METHODOLOGY

Project Team

The Chamber of Commerce organised the implementation of the survey and appointed Kim Rosen (Chamber Executive Officer) and Carol Kelly (Tourism and Sales manager of the new Project Office) to job share the project. The various tasks were divided between the two, with Carol undertaking the distribution and collection of surveys and data entry (with the assistance of the project office team) and Kim Rosen undertaking the data analysis and report writing.

Survey design

Ten supplementary questions were designed to extract more data relevant to the town. The survey was advertised in the media, via Chamber meetings and email and in the monthly Chamber newsletter.

Survey implementation

Questionnaires were delivered personally to 100 local businesses, out of the 120 or so businesses in town. A few home businesses were included in the sample, and Brunswick market stallholders were excluded. Several businesses indicated up front that they would not be completing the survey - couple businesses felt that the survey as too invasive of their privacy and some indicated they were just too busy. A few businesses returned their completed surveys very promptly, but most required a couple of reminders. Many businesses required numerous visits for a successful pick up. A special effort was made to obtain surveys from the larger businesses.

A total of 66 completed surveys were collected, yielding a very pleasing response rate of 66%. This was a higher response rate than from the 2000 survey (49%) and the 2003 survey (60%) and well above rates for BRE's by other towns in the Shire some years ago.

Brunswick Heads business people are kept well informed by the pro-active Chamber of Commerce, through its hand delivered regular monthly newsletters, which are distributed to non-members as well. The business community is also used to being approached to contribute to the many town projects and the survey organisers were familiar faces to most.

Analysis

Initially the data was analysed using the BREP software program. Extra valuable information and insights were gained by comparing data from this survey with data from the 2006 database of town businesses and the 2003 BRE survey. A meeting of the Chamber's Project Committee was held to discuss the results and their implications and to make recommendations for the report.

Reporting

A report and executive summary was produced for a presentation on December 7th. The report summary will also been posted on the website: www.brunswickheads.org,au.

Hard copies of the full report will be available to participating businesses through the Chamber of Commerce. The Report will also be kept as a useful resource for those investigating the possibility of setting up a new business in town.

THE RESULTS

1. PROFILE OF BRUNSWICK HEADS BUSINESSES

BUSINESS OWNERSHIP

A significant number of businesses surveyed (84%) are independently owned, with only a small number of national networks (6%), franchises (3%), businesses associated with another business (2%) and other (2%). The very low number of franchises in Brunswick Heads is expected, as the strong turnover required for franchise operations is not there. These figures are almost exactly reflect the breakdown in 2003.

BUSINESS STRUCTURE

The most common business structures are companies (32%), partnerships (27%), and sole traders (27%), with only a few trusts (5%) or other structures (5%). The company structure is 5% higher than for 2003 (27%).

AGE OF BUSINESSES

Well-established businesses of more than 10 years (pre 1996) account for a 23% of respondents. These established businesses have traded through the tough times pre 1996. 21% have been in businesses for between 6 and 10 years, starting up between 1996 and 2000, just as the town was moving into a period of economic renewal.

A significant number (51%) of existing Brunswick Heads businesses are "new", that is, were started up in the last 5 years (2001-2006).

During the last 3 years we saw more businesses relocating from elsewhere than in the previous 3 years. 18% of respondents (12 businesses) indicated they relocated from Billindudgel (3%), Byron Bay (2%), Ocean Shores (3%), elsewhere in town (2%) and Sydney (3%), as opposed to only 5% in the previous 3 years.

Comments

This would suggest that showcasing of Brunswick and the cautious optimism expressed in the previous BRE survey had an impact on Brunswick's desirability as a place to run a business. In the last year alone 9 new businesses have started up in Brunswick. While not formally evaluated, it is of interest to note that of the 34 businesses which started up within the last 5 years, a large proportion are owned or managed by women.

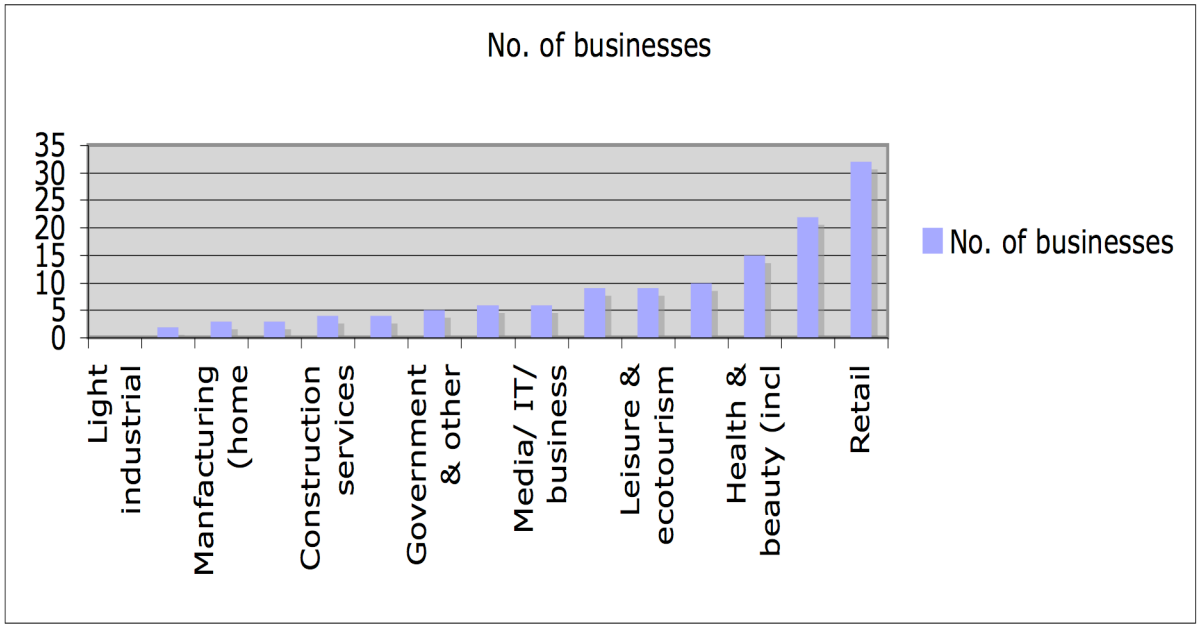
BRUNSWICK BUSINESS TYPES

The 66 businesses involved in the survey were categorised according to their products or services. A much more accurate picture of the make up of business in the town is gained, however, from the Chamber's up to date list of 128 businesses and two Government agencies currently operating in Brunswick. (This list includes a few home based businesses)

These 130 operations fall into the following categories:

	2003	2006
Retail (x of which are food related)	29 (7)	32 (9)
Health & beauty (incl alternate health & healing)	17	15
Hospitality (cafes, takeaways, clubs & pubs)	16	22
Accommodation (+ x holiday houses)	10 (+35)	10 (+40)
Professional (accountants, solicitors, insurance, bank)	6	9 all in same street
Media, IT, graphics & business services	9	6
Auto related (mechanics & fuel)	5	6
Government & other employment services	3	5
Real estate & strata management	5	4
Other services	4	3
Construction/trades	4	4
Manufacturing (all fashion)	3	3

Educational services	2	2
Light industrial (new shipwright)	1	1
Leisure and ecotourism	NA	9(Bootcamp, fishing charter, Boat hire, sea kayak tours, gym/squash/pool, pottery drumming, astronomy, mountain bike tours



Comments

The make up of the Brunswick Heads' business sector is fairly typical of a coastal town, with an almost non-existent industrial and manufacturing base and a strong tourism, retail and hospitality focus. However, over the last 3 years we have seen a notable increase in the number of eateries and food outlets and also local and tourist oriented recreational based businesses. The number of health and healing businesses has not increased in quantity but in size and diversity. The above combination has formed an "R and R" cluster for both locals and tourists.

Retail

The retail fashion sector continues to expand, with three shops opening up in the last two years. Antique and second hand furniture, second hand clothing and bric a brac are well represented in the town by six businesses, two of which are non-profit. A contemporary aboriginal art gallery has also opened and less than a year ago in the same building two homeware/furniture emporium style businesses opened next door to each other. One in particular has captured the interest of both local and tourist customers with their eclectic nostalgic style. While gift shops per se have disappeared from the scene many of the retial shops are supplementing their range with small gift items. For example greeting cards, previously only found in the Newsagent and post office have suddenly emerged in clothes, furniture and beauty shops, as some retailers tune in to and respond to gaps in the marketplace and adapt their product range. Also notable is the recent expansion of internet café facilities within the video shop and the library.

Accommodation

The accommodation category statistics are not reflective of the extent of tourist accommodation in the town. In addition to the hotel, three motels, three caravan parks and one boutique accommodation provider, there are approximately 40 holiday houses of varying standards, managed by the three of the local real estate agents. Inclusion of this data would place accommodation high above retail as the predominant type of business. Since 2003 we have lost one of the larger motels (ie 25% of motel beds) and a small ova night accommodation facility. No doubt as a result of this loss, landlords have

seen an opportunity and have transformed two permanent medium density residential premises(8) into 9 holiday accommodation apartments, and four permanent homes or flats into holiday accommodation.

Food

Food outlets, including cafes, restaurants, takeaways, the hotel and the bowling club represent a significant hospitality segment. This segment has grown substantially once again not so much in number, but in size and quality in the last three years. About half of the current establishments are new operators. This number of new cafes and restaurants will remain static for some years, regardless of demand, as no more DA's for cafes or takeaways will be approved by the Byron Shire Council until the lifting of the sewerage moratorium, now possibly pushed out until 2010.

Health and well-being

Following behind hospitality is the health, beauty and well-being sector, with an influx of new small complimentary health providers in recent years making up a significant number (6) of these. The town continues to sustain a large number of hairdressers and beauty salons, some of which have expanded. Last year two merged to become a business larger than sum of the two original businesses.

Leisure and Eco-tourism

The most significant change since 2003 has been the emergence of a budding leisure and eco-tourism sector, which was very limited in 2003. Brunswick now offers boat & canoe hire, fishing charter, whale watching trips, Kayak tours and a new sea kayaking operation (which is having difficulty getting one of the 5 scarce licences), gym/squash & pool, a bootcamp on the beach (which has expanded since its introduction in February, mountain bike tours and bike hire, a pottery workshop, star gazing and Samba Blisstas drumming workshops. Although not commercial, the Brunswick Boardriders club has been formed to complement the leisure scene.

Fishing

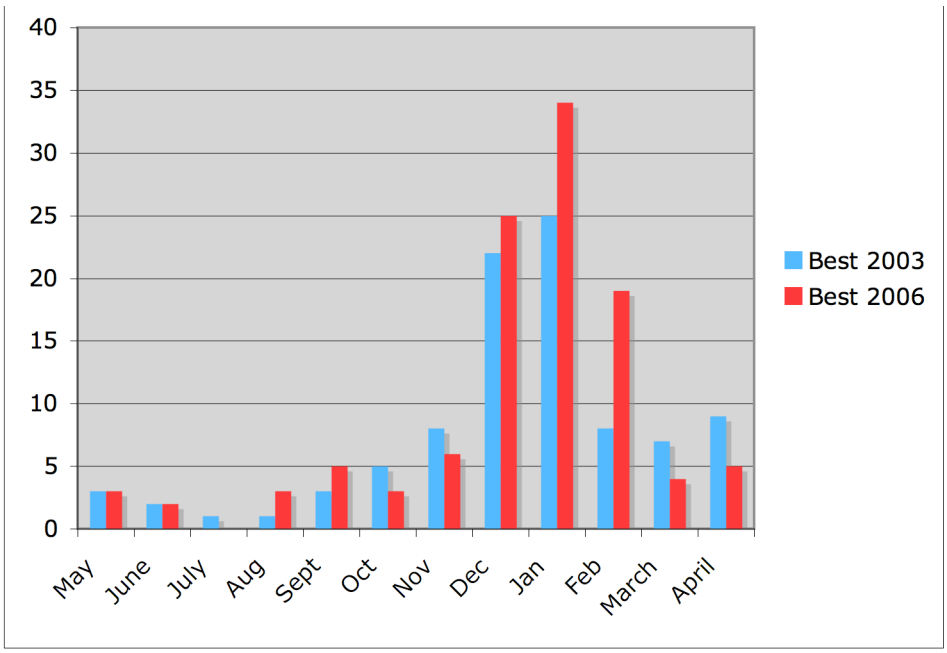
The silting of the river and bar with restricted access in and out of the boat harbour is a major factor affecting the viability of commercial fishing. Once a thriving fishing industry, the Brunswick fishing fleet is down to about three fishing boats, and much of the fresh fish sold at the Co-op is brought in from elsewhere. The Fishing Co-ops under new management and minor renovations to their building to provide an al fresco dining experience for patrons is being undertaken to meet demand.

Government and other employment services

Centrelink still retains its offices in Brunswick Heads, despite falling staff numbers and an uncertain future. However it is interesting that several other employment providers have moved in to town. In addition to larger providers, Commonwealth Rehabilitation Service, TURSA, a new International Recruitment Agency has opened up and two part time providers offer specialised placements from the Project Office.

Industrial & manufacturing

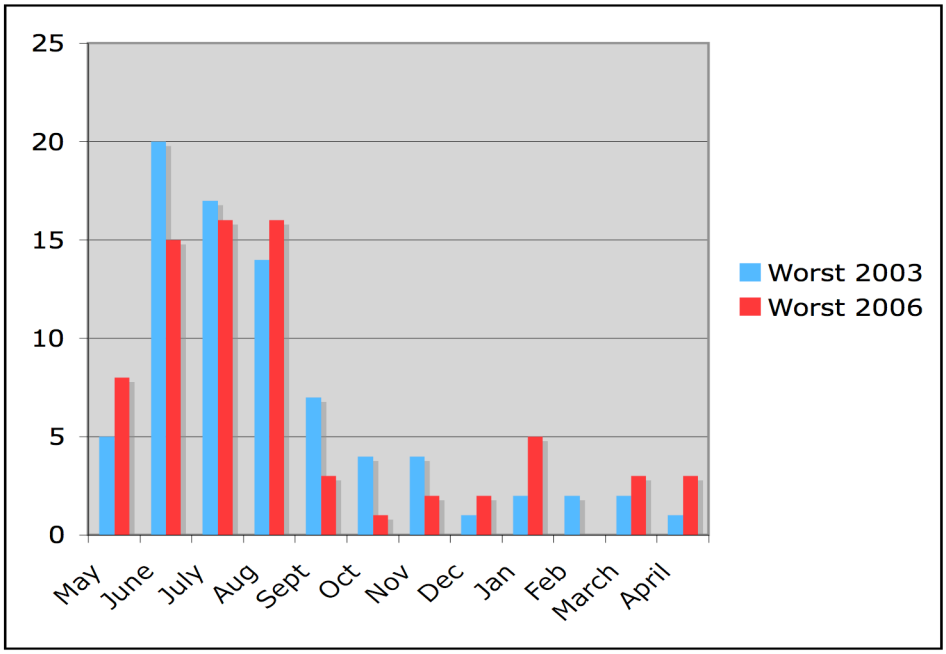
The only industrial activity is a new shipwright business and the manufacturing businesses cover small one person clothing, jewellery & leathergoods operations. Brunswick Heads has no industrial zoned land, other than a small parcel occupied by Bashforths (an earthmoving business). The town of Billinudgel to the north is considered to be Brunswick's industrial area.



TRADING TRENDS

Related to this information is a picture of the town's best and worst trading months.
78.8% of those surveyed responded to this question. A large number of businesses listed nominated more than one month and many several months eg "summer" or "winter."
10.6% of respondents reported either no pattern or no discernable difference in trading throughout the year. Another 10.6% did not answer the question.
In making the comparison between 2006 and 2003, it is to be noted that there were an extra 6 businesses involved so that the height of the steepest curves for 2006 should be adjusted slightly.

Best trading months



Data from this survey suggests that December and January are still by far the best months for most (but not all) and that the good trading season has now been extended out to February. and the July – August period is still the worst for most. It is encouraging, however to see, however, the number of businesses that are experiencing good times also in November, February, March and April.

Worst trading months

There has been a shift in the worst trading months from June and July in 2003 to July and August in 2006, although June is still not far behind. In addition, a few of the local professional based businesses do not fare so well in January, which is not surprising.

PRODUCT DISTRIBUTION

Brunswick Heads businesses largely supply the Byron Shire, with 74% of businesses surveyed indicating that they sell more than 50% of their products locally. However this is a 10% drop in local product distribution since 2003, with 17% of businesses selling 20-50% of their products elsewhere in NSW and 12% selling 20-50% of their products to elsewhere in Australia (most likely over the border). their products elsewhere in NSW, a noticeable rise from 2003. There is still a negligible sale of products overseas (with only 2% of businesses selling more over 20% of their product).

SOURCE OF RAW MATERIALS

The percentage of businesses sourcing more than half of raw materials locally (53.6%) has doubled since the 2003 survey (27%) providing a significant flow on benefit to the area from "the multiplier effect". 36.5% of businesses source more than 50% of their raw materials from elsewhere in NSW and 29.2% from elsewhere in NSW. Many businesses have an even spread of raw material source within Australia. While only 7% of businesses who responded source more than 50% of their raw materials from overseas, quite a large number of businesses (24.4%) source a small percentage of their raw materials from overseas, which is up on the previous survey of only 7%. ??Now, as in 2000, the main barrier for greater local sourcing of locally materials is lack of availability.

DEMAND EXPECTATIONS

The outlook for business trade in the town is positive with 74% of businesses expecting increased demand for their products or services in the next 2 years (compared with 72% in 2003). A further 20% expecting the demand to stay the same. Only one business expects the demand to decrease due to improving employment opportunities, which, in itself is a positive sign. (The remaining 5% did not answer the question.)

Reasons for optimism

Some believe that the local and regional population base is growing (although we are yet to see if this is substantiated by the latest census statistics.) The relaxed Brunswick lifestyle is very sought after, and baby boomers are moving north to live or holiday and we are now trapping into to the Tweed Coast area. In general, businesses believe that more holiday makers will choose Brunswick, due to its growth of reputation by word of mouth and referrals, higher profile, easier town access, improved services and facilities, consistent good service and the best prices and selection in the area.

Many business owners are planning for continued increases patronage and are pro-actively responding to the changing market and demographics, to meeting the demand for quality food, coffee, interesting accommodation and interesting and nostalgic goods. Several locally oriented businesses are buying new equipment to gain greater market share, staying abreast of up to the minute training or responding to government legislation. Some are actively involved in marketing and expect business growth as a result. A large number of respondents are just optimistic and expect natural business growth. Several suggest that because they provide excellent service and are good at what they do, repeat business and word of mouth referrals will follow.

Reasons for expecting demand to remain the same

- They are in a stable industry
- Property market stability
- No imminent land release
- Increased competition

NEW BUSINESSES SUGGESTED FOR BRUNSWICK

Businesses were much more forthcoming in this survey than the 2003 survey with their suggestions for new businesses which would compliment or enhance the town. Several suggestions on the 2003 wish list actually became reality during the last 3 years

- Surf shop (one is opening before Christmas)
- Book shop with coffee
- Unusual homewares
- Gift shop
- Kids shop (clothes and toys)
- Tourist information (has been on the wish list since 2000)
- Auto transmission (one currently has to go to Ballina or Murwillumbah)
- RTA office (one currently has to go to Ballina or Murwillumbah)
- Backpackers hostel

Professional
- More medical practitioners
- More employment service providers
- More banking or a credit union facilities x6

Retail
- Hardware x4
- Keycutting x2
- Homewares x2
- Stationery etc shop for businesses
- Pet shop

Tourist related
- More tourist accommodation x2
- Bigger and better accommodation
- Ecotourism businesses x2
- Interesting businesses that cater for daytrippers/tourists eg in Bangalow or mall specialty shops with a difference eg art, dining, clothing x2, ribbons, chocolate shop x3
- Antique or 60's type businesses

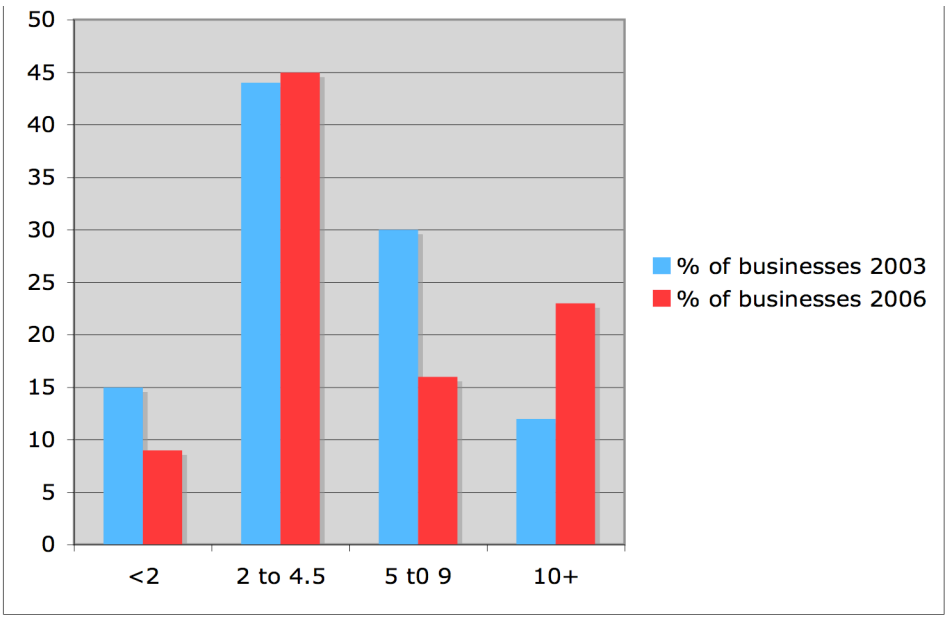
Food & hospitality
- More restaurants
- Patisserie x3
- Late night food & entertainment – winebar

Other
- Eco-friendly businesses
- Aged care facility
- Cinema Fri & Sat nights x2
- Car rental
- Boat industry, sailing club

B. EMPLOYEES

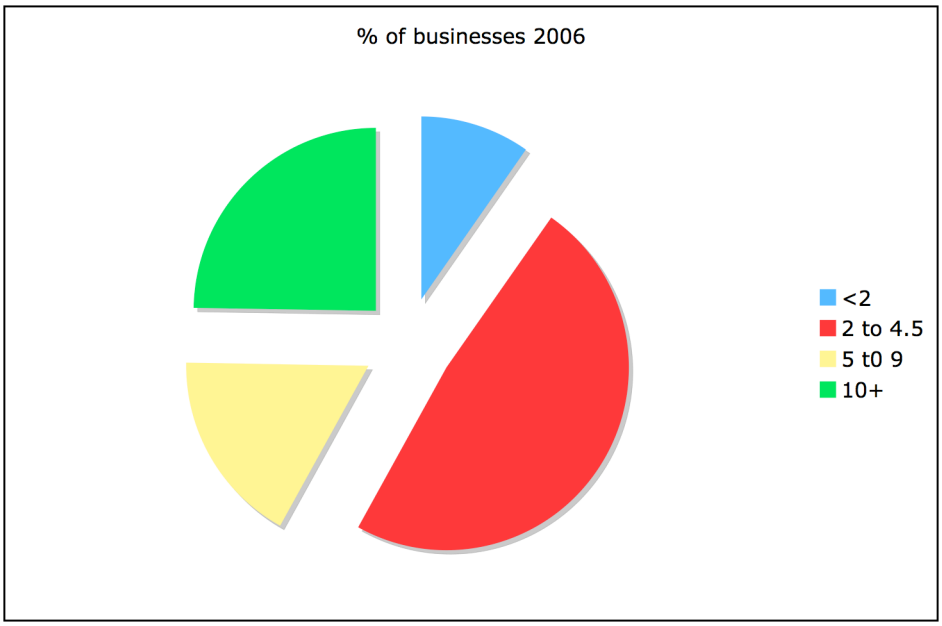
EMPLOYMENT FIGURES

Brunswick was, for many years characterised by a large number of small businesses that employed less than two people. In 2003 this category represented 15% of those surveyed. The 2006 survey reveals a shift down to only 9%. A large number 45% have between two and 4.5 people on the payroll which is very similar to the 2003 figure of 44%. The number of businesses which employ 5-9 people has dropped from 30% down to 24%. This has been made up for by a significant increase in the number of



"larger" businesses which employ 10 or more staff, almost doubling from 12% to 23%. The largest business in town, the Hotel Brunswick, has 35 employees, swelling to 60 in the Christmas period.

Average number of employees per business



Total number of jobs in Brunswick Heads in 2006

The 66 businesses that were surveyed employ a total of 409 people, which is a 19.8% increase from the figures that the businesses indicated for 2 years ago (2004). The actual increase is more than double the conservative increase of 9% that was projected back in 2003 for 2005.

About half of the jobs (49.8%) are full time.

NB. If we assume that these 66 businesses represent 55% of the total workforce (ie we extrapolate the number of employees to the total number of businesses in Brunswick Heads and allow for the fact that the larger businesses have already been tallied), we could estimate the number of jobs (full time and part time) to be around 738, as compared with 556 noted in the 2003 business survey.

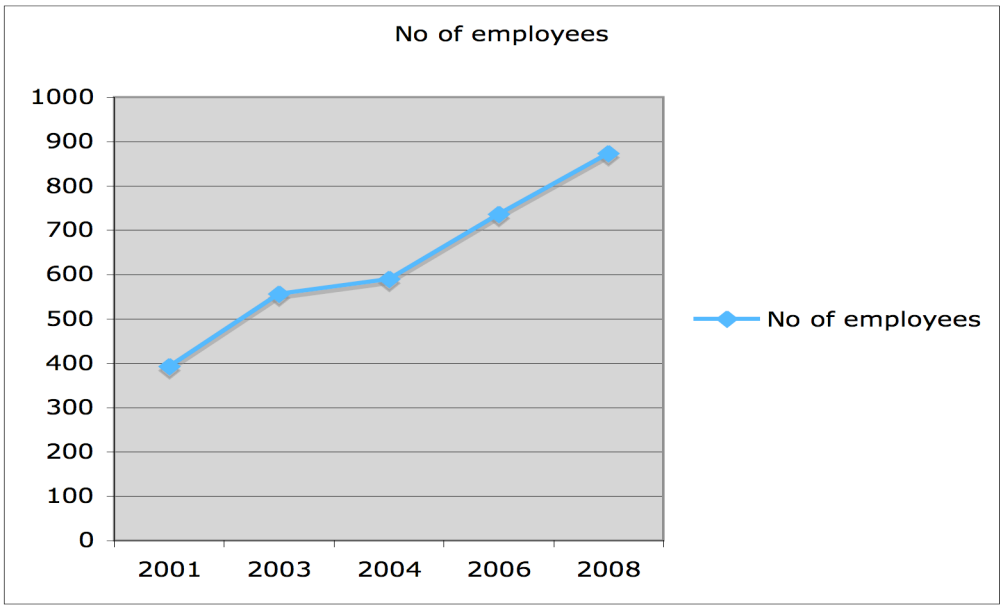
The projected number of people employed in these 66 businesses in 2 years time (2008) is 485 (extrapolated to 873). An increase of 18.6% by 2008 is expected, revealing significant optimism amongst the business owners themselves for business growth and sustainability. Of these 49% are expected to be full-time, and 51% in the part-time or casual workforce.

Reasons for expected increases in employment in the next two years are said to be related to natural business growth, increased trade, increased production, higher demand for services or patronage, or the need for consultancy assistance. Some will require more full time staff, others will adjust to meet specific needs regarding shift times. Some businesses will need to expand adding more rooms or relocating to larger premises, to meet the projected increase in demand, clients or participation and staff levels will need to be increased accordingly.

One business notes that the staffing levels will only rise during peak holiday periods.

A few businesses are not expecting to see any change in employment levels as their business growth stabilises or they becomes more efficient.

Employment increases 2001-2005



Actual and expected employment figures of Brunswick businesses from 2001 to 2008

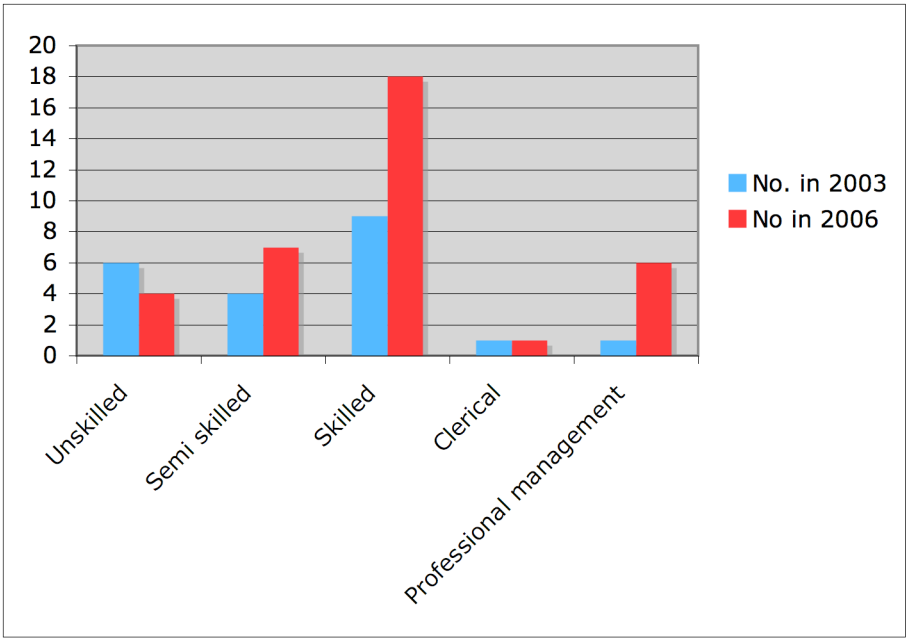
Further analysis of the data showing the full time and part-time components would be useful as the anecdotal evidence suggests that a large percentage of the jobs are part-time.

RECRUITMENT

Only 56% percent of businesses even have recruitment problems recruitment problems, a similar result of the 2003 survey. This figure also includes those who are not seeking to recruit workers. Those with recruitment problems report them to be in the following categories:

	2003	2006
Skilled	20%	29%
Unskilled	14%	7%
Semi-skilled	9%	11%
Clerical	3%	2%
Professional management	3%	10%

The results indicate a shift in the last 3 years away from problems with recruitment of unskilled workers to problems recruiting skills and professional management workers. It also appears those that have problems have difficulty recruiting in several areas.



RECRUITMENT PROBLEMS

The top four recruiting problems cited are:	2003
1. Poor work attitude	31%
2. Low skill levels	20%
3. High costs of training employees	14%
4. High wage rates for skilled employees	14%

In 2006 the top four recruiting problems are in the same order with the exception of the problem of skilled employees reluctance to move to the area, now moving into the list and ranking the third biggest problem. Poor work attitude is much less of a problem than 3 years ago and all other problems identified in 2003 are slightly less of a problem now.

	2006	2003
1. Poor work attitude	26	31%
2. Low skill levels	18%	20%
3. Skilled employees reluctant to move to the area	14%	
2. High costs of training employees	12%	14%
3. High wage rates for skilled employees	12%	14%

On the whole Brunswick business managers have very high regard for their employees. Unlike three years ago, very few businesses appear to have problems with work attitude and productivity. The 2003 comparisons follow in parentheses.

Employees report cards

With respect to skill level, work attitude and productivity, employees are more highly regarded by their bosses than in 2003.

*1. Employers are significantly happier with the **skill level** of their employees this year than in 2003.*
67% (55%) of employers found their employees' skill level to be excellent, 27% (30%) good and 8% (15%) fair. No-one rated them as poor or very poor.

*2. Employees **attitude to work** has also improved since 2003.*
63% (60%) found their employees' attitude towards work to be excellent, 34% (39%) good, 4% (5%) fair. No-one found their attitude to be poor or very poor, a significant change from 2003 (8%)

*4. **Productivity** has also improved slightly from 2003.*

59% (58%) found their employees' productivity to be excellent, 35% (33%) good, and 8% to be fair (5%). No-one rate their employees' productivity to be poor or very poor, an improvement on the 2003 results (5%)

Qualifications required by Brunswick Heads employers

Technical or professional qualifications required include;

- Relevant plant operator, work cover "green card"
- Motor vehicle repairer level 6
- Shipwright, boat building
- Degree in osteopathy
- DA certificate
- Dip Financial Services, Certificate 3 or 4
- TAFE Certificate in Horticulture
- Bachelor Degree in Health Sciences, current First aid certificate
- Real Estate Certificate & licence
- Butcher
- OH & S Certificate
- Drivers Licence
- RSA
- Diploma of Health Science
- Fitness certificate, first aid, Boot camp certificate
- Teaching qualifications

One of the largest business in town has on going problems recruiting ticketed plant operators, and another has difficulty finding car spray painters.

Hospitality
Barista x 4
Kitchen & food handling x 3
Chef/cook & short order cook x 2
Cleaning x2
Waitstaff
Bar skills
Management
Point of sales systems

Retail
Customer service x 10
Product knowledge x2
General retail skills x2
Sales skills x2
Eftpos knowledge

Communication skills
Communication skills x 5
People skills x 5
Literacy & numeracy x 3

Computer literacy x 10

Trades
Machinery operation
Spray painting

Health
Naturopathy
Hygiene knowledge
Massage & bodywork

Other
Interpretation & implementation of Gov policy
Specific knowledge of Aboriginal art
Signwriting & installation
Bookkeeping

Qualities

- Speed, efficiency, quick thinking, intelligent, fast learners, entrepreneurship
- Positive personality, enthusiasm, motivation, confidence with people, empathetic, commitment to ongoing education
- Cleanliness, politeness, good presentation, punctuality, trustworthy, honesty, reliability,
- Maturity, youth, common sense

While the basics of good work ethic, customer service, basic communication, social skills and money handling skills were all important, the bar seems to have been raised higher as far as expectations regarding other personal qualities. Enthusiasm and a positive personality feature strongly as desirable qualities, and with rents having increased so much, efficiency and productivity have become highly sought after qualities by restaurant and café employers.

MENTORING OF YOUTH

There was more interest expressed in mentoring programs this survey, with 14 businesses as compared with only 9 in 2003. A large number of businesses did not respond to this question.

C. EXTERNAL FACTORS

Businesses predict that profits over the next two years will be impacted upon by several factors, some positively but most negatively. Additional Brunswick Heads specific factors of "Rent increases" and "council policies" were once added again to the list of standard factors in the survey and it is interesting to note the changes regarding these between 2003 and 2006. (NB there were 6 more respondents in 2006 than in 2003 so the ranking gives a more accurate picture than the raw data)
Factors are listed from highest impact down to the lowest.

2003 SURVEY

Rank	Factor	No. of businesses
1.	Economic climate	24
2.	Population changes	23
3.	Council policies	18
4.	Local/domestic competition	16
5.	Wage rates	14
7.	Rent increases	11
8.	Taxes	10
9.	Government policies	10
10.	Changing consumer tastes	9
11.	Raw material costs	9
12.	Energy costs	7
13.	Financing availability	7
14.	Interest rates	6
15.	New technology	6
16.	Transportation costs	3
17.	Raw material shortages	2

2006 SURVEY

1.	Economic climate	22
2.	Population changes	21
3.	Rent increases*	19
4.	Local/domestic competition	17
5.	Transportation costs*	16
6.	New products	14
7.	Wage rates	12
8.	Raw material costs	12
9.	Interest rates*	12
10.	Government policies	11
11.	New technology	10
12.	Changing consumer tastes	9
13.	Energy costs	9
14.	Taxes	8
15.	Council policies*	7
16.	Foreign competition*	6
17.	Financing availability*	3
18.	Raw material shortages	2

Other factors listed were the adverse impact of skateboarders on footpath outside shop and rising sea level.

Several factors listed as impacting on businesses over the next 2 years have remained constant since 2003. However, the stand out changes since 2003 (*) are worthy of note for strategic planning:

- Increasing impacts of interest rates
- Increasing impacts of new technology
- Increasing impact of rent rises
- Increasing impact of transportation costs
- Increasing impact of foreign competition
- Decreasing impacts of Council policies
- Decreasing impact of financing availability

IMPACT OF CHANGES AND INNOVATIONS

The survey shows that 38% of Brunswick businesses will not be affected by innovations or changes to their industry and 27% are unsure. The 27% who indicate that they will be affected have a range of concerns which appear to be specific to their industry, and many are related to government legislation and regulations. The numbers are similar to 2003 but the changes that will affect businesses are different.

Changes & innovations include:

- The influx of overseas products
- Changes in product presentation
- Introduction on HICAP facilities
- Deregulation of NSW lotteries
- Massive surf retail stores in key shopping precincts, factory outlet stores & brand flagship stores
- Better transport & access to airport facilities
- Technological & equipment changes eg move away from offset printing to digital
- Smoking laws
- Price rises due to the drought
- Shortage of tradespeople & hourly rates determined by insurnce companies

D. INTERNATIONAL TRADE

Only nine (13.6%) of the businesses surveyed are involved in international trade. (one more than in 2003). This involvement includes online bookings and sales, overseas clientele or importing.
An additional 7 businesses have expressed interest in international trade in the future, so we might see a shift in the trend in the netx survey.

E. LOCAL ENVIRONMENT

BRUNSWICK AS A PLACE TO DO BUSINESS

59% believe being located in Brunswick Heads is a help (up from 52% in 2003). There was considerable ambivalence 50-50 with a 35% response rate, but not one business in Brunswick believes that being located in the town is a hindrance to their business. Only 6% did not answer this question.

This positive attitude is further supported in the next section, where businesses are asked to rate Brunswick Heads as a place to live and work.

BRUNSWICK HEADS AS A PLACE TO LIVE AND WORK

The Big Winners

1. **Climate** was the outstanding winner in the ratings with 60% of respondents rating it as excellent and 31% as good (totalling 91%). This is even higher than 2003 at 84%.
2. **Schools** was second with 12% scoring as excellent and 59% scoring as good (total 81%). While the excellent rating this time was much lower than 2003 at 25%, the good rating was very much higher. As there is only one primary school and one large pre-school, this is a great vote of confidence in the quality of the local schools.

The Big Losers

1. **Land costs** was the biggest loser with 25% rating it very poor and 26% poor (total 61%, higher than 52% in 2003), bumping cultural facilities form its top spot in 2003.
2. **Cultural facilities** was the next big loser, with a very poor rating from 19% of respondents and a poor rating from 30% (totalling 49% which was well down from 2003 at 76%)
3. **Building costs** were much further behind with 23% rating it very poor and 21% poor (total 44%).

Comment

Land and building costs are reflecting the changing increased popularity of the Brunswick Heads lifestyle. With the Cultural Planning process in full swing, there is certainly room here for some Council, business and community partnership planning and action in the development of cultural facilities.

Fair Ratings

In the predominantly fair category fell the following services and facilities:

Energy costs (63%), local rates (59%), labour costs (58%) & transportation costs (56%),

Mixed Reactions

Five services received fairly mixed reactions from good to poor this time compared with three services in 2003.

Housing varied from good (27%) to fair (43%) to poor (24%), most likely depending on whether you are already an owner or a prospective buyer.

Sporting and recreation facilities remain unchanged from 2003 varying from good (27%) to fair (37%) to poor (25%).

Other education & training providers ranged from good (25%), fair (41%) to poor (18%)

Health services recommendations varied much more this survey from good (38%0 to fair(41%) to poor (16%)

Freedom from social problems ranged from good (35%) to fair (45%) to poor (14%) with significantly fewer poor ratings than in 2003 (29%).

EXTRACT FROM THE DRAFT BRUNSWICK HEADS BUSINESS RETENTION & EXPANSION SURVEY 2006

RATING OF TOWN SERVICES AND FACILITIES

When asked which local services are considered to be inadequate for running their businesses, some distinct patterns emerge.

Services and facilities of greatest concern in 2003 in rank order were:

1. Public parking	37%
=2. Development Approval (DA) process	29%
=2. Public transport	29%
4. Street repair	24%
5. Street cleaning	19%
6. Street lighting	16%
7. Disposal of processed waste material	14%
8. Recycling	12%
9. Street signage	< 12%

Services and facilities of greatest concern in 2006 are:

1. Public transport	33%*	29%
2. Public parking	26%	37%
3. Street repair	23%	24%
4. Street lighting	20%	16%
=5. Street signage	18%*	<12%
=5. Development Approval (DA) process	18%*	29%
5. Street cleaning	17%	19%
6. Recycling	15%	12%
7. Disposal of processed waste material	11%	14%

The stand out changes in the priorities from 2003 to 2006 are:

- The inadequacy of public transport connecting Brunswick Heads with other towns, which affects visitation and staffing, and needs urgent attention.
- The DA process is not considered to be as inadequate as in 2003.
- Street signage has now appeared on the list of top 9 inadequacies and needs to be addressed by Council.

PROBLEMS WITH SERVICES AND FACILITIES

Businesses took the opportunity to elaborate on their issues with services and facilities.

Inadequate public transport for customers and staff x 4
Inadequate street signage – many people miss the town centre x 2
Poor local road maintenance x 2
Road works affecting the choice to come to Brunswick x 2
Street repairs x 4
Lack of street lighting x 6

Customer parking
Non-customers parking out front all day
Need somewhere for business owners to park
Residents using cars instead of walking to work

Insufficient attention on town cleanliness x 3
Not enough Council pick ups of public bins x2
Not enough bins supplied by landlord
Additional bins too expensive
Difficult to get good industrial recycling service
Fortnightly recycling service inadequate
Lack of bins outside shop

Electricity black/brown outs x2
Broadband outages

Sewerage treatment works delayed
Coolangatta has only 2 Qantas flights
No airport facilities close by
No natural gas – cylinders are expensive
Development process too slow, too complex, lengthy delays affect investment

RECOMMENDED CHANGES TO THE TOWN

There were numerous suggestions for improvements to the town in the 2006 Business Survey and there are strong recurring themes. Those ideas with * were also listed in the 2003 survey.

Social amenity

Respect for the aged
Young & old have a right to be part of this township
Stop conflict between groups
More involvement in projects by more people *
Encourage diversity and creativity eg arts, cultural groups, art centre
More activities in the library for all ages
Recreational facilities for families eg kids biketracks, bike routes & skatepark x 3 *
Skatepark within the town area eg at Torakina *
More & improved sporting facilities *
Better youth facilities *
Free Tai Chi classes to public (paid for by Council as in Noosa)
Fix boat harbour foreshore & slipway
Cinema

Infrastructure & services

Better public transport x 3 *
More affordable transport for kids
More parking x 7 *
More visitor parking
Short term customer car parking
Open some of the parks for parking in holiday season
Abolish cars in the CBD, people only precinct
Reduce heavy traffic on Tweed St
Stop the highway degrade
Finish roadwork asap
Street repair *
More bins
Remove, move or fix the Housie Shed
Better public toilets x 4 *
Improved street lighting x 6 (including near shops) *
More lighting in parks at night
More seating outside shops in Mullumbimbi St *

Jazz/food or similar festival with road closures *
Extend Sat monthly markets along into Banner Park
Attract bigger stalls at Brunswick markets

Stop sewerage outfalls into the river
New sewerage plant *
Lift the sewerage moratorium
Expansion of population
Dredge the river *

Footbridge from Bayside for access to beach
More walkways and cycleways *
Bikeway through the park
Better public facilities - shelters, playgyms

Establish riverside boardwalks
Establish riverside tracks for bikes and pedestrians x 2
More picnic tables & BBQs in parks*
Riverbanks supported by rock walls
More seating in the parks

More police presence *
Contain crime & deal with social issues
Better health services
More affordable housing
Slow the growth in housing
Quality of rental accommodation improved, made better value
Increased ratio of permanent residences to holiday rentals

Environment & beautification

Maintain the town's identity and character *
Keep it simple (not another Byron Bay)
Make the town more inviting
Revamp and clean up of buildings & shopfronts *

Town beautification, sculptures etc
Upgrade Tweed St, streetscaping, beautification x 5 *
More trees *
Beautification of foreshore (beach & river) *
Preservation of natural assets

Cleaning & maintenance *
Clean up gardens & facilities
Clean the whole town x 2
Clean footpaths in front of shops
Cleaner parks & gardens

Economic

Encourage variety in retail outlets
Encourage right type of business for the town's needs
More advertising *
More outside dining areas
Commercial landlords should update their properties every 2 years
Lowering of Caravan Park prices
More retail space
More support from local residents & local businesses to shop locally
More professional businesses
Another bank/credit union
Brothel
Increase holiday accommodation x 2
Improve standard of holiday accommodation

Council

More support from Byron Council *
Future planning for the town
Better town planning and infrastructure
Beware of overdevelopment
So called "improvements" usually ruin paradise
No major changes by developers

Comment

Lack of public transport, lack of public parking and lack of Council maintenance services (street repair, cleaning, lighting & signage) are the major town service issues affecting businesses and there is an expectation that more funding should be allocated to bring these up to a satisfactory standard. Better street lighting has been requested for many years, but there has been little action. Street repair has been attended to in recent years, but the maintenance program for roads and footpaths and cleaning, especially of the public toilets, needs to be stepped up considerably.

Parking and public transport issues are interrelated. The topography of Brunswick Heads is ideally suited to bike riding and walking and there is an opportunity to capitalise on these modes of transport. However, Brunswick is being visited by a greater numbers of residents from other towns in the Shire, especially on the weekends, and the public transport system is considered to be extremely inadequate.

Brunswick has benefited from new cycle tracks into the township, courtesy of State Government and Council funding, and bike racks are now required. However, only limited public bus transport is available between Brunswick and Mullumbimby, and Brunswick and Byron Bay. Night time and weekend employees commuting from outside Brunswick Heads are not serviced well at all.

A Parking, Traffic and Pedestrian Safety Plan was developed in 2004, which outlined various strategies for improving the parking issues outlined in the 2003 survey. Timed parking, with 2 and 3 hour restrictions was introduced in 2004 in the commercial area. School staff now park away from Fingal St, and many shop staff now also park outside the CBD and walk, freeing up a significant amount of parking for customer. However this is not well policed.

Overflow parking is currently being considered by Council, with proposals for parking in some of the parks on certain festivals and busy days of the year. The Catholic Church or Public School could also make their grounds available on market and special event days for excess parking. There is also scope for Parking to be reorganised on Tweed St, and 5 minute drop off zones near Torakina Park to be installed for the less mobile who wish to picnic in the park.

Disposal of waste is expensive and the public bins are inadequate. Extra bins are required in Mullumbimbi St. The Council operated recycling facilities are totally inadequate and the costs involved in using private contractors for responsible recycling are prohibitive.

OVERALL OPINION OF BRUNSWICK AS A PLACE TO DO BUSINESS

Excellent	14%
Good	53%
Fair	24%
Poor	3%
Very poor	0%
Not answered	6%

Despite all the challenges and inadequacies to follow, 91% of businesses rating Brunswick as a fair to excellent place to do business. These scored are expected to rise again when these issues are addressed.

ECONOMIC AND EMPLOYMENT OPPORTUNITIES

Promote cultural activities

More cultural events
More festivals
More cultural events
Fewer cheap family events

Promote tourism
Tourism
Visitor information centre 7 days per week
Embrace the day trippers
Improved hospitality
Encourage eco-tourism activities
Increase amount of holiday accommodation
Clean it up. Go for the Tidy Towns prize
Semi covered area for outdoor dining during inclement weather
More restaurants
Major seafood restaurant like “Fins”
Encourage mobile vans to sell near the beach

Buy local program
Local residents shopping locally instead of Tweed or Byron
Strengthen the buy local campaign
Community support to shop locally
Encourage locals to do business in town

Expand, improve, attract new facilities or businesses
Another banking facility
Bigger library and museum
New hospital
Expand existing businesses
More job opportunities for youth
Increase the levels of quality of business management. “Lift the bar”
Being proactive

New industry/ educational facility
Improvement of the harbour
Low key development of the Fishing Co-op
Support a new marine College
Promote shop locally campaign
Support marina and marine cultural centre
Establish marine college
Create a maritime college
Marine College
Support for the marine college and boatbuilding training
Development of a marine college and associated businesses
Development of a marine college and associated businesses
Boat industry, sailing club

Development
More retail space
More development
More land available for subdivisions and buildings

Council relationship
New Council
A more business minded Council

F. BUSINESS PLANS AND DECISIONS

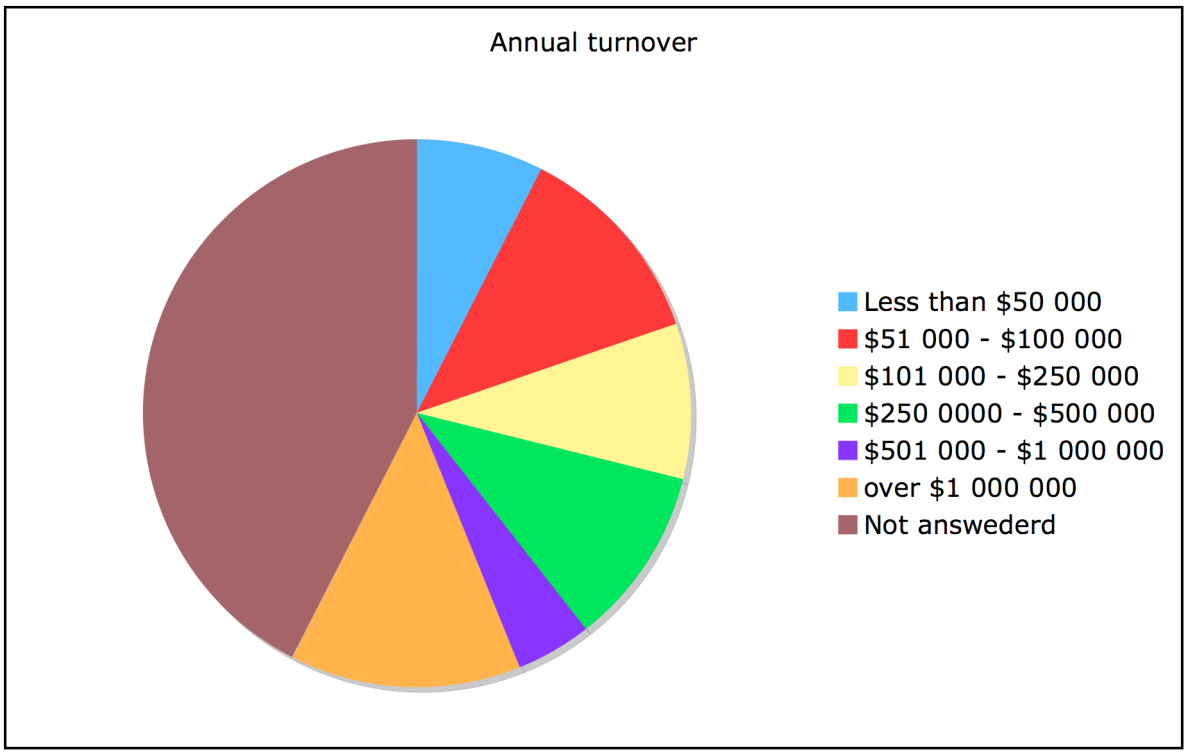
TURNOVER

The question on turnover was not well received again this survey with even more businesses (42%) declining to answer the question.

A much smaller sample of 38 businesses therefore provides only sketchy data, which should be considered with caution.

Although there is an indication of a slight shift towards higher turnover in the last 3 years, with a fairly even distribution, this data indicates that Brunswick Heads is not a wealthy town, particularly for a holiday town. Rising costs, particularly rents, in the last 3 years have forced prices up. The survey reveals that:

- 8% of businesses surveyed have a turnover less than $50K pa, compared with 14% in 2003
- 12% of businesses turnover $51K-$100K compared with 10% in 2003
- However there was a drop of 14% down to 9% in the number of businesses in the next bracket $100k-$250 turnover compared with 2003.



EXPANSION PLANS

The results show that 29% of respondents are considering expansion within the next two years and 29% are unsure. Most of these have sufficient property to allow some expansion and eight businesses have already had discussions with Council or business development organisations about the possibility. Only three businesses (5%) are planning relocation, and another 18% are unsure, because of various barriers. No-one is considering relocation out of town, unlike like the previous survey when 5 businesses were considering moving elsewhere.

BARRIERS TO EXPANSION:

- Lack of suitable premises X 10
- Market conditions - economic slow turn with rising interest rates
- Additional costs, petrol and rate rises, lack of funds, and difficulty getting finance
- Poor trading during winter
- Government changes
- Council restrictions
- Ill health

Comment

The commercial area is almost at full capacity, with very little commercial space currently available in town to which businesses could relocate. Several businesses are seeking larger premises for expansion, and by far the biggest barrier is the lack of suitable premises in town, which will affect their ability to employ more people. There are now only 2 empty shops, compared with four shops 3 years ago and 13 eight years ago.

INTEREST IN NETWORKING

33% of Brunswick Heads businesses have indicated considerable interest in networking. Many already do, mainly through referrals and cross-referring. Much interest is still expressed in co-operative marketing.

Comment
Over the last year, the Chamber has co-ordinated several co-operative marketing campaigns and clearly there is support for more of this. The Simple Pleasures branding campaign of the town has in itself been a huge co-operative effort.

It appears that there is now interest in more specialised networks such as a circle of professional business (accountant/finance/insurance/legal/financial planning) and accommodation provider cross referrals.

G. BUSINESS SUPPORT SERVICES

BUSINESS DEVELOPMENT

The top three requests for information, advice or training were identified as

	2006	**2003**
1. Marketing	36%	34%
2. Management training	15%	9%
3. Industry regulations	11%	14%
3. Consumer affairs	11%	

Marketing is still of most interest by far and there has been a marked increase in management training since 2003. There was less interest in the area or labour/management relations (9%) and very little in quality assurance/accreditation (6%), finance applications (5%) or export market (3%). In response to the interest in marketing education, the chamber has organised a series of marketing workshops ion February 19th and 20th 2007 with expert presenter Linda Hailey, with funding assistance form DSRD.

PERSONAL ATTITUDES TO BUSINESS

Innovation
Brunswick businesses are interested as a group in innovation and new opportunities with 61% of respondents scoring themselves between a 7 and 10 on the rating scale. 20% gave themselves the top score of 10. This is almost identical to the 2003 survey.

Risk taking
A similar pattern was seen for businesses willing to accept risk, with over half od businesses (55%) scoring themselves between 7 and 10, and 16% scoring themselves a 10, and this also similar to the 2003 results.

Professional advice
Businesses are willing to seek professional advice about their business with 55% scoring themselves between 7 and 10, but this is less than last survey's 63% level of interest.

Organising and planning
When it comes to businesses assessment of their ability to organise work and business systems, 60% scored between 7 and 10, but only 8% rated themselves a 10.

Between 13 %and 16% of businesses scored themselves in the middle on 5 or 6 for all of the above.

Comment
Brunswick businesses are highly motivated and keen to learn, prime qualities for a town to continue with its economic revitalisation. They are open to professional advice, are moderate to high risk takers and highly interested in innovation and new opportunities. Their ability to plan and organise has appeared to have increased since 2003 and is now on a par with their interest with innovation and new opportunities.

CHAMBER MEMBERSHIP AND SERVICES

The final question on the survey sought to evaluate the relevance and performance of Chamber of Commerce and the demand for the work currently conducted on behalf of its members.

The results show that 53% of those surveyed indicated they are currently members, 40% are not members and 7% did not answer the question. One third of the 24 businesses who are not currently members indicated that they will join up next year.

The feedback on the services that the Chamber currently provide indicate a high interest from the 42 businesses who responded to this question in continuing with the following services:

Monthly newsletters	39
Town improvements	38
Festival organisation	37
Town promotion	38
Business development	34
Visitor Information services	37
Community projects eg skatepark	35
Council lobbying	29
Extension of buy local campaign	29
Further development of the website	25
Email news and updates	26
Hard copy newsletters	24
Establishment of a home business network	16

It is clear that nearly all businesses would like to see most of the current Chamber activities continue. but the establishment of a home based business is gauged to be a less important task.

CONCLUSION

The 2006 BREP Study was well received overall by the business community and a great deal of useful information was gained. The sixty businesses who took the time to complete the surveys are to be congratulated and thanked for their invaluable contribution.

- Comparison of data with the 2000 survey confirmed that the range of economic renewal strategies which have been implemented since 1999 have had a positive overall effect.

- Because of the large survey sample, an excellent snapshot of the state of business in Brunswick Heads was made.

- Recommendations from the survey will be provided as input into the Brunswick Heads 2003 Community and Economic Development Review on November 12th and 26th. A Community and Economic Development Plan will subsequently be developed for 2004-2009.

RECOMMENDATIONS

1. The development of a parking and traffic plan for the town
2. Work with Council on policy issues which impact on business
3. Improvements of amenities by Council – streets, footpaths, lights & cultural facilities
4. Completion of CBD Streetscaping and Trees on Tweed Project asap
5. Establishment of Tourism Information service/office
6. Development of targeted co-operative marketing strategies
7. Step up the “buy local” campaign
8. Enhance partnerships with Council and community groups
9. Encourage the active involvement of more business people in the Chamber and its activities