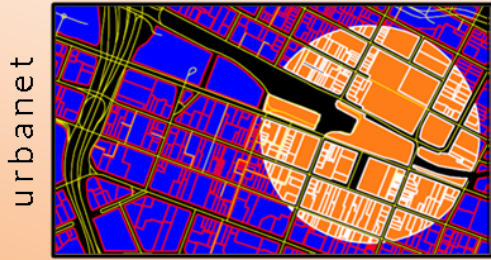


CURTIN UNIVERSITY OF TECHNOLOGY



STATION PRECINCTS AND ECONOMIC ACTIVITY: WAVE 1 2006

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**IMPACTS OF TRANSIT LED DEVELOPMENT
IN A NEW RAIL CORRIDOR**

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1. Introduction

The Australian Research Council – Transit Orientated Design research program provides an opportunity to study the effects of the new railway on business activities in the South-West corridor of the Perth to Mandurah region. The research is specifically looking at the implementation of TODs' in various guises along the rail line.

The working paper deals with impacts on economic activities and opportunities by looking at commercial land use change as well as attitudes over the period of the study. It focuses on three strategic precincts; Bullcreek, Cockburn Central and Wellard. It reports on Wave 1 (2006) Business surveys, completed July 2006.

Working paper 1 - Station Precinct Selection outlines the process and rationale for the development of the three precincts.

2. Research Approach

2.1 Literature Review

The primary objective of the literature review was to inform the development of a survey instrument that was applicable to the Perth business environment, reflecting the range of issues that would be factored into the decision to locate in a specific location over another. The database search was undertaken focussing on SME's relating to;

- Location
- Decision making
- Land use pattern
- Location decisions
- Location pattern
- Location selection
- Location theory
- Site selection
- Small business location
- Revealed preferences
- Service businesses

2.2 Interviews

In addition to the literature review, face to face and telephone interviews were conducted with several local institutions and agencies in an effort to capture the most relevant local factors in business location decisions. It was evident that what research had been undertaken in the field of Business Location Factors was inaccessible due to privacy issues (Beeck 2006). The following institutions and agencies were contacted.

- Cockburn Council
- Melville Council
- Kwinana Council
- Fremantle Council
- Small Business Development Corporation
- West Australian Small Business Enterprise
- Western Australian Chamber of Commerce
- Curtin University Business School
- Entrepreneurial Business Unit (Curtin University of Technology)
- WA Business News
- Market Equity
- The Marketing Centre
- The Property Council
- Real Estate Institute of Western Australia (REIWA)
- Small and Medium Enterprise Research Centre, Edith Cowan University
- Mbombela (Greater Nelspruit) local municipality, South Africa

3 Business and location decision

Article	Type of study	Scale	Focus	Findings
(McQuaid et al. 2004).	Empirical	Macro	Implications of transport in decisions United Kingdom	Transport, whilst not a dominant factor in location decisions, can through perceived or actual accessibility issues play a critical role in decision making.
(Gambale et al. 2003)	Empirical Factor analysis	Macro	6 core factors United States	Labour; Transportation/Telecommunications; finance; other factors and QOL
(Karakaya and Canel 1998)	Empirical & simulation	Macro	6 core factors United States	Cost; QOL; Location; Resources; Business Environment; Existing Building
(Wendt 1972)	Conceptual	Macro	Models of location decisions – traditional cost, demand intangible United States	Despite formulations to measure what variables make up the location decision, for SME's, owner intuitive and preferences are implicit in the decision.
(Love and Crompton 1999)	Empirical Factor analysis	Macro	Role of QOL United States	QOL important in companies location and relocation. Five main areas – QOL; Labour & Costs; Gvt involvement and taxes; daily living concerns; proximity to relevant groups

3.1 Overview of literature

Location decision literature sets out to distinguish what locational attributes business professionals use when choosing to locate their business operations. (Karakaya and Canel 1998) states that the location decision “*should be consistent with the long term strategic direction of the firm*”. More importantly, these decisions should place the business in a location that gives it competitive advantage (Karakaya and Canel 1998). Karakaya and Canel surveyed 84 of the fastest growing businesses in New England and New York using 27 variables that are thought to influence business location decision (Karakaya and Canel 1998). It is recognised that the 27 variables used are industry specific. The survey highlighted that there are six core factors in business location decisions. These include;

Core factor	Attributes
Cost –	<ul style="list-style-type: none"> ○ Start up cost ○ Cost of running a business
Quality of life or standard of living	<ul style="list-style-type: none"> ○ The availability of education facilities ○ Education of residents ○ Recreational facilities ○ Cost of housing ○ Availability of industrial zoned land

<i>Location</i>	<ul style="list-style-type: none"> ○ <i>Proximity to airports, highways, seaports, and local airports</i> ○ <i>Access to skilled labour</i> ○ <i>Availability of medical services</i>
<i>Resources</i>	<ul style="list-style-type: none"> ○ <i>Unskilled labour / low labour costs</i> ○ <i>Freshwater</i> ○ <i>Industrial park</i> ○ <i>Local investment incentives</i> ○ <i>State regulatory environment</i>
<i>Business environment</i>	<ul style="list-style-type: none"> ○ <i>Availability of suppliers</i> ○ <i>Competing businesses</i> ○ <i>Distributors</i> ○ <i>Capital financing</i> ○ <i>Transportation facilities</i>
<i>Existing Buildings</i>	<ul style="list-style-type: none"> ○ <i>Availability of existing buildings</i>

(Karakaya and Canel 1998)

Karakaya and Canel conclude that the most important location decision factor is *cost* followed by *accessibility*. However, Karakaya and Canel note that when *local investment* and *state regulatory environment* are removed from the analysis, *accessibility* emerges as the most important feature in business location decisions (Karakaya and Canel 1998).

Whilst Karakaya deals specifically with fast growing and large businesses, (Wendt 1972), in relation to small businesses, notes that lifestyle and personal factors influence the location decision process. Recreational facilities, preferred residential areas, areas with quality schools, and suburbs away from larger cities and crime are examples of business owner / operators preferences influencing the location decision (Wendt 1972). Love and Crompton (1999) concur with Wendt when they studied 691 high technology company executives. The executives placed more importance on quality of life factors in location decisions than traditional business location elements (Love and Crompton 1999). The shift in paradigm is reflective of a greater understanding of “*people intensive*” businesses (Festervand, et al 1988) cited by (Love and Crompton 1999). A corporate survey completed in 2003 by (Gambale et al. 2003) assessed location decisions in five categories. These include:

Core factor	Attributes
Labour	<ul style="list-style-type: none"> ○ Availability of skilled labour ○ Availability of unskilled labour ○ Training programs ○ Labour costs ○ Low union profile ○ Right to work state
Transportation / Telecommunications	<ul style="list-style-type: none"> ○ Highway accessibility ○ Railroad service ○ Accessibility to major airport ○ Waterway or Oceanport accessibility ○ Availability of telecommunications services

	<ul style="list-style-type: none"> ○ Availability of broadband telecom services
Finance	<ul style="list-style-type: none"> ○ Availability of long term financing ○ Corporate tax rate ○ Tax exemptions ○ State and local incentives
Other	<ul style="list-style-type: none"> ○ Proximity to major markets ○ Cost of Land ○ Availability of land ○ Occupancy or construction costs ○ Availability of raw materials ○ Energy availability and costs ○ Environmental regulations ○ Proximity to suppliers ○ Proximity to technical university
Quality of Life	<ul style="list-style-type: none"> ○ Climate ○ Housing availability ○ Housing costs ○ Health facilities ○ Ratings of public schools ○ Cultural opportunities ○ Colleges and universities in area ○ Low crime rate

(Gambale et al. 2003)

(McQuaid et al. 2004) from empirical work in the United Kingdom simplifies the location decision into;

- Access to markets
- Availability of skilled labour
- Sufficient business accommodation
- Transport links

Porter's model of competitiveness draws on the relationship between the mix of conditions that are required to *attract and sustain competitive business*, and in particular the business environment and transport infrastructure (McQuaid et al. 2004). The theoretical model points out that transport infrastructure has the potential to enlarge a market, and subsequently, through increasing competition, can attract more businesses to the area. Transport infrastructure has a direct influence in business location decision through: *transport costs of goods, time costs and savings; certainty and reliability of travel time; the need to physically meet customers and suppliers; and staff and customer travel costs* (McQuaid et al. 2004). Also noted is the idea that *perceived accessibility may be as important as actual accessibility* (McQuaid et al. 2004).

4 Mapping Land Use Change

Land use data was obtained from the Department of Planning and Infrastructure (DPI) in the form of the *2001 Planning and Industrial Land Use Code* (PLUC) database. The DPI updated some areas within the precincts in 2003. The research team completed an audit of this data in May 2006 by visually inspecting the premises, signage, and address against the original data set. In cases when signage indicated multiple businesses were operating from single premises, all business names were retained or listed in the data set. Subsequently, an accurate, up-to-date, list of all businesses was created.

5 Survey of Businesses

5.1 Survey design and rationale

The Survey was designed to be mailed to the business owners within the precincts and then collected by the research team. The rationale for the survey collection was to increase the response rate through initiating commitment to the research. To further increase the potential response rate, the instrument needed to be clear and unimposing whilst still capturing the required data. The instrument was delivered using printed stationary from Curtin University bearing the names of all the partners in the research in an effort to signal a point of difference between this academic research and common market research. The layout of the survey was restricted to one A3 page front and back to avoid sections being lost and to appear unobtrusive. It was mailed with a covering letter.

5.2 Pilot Survey – approach, changes made

The pilot was conducted in a format representative of how the actual business survey will be conducted. The businesses that were selected for the pilot were outside the boundary of the Bullcreek precinct i.e. outside the 5 minute Drive. Two zones were selected to pilot, each representing a different type of business. They included a small Shopping centre in Murdoch that was initially within the boundary but fell outside once peak travel times were calculated.

23 businesses within the Winthrop shopping Centre and 17 businesses within the industrial area were sent surveys. The mail out was received by businesses on Wednesday 31st May with a covering letter explaining the broad intentions of the research project. There was no indication or explanation to the potential respondents that the survey was a pilot instrument. The letter indicated that the results were to be included in the final analysis.

The data base used for the mail merge was the 2001 Commercial and Industrial survey supplied by the Department of Planning and Infrastructure (DPI). As the purpose of the pilot was to sample the instrument, the address details of businesses were not updated. 40 surveys were mailed out to compensate for businesses that had relocated or moved or whose addresses were incorrect. As expected, several businesses were not at the addresses listed in the DPI survey, leaving a total of 30 businesses who could receive the survey.

A significant problem with the pilot was the number of businesses who claimed not to receive the letter and survey.

5.3 Winthrop Shopping Centre

- 6 of the 23 businesses did not operate from the listed address
- 10 out of the remaining 17 claimed not to receive the survey. These businesses were inter-dispersed among those who did receive the survey.
- 2 businesses were not trading at the time of survey collection.
- 4 businesses received the survey and completed it, although one had only been partially completed and was unable to be completed to the person responsible.
- 1 business did not receive the survey but wanted to, took a photocopy and then completed it.
- 2 businesses stated that their boss probably had it but could not be sure.
- This equates to a 57% response rate although the sample number is small and conversion to a % distorts the real numbers.

5.4 Myaree Industrial Area

- 4 of the 17 businesses in Myaree did not operate from the listed address
- 2 businesses claimed not to receive the survey.
- 1 business was unattended
- 4 businesses revealed that the mail person was not available and that they personally had no knowledge of the survey. 2 of these were busy and not interested in finding out if the survey had been received and completed.
- Of the remaining 6 businesses who received the survey, 4 chose not to complete it, 1 stated that it was mentioned but the boss probably had it and didn't know when they would return, 1 completed the survey.

5.5 Issues with administering the pilot

- Incorrect mailing details
- Person receiving mail being unavailable and no-one else knowing if the survey had been received, completed or disposed of

- People at the front of the business are not the people responsible for completing the survey with limited information regarding if the survey had been received and completed or disposed of.
- Lack of time for respondents to complete survey

5.6 Changes made to the final survey

- Points 1 will be addressed in the update of the *2001 Commercial Land Use Survey* that has been supplied by the DPI. All businesses names and addresses will be updated prior to the mail out of the survey.
- Instructions regarding leaving the survey at reception within the business for collection.
- Extending the time in which the respondent has to complete the survey will address time restrictions placed on business owner.
- Provide each business three visits to collect the survey.
- Leave a reminder letter detailing collection times with a prepaid envelope to increase response rate.

5.7 Issues highlighted in the responses from the pilot survey.

- Q3. 'Away' appears problematic. The question is sub-consciously linked by the respondent to Q1.
- Q7. Scaling numbers missing from one question
- Q8. Storage may be used in conjunction with warehouse so question is relevant to retailers.
- Q10. 'A combination of both' should be a 'combination of the above'
- Q13. Time scale and days of trade not appropriate for after hours traders
- Q15. Reads as privately owned vehicles
- Q16. Part B was not answered in each survey. Part A pollutes part B. It looks like there is an option to answer only one part of the question and part B instructions direct the response to one category only.

5.8 *Review following actual survey*

After wave 1 of the research, the following issues have been identified as problematic due to a lack of responses or through discussions between the researcher and respondent.

Part1 – About your previous address – The title created cause for respondents to ignore the whole section including the ‘tick box’ for *Newly created business*. It’s positioning next to Q2. created a feeling that the survey was only about businesses that had moved. Some respondents stated that it was irrelevant to them as they had always been in the same location. Long established businesses also felt reluctant to use the ‘tick box’ for *Newly created business* believing that it did not apply to them because they had been there for *n* years.

Q7. Categories for land use separation – categories that reflect all possible options including kitchen space, workshop, and production areas/

Q12. What are your busy periods? – It was felt by the researcher that this question was either difficult for people to comprehend or very simple to comprehend. Weekdays, Saturdays and Sunday headings were not large enough.

Q13. Where your staff live? – Many respondents did not complete section *B* of the question, particularly when their staff did not walk.

Q15. In relation to your company owned vehicles, how many of your staff have – some respondents did not include themselves in this count.

6 Survey Administration

The introductory letter was mailed out to every business within the precinct boundaries. The letter stated that the research was an Australian Research Council joint funded project and that results would be used to provide future transport planning guidance and that due to the questions being asked, there was an imperative that the owner or the person responsible for choosing the business location completes the survey. Date brackets and time brackets were given in which the researcher would visit to collect the collected survey. Contact numbers and assistance was offered in completing the survey. The introductory letter was supported by a media release in the relevant local paper for each precinct. Each business was visited three times over the course of three weeks. The second two visits were on a agreed day. Visits were made Monday to Friday 9am – 4pm and 6pm – 8pm for evening traders.

The response was as follows:

Precinct	Date bracket	<i>Total</i>
Bullcreek	22 nd June – 28 th June	170 (53%)
Cockburn Central	30 th June – 5 th July	197 (61%)
Wellard	6 th July – 12 th July	61 (41%)
Total		428 (54%)

Note: An additional two days were required for each precinct for return visits.

7 Research Findings: Land use change 2001 - 2006

The 2001 DPI Industrial Land Use Survey update and the updated database, completed May 2006, highlight the change in land use prior to the beginning of the research project.

There have been increases in all precincts with Cockburn Central experiencing the highest proportional growth of 45%. The increase in businesses brings numbers of businesses in Cockburn Central near to that of Bullcreek. An increase in the numbers of businesses in each precinct is shown in table (1) and figure (1).

Table (1) Business unit numbers by precinct 2001 & 2006

Precinct	Bullcreek	Cockburn Central	Wellard	Total
2001	281	224	133	638
2006	318	324	149	791
Change	13% increase	45% increase	12% increase	24% increase

Figure (1)

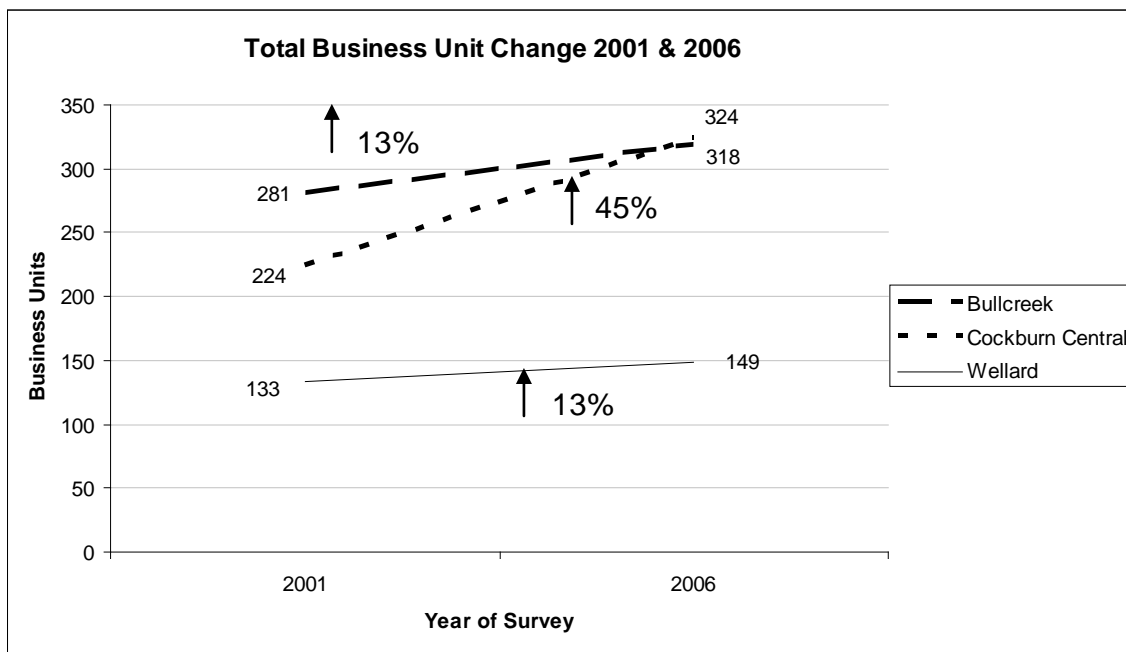
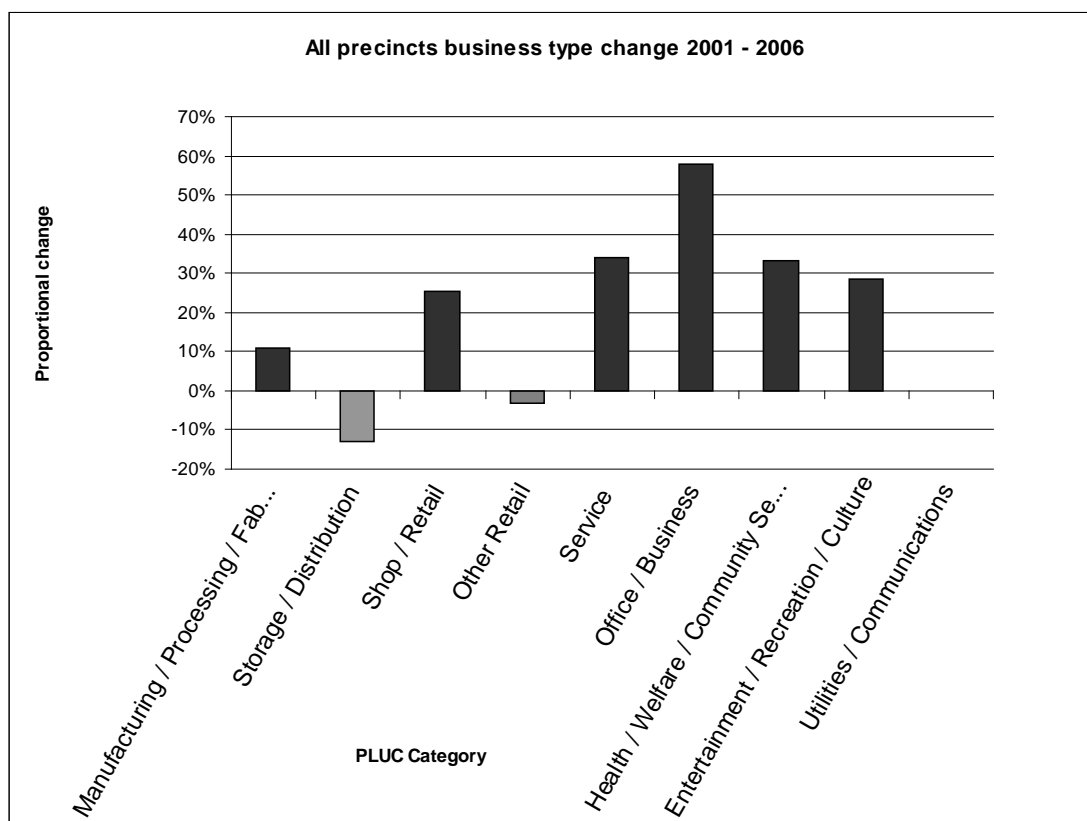


Figure 2 highlights general trends in business composition change. *Storage / distribution* have decreased by 10% and *other retail* marginally whilst all other categories have experienced significant growth with the exception of *Manufacturing / Processing / Fabrication*.

Figure (2)



7.1 Business land use composition – general trends

It should be noted that whilst the data is taken from DPI and closely represents the area surveyed, anomalies were highlighted during the questionnaire process. I.e. business owner's operating multiple business practices from a single site are essentially functioning as one entity with multiple products. These are recorded as separate entities on the DPI Industrial Land Use Survey database.

7.2 Manufacturing / Processing

Manufacturing has declined proportionally in both Bullcreek and Cockburn Central, although actual manufacturing business unit numbers have increased in Cockburn Central. Wellard does not have any *Manufacturing* within the study area.

7.3 Office / Business

Office space has increased 2.5 times in Cockburn Central and 1.5 times in Bullcreek. Wellard has had a slight increase in *Office space*.

7.4 Service Industry

Both Bullcreek and Cockburn Central have experienced growth in *service* sector business units, but proportionally, both have experienced a reduction. Wellard has remained very low.

7.5 Shop / Retail

Wellard is dominated by *retail* and *shopping centres*, accounting for 60% of business within the precinct. Whilst business units have increased since 2001, proportionally *Shop / Retail* have remained near 60%. Cockburn Central has had an increase of 34 *Shop / Retail* business units or 40%, although due to increases in other business types, proportionally *Shop / Retail* has fallen by 1.4%.

7.6 Summary

Between 2001 and 2006 there was an increase in real numbers of businesses across the three precincts of 153 businesses. Cockburn Central has experienced 45% growth, accounting for 94 of these businesses. Bullcreek had growth of 37 businesses operations whilst Wellard recorded the lowest with 16 additional businesses.

The most significant growth across all precincts has been in *Office / Business* operations with strong growth in most categories with the exception of *Manufacturing*, although over 10% growth was still recorded. *Storage / Distribution* had a significant decline as has *Other Retail*.

8 Travel Zones

Bullcreek station provides park and ride capability and transit interchange without mixed use development. Most of the businesses (95%) within the study area are located in the 5 minute drive time zone in the light industrial area of Willetton and surrounding suburbs. This spatial dislocation from the station provided the biggest challenge in gaining willing respondents. Many of those that refused to participate in the survey stated that the station and the railway were by no means relative to them or their business.

Cockburn Central provides a TOD that demonstrates characteristics of both a TOD with an activity centre, and also a moderate level of motor vehicle interchange opportunities. New developments associated with station have impacted on the numbers of businesses within the closest distance bands. Of the three precincts, Cockburn Central is the only station that had a sample in the 5, 5 – 10 minute walk time zones.

Wellard is an example of the theoretical archetypal TOD in a new urbanist village in that it provides a very high level of pedestrian amenity with mixed use development and low levels of vehicle interchange opportunities. It is a Greenfield site that is currently under construction. Subsequently, 100% of the sample was in the 5 minute drive time zone and generally in the established Kwinana Town site.

9 Business land use composition by complex 2006 and precinct description

Businesses within the precincts are generally located some distance from the future train station. Table 1a is a summary of businesses in all three precincts and the distribution within the travel zones.

Table (1a)

PRECINCT_CODE* time_Zone Crosstabulation

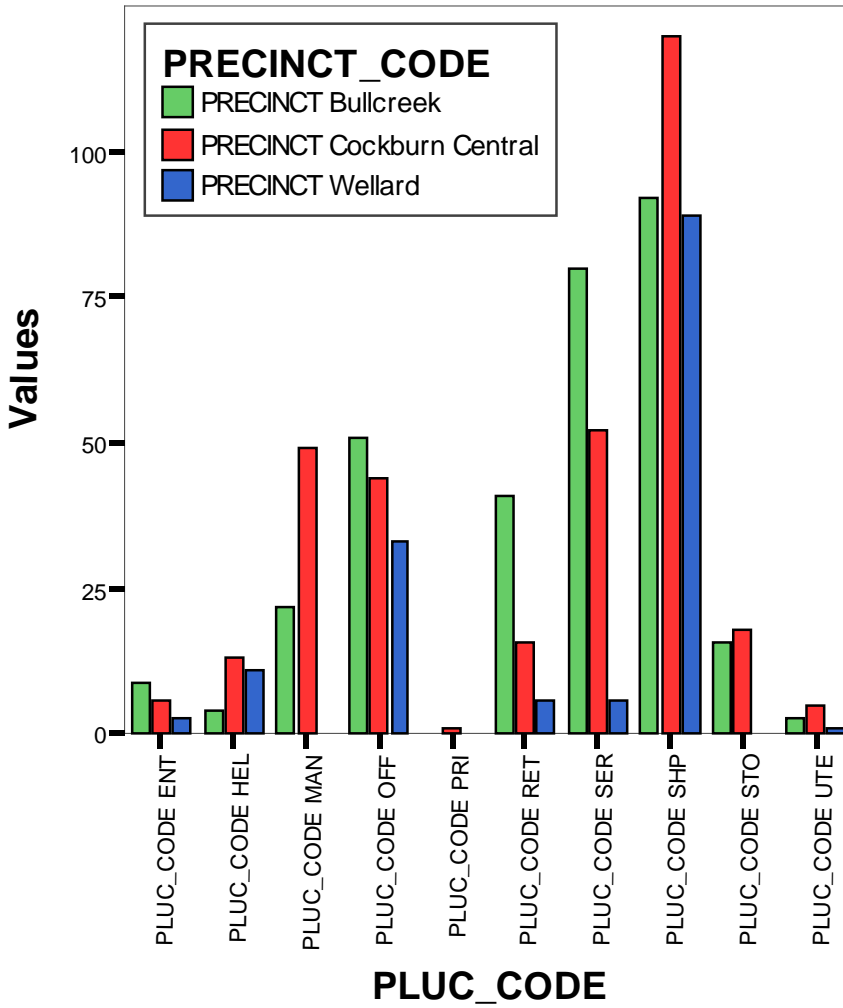
Count		time_Zone				Total
		5 minute walk	5 - 10 minute walk	10 - 15 minute walk	5 minute drive	
PRECINCT	Bullcreek	0	0	14	304	318
	Cockburn Central	5	64	43	212	324
	Wellard	0	0	0	149	149
Total		5	64	57	665	791

The 2006 composition of land uses for each precinct is shown in Figure (4). Retail and *Shop / Retail* dominate each precinct although Cockburn Central shows a more *Manufacturing* than the other precincts.

Figure (3)

BUSINESS UNITS PER PRECINCT

Statistics : Count



9.1 Bullcreek Summary

The Bullcreek precinct has three neighbourhood shopping centres. The number of business units in each of these is limited by the existing building stock. Both Rossmoyne and Mt. Pleasant have traditional business operations expected in a local shopping centre. Shelley shopping centre has a small number of local retail outlets but also has several businesses that fall within the Entertainment / Recreation / Culture. The higher numbers of these businesses in this centre has the potential to influence the associated travel behaviour.

The light industrial area in Willetton accounts for 86% of the businesses within the precinct. The industrial area is bounded by residential on one side and strip shopping centres on the other. It is evident that small single lot redevelopments within the industrial area are affecting business type frequencies and while service businesses dominate the industrial area, an increase in office based business is apparent. The strip shopping centres along high road are dominated by other retail. Table 2 summarises the compositions of the Bullcreek precinct.

Table (2) Bullcreek precinct business unit summary

Suburb	Complex type	Distance Band	Business Units	% of total Business units
Mt. Pleasant	Local shopping	10 - 15 min walk	16	5%
Rossmoyne	Local shopping	5 min drive	11	4%
Shelley	Local shopping	5 min drive	18	6%
Willetton	Light industrial / strip shopping / Local shopping	5 min drive	273	86%

9.2 Cockburn Central Summary

Cockburn Central has had the most significant increase in business unit numbers of the 3 precincts. Jandakot West is the original Jandakot industrial area and lies west of the Cockburn Central train station. Jandakot East is a new light industrial area still in development stage. Both areas are within walking distance of the Cockburn Central station. Table 3 summarises the compositions of the Cockburn Central precinct.

Table (3) Cockburn Central precinct business unit summary

Suburb	Complex type	Distance Band	Business Units	% of total Business units
Atwell	Local shopping	5 min drive	18	5%
Gateway	Regional shopping	5 - 10 min walk	38	12%
Jandakot North	Mixed business strip ¹	10 min walk - 5 min drive	11	3%
Jandakot East	Light industrial	5 min walk - 5 min drive	58	18%
Jandakot West	Light industrial	10 min walk - 5 min drive	109	34%
Lakeland	Local shopping	5 min drive	11	3%
Lakes	Local shopping	5 min drive	34	10%
Southgate Commercial	Regional shopping	5 - 10 min walk	19	6%
Southlake	Local shopping	5 min drive	19	6%
Yangebup	Local shopping	5 min drive	7	2%

1. Jandakot North refers to business activities along North Lake Road including Berrigan Dve, but excludes shopping centres.

9.3 Wellard Summary

The Kwinana Hub Shopping Centre is the focal point of business activities within the precinct of Wellard. Kwinana Hub is a regional shopping centre that is surrounded by strip shopping centres that offer a diverse range of services and office uses. Table 43 summarises the compositions of the Wellard precinct.

Table (4) Wellard precinct business unit summary

Suburb	Complex type	Distance Band	Business Units	% of total Business units
Calista Ave ¹	Standalone mixed business	5 min drive	10	7%
Kwinana Centre ²	Regional shopping	5 min drive	101	68%
Stargate	Local shopping	5 min drive	12	8%
Ridley Green	Local shopping	5 min drive	17	11%
Parmelia Ave	Local shopping	5 min drive	7	5%
Wellard Ave	Other	5 min drive	2	1%

1. Calista Ave includes all business activities on Calista Avenue within the study area.
2. Kwinana Centre refers to business activities bounded by Meares, Gilmore Chisham, and Challenger Avenues. It includes shopping centres and standalone business operations.

9.4 Summary

Bullcreek has no commercial activities near to the station. The majority of business activities are located in the Willetton area. Cockburn Central has a high level of industrial and commercial land uses within close proximity to the station. It also has a new light industrial development in East Jandakot and a new big box retail complex in the 5 – 10 minute walk zone. Wellard currently has no businesses surrounding the station due to it being a new

development. This should change over the course of this research. Existing businesses surveyed are generally retail centres.

10 Business Survey

All tables and graphic depictions in this section refer only to business units that took part in the 2006 Business Survey.

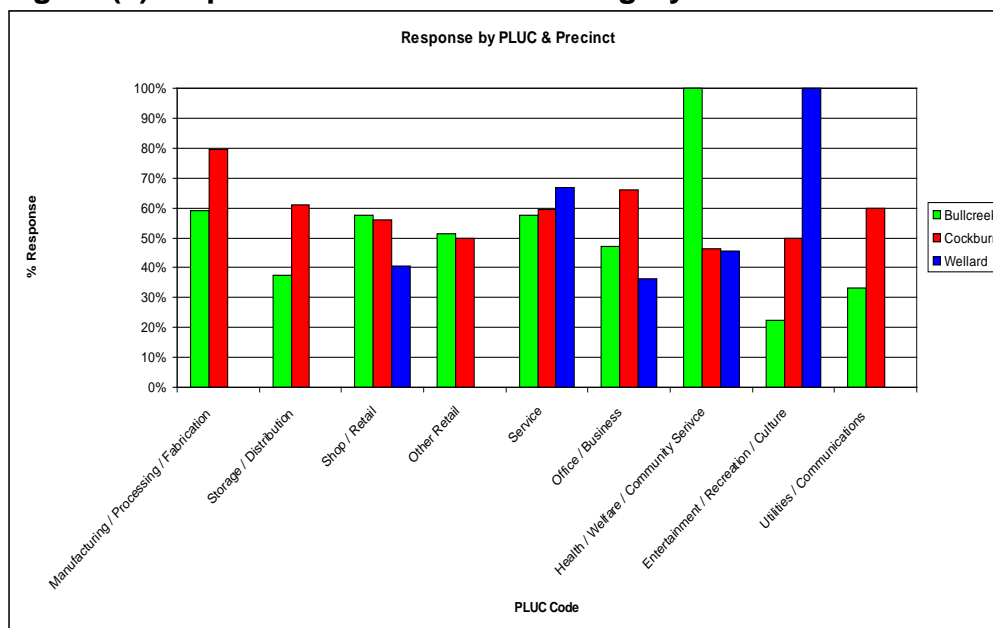
10.1 Business characteristics

Table (5) details the number of business units within each PLUC category that participated in the 2006 Business survey. Cockburn Central had a highest representation (20%) compared to Bullcreek (8%) and Wellard (0%) of *manufacturing* businesses by virtue of the composition of the businesses within the precinct area. Bullcreek, likewise, had the highest representation (27%) of *service industry* respondents compared to Cockburn (16%) and Wellard (7%). Wellard had the largest *shop/retail* (59%) response due to the Kwinana Hub Shopping centre dominating the business composition within the Wellard precinct. Bullcreek *shop/retail* responses were (31%) whilst Cockburn was (34%). Figure (3) shows the response rate for each PLUC category as a percentage of total businesses.

Table (5)

		Business type				Total
		Precinct				
		Bullcreek	Cockburn Central	Wellard		
Business type (PLUC categories)	Manufacturing / Processing / Fabrication	Count	13	39	0	52
		%	7.6%	19.8%	.0%	12.1%
	Storage / Distribution	Count	6	11	0	17
		%	3.5%	5.6%	.0%	4.0%
	Service Industry	Count	46	31	4	81
		%	27.1%	15.7%	6.6%	18.9%
	Shop / Retail	Count	53	67	36	156
		%	31.2%	34.0%	59.0%	36.4%
	Other Retail	Count	21	8	0	29
		%	12.4%	4.1%	.0%	6.8%
	Office / Business	Count	24	29	12	65
		%	14.1%	14.7%	19.7%	15.2%
	Health / Welfare / Community Service	Count	4	6	5	15
		%	2.4%	3.0%	8.2%	3.5%
	Entertainment / Recreation / Culture	Count	2	3	4	9
		%	1.2%	1.5%	6.6%	2.1%
	Utilities / Communications	Count	1	3	0	4
		%	.6%	1.5%	.0%	.9%
Total	Count	170	197	61	428	
	%	100.0%	100.0%	100.0%	100.0%	

Figure (4) response as a % of PLUC category



10.1.1 Established Business

Established business refers to a business that has not relocated from elsewhere to its current location. Bullcreek is a well established area and accordingly the businesses that are located within the precinct are also well established. The results show Bullcreek to have a close to balance of established businesses (54%) and business that have relocated from elsewhere (46%). Cockburn Central is also an established area although it has several new development sites within the precinct. Cockburn Central's higher proportion of established businesses (62%) relates to the recent development opportunities that have been released in the industrial area in Jandakot East and Gateways Shopping Centre that is within the 10 – 15 minute walk band.

The Kwinana Hub Shopping Centre that is within the Wellard study area and provides most of the businesses that makes up the sample. Lower proportional levels of property ownership and very high levels of shop/retail may induce a higher turnover of small retailers. Newly created businesses account for 75% of businesses.

10.1.2 Tenure type

Tenure type was categorised into three types. Purchased or being purchased and short (5 years or less) and long term leases (more than 5 years). Bullcreek has the highest proportional level of purchased or being purchased businesses (36%) whilst Wellard has the lowest (18%). Wellard also has the highest long term leases (41%).

10.1.3 Duration of stay in precinct

Bullcreek and Wellard have the highest proportional level of businesses that have been at their current address for more than 10 years. A recent increase in Cockburn Central's business unit numbers is highlighted by the high levels of businesses in the 0 – 1 & 1 – 3 years categories. 34% of businesses that have been located in Cockburn Central for less than 3 years are located within a 15 minute walk or less to the station. The high levels of businesses new to locations in Cockburn Central may be a result of relocations from the inferior quality buildings in Jandakot West to the new developments in Jandakot East. Wellard also has high levels of businesses in the 1-3 years categories although this may be due a high turnover of retailers rather than new property releases. Table (6) shows the newly located businesses within each precinct by distance band.

Table (6)

2006 - Years at current address by distance band								
Precinct	Distance Band		Years at current address_COMPACT					Total
			0 - 1 yrs	1 - 3 yrs	3 - 5 yrs	5 - 10 yrs	10 - 60 yrs	
Bullcreek	5 minute walk zone	Count						
		%						
	10 minute walk zone	Count						
		%						
	15 minute walk zone	Count	0	1	0	7	2	10
		%	.0%	10.0%	.0%	70.0%	20.0%	100.0%
	5 minute drive zone	Count	18	25	26	35	54	158
		%	11.4%	15.8%	16.5%	22.2%	34.2%	100.0%
	Total	Count	18	26	26	42	56	168
		%	10.7%	15.5%	15.5%	25.0%	33.3%	100.0%
Cockburn Central	5 minute walk zone	Count	0	1	0	0	1	2
		%	.0%	50.0%	.0%	.0%	50.0%	100.0%
	10 minute walk zone	Count	5	11	5	19	2	42
		%	11.9%	26.2%	11.9%	45.2%	4.8%	100.0%
	15 minute walk zone	Count	8	4	1	4	6	23
		%	34.8%	17.4%	4.3%	17.4%	26.1%	100.0%
	5 minute drive zone	Count	19	28	12	36	30	125
		%	15.2%	22.4%	9.6%	28.8%	24.0%	100.0%
	Total	Count	32	44	18	59	39	192
		%	16.7%	22.9%	9.4%	30.7%	20.3%	100.0%
Wellard	5 minute walk zone	Count						
		%						
	10 minute walk zone	Count						
		%						
	15 minute walk zone	Count						
		%						
	5 minute drive zone	Count	10	9	5	11	23	58
		%	17.2%	15.5%	8.6%	19.0%	39.7%	100.0%
	Total	Count	10	9	5	11	23	58
		%	17.2%	15.5%	8.6%	19.0%	39.7%	100.0%

10.2 Location

10.2.1 Reason for moving

Those respondents that are not classified as *established* businesses are those that moved from another location to their current location but continued to operate the same business.

Number of existing businesses responses that relocated from another address to their current address

Bullcreek 46% (78 business units)

Cockburn Central 38% (74 business units)

Wellard 25% (15 business units)

48% of all businesses relocated due to The Premises were not suitable for expansion. 18% of businesses relocated for other reasons which included agreements between landlords and

businesses, and relative location to proprietors home. Within the Other Retail sector, 25% of relocations occurred because of leases becoming unaffordable.

10.3 Why I chose my current business location?

This was a selection of questions presented with a Likert scale to capture the level of importance placed on attributes of a location. The top 5 responses for all precincts are presented in table (7).

Table (7)

All precincts top 5 reasons why I chose my current business location	
It is a growing area	64%
It offers exposure to potential customers	58%
It provides ample parking opportunities	53%
The business needs to be on a busy road	53%
It is close to my customers	51%

Table (8) shows the top 5 reasons why business owners selected the location within each of the precincts. *Attributes in bold italics represent those that are unique to that precinct.* Cockburn Central displayed strong responses (75%) in decisions related to the growth of the area as did Wellard (82%). Wellard also scored stronger than the other precincts in its potential customer exposure. This may be related to its bias towards retail operations and the dominance of Kwinana’s big box retail that is a sub regional centre.

Table (8)

Individual precincts top 5 reasons why I chose my current business location	
Bullcreek	
It offers exposure to potential customers	53%
It provides ample parking opportunities	52%
It is close to my customers	50%
<i>The local community facilities were good¹</i>	50%
<i>The visual appeal of the area was good¹</i>	49%
Cockburn Central	
It is a growing area	75%
It offers exposure to potential customers	55%
<i>The quality of the building was favourable¹</i>	49%
It provides ample parking opportunities	48%
<i>It is close to the home of the proprietor¹</i>	47%
Wellard	
It offers exposure to potential customers	82%
It is a growing area	82%
It provides ample parking opportunities	74%
It is close to my customers	72%
<i>It is an easy walk to a bus station¹</i>	64%

1. Attribute unique to top 5 in precinct.

The responses were categorised into four recognised planning phenomena; Infrastructure, Transport, Economics and Spatial Distribution (Proximity). The responses were then given a mean ranking (see table 9.). Although close in distribution, Infrastructure had the highest mean ranking, whilst '*It's a growing area*' scored the highest individual response.

Table (9)

All precincts top 3 reasons why I chose my current business decision category	
Infrastructure	
Favourable quality of the building	3.6
Good local community facilities	3.5
Good visual appeal of the area	3.5
<i>All factors average</i>	3.4
Transport	
Exposure to potential customers	3.9
Ample parking opportunities	3.6
Easy walk to a bus station	3.3
<i>All factors average</i>	3.2
Economics	
A growing area	4.0
Good investment area future capital return	3.7
Favourable Lease /rental price	3.5
<i>All factors average</i>	3.1
Proximity	
Close to customers	3.8
Close to proprietors home	3.5
Close to Regional Centre	2.8
<i>All factors average</i>	3.0

The final question of the Likert scaled business location section related to perceived growth opportunities that the Perth to Mandurah Rail Line may offer businesses and how this factored into location decisions. Generally businesses disagreed that they located in the precinct because of growth opportunities (See figure 3.). However, when the results are presented for each precinct, (figure 4.), it shows that a higher proportional number of Wellard businesses factored into their location choice, the proximity of the rail stations and the potential for growth that the stations will offer. Interestingly all businesses within the Wellard precinct are in the 5 minute drive time band. Bullcreek showed a proportionally low number of businesses that located within the precinct due to the potential for growth that the stations offer. This may be due to the relative age of the businesses and the spatial dislocation from the station in Bullcreek. Cockburn Central was placed in between the two extremes. If the results are a true

indication of location decisions, Wellard business owners have a very good expectation that the new rail line will have positive growth results for their businesses.

Figure (5)

The Perth to Mandurah rail line will grow business opportunities

ALL PRECINCTS

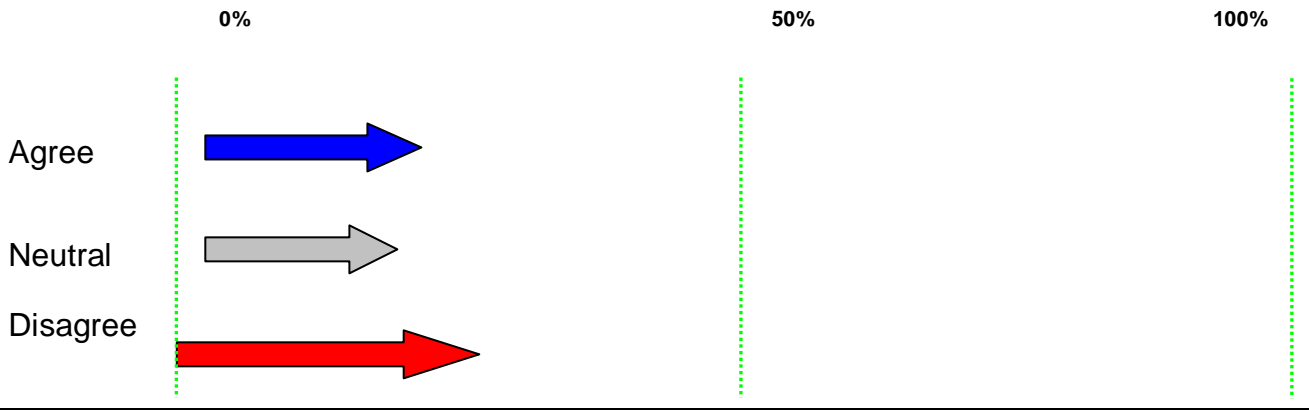
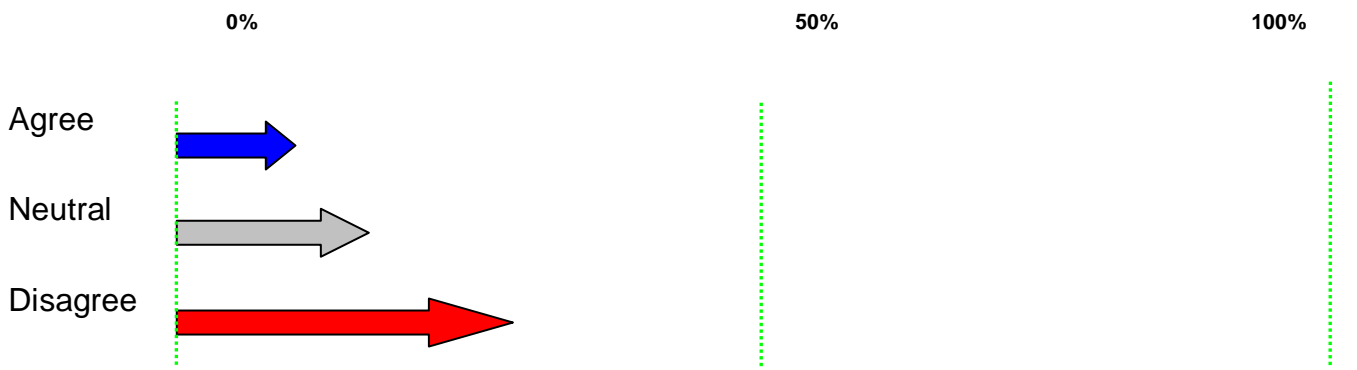


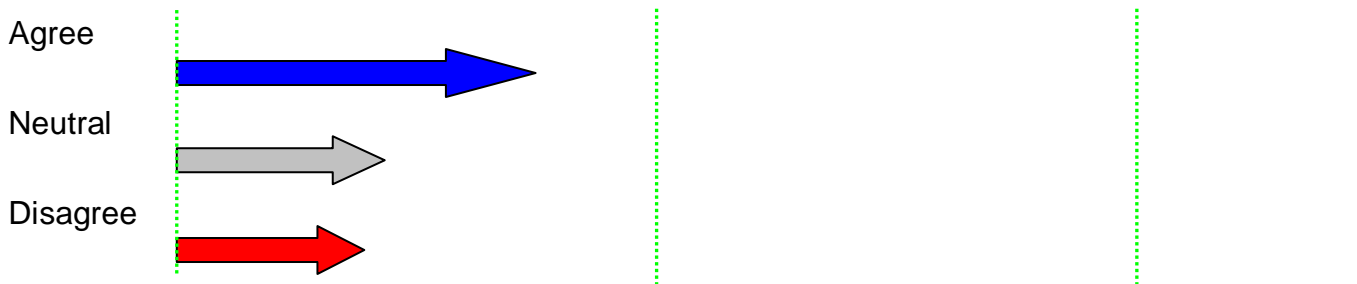
Figure (6)

The Perth to Mandurah rail line will grow business opportunities by precinct

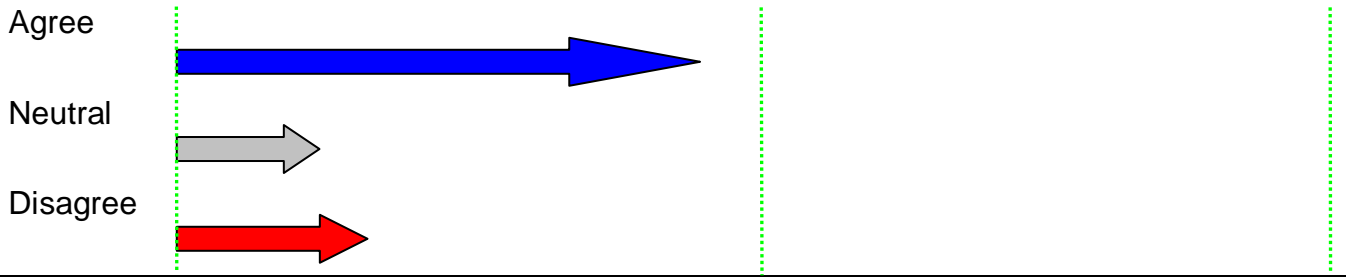
BULLCREEK



COCKBURN CENTRAL



WELLARD



The following tables relate to the remaining components of the Likert scaled question relating to business location. A table of responses follows in each section

10.3.1 It is close to customers (Table 10.)

Wellard had the highest response of agree 72% which correlates to the high levels of retail in the precinct. Bullcreek and Cockburn Central have a higher level of *Service Industry*, *Manufacturing* and *Storage* business units potentially reducing the need to locate close to a customer base. This statement was considered the fifth highest locational priorities across all precincts.

Table (10)

		Close to customers						
		Close to customers						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	12	39	85	28	6	170
		%	7.1%	22.9%	50.0%	16.5%	3.5%	100.0%
	Cockburn Central	Count	21	34	91	36	15	197
		%	10.7%	17.3%	46.2%	18.3%	7.6%	100.0%
	Wellard	Count	3	8	44	4	2	61
		%	4.9%	13.1%	72.1%	6.6%	3.3%	100.0%
Total		Count	36	81	220	68	23	428
		%	8.4%	18.9%	51.4%	15.9%	5.4%	100.0%

10.3.2 It is close to my suppliers (Table 11.)

There were low responses in agreement for Bullcreek (16%) and Cockburn Central (13%) whilst *not applicable*, *Neutral*, and *Disagree* made up 80% of the response. Wellard's response (2%) was lowest which may be reflective of the retail sectors dominance in this area and reflective of its broad distribution networks.

Table (11)

		Close to suppliers						
		Close to suppliers					Total	
		Disagree	Neutral	Agree	Not Applicable	No response		
Precinct	Bullcreek	Count	42	47	28	44	9	170
		%	24.7%	27.6%	16.5%	25.9%	5.3%	100.0%
	Cockburn Central	Count	53	48	26	54	16	197
		%	26.9%	24.4%	13.2%	27.4%	8.1%	100.0%
	Wellard	Count	29	12	1	15	4	61
		%	47.5%	19.7%	1.6%	24.6%	6.6%	100.0%
Total		Count	124	107	55	113	29	428
		%	29.0%	25.0%	12.9%	26.4%	6.8%	100.0%

10.3.3 It is close to the home of the proprietor (Table 12)

An overall response of 44% indicates the importance placed on spatial proximity to the proprietors' home. Wellard had a slightly reduced (33%) *Agree* response which may be indicative of the retail sector having a higher proportion of corporate owned business units.

Table (12)

		Close to proprietors home						
		Close to proprietors home					Total	
		Disagree	Neutral	Agree	Not Applicable	No response		
Precinct	Bullcreek	Count	29	28	78	27	8	170
		%	17.1%	16.5%	45.9%	15.9%	4.7%	100.0%
	Cockburn Central	Count	36	19	92	38	12	197
		%	18.3%	9.6%	46.7%	19.3%	6.1%	100.0%
	Wellard	Count	21	10	20	8	2	61
		%	34.4%	16.4%	32.8%	13.1%	3.3%	100.0%
Total		Count	86	57	190	73	22	428
		%	20.1%	13.3%	44.4%	17.1%	5.1%	100.0%

10.3.4 It is close to competing businesses (Table 13)

Wellard's high level of retail business units again contributes to the high response rate in this category. Most (85% or more) of Bullcreek and Cockburn Central business units considered spatial proximity to competing businesses either not *relevant*, *neutral* or *disagreed*.

Table (13)

		Close to competitors					Total	
		Close to competitors						
		Disagree	Neutral	Agree	Not Applicable	No response		
Precinct	Bullcreek	Count	55	47	25	35	8	170
		%	32.4%	27.6%	14.7%	20.6%	4.7%	100.0%
	Cockburn Central	Count	63	53	20	48	13	197
		%	32.0%	26.9%	10.2%	24.4%	6.6%	100.0%
	Wellard	Count	24	14	14	5	4	61
		%	39.3%	23.0%	23.0%	8.2%	6.6%	100.0%
Total		Count	142	114	59	88	25	428
		%	33.2%	26.6%	13.8%	20.6%	5.8%	100.0%

10.3.5 It is close to Jandakot airport (Table 14)

Bullcreek and Cockburn Central had low *Agree* responses (8%) for this category whilst Wellard had high response in the *disagree* category. The airport fits geographically between the two industrial areas with each of the industrial areas accommodating higher levels of *manufacturing / service industry* business units and potentially servicing mining operations that require the use of light aircraft.

Table (14)

		Close to Jandakot Airport					Total	
		Close to Jandakot Airport						
		Disagree	Neutral	Agree	Not Applicable	No response		
Precinct	Bullcreek	Count	59	22	13	68	8	170
		%	34.7%	12.9%	7.6%	40.0%	4.7%	100.0%
	Cockburn Central	Count	63	32	15	75	12	197
		%	32.0%	16.2%	7.6%	38.1%	6.1%	100.0%
	Wellard	Count	35	4	0	18	4	61
		%	57.4%	6.6%	.0%	29.5%	6.6%	100.0%
Total		Count	157	58	28	161	24	428
		%	36.7%	13.6%	6.5%	37.6%	5.6%	100.0%

10.3.6 It is close to Perth CBD (Table 15)

Bullcreek and Cockburn Central shared a similar level of response across each category, with the majority of responses (27%) stating that the Perth CBD was not a locational factor. Wellard had most responses (55%) in *disagree* that the proximity to the CBD was a factor in their location choice. Their stronger feelings may be due to the spatial dislocation that Wellard experiences as the further the precinct is away from the CBD, the lower the *Agree* response.

Table (15)

		Close to Perth CBD						
		Close to Perth CBD						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	36	40	41	46	7	170
		%	21.2%	23.5%	24.1%	27.1%	4.1%	100.0%
	Cockburn Central	Count	46	42	43	54	12	197
		%	23.4%	21.3%	21.8%	27.4%	6.1%	100.0%
	Wellard	Count	34	10	2	11	4	61
		%	55.7%	16.4%	3.3%	18.0%	6.6%	100.0%
Total		Count	116	92	86	111	23	428
		%	27.1%	21.5%	20.1%	25.9%	5.4%	100.0%

10.3.7 It is close to a regional centre (Eg Fremantle) (Table 16)

A similar pattern to *Close to Perth CBD* emerged from this response although Cockburn Central responses were higher than Bullcreek possibly due to its locational advantage to Fremantle over Bullcreek. Wellard had a slight reduction in responses from *disagree* and an increase of 10% in *agree* in relation to the Perth CBD, although the total *agree* response was still low (13%). The Kwinana Hub is identified as a Regional Centre and falls within the study area of the Wellard station, accommodating 68% of the businesses within the precinct.

Table (16)

		Close to Regional Centre						
		Close to Regional Centre_3						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	38	45	35	45	7	170
		%	22.4%	26.5%	20.6%	26.5%	4.1%	100.0%
	Cockburn Central	Count	41	43	52	49	12	197
		%	20.8%	21.8%	26.4%	24.9%	6.1%	100.0%
	Wellard	Count	26	11	8	12	4	61
		%	42.6%	18.0%	13.1%	19.7%	6.6%	100.0%
Total		Count	105	99	95	106	23	428
		%	24.5%	23.1%	22.2%	24.8%	5.4%	100.0%

10.3.8 It is near a pool of employees (table 17)

Generally *locating near to a pool of employees* was not a significant factor in location choice. Wellard (25%) returned a slightly higher *agree* response than Bullcreek (18%) and Cockburn Central (17%). Higher levels of unskilled labour required resulting from the dominance of the retail industry may be a contributing factor in these responses.

Table (17)

		Close to pool employees						
		Close to pool employees						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	50	37	31	46	6	170
		%	29.4%	21.8%	18.2%	27.1%	3.5%	100.0%
	Cockburn Central	Count	44	55	33	53	12	197
		%	22.3%	27.9%	16.8%	26.9%	6.1%	100.0%
	Wellard	Count	16	18	15	9	3	61
		%	26.2%	29.5%	24.6%	14.8%	4.9%	100.0%
Total		Count	110	110	79	108	21	428
		%	25.7%	25.7%	18.5%	25.2%	4.9%	100.0%

10.3.9 It is accessible to freight rail network (Table 18)

Generally the *agree* responses were very low. Cockburn Central responses (6%) were double that of Bullcreek and Wellard. It should be noted that sidings that once operated on the line that passes through this area of Perth have been removed, limiting local access to the freight rail network.

Table (18)

		Access to freight rail network						
		Access to freight rail network						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	56	35	5	64	10	170
		%	32.9%	20.6%	2.9%	37.6%	5.9%	100.0%
	Cockburn Central	Count	68	29	12	75	13	197
		%	34.5%	14.7%	6.1%	38.1%	6.6%	100.0%
	Wellard	Count	24	9	2	22	4	61
		%	39.3%	14.8%	3.3%	36.1%	6.6%	100.0%
Total		Count	148	73	19	161	27	428
		%	34.6%	17.1%	4.4%	37.6%	6.3%	100.0%

10.3.10 It is close to a regional road with good connections to the seaport/major airport (Table 19)

Bullcreek (31%) and Cockburn Central (31%) had higher *agree* responses than Wellard (20%) which may be indicative of the transport requirements in areas of higher *manufacturing* and *service* related industries.

Table (19)

		Close to Regional Road						
		Close to Regional Road						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	33	35	52	42	8	170
		%	19.4%	20.6%	30.6%	24.7%	4.7%	100.0%
	Cockburn Central	Count	33	37	61	54	12	197
		%	16.8%	18.8%	31.0%	27.4%	6.1%	100.0%
	Wellard	Count	19	9	12	16	5	61
		%	31.1%	14.8%	19.7%	26.2%	8.2%	100.0%
Total		Count	85	81	125	112	25	428
		%	19.9%	18.9%	29.2%	26.2%	5.8%	100.0%

10.3.11 It offers exposure to potential customers (table 20)

58% of all respondents agreed that exposure to potential customers was an import factor in their decision to locate their business. Wellard's high *agree* response (82%) suggests that they also factor in the benefits of being part of a big box retail centre with high pedestrian traffic. This was the second highest factor in location decisions across all precincts.

Table (20)

		Exposure to potential customers						
		Exposure to potential customers					Total	
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	17	32	90	23	8	170
		%	10.0%	18.8%	52.9%	13.5%	4.7%	100.0%
	Cockburn Central	Count	29	23	108	23	14	197
		%	14.7%	11.7%	54.8%	11.7%	7.1%	100.0%
	Wellard	Count	0	6	50	1	4	61
		%	.0%	9.8%	82.0%	1.6%	6.6%	100.0%
Total		Count	46	61	248	47	26	428
		%	10.7%	14.3%	57.9%	11.0%	6.1%	100.0%

10.3.12 Business is a multiple outlet operation and presence in this location fit into the business strategy (Table 21)

Variation in responses across all precincts was minimal. A 24% average of *agree* responses suggests that a quarter of businesses strategically located in their current location. 45% of responses were *Not applicable* or *No response* suggesting that reasons other than strategic spatial market positions were considered.

Table (21)

		Part of multiple outlet operation						
		Part of multiple outlet operation					Total	
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	28	22	39	73	8	170
		%	16.5%	12.9%	22.9%	42.9%	4.7%	100.0%
	Cockburn Central	Count	39	20	49	72	17	197
		%	19.8%	10.2%	24.9%	36.5%	8.6%	100.0%
	Wellard	Count	10	11	16	17	7	61
		%	16.4%	18.0%	26.2%	27.9%	11.5%	100.0%
Total		Count	77	53	104	162	32	428
		%	18.0%	12.4%	24.3%	37.9%	7.5%	100.0%

10.3.13 The lease / rental price was favourable (Table 22)

The mean and highest response was *Agree* (41%). Wellard responses were the highest with 59% of responses in agreement. Cockburn Central was lowest with 35% of responses in agreement and scored highest for responses that disagreed (14%).

Table (22)

		Favourable Lease /rental price						
		Favourable Lease /rental price						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	20	31	70	36	13	170
		%	11.8%	18.2%	41.2%	21.2%	7.6%	100.0%
	Cockburn Central	Count	28	37	69	50	13	197
		%	14.2%	18.8%	35.0%	25.4%	6.6%	100.0%
	Wellard	Count	4	10	36	9	2	61
		%	6.6%	16.4%	59.0%	14.8%	3.3%	100.0%
Total		Count	52	78	175	95	28	428
		%	12.1%	18.2%	40.9%	22.2%	6.5%	100.0%

10.3.14 The price of the land was favourable (Table 23)

Cockburn Central (27%) and Bullcreek (24%) scored considerably more than Wellard (15%). This may be related to lower ownership rates and higher rate of *Short term lease* experienced in the Wellard precinct and is also supported by the previous questions responses regarding costs of leases and rent.

Table (23)

		Favourable price of land						
		Favourable price of land						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	11	21	41	87	10	170
		%	6.5%	12.4%	24.1%	51.2%	5.9%	100.0%
	Cockburn Central	Count	21	22	54	83	17	197
		%	10.7%	11.2%	27.4%	42.1%	8.6%	100.0%
	Wellard	Count	5	10	9	31	6	61
		%	8.2%	16.4%	14.8%	50.8%	9.8%	100.0%
Total		Count	37	53	104	201	33	428
		%	8.6%	12.4%	24.3%	47.0%	7.7%	100.0%

10.3.15 It offers floor/land space for expansion (Table 24)

Cockburn Central responses in agreement were highest (34%) whilst Bullcreek was 27% and Wellard 25%. Of all responses, 24% considered that *Floor/land space for expansion* was not applicable and 25% *disagreed* that they located for this reason.

Table (24)

		Offers floor space/land for expansion						
		Offers floor space/land for expansion						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	47	27	45	42	9	170
		%	27.6%	15.9%	26.5%	24.7%	5.3%	100.0%
	Cockburn Central	Count	41	33	67	47	9	197
		%	20.8%	16.8%	34.0%	23.9%	4.6%	100.0%
	Wellard	Count	17	11	15	15	3	61
		%	27.9%	18.0%	24.6%	24.6%	4.9%	100.0%
Total		Count	105	71	127	104	21	428
		%	24.5%	16.6%	29.7%	24.3%	4.9%	100.0%

10.3.16 The quality of the building was favourable (Table 25)

The overall *agree* responses of 47% were more than double the responses of *neutral* and nearly four times that of *disagree*. Cockburn Central was above the average with 49% of responses in agreement. This may be, in part, due to the development of Jandakot East light industrial area, the relative newness of Gateways Shopping Centre and one local neighbourhood shopping centre as well as new development of small secondary commercial premises along Northlake road.

Table (25)

		Favourable quality of the building						
		Favourable quality of the building						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	27	33	79	24	7	170
		%	15.9%	19.4%	46.5%	14.1%	4.1%	100.0%
	Cockburn Central	Count	17	41	97	32	10	197
		%	8.6%	20.8%	49.2%	16.2%	5.1%	100.0%
	Wellard	Count	7	17	26	7	4	61
		%	11.5%	27.9%	42.6%	11.5%	6.6%	100.0%
Total		Count	51	91	202	63	21	428
		%	11.9%	21.3%	47.2%	14.7%	4.9%	100.0%

10.3.17 Land was readily available (Table 26)

Most (43%) of all business responses were *not applicable*. This would suggest that in almost half of the cases, there were location options at the time of locating the business. Cross tabulation with *Years at Current* address shows a correlation in the *availability of land* to business location decisions in businesses that located more than 10 years ago. This is supported by the *disagree* responses that concur with this assessment.

Table (26)

		Land was readily available						
		Land was readily available						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	22	26	29	83	10	170
		%	12.9%	15.3%	17.1%	48.8%	5.9%	100.0%
	Cockburn Central	Count	25	27	58	74	13	197
		%	12.7%	13.7%	29.4%	37.6%	6.6%	100.0%
	Wellard	Count	9	7	12	28	5	61
		%	14.8%	11.5%	19.7%	45.9%	8.2%	100.0%
Total		Count	56	60	99	185	28	428
		%	13.1%	14.0%	23.1%	43.2%	6.5%	100.0%

10.3.18 It is a growing area (Table 27)

This question had the highest response in *agree* across all precincts with the exception of Bullcreek. Wellard had the highest *agree* response (82%), despite the Kwinana Hub Shopping Centre being spatially dislocated from both the Wellard and Kwinana stations. *Growth* is seen as growth in the housing sector with beneficial economic outcomes for the predominantly retail focussed businesses. There are no significant commercial infrastructure projects being completed. Cockburn Central respondents (75%) also considered the growth of the area when choosing to locate their business. Bullcreek had the most *disagree*, *Neutral* and *Not applicable* responses. This is related to the age of the industrial area (Willetton) and the perceived stagnation of growth in the areas immediately surrounding the industrial area. No discernable correlations can be seen when cross tabulations with *years at current address* are performed.

Table (27)

		A growing area						
		A growing area						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	20	46	76	21	7	170
		%	11.8%	27.1%	44.7%	12.4%	4.1%	100.0%
	Cockburn Central	Count	2	18	147	18	12	197
		%	1.0%	9.1%	74.6%	9.1%	6.1%	100.0%
	Wellard	Count	1	5	50	1	4	61
		%	1.6%	8.2%	82.0%	1.6%	6.6%	100.0%
Total		Count	23	69	273	40	23	428
		%	5.4%	16.1%	63.8%	9.3%	5.4%	100.0%

10.3.19 It is a good investment area for future capital return on land (Table 28)

Not applicable responses were the highest response across all precincts (43%). 32% of all respondents *agreed* with the statement with Cockburn Central (35%) and Bullcreek (33%) being slightly higher than Wellard (21%). This is supported by the high responses relating to *leasing / renting* and high *not applicable* responses related to *price of land* by Wellard precinct respondents.

Table (28)

		Good investment area future capital return						
		Good investment area future capital return						
		Dis agree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	6	27	55	73	9	170
		%	3.5%	15.9%	32.4%	42.9%	5.3%	100.0%
	Cockburn Central	Count	8	25	69	84	11	197
		%	4.1%	12.7%	35.0%	42.6%	5.6%	100.0%
	Wellard	Count	8	9	13	26	5	61
		%	13.1%	14.8%	21.3%	42.6%	8.2%	100.0%
Total		Count	22	61	137	183	25	428
		%	5.1%	14.3%	32.0%	42.8%	5.8%	100.0%

10.3.20 The council rates were favourable (Table 29)

Responses were generally neutral or not applicable. Wellard had the highest *agree* responses.

Table (29)

		Council rates were favourable						
		Council rates were favourable						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	27	60	26	48	9	170
		%	15.9%	35.3%	15.3%	28.2%	5.3%	100.0%
	Cockburn Central	Count	21	69	21	73	13	197
		%	10.7%	35.0%	10.7%	37.1%	6.6%	100.0%
	Wellard	Count	11	15	14	17	4	61
		%	18.0%	24.6%	23.0%	27.9%	6.6%	100.0%
Total		Count	59	144	61	138	26	428
		%	13.8%	33.6%	14.3%	32.2%	6.1%	100.0%

10.3.21 The visual appeal of the area was good (Table 30)

Bullcreek (49%) and Cockburn Central (45%) responses were significantly higher than Wellard (33%). Wellard also scored 30% in the neutral response category. The area of Kwinana has long been depressed and the condition of the Kwinana Hub area is evidence of this; whilst comparable to many suburbs across the metropolitan area, when compared to the new Gateway premises in Cockburn Central and the well maintained complexes in the wealthier suburbs surrounding the Bullcreek station, the area does not have the same quality amenity.

Table (30)

		Good visual appeal of the area						
		Good visual appeal of the area						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	11	52	83	16	8	170
		%	6.5%	30.6%	48.8%	9.4%	4.7%	100.0%
	Cockburn Central	Count	28	39	88	31	11	197
		%	14.2%	19.8%	44.7%	15.7%	5.6%	100.0%
	Wellard	Count	11	18	20	9	3	61
		%	18.0%	29.5%	32.8%	14.8%	4.9%	100.0%
Total		Count	50	109	191	56	22	428
		%	11.7%	25.5%	44.6%	13.1%	5.1%	100.0%

10.3.22 The local community facilities were good (Table 31)

The established areas of Bullcreek (50%) and Wellard (54%) had the highest responses for agree whilst Cockburn Central had the lowest (37%). Across all precincts, *Shop / Retail* responses were the highest (43%). *Other Retail* was one of the lowest (6%). Other significant responses were *Office / Business* (16%) and *Service Industries* (18%). Generally, *Manufacturing / processing / fabrication* (11%), *Storage / distribution* (4%), *Health / welfare /*

community service (3%), Entertainment / recreation / culture (2%) and Utilities / communications (1%) agree responses were low.

Table (31)

		Good local community facilities					Total	
		Good local community facilities						
		Disagree	Neutral	Agree	Not Applicable	No response		
Precinct	Bullcreek	Count	5	45	85	27	8	170
		%	2.9%	26.5%	50.0%	15.9%	4.7%	100.0%
	Cockburn Central	Count	22	56	73	35	11	197
		%	11.2%	28.4%	37.1%	17.8%	5.6%	100.0%
	Wellard	Count	4	15	33	6	3	61
		%	6.6%	24.6%	54.1%	9.8%	4.9%	100.0%
Total		Count	31	116	191	68	22	428
		%	7.2%	27.1%	44.6%	15.9%	5.1%	100.0%

10.3.23 It is an easy walk to a bus station (table 32)

Wellard had significantly higher *agree* responses. The Kwinana Bus station is part of the Kwinana hub making it very accessible to those areas around Kwinana, particularly those residents that rely on bus transport. Cockburn Central (26%) also has a bus station at the Gateway Shopping Centre, but this is predominately a transfer point for people from the surrounding areas commuting to the CBD. Bullcreek (26%) does not have a significant bus station near by, but the area of Willetton is well serviced by the bus network. It could be assumed that the more car dependant precincts value less the orientation of their business location to the bus station.

Table (32)

		Easy walk to a bus station						
		Easy walk to a bus station						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	23	35	44	61	7	170
		%	13.5%	20.6%	25.9%	35.9%	4.1%	100.0%
	Cockburn Central	Count	39	38	52	55	13	197
		%	19.8%	19.3%	26.4%	27.9%	6.6%	100.0%
	Wellard	Count	8	6	39	5	3	61
		%	13.1%	9.8%	63.9%	8.2%	4.9%	100.0%
Total		Count	70	79	135	121	23	428
		%	16.4%	18.5%	31.5%	28.3%	5.4%	100.0%

10.3.24 It is easy to catch a bus to the future train station (Table 33)

The high *agree* responses from the Wellard precinct (56%) are related to the Kwinana Bus Station that is located at the Kwinana Hub Shopping Centre where most of the businesses in this precinct are located. Businesses in Cockburn Central had *agree* as the highest responses (31%) although *not applicable* (27%) was also well represented. Bullcreek had the highest *not applicable* (30%), *neutral* (26%), and *disagree* (18%) responses.

Table (33)

		Easy to catch a bus to the future train station						
		Easy to catch a bus to the future train station						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	31	44	36	51	8	170
		%	18.2%	25.9%	21.2%	30.0%	4.7%	100.0%
	Cockburn Central	Count	31	42	60	53	11	197
		%	15.7%	21.3%	30.5%	26.9%	5.6%	100.0%
	Wellard	Count	8	7	34	8	4	61
		%	13.1%	11.5%	55.7%	13.1%	6.6%	100.0%
Total		Count	70	93	130	112	23	428
		%	16.4%	21.7%	30.4%	26.2%	5.4%	100.0%

10.3.25 It is an easy walk to the future train station (Table 34)

Bullcreek had the lowest *agree* response (5%) for this question. Most of the businesses are located within the Willetton industrial area which is spatially dislocated from the Bullcreek station and are not within walking distance of the station. Cockburn Central had the highest *Agree* response (27%),

Table (34)

		Easy walk to the future train station						
		Easy walk to the future train station						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	59	37	8	53	13	170
		%	34.7%	21.8%	4.7%	31.2%	7.6%	100.0%
	Cockburn Central	Count	35	46	54	49	13	197
		%	17.8%	23.4%	27.4%	24.9%	6.6%	100.0%
	Wellard	Count	21	15	12	7	6	61
		%	34.4%	24.6%	19.7%	11.5%	9.8%	100.0%
Total		Count	115	98	74	109	32	428
		%	26.9%	22.9%	17.3%	25.5%	7.5%	100.0%

10.3.26 It provides ample parking opportunities (Table 35)

This statement drew the third highest agree response across all precincts. Wellard (74%) was the highest with Cockburn Central (48%) and Bullcreek (52%).

Table (35)

		Ample parking opportunities						
		Ample parking opportunities						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	22	35	88	20	5	170
		%	12.9%	20.6%	51.8%	11.8%	2.9%	100.0%
	Cockburn Central	Count	23	40	95	29	10	197
		%	11.7%	20.3%	48.2%	14.7%	5.1%	100.0%
	Wellard	Count	4	5	45	3	4	61
		%	6.6%	8.2%	73.8%	4.9%	6.6%	100.0%
Total		Count	49	80	228	52	19	428
		%	11.4%	18.7%	53.3%	12.1%	4.4%	100.0%

10.3.27 It is on a busy pedestrian route (Table 36)

Wellard again recorded the highest *agree* response (49%) whilst Bullcreek highest response was *disagree* (38%) and Cockburn Central (31%). High levels of *not applicable* from both Bullcreek (21%) and Cockburn Central (23%) may be due to the high levels of car dependence and high levels of industrial land uses in the precincts. While Bullcreek (52%) and Cockburn Central (48%) had lower responses than Wellard to the previous statement regarding *ample parking opportunities*, their response still is the third highest location decision factors.

Table (36)

		Location on busy pedestrian route						
		Location on busy pedestrian route						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	65	34	26	36	9	170
		%	38.2%	20.0%	15.3%	21.2%	5.3%	100.0%
	Cockburn Central	Count	61	40	39	45	12	197
		%	31.0%	20.3%	19.8%	22.8%	6.1%	100.0%
	Wellard	Count	10	11	30	5	5	61
		%	16.4%	18.0%	49.2%	8.2%	8.2%	100.0%
Total		Count	136	85	95	86	26	428
		%	31.8%	19.9%	22.2%	20.1%	6.1%	100.0%

10.3.28 The business needs to be on a busy road (Table 37)

53% of all business responses agreed with this statement making it the fourth highest location consideration. Results were relatively even in distribution although Wellard had highest *agree* response (39%). Bullcreek and Cockburn had the *highest disagree* and *not applicable* responses. This may be due to the industrial nature of the business in the precincts and not being reliant on passing traffic for business trade. This is supported by the lower parking requirements that businesses within these two precincts factor into their location decision.

Table (37)

		Need to be on a busy road						
		Need to be on a busy road						
		Disagree	Neutral	Agree	Not Applicable	No response	Total	
Precinct	Bullcreek	Count	44	27	58	34	7	170
		%	25.9%	15.9%	34.1%	20.0%	4.1%	100.0%
	Cockburn Central	Count	47	33	59	45	13	197
		%	23.9%	16.8%	29.9%	22.8%	6.6%	100.0%
	Wellard	Count	7	18	24	8	4	61
		%	11.5%	29.5%	39.3%	13.1%	6.6%	100.0%
Total		Count	98	78	141	87	24	428
		%	22.9%	18.2%	32.9%	20.3%	5.6%	100.0%

10.4 Business Attributes

10.4.1 No. parking bays (Table 38)

Few businesses (12) reported having no car parking space. The 12 that did they were generally a part of a retail centre that provided shared parking space or had informal parking of some description. Bullcreek precinct had the largest car parks offering 20 to 100 bays (8%) although they also have a higher rate (46%) of small (1 to 5 bay) car parks, compared to Cockburn Central (22%) and Wellard (25%). The average car park size across all precincts is 41 bays.

Table (38)

		No. parking bays				
		Precinct				
		Bullcreek	Cockburn Central	Wellard	Total	
No. parking bays	0	Count	0	11	1	12
		%	.0%	16.4%	12.5%	8.5%
1 - 5		Count	30	15	2	47
		%	45.5%	22.4%	25.0%	33.3%
5 - 10		Count	17	19	2	38
		%	25.8%	28.4%	25.0%	27.0%
10 - 20		Count	14	16	3	33
		%	21.2%	23.9%	37.5%	23.4%
20 - 50		Count	4	0	0	4
		%	6.1%	.0%	.0%	2.8%
50 - 100		Count	1	6	0	7
		%	1.5%	9.0%	.0%	5.0%
Total		Count	66	67	8	141
		%	100.0%	100.0%	100.0%	100.0%

10.4.2 Busy periods weekdays (Table 39)

Business busy periods were established to categorise the respondent's line graphs into seven key time frames.

- Morning 6am – 12pm
- Midday 10 am – 2 pm
- Afternoon 12am – 6pm
- Evening 6pm – 10pm

- Multiple peaks
- Constant

Weekday trading patterns were generally similar between the precincts. Exceptions include a smaller *afternoon peak* in Cockburn Central compared to Wellard and Bullcreek. Wellard experiences less *multiple peaks* than other precincts whilst Bullcreek experiences the least *constant* trading patterns. Trading pattern variations may be correlated to the composition in the businesses that comprise each of the precincts.

Table (39)

		Busy Periods - Weekdays				
		Precinct				
		Bullcreek	Cockburn Central	Wellard	Total	
Busy Periods - Weekdays	Morning peak	Count	7	7	2	16
		%	4.1%	3.6%	3.3%	3.7%
	Midday peak	Count	26	29	9	64
		%	15.3%	14.7%	14.8%	15.0%
	Afternoon peak	Count	52	36	18	106
		%	30.6%	18.3%	29.5%	24.8%
	Evening peak	Count	3	7	2	12
		%	1.8%	3.6%	3.3%	2.8%
	Multiple peaks	Count	33	35	7	75
		%	19.4%	17.8%	11.5%	17.5%
	Constant	Count	33	63	17	113
		%	19.4%	32.0%	27.9%	26.4%
	Not applicable	Count	2	3	0	5
		%	1.2%	1.5%	.0%	1.2%
	No response	Count	14	17	6	37
		%	8.2%	8.6%	9.8%	8.6%
Total		Count	170	197	61	428
		%	100.0%	100.0%	100.0%	100.0%

10.4.4 Busy periods Saturdays (Table 40)

Wellard had the most deviation from the other precincts for Saturday trading patterns. It reported a lower (8%) morning period compared with Bullcreek (11%) and Cockburn Central (31%). It also showed a higher midday and afternoon trading pattern. This is largely due to its retail dominance. Another variation is the *not applicable* category. Wellard (12%) was less than the more mixed use commercial precincts of Bullcreek (38%)

and Cockburn Central (23%) where light industrial and service industries are more prominent in the mix.

Table (40)

		Busy Periods - Saturday's				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
Busy Periods - Saturday's	Morning peak	Count	19	37	5	61
		%	11.2%	18.8%	8.2%	14.3%
	Midday peak	Count	33	28	19	80
		%	19.4%	14.2%	31.1%	18.7%
	Afternoon peak	Count	13	14	9	36
		%	7.6%	7.1%	14.8%	8.4%
	Evening peak	Count	4	8	2	14
		%	2.4%	4.1%	3.3%	3.3%
	Multiple peaks	Count	9	7	2	18
		%	5.3%	3.6%	3.3%	4.2%
	Constant	Count	14	39	11	64
		%	8.2%	19.8%	18.0%	15.0%
	Not applicable	Count	64	46	7	117
		%	37.6%	23.4%	11.5%	27.3%
	No response	Count	14	18	6	38
		%	8.2%	9.1%	9.8%	8.9%
	Total	Count	170	197	61	428
		%	100.0%	100.0%	100.0%	100.0%

10.4.5 Busy periods Sundays (Table 41)

Variation in Sunday trading is minimal. Wellard responses show a slightly higher (10%) *midday peak* compared with Cockburn Central (4%) and Bullcreek (4%). *Not applicable* responses were highest in Bullcreek (75%) whilst Cockburn Central (65%) and Wellard (64%) were slightly lower. The results share similar causes for the Saturday trading patterns with operations of the more *industrial, manufacturing and trade service sectors* having higher concentrations in Bullcreek and Cockburn Central, where as Wellard has primarily retail outlets.

Table (41)**Busy Periods - Sunday's**

		Precinct				
		Bullcreek	Cockburn Central	Wellard	Total	
Busy Periods - Sunday's	Morning peak	Count	2	2	2	6
		%	1.2%	1.0%	3.3%	1.4%
	Midday peak	Count	6	8	6	20
		%	3.5%	4.1%	9.8%	4.7%
	Afternoon peak	Count	5	12	1	18
		%	2.9%	6.1%	1.6%	4.2%
	Evening peak	Count	4	8	2	14
		%	2.4%	4.1%	3.3%	3.3%
	Multiple peaks	Count	3	4	2	9
		%	1.8%	2.0%	3.3%	2.1%
	Constant	Count	9	16	3	28
		%	5.3%	8.1%	4.9%	6.5%
	Not applicable	Count	127	128	39	294
		%	74.7%	65.0%	63.9%	68.7%
	No response	Count	14	19	6	39
		%	8.2%	9.6%	9.8%	9.1%
	Total	Count	170	197	61	428
		%	100.0%	100.0%	100.0%	100.0%

10.5 Customers

Note: All customer transport modes are an estimate by the individual business owner.

10.5.1 Pedestrian (Table 42)

Pedestrian transport accounts for very little of customer transport modes. 86% of all businesses surveyed estimated that less than 10% of their customers arrive by foot. 8% of businesses reported that 10 – 20% arrived by foot.

The further away from the city the precinct is, and relative to the declining demographic of the precinct, pedestrian traffic increased. Wellard shows a much higher level of pedestrian traffic with 9% of businesses estimating that 0% to 20% of all customers are pedestrians. Bullcreek responses (4%) and Cockburn Central responses (5%) correlate with the location choice decisions relating to car parking and distances to transport stations.

Table (42)

		% of customers - pedestrians				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
% of customers - pedestrianst	1 - 10	Count	145	159	39	343
		%	91.8%	86.9%	69.6%	86.4%
	10 - 20	Count	7	14	12	33
		%	4.4%	7.7%	21.4%	8.3%
	20 - 30	Count	6	3	2	11
		%	3.8%	1.6%	3.6%	2.8%
	30 - 40	Count	0	2	1	3
		%	.0%	1.1%	1.8%	.8%
	40 - 50	Count	0	3	1	4
		%	.0%	1.6%	1.8%	1.0%
	50 - 60	Count	0	1	1	2
		%	.0%	.5%	1.8%	.5%
	90 - 100	Count	0	1	0	1
		%	.0%	.5%	.0%	.3%
Total		Count	158	183	56	397
		%	100.0%	100.0%	100.0%	100.0%

10.5.2 Bicycle (Table 43)

Bicycle as a form of customer transport was the least reported mode of transport reported by businesses. 98% of businesses considered that less than 10% of their customers arrived by bicycle. This was similar across all precincts.

Table (43)

		% of customers - bicycle				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
% of customers - bicycle	1 - 10	Count	155	181	56	392
		%	97.5%	98.9%	100.0%	98.5%
	10 - 20	Count	3	2	0	5
		%	1.9%	1.1%	.0%	1.3%
	20 - 30	Count	1	0	0	1
		%	.6%	.0%	.0%	.3%
Total	Count	159	183	56	398	
	%	100.0%	100.0%	100.0%	100.0%	

10.5.3 Car (Table 44)

58% of all businesses across the three precincts reported that car based customers accounted for 90% - 100% of customer trips and 86% of the businesses reported car based customers were between 70% -100 % of all customer modes. Wellard reported less car based customer trips with 73% of businesses reporting that 70% - 100% of customer trips were made by car. For the same bracket, Bullcreek reported 90% and Cockburn Central 87%.

Table (44)

		Precinct				
			Cockburn Central	Wellard		
			Bullcreek			Total
% of customers - car	1 - 10	Count	4	7	0	11
		%	2.5%	3.8%	.0%	2.8%
	10 - 20	Count	1	0	2	3
		%	.6%	.0%	3.6%	.8%
	20 - 30	Count	0	2	1	3
		%	.0%	1.1%	1.8%	.8%
	30 - 40	Count	0	1	1	2
		%	.0%	.5%	1.8%	.5%
	40 - 50	Count	1	3	3	7
		%	.6%	1.6%	5.4%	1.8%
	50 - 60	Count	1	5	1	7
		%	.6%	2.7%	1.8%	1.8%
	60 - 70	Count	8	5	7	20
		%	5.0%	2.7%	12.5%	5.0%
	70 - 80	Count	16	22	13	51
		%	10.1%	12.0%	23.2%	12.8%
	80 - 90	Count	23	23	16	62
		%	14.5%	12.6%	28.6%	15.6%
	90 - 100	Count	105	115	12	232
		%	66.0%	62.8%	21.4%	58.3%
Total		Count	159	183	56	398
		%	100.0%	100.0%	100.0%	100.0%

10.5.4 Bus (Table 45)

95% of bus trips across all precincts were reported to account for up to 10% of customer trips. Wellard (82%) reported less than Bullcreek (97%) and Cockburn Central (98%). Kwinana has a bus station at the Kwinana Hub Shopping centre which would account for the slightly higher *bus* customers. Cockburn also has a bus station, although this is predominately a park and ride interchange for CBD based trips.

Table (45)

% of customers - bus						
		Precinct				
			Cockburn			
			Central	Wellard		Total
		Bullcreek				
% of customers - bus	1 - 10	Count	154	179	46	379
		%	96.9%	97.8%	82.1%	95.2%
	10 - 20	Count	5	3	6	14
		%	3.1%	1.6%	10.7%	3.5%
	20 - 30	Count	0	1	1	2
		%	.0%	.5%	1.8%	.5%
	40 - 50	Count	0	0	3	3
		%	.0%	.0%	5.4%	.8%
Total		Count	159	183	56	398
		%	100.0%	100.0%	100.0%	100.0%

10.5.5 Train (Table 46)

As expected, no businesses received customers by train due to the line still being under construction.

(Table 46)

%of customers - train						
		Precinct				
			Cockburn			
			Central	Wellard		Total
		Bullcreek				
% of customers - train	1 - 10	Count	159	183	56	398
		%	100.0%	99.5%	100.0%	99.7%
	10 - 20	Count	0	1	0	1
		%	.0%	.5%	.0%	.3%
Total		Count	159	184	56	399
		%	100.0%	100.0%	100.0%	100.0%

10.6 Customers Markets

10.6.1 General Public (Table 47)

The responses from the survey correlate directly with the land use associated with the precinct. Accordingly, Wellard (92%), dominated by retail, reports a significantly higher result than Bullcreek (77%) which has a greater mix of retail, manufacturing and services. Cockburn Central (60%) which also has a greater mix of commercial land uses and is not reliant on retail trade.

Table (47)

Customers come mainly from general public						
			Precinct			
			Bullcreek	Cockburn Central	Wellard	Total
Customers come mainly from general public	No	Count	37	78	5	120
		%	22.6%	39.8%	8.2%	28.5%
	Yes	Count	127	118	56	301
		%	77.4%	60.2%	91.8%	71.5%
Total		Count	164	196	61	421
		%	100.0%	100.0%	100.0%	100.0%

10.6.2 Other Businesses (Table 48)

In line with the response rate for *general public*, Bullcreek (40%) and Cockburn Central (43%) rely less on the general public and more on business to business transactions than Wellard (16%).

Table (48)

Customers come mainly from other businesses						
			Precinct			
			Bullcreek	Cockburn Central	Wellard	Total
Customers come mainly from other businesses	No	Count	98	111	51	260
		%	60.5%	56.6%	83.6%	62.1%
	Yes	Count	64	85	10	159
		%	39.5%	43.4%	16.4%	37.9%
Total		Count	162	196	61	419
		%	100.0%	100.0%	100.0%	100.0%

10.6.3 Commuters (Table 49)

Only 2% of businesses across the three precincts rely solely on passing trade.

Table (49)

Customers are mainly commuters						
		Precinct				
			Cockburn Central	Wellard	Total	
Customers are mainly commuters	No	Count	162	193	58	413
		%	98.8%	98.5%	95.1%	98.1%
	Yes	Count	2	3	3	8
		%	1.2%	1.5%	4.9%	1.9%
Total		Count	164	196	61	421
		%	100.0%	100.0%	100.0%	100.0%

10.6.4 Other Customers (Table 50)

Other customers, e.g. telephone and dispatch operations account for 4% of customers across all precincts. Wellard (7%) had a higher response rate than Bullcreek (4%) and Cockburn Central (3%)

Table (50)

Customers mainly from other						
		Precinct				
			Cockburn Central	Wellard	Total	
Customers mainly from other	No	Count	158	190	57	405
		%	96.3%	96.9%	93.4%	96.2%
	Yes	Count	6	6	4	16
		%	3.7%	3.1%	6.6%	3.8%
Total		Count	164	196	61	421
		%	100.0%	100.0%	100.0%	100.0%

10.7 Staff employment

10.7.1 Full-time staff (Table 51)

Staff employed in businesses were categorised into groups of five. Most businesses (77%) employed between 0 and 5 fulltime staff members. 90% of businesses employed between 0 and 10 fulltime employees. Cockburn Central employed the least (86%) in the categories up to 10 employees, but more in the categories up to 40 fulltime employees. Cockburn Central also had the only responses from large companies employing from 40 to 125 fulltime staff members.

Table (51)

		No. full-time staff				
		Precinct				
			Cockburn Central	Wellard		Total
		Bullcreek				
No. full-time staff	0 - 5	Count	134	139	52	325
		%	80.2%	70.6%	85.2%	76.5%
	5 - 10	Count	20	30	6	56
		%	12.0%	15.2%	9.8%	13.2%
	10 - 15	Count	2	7	2	11
		%	1.2%	3.6%	3.3%	2.6%
	15 - 20	Count	4	6	1	11
		%	2.4%	3.0%	1.6%	2.6%
	20 - 30	Count	6	5	0	11
		%	3.6%	2.5%	.0%	2.6%
	30 - 40	Count	1	5	0	6
		%	.6%	2.5%	.0%	1.4%
	40 - 50	Count	0	2	0	2
		%	.0%	1.0%	.0%	.5%
	50 - 75	Count	0	1	0	1
		%	.0%	.5%	.0%	.2%
	100 - 125	Count	0	2	0	2
		%	.0%	1.0%	.0%	.5%
Total		Count	167	197	61	425
		%	100.0%	100.0%	100.0%	100.0%

10.7.2 Part-time staff (Table 52)

Numbers of staff employed part-time is higher than staff employed full-time. 94% across all precincts with Bullcreek recording the highest numbers (99%) in the 0 to 10 part-time employee category, whilst Wellard for the same bracket was 97%. Cockburn Central generally had more part-time staff in the higher brackets.

Table (52)

		No. part-time staff				
		Precinct				
		Bullcreek	Cockburn Central	Wellard	Total	
No. part-time staff	0 - 5	Count	160	184	55	399
		%	96.4%	93.4%	90.2%	94.1%
	5 - 10	Count	5	5	4	14
		%	3.0%	2.5%	6.6%	3.3%
	10 - 15	Count	0	4	1	5
		%	.0%	2.0%	1.6%	1.2%
	15 - 20	Count	0	2	0	2
		%	.0%	1.0%	.0%	.5%
	20 - 30	Count	0	1	1	2
		%	.0%	.5%	1.6%	.5%
	30 - 40	Count	0	1	0	1
		%	.0%	.5%	.0%	.2%
	50 - 75	Count	1	0	0	1
		%	.6%	.0%	.0%	.2%
Total		Count	166	197	61	424
		%	100.0%	100.0%	100.0%	100.0%

10.7.3 Temporary contract staff (Table 53)

98% of businesses across the precinct reported to employ 0 to 5 temporary or contract staff which is the same for each precinct.

Table (53)

		No. temporary / contract staff				
		Precinct				
		Bullcreek	Cockburn Central	Wellard		Total
No. temporary / contract staff	0 - 5	Count	164	192	60	416
		%	98.2%	97.5%	98.4%	97.9%
	5 - 10	Count	2	2	0	4
		%	1.2%	1.0%	.0%	.9%
	10 - 15	Count	1	1	0	2
		%	.6%	.5%	.0%	.5%
	15 - 20	Count	0	1	0	1
		%	.0%	.5%	.0%	.2%
	20 - 30	Count	0	0	1	1
		%	.0%	.0%	1.6%	.2%
	30 - 40	Count	0	1	0	1
		%	.0%	.5%	.0%	.2%
Total		Count	167	197	61	425
		%	100.0%	100.0%	100.0%	100.0%

10.7.4 Casual staff (Table 54)

Cockburn Central recorded the lowest (88%) of 0 – 5 casual staff employed but as in other employment categories, recorded more in the larger brackets.

Table (54)

		No. casual staff				
		Precinct				
		Bullcreek	Cockburn Central	Wellard	Total	
No. casual staff	0 - 5	Count	154	173	57	384
		%	92.2%	87.8%	93.4%	90.4%
	5 - 10	Count	9	10	1	20
		%	5.4%	5.1%	1.6%	4.7%
	10 - 15	Count	2	4	0	6
		%	1.2%	2.0%	.0%	1.4%
	15 - 20	Count	1	4	2	7
		%	.6%	2.0%	3.3%	1.6%
	20 - 30	Count	1	4	1	6
		%	.6%	2.0%	1.6%	1.4%
	30 - 40	Count	0	1	0	1
		%	.0%	.5%	.0%	.2%
	50 - 75	Count	0	1	0	1
		%	.0%	.5%	.0%	.2%
Total		Count	167	197	61	425
		%	100.0%	100.0%	100.0%	100.0%

10.8 Transport

10.8.1 Staff live less than a 5 minute drive from work (Table 55)

53% of business responses indicate that 10% or less of their employees live within a 5 minute drive from their workplace. Generally, 10% of businesses surveyed had 40% to 50% of their staff live within a five minute drive. Bullcreek (11%) and Cockburn Central (12%) business responses reported 90% to 100% of their staff living within a 5 minute drive from work whilst Wellard (5%) was lowest.

Table (55)

%staff live less than a 5 minute drive from work

		Precinct				
			Cockburn	Wellard		
			Central			Total
		Bullcreek				
% staff live less than a 5 minute drive from work	%0 - %10	Count	91	100	31	222
		%	54.5%	52.1%	51.7%	53.0%
	%10 - %20	Count	22	16	5	43
		%	13.2%	8.3%	8.3%	10.3%
	%20 - %30	Count	8	4	6	18
		%	4.8%	2.1%	10.0%	4.3%
	%30 - %40	Count	2	8	1	11
		%	1.2%	4.2%	1.7%	2.6%
	%40 - %50	Count	16	20	5	41
		%	9.6%	10.4%	8.3%	9.8%
	%50 - %60	Count	1	0	1	2
		%	.6%	.0%	1.7%	.5%
	%60 - %70	Count	2	7	3	12
		%	1.2%	3.6%	5.0%	2.9%
	%70 - %80	Count	4	9	3	16
		%	2.4%	4.7%	5.0%	3.8%
	%80 - %90	Count	3	4	2	9
		%	1.8%	2.1%	3.3%	2.1%
	%90 - %100	Count	18	24	3	45
		%	10.8%	12.5%	5.0%	10.7%
Total	Count	167	192	60	419	
	%	100.0%	100.0%	100.0%	100.0%	

10.8.2 Staff live more than a five minute drive from work (Table 56)

Results from this question, whilst not exactly reflecting the trends of the previous question, do generally mirror the results.

Table (56)

		% staff live more than a 5 minute drive from work				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
% staff live more than a 5 minute drive from work	%0 - %10	Count	21	28	6	55
		%	12.6%	14.6%	10.0%	13.1%
	%10 - %20	Count	4	6	1	11
		%	2.4%	3.1%	1.7%	2.6%
	%20 - %30	Count	0	8	3	11
		%	.0%	4.2%	5.0%	2.6%
	%30 - %40	Count	2	3	3	8
		%	1.2%	1.6%	5.0%	1.9%
	%40 - %50	Count	18	18	4	40
		%	10.8%	9.4%	6.7%	9.5%
	%50 - %60	Count	1	9	1	11
		%	.6%	4.7%	1.7%	2.6%
	%60 - %70	Count	5	3	2	10
		%	3.0%	1.6%	3.3%	2.4%
	%70 - %80	Count	19	13	8	40
		%	11.4%	6.8%	13.3%	9.5%
	%80 - %90	Count	13	11	7	31
		%	7.8%	5.7%	11.7%	7.4%
	%90 - %100	Count	84	93	25	202
		%	50.3%	48.4%	41.7%	48.2%
Total	Count	167	192	60	419	
	%	100.0%	100.0%	100.0%	100.0%	

10.8.3 Staff live less than a five minute walk from work (Table 57)

94% of businesses across the three precincts indicated that less than 10% of their staff lived less than a five minute walk from their employment.

Table (57)

		% staff live less than a 5 minute walk from work				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
% staff live less than a 5 minute walk from work	%0 - %10	Count	156	174	56	386
		%	94.5%	93.0%	94.9%	93.9%
	%10 - %20	Count	2	3	1	6
		%	1.2%	1.6%	1.7%	1.5%
	%20 - %30	Count	1	2	1	4
		%	.6%	1.1%	1.7%	1.0%
	%30 - %40	Count	1	2	0	3
		%	.6%	1.1%	.0%	.7%
	%40 - %50	Count	0	1	1	2
		%	.0%	.5%	1.7%	.5%
	%70 - %80	Count	1	1	0	2
		%	.6%	.5%	.0%	.5%
	%80 - %90	Count	1	0	0	1
		%	.6%	.0%	.0%	.2%
	%90 - %100	Count	3	4	0	7
		%	1.8%	2.1%	.0%	1.7%
	Total	Count	165	187	59	411
		%	100.0%	100.0%	100.0%	100.0%

10.8.4 Staff live between 5 and 10 minute walk from work. (Table 58)

92% of businesses across the three precincts indicated that less than 10% of their staff between a 5 and 10 minute walk from their work. Wellard had a slightly lower rate (86%) of staff living between a 5 and 10 minute walk from work but had a slightly higher increase in the 10% to 20% and 20% to 30% brackets.

Table (58)

		Precinct				
			Bullcreek	Cockburn Central	Wellard	Total
% staff live between 5 and 10 minute walk from work	%0 - %10	Count	153	171	51	375
		%	93.3%	91.4%	86.4%	91.5%
	%10 - %20	Count	4	5	2	11
		%	2.4%	2.7%	3.4%	2.7%
	%20 - %30	Count	3	4	2	9
		%	1.8%	2.1%	3.4%	2.2%
	%30 - %40	Count	1	2	1	4
		%	.6%	1.1%	1.7%	1.0%
	%40 - %50	Count	1	1	1	3
		%	.6%	.5%	1.7%	.7%
	%50 - %60	Count	0	0	1	1
		%	.0%	.0%	1.7%	.2%
	%60 - %70	Count	1	1	0	2
		%	.6%	.5%	.0%	.5%
	%70 - %80	Count	1	0	0	1
		%	.6%	.0%	.0%	.2%
	%80 - %90	Count	0	1	0	1
		%	.0%	.5%	.0%	.2%
	%90 - %100	Count	0	2	1	3
		%	.0%	1.1%	1.7%	.7%
Total	Count	164	187	59	410	
	%	100.0%	100.0%	100.0%	100.0%	

10.8.5 Staff live between 10 and 15 minute walk from work (Table 59)

Generally the rates of staff (83%) living in the 0% to 10% decreased and again Wellard recorded the lowest rate (76%). Again Wellard had a higher rate in the 10% to 20% bracket.

Table (59)

		% staff live between 10 and 15 minute walk from work				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
% staff live between 10 and 15 minute walk from work	%0 - %10	Count	141	155	45	341
		%	86.0%	82.9%	76.3%	83.2%
	%10 - %20	Count	4	6	4	14
		%	2.4%	3.2%	6.8%	3.4%
	%20 - %30	Count	3	7	2	12
		%	1.8%	3.7%	3.4%	2.9%
	%30 - %40	Count	2	3	1	6
		%	1.2%	1.6%	1.7%	1.5%
	%40 - %50	Count	5	5	2	12
		%	3.0%	2.7%	3.4%	2.9%
	%50 - %60	Count	1	1	2	4
		%	.6%	.5%	3.4%	1.0%
	%60 - %70	Count	1	0	0	1
		%	.6%	.0%	.0%	.2%
	%70 - %80	Count	0	2	0	2
		%	.0%	1.1%	.0%	.5%
	%80 - %90	Count	0	0	1	1
		%	.0%	.0%	1.7%	.2%
	%90 - %100	Count	7	8	2	17
		%	4.3%	4.3%	3.4%	4.1%
Total		Count	164	187	59	410
		%	100.0%	100.0%	100.0%	100.0%

10.8.6 Staff live more than a 15 minute walk from work. (Table 60)

65% of the responses indicated that 90% to 100% of their staff lived more than a five minute drive from work. In accordance with the previous data on staff living distance, Wellard recorded a lower rate (58%) in the higher brackets (90% to 100%), and a higher dispersal throughout the smaller brackets (60% to 90%).

Table (60)

%staff live more than 15 minute walk from work_cat * Precinct Crosstabulation

		Precinct				
			Cockburn Central	Wellard	Total	
% staff live more than 15 minute walk from work_cat	%0 - %10	Count	14	17	4	35
			%	8.5%	9.1%	6.8%
%10 - %20		Count	2	4	3	9
		%	1.2%	2.1%	5.1%	2.2%
%20 - %30		Count	0	0	1	1
		%	.0%	.0%	1.7%	.2%
%30 - %40		Count	2	2	1	5
		%	1.2%	1.1%	1.7%	1.2%
%40 - %50		Count	9	11	2	22
		%	5.5%	5.9%	3.4%	5.4%
%50 - %60		Count	2	3	0	5
		%	1.2%	1.6%	.0%	1.2%
%60 - %70		Count	2	5	4	11
		%	1.2%	2.7%	6.8%	2.7%
%70 - %80		Count	12	13	6	31
		%	7.3%	7.0%	10.2%	7.5%
%80 - %90		Count	11	9	4	24
		%	6.7%	4.8%	6.8%	5.8%
%90 - %100		Count	111	123	34	268
		%	67.3%	65.8%	57.6%	65.2%
Total		Count	165	187	59	411
		%	100.0%	100.0%	100.0%	100.0%

10.8.7 Staff travel alone by car / motorcycle (Table 61)

66% of businesses across all precincts reported that 90% to 100% of workers travelled alone by car or motorcycle to work. The next highest bracket (12%) was 0% to 10% of staff travelling alone by car or motorcycle. The responses were generally the same across precincts.

Table (61)

		%staff - travel alone by car / motorcycle				
		Precinct				
		Bullcreek	Cockburn Central	Wellard	Total	
% staff - travel alone by car / motorcycle	%0 - %10	Count	19	23	8	50
		%	11.8%	12.2%	13.8%	12.3%
	%10 - %20	Count	0	0	1	1
		%	.0%	.0%	1.7%	.2%
	%20 - %30	Count	4	2	0	6
		%	2.5%	1.1%	.0%	1.5%
	%30 - %40	Count	1	4	0	5
		%	.6%	2.1%	.0%	1.2%
	%40 - %50	Count	7	4	2	13
		%	4.3%	2.1%	3.4%	3.2%
	%50 - %60	Count	1	7	0	8
		%	.6%	3.7%	.0%	2.0%
	%60 - %70	Count	2	5	3	10
		%	1.2%	2.6%	5.2%	2.5%
	%70 - %80	Count	12	9	2	23
		%	7.5%	4.8%	3.4%	5.6%
	%80 - %90	Count	9	12	2	23
		%	5.6%	6.3%	3.4%	5.6%
	%90 - %100	Count	106	123	40	269
		%	65.8%	65.1%	69.0%	65.9%
Total	Count	161	189	58	408	
	%	100.0%	100.0%	100.0%	100.0%	

10.8.8 Staff travel alone by car with others (Table 62)

80% of businesses reported that 0% to 10% of staff travelled with others by car. This is supported by data from the previous question relating to individual car travel. Variation between precincts is minimal.

Table (62)

		% staff - travel by car with others				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
% staff - travel by car with others	%0 - %10	Count	136	148	45	329
		%	84.0%	78.7%	78.9%	80.8%
	%10 - %20	Count	2	6	2	10
		%	1.2%	3.2%	3.5%	2.5%
	%20 - %30	Count	3	4	1	8
		%	1.9%	2.1%	1.8%	2.0%
	%30 - %40	Count	2	6	0	8
		%	1.2%	3.2%	.0%	2.0%
	%40 - %50	Count	4	5	2	11
		%	2.5%	2.7%	3.5%	2.7%
	%60 - %70	Count	1	2	0	3
		%	.6%	1.1%	.0%	.7%
	%70 - %80	Count	3	4	2	9
		%	1.9%	2.1%	3.5%	2.2%
	%80 - %90	Count	1	0	2	3
		%	.6%	.0%	3.5%	.7%
	%90 - %100	Count	10	13	3	26
		%	6.2%	6.9%	5.3%	6.4%
Total		Count	162	188	57	407
		%	100.0%	100.0%	100.0%	100.0%

10.8.9 Staff travel by bus (Table 63)

96% of businesses reported that 0% to 10% of staff travelled by bus. Bullcreek (98%) and Cockburn Central (97%) had a slightly higher response in this bracket whilst Wellard (90%) had higher proportional numbers in the 30% to 40% and 30% to 40% brackets.

Table (63)

		% staff - travel by bus				
		Precinct				
		Bullcreek	Cockburn Central	Wellard	Total	
% staff - travel by bus	%0 - %10	Count	158	182	51	391
		%	97.5%	96.8%	89.5%	96.1%
	%10 - %20	Count	1	4	1	6
		%	.6%	2.1%	1.8%	1.5%
	%20 - %30	Count	1	0	2	3
		%	.6%	.0%	3.5%	.7%
	%30 - %40	Count	0	1	2	3
		%	.0%	.5%	3.5%	.7%
	%40 - %50	Count	2	1	0	3
		%	1.2%	.5%	.0%	.7%
	%90 - %100	Count	0	0	1	1
		%	.0%	.0%	1.8%	.2%
Total		Count	162	188	57	407
		%	100.0%	100.0%	100.0%	100.0%

10.8.10 Staff travel by train (Table 64)

As expected, no staff travelled by train due to the line still being under construction.

Table (64)

		% staff - travel by train				
		Precinct				
		Bullcreek	Cockburn Central	Wellard	Total	
% staff - travel by train	%0 - %10	Count	162	188	57	407
		%	100.0%	100.0%	100.0%	100.0%
Total		Count	162	188	57	407
		%	100.0%	100.0%	100.0%	100.0%

10.8.11 Staff travel by bicycle (Table 65)

97% of businesses reported that between 0% and 10% of staff travelled to work by bicycle. All precincts were generally the same.

Table (65)

		%staff - travel by bicycle				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
% staff - travel by bicycle	%0 - %10	Count	154	184	57	395
		%	95.1%	97.9%	100.0%	97.1%
	%10 - %20	Count	2	1	0	3
		%	1.2%	.5%	.0%	.7%
	%20 - %30	Count	1	1	0	2
		%	.6%	.5%	.0%	.5%
	%30 - %40	Count	2	0	0	2
		%	1.2%	.0%	.0%	.5%
	%40 - %50	Count	1	1	0	2
		%	.6%	.5%	.0%	.5%
	%50 - %60	Count	0	1	0	1
		%	.0%	.5%	.0%	.2%
	%60 - %70	Count	1	0	0	1
		%	.6%	.0%	.0%	.2%
	%90 - %100	Count	1	0	0	1
		%	.6%	.0%	.0%	.2%
Total		Count	162	188	57	407
		%	100.0%	100.0%	100.0%	100.0%

10.8.12 Staff travel by walking (Table 66)

96% of businesses reported that between 0% and 10% of staff travelled to work by bicycle. All precincts were generally the same.

Table (66)

		% staff - travel by walking				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
% staff - travel by walking	%0 - %10	Count	156	181	55	392
		%	96.3%	96.3%	96.5%	96.3%
	%10 - %20	Count	3	1	1	5
		%	1.9%	.5%	1.8%	1.2%
	%20 - %30	Count	1	1	1	3
		%	.6%	.5%	1.8%	.7%
	%30 - %40	Count	0	2	0	2
		%	.0%	1.1%	.0%	.5%
	%40 - %50	Count	1	2	0	3
		%	.6%	1.1%	.0%	.7%
	%70 - %80	Count	1	0	0	1
		%	.6%	.0%	.0%	.2%
	%90 - %100	Count	0	1	0	1
		%	.0%	.5%	.0%	.2%
Total		Count	162	188	57	407
		%	100.0%	100.0%	100.0%	100.0%

10.8.13 Staff travel by other methods (Table 67)

99% of businesses reported that between 0% and 10% of staff travelled to work by other methods. All precincts were generally the same.

Table (67)

		% staff - travel by other methods				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
% staff - travel by other methods	%0 - %10	Count	160	187	57	404
		%	98.8%	99.5%	100.0%	99.3%
	%10 - %20	Count	0	1	0	1
		%	.0%	.5%	.0%	.2%
	%90 - %100	Count	2	0	0	2
		%	1.2%	.0%	.0%	.5%
Total		Count	162	188	57	407
		%	100.0%	100.0%	100.0%	100.0%

10.9 Transport initiatives

10.9.1 Car pooling initiatives (Table 68)

94% of businesses do not have a car pooling program. Wellard (8%) reported to have a car pooling program which was slightly higher than Cockburn Central (6%) and Bullcreek (5%).

Table (68)

		Transport initiatives - Car pooling				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
Transport initiatives - Car pooling	No	Count	161	185	56	402
		%	94.7%	93.9%	91.8%	93.9%
	Yes	Count	9	12	5	26
		%	5.3%	6.1%	8.2%	6.1%
Total		Count	170	197	61	428
		%	100.0%	100.0%	100.0%	100.0%

10.9.2 Bus pass initiatives (Table 69)

99% of businesses do not have a bus pass program. All precincts are generally the same.

Table (69)

Transport initiatives - Bus pass						
		Precinct				
			Cockburn Central	Wellard	Total	
Transport initiatives - Bus pass	No	Count	169	193	60	422
		%	99.4%	98.0%	98.4%	98.6%
	Yes	Count	1	4	1	6
		%	.6%	2.0%	1.6%	1.4%
Total		Count	170	197	61	428
		%	100.0%	100.0%	100.0%	100.0%

10.9.3 Rail pass initiatives (Table 70)

99% of businesses do not have a rail pass program. All precincts are generally the same.

Table (70)

Transport initiatives - Rail pass						
		Precinct				
			Cockburn Central	Wellard	Total	
Transport initiatives - Rail pass	No	Count	168	195	61	424
		%	98.8%	99.0%	100.0%	99.1%
	Yes	Count	2	2	0	4
		%	1.2%	1.0%	.0%	.9%
Total		Count	170	197	61	428
		%	100.0%	100.0%	100.0%	100.0%

10.9.4 Cycling initiatives (Table 71)

99% of businesses do not have a cycling program. All precincts are generally the same.

Table (71)

		Transport initiatives - Cycle				
		Precinct				
			Bullcreek	Cockburn Central	Wellard	Total
Transport initiatives - Cycle	No	Count	169	195	60	424
		%	99.4%	99.0%	98.4%	99.1%
	Yes	Count	1	2	1	4
		%	.6%	1.0%	1.6%	.9%
Total	Count	170	197	61	428	
	%	100.0%	100.0%	100.0%	100.0%	

10.9.5 Walking initiatives (Table 72)

97% of businesses do not have a walking program. Bullcreek had six businesses with walking. These businesses had no notable relationship and varied in industrial sector from the *Service industry, Shop / retail and Other retail*.

Table (72)

		Transport initiatives - Walk				
		Precinct				
			Bullcreek	Cockburn Central	Wellard	Total
Transport initiatives - Walk	No	Count	164	194	59	417
		%	96.5%	98.5%	96.7%	97.4%
	Yes	Count	6	3	2	11
		%	3.5%	1.5%	3.3%	2.6%
Total	Count	170	197	61	428	
	%	100.0%	100.0%	100.0%	100.0%	

10.10 Business owned motor vehicles

10.10.1 Business owned trucks (Table 73)

Wellard businesses had no trucks which is a reflection on the retail sector and its advanced transport networks. Bullcreek business responses show 85% of businesses do not have trucks while 14% of them have 1 to 5 trucks and only 1.2% have more than 10 trucks. Cockburn Central had fewer businesses (79%) without trucks and more businesses (16%) in the 1 to 5 truck bracket and (3%) in the 5 to 10 truck bracket.

Table (73)

		No. business owned trucks				Total
		Precinct				
		Bullcreek	Cockburn Central	Wellard		
No. business owned trucks	0	Count	141	154	59	354
		%	84.9%	79.4%	100.0%	84.5%
1 - 5	Count	23	31	0	54	
	%	13.9%	16.0%	.0%	12.9%	
5 - 10	Count	0	6	0	6	
	%	.0%	3.1%	.0%	1.4%	
10 - 20	Count	2	3	0	5	
	%	1.2%	1.5%	.0%	1.2%	
Total	Count	166	194	59	419	
	%	100.0%	100.0%	100.0%	100.0%	

10.10.2 Business owned small commercials (Table 74)

Again Wellard had the highest level (90%) of businesses without vehicle ownership and Cockburn Central had the lowest level (59%) of businesses that did not own a small commercial vehicle. Bullcreek had similar levels of businesses without small commercials to Cockburn Central (62%). Businesses that did own 1 to 5 small commercial vehicles were the lowest in Wellard (10%) compared to Bullcreek (36%) and Cockburn Central (37%). This trend is a reflection of the mixed use commercial centres of Bullcreek and Cockburn Central precincts.

Table (74)

		No. business owned small commercials				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
No. business owned small commercials	0	Count	103	114	53	270
		%	62.0%	59.1%	89.8%	64.6%
	1 - 5	Count	59	71	6	136
		%	35.5%	36.8%	10.2%	32.5%
	5 - 10	Count	4	6	0	10
		%	2.4%	3.1%	.0%	2.4%
	10 - 20	Count	0	1	0	1
		%	.0%	.5%	.0%	.2%
	30 - 40	Count	0	1	0	1
		%	.0%	.5%	.0%	.2%
Total		Count	166	193	59	418
		%	100.0%	100.0%	100.0%	100.0%

10.10.3 Business owned cars (Table 75)

As for other business owned vehicles, Wellard had the most (71%) of businesses without a vehicle compared to Bullcreek (61%) and Cockburn Central (60%). For businesses with 1 to 5 cars, Bullcreek and Cockburn Central both have 37% of businesses with business owned motor vehicles, whilst Wellard has 29%. Both Bullcreek (2%) and Cockburn Central (3%) have businesses with 5 to 10 vehicles.

Table (75)

		No. business owned cars				Total
		Precinct				
		Bullcreek	Cockburn Central	Wellard		
No. business owned cars	0	Count	100	116	42	258
		%	60.6%	60.4%	71.2%	62.0%
1 - 5		Count	61	71	17	149
		%	37.0%	37.0%	28.8%	35.8%
5 - 10		Count	3	5	0	8
		%	1.8%	2.6%	.0%	1.9%
10 - 20		Count	1	0	0	1
		%	.6%	.0%	.0%	.2%
Total		Count	165	192	59	416
		%	100.0%	100.0%	100.0%	100.0%

10.10.4 Salary sacrificed vehicles (Table 76)

Cockburn Central has the least businesses (93%) without salary sacrificed vehicles, although the variation is low between Bullcreek (95%) and Wellard (97%). Again Cockburn Central has the most (7%) of businesses with salary vehicles in the 1 to 5 vehicle bracket whilst for the same bracket Bullcreek has 4% and Wellard has 3%.

Table (76)

		No. salary sacrificed / leased vehicles			
		Precinct			Total
		Bullcreek	Cockburn Central	Wellard	
No. salary sacrificed 0 / leased vehicles	Count	158	179	57	394
	%	95.2%	92.7%	96.6%	94.3%
1 - 5	Count	7	13	2	22
	%	4.2%	6.7%	3.4%	5.3%
5 - 10	Count	1	1	0	2
	%	.6%	.5%	.0%	.5%
Total	Count	166	193	59	418
	%	100.0%	100.0%	100.0%	100.0%

10.10.5 Staff who have daily use of business vehicles (Table 77)

Wellard has a lower rate of business vehicle ownership which is reflected in the high (95%) of staff that has no access to a company vehicle. Both Bullcreek and Wellard have 74% of their businesses with staff who have no access to a business owned vehicle. Cockburn Central has higher level (14%) of businesses that have 1 to 20 staff that have daily access to a business vehicle whilst Bullcreek has (9%). Bullcreek has a higher (10%) number of businesses with 30 – 50 staff members that have that have daily access to a company vehicle, whilst Cockburn Central has (4%).

Table (77)

		%staff - daily use of company vehicle				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
% staff - daily use of company vehicle	0	Count	114	136	54	304
		%	74.0%	74.3%	94.7%	77.2%
	1 - 10	Count	5	16	1	22
		%	3.2%	8.7%	1.8%	5.6%
	10 - 20	Count	9	9	0	18
		%	5.8%	4.9%	.0%	4.6%
	20 - 30	Count	2	3	0	5
		%	1.3%	1.6%	.0%	1.3%
	30 - 40	Count	8	4	0	12
		%	5.2%	2.2%	.0%	3.0%
	40 - 50	Count	7	3	0	10
		%	4.5%	1.6%	.0%	2.5%
	60 - 70	Count	3	4	0	7
		%	1.9%	2.2%	.0%	1.8%
	70 - 80	Count	0	1	0	1
		%	.0%	.5%	.0%	.3%
	90 - 100	Count	6	7	2	15
		%	3.9%	3.8%	3.5%	3.8%
	Total	Count	154	183	57	394
		%	100.0%	100.0%	100.0%	100.0%

10.10. 6 Staff who have permanent use of business vehicles (Table 78)

Bullcreek generally has more staff with permanent access to a company owned vehicle than Cockburn Central or Wellard. Bullcreek has the highest proportional number (8%) of businesses that have 90% to 100% of their staff with permanent use of a company owned vehicle. Cockburn Central (4%) and Wellard (5%) are lower. Cockburn Central responses indicate that 18% of businesses have 1% – 10% staff that has permanent access to a company owned vehicle. Bullcreek records the lowest (4%) whilst Wellard (14%) is in the middle. Wellard has the most businesses (72%) that have no staff with permanent access to a company owned vehicle.

Table (78)

		% staff - permanent use of company vehicles				
		Precinct			Total	
		Bullcreek	Cockburn Central	Wellard		
% staff - permanent use of company vehicles	0	Count	74	96	41	211
		%	48.1%	52.5%	71.9%	53.6%
	1 - 10	Count	7	32	8	47
		%	4.5%	17.5%	14.0%	11.9%
	10 - 20	Count	16	11	1	28
		%	10.4%	6.0%	1.8%	7.1%
	20 - 30	Count	7	10	1	18
		%	4.5%	5.5%	1.8%	4.6%
	30 - 40	Count	15	5	2	22
		%	9.7%	2.7%	3.5%	5.6%
	40 - 50	Count	8	15	1	24
		%	5.2%	8.2%	1.8%	6.1%
	50 - 60	Count	2	0	0	2
		%	1.3%	.0%	.0%	.5%
	60 - 70	Count	5	3	0	8
		%	3.2%	1.6%	.0%	2.0%
	70 - 80	Count	6	3	0	9
		%	3.9%	1.6%	.0%	2.3%
	80 - 90	Count	1	1	0	2
		%	.6%	.5%	.0%	.5%
90 - 100	Count	13	7	3	23	
	%	8.4%	3.8%	5.3%	5.8%	
Total	Count	154	183	57	394	
	%	100.0%	100.0%	100.0%	100.0%	

10.11 The Future

10.11.1 Intention to move in the next 18 months (Table 79)

Cockburn Central businesses had the highest (15%) yes response in relation to moving in the next 18 months compared with Bullcreek (7%) and Wellard (11%). No responses were the highest (89%) in Bullcreek whilst Cockburn Central was the lowest (78%). Wellard had the most (9%) businesses that were *unsure* compared to Cockburn Central (8%) and Bullcreek (4%).

Table (79)

		Intention to move in next 18 months				
		Precinct				
			Bullcreek	Cockburn Central	Wellard	Total
Intention to move in next 18 months	No	Count	143	145	45	333
		%	89.4%	77.5%	80.4%	82.6%
	Yes	Count	11	28	6	45
		%	6.9%	15.0%	10.7%	11.2%
	Possibly	Count	6	14	5	25
		%	3.8%	7.5%	8.9%	6.2%
Total	Count	160	187	56	403	
	%	100.0%	100.0%	100.0%	100.0%	

10.11.2 Will business benefit from the new railway (Table 80)

Bullcreek had the highest rate (60%) of businesses who considered that the railway *will not affect their business* operations at all. Cockburn Central was lower (37%) whilst Wellard businesses (14%) were more optimistic in their response. This is also reflected in Wellard's other responses (36%) that factored in *population growth* as the benefit. Again Bullcreek was the lowest (5%) and Cockburn Central in between (15%). Wellard responses also had the highest (18%) response rate for benefits from *increases in traffic*. Bullcreek (1%) was the lowest whilst Cockburn Central (15%) was again in the middle.

Cockburn Central had the most businesses (2%) that thought the railway would have *great impact* on their business. Also responses relating to *staff travelling to work* were highest (8%) in Cockburn Central. Wellard businesses responses suggested that 0% of staff would utilize

the train for work whilst 3% of Bullcreek businesses considered staff would utilise the train for work.

Wellard had the highest level (8%) whilst Bullcreek (4%) and Cockburn Central (5%) for *increasing customer access* to their business.

Wellard had the most (16%) followed by Bullcreek (14%) and Cockburn Central (7%) of business that *did not know* what impacts the railway would have on their business.

Table (80)

Will business benefit from the new railway * Precinct Crosstabulation

			Precinct			Total
			Bullcreek	Cockburn Central	Wellard	
Will business benefit from the new railway	It will not / Nil effect	Count	91	60	7	158
		%	60.3%	36.8%	14.0%	43.4%
	Minimal impact	Count	9	8	1	18
		%	6.0%	4.9%	2.0%	4.9%
	Great impact	Count	1	3	0	4
		%	.7%	1.8%	.0%	1.1%
	Maybe due to increase in population	Count	7	25	18	50
		%	4.6%	15.3%	36.0%	13.7%
	Too far away to benefit	Count	3	2	2	7
		%	2.0%	1.2%	4.0%	1.9%
	Increase in traffic	Count	1	24	9	34
		%	.7%	14.7%	18.0%	9.3%
	Increase in property / business value	Count	0	3	0	3
		%	.0%	1.8%	.0%	.8%
	Staff travel to work	Count	4	13	0	17
		%	2.6%	8.0%	.0%	4.7%
	Easier access for / to customers	Count	9	8	4	21
		%	6.0%	4.9%	8.0%	5.8%
	Negative impact resulting from growth of area	Count	1	2	0	3
		%	.7%	1.2%	.0%	.8%
	Not Applicable	Count	4	3	1	8
		%	2.6%	1.8%	2.0%	2.2%
	Unknown	Count	21	12	8	41
		%	13.9%	7.4%	16.0%	11.3%
Total		Count	151	163	50	364
		%	100.0%	100.0%	100.0%	100.0%

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