

OurRiver

cooks river sustainability initiative



OURRIVER BUSINESS SURVEY

Subcatchments Summary Report



Acknowledgements

The authors would like to acknowledge all the work completed by consultant Annie Coulthard which included collating business data for each subcatchment, conducting the Business Water Survey and preparing the draft Business Survey Reports for each subcatchment.

The OurRiver team would also like to record their appreciation for the assistance and contribution made by volunteer Edward Hernandez during the completion of this report.

This report was completed by the OurRiver – Cooks River Sustainability Initiative in February 2010.

EXECUTIVE SUMMARY

The OurRiver Business Water Survey was undertaken as part of a three year project funded by the NSW Environmental Trust Urban Sustainability Program. OurRiver is a partnership between eight councils – Ashfield, Bankstown City, Canterbury City, City of Sydney, Hurstville City, Marrickville, Rockdale City and Strathfield and is focused on six local areas (subcatchments) within the Cooks River Catchment. The survey was designed to provide the project with information on the current attitudes and practices of businesses around water conservation and water quality.

This report provides a summary of the results from all six subcatchments surveyed. From an estimated 1,551 businesses across the subcatchments, 1,075 were successfully contacted for the survey and 200 responses were obtained, representing approximately 13% of the total businesses in the subcatchment. These businesses were mostly small businesses located in shopfronts and warehouses (62%) with less than 10 employees (69%).

One of the most significant outcomes from the survey was the close relationship identified between ownership of the business building and overall attitudes to the waterway environment, to water and energy saving, and to the survey itself. The majority of businesses in the subcatchments leased their premises (70%). Comments made by staff from these businesses indicated that they had very little responsibility, and even less ability to do anything about the issues covered in the survey including water conservation.

The businesses who leased their premises often shared their toilets and washing facilities with other retailers and building residents, and knew very little about how much water they used. Water bills were generally sent directly to landlords and costs were often divided amongst tenants and included in their rent. Many also commented that their landlords were generally not interested in sustainability issues.

Encouragingly however, more than half of the businesses surveyed (68%) had some form of water conservation or reuse device installed. Just over half the businesses (51%) had environmental policies, procedures and/or officer roles in the business. Most survey respondents (86%) were also not opposed to using recycled water if it were available.

More than half the respondents (62%) indicated that businesses had some responsibility for the health of the waterway environment, with some stating that this responsibility should be shared with government agencies. The majority of respondents (79%) said that their business had an important role to play in protecting the local environment. Furthermore while many businesses are not currently participating in any government environmental program, a number of respondents volunteered information about their recycling habits and most (80%) said they would be interested in being part of a program.

On conclusion of the survey, nearly all respondents (93%) agreed to being contacted by Council in the future regarding sustainability and business.

Contents

Executive summary.....	ii
Introduction.....	1
Ashbury Subcatchment	2
Eastern Channel East Subcatchment.....	2
Munni Street Subcatchment.....	2
Rookwood Road Subcatchment.....	2
Strathfield South Subcatchment.....	2
Upper Wolli Creek Subcatchment.....	2
Survey Methodology	3
Results	3
About your company/business.....	3
Water use	10
Environmental programs and policies	17
Attitudes to the Environment.....	19
Future Engagement with Businesses.....	22

List of Figures

Figure 1: OurRiver Subcatchments and Cooks River Catchment (outlined in black).....	1
Figure 2: Business types	3
Figure 3: Tenure of business premises.....	5
Figure 4: Type of company/business premises.....	6
Figure 5: Company/business duration in premises.....	8
Figure 6: Number of employees per business	9
Figure 7: Significance of water expenses in relation to overall business budget.....	11
Figure 8: Water usage.....	12
Figure 9: Water conservation or re-use devices currently installed.....	14
Figure 10: The perceived effect on businesses if a 50% cut in water use was necessary due to increased water restrictions.	16
Figure 11: Participation in environmental programs.....	17
Figure 12: Number of businesses with an environmental role or policy	18
Figure 13: Attitude to spending money on water and energy saving.....	19
Figure 14: Attitude to the impact of their business on the environment	20
Figure 15: Attitude to government agencies' responsibility for the waterway environment.....	21
Figure 16: Attitude to the role businesses have in protecting the local environment.....	22

INTRODUCTION

The Cooks River Sustainability Initiative (OurRiver) is an innovative three-year project funded by the NSW Government through its Urban Sustainability Program. OurRiver is a partnership between eight of the 13 councils within the Cooks River Catchment. The eight partner councils are Ashfield Council, Bankstown City Council, City of Canterbury, City of Sydney, Hurstville City Council, Marrickville Council, Rockdale City Council and Strathfield Council. One of the project's objectives is to improve ecosystem health within the six project areas (known as subcatchments) through an integrated planning process involving all relevant stakeholders. The six OurRiver subcatchments are:

- Munni Street (City of Sydney)
- Upper Wolli Creek (Hurstville City Council, Rockdale City Council and City of Canterbury)
- Eastern Channel East (Marrickville Council)
- Ashbury (Ashfield Council and City of Canterbury)
- Strathfield South (Strathfield Council)
- Munni St (Bankstown City Council)



Figure 1: OurRiver Subcatchments and Cooks River Catchment (outlined in black)

As part of the background research for each Subcatchment a consultant was contracted to undertake the 'Business Water Survey'. This report details the aggregated results from all six OurRiver subcatchments. A brief description of each subcatchment is included below.

Ashbury Subcatchment

The Ashbury Subcatchment covers part of the suburb of Ashbury and includes sections of Lees and Peace Parks, Canterbury Park, and Canterbury Park Racecourse. Based on the 2006 Census the Ashbury Subcatchment has a population of approximately 2,329. The Subcatchment falls within the boundaries of the City of Canterbury and Ashfield Municipal Council.

Of the 11 businesses contacted in this subcatchment, only 1 response was received to the survey. The data from this single response (Canterbury Council section) has only been included in this Summary Report as there is no Ashbury Subcatchment business survey report available.

Eastern Channel East Subcatchment

The 131ha Eastern Channel East Subcatchment (EC East) is located in the east of the Marrickville LGA and encompasses parts of the suburbs of Enmore, Newtown and St Peters. The subcatchment is bounded approximately by Enmore Road to the north, King Street / Princes Highway to the east, Silver Street to the south and Enmore Park and Marrickville Metro to the west. The Illawarra / Bankstown railway line passes through the lower reaches of the subcatchment.

Based on data from the 2006 Census, the EC East Subcatchment has a population of around 7660. The subcatchment contains a large number of high income, well-educated and predominantly English speaking households. There is also a high proportion of households that are renting compared to the LGA as a whole.

Munni Street Subcatchment

The Munni Street Subcatchment covers parts of the suburbs Erskineville, Alexandria, Eveleigh and Newtown. The subcatchment is bordered by King Street to the north, Sydney Park Road to the south west, Euston and McEvoy Streets to the south and Wilson Street to the north east. Based on the 2006 Census the Munni Street Subcatchment has a population of approximately 14,484.

Rookwood Road Subcatchment

The Rookwood Road Subcatchment consists largely of commercial and industrial areas with a residential pocket in the south west. It also contains the Potts Hill Reservoir which is surrounded by green space, and the Chullora Wetlands (a locally important environmental asset) which run into Freshwater Creek and the Cooks River.

Strathfield South Subcatchment

The Strathfield South Subcatchment includes parts of the suburbs of Belfield, Chullora, Greenacre and Strathfield South. The subcatchment is bordered by the Hume Highway, Roberts Rd, Juno Parade, Punchbowl Rd, Centenary Dr and the Cooks River. Based on the 2006 Census the Strathfield South Subcatchment has a population of approximately 2,989.

Upper Wolli Creek Subcatchment

The Upper Wolli Creek Subcatchment covers parts of the suburbs Beverly Hills, Kingsgrove and Bexley North. The subcatchment is bordered by Homer St to the north and Stoney Creek Road to the south and it includes a section of the M5 motorway. Based on the 2006 Census the Upper Wolli Creek Subcatchment has a population of approximately 10,175.

SURVEY METHODOLOGY

A business database for each subcatchment was compiled from information taken from the internet and the White and Yellow Pages. A survey consisting of 17 questions was developed and conducted interview style by telephone in April 2009. The survey consisted of four main sections – About your company/business (Q 1-5), Water use (Q 6-13), Environmental programs and policies (Q 14-16) and Attitudes to the environment (Q 17). The responses from each subcatchment were entered into a separate database by the consultant via the web-based tool 'Survey Monkey'. Results were downloaded from Survey Monkey as Excel spreadsheets which were then used to generate the figures and charts contained in this document.

RESULTS

From an estimated 1,551 businesses within the six OurRiver Subcatchments, 1075 were successfully contacted and 200 responses were obtained, (13% of the total businesses). All 200 respondents answered all questions except where noted under the relevant question.

About your company/business

Q1. Your company/business is:

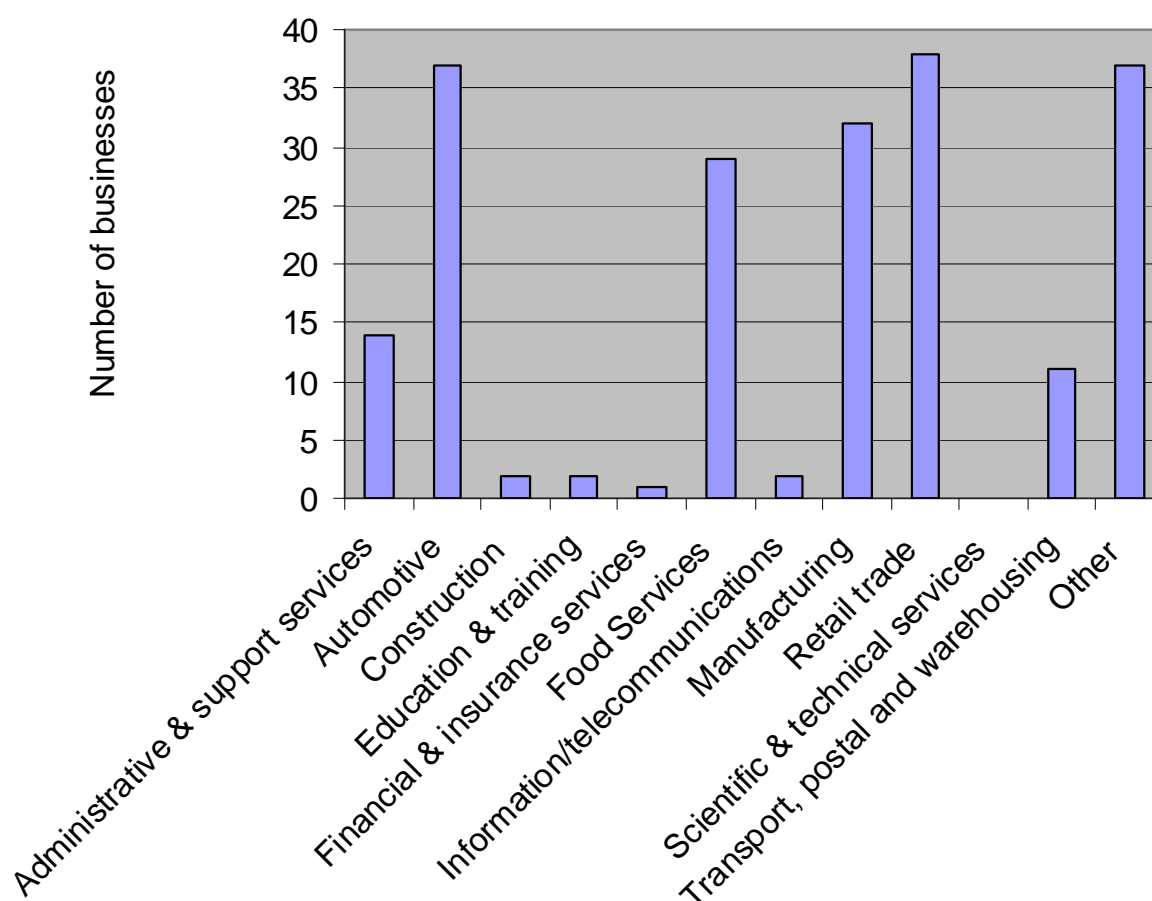


Figure 2: Business types

The majority of businesses who responded to the survey were retail followed closely by automotive and made up 38% of all responses. Five businesses gave an answer that fell into

both a named category and the 'Other' category. These are shown below in **Error! Reference source not found.**

Businesses whose answer only fell in the 'Other' category are listed below in **Error! Reference source not found.**

Table 1: Answers from businesses that provided an answer in a named category and the 'Other' category

Named category	'Other' category
Manufacturing	Retail trade
Retail trade	Imports spectacle frames
Food services	Residential hotel
Retail trade	Timber
Retail trade	Wholesaler

Table 2: Answers from businesses that provided an answer only in the 'Other' category. Where more than one business provided the same answer the number of businesses is included in brackets

'Other' category
Accommodation bookings
Alternative health
Distributor
Electrical constructor
Fire protection
Furniture imports
Graphic Design
Hairdressing (4)
Health service
Hotel
Installing security systems
Launderette (2)
Performing arts venue
Physiotherapy (2)
Preservation of works of art
Printing (2)
Rehearsal studio
Removals
Scrap metal recycling and dealer
Sports centre
Theatre (2)
Travel
Wholesale (3)

Q2. My company/business premises is:

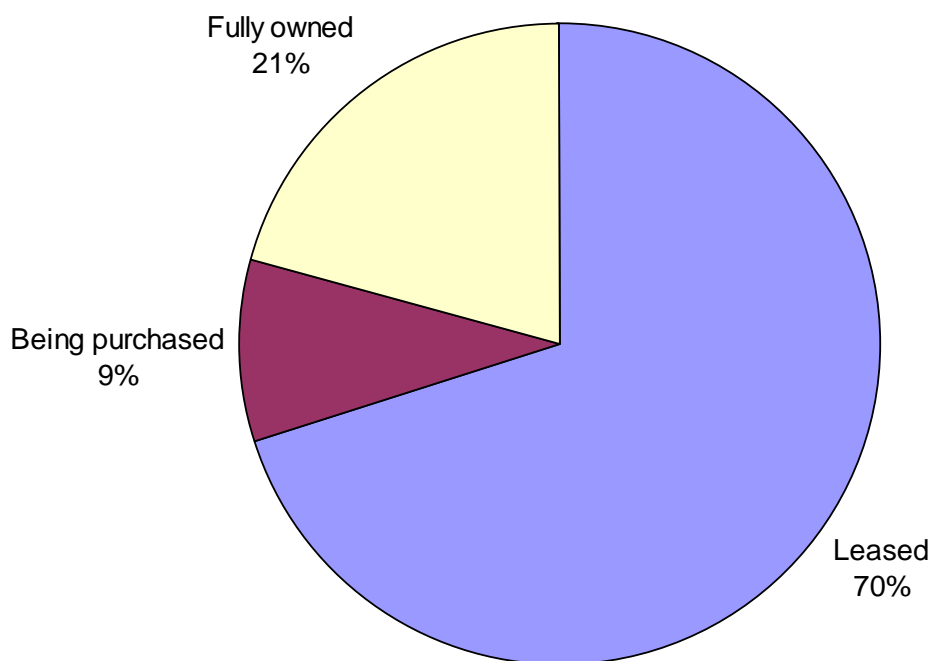


Figure 3: Tenure of business premises

Three businesses did not respond to this question.

70% of respondents lease their building and this seemed to be the biggest factor in terms of their overall attitudes to the survey, to the waterway environment and to water and energy saving. The majority of leasing respondents articulated in some way that because they rented their premises they had very little responsibility and even less ability to do anything about the issues the survey brought up.

Many suggested that their landlord should be contacted, and that their landlord was not interested in sustainability and therefore their hands were tied in terms of making even small changes to water and energy usage. 21% of respondents fully own their premises and they seemed more open to thinking about the questions posed in the survey.

Q3. My company/business premises is located in a:

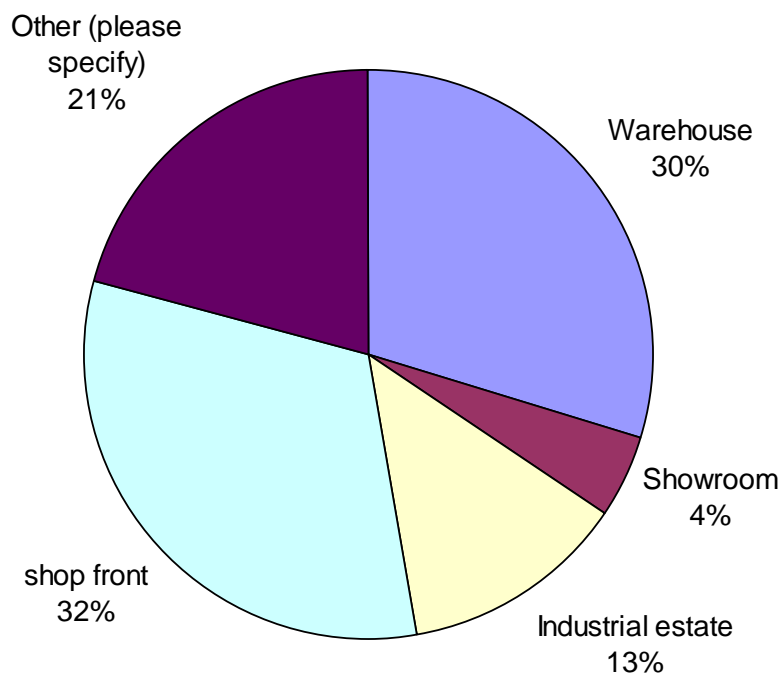


Figure 4: Type of company/business premises

The majority of respondents were located in a shop front or a warehouse. Many of the shop front businesses share their toilet and washing facilities with other retailers and residents in other parts of their building. These businesses tend to have complicated water billing arrangements in place with other water users in the building.

Respondents said their landlord created a system where each type of tenant (commercial, residential etc.) paid a percentage of the water bill which was included in their rent. These businesses knew the percentage they paid but did not know how much the water bill was, or how much in dollar/litre terms, their contribution was. 13% of respondents are located on industrial estates and they have the same kind of billing problems as some of the retailers.

One business gave an answer that fell into both a named category and the 'Other' category. This business said that they were both a shop front which also had offices.

Businesses whose answer fell in the 'Other' category only are listed below in **Error! Reference source not found.**

Table 3: Answers from businesses that only provided an answer in the 'Other' category. Where more than one business provided the same answer the number of businesses is included in brackets

'Other' category
College buildings
Depot. office space, workshop
Factory (13)
Garage
Hotel (4)
Industrial lot (3)
Office (4)
Residential (2)
Showroom/apartment/shopfront/manufacturing area
Theatre (2)
Workshop (8)
Wrecking yard

Q4. How long has your company/business been located at these premises?

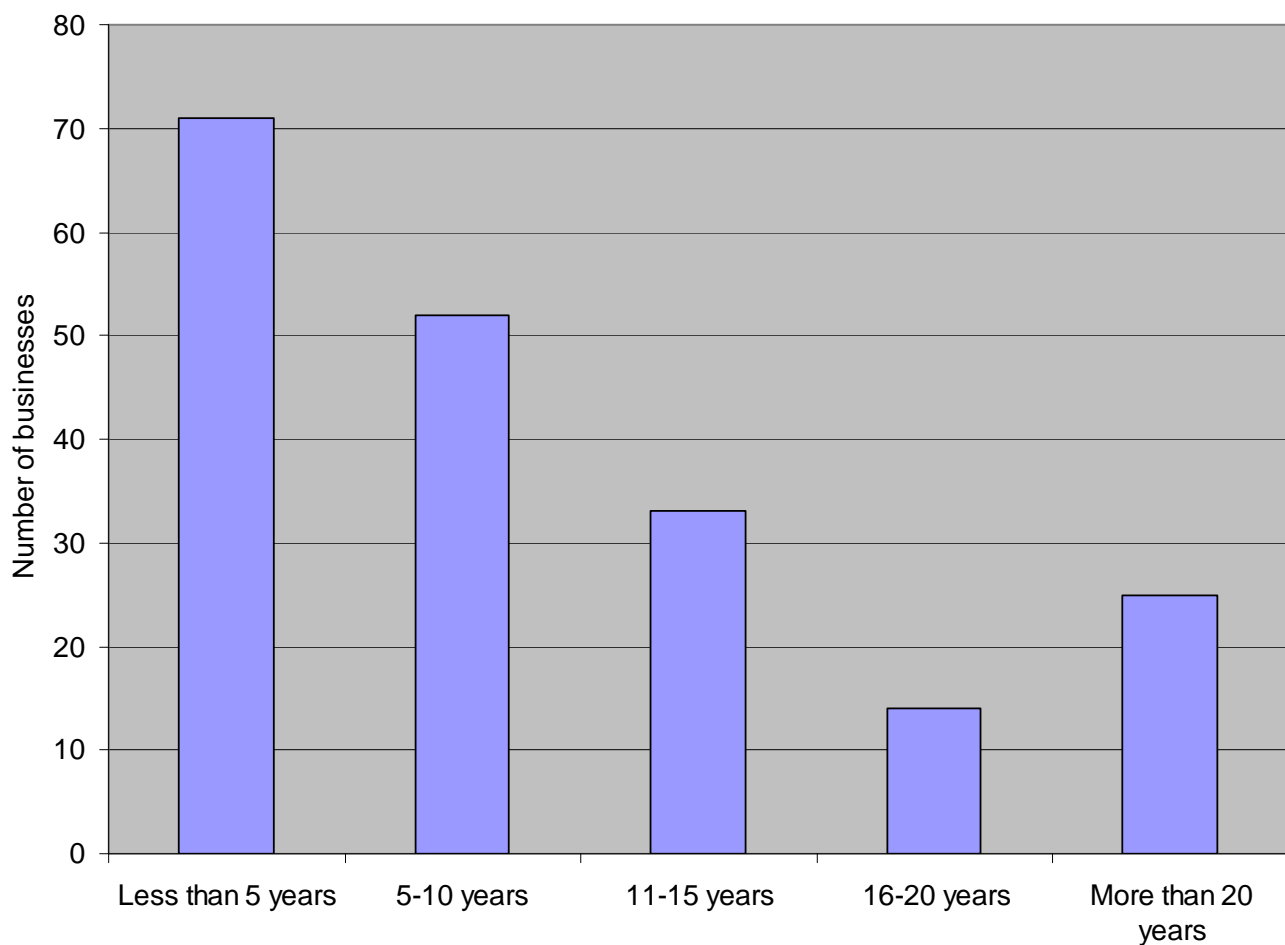


Figure 5: Company/business duration in premises

Five businesses did not respond to this question.

The majority of respondents (36%) have been in their current premises for less than five years. 25 businesses have been in their current premises for more than 20 years.

Q5. How many people work at this location?

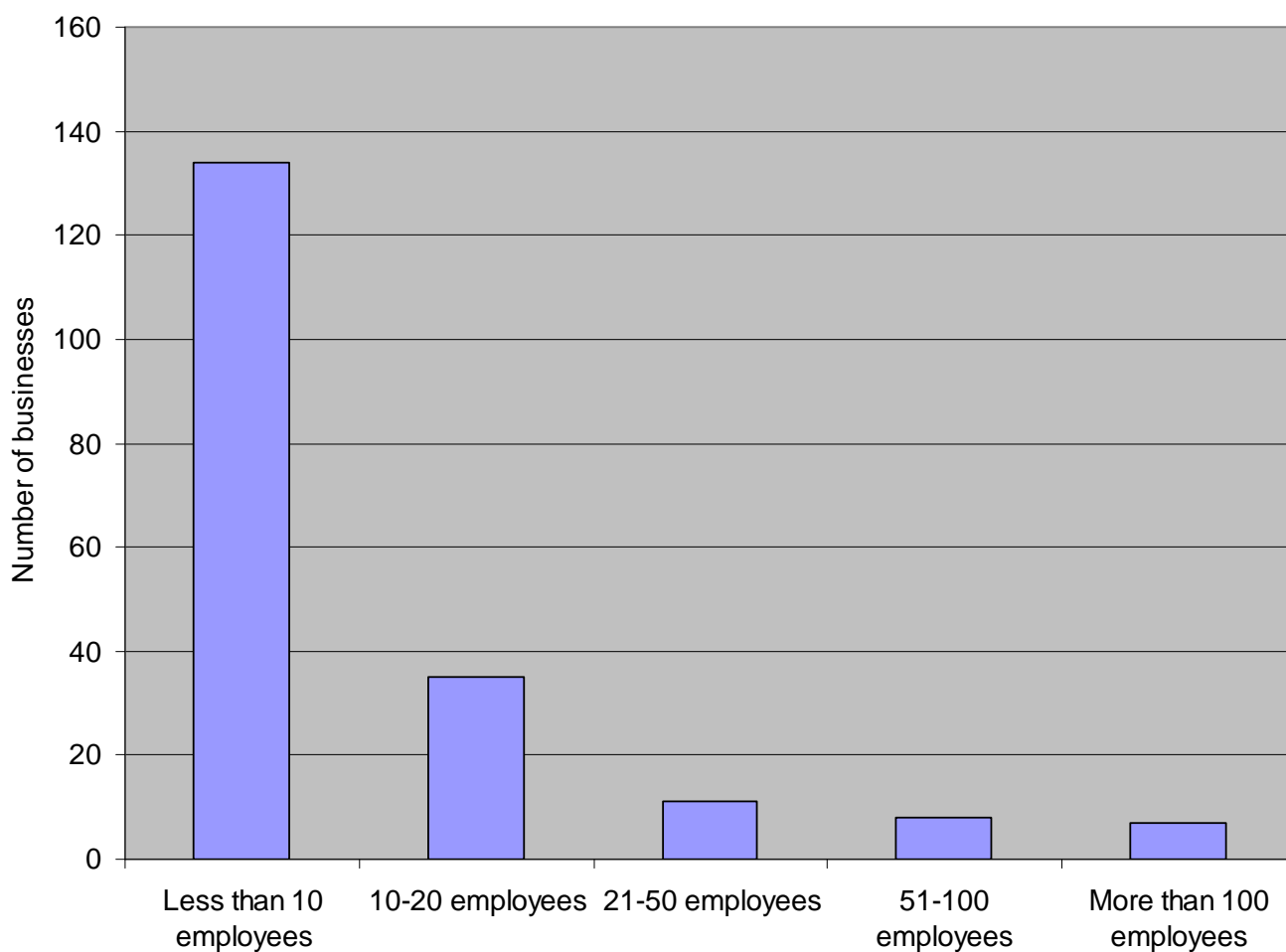


Figure 6: Number of employees per business

Five businesses did not respond to this question.

Most businesses who responded to the survey were small, with fewer than 10 employees (69%), but there are seven which have over 100 staff.

Water use

Q6. Last financial year how much water did your company/business use (kilolitres¹) and how much did this cost?

Seven businesses did not respond to this question.

A summary of the results to this question are provided below:

- 68 businesses did not have any knowledge about their water bill (three of these had their water bill sent directly to their head office for payment);
- 52 businesses that lease their premises said their water bill goes to the landlord, 51 of these have their water usage charged to them as part of their rent, and one pays a separate amount of \$440 per year to their landlord for water;
- One business said that the premises were not metered and one business said that they do not pay a water bill but did not provide any other information. One business shared domestic water facilities with the rest of their block and did not get a bill;
- 29 businesses knew how much their water bill was for the year but not how many kilolitres this was; and
- 22 businesses knew how much their full bill was per year.

Only 19 businesses knew their water usage in kilolitres and how much this cost. Their water usage ranged from 2 kL to 848 kL (Table 4). For all the businesses that were able to provide their costs for water, this varied greatly from \$40 to \$27,000 a year (including service charges).

Table 4: Annual water consumption and cost

Usage in Kilolitres per year	Water cost per year
2 kL	\$24
16 kL	\$25
71 kL	\$593
80 kL	\$120
122 kL	\$201
176 kL	\$280
200 kL	\$320
207 kL	\$785
220 kL	\$354
281 kL	\$118
300 kL	\$250
308 kL	\$480
452 kL	\$724
760 kL	\$1,256
848 kL	\$1,200
850 kL	\$13,680
3176 kL	\$5,240
4340 kL	\$251
5636 kL	\$9,072

¹ 1 kilolitre = 1,000 litres
OurRiver Business Water Survey
Summary Report

Q7. In relation to the company/ business budget your water expenses are:

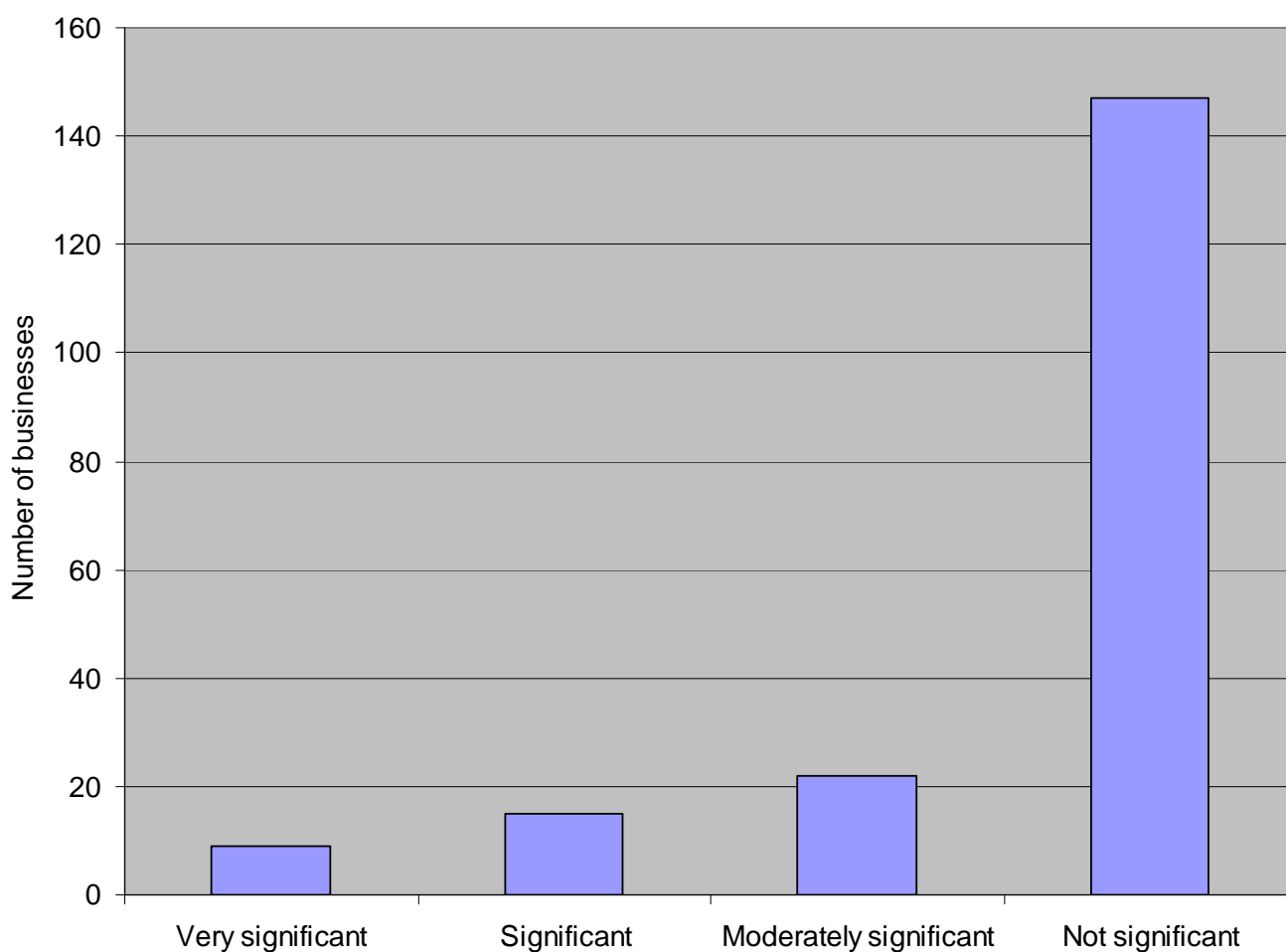


Figure 7: Significance of water expenses in relation to overall business budget

Seven businesses did not respond to this question.

The majority of respondents (74%) said that water expenses were not significant in relation to their overall business budget.

Only 5% of businesses said their water bill was very significant, and 19% said their bill was significant or moderately significant.

Q8. What does your company/business use water for?

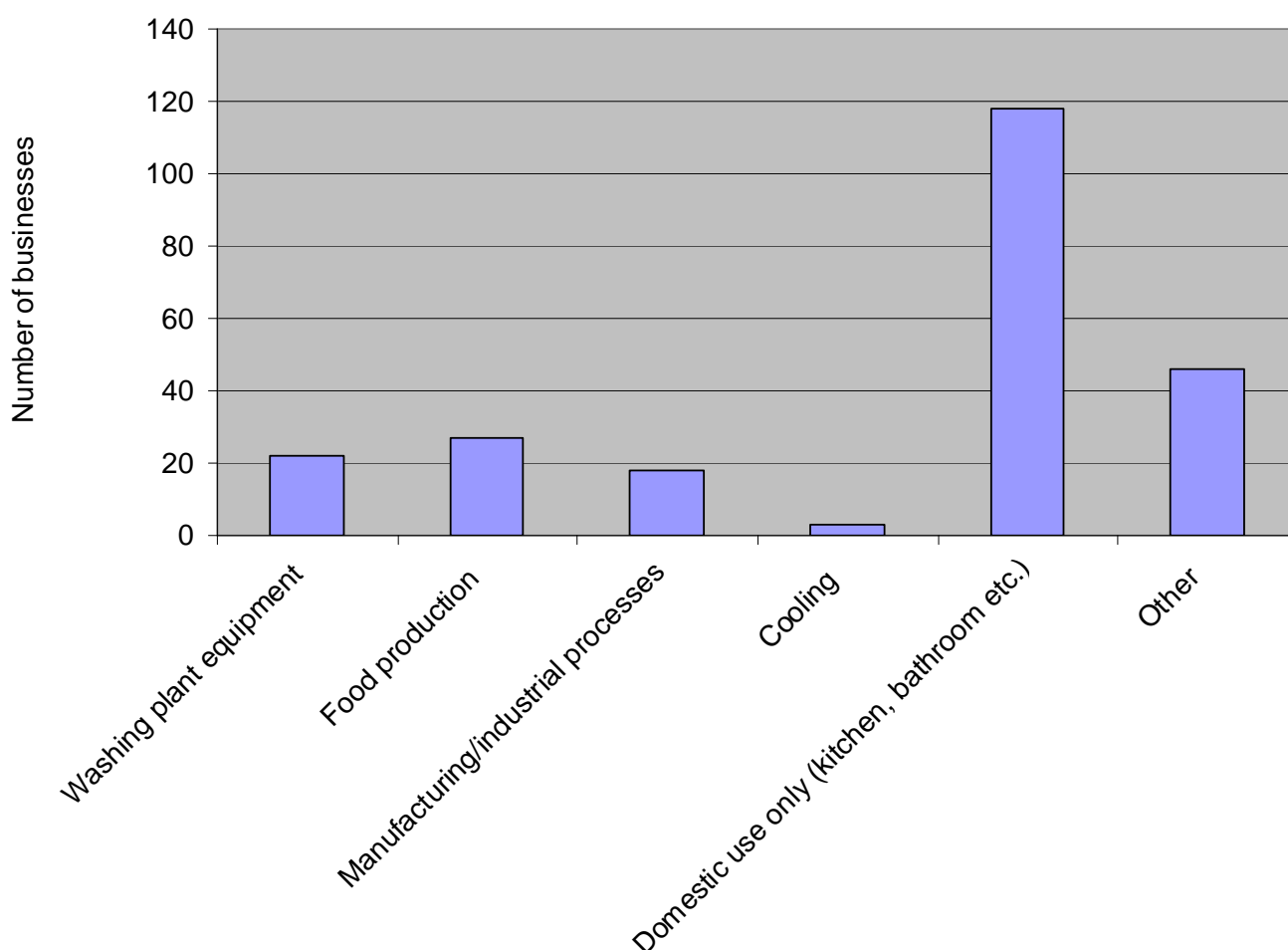


Figure 8: Water usage

One business did not answer this question.

Most respondents used water for domestic purposes (60%) or food production (14%). 35 businesses answered both in a named category and in the 'Other' category. Answers given in the 'Other' category are listed in Table 5.

Trying to obtain this information was difficult – most respondents began their answer by saying 'oh we don't use any water' and then had to be questioned further to find out how they used it.

Table 5: Answers from businesses that provided an answer in a named category and the 'Other' category. Where more than one business provided the same answer the number of businesses is included in brackets

'Other' category
Residents also use the water
Prior to water restrictions used hose, now use part cleaner tanks with water
Canteen, 5 kitchens, bathrooms, showers, washing of vehicles
Cleaning (2)
Commercial laundry
Domestic use (5)
Domestic use, clean up of equip
Domestic, 2 washrooms, cleaning, dishwashing,
Domestic, laundry, cleaning
Food production, domestic use
Glass washer
Hair washing (3)
Hairwashing, domestic
Laundry (5)
Laundry, dishwashers, glass washers
Laundry, hair washing
Laundry, shower, washing cars occasionally
Pickle, and ultrasonic cleaning unit
Shampooing, laundry
Showers for residents, domestic use, hosing down beer garden
Steam cleaning engines
Washing
Washing car panels
Washing equipment (3)
Washing parts and vehicles
Washing vehicles (7)

Q9. Does your company/business currently have any water conservation or re-use devices installed?

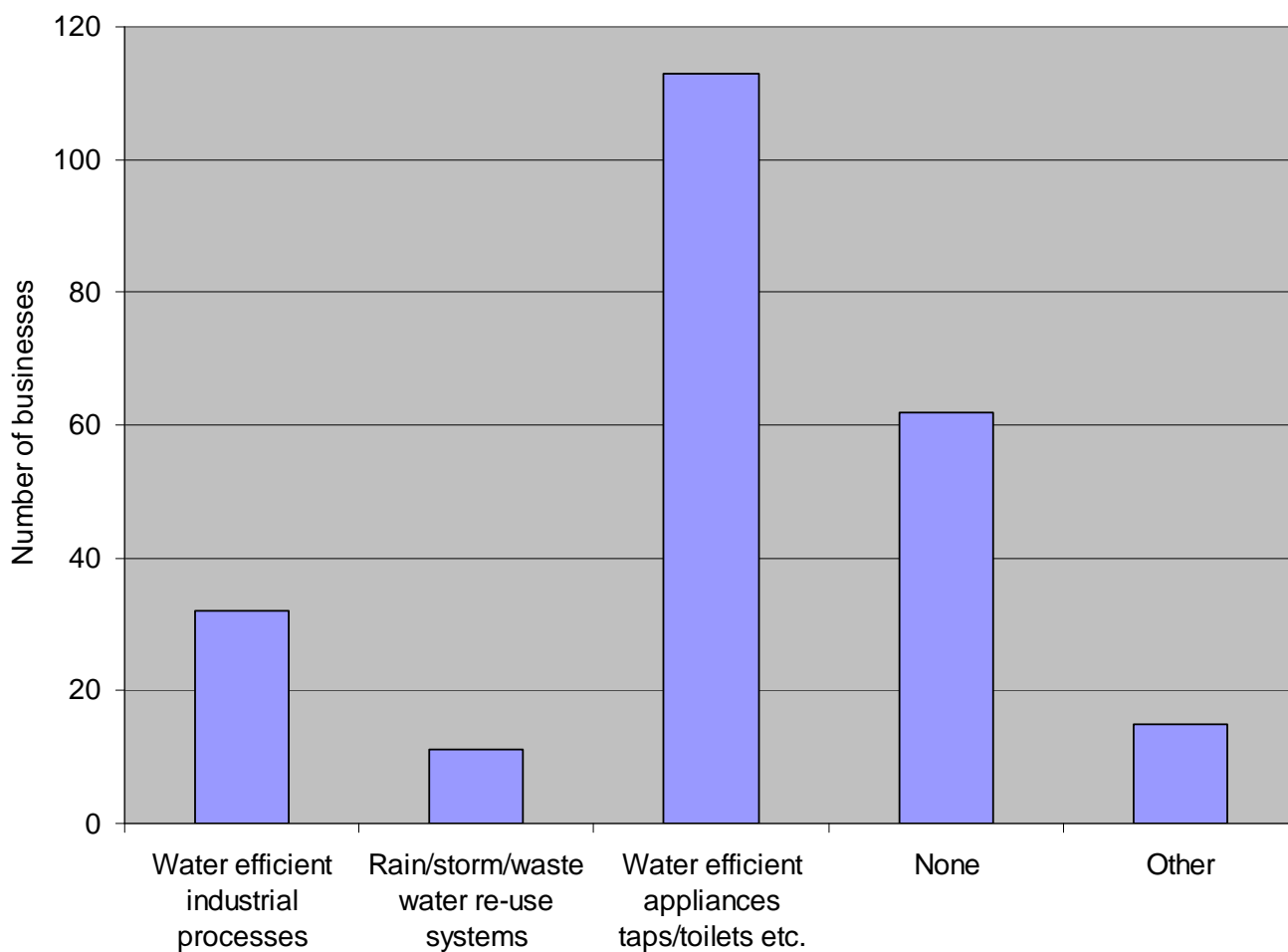


Figure 9: Water conservation or re-use devices currently installed

Four businesses did not respond to this question.

68% of all respondents had some form of water conservation or reuse device installed. Eleven businesses have a re-use system installed and 32 have a water efficient industrial process.

Most devices installed were water efficient taps or toilets (58%) and 32% have no water conservation or re-use devices of any kind.

Q10. If there are water tanks or water re-use systems installed what is the capacity (litres)?

Nine businesses have a rainwater tank. The capacities are:

- 700 litres,
- 800 litres,
- 1,000 litres (2 tanks),
- 5,000 litres,
- 10,000 litres,
- 10,000 kilolitres,
- 15,000 kilolitres, and
- one of unknown capacity.

One business wanted to install a rainwater tank but was in negotiation with an unwilling industrial estate manager.

Q11. And what do you re-use the water for?

Water from the 800 L, 10,000 L, and 15,000 kL tanks are used on the garden. Water from the 700 L and 5,000 L tanks are used for cleaning. Water from both of the 1,000 L tanks are used to wash floors. Water from the 10,000 kL tank is used to wash vehicles and water from the tank of unknown capacity is used in a fountain and on the garden.

Q12. Would your company/business use recycled water, for an appropriate purpose, if it were available?

Three respondents did not answer this question.

86% of respondents said they were not opposed to the idea of using recycled water but many added that neither they nor their land lords would be able to do that. No further information was given to support that statement.

The words 'use reticulated recycled water' were used in this question for the first subcatchment surveyed (Strathfield South) but it was confusing for the majority of respondents. The initial reaction to the question was also outrage because respondents thought it was being suggested that they use untreated water for domestic purposes. The word 'reticulated' was removed and the question reworded while completing the first subcatchment survey to include the words 'use recycled water for an appropriate purpose'.

Q13. If water restrictions were brought in requiring a 50% cut in water use would your company/business:

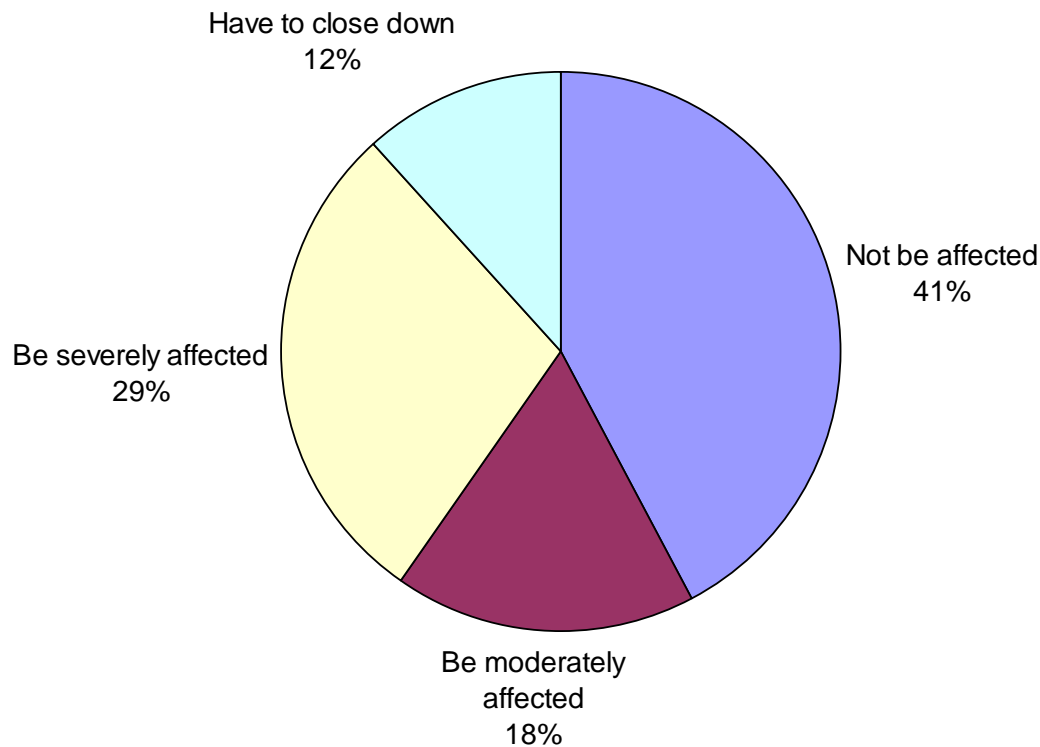


Figure 10: The perceived effect on businesses if a 50% cut in water use was necessary due to increased water restrictions.

One business did not respond to this question.

12% of respondents said they would have to close down. 29% of respondents would be severely affected. 41% of respondents said they would not be affected by a 50% cut in water use.

Often respondents said 'we wouldn't be affected because we only use water for making cups of tea and going to the toilet'. Any reduction to some low users of water would therefore have a more personal affect on staff rather than on the business operation as a whole.

Environmental programs and policies

Q14. Does your company/business currently participate in any environmental programs?

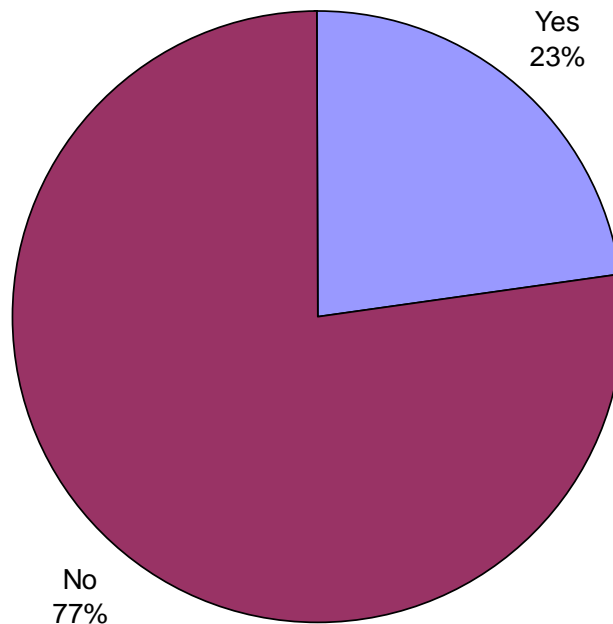


Figure 11: Participation in environmental programs

Two businesses did not respond to this question.

77% of respondents did not participate in an environment program. Most people volunteered information about their recycling habits with this question. Respondents of note include a café in the Munni Street Subcatchment which is working with The Watershed (a sustainability resource centre in Newtown) to reduce its waste, and a laundry service which is using an innovative ozone technique to reduce water temperatures, and is with Sydney Water to reduce water usage. Another respondent who was a shop owner in the EC East Subcatchment commented that she was still using a small broom given to her by her local Council a number of years ago as part of an environmental program. It was used to sweep rubbish from the footpath in front of her premises into the bin rather than let it go down the storm water drain. She said she always told new neighbouring shop owners why this was a good idea.

Q15. Would your company/business consider participating in an environmental program with Council, State or Federal Government?

80% of respondents said they would participate in a government environmental program.

Q16. Does your company/business currently have any of the following:

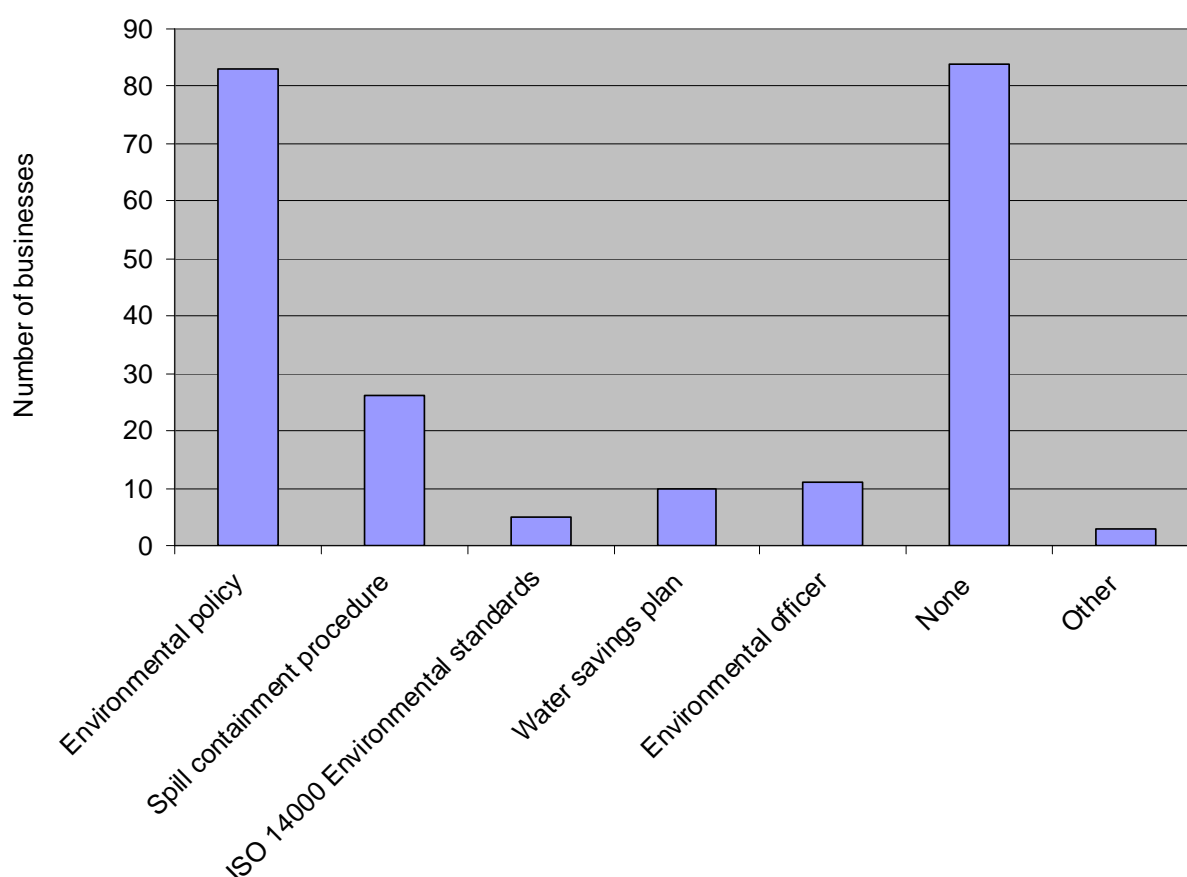


Figure 12: Number of businesses with an environmental role or policy

15 businesses did not respond to this question.

51% of respondents had some form of environmental policy, procedure or role at their business. 45% of respondents have an environmental policy. Businesses were considered to have an environmental policy if they had made active business decisions about the environment – for instance to recycle, to switch appliances and lights off, and were implementing these across organisation. It was not necessary for the policy to be written down.

26 businesses have spill containment procedures, 11 businesses have an environmental officer, and five businesses adhere to ISO environmental standards. Businesses whose answer fell in the 'Other' category are listed below in **Error! Reference source not found..** Some of these were listed in addition to environmental policies, water savings plans and/or spill containment procedures.

Table 6: Answers from businesses that only provided an answer in the 'Other' category

'Other' category
An environmental committee (Marrickville Council)
Scheme to brush street rubbish into bin rather than the gutter (Marrickville Council)
Energy saving reduction plan in collaboration with council (Marrickville Council)

Attitudes to the Environment

The final part of the survey was quite difficult to articulate to businesses. The respondents found the wording confusing, the questions too long to be able to understand over the phone and as a result some of the questions were paraphrased to make them easier to understand. These questions also provoked most of the negative comments from respondents. Although the term 'waterway environment' was explained in detail the consultant undertaking the survey did not feel that this term was understood by the majority of respondents.

Q17.

- a) Do you think that short term cash flow is more critical than the long term financial savings that can be gained by investing in the installation of water and energy saving fixtures?

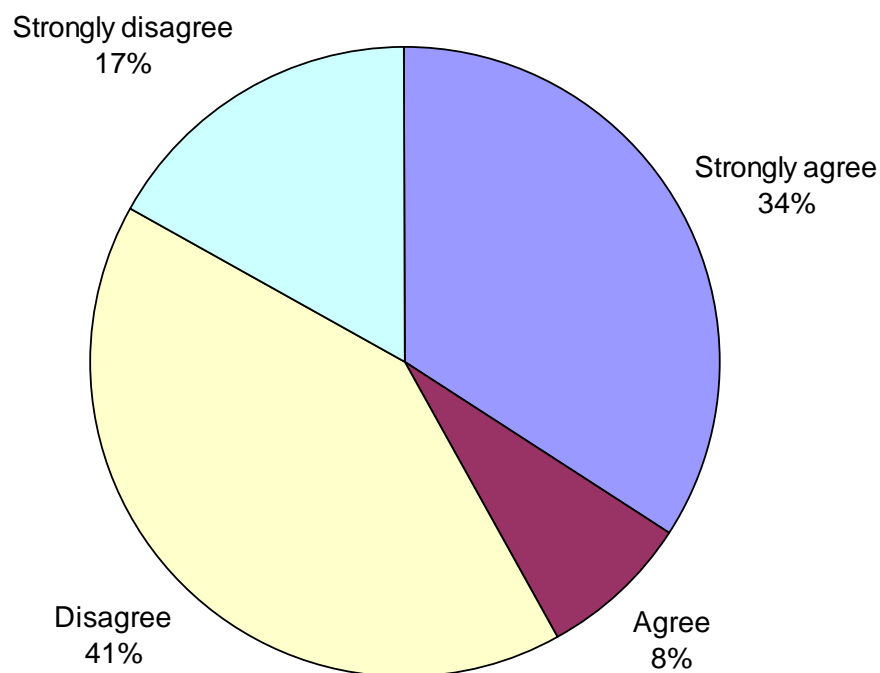


Figure 13: Attitude to spending money on water and energy saving

Four businesses did not respond to this question.

This question was reworded to 'Short term cash flow is more important to me at the moment than thinking about investing in water and energy saving'. 58% of businesses expressed some level of disagreement with the statement.

b) Do you think the daily activities of your business have a detrimental impact on the waterway environment?

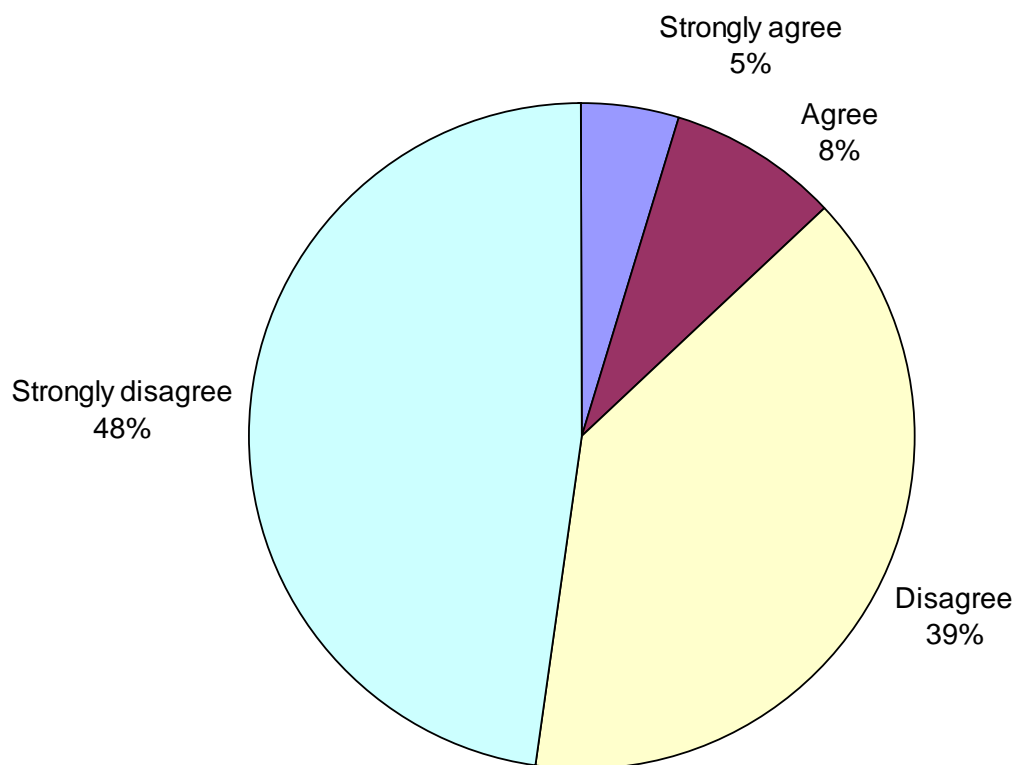


Figure 14: Attitude to the impact of their business on the environment

Seven businesses did not respond to this question.

The word 'detrimental' was substituted for 'negative' during the phone surveys as most respondents understood the word negative to mean 'little or no'. 87% of respondents either strongly disagreed or disagreed. This was a hard question to ask as many respondents took offense to the suggestion they were harming the environment, as they believed they had already indicated they were not in the early part of the survey.

c) Do you think that government agencies should be mainly responsible for the waterway environment rather than businesses?

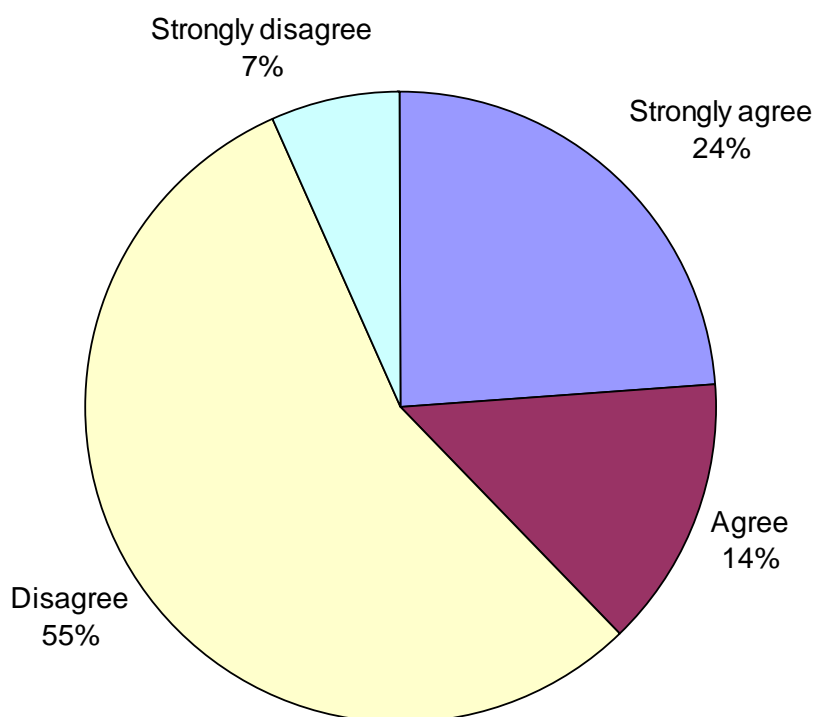


Figure 15: Attitude to government agencies' responsibility for the waterway environment

Seven businesses did not respond to this question.

Some respondents did not understand the difference between 'the government' and 'government agencies'; many respondents asked 'what are government agencies?'.

62% disagreed with the statement in some way which may indicate that they feel businesses also had a responsibility for the waterway environment.

d) Do you think your business has an important role in protecting the local environment?

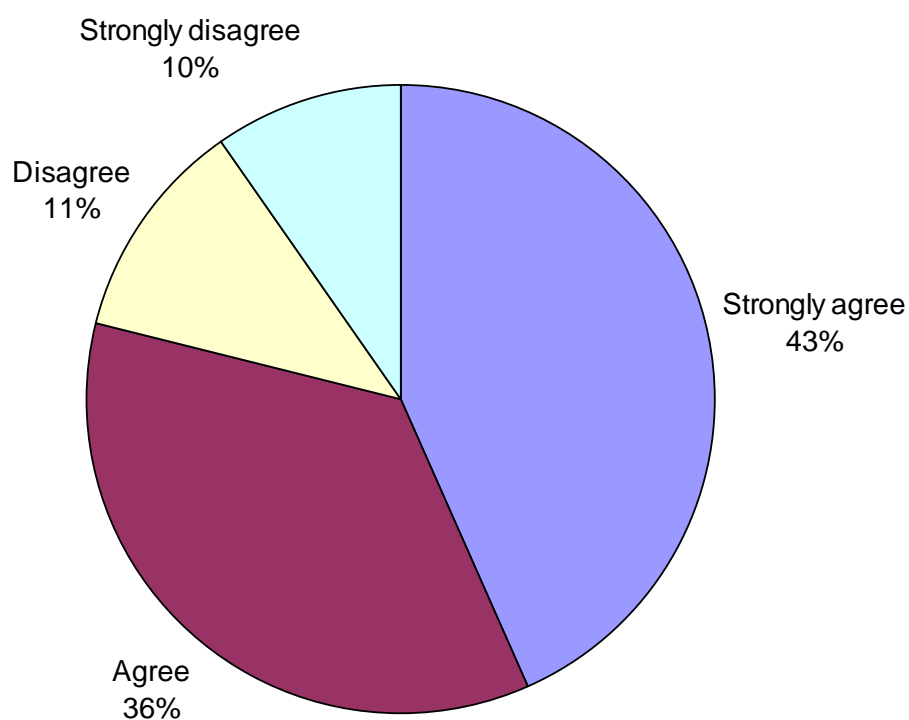


Figure 16: Attitude to the role businesses have in protecting the local environment

Six businesses did not respond to this question.

79% agreed or strongly agreed with this statement.

Future Engagement with Businesses

Respondents were asked if they agreed to being contacted by Council in the future regarding water sustainability and business. Nearly all businesses who responded to the survey (93%) across the 6 subcatchments agreed to this.