

Central Coast Council

Business Retention and Expansion Survey Insights Report

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Central
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Council





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Executive Summary

Business Retention and Expansion (BRE) is a program designed to support and strengthen the local businesses that are invested in the local community through survey interactions to gain local “business intelligence,” that is shared with industry and stakeholders and translated into sharing information on services or programs that support local business growth.

The first Central Coast BRE survey was conducted in September 2025. The online survey consisted of questions across several areas that aimed to get an understanding of the sentiment and conditions affecting businesses on the Central Coast. All data secured is anonymous and there was an opt-in/opt-out position to answering these questions.

The BRE Insights report will be available on Council’s website and sent to all respondents. All respondents will be provided with a suite of information on support programs and services available for local businesses on the Central Coast.

The regional advantages and disadvantages identified in the report from business will be presented to the Central Coast Regional Economy Taskforce, who include representatives from relevant government agencies.

The insights from the report will also be used to inform the research for the new economic development strategy and business concierge service.

High-level Survey Insights

The following information from the survey provides insights on types and sizes of business who responded, as well as the regional advantages and disadvantages of doing business on the Central Coast:

Business Information:

- The majority of business who completed the survey were small businesses with 5 or less employees.
- The majority of businesses were satisfied with their location.
- Time series data showed businesses have been consistently growing their employee numbers.
- 54% of businesses had a succession plan, 65% had an up-to-date business plan. 54% had an up-to-date marketing plan.

Regional Advantages and Disadvantages:

- 82% of businesses viewed the quality of life on the Central Coast as an advantage.
- 55% of businesses noted access to skilled labour as a key disadvantage.
- Land costs and transportation availability/cost all received an at or about a 40% rating of disadvantage, with availability of zoned land at 30%.
- The local permit process, with 64% saw it as a disadvantage to doing business.
- For access to markets 41% of businesses saw this as an advantage to doing business.
- 54% of businesses responded saying local government was a disadvantage.

Verbatim feedback on what could be improved:

- finding commercial spaces and skilled labour
- improving transport and parking needs
- better business support from Council
- need for improved Council approval processes, and
- the need for improved streetscapes and built environment.

Further information:

- one third of all businesses said they would like to receive the BRE Insights report and further information on grant opportunities, resources and business support programs available to them.

The insights from the survey will be used to inform the research for the new economic development strategy and business concierge service.

Central Coast Council Business Retention & Expansion Survey

In economic development, Business Retention and Expansion (BRE) is a program designed to support and strengthen the local businesses that are invested in the local community.

Through survey interactions the program seeks to gain insight into business practices, planned future actions, as well as the challenges faced. Then this “business intelligence” is shared with industry and stakeholders and translated into sharing information on services or programs that support local business growth.

Central Coast Council’s Economic Development team undertook the first BRE Survey for the Central Coast in September 2024. Key messaging was:

- *This online survey will be an annual survey going forward, which will provide a check-in opportunity for benchmarking and to ensure current needs are met.*
- *Once a network is developed, Council can provide direct information & resources available to local business that will support their business retention and expansion.*
- *Results will also direct Council advocacy efforts to other levels of government for the benefit of Central Coast businesses as patterns and trends are identified.*
- *The survey results will be shared so Central Coast business owners can understand patterns or trends within the industry.*

The 15-minute survey consisted of sixty-three questions across a number of sections that covered the topics:

- Type and sizes of businesses
- Location advantages and disadvantages
- Market types - national and international
- Workforce and training
- Financials, and
- Future Plans

Communications to survey respondents advised that all data secured would be anonymous and only presented in an aggregated way, and that there was an opt-in/opt-out position to answering any and all questions.

The survey was emailed to all businesses registered on the Central Coast and communicated via a range of mainstream and social marketing channels.

There were 227 total surveys submitted. Of the 227 submissions, 102 submissions were completed, having provided answers to the final questions, with 125 submissions being partially completed (those that exercised the opt-out option).

Notwithstanding the opt-out question numbers, the vast majority of the questions had a response rate of at least 100+ businesses – so although the lesser numbers creates a bias compared to total respondents, as this was an information gathering exercise 100+ businesses is a reasonable sample size.

All respondents will be provided with a suite of information on business support programs and services available to local businesses.

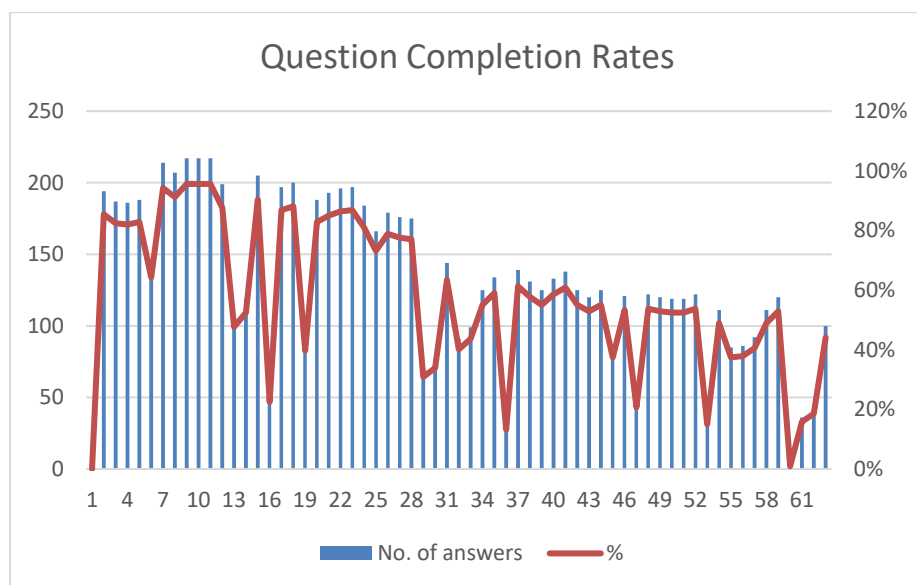


Figure 1 BRE Question Completion Rates

The data indicates that early questions with higher response rates were for business and market advantages and disadvantages questions. The latter questions were in the categories of workforce, financial information, regulatory considerations and future plans.

Given the length of the survey and responses, data analysis has been conducted on notable insights identified across each of the topic areas.

Survey Insights Analysis

Primary Business Type

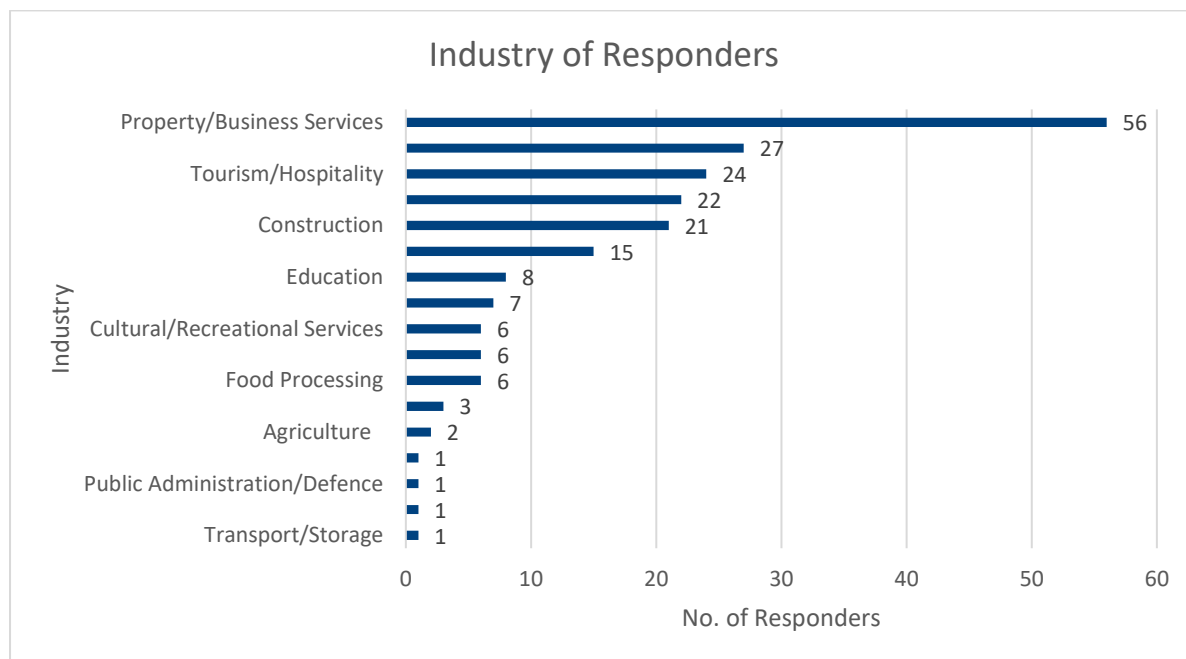


Figure 2 Industry of Responders

With the most responses, fifty-six (56) businesses, came from the Property/Business Services sector. There were also a similar level number (20-30) of businesses that covered the sectors of; Tourism/Hospitality, Retail, Manufacturing and Construction.

Years of Operation

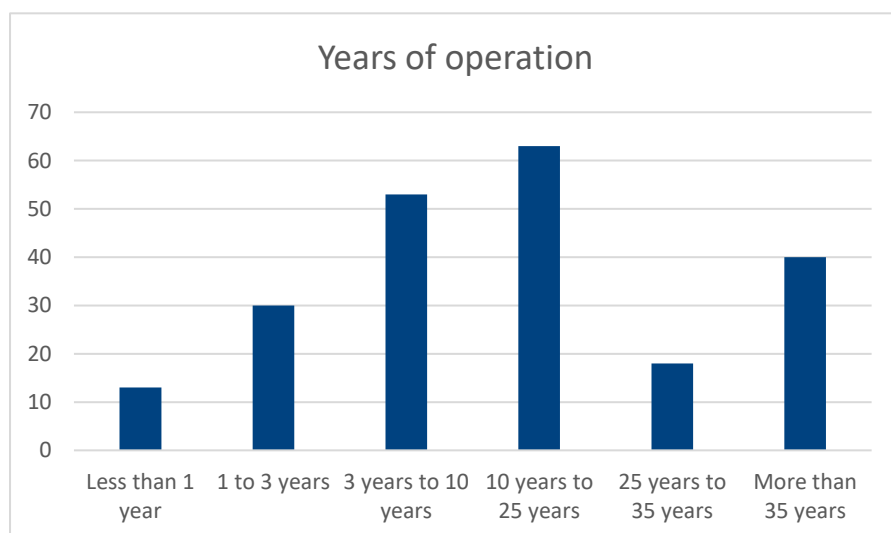


Figure 3 Years of Operation

The majority of businesses stated that they had been at their current premise for 10 to 25 years. The results of years of tenancy at the current location were reflective of the years of operation, with a slight skew to spending less time at their tenancies.

Tenancy – Lease or Owned

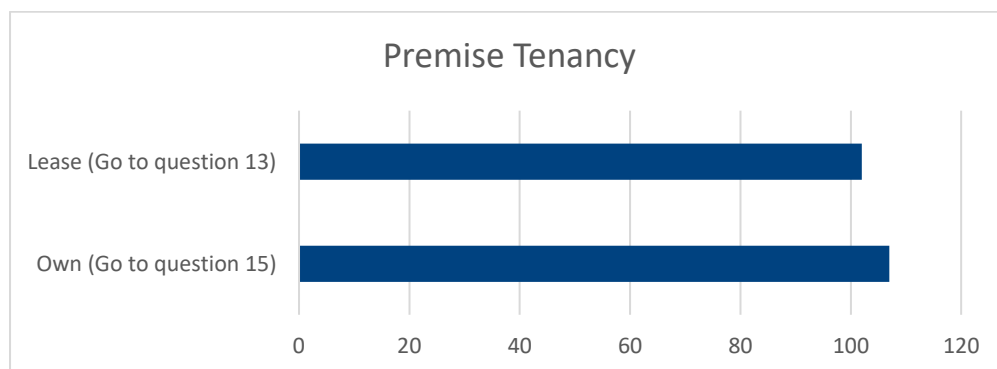


Figure 4 Premise Tenancy

There were slightly more businesses that owned their premises to those that leased. For those who own their premises, 70% of responders noted the same timeframe of tenancy as their timeframe of operation.

For those that leased a premise, only 64% of responders had the same timeframe at their current premise as to their operating timeframes. This result shows that those who own their facility appear to be slightly more likely to stay at their location than those who are leasing a facility.

80% of the businesses said their location was the only location for the business and 85% only one location.

Location Satisfaction

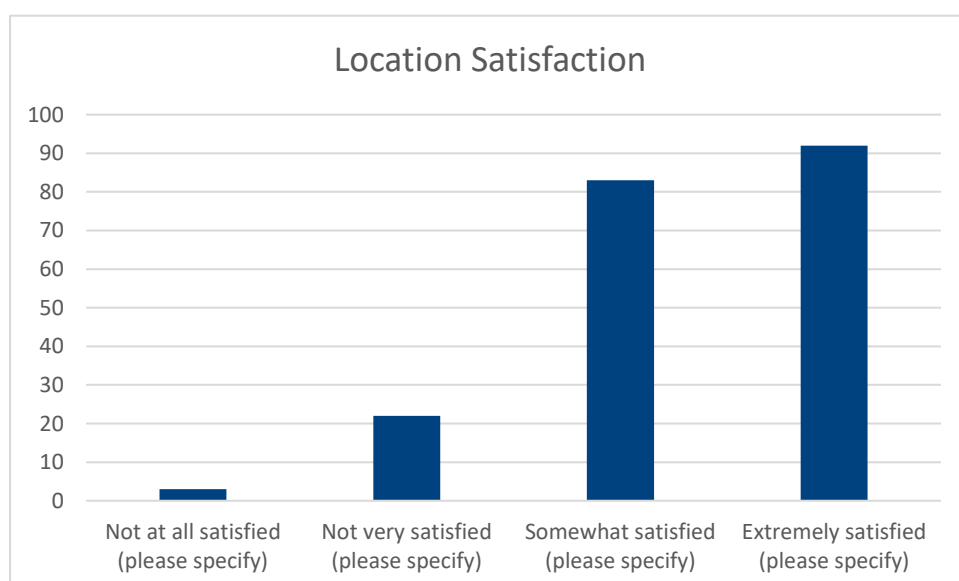


Figure 5 Location Satisfaction

The majority of businesses were extremely satisfied, or somewhat satisfied with their location. When asked for the reasons for selecting their satisfaction rating, those who picked extremely satisfied or satisfied noted it was a central location for their business, and also due to a work-from-home situation. Rents, parking, transport, were reasons given for not being totally satisfied.

Employee Numbers

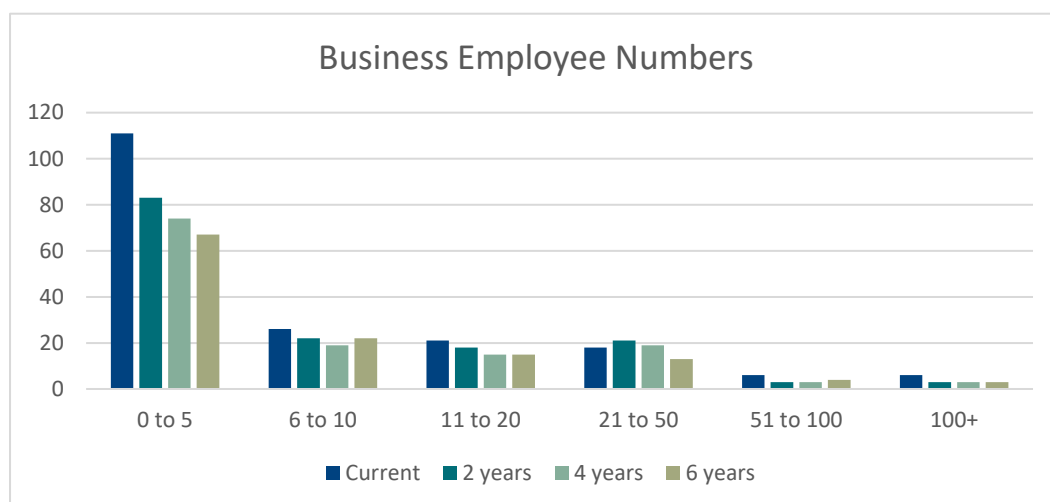


Figure 6 Business employment numbers

This question was broken down into the number of current employees, the number of employees 2 years ago, the number of employees 4 years ago and the number of employees 6 years ago. To aggregate the results into meaningful levels, the numbers were grouped into 0-5 employees, 6-10 employees, 11-20 employees, 21-50 employees, 51-100 employees and 100+ employees.

The results of the number of employees, confirmed other data sets that there are a large number of small businesses operating on the Central Coast. The good news is the time series results suggest that over time businesses have been steadily growing their employee rates, with only a slight dip in the number of businesses employing 21 to 50 people. This may be accounted for by the growth of businesses employing more than fifty people.

Business Planning and Readiness

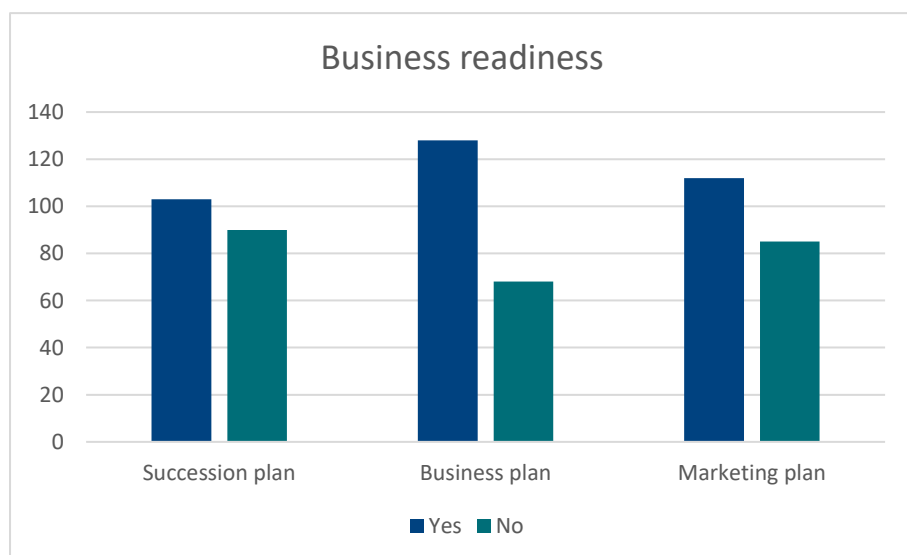


Figure 7 Business readiness

Of 193 businesses, 54% has succession plan. Of 196 businesses, 65% had an up-to-date business plan. Of 197 businesses, 57% had an up-to-date marketing plan.

Comparative Advantages

There were a wide number of ranking questions on advantages and disadvantages of doing business on the Central Coast. The following charts provide data insights break those down into smaller, easier to view, charts to aid direct understanding.

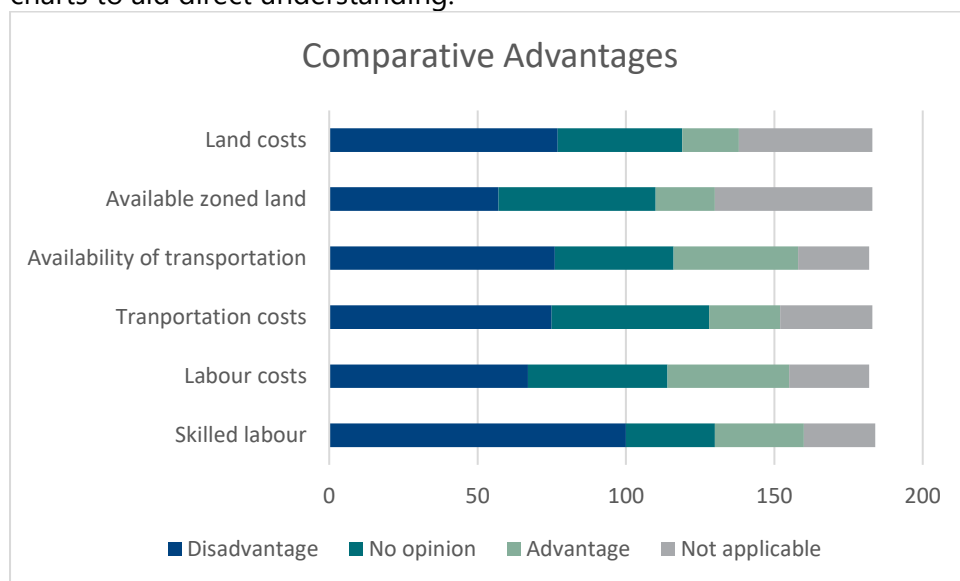


Figure 8 Q24. Comparative advantages

Businesses were asked to rate the comparative advantage across six areas of:

- Land costs
- Available zoned land
- Availability of transport
- Transportation costs
- Labour costs

There is a stand-out comparative disadvantage on the Central Coast for access to skilled labour, with over 55% noting this as a disadvantage. Land costs and transportation availability/cost all received at or about a 40% rating of disadvantage, with zoned land at 30%. So, all of the rated areas showed a sizeable level of disadvantage on the Coast.

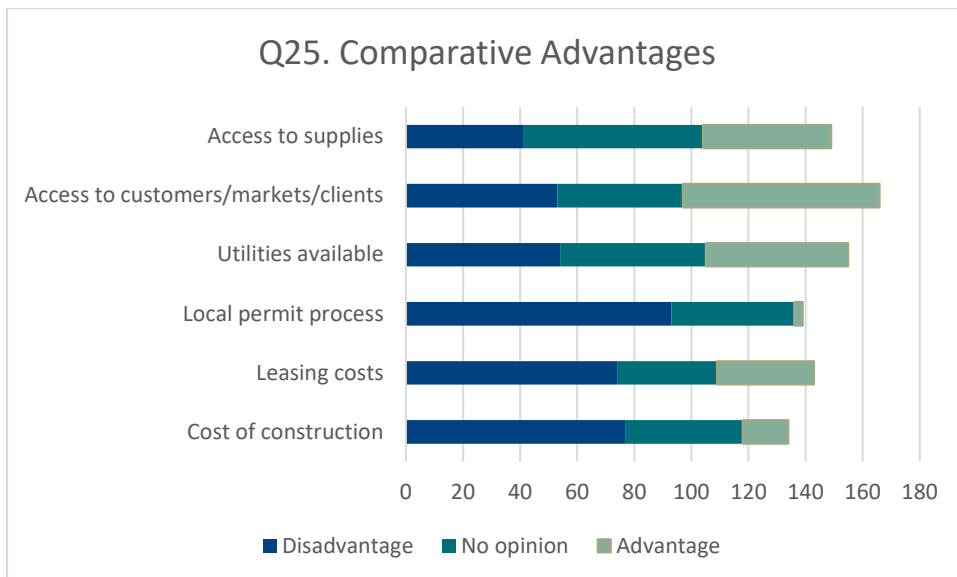


Figure 9 Q25. Comparative Advantages

Businesses were to rate the comparative advantage across six areas of:

- Cost of construction
- Leasing costs
- Local permit processes
- Utilities available
- Access to customers/markets/clients
- Access to supplies

The standout here was about the local permit process, with 64% noting it as disadvantage on the Central Coast, 2% saw it as an advantage and 34% had no opinion. The cost of construction and leasing costs were also perceived to be a disadvantage to doing business on the Central Coast.

Access to customer/markets/clients had the highest response rate and positive response, with 41% of responders noting this as an advantage to doing business on the Central Coast.

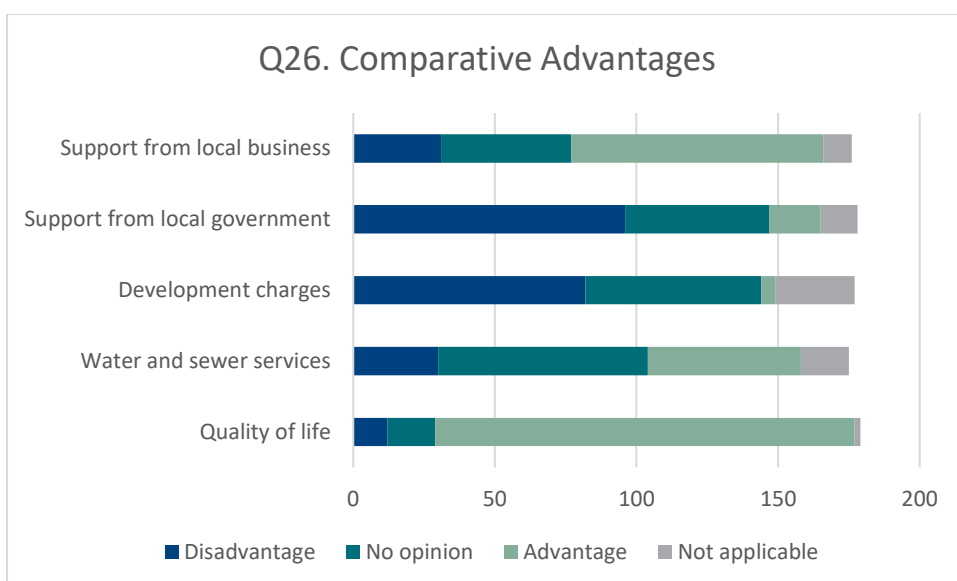


Figure 10 Q26. Comparative Advantages

Businesses were to rate the comparative advantage across five areas:

- Quality of Life
- Water and Sewer Services
- Development Charges
- Support from Local Government
- Support from Local Business

Businesses overwhelmingly, 82%, viewed the quality of life on the Central Coast as an advantage. Fifty-one percent said support from other local businesses was also an advantage to doing business in the region. 54% responded support from saying local government was a disadvantage of doing business on the Central Coast. There were also negative perceptions of the development charges with 46% stating this was a disadvantage.

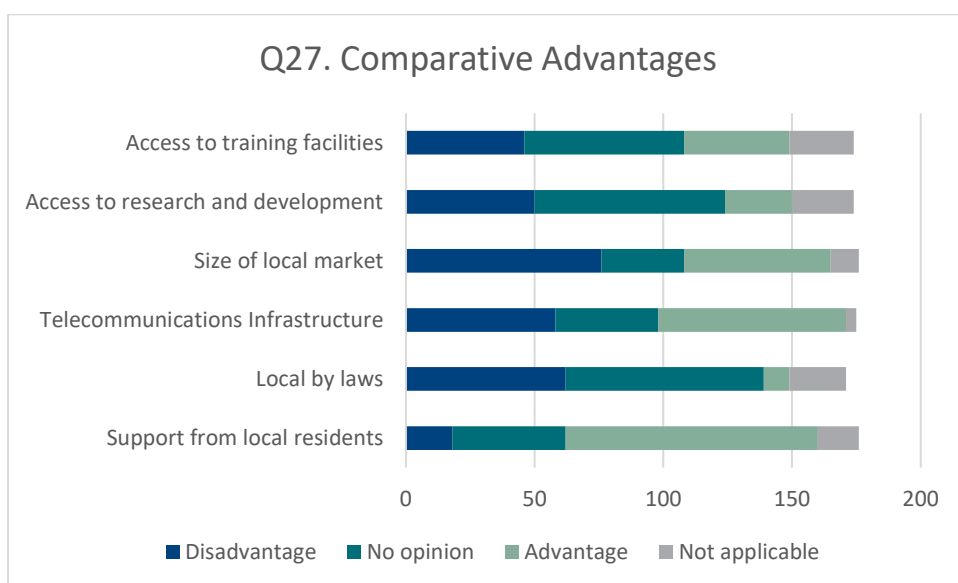


Figure 11 Q27. Comparative Advantages

Businesses were to rate the comparative advantage across five areas:

- Support from local residents
- Local by laws
- Telecommunications Infrastructure
- Size of local market
- Access to research and development
- Access to training facilities

The support from local residents was seen to be an advantage to doing business on the Central Coast with 56% of businesses selecting it to be an advantage, compared to only 10% who saw it as a disadvantage. The response to local by-laws was a mixed response, with most businesses seeing it as a disadvantage or did not hold an opinion. The size of the local market was also seen to be at more of a disadvantage, with 43% noting it to be a disadvantage, compared to only 32% who stated it as an advantage.

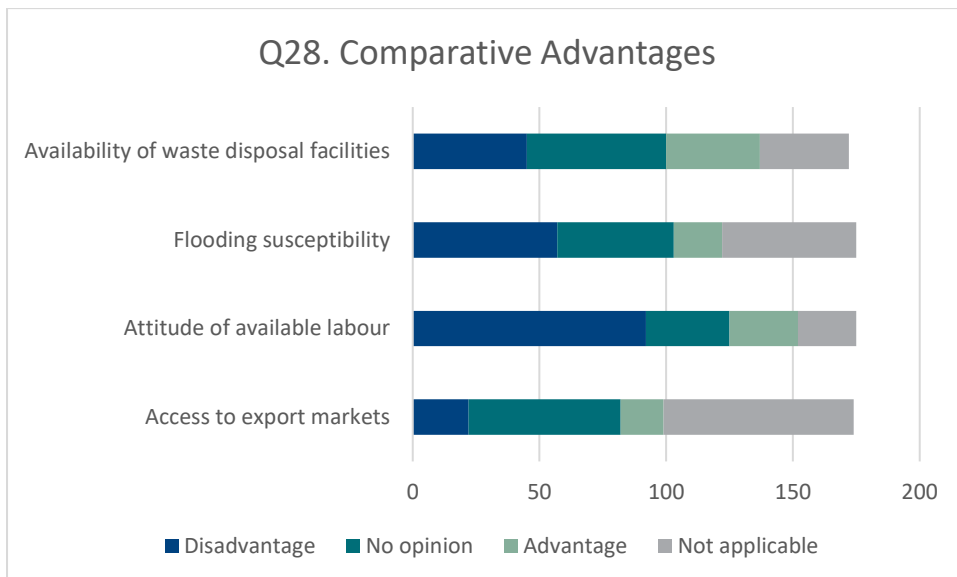


Figure 12 Q28. Comparative Advantages

The final comparative advantage question was in the areas of:

- Access to export markets
- Attitude of available labour
- Flooding susceptibility
- Availability of waste disposal facilities

The attitude of available labour was seen as a disadvantage, for 52%, of businesses. Few businesses responded on having access to export markets as an advantage, the vast majority of responses were not applicable or they held no opinions on the matter (showing the survey sample only picked up a small number of exporting businesses).

At the conclusion of the Comparative Advantages rating section there was a general comments area, twenty-two (22) comments were received, under the following themes:

- Lack of government support
- Challenges with Council Development approvals processes
- Desires for streetscape improvements, and
- Industrial recycling needs.

Other Insights Uncovered

There was a question on the impact of technology and twenty-five businesses (11%) noted AI as likely to have an impact on their business in the future.

The last two survey questions were open-ended and asked for commentary on:

- Q61 - *What new business(es) or services would you like to see added to this community?*
- Q62 - *What other comments or concerns about the local business environment would you like to raise?*

Responses were very wide and varied. Some common themes from the comments supplied from these question included:

- finding commercial spaces and skilled labour
- improving transport and parking needs
- better business support from Council
- need for improved Council approval processes, and
- the need for improved streetscapes and built environment.

Survey Conclusion

The survey insights report will be made available on Council's website and sent to all respondents. A direct action from the survey is to provide information on grant opportunities, resources and support programs for local businesses.