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Research Report

Business Survey of the Penrose-Te Papapa Business Precinct

Prepared by Gravitas Research and Strategy Ltd on behalf of Auckland City Council

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Executive Summary

1. Introduction

This research was undertaken to provide Auckland City Council with greater understanding of the views of businesses in the Penrose-Te Papapa business precinct and in particular the key locational linkages and economic drivers of the area as well as identifying key opportunities and issues facing the precinct.

The survey was conducted using a telephone enhanced online survey approach. This involved businesses being contacted by telephone by project staff experienced in high level business to business recruitment. An e-mail was then sent to potential respondents which included a link to the online survey. Hard copy surveys were made available to any respondent that did not have internet access. The target respondent was the person responsible for location decisions, often the CEO or equivalent. A process of reminder calls and follow-up emails was also conducted, to encourage participation.

During the surveying period (Tuesday 4th November 2008 – Friday 5 December 2008), 960 companies were approached and e-mails with the online survey link were sent out to 805 potential respondents. By the end of the surveying period 328 completed surveys had been received which equates to a response rate of 34 percent.

The questionnaire consisted of a mix of open-ended and close-ended questions. Data from the open-ended questions has been coded to allow statistical analysis.

2. Key Findings

The key findings of this research are:

<u>Nature of the Area</u>

- The Penrose-Te Papapa business precinct contains a wide range of businesses. Reflecting the industrial nature of the precinct, thirty percent of businesses surveyed identify themselves as belonging to the manufacturing sector. However, other industries are also represented throughout the precinct. Some examples of these include:
  - Construction (10 percent);
  - Transportation, Postal and Warehousing (10 percent);
  - Accommodation and Food Services (5 percent);
  - Health Care and Social Assistance (2 percent); and
  - Financial and Insurance Services (1 percent).

- The majority of businesses surveyed are medium-large, with 62 percent of the sample employing 10 or more employees and 22 percent employing 50 or more. Additionally, 60 percent of respondents state their business has a turnover of more than $1 million per year, with 20 percent having a turnover greater than $5 million per year.
- The research also identified Penrose-Te Papapa as a stable location for business with 61 percent of respondents having been located in the area for more than ten years, and 31 percent of respondents have been located in the area for over twenty years.
- A strong sense of business to business networking is evident amongst businesses in the area with most businesses indicating they have either supply or demand linkages in the area. Evidence of some business clustering is also apparent and a preference to use local suppliers where possible is indicated in respondent's comments.

Key Attractors

- Respondents regard the Penrose-Te Papapa business precinct as having a number of advantages. Good access to the motorway and to the rest of Auckland was mentioned as an advantage by 73 percent of respondents, whilst 29 percent of respondents commented on the advantage of the area being in a central location. Eighteen percent of respondents commented on easy access to and from the airport, port and railways as an advantage. Some comments that were made include:

  - "Hub of industrial Auckland, close to the CBD and the motorway connections north and south."
  - "Central location allows quick access to the Auckland CBD and Manukau City central business district."

- Respondents who have been located in the Penrose-Te Papapa business precinct for less than five years point to Penrose-Te Papapa being a well priced location and the availability of suitable buildings or location as the key attractors of the area.

Vision for the Area

- When asked to comment on their vision for the Penrose-Te Papapa business precinct respondents identified several key themes in describing their vision, including:
  - That it should be promoted as a strong business area, a hub or one stop supply area;
  - Improvements to the look and environment of the area;
  - Portraying an image of a modern, efficient, integrated and significant business park type area;
  - Traffic and roading improvements;
  - Provision of public transport; and
  - More recreational areas and green spaces.

- Some comments made include:

  - "A more pleasant place that is attractive for staff and business as a better working environment."
  - "Become recognised as a leading manufacturing area again."
  - "Less congested links to motorway system."
  - "Better public transport."
  - "More green areas and better design."

Expansion

- Participants in the survey are optimistic about the future of their business with 59 percent of respondents stating that their business intends to expand over the next five years. Additionally, twenty-seven percent of respondents predict that they will be employing more staff in five years time than they do now.
- The majority of respondents also demonstrated an interest in the future economic development plans for the area with 61 percent saying they would like to receive more information on economic development in the Penrose-Te Papapa or wider Auckland area.

Influential Factors on Location

- Access to motorways is regarded by respondents as being the most influential factor in decisions relating to their current and future locations. Fifty-three percent of respondents rank this factor as 'very influential' for their current location whilst 67 percent of respondents who intend to move or expand within the next five years rank it as 'very influential' for their future location.
- Other high ranking factors for both current and future location decisions include:
  - Access to customers and/or clients (45 percent rank this as 'very influential' for their current location compared to 47 percent for a future location);
  - Availability of space for use (41 percent rank this as 'very influential' for their current location compared to 66 percent for a future location); and
  - Affordability of space for use (39 percent rank this as 'very influential' for their current location compared to 66 percent for a future location).

Desired Improvements

Throughout this research, respondents have consistently commented on traffic and transport related issues as a not so positive aspect of the Penrose-Te Papapa business precinct.

- When asked what the disadvantages of the Penrose-Te Papapa area were, 43 percent commented that there was too much traffic congestion and a further 12 percent mentioned access into and out of the area. Some comments that were made include:

  - "Traffic getting on to the motorway system can and often is congested in one or both directions. What could be a 10-15 minute trip can often into a 30-40 minute trip."
  - "Excessive traffic and narrow streets, need to stop large vehicles using this as a through road to the airport."

- Traffic issues are also mentioned by respondents when outlining their desired improvements for the area. Twenty-two percent of respondents mention that traffic congestion should be improved whilst 15 percent comment on improving access to the motorways. Some selected comments are included below:

  - "The access to the motorways at peak times is very slow, sometimes taking longer to get on the motorway than the rest of the trip itself."
  - "Further improvements to the traffic flow, coordination of traffic lights to improve traffic flow, clearly marked right turn lanes that allow following traffic to pass vehicles turning right, turn in lanes that allow a vehicle to enter a road at an intersection and merge in with traffic. A requirement that off-street parking is a requirement for all new developments."

- Additionally, 35 percent of respondents regard traffic congestion and roading as an issue or threat to the Penrose-Te Papapa business precinct that if not resolved will affect the future business development of the area. Some examples of comments made by respondents are included below:

  - "Gridlock at ever extending peaks. It is the road transport hub for most of Auckland and with considerable regional and national importance and that business needs to remain here due to its closeness to port/port links and major users. If the area becomes too hard to operate from, the indirect economic costs will be significant due to longer journeys and greater pressure on major routes and the area itself will die."
  - "The main threat of not improving roading could potentially put [off] investors/businesses moving to the area."

- Furthermore, respondents indicated their concern for congestion and roading issues when asked to select from a list of the major transport issues for their business. Eighty-four percent of respondents selected traffic congestion on surrounding roads as a major issue for their business whilst 63 percent chose accessibility of motorways. Fifty-five percent of respondents also highlighted freedom of vehicle and freight movement within the industrial area as a major issue for their business.

<u>Public Transport</u>

- Whilst public transport does not rate highly as an influential factor for location decisions by respondent's (10 percent of respondents rank access to public transport as 'very influential' as a factor in making their current location decision). One third of all respondents (31 percent) indicate that the provision of public transport in the area does not meet their need.
- The need for more train access (26 percent) and better public transport access to and from certain areas such as East and West Auckland (21 percent) were most often cited as the reason why public transport did not meet respondent's needs. Some comments include:

  - "Staff and even ourselves could well advantage from decent train service. The tracks are there and being improved. It needs to be frequent stopping points as not everyone wants to walk 2km off the train."
  - "There are no direct links from outlying areas in the Auckland region. People from West Auckland or the North Shore have to go to the central city first. This causes an increase in cost and time. This has limited our ability to attract some potential employees."

- Furthermore, when asked to identify their desired improvements for the area, 9 percent of respondents comment on developing better public transport facilities and promoting public transport as an option for travel to and from the area.

<u>Cost of Land</u>

- The increasing cost of land throughout the Penrose-Te Papapa business precinct emerged as a less positive aspect of the area with 60 percent of respondents indicating that there is at least some impact of cost of land on their location decisions. Selected comments made by respondents include:

  - "At present we are on reasonable rent that is affordable, however a recent review by the landlord has resulted in a request to almost double the current amount. Due to the financial climate this increase has been shelved for 6 months however a move to a cheaper area may be a requirement in the near future."
  - "Would prefer to own premises to insulate against rising lease costs but values are too high. Am concerned lease costs for area could necessitate relocating out of area."

Conclusion

This research has identified many positive aspects to the Penrose-Te Papapa business precinct including the diversity of businesses located there, the area's good access to the motorways and its central location. Many businesses have been located in the precinct for a long time, indicating the stability of their business, respondents are also positive about the future of their business in Penrose-Te Papapa.

Many respondents also have a clear vision for the precinct which includes Penrose-Te Papapa being promoted as a strong business area, a hub or one stop supply location, portraying the precinct as a modern, efficient, integrated and significant business park type area and traffic and roading improvements.

The majority of respondents have also demonstrated an interest in being informed of future economic development initiatives for Penrose-Te Papapa and for the wider Auckland region.

However, it is also clear that many respondents are concerned about traffic and roading issues as well as the increasing cost of land throughout the Penrose-Te Papapa business precinct.

1. Research Objectives and Method

1.1. Objectives

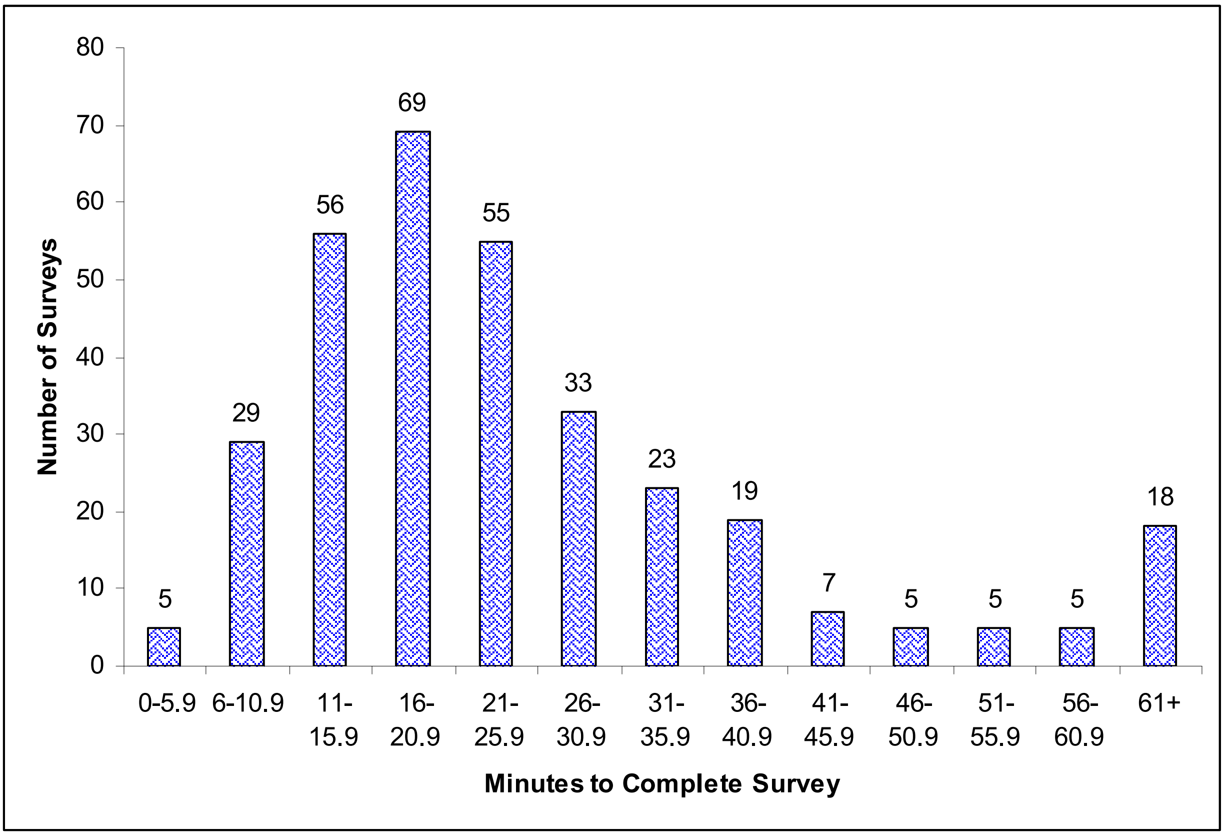
This research was undertaken to provide Auckland City Council with greater understanding about the Penrose-Te Papapa business precinct and in particular the locational linkages, and economic drivers of the precinct as well as identifying key opportunities and issues it faces.

1.2. Method

Based on discussions with Auckland City Council, a telephone enhanced online survey approach was used for this research (whilst offering hard copy surveys to those without internet access). Gravitas used the following survey process:

- Compiling a suitable sample of target organisations by drawing on the lists provided by Auckland City Council.
- Phone recruiting for the survey commenced on Tuesday 4th November 2008.
- An initial telephone contact to introduce the study, ask for participation and gather e-mail addresses. This approach was made by project staff experienced in high level business to business recruitment.
- An e-mail was promptly sent to respondents containing a link to the online survey.
- A follow up phone call or e-mail was used to remind businesses that had not completed the survey within three days of receiving the survey link.
- A final e-mail was sent out on Tuesday 25th November to advise all businesses of the date that the survey would be closed and to encourage them to complete the survey.
- The online survey was closed at 10am Friday 5th December 2008.
- The Gravitas business-to-business recruiters attempted to contact 1628 companies.
    - 416 companies had no phone number listed.
    - 252 businesses from the phone sample were unable to be contacted:
        - 81 were duplicated companies from the sample;
        - 79 had their phone line disconnected;
        - 54 had moved out of the target precinct; and
        - 38 were not able to be contacted for a variety of other reasons.
    - Therefore 960 businesses were contacted.
        - 805 businesses were recruited and sent an e-mail or letter containing the survey
- There are 328 completed surveys. This gives a response rate of 34 percent.
- Returned surveys had the open ended data coded and the results compiled into a database for analysis.

Figure 1-1: Length of time for respondents to complete the online survey



The online survey software that we used for this research is able to generate a report on how long respondents take to complete the online survey. Note: This data records how long the survey is open on a respondents desktop and takes no account of time spent working on (or away from) the survey. Some respondents will have interrupted their completion to do other tasks.

The average length of time required to complete the survey was 26 minutes**.**

1.3. Questionnaire

The questionnaire was designed by Auckland City Council. Content included:

- Business perceptions of the Penrose-Te Papapa business precinct;
- Local and external linkages for business;
- Factors for current business location;
- Issues for businesses in the Penrose-Te Papapa precinct;
- Future expansion plans for respondents organisation; and
- Open-ended questions were included to allow respondents to write in comments.

Key classification information (location, length of operation, number of employees etc.) and information about the organisation itself (industry sector, key products and services etc.) was also collected. A copy of the questionnaire is appended.

Note: An option to answer “don’t know” to questions 9, 12, 13, 14, 15, 19, 25, 29 and 30 was added after the survey had been in the field for approximately 10 days due to respondent feedback. An option to respond “I prefer not to answer this question” was also added to questions 29 and 30 at the same time. Separate analysis of results before and after these options were added has been included.

1.4. Sample Profile

The sample of businesses (n=1649) to contact for this research was provided by Auckland City Council.

2. Business classification

2.1. Industry Sector

Respondents were asked to select which industry sectors they belonged to.

Table 2-1: Distribution of Respondents by Specific Industry Sector (%)

Industry Sector	Share of Sample
Metal Product Manufacturing	12
Other Manufacturing	8
Construction Trade Services	7
Services to Transport	6
Motor Vehicle Retailing and Services	6
Basic Material Wholesaling	5
Food, Beverage and Tobacco	4
Business Management, IT and Employment Related Services	4
Machinery and Equipment Manufacturing	3
General Construction	3
Textile, Clothing. Footwear and Leather Manufacturing	3
Printing, Publishing and Record Media	3
Other	4

Base: All responses mentioned by 3% or more of respondents. Note: Multiple responses permitted for this question so table may total more than 100%.

The industry sectors contained in the survey were considered to be too specific and would yield sample sizes too small for useful analysis. Therefore, businesses were coded into a smaller group of industry sectors (sourced from Statistics New Zealand).

Table 2-2 Industry Sectors for Analysis (%)

Industry Sector	Share of Sample
Manufacturing	30
Construction	10
Wholesale Trade	10
Transportation, Postal and Warehousing	10
Professional, scientific and technical services	8
Retail Trade	7
Accommodation and Food Services	5
Other	5
Electricity, Gas and Waste Services	3
Information, media and telecommunications	3
Rental, hiring and real estate services	2
Education and training	2
Health care and social assistance	2
Arts and recreation services	1
Financial and Insurance services	1
Agriculture, Forestry and Fishing	1

Base: All respondents (n=328).

The responses to this question reflect the diversity of businesses within the Penrose-Te Papapa business precinct. Whilst almost a third (30 percent) of respondents are in the manufacturing sector there is a broad spread of other sectors that are represented within the area including Construction (10 percent), Retail Trade (7 percent), Electricity, Gas and Waste Services (3 percent) and Arts and Recreation Services (1 percent)

2.2. Exact Nature of Business

Q28. Please describe the exact nature of your business and what your business outputs are (for example: what do you produce and what are your main services)?

Responses to this question covered a broad range of products and services which further reflects the diversity of businesses within the Penrose-Te Papapa business precinct. The products and services identified by this question are too varied for any meaningful analysis to be undertaken. However, a selection of responses has been included below to illustrate the diversity of the area:

> "Architectural metalwork and furniture manufacture and import."
>
> "Building systems products and services."
>
> "Charity – book offers into low decile schools nationwide for every child in the school."
>
> "Digital printing."
>
> "Distribution of marine and industrial controls."
>
> "Education provider."
>
> "Electrical contractor."
>
> "Financial and insurance services to domestic households."
>
> "Food and beverage service."
>
> "Import and distribution of electric motors."
>
> "IT services."
>
> "Manufacture of non-ferrous metals products and distribution of equipment and roofing products."
>
> "Metal removal tools."
>
> "Panelbeating."
>
> "Powder coaters."
>
> "Professional sports team."
>
> "Property valuation reports."
>
> "Retail of firearms."
>
> "Service and installation of industrial pumps and related equipment."
>
> "Transport services."
>
> "Waste collection and disposal."

A complete list of products and services is available upon request.

2.3. Ownership of Premises.

Respondents were asked whether they owned the premises in which their business is located.

Table 2-3: Do you own the Premises where your business is located (%)

	Share Of Sample (n=328)
No	63
Yes	37

Base: All respondents (n=328).

The majority of respondents lease their business premises with almost two-thirds (63 percent) of respondents stating they do not own the premises that their business is located in.

Analysis of results by number of employees and industry sector shows consistency with the overall results.

2.4. Turnover

Respondents were asked for their businesses annual turnover.

Table 2-4: Annual Turnover (%)

New Zealand $	Share of Sample (n=328)
Under $100,000	2 (1)
$100,000 – $250,000	2 (2)
$250,000 - $500,000	5 (5)
$500,000 - $1 million	8 (5)
$1 million - $2 million	14 (19)
$2 million - $5 million	19 (21)
$5 million - $10 million	10 (5)
$10 million and above	25 (15)
Don’t know	1 (1)
I prefer not to answer this question	9 (23)
Blank/Did not answer	5 (3)

Base: All respondents (n=328). Note: A decision to add the options to answer “Don’t Know” and “I prefer not to answer this question” was added after the survey was in the field due to feedback from some respondents, the percentage in brackets denotes the results after these options were added (n=127) whilst the unbracketed figure represents the percentage of total responses (n= 328)

The majority of businesses surveyed have a reasonably substantial turnover indicating a significant proportion of large businesses that are present in the area. Only 17 percent of businesses have a turnover of $1 million or less. Over two thirds (68 percent) indicate a turnover of over $1 million per annum, over one third (35 percent) of over $5 million and one quarter of businesses have a turnover of $10 million or higher.

Analysis of data after the options to answer don't *know* or *I prefer not to answer this question* was added shows that 21 percent of respondents have a turnover of *$2 million -$5 million*. Almost one-in-four (23 percent) of respondents answered *I prefer not to answer this question*. One in five (19 percent) of respondents have a turnover of $1 million - $2 million and 15 percent of respondents have a turnover of $10 million and above.

2.5. Length of time in Penrose-Te Papapa precinct

Respondents were asked how long their business has been located in the Penrose-Te Papapa precinct.

Table 2-5: Length of operation in Penrose-Te Papapa precinct (%)

	Share of Sample (n=328)
0-1 Years	1
1-5 Years	15
5-10 Years	23
10-15 Years	17
15-20 Years	13
20-35 Years	18
35+ Years	13

Base: All respondents (n=328).

Most businesses are long term with over 60 percent of businesses being located in Penrose-Te Papapa for over 10 years. Almost one third (31 percent) of businesses have been in the area for 20 years or more.

Half (50 percent) of respondents from the manufacturing industry have been operating in the Penrose-Te Papapa business precinct for 20 or more years (27 percent operating between 20-35 years and 23 percent operating for more than 35 years, significantly more than the overall sample).

Respondents who answered that they have been in the Penrose-Te Papapa area for less than five years were given an opportunity to say what area they had relocated from.

Table 2-6: Location of business before relocation to Penrose-Te Papapa (%)

	Share of Sample (n=50)
Other central Auckland	40
CBD fringe (Newmarket, Parnell, Ponsonby)	12
Other Penrose-Te Papapa location	8
West Auckland	6
Auckland CBD	6
East Auckland	6
Did not answer	18

Base: All respondents (n=50). Note: Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

Forty percent of these respondents stated they came from *other central Auckland*, whilst 12 percent of respondents relocated from the *CBD fringe (Newmarket, Parnell, Ponsonby)*.

2.6. Number of Employees

Respondents were asked how many people are employed in their business.

Table 2-7: Number of Employees (%)

	Share of Sample (n=328)
0	1
1-5	21
6-9	16
10-19	24
20-49	16
50-99	11
100+	11

Base: All respondents (n=328).

Over 60 percent of businesses have 10 or more employees and over one fifth (22 percent) have more than 50 employees. One in five (22 percent) businesses has 5 or fewer employees.

3. Business' Perceptions of Penrose-Te Papapa business precinct

3.1. Advantages of current location.

The first question in the survey offered respondents the opportunity to list the specific advantages of their current location. This was an open-response question.

Analysis of the verbatim responses to this question identifies good access to the motorway and the benefits of being in a central location as significant advantages to the Penrose-Te Papapa business precinct. Comments made include:

> "Central location allows quick access to the Auckland CBD and Manukau City central business district."

> "Close proximity to arterial routes North, East, South and West."

> "Geographically in the middle of Auckland, near south and south eastern motorways, near Penrose railway station."

> "Hub of industrial Auckland, close to the CBD and the motorway connections north and south."

> "Good access to motorways."

Some respondents commented on being close to customers, suppliers and services as a key advantage to being located in the Penrose-Te Papapa business precinct:

> "Close to our major customers."

> "Ready access to essential suppliers who are also in the same area."

> "Central to many large businesses, which is important for our business."

> "Central with regard to customers, access to suppliers and services."

> "Local area includes the kind of trades and services we deal with, i.e. lots of business done locally."

The benefit of the location for employees is also commented on by a number of respondents:

> "Relatively central location for staff who come from all over Auckland to access."
>
> "Suitable location for our labour pool."
>
> "Central location makes it easy for staff from different parts of the city to commute."
>
> "Parking available for staff and not too far from bus and rail routes."

Other comments made by respondents include:

> "High exposure to traffic."
>
> "Excellent access to Sylvia Park shopping complex and transport facility."
>
> "Established businesses in the area."
>
> "Close to my home for commuting."
>
> "Good public transport including rail."
>
> "Well serviced by banks, post office, stationary and Council services."
>
> "Good selection of cafes for staff and business."
>
> "Cheap rent."

Responses were coded into logical groups to provide quantification of these comments. Many respondents' comments included several different; each was coded separately to show the weight of support for each and is included in the table below.

Table 3-1 Advantages of the Penrose-Te Papapa business precinct (%)

	Share Of Sample (n=328)
Good access to motorway and rest of Auckland/ease of access to main roads	73
Central location	29
Easy access to and from airport, port and railways	18
Central location is good for our customers	16
Close to our suppliers/services/clients/retail	15
Good/close access to other businesses/industrial neighbours/industrial areas	12
Lots of available parking	7
Central location makes it easy for staff access	7
Close to home	5
Low cost/rental cost of property	4
Good road frontage/corner location	4
Large volumes of daily traffic	3

Base: All respondents (n=328). Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

A central location with good motorway, main arterial and other transport links are the defining advantages of the area.

Analysis by industry sector continues to identify *good access to motorway and rest of Auckland/ease of access to main roads* as the most frequently identified advantage of the Penrose-Te Papapa business precinct.

Analysis of the advantages of the Penrose-Te Papapa business precinct by number of employees also yields results consistent with the overall ratings. Notable exceptions include; 89 percent of businesses with more than 100 employees mentioned *good access to motorway and rest of Auckland/ease of access to main roads* as being an advantage (a statistically significant difference from the total sample). Larger organisations are more likely to mention *central location makes it easy for staff access* is as an advantage (mentioned by 17 percent with 100+ employees compared with 1 percent of organisations with 1-5 employees).

3.2. Disadvantages of current Location.

Respondents were then asked to list any specific disadvantages of their current location. This was an open-response question.

When analysed, the responses to this question show that traffic congestion and access into and out of the area is a disadvantage to the Penrose-Te Papapa business precinct for many respondents. Comments made include:

> "Excessive traffic and narrow streets, need to stop large vehicles using this as a through road to the airport."
>
> "High traffic flow at peak times brings traffic to a standstill."
>
> "Situated on a busy road with regards to gaining entry and exiting the premises."
>
> "Road is busy and can be unsafe when pulling out into the street."
>
> "Traffic congestion at peak time. Transport company using XXXX Road to manoeuvre trucks holding up traffic for several minutes several times a day."
>
> "Traffic getting onto the motorway system can and often is congested in one or both directions. What should be a 10-15 minute trip can often turn into a 30-40 minute trip."
>
> "Difficult to easily get on the motorway to go south."
>
> "Too many trucks in the area – dangerous driving – difficult to turn right into Neilson Street – drivers take too many risks."

A number of respondents raised a concern regarding the security of the area and perceived Penrose-Te Papapa as having a high crime rate. Comments included:

> "Boy racing activity in the weekend, a real nuisance including damage to buildings and sand from the clean up entering our building."
>
> "High crime area."
>
> "Many thieves and robbers in the area."
>
> "Security – too many break ins. Was once the worst commercial area in Auckland."
> "Graffiti and crime hot spot."
>
> "Vandalism."

There are a variety of others comments made be respondents regarding the disadvantages of the Penrose-Te Papapa business precinct. Some of these included:

> "Lack of local facilities, i.e. cafes, gyms, parks and green areas."
>
> "Fragile infrastructure for electricity supply, and stormwater (constant flooding in Great South Road."
>
> "Lack of high-speed internet access."
>
> "A lot of the businesses are in older buildings with restricted parking and roadside parking is relied on for both customers and staff. The street could be very easily modified to take angle parking which would allow much more efficient use of the available area."
>
> "Residential properties have been built recently bordering the property and we have had noise complaints from the property owners for using our vehicles near the boundary fences, while performing our standard duties."
>
> "Lots of dust and dirt in the air from nearby factories."
>
> "Non-pedestrian friendly."
>
> "The intersection of Victoria Street and Neilson Streets is an absolute death trap. Exiting from the southern side of Victoria Street is a major hazard especially with the number of courier vehicles and recycling trucks using the intersection. Traffic lights must be installed ASAP."

Responses were coded into logical groups to provide quantification of these comments. Many respondents' comments included several different components; each was coded separately to show the weight of support for each and is included in the table below.

Table 3-2: Disadvantages of the Penrose-Te Papapa business precinct (%)

	Share Of Sample (n=328)
Too much traffic/congestion	43
Access (roads and motorway) into/out of the area	12
Shortage of car parking	7
Unattractive environment (area looks run down and shabby)	6
Too many heavy vehicles in the area/roads not designed to cater for them	6
Poor road planning/need for more traffic lights	5
Roads/streets poorly designed/too narrow	5
No or limited public transport access	5
Poor security (high crime area)	5
Too far away from retail/clients/facilities/cafes	4
Too industrial	4
Too much pollution (noise and air)	4
Lack of decent cafes/lunchbars/restaurants	3
High rents	3
Limited room to expand	3
Undesirable businesses located nearby	3
No disadvantages to the area	9
Did not answer	7

Base: All respondents (n=328). Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

Traffic congestion and access into and out of the area are clearly regarded as the most significant disadvantages to the Penrose-Te Papapa business precinct.

Further analysis of responses by industry sector reveals results that are generally consistent with overall responses. However, respondents with 1-5 employees mention that there are *no disadvantages to the area* (16 percent compared to 9 percent from the overall sample, a statistically significant difference) and *too much pollution – noise and air* (11 percent compared to 4 percent from the overall sample, a statistically significant difference).

Furthermore, respondents with over 100 employees are significantly more likely to mention being *too far away from retail outlets/clients/facilities/no cafes* as a disadvantage to their location than organisations with fewer employees (18 percent compared with 4 percent of overall responses).

3.3. Desired improvements for the precinct over the next five years

All respondents were offered the opportunity to comment on the improvements that they would like to see in the Penrose-Te Papapa business precinct in the next five years. This was an open-response question.

An analysis of comments made by respondents indicates that transport related issues rank highly in the desired improvements for the Penrose-Te Papapa business precinct. Some of the comments made by respondents include:

> "The access to the motorways at peak times is very slow, sometimes taking longer to get on the motorway than the rest of the trip itself."

> "Better access onto Mangere motorway especially during peak hours when traffic congestion is heavy."

> "Better connections to the Southern motorway when heading south; currently have to go down towards Otahuhu."

> "Better feeder roads to motorways."

> "Dedicated link between SH1 and SH20."

> "Further improvements to the traffic flow, coordination of traffic lights to improve traffic flow, clearly marked right turn lanes that allow following traffic to pass vehicles turning right, turn in lanes that allow a vehicle to enter a road at an intersection and merge in with traffic. A requirement that off-street parking is a requirement for all new developments."

> "Improve traffic flow; the access to roads makes it one of the issues with heavy traffic and dangerous driving for employees."

> "Public transport (trains, buses) going across town rather than having to go into Auckland Central and then back out."

> "Specific heavy truck routes with wider roads."

A number of respondents also commented on the look of the area in highlighting the improvements they would like to see made. Some of these comments included:

> "Higher minimum standard for buildings and how they look etc. e.g. better fencing around scrap metal yards."
>
> "Less rubbish. Quicker inorganic rubbish collections annually so that rubbish is not left in the streets for 6 weeks on a main tourist route from the airport."
>
> "The area converted from overhead power lines to underground."
>
> "Tidy it up – somehow clean up the graffiti and litter."
>
> "Area looks tired and untidy compared with Highbrook."
>
> "Area needs better landscaping to reduce the 'industrial' image it has."
>
> "Services that are paid for in the rates being visible e.g. rubbish/litter/dirt on the roads and general area. You may have contactors with contracts but there is rubbish/road silts that don't move for months."

Other comments made regarding improvements that respondents would like to see in the Penrose-Te Papapa business precinct include:

> "Better cycle access and safety for staff who want to commute by bike."
>
> "Cheaper fibre network, too expensive to get high speed internet - $2500 per month!"
>
> "Continuation of development as a business hub for central Auckland."
>
> "Somewhere for employees to enjoy their lunch time out of the office."
>
> "Reliable electricity supply – my understanding is that the experience of the Auckland CBD a number of years ago could happen here."
>
> "An elected 'Business Community Committee' to make submissions and recommendations to the Auckland City Council."
>
> "Sponsorship into carbon footprint reduction programs and perhaps group recycling facilities at a reduced rate rather than businesses paying individually. A business newsletter that advises people on updates of legislation that may affect the businesses within the area. Perhaps also feature businesses that have implemented an environmental system that may be of interest for other businesses to implement in their own facilities."

Responses were coded into logical groups to provide quantification of these comments. Many respondents' comments included several different components; each was coded separately to show the weight of support for each and is included in the table below.

Table 3-3: Improvements for the Penrose-Te Papapa business precinct (%)

	Share Of Sample (n=328)
Improve traffic congestion	22
Improve access to motorway (heading south on SH1, improve access to SW motorway)	15
Better transport planning (traffic lights, no parking zones etc.)	13
Better quality roading/repair roads/upgrade and better access	10
More parking areas/better access to parking areas	9
Better public transport/facilities/promotion	9
Upgrade and rejuvenate premises in area	8
Improve landscape area/plant more vegetation to beautify area	7
Widening of roads/more lanes on roads	7
More clearing of rubbish/tidying up industrial area	7
Additional entertainment/retail and recreation facilities	6
Better pedestrian access (more/better footpaths/pedestrian crossings)	3
Improve internet connection speeds	3
Upgrade of power supply/underground cabling to remove pylons	3
Crack down on crime/graffiti	3
Did not answer	13

Base: All respondents (n=328). Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

The focus of desired improvements is strongly based around transport issues as indicated in the table above.

Analysis of results by industry sector indicates that organisations from the *construction* sector are more likely to mention *better pedestrian access (more/better footpaths/pedestrian crossings)* that other industries (12 percent compared with 3 percent from the overall sample, a statistically significant difference). However respondents from the *construction* sector were also more likely *not to answer* this question (27 percent compared with 13 percent from the overall sample, a statistically significant difference).

Analysis shows that respondents from organisations with 100+ employees are significantly more likely to mention *improve rail links* as an improvement (11 percent, compared with 2 percent from the overall sample).

3.4. Vision for Penrose-Te Papapa business precinct.

All respondents were asked to comment on what the Penrose-Te Papapa business precinct would ideally offer businesses in the next five years. This was an open-response question.

Analysis of verbatim responses for this question identifies a range of themes regarding respondent's vision for the Penrose-Te Papapa business precinct. A number of respondents identified the look and environment of the Penrose-Te Papapa business precinct as a key part of their vision for the area:

> "A more pleasant place that is attractive for staff and businesses as a better working environment."

> "A more visually upmarket, cleaner and more desirable location where 'corporate' type businesses would seriously consider moving to."

> "A safe, clean and inviting area, attracting in other like businesses."

> "That it will continue to improve in looks and landscape."

> "Variety and newer, cleaner look."

Related to the above, the image of a modern, efficient and significant industrial area that the Penrose-Te Papapa precinct portrays is mentioned by a number of respondents when describing their vision. These comments point to an area that gives a sense of being an important industrial location that is well planned and supported with a clear modern identity:

> "A dynamic, clean, Well organised industrial area efficiently and effectively serviced which attracts visitors and customers to the area. A commercial and industrial community with pride!"

> "A highly developed and mobile industrial region with a clean, green and environmentally conscious image."

> "Become recognised as a leading manufacturing area again."

> "It would transform into a more modern industrial area, like for instance, Highbrook."

Some respondents commented on traffic and roading improvements as key components of their vision for the area:

"Less congested links to motorway system."
"Improved access ways for vehicular traffic, reduction of heavy vehicle traffic which would impact on improving the road surface in the area."

"Improved roading systems."

"Less traffic build up, cleaner and greener image."

"Less traffic passing through the area without accessing services in the area."

"Roading to keep up with the growth of industry."

"Traffic congestion is a bit of a frustration, especially getting on to the motorway at Penrose. I would like to see improved roading to reduce these hold ups."

The provision of public transport was mentioned by several respondents whilst describing their vision for the area:

"A railway hub linking to West Auckland and central Auckland."

"Better public transport."

"The most important thing is to improve public transport."

"A public transport system that does not force people to go through the CBD."

"Better public transport links will help us attract staff to work here."

Some responses also highlighted the demand for more recreational areas and green spaces to be developed across the precinct:

"A centre that caters for the workforce, with gyms, large cafes for meeting clients etc."

"A park or close recreation area for walking in at lunchtime without all the traffic fumes."

"A warehouse/light industrial area with a green belt and employee amenities."

"Close and quality self contained business hubs with a small 'green space' and casual business eating etc."

"More green areas and better design."

"Interface residential/industrial zones with green belts."

"I would like it to offer more 'outdoor' leisure/relaxation/sports activity area for business people to enjoy during their working day."

A variety of comments that are not statistically significant but offer interesting points of view on some respondents vision for the area have also been included:

"A safe area which is enhanced by tidy businesses with planted road frontages. An area with clearly stated speed zones and an area that has more stringent 'pollution' zoning (air, water, land)."

"Access to very competitive broadband internet."

"Capped council rates, improved roading, reduction in the cost of compliance for council regulations, incentives to keep businesses within the area (and in New Zealand)."

"Businesses using each other's services. Maybe a list of all the companies in the area."

"More campus style areas with integrated facilities that can be utilised safely after hours."

"Should head towards high-tech industries away from the large polluting industries now here."

"Rapid and clear passage of building consents to encourage new buildings in the area so that the older parts of the area do not drag the rest down."

Responses were coded into logical groups to provide quantification of these comments. Many respondents' comments included several different components that made up their vision for the area; each was coded separately to show the weight of support for each and is included in the table below.

Table 3-4: Vision for the Penrose-Te Papapa business precinct (%)

	Share Of Sample (n=328)
To be promoted as a strong business area/hub/one stop supply area	15
Upgrade/clean-up buildings and businesses/environmentally friendly/no pollution	13
Less traffic congestion/better traffic flow	12
A modern integrated business park/area (like Highbrook/other industrial estates)	11
Good/better access/reliable/linkages to a public transport system	10
Better access in and out of area including freight/motorway access	9
Green spaces/open areas/walkways/gardens/outdoor recreation areas	8
Improved/better/faster motorway access	8
Improved roading – access/infrastructure	8
Safe and secure environment (street lighting at night)	5
More diverse businesses	5
Upmarket cafes/restaurants/more places to buy lunch and take clients	4
Faster technology/compatible infrastructure – broadband /telecommunications	3
Keep residential and retail out (focus on industrial)	3
A nice environment to work in	3
Affordable rents/land/rates	3
Did not answer	30

Base: All respondents (n=328). Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

Analysis by employee numbers indicates similar results to the overall sample. However, respondents from organisations with 50-99 employees were significantly more likely to mention as their vision for the precinct:

- *a modern/integrated industrial park/area (like Highbrook or other industrial estates)* (24 percent, compared to 11 percent from the overall sample); and
- *Faster/Technology compatible infrastructure – broadband and telecommunications* (11 percent, compared to 3 percent from the overall sample).

Analysis by industry sector shows results that are consistent with the overall sample. However, respondents from the *wholesale* sector were significantly more likely to mention *staff amenities and services – childcare/gyms/shops/supermarkets* (9 percent, compared with 2 percent from the overall sample).

3.5. Opportunities for the Penrose-Te Papapa business precinct.

Respondents were asked to identify the potential opportunities for the Penrose-Te Papapa business precinct. This was an open-response question.

Analysis of the responses to this question highlights the variety of answers that respondents give when asked about the opportunities that should be developed further in order to assist the Penrose-Te Papapa business precinct in its future growth or development. A number of respondents comment on the opportunities that exist in promoting the area as a prime industrial and central business location for the Auckland region. Some of the comments made include:

> "An acknowledgement by most people that the area is the heart of the industrial workforce of Auckland and assistance to remain focussed on the area as remaining as such."

> "Because of its closeness to the centre of the city there can be many advantages, mostly in servicing the needs of the CBD and tourism."

> "It is the best placed suburb for service type businesses that rely on any CBD based activity for their livelihood. This could be a central theme for the area."

> "The location is central and staff from all around the city could reasonably be attracted to work here if better quality buildings and transport were available. The location is more attractive than East Tamaki, Albany or Mangere for example."

> "Centrality is critical and advantageous to both manufacturing and supporting businesses."

> "As a central location it will only strengthen business."

A recurring theme is the mention of transport or traffic congestion issues throughout the area. Respondents commented on this in answering this question and some of their responses are included below:

> "A connection with the Mangere and Southern motorway via an expressway through Onehunga would streamline traffic congestion."

> "If we improve traffic flow, get trains going and improve appearance, more people from out of the area will choose to come and spend their money here."

> "Its convenience for road/rail transport (including the Port of Tauranga rail link at Te Papapa) is iconic and that needs to be enhanced with road overbridges added to major intersections to ensure/improve flow e.g. Neilson/Church Sts, Church St/Great South Road (leading to SH1 Motorway and South Eastern Arterial route, Greenlane/Great South Road etc."

> "More central city business will relocate if traffic congestion is addressed."

The development of amenities and improving the image of the precinct is noted by some respondents as an opportunity for the area that needs further development. Some comments regarding this are included below:

> "Removal of noxious industry will provide better air quality and encourage more office and distribution businesses."

> "A better streetscape will mean a better impression on international customers visiting the area, and therefore more likely that deals can be struck."

> "Better presentation will attract more business owners across a wide spectrum of industries."

> "General upgrade of very old buildings that are eyesores."

> "To compete with other areas in attracting new business by improving the local facilities on offer."

> "Other amenities to attract employees e.g. eateries, cafes shops."

Other comments and suggestions made by respondents regarding opportunities for the Penrose-Te Papapa business precinct include:

> "A local business community that met regularly with a local publication."

> "Development of existing vacant land for industrial use."

> "High speed internet will definitely help as Penrose is the head office of our business. Parking is an issue, there is not enough parking for our staff and they get parking tickets on the street."

> "More reciprocal relationships among the existing community groups."

> "Reduce the red tape involved in getting building permits. It took nearly 18 months to resolve a number of issues required to get a building permit for our expansion in Penrose. This resulted in us having to take the costly measure of leasing external storage until the consent was approved and construction could start."

"Security is the major issue for businesses today – burglaries are too high, people living on the streets, there are some creepy people around and the police aren't interested."

Responses were coded into logical groups to provide quantification of these comments. Many respondents' comments included several different components; each was coded separately to show the weight of support for each and is included in the table below.

Table 3-5: Opportunities for the Penrose-Te Papapa business precinct (%)

	Share Of Sample (n=328)
Prime industrial location/central	11
Address traffic congestion issues/roading/signage	11
Beautification/amenities/parking/environment	11
Regulatory/zoning/planning/design	10
Development of rail services/public transport	9
Increase retail/business services to attract more people	5
Better access to motorway	5
Become a desirable place to work/attractive to investors	4
It's convenience for road/rail transport	3
Ability to attract more influential/high technology organisations	3
Direct access to airport	3
Did not answer	41
Other	3

Base: All respondents (n=328). Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

The opportunities mentioned focus around developing the location as a prime industrial site with improvements in traffic congestion and roading, improved amenities, with regulatory planning and design as key influences.

Respondents from organisations with 1-5 employees were significantly more likely not to answer this question (59 percent, compared to 41 percent from the overall sample) whilst respondents from organisations with more than 100 employees were significantly more likely to answer the question (80 percent, compared with 59 percent from the overall sample). Additionally, respondents with 20-49 employees in their organisation were more likely to mention their vision included Penrose-Te Papapa *becoming a desirable place to work (attractive to the labour force)/attractive to investors* (12 percent, compared to 4 percent from the overall sample).

Analysis by industry sector yields similar results to that of the overall sample, although respondents from the *Wholesale* industry sector were significantly more likely to mention *address traffic congestion issues/roading/signage* (25 percent, compared to 11 percent from the overall sample, a statistically significant difference).

3.6. Issues or threats for the Penrose-Te Papapa business precinct.

Respondents were then asked to list the issues or threats that if not resolved will affect future business development. This was an open-response question.

The responses to this question again identify traffic and roading congestion as a perceived issue or threat that will affect future business development for the area. Some comments made include:

> "Gridlock at ever extending peaks. It is the road transport hub for most of Auckland and with considerable regional and national importance and that business needs to remain here due to its closeness to port/port links and major users. If the area becomes too hard to operate from, the indirect economic costs will be significant due to longer journeys and greater pressure on major routes and the area itself will die."

> "Congestion at all hours of the day can be off-putting to potential clients and also makes transport of product more expensive due to costs associated with traffic."

> "Motorway and on-ramp blockages hindering access on to the arterial routes."

> "The main threat of not improving roading could potentially put [off] investors/businesses moving to the area."

> "Traffic congestion."

> "Traffic flows will need to be improved. Even though we are close to the southern motorway it is often clogged and queues form well back from the on-ramps. This must be addressed urgently."

> "Traffic flows. Customers will tend to use outlying area if it is difficult and expensive to use their cars within the area."

> "Traffic is a potential threat in that congestion will stifle the benefits of the location."

Respondents also identified a wide variety of other issues and threats to the Penrose-Te Papapa business precinct in their responses. Some examples of respondent's comments are included below:

> "A more active business syndicate or rather a group should be formed with local business and council representatives which could meet on a bi-annual basis to discuss issues on hand and work together to find solutions."

> "Again traffic, and also the graffiti that is constantly around this area. This gives a very bad impression to people looking to move their business here."

> "Cheaper areas drawing away established businesses."

> "Not doing something about the general appearance of the area – it could easily backslide and become quite undesirable."

> "Residence of the surrounding areas pushing the relocation of plants away from the area."

> "The costs of environmental management are escalating. Compliance costs for discharge are escalating and businesses may chose to ignore their responsibilities. Businesses are choosing to import and supply, rather than manufacture because it is cost prohibitive to do so."

> "It's ugly with a real lack of decent places for staff to go for lunch etc. which is a turn-off for potential hires."

> "Parking and traffic issues."

Responses were coded into logical groups to provide quantification of these comments. Many respondents' comments included several different components; each was coded separately to show the weight of support for each and is included in the table below.

Table 3-6: Issues and Threats for the Penrose-Te Papapa business precinct (%)

	Share Of Sample (n=328)
Traffic/roading congestion/narrow roads	35
Competition from other areas/decline as a prime industrial area/businesses moving out	9
Crime (break-ins and graffiti)	9
Improve the appearance of the area (so it does not look run down/cheap/unattractive)	8
Poor planning (residential zoning moving in on industrial areas limiting their growth)	8
Ease of access to and from the motorways	4
Regulatory compliance/business costs	3
Pollution (from heavy industry/trucks/rubbish)	3
Shortage of parking	3
Rents too high/cost of land/rates	3
Did not answer	20
Don't know/not applicable	6
Other	4

Base: All respondents (n=328). Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

Traffic and roading is by far the biggest concern with over a third (35 percent) of responses mentioning *traffic/roading congestion/narrow roads*.

Analysis by industry sector and employee number showed results generally consistent with the overall sample. However, respondents from the *wholesale trade* industry sector are more likely to comment on:

- *Traffic/roading congestion/narrow roads* (53 percent compared to 35 percent of the total sample); and
- *Ease of access to and from the motorways* (13 percent compared to 4 percent of the total sample).

4. Issues for Businesses in the Penrose - Te Papapa Business Precinct

4.1. Public transport provision

All respondents were asked if the provision of public transport in the Penrose-Te Papapa precinct meets the needs of their business.

Table 4-1: Does the provision of public transport meet the needs of your business (%)

	Share Of Sample (n=328)
Yes	53 (38)
No	34 (31)
Don't Know	13 (31)

Base: All respondents (n=328). Note: The option to answer *don't know* was added, due to respondent feedback, after the survey had been in the field for approximately ten days. the percentage in brackets denotes the results after the option was added (n=127)whilst the unbracketed figure represents the percentage of total responses (n=328)

One third of all respondents (31 percent) indicate that the provision of public transport in the area does not meet their need.

Analysis of the data from the total sample indicates that respondents that have 20-49 employees (48 percent) and more than 100 employees (51 percent) are significantly more likely to state that the provision of public transport does not meet the needs of their business (compared to 34 percent from the total sample).

Analysis by industry sector shows similar results to the overall sample.

Respondents who answered "No" to whether public transport meets the needs of their business were then asked to explain why. Analysis of these comments identifies the lack of public transport from/to some areas and the need for more train access as concerns about the provision of public transport for Penrose-Te Papapa. Comments made by respondents include:

> "Access to rail is poor and unsafe."
>
> "Need train access."
>
> "Staff and even ourselves could well advantage from decent train service. The tracks are there and being improved. It needs to be frequent stopping points as not everyone wants to walk 2km off the train."

> "There are no direct links from outlying areas in the Auckland region. People from West Auckland or the North Shore have to go to the central city first. This causes an increase in cost and time. This has limited our ability to attract some potential employees."

> "Staff members need to catch 3-4 different buses etc. to get to work from some suburbs."

> "There is no service from where our staff lives. The fastest anybody could get here using public transport would be two hours."

Some respondents commented on the frequency of public transport services to and from the area as well as commenting on other factors. Selected quotes are shown below:

> "Greater frequency and better access to cross city services would be helpful, as would development of the rail service."

> "Lack of bus frequency, traffic in general crowded, no trains (But is being addressed)."

> "Outside of normal 9-5 hours the service is limited, but even if the trains ran longer hours, the security at the station would make most hesitate to go to the station alone."

> "Proximity of business to stations/bus stops."

> "Road is the only practical option at this stage."

> "Staff use trains and it is some distance to the Penrose Station so they need to be picked up and dropped off each day – buses are no good for people trying to go to Manurewa."

> "Nominal services – does not suit shift workers."

The responses to this question were coded into logical groups for analysis. Many respondents' comments included several different components; each was coded separately to show the weight of support for each and is included in the table below.

Table 4-2: Why the provision of public transport does not meet the needs of your business (%)

	Share Of Sample (n=112)
Need more train access	26
No public transport access from/to some areas (e.g. East and West Auckland)	21
Infrequent public transport service	18
There is no public transport services close to our business	17
Need more direct access in/out of the area (can require 2-3 transfers from/to some areas)	14
Public transport system needs to be made faster (too slow)	10
Need more bus access	6
Public transport needs to run for longer hours (later at night/earlier in the morning)	5
Public transport is not needed	4
Don't feel safe waiting for public transport	4
Customers can only access our business through private transport	3
Did not answer	5
Other	4

Base: All respondents (n=112). Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

A quarter (26 percent) of comments from respondents who were offered this question stated the Penrose-Te Papapa precinct *needs more train access*. A further 21 percent commented that there is *no public transport access to/from some areas (e.g. East and West Auckland)*. Other frequently mentioned comments include:

- *Infrequent public transport* (18 percent);
- *There is no public transport services close to our business* (17 percent);
- *Need more direct access in/out of the area (can require 2-3 transfers from/to some areas)* (14 percent); and
- *Public transport system needs to be made faster (too slow)* (10 percent).

4.2. Availability of parking

Respondents were then asked if there was sufficient parking available for their business.

Table 4-3: Is their sufficient parking available for your business (%)

	Share Of Sample (n=328)
Yes	76
No	24

Base: All respondents (n=328).

Results were similar across industry sectors. Smaller organisations were more likely to report that they had sufficient parking (90 percent, compared with 76 percent of the total sample). Larger businesses of 100 or more employees were the least likely to report that they had sufficient parking (66 percent, compared with 76 percent of the total sample).

4.3. Car parks on site

Respondents were asked how many car parks their business has on site.

Table 4-4: Number of car parks on site (%)

	Share Of Sample (n=328)
1-5	15
6-10	30
11-20	23
21-50	19
51-100	8
101-150	1
151-200	1
200+	1
Plus Spare/vacant section	<1
Did not answer question	2

Base: All respondents (n=328).

Analysis of results by industry sector reveals results that are broadly consistent with the overall sample.

The amount of car parks is broadly reflective of the number of employees an organisation has. For example, 44 percent of businesses with 1-5 employees have 1-5 car parks on site (significantly more than 15 percent for the overall sample) and 34 percent of businesses with more than 100 employees have 51-100 car parks (significantly more than 8 percent for the overall sample).

4.4. Visitor car parks on Site

Respondents were asked how many of these car parks are visitor car parks.

Table 4-5: Number of visitor car parks on site (%)

	Share Of Sample (n=328)
1-5	61
6-10	17
11-20	6
21-50	1
51+	1
We have no visitor car parks	9
Combined visitor/staff parks	<1
Overflow parking on spare/vacant section	<1
Did not answer question/Blank	4

Base: All respondents (n=328).

Analysis of results by industry sector reveals results that are broadly consistent with the overall sample.

There is a logical progression in available visitor car parks as the size of a respondent's organisation increases. For example, 20 percent of businesses with more than 100 people have between 11-20 visitor car parks (significantly more than 6 percent for the overall sample).

4.5. Staff car parks on Site

Respondents were asked how many of their car parks are staff car parks.

Table 4-6: Number of staff car parks on site (%)

	Share Of Sample (n=328)
1-5	29
6-10	23
11-20	15
21-50	14
51+	7
Did not answer question/Blank/	6
We have no staff car parks	5
Other	1

Base: All respondents (n=328).

Analysis of results by industry sector reveals results that are broadly consistent with the overall sample.

Again, there is a clear logical progression with the number of staff car parks reflecting the size of a respondent's organisation. For example, 49 percent of businesses with more than 100 people have more than 51 staff car parks (significantly more than 7 percent for the overall sample).

4.6. Transport Issues

All respondents were asked to indicate any major transport issues for their business.

Q24. Which of the following are major transport issues for your business?

- Parking availability
- Accessibility of motorways
- Freedom of vehicle and freight movement within the industrial area
- Traffic congestion on surrounding roads
- Regional connections
- Other (please specify)

Table 4-7: Major transport issues for business (%)

	Share Of Sample (n=328)
Traffic congestion on surrounding roads	84
Accessibility of motorways	63
Freedom of vehicle and freight movement within the industrial area	55
Parking availability	45
Regional connections	32

Base: All respondents (n=328). Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

Eighty-four percent of respondents stated that *traffic congestion on surrounding roads* was a major issue for their business and 63 percent said that *accessibility of motorways* was an issue for their business.

Analysis by industry sector and employee numbers yield results consistent with the total sample. Notable differences include:

- Respondents from the *construction* industry sector are more likely to identify *accessibility of motorways* as a transport issue for their business (82 percent, compared to 63 percent of the total sample);
- Respondents from the *wholesale* industry sector are more likely to identify *freedom of vehicle and freight movement within the industrial area* as a transport issue for their business (72 percent, compared with 55 percent of the total sample);
- Respondents from the *manufacturing* industry sector are less likely to identify *parking availability* as a transport issue for their business (34 percent, compared to 45 percent of the total sample).

4.7. Recreational facilities

Respondents were asked if there are sufficient recreational or other facilities in the precinct for employee use.

Table 4-8: Is their sufficient recreational/other facilities available for your staff (%)

	Share Of Sample (n=328)
Yes	43 (29)
No	39 (28)
Don't know	18 (43)

Base: All respondents (n=328). Note: A decision to add the option to answer "Don't Know" was added after the survey was in the field due to feedback from some respondents, the percentage in brackets denotes the percentage of don't knows after the option was added (n=127)whilst the unbracketed figure represents the percentage of total responses (n=328)

Analysis after the option to answer *don't know* was added indicates that 43 percent of respondents *don't know* if there are sufficient recreational facilities available for their staff whilst 29 percent stated that there were sufficient recreational facilities.

Further analysis by employee numbers and industry type reveals similar results to the overall sample. However, respondents from organisations with 20-49 employees are more likely to report that there were sufficient recreational and other facilities available (60 percent, compared with 43 percent of the overall sample).

4.8. Recreational facilities needed

All respondents were then asked what additional recreational or other facilities are needed. Forty-seven percent of the sample responded to this question.

Responses were analysed and several themes were identified. Many respondents commented on the need for more parks, green areas and open areas within the Penrose-Te Papapa business precinct. Selected comments are included:

> "Lack of local parks, the area has a very industrial feel and is not welcoming. It's a drive to any park for a quick run or break during the day. The development of the Penrose area appears to have not taken this into consideration for the number of people who work in the area and the balance is out."

> "A few parks to make use of the Onehunga/Te Papapa waterfront would be beneficial."

> "A nice park close by so our staff can exercise or go to lunch without traffic fumes or noise."

> Green areas with trees that would be good for a walk at lunchtime as a refreshing break from the work environment."

> "Green open space – more parks for leisure activities/picnics etc."

A number of respondents also commented on the need for more restaurants and cafes in the area as well as making a variety of other suggestions. Some comments include:

> "Cafes, nice meeting areas outside the office, good eating establishments."

> "Child care facilities would be a good thing."

> "Indoor sports (squash etc.)."

> "Decent restaurants and convenience stores."

> "Small retail and food areas that become a hub of activity during the day providing a meeting place, or resting place or light recreational facilities for workers looking to get out and active during their lunchtime. Would provide grassed areas, trees for shade, and a variety of seating/tables."

Responses to this question were coded into logical groups for analysis. Many respondents' comments included several different components; each was coded separately to show the weight of support for each and is included in the table below.

Table 4-9: What other recreational/other facilities are needed (%)

	Share Of Sample (n=153)
Parks, open spaces, walking areas, pathways, green areas	37 (17)
Restaurants/Cafes/lunchbars/foodcourt	14 (7)
Don't know	9 (4)
Not applicable	8 (4)
Child care facilities	7 (3)
Fitness centre/gym	6 (3)
Shops	5 (2)
Maintain/improve existing facilities in the area	3 (2)
Seats/shelters/tables	3 (1)
Beaches	3 (1)
None/nothing	15 (7)

Base: All respondents (n=153). The percentage in brackets reflects the proportion of the entire sample of n=328. Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

All respondents were asked to comment on what additional recreational or other facilities are needed in the Penrose-Te Papapa precinct. Over half the total sample (60 percent) did not answer this question or said nothing, whilst over a third (37 percent) of respondents who did answer this question mentioned the need for *parks, open spaces, walking areas, pathways, green areas* (this represents 17 percent of the total sample). A further 14 percent of responses expressed a need for more *restaurants/cafes/lunchbars/foodcourts* (this represents 7 percent of the total sample).

5. Local and External Business Linkages

5.1. Business connections within Penrose-Te Papapa business precinct.

Respondents were asked to describe their business connections to other businesses in the Penrose-Te Papapa business precinct. This was an open-response question.

There was a wide variety of responses to this question. A strong sense of business to business networking is evident amongst responses with:

- Most businesses have either supply or demand linkages in the area
- Indicating of preference to use local suppliers is evident
- Evidence of some business clustering is apparent
- Many business in the area operate at a national level although their local connections are also important

A selection of comments illustrating the range of responses is shown below:

> "Approximately 50% of our client base is located within a 5-10km radius, which is important, the other clients find the location handy. Suppliers are handy too."

> "A lot of activity is done with local suppliers and this is one of the reasons we're here."

> "As an engineering consumable supply company, we now have very few customers left in Penrose-Te Papapa, but those left do support us."

> "Endeavour to use local suppliers and trades people for supply of all goods and services when applicable."

> "Have some clients in the area, but not a major consideration."

> "Many of our suppliers and customers are within easy access of the location, one of the key advantages of the area."

> "No connection. Our markets are more in the Mt. Wellington area. We are moving for this specific reason to be closer to our market and the southern motorway connection."

> "None specifically in the immediate area, but central location makes access to our main suppliers who mostly are located in the peripheral suburbs."

"Our clients are nationwide, most business is received by fax or e-mail. Couriers are extremely good but often are delayed by traffic congestion."

"Try to use local businesses for supply of all goods and services that can be performed within the area. Important for quick response to supply needs."

"Very few connections. They are not important to me."

"We are currently in the middle of 5-6 companies which in one way or another be considered competitors. This also means it has attracted suppliers so works well for all. Our suppliers gain from this as do we."

"We chose to be here because of our proximity to road networks, ease of moving about. Our clients are all over Auckland."

"We try to do business with companies in the area where possible but there are no organised networking facilities like Manukau City for instance."

"Where ever possible we will favour a local supplier."

The responses to this question were coded into logical groups for analysis. Many respondents' comments included several different components; each was coded separately to show the weight of support for each and is included in the table below.

Table 5-1: Business Connections within the Penrose-Te Papapa business precinct (%)

	Share Of Sample (n=328)
Have some/few customers/suppliers in the area	30
We have suppliers in the area	27
We have customers/clients in the area	19
Customers/suppliers throughout the Auckland region	8
No business relationships in the area	5
We try our best to do business with companies in the area when possible	4
Unspecified business relationship in the area	4
Response identifies a relationship with specific supplier/client/organisations	3
We have customers/clients throughout the country	3
Don't know/Not applicable	3
Did not answer	9

Base: All respondents (n=328). Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

Further analysis shows that respondents from the *wholesale trade* sector are significantly more likely to mention they *have customers/clients throughout the country* compared to other sectors (13 percent, compared with 3 percent from the overall sample).

Those most likely to *have customers/clients across the Auckland region* include respondents from organisations with more than 100 employees (17 percent, compared to 8 percent from the overall sample).

5.2. Business connections across Auckland and throughout New Zealand.

Respondents were then asked to describe their business connections to other businesses within Auckland and throughout New Zealand. This was an open-response question.

Again there was a wide variety of responses to this question by respondents. Responses indicate that the majority of businesses have suppliers and customers across the Auckland region, with some extending their linkages across the North Island and throughout New Zealand. A selection of comments that reflects this variety is shown below:

> "65% of our business is in the Auckland area. Courier and trucking companies are within easy distance. Close links to the airport for our importing of raw materials able to quickly pick up if necessary."

> "Majority of our customers and suppliers are within the Auckland region."

> "Most clients and suppliers exist in the broader area. We send a lot of staff to their sites to perform work for long periods of time."

> "Most key suppliers and customers are based in the Auckland region, with several others in the Upper North Island region."

> "Our customer base spreads between Albany and Pukekohe mainly, with a little throughout the North Island. All supplies are sourced locally in the main and are readily available."

> "They are wide and varied and based on the most appropriate supplier as opposed to where they are located."

The responses to this question were coded into logical groups for analysis. Many respondents' comments included several different components; each was coded separately to show the weight of support for each and is included in the table below.

Table 5-2: Business Connections outside the Penrose-Te Papapa business precinct (%)

	Share Of Sample (n=328)
Most of our customers/clients are based in the Auckland region	26
Most of our customers/clients are based throughout New Zealand	24
Most of our suppliers are based in the Auckland region	13
Response identifies generic suppliers/customers organisation	7
Many of our suppliers/customers are based outside New Zealand	7
Our business operates nationally from different locations	7
Most of our suppliers are based throughout New Zealand	5
Response identifies specific suppliers/customers organisation	4
Most of our suppliers/customers are in the area/we have only have a few links with businesses outside the area	4
All of our suppliers/customers are in the area	3
Did not answer	22
Other	5

Base: All respondents (n=328). Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

Analysis based on employee numbers yields similar results to the overall sample. Respondents from organisations with over 100 employees are significantly more likely to mention that *our business operates nationally from many different locations* (20 percent, compared to 7 percent in the overall sample).

Respondents from the *wholesale trade* industry sector are significantly more likely to say:

- *Most of our customers/clients are based throughout New Zealand* (47 percent, compared to 24 percent of the total sample); and
- *Many of our suppliers/customers are based outside New Zealand* (19 percent, compared to 7 percent of the total sample).

5.3. Importing/Exporting

Respondents were asked if their business imported and exported and if so, how much.

The majority of businesses (61 percent) import or export some goods and services. Of those businesses that export, the majority (68 percent) export less than 10 percent of their total output whilst the percentage of input that is imported appears to be spread across a wider range.

Table 5-3: Business' Propensity to Import and Export

	Share of Sample (n=328)
Import and Export	33
Import Only	21
Export Only	7
Neither	39

Base: All respondents (n=328).

Analysis of results by employee numbers reveals results consistent with the overall sample. However, respondents from organisations with 50-99 employees are significantly more likely (51 percent) whilst organisations with 1-5 employees are significantly less likely (23 percent) to import and export, compared with 33 percent from the overall sample.

Respondents from the Wholesale (56 percent) and Manufacturing (51 percent) industry sectors are significantly more likely to both import and export than the overall sample (33 percent). Additionally, respondents from the Transportation and Warehousing industry sector are significantly more likely to neither import nor export (68 percent, compared with 39 percent of the overall sample). Respondents from the Construction sector are slightly less likely to both import and export than the total sample (18 percent, compared with 33 percent of the overall sample).

<u>Importing</u>

Over half (54 percent) of respondents surveyed said that their organisation imports from overseas.

Significantly more respondents from the *wholesale* (88 percent) and *manufacturing* (67 percent) industry sectors import goods from overseas (compared with 54 percent of the total sample). The *transportation, postal and warehousing* industry sector are significantly less likely to import (32 percent, compared with 54 percent of the total sample).

Analysis by employee numbers show results that are consistent with the total sample.

Exporting

Three out of five (59 percent) respondents report that their organisation does not export any of their output. Significantly more *manufacturing* (61 percent) and *wholesale* (59 percent) industry sector respondent's export (compared to 40 percent of the total sample). Conversely, respondents from the *transportation, postal and warehousing* industry sector are less likely to export (77 percent, not exporting compared with 59 percent of the total sample).

Table 5-4: Percentage imported (%)

Percentage	Share of Sample (n=177)
1-10	11
11-20	4
21-40	10
41-60	7
61-80	6
81+	8
Blank/Did not answer	54

Base: All respondents (n=177).

The respondents who reported that their organisation imported were asked what percentage of their input is imported. Eleven percent stated they imported *1-10* percent of their input and a further 10 percent imported *21-40* percent of their input. Over half (54 percent) of respondents did not answer the question.

Table 5-5: Percentage exported (%)

Percentage	Share of Sample (n=132)
1-10	68
11-20	11
21-40	8
41-60	5
61-80	-
81+	-
Blank/Did not answer	8

Base: All respondents (n=132).

Respondents who answered that they export were asked what percentage of their output is exported. Over two-thirds (68 percent) of respondents indicate that they export *1-10* percent of their output whilst 11 percent export *11-20* percent. No respondents export more than 61 percent of their output.

Analysis by industry sector and employee numbers shows results consistent with the overall sample.

5.4. Partnership arrangements with other companies

Respondents were asked if their business maintained a partnership arrangement with other companies.

Table 5-6: Does your business maintain partnership arrangements with other companies (%)

	Share of Sample (n=328)
Nationally	
Yes	48
No	50
Blank/Did not answer	2
Internationally	
Yes	39
No	58
Blank/Did not answer	3

Base: All respondents (n=328).

Fifty percent of respondents indicate that they do not maintain partnership arrangements with other companies in New Zealand, while 58 percent say that they do not maintain partnership arrangements with other companies internationally.

Analysis by industry sector and employee numbers yields similar results to the overall sample.

6. Expansion Plans

The majority of respondents have demonstrated a positive outlook regarding the future of their businesses in the Penrose-Te Papapa business precinct with almost three out of five (59 percent) stating that their business intends to expand over the next five years. Further analysis indicates that more than a quarter (27 percent) of respondents predict they will be employing more staff in five years time than they are currently. To support the notion that businesses in Penrose-Te Papapa are confident that they will expand, analysis suggests that 45 percent of respondents have increased their turnover over the last five years to some extent.

However, respondents appear less clear about whether their expansion will take place in their current premises (35 percent answering 'yes', 35 percent answering 'no' and 30 percent who 'don't know').

6.1. Planned expansion by respondent's organisation

Respondents were asked whether their business intends to expand in the next five years.

Table 6-1: Does your business plan to expand in the next five years (%)

	Share Of Sample (n=328)
Yes	67 (59)
No	28 (29)
Don't Know	5 (12)

Base: All respondents (n=328). Note: The option to answer *don't know* was added, due to respondent feedback, after the survey had been in the field for approximately ten days. The percentage in brackets denotes results after the option was added (n=127) whilst the unbracketed figure represents the percentage of total responses (n=328)

Two-thirds (67 percent) of respondents said their business intends to expand in the next five years, however this reduces to 59 percent when the data is analysed after the option to answer *don't know* was added. After *don't know* was added 12 percent of respondents chose this option (this represents 5 percent of the total sample).

Respondents from organisations with 20-49 employees are significantly more likely to state they plan on expanding in the next five years (89 percent, compared with 67 percent of the total sample), whilst respondents with 1-5 employees in their organisation are significantly less likely to plan on expanding (46 percent answer *no*, compared with 28 percent of the total sample).

Further analysis of this question by respondent's answer to whether the availability of suitable land is an issue for their business indicates that 67 percent of respondents who plan on expanding their business state that the availability of land in their area is not an issue whilst 30 percent say that it is.

Analysis by industry sector yields similar results to the overall sample.

Respondents who answered "Yes" to whether their business intends to expand in the next five years were then asked if the expansion would occur at their businesses current site. Two hundred and seventeen respondents answered this question.

Table 6-2: Will expansion be at your current site (%)

	Share Of Sample (n=217)
No	45 (35)
Yes	44 (35)
Don't Know	11(30)

Base: All respondents (n=217). Note: The option to answer *don't know* was added, due to respondent feedback, after the survey had been in the field for approximately ten days. The percentage in brackets denotes the results after the option was added (n=75) whilst the unbracketed figure represents the percentage of total responses (n=217)

After the option to answer *don't know* was added 35 percent of respondents to this question reported that future expansion will be at their current site. A further 35 percent reported that it would not be at their current site and 30 percent reported that they *don't know* where future expansion would take place.

6.2. Number of Employees

Respondents were asked how many people they expect to employ in five years time.

Table 6-3: Expected number of employees in five years time (%)

	Share of Sample (n=328)
0	2
1-5	17
6-9	13
10-19	24
20-49	19
50-99	10
100+	12
Did not answer	3

Base: All respondents (n=328).

Analysis was undertaken comparing the number of employees respondents employ currently (see section 2.6) and how many they expect to employ in five years time.

Table 6-4: Expected growth in employee numbers over five years (%)

Number of Employees now	Number of Employees in five years						
	0	1-5	6-9	10-19	20-49	50-99	100+
0	1	0	0	0	0	0	0
1-5	1	14	6	<1	0	0	0
6-9	0	2	6	8	0	<1	<1
10-19	0	1	1	15	6	0	0
20-49	0	<1	<1	1	12	3	0
50-99	1	0	<1	<1	1	6	3
100+	0	<1	0	<1	<1	1	9

Base: Percentage based on all respondents (n=317).

Note: This analysis can only take into account change in employee numbers between groups of numbers (i.e. from 1-5 to 6-9 employees) and cannot take into account any change within a group (i.e. from 2 employees to 4 employees). Therefore these results should be considered indicative only.

The analysis indicates that 63 percent of respondents predict that they will employ the same number of employees in five years that they employ currently. Twenty-seven percent of respondents indicate that they expect to employ more employees in five years than they do now and 10 percent expect to employ fewer employees in five years than they employ currently.

6.3. Turnover

Respondents were asked what their turnover was five years ago..

Table 6-5: Annual Turnover 5 years ago (%)

New Zealand $	Share of Sample (n=328)
Under $100,000	2 (2)
$100,000 – $250,000	5 (5)
$250,000 - $500,000	7 (6)
$500,000 - $1 million	13 (10)
$1 million - $2 million	12 (17)
$2 million - $5 million	17 (12)
$5 million - $10 million	10 (7)
$10 million and above	16 (10)
Don't know	3 (6)
I prefer not to answer this question	9 (22)
Blank/Did not answer	6 (3)

Base: All respondents (n=328). Note: A decision to add the options to answer "Don't Know" and "I prefer not to answer this question" was added after the survey was in the field due to feedback from some respondents, the percentage in brackets denotes the results after the option was added (n=127)whilst the unbracketed figure represents the percentage of total responses (n= 328)

Analysis was undertaken comparing turnover from five years ago to current turnover (See Section 2.4).

Table 6-6: Growth in Turnover over the last five years (%)

Turnover 5 years ago	Turnover now							
	<$100k	$100k-$250k	$250k-$500k	$500k-$1m	$1m-$2m	$2m-$5m	$5m-$10m	$10m+
<$100k	1	0	0	0	<1	<1	<1	1
$100k-$250k	<1	2	3	<1	0	<1	0	0
$250k-$500k	0	0	2	4	2	1	0	0
$500k-$1m	0	0	1	5	5	4	<1	<1
$1m-$2m	0	0	<1	1	7	6	<1	<1
$2m-$5m	0	0	0	0	2	10	7	1
$5m-$10m	0	0	0	0	0	<1	4	8
$10m+	<1	0	0	0	0	0	0	19

Base: Percentage based on all respondents (n=269).

Note: This analysis can only take into account change in turnover between groups of numbers (i.e. from a turnover of $100k-$250k to $250k-$500k) and cannot take into account any change within a group (i.e. from a turnover of $1.3m to $1.7m). Therefore these results should be considered indicative only.

The analysis indicates that half (50 percent) of respondents had the same turnover now as they did five years ago. Forty-five percent of respondents indicate that their turnover has increased over the last five years and 5 percent report that their turnover has decreased from five years ago.

7. Factors Influencing Current Business Location

7.1. How cost of land affects location decision.

Respondents were asked to what degree the cost of land today affects their location decision.

Table 7-1: Affect of cost of land today on location decision (%)

	Share Of Sample (n=328)
Not at all	20
A Little	13
Somewhat	13
Has an impact	32
Largely impacts	15
Not applicable	7

Base: All respondents (n=328).

Sixty percent of respondents indicate there is at least some impact of cost of land on location decisions.

Analysis of responses by employee numbers and industry sector shows results consistent with those from the overall sample.

Respondents were offered an opportunity to comment further on the effect of the cost of land today on their business location. Many comments focussed on rising rent costs and the benefits of their location. A selection of respondent's comments is included below:

> "At present we are on reasonable rent that is affordable, however a recent review by the landlord has resulted in a request to almost double the current amount. Due to the financial climate this increase has been shelved for 6 months however a move to a cheaper area may be a requirement in the near future."

> "Cost of land influences rent which does affect our location decision."

> "I think the rates are too high and effort in reducing Council waste and focussing Council's responsibilities will help all businesses."

> "It would be good to have a larger workshop, but the value of land and buildings makes this difficult to justify."

"Our length of occupancy has made the land cost irrelevant and the cost of relocation is greater than the cash benefit of selling."

"Would prefer to own premises to insulate against rising lease costs but values are too high. Am concerned lease costs for area could necessitate relocation out of area."

Responses were coded into logical groups for quantification and analysis in the table below.

Table 7-2: Affect of cost of land of location decision today- comments (%)

	Share Of Sample (n=82)
Rental costs are too high	26 (6)
Location decision based on benefits of the location	24 (6)
Location decision is based on rent/rates	13 (3)
Land price/value out of control	10 (2)
We have always been located here	10 (2)
Rates are too high	9 (2)
Land cost does not affect our location decision	6 (2)
The location decision is not ours to make	5 (1)
Other	6 (2)

Base: All respondents (n=82). The percentage in brackets reflects the proportion of the entire sample of n=328. Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

7.2. How cost of land affected location decision five years ago.

Respondents were asked to what degree did the cost of land five years ago affected their location decision.

Table 7-3: Affect of cost of land of location decision 5 years ago (%)

	Share Of Sample (n=328)
Not at all	33
A Little	13
Somewhat	16
Had an impact	18
Largely impacted	9
Not applicable	11

Base: All respondents (n=328).

Analysis of responses by employee numbers and industry sector shows results consistent with those from the overall sample.

Respondents were offered an opportunity to comment further on the affect of the cost of land 5 years ago on their business location. Respondents who commented were most likely to comment that they have been in the area for longer than five years whilst others commented on a range of factors including the benefits of the location, rent costs and the cost of land. Selected comments by respondents are shown below:

> "Not so much the cost of land but more the locality."

> "We have been on this site for somewhere around 50 years; however, as we look forward and in consideration of the increasing land value it will be hard to justify staying on this site."

> "Lease costs were very low."

> "Rent is affordable compared to closer to CBD."

> "I moved from Glen Innes to Penrose because the premises, rental costs and services were right for my business."

> "The property was cheap when purchased."

All responses were coded into logical groups for analysis. Many respondents' comments included several different; each was coded separately to show the weight of support for each and is included in the table below.

Table 7-4: Affect of cost of land of location decision 5 years ago- comments (%)

	Share Of Sample (n=63)
We have been in this location for more than five years	35 (7)
The cost of land was the reason we located here	16 (3)
Rent is more affordable here than in other locations	11 (2)
Not so much the cost as the benefits of the location to our business	11 (2)
The rent level was the reason we located here	10 (2)
We were not in this location five years ago	6 (1)
Central location	5 (1)
Industrial zoning	3 (1)
Other	3 (1)

Base: All respondents (n=63). The percentage in brackets reflects the proportion of the entire sample of n=328. Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

7.3. Reasons for relocating to Penrose-Te Papapa

Respondents who have been located in the Penrose-Te Papapa business precinct for less than five years were offered the opportunity to comment on the reason why they decided to locate there.

An analysis of responses identifies Penrose-Te Papapa as being a well priced location and the availability of a suitable building/location as being the main reasons why respondents relocated to the area. A selection of the comments made by respondents is included below:

> "Availability of land at a competitive price."
>
> "Cheaper commercial lease space."
>
> "Cheaper rent."
>
> "Availability of suitable affordable premises in a desired location."
>
> "Free rent and have a base closer to Mt Smart."
>
> "Location of suitable building."
>
> "Suitable premises and more appropriate location."

A variety of other reasons were given for relocating to Penrose-Te Papapa, including access to the motorway, being close to customers and employees, being close to the CBD and availability of bigger premises. Selected comments by respondents have been included below:

> "Proximity to motorway on-ramps, less than 20 minutes from CBD."
>
> "Bigger premises, access to motorways."
>
> "Close to customers and suppliers."
>
> "Close to major customers and our employees at the time."
>
> "Proximity to airport and the city."
>
> "Centrally located with good access to motorways."

Responses were coded into logical groups for quantification and analysis in the table below.

Table 7-5: Reason for location/relocation to Penrose-Te Papapa business precinct (%)

	Share of Sample (n=50)
Well priced location	24
Availability of suitable building/location	22
Wanted to be in a commercial/industrial area	12
Motorway Access	12
Bigger premises	12
Business already established/located here	10
Close to the CBD	6
Close to customers and employees	4
Our old lease was terminated	4
Did not answer	16

Base: All respondents (n=50). Note: Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

Cost and availability of suitable site/premises dominate while motorway access is the most mentioned location characteristic.

7.4. Availability of suitable land.

All respondents were asked whether the availability of suitable land is an issue for their business.

Table 7-6: Availability of suitable land (%)

	Share Of Sample (n=328)
No	72 (71)
Yes	25 (22)
Don't know	3 (7)

Base: All respondents (n=328). Note: The option to answer *don't know* was added, due to respondent feedback, after the survey had been in the field for approximately ten days. The percentage in brackets denotes the percentage of don't knows after the option was added (n=128) whilst the unbracketed figure represents the percentage of total responses (n=328)

Analysis by industry sector and number of employees yields results generally consistent with the overall sample. However, respondents from the *transportation, postal and warehousing* industry sector were significantly more likely to report that the availability of suitable land was an issue for their business (58 percent compared to 25 percent of the overall sample), along with 41 percent of respondents from organisations with 50-99 employees said the availability of suitable land was an issue for their business (compared with 25 percent of the overall sample).

Respondents who reported that the availability of suitable land was an issue for their business were offered an opportunity to explain further. Eighty-two respondents took the opportunity to comment further.

An examination of respondent's comments indicated that the lack of suitable land and the difficulty involved in finding a suitable location are regarded as potential issues for business in the Penrose-Te Papapa business precinct. A selection of comments made by respondents about the difficulty to locate suitable land includes:

> "Currently there are no premises available which suit my business."
>
> "Our site is space constrained and suitability of land in the area for expansion presents challenges."
>
> "[It] took us five years to find a suitable piece of land on which to build."
>
> "We have expansion plans but finding it hard to locate bare land in the local area – probably forced to consider west/north or Manukau if expansion plans come to fruition."

Other aspects relating to land availability commented on by respondents include:

> "Difficult to plan growth with the land restriction."
>
> "It's not just land cost/availability." But also the ridiculous planning issues that cost tens of thousands just for rubber stamps."
>
> "We looked previously at expanding and could not."
>
> "There are very few sites that are large enough for us to expand here. We will require 2000m^2 warehouse and large yard for container unloading."
>
> "Most land is now unaffordable."
>
> "We were looking to relocate to new premises but [were] unable to find a suitable location, [we are] now looking to just expand on existing premise."

All responses were coded into logical groups for quantitative analysis. The results are included in the table below.

Table 7-7: Availability of suitable land- comments (%)

	Share Of Sample (n=82)
Not much land/suitable land/large properties available	23 (6)
Difficult to find a suitable location	22 (6)
Dependent on price	16 (4)
We would like a larger site	12 (3)
The need for future growth will dictate our needs	10 (2)
Land is too expensive	10 (2)
We have tried to expand before and could not due to land availability	6 (2)
Other	6 (2)
Did not answer	10 (2)

Base: All respondents (n=82). The percentage in brackets reflects the proportion of the entire sample of n=328. Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

7.5. Relocation plans.

Respondents were asked whether their business would consider relocating or leaving to another area in the next five years.

Table 7-8: Would you consider leaving or relocating to another area in the next five years (%)

	Share Of Sample (n=328)
No	48 (43)
Yes	44 (36)
Don't Know	8 (21)

Base: All respondents (n=328). Note: The option to answer *don't know* was added, due to respondent feedback, after the survey had been in the field for approximately ten days. The percentage in brackets denotes the results after the option was added (n=127) whilst the unbracketed figure represents the percentage of total responses (n=328)

Analysis of the total sample indicates that respondents from organisations with 1-5 employees are significantly less likely to consider leaving or relocating (29 percent, compared to 44 percent of the total sample) as are respondents from organisations with 20-49 employees (60 percent).

Analysis by industry sector yields results that are consistent with the overall sample.

Respondents who answered “Yes” to whether their business intends to relocate or leave the Penrose-Te Papapa precinct in the next five years, were asked which areas they would consider moving to. Some respondents replied to this question by stating their requirements for a future location rather than naming a specific location. Some of these verbatim comments have been included below:

> “A larger block with good traffic access/egress”
>
> “A site where the land area suits our business requirements if we cannot expand at our current location.”
>
> “An area with similar close proximity to services required and ensuring employee access to the location was appropriate.”
>
> “Could probably move our manufacturing facility overseas or buy in from contract manufacturers abroad.”
>
> “Depends on a number of factors including lease costs, customer base location and access to quality employees.”
>
> “Don’t want to move so would need a location that provides similar benefits.”
>
> “Auckland traffic issues are a detriment to doing business. We may be forced to look at satellite branches around Auckland and a cheaper main warehouse facility out of Auckland.”

All comments made by respondents were coded into logical groups for quantitative analysis. The results are included in the table below.

Table 7-9: Which areas would you consider relocating to in the next five years (%)

	Share Of Sample (n=144)
Mt Wellington/Penrose/Onehunga/Otahuhu/Ellerslie	26
East Tamaki	17
South Auckland (Takanini/Drury/Papakura)	14
Highbrook Industrial Estate	10
An area that is cheaper	6
Closer to the airport	5
A location that provides similar benefits/similar area	5
A larger location (area not specified)	4
Closer to the city	4
Central Auckland/City fringe	3
A place with good traffic access/better transport management	3
Avondale	3
Anywhere in the Auckland region	3
Undecided (it would depend on other factors)/Currently decided/unsure	10

Base: All respondents (n=144). Note: All comments mentioned by 3% or more respondents. Multiple responses were permitted for this question so table may total more than 100%.

7.6. Decision factors for current location

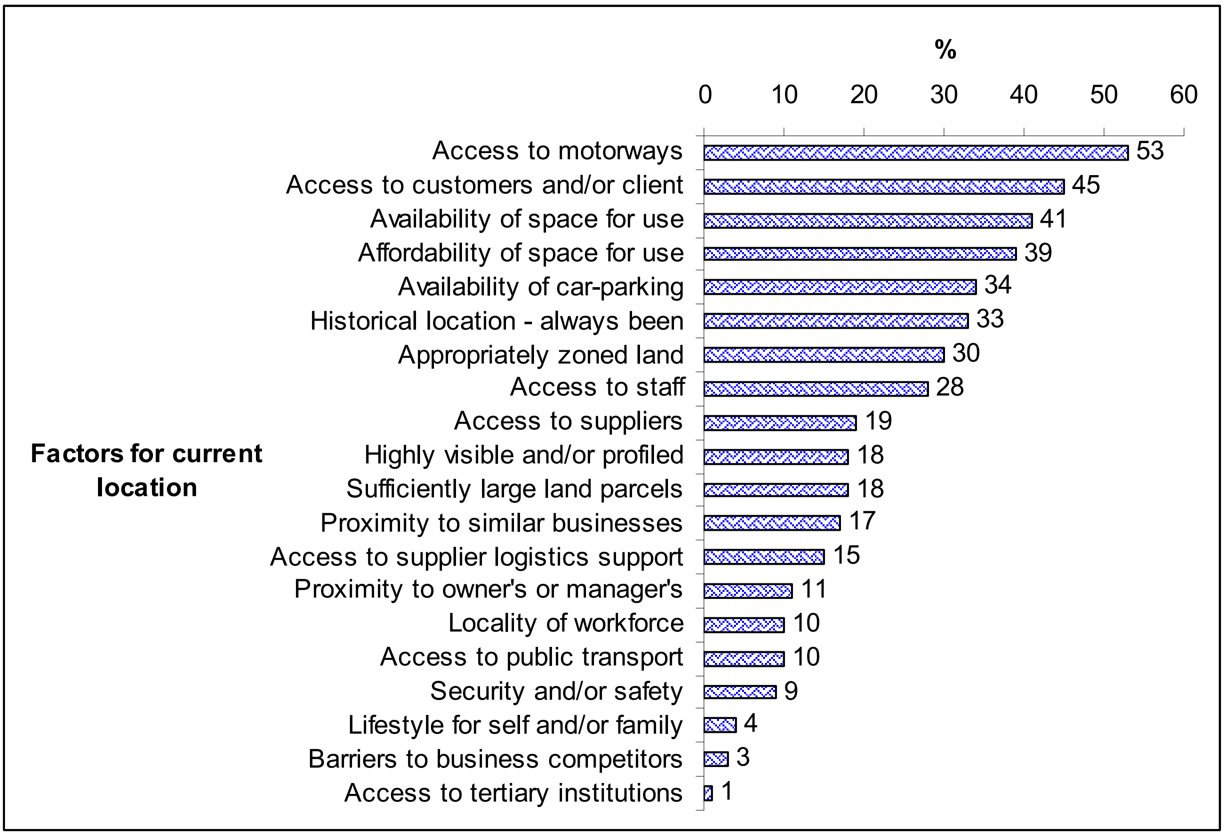
Respondents were asked to what degree their decision to move to their current location was influenced by a number of different factors. Respondents rate *access to motorways* and *access to customers and/or client base* as the most influential factors for their location decision.

Table 7-10: Decision factors for current location (%)

Factor	Share of Sample (n=328)				
	Very	Somewhat	Not at all	Don't know	No answer
Access to motorways	**53**	35	7	1	4
Access to customers and/or client base	**45**	35	15	1	4
Availability of space for use	41	**44**	8	1	6
Affordability of space for use	39	**44**	7	3	7
Availability of car-parking	34	**44**	17	1	4
Historical location – always been there	33	21	**37**	4	5
Appropriately zoned land	30	**33**	25	6	6
Access to staff	28	**48**	18	1	5
Access to suppliers	19	37	**38**	1	5
Highly visible and/or profiled location	18	30	**46**	2	4
Sufficiently large land parcels	18	29	**40**	5	8
Proximity to similar businesses	17	25	**51**	2	5
Access to supplier logistics support	15	**40**	37	2	6
Proximity to owner's or manager's home	11	24	**58**	3	4
Locality of workforce	10	**45**	36	2	7
Access to public transport	10	32	**50**	2	6
Security and/or safety	9	**41**	39	4	7
Lifestyle for self and/or family	4	14	**71**	4	7
Barriers to business competitors	3	11	**74**	5	7
Access to tertiary institutions and/or training facilities	1	8	**80**	4	7

Base: All respondents (n=328). Note: Red highlighting denotes most preferred choice. Factors have been ranked by results for "Very Influential"

Figure 7-1: Ranked "very influential" factors for current location (%)



7.7. Decision factors for future location

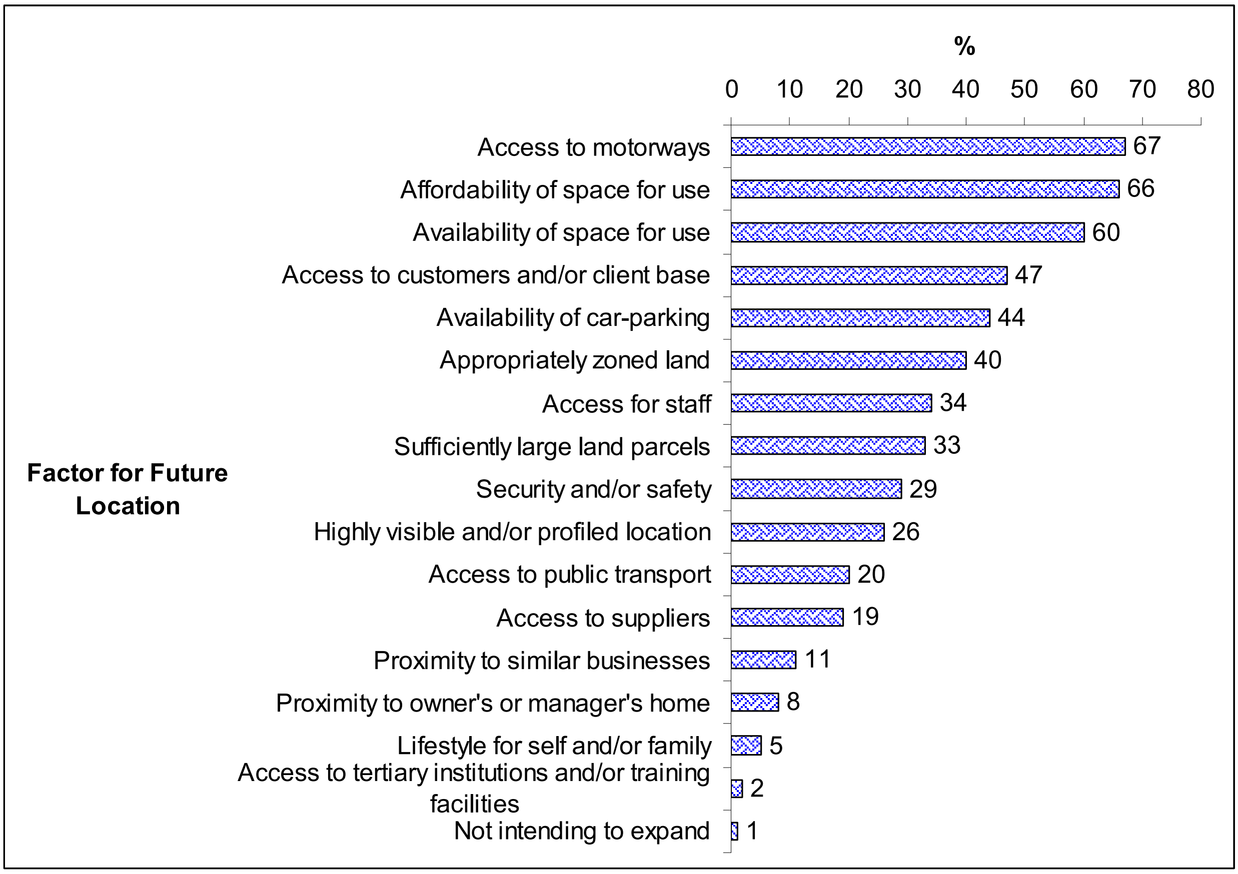
Businesses that intended to move or expand over the next five years were asked to what degree the following factors would influence their decision. Respondents rate *access to motorways*, *affordability of space for use* and *availability of space for use* as the most influential factors for their future location decision.

Table 7-11: Decision factors for future location (%)

Factor	Share of Sample (n=179)				
	Very	Somewhat	Not at all	Don't know	Blank
Access to motorways	**67**	23	7	1	2
Affordability of space for use	**66**	26	4	1	3
Availability of space for use	**60**	31	4	1	4
Access to customers and/or client base	**47**	38	10	1	4
Availability of car-parking	**44**	38	12	1	5
Appropriately zoned land	**40**	38	16	1	5
Access for staff	34	**44**	16	1	5
Sufficiently large land parcels	33	**34**	25	1	7
Security and/or safety	29	**44**	20	1	6
Highly visible and/or profiled location	26	31	**37**	2	4
Access to public transport	20	**41**	33	1	5
Access to suppliers	19	**40**	35	1	5
Proximity to similar businesses	11	31	**51**	2	5
Proximity to owner's or manager's home	8	25	**60**	2	5
Lifestyle for self and/or family	5	17	**69**	3	6
Access to tertiary institutions and/or training facilities	2	10	**78**	2	8
Not intending to expand	1	8	**42**	10	39

Base: All respondents (n=179). Note: red highlighting denotes most preferred choice. Factors have been ranked by results for "Very Influential"

Figure 7-1: Ranked "very influential" factors for future location (%)



8. Further Information and future involvement preferences by respondents

All respondents were asked if they would like to receive more information regarding the economic development of the Penrose-Te Papapa business precinct and whether they are interested in participating in a business association and focus groups that will help to address the issues of the precinct.

Q39. Would your business like to receive more information on economic development issues in the Penrose-Te Papapa business area or wider Auckland economy?
Q40. Would your business like to receive information electronically on economic development issues in the Penrose-Te Papapa business area or wider Auckland economy?
Q41. Would your business be interested in taking part in a business association?
Q42. Would your business like to take part in a focus group on issues facing businesses in the Penrose-Te Papapa business area?

Table 8-1: Further Information and Future Involvement Preferences (%)

	Share of Sample
	Yes
More Information on economic development	61 (n=201)
More information electronically	61 (n=198)
Take part in business association	31 (n=103)
Take part in focus group	22 (n=71)

Base: All respondents (n=328).

There is clearly a high level of interest in the future of Penrose-Te Papapa with 61 percent of respondents wanting to receive more information on economic development issues in the area. A further 61 percent of respondents say they want to receive that information electronically.

The interest in taking part in a business association or focus group is significantly lower amongst respondents but can still be regarded as a positive response as over 100 respondents indicate they would like to take part in a business association and 71 are interested in taking part in focus groups regarding the issues faced by the Penrose-Te Papapa business precinct.

9. Conclusion

The key findings of this research are:

<u>Nature of the Area</u>

- The Penrose-Te Papapa business precinct contains a wide range of businesses. The businesses surveyed are medium-large, with the majority of the sample employing 10 or more employees and having a turnover of greater than $1 million per year. The research also identified Penrose-Te Papapa as a stable location for business with over half of all respondents having been located in the area for more than ten years.
- A strong sense of business to business relationships is evident amongst businesses in the area with most businesses indicating they have either supply or demand linkages in the area.

<u>Key Attractors</u>

- Good access to the motorway and to the rest of Auckland was mentioned as an advantage of the area as well as Penrose-Te Papapa being in a central location and having easy access to and from the airport, port and railways.
- Respondents who have been located in the Penrose-Te Papapa business precinct for less than five years point to Penrose-Te Papapa being a well priced location and the availability of suitable buildings or location as the key attractors of the area.

<u>Vision for the Area</u>

- When asked to comment on their vision for the Penrose-Te Papapa business precinct respondents identified several key themes in describing their vision, including:
    - That it should be promoted as a strong business area, a hub or one stop supply area;
    - Improvements to the look and environment of the area;
    - Portraying an image of a modern, efficient, integrated and significant business park type area;
    - Traffic and roading improvements;
    - Provision of public transport; and
    - More recreational areas and green spaces.

Expansion

- Respondents indicated they are optimistic about the future of their business, more than half (59 percent) state that their business intends to expand over the next five years. Furthermore, twenty-seven percent of respondents predict that their business will employ more staff in five years time than they do currently.
- The majority of respondents demonstrated an interest in the future economic development plans for the area with three of five saying they would like to receive more information on economic development in the Penrose-Te Papapa or wider Auckland area.

Influential Factors on Location

- Access to motorways is regarded by respondents as being the most influential factor in decisions relating to their current and future locations. Other high ranking factors for both current and future location include:
  - Access to customers and/or clients;
  - Availability of space for use; and
  - Affordability of space for use.

Desired Improvements

Throughout this research, respondents have consistently commented on traffic and transport related issues as a not so positive aspect of the Penrose-Te Papapa business precinct.

- When asked what the disadvantages of the Penrose-Te Papapa area were, 43 percent commented that there was too much traffic congestion and a further 12 percent mentioned access into and out of the area.
- Traffic issues are also mentioned by respondents when outlining their desired improvements for the area. Twenty-two percent of respondents mention that traffic congestion should be improved whilst 15 percent comment on improving access to the motorways.
- Additionally, 35 percent of respondents regard traffic congestion and roading as an issue or threat to the Penrose-Te Papapa business precinct that if not resolved will affect the future business development of the area.
- Furthermore, respondents indicated their concern for congestion and roading issues when asked to select from a list the major transport issues for their business. Eighty-four percent of respondents selected traffic congestion on surrounding roads as a major issue for their business whilst 63 percent chose accessibility of motorways. Fifty-five percent of respondents also highlighted freedom of vehicle and freight movement within the industrial area as a major issue for their business.

Public Transport

- Whilst public transport does not rate highly as an influential factor for location decisions by respondents, one third of all respondents (31 percent) indicate that the provision of public transport in the area does not meet their need.
- The need for more train access and better public transport access to and from certain areas such as East and West Auckland were most often cited as the reason why public transport did not meet respondent's needs.
- Furthermore, when asked to identify their desired improvements for the area, almost one in ten respondents comment on developing better public transport facilities and promoting public transport as an option for travel to and from the area.

Cost of Land

- The increasing cost of land throughout the Penrose-Te Papapa business precinct emerged as a less positive aspect of the area with 60 percent of respondents indicating that there is at least some impact of cost of land on their location decisions.

Summary

- This research has identified many positive aspects to the Penrose-Te Papapa business precinct including the diversity of businesses located there, the area's good access to the motorways and its central location. Many businesses have been in the area for a long time, indicating the stability of their business and respondents are also positive about the future of their business in the area.
- Many respondents also have a clear vision for the area which includes being promoted as a strong business area, a hub or one stop supply area, portraying the area as a modern, efficient, integrated and significant business park type area and traffic and roading improvements.
- The majority of respondents have also demonstrated an interest in being informed of future economic development initiatives for Penrose-Te Papapa and for the wider Auckland region.
- However, it is also clear that many respondents are concerned about traffic and roading issues as well as the increasing cost of land throughout the Penrose-Te Papapa business precinct.

APPENDICES

Appendix One: Questionnaire

Appendix One: Questionnaire

Questionnaire

On-Line Questionnaire

The following questions will be formatted for on-line.

Auckland City Penrose-Te Papapa Business Precinct Survey

CONFIDENTIAL

This survey is for you to have your say about the Penrose-Te Papapa business precinct and what you think of it as a business location now and your views on its future.

This survey is confidential. Responses that you make to any question will not be attributable back to you or to your business. Whilst the data collected from this survey may be used to inform land-use surveys, nothing that specifically identifies your business will be used. Thank you very much for your time and support. Please start with the survey now by clicking on the **Continue** button below.

SECTION 1: OPEN-RESPONSE QUESTIONS ON THE PENROSE-TE PAPAPA AREA

1. Please list the specific advantages of your current location.

2. Please list the specific disadvantages of your current location.

3. What improvements would you like to see in the Penrose-Te Papapa business area in the next 5 years?

4. In your ideal world, what is your vision for what the Penrose-Te Papapa business precinct will offer businesses in the next five years?

5. What opportunities are there for the Penrose-Te Papapa business area that if developed further or enhanced will assist future business growth or development?

6. What are the issues or threats in the Penrose-Te Papapa business area that if not resolved will affect future business development?

SECTION 2: LOCAL AND EXTERNAL BUSINESS LINKAGES AND KEY DRIVERS

7. Please describe your businesses connections to other businesses in the Penrose-Te Papapa area. (For example, what relationships do you have with your suppliers or clients in the Penrose-Te Papapa area and where are they located?)

8. Please describe your businesses connections to other businesses within the Auckland region or throughout New Zealand (for example supplier links, customers, services, etc).

9. Do you own the premise in which the business is located?
   Yes ☐ No ☐ Don't Know ☐

10. To what degree does the cost of land today in your area affect your location decision?

Not at all	A little	Somewhat	Has an impact	Largely impacts	Not applicable
☐	☐	☐	☐	☐	☐

Comments:

11. To what degree did the cost of land in your area 5 years ago affect your location decision?

Not at all	A little	Somewha t	Has an impact	Largely impacts	Not applicabl e
☐	☐	☐	☐	☐	☐

Comments:

12. Is the availability of suitable land in your area an issue for your business?

Yes ☐ No ☐ Don't Know ☐

If yes, please explain further.

13. Does your business plan to expand in the next 5 years?

Yes ☐ No ☐ Don't Know ☐

14. If '*Yes*', will your expansion occur at your current site?

Yes ☐ No ☐ Don't Know ☐

15. Would you consider relocating your business or leaving within the next 5 years to another area?

Yes ☐ No ☐ Don't Know ☐

16. To which areas would you consider relocating?

17. To what degree was your decision to move to your current location influenced by one of the following factors? Please select **ONE** box only for each factor.

	Very	Somewhat	Not at all
Historical location - always been there	☐	☐	☐
Appropriately zoned land	☐	☐	☐
Sufficiently large land parcels	☐	☐	☐
Affordability of space for use	☐	☐	☐
Availability of space for use	☐	☐	☐
Access to customers and/or clients base	☐	☐	☐
Proximity to similar businesses	☐	☐	☐
Access to suppliers	☐	☐	☐
Access for staff	☐	☐	☐
Availability of car- parking	☐	☐	☐
Access to public transport	☐	☐	☐
Access to motorways	☐	☐	☐
Access to tertiary institutions and/or training facilities	☐	☐	☐
Proximity to owner's or manager's home	☐	☐	☐
Lifestyle for self and/or family	☐	☐	☐
Highly visible and/or profiled location	☐	☐	☐
Access to supplier logistics support	☐	☐	☐
Barriers to business competitors	☐	☐	☐
Locality of workforce	☐	☐	☐
Security and/or safety	☐	☐	☐

18. If your business is intending to move or expand over the next five years, to what degree do each of the following factors influence your decision. Please select **ONE** box only for each factor.

Not intending to move or expand *(go to Question 19)* ☐

	Very	Somewhat	Not at all
Affordability of space for use	☐	☐	☐
Sufficiently large land parcels	☐	☐	☐
Appropriately zoned land	☐	☐	☐
Availability of space for use	☐	☐	☐
Access to customers and/or clients	☐	☐	☐
Proximity to similar businesses	☐	☐	☐
Access to suppliers	☐	☐	☐
Access for staff	☐	☐	☐
Availability of car- parking	☐	☐	☐
Access to public transport	☐	☐	☐
Access to motorways	☐	☐	☐
Access to tertiary institutions and/or training facilities	☐	☐	☐
Proximity to owner's and/or manager's home	☐	☐	☐
Lifestyle for self and/or family	☐	☐	☐
Highly visible and/or profiled location	☐	☐	☐
Security and/or safety	☐	☐	☐
Not intending to expand	☐	☐	☐

SECTION 3: ISSUES FOR BUSINESSES IN THE PENROSE-TE PAPAPA BUSINESS AREA:

19. Does the provision of public transport in the Penrose-Te Papapa area meet the needs of your business.

Yes ☐ No ☐ Don't Know ☐

If no, please explain why:

20. Is there sufficient parking available for your business?

Yes ☐ No ☐

21. How many car parks does your business have on site?

22. What number of these are visitor car parks?

23. What number of these are staff car parks?

24. Which of the following are major transport issues for your business?

Parking availability.	☐
Accessibility of motorways.	☐
Freedom of vehicle and freight movement within the industrial area.	☐
Traffic congestion on surrounding roads.	☐
Regional connections.	☐
Other (please specify):	

25. Are there sufficient recreational or other facilities (e.g. parks, childcare, etc) in the area for employee use?

Yes ☐ No ☐ Don't Know ☐

26. What additional recreational or other facilities are needed?

SECTION 4: BUSINESS CLASSIFICATION INFORMATION

27. Which industry sector does your business / organisation belong to? Please tick **ONE** box that most appropriately describes your business / organisation.

Manufacturing (choose from)

- ☐ Food, Beverage and Tobacco
- ☐ Textile, Clothing, Footwear and Leather Manufacturing
- ☐ Wood and Paper Product Manufacturing
- ☐ Printing, Publishing and Record Media
- ☐ Petroleum, Coal, Chemical and Associated Product Manufacturing
- ☐ Non- Metallic Mineral Product Manufacturing
- ☐ Metal Product Manufacturing
- ☐ Machinery and Equipment Manufacturing
- ☐ Other Manufacturing, Please Specify

Wholesale Trade (choose from)

- ☐ Basic Material Wholesaling
- ☐ Machinery and Motor Vehicle Wholesaling
- ☐ Personal and Household Good Wholesaling

Property and Business Services

- ☐ Renting and leasing assets (commercial & residential property)
- ☐ Property development
- ☐ Financial and investment services
- ☐ Scientific research
- ☐ Architecture, Quantity Surveying, and Engineering services
- ☐ Marketing, Advertising, Public Relations and Reputation services
- ☐ Legal services
- ☐ Business management services, IT and Employment related services

Construction (choose from)

- ☐ General Construction
- ☐ Construction Trade Services

Retail Trade (choose from)

- ☐ Food Retailing
- ☐ Personal and Household Good Retailing
- ☐ Motor Vehicle Retailing and Services

Transport and Storage (choose from)

- ☐ Services to Transport
- ☐ Storage

☐ Communication Services

☐ Finance and Insurance

☐ Education

☐ Health and Community Services

☐ Agriculture, Forestry and Fishing

☐ Personal and Other Services

☐ Mining and Quarrying Services

☐ Electricity, Gas and Water supply

☐ Accommodation, Restaurants, Cafes and Bars

☐ Government Administration and Defence

☐ Cultural and Recreational Services

☐ Not elsewhere included*

*Please State: ______________________________

28. Please describe the exact nature of your business and what your business outputs are (for example what do you produce or what are your main services).

____
____
____
____
____

29. What is your annual turnover in New Zealand dollars? (**optional**)

Under $100,000	☐	$100,000-250,000	☐	$250,000-500,000	☐
$500,000-1 million	☐	$1-2 million	☐	$2-5 million	☐
$5-10 million	☐	$10+ million	☐	Don't Know	☐
I prefer not to answer this question				☐	

30. What was your annual business turnover in New Zealand dollars 5 years ago? (**optional**)

Under $100,000	☐	$100,000-250,000	☐	$250,000-500,000	☐
$500,000-1 million	☐	$1-2 million	☐	$2-5 million	☐
$5-10 million	☐	$10+ million	☐	Don't Know	☐
I prefer not to answer this question				☐	

31. How many years has this business been located in the Penrose-Te Papapa business area?

0-1 ☐ 1-5 ☐ 5-10 ☐ 10-15 ☐ 15-20 ☐ 20-35 ☐ 35+ ☐

32. If your answer to Question 31 is less than 5 years, what was the reason for your location/relocation to the Penrose-Te Papapa business area?

____

____

____

____

33. From where did you relocate?

____

____

34. Please give an indication of how many people are employed in your business?

0 ☐ 1-5 ☐ 6-9 ☐ 10-19 ☐ 20-49 ☐ 50-99 ☐ 100+ ☐

35. How many people do you expect to employ in 5 years time

0 ☐ 1-5 ☐ 6-9 ☐ 10-19 ☐ 20-49 ☐ 50-99 ☐ 100+ ☐
Don't Know ☐

36. Does your business import? In addition, what percentage of input is imported?

Yes ☐ No ☐ Percentage ______

37. Does your business export? In addition, what percentage of output is exported?

Yes ☐ No ☐ Percentage ______

38. Do you maintain partnership arrangements with other companies?

(a) Nationally: Yes ☐ No ☐

(b) Internationally: Yes ☐ No ☐

Thank you for your help.

Would your business like to receive more information on economic development issues in the Penrose-Te Papapa business area or wider Auckland economy?

Yes ☐ No ☐

39. Would your business like to receive information electronically on economic development issues in the Penrose-Te Papapa business area or wider Auckland economy?

Yes ☐ No ☐

40. Would your business be interested in taking part in a business association?

Yes ☐ No ☐

41. Would your business like to take part in a focus group on issues facing businesses in the Penrose-Te Papapa business area?

Yes ☐ No ☐

42. Business Name:____

43. Physical Address:____

44. Postal Address:____

45. Website:____

46. Please state the key contact in your business for further enquiries regarding this business precinct survey.

Name:____

Job Title:____

Business Phone Number:__________________Fax Number:____________________

Email Address:____