Business Survey

Summer 2021

Pic Credit: St Helens MTB

Date: December 2021

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 once a year.

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

The first survey was sent out to a business database of 132 with 48 Businesses responding. This is a response rate of around 36%, mostly from the St Helens area.

This year the survey was sent to a database of approx. 209 and was promoted in the local papers and newsletters. Unfortunately this survey only received 17 responses, this equates to aresponse rate of around 8%.

We believe that this was in part a result of survey fatigue. Since the pandemic businesses have been asked to complete a variety of different surveys. We can also assume that time may have been a factor as this survey was sent in peak season.

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. It also removes the potential for a biased interpretation of data.

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. Now that we have year on year data we are able to start examining trends and really understand the effect of the MTBnetwork on the Break O'Day business community.

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. Please get intouch with Council if you would like an individual report.

Previous reports and current links to surveys can be found on our website under My Community/Community Engagement.

Key Findings of this survey (December 2020 – February 2021)

- More than 50% of respondents experienced an increase in visitation
- Three fulltime positions and one casual position was created over the summer period.
- More than 80% of visitors stay for 1-2night
- There has been a slight increase in night stays from summer 2020 – summer 2021
- 25% of accommodation businesses reported an increase in occupancy over the 2021 summer period

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	6	(35.29 %)
St Marys/Fingal	5	(29.41%)
Beaumaris/Scamander	3	(17.65%)
Pyengana/Weldborough	0	(0.00)
Other	3	(17.65%)

Of the three 'Other' respondents - Two said they were based at Binalong Bay and one was classified as mobile.

Conclusion:

Previous surveys have shown a significant representation of businesses being located in St Helens, Summer 2020 survey found 64% of businesses were located in St Helens and 10.4% in St Marys.

This survey implies that businesses in St Marys and St Helens are comparable in number, however this data reflects an increase in businesses in St Marys taking part in the survey and a drop-off of St Helens businesses participating. It does not represent an increase in new businesses in the St Marys township.

Question 4: Email address

This was a new question asking businesses for their email addresses so we can add them to our business email database.

Where are visitors coming from?

Q5 and Q6. Regarding business growth when compared with the same time last year. Q7. The origin of visitors over last 3 months. Q8. Origin of visitors generally.

If respondents stated they had experienced an increase in business when compared to the same period last year for Q5, they were automatically sent to Q6 and Q7 and were asked where they thought this increase in visitation came from.

Over 50% of respondents reported they had noticed growth in their business when compared to last year. These respondents were then sent to Q6 and Q7 and were asked how big the increase was and where they thought this increase came from.

Of the nine respondents, a third reported they had experienced a small increase (1-10%). One business reported an increase of 41-50%. Of the other four businesses, two reported an increase of 11-20% and two an increase of 21-30%.

The majority of respondents (six) stated that this increase in visitation had come from Tasmania and a third said the mainland Australia.

Conclusion:

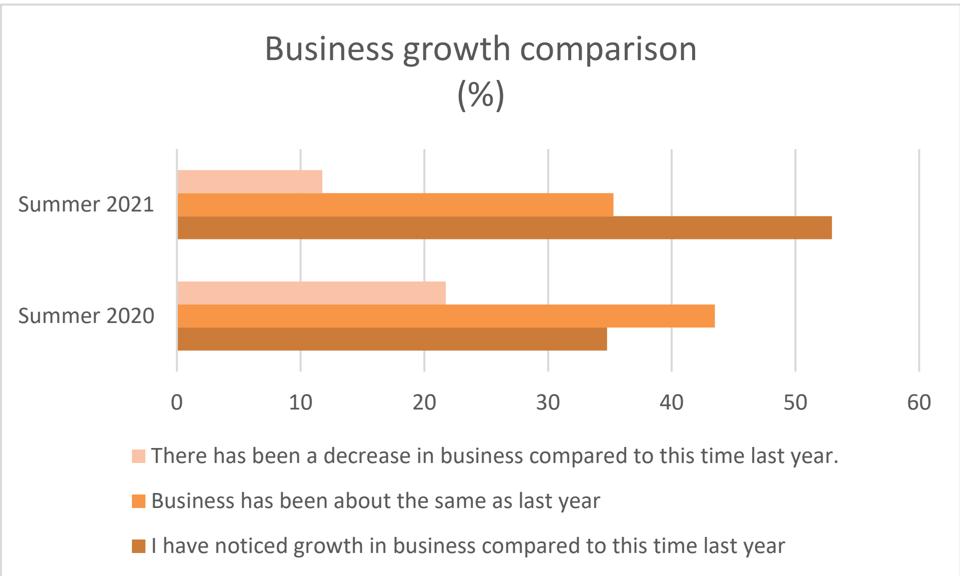
Due to the pandemic and the closure of international borders and state borders it makes sense that increased visitation was from the intrastate market.

Considering the impacts of the pandemic to the visitation market, it also makes sense that visitation did not increase dramatically.

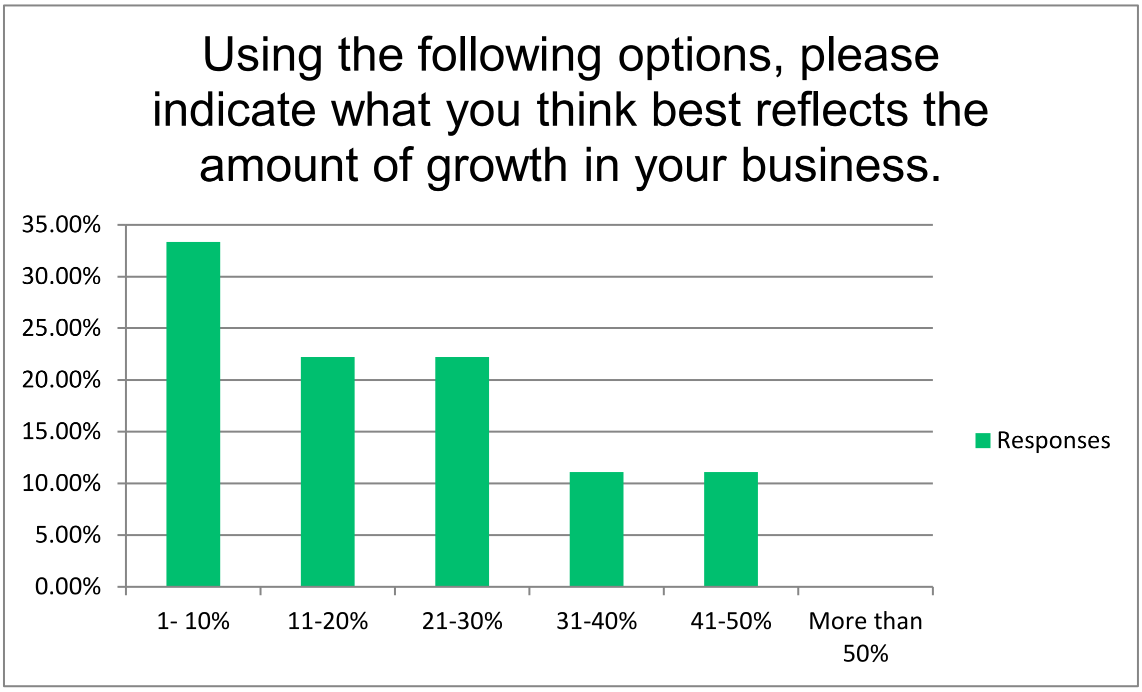
However, even despite these negative factors, more than 50% of businesses saw an increase in visitation.

Q5

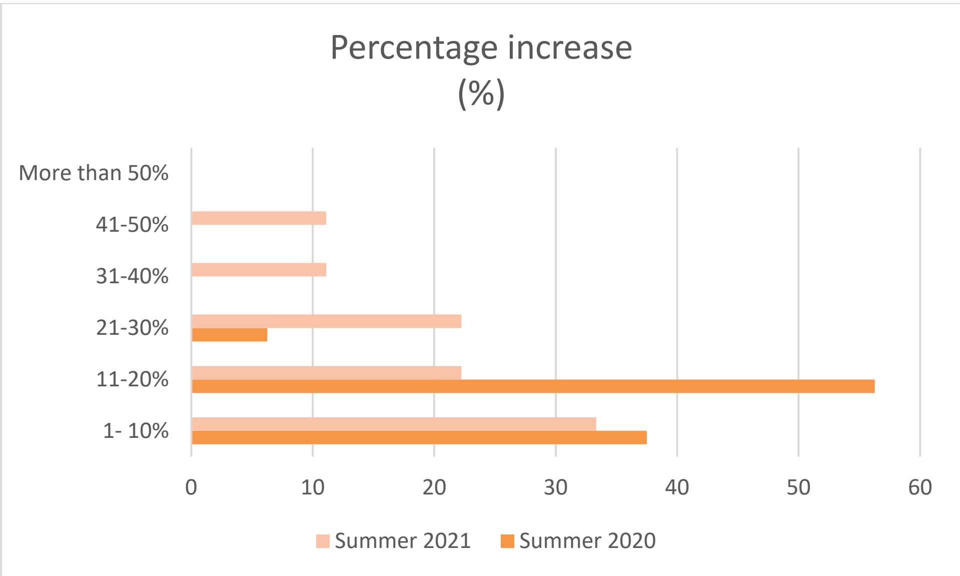
Comparison with February 2020 Survey



Q6

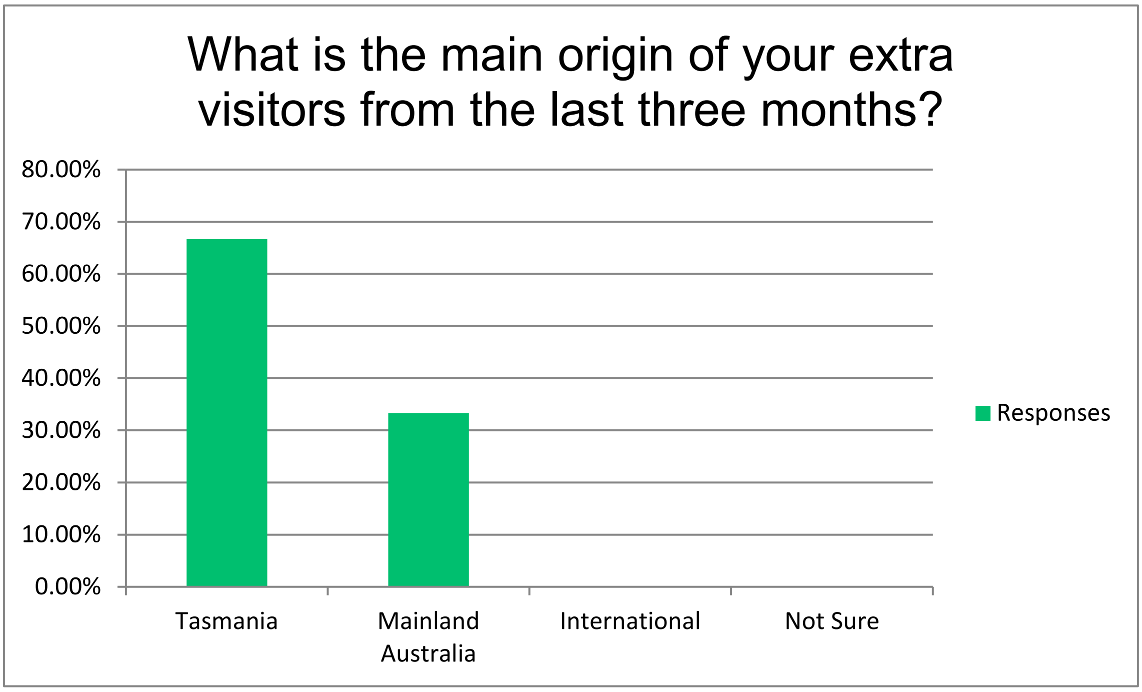


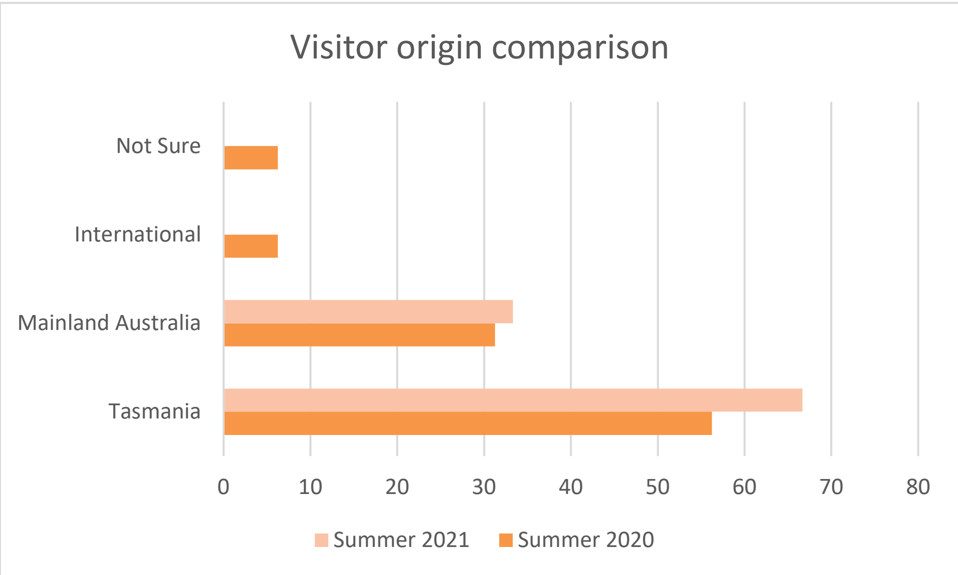
Using the following options, please indicate what you think best reflects the amount of growth in your business.
35.00%
30.00%
25.00%
20.00%
15.00%
10.00%
5.00%
0.00%
1- 10%
11-20%
21-30%
31-40%
41-50%
More than 50%
Responses



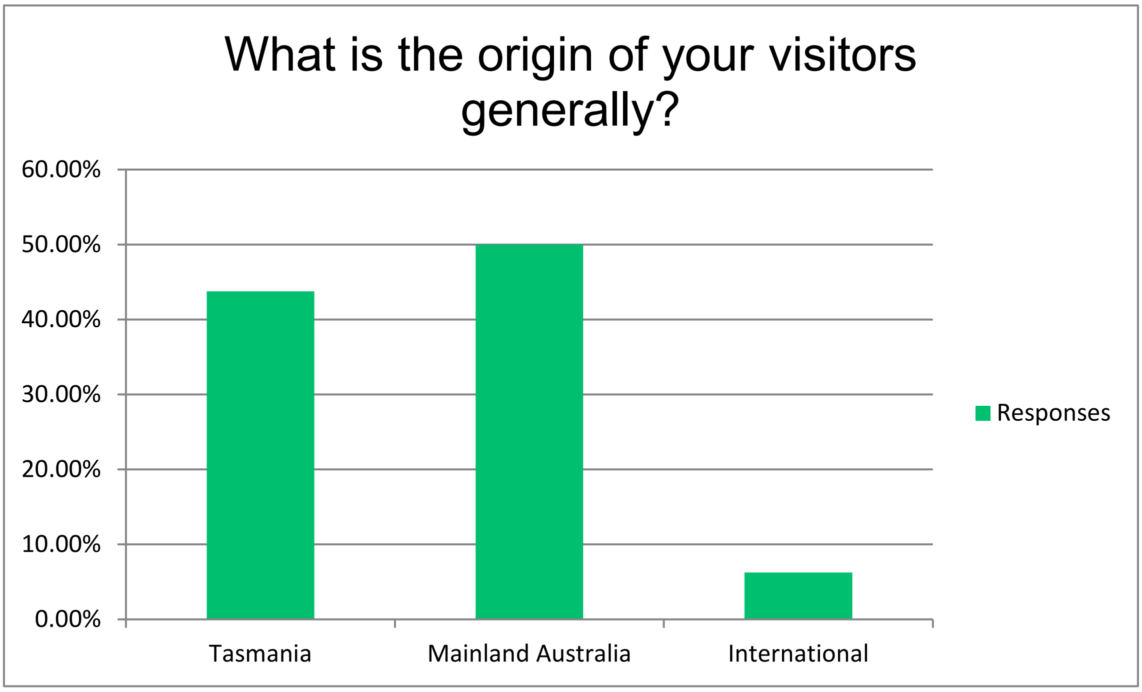
Percentage increase (%)
More than 50%
41-50%
31-40%
21-30%
11-20%
1- 10%
0
10
20
30
40
50
60
Summer 2021
Summer 2020

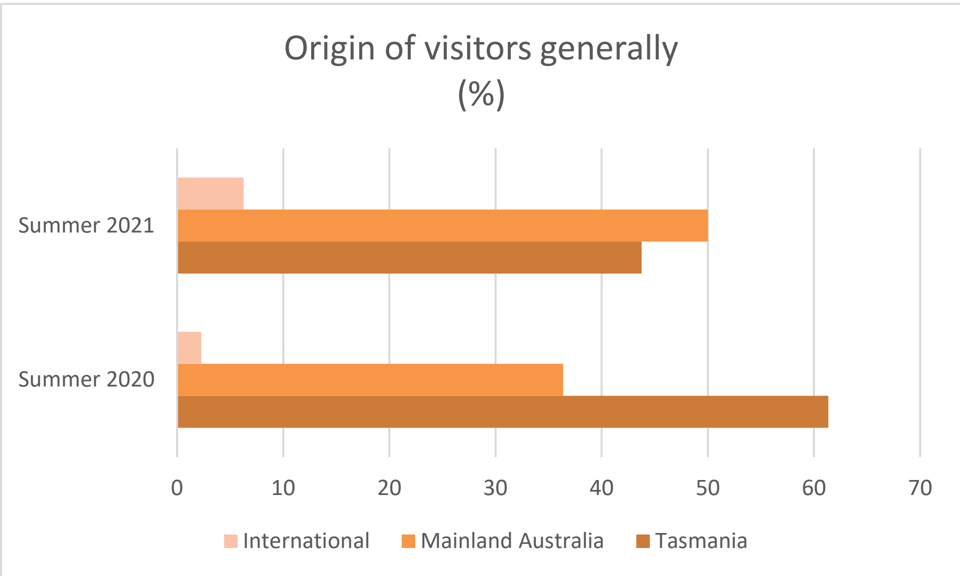
Q7


What is the main origin of your extra visitors from the last three months?
80.00%
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
Tasmania
Mainland Australia
International
Not Sure
Responses


Visitor origin comparison
Not Sure
International
Mainland Australia
Tasmania
0
10
20
30
40
50
60
70
80
Summer 2021
Summer 2020

Q8

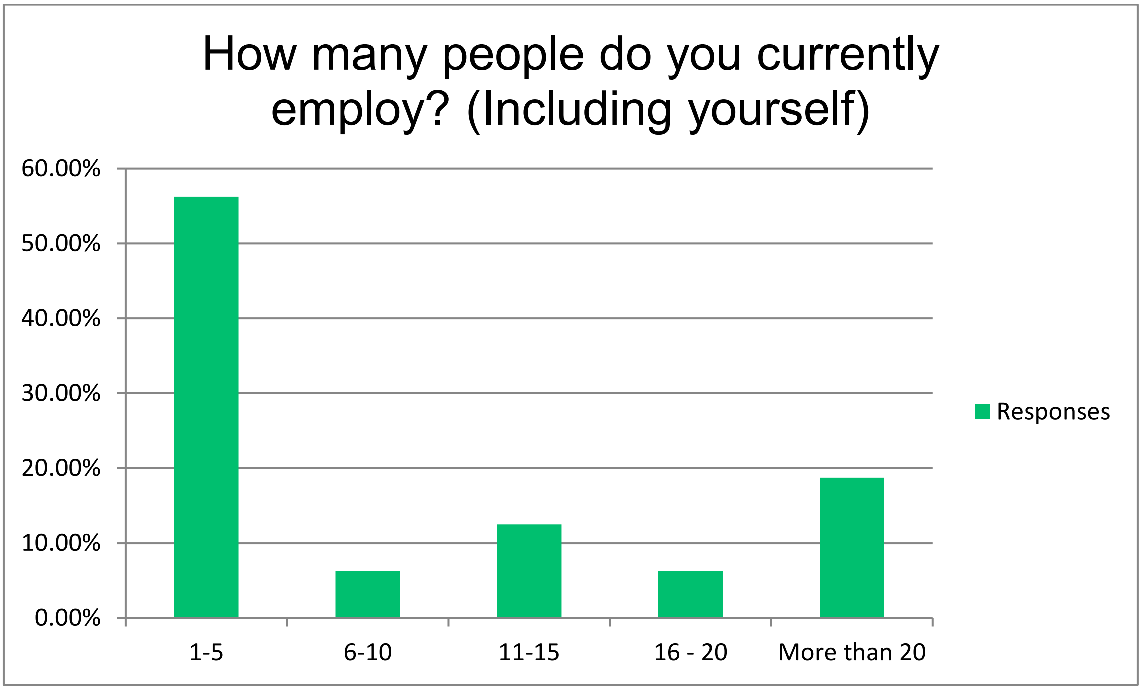

What is the origin of your visitors generally?
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
Tasmania
Mainland Australia
International
Responses

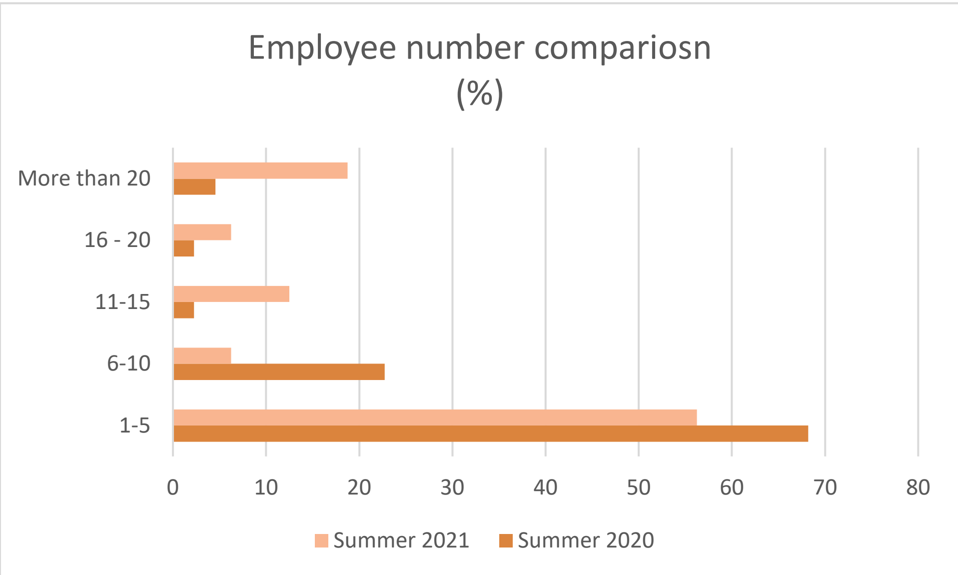

Origin of visitors generally (%)
Summer 2021
Summer 2020
0
10
20
30
40
50
60
70
International
Mainland Australia
Tasmania

Employment

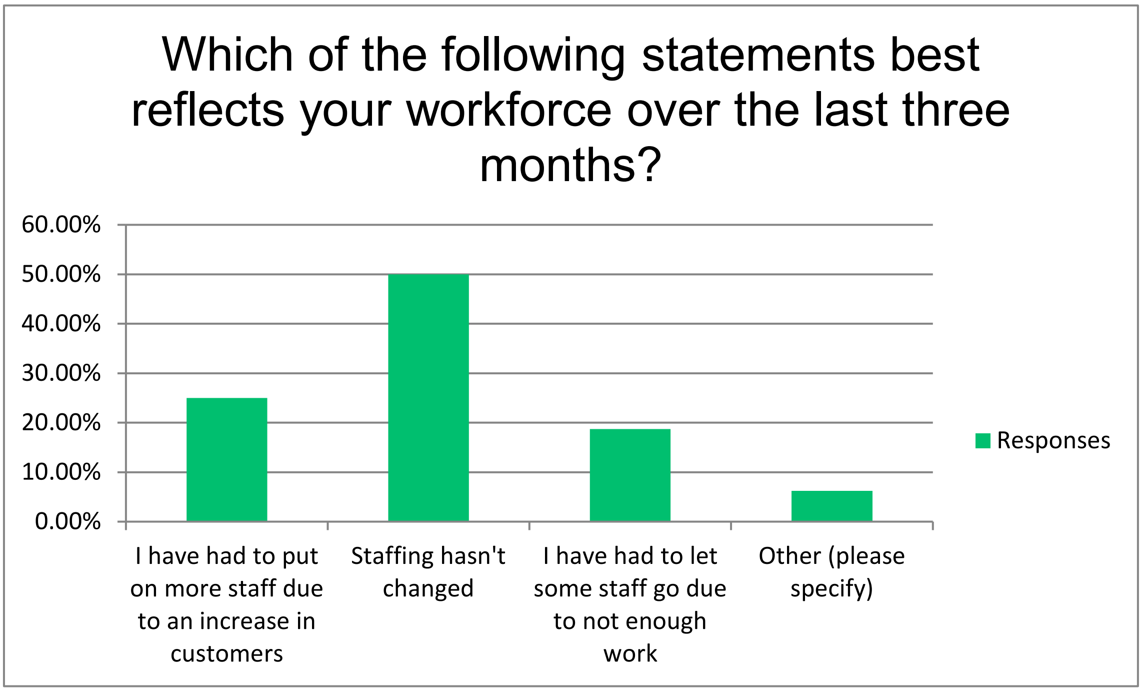
Q9. How many people do you employ? Q10, 11, 12 Increase, decrease or stableworkforce and FTEs.

Q9.

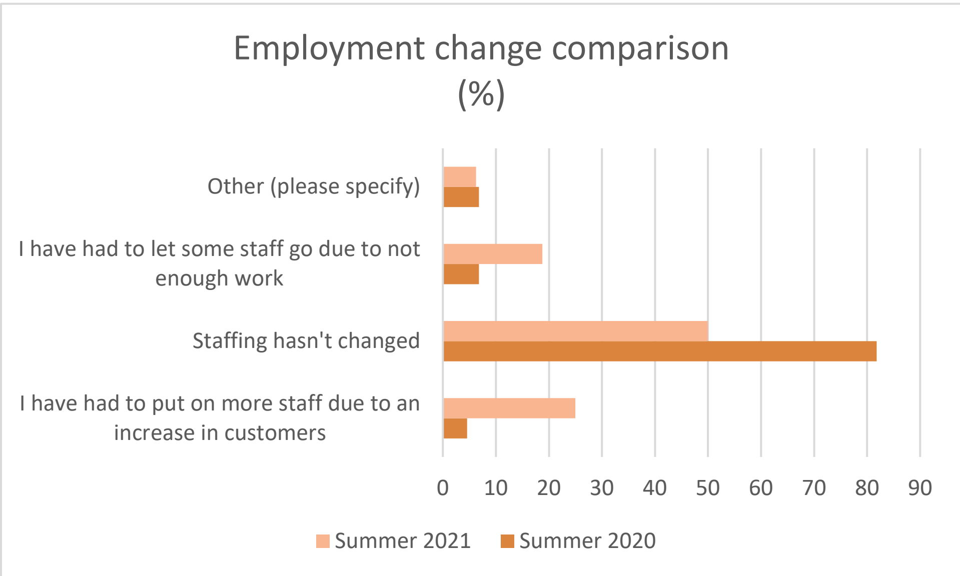




Q10.



Which of the following statements best reflects your workforce over the last three months?
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
I have had to put on more staff due to an increase in customers
Staffing hasn't changed
I have had to let some staff go due to not enough work
Other (please specify)
Responses



Employment change comparison (%)
Other (please specify)
I have had to let some staff go due to not enough work
Staffing hasn't changed
I have had to put on more staff due to an increase in customers
0
10
20
30
40
50
60
70
80
90
Summer 2021
Summer 2020

Q11.

During the survey period, two businesses reported they had employed 2 new staff, two reported they had employed 1-3 people. Four respondents skipped this question.

Compared to the previous summer survey this is an increase in staffing for the period.

Question 12.

Four respondents answered question 12 which asked for the Full time equivalent of the new positions created in the three months of the survey.

In total there were 3 full time equivalent positions created plus one casual position of 3hrs per day. Summer 2020 survey resulted in 1 Full time position and one part time.

Conclusion

Small businesses employing 1- 5 people make up the majority of businesses in the Break O'Day region.

Considering the impact of COVID on visitation illustrated in this survey data, there is no surprise that we have not seen employment levels increase.

Five businesses responded to 'Other' to putting on staff, broken down the responses were in relation to seasonal workers and having a partner who was able to help out when it got busy.

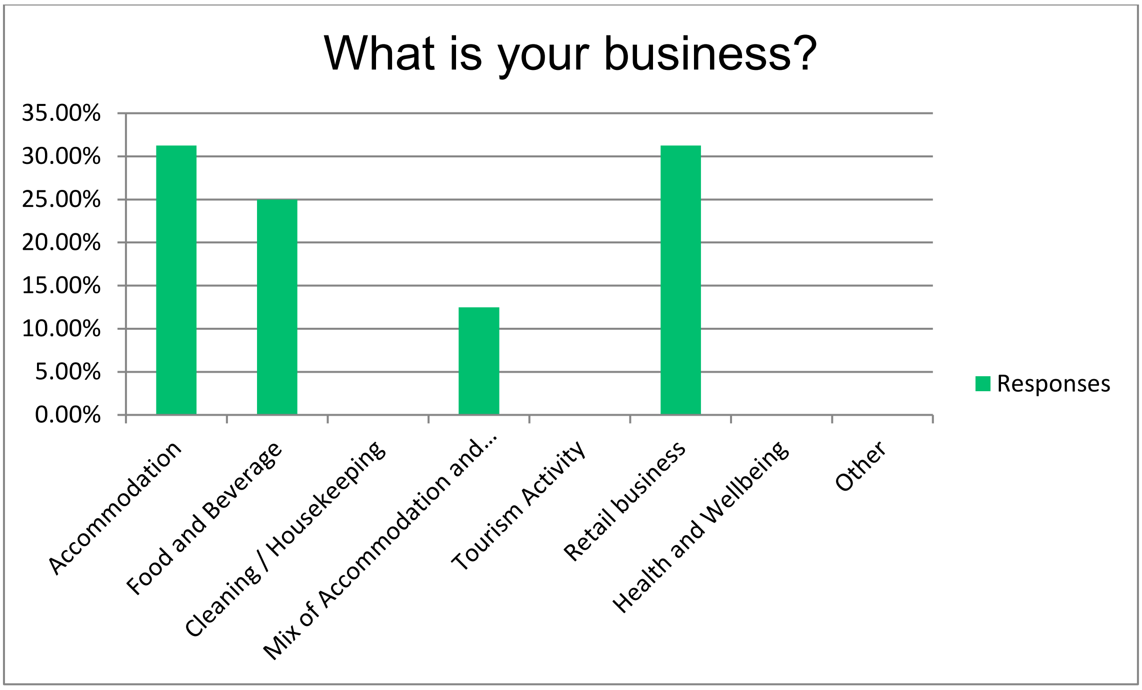
Business detail

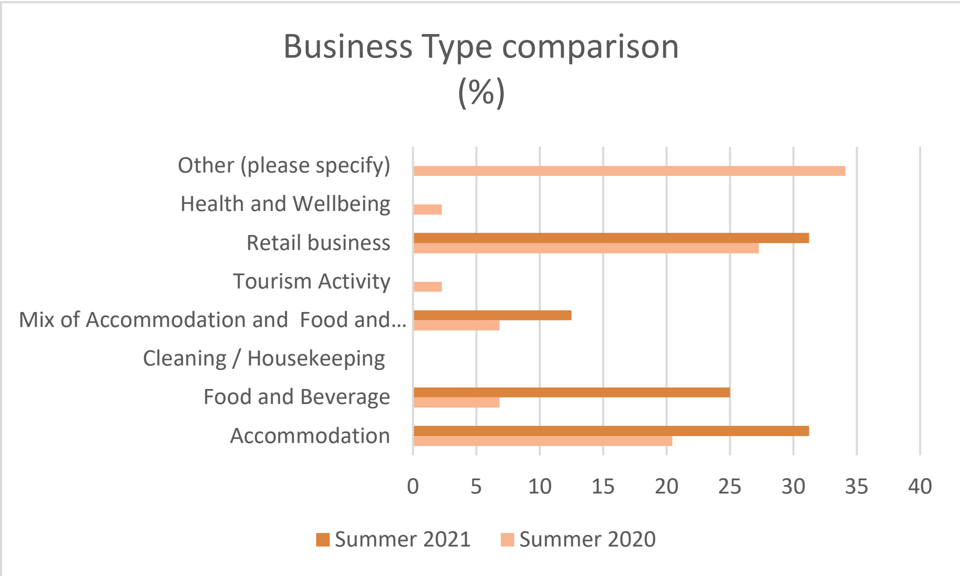
Q13 Type of business

This question was designed to single out accommodation businesses so that we could gather a bitmore information about night stays. After feedback from the previous survey we also added the categories Cleaning/Housekeeping and Health and Wellbeing. The results for this question are as follows.

- Accommodation 31.25%
- Food and Beverage 25.00%
- Cleaning / House Keeping 0.00%
- Mix of Accommodation and Food and Beverage 12.50%
- Tourism Activity 0.00%
- Retail Business 31.25%
- Health and Wellbeing 0.00%
- Other 0.00%

Q13





Conclusion

Although there were less respondents to the survey this time, business types have remained largely the same when compared to the previous survey with the majority being Food and beverage, accommodation, a mix of both and retail.

Accommodation

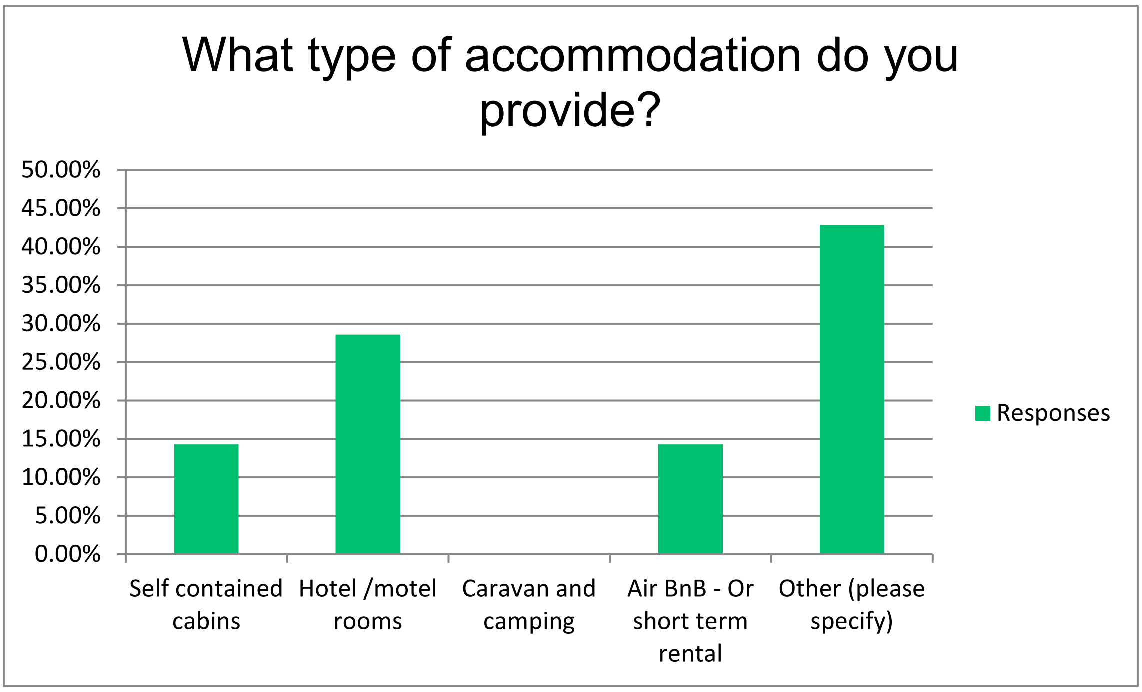
Q14, What type of accommodation do you provide?

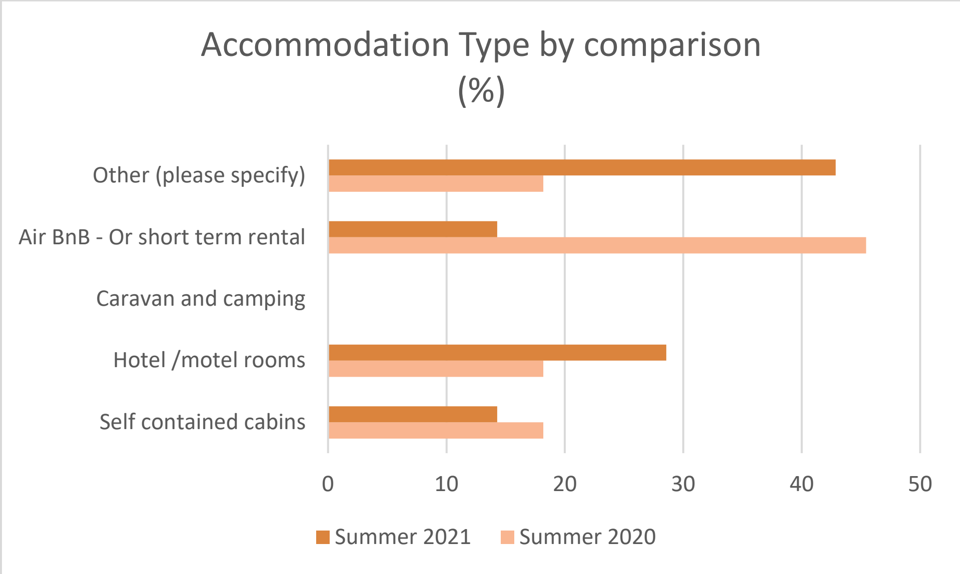
The following data was collected from just the accommodation businesses and was answered by 11 respondents, down on the previous survey which had 20.

Q14 asked the respondent to specify their accommodation business. Based on feedback receivedfrom the last survey, a new category was included, caravan and camping.

- 14.29% self-contained cabins
- 28.57 Hotel / motel rooms
- 0.00 Caravans and Camping
- 14.29% Air BNB
- 42.86% Other

Q14





Conclusion

There were seven respondents to the accommodation questions with three selecting 'Other when i identifying types of accommodation. Of those that stated other, one was glamping, one was a guest house with dining options and the third was self-contained cabins, caravan and camping.

When this data is compared with last year it implies there was a drop in accommodation provision however, this can be attributed to less respondents to the survey.

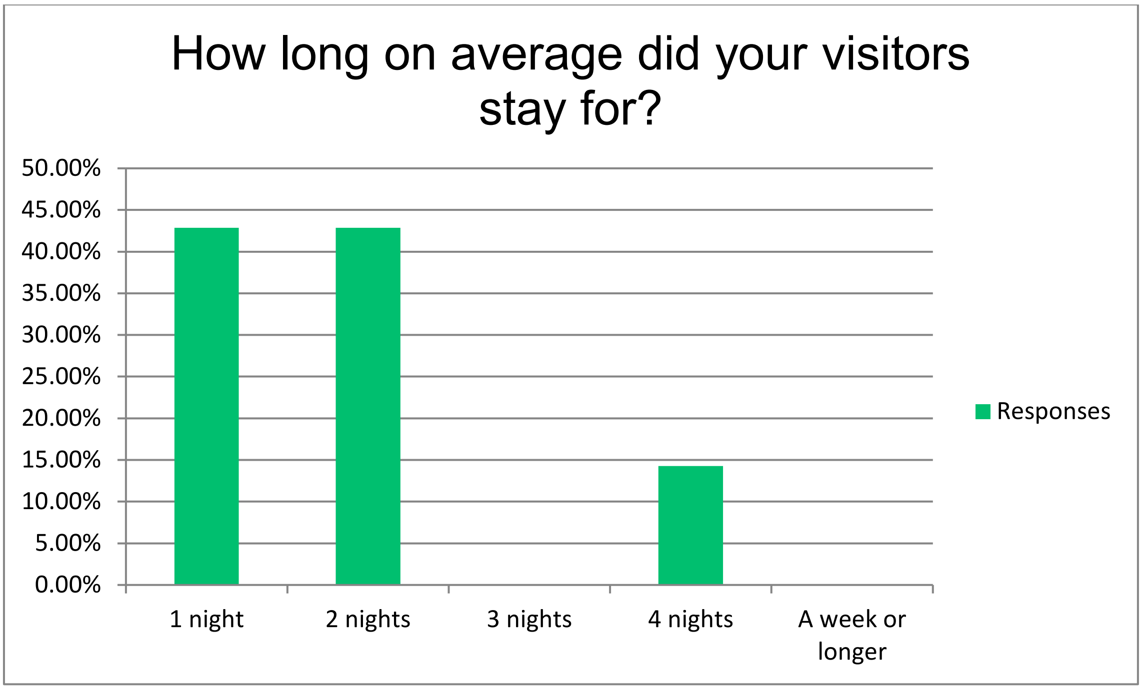
The other interesting thing the data implies is that there was a drop-off in Air BnB accommodation, however, again this can be attributed to a general drop-off in respondents to the survey.

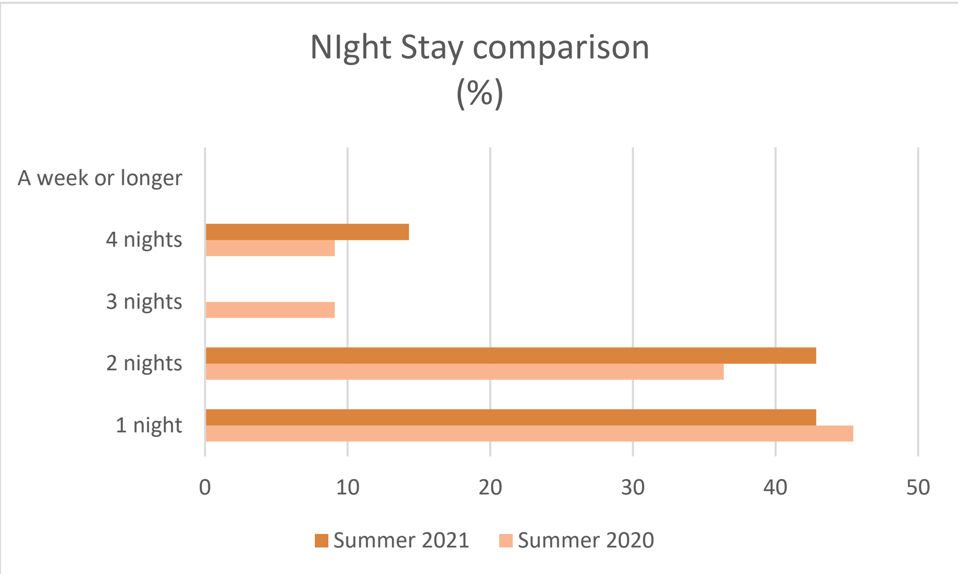
Night Stays

Q15, Q16, Q17 and Q18

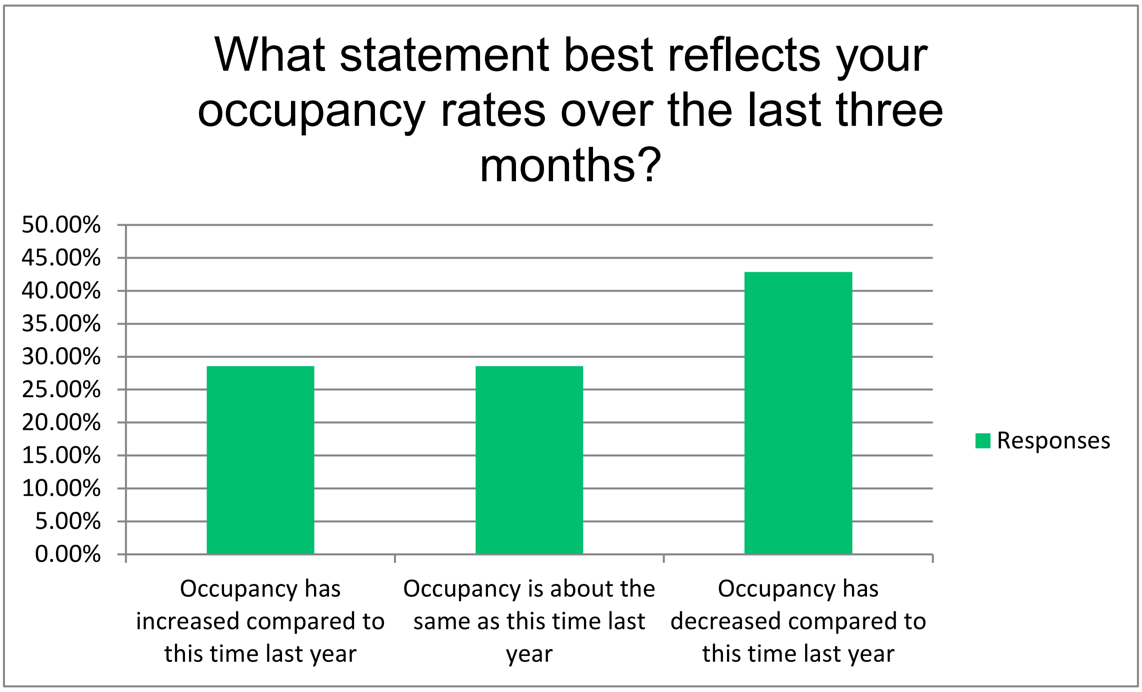
The following data was collected from just the accommodation businesses and was answered by seven respondents.

Q15

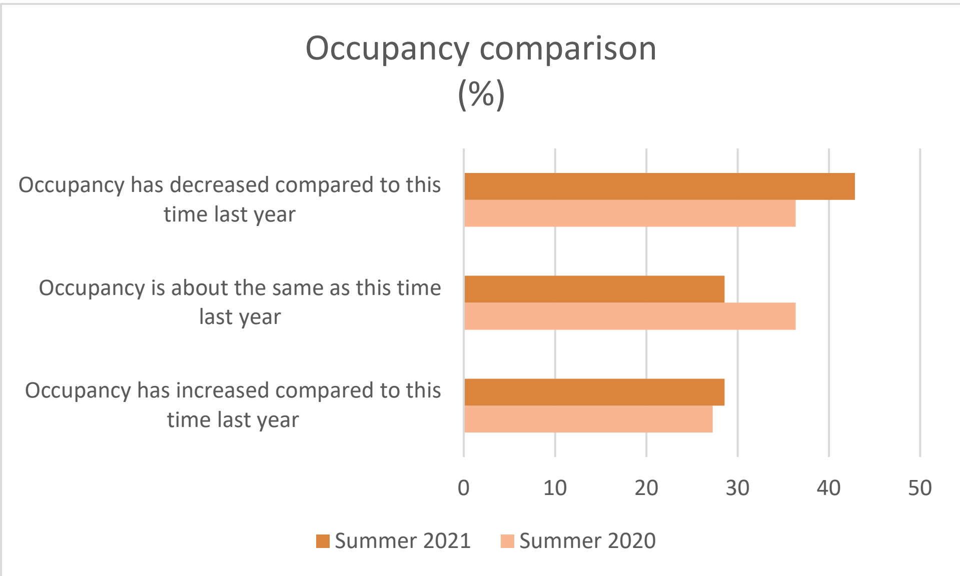




Q16



What statement best reflects your occupancy rates over the last three months?
50.00%
45.00%
40.00%
35.00%
30.00%
25.00%
20.00%
15.00%
10.00%
5.00%
0.00%
Occupancy has increased compared to this time last year
Occupancy is about the same as this time last year
Occupancy has decreased compared to this time last year
Responses



Occupancy comparison (%)
Occupancy has decreased compared to this time last year
Occupancy is about the same as this time last year
Occupancy has increased compared to this time last year
0
10
20
30
40
50
Summer 2021
Summer 2020

Q17.Why do you think this is?

This question asked respondents to consider why their occupancy rates may have increased/decreased. Five respondents answered this question and 12 skipped. Four out of five respondents identified COVID as the reason for a decrease in occupancy.

Conclusions

Of the seven accommodation businesses that answered these questions, around 42% stated that they had experienced a decrease in occupancy over the summer period, this is slightly up on the previous year with 36% reporting a decrease. This can be attributed to the effect of the pandemic and decrease in visitation generally.

The data clearly shows that the majority of visitors (more than 80%) are staying for 1-2 days.

Unfortunately, due to the low return rate of this period's survey, it is difficult to draw solid conclusions as when looking comparatively, the data still shows a clear increase in occupation of more than 25% over both periods.

Other than occupancy, one of the key indicators that show growth in visitation is the night stays and over the 20 and 21 summer periods we can see that night stays have slightly increased.

Anything Further to Report

Q18

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

We received 10 responses to this question. Generally comments were all positive and went in to detail about how their business dealt with COVID and increase in customers. Eight of the comments can be deemed positive with two negative comments.

All were positive comments on the trails and discussed that while the Easter period was slow due to COVID-19 lock down, the winter period saw the returnof Tasmanians in droves which bolstered business lost over Easter.

Both negative comments were deemed invalid as they did not reflect anything to do with the survey.