St Helena Government

2018 Business Survey

Report

Statistics Office

14 March 2019

How to contact us

This report, and the data used to prepare the tables and charts, are available from the St Helena Statistics Office website at http://www.sainthelena.gov.sh/statistics.

For any comments, questions, or requests for additional analyses, please contact the Statistics Office by email at statistics@sainthelena.gov.sh, by telephone at +290 22138, or in person or by mail at The Castle, Jamestown, St Helena, STHL 1ZZ.

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2018 St Helena Business Survey

About this report

1. This report documents the key results and methodology of the Business Survey. The Statistics Office of the St Helena Government conducted the survey, between October and November of 2018, and the target population was all private enterprises on St Helena with employees, including not-for-profit businesses.

2. There have been at least two similar surveys previously, the “Private Sector Enterprise Employment Surveys” of 2004 and 2010. Since the target population of those surveys was different (in particular, they included the self-employed), this report does not include comparisons with those surveys.

3. This report also does not include information about St Helena Government or related statutory bodies, since they were not part of the survey target population for the Business Survey – although an adjusted (shortened) questionnaire obtained similar information from Government Departments.

4. The survey included a specific section (G) designed to obtain information to help compute estimates of Gross Value Added (GVA) by industry, for the 26 businesses with 10 employees or more. The results from this section have not been included in this report; they will be included in separate publications relating to GVA.

Acknowledgments

5. The 159 businesses who participated in the survey and who took the time to complete the questionnaire deserve special thanks. Thanks are also due to the team at Enterprise St Helena (under the direction of Rob Midwinter) who provided valuable advice on the design of questions and helped with pilot testing, and to the team at the St Helena Statistics Office who implemented all aspects of the survey (led by Neil Fantom, Statistical Commissioner): Kelly Clingham, Justine Joshua, and Bertina Benjamin.

Survey objective

6. The primary objective of this survey was to provide a current picture of the labour market in relation to the private sector. A secondary objective was to obtain estimates of Gross Value Added for larger companies, for the purpose of developing a production-based national accounting framework (up to now, Gross Domestic Product and associated economic indicators have been estimated using either the expenditure of income methods).

Design

7. The 2018 Business Survey was conducted under the legal framework provided by the 2000 Statistics Ordinance. Participation in the survey was compulsory for all businesses with employees operating on St Helena, including not-for-profit enterprises.

8. The Business Survey was a census; all businesses with employees listed in the register of businesses maintained and updated by the Statistics Office were included (that is, all businesses except the self-employed, where the proprietor is the only employee). The target population was different to previous surveys, which had included the self-employed; the change simplified the fieldwork and focused survey resources on businesses that are the source of employment of others. Any new businesses identified during the survey period were added to the register.

9. Letters explaining the purpose of the survey and notifying all businesses that a response will be required were sent to all businesses with employees. To publicise the survey and encourage good response, radio interviews were held on Saint FM and South Atlantic Media Services (SAMS), and a press release was issued. Enumerators made further contact to businesses with a visit or telephone call.

10. Since the survey was compulsory, there were no cases of a contacted business declining to participate. The total number of responses was 159, which employed (at the end of March 2018) some 1,444 people, both full-time and part-time. The 2016 Population Census recorded 2,114 employees (either full-time, part-time or apprentices), some 660 more; the difference is, very roughly, similar to the size of the public sector on St Helena. This gives reasonable confidence that the coverage of the 2018 Business Survey is very good, compared to the target population.

Classification of businesses

11. Businesses are categorized by their primary industrial sector using the highest level of the International Standard Industrial Classification (ISIC Revision 4). This is a practical approach, but there are limitations. The first is that the small size of the St Helenian economy means that some industries have only one or two operational businesses and so there is the risk of disclosure of confidential information. The 2000 Statistics Ordinance does not permit this, so the industry groups are further summarized; there is no summarized industry group that has less than five respondents (see Table 1). The second is that all responses of a business are allocated to their main industrial classification, rather than to each individual activity unit. Most businesses on St Helena conduct a single activity, but there are one or two larger businesses which operate several activities. In these cases, the business has been classified by the industry that accounts for the largest proportion of turnover.

12. A second classification of businesses is by size: businesses with ten or more employees are classed as “Larger”, and those with less than ten as “Smaller”. Most businesses surveyed were Smaller (133), with only a few Larger businesses (26).

13. The occupations of employees are classified using the lowest level International Standard Classification of Occupations (ISCO 2008), which enables reporting at any of the three higher levels used in the classification.

Table 1. Survey coverage

	ISIC Rev 4 groups	Number of businesses responding (November 2018)	Number of employees (at end March 2018)
Agriculture, forestry, fishing	A	15	67
Quarrying, manufacturing, electricity, water and sanitation	B-E	10	126
Construction	F	34	221
Wholesale and retail trade, repair of motor vehicles, transportation	G-H	44	580
Accommodation and food service activities	I	29	174
Finance, insurance, information, communication, real estate	J-L	6	101
All other service activities	M-S	21	175
Total		159	1,444

Data quality

14. Overall data quality in this survey is reasonable. The survey team focused on ensuring the accuracy of data entered on the questionnaires, and they cross-checked responses for internal accuracy. Occupations were coded based on responses given in relevant sections; in most instances these were sufficiently accurate, but there were a few cases, when descriptions were not precise enough, where judgement was used. There were a few questions (such as the number of vacancies arising for each position in section B2 of the questionnaire) that seem poorly answered, and these have not been tabulated. Details of recommended adjustments to the questionnaire for future surveys are given in an appendix to this report.

Data processing

15. Statistics Office staff entered data from completed questionnaires into Excel files using a prepared standard data entry templates. These files were combined and checked for consistency, into two basic data files: one record per business, and one record per business and occupation. An occupation record has three different formats, for the three different sections of the questionnaire where these data are collected (B2: employee positions; C1: recruitment difficulties; C2: vacancies).

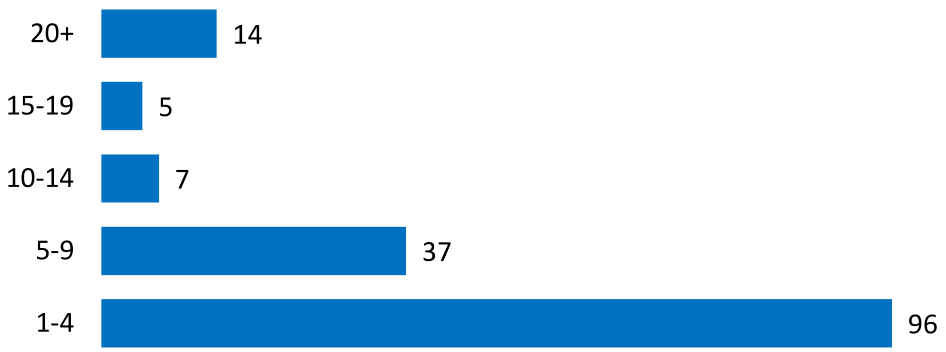
16. The completed dataset consists of 159 business records with 108 data items for each record, 556 records for section B2, with 11 data items for each record, 109 records for section C1, with 9 data items or each record, and 112 records for section C2, with 10 data items for each record (this gives a total of over 25,000 data items captured for this survey). The final, complete data files are maintained in Excel format; tabulations and analyses were also performed in Excel.

Results

A. St Helena's private sector businesses

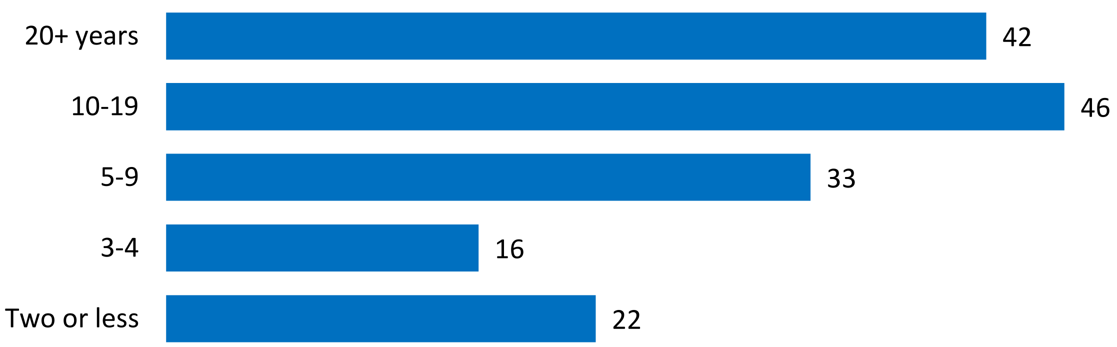
17. St Helena's private sector business environment has a large number of small businesses with less than ten employees; only 26 businesses of the 159 businesses surveyed employ ten or more. However some 959 people work in these larger businesses - two-thirds of the private sector workforce.

Chart 1. Distribution of businesses by number of employees at end March 2018



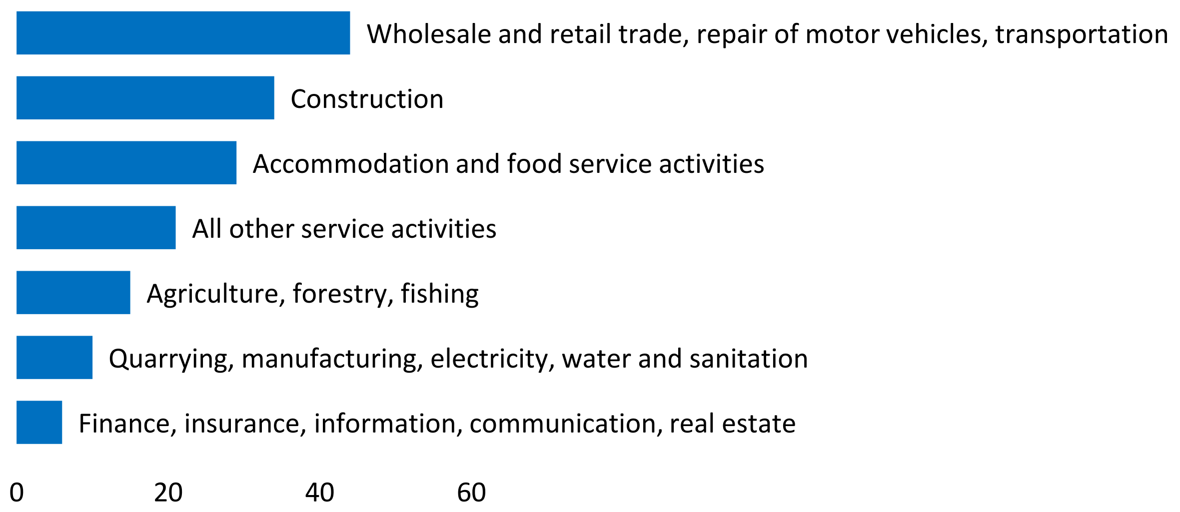
18. Just under half of all businesses surveyed have been operating for less than ten years, with 47 businesses (30%) operating for less than five years. Around a quarter of businesses are well-established, and have been operating for 20 years or more.

Chart 2. Number of businesses by length of operation (years)



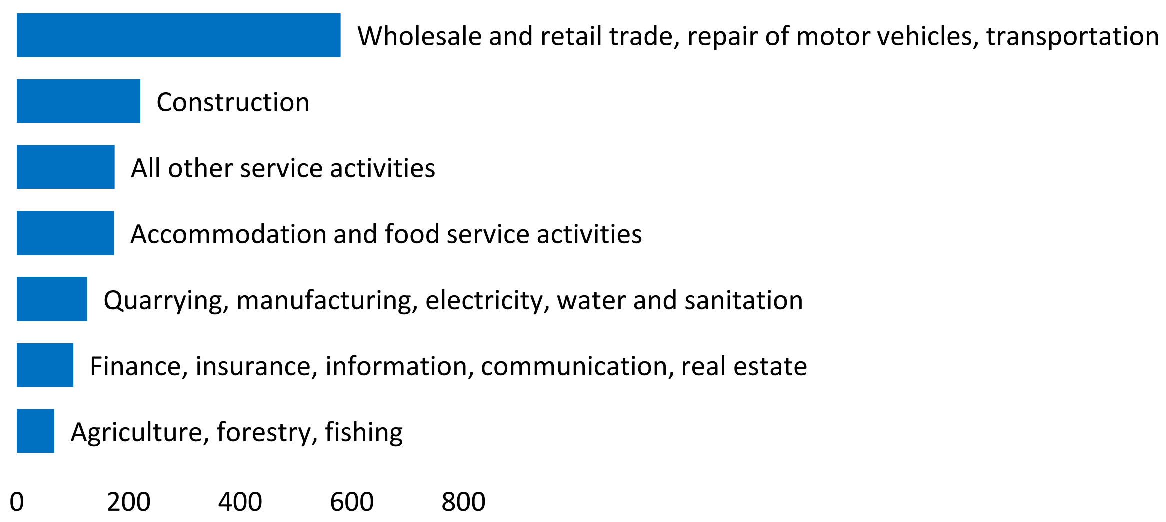
19. Chart 3 shows the number of businesses by major industrial activity. Most businesses operate in Wholesale and Retail trade, Transportation, and Accommodation and Food services. Sectors with smaller numbers of businesses include Production activities, and technical industries such as Finance, Insurance, and Communications.

Chart 3. Distribution of businesses by industry (number of businesses in November 2018)



20. Wholesale and Retail activities employ the most people in private sector businesses; Agriculture, Forestry and Fishing employ the least (Chart 4). Note, however, that the self-employed are excluded from this analysis; some of these do work in the agriculture and fishing industries.

Chart 4. Distribution of employees by industry (number of employees at end March 2018)



21. St Helena's younger businesses tend to be in Construction, Wholesale and Retail Trade and associated industries, and Accommodation and Food Services (Chart 5). The number of employees in younger businesses is highest in Construction, and Accommodation and Food Services, and lowest in technical service activities, and utilities and quarrying (Chart 6).

Chart 5. Number of businesses by activity and length of operation (years)

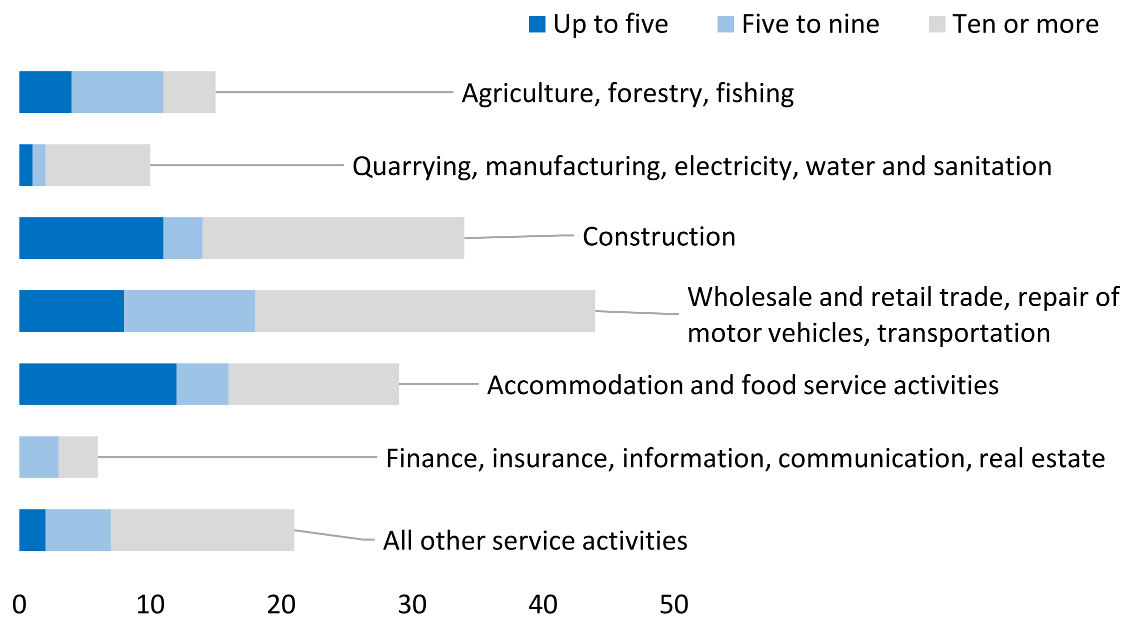
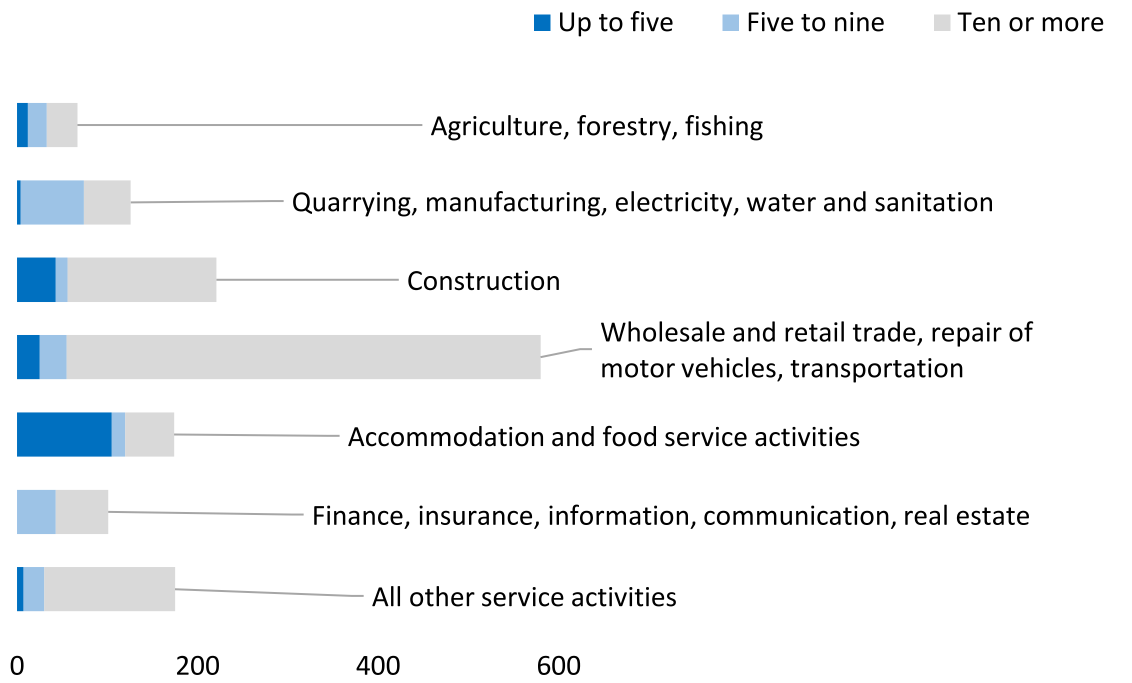


Chart 6. Number of employees by activity and length of operation of business (years)



B. The people who work in private sector businesses

22. The questionnaire asked businesses to report the number of people working in their business at the end of March 2018, by sex (male/female) and whether they are full-time or part-time.

23. Production industries (agriculture, forestry, fishing, quarrying, manufacturing, electricity, water, sanitation and construction) are dominated by male workers; some 88% of workers in those industries are male. For the remaining industry groups, women are in the majority, especially in service industries.

24. Part-time workers are more evenly spread between industry groups, although around half of all workers in businesses in agriculture, forestry and fishing are part-time, and there are slightly more part-time workers in accommodation and food service businesses, compared to other industry groups.

Chart 7. Number of employees by male/female and industry group, end March 2018

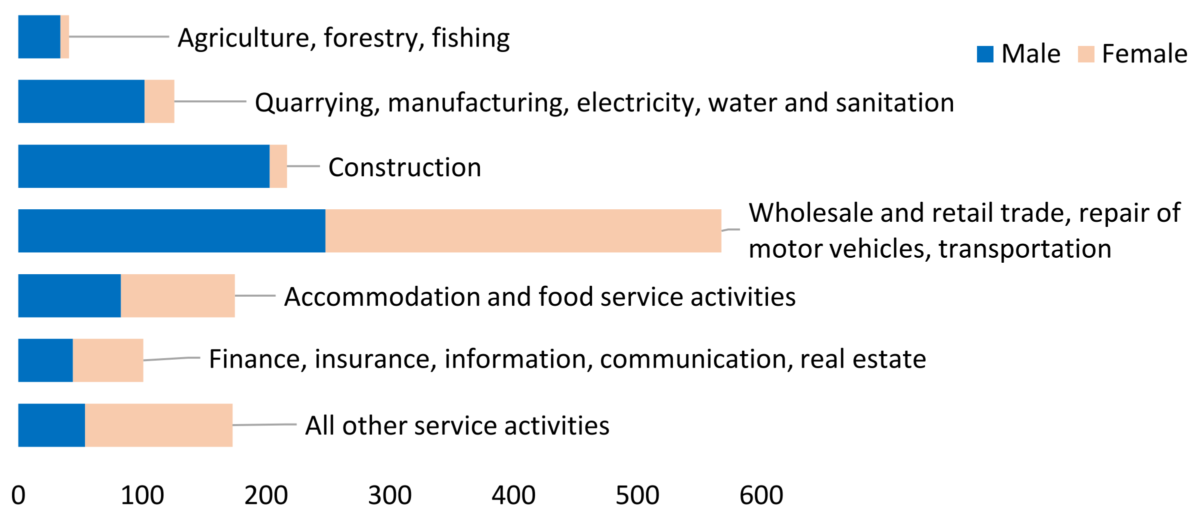
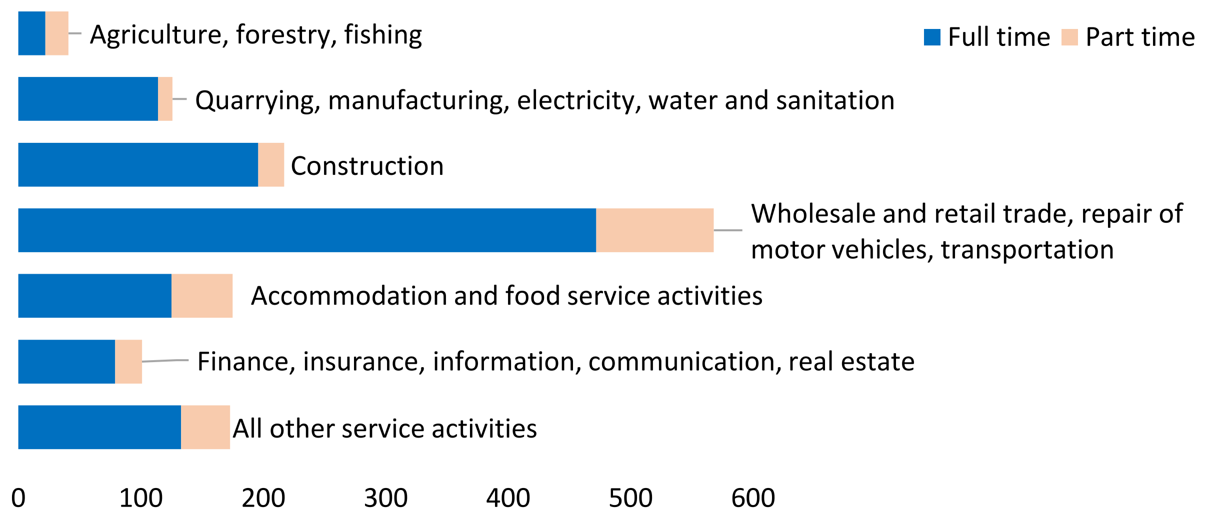
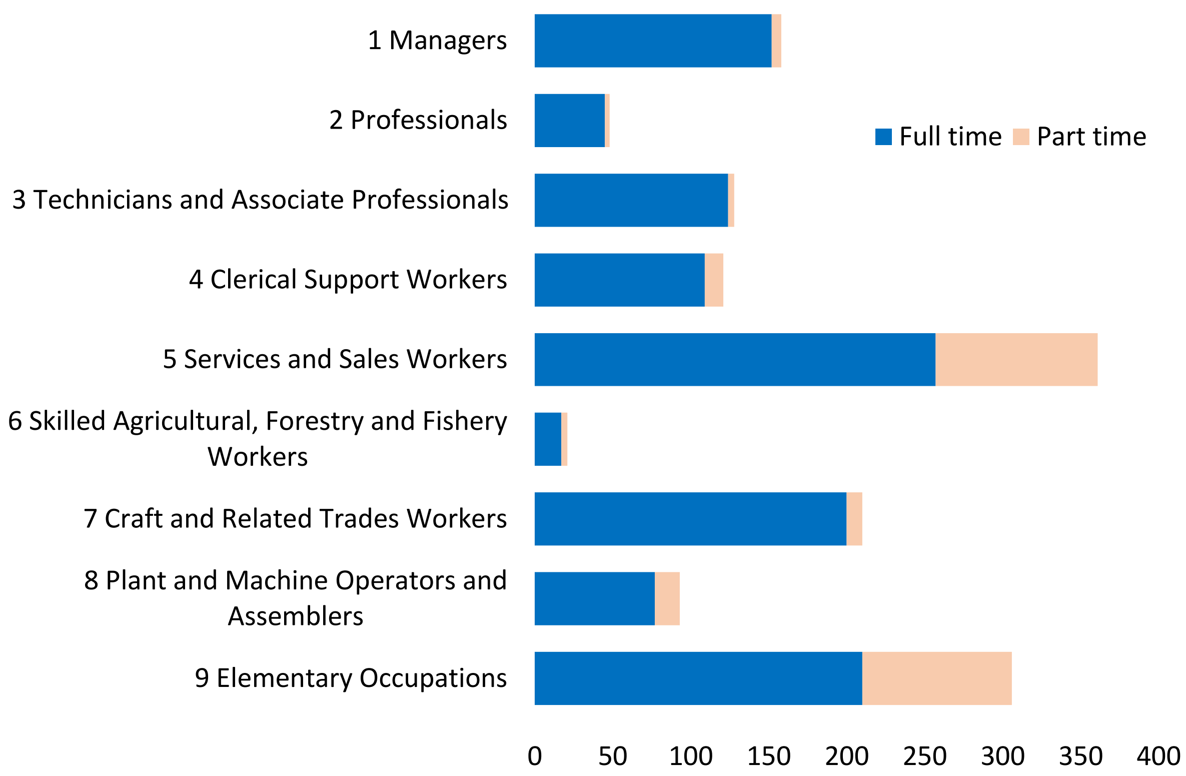


Chart 8. Number of employees by full-time/part-time and industry group, end March 2018



25. The distribution of the occupations of businesses reflects the patterns by industry. Chart 9 shows the number of occupations in each major occupation group; there over 350 services and sales workers, which is the largest group, and over 300 workers in elementary occupations (this includes unskilled agricultural and construction workers). These groups also have almost 80% of the part-time occupations, some 200 of the 255 positions reported by businesses.

Chart 9. Occupations of employees by broad group and full-time/part-time



26. This pattern is reflected in the detailed occupations of employees: the three most common occupations of employees in the private sector are shop salespersons and construction labourers and workers (Chart 10).

Chart 10. Top twenty occupations of employees of private-sector businesses

Note: "Building Frame" workers are those involved in construction of building structures, including foundations, walls, etc.

C. Staff recruitment

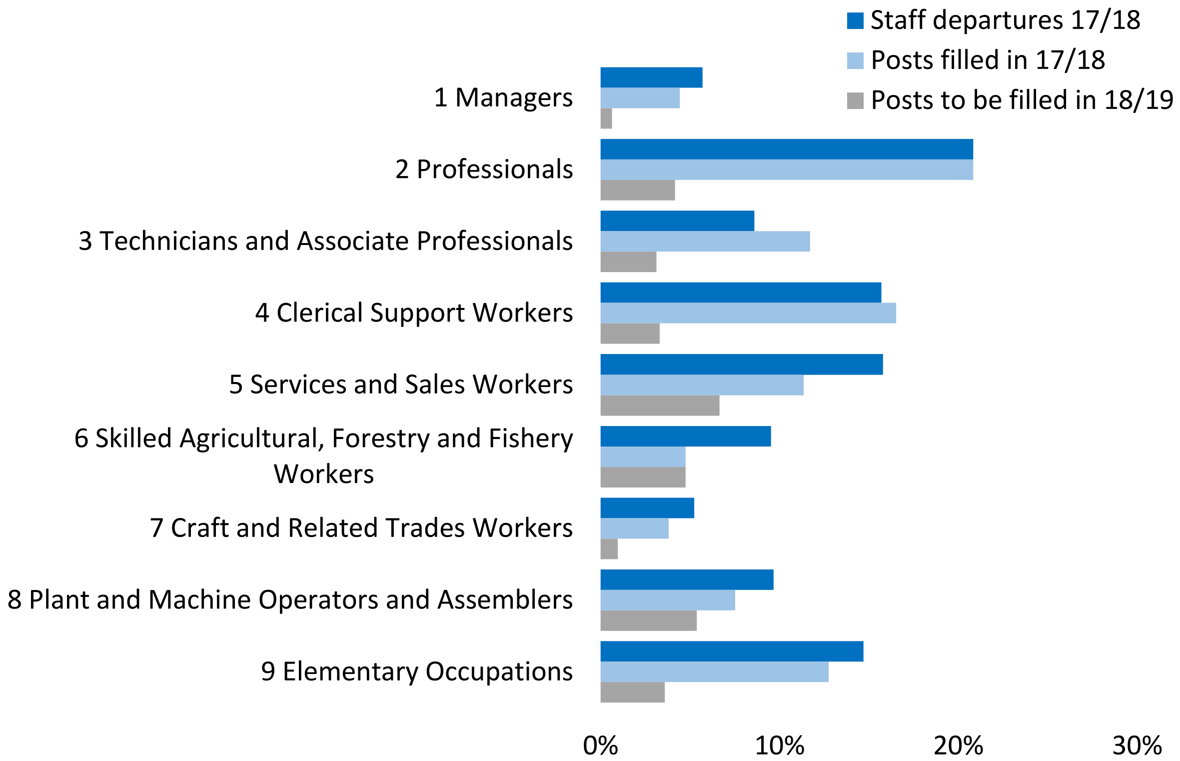
27. The questionnaire asked businesses to identify any occupations which are difficult to recruit locally, and to identify the impact these labour shortages have on their business (the scale was minor, moderate, or severe in both cases). Report table 2 identifies those occupations which at least two businesses reported at least a moderate difficulty in recruitment which resulted in at least a moderate impact.

Table 2. Occupations for which two or more businesses report both recruitment difficulty and impact (number of businesses)

Occupation		
1 Managers		**2**
Hotel Managers	*2*	
2 Professionals		**4**
Environmental Protection Professionals	*2*	
Accountants	*2*	
3 Technicians and Associate Professionals		**8**
Systems Administrators	*2*	
Chefs	*6*	
4 Clerical Support Workers		**2**
Accounting and Bookkeeping Clerks	*2*	
5 Services and Sales Workers		**22**
Travel Guides	*2*	
Cooks	*2*	
Waiters	*4*	
Bartenders	*4*	
Shop Sales Assistants	*5*	
Food Service Counter Attendants	*2*	
Child Care Workers	*3*	
6 Skilled Agricultural, Forestry and Fishery Workers		**0**
7 Craft and Related Trades Workers		**13**
House Builders	*3*	
Carpenters and Joiners	*4*	
Motor Vehicle Mechanics and Repairers	*2*	
Butchers, Fishmongers and Related Food Preparers	*2*	
Bakers, Pastry-cooks and Confectionery Makers	*2*	
8 Plant and Machine Operators and Assemblers		**0**
9 Elementary Occupations		**9**
Cleaners and Helpers in Offices, Hotels and Other Establishments	*5*	
Civil Engineering Labourers	*2*	
Kitchen Helpers	*2*	

28. Staff turnover occurs in all occupations, but in 17/18 it was highest in professional, clerical, sales and elementary occupations. Occupations with the lowest turnover rates were managers, skilled technicians, and trades workers.

Chart 11. Staff turnover: as percentage of total positions

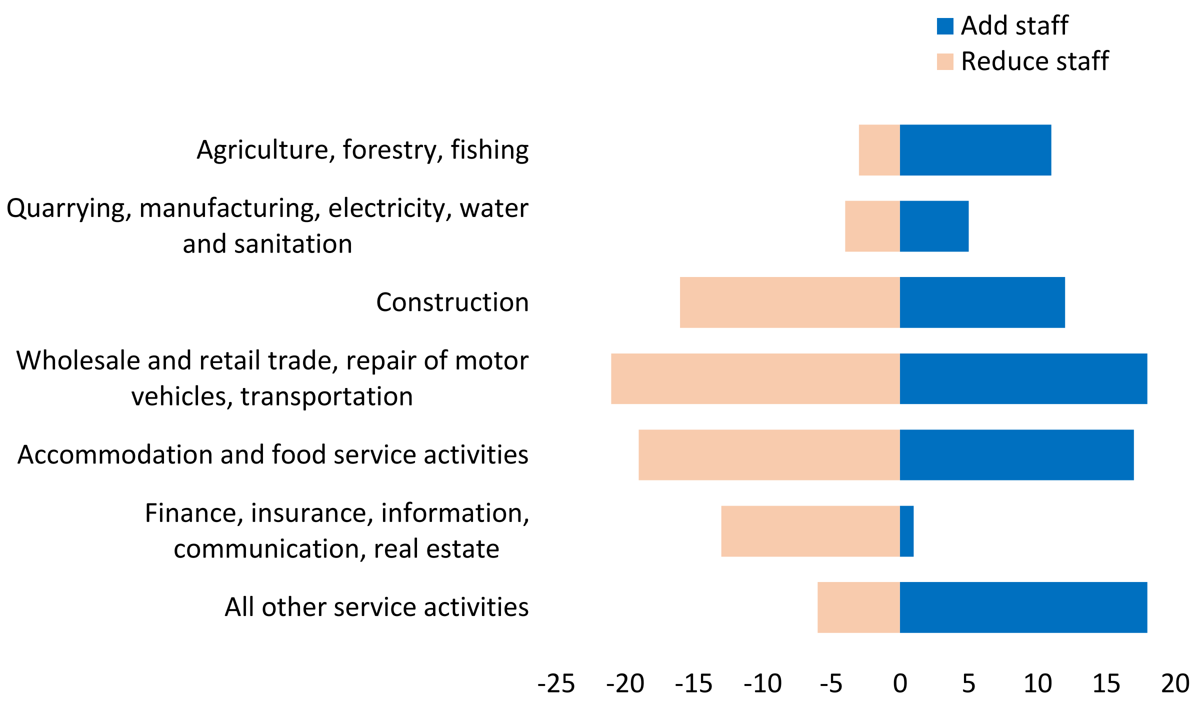


D. The business environment

29. Section D of the questionnaire asked various questions about the current business environment on St Helena.

30. Chart 12 illustrates private sector business responses to the question concerning their plans to add or reduce staff numbers in 2018/19. According to the responses received, the outlook appears more favourable to agricultural, forestry and fishing businesses, and those engaged in other service activities (this includes child care provision and other community services). The job outlook appears to be less favourable in construction, retail, transport, and the finance and communication industries. Care should be taken with interpreting these results, however, and they should be taken only as a very rough indication of the 18/19 labour market. In particular, since these questions ask about future plans, they are harder for businesses to complete accurately and there is likely to be significant non-response.

Chart 12. Number of staff reductions and additions expected in 2018/19, by industry group



31. Question D2 asked businesses to agree or disagree with eight statements about the current business environment on St Helena; the results are summarized in Table 3. Two-thirds of businesses agreed with the statement that “Running costs are increasing”; in every industry grouping, more than half of businesses agreed. Only one in seven businesses agreed that “Running costs are decreasing”, with just 3% of businesses in the Construction group and 7% of businesses in the Accommodation and Foods Services group agreeing. More than 40% of businesses agreed with the statement “Running costs are increasing dramatically”.

32. 50% of businesses agreed with the statement "There are new opportunities for growth", the second most popular statement. Some businesses see opportunities for growth, especially those in the finance, insurance, communication and real estate group (81% agreed with the statement) and in the quarrying, manufacturing, electricity and water, and agriculture, forestry and fishing sectors (70% and 67% agreed respectively). But businesses in the Construction sector in particular see fewer opportunities for growth (only 26% agreed with the statement).

33. While 30% of businesses overall agree that demand is decreasing, 34% agreed with the statement that demand is increasing. Within industries, demand appears to have fallen most in the Construction and Accommodation and Food Service groups (this may also reflect increased competition, which should be included as a category in the next survey). But in the Service industry groups, Retailing, and Agriculture, Forestry and Fishing grouping especially, more businesses report an increase in demand compared to a decrease.

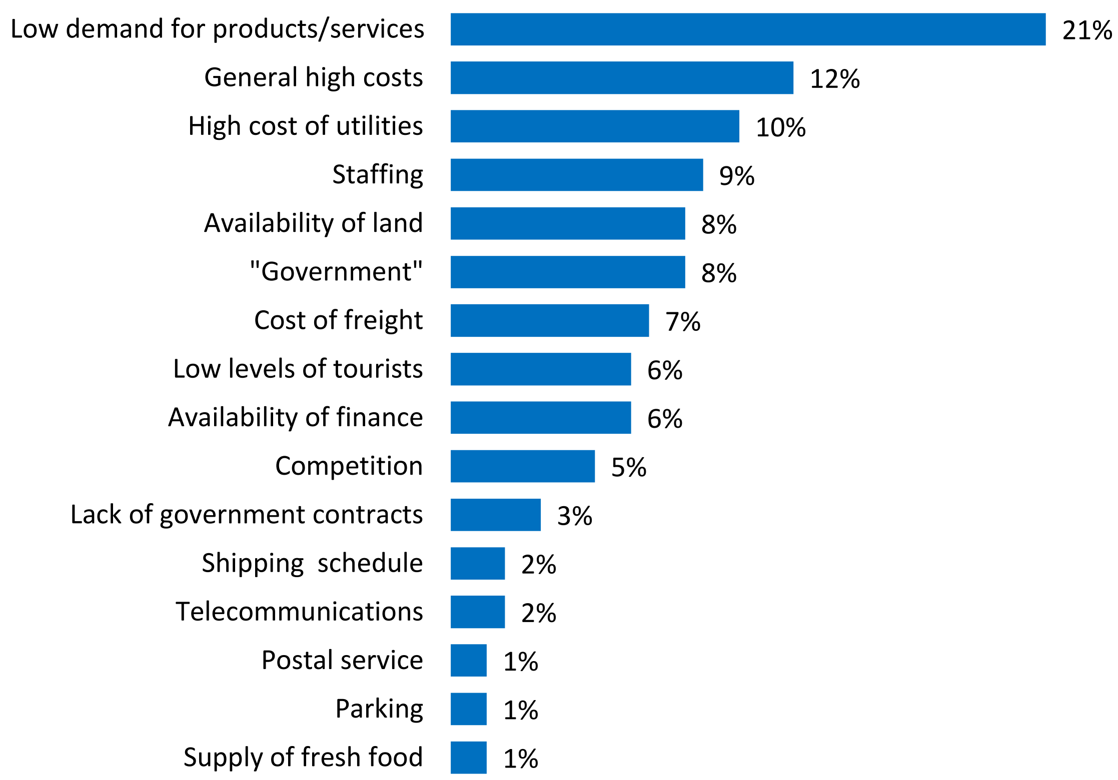
Table 3. Percent of businesses in each industry group agreeing with each statement about the business environment

	Demand increasing	Demand decreasing	Demand unchanged	Running costs are increasing	Running costs increasing dramatically	Running costs decreasing	New opportunities for growth	Expanding the business into new areas
Agriculture, forestry, fishing	47%	7%	33%	73%	33%	13%	67%	33%
Quarrying, manufacturing, electricity, water and sanitation	30%	20%	50%	60%	40%	20%	70%	30%
Construction	18%	44%	38%	53%	44%	3%	26%	32%
Wholesale and retail trade, repair of motor vehicles, transportation	39%	23%	36%	70%	30%	20%	57%	32%
Accommodation and food service activities	24%	48%	21%	66%	62%	7%	38%	17%
Finance, insurance, information, communication, real estate	33%	17%	50%	83%	33%	17%	83%	50%
All other service activities	57%	19%	19%	62%	43%	29%	62%	38%
Total	34%	30%	33%	65%	42%	14%	50%	31%

34. Question D4 asked respondents to list the main constraints or barriers to developing their business. Responses were open-ended, and have been grouped into sixteen categories – tabulated in Chart 13. Low demand is the main constraint, reported by over 30% of businesses. High costs, and the high cost of utilities, was

also reported by 12% and 10% of businesses respectively. Other constraints are reported to be staffing issues, availability of land, “Government” (this includes various criticisms of government policy or regulation), the cost of freight, low tourist numbers, and the availability of finance. Some constraints are specific to certain industries where there is key dependence (e.g. telecommunications, for companies for whom access to the internet is important, and lack of government contracts for the construction sector).

Chart 13. Main constraints or barriers to developing the business



E. Leave and benefits

35. Section E asked respondents to indicate their leave policy, and other benefits. For this section, and Section F, responses have been divided into smaller and larger businesses: larger businesses are defined as those with 10 or more employees - there were 26 of these in the survey.

36. Leave entitlements were recorded in days; this simplified responses, but it should be noted that some of the complexities of leave policies (for example, sick leave granted at half pay) were not captured.

37. For each leave benefit/entitlement in Section E, a chart provides an illustration of the percent of employees covered by each category of benefit, and a further chart illustrates the number of businesses (smaller or larger) that provide those benefits. For each pie chart, categories where businesses provide a certain number of days though a stated policy are shown in blue/darker shading.

38. Most employees (over 80%) of private sector businesses receive paid leave, although the length of leave entitlement varies (Chart 14). Similarly, over 80% of employees receive paid sick leave, although around 31% receive less than five days (Chart 15). Fewer employees – just over half - are entitled to either maternity or paternity leave (Charts 16 and 17). For over 30% of employees, the business they work for does not state a policy of either maternity or paternity leave. More than half of employees are entitled to paid compassionate leave; mostly this is a week or less (Chart 18). Many employees (around 17%) work for businesses that provide compassionate leave entitlements on a discretionary basis, and a further 20% work for businesses who have no stated policy.

Chart 14. Annual leave: percent of employees receiving entitlement

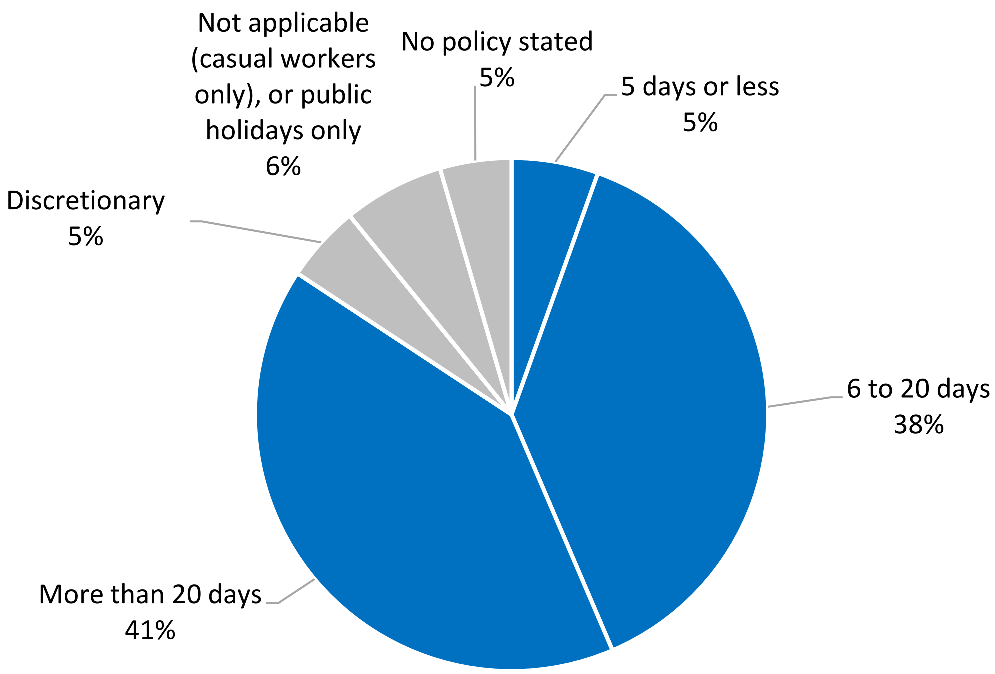


Chart 15. Sick leave: percent of employees receiving entitlement

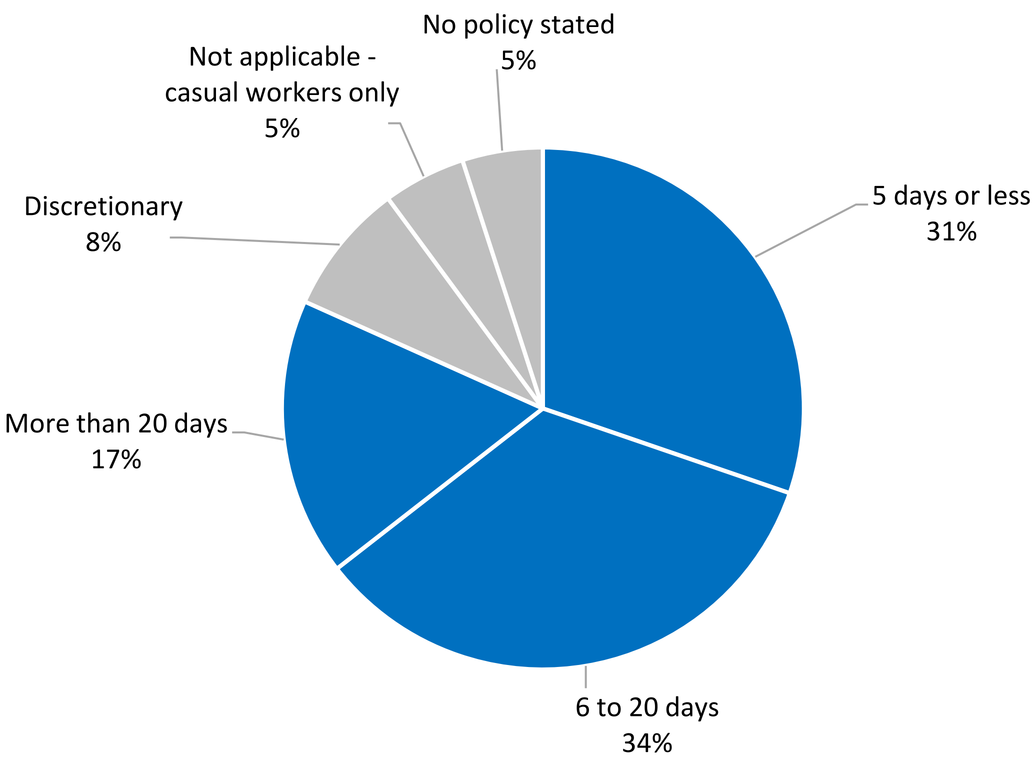


Chart 16. Maternity leave: percent of employees receiving entitlement

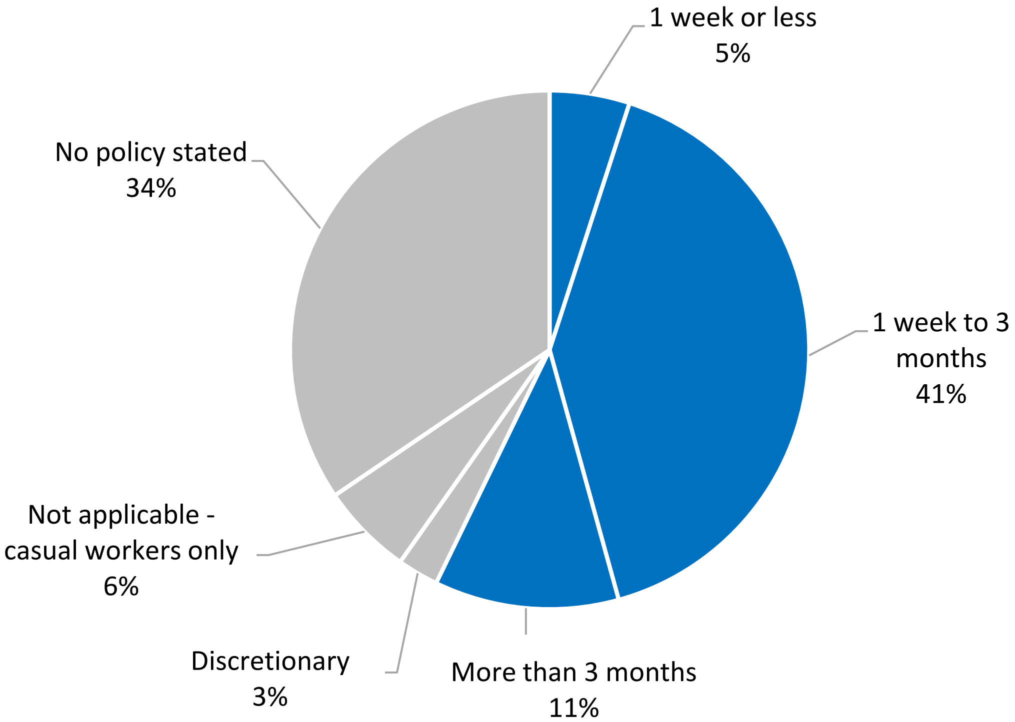


Chart 17. Paternity leave: percent of employees receiving entitlement

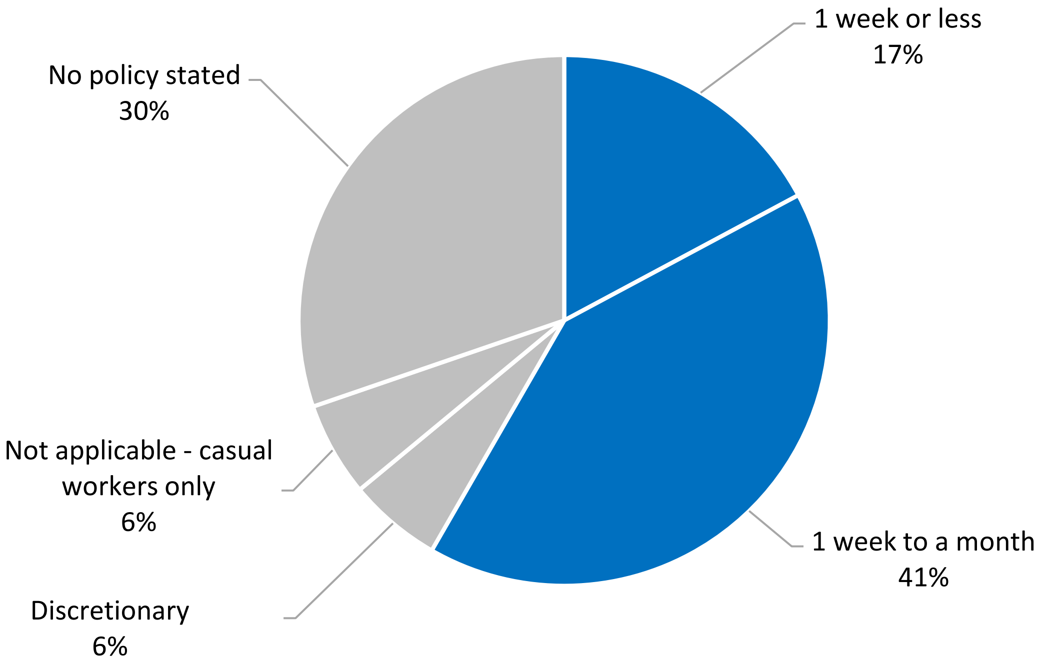
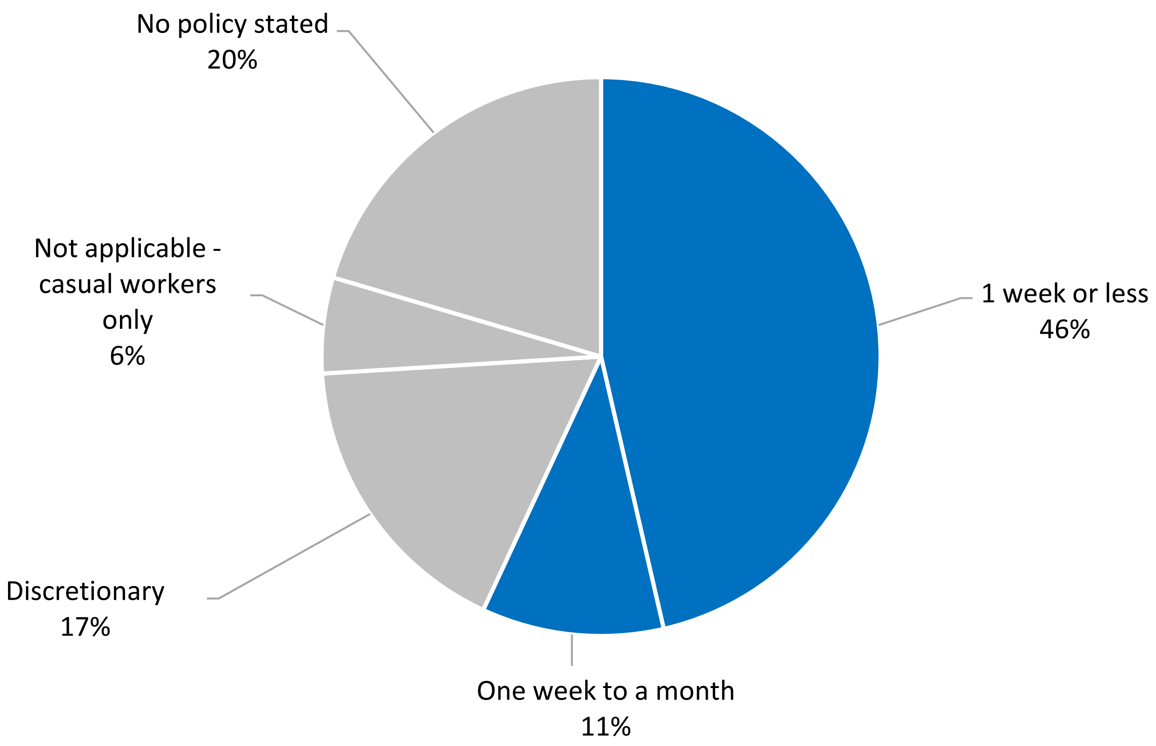


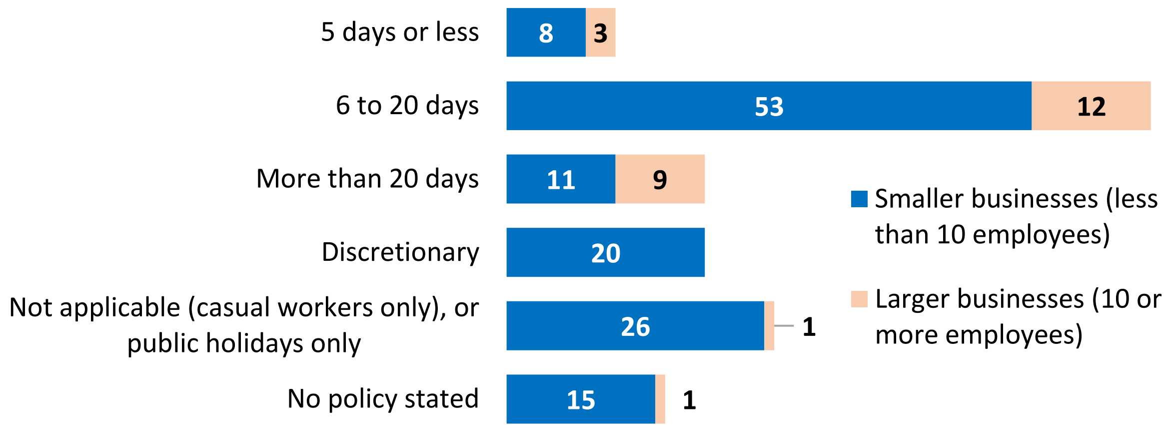
Chart 18. Compassionate leave: percent of employees receiving entitlement



39. Most larger companies provide annual leave entitlements in the range of two to four weeks. A small number provide less, although the question did not explicitly separate public holiday entitlement. Smaller companies are, overall, less generous with leave entitlements than larger ones; 20 smaller companies reported they provide leave on a discretionary basis, 26 reported that the question was not

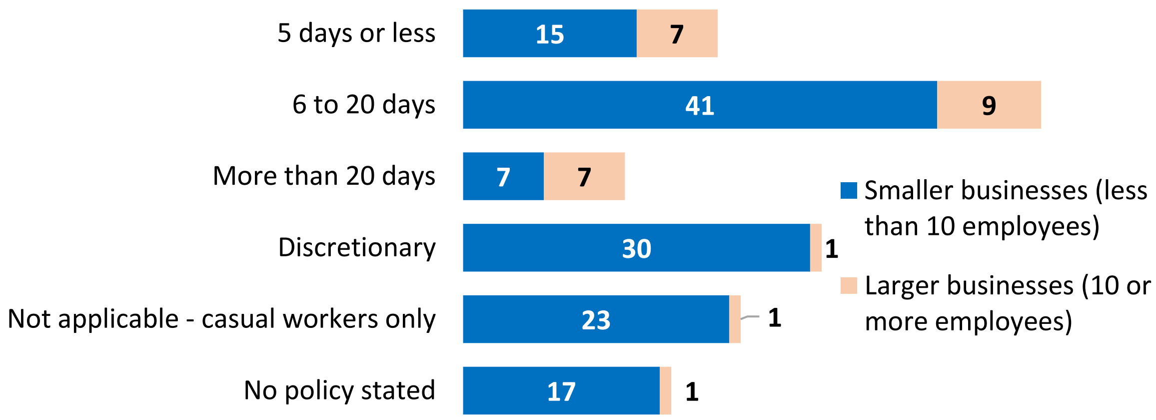
applicable since all employees are casual labour, and 15 did not state whether or not they had any policy.

Chart 19. Annual leave policies of smaller and larger businesses, number



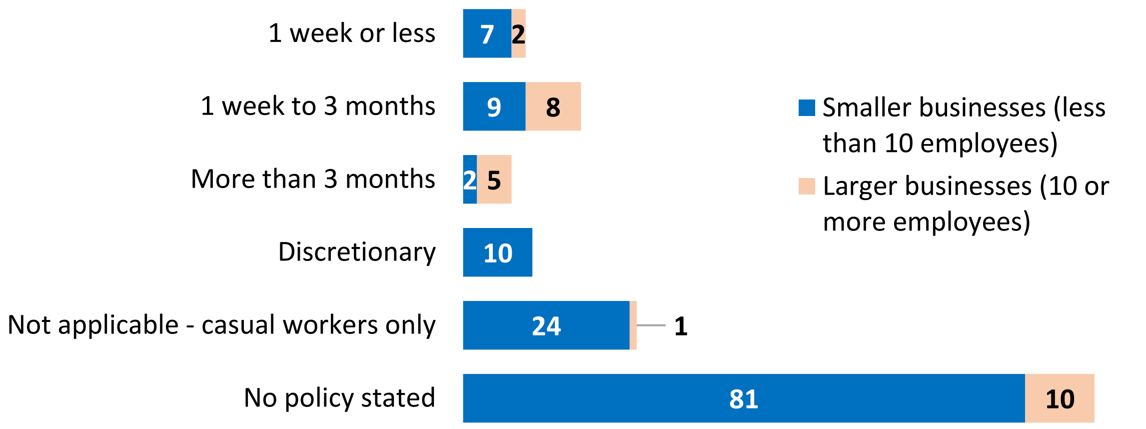
40. Patterns for sick leave policies are similar, though fewer businesses provide long sick leave entitlements, and sick leave of five days or less is more common. Many larger businesses indicated that longer periods of sick leave require medical certification, although this question was not asked specifically. Many smaller businesses (30) indicated that sick leave was discretionary – they do not have a fixed policy.

Chart 20. Sick leave policies of smaller and larger businesses, number



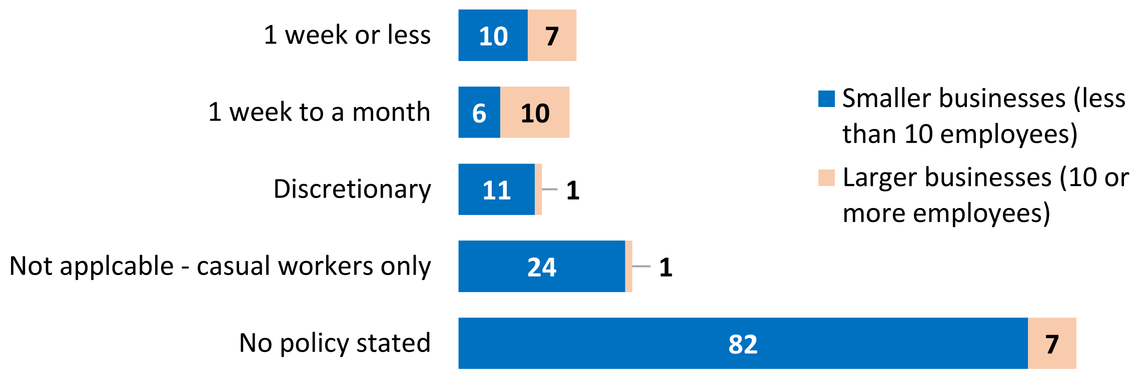
41. Most businesses – 126– do not have a maternity leave policy, or provide maternity leave on a discretionary basis; in some cases, this is likely because they do not have female employees. Most larger businesses do have maternity leave polices, although the length and nature of benefit varies.

Chart 21. Maternity leave policies of smaller and larger businesses, number



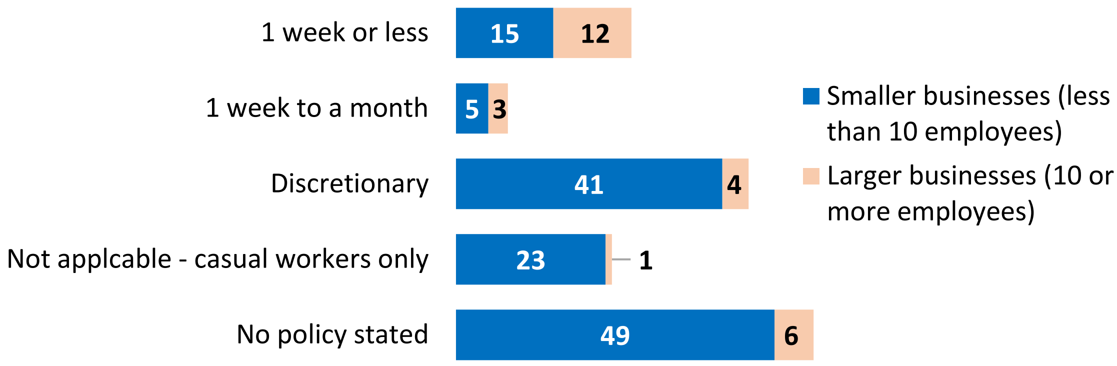
42. Patterns for paternity leave are similar: 126 businesses also report no policy, or discretionary allowances. Larger businesses are more likely to provide paternity leave than smaller ones, with no company providing paternity leave of more than a month (most companies providing benefits of around one or two weeks).

Chart 22. Paternity leave policies of smaller and larger businesses, number



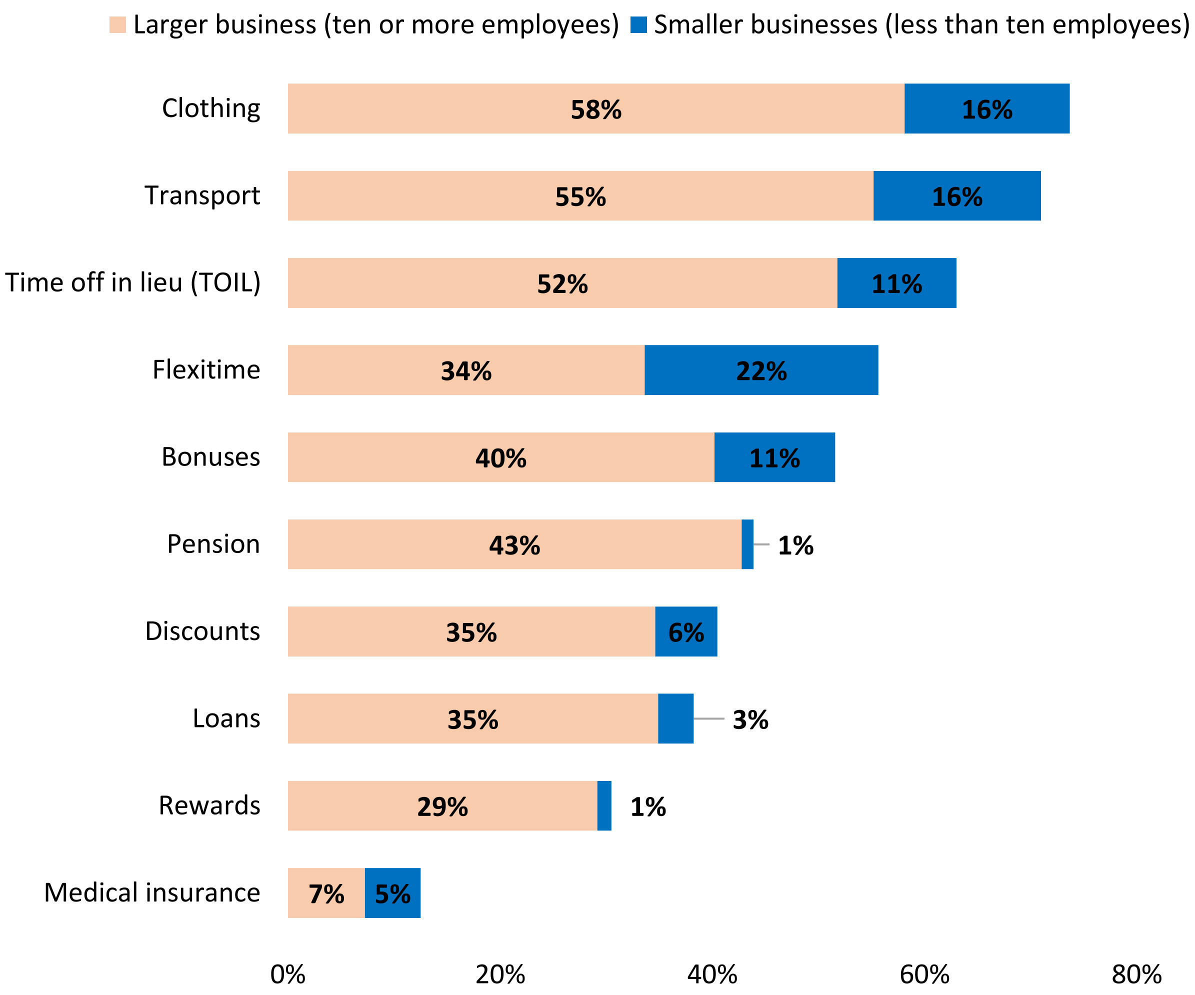
43. Relatively few businesses have policies for compassionate leave, instead providing this benefit on discretionary basis. For the majority of those businesses that reported a policy, the entitlement is a week or less (27 businesses).

Chart 23. Compassionate leave policies of smaller and larger businesses, number



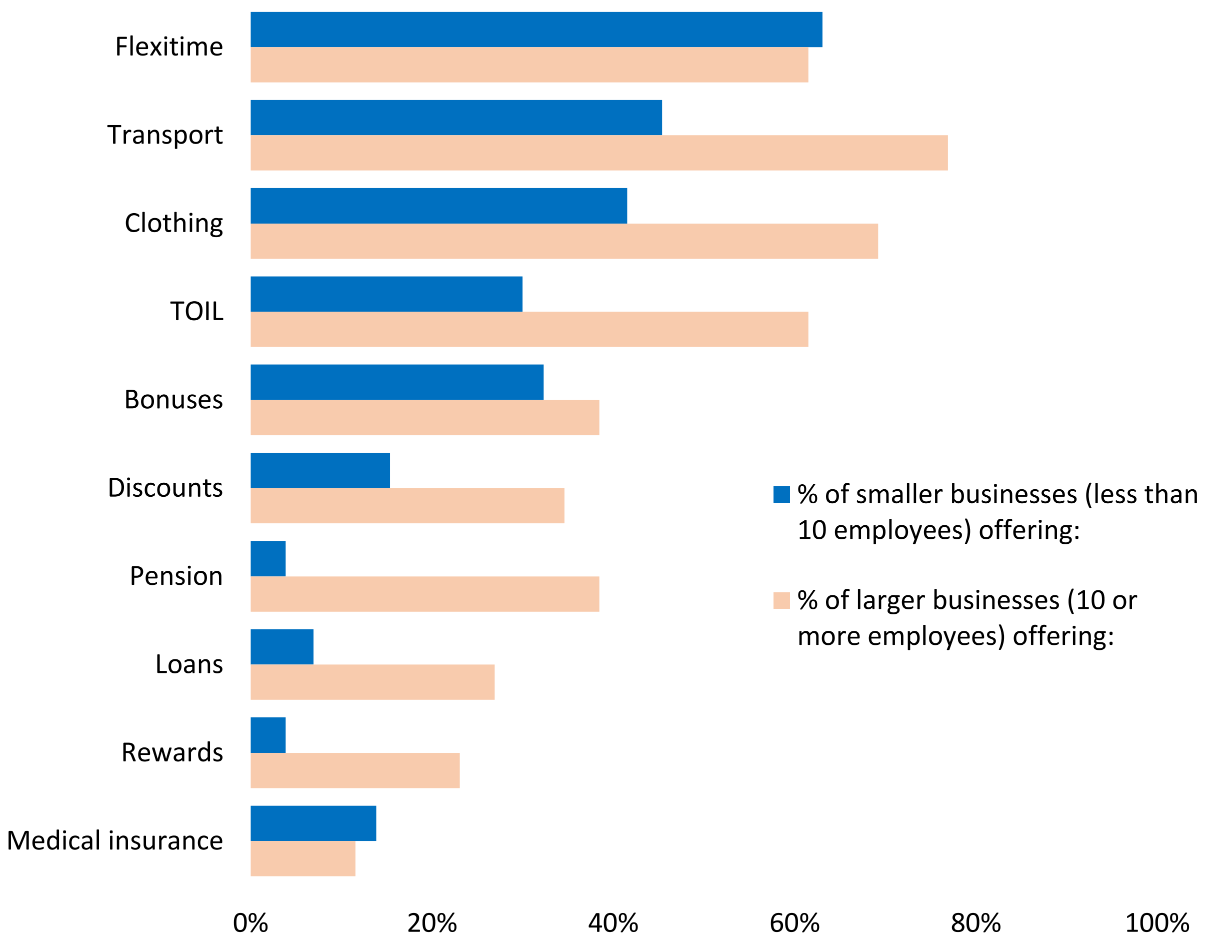
44. The questionnaire included a question about other benefits apart from leave (question E2). The most common benefits received by employees are clothing, transport, and time off in lieu of time worked or flexible working arrangements (Chart 24). Few employees receive medical insurance. Less than half of employees receive pension benefits, and very few employees of smaller businesses.

Chart 24. Benefits received by employees as a percentage of all employees, split by business size



45. Chart 25 shows the percentage of each group of businesses (smaller of larger) that provide each benefit. Flexible working arrangements are offered by around 60% of all companies, but larger companies tend to offer time off in lieu (TOIL) more than smaller businesses. Larger businesses also tend to offer more benefits that smaller ones throughout. Apart from flexible working arrangements, the most common other benefits are transport to and from work, clothing, and bonuses. Relatively few companies provide pension benefit (around 40% of larger companies, and around 5% or smaller ones) or personal loans (less than 30% of larger companies and less than 10% of smaller ones).

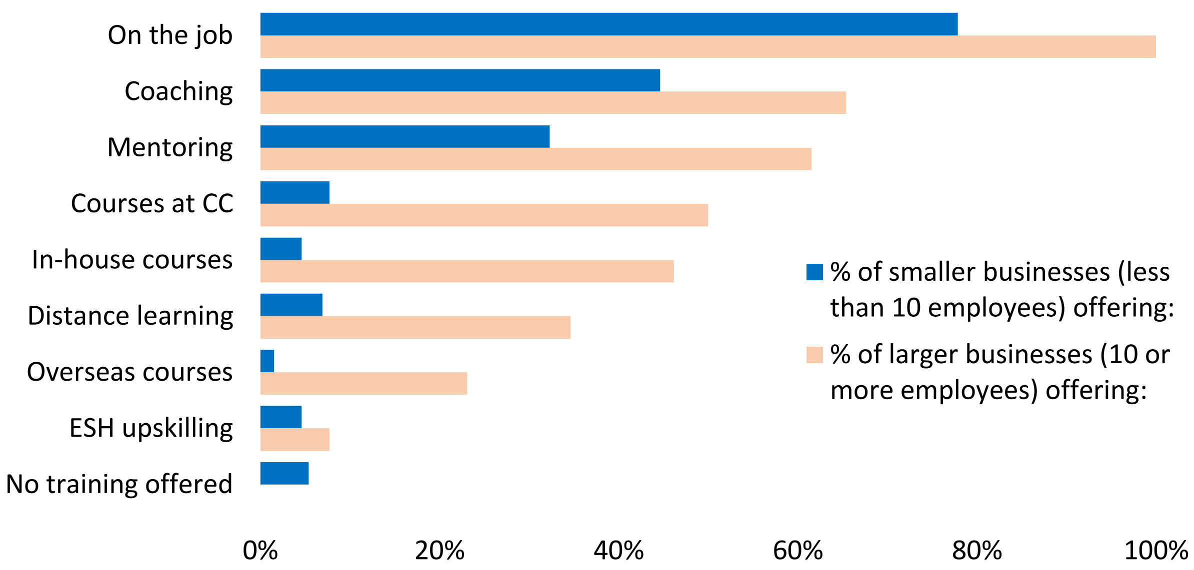
Chart 25. Benefits provided by businesses, as percentage of total businesses within each size group



F. Staff development

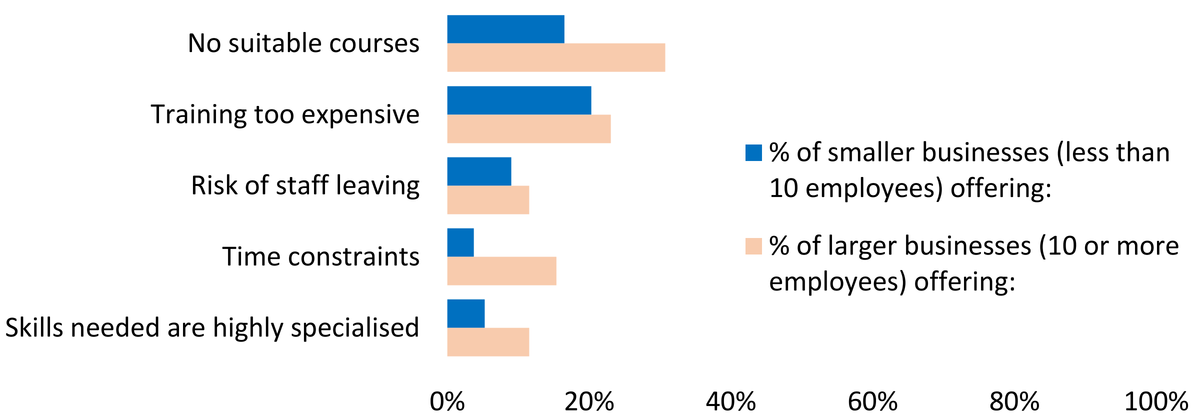
46. All businesses use on-the-job training to develop staff, including coaching and mentoring by other staff. Smaller businesses tend to rely on these almost exclusively, although a small number have used the opportunities provided through the Community College, distance learning, and ESH upskilling programs. Larger businesses tend to make much more use of these opportunities, with over 50% reporting that they used the Community College. Larger businesses also organize their own training programs, through in-house courses and distance learning. Around a quarter of larger businesses also use courses overseas.

Chart 26. Methods of staff development used, percent of each group



47. Businesses reported that the lack of suitable courses and the cost of training (including the internet costs of distance learning) are the two biggest constraints to staff development. But around 50% of all businesses did not report any constraint.

Chart 27. Constraints reported to providing staff development and training, percent of each group.



Annex 1. Questionnaire

St Helena Government

Identification:	
Date of delivery:	

Confidential

2018 Business Survey

The purpose of this survey is to collect important information about the business environment, the labour market, and the economy on St Helena, to help guide policy-making and development. Your help is greatly appreciated.

The survey is being conducted under the authority of the 2000 Statistics Ordinance CAP 159, and it is compulsory; it is a legal obligation to accurately complete this form. The information you provide is confidential, and it will be used for statistical purposes only.

Instructions

This questionnaire should only be completed if your business has employees (full-time, part-time, or temporary) and is not purely a single person working for themselves, or a property rental business. Section G is only required if the business has 10 or more employees.

A. About the business

B. The people who work in the business

C. Staff recruitment

D. The business environment

E. Leave and benefits

F. Staff development

G. Income and expenses (required for businesses with 10 employees or more)

H. Other comments

Most businesses will need to complete only one survey. However, if different parts of the business conduct different activities for which separate accounts are compiled and submitted to the Income Tax Office, please complete a survey form for each of these entities.

Please complete and return the form as soon as possible, and no later than November 8, 2018. Please contact the Statistics Office in The Castle, Jamestown if you would like help completing this form or have questions or comments; telephone 22138, or email statistics@sainthelena.gov.sh.

SECTION A: ABOUT THE BUSINESS

A1. What is the name of the business to which this questionnaire refers?

A2. Please describe what this business does:

A3. How many years has this business been operating?

A4. Please provide the name, address, telephone number and email of the person completing this form.

A5. Please identify the industry of this business.

If more than one industry is relevant, please estimate the approximate percentage of revenue for each (otherwise just enter ‘100%’ against the main industry)

Industry	**Percent of revenue**
A. Agriculture and forestry	
B. Fishing	
C. Construction	
D. Mining and quarrying	
E. Electricity or water supply	
F. Wholesale and retail trade (including vehicle repair)	
G. Public administration	
H. Accommodation and food services	
I. Transport and storage	
J. Information and communication (including media)	
K. Financial and insurance services	
L. Business services	
M. Community, social and personal services	
N. Other (please state)	

SECTION B. THE PEOPLE WHO WORK IN THE BUSINESS

B1. What is the total number of people, both part-time and full-time, that worked in this business at the end of March 2016, 2017 and 2018, and how many do you expect to be working in this business at the end of March 2019 and 2020?

End of March 2016	End of March 2017	End of March 2018	End of March 2019	End of March 2020

B2. How many people were working for this business at the end of March 2018?

	Male	Female	Total
Full-time			
Part-time			

B3. Please provide details about each of the employee positions in this business, and state whether these positions require skilled or unskilled workers (an example is provided)

Positon title	Full time in post	Part time in post	Number of vacancies	Skilled or unskilled
Shop Assistant	5	2	2	Unskilled

B3 continued. Please provide details about each of the employee positions in this business

Positon title	Full time in post	Part time in post	Number of vacancies	Skilled or unskilled

SECTION C. STAFF RECRUITMENT

C1. If there are occupations that are important to the success of this business but where it is difficult to recruit staff with suitable skills, please indicate the difficulty of recruitment and the impact on the business (an example is provided)

Area or occupation	Difficulty to recruit (minor, moderate, or severe)	Impact on this business (minor, moderate, or severe)
Carpenters	Moderate	Severe

C2. How many vacancies were filled between April 2017 and March 2018, and how many will need to be filled altogether between April 2018 and March 2019? (an example is provided)

Position	Number of staff who left in 2017/18	Posts filled in 2017/18	Posts to be filled in 2018/19
Clerks	3	2	1

SECTION D. THE BUSINESS ENVIRONMENT

D1. Please estimate the change to the size of the workforce you expect between April 2018 and March 2019.

A. Number of new staff positions	
B. Number of staff reductions	

D2. Please indicate which statements about the business environment you agree with (mark with an 'X' all that apply):

A. The demand for this business is increasing	
B. The demand for this business is decreasing	
C. The demand for this business is unchanged	
D. The costs of running this business are increasing	
E. The costs of running this business are increasing dramatically	
F. I am able to reduce the cost of running this business in some areas	
G. There are new opportunities for this business to grow	
H. I will be expanding this business into new areas	

D3. If there are other changes to the business environment that we have not listed, please tell us about those in the box below:

D4. Please describe the main constraints or barriers to developing this business?

SECTION E. LEAVE AND BENEFITS

E1. How much paid leave is provided to employees of this business?

	Number of days per year
A. Annual leave	
B. Sick leave	
C. Maternity leave	
D. Paternity leave	
E. Compassionate leave	

E2. What other benefits do you provide to your employees? Please indicate with ‘X’

A. Transport to and from work	
B. Medical insurance	
C. Clothing, such as a uniform	
D. Pension contributions	
E. Bonuses for performance	
F. Rewards for long service	
G. Loans	
H. Discounts	
I. Flexitime working arrangements	
J. Time off in lieu	
K. Any other benefits (please state)	

SECTION F. STAFF DEVELOPMENT

F1. What methods are used to train and develop staff in this business (Please indicate with “X” all that apply).

A. On the job learning	
B. Mentoring by staff	
C. Coaching by managers	
D. Courses delivered ‘in house	
E. Courses at the Community College	
F. Online/distance learning	
G. Courses overseas	
H. None	
I. Other (please state):	

F2. What are the constraints to providing staff development and training within your business (please indicate with ‘X’ all that apply)?

A. It costs too much	
B. The risk that trained staff will leave is high	
C. There are no suitable courses or other reasons (please explain below)	

SECTION G. INCOME AND EXPENSES

Please complete this section only if your business has at least 10 employees

Responses to this section should cover the 2017/18 financial year, i.e. April 2017 to March 2018. However, if you are only able to provide information for a different time period, please indicate this period below.

Date from:	
Date to:	

Please provide the total value of:

G1. Sales of goods and services	£
G2. Income from interest and dividends from investments	£
G3. Amounts from government to subsidize your costs	£
G4. Wages and salaries of employees and directors	£
G5. Pension contributions for employees and directors	£
G6. Goods and services purchased	£
G7. Interest and dividend payments made	£
G8. Road tax paid on vehicles used in the business	£
G9. Other taxes paid relating to the business	£

(in G9, please exclude import duties, service taxes, corporate and income taxes, and capital gains taxes)

G10. Stocks held at the start of the period	£
G11. Stocks held at the end of the period	£
G12. The cost of acquisitions of fixed assets	£

(in G12, please include vehicles, plant and machinery, construction, computer hardware, professional fees associated with construction, such as design costs)

G13. Any proceeds from disposals of fixed assets	£
G14. Depreciation or amortization of your assets	£

(in G14, include write-offs/write-downs, excluding any provisions)

SECTION H. OTHER COMMENTS

H1. Please provide any other comments that you would like us to know about this business or the current business environment.

Thank you for completing this form

Annex 2. Reference tables

A. About the business

Table A1. Number of businesses responding by industry grouping and size of business at end 17/18

Industry grouping	Up to 5 employees	5 to 9 employees	Ten or more employees	Total
A Agriculture, forestry, fishing	4	7	4	15
B-E Quarrying, manufacturing, electricity, water and sanitation	1	1	8	10
F Construction	11	3	20	34
G-H Wholesale and retail trade, repair of motor vehicles, transportation	8	10	26	44
I Accommodation and food service activities	12	4	13	29
J-L Finance, insurance, information, communication, real estate	0	3	3	6
M-S All other service activities	2	5	14	21
Total	38	33	88	159

Table A2. Number of businesses by age of business

Age of business (number of years of operation)	Number
2 or less	22
3-4	16
5-9	33
10-19	46
20+	42
Total	159

B. The people who work in the business

Table B1. Number of employees reported by industry at end of each financial year (18/19 and 19/20 are predicted).

Industry grouping	15/16	16/17	17/18	18/19	19/20
A Agriculture, forestry, fishing	58	56	67	73	74
B-E Quarrying, manufacturing, electricity, water and sanitation	117	120	126	126	129
F Construction	212	230	221	148	147
G-H Wholesale and retail trade, repair of motor vehicles, transportation	582	582	580	556	551
I Accommodation and food service activities	86	98	174	170	171
J-L Finance, insurance, information, communication, real estate	109	107	101	93	94
M-S All other service activities	150	154	175	147	146
Total	1,314	1,347	1,444	1,313	1,312

Table B2. Businesses by reported number of employees at end of each financial year (18/19 and 19/20 are predicted).

Number of employees	15/16	16/17	17/18	18/19	19/20
1-4	82	85	96	86	84
5-9	31	33	37	39	37
10-14	8	9	7	5	6
15-19	5	5	5	3	3
20+	13	13	14	13	13
Not stated	20	14	0	13	16
Total	159	159	159	159	159

Table B3. Number of employees in each industry, by size of business at end 17/18

Industry	Up to 5 employees	5 to 9 employees	Ten or more employees	Total
Agriculture, forestry, fishing	12	21	34	67
Quarrying, manufacturing, electricity, water and sanitation	4	70	52	126
Construction	43	13	165	221
Wholesale and retail trade, repair of motor vehicles, transportation	25	30	525	580
Accommodation and food service activities	105	15	54	174
Finance, insurance, information, communication, real estate	0	43	58	101
All other service activities	7	23	145	175
Total	196	215	1,033	1,444

Table B4. Number of employees by industry and male/female, end 2017/18

Industry	Male	Female	Total
Agriculture, forestry, fishing	34	7	41
Quarrying, manufacturing, electricity, water and sanitation	102	24	126
Construction	203	14	217
Wholesale and retail trade, repair of motor vehicles, transportation	248	320	568
Accommodation and food service activities	83	92	175
Finance, insurance, information, communication, real estate	44	57	101
All other service activities	54	119	173
Total	768	633	1,401

Note: compiled from question B2; 43 persons were not classified by sex, compared to question B1.

Table B5. Number of employees by industry and full-time or part-time, end 2017/18

Industry	Full-time	Part-time	Total
Agriculture, forestry, fishing	22	19	41
Quarrying, manufacturing, electricity, water and sanitation	114	12	126
Construction	196	21	217
Wholesale and retail trade, repair of motor vehicles, transportation	472	96	568
Accommodation and food service activities	125	50	175
Finance, insurance, information, communication, real estate	79	22	101
All other service activities	133	40	173
Total	1,141	260	1,401

Note: compiled from question B2; 43 persons were not classified by full-time or part-time, compared to question B1.

Table B6. Number of employees by occupation group and full-time or part-time

Occupation	**Full-time**	**Part-time**	**Total**
1 Managers	152	6	158
2 Professionals	45	3	48
3 Technicians and Associate Professionals	124	4	128
4 Clerical Support Workers	109	12	121
5 Services and Sales Workers	257	104	361
6 Skilled Agricultural, Forestry and Fishery Workers	17	4	21
7 Craft and Related Trades Workers	200	10	210
8 Plant and Machine Operators and Assemblers	77	16	93
9 Elementary Occupations	210	96	306
	1,191	255	1,446

Note: Complied from question B3, which asked for current positions, rather than positions at end of 17/18 asked in questions B1 and B2. Also, vacancies reported in question B3 have not been tabulated since only current vacancies were reported.

Table B7. Number of employees by detailed occupation in private sector businesses, at time of survey (November 2018)

Occupation	Total
1 Managers	**158**
Managing Directors and Chief Executives	15
Business Services and Administration Managers	46
Sales, Marketing and Development Managers	6
Manufacturing, Mining, Construction and Distribution Managers	31
Professional Services Managers	5
Hotel and Restaurant Managers	18
Retail and Wholesale Trade Managers	27
Other managers	7
2 Professionals	**48**
Life Science Professionals	17
Architects, Planners, Surveyors and Designers	12
Finance Professionals	5
Other professionals	14
3 Technicians and Associate Professionals	**128**
Physical and Engineering Science Technicians	7
Process Control Technicians	20
Financial and Mathematical Associate Professionals	7
Sales and Purchasing Agents and Brokers	10
Administrative and Specialized Secretaries	54
Legal, Social and Religious Associate Professionals	8
Artistic, Cultural and Culinary Associate Professionals	13
Information and Communications Technology Operations, User Support Technicians	7
Other Technicians and Associate Professionals	2
4 Clerical Support Workers	**121**
General Office Clerks	43
Tellers, Money Collectors and Related Clerks	33
Client Information Workers	15
Numerical Clerks	12
Material Recording and Transport Clerks	17
Other Clerical Support Workers	1
5 Services and Sales Workers	**361**
Cooks	20
Waiters and Bartenders	45
Hairdressers, Beauticians and Related Workers	6
Building and Housekeeping Supervisors	17
Other Personal Services Workers	10

Occupation	Total
Shop Salespersons	187
Cashiers and Ticket Clerks	7
Other Sales Workers	23
Child Care Workers and Teachers' Aides	26
Protective Services Workers	20
6 Skilled Agricultural, Forestry and Fishery Workers	**21**
Market Gardeners and Crop Growers	11
Animal Producers	7
Oher Skilled Agricultural, Forestry and Fishery Workers	3
7 Craft and Related Trades Workers	**210**
Building Frame and Related Trades Workers	81
Building Finishers and Related Trades Workers	14
Sheet and Structural Metal Workers, Moulders and Welders, and Related Workers	7
Machinery Mechanics and Repairers	39
Electrical Equipment Installers and Repairers	18
Electronics and Telecommunications Installers and Repairers	7
Food Processing and Related Trades Workers	35
Other Craft and Related Trades Workers	9
8 Plant and Machine Operators and Assemblers	**93**
Textile, Fur and Leather Products Machine Operators	7
Car, Van and Motorcycle Drivers	30
Heavy Truck and Bus Drivers	28
Mobile Plant Operators	10
Ships' Deck Crews and Related Workers	12
Other Plant and Machine Operators and Assemblers	6
9 Elementary Occupations	**306**
Domestic, Hotel and Office Cleaners and Helpers	60
Agricultural, Forestry and Fishery Labourers	36
Mining and Construction Labourers	119
Transport and Storage Labourers	35
Food Preparation Assistants	22
Other Elementary Workers	34
Total	**1,446**

Notes: This table uses the "Minor Groups" (3-digit level) of the International Standard Classification of Occupations (ISCO). Minor Groups with less than five employees have been tabulated in the "other" categories.

C. Staff recruitment

Table C1. Number of businesses reporting recruitment difficulties at time of survey (November 2018), by occupation

	Recruitment difficulty			Impact on business		
	Minor	Mod-erate	Severe	Minor	Mod-erate	Severe
1 Managers	**-**	**2**	**3**	**-**	**-**	**5**
Administrative and Commercial Managers	-	1	-	-	-	1
Production and Specialized Services Managers	-	1	1	-	-	2
Hospitality, Retail and Other Services Managers	-	-	2	-	-	2
2 Professionals	**1**	**7**	**4**	**1**	**4**	**7**
Science and Engineering Professionals	-	3	1	-	2	2
Business and Administration Professionals	-	2	-	-	1	1
Information and Communications Technology Professionals	-	2	1	-	1	2
Legal, Social and Cultural Professionals	1	-	2	1	-	2
3 Technicians and Associate Professionals	**-**	**1**	**9**	**-**	**1**	**9**
Science and Engineering Associate Professionals	-	-	1	-	-	1
Health Associate Professionals	-	-	1	-	-	1
Legal, Social, Cultural and Related Associate Professionals	-	-	6	-	-	6
Information and Communications Technicians	-	1	1	-	1	1
4 Clerical Support Workers	**-**	**2**	**3**	**-**	**1**	**4**
General and Keyboard Clerks	-	-	1	-	-	1
Customer Services Clerks	-	1	1	-	1	1
Numerical and Material Recording Clerks	-	1	1	-	-	2
5 Services and Sales Workers	**1**	**16**	**10**	**-**	**10**	**16**
Personal Services Workers	1	9	6	-	5	10

	Recruitment difficulty			Impact on business		
	Minor	Mod-erate	Severe	Minor	Mod-erate	Severe
Sales Workers	-	4	3	-	4	3
Personal Care Workers	-	3	-	-	1	2
Protective Services Workers	-	-	1	-	-	1
6 Skilled Agricultural, Forestry and Fishery Workers	**-**	-	**2**	**-**	**1**	**2**
Market-oriented Skilled Agricultural Workers	-	-	2	-	1	1
Market-oriented Skilled Forestry, Fishery and Hunting Workers	-	-	-	-	-	1
7 Craft and Related Trades Workers	**-**	**6**	**9**	**1**	**3**	**14**
Building and Related Trades Workers (excluding Electricians)	-	4	6	1	1	8
Metal, Machinery and Related Trades Workers	-	2	2	-	2	4
Electrical and Electronics Trades Workers	-	-	1	-	-	2
Food Processing, Woodworking, Garment and Other Craft and Related Trades Workers	1	4	2	-	3	3
8 Plant and Machine Operators and Assemblers	**-**	**1**	**1**	**-**	**1**	**2**
Drivers and Mobile Plant Operators	-	1	1	-	1	2
9 Elementary Occupations	**-**	**8**	**4**	**-**	**6**	**7**
Cleaners and Helpers	-	3	2	-	2	3
Agricultural, Forestry and Fishery Labourers	-	2	-	-	1	1
Labourers in Mining, Construction, Manufacturing and Transport	-	2	1	-	2	2
Food Preparation Assistants	-	1	1	-	1	1

Note: This table uses the “Sub-major Groups” (2 digit level) of the International Standard Classification of Occupations (ISCO).

Table C2. Staff turnover by major occupation group: number of positions

	Staff departures 17/18	Posts filled in 17/18	Posts to be filled in 18/19
1 Managers	9	7	1
2 Professionals	10	10	2
3 Technicians and Associate Professionals	11	15	4
4 Clerical Support Workers	19	20	4
5 Services and Sales Workers	57	41	24
6 Skilled Agricultural, Forestry and Fishery Workers	2	1	1
7 Craft and Related Trades Workers	11	8	2
8 Plant and Machine Operators and Assemblers	9	7	5
9 Elementary Occupations	45	39	11
Total	173	148	54

D. The Business Environment

Table D1. Reported anticipated workforce changes in 2018/19 by industry group, number of positions

Industry	New staff positions	Staff reductions
Agriculture, forestry, fishing	11	3
Quarrying, manufacturing, electricity, water and sanitation	5	4
Construction	12	16
Wholesale and retail trade, repair of motor vehicles, transportation	18	21
Accommodation and food service activities	17	19
Finance, insurance, information, communication, real estate	1	13
All other service activities	18	6
Total	82	82

Table D2. Changes in the business environment, number of businesses reporting

Industry	Demand increasing	Demand decreasing	Demand unchanged	Costs increasing	Costs up dramatically	Able to reduce costs	New growth opportunities	Expanding in new areas
Agriculture, forestry, fishing	7	1	5	11	5	2	10	5
Quarrying, manufacturing, electricity, water and sanitation	3	2	5	6	4	2	7	3
Construction	6	15	13	18	15	1	9	11
Wholesale and retail trade, repair of motor vehicles, transportation	17	10	16	31	13	9	25	14
Accommodation and food service activities	7	14	6	19	18	2	11	5
Finance, insurance, information, communication, real estate	2	1	3	5	2	1	5	3
All other service activities	12	4	4	13	9	6	13	8
Total	54	47	52	103	66	23	80	49

Table D3. The main constraints or barriers to developing this business (number and percent of businesses reporting)

Category	Number	Percent %
Low demand for products or services	33	20.8
General high costs	19	11.9
High cost of utilities	16	10.1
Staffing issues	14	8.8
Availability of land	13	8.2
"Government" (regulation, policy, etc.)	13	8.2
Cost of freight	11	6.9
Low tourist numbers	10	6.3
Availability of finance	10	6.3
Competition	8	5.0
Lack of government contracts	5	3.1
Shipping schedule	3	1.9
Telecommunications	3	1.9
Postal service	2	1.3
Parking	2	1.3
Supply of fresh food	2	1.3
Other	4	2.5

E. Leave and Benefits

Table E1. Paid leave (employees receiving, end 17/18)

	Smaller businesses (less than 10 employees)	Larger businesses (10 or more employees)	All businesses
Annual leave			
1 to 5 days	34	45	79
6 to 20 days	200	350	550
More than 20 days	50	538	588
Discretionary	70	-	70
Casual workers only (or only public holidays)	80	12	92
No policy stated	51	14	65
Sick leave			
1 to 5 days	62	375	437
6 to 20 days	169	325	494
More than 20 days	31	218	249
Discretionary	103	15	118
Business employs casual workers only	62	12	74
No policy stated	58	14	72
Maternity leave			
1 to 6 days	31	41	72
1 week to 3 months	49	539	588
More than 3 months	10	156	166
Discretionary	37	-	37
Business employs casual workers only	71	12	83
No policy stated	287	211	498
Paternity leave			
1 to 6 days	44	204	248
1 week to a month	26	568	594
Discretionary	46	36	82
Business employs casual workers only	71	12	83
No policy stated	298	139	437
Compassionate leave			
1 to 6 days	65	605	670
1 week to a month	15	137	152
Discretionary	151	96	247
Not applicable - casual workers only	68	12	80
No policy stated	186	109	295

Table E2. Paid leave (number of business reporting)

	Smaller businesses (less than 10 employees)	Larger businesses (10 or more employees)	All businesses
Annual leave			
1 to 5 days	8	3	11
6 to 20 days	53	12	65
More than 20 days	11	9	20
Discretionary	20	-	20
Casual workers only (or only public holidays)	26	1	27
No policy stated	15	1	16
Sick leave			
1 to 5 days	15	7	22
6 to 20 days	41	9	50
More than 20 days	7	7	14
Discretionary	30	1	31
Casual workers only	23	1	24
No policy stated	17	1	18
Maternity leave			
1 to 6 days	7	2	9
1 week to 3 months	9	8	17
More than 3 months	2	5	7
Discretionary	10	-	10
Casual workers only	24	1	25
No policy stated	81	10	91
Paternity leave			
1 to 6 days	10	7	17
1 week to a month	6	10	16
Discretionary	11	1	12
Casual workers only	24	1	25
No policy stated	82	7	89
Compassionate leave			
1 to 6 days	15	12	27
1 week to a month	5	3	8
Discretionary	41	4	45
Not applicable - casual workers only	23	1	24
No policy stated	49	6	55

Table E3. Staff benefits, employees entitled to, end 17/18

	Smaller businesses (less than 10 employees)	Larger businesses (10 or more employees)	All businesses
Flexible working hours	315	481	796
Transport to/from work	226	791	1,017
Clothing	223	833	1,056
Time off in lieu (TOIL)	161	742	903
Bonuses	163	576	739
Discounts	84	496	580
Pension	16	613	629
Loans	48	500	548
Rewards	19	418	437
Medical insurance	75	104	179

Note: Three smaller businesses did not respond to this question; the number of smaller business responding was 130, and the total number responding was 156.

Table E4. Staff benefits, number of businesses reporting

	Smaller businesses (less than 10 employees)	Larger businesses (10 or more employees)	All businesses
Flexible working hours	82	16	98
Transport to/from work	59	20	79
Clothing	54	18	72
Time off in lieu (TOIL)	39	16	55
Bonuses	42	10	52
Discounts	20	9	29
Pension	5	10	15
Loans	9	7	16
Rewards	5	6	11
Medical insurance	18	3	21

Note: Three smaller businesses did not respond to this question; the number of smaller business responding was 130, and the total number responding was 156.

F. Staff development

Table F1. Methods used to train and develop staff

	Smaller businesses (less than 10 employees)	Larger businesses (10 or more employees)	All businesses
On the job	102	26	138
Coaching	58	17	75
Mentoring	42	16	68
Courses at Community College	10	13	23
In-house courses	6	12	18
Distance learning	9	9	18
Overseas courses	2	6	8
'Upskilling' by Enterprise St Helena	6	2	8
No training offered	7	-	7

Note: Three smaller businesses did not respond to this question; the number of smaller business responding was 130, and the total number responding was 156.

Table F2. Constraints to providing staff development and training

	Smaller businesses (less than 10 employees)	Larger businesses (10 or more employees)	All businesses
No suitable courses	22	8	30
Training too expensive	27	6	33
Risk of staff leaving	12	3	15
Time constraints	5	4	9
Skills needed are highly specialized	7	3	10
No suitable courses	22	8	30
Training too expensive	27	6	33