



**St Helena
Government**

2019 Business Survey

Report

Statistics Office

12 March 2020

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.

Contents

About this report.....	1
Acknowledgments	1
Survey objective	1
Design	1
Response	2
Classification of businesses	2
Data quality	3
Data processing	3
Results: The Workforce.....	4
Results: The Business Environment.....	9
Annex 1. Questionnaire.....	15
Annex 2. Reference tables	25

Tables and charts

Table 1.	Survey coverage	4
Chart 1.	Distribution of businesses by number of employees at end of March in each year	5
Chart 2.	Number of responding businesses at time of survey by length of operation, years.....	5
Chart 3.	Distribution of businesses by industry at time of survey in each year	6
Chart 4.	Number of employees by industrial sector at end March 2018, 2019 and 2020, for those businesses responding	7
Chart 5.	Number of employees by male/female and industry at end March 2019	7
Chart 6.	Number of employees by full-time/part-time at end March 2019	8
Table 2.	Occupations for which two or more businesses report both moderate or severe recruitment difficulty and moderate or severe impact in either 2018 or 2019 (number of businesses with employees)	9
Chart 7.	Percent of businesses in each industrial sector reporting an increase or decrease in employee numbers by the end of March 2020	10
Chart 8.	Percent of businesses in each industrial sector reporting an increase or decrease in demand	10
Chart 9.	Percent of businesses in each industrial sector reporting an increase or decrease in cost.....	11
Chart 10.	Percent of businesses in each industrial sector reporting increased opportunities for growth	12
Chart 11.	Percent of businesses in each industrial sector reporting that the business is expanding	12
Chart 12.	Main constraints or barriers to running the business (% of businesses with employees reporting)	13
Table A1.	Number of businesses with employees responding by industry grouping and size of business, 2018 and 2019 surveys (size at end of 17/18 and 18/19 respectively)	25
Table A2.	Number of businesses with employees by age of business	25

Table B1. Number of employees reported by industry at end of each financial year, businesses with employees (19/20 are predicted).	26
Table B2. Number of employees in each industry, by size of business at end 18/19 (excludes sole traders)	26
Table B3. Number of employees by industry group and male/female, end 18/19 (excluding sole traders)	27
Table B4. Number of employees by industry and full-time or part-time, end 18/19 (excludes sole traders)	27
Table C1. Number of businesses reporting recruitment difficulties at time of survey (September/October/November 2019), by occupation (excludes sole traders)	28
Table D1. Number of businesses planning to increase or decrease workforce by end March 19/20 by industrial grouping (excludes sole traders)	29
Table D2. Number of businesses reporting increases or decreases in costs by industrial grouping at time of survey	29
Table D3. Number of businesses reporting opportunities for growth by industrial grouping at time of survey	30
Table D4. Number of businesses reporting plans for expansion by industrial grouping at time of survey	30
Table D5. The main constraints or barriers to developing this business (number and percent of businesses reporting at time of survey)	31

2019 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 September and November of 2019, and the target population was all private enterprises on St Helena with employees, including not-for-profit businesses. For 2019, a small sample of self-employed businesses was included on an experimental basis.
2. Previous surveys include the 2018 Business Survey and the 'Private Sector Enterprise Employment Surveys' of 2004 and 2010. This report includes comparisons with the 2018 survey, but not with the 2004 and 2010 surveys as their target population was substantially different (in particular, those surveys included the self-employed).
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. It does include businesses that are owned, either partially or completely, by St Helena Government. These include Solomons PLC, Connect Saint Helena Ltd, St Helena Hotel Development, St Helena Fisheries Corporation, the Bank of St Helena, Bertrand's Cottage, and St Helena Airport.
4. As in 2018, the survey included a specific section (G) designed to obtain information to help compute estimates of various components of Gross Domestic Product (GDP), for larger businesses with 10 employees or more. The data collected in this section will be used in separate publications relating to GDP.

Acknowledgments

5. Special thanks are extended to the businesses who participated in the survey and who took the time to complete the questionnaire. A team at the St Helena Statistics Office 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 business environment in relation to the private sector, and to identify those occupations that are currently hard to recruit and are constraining the private sector (i.e., 'shortage occupations'). The secondary objective was to obtain estimates of components of GDP for larger companies.

Design

7. The 2019 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. Only a 25% sample of sole traders (i.e. companies with no employees) were selected, and their participation was not compulsory.

8. The Statistics Office maintains a Business Register, based largely on data from the Income Tax Office and the company registrar, plus secondary sources. This was used to identify businesses to be included in the survey. Any new businesses identified during the survey period were added to the register.

9. The 2019 survey questionnaire was considerably shorter than the questionnaire used for 2018. Detailed questions on the workforce, including occupations, leave policies, and staff training needs and methods were not included. The questionnaire used is attached at Annex 1; it was available as a paper version or through an on-line survey portal.

10. To publicise the survey and encourage good response, a press release was issued. Enumerators made initial contact with businesses through a visit or telephone call.

Response

11. The total number of responses from businesses with employees was 142, plus 35 sole traders (around 12% of the 298 sole traders listed in the business register of the Statistics Office, and a response rate of 47%). The 2018 survey included 159 businesses (with no sole traders), so this is a slight drop resulting from some apparent 'downsizing' of companies from businesses with employees to sole traders, and some companies who ceased trading. However, there was also a small number of new companies identified, who were included in the 2019 survey.

12. In general, obtaining a good response from businesses was more difficult in 2019 compared to 2018, despite the compulsory nature of the survey. Several follow-up calls were made to business owners who did not complete the survey by the deadline; this process was time consuming and costly. This may partly be due to 'response fatigue' or to the difficulties faced by some businesses in maintaining sufficient demand.

13. Because of the difficulties in obtaining a good response, and because the next Population Census is planned for early 2021, consideration should be given to implementing future Business Surveys on a biennial basis (i.e. every two years). In this case, the next Business Survey would be planned for late 2021.

14. In the next survey, consideration should be given to removing the questions on income and expenditure, since these data (used to calculate Gross Domestic Product) may be better obtained from income tax returns.

15. The inclusion of a sample of sole traders should also be reviewed; very few questions are applicable, responses were relatively costly to collect, and response rate was quite low.

Classification of businesses

16. 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.

17. The first limitation 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 so that there is no industry group that has less than five respondents (see Table 1).

18. The second limitation 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 some operate several activities. In these cases, the business has been classified by the industry that accounts for the largest proportion of turnover, unless responses were obtained from that business based on the different activity units.

19. A second classification of businesses is by size: as for the 2018 survey, 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).

20. The list of occupations which businesses reported as difficult to recruit were classified using the lowest level of the International Standard Classification of Occupations (ISCO 2008), which enables reporting at any of the three higher levels used in the classification.

Data quality

21. Overall data quality in this survey is considered reasonable and similar to the survey in 2018. The survey team focused on ensuring the accuracy of data entered by businesses on the questionnaires, and they cross-checked responses for internal accuracy and against the business register and responses for the previous year. Shortage occupations were coded based on the responses given in the relevant section. In a very few cases, when descriptions were not precise enough, judgement was used to allocate an appropriate code.

Data processing

22. For the 2019 survey respondents had the option to either use the on-line form or complete a paper questionnaire – most used the paper questionnaire, which Statistics Office staff entered into the on-line database. Because the survey was considerably less complex than the 2018 version, the data was analysed using a simple Excel table.

23. The completed dataset consists of 178 business records with around 70 data items for each record, around 12,500 data items. This number of data items captured for this survey was about half of the number captured for the 2018 survey. The final complete data file is maintained in Excel format, and tabulations and analyses were performed in Excel as well.

Results: The Workforce

24. The survey recorded a total private sector workforce (excluding sole traders) of some 1,327 people, smaller than 2018 (1,444) (Table 1). A drop in the labour force is consistent with other trends: an increase in the number of unemployment benefit claimants (from 33 in October 2018 to 57 in October 2019), and a drop in the number of people resident on St Helena, from an estimated 4,465 at the end of October 2018 to 4,358 at the end of October 2019. Nonetheless, it is also possible that a weaker response to the 2019 survey has also contributed slightly to the differences between the 2018 and 2019 results.

25. The change in employment is evident in all sectors except quarrying, manufacturing, electricity, water and sanitation. Employment in Construction businesses fell the most, by around 68 jobs.

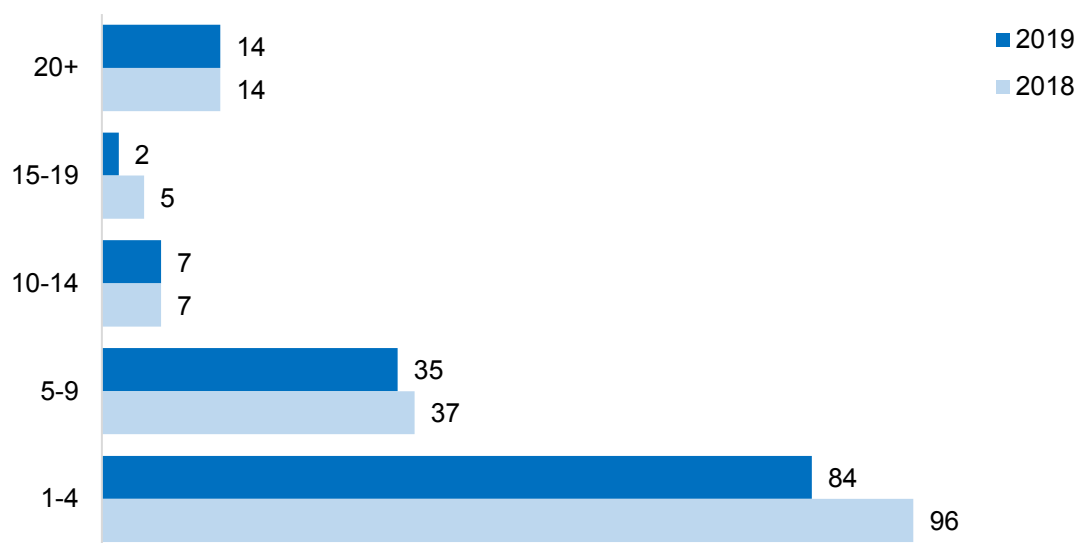
Table 1. Survey coverage

Sector	ISIC Rev 4 Groups	Responses from businesses with employees		Employees in businesses with employees		Sample of sole traders
		2018 ¹	2019	2018 ¹	2019	2019
Agriculture, forestry, fishing	A	14	8	43	26	9
Quarrying, manufacturing, electricity, water and sanitation	B-E	11	14	150	184	4
Construction	F	34	22	221	153	1
Wholesale and retail trade, repair of motor vehicles, transportation	G-H	44	39	580	560	9
Accommodation and food service activities	I	29	27	174	157	3
Finance, insurance, information, communication, real estate	J-L	6	9	101	90	5
All other service activities	M-S	21	23	175	157	4
Total		159	142	1,444	1,327	35

1. A revision has been made to 2018, following the reclassification of a business from ISIC group A to B-E.

26. St Helena's private sector business environment has a large number of small businesses with less than ten employees; only 23 businesses of the 142 surveyed employ ten or more. Most of the private-sector workforce is employed by these larger businesses, some 959 people or two-thirds of the private sector workforce.

Chart 1. Distribution of businesses by number of employees at end of March in each year



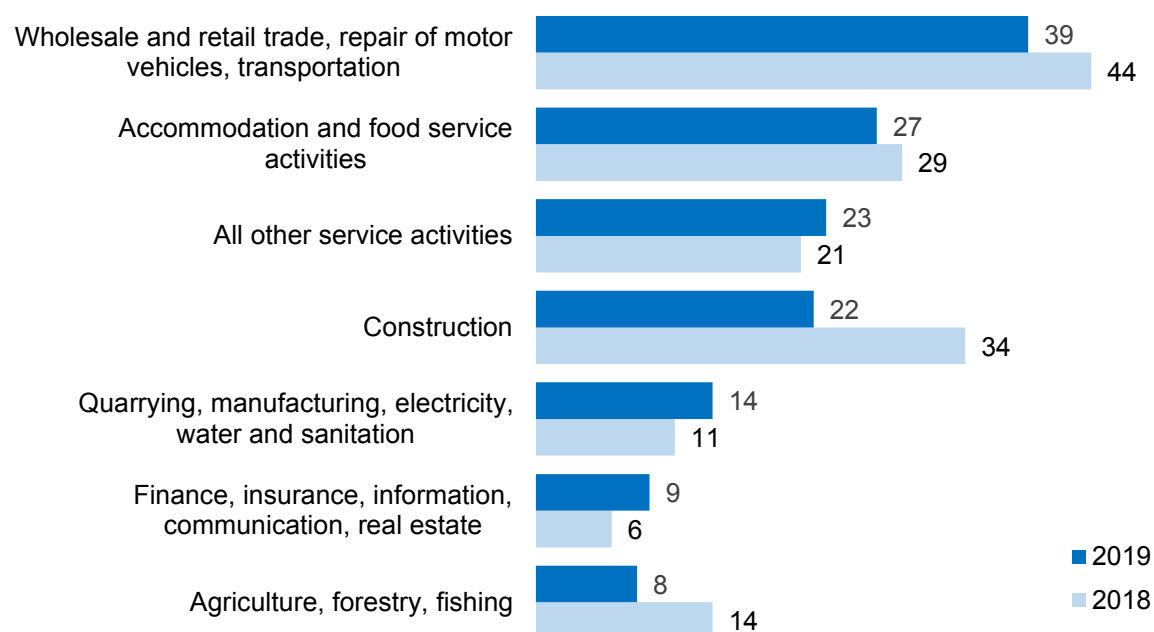
27. Just under half (45%) of all businesses surveyed have been operating for less than ten years, with 23% operating for less than five years (Chart 2). More than a quarter of businesses are well-established, and have been operating for 20 years or more. This pattern is very similar to 2018; there are no major changes apparent.

Chart 2. Number of responding businesses at time of survey by length of operation, years



28. Chart 3 shows the number of businesses by major industrial activity. Most businesses continue to operate in Wholesale and Retail trade, Transportation, and Accommodation and Food services. Sectors with smaller numbers of businesses include Production activities, and technical service industries such as Finance, Insurance, and Communications. The most notable change in the distribution of businesses is the large reduction in the number operating in the Construction sector – from 34 businesses in 2018 to 22 in 2019.

Chart 3. Distribution of businesses by industry at time of survey in each year

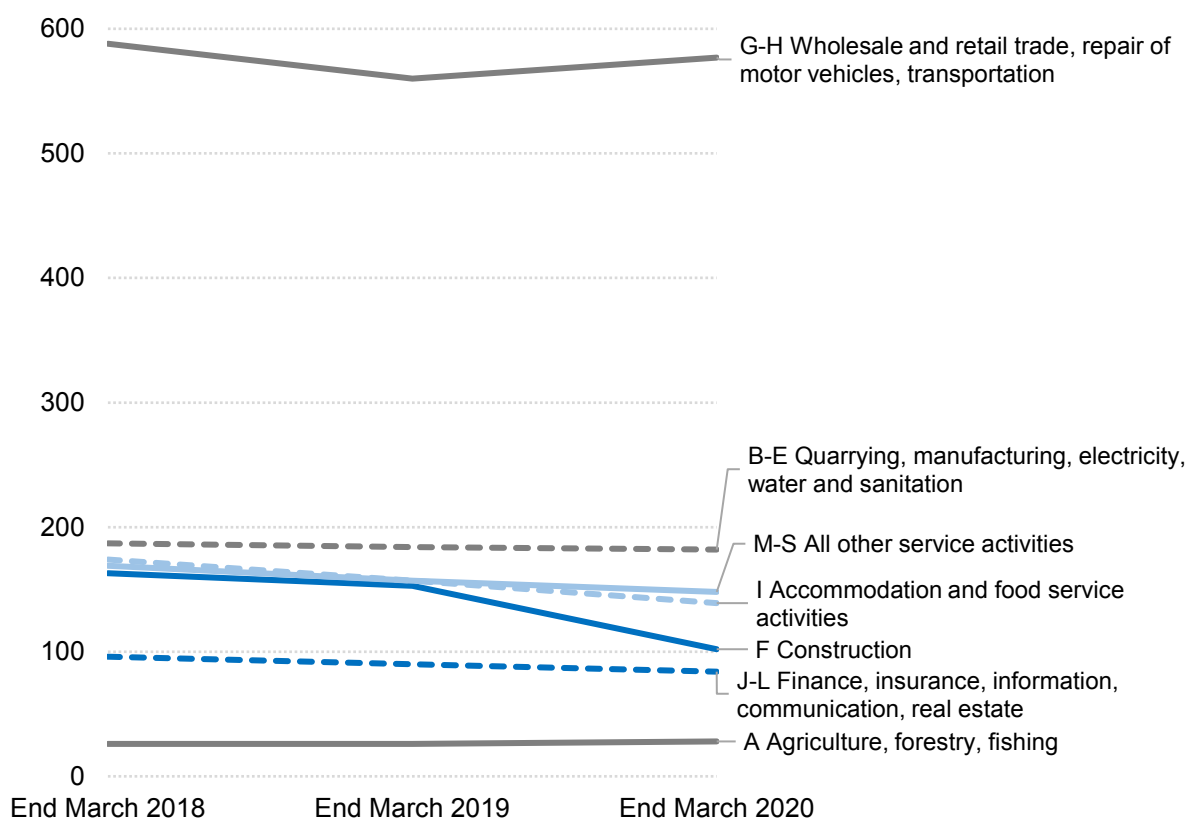


29. Wholesale and Retail activities employ, by far, the most people in private sector businesses with employees; Agriculture, Forestry and Fishing employ the least (Chart 4).

30. Chart 4 also illustrates the trend in employment of those businesses that responded to the survey; businesses were asked to state the number of employees at the end of 2017/18, 2018/19, and 2019/20. It is important to note that businesses that ceased trading in 2017/18 or 2018/19 are not included in these figures and they do not include the number of employees in 2019/20 from businesses that may be formed in that year.

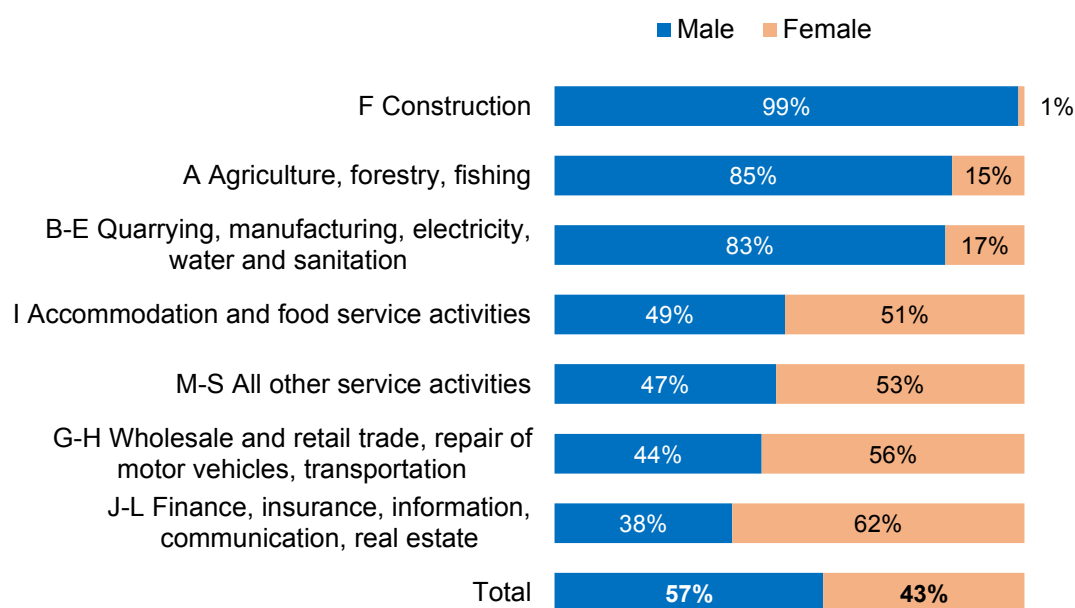
31. Businesses, overall, appear to have employed less people at the end of 2018/19 than at the end of 2017/18, and, in most sectors, they expect to employ less people in 2019/20 than they did in 2018/19. This is most pronounced for businesses in the Construction and Accommodation and Food Service sectors. Businesses in the Wholesale, Retail and Transport sectors and in the Agriculture, Forestry and Fishing sectors are the only ones that, on average, expect to be employing slightly more in 2019/20 than 2018/19.

Chart 4. Number of employees by industrial sector at end March 2018, 2019 and 2020, for those businesses responding



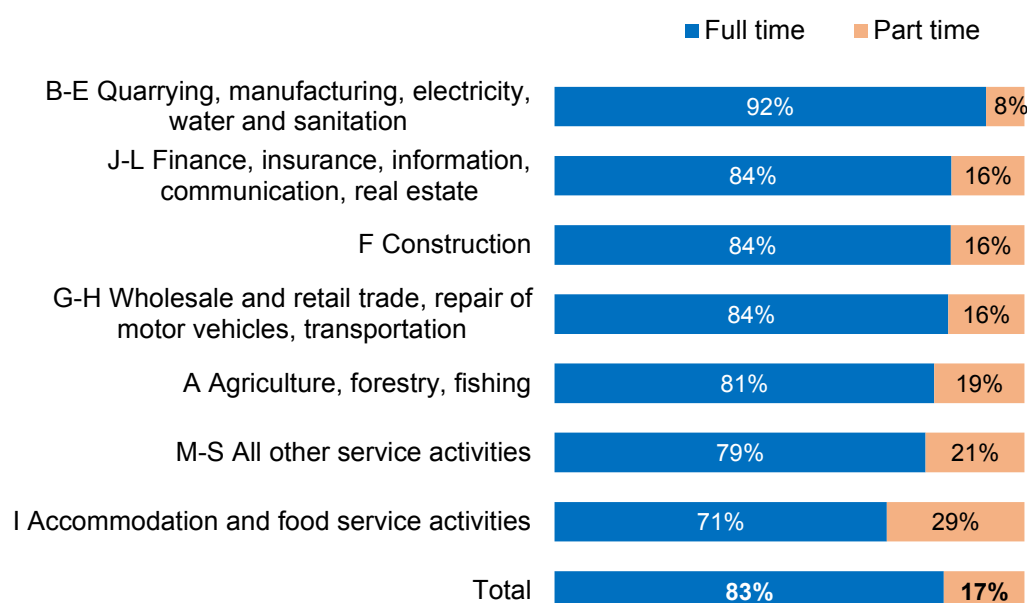
32. The questionnaire also asked businesses to report the number of people working in their business at the end of March 2019 by male/female (Chart 5) and whether they are full-time or part-time (Chart 6).

Chart 5. Number of employees by male/female and industry at end March 2019



33. The pattern is very similar to the 2018 survey. Overall, there are slightly more male workers (57%) than female workers (43%) in the private sector on St Helena. Male workers dominate the Construction, Agriculture, Forestry and Fishing, and Quarrying, Manufacturing and Utilities sectors. In total, there are more female workers in the Wholesale and Retail Trade and Transportation sectors, and in the service industries of Finance, Insurance, Information, Communication and Real Estate. Note that Transport and Motor Vehicle Repair is likely to employ more males than females, although it is included with Retail and Wholesale Trade.

Chart 6. Number of employees by full-time/part-time at end March 2019



34. As in the 2018 survey, part-time workers are evenly spread between industry groups. The Accommodation and Food Service industries employ more part-time workers than other sectors, and Quarrying, Manufacturing, and Utilities employ slightly less.

35. 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 for which at least two businesses reported at least a moderate difficulty in recruitment and at least a moderate impact, in the 2018 or the 2019 survey. For consistency, occupations are coded using the International Standard Classification of Occupations (ISCO), maintained by the International Labour Organisation.

36. Businesses continue to experience recruitment and retention difficulties for several occupations, including in the Accommodation and Food Service industries (e.g. hotel managers, chefs, cooks, waiters and bartenders) and Construction industry (e.g. bricklayers and housebuilders). Other occupations with that are difficult to recruit/retain, and have an impact on the business, include shop sales assistants and cleaners (Table 2).

Table 2. Occupations for which two or more businesses report both moderate or severe recruitment difficulty and moderate or severe impact in either 2018 or 2019 (number of businesses with employees)

Occupation	2018	2019
1 Managers	2	2
Hotel Managers	2	2
2 Professionals	6	5
Accountants	2	1
Authors and Related Writers	1	2
Journalists	1	2
Environmental Protection Professionals	2	0
3 Technicians and Associate Professionals	8	7
Chefs	6	5
Information and Communications Technology User Support Technicians	0	2
Systems Administrators	2	0
4 Clerical Support Workers	2	0
Accounting and Bookkeeping Clerks	2	0
5 Services and Sales Workers	22	11
Cooks	2	1
Food Service Counter Assistants	2	1
Waiters	4	3
Bartenders	4	1
Shop Sales Assistants	5	3
Child Care Workers	3	1
Travel Guides	2	1
6 Skilled Agricultural, Forestry and Fishery Workers	0	0
7 Craft and Related Trade Workers	15	13
Bricklayers and Housebuilders	3	5
Carpenters and Joiners	4	1
Air Conditioning and Refrigeration Mechanics	1	2
Motor Vehicle Mechanics and Repairers	2	1
Welders and Flame cutters	1	2
Butchers, Fishmongers and Related Food Preparers	2	1
Bakers, Pastry-cooks and Confectionery Makers	2	1
8 Plant and Machine Operators and Assemblers	0	0
9 Elementary Occupations	9	3
Civil Engineering Labourers	2	0
Cleaners and Helpers in Offices, Hotels and Other Establishments	5	2
Kitchen Helpers	2	1

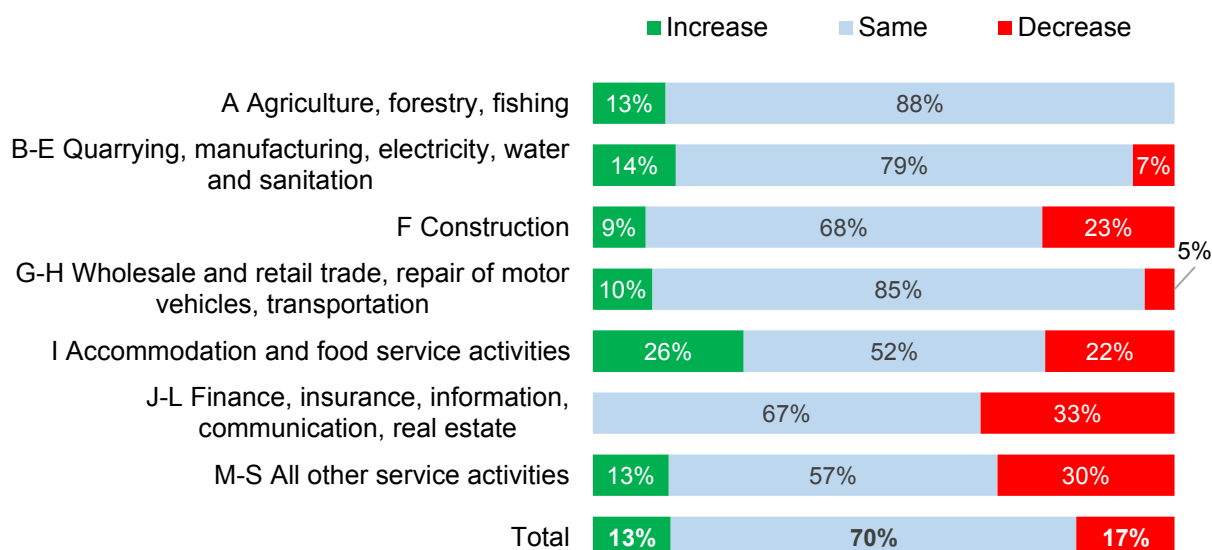
Note: this table uses the 4-digit detailed occupation of the International Standard Classification of Occupations (ISCO).

Results: The Business Environment

37. Although Chart 4 indicates that outlook for private sector businesses in many industries is a reduction in the number of employees and 24 businesses reported that they expect a drop on employment numbers by the end of March 2020, many business (19) reported that they expect an increase in staffing numbers. These include about a quarter of Accommodation and Food Service businesses and about

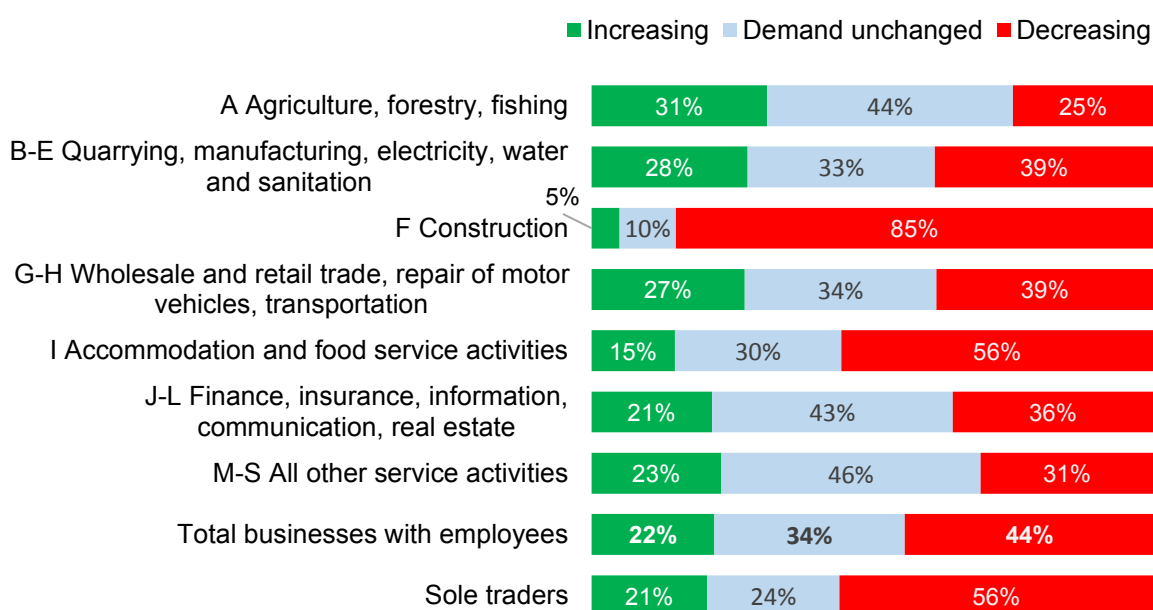
10% of Construction businesses – although a quarter of Construction businesses expect a fall in employment size (Chart 7). In all sectors, however, most businesses expect employment numbers to remain the same.

Chart 7. Percent of businesses in each industrial sector reporting an increase or decrease in employee numbers by the end of March 2020



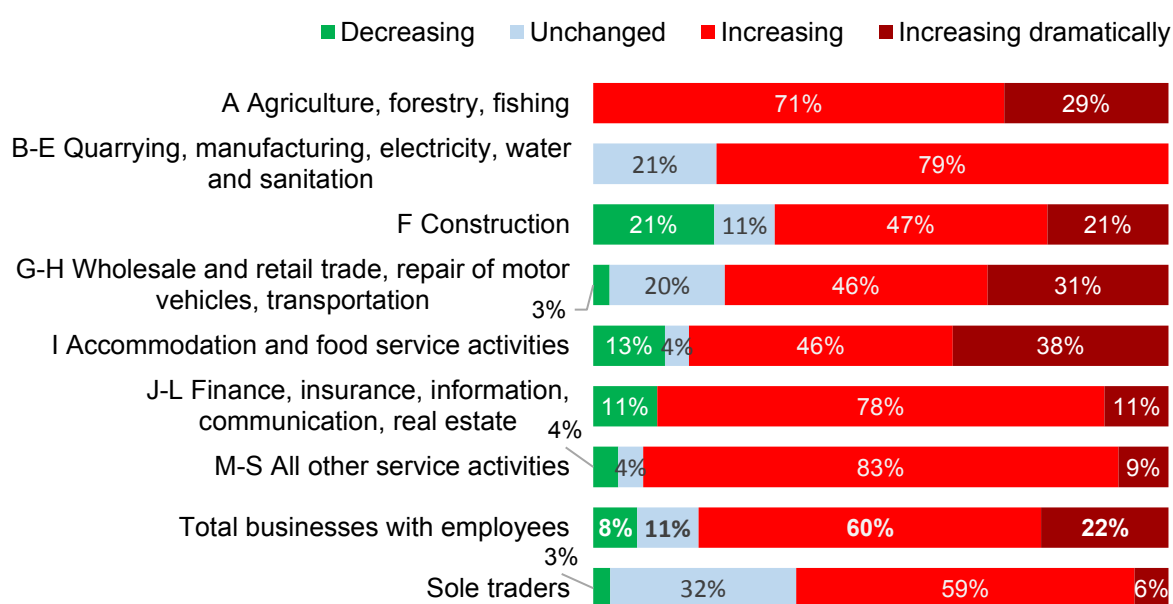
38. Section C of the questionnaire asked businesses (including sole traders) to agree or disagree with several statements about the business environment on St Helena. One set of questions deals with demand (Chart 8).

Chart 8. Percent of businesses in each industrial sector reporting an increase or decrease in demand



39. Around 44% of all businesses reported that demand is decreasing, with 34% indicating unchanged demand and 22% increasing demand. Businesses in the Construction sector seem most affected – 85% of businesses said demand was decreasing. Most Accommodation and Food Service businesses and sole trader businesses (56%) are also experiencing a drop in demand. Agriculture, Forestry and Fishing is the only sector where more businesses report increasing demand compared to decreasing demand, but the difference is quite small: 31% compared to 25%. In St Helena’s largest sector (Wholesaling, Retailing, and Transport), more than a third of businesses are experiencing lower demand – but around a quarter also report higher demand for their products and services.

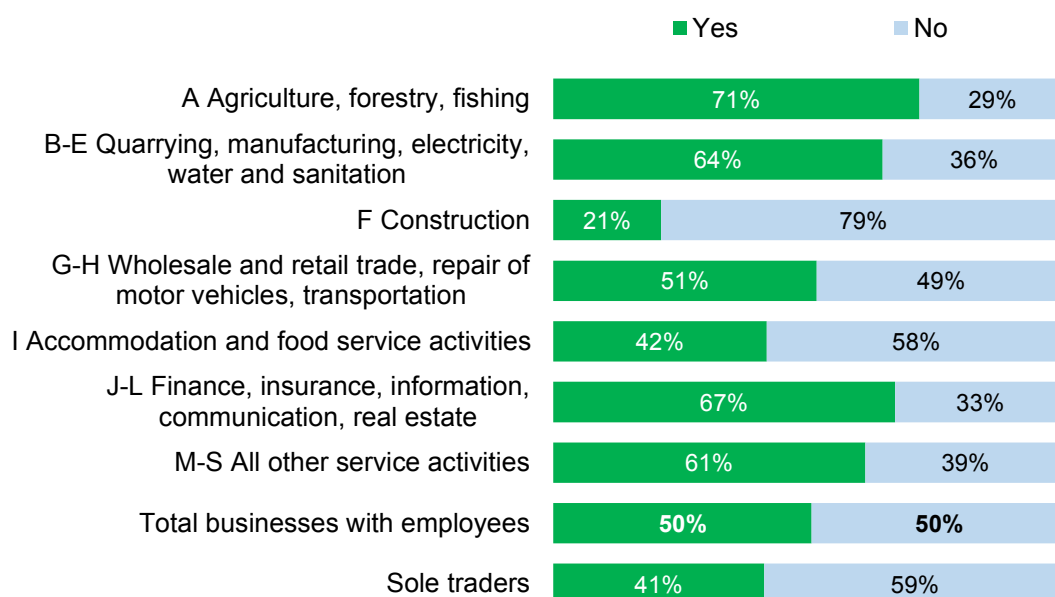
Chart 9. Percent of businesses in each industrial sector reporting an increase or decrease in cost



40. Increasing costs remains one of the biggest issues for businesses in the private sector, with 82% of businesses reporting increasing costs, of which about a quarter reported that costs are increasing dramatically. Somewhat surprisingly, the Construction sector seems slightly less affected – around a fifth of businesses in this sector reported a drop in costs. Almost a third of businesses in the large Retail and Wholesale trade sector and almost 40% of Accommodation and Food Service businesses reported a dramatic increase in costs.

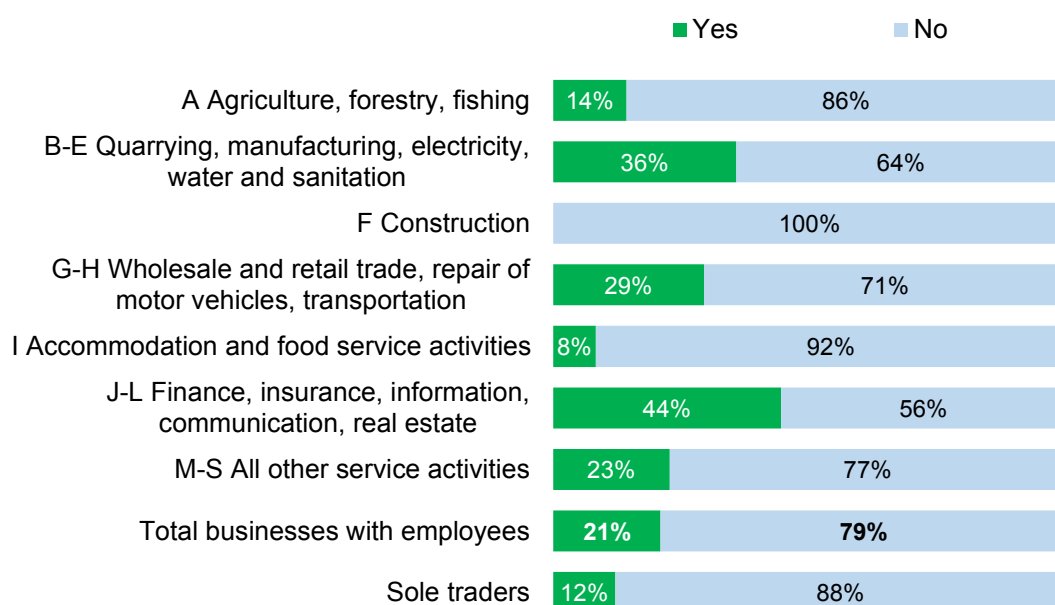
41. Businesses were also asked whether they see opportunities for growth (Chart 10). Overall, responses were evenly split: half see opportunities, but half do not. However some sectors have more than 50% of businesses that see opportunities from growth: Agriculture, Forestry and Fisheries; Quarrying, Manufacturing, and Utilities; Finance, Insurance, Information, Communication, Real Estate, and Other Services. But 79% of businesses in Construction – or four out of every five – and almost 60% of Accommodation and Food Service businesses do not see opportunities for growth.

Chart 10. Percent of businesses in each industrial sector reporting increased opportunities for growth



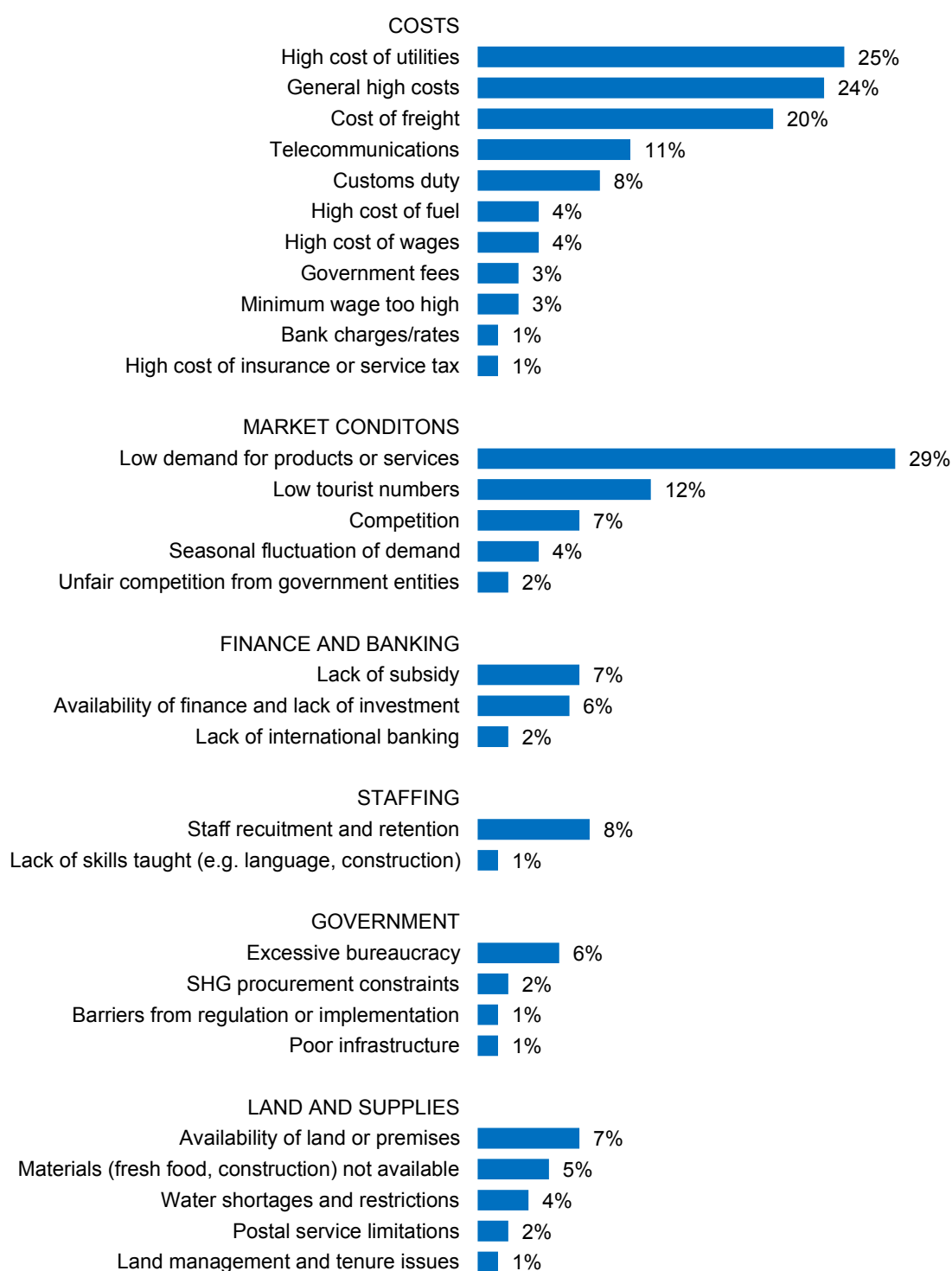
42. Businesses were also asked whether their business was expanding or not (they were not asked, apart from as part of the questions about employment, whether their business was contracting). Most businesses – 79% – said they were not expanding (Chart 11). There were no businesses in the Construction industry that said they were expanding, and only very few (8%) in the Accommodation and Food Services industries. However, 44% of businesses in Financial Services, Information, Communications and Real Estate are expanding, and 36% of businesses in Quarrying, Manufacturing, and Utilities.

Chart 11. Percent of businesses in each industrial sector reporting that the business is expanding



43. Each of the questions about the business environment has an open-ended question for businesses to provide more information, plus a separate open-ended question asking businesses to list their main constraints. These have been combined and classified in Chart 12 using a similar schematic to the one used in 2018, although slightly more detail has been used to try to improve understanding.

Chart 12. Main constraints or barriers to running the business (% of businesses with employees reporting)



44. Reported constraints are similar to those in 2018, with several businesses constrained by high costs, particularly of utilities, freight, customs duty and communications. Low demand (including a small tourism market) and increased competition are also very significant constraints in the private sector. Other constraints mentioned by several businesses include staff recruitment and retention, lack of finance, investment and government subsidy, availability of land or premises, excessive 'red tape' of government, and problems with consistent supply, either locally (such as fresh vegetables and meat) or via air and sea freight or postal services.

Annex 1. Questionnaire



**St Helena
Government**

Identification:

Date of delivery:

Confidential

2019 Business Survey

SCHEDULE A

The purpose of this annual 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

All selected businesses operating on St Helena are required to complete this survey, which has two parts, Schedule A (employment and the business environment) and Schedule B (income and expenses). Schedule A includes the following sections:

- A. About the business
- B. The people who work in the business (only required for businesses with employees)
- C. The business environment
- D. Other comments

Most businesses will need to complete only one Schedule A. However, if different parts of the business conduct different activities and they operate separately within your business (for example, compiling separate sets of accounts), please complete a separate Schedule A for each of these entities.

Please complete and return this form as soon as possible, and no later than October 25, 2019. 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. You may also complete this survey on line at:

<https://www.surveymonkey.com/r/SH-2019-Business-Survey>

SECTION A: ABOUT THE BUSINESS

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

A2. Please describe what this business does:

A3. How many complete years has this business been operating?

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

A5. Please estimate the approximate percentage of revenue gained from each industry. If the business operates in one main industry only, write '100' in the appropriate box. If the business operates in more than one industry, please estimate the approximate percentage of revenue for each.

Industry	Percent of revenue
A1. Agriculture	
A2. Forestry	
A3. Fishing	
B. Quarrying	
C. Manufacturing	
D. Electricity supply	
E. Water supply and sewerage	
F. Construction	
G1. Wholesale and retail trade	
G2. Repair of motor vehicles and motorcycles	
H. Transportation and storage	
I1. Accommodation	
I2. Food services	
J. Information and communication (including media)	
K. Financial and insurance services	
L-N. Real estate and professional, scientific, technical, administrative and support services activities	
O. Public administration	
P. Education	
Q. Human health and social work activities	
R. Arts, entertainment and recreation	
S. Other service activities	
Other not stated - please describe:	

SECTION B. THE PEOPLE WHO WORK IN THE BUSINESS

Only complete this section if the business has employees (part-time or full-time). If you are a sole trader (i.e. you work for yourself and you do not employ anyone else), please skip this section and move to Section C on the next page.

B1. How many people were working for this business at the end of March 2019, including any proprietors or Directors?

Full-time, male

Full-time, female

Part-time, male

Part-time, female

B2. What is the total number of people, both part-time and full-time, that worked in this business at the end of March 2018 (i.e. last year)?

--

B3. How many people do you expect to be working in this business at the end of March 2020 (i.e. next year)?

--

B4. Please list up to eight occupations or positions that you find hard to recruit or fill, and for each occupation or position assess the difficulty of recruitment and the impact that a vacancy has on this business.

Position or occupation	Difficulty to recruit (minor, moderate, or severe)	Impact on the business (minor, moderate, or severe)
1.		
2		
3.		
4.		
5.		
6.		
7.		
8.		

SECTION C. THE BUSINESS ENVIRONMENT

C1. The demand for this business is (tick ONE box only):

<input type="checkbox"/>	Increasing
<input type="checkbox"/>	Unchanged
<input type="checkbox"/>	Decreasing

Please provide any comments you have about the demand for this business:

--

C2. The costs of running this business are (tick ONE box only):

<input type="checkbox"/>	Increasing dramatically
<input type="checkbox"/>	Increasing
<input type="checkbox"/>	Unchanged
<input type="checkbox"/>	Decreasing
<input type="checkbox"/>	Decreasing dramatically

Please provide any comments you have about the costs of running this business:

--

C3. Are there new opportunities for this business to grow?

<input type="checkbox"/>	Yes
<input type="checkbox"/>	No

Please provide any comments about new opportunities to grow the business here:

--

C4. Will this business be expanding into new areas?

<input type="checkbox"/>	Yes
<input type="checkbox"/>	No

Please provide any comments about expanding into new areas here:

--

C5. What are the plans for the size of the workforce next year (tick ONE box only)?

<input type="checkbox"/>	Increase: there are plans to recruit more staff
<input type="checkbox"/>	Unchanged: the workforce will stay roughly the same next year
<input type="checkbox"/>	Decrease: there are plans to reduce the size of the workforce next year

Please provide any comments you have about the size of the workforce here:

--

C6. Please list the main barriers and constraints that make it difficult to develop or grow your business:

SECTION D. OTHER COMMENTS

D1. 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



St Helena
Government

Identification:

Date of delivery:

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2019 Business Survey

SCHEDULE B

The purpose of this annual 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

All businesses operating on St Helena, apart from sole traders (persons working for themselves, with no employees), are required to complete this questionnaire. **Sole traders are not required to complete this questionnaire. As an alternative to completing this Schedule, businesses may also submit a copy of their income/expenditure statement for the latest year.**

Schedule B requests information about the income and expenditure of the business. The data provided on this form will be used to calculate various measures of the economy, which will be published according to the requirements of the 2000 Statistics Ordinance CAP 159.

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 separate form for each of these entities.

Please complete and return the form as soon as possible, and no later than October 25, 2019. 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.

Responses to this schedule should cover the 2018/19 financial year, i.e. April 2018 to March 2019. However, if you are only able to provide information for a different time period, please indicate this period below.

Date from:

Date to:

All businesses, please provide the total value of:

INCOME

E1. The sales of goods and services (i.e. business turnover)

£

E2. Any proceeds from the sale or disposal of fixed assets

£

EXPENSES

E3. Total goods and services purchased (including any goods and services purchased for resale)

£

E4. The purchase of goods and services only for resale

£

E5. Wages and salaries of employees and directors, including any pension contributions

£

E6. The cost of acquiring fixed assets, such as vehicles, plant and machinery, computer hardware, and construction costs

£

If your business has ten or more employees, please also answer questions B7 to B13 and provide the value of:

INCOME

E7. Income from interest and dividends from investments

£

E8. Amounts received from government to subsidize your costs

£

EXPENSES

E9. Any interest and dividend payments made

£

E10. Taxes paid relating to the business

£

e.g. road tax paid on vehicles, but not import duties, service taxes, corporate taxes, income taxes, or capital gains taxes

E11. Depreciation or amortization of fixed assets (including any write-offs)

£

STOCKS

E12. Stocks held at the start of the period

£

E13. Stocks held at the end of the period

£

Thank you for completing this form

Annex 2. Reference tables

A. About the business

Table A1. Number of businesses with employees responding by industry grouping and size of business, 2018 and 2019 surveys (size at end of 17/18 and 18/19 respectively)

Industry grouping	Smaller (up to 9 employees)		Larger (ten or more employees)		Total	
	2018	2019	2018	2019	2018	2019
A Agriculture, forestry, fishing	14	8	0	0	14	8
B-E Quarrying, manufacturing, electricity, water and sanitation	7	10	4	4	11	14
F Construction	28	19	6	3	34	22
G-H Wholesale and retail trade, repair of motor vehicles, transportation	38	31	6	8	44	39
I Accommodation and food service activities	26	25	3	2	29	27
J-L Finance, insurance, information, communication, real estate	3	7	3	2	6	9
M-S All other service activities	17	19	4	4	21	23
Total	133	119	26	23	159	142

Table A2. Number of businesses with employees by age of business

Age of business (number of years of operation)	2018	2019
1-4	38	32
5-9	33	31
10-19	46	36
20+	42	43
Total	159	142

B. The people who work in the business

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

Industry grouping	17/18	18/19	19/20
A Agriculture, forestry, fishing	26	26	28
B-E Quarrying, manufacturing, electricity, water and sanitation	187	184	182
F Construction	163	153	102
G-H Wholesale and retail trade, repair of motor vehicles, transportation	588	560	577
I Accommodation and food service activities	174	157	139
J-L Finance, insurance, information, communication, real estate	96	90	84
M-S All other service activities	167	157	147
Total	1,401	1,327	1,259

Note: Employees are allocated to the main industry of their employer

Table B2. Number of employees in each industry, by size of business at end 18/19 (excludes sole trades)

Industry	2 to 5 employees	5 to 9 employees	Ten or more employees	Total
A Agriculture, forestry, fishing	18	8	0	26
B-E Quarrying, manufacturing, electricity, water and sanitation	17	29	138	184
F Construction	47	22	84	153
G-H Wholesale and retail trade, repair of motor vehicles, transportation	57	48	455	560
I Accommodation and food service activities	49	51	57	157
J-L Finance, insurance, information, communication, real estate	13	14	63	90
M-S All other service activities	19	67	71	157
Total	220	239	868	1,327

Note: Employees are allocated to the main industry of their employer

Table B3. Number of employees by industry group and male/female, end 18/19
(excluding sole traders)

Industry	Male	Female	Total
A Agriculture, forestry, fishing	22	4	26
B-E Quarrying, manufacturing, electricity, water and sanitation	153	31	184
F Construction	151	2	153
G-H Wholesale and retail trade, repair of motor vehicles, transportation	247	313	560
I Accommodation and food service activities	77	80	157
J-L Finance, insurance, information, communication, real estate	34	56	90
M-S All other service activities	74	83	157
Total	758	569	1,327

Table B4. Number of employees by industry and full-time or part-time, end 18/19
(excludes sole traders)

Industry	Full-time	Part-time	Total
A Agriculture, forestry, fishing	21	5	26
B-E Quarrying, manufacturing, electricity, water and sanitation	169	15	184
F Construction	129	24	153
G-H Wholesale and retail trade, repair of motor vehicles, transportation	469	91	560
I Accommodation and food service activities	111	46	157
J-L Finance, insurance, information, communication, real estate	76	14	90
M-S All other service activities	124	33	157
Total	1,099	228	1,327

C. Staff recruitment

Table C1. Number of businesses reporting recruitment difficulties at time of survey (September/October/November 2019), by occupation (excludes sole traders)

	Difficult to recruit			Impact on business		
	Minor	Mod- erate	Severe	Minor	Mod- erate	Severe
1 Managers						
11 Chief Executives, Senior Officials and Legislators	-	-	1	-	-	1
12 Administrative and Commercial Managers	-	1	-	-	-	1
13 Production and Specialized Services Managers	-	1	2	-	2	1
14 Hospitality, Retail and Other Services Managers	-	1	3	-	1	3
2 Professionals						
21 Science and Engineering Professionals	-	-	1	-	-	1
24 Business and Administration Professionals	-	-	2	-	-	2
25 Information and Communications Technology Professionals	-	-	1	-	-	1
26 Legal, Social and Cultural Professionals	-	1	5	-	2	4
3 Technicians and Associate Professionals						
31 Science and Engineering Associate Professionals	-	-	1	-	-	1
34 Legal, Social, Cultural and Related Associate Professionals	-	1	4	-	1	4
35 Information and Communications Technicians	1	3	1	1	1	3
4 Clerical Support Workers						
41 General and Keyboard Clerks	-	-	1	-	1	-
42 Customer Services Clerks	-	1	-	-	1	-
5 Services and Sales Workers						
51 Personal Services Workers	-	2	5	-	2	5
52 Sales Workers	-	4	-	-	3	1
53 Personal Care Workers	-	1	1	-	-	2
54 Protective Services Workers	-	1	-	-	-	1
6 Skilled Agricultural, Forestry and Fishery Workers						
61 Market-oriented Skilled Agricultural Workers	-	1	1	-	1	1
7 Craft and Related Trade Workers						
71 Building and Related Trades Workers (excluding Electricians)	-	1	8	-	2	7
72 Metal, Machinery and Related Trades Workers	-	1	2	-	1	2
74 Electrical and Electronics Trades Workers	-	-	1	-	-	1
75 Food Processing, Woodworking, Garment and Other Craft and Related Trades Workers	-	1	3	-	3	1
8 Plant and Machine Operators and Assemblers						
83 Drivers and Mobile Plant Operators	-	1	1	-	1	1
9 Elementary Occupations						
91 Cleaners and Helpers	-	2	-	-	1	1
92 Agricultural, Forestry and Fishery Labourers	-	1	1	1	-	1
93 Labourers in Mining, Construction, Manufacturing and Transport	-	-	1	-	-	1
94 Food Preparation Assistants	-	2	-	-	2	-

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

D. The Business Environment

Table D1. Number of businesses planning to increase or decrease workforce by end March 19/20 by industrial grouping (excludes sole traders)

Industry	Increasing	Staying same	Decreasing	Total
A Agriculture, forestry, fishing	1	7	0	8
B-E Quarrying, manufacturing, electricity, water and sanitation	2	11	1	14
F Construction	2	15	5	22
G-H Wholesale and retail trade, repair of motor vehicles, transportation	4	33	2	39
I Accommodation and food service activities	7	14	6	27
J-L Finance, insurance, information, communication, real estate	0	6	3	9
M-S All other service activities	3	13	7	23
Total	19	99	24	142

Table D2. Number of businesses reporting increases or decreases in costs by industrial grouping at time of survey

Industry	Incr-easing dram-atically	Incr-easing	Stay-ing same	Decr-easing	Decr-easing dram-atically	Not stated	Total
A Agriculture, forestry, fishing	2	5	0	0	0	1	8
B-E Quarrying, manufacturing, electricity, water and sanitation	0	11	3	0	0	0	14
F Construction	4	9	2	2	2	3	22
G-H Wholesale and retail trade, repair of motor vehicles, transportation	11	16	6	1	0	5	39
I Accommodation and food service activities	9	11	1	1	2	3	27
J-L Finance, insurance, information, communication, real estate	1	7	0	1	0	0	9
M-S All other service activities	2	19	1	1	0	0	23
Total businesses with employees	29	78	13	6	4	12	142
Sole traders	2	20	11	1	0	1	35

Table D3. Number of businesses reporting opportunities for growth by industrial grouping at time of survey

Industry	Oppor- tunities for growth	No oppor- tunities for growth	Not stated	Total
A Agriculture, forestry, fishing	5	2	1	8
B-E Quarrying, manufacturing, electricity, water and sanitation	9	5	0	14
F Construction	4	15	3	22
G-H Wholesale and retail trade, repair of motor vehicles, transportation	18	17	4	39
I Accommodation and food service activities	10	14	3	27
J-L Finance, insurance, information, communication, real estate	6	3	0	9
M-S All other service activities	14	9	0	23
Total	66	65	11	142
Sole traders	14	20	1	35

Table D4. Number of businesses reporting plans for expansion by industrial grouping at time of survey

Industry	Expanding	Not expanding	Not stated	Total
A Agriculture, forestry, fishing	1	6	1	8
B-E Quarrying, manufacturing, electricity, water and sanitation	5	9	0	14
F Construction	0	19	3	22
G-H Wholesale and retail trade, repair of motor vehicles, transportation	10	24	5	39
I Accommodation and food service activities	2	22	3	27
J-L Finance, insurance, information, communication, real estate	4	5	0	9
M-S All other service activities	5	17	1	23
Total	27	102	13	142
Sole traders	4	29	2	35

Table D5. The main constraints or barriers to developing this business (number and percent of businesses reporting at time of survey)

Constraint	Businesses	Percent
Costs		
High cost of utilities	36	25%
General high costs	34	24%
Cost of freight	29	20%
Telecommunications	15	11%
Customs duty	12	8%
High cost of fuel	6	4%
High cost of wages	6	4%
Government fees	4	3%
Minimum wage too high	4	3%
Bank charges/rates	2	1%
High cost of insurance or service tax	2	1%
Market Conditions		
Low demand for products or services	41	29%
Low tourist numbers	17	12%
Competition	10	7%
Seasonal fluctuation of demand	6	4%
Unfair competition from government entities	3	2%
Finance and Banking		
Lack of subsidy	10	7%
Availability of finance and lack of investment	9	6%
Lack of international banking	3	2%
Staffing		
Staff recruitment and retention	11	8%
Lack of skills taught (e.g. language, construction)	2	1%
Government		
Excessive bureaucracy	8	6%
SHG procurement constraints	3	2%
Barriers from regulation or implementation	2	1%
Poor infrastructure	2	1%
Land and Supplies		
Availability of land or premises	10	7%
Materials (fresh food, construction) not available reliably	7	5%
Water shortages and restrictions	5	4%
Postal service limitations	3	2%
Land management and tenure issues	2	1%