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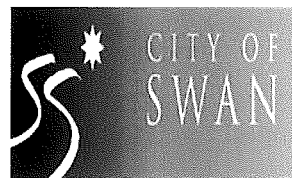
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Malaga Business Review 2004



Let's make it happen



Small & Medium Enterprise Research Centre
Edith Cowan University

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Dr Beth Walker

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The many Malaga business operators who took time to respond to the questionnaire.

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EXECUTIVE SUMMARY

This report is the result of a Swan Grant to review the current status of business and business activity in the Malaga Business District and to map any changes that have occurred since the original Malaga Business Audit was conducted in 2001. This project was undertaken in two parts. The first part was a replication of the 2001 Malaga business survey so that the City could review trends and analyse if any of the implemented recommendations based on the 2001 results had any discernable effect. The results of the current survey were also used to inform the second part of the project, which was to develop some targeted business growth workshops that were specific to the needs of Malaga businesses. The aim of the workshops was to support and assist local businesses to develop growth strategies, local networks and connect together using external support agencies and resources. Only the results of the 2004 survey are reported here.

This survey was distributed to 1200 businesses¹ and there were 419 responses, giving an overall response rate of 35%, which is slightly less in percentage terms to the 2001 survey, but gives sufficient data in order to be reasonably representative. Key topics covered in the survey were:

- basic business information,
- business expectations,
- use of business support services,
- why businesses choose to locate to Malaga and
- the respondents perception of the area and the council.

The results of the 2004 survey demonstrated that Malaga has continued to be a high growth business area, with little leakage and many new businesses entering the area. In addition businesses were moving around in Malaga, that is, businesses that outgrew their premises sought bigger premises elsewhere in Malaga rather than moving away from the area. This maintains links to the immediate area and adds to the overall stability of the area.

¹ There are over 1600 businesses currently operating in Malaga but the database used for this survey only contained 1200 entries.

A key issue from 2001 was the issue of whether Malaga should remain a primarily industrial area or whether the business mix should change. The 2004 results again show that most businesses want a broader business mix for Malaga, especially businesses that have been located in Malaga for a shorter period of time. At the time of writing the City of Swan was engaging in community consultation via Place Planning on this issue so no comment will be made in this report on the issue of business usage.

Over the 3 year period the types of businesses located in Malaga had not changed to any great extent, with light manufacturing and wholesaling making up over 50% of all respondents. Most were small businesses, that is employing 20 or less staff and most were still independently owned and operated. The amount of business to business activity within Malaga had not changed over the 3 year period with still less than 10% of businesses having the majority of customers or suppliers in Malaga. There was also no real change with the number of businesses exporting, which is currently 13% compared to 15% in 2001. As the percentage difference is relatively small it would be unwise to make inferences as to whether the number of businesses exporting has actually decreased as not every Malaga business replied to the survey.

In relation to electronic commerce most businesses now had email (86% compared to 75%) which is slightly higher than the national average of 81% (ABS, 2004). There was also a substantial increase in online business transactions, with 61% of respondents stating that they conducted business on-line, compared with 2001 figures of 17% and 16% respectively, that stated that they ordered goods on-line or sold goods on-line. This indicates that businesses are willing to participate in e-commerce more readily now than 3 years ago. This is also borne out by one of the issues that were raised in relation to what services or improvements Malaga needs, with lack of broadband access being a critical issue for many businesses. Another issue was poor public transport and security and a lack of restaurants and cafes.

Business expectations were still very positive, with over half of all business expecting to expand their businesses over the next 12 months, predominantly by increasing staffing levels, investing in new equipment and developing new products, service or markets. Businesses were also continuing to locate to Malaga with the most common reasons being the price of land, that Malaga was perceived as a growing area and previous locations being overcrowded and under serviced.

New questions asked included the number of apprentices that were employed by businesses in Malaga, with 27% of businesses reporting that they had 1 apprentice or more. Another new section was what type of business support services businesses required, which the majority of businesses stating that they did not need any external assistance. Of the ones that did require assistance, the most common need was for advice on writing grant applications, general management issues such as staffing and marketing. This is an area that will be explored further and will form the basis of the growth workshops.

As was the case in 2001, there was a willingness of stakeholders to participate in this study and to participate in some better business practices. This is reflected in the good response rate achieved from the postal questionnaire and the number of businesses that were interested in developing closer relationships with other businesses in the area and participate in activities and programs that the City intends conducting for Malaga businesses, including cleaner production.

The 2004 results are an overview of business perception by business owners of the Malaga area and show consistency of views and attitudes and an overall impression that Malaga is a good place to do business and that *ceteris parabus*, most businesses are reasonably happy in Malaga. This was also the case in 2001 which suggests that the general feeling of Malaga being a good business area has not diminished. Council action on the 2001 recommendations had resulted in the appointment of a dedicated City of Swan Malaga Development Officer. This appointment has created a strong local presence in the area and 33% of businesses were aware of the Malaga Officer, and had a positive view of Council involvement in the area. This position should be continued so that a positive Council – business relationship can be maintained.

KEY FINDINGS

In 2004 the majority (84%) of businesses located in Malaga are small businesses, which the Australian Bureau of Statistics (ABS, 2003) defines as being a business which employs 20 or less staff. In addition, there are several businesses which would be classified as either medium or large employers, based on the higher number of staff. As would be expected in a dedicated industrial area, most of the businesses are of a light manufacturing nature or engage in supplying services to other businesses.

Some key findings are as follows:

- The majority (74%) of Malaga Business Operators (MBO) thought that Malaga was a growing area and were satisfied with Malaga as a business location, with no thought of moving out of the area. This is a slight decrease from 2001 but still very positive.
- Businesses that had been located in Malaga for 3 years or less (but were not necessarily newly formed businesses as they had relocated to Malaga) used a variety of criteria for choosing Malaga as their business location with the most common responses being related to land price and proximity to home.
- There was no change in the percentage (less than 10%) of businesses that had the majority of their customers or suppliers based in Malaga, indicating that business to business trading has not increased over the past 3 years.
- Most Malaga businesses (86%) do not export, which is no change from 2001.
- The majority (86%) of businesses have a business email and 61% engage in some form of electronic commerce.
- Just over half of all businesses (57%) had expansion plans, which included employing more staff, purchasing new equipment and developing new products or markets. In percentage terms the number of businesses with expansion plans had decreased over the 3 year period by 11%.

- Over a quarter (27%) of businesses employed one or more apprentices.
- Three quarters of all respondents felt that Malaga should be opened up for more general business and not just be specifically reserved for industry, with businesses that had been in Malaga 3 years or less having a stronger opinion.
- Lack of public transport is still an area of concern, with 95% of respondents still saying that they and their staff used cars to get to work.
- Security was still a major issue with 20% of respondents stating this was an area of concern.
- Just under 10% of businesses expressed a desire for better eating facilities, indicating that as Malaga grows this will continue to be an issue.

ISSUES AND OPPORTUNITIES

Since the 2001 Malaga Business Audit the appointment of a Malaga Business Development Officer has resulted in a visible presence in the area and built positive relationships with local businesses, agencies and organisations. The 2004 survey highlighted both positive and negative issues that effect business operations in Malaga. On-going consultation with local businesses and land owners should be continued to ensure that solutions to any problems are driven from the businesses and that responsibility is shared for their implementation.

The single biggest issue for businesses was still security. With continued growth expected in the area, ongoing consultation is required to ensure creative and workable solutions to the problem. As these issues are not isolated to Malaga, positive measures used elsewhere may need to be explored for relevance and implemented in the Malaga area if appropriate. Liaison with law enforcement organisations, local community groups, associations and schools will be necessary to produce effective results in the area.

The difficulties associated with broadband access are ongoing and several strategies have been offered to businesses to increase the level of broadband in the Malaga area. Three factors are critical for resolution of this issue. First, there is a need to continue pressure on the relevant Government departments (including Telstra) to provide access. Second, business and land owners must be encouraged to participate in any lobbying efforts and thirdly, businesses need to be informed of progress as it occurs.

The lack of growth of business to business is an area that should be a strategic priority. A stronger localised business community would give additional vitality to the area and may attract other similar businesses to the area, thus developing formal or informal business clusters. Increases in information for and about Malaga Business Operators have been effective and in 2004 a city wide business directory was produced and included Malaga businesses. In addition, there has been continued development of the City's webpage. These developments will be a catalyst to deliver results recommended as a strategic priority of the 2001 report, that is, to promote business to business usage in the Malaga area.

Ongoing access to courses and information through government agencies such as Austrade, Department of Industry and Resources, the Department of Education and Training and the Small Business Development Corporation will continue to assist MBO's to develop and expand their businesses. Some respondents were interested in developing and expanding their businesses and these businesses should be encouraged to engage in workshops and seminars in situ.

As most Malaga businesses have now adapted to some form of computer technology the Malaga business website will continue to have a positive impact and enhance communication about existing business operators and development opportunities. A link for local businesses to change their email details would be useful.

Lack of public transport is still an issue and is unlikely to change in the foreseeable future. Cooperation between MBO's and other stakeholders (Land Owners, Transperth, CoS, WA Planning Commission) is needed to continue to pressure the State Government to increase public transport in the Malaga area. This will be particularly important as the area grows. The Malaga business website could be used as a noticeboard to keep business informed, active and consulted on this issue.

The Malaga area has some established industry champions and these business owners should be actively encouraged to assist the City in any promotion of the area which may help in developing industry clusters. They could also be approached to see if they would consider mentoring other local businesses to help their business development.

The area has a higher than State average employment of trainees and apprentices with 27% of businesses in the area employing at least one trainee or apprentice. This provides an opportunity to exploit this as a marketing tool and also to expand on local employment within the area. To achieve this, marketing should promote the young employee development in the area and Group Training Organisations should be contacted to explore further opportunities for the employment of trainees and apprentices in the area.

Environmental issues are becoming important for all industrial areas and the survey revealed that 67% of businesses indicated an interest in participating in an industry specific environmental program. This opportunity to continue to develop good environmental

practices in Malaga should be encouraged and contact made with organisations which can offer appropriate environmental training for small and medium sized businesses.

The physical appearance of the area is clearly an important factor when owners are considering the location for their business. The development of more 'green' areas and public open spaces were identified as necessary to improve the ambience of the local area. As this is an important issue in attracting new businesses to the area it is necessary to avoid the perception of overcrowding and untidiness in the area.

BACKGROUND

This report is the result of a Swan Grant to review the current status of business and business activity in the Malaga Business District and to map any changes that have occurred since the original Malaga Business Audit was conducted in 2001. The 2001 study was conducted to give the City of Swan baseline data on Malaga businesses as there had previously been little known about this important economic cohort.

This project was undertaken in two parts. The first part was a replication of the 2001 Malaga business survey so that the City could then review trends and analyse if any of the recommendations based on the 2001 results that were implemented had any discernable effect. The results of the current survey were also used to inform the second part of the project, which was to develop some targeted business growth workshops that were specific to the needs of Malaga businesses. The aim of the workshops was to support and assist local businesses to develop growth strategies, local networks and connect together using external support agencies and resources. Only the results of the survey are presented in this report.

Where questions have been replicated both sets of data are tabulated to allow comparisons to be made. In addition some questions asked in 2001 have been omitted and replaced with new questions that were in line with current inquiry needs of the council. In addition the recommendations that were made in 2001 are reviewed.

METHODOLOGY & RESULTS

A postal survey was conducted in July 2004 using a database supplied by the City containing 1200 business names. 419 questionnaires were received, which equates to a response rate of 35% compared with 41% from the 2001 survey. This is a good response rate given the notoriously low response rates of postal surveys to businesses.

RESULTS

A copy of the questionnaire is shown in Appendix 1 and the complete analysis of all questions is shown in Appendix 2. For expediency, abridged results are shown in the main body of this report and the business operators are referred to as Malaga business operators (MBOs).

Demographic information about the respondents

Three personal questions were again asked of the respondents, their gender, age and where they lived so as to gain some basic demographic information.

- In 2004 the majority (73%) of the respondents who completed the survey were male compared to 83% in 2001.
- In relation to the age of the respondent there were slight changes over the 3 years. In 2001 11% were under 30 years of age, 65% of all respondents were between 30 and 50 years of age, and of the remainder, 25% were over 50. In 2004, 9% were under 30, 58% were between 31-50 years of age and the remainder, 30% were over 50. This replicates the general ageing of the population and also highlights the baby boomer bulge that shows up in all population statistics. There are a significant proportion of older people in the workforce and many of them are business owners. Business ownership for older people is an employment option that could be a much more viable for some people than trying to find mainstream employment and is a trend that needs to be monitored.

- As in 2001 there is a wide distribution of where the business owners lived. Respondents still lived in most areas of the Perth metropolitan area but the majority were within a close proximity of Malaga, i.e. the Northern and Eastern suburbs. A detailed breakdown is shown in Appendix 2.

The business entity

There was little significant change over the 3 years in the business mix in Malaga and is still what would be expected to be found in a dedicated light industrial area in Australia. There was not a discernable increase in technology or 'high-tech types of businesses, which were highlighted in 2001 as an industry sector that could be targeted to locate to Malaga. On the whole Malaga seems to attract more generic light manufacturing and wholesale types of businesses. There are of course exceptions to this and Malaga does host some outstanding innovative and enterprising industries, including award winners. There are some industry champions in Malaga and rather than focus on specific industries to cluster in Malaga, a more broad based approach which highlights the diversity of current businesses might be a more appropriate economic development strategy. This could also be an alternate point of difference in that Malaga is a good area for all types of businesses rather than specific industries, thus broadening rather than narrowing its overall appeal.

- As was the case in 2001 the majority of businesses were of either a manufacturing base or of a service to business base. The main industry categories for 2004 are as follows:
 - 28% manufacturing
 - 22% wholesaling
 - 15% retailing (including motor trades such as panel beating)
 - 10% construction and construction trades (i.e. plumbing and carpentry)
 - 12% property and business services (i.e. real estate agents, accountants)

The remaining 13% were other industry categories and 5% of respondents declined to answer the question.

- There was a slight change of business ownership with the majority of businesses still being independently owned and operated (86% in 2001 and 80% in 2004) but an increase in being a subsidiary or branch company from 5% in 2001 to 12% in 2004. The head office of a company was unchanged at 4%.
- Most Malaga businesses are not new businesses as only 7% having been in operation for less than 2 years. Some businesses are well established, with 20% having being in operation for over 20 years. There is a steady increase in the business population with 22% having been in the area for 2 years or less and 58% of all businesses stating that they had previously been located elsewhere. This shows that businesses are relocating to Malaga from other business locations and the nature of most businesses is such that they do not move to Malaga from a home-base. The most common previous locations were the Osborne Park / Balcatta area or the Bayswater Bassendean Morley area and the most common reasons for moving were: wanting bigger premises, purchasing the land or property or that it was a better location.
- Only 3% stated that home was their previous location, which is the average proportion for home-based business as most are service orientated. However, there is an opportunity to encourage growth orientated home-based businesses to relocate their businesses into commercial premises if benefits can be demonstrated, such as access to a wider business community, access to better facilities and the opportunity to make their business more visible.
- In 2001 over half (56%) of the businesses were micro in size, which means that they employ up to 5 staff, with a further 28% having between 6 and 20 employees. Therefore 84% of Malaga businesses would be classified as small enterprises. The remainder had either more than 20 employees (6%), or declined to answer this question (10%). In 2004 there was little change with 54% of businesses employed 5 or less and a further 35% employed between 6 -20 staff, thus giving an overall percentage of small businesses being 89% and the remaining 10% being businesses employing over 20 staff, of which there are several major employers who have staff numbers of over 150.

- A new question was asked in 2004 regarding employing trainees or apprentices. Nearly one third (27%) of businesses stated that they had at least 1 trainee or apprentice, which is higher than the state average. This could be attributed to the type of businesses that are in Malaga, which are more conducive to having apprentices and is an employment option that could be expanded. Group training organisations could be contacted to explore the opportunity to increase the number and type of apprentices and trainees in the area.

Customers and suppliers

An initial interest in 2001 was whether Malaga was an active local trading area in terms of businesses buying and selling to other Malaga businesses. The 2001 results showed that it was not the case with less than 10% of the businesses having the majority of their customers or suppliers in Malaga. The same is true of the current 2004 results with only 10% stating that the majority of their suppliers were in Malaga and only 8% of customers. Developing a more vibrant B2B local environment was one of the 2001 recommendations and to date there appears to have been little development in this area. However the second part of this project may address this issue. Another issue was exporting and this again has not changed significantly over the 3 year period with only 14% of businesses stating that they export.

- The customer base for just over half of all businesses, if Malaga is included, is Metropolitan Perth (51%), followed by the rest of Western Australia 43%. The remaining 6% is made up of the Eastern States and overseas.
- The supplier base is even more localised with 61% of suppliers being in Metropolitan Perth, which again included Malaga. The remainder is overseas or the Eastern States.
- The majority of Malaga businesses (84%) do not export. Of the 14% who do, their export markets are varied with the main markets being Asia and New Zealand and to a lesser extent Europe. The percentage of products exported also varies but most are exporting less than 10% of their products.

Use of technology

The use of technology in business is becoming increasingly important and there have been some changes recorded over the 3 year period. The main change was the number of businesses that now have email and internet access as 86% now have email compared with 75% in 2001. Of the ones that did not have it most intended to be connected within the next 2 years, indicating that virtually all businesses in Malaga will have a business email. This has significant implication for communicating with these businesses so it is important that if databases are kept, they are regularly updated. This is currently the practice and should remain so. Businesses were also asked a question was regarding the preferred method of accessing business advice and information and 56% of respondents indicated that email was how they would like to receive information. The amount of e-commerce being conducted has also increased dramatically over the 3 year period with more than half of all businesses stating that they conduct business on line. The other area of interest in regard to electronic commerce was broadband access, which had been a continuing issue.

- Virtually all businesses (86%) had a business email address.
- In 2001 only 17% of businesses were ordering supplies on-line and a similar percentage (16%) were selling on-line, 43% conducted their banking on-line and slightly less (39%) paid accounts on-line. In 2004 61% of businesses stated they conducted some form of business on-line.
- In 2004 38% of businesses had broadband access and 51% stated that they thought broadband would improve their businesses. This makes the availability of broadband for all Malaga businesses a priority, especially given the number of businesses that are already conducting some form on on-line transactions.

Business expectations

Business expectations are indicative of economic activity generally. Over the past 3 years WA has experienced steady economic growth and a reasonable period of prosperity. There was a change of State Government at the beginning of 2001 but over the period that does not seem to have had a deleterious effect on business in general. Businesses in the 2001 survey were up-beat about their business expectations; however businesses in 2004 were less confident about business expansion. The questions in this section were exactly replicated over both surveys.

- In 2001 two-thirds of the sample (68%) had definite growth plans for their businesses, 21% had no growth plans and 11% were unsure. In 2004 just over half (57%) had definite growth plans, 17% stated that they had no growth plans and the remaining 26% were unsure.
- Of the businesses that did intend to expand virtually all were going to expand by employing more staff. Expansion plans also included investing in new equipment, developing new products services and local markets.
- A small percentage (15%) were also intending to move to larger premises in Malaga or to expand on their existing site (22%). Very few (3%) stated that their expansion plans meant moving out of Malaga, thus reinforcing the view that existing businesses are happy with the current status of business in the area. These percentages are similar to the 2001 results.

Business support services

Building on the previous section on business expansion were a series of new questions asking if Malaga businesses were aware of government business services and whether businesses needed any assistance in developing and growing their businesses. Most businesses (68%) did not require any assistance in expanding their businesses and 19% of businesses declined to comment. Of the businesses that expressed interest in gaining assistance it was mainly in

the area of assistance to write grant applications, followed by operational management issues, marketing and managing human resources.

- Respondents were also asked of their awareness of business services and advice by various different agencies and the ones they accessed. Not all businesses answered all of these questions but local services were used more widely than for example Federal government business assistance from agencies such as AusIndustry or AusTrade. Businesses were also asked if they belonged to any business and professional associations with 38% of respondents belonging to a business association but only 21% belonging to their professional association.
- In relation to federal government agencies that assist business, 20% of businesses stated they were aware of AusIndustry and 27% of AusTrade. It should be acknowledged that the type of business assistance that these agencies give is geared towards either larger businesses or businesses that are interested in exporting, however given the continuing growth in Malaga these agencies may want to increase their profile in the area.
- At state level, 25% of businesses said they were aware of the Department of Industry and Resources, which is interesting given that there were not many mining or resource companies in Malaga, and 46% said they were aware of the Small Business Development Corporation (SBDC). However only 29% of businesses were aware of the Malaga Business Enterprise Centre, which is SBDCs local arm. Clearly the BEC does not have a high profile in Malaga. A high percentage of businesses (40%) were also aware of the Chamber of Commerce and also 43% were aware of the Malaga & Districts Business Association, indicating that these 2 organisations have a high public profile in the area.
- At a local level 30% of businesses were aware of the City's business services or programs and 12% were aware of the specific cleaner production program. Of note also is that 67% of businesses stated that they would be interested in participating in an industry specific environmental program, which is a point that needs to be pursued.
- However, awareness does not necessarily translate into usage with the main business service and advice provider being the Chamber of Commerce & Industry (6%), MDBA

(6%) followed by SBDC/BEC (5%) AusTrade (3%) and AusIndustry (1%). It is clear that there is room for all agencies to translate awareness into usage, especially at a federal and state level as they are the government arms charged with assisting businesses, rather than the local business associations.

Employees

Having a local source of labour is important for business and Malaga has several residential areas within close proximity to draw labour from. In 2001 40% of employees lived within a 10 minute drive of Malaga and business owners stated that they employ staff because of their skills not because of where they lived. A 10 minute drive was thought to encompass the main residential areas of the CoS and other nearby residential areas.

- Nearly two thirds (63%) of employees did not live within a 10 minute drive of Malaga, which is slightly less than previously recorded.
- Virtually all employees (95%) drove to work and only 2% car pooled, which is similar to the 2001 results. Public transport is not easily accessible which would explain the high reliance on private transport. This could also be an inhibitor to further expansion of youth apprenticeships in the area.

Reasons for being in Malaga

Knowledge of why businesses choose to be located in Malaga was one of the key requirements of the survey in 2001 and was again asked in 2004 to see if there had been any discernable change. There were no significant changes over time as to why people chose to locate in Malaga, with the predominant reasons for being in Malaga in 2001 being because it was a growing area, that land or property was still available at reasonable prices and it was close to major roads. In 2004 these were still the most important reasons. The answers were ascertained by a series of 16 statements which used a 6 point scale and an option for the statement to be not applicable to the respondent. The anchors of the scale were 1, indicating that the respondent strongly disagreed with the statement and 6, indicating that the respondent strongly agreed with the statement. It should be noted that not all respondents answered all of the statements. There was a generic introduction to all of these statements, which was "*I chose Malaga as my business location because...*"

The current 2004 respondents were not necessarily the same people who responded to the 2001 survey, therefore secondary analysis was conducted on the 2004 series of statements with respondents further categorised as being located in Malaga for under 3 years and over 3 years. Using 3 years as the split point was due to the significant increase in the number of new businesses locating to Malaga over the past 3 years and to see if their motivations were different to businesses that had been in Malaga for a longer period of time.

In addition the table compares the 2004 complete scores with the scores of businesses that had been in Malaga for up to 3 years and businesses that had been in Malaga over 3 years and their level of agreement with all the statements. Of the 419 businesses that responded 121 (29%) had been located in Malaga for 3 years or less, 284 (68%) for over 3 years and the remaining 3% declined to answer the question.

I chose Malaga as my business location because it is close to my suppliers

2001 (total responses_by %)	
1 = Strongly disagree	20
2	14
3	16
4	12
5	4
6 = Strongly agree	6
Not applicable	26
Missing data	2
	100%

2004 (total responses by %)	
1 = Strongly disagree	16
2	10
3	17
4	14
5	8
6 = Strongly agree	5
Not applicable	26
Missing data	4
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	27%	30%	26%

There has been a slight increase in businesses being located in Malaga because of proximity to suppliers but it is still only 27% who agreed with this being a reason, demonstrating the relatively small amount of business to business being conducted solely within Malaga which is also borne out by the next statement regarding being close to customers. In relation to newer businesses and more established businesses there was only a small percentage difference indicating a slight move towards more localised business to business.

I chose Malaga as my business location because it is close to my customers

2001 (total responses by %)	
1 = Strongly disagree	14
2	12
3	17
4	14
5	8
6 = Strongly agree	12
Not applicable	21
Missing data	2
	100%

2004 (total responses by %)	
1 = Strongly disagree	13
2	8
3	18
4	18
5	9
6 = Strongly agree	9
Not applicable	21
Missing data	4
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	36%	41%	32%

There has also only been a slight increase in proximity to customers over the 3 year period comparing the total responses over time. However there is a difference here with newer businesses that had only been in Malaga a short time, with these businesses stating that being close to customers were a reasonably significant reason for locating to Malaga. This could coincide with the corresponding growth of residential areas boarding Malaga for businesses that deal directly with the general public and the general increase in businesses overall in area, for businesses that are predominantly wholesale or trade businesses.

I chose Malaga as my business location because it is close to my home

2001 (total responses by %)	
1 = Strongly disagree	13
2	9
3	11
4	14
5	10
6 = Strongly agree	27
Not applicable	14
Missing data	2
	100%

2004 (total responses by %)	
1 = Strongly disagree	10
2	10
3	14
4	17
5	15
6 = Strongly agree	22
Not applicable	9
Missing data	3
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	54%	53%	55%

There is no real change in the response so proximity to home is still a moderately strong reason for locating their business in Malaga. In addition the majority of business owners still live reasonably close to Malaga. There was also little difference in the whether the business was a new business or an established business.

I chose Malaga as my business location because it is close to major roads

2001 (total responses by %)	
1 = Strongly disagree	3
2	5
3	11
4	17
5	22
6 = Strongly agree	30
Not applicable	10
Missing data	2
	100%

2004 (total responses by %)	
1 = Strongly disagree	4
2	5
3	10
4	19
5	27
6 = Strongly agree	25
Not applicable	6
Missing data	4
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	71%	66%	72%

Being close to major roads was still a major motivation for locating in Malaga in both 2001 and 2004, with nearly three quarters of respondents scoring 4 or over in the current survey. In addition there is a small increase for newer businesses stating that this was a motivator. This highlights that even though there are some traffic problems in within Malaga, it has good arterial roads and is not difficult to get to. Signage was an issue in 2001 but was not raised in 2004 so either signage has improved or the area as a whole is becoming more established and there is less need for dedicated signage. It should be noted that there is generic Malaga signage at the main entry points to the area, which is not evident for areas such as Osborne Park or Balcatta, thus given Malaga a visual signage advantage over other rival industrial areas.

I chose Malaga as my business location because space/land was readily available

2001 (total responses by %)	
1 = Strongly disagree	2
2	3
3	5
4	14
5	26
6 = Strongly agree	37
Not applicable	11
Missing data	2
	100%

2004 (total responses by %)	
1 = Strongly disagree	4
2	4
3	6
4	16
5	27
6 = Strongly agree	30
Not applicable	10
Missing data	3
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	73%	77%	72%

The availability of space or land was also still a significant motivation for locating in Malaga in 2004, with just under three quarters of the respondents (73%) scoring 4 or over. It was also very important for newer businesses, which could be a reflection of the general contraction of supply of land in the Perth metropolitan area for business premises. Malaga still has reasonably large blocks of new land which is clearly an advantage. However the supply of new land will obviously decrease as the area fills up and some consideration should be given to how the remaining land should be used, that is, if large blocks should be set aside or whether dividing into smaller block sizes is more appropriate.

I chose Malaga as my business location because it is close to other industrial areas

2001 (total responses by %)	
1 = Strongly disagree	8
2	8
3	16
4	21
5	14
6 = Strongly agree	13
Not applicable	17
Missing data	3
	100%

2004 (total responses by %)	
1 = Strongly disagree	6
2	9
3	16
4	22
5	18
6 = Strongly agree	11
Not applicable	14
Missing data	4
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	51%	52%	49%

There was little change over time in this reason with just over half (51%) of respondents indicated a score of 4 or over, showing that proximity to other industrial areas was reasonably important. Initially most Malaga businesses did not participate in localised B2B. A slight increase in the newer businesses locating to Malaga for this reason was evident.

I chose Malaga as my business location because it is close to the airport

2001 (total responses by %)	
1 = Strongly disagree	19
2	13
3	13
4	11
5	6
6 = Strongly agree	7
Not applicable	29
Missing data	2
	100%

2004 (total responses by %)	
1 = Strongly disagree	16
2	14
3	17
4	11
5	11
6 = Strongly agree	6
Not applicable	22
Missing data	3
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	28%	31%	25%

Proximity to the airport was still not a major consideration for the majority of respondents, with only 28% scoring 4 or over, and just under one quarter of businesses stating that this reason was not applicable to them. As stated previously, given that few businesses export the closeness of the airport is not very relevant to most businesses. It was however slightly more important to newer businesses.

I chose Malaga as my business location because it is close to Perth's CBD

2001 (total responses by_%)	
1 = Strongly disagree	9
2	9
3	21
4	22
5	12
6 = Strongly agree	8
Not applicable	17
Missing data	2
	100%

2004 (total responses by %)	
1 = Strongly disagree	10
2	12
3	19
4	19
5	14
6 = Strongly agree	8
Not applicable	15
Missing data	3
	100

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	41%	41%	41%

Proximity to Perth's CBD was a moderate motivation and has not changed over the 3 year period and there was also no difference between newer businesses and more established businesses.

I chose Malaga as my business location because I liked the look of the area

2001 (total responses by %)	
1 = Strongly disagree	7
2	6
3	18
4	21
5	18
6 = Strongly agree	14
Not applicable	14
Missing data	2
	100%

2004 (total responses by %)	
1 = Strongly disagree	7
2	8
3	13
4	24
5	22
6 = Strongly agree	12
Not applicable	11
Missing data	3
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	58%	65%	54%

The look of the Malaga has become a more important motivator in 2004. In 2001 a lack of ambiance was an area for improvement and respondents also mentioned it in the current survey. The work on the physical appearance of the area that the City and the developers have made to Malaga has had some effect and this effort needs to be maintained so that Malaga remains a more visually attractive industrial area compared to other areas. In addition, as the area ages the physical look of the area will become more important.

There was also a difference between newer businesses and the established businesses on this point. Some of the reasons stated for moving from previous locations were that they had become crowded and untidy. Appearance is clearly an important factor when considering location and improvements made in this regard will reflect well on Malaga's future growth. In regard to the open ended question on what facilities Malaga lacked, some respondents mentioned 'green' areas or public open spaces, which might be something that needs to be considered.

I chose Malaga as my business location because I liked the lease/rental prices of the area

2001 (total responses by %)	
1 = Strongly disagree	6
2	5
3	9
4	15
5	21
6 = Strongly agree	17
Not applicable	25
Missing data	2
	100%

2004 (total responses by %)	
1 = Strongly disagree	7
2	5
3	10
4	17
5	21
6 = Strongly agree	14
Not applicable	22
Missing data	4
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	52%	57%	51%

There was very little change in the lease or rental prices as a motivator with 52% of respondents scoring 4 or over. This statement had just under one quarter of respondents stating that this was not an applicable reason, which assumes that these respondents were the owners of the premises. As with most other statements this was slightly more important for newer businesses.

I chose Malaga as my business location because I liked the price of land

2001 (total responses by %)	
1 = Strongly disagree	6
2	5
3	7
4	13
5	19
6 = Strongly agree	16
Not applicable	32
Missing data	2
	100%

2004 (total responses by %)	
1 = Strongly disagree	5
2	6
3	10
4	16
5	17
6 = Strongly agree	16
Not applicable	27
Missing data	3
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	49%	43%	51%

There was also little change in this response over the 3 year period, with just under half (49%) scoring 4 or over and it is assumed that these businesses have built their premises. There was also a high proportion of respondents (27%) stating that this was not an applicable reason for locating in Malaga so it is assumed that these businesses that were renting their premises. Interestingly this was one statement that newer businesses were less positive on.

I chose Malaga as my business location because I liked the price of nearby housing

2001 (total responses by %)	
1 = Strongly disagree	13
2	10
3	10
4	5
5	5
6 = Strongly agree	4
Not applicable	50
Missing data	3
	100%

2004 (total responses by %)	
1 = Strongly disagree	15
2	11
3	9
4	7
5	5
6 = Strongly agree	4
Not applicable	45
Missing data	4
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	16%	15%	18%

Even though many respondents had stated that Malaga was close to home, only 16% scored 4 or over on this motivator, which indicates that the price of nearby housing is not relevant to the business location decision. As with the 2001 results there were a large proportion of respondents who did not find this motivator applicable at all. Newer business owners were less positive about this statement indicating that they were not interested in purchasing a residence in very close proximity to their business.

I chose Malaga as my business location because I liked the reasonable council rates

2001 (total responses by %)	
1 = Strongly disagree	13
2	15
3	18
4	14
5	5
6 = Strongly agree	2
Not applicable	30
Missing data	3
	100%

2004 (total responses by %)	
1 = Strongly disagree	23
2	13
3	16
4	10
5	4
6 = Strongly agree	1
Not applicable	29
Missing data	4
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	15%	18%	13%

There was a slight change over time with 52% (as opposed to 46% in 2001) disagreeing with this statement. The large proportion (29%) of 'not applicable' respondents for this statement, are assumed to be renting their premises. There was a slightly higher positive response from the newer businesses but it was still not a significant reason overall.

I chose Malaga as my business location because Malaga is a growing area

2001 (total responses by %)	
1 = Strongly disagree	2
2	2
3	7
4	16
5	30
6 = Strongly agree	33
Not applicable	9
Missing data	1
	100%

2004 (total responses by %)	
1 = Strongly disagree	2
2	4
3	9
4	17
5	28
6 = Strongly agree	29
Not applicable	8
Missing data	3
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	74%	71%	75%

In 2001 and 2004 the highest ranked motivator was that Malaga is a growing area, although there has been a 5% drop over the period. This indicates a very high agreement with the statement that Malaga is a growth area. Interestingly newer businesses are less positive than more established businesses, although it is still the highest motivator for this cohort. This could indicate a decrease in the perception of Malaga as simply a growing area and that it is becoming an established industrial area, which has other more tangible benefits, such as good transport links.

I chose Malaga as my business location because Malaga is a good investment area

2001 (total responses by %)	
1 = Strongly disagree	3
2	3
3	10
4	16
5	21
6 = Strongly agree	20
Not applicable	25
Missing data	2
	100%

2004 (total responses by %)	
1 = Strongly disagree	4
2	5
3	9
4	20
5	19
6 = Strongly agree	20
Not applicable	19
Missing data	4
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	59%	56%	58%

Well over half (59%) of the respondents scored 4 or over for this statement, which indicates the perception that Malaga is still a good investment area. There was little difference between newer and established business on this statement.

I chose Malaga as my business location because I bought an existing business

2001 (total responses by %)	
1 = Strongly disagree	19
2	3
3	1
4	1
5	1
6 = Strongly agree	10
Not applicable	62
Missing data	3
	100%

2004 (total responses by %)	
1 = Strongly disagree	23
2	4
3	2
4	2
5	2
6 = Strongly agree	9
Not applicable	54
Missing data	4
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	13%	12%	15%

There was little change over time with this final statement with only 13% of respondents having a score of 4 or more, indicating that they bought an existing business. In addition over half stated that this reason was not applicable. These figures are similar to overall percentages of Australian businesses in that the majority of businesses here are new businesses start-up as opposed to businesses that are purchased or inherited. There was also little difference on newer and established businesses.

In summary, the most prominent reason for locating to Malaga in 2001 and in the 2004 survey was the fact that the area was perceived as a growth area and that land or property was still available. However, there were slight differences between newer businesses and businesses that had been established for a longer period of time on several of the reasons for being in Malaga, which may indicate that newer businesses are giving more overall consideration to where they locate, rather than just price of land and that it is a growth area. This has implications for future marketing of the area as new businesses appear to want locations that offer numerous benefits. The facilities and services mentioned by respondents as lacking in the area may come to be more important when seeking to attract the variety and spread of businesses that are needed to continue to make Malaga a desired business location.

City of Swan services

Several new areas of interest were explored in this survey specifically related to current Council businesses services. Recommendations from the 2001 survey related to the City developing a higher profile with Malaga businesses as there had been a feeling that the City was removed from the area. Over the 3 year period the initiatives such as; the appointment of the Malaga Business Development Officer, a City of Swan Customer Advocate and more web based business information have been implemented. In addition further developed had occurred regarding the local environmental policy to be more inclusive of the needs of local businesses.

Over half (53%) of all respondents were aware of the City of Swan website and just under half (47%) were aware of the Malaga website.

One third (33%) of all respondents were aware of the Malaga Business Development Officer and 16% were aware of the Customer Advocate. It should be noted that the development officer started out as a part-time position in 2002 and was only made a full-time position in 2004 and the customer advocate position was only created in 2004 so the awareness for these relatively new positions is good.

Only 11% of respondents were aware of the City's cleaner production program but an encouraging 66% of respondents indicated that they would be willing to participate in an industry specific program.

The Respondent's Views on Malaga

This section related to the core question of whether Malaga should be primarily an industrial area or whether it should be opened up for general usage and what facilities or services were lacking in Malaga. So as not to be negative about the area, given that Malaga is a growing

area, respondents were also asked to say what was the best thing about having a business in Malaga.

Do you think Malaga is a place that should be reserved specifically for industry (not general business)?

2001 (total responses by %)	
1 = Strongly disagree	34
2	14
3	16
4	11
5	8
6 = Strongly agree	11
Not applicable	5
Missing data	1
	100%

2004 (total responses by %)	
1 = Strongly disagree	40
2	14
3	14
4	12
5	5
6 = Strongly agree	8
Not applicable	5
Missing data	2
	100%

	2004 total	Under 3 years	Over 3 years
Agreement with statement (4 and over)	25%	20%	28%

There has been a change over time on this issue with fewer respondents in 2004 than in 2001 agreeing that Malaga should be primarily industrial (25% compared to 30%). Further 40% strongly disagreed, which is the highest dissent on any statement. There is also a difference within the 2004 cohort with even fewer of the newer businesses agreeing with this statement. It would appear that most Malaga businesses and especially the newer businesses want a broader mix of business and industry in the area. This statement also had a very low 'not applicable' percentage (5%) and non response (2%) which indicates that the vast majority of respondents had an opinion on this matter.

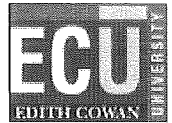
The facilities and services that Malaga lacked include access to broadband or ASDL, cafes and restaurants, banking and other general retail, including postal facilities. Broadband was not mentioned in the 2001 survey but both cafes and restaurants, banking and other general

retail were, so this is clearly still an area of discontent with some businesses. The aspect of security was also important with 18% of all respondents stating this as an area of concern.

On the positive side in relation to what were the best reasons for having a business in Malaga, 23% of respondents stated that Malaga was a good location for their business followed by good accessibility and affordability and the fact that they thought it was an expanding area with growth opportunities.

Overall more respondents (79%) preferred a best reason compared with 62% who gave an area for improvement, leading to the conclusion that most business owners were content with being located in Malaga and had no plans to leave. There were still however some areas that do need some improvement, some of which the City may be able to do something about but there are some that are out of the jurisdiction of the City. Continued close consultation by the Malaga Business Operators with the City of Swan and other key organisations should provide the impetus for successful business development in the area.

APPENDIX 1. THE QUESTIONNAIRE



Your Business

- What is your business? (eg. panel beater, cabinet maker, deli/café – please be as specific as possible)

- Is your business:
 - ₁ Wholesale
 - ₂ Retail
 - ₃ A combination of both
- Is your operation in Malaga: (please tick one box only)
 - ₁ Independently owned & operated
 - ₂ A head office company
 - ₃ A subsidiary or branch company
 - ₄ A franchise
 - ₅ Other (please specify) _____
- What is your position/job title?
 - ₁ Owner ₂ Manager
 - ₃ Supervisor
 - ₄ Other (please specify) _____
- How many years has the business been in operation?

- How many years has the business been in Malaga?

- Has this business only been located in Malaga?
 - ₁ Yes ₀ No
 - a) If no, where was your business located previously?

 - b) How long did your business operate at its former location?

 - c) What was your primary reason for moving?

- How many people work in this business (**including** yourself)?
 - _____ Full-time
 - _____ Part-time
 - _____ Casual
 - _____ Temporary/contract
- Do you employ trainees or apprentices?
 - ₁ Yes ₀ No
 - a) If yes, how many?

 - b) What areas of operation do they work in?

Your Customers/Clients

- Where are the **majority** of your customers located? (please tick one box only)
 - ₁ Within Malaga ₄ All of WA
 - ₂ Eastern States ₅ Eastern Region of Perth
 - ₃ Metro Perth ₆ Overseas
- Do you export any of your products?
 - ₁ Yes ₀ No
 - a) If yes, where is your main market?

 - b) How much of your product is exported?
_____ %

Your Employees

- Do the **majority** of your staff live within 10 minutes drive from Malaga?
 - ₁ Yes ₂ No ₃ Not sure
- How do the **majority** of your staff get to work? (please tick one box only)
 - ₁ Car/motorcycle ₂ Bicycle
 - ₃ Public transport ₄ Walking
 - ₅ Other (please specify) _____
 - a) If by car, do they:
 - ₁ Drive? ₂ Car pool? ₃ Don't know

Your Suppliers (business inputs)

- Where are the **majority** of your suppliers located? (please tick one box only)
 - ₁ Within Malaga ₃ All of WA
 - ₂ Other States ₄ Eastern Region of Perth
 - ₃ Metro Perth ₇ Overseas

Your Use of Technology

- Does your business use email or the Internet?
 - ₁ Yes (Go to Q17) ₀ No
- Does your business intend to get access to email or Internet?
 - ₁ Yes ₀ No (Go to Q21)
 - a) If yes, do you intend to get one within:
 - ₁ one year ₂ two years

17. Do you conduct business online?

₁ Yes ₀ No

a) If no, why not?

b) If not, do you feel you need assistance?

₁ Yes ₀ No

18. Do you have broadband?

₁ Yes ₂ No ₃ Don't Know

a) If yes, what type?

19. Do you think broadband access would improve your business?

₁ Yes ₀ No

20. Do you use the Malaga business website?

₁ Yes ₀ No

Your Business Expectations

21. Are you expecting to expand your business within the next 12 months?

₁ Yes ₂ Not sure ₃ No (please go to Q24)

If yes/not sure, do your plans include:

a) Employing more staff?

₁ Yes ₀ No

If yes, approximately how many?

b) Investing in new equipment?

₁ Yes ₀ No

c) Developing new products or services?

₁ Yes ₀ No

d) Developing new local markets?

₁ Yes ₂ No

e) Developing new international markets?

₁ Yes ₀ No

f) Moving to larger premises within Malaga?

₁ Yes ₀ No

g) Expanding on existing site?

₁ Yes ₀ No

h) Moving out of Malaga?

₁ Yes ₀ No

If yes, where & why?

22. Do you require assistance in achieving any of the above goals?

₁ Yes ₀ No

a) If yes, what type of assistance? (ie grant applications, HR Management)

23. Do you conduct any research and development?

₁ Yes ₀ No

a) If yes, what percentage of your turnover?

Business Support Services

24. Are you aware of the business services or programs

offered by:

a) AusIndustry

₁ Yes ₀ No

AusTrade

₁ Yes ₀ No

b) City of Swan

₁ Yes ₀ No

Malaga BEC

₁ Yes ₀ No

c) Chamber of Commerce and Industry

₁ Yes ₀ No

d) Department of Industry and Resources

₁ Yes ₀ No

e) Malaga Districts Business Association

₁ Yes ₀ No

f) Small Business Development Corporation

₁ Yes ₀ No

25. Do you use these services?

₁ Yes ₀ No

a) If yes, which ones?

26. What is your preferred method of accessing information?

₁ Email ₂ One-to-one

₃ Seminar ₄ Newsletter updates

₅ Other (please specify) _____

27. Are you a member of any business associations?

₁ Yes ₀ No

a) If yes, which ones?

28. Are you a member of any professional associations?

₁ Yes ₀ No

a) If yes, which ones?

29. Are you aware of the cleaner production program?

₁ Yes ₀ No

30. If the City of Swan facilitated an environmental program specific to your industry would you participate?

₁ Yes ₀ No

31. What are key environmental concerns specific to your industry?

Reasons for Being in Malaga

Please circle a number from 1 (Strongly Disagree) to 6 (Strongly Agree) that best describes why you chose Malaga as your business location. If the question is not applicable or you are not sure, please circle 9. Please answer **all** questions.

I chose Malaga as my business location because...

	Strongly Disagree					Strongly Agree	Not applicable
32. It is close to my suppliers	1	2	3	4	5	6	9
33. It is close to my customers	1	2	3	4	5	6	9
34. It is close to my home	1	2	3	4	5	6	9
35. It is close to major roads	1	2	3	4	5	6	9
36. Space/land was readily available	1	2	3	4	5	6	9
37. It is close to other industrial areas	1	2	3	4	5	6	9
38. It is close to the airport	1	2	3	4	5	6	9
39. It is close to Perth's CBD	1	2	3	4	5	6	9
40. I liked the look of the area	1	2	3	4	5	6	9
41. I liked the lease/rental prices	1	2	3	4	5	6	9
42. I liked the price of land	1	2	3	4	5	6	9
43. I liked the price of nearby housing	1	2	3	4	5	6	9
44. I liked the council rates	1	2	3	4	5	6	9
45. It is a growing area	1	2	3	4	5	6	9
46. It is a good investment area	1	2	3	4	5	6	9
47. I bought an existing business	1	2	3	4	5	6	9
48. Other (please specify) _____	1	2	3	4	5	6	9

49. When choosing Malaga, did you consider any other areas?

₁ Yes ₀ No

a) If yes, where?

50. What are the best reasons for having a business in Malaga?

51. What are areas in which Malaga could be improved?

Your Views on Malaga

Please circle a number from 1 (Strongly Disagree) to 6 (Strongly Agree) that best describes why you chose Malaga as your business location. If the question is not applicable or you are not sure, please circle 9.

Do you think that Malaga...

	Strongly Disagree					Strongly Agree	Not sure
	1	2	3	4	5	6	9
52. Is a place that should be reserved specifically for industry (not retail business)?							

53. From a business point of view, does Malaga lack any facilities?

₁ Yes ₀ No

a) If yes, what are they?

NATIONAL LIBRARY OF AUSTRALIA

54. Would you like to take part in a discussion about issues concerning doing business in Malaga?

₁ Yes ₀ No

(If yes, please ensure you complete your details at the end of this survey)

The City of Swan

55. What services have you used in the past 12 months? (ie planning & development, environmental health, sustainability programs)

56. Are you aware of the:

- | | | |
|------------------------------------------------------------------------------------------------|-------------------------------------------|------------------------------------------|
| a) City of Swan website (www.swan.wa.gov.au) | <input type="checkbox"/> ₁ Yes | <input type="checkbox"/> ₀ No |
| b) Malaga website (www.malagabusiness.com.au) | <input type="checkbox"/> ₁ Yes | <input type="checkbox"/> ₀ No |
| c) Malaga Business Development Officer | <input type="checkbox"/> ₁ Yes | <input type="checkbox"/> ₀ No |
| d) City of Swan Customer advocate | <input type="checkbox"/> ₁ Yes | <input type="checkbox"/> ₀ No |

About Yourself (optional)

57. Are you: ₁ Male ₂ Female

58. Your age: ₁ Under 30 ₂ 31 – 40 ₃ 41 – 50
₄ 51 – 60 ₅ Over 60

59. What is your home postcode? _____

Please fill in your name and contact details, or attach your business card so that you can go into the prize draw to win a **\$250.00** voucher to be spent at any Malaga business of your choice.

Name: _____

Business: _____

Address: _____

Telephone: _____

Thank you for taking time to complete this questionnaire. Your answers will be very helpful in assisting the City of Swan in formulating better business strategies for Malaga.