



BRUNSWICK HEADS BRE SURVEY SUMMARY 2012

Brunswick Heads Chamber of Commerce.



ABOUT THE SURVEY

The fourth Brunswick Heads Business Expansion and Retention Survey (BRE) was undertaken by the Brunswick Heads Chamber of Commerce (Chamber). This survey is one of the many economic development initiatives undertaken by the 88 strong member based Chamber every 3 years.

The survey was conducted in house from September to November by Michelle Kelly, Candice Klau, Mary Hodgson and Kim Rosen.

The 37% response rate was much lower than the exceptional 2009 72% rate but only a bit lower than the state average. A few questions has too few responses to be meaningful, but overall the data & patterns are useful.

The BRE Survey Report provides the community with invaluable data for application in three main areas.

1. The survey is a useful and practical tool for tracking the economic health of Brunswick Heads over several years and for evaluating the success of the economic renewal strategies and projects that have been implemented by the Chamber, its subcommittees and task forces in the last 3 years.
2. The Survey presents a 2012 "snapshot" of the Brunswick business sector with very useful data and material for prospective new businesses, the Chamber and the local Council, and for use in funding applications and submissions.
3. The survey provides an opportunity for the business community to provide quantitative and qualitative feedback on all aspects of doing business in the town. The aggregated ratings, identified issues and suggestions for improvement to the business and town environment can be used to effect change and will provide the Chamber with direction and input for strategic planning for the future.

With no funding assistance this time from Industry & Investment NSW, the project work was only possible to implement with cash and in-kind sponsorship from the following businesses and voluntary consulting work for the report and presentation.

The Chamber's mission is "to foster a dynamic local business sector, encouraging sustainable and innovative business development in line with the community's vision for Brunswick Heads."

2012 SURVEY SPONSORS



OVERVIEW

Since the 2009 Business Survey the Chamber has been busy implementing many of the items on the 2009 Survey wish list:

- Improving the Visitor Information services, producing maps and guides and running community events
- Undertaking business development, IT education, town promotion & marketing campaigns & website optimisation
- Progressing the Tweed St Masterplan, the construction of the skatepark and town safety issues
- Writing submissions, grants & building new partnerships
- Organising networking, fundraising & launch events
- Development in 2011 of the 2011-2016 "Taking Care of Brunswick" Community & Economic Transition Plan
- Looking after tourism in Brunswick - playing a key role on the Council's Tourism Advisory Committee & in the set up of a Byron Shire local tourism organisation, VIA Byron.

A small but steady stream of new businesses has brought fresh energy and ideas into town to complement the existing range of professional, retail and tourism enterprises operating in the town. The cluster of interesting and diverse secondhand stores has strengthened, complementing a very strong dining and alfresco cafe sector. Some upgrading of tourist accommodation to meet market expectations and considerable product diversification in many businesses has been undertaken in the last few years.

The many small businesses have had the most challenging 3 years since the late 1990's. The Queensland floods and our own severe weather events, the global financial crisis and the ever increasing fees and charges tested their financial sustainability to the max. Businesses kept tightening their belts to survive. Growth mostly ceased, and there were some job losses. The Chamber's town branding and promotional campaigns carried the business sector through the worst, and Brunswick Heads was perfectly positioned with its 'Simple Pleasures' brand to welcome all those visitors who had downscaled their holiday aspirations to something simpler. Visitors still came and spent in the eateries but scaled down their spending in the retail outlets. Tourism still remains the town's main economic driver.

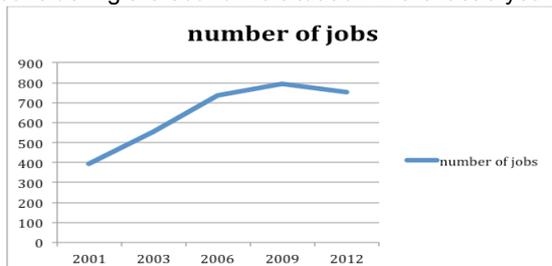
Brunswick Heads fared much better than other towns in the shire and along the coast. It seems the variety of strategies that were implemented in the last 3 years, including continual town promotion even when we were at our peak, has helped.

The outlook is somewhat promising, with most businesses expecting to remain stable or expand slightly in some way over the next two years, provided they can overcome some finance and skill shortage barriers. There are still issues with lack of public transport, parking and local government, but the business people are realistic, accustomed to using their own initiative and want to work co-operatively to achieve results.

Brunswick business people highly value the beautiful natural assets, the climate and their convenient location. They love the village lifestyle, the friendliness and the community spirit and want to protect it, while at the same time want more town promotion for increased revenue from tourism.

BRUNSWICK BUSINESS PROFILE

- About a third of the businesses were established in Brunswick in the last 5 years, with 15.2% starting up the last 2 years. One business is 71 years old.
- 57.1% of businesses were established in Brunswick.
- For the last 5-6 years the commercial property vacancy rate has been at a constant low of about 2%
- Brunswick has almost no industry or manufacturing.
- Brunswick has a significant number of professional & other services for its small size (1636 people).
- Retail is the most common type of business, followed by hospitality, health & wellbeing & accommodation. Hospitality & accommodation together tops retail. However, adding the extra 50 holiday properties puts accommodation way up the top with \$1.2m injection pa.
- The retail sector is made up of many interesting and eclectic little shops, adding greatly to Brunswick's village charm. A strong cluster of 11 secondhand business complements the 24 eateries.
- We finally have an eco-tourism business on the river!
- January & December are the best trading months by far. June, July are still the worst trading months, but August & May joined them this survey. For some businesses trading is often dependent on the weather.
- 68.9% of business their products/services locally, with a 16% increase in businesses Only 7.7% are interested in exporting their products/services.
- Brunswick Heads is a tourism dependent town. 92.6% of businesses surveyed rely on tourists to some extent. For 23% of businesses, tourism provides 80% more of their income. For 55.6% of businesses tourism makes up at least half of their trade. These figures exclude the extra 50 holiday lets not surveyed.
- Brunswick has many "small" businesses – 17.6% are one person businesses, 38.25% employ 2-4 staff (up from 2009), 38.25% employ 5-9 staff (up from 2009) & only 5.9% employ 10 or more staff (down from 2009).
- Data from 34 businesses reveal that they employ 183 staff between them. The estimated 140 businesses would therefore provide an estimated 753 jobs. This is a 6% decrease since 2009, but not too drastic considering the economic situation in the last 3 years.



- 35% jobs are full time, a drop since 2009 (38.3%), 16.75% jobs are part time and 49.15% jobs are casual. In the last 2 years many businesses replaced their full and part-time staff with casual staff to survive.
- Clerical, hospitality, motor & other skilled trades people are difficult to find. Only 3.8% have retention issues.
- Businesses are mildly optimistic about the future. 61.8% expect to increase their turnover, profits or staff levels. Only 12.9% expect a reduction in turnover while 11.8% expect a drop in profit & product demand.
- 62.5% of businesses are not considering expanding in the next 2 years, 18.75% are unsure. The main barrier to expansion by far is finance.
- Almost no-one is planning to relocate their business, although one is considering closing.
- Co-operative marketing & referral of work are still the preferred ways businesses like to work co operatively
- The major areas of weakness in the businesses skill set & where improvement is most desired are: developing & commercialising new products/service, marketing, succession planning and maintaining work/life balance.

LIVING & WORKING IN BRUNSWICK

- 55.6% of businesses in total rate Brunswick Heads as an 'excellent' (13.9%) or 'good' (41.7%) place to do businesses Only 2.8% rate it as 'very poor'. Not as positive as 2009.
- As a place to live & work, lifestyle, village life & community spirit are highly prized, the main assets being the beach and river, climate, proximity to SE Qld & airport, schools, friendly people, tourism, strong Chamber & VC and range of shops.

"Bruns still has a village feel and community"

CONCERNS

- Lack of public transport, parking pressures, leakage from markets, high costs of running a business (DA's rent, rates, storage & energy and the global economy are seen as the main barriers to further economic growth and job creation.
- The greatest levels of dissatisfaction with infrastructure & services are with lack of rail transport, the DA process, inspections & licensing, availability of appropriately zoned land, and recycling and waste disposal.
- Businesses rate the cost of labour and telecommunications as "fair". The dissatisfaction with the cost of leasing space, storage and energy increased the most since 2009.
- Most want the Council to show a more business-friendly approach, as fees and tougher regulatory requirements are impacting on viability. Many concerns were listed.

OPPORTUNITIES

- Maintain the village charm & promote "Simple Pleasures"
- More streetscaping, landscaping, trees & beautification.
- Implement the new draft Tweed St Masterplan in stages
- Improve visitor amenities & support the Visitor Centre.
- Improve the foreshore parks, picnic areas and toilets.
- Do something about the lack of public transport & implement simple strategies to provide more parking for customers.
- Better waste disposal & recycling systems for businesses.
- More recreational facilities & activities especially for youth.
- Work more closely with Council to resolve safety issues, ensure the protection of our holiday letting industry & keep fees & charges at a manageable level for small businesses.
- Run more community events and family activities.
- Increased focus on town promotion, co-operative marketing and other ways to attract more customers.
- Increase tourism yield
- Retain the interesting retail mix, keep the shop clusters in balance and actively attract the businesses that we need (eg butcher, cheaper lunch options for locals, more holiday accommodation and government services such as the Red Cross which bring people to town)
- Increase awareness of the use of technology, social media etc and continue to optimise our website.
- Develop more housing & retain the medium density housing that we have.
- Continue Chamber activity in the areas of marketing, town improvement/streetscaping, website optimisation, advocacy, business development, events, Visitor Centre, campaigns, community projects & partnering with other organisations.
- Manage and streamline our limited resources (\$ and people) to achieve as much as possible.
- Spread the workload more widely, encouraging members to contribute one hour pa to projects, events or fundraising.

