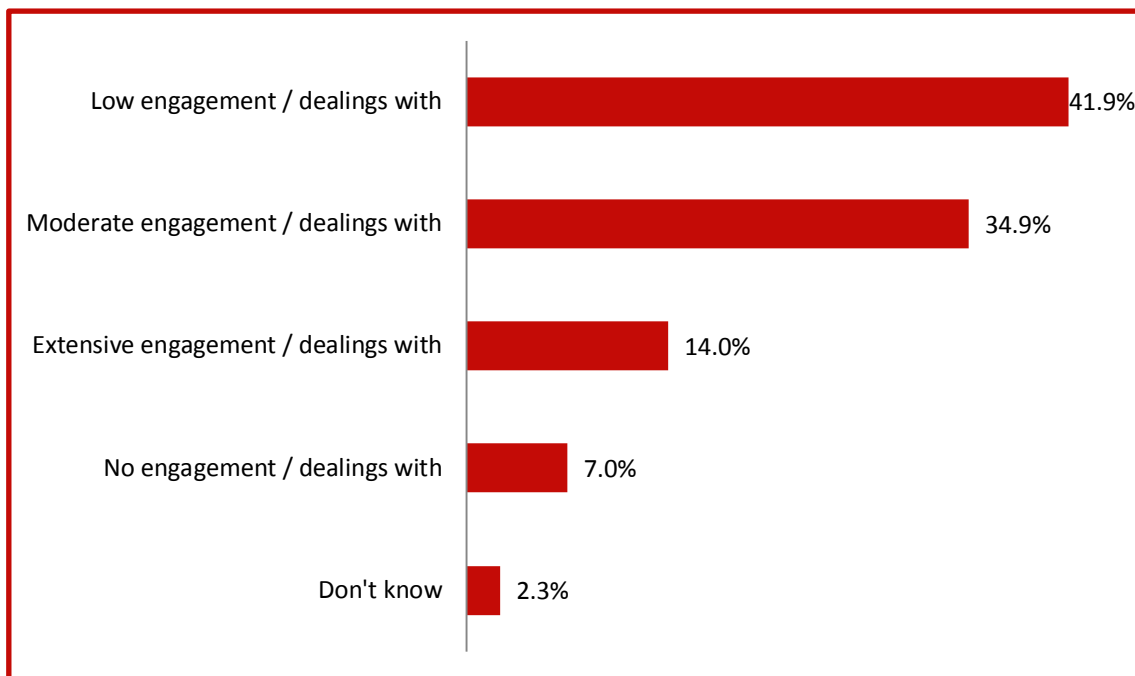
Source: La Trobe NEC Business Intentions Survey

7.8 Building Relationships

Question 27: How would you rate the extent of relationships your business has with other businesses, services or institutions in the precinct?

Almost one-half of respondents (49%) indicated an “extensive level” (14%) or a “moderate level” (35%) of engagement with other businesses in the precinct, with a similar share (49%) having only “low engagement” or dealings with other businesses. About 2% “don’t know”.

Figure 7.24: Extent of relationships the business has with other businesses, services or institutions in the precinct



Source: La Trobe NEC Business Intentions Survey

Table 7.27: Extent of relationships the business has with other businesses, services or institutions in the precinct.

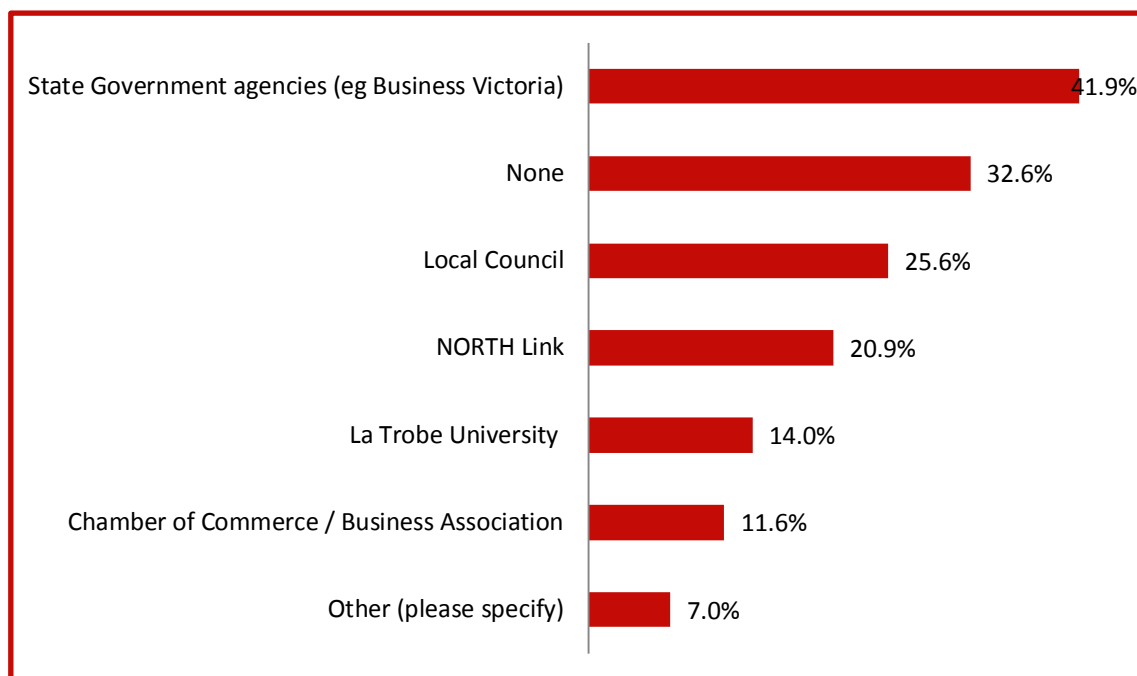
Answer Options	Response Share	Response Count
Extensive engagement / dealings with	14.0%	6
Moderate engagement / dealings with	34.9%	15
Low engagement / dealings with	41.9%	18
No engagement / dealings with	7.0%	3
Don't know	2.3%	1
Answered question		43
Skipped question		2

Source: La Trobe NEC Business Intentions Survey

Question 28: Which are the main businesses or institutions in the precinct that your business currently engages or collaborates with?

The survey allowed respondents to select more than one answer. The businesses or institutions that businesses currently engage or collaborate with most frequently are the State Government agencies (42%), local councils (26%), and NORTH Link (21%). Others also mention La Trobe University (14%) and local Chambers of Commerce (12%). One-third of businesses surveyed indicated they do not collaborate or engage with any other business or institutions in the precinct.

Figure 7.25: Main businesses or institutions that the business is currently engaging or collaborating with (multi-response)



Source: La Trobe NEC Business Intentions Survey

Table 7.28: Main businesses or institutions that the business is currently engaging or collaborating with (multi-response)

Answer Options	Response Share	Response Count
Local Council	25.6%	11
State Government agencies (e.g. Business Victoria)	41.9%	18
La Trobe University	14.0%	6
NORTH Link	20.9%	9
Chamber of Commerce / Business Association	11.6%	5
None	32.6%	14
Other (please specify)	7.0%	3
Answered question		43
Skipped question		2

Source: La Trobe NEC Business Intentions Survey

Question 29: What else, if anything, would make the precinct a more attractive location for your business in the future?

The challenges that businesses would like to overcome relate to the safety and security, power to the site, planning approvals, and broadband.

Table 7.29: Challenges that businesses would like to overcome

Number	Response Text
1	Security and safe place to work
2	More power to the site & gas on site. Upgraded Telstra line !!!
3	quicker planning permits
4	Some solar parks - with gardens, pop up cafes & free solar power points for people to charge up their equipment - receive free Wi-Fi etc - excess power is used for nice lighting displays at night time.
5	more buses
6	Massive improvements to present vehicular traffic congestions & improved Public Transport and Infrastructure
7	Internet infrastructure. Better roads infrastructure
8	Reduce road congestion
9	Deterrence of fly tippers
10	Upgrade from ADSL 1 , have town gas on site & increase power supply. These days you get 90 almost to a 10,000 sq foot factory site ie our planning is for warehouse to distribute Chinese made product & the idea of manufacturing on site is just not thought of.
<hr/>	
Answered question	10
<hr/>	
Skipped question	35

Source: La Trobe NEC Business Intentions Survey

7.9 Conclusions

1. Businesses chose to locate in the La Trobe NEC primarily due to cost considerations (27%) and land availability (22%).
2. Limitations or drawbacks of the location are distance from clients (29%), distance from where staff live (18%) and lack of accessibility to public transport (18%).
3. Approximately one in four businesses surveyed indicate the precinct has a poor reputation (24%), while a lack safety and security is regarded by 36% of respondents as the main limitation of doing business in the La Trobe NEC.
4. Approximately one-half of businesses surveyed (47%) in the La Trobe NEC are currently exporting overseas, and an additional 13% of businesses are interested in exporting. Businesses not currently exporting note that the main barrier is related to the high level of competition internationally.
5. Compression of margins (36%) is the main barrier to expansion for businesses located in the La Trobe NEC.
6. Half the businesses surveyed (50%) indicate they are very likely/ will remain in the La Trobe NEC over the coming 5 years.

7. Over half the businesses surveyed in the La Trobe NEC (56%) would be greatly enticed to stay in the precinct through improved broadband.
8. Technical skills (67%) are the main upskilling requirement identified over the next 5 years for La Trobe NEC businesses.
9. The majority of La Trobe NEC businesses have low to moderate levels of engagement (71% combined) with other businesses, services or institutions in the precinct.

8 SUNSHINE NEC – SURVEY FINDINGS

8.1 Introduction

The online business intentions survey was distributed to 94 businesses in the Sunshine NEC, with a total of 36 responses received. This represents a response rate of approximately 38%.

Just over one-third of business respondents were associated with the manufacturing sector, (35%), followed by health care and social assistance organisations (18%), wholesale trade businesses (12%), professional, scientific and technical services (9%), financial and insurance services (6%), and education and training organisations (6%).

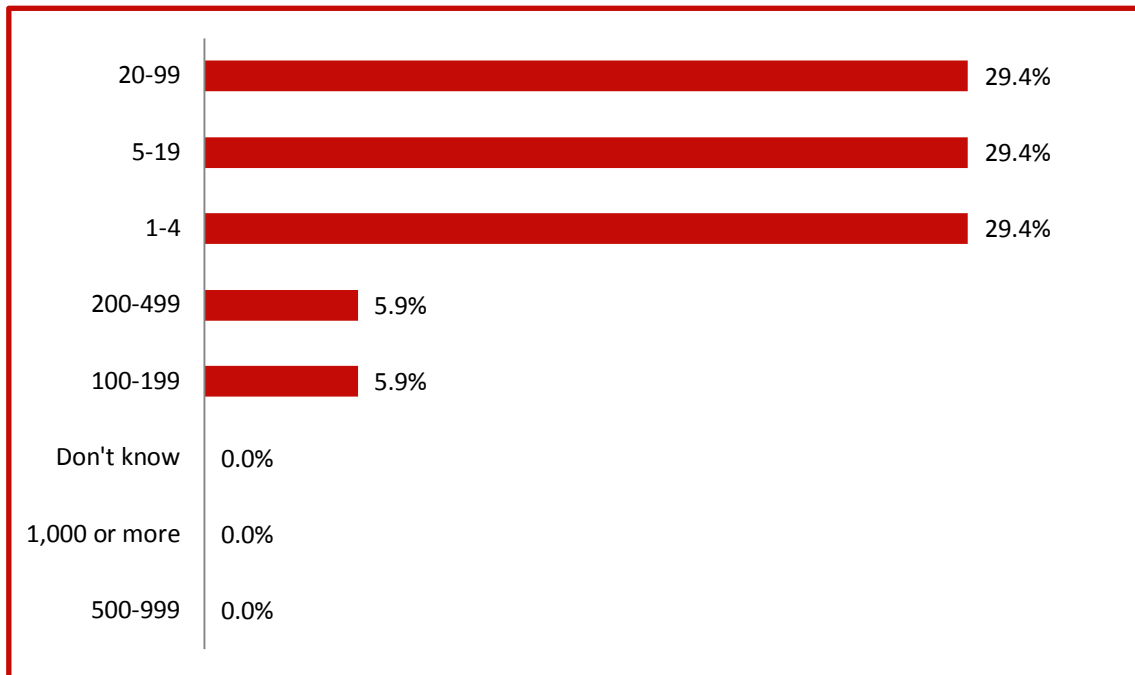
The majority of respondents (60%) are very small to medium-sized businesses, with between 5-99 on site employees (90%), 29% of respondents were micro-businesses with only 1-4 on-site employees, 6% of respondents large businesses with 100-199 on-site employees, and 6% of respondents are major businesses with 200-499 on-site employees.

Figure 8.1: Core area of business undertaken at the site



Source: Sunshine NEC Business Intentions Survey

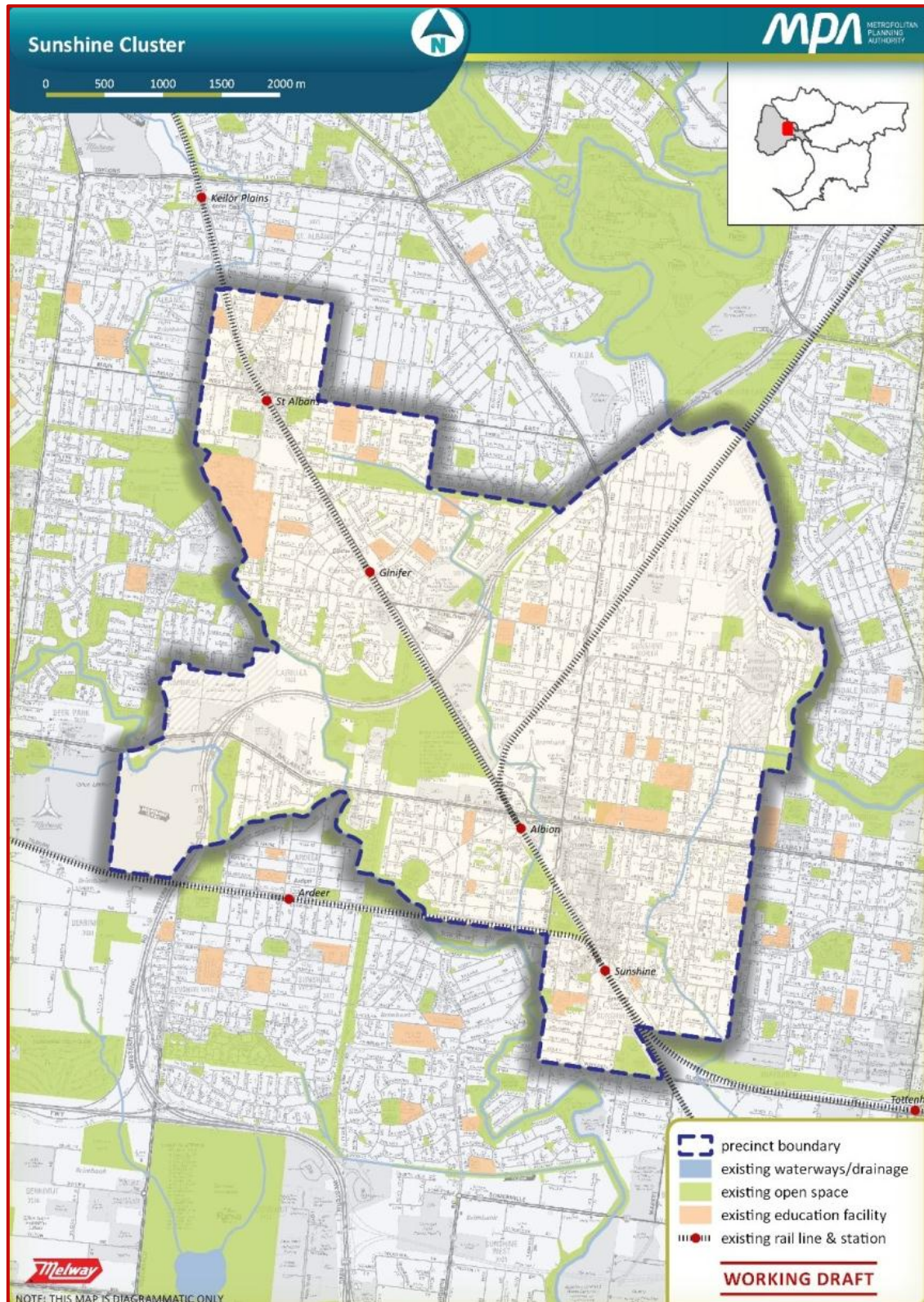
Figure 8.2: Number of employees that work from the site



Source: Sunshine NEC Business Intentions Survey

Figure 8.3 outlines the boundaries of the Sunshine NEC study area, while sections 8.2 to 8.8 provide a summary of survey results.

Figure 8.3: Sunshine National Employment Cluster – Precinct Location



Source: Metropolitan Planning Authority

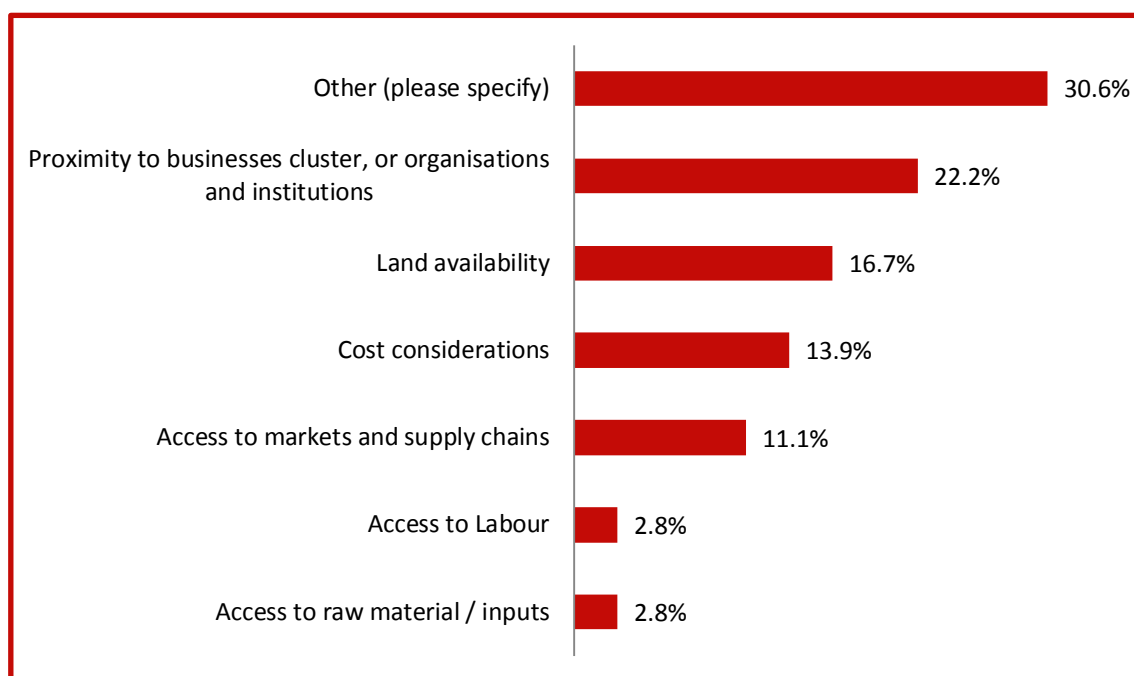
8.2 Choosing the Best Location

Question 1: What was the primary reason for your business moving to its current location?

The online survey explored reasons as to why businesses chose to locate in Sunshine NEC. The most frequent responses were as follows:

One of the main reasons businesses have located in Sunshine NEC are the location's proximity to business clusters, or organisations and institutions (22%), the land available (17%), cost considerations (14%), and access to markets and supply chains (11%).

Figure 8.4: Primary reason for business moving to its current location



Source: Sunshine NEC Business Intentions Survey

Table 8.1: Primary reason for business moving to its current location

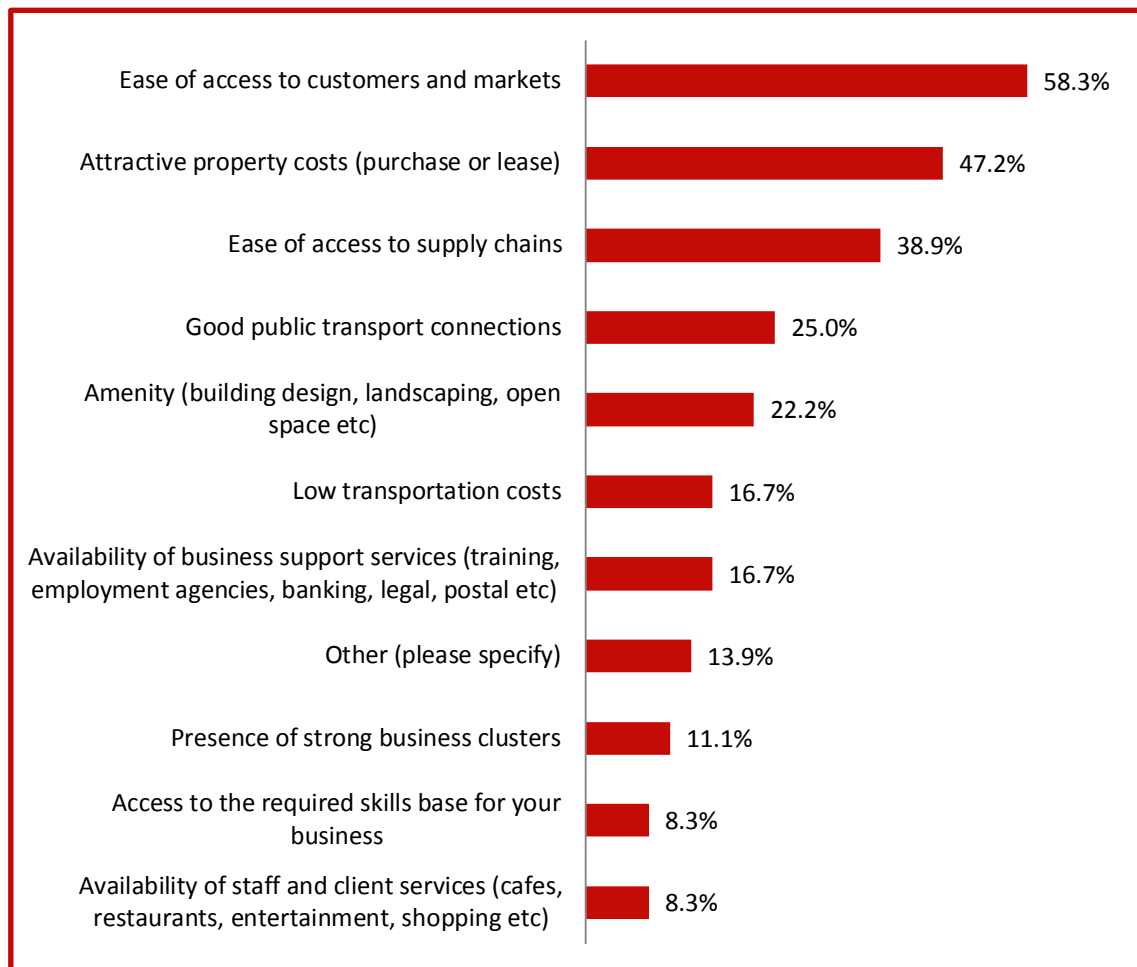
Answer Options	Response Share	Response Count
Land availability	16.7%	6
Cost considerations	13.9%	5
Access to markets and supply chains	11.1%	4
Access to raw material / inputs	2.8%	1
Access to Labour	2.8%	1
Proximity to businesses cluster, or organisations and institutions	22.2%	8
Other (please specify)		
<ul style="list-style-type: none"> Geographically central to contract are There has never been a funeral director in this area of the western suburbs with full funeral home facilities Accessibility Part of corporation To eradicate disadvantage for young people through having 20 not for profit charities co-located in the heart of Sunshine Business is registered at home address Location - central to Melbourne's industrial areas Demand for services Grew up in Sunshine My home - home based business Central to western metropolitan Melbourne 	30.6%	11
Answered question		36
Skipped question		0

Source: Sunshine NEC Business Intentions Survey

Question 2: What are the key benefits or strengths of the current location of your premises?

Businesses surveyed indicated the key benefits or strengths of Sunshine NEC relate to the location's ease of access to customers and markets (58%), attractive property costs (47%), and ease of access to supply chains (39%). Good public transport access (25%) and amenity (22%) are also important locational attributes.

Figure 8.5: Key benefits or strength of the current location (multi-response)



Source: Sunshine NEC Business Intentions Survey

Table 8.2: Key benefits or strength of the current location (multi-response)

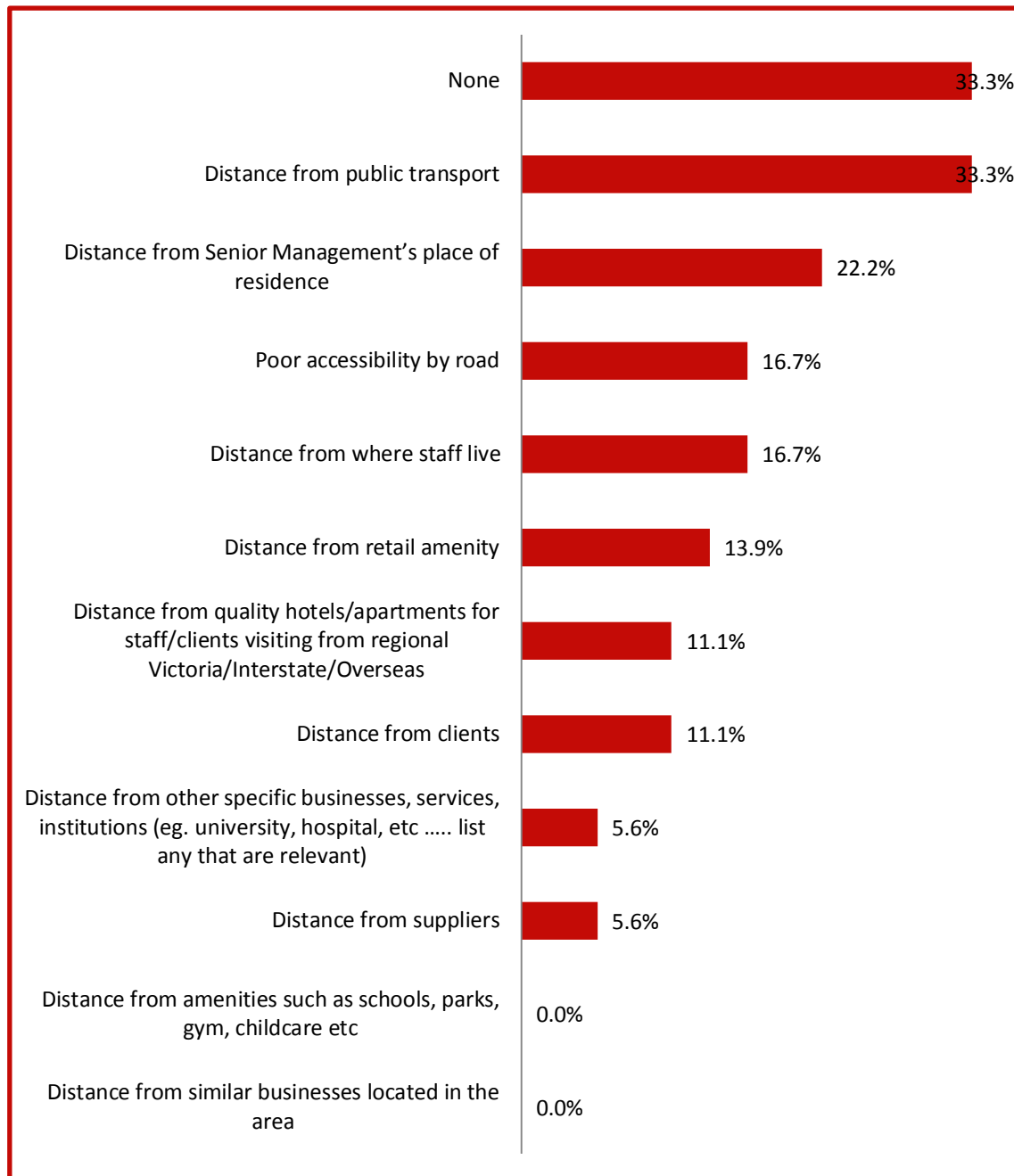
Answer Options	Response Share	Response Count
Attractive property costs (purchase or lease)	47.2%	17
Ease of access to customers and markets	58.3%	21
Ease of access to supply chains	38.9%	14
Availability of business support services (training, employment agencies, banking, legal, postal etc)	16.7%	6
Availability of staff and client services (cafes, restaurants, entertainment, shopping etc)	8.3%	3
Presence of strong business clusters	11.1%	4
Access to the required skills base for your business	8.3%	3
Low transportation costs	16.7%	6
Amenity (building design, landscaping, open space etc)	22.2%	8
Good public transport connections	25.0%	9
Other (please specify) <ul style="list-style-type: none"> • Access to transport - road and airport • Close to home • Population base • A community of disadvantaged young people who can access our services easily • Work in many different areas so can leave from home to go wherever the work is 	13.9%	5
Answered question		36
Skipped question		0

Source: Sunshine NEC Business Intentions Survey

Question 3: What do you think are the main locational limitations or drawbacks of your current location?

Businesses surveyed indicated that the main limitations or drawbacks relating to the Sunshine NEC are the location's distance from public transport (33%), distance from senior management's place of residence (22%), poor accessibility by road (17%) and distance from where staff live (17%). However, 33% of respondents did not note any locational limitations or drawbacks of the current location.

Figure 8.6: Main locational limitations or drawbacks of the current location (multi-response)



Source: Sunshine NEC Business Intentions Survey

Table 8.3: Main locational limitations or drawbacks of the current location (multi-response)

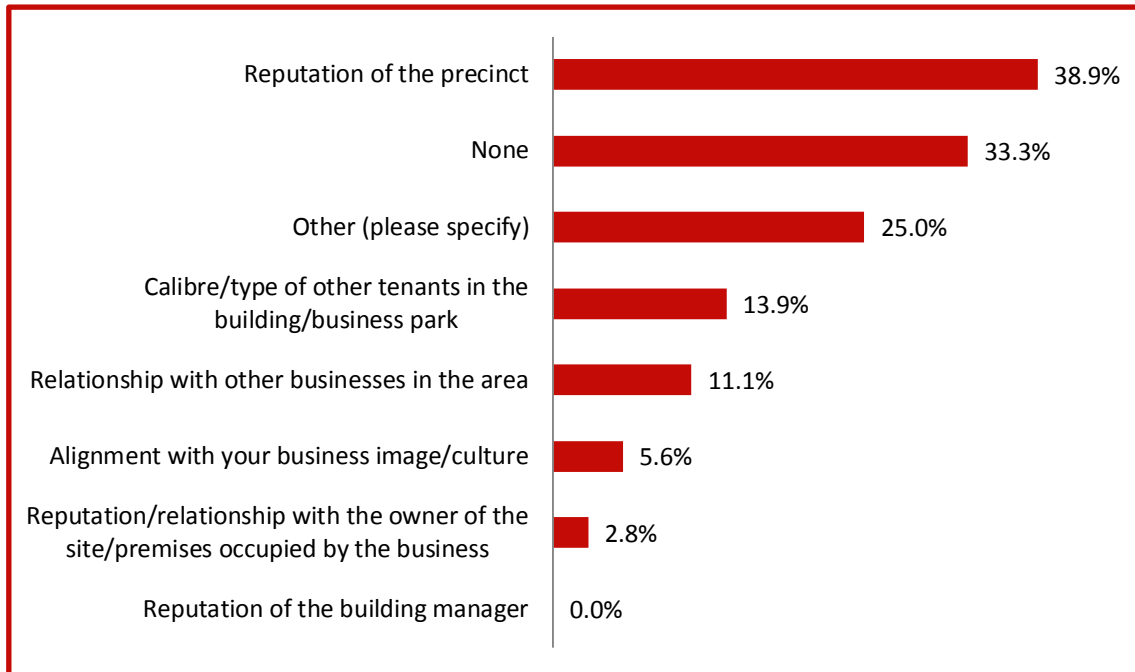
Answer Options	Response Share	Response Count
Distance from clients	11.1%	4
Distance from suppliers	5.6%	2
Distance from similar businesses located in the area	0.0%	0
Distance from where staff live	16.7%	6
Distance from Senior Management's place of residence	22.2%	8
Distance from public transport	33.3%	12
Distance from other specific businesses, services, institutions (e.g.. university, hospital, etc list any that are relevant)	5.6%	2
Poor accessibility by road	16.7%	6
Distance from retail amenity	13.9%	5
Distance from amenities such as schools, parks, gym, childcare etc	0.0%	0
Distance from quality hotels/apartments for staff/clients visiting from regional Victoria/Interstate/Overseas	11.1%	4
None	33.3%	12
Other (please specify)		
<ul style="list-style-type: none"> • Heavy commercial vehicle use of roads • Poor road access is a key factor • Safety • Affordable and accessible housing options for homeless people, high levels of crime • Parking facilities • Heritage Overlay • traffic jams in west gate bridge causes traffic problem • staff and client parking is reducing as the area is growing 		8
Answered question		36
Skipped question		0

Source: Sunshine NEC Business Intentions Survey

Question 4: What do you think are the main image/reputation/relationship limitations or drawbacks of your current location?

Approximately 40% of businesses surveyed indicated the main limitation relating to Sunshine NEC is the location's reputation (although this "location" aspect has not been described by the respondents). Other responses noted include the graffiti and crime, planning issues, and untidy streets. However, 33% of businesses surveyed did not note any image/reputation/relationship limitations.

Figure 8.7: Main image/reputation/relationship limitations of the current location (multi-response)



Source: Sunshine NEC Business Intentions Survey

Table 8.4: Main image/reputation/relationship limitations of the current location (multi-response)

Answer Options	Response Share	Response Count
Reputation/relationship with the owner of the site/premises occupied by the business	2.8%	1
Reputation of the building manager	0.0%	0
Alignment with your business image/culture	5.6%	2
Calibre/type of other tenants in the building/business park	13.9%	5
Reputation of the precinct	38.9%	14
Relationship with other businesses in the area	11.1%	4
None	33.3%	12
Other (please specify)		
<ul style="list-style-type: none"> • Most businesses aren't house proud, Unkempt grass, rubbish etc • Reputation of the area - crime rate • Sand & dust contamination from cement works reprocessing cement waste material next door • Considered an industrial business in a residential area • There are too many permits being granted to community centres and religious organisations in Ravenhall. We purpose built a \$4million building to be in a premium industrial estate and are being crowded out by inappropriate developments that have no benefit to our business or its image. Our property value is likely to now be negatively impacted by this • Gentrification glosses over the reality of the structural deficits for disadvantaged communities • Graffiti and crime • Heritage Overlay preventing development and employment • sunshine is sometime misinterpreted as a down - market precinct 	25.0%	9
Answered question		36
Skipped question		0

Source: Sunshine NEC Business Intentions Survey

Question 5: Are there any design/features of the site/building that are a drawback to your current location?

Business owners were asked to indicate any design features of the site or building that may be a limitation to their location. The majority of businesses surveyed indicated no such limitations existed (33%), while others noted the lack of parking for staff (28%) and IT infrastructure (25%) are drawbacks to their current location, as well as lack of parking for clients/customers (22%).

Figure 8.8: Design/features of the site/building that are a drawback to the current location (multi-response)



Source: Sunshine NEC Business Intentions Survey

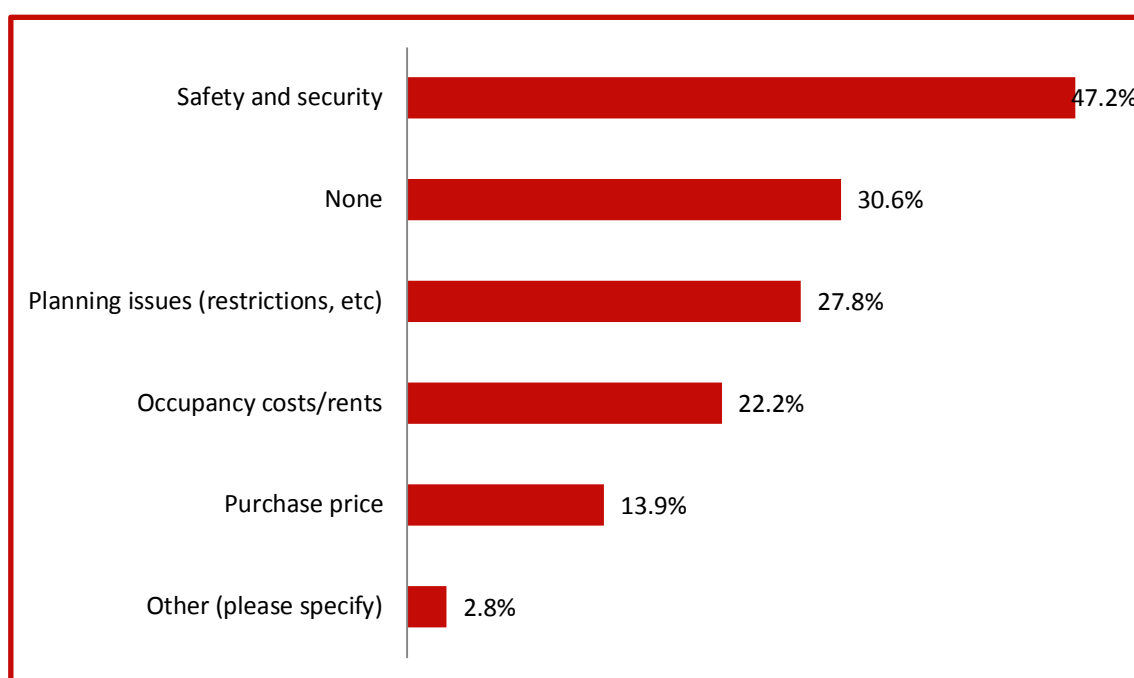
Table 8.5: Design/features of the site/building that are a drawback to the current location (multi-response)

Answer Options	Response Per cent	Response Count
Size of site/premises	13.9%	5
Ability to have purpose-built premises	13.9%	5
Green rating/sustainability initiatives	8.3%	3
IT infrastructure	25.0%	9
Quality/style of fit-out	8.3%	3
Quality/style of building/accommodation	11.1%	4
Availability of parking for staff	27.8%	10
Availability of parking for clients/customers	22.2%	8
None	33.3%	12
Other (please specify)		
<ul style="list-style-type: none"> • Internet speed slow • Building Setback from passing road traffic, difficult to see & find. • As previously stated we built here to be surrounded by premium industrial premises and we will now have 2 community centres in our street, one next door. We moved here to escape the wholesale food traffic in Tullamarine. We did not expect to be surrounded by non-commercial properties • Transport access for young people is difficult • Access road 	16.7%	6
Answered question		36
Skipped question		0

Source: Sunshine NEC Business Intentions Survey

Question 6: What are the main costs/other limitations or drawbacks of your current location? Please select as many as apply from the following list:

The main limitations of the current location for businesses are related to safety and security issues (47%), planning issues (28%), and occupancy costs (22%). However, almost one-third of businesses (31%) indicated they do not have any costs or other limitations at their current location.

Figure 8.9: Main costs/other limitations or drawbacks of the current location

Source: Sunshine NEC Business Intentions Survey

Table 8.6: Main costs/other limitations or drawbacks of the current location (multi-response)

Answer Options	Response Share	Response Count
Occupancy costs/rents	22.2%	8
Purchase price	13.9%	5
Planning issues (restrictions, etc)	27.8%	10
Safety and security	47.2%	17
None	30.6%	11
Other (please specify)		
<ul style="list-style-type: none"> Not for profits access to more affordable office lease, paying market rates as per for profit organisations 	2.8%	1
Answered question		36
Skipped question		0

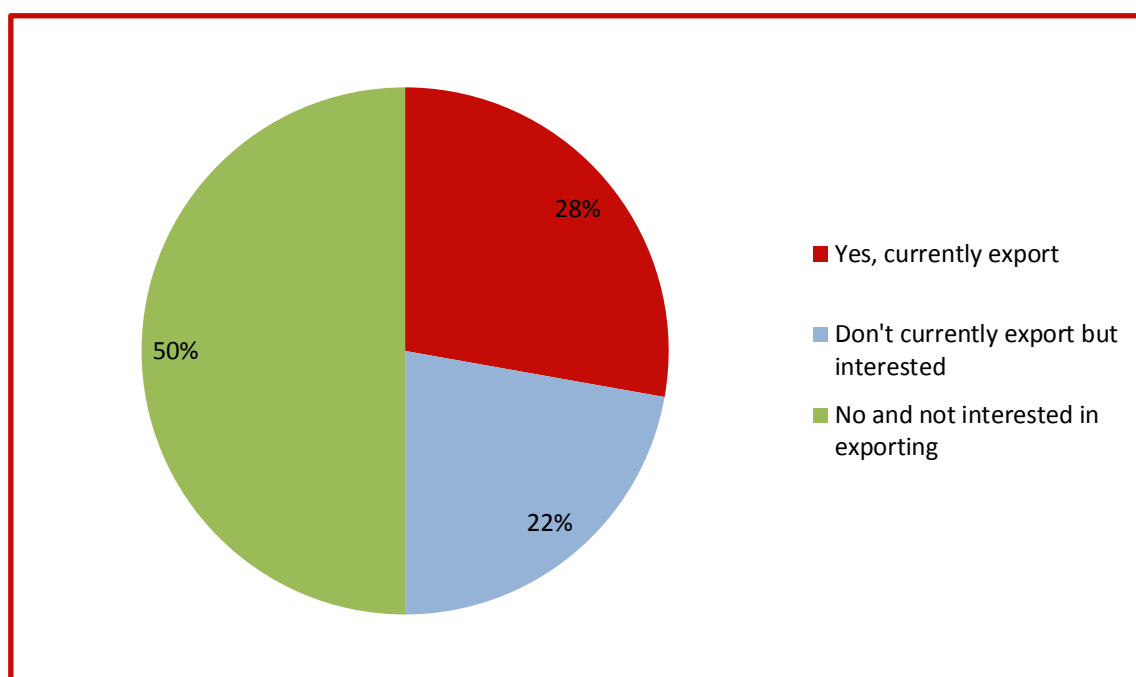
Source: Sunshine NEC Business Intentions Survey

8.3 Exporting

Question 7: Does your business currently export goods or services overseas, or is your business interested in exporting?

Currently, 50% of businesses surveyed already export overseas (28%) or are interested in exporting in the future (22%), while the remaining businesses (50%) have no interest in exporting.

Figure 8.10: Businesses currently exporting goods and services overseas



Source: Sunshine NEC Business Intentions Survey

Table 8.7: Businesses currently exporting goods and services overseas

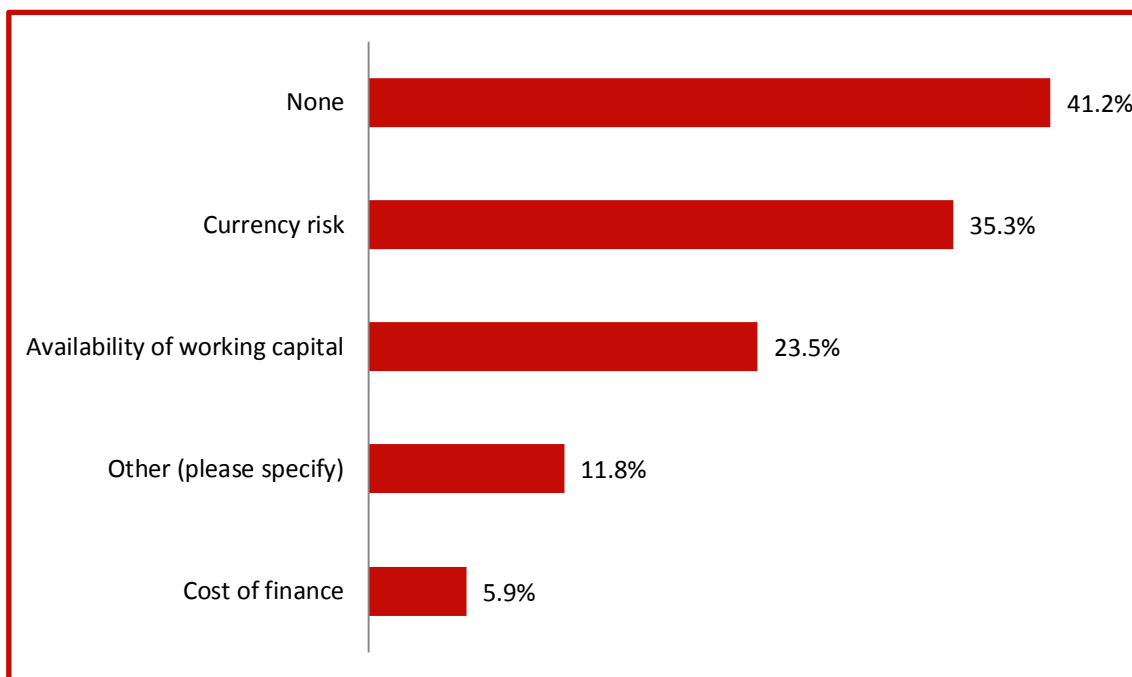
Answer Options	Response Share	Response Count
Yes, currently export	27.8%	10
Don't currently export but interested	22.2%	8
No and not interested in exporting	50.0%	18
Answered question		36
Skipped question		0

Source: Sunshine NEC Business Intentions Survey

Question 8: What are the main finance-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The main finance barriers nominated by the respondents were currency risk (35%) and lack of availability of working capital (24%). However, 41% did not note any financial barriers to exporting.

Figure 8.11: Main finance-related barriers to exporting (multi-purpose)



Source: Sunshine NEC Business Intentions Survey

Table 8.7: Main finance-related barriers to exporting (multi-purpose)

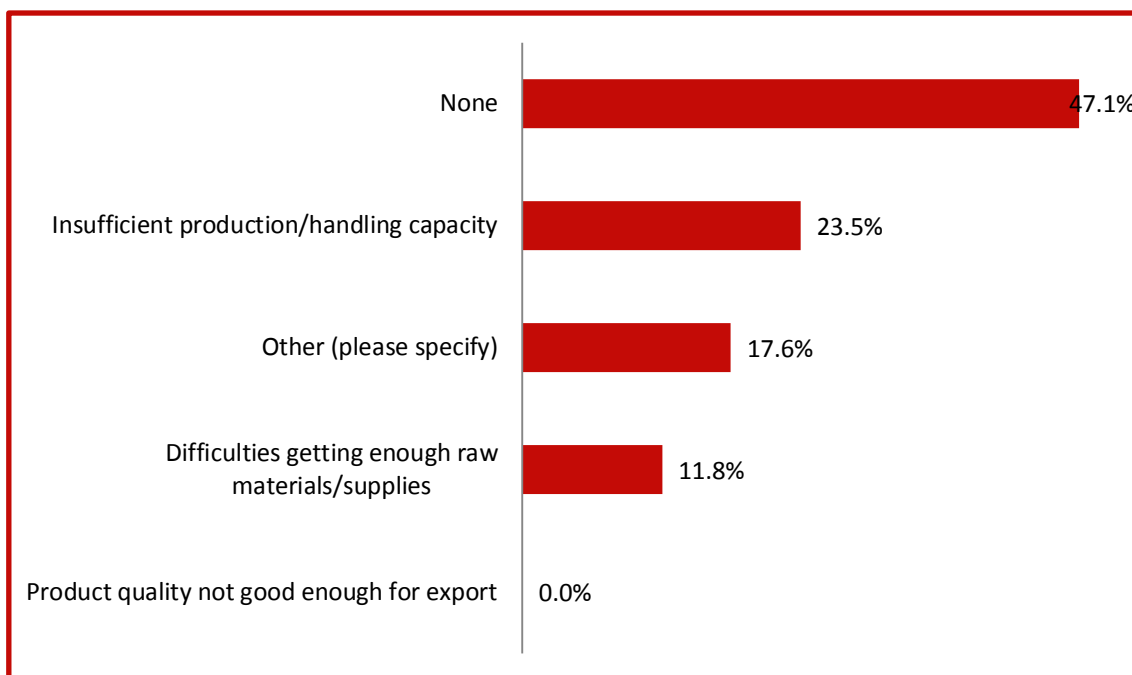
Answer Options	Response Share	Response Count
Availability of working capital	23.5%	4
Cost of finance	5.9%	1
Currency risk	35.3%	6
None	41.2%	7
Other (please specify)	11.8%	2
• Networks		
• Price of similar products from overseas suppliers - often due to volumes manufactured		
Answered question		17
Skipped question		19

Source: Sunshine NEC Business Intentions Survey

Question 9: What are the main production-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. Almost one-half of those surveyed (47%) indicated they have not experienced any production-related barriers to exporting. Those who have experienced such barriers attribute this to insufficient production/handling capacity (24%) and difficulties getting enough raw materials/supplies (12%).

Figure 8.12: Production-related barriers to exporting (multi-purpose)



Source: Sunshine NEC Business Intentions Survey

Table 8.8: Production-related barriers to exporting (multi-purpose)

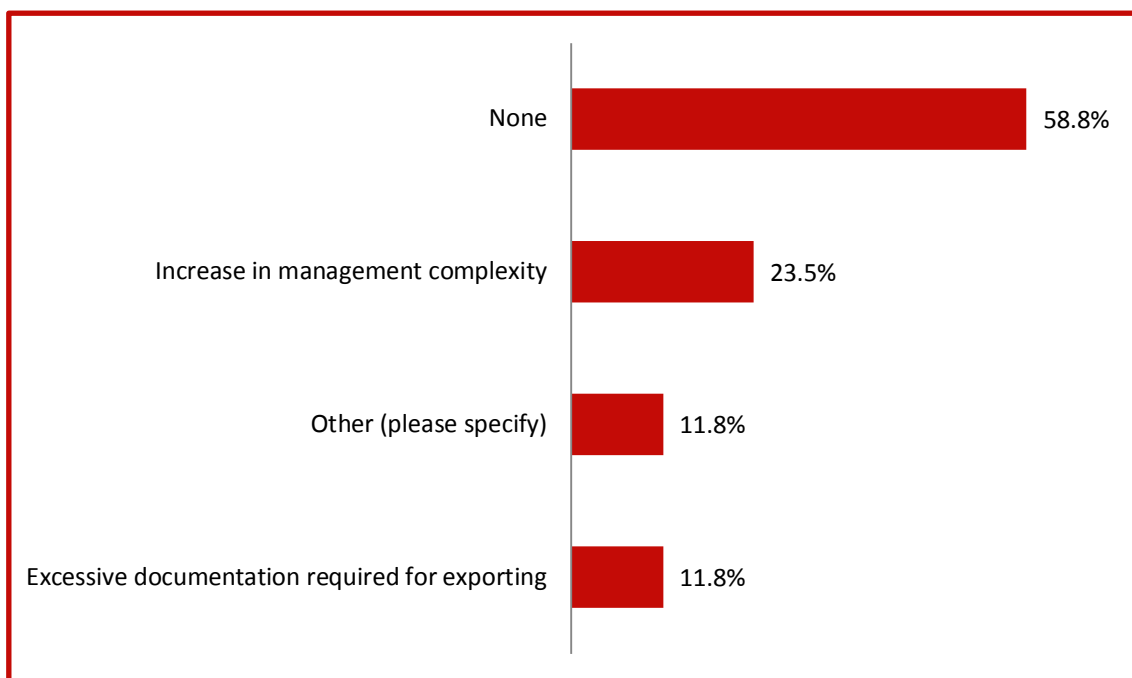
Answer Options	Response Share	Response Count
Insufficient production/handling capacity	23.5%	4
Difficulties getting enough raw materials/supplies	11.8%	2
Product quality not good enough for export	0.0%	0
None	47.1%	8
Other (please specify)	17.6%	3
• Costs: wages, tax		
• Market conditions and demand		
• Our costs compared to other countries esp. Asia		
Answered question		17
Skipped question		19

Source: Sunshine NEC Business Intentions Survey

Question 10: What are the main logistics-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of businesses surveyed (59%) indicated they have not experienced any logistics-related barriers to exporting. Of those who experience such barriers, 24% attribute this to an increase in management complexity and 12% highlight excessive documentation associated with exporting.

Figure 8.13: Logistics-related barrier to exporting



Source: Sunshine NEC Business Intentions Survey

Table 8.9: Logistics-related barrier to exporting (multi-purpose)

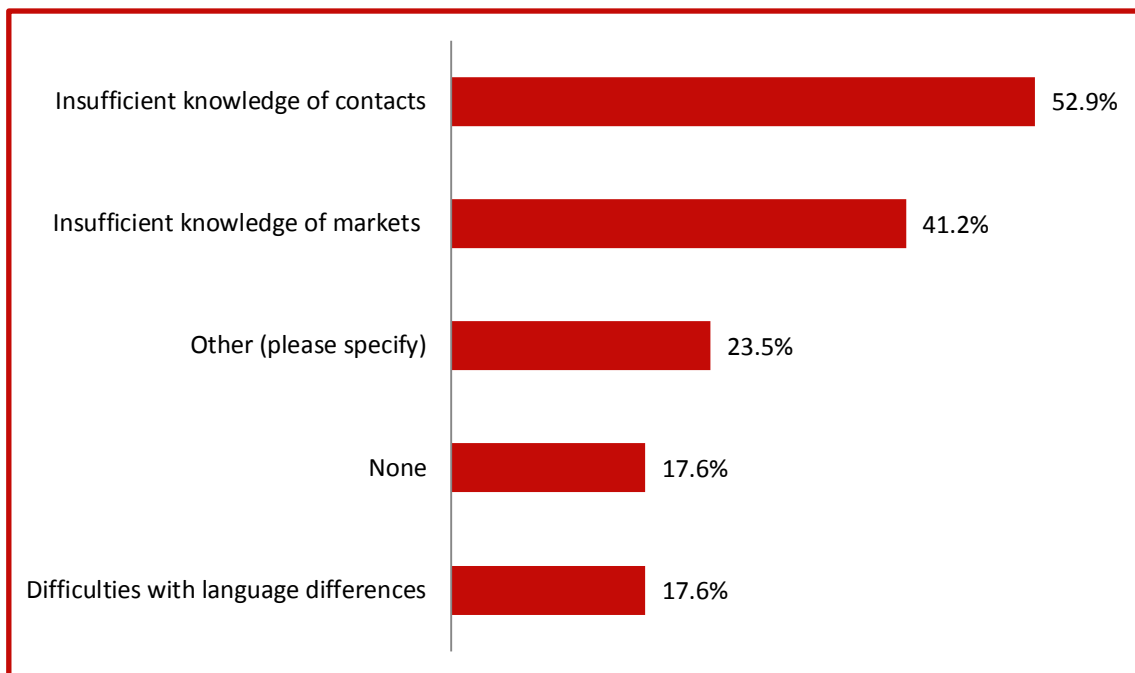
Answer Options	Response Share	Response Count
Excessive documentation required for exporting	11.8%	2
Increase in management complexity	23.5%	4
None	58.8%	10
Other (please specify)	11.8%	2
• Cost of international air freight		
• Access roads		
Answered question		17
Skipped question		19

Source: Sunshine NEC Business Intentions Survey

Question 11: What are the main market-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents (82%) note one or more market-related barriers to exporting. The main market-related barriers are an insufficient knowledge of contacts (53%) and insufficient knowledge of markets (41%). Only 18% of businesses indicated they have not experienced any market-related barriers to exporting.

Figure 8.14: Market-related barriers to exporting (multi-purpose)



Source: Sunshine NEC Business Intentions Survey

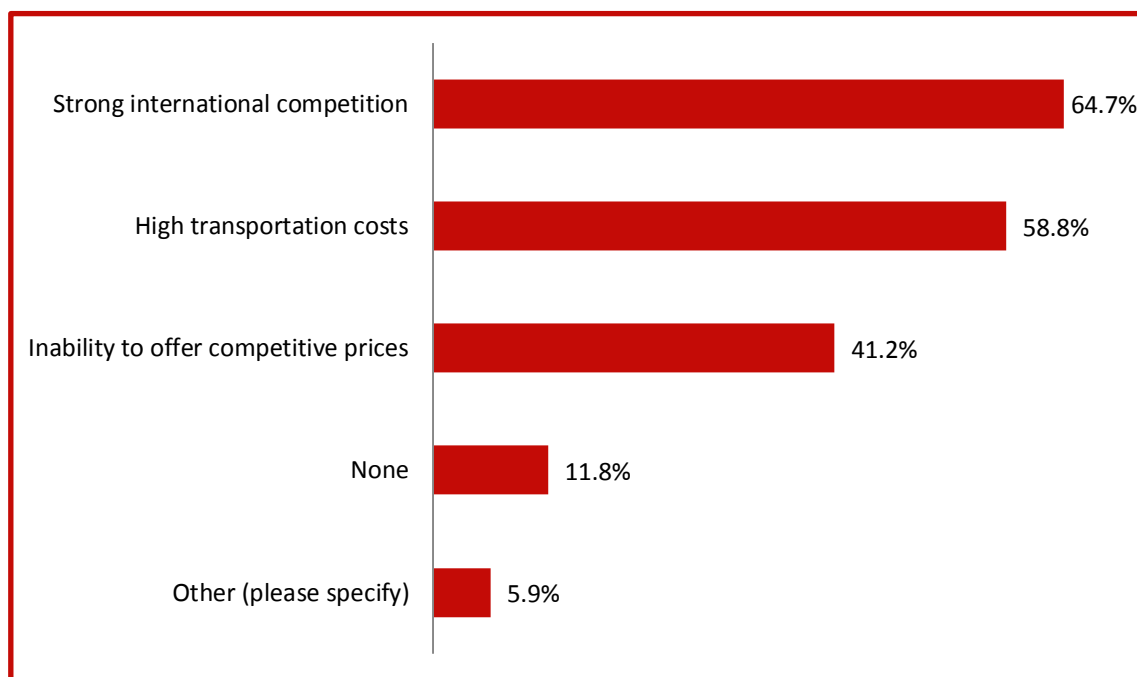
Table 8.10: Market-related barriers to exporting (multi-purpose)

Answer Options	Response Share	Response Count
Insufficient knowledge of markets	41.2%	7
Insufficient knowledge of contacts	52.9%	9
Difficulties with language differences	17.6%	3
None	17.6%	3
Other (please specify)	23.5%	4
• Networks		
• High labour costs		
• Costs		
• Demand		
Answered question		17
Skipped question		19

Source: Sunshine NEC Business Intentions Survey

Question 12: What are the main competition-related barriers to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority of respondents noted the main competition-related barriers to exporting are strong international competition (65%), high transportation costs (59%), and an inability to offer competitive prices (41%). Only a small share of respondents indicated “no” competition-related barriers to exporting (18%).

Figure 8.15: Competition-related barriers to exporting (multi-purpose)

Source: Sunshine NEC Business Intentions Survey

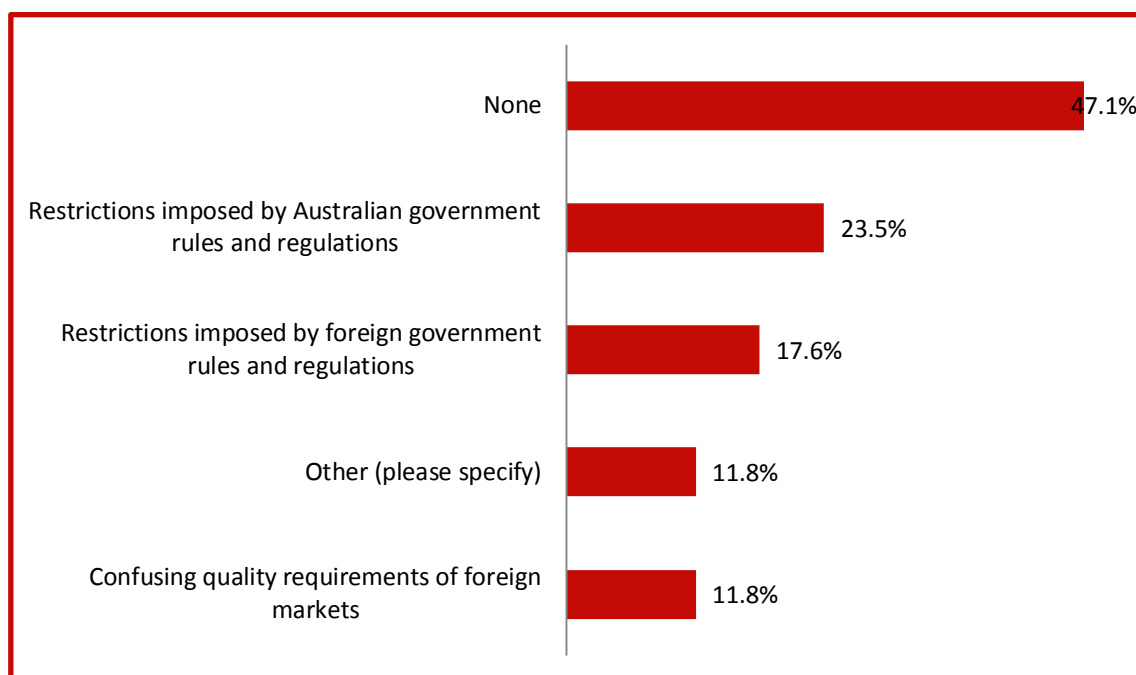
Table 8.11: Competition-related barriers to exporting

Answer Options	Response Share	Response Count
Strong international competition	64.7%	11
Inability to offer competitive prices	41.2%	7
High transportation costs	58.8%	10
None	11.8%	2
Other (please specify)	5.9%	1
• Importers costs		
Answered question		17
Skipped question		19

Source: Sunshine NEC Business Intentions Survey

Question 13: What are the main regulatory impediments to exporting that face your business?

The survey allowed respondents to select more than one answer. The majority did not any regulatory impediments to exporting (47%), while others noted the restrictions imposed by Australian government rules and regulations (24%), and restrictions imposed by foreign government rules and regulations (18%).

Figure 8.16: Regulatory impediments to exporting

Source: Sunshine NEC Business Intentions Survey

Table 8.12: Regulatory impediments to exporting (multi-purpose)

Answer Options	Response Share	Response Count
Restrictions imposed by foreign government rules and regulations	17.6%	3
Confusing quality requirements of foreign markets	11.8%	2
Restrictions imposed by Australian government rules and regulations	23.5%	4
None	47.1%	8
Other (please specify)	11.8%	2
• cost of NICNAS registration of all raw materials		
• Exporting performed from main company hub		
Answered question		17
Skipped question		19

Source: Sunshine NEC Business Intentions Survey

Question 14: Are there any other barriers to exporting that face your business e.g. human resources related?

The majority of businesses surveyed skipped this question, and those who responded indicated no barriers to exporting, except for few who noted cost of imports and lack of understanding of foreign markets.

Table 8.13: Other barriers that businesses face

Number	Response Text
1	NZ we consider as "local", however other Asian markets we are not focused on as other parts of our organisation are responsible for Asia. However it does mean we are missing Asian export opportunities. Need to grow our own understanding of Asian markets and contacts.
2	Our exporting percentage is quite small - perhaps 1% so there have been no real 'barriers' we have had to deal with.
3	none
4	Cost of imports is the main factor followed by operational costs with labour and packaging.
5	No

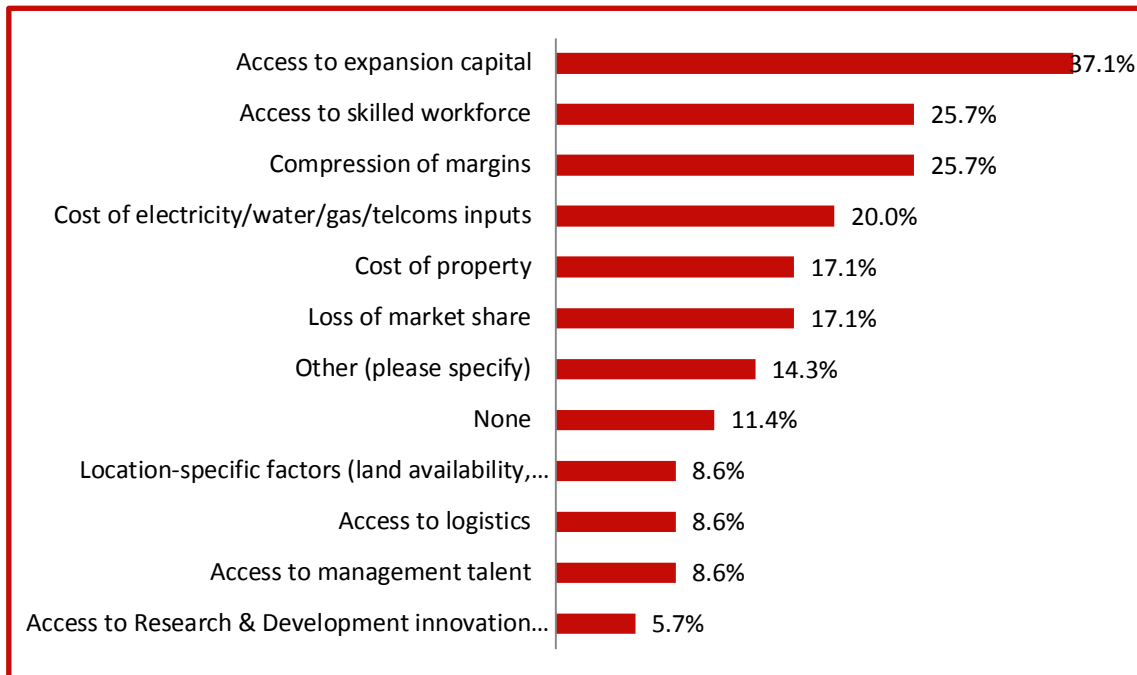
Source: Sunshine NEC Business Intentions Survey

8.4 The Future of your Business

Question 15: What are the main barriers to potential expansion (if any)?

The survey allowed respondents to select more than one answer. Businesses surveyed identified the main barriers to potential expansion are related to access to expansion capital (37%), access to skilled workforce (26%), compression of margins (26%), cost of utilities (20%), among other barriers.

Figure 8.17: Main barriers to potential expansion (multi-purpose)



Source: Sunshine NEC Business Intentions Survey

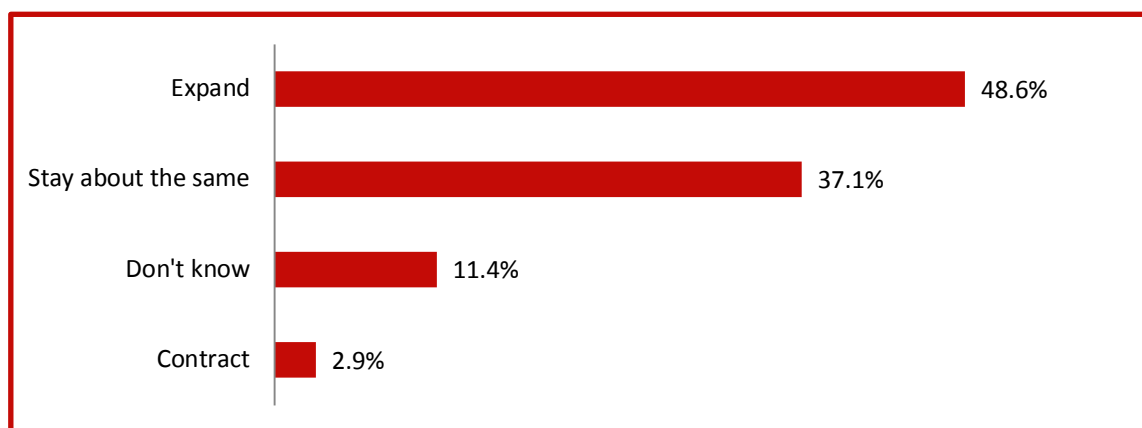
Table 8.14: Main barriers to potential expansion (multi-purpose)

Answer Options	Response Share	Response Count
Access to expansion capital	37.1%	13
Loss of market share	17.1%	6
Compression of margins	25.7%	9
Access to management talent	8.6%	3
Access to skilled workforce	25.7%	9
Access to logistics	8.6%	3
Access to Research & Development innovation suppliers	5.7%	2
Cost of electricity/water/gas/telecoms inputs	20.0%	7
Cost of property	17.1%	6
Location-specific factors (land availability, conflict with surrounding uses etc)	8.6%	3
None	11.4%	4
Other (please specify)		
<ul style="list-style-type: none"> • Access to government contracts • Cost of labour • Declining manufacturing Industry in Australia, so lower customers demand. EPA regulations • Shrinking market - we supply to manufacturing & infrastructure type projects • Restrictions, conditions and long delays for council permits 	14.3%	5
Answered question		35
Skipped question		1

Source: Sunshine NEC Business Intentions Survey

Question 16: In the next 5 years do you anticipate that the number of employees on site will expand or contract?

Almost one-half of businesses surveyed (49%) anticipate the number of employees on-site will expand in the next 5 years, while 37% anticipate it will stay about the same, and 3% anticipate it will contract in number of employees over the next 5 years. Some (11%) identified no barriers to expansion.

Figure 8.18: Number of employees on site in the next 5 years

Source: Sunshine NEC Business Intentions Survey

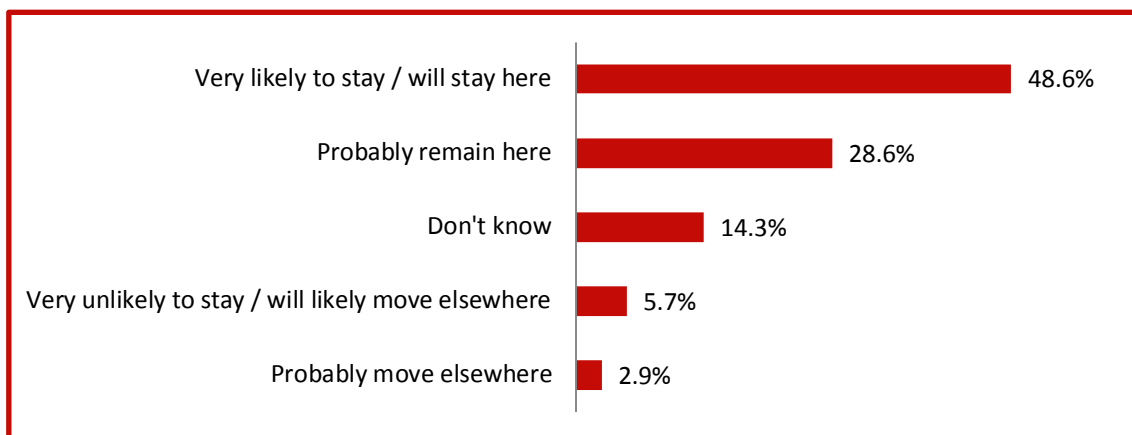
Table 8.15: Number of employees on site in the next 5 years

Answer Options	Response Share	Response Count
Expand	48.6%	17
Contract	2.9%	1
Stay about the same	37.1%	13
Don't know	11.4%	4
Answered question		35
Skipped question		1

Source: Sunshine NEC Business Intentions Survey

Question 17: How likely is your business to stay in its current location over the next 5 years?

A large majority (78%) of businesses surveyed indicated they are “very likely” (49%) or will “probably” (29%) stay in their current location over the next 5 years. Approximately one-in-ten (9%) indicated they will “very likely” (6%) or “probably” (3%) move elsewhere.

Figure 8.19: Likelihood of business staying in its current location over the next 5 years

Source: Sunshine NEC Business Intentions Survey

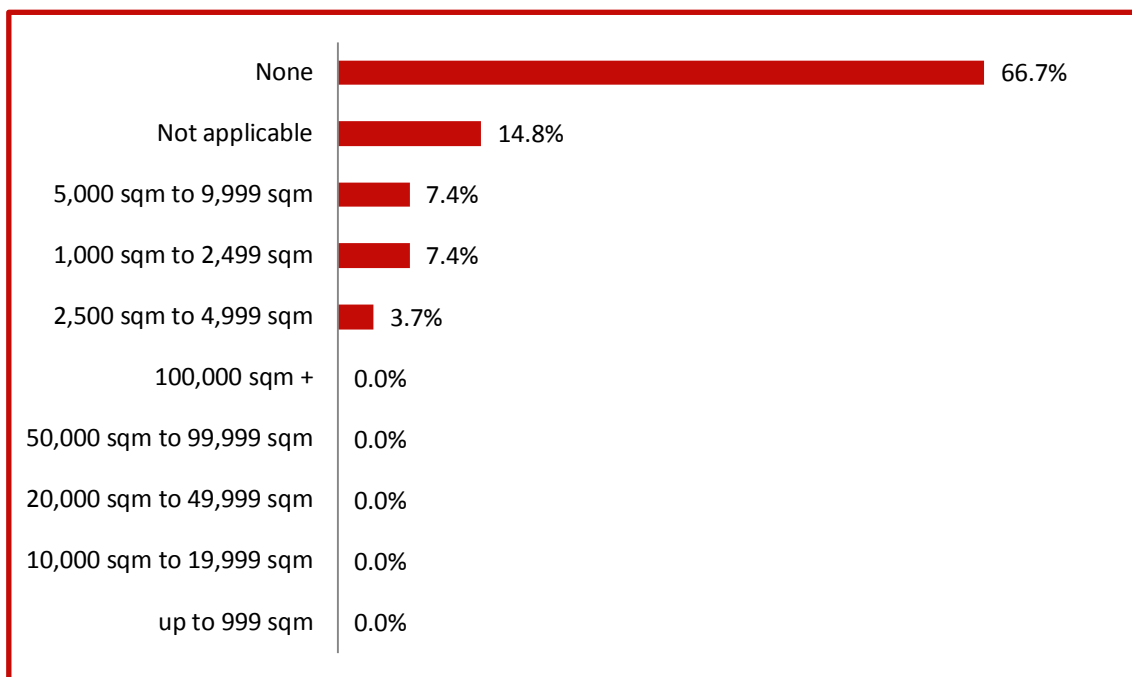
Table 8.16: Number of employees on site in the next 5 years

Answer Options	Response Share	Response Count
Very likely to stay / will stay here	48.6%	17
Probably remain here	28.6%	10
Probably move elsewhere	2.9%	1
Very unlikely to stay / will likely move elsewhere	5.7%	2
Don't know	14.3%	5
Answered question		35
Skipped question		1

Source: Sunshine NEC Business Intentions Survey

Question 18: If your business is likely to stay in this location over the next 5 years, what additional land area will be required for expansion purposes?

Two-thirds of respondents (67%) indicated they are likely to stay in the current location over the coming 5 years and will not require additional land for expansion purposes. Other businesses generally require between 1,000m² to 9,999 m² of land (17%).

Figure 8.20: Additional land area required for expansion purposes

Source: Sunshine NEC Business Intentions Survey

Table 8.17: Additional land area required for expansion purposes

Answer Options	Response Share	Response Count
None	66.7%	18
up to 999 sqm	0.0%	0
1,000 sqm to 2,499 sqm	7.4%	2
2,500 sqm to 4,999 sqm	3.7%	1
5,000 sqm to 9,999 sqm	7.4%	2
10,000 sqm to 19,999 sqm	0.0%	0
20,000 sqm to 49,999 sqm	0.0%	0
50,000 sqm to 99,999 sqm	0.0%	0
100,000 sqm +	0.0%	0
Not applicable	14.8%	4
Answered question		27
Skipped question		9

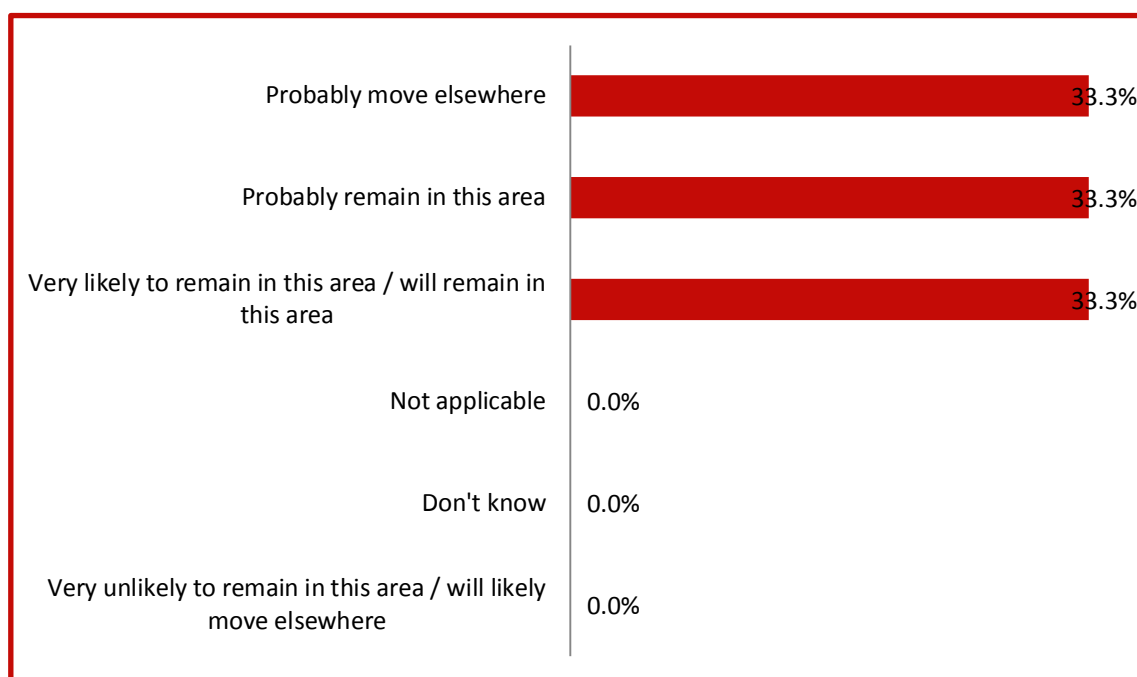
Source: Sunshine NEC Business Intentions Survey

8.5 Alternative Locations

Question 19: If your business was to move from its current location, how likely is the business to remain in the Sunshine National Employment Cluster?

The majority of businesses surveyed skipped this question, as they had previously indicated their business was unlikely to move. Of the three responses received, one business indicated they will “very likely” remain in the area and another indicated they will “probably” remain in this area, with the third business indicating they will “probably” move elsewhere.

Figure 8.21: Likelihood of business to remain in the Sunshine NEC



Source: Sunshine NEC Business Intentions Survey

Table 8.18: Likelihood of business to remain in the Sunshine NEC

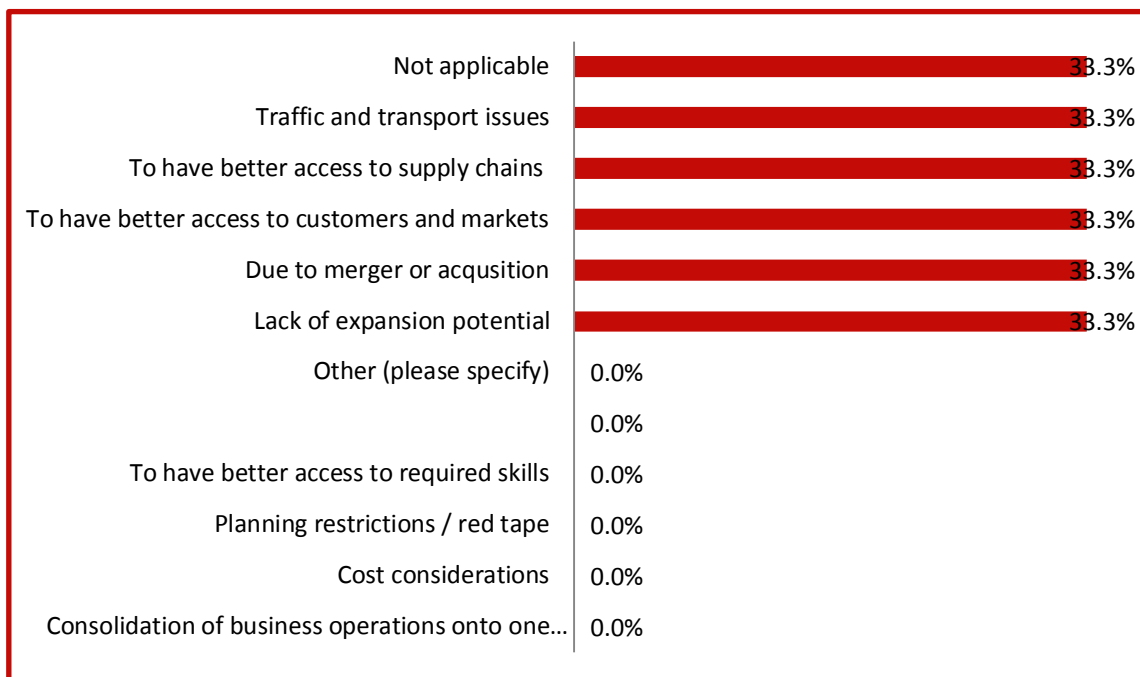
Answer Options	Response Share	Response Count
Very likely to remain in this area / will remain in this area	33.3%	1
Probably remain in this area	33.3%	1
Probably move elsewhere	33.3%	1
Very unlikely to remain in this area / will likely move elsewhere	0.0%	0
Don't know	0.0%	0
Not applicable	0.0%	0
Answered question		3
Skipped question		33

Source: Sunshine NEC Business Intentions Survey

Question 20: What would be your main reasons for moving out of the Sunshine National Employment Cluster?

The survey allowed respondents to select more than one answer. Reasons (all of equal weight) include a lack of expansion potential, traffic and transport issues, and relocation due to merger or acquisition, the need for better access to customers and markets, and better access to supply chains.

Figure 8.22: Reasons for moving out of the Sunshine NEC (multi-response)



Source: Sunshine NEC Business Intentions Survey

Table 8.19 Reasons for moving out of the Sunshine NEC (multi-response)

Answer Options	Response Share	Response Count
Consolidation of business operations onto one site	0.0%	0
Lack of expansion potential	33.3%	1
Cost considerations	0.0%	0
Planning restrictions / red tape	0.0%	0
Due to merger or acquisition	33.3%	1
To have better access to customers and markets	33.3%	1
To have better access to supply chains	33.3%	1
To have better access to required skills	0.0%	0
To be part of an industry cluster or closer to major organisations and institutions	0.0%	0
Traffic and transport issues	33.3%	1
Not applicable	33.3%	1
Other (please specify)	0.0%	0
Answered question		3
Skipped question		33

Source: Sunshine NEC Business Intentions Survey

**Question 21: What alternative locations would you seriously consider for your business?
List the suburbs/areas.**

The majority of respondents skipped this question. Those who responded suggest Laverton and Tooronga.

Table 8.20: Alternative business locations

Number	Location:
1	Laverton
2	Tooronga
Answered question	2
Skipped question	34

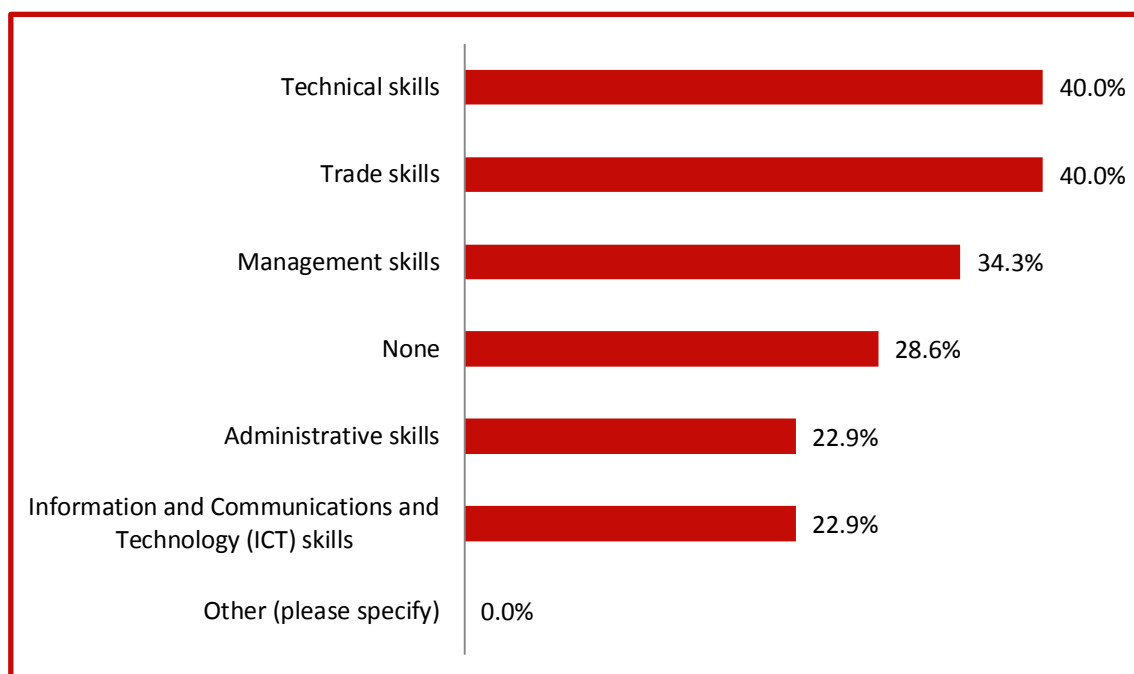
Source: Sunshine NEC Business Intentions Survey

8.6 Skills

Question 22: Thinking about your workforce over the next 5 years, what particular skill shortages may affect your business and require up skilling?

The survey allowed respondents to select more than one answer. The main skills requirements for over the next 5 years are technical skills (40%), trade skills (40%), and management skills (34%). Significantly, many respondents (29%) indicated that no particular skills are likely to be in short supply over the next five years.

Figure 8.21: Skill shortages that may require up-skilling over the next 5 years (multi-response)



Source: Sunshine NEC Business Intentions Survey

Table 8.21: Skill shortages that may require upskilling over the next 5 years (multi-response)

Answer Options	Response Share	Response Count
Trade skills	40.0%	14
Technical skills	40.0%	14
Information and Communications and Technology (ICT) skills	22.9%	8
Administrative skills	22.9%	8
Management skills	34.3%	12
None	28.6%	10
Other (please specify)	0.0%	0
Answered question		35
Skipped question		1

Source: Sunshine NEC Business Intentions Survey

8.7 Impact of Infrastructure / Investment Initiatives

Question 23: To what extent would improved road infrastructure support your business and encourage you to stay in the precinct?

The majority of respondents (57%) indicated that improved road infrastructure would “greatly increase” their intention to stay (31%) or “moderately increase” (26%) their intention to stay in the precinct. The balance (43%) indicated it would have “no impact” on their intention to stay.

Table 8.22: Impact of improved road infrastructure on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	11	9	15	2.11	35
Per cent	31%	26%	43%		
Answered question					35
Skipped question					1

Source: Sunshine NEC Business Intentions Survey

Question 24: To what extent would improved public transport infrastructure support your business and encourage you to stay in the precinct?

The majority of businesses (54%) indicated that improved public transport infrastructure would have “no impact” on their intention to stay, while the balance indicated that it would

“greatly increase” their intention to stay (23%) or “moderately increase” their intention to stay (23%).

Table 8.23: Impact of improved public transport infrastructure on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	8	8	19	2.31	35
Per cent	23%	23%	54%		
Answered question					35
Skipped question					1

Source: Sunshine NEC Business Intentions Survey

Question 25: To what extent would improved broadband (e.g. access to the National Broadband Network) support your business and encourage you to stay in the precinct?

A significant majority of respondents (72%) of businesses indicated that improved broadband would “greatly increase” or “moderately increase” their intention to stay. The balance (29%) indicated it would have “no impact” on their intention to stay.

Table 8.24: Impact of improved broadband on business and intention to stay

Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	16	9	10	1.83	35
Per cent	46%	26%	29%		
Answered question					35
Skipped question					1

Source: Sunshine NEC Business Intentions Survey

Question 26: To what extent would improved utilities infrastructure (e.g. gas, electricity, water, sewerage) support your business and encourage you to stay in the precinct?

A majority of businesses (51%) indicated that improved utilities infrastructure would “greatly increase” or “moderately increase” their intention to stay. The balance (49%) indicating it would have “no impact” on their decision to stay.

Table 8.25: Impact of improved utilities infrastructure on business and intention to stay

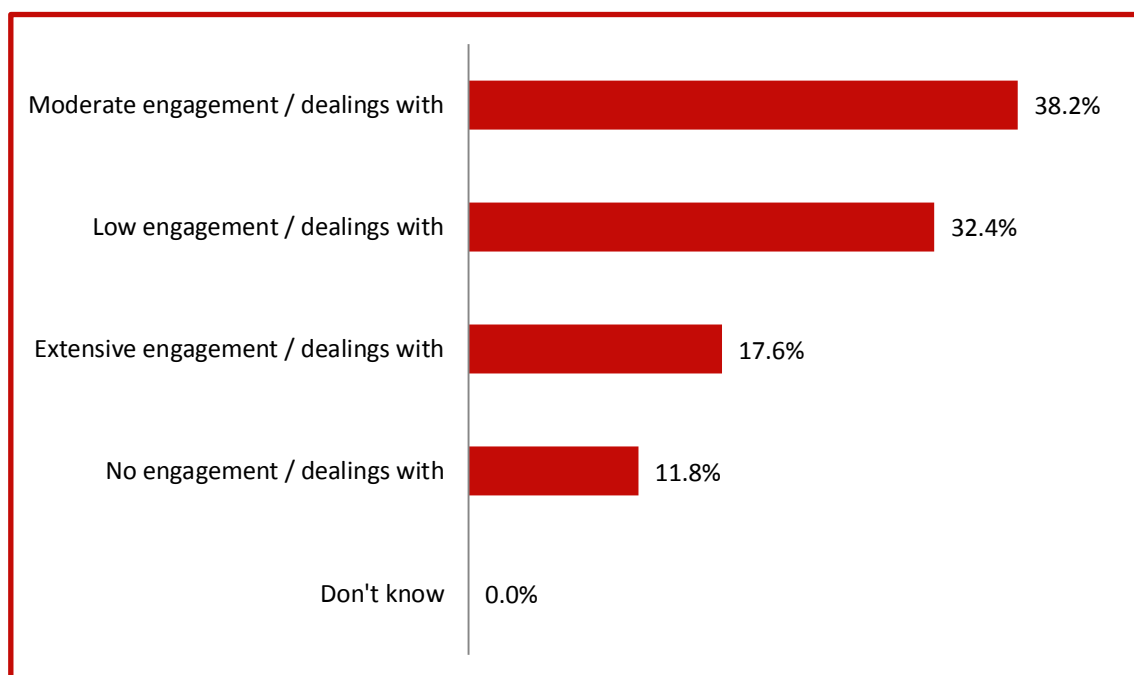
Answer Options	Would greatly increase our intention to stay	Would moderately increase our intention to stay	No impact on our intention to stay	Rating Average	Response Count
No. of responses	7	11	17	2.29	35
Per cent	20%	31%	49%		
Answered question					35
Skipped question					1

Source: Sunshine NEC Business Intentions Survey

8.8 Building Relationships

Question 27: How would you rate the extent of relationships your business has with other businesses, services or institutions in the precinct?

The majority of respondents (56%) indicated that they have an “extensive” or “moderate” level of engagement with other businesses, services and institutions in the precinct. The balance have either a “low” level of engagement (32%) or no engagement at all (12%).

Figure 8.22: Extent of relationships the business has with other businesses, services or institutions in the precinct.

Source: Sunshine NEC Business Intentions Survey

Table 8.26: Extent of relationships the business has with other businesses, services or institutions in the precinct.

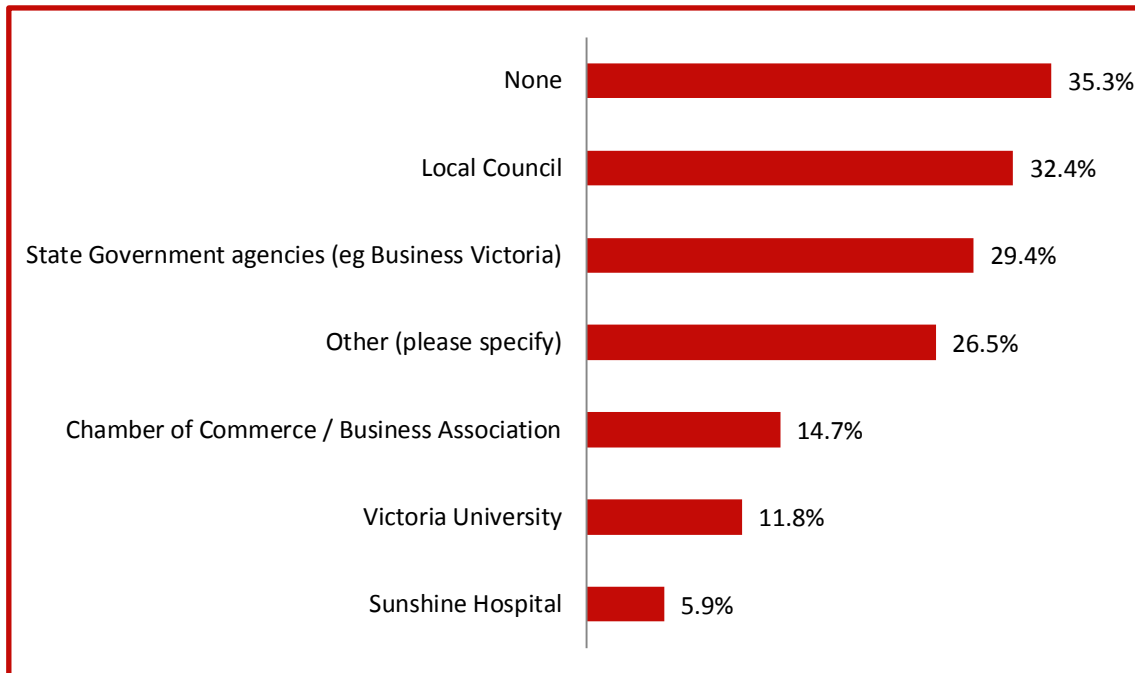
Answer Options	Response Share	Response Count
Extensive engagement / dealings with	17.6%	6
Moderate engagement / dealings with	38.2%	13
Low engagement / dealings with	32.4%	11
No engagement / dealings with	11.8%	4
Don't know	0.0%	0
Answered question		34
Skipped question		2

Source: Sunshine NEC Business Intentions Survey

Question 28: Which are the main businesses or institutions in the precinct that your business currently engages or collaborates with?

The survey allowed respondents to select more than one answer. The businesses or institutions that businesses currently engage or collaborate with most frequently are Local Council (32%), State Government agencies (29%) and Chamber of Commerce (15%). Importantly, over one-third of businesses (35%) indicated they do not collaborate or engage with any other business or institutions in the precinct.

Figure 8.23: Main businesses or institutions that the business is currently engaging or collaborating with (multi-purpose)



Source: Sunshine NEC Business Intentions Survey

Table 8.27: Main businesses or institutions that the business is currently engaging or collaborating with (multi-purpose)

Answer Options	Response Share	Response Count
Local Council	32.4%	11
State Government agencies (e.g. Business Victoria)	29.4%	10
Sunshine Hospital	5.9%	2
Victoria University	11.8%	4
Chamber of Commerce / Business Association	14.7%	5
None	35.3%	12
Other (please specify)		
<ul style="list-style-type: none"> Education sector. Government/Catholic / Independent also Universities and TAFE Other businesses Other businesses clustered at Gate 3 Ballarat Rd site Toyota Kitchen Cabinet supplier; Auto Accessories; Auto Repairs; Powder Coating; Metal Recyclers Retail stores Customers in all types of business Radiology Services, pharmacy services, allied health services Banking Institutions 	26.5%	9
Answered question		34
Skipped question		2
Source: Sunshine NEC Business Intentions Survey		

Question 29: What else, if anything, would make the precinct a more attractive location for your business in the future?

The challenges that businesses would like to overcome relate to improved accessibility, parking, broadband and Wi-Fi, freight costs, and planning restrictions.

Table 8.28: Challenges that businesses would like to overcome

Number	Response Text	
1	More footpaths/bicycle paths	
2	Improved road access into Berkshire road from Ayton Street or a new access road and improved service amenities (hotels, restaurants etc)	
3	Freight costs remain an issue to other states (WA in particular) and NZ. But this is not a function of current location.	
4	More parking restrictions to prevent streets being blocked up.	
5	ISP (NBN) would be good. Telstra has just upgraded us from Dial-Up / Cable (?) to ADSL2 - Pretty poor for the 21st Century	
6	Parking / Wi-Fi/ Place activation	
7	Keep it a business area and stop giving permits to community, religious and non-commercial entities	
8	Improved accessibility as roads to our centre are currently cordoned off	
9	Warehouses available at reasonable cost	
10	The shopping precinct needs to be cleaned up. More parking spaces are required. The area needs to be better lit up at night.	
11	Remove the Heritage Overlay	
12	Effective policing	
13	Would like to see Sunshine become a very prosperous town in the west	
Answered question		13
Skipped question		23

Source: Sunshine NEC Business Intentions Survey

8.9 Conclusions

1. Businesses chose to locate in the Sunshine NEC principally due to proximity to businesses clusters, or organisations and institutions (22%), land availability (16%), and cost considerations (14%).
2. Limitations or drawbacks of the location are lack of accessibility to public transport (33%) and distance from senior management place of residence (22%)
3. A total of 40% of businesses surveyed indicated the precinct had a poor reputation, while a lack safety and security is regarded by 47% of respondents as the main limitation of doing business in Sunshine NEC.
4. Only 28% of businesses in the Sunshine NEC currently export, with a further 22% of businesses interested in exporting. Businesses not currently exporting note that the main barrier is related to the high level of competition internationally.
5. A lack of access to expansion capital (37%) is the main barrier to expansion for businesses located in the Sunshine NEC.

6. Nearly half of businesses surveyed (49%) indicated they are very likely/ will remain in the Sunshine NEC over the coming 5 years.
7. Approximately half the businesses surveyed in the Sunshine NEC (46%) would be greatly enticed to stay in the precinct through improved broadband.
8. Technical skills (40%) and trade skills (40%) are the main upskilling requirements identified over the next 5 years for Sunshine NEC businesses.
9. The majority of Sunshine NEC businesses have low to moderate levels of engagement (71% combined) with other businesses, services or institutions in the precinct.

9 MONASH NATIONAL EMPLOYMENT CLUSTER - URBIS FINDINGS

This section details the findings from a business survey included as part of the *Monash National Employment Cluster (NEC) Economic and Business Intentions* study prepared by Urbis on behalf of the MPA in 2014.

With regard to the business survey findings (which included some comparable questions to this present study), the following points are noted:

- Just over one-half of the business respondents were from the following core sectors: manufacturing (20%), wholesale trade (14%), professional, scientific and technical services (12%), and construction industries (8%).
- Just over one-half of businesses surveyed are leasing their premises, with the average time at their current address being 10 years. The average lease expires in 4.7 years.
- About one-third of businesses currently export or are interested in exporting. These businesses face a number of barriers where they would benefit from support, such as information and training, and useful export business contacts to get started.
- While the majority of businesses in the Cluster remained the same size in the last two years, a small net increase in size overall has taken place. Large businesses with 100 employees or more are more likely to have expanded than contracted, while smaller businesses have tended to stay the same size. Looking forward, one-half of the businesses expect to stay about the same size in the next two years and two-fifths expect to grow; these are mostly smaller businesses and with growth expected in the vicinity of 25% or less.
- Significant movement of businesses is anticipated, with approximately 25% unlikely to be in their current location in the next five years, increasing to approximately 50% in the next 10 years. On a positive note, around two-thirds of those considering moving indicate they would be likely to remain in the Monash Employment Cluster. However, this suggests that in five years, around 10% of businesses surveyed are likely to have left the cluster within the next five years, increasing to around 17% in ten years.
- The key strengths of the Cluster include proximity to clients, accessibility by road, and size of the site/premises. Other strengths include proximity to staff place of residence and proximity to suppliers and the freeway, a good 'fit' of their business with the image/culture of the Cluster, and affordable occupancy costs.
- The main weakness is lack of public transport, particularly getting people into the cluster, rather than between nodes. Other weaknesses include lack of quality hotels/apartments, accessibility for customers and staff, lack of cycle paths, congested roads and lack of proximity to retail, leisure and entertainment facilities.

Overall, however, the research suggests that businesses are generally happy with their location in the Cluster.

Most businesses appear not to have high expectations of surrounding facilities and amenities, but they see the precinct as a place to work, and they have adapted to the circumstances in the area.

However, the level of amenity is more likely to be an issue when attracting new businesses to the Cluster.

APPENDIX A: BROADMEADOWS MAC

Question 32: Is this the Head/Principal Office for your business?

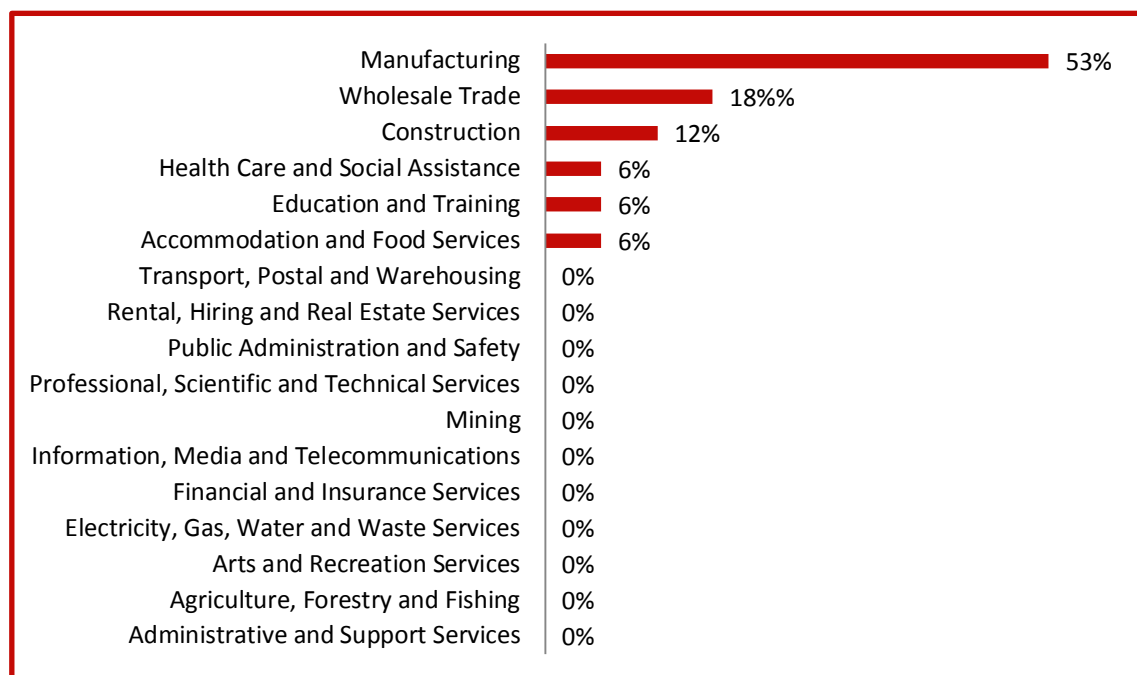
Table A.1: Head/Principal office

Answer Options	Response Share	Response Count
Yes	82.4%	14
No	17.6%	3
Answered question		17
Skipped question		6

Source: Broadmeadows MAC Business Intentions Survey

Question 33: Please select the core area of business undertaken at this site.

Figure A.1: Core area of business undertaken at the site



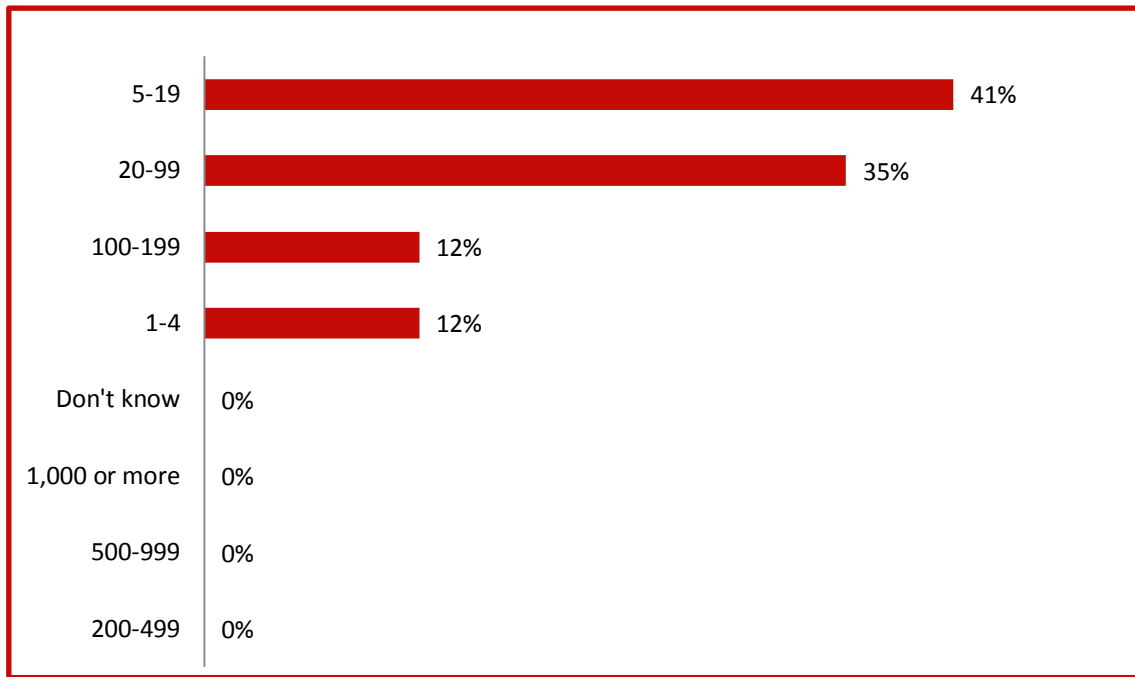
Source: Broadmeadows MAC Business Intentions Survey

Table A.2: Core area of business undertaken at the site

Answer Options	Response Share	Response Count
Accommodation and Food Services	5.9%	1
Administrative and Support Services	0.0%	0
Agriculture, Forestry and Fishing	0.0%	0
Arts and Recreation Services	0.0%	0
Construction	11.8%	2
Education and Training	5.9%	1
Electricity, Gas, Water and Waste Services	0.0%	0
Financial and Insurance Services	0.0%	0
Health Care and Social Assistance	5.9%	1
Information, Media and Telecommunications	0.0%	0
Manufacturing	52.9%	9
Mining	0.0%	0
Professional, Scientific and Technical Services	0.0%	0
Public Administration and Safety	0.0%	0
Rental, Hiring and Real Estate Services	0.0%	0
Transport, Postal and Warehousing	0.0%	0
Wholesale Trade	17.6%	3
Answered question		17
Skipped question		6
Source: Broadmeadows MAC Business Intentions Survey		

Question 34: How many employees (full-time, part-time and casual) work from this site?

Figure A.2: Number of employees that work from the site



Source: Broadmeadows MAC Business Intentions Survey

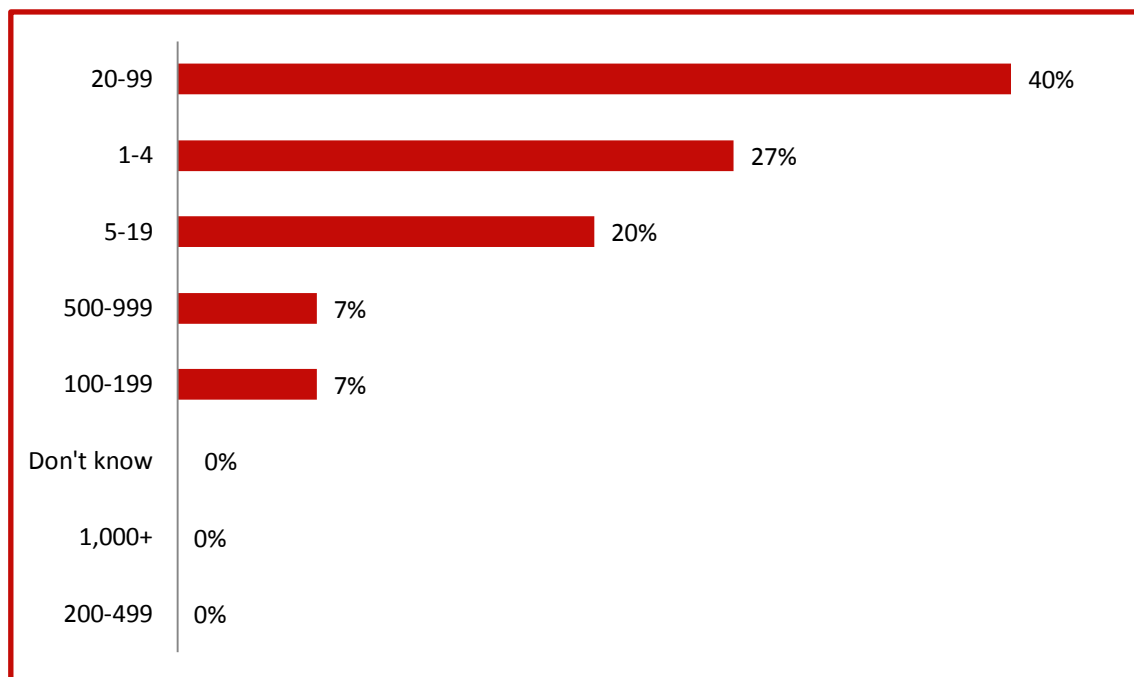
Table A.3: Number of employees that work from the site

Answer Options	Response Share	Response Count
1-4	11.8%	2
5-19	41.2%	7
20-99	35.3%	6
100-199	11.8%	2
200-499	0.0%	0
500-999	0.0%	0
1,000 or more	0.0%	0
Don't know	0.0%	0
Answered question		17
Skipped question		6

Source: Broadmeadows MAC Business Intentions Survey

Question 35: How many employees (full-time, part-time and casual) work for this business in total (including other locations)?

Figure A.3: Number of employees that work for this business in total



Source: Broadmeadows MAC Business Intentions Survey

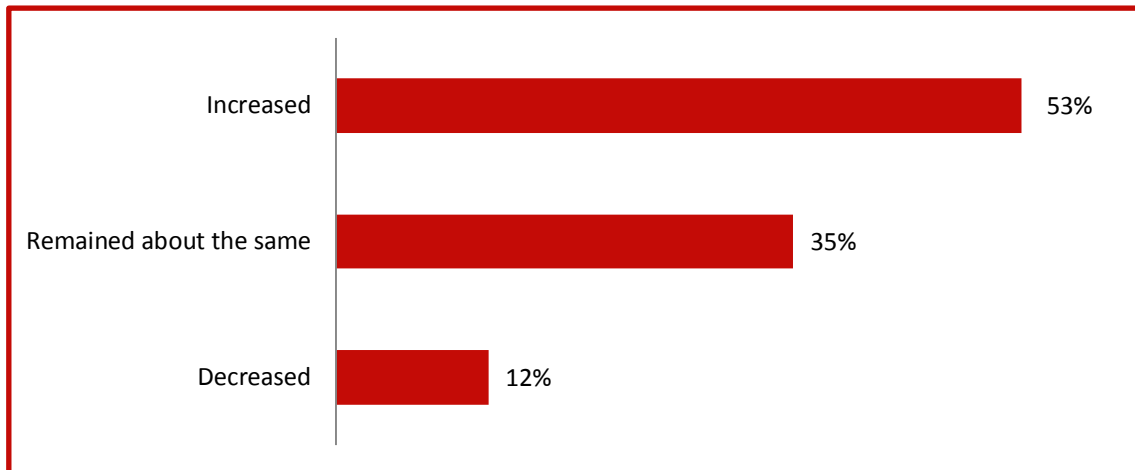
Table A.4: Number of employees that work for this business in total

Answer Options	Response Share	Response Count
1-4	26.7%	4
5-19	20.0%	3
20-99	40.0%	6
100-199	6.7%	1
200-499	0.0%	0
500-999	6.7%	1
1,000+	0.0%	0
Don't know	0.0%	0
Answered question		15
Skipped question		8

Source: Broadmeadows MAC Business Intentions Survey

Question36: Has the number of employees at this site changed in the last two years?

Figure A.4: Change in number of employees at the site in the last two years



Source: Broadmeadows Business Intentions Survey

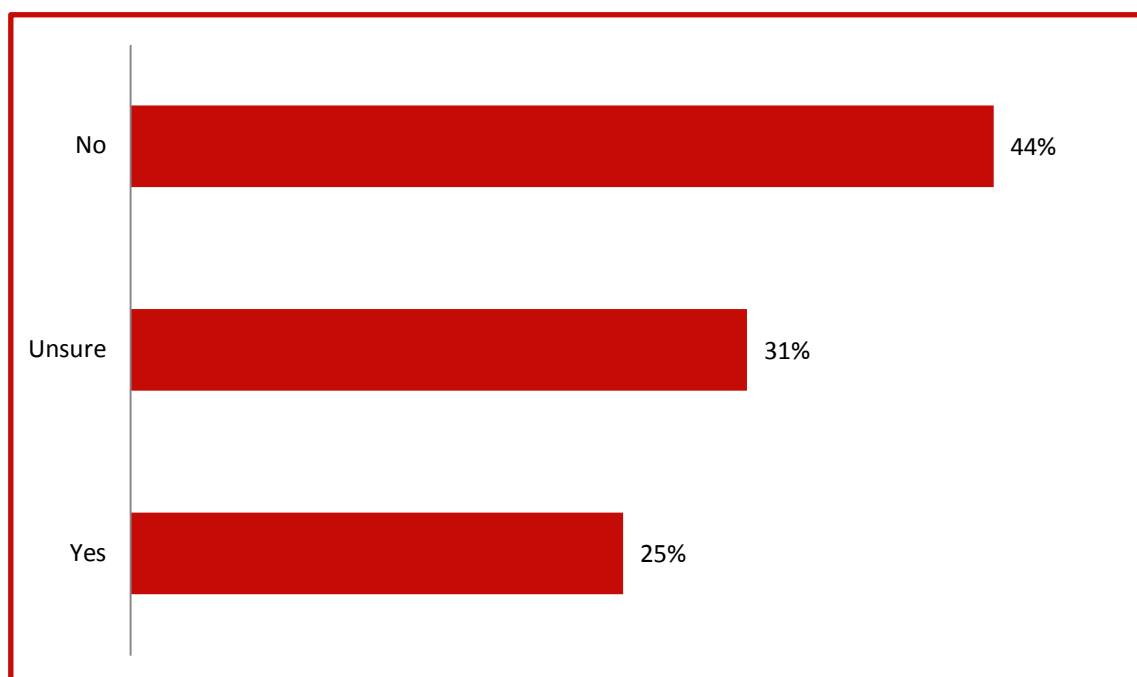
Table A.5: Change in number of employees at the site in the last two years

Answer Options	Response Share	Response Count
Increased	52.9%	9
Decreased	11.8%	2
Remained about the same	35.3%	6
Answered question		17
Skipped question		6

Source: Broadmeadows MAC Business Intentions Survey

Question 37: Have you received business development information or services from a Victorian Government Business Office over the past 12 months?

Figure A.5: Recipient of business development information or services from a Victorian Government Business Office over the past 12 months.



Source: Broadmeadows MAC Business Intentions Survey

Table A.6: Recipient of business development information or services from a Victorian Government Business Office over the past 12 months.

Answer Options	Response Share	Response Count
Yes	25.0%	4
No	43.8%	7
Unsure	31.3%	5
Answered question		16
Skipped question		7

Source: Broadmeadows MAC Business Intentions Survey

Question 38: If yes, please nominate which Victorian Government Business Office was your primary source of business development information or services

Table A.7: Nominated Victorian Government Business Office

Answer Options	Response Share	Response Count
Southern (Dandenong)	0.0%	0
Eastern (Ringwood)	0.0%	0
Northern (Bundoora)	100.0%	5
Western (Tottenham)	0.0%	0
Melbourne (CBD)	0.0%	0
Answered question		5
Skipped question		18

Source: Broadmeadows MAC Business Intentions Survey

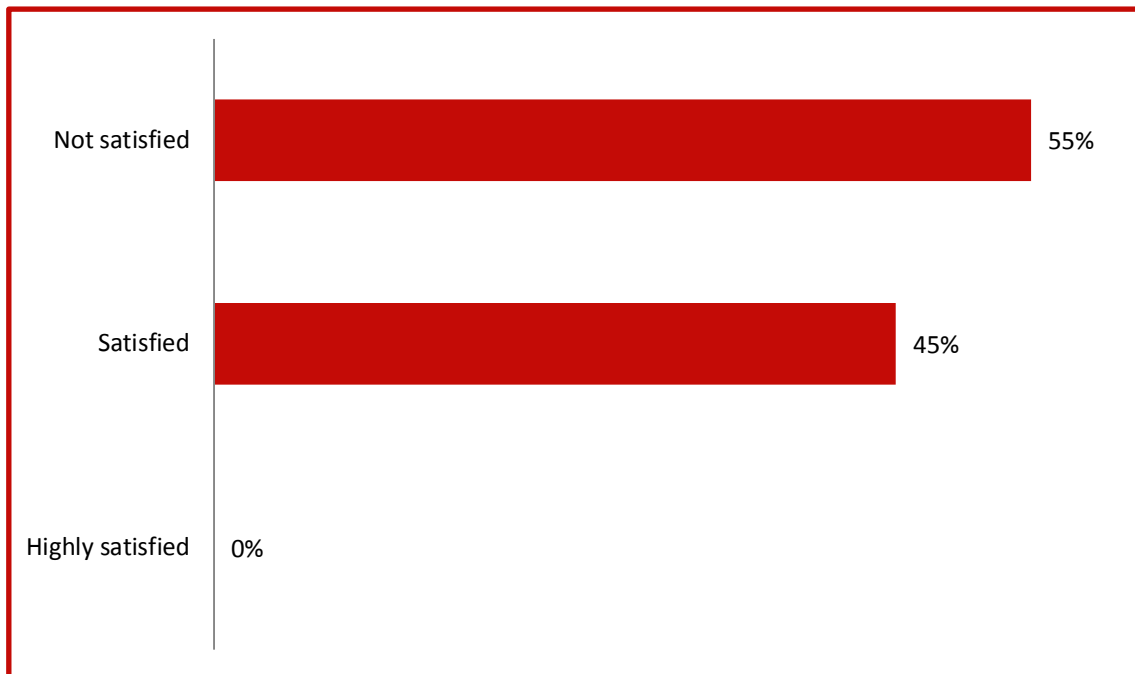
Question 39: Having received business development information or services from a Victorian Government Business Office, were you satisfied?

Table A.8: Satisfaction with business development information or services from a Victorian Government Business Office

Answer Options	Response Share	Response Count
Highly satisfied	0.0%	0
Satisfied	45.5%	5
Not satisfied	54.5%	6
Answered question		11
Skipped question		12

Source: Broadmeadows MAC Business Intentions Survey

Figure A.6: Satisfaction with business development information or services from a Victorian Government Business Office



Source: Broadmeadows MAC Business Intentions Survey

APPENDIX B: DANDENONG SOUTH NEC

Question 32: Is this site the Head/Principal Office for your business?

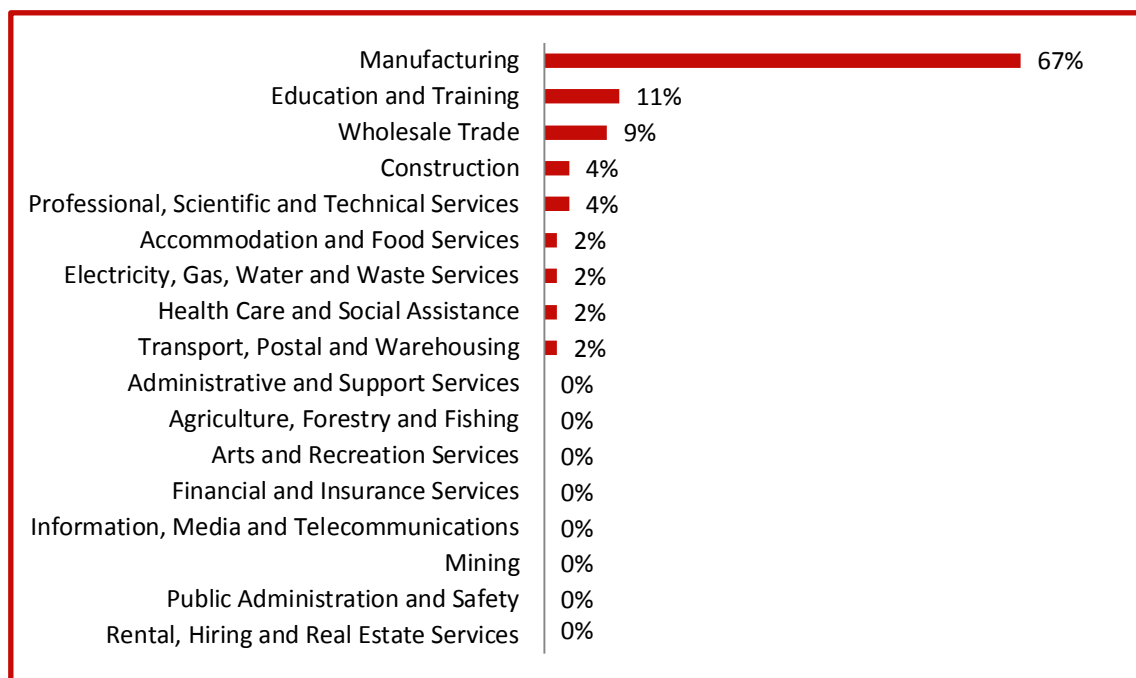
Table B.1: Head/Principal office

Answer Options	Response Share	Response Count
Yes	94.4%	51
No	5.6%	3
Answered question		54
Skipped question		13

Source: Dandenong South NEC Business Intentions Survey

Question 33: Please select the core area of business undertaken at this site.

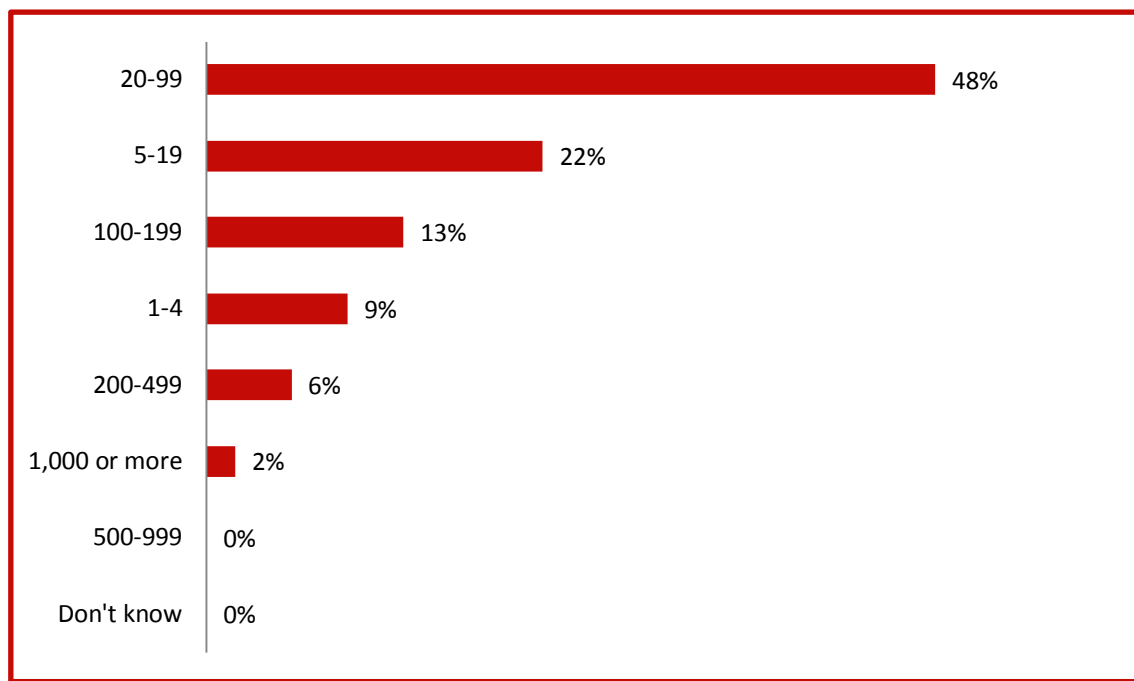
Figure B.1: Core area of business undertaken at the site (rounded)



Source: Dandenong South NEC Business Intentions Survey

Table B.2: Core area of business undertaken at the site

Answer Options	Response Share	Response Count
Accommodation and Food Services	1.8%	1
Administrative and Support Services	0.0%	0
Agriculture, Forestry and Fishing	0.0%	0
Arts and Recreation Services	0.0%	0
Construction	3.5%	2
Education and Training	10.5%	6
Electricity, Gas, Water and Waste Services	1.8%	1
Financial and Insurance Services	0.0%	0
Health Care and Social Assistance	1.8%	1
Information, Media and Telecommunications	0.0%	0
Manufacturing	66.7%	38
Mining	0.0%	0
Professional, Scientific and Technical Services	3.5%	2
Public Administration and Safety	0.0%	0
Rental, Hiring and Real Estate Services	0.0%	0
Transport, Postal and Warehousing	1.8%	1
Wholesale Trade	8.8%	5
Answered question		57
Skipped question		10
Source: Dandenong South NEC Business Intentions Survey		

Question 34: How many employees (full-time, part-time and casual) work from this site?**Figure B.2: Number of employees that work from the site**

Source: Dandenong South NEC Business Intentions Survey

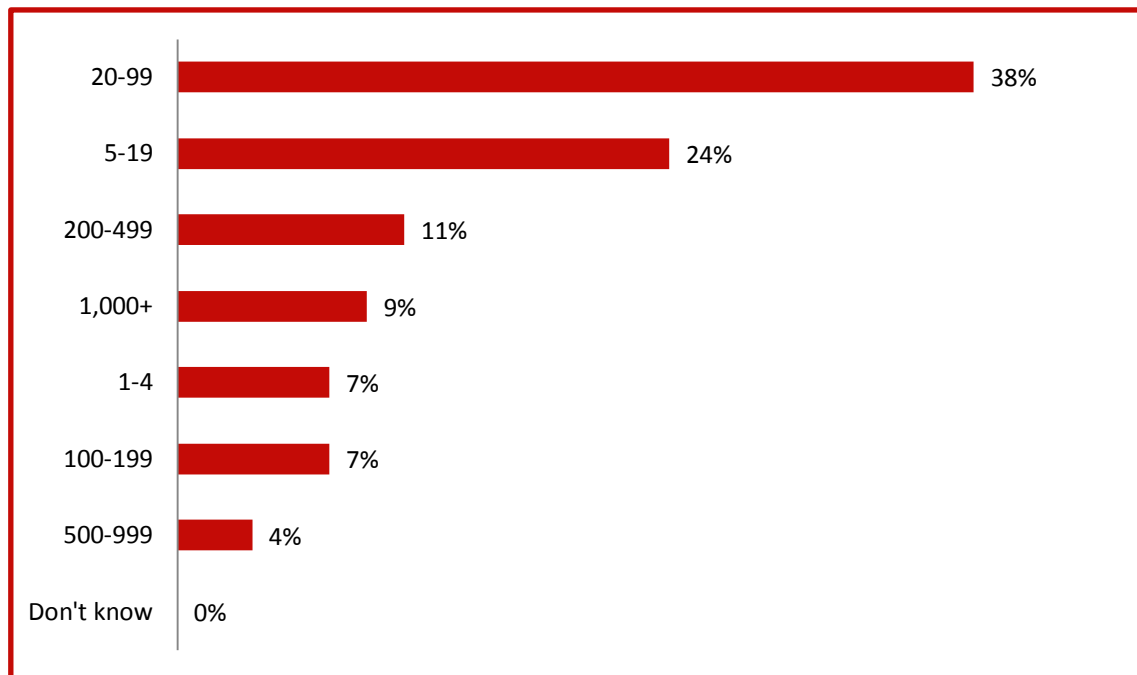
Table B.3: Number of employees that work from the site

Answer Options	Response Share	Response Count
1-4	9.3%	5
5-19	22.2%	12
20-99	48.1%	26
100-199	13.0%	7
200-499	5.6%	3
500-999	0.0%	0
1,000 or more	1.9%	1
Don't know	0.0%	0
Answered question		54
Skipped question		13

Source: Dandenong South NEC Business Intentions Survey

Question 35: How many employees (full-time, part-time and casual) work for this business in total (including other locations)?

Figure B.3: Number of employees that work for this business in total



Source: Dandenong South NEC Business Intentions Survey

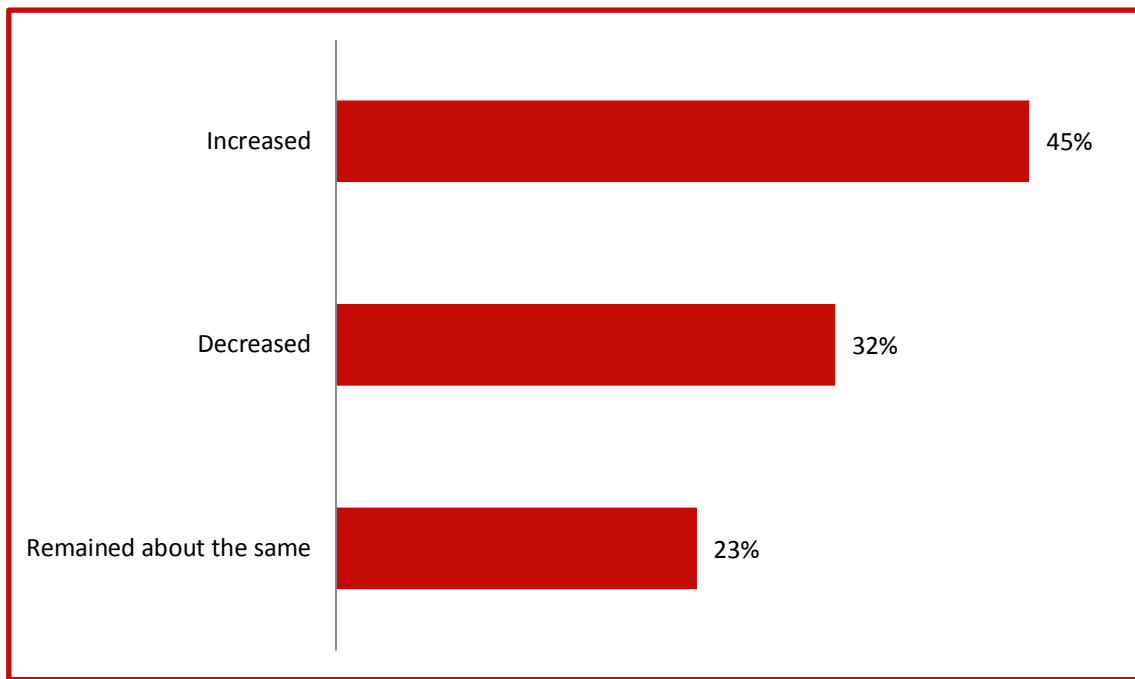
Table B.4: Number of employees that work for this business in total

Answer Options	Response Share	Response Count
1-4	7.3%	4
5-19	23.6%	13
20-99	38.2%	21
100-199	7.3%	4
200-499	10.9%	6
500-999	3.6%	2
1,000+	9.1%	5
Don't know	0.0%	0
Answered question		55
Skipped question		12

Source: Dandenong South NEC Business Intentions Survey

Question 36: How has the number of employees at this site changed in the last 2 years?

Figure B.4: Change in number of employees at the site in the last two years



Source: Dandenong South NEC Business Intentions Survey

Table B.5: Change in number of employees at the site in the last two years

Answer Options	Response Share	Response Count
Increased	44.6%	25
Decreased	32.1%	18
Remained about the same	23.2%	13
Answered question		56
Skipped question		11

Source: Dandenong South NEC Business Intentions Survey

Question 37: Have you received business development information or services from a Victorian Government Business Office over the past 12 months?

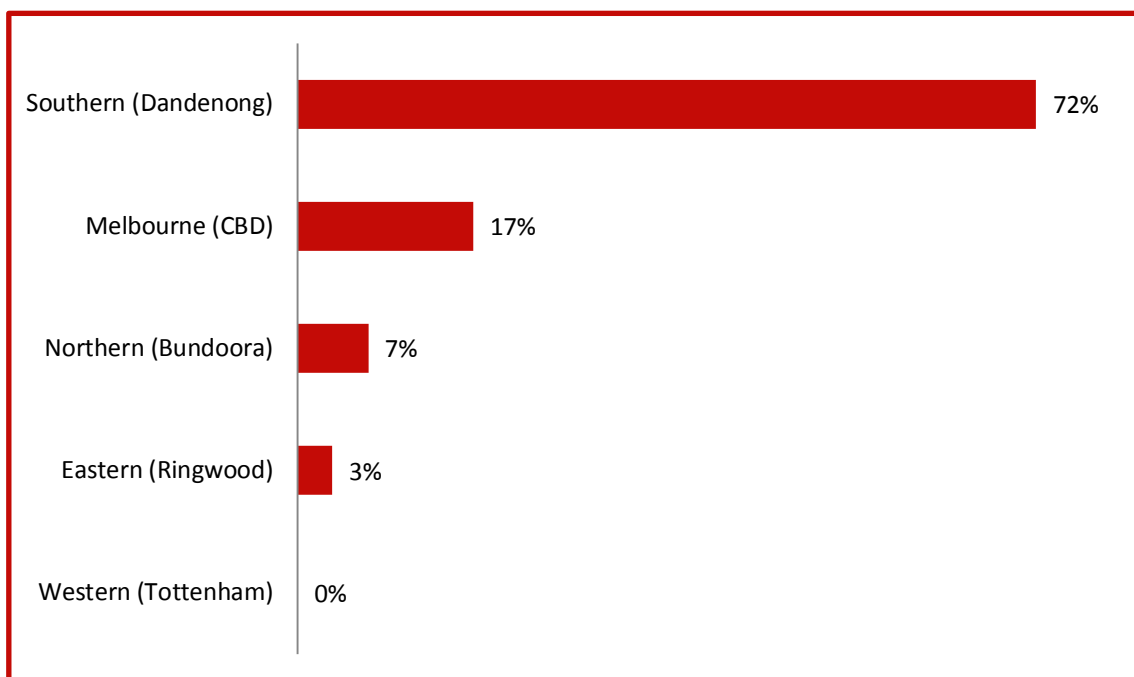
Table B.6: Recipient of business development information or services from a Victorian Government Business Office over the past 12 months

Answer Options	Response Share	Response Count
Yes	45.6%	26
No	33.3%	19
Unsure	21.1%	12
Answered question		57
Skipped question		10

Source: Dandenong South NEC Business Intentions Survey

Question 38: If yes, please nominate which Victorian Government Business Office was your primary source of business development information or services

Figure B.5: Nominated Victorian Government Business Office



Source: Dandenong South NEC Business Intentions Survey

Table B.7: Nominated Victorian Government Business Office

Answer Options	Response Share	Response Count
Southern (Dandenong)	72.4%	21
Eastern (Ringwood)	3.4%	1
Northern (Bundoora)	6.9%	2
Western (Tottenham)	0.0%	0
Melbourne (CBD)	17.2%	5
Answered question		29
Skipped question		38

Source: Dandenong South NEC Business Intentions Survey

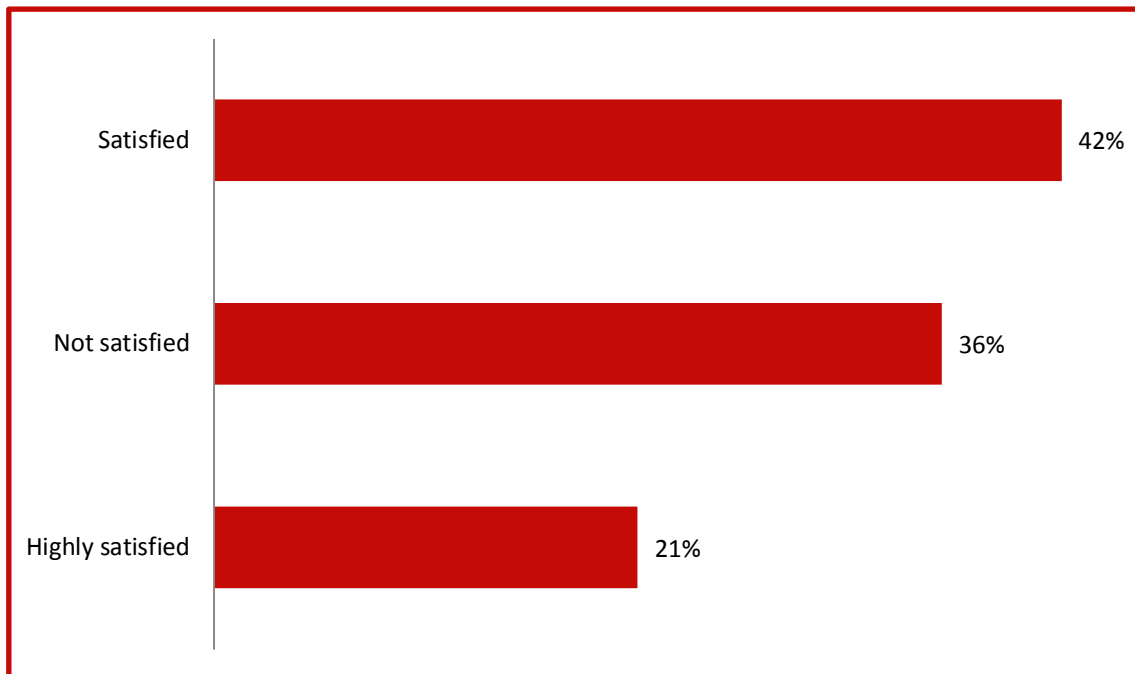
Question 39: Having received business development information or services from a Victorian Government Business Office, were you satisfied?

Table B.8: Satisfaction with business development information or services from a Victorian Government Business Office

Answer Options	Response Share	Response Count
Highly satisfied	21.2%	7
Satisfied	42.4%	14
Not satisfied	36.4%	12
Answered question		33
Skipped question		34

Source: Dandenong South NEC Business Intentions Survey

Figure B.6: Satisfaction with business development information or services from a Victorian Government Business Office



Source: Dandenong South NEC Business Intentions Survey

APPENDIX C: FISHERMANS BEND URA

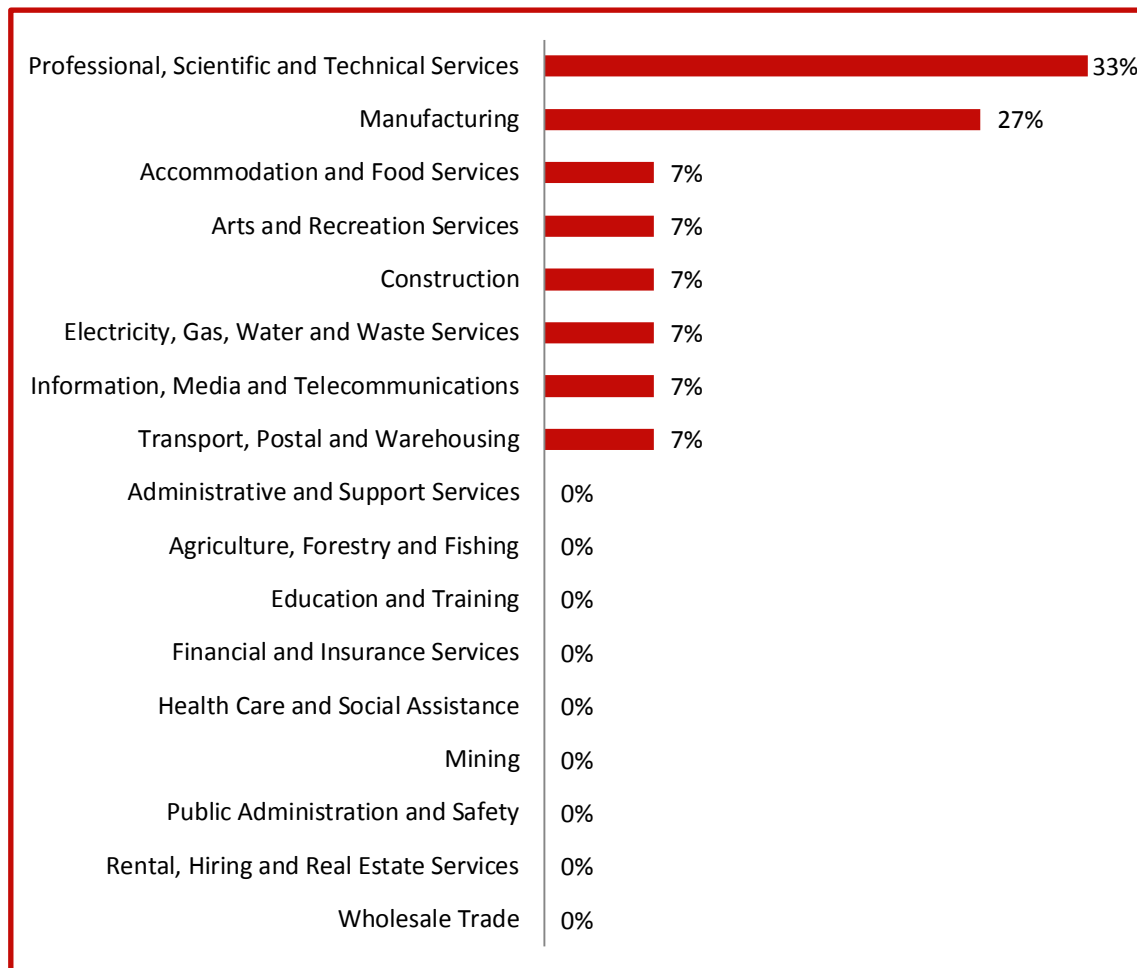
Question 32: Is this site the Head/Principal Office for your business?

Table C.1: Head/Principal office

Is this site the Head/Principal Office for your business?		
Answer Options	Response Share	Response Count
Yes	86.7%	13
No	13.3%	2
Answered question		15
Skipped question		1
Source: Fishermans Bend URA Business Intentions Survey		

Question 33: Please select the core area of business undertaken at this site.

Figure C.1: Core area of business undertaken at the site

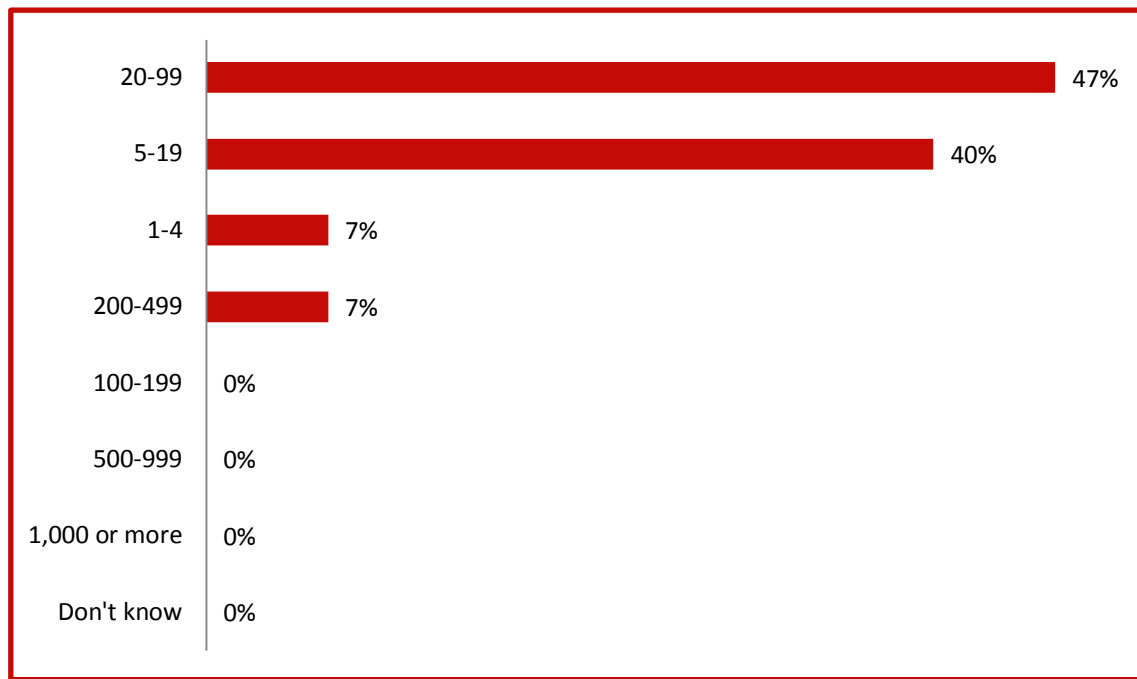


Source: Fishermans Bend URA Business Intentions Survey

Table C.2: Core area of business undertaken at the site

Answer Options	Response Share	Response Count
Accommodation and Food Services	6.7%	1
Administrative and Support Services	0.0%	0
Agriculture, Forestry and Fishing	0.0%	0
Arts and Recreation Services	6.7%	1
Construction	6.7%	1
Education and Training	0.0%	0
Electricity, Gas, Water and Waste Services	6.7%	1
Financial and Insurance Services	0.0%	0
Health Care and Social Assistance	0.0%	0
Information, Media and Telecommunications	6.7%	1
Manufacturing	26.7%	4
Mining	0.0%	0
Professional, Scientific and Technical Services	33.3%	5
Public Administration and Safety	0.0%	0
Rental, Hiring and Real Estate Services	0.0%	0
Transport, Postal and Warehousing	6.7%	1
Wholesale Trade	0.0%	0
Answered question		15
Skipped question		1

Source: Fishermans Bend URA Business Intentions Survey

Question 34: How many employees (full-time, part-time and casual) work from this site?**Figure C.2: Number of employees that work from the site**

Source: Fishermans Bend URA Business Intentions Survey

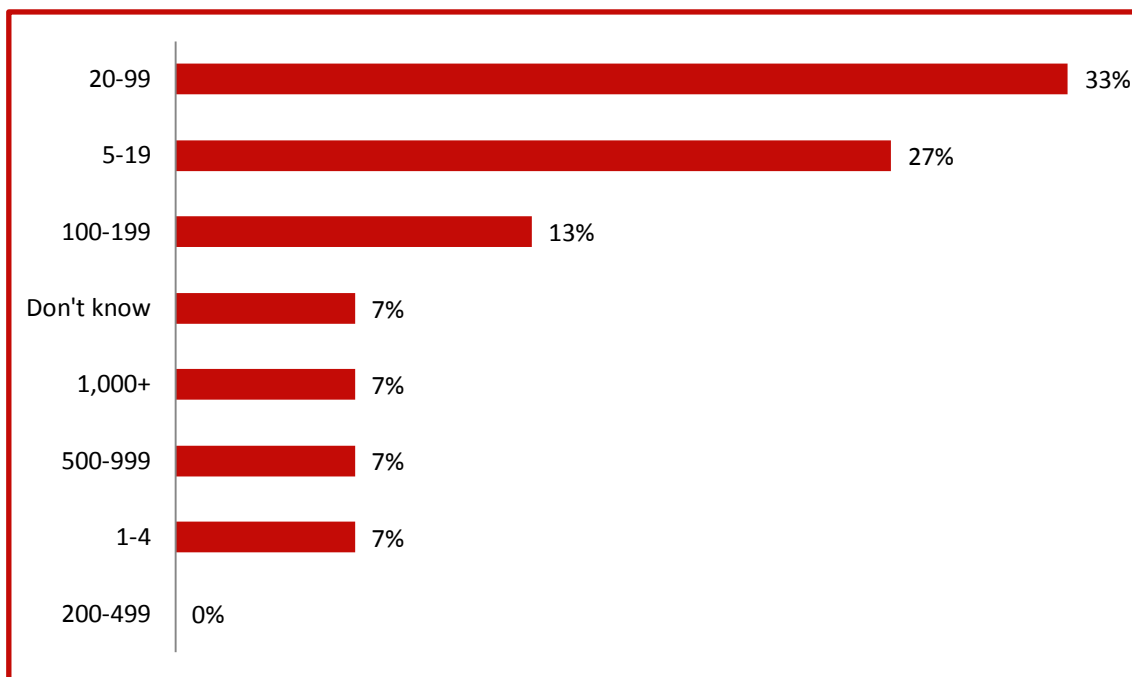
Table C.3: Number of employees that work from the site**How many employees (full-time, part-time and casual) work from this site?**

Answer Options	Response Per cent	Response Count
1-4	6.7%	1
5-19	40.0%	6
20-99	46.7%	7
100-199	0.0%	0
200-499	6.7%	1
500-999	0.0%	0
1,000 or more	0.0%	0
Don't know	0.0%	0
Answered question		15
Skipped question		1

Source: Fishermans Bend URA Business Intentions Survey

Question 35: How many employees (full-time, part-time and casual) work for this business in total (including other locations)?

Figure C.3: Number of employees that work for this business in total



Source: Fishermans Bend URA Business Intentions Survey

Table C.4: Number of employees that work for this business in total

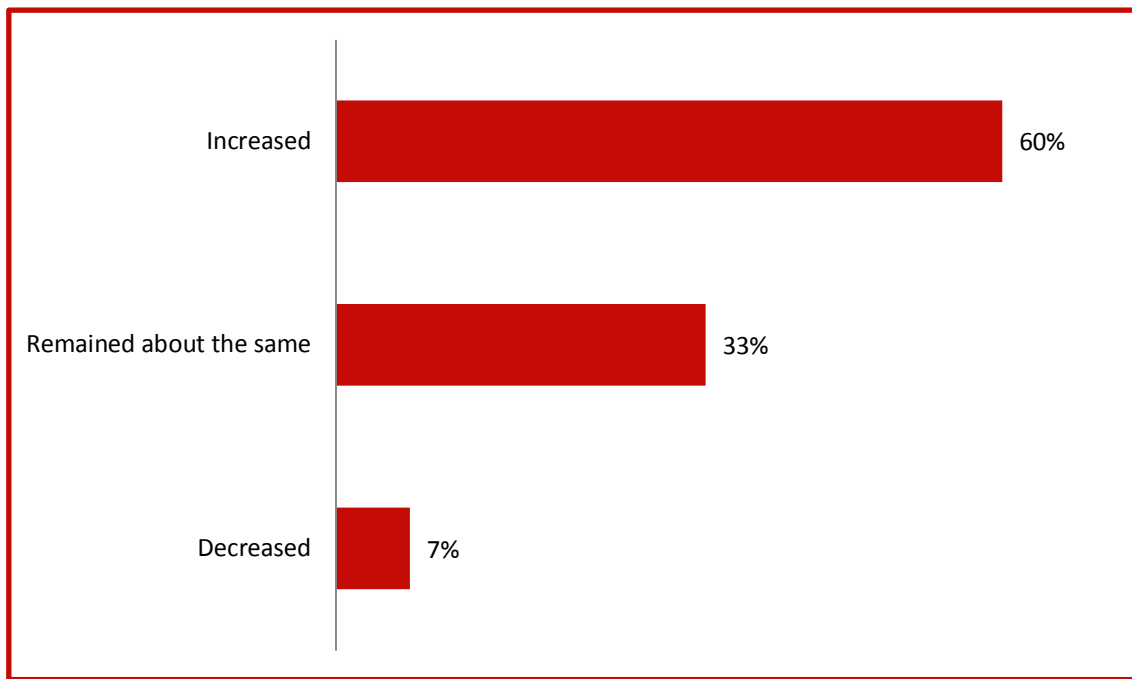
How many employees (full-time, part-time and casual) work for this business in total (including other locations)?

Answer Options	Response Share	Response Count
1-4	6.7%	1
5-19	26.7%	4
20-99	33.3%	5
100-199	13.3%	2
200-499	0.0%	0
500-999	6.7%	1
1,000+	6.7%	1
Don't know	6.7%	1
Answered question		15
Skipped question		1

Source: Fishermans Bend URA Business Intentions Survey

Question 36: How has the number of employees at this site changed in the last 2 years?

Figure C.4: Change in number of employees at the site in the last two years



Source: Fishermans Bend URA Business Intentions Survey

Table C.5: Change in number of employees at the site in the last two years

How has the number of employees at this site changed in the last 2 years?

Answer Options	Response Share	Response Count
Increased	60.0%	9
Decreased	6.7%	1
Remained about the same	33.3%	5
Answered question		15
Skipped question		1

Source: Fishermans Bend URA Business Intentions Survey

Question 37: Have you received business development information or services from a Victorian Government Business Office over the past 12 months?

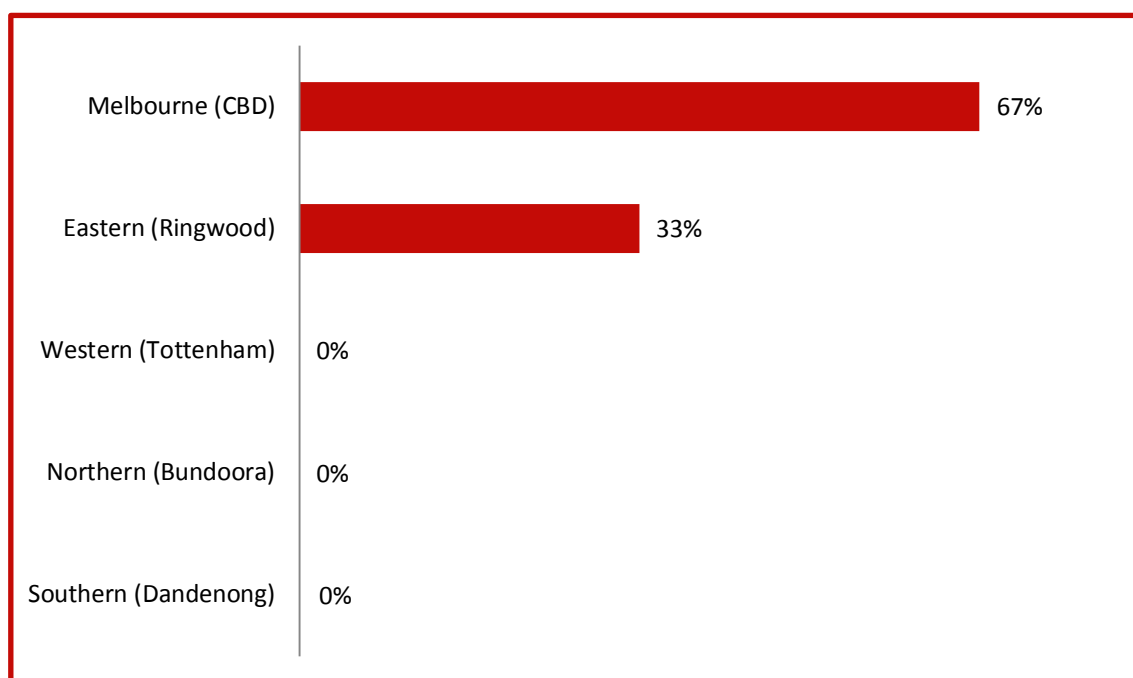
Table C.6: Recipient of business development information or services from a Victorian Government Business Office over the past 12 months.

Answer Options	Response Share	Response Count
Yes	26.7%	4
No	53.3%	8
Unsure	20.0%	3
Answered question		15
Skipped question		1

Source: Fishermans Bend URA Business Intentions Survey

Question 38: If yes, please nominate which Victorian Government Business Office was your primary source of business development information or services

Figure C.5: Nominated Victorian Government Business Office



Source: Fishermans Bend URA Business Intentions Survey

Table C.7: Nominated Victorian Government Business Office

Answer Options	Response Share	Response Count
Southern (Dandenong)	0.0%	0
Eastern (Ringwood)	33.3%	1
Northern (Bundoora)	0.0%	0
Western (Tottenham)	0.0%	0
Melbourne (CBD)	66.7%	2
Answered question		3
Skipped question		13

Source: Fishermans Bend URA Business Intentions Survey

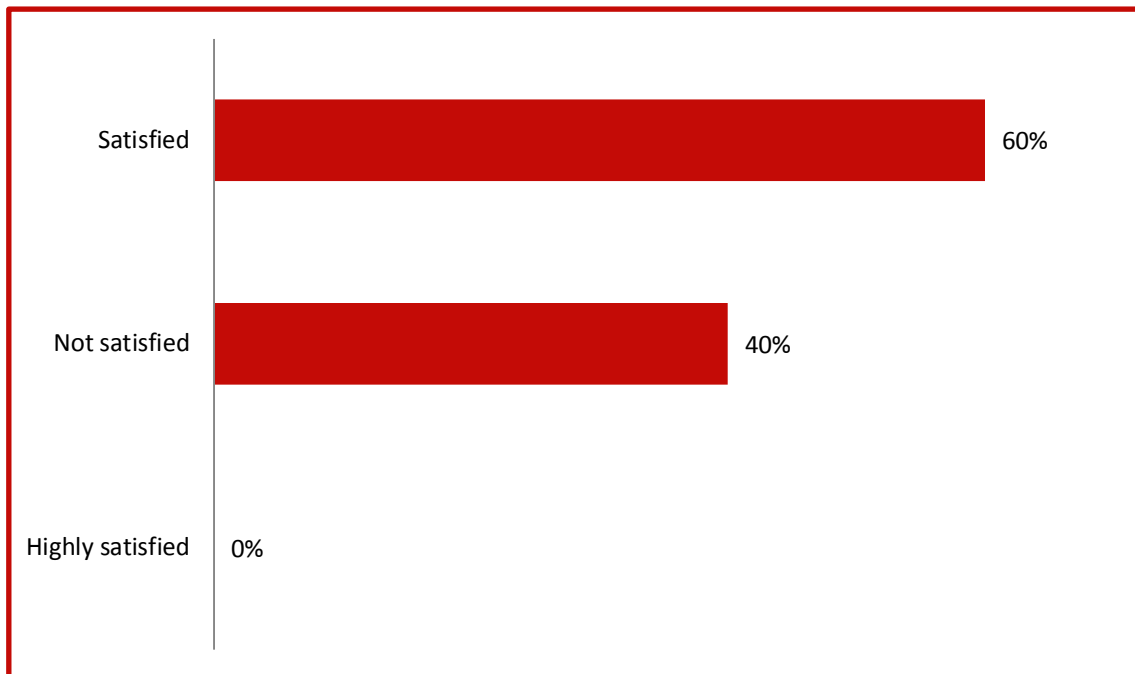
Question 39: Having received business development information or services from a Victorian Government Business Office, were you satisfied?

Table C.8: Satisfaction with business development information or services from a Victorian Government Business Office

Answer Options	Response Per cent	Response Count
Highly satisfied	0.0%	0
Satisfied	60.0%	3
Not satisfied	40.0%	2
Answered question		5
Skipped question		11

Source: Fishermans Bend URA Business Intentions Survey

Figure C.6: Satisfaction with business development information or services from a Victorian Government Business Office



Source: Fishermans Bend URA Business Intentions Survey

APPENDIX D: LA TROBE NEC

Question 32: Is this site the Head/Principal Office for your business?

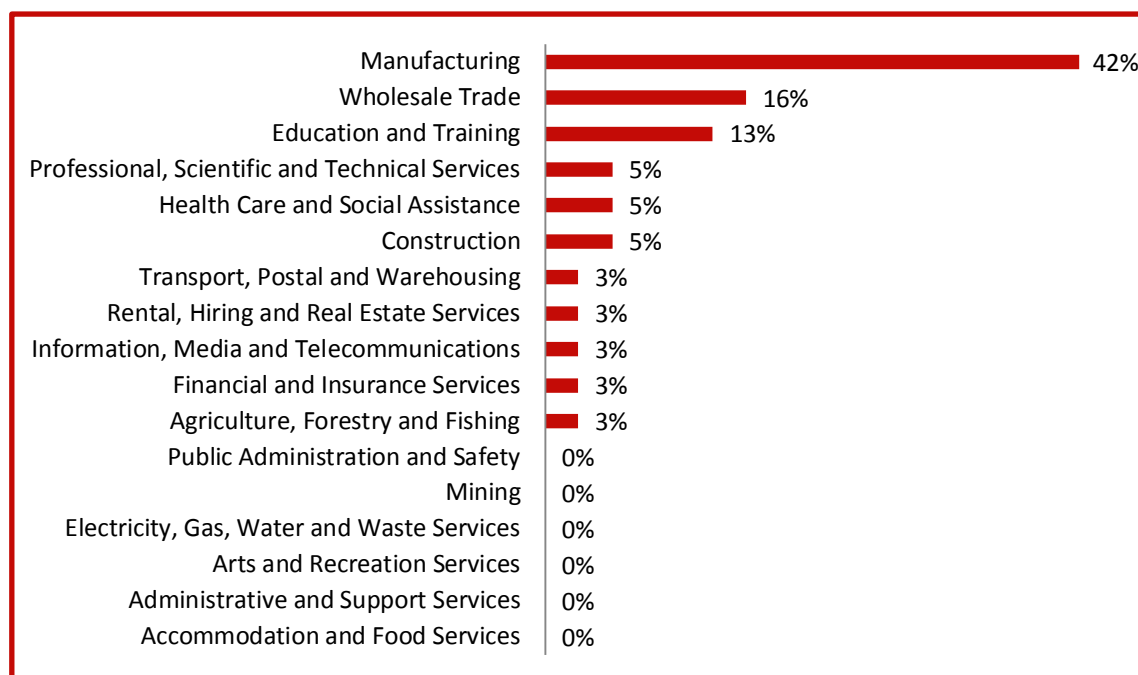
Table D.1: Head/Principal office

Answer Options	Response Share	Response Count
Yes	91.7%	33
No	8.3%	3
Answered question		36
Skipped question		9

Source: La Trobe NEC Business Intentions Survey

Question 33: Please select the core area of business undertaken at this site.

Figure D.1: Core area of business undertaken at the site



Source: La Trobe NEC Business Intentions Survey

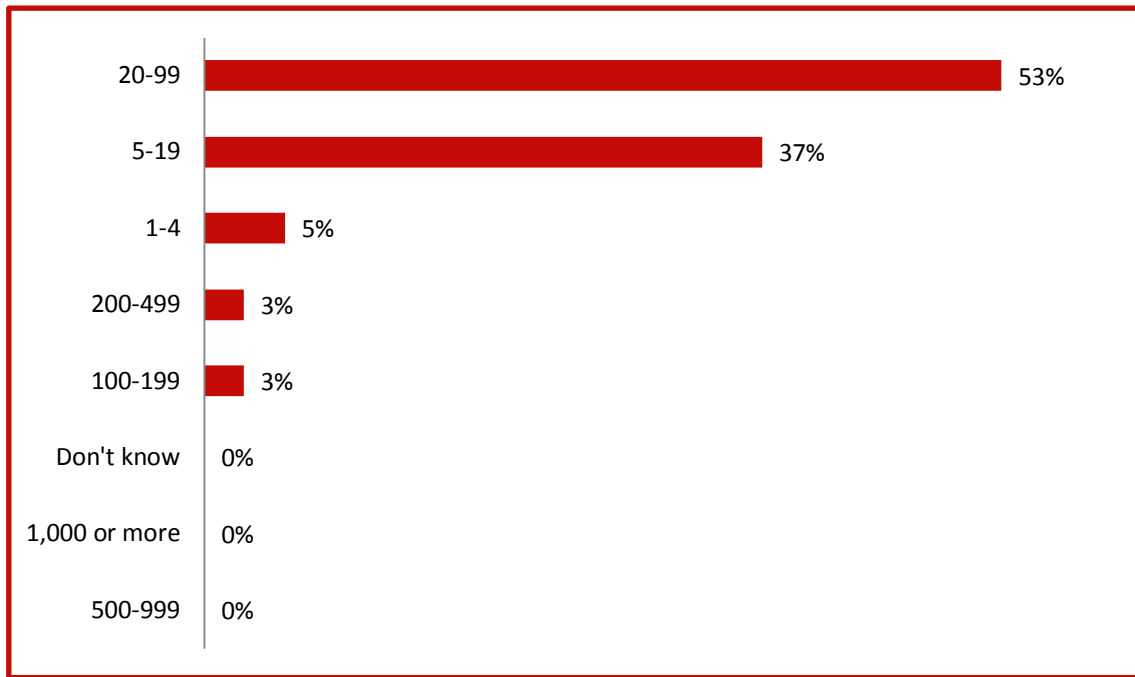
Table D.2: Core area of business undertaken at the site

Answer Options	Response Share	Response Count
Accommodation and Food Services	0.0%	0
Administrative and Support Services	0.0%	0
Agriculture, Forestry and Fishing	2.6%	1
Arts and Recreation Services	0.0%	0
Construction	5.3%	2
Education and Training	13.2%	5
Electricity, Gas, Water and Waste Services	0.0%	0
Financial and Insurance Services	2.6%	1
Health Care and Social Assistance	5.3%	2
Information, Media and Telecommunications	2.6%	1
Manufacturing	42.1%	16
Mining	0.0%	0
Professional, Scientific and Technical Services	5.3%	2
Public Administration and Safety	0.0%	0
Rental, Hiring and Real Estate Services	2.6%	1
Transport, Postal and Warehousing	2.6%	1
Wholesale Trade	15.8%	6
Answered question		38
Skipped question		7

Source: La Trobe NEC Business Intentions Survey

Question 34: How many employees (full-time, part-time and casual) work from this site?

Figure D.2: Number of employees that work from the site



Source: La Trobe NEC Business Intentions Survey

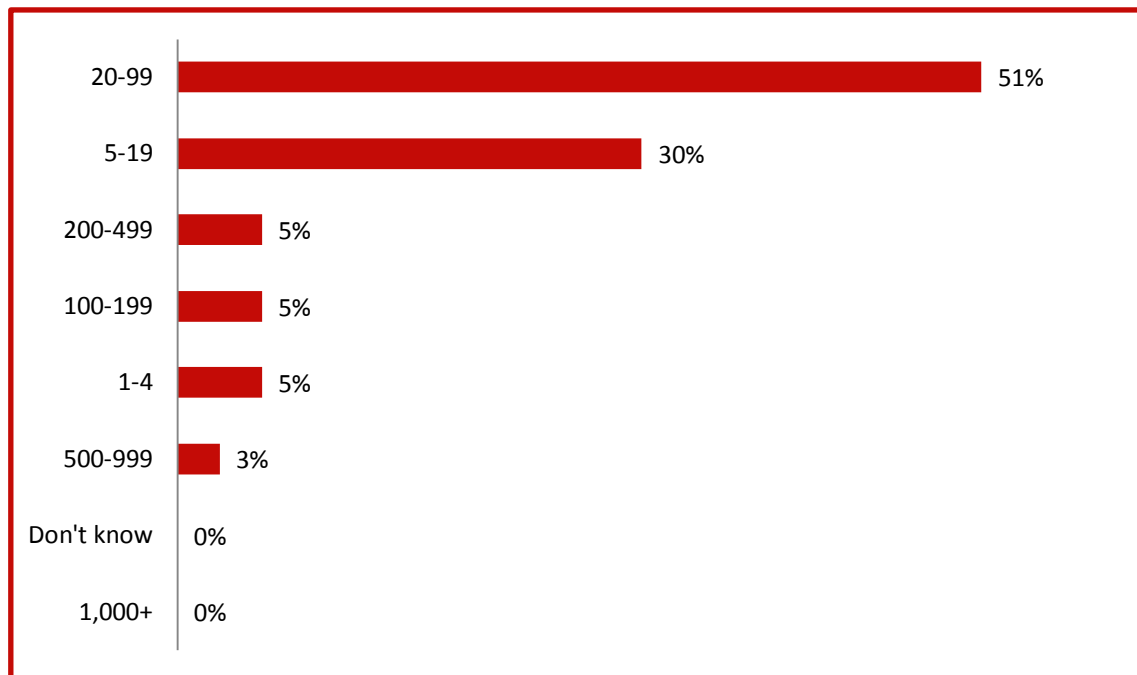
Table D.3: Number of employees that work from the site

Answer Options	Response Share	Response Count
1-4	5.3%	2
5-19	36.8%	14
20-99	52.6%	20
100-199	2.6%	1
200-499	2.6%	1
500-999	0.0%	0
1,000 or more	0.0%	0
Don't know	0.0%	0
Answered question		38
Skipped question		7

Source: La Trobe NEC Business Intentions Survey

Question 35: How many employees (full-time, part-time and casual) work for this business in total (including other locations)?

Figure D.3: Number of employees that work for this business in total



Source: La Trobe NEC Business Intentions Survey

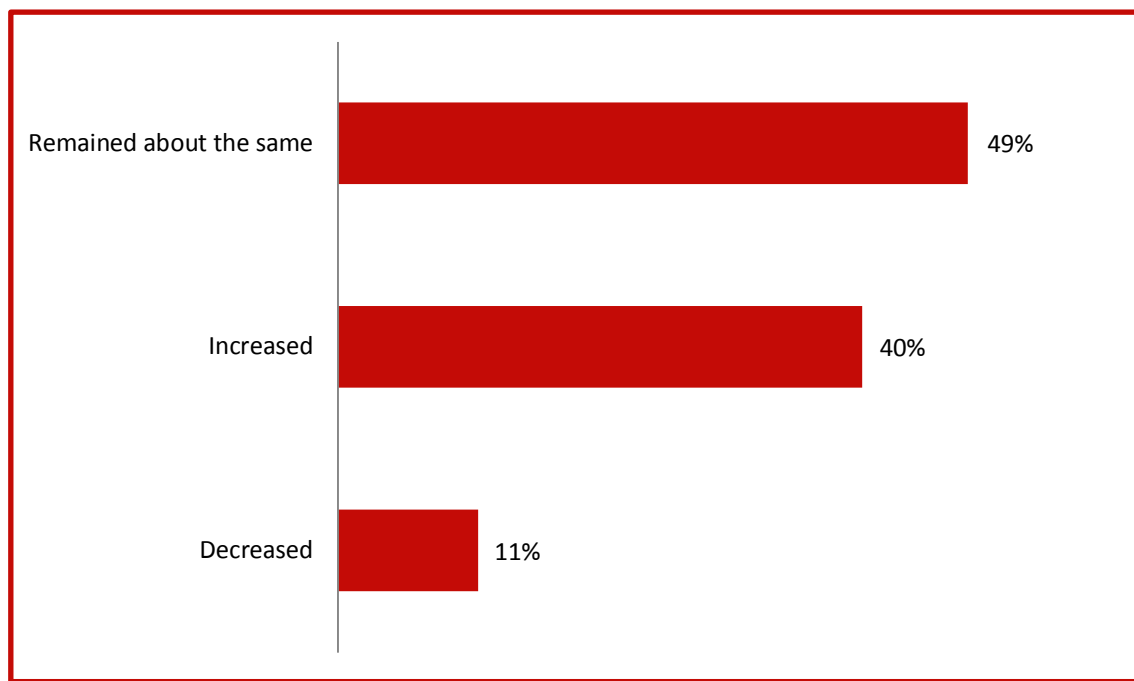
Table D.4: Number of employees that work for this business in total

Answer Options	Response Share	Response Count
1-4	5.4%	2
5-19	29.7%	11
20-99	51.4%	19
100-199	5.4%	2
200-499	5.4%	2
500-999	2.7%	1
1,000+	0.0%	0
Don't know	0.0%	0
Answered question		37
Skipped question		8

Source: La Trobe NEC Business Intentions Survey

Question 36: How has the number of employees at this site changed in the last 2 years?

Figure D.4: Change in number of employees at the site in the last two years



Source: La Trobe NEC Business Intentions Survey

Table D.5: Change in number of employees at the site in the last two years

Answer Options	Response Share	Response Count
Increased	40.5%	15
Decreased	10.8%	4
Remained about the same	48.6%	18
Answered question		37
Skipped question		8

Source: La Trobe NEC Business Intentions Survey

Question 37: Have you received business development information or services from a Victorian Government Business Office over the past 12 months?

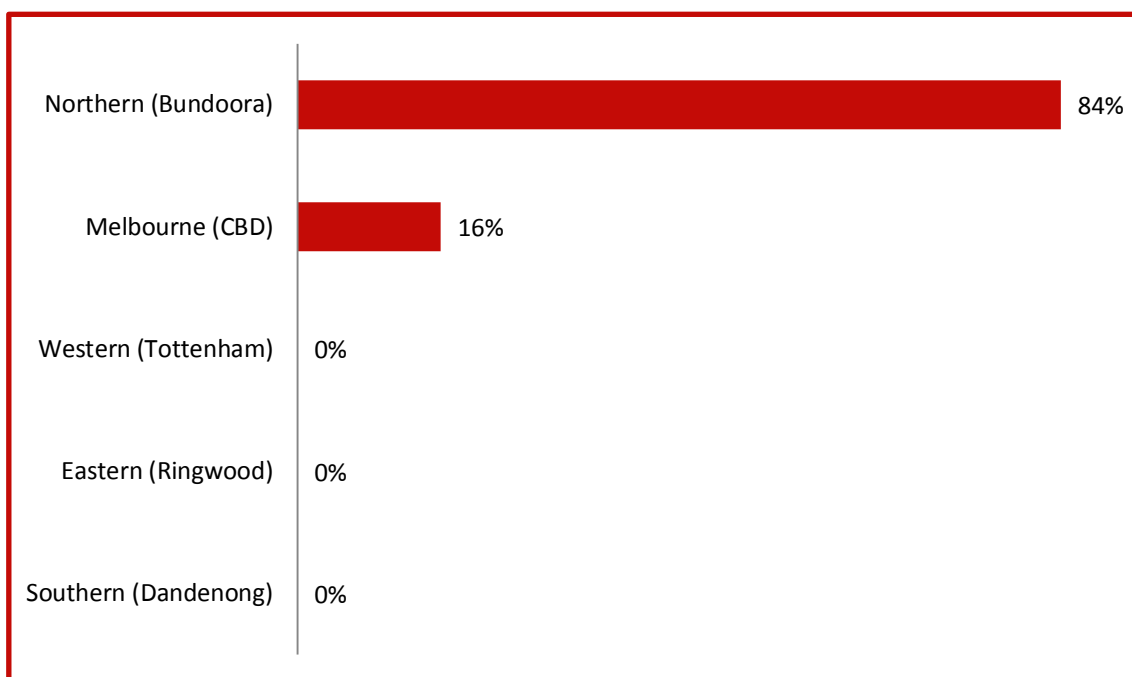
Table D.6: Recipient of business development information or services from a Victorian Government Business Office over the past 12 months

Answer Options	Response Share	Response Count
Yes	44.4%	16
No	36.1%	13
Unsure	19.4%	7
Answered question		36
Skipped question		9

Source: La Trobe NEC Business Intentions Survey

Question 38: If yes, please nominate which Victorian Government Business Office was your primary source of business development information or services

Figure D.5: Which Victorian Government Business Office was your primary source of information.



Source: La Trobe NEC Business Intentions Survey

Table D.7: Which Victorian Government Business Office was your primary source of information?

If yes, please nominate which Victorian Government Business Office was your primary source of business development information or services:

Answer Options	Response Share	Response Count
Southern (Dandenong)	0.0%	0
Eastern (Ringwood)	0.0%	0
Northern (Bundoora)	84.2%	16
Western (Tottenham)	0.0%	0
Melbourne (CBD)	15.8%	3
Answered question		19
Skipped question		26

Source: La Trobe NEC Business Intentions Survey

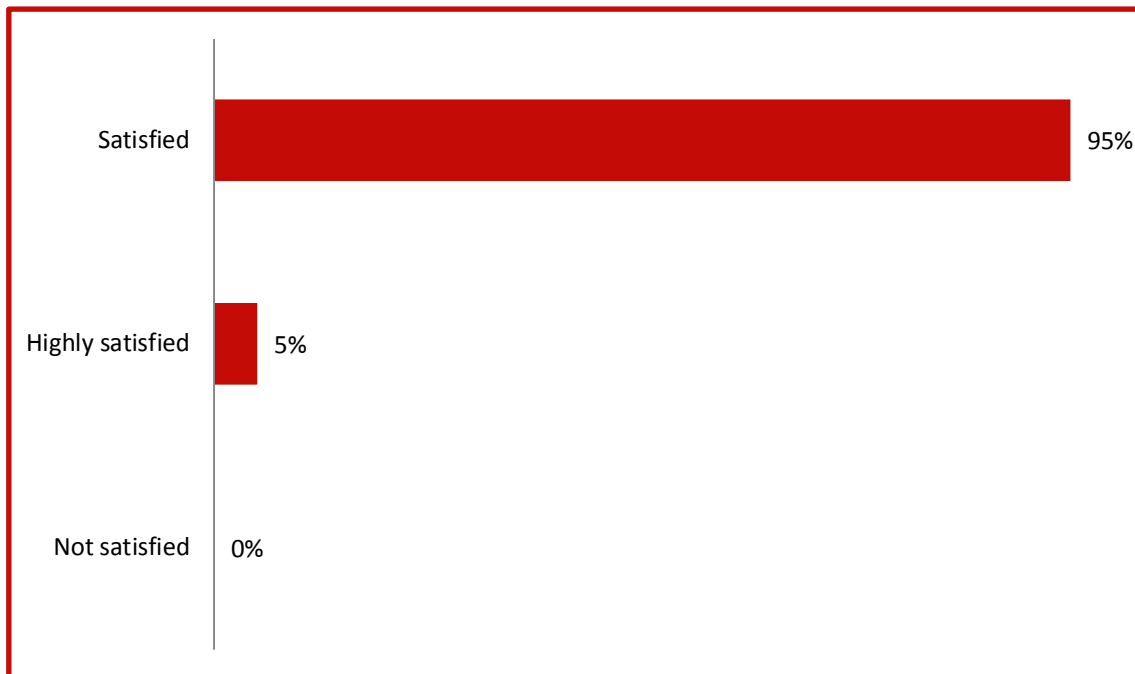
Question 39: Having received business development information or services from a Victorian Government Business Office, were you satisfied?

Table: D.8: Satisfaction with business development information or services from a Victorian Government Business Office

Answer Options	Response Share	Response Count
Highly satisfied	4.8%	1
Satisfied	95.2%	20
Not satisfied	0.0%	0
Answered question		21
Skipped question		24

Source: La Trobe NEC Business Intentions Survey

Figure D.6: Satisfaction with business development information or services from a Victorian Government Business Office



Source: La Trobe NEC Business Intentions Survey

APPENDIX E: SUNSHINE NEC

Question 32: Is this site the Head/Principal Office for your business?

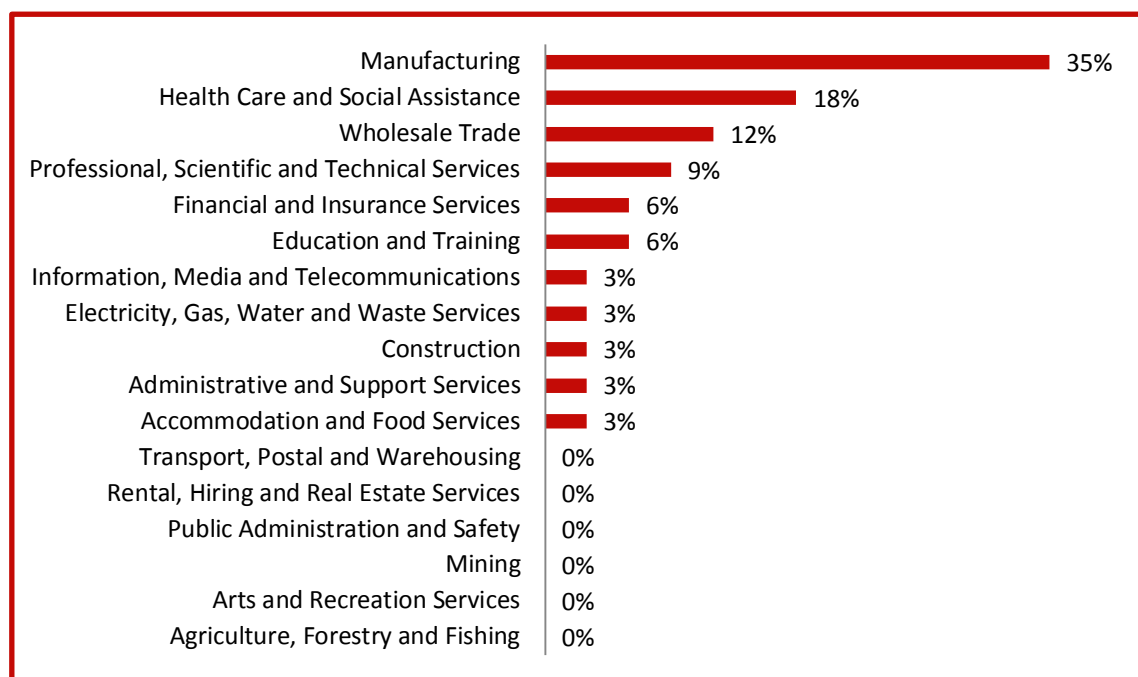
Table E.1: Head/Principal office

Answer Options	Response Share	Response Count
Yes	73.5%	25
No	26.5%	9
Answered question		34
Skipped question		2

Source: Sunshine NEC Business Intentions Survey

Question 33: Please select the core area of business undertaken at this site.

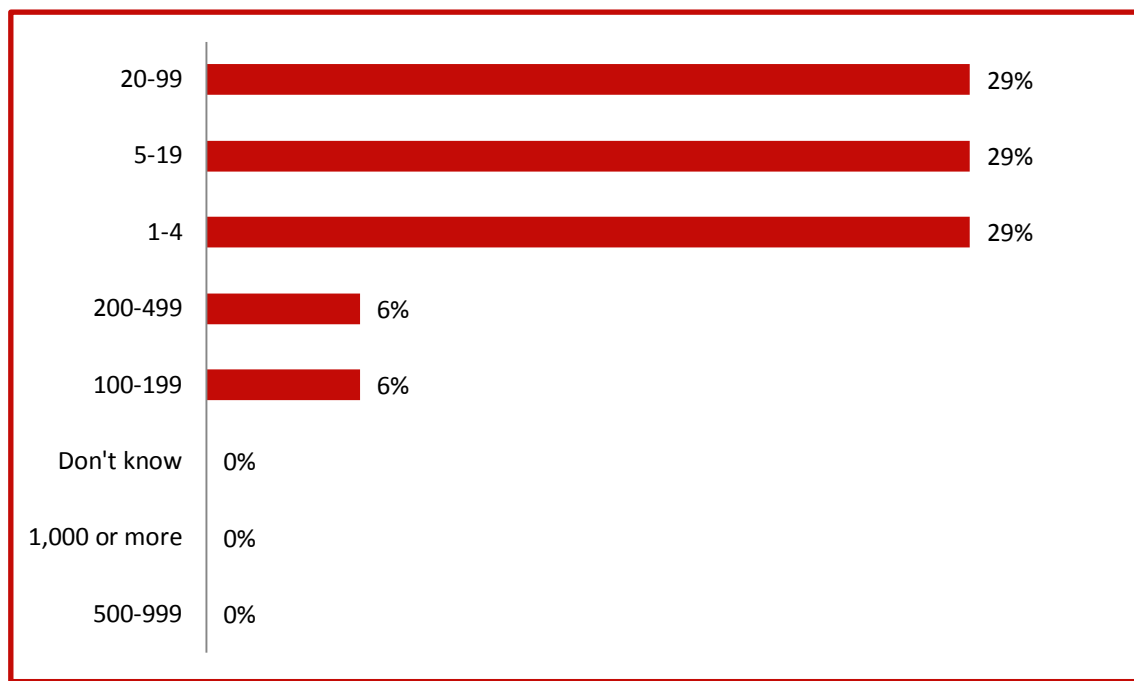
Figure E.1: Core area of business undertaken at the site



Source: Sunshine NEC Business Intentions Survey

Table E.2: Core area of business undertaken at the site

Answer Options	Response Share	Response Count
Accommodation and Food Services	2.9%	1
Administrative and Support Services	2.9%	1
Agriculture, Forestry and Fishing	0.0%	0
Arts and Recreation Services	0.0%	0
Construction	2.9%	1
Education and Training	5.9%	2
Electricity, Gas, Water and Waste Services	2.9%	1
Financial and Insurance Services	5.9%	2
Health Care and Social Assistance	17.6%	6
Information, Media and Telecommunications	2.9%	1
Manufacturing	35.3%	12
Mining	0.0%	0
Professional, Scientific and Technical Services	8.8%	3
Public Administration and Safety	0.0%	0
Rental, Hiring and Real Estate Services	0.0%	0
Transport, Postal and Warehousing	0.0%	0
Wholesale Trade	11.8%	4
Answered question		34
Skipped question		2
Source: Sunshine NEC Business Intentions Survey		

Question 34: How many employees (full-time, part-time and casual) work from this site?**Figure E.2: Number of employees that work from the site**

Source: Sunshine NEC Business Intentions Survey

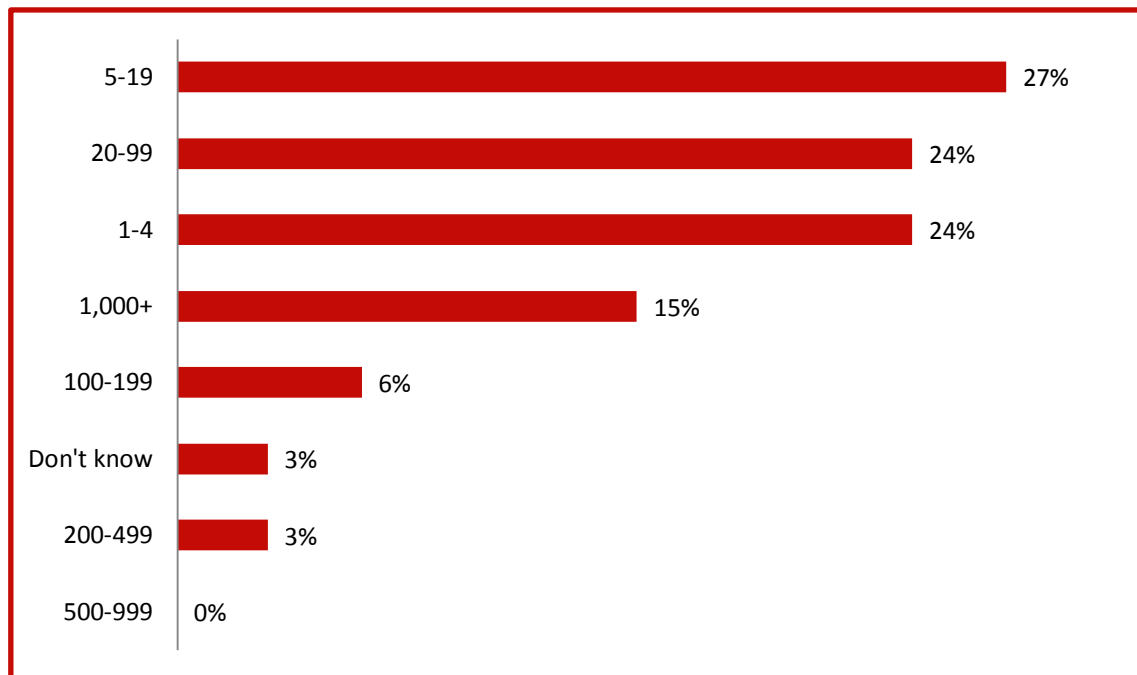
Table E.3: Number of employees that work from the site

Answer Options	Response Share	Response Count
1-4	29.4%	10
5-19	29.4%	10
20-99	29.4%	10
100-199	5.9%	2
200-499	5.9%	2
500-999	0.0%	0
1,000 or more	0.0%	0
Don't know	0.0%	0
Answered question		34
Skipped question		2

Source: Sunshine NEC Business Intentions Survey

Question 35: How many employees (full-time, part-time and casual) work for this business in total (including other locations)?

Figure E.3: Number of employees that work for this business in total



Source: Sunshine NEC Business Intentions Survey

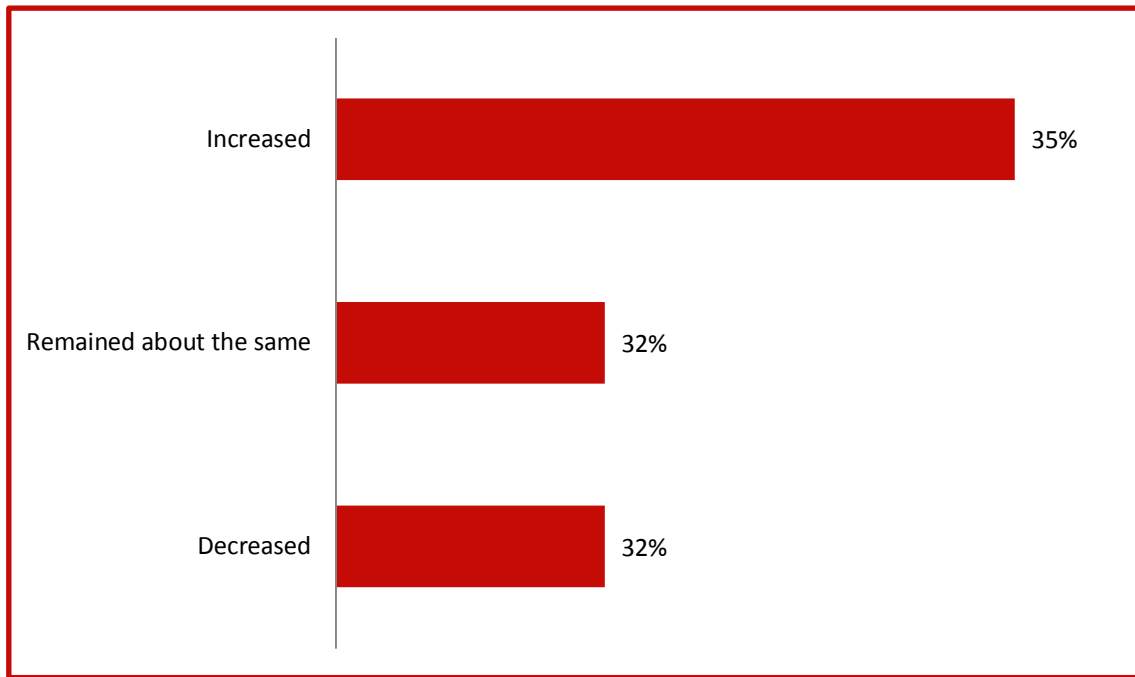
Table E.4: Number of employees that work for this business in total

Answer Options	Response Share	Response Count
1-4	23.5%	8
5-19	26.5%	9
20-99	23.5%	8
100-199	5.9%	2
200-499	2.9%	1
500-999	0.0%	0
1,000+	14.7%	5
Don't know	2.9%	1
Answered question		34
Skipped question		2

Source: Sunshine NEC Business Intentions Survey

Question 36: How has the number of employees at this site changed in the last 2 years?

Figure E.4: Change in number of employees at the site in the last two years



Source: Sunshine NEC Business Intentions Survey

Table E.5: Change in number of employees at the site in the last two years

Answer Options	Response Share	Response Count
Increased	35.3%	12
Decreased	32.4%	11
Remained about the same	32.4%	11
Answered question		34
Skipped question		2

Source: Sunshine NEC Business Intentions Survey

Question 37: Have you received business development information or services from a Victorian Government Business Office over the past 12 months?

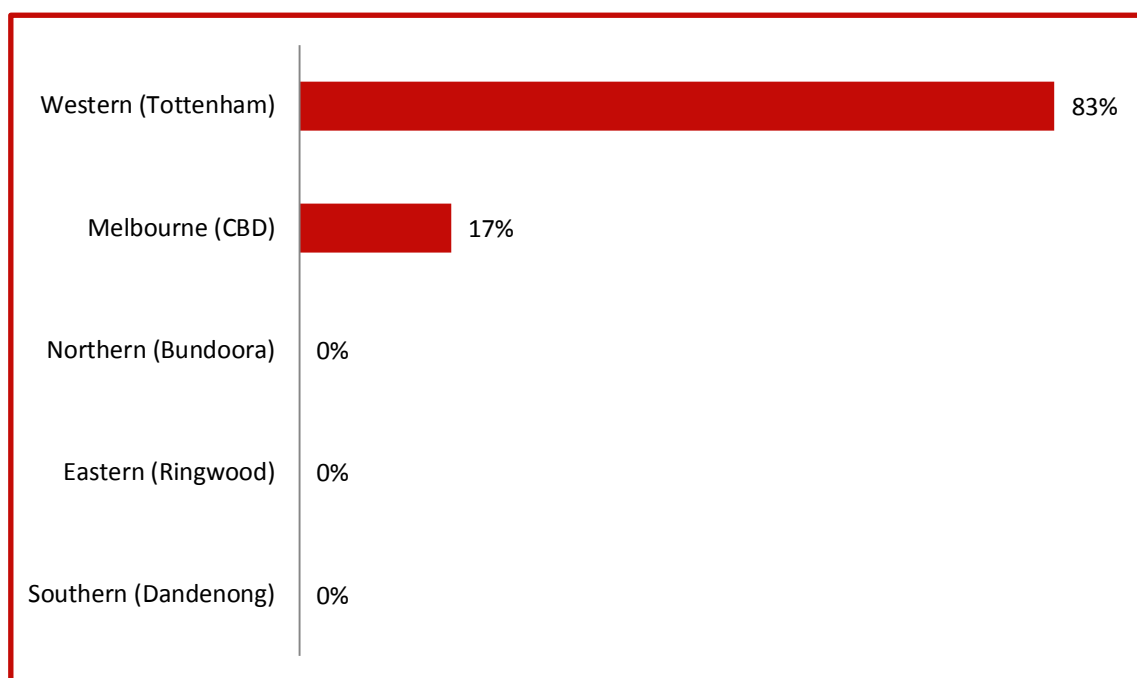
Table E.6: Recipient of business development information or services from a Victorian Government Business Office over the past 12 months.

Answer Options	Response Share	Response Count
Yes	29.4%	10
No	50.0%	17
Unsure	20.6%	7
Answered question		34
Skipped question		2

Source: Sunshine NEC Business Intentions Survey

Question 38: If yes, please nominate which Victorian Government Business Office was your primary source of business development information or services

Figure E.5: Nominated Victorian Government Business Office



Source: Sunshine NEC Business Intentions Survey

Table E.7: Nominated Victorian Government Business Office

Answer Options	Response Share	Response Count
Southern (Dandenong)	0.0%	0
Eastern (Ringwood)	0.0%	0
Northern (Bundoora)	0.0%	0
Western (Tottenham)	83.3%	10
Melbourne (CBD)	16.7%	2
Answered question		12
Skipped question		24

Source: Sunshine NEC Business Intentions Survey

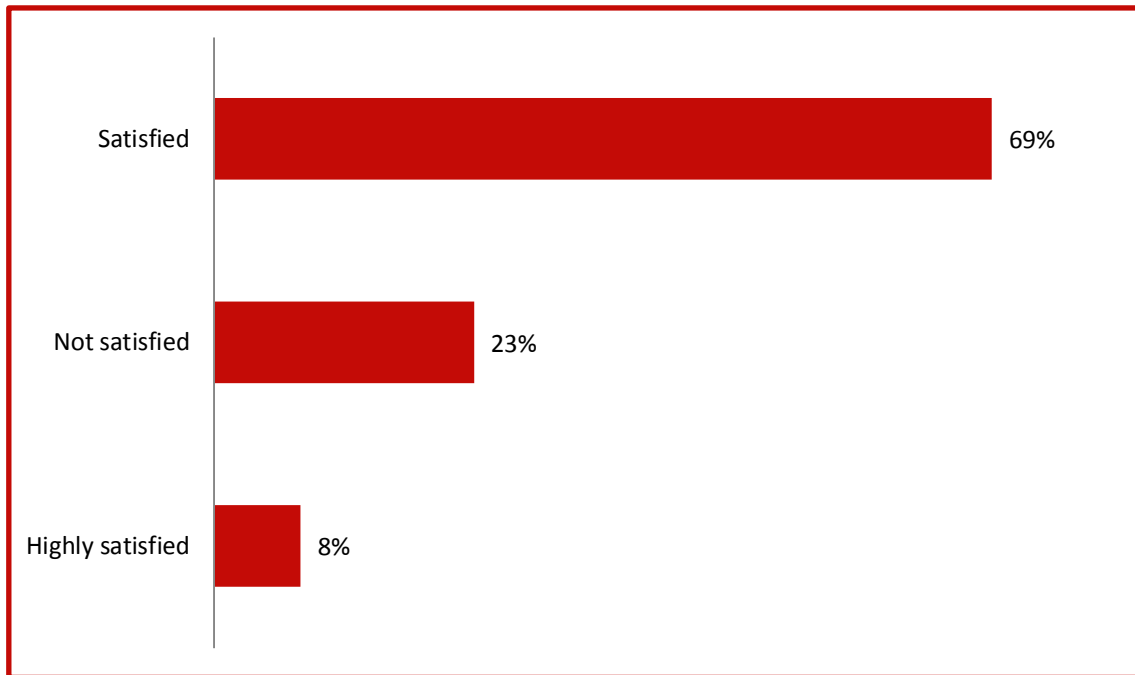
Question 39: Having received business development information or services from a Victorian Government Business Office, were you satisfied?

Table E.8: Satisfaction with business development information or services from a Victorian Government Business Office

Answer Options	Response Share	Response Count
Highly satisfied	7.7%	1
Satisfied	69.2%	9
Not satisfied	23.1%	3
Answered question		13
Skipped question		23

Source: Sunshine NEC Business Intentions Survey

Figure E.6: Satisfaction with business development information or services from a Victorian Government Business Office



Source: Sunshine NEC Business Intentions Survey