Break O'Day
COUNCIL

Business Survey

August 2019

Version: 1 – Date: August 2019

Introduction

This survey has been designed to capture economic and visitor trends in the Break O'Day region and will be sent to businesses at least two times a year.

The survey is distributed via a link directly emailed to a business database. If you would like to be included on this database, please email Jayne.richardson@bodc.tas.gov.au.

The first survey was sent out to a business database of 132 on 1 August 2019 and 48 Businesses responded. This is a response rate of around 36%, mostly from the St Helens area.

Survey Details

In order to be able to compare like for like information, the survey has been largely designed to be multiple choice. By doing this it allows us to group data together and compare like information with like information.

The survey has also been broken in to several sections in order to allow us to separate out accommodation businesses and ask them specific questions about occupancy and overnight stays.

The first survey, sent in August 2019, was designed to establish a benchmark so that we could more accurately represent the impact the Mountain Bike Trails will have on our area. In order to really understand any changes to visitation and the economy, we will need 12 months of collated data.

Due to the way the survey has been designed, we are also able to offer businesses individual records of their data so that they can use this information for their own purposes.

Key Findings of this survey (August 2019)

- The majority of visitors to our area are intrastate (Tasmanian)
- The survey was conducted during the off-season so visitation rates are expected to be low
- The majority of businesses in our area are small, owner operator businesses
- Staffing levels are comparable to this time last year
- Occupancy rates at this time (off peak) remain low although some businesses still reported more than 50% - showing visitation is still valid in the off-season.
- Night stays for this time of year are low.

General Information

Q1. - Business Name

This remains confidential

Q2. Position of person completing the survey.

This remains confidential

Q3. Town where your business is located

The majority of respondents were from the St Helens area

- St Helens 28 (58.3 %)
- St Marys 4 (8.3%)
- Beaumaris/Scamander 10 (20.83%)
- Pyengana/Weldborough 1 (2.08%)
- Other 5 (10.42%)

Of the five Other respondents - three were based in Binalong Bay, one in Priory and the other provided services to the entire municipality.

Where are visitors coming from?

Q4 and Q5. Regarding business growth when compared with the same time last year. Q6. The origin of visitors over last 3 months. Q7. Origin of visitors generally.

If respondents stated they had experienced an increase in business when compared to the same period last year for Q4, they were automatically sent to Q5 and Q6 where they were asked where they thought this increase in visitation came from.

Two respondents skipped Q4, 13 answered they had experienced an increase, and 12 respondents answered Q5 and Q6. (One respondent skipped both Q5 and Q6).

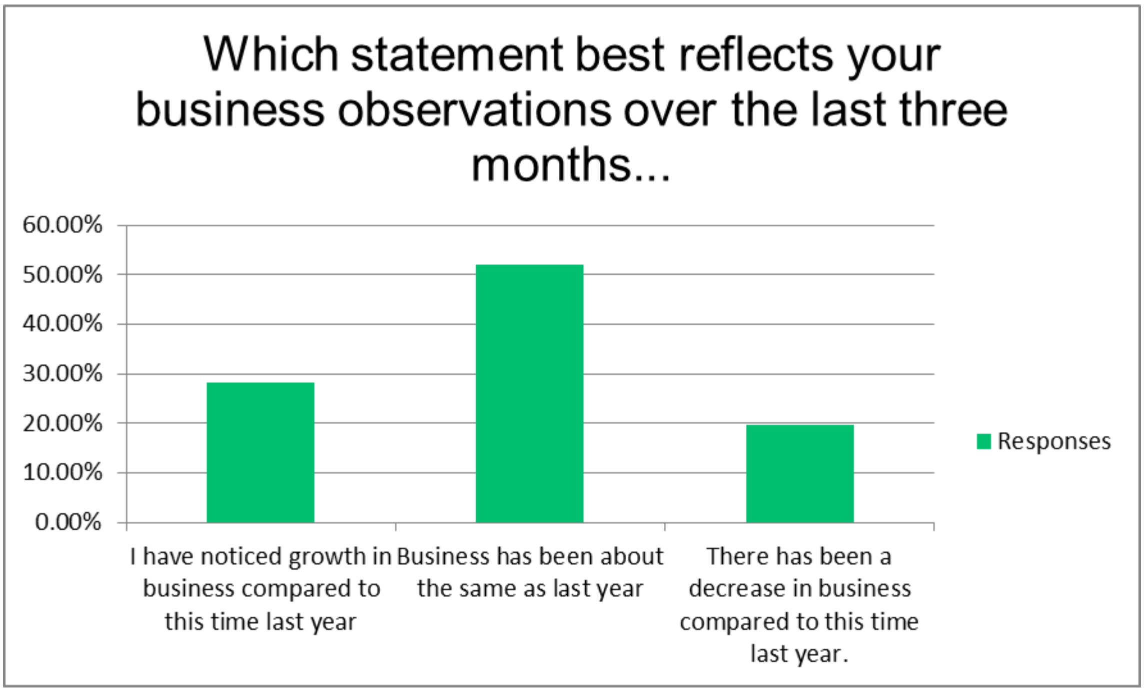
Just over 50% of participants reported that business was about the same as last year. These businesses were from a range of sectors including hospitality, retail, services and real estate.

28% noticed growth and 19% said they had experienced a decrease.

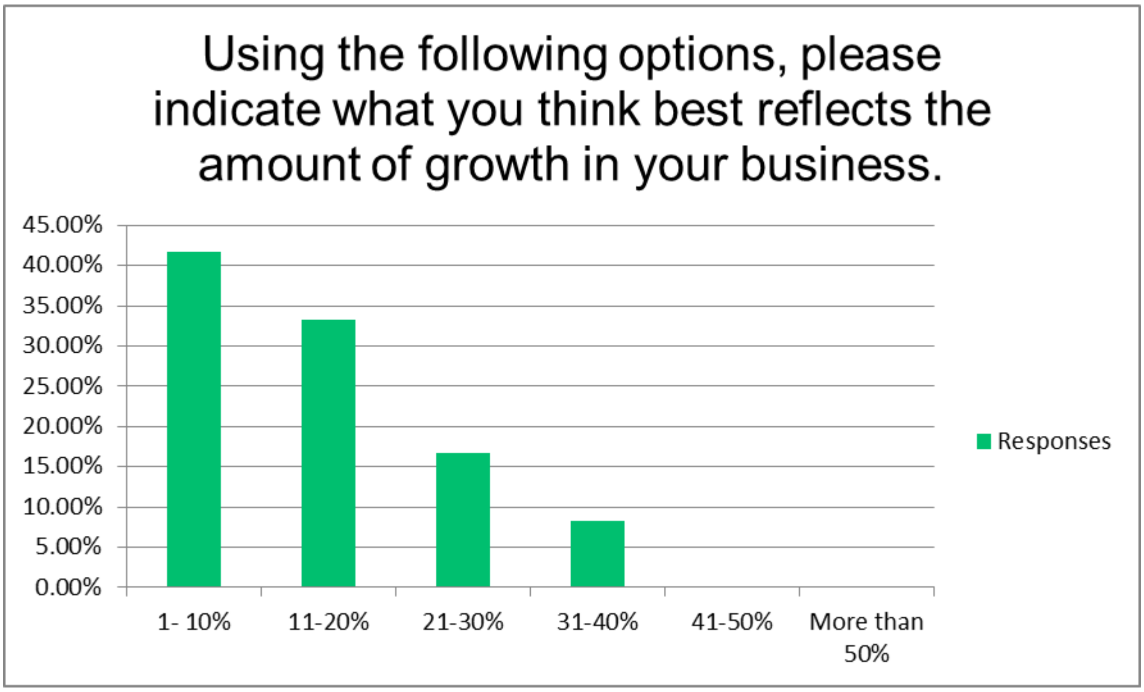
Of the 13 businesses that reported experiencing an increase; Five reported 1-10% increase, Four 11-20%, with two reporting 21-30% increase and one 31-40% increase. The majority of businesses attributed these extra visitors as being from mainland Australia, 58.33%, with a third stating they believed they were from intrastate (Tasmanian).

The above information is interesting when compared to Q7, where businesses believed their visitors came from. Of the 45 businesses that answered this question, around 58% stated they believed the origin of their visitors were from Tasmania with 42.2% reporting the mainland. This would indicate an increase in mainland Australian visitors – this correlates with data from Tourism Tasmania. **Tourism Snapshot Year ending June 2019.*

Q4

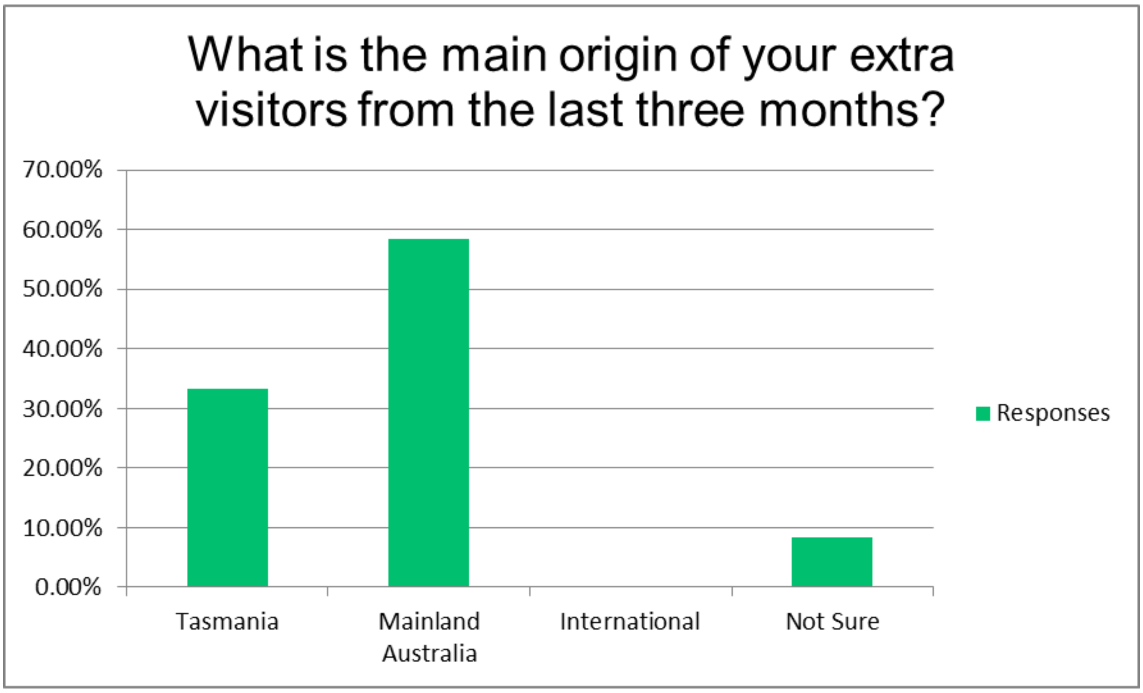


Q5



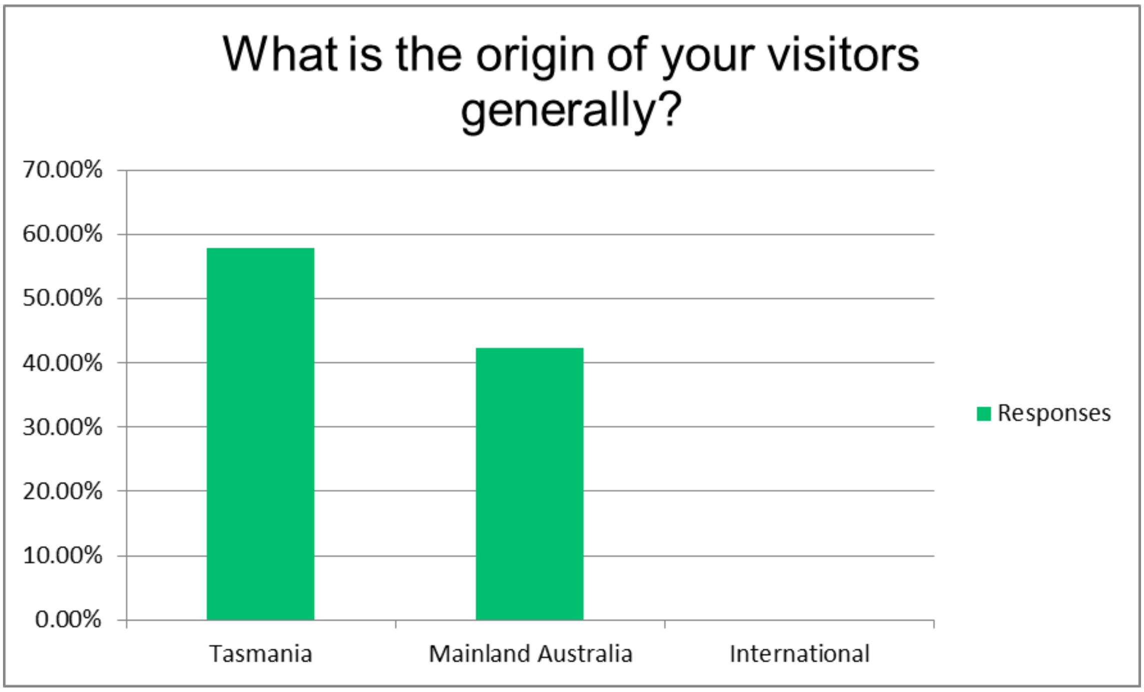
Using the following options, please indicate what you think best reflects the amount of growth in your business.
45.00%
40.00%
35.00%
30.00%
25.00%
20.00%
15.00%
10.00%
5.00%
0.00%
1- 10%
11-20%
21-30%
31-40%
41-50%
More than 50%
Responses

Q6



What is the main origin of your extra visitors from the last three months?
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
Tasmania
Mainland Australia
International
Not Sure
Responses

Q7



Conclusion

The majority of visitors to our area are generally from Tasmania however businesses are experiencing an upwards trend in mainland visitors to our area.

As this survey was conducted in the off-season, we can also conclude that visitation for this usually slow time is showing some growth.

Employment

Q8. How many people do you employ. Q9, 10, 11 Increase, decrease or stable workforce and FTEs.

The first of the employment questions asked how many people, including yourself did the business employ.

About two thirds of businesses employed between 1 -5 people. The remaining third was largely 6-10 employees with one business reporting 16-20 employees and three, more than 20employees.

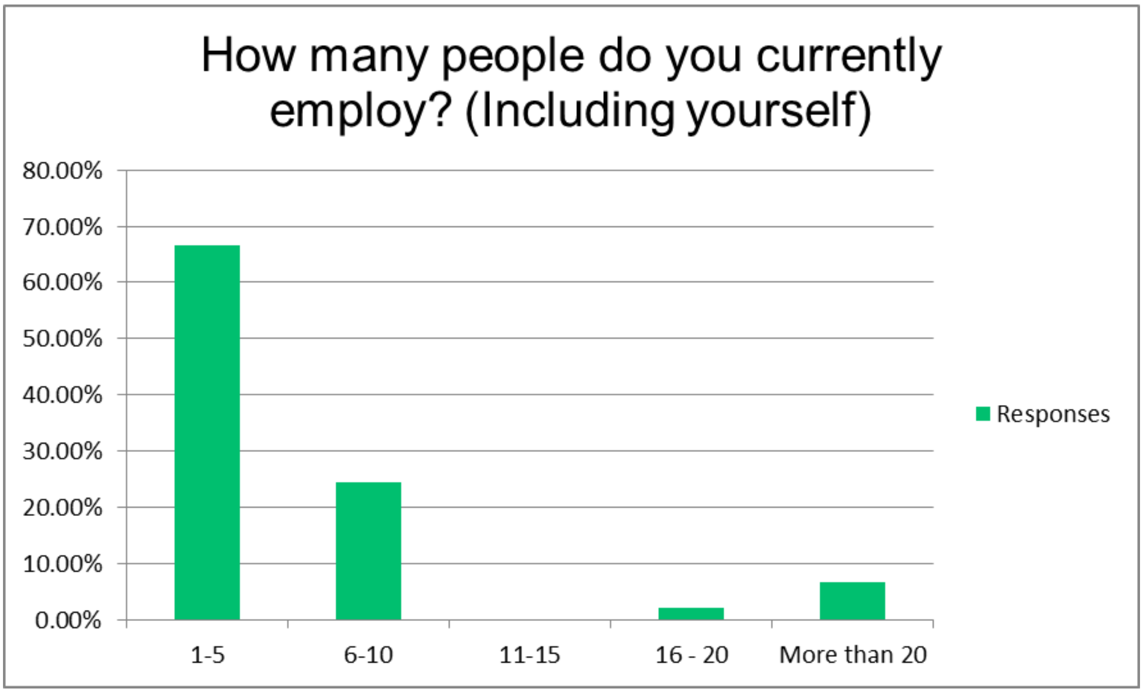
Just over 60% of these businesses reported that staffing had not changed over the last three months, 9% had to employ extra staff, seven had to lay off staff and 6 stated other. Of these 6, 1 was a volunteer run organisation, two were owner operator, one was an invalid response, one reported seasonal workers, the other retained all staff but had to decrease their shifts.

Of the 48 respondents, 3 skipped Q8 and 9.

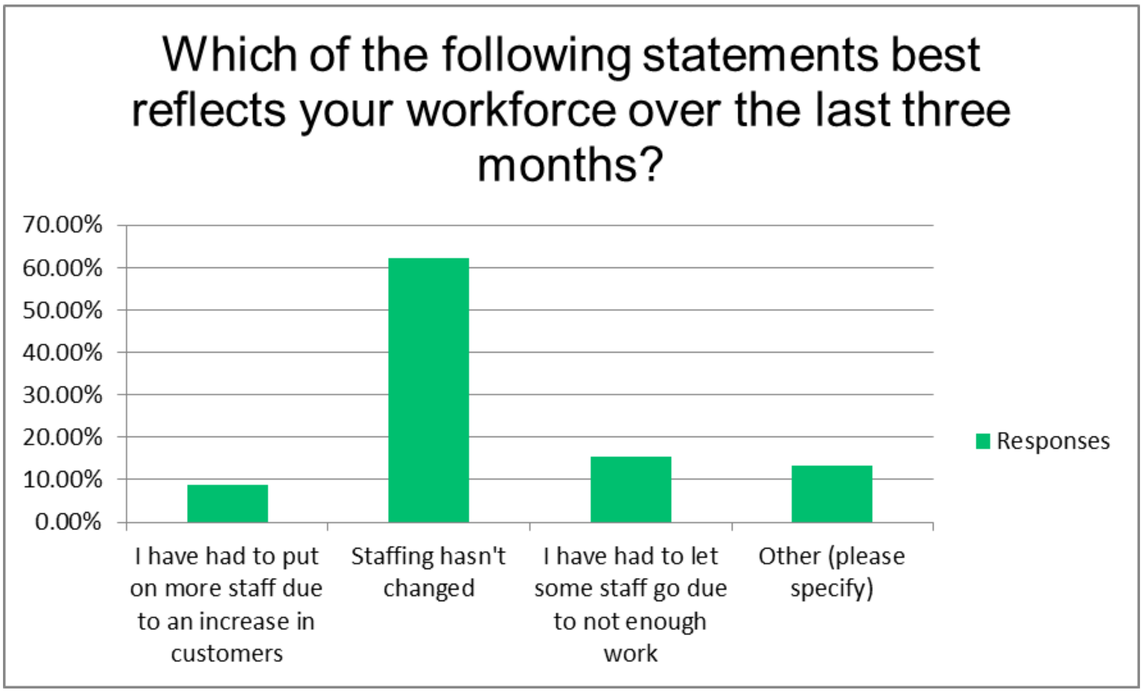
The six respondents that reported they had increased their staff were then directed to questions to understand this increase in employment. Two of the six respondents skipped Q10 and Q11.

Two respondents reported they had put on one additional staff member while the other two reported putting on between 1- 3 staff. In terms of FTE, two reported 2FTE positions, one, 0.5FTE and one invalid answer. (As this was an open question there is no graph to depict this.)

Q8



Q9



Q10

Conclusion

The majority of businesses in our area are small owner operator style businesses.

Staffing levels have largely remained the same compared to this time last year. As this survey was completed during a visitation trough, we can assume the time of the year may also have been a factor in employment opportunity.

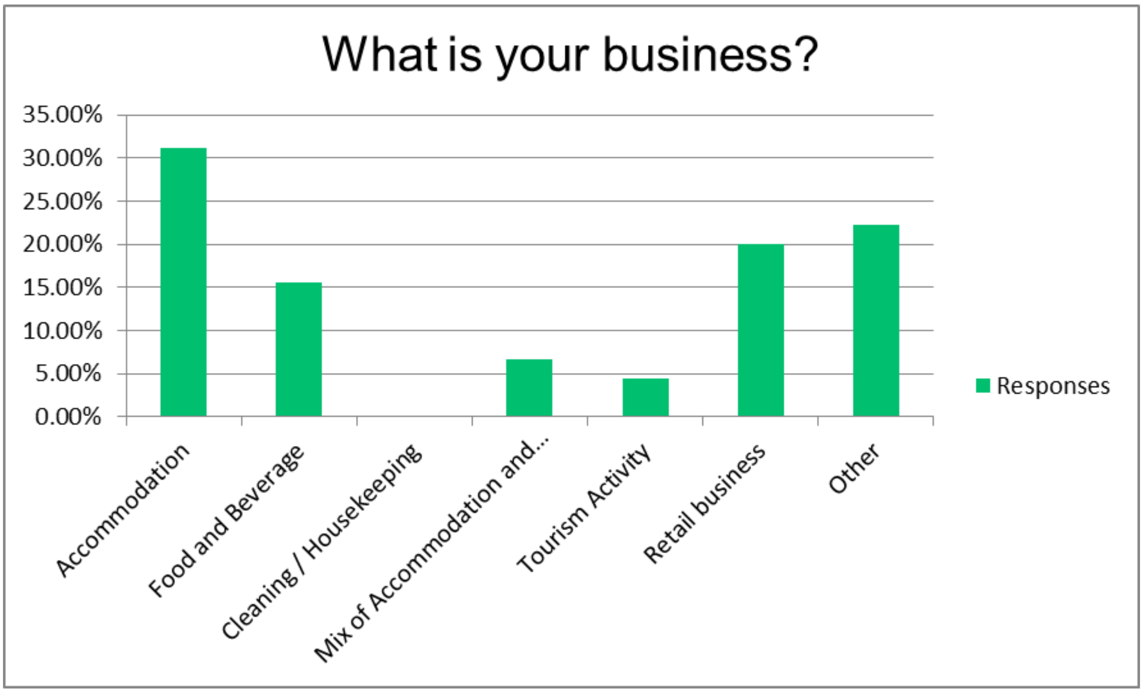
Business detail

Q12 Type of business

This question was designed to single out accommodation businesses so that we could gather a bit more information about night stays. The results for this question are as follows.

• Accommodation	31.11%
• Food and Beverage	15.56%
• Mix of Accommodation and Food and Beverage	6.67%
• Tourism Activity	4.44%
• Retail Business	20%
• Other	22.22%

Q12



As the Other section was significant it is worth noting the following:

- 3 were related to health and wellbeing services
- 1 could have been classified as a tourism activity
- 1 should have been classified as accommodation
- 1 should have been classified as food and beverage
- 1 should have been classified as retail
- Remaining 4 were other.

With is information in mind it is recommended that the next survey will ask businesses to choose the closest category for their business and include a health and well-being service.

Accommodation

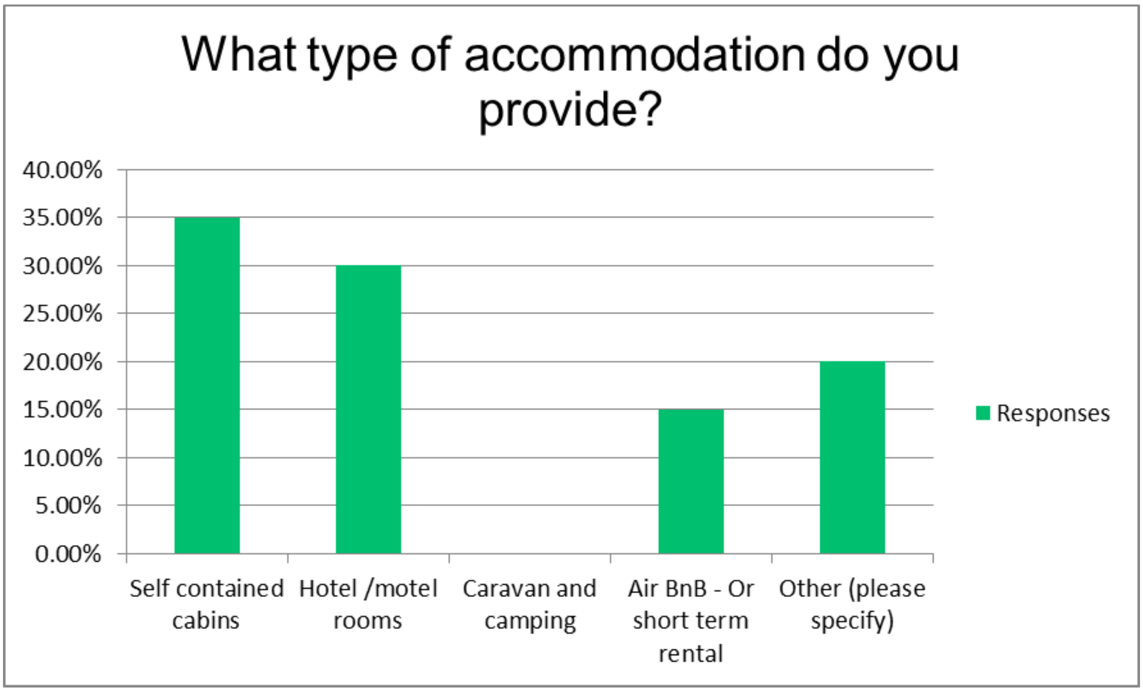
Q13, What type of accommodation do you provide?

The following data was collected from just the accommodation businesses and was answered by 20 respondents.

Q13 asked the respondent to specify their accommodation business.

- 35% self-contained cabins
- 30% Hotel / motel rooms
- 15% Air bnb
- 20% Other

Q13



While the Other category seems over represented, this was only four of the 20 respondents. When we examined this a little closer we found;

- 1 could have been classified camping
- 1 was a mix of self-contained, camping and caravans
- 1 was a Bed and Breakfast
- 1 was not applicable and not an accommodation business at all

Night Stays
Q14, Q15, Q16 and Q17

The following data was collected from just the accommodation businesses and was answered by 20 respondents.

The following questions were developed to capture night stays and occupancy rates in the area.

The majority of respondents (18) reported that on average visitors stayed for 1 or two nights. Two respondents reported the average stay was three nights.

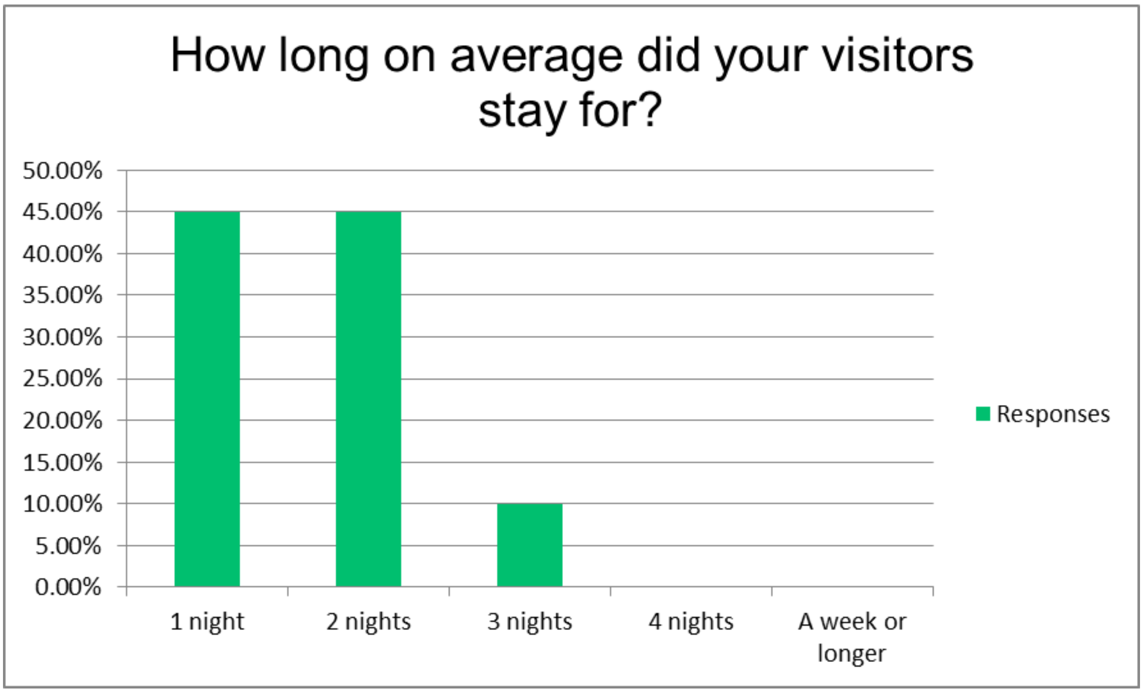
Compared to this time last year, the majority reported that occupancy levels were about the same. Four reported it had increased, while six reported it had decreased. When asked why a respondent thought this was, answers were varied and included:

- Upgrades and increase in marketing
- General increase or drop in visitation to the state.
- Air Bnb and unregulated accommodation properties etc.

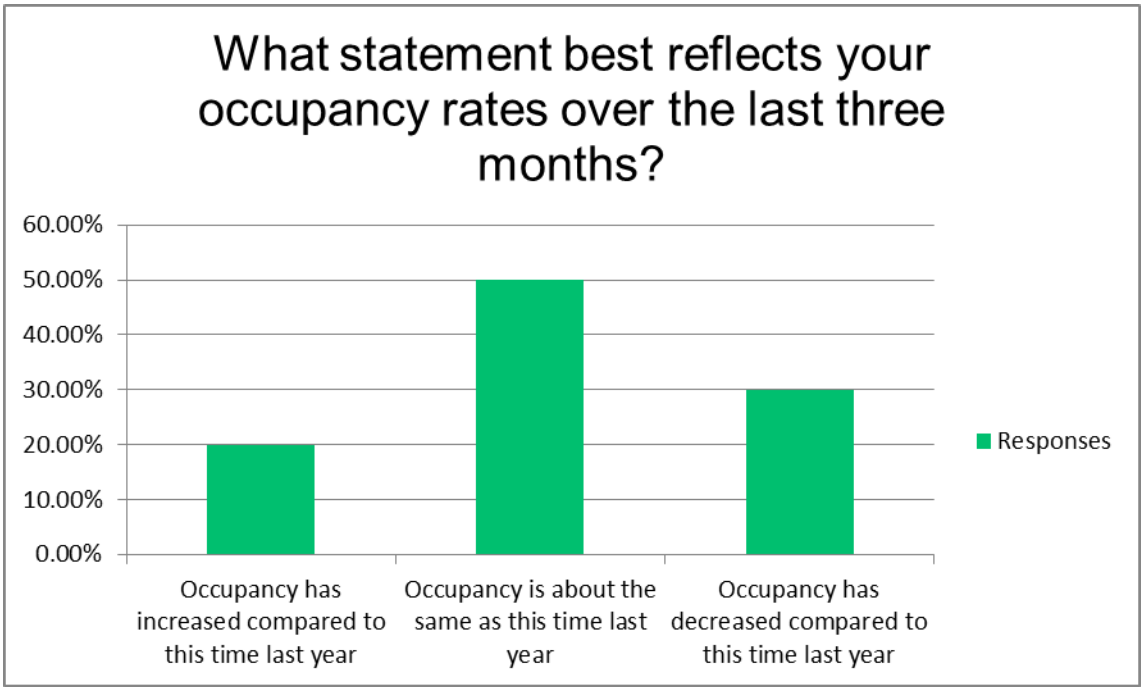
(As this was an open question there is no graph to depict this.)

To get more of an idea on what occupancy rates looked like at the time of the survey, Q17 asked accommodation businesses to quantify their present occupancy rate with a percentage. Almost one third of the respondents reported their occupancy rates at the time were between 5 and 15% and another third between 16-25%. Interestingly, three of the respondents reported their occupancy rates as being more than 50%.

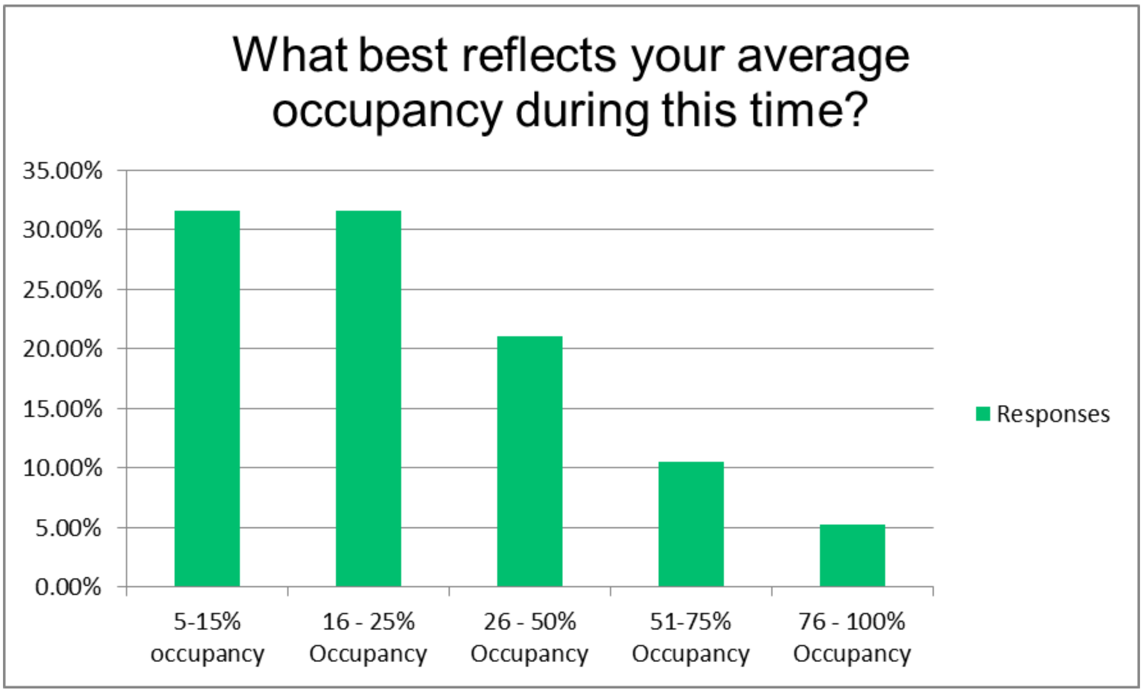
Q14



Q15



Q17



Conclusions

For the time of year that the survey was conducted, occupancy rates were low but with some businesses reporting more than 50% occupancy, we can assume that there is still interest in travelling to the East Coast during this period.

The night stays are however low and it is the goal of Council do what we can to get people to stay longer in our area.

Anything Further to Report

Q18

As this was an open question there is no graph to depict this data.

We received 14 responses to this question with the majority of which were feedback on the survey itself which we will consider for the next survey.