

Business Retention & Expansion (BRE) Survey Analysis Report

April 2026

227 survey responses



Proudly funded by



Project delivery partners



Acknowledgement of Country

Business NSW acknowledges the Traditional Custodians of the land on which we work and live and pay our respects to Elders past, present and emerging.

We recognise the continuing connection of Aboriginal people to land, waters and culture and we thank them for sharing their knowledge with us so that our relationship with this land can be enriched.

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Table of Contents

Introduction

Executive Summary

- 1. Business profile**
- 2. Market Growth and Development**
 - 2.1 Market Understanding**
 - 2.2 Role of Technology in Business**
 - 2.3 Supply Chain and Localising Opportunity**
- 3. Employment and Workforce Development**
 - 3.1 Current Workforce**
 - 3.2 Workforce Development**
- 4. Business Plans and Decisions**
 - 4.1 Business Planning**
 - 4.3 CSR & ESG**
- 5. Local and Regional Business Environment**
 - 5.1 Business Environment**
 - 5.2 Services and Infrastructure**
- 6. Business Support Services**
 - 6.1 Business Management Skills and Development**



Introduction

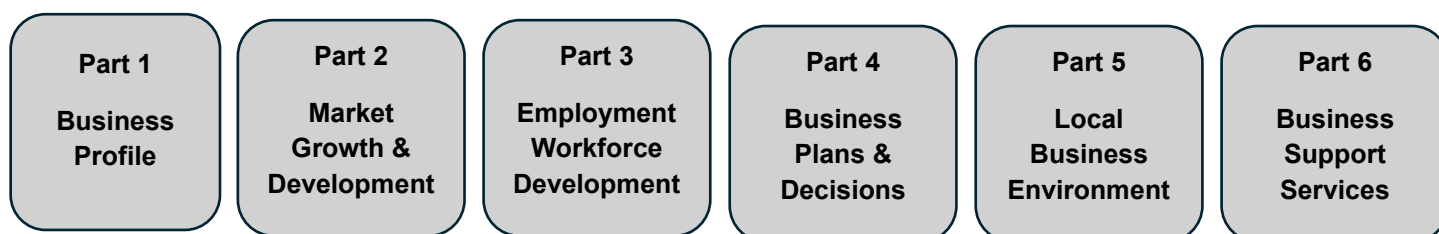
The Business Retention and Expansion Survey is a region-wide business survey conducted in 2025 to better understand the challenges, opportunities and priorities facing local businesses across the Northern Rivers and Tenterfield Shire. The survey was designed to capture practical, on-the-ground perspectives across a wide range of industries, business sizes and locations and to provide an evidence base to inform ProspER Northern Rivers, Regional Economic and Environment Plan to 2040.

The survey was promoted through multiple channels to maximise reach and participation and ensure responses reflected diverse business experiences across sectors and the seven Northern Rivers LGAs plus Tenterfield who all are included in the ProspER Plan. These channels included:

- ProspER website page promotion
- ProspER project updates (email, face to face, virtual meetings)
- EDMs and direct emails to businesses
- Social media promotion (LinkedIn and Facebook), both paid and organic
- Paid & earned media (newspaper and magazine)
- Promotion at ProspER and Business NSW events
- Stakeholders were also asked to share the survey through their own networks, including local Councils, Business Chambers, Government Agencies and regional partners.

Importantly, this survey is not intended to be a standalone exercise. The data provides a snapshot in time and will be used alongside insights gained from the face-to-face engagement with businesses throughout the year. Conversations, workshops and direct engagement will help validate the findings, add local context and deepen understanding of issues identified in the data. Together, the survey results and business and industry engagement will support more targeted, practical and place-based recommendations within ProspER Northern Rivers.

The survey has been set up in six sections:



Executive Summary

The survey data paints a clear picture of a business community that is resilient, adaptable and strongly committed to its region, but operating under growing structural pressure. Across sectors and LGAs, businesses consistently reported challenges in attracting and retaining staff, particularly for skilled, trade-qualified, mid-level and experienced roles. These workforce challenges are not driven by a lack of intent from businesses, but by broader constraints such as housing affordability, limited transport options, skills shortages and competition from higher-paying markets.

Infrastructure emerged as one of the most significant limiting factors for growth. Issues such as poor road conditions, limited public transport, unreliable digital connectivity, shortages of flood-free industrial and commercial land, and ongoing flood risk were repeatedly raised. These constraints directly affect business costs, productivity, expansion plans and workforce attraction, particularly in flood-affected LGAs and regional or hinterland locations.

The data also shows that many businesses are already taking practical action on environmental and social responsibility. Common initiatives include energy efficiency, solar and battery installation, waste reduction, ethical and local sourcing, disaster preparedness, flexible work practices and staff wellbeing. However, while values and intent around ESG and community contribution are strong, businesses often lack the structural support needed to scale these efforts — particularly when workforce shortages and infrastructure gaps persist.

Overall, the survey highlights that skills, workforce, ESG and infrastructure issues are deeply interconnected. Businesses are doing what they can within their own operations, but long-term improvement will require coordinated, place-based solutions that address housing, transport, training pipelines, digital connectivity and flood resilience. These findings provide a strong foundation for targeted action and will continue to be shaped and refined through ongoing engagement with businesses across the region.



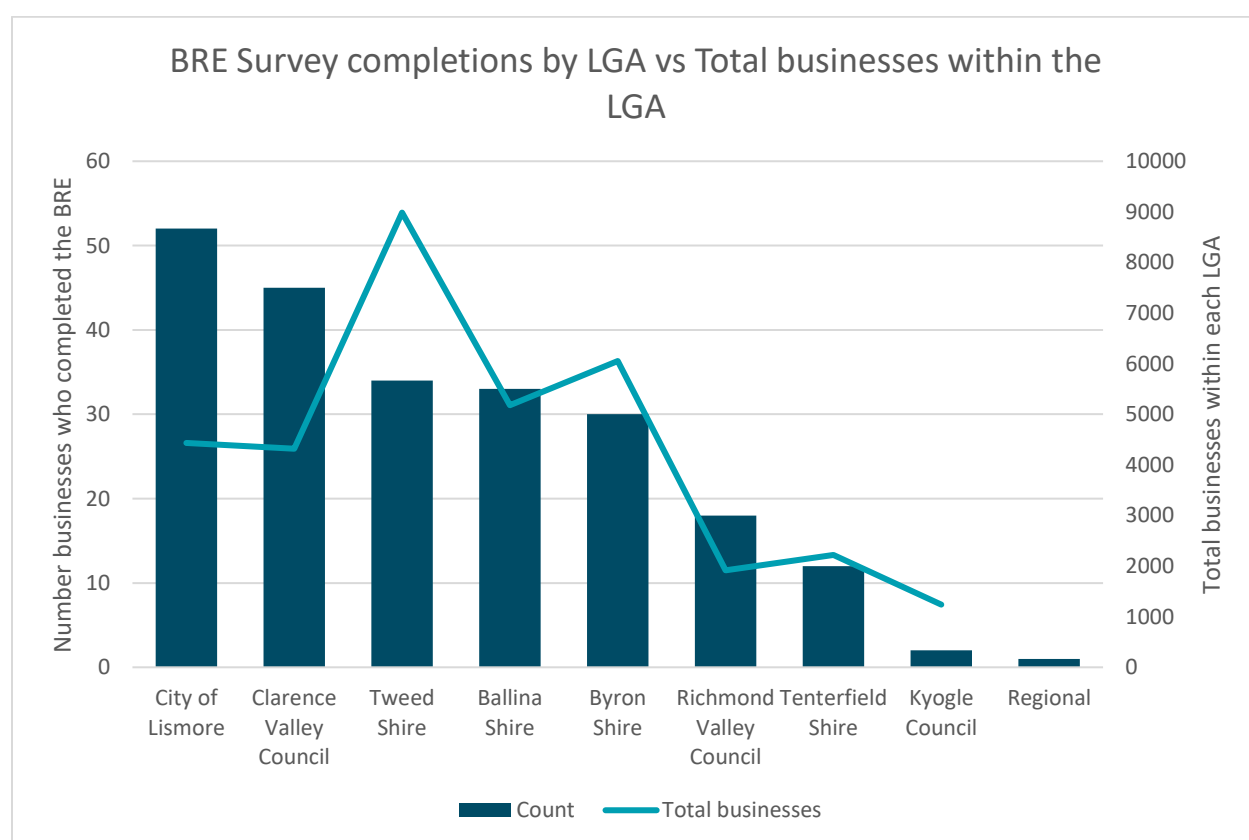
1. Business profile

Business Location - LGA

The breakdown of respondents by Local Government Area (LGA) is seen in the graph below. Despite a big effort being made to promote and encourage uptake of the survey across all LGAs, there was a vast difference in numbers gained.

In the LGAs with the lowest numbers, Kyogle and Tenterfield, we held a specific business engagement event within each to ensure we gathered a strong understanding of the current business environment within those LGAs.

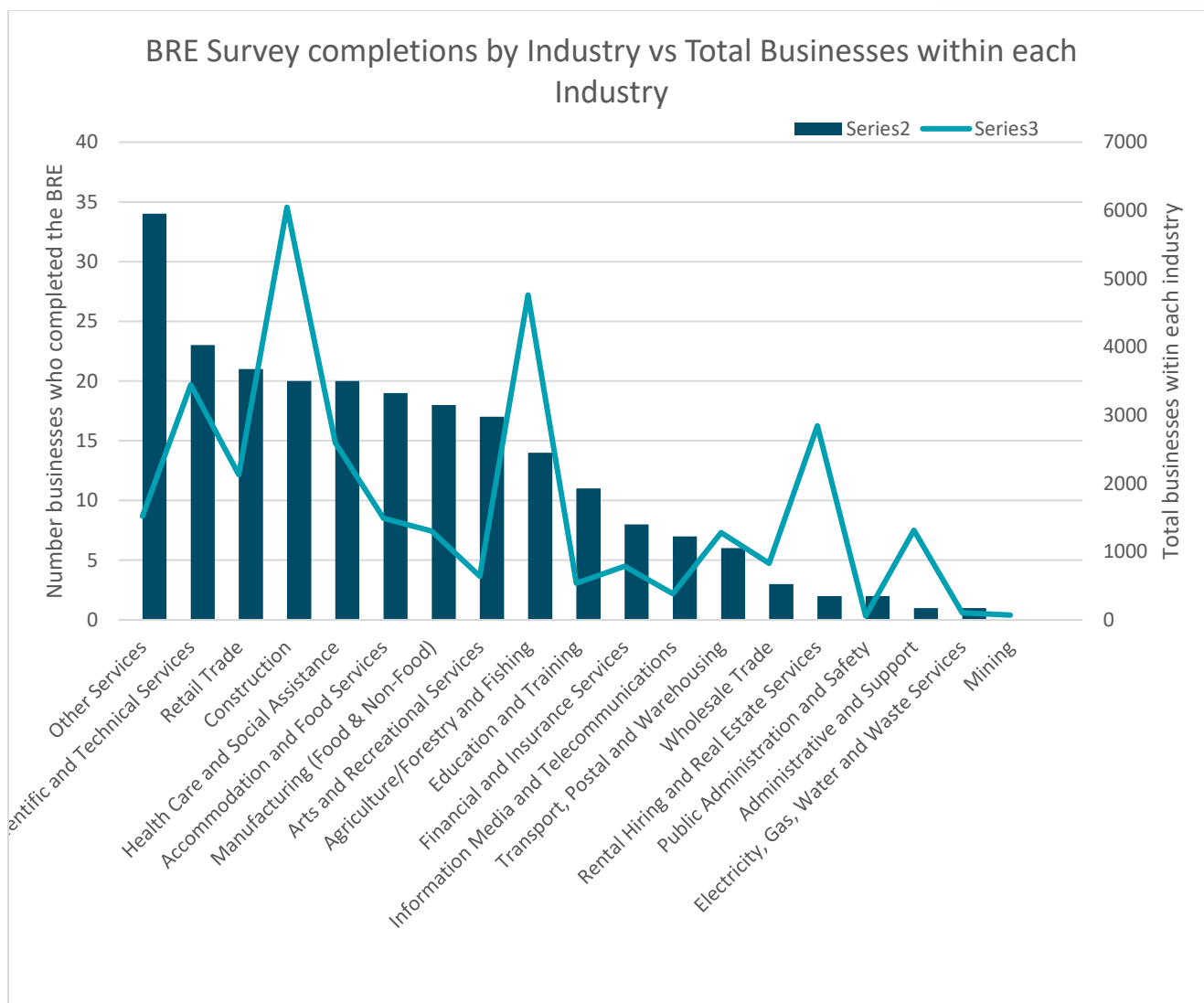
There were 227 respondents to the BRE Survey, which is a sample of the total 36,000 businesses across the Northern Rivers and Tenterfield Shire. The graph below represents the number of BRE completions in the bars with the total business numbers shown by the line.



Source: LGA automated from business suburb

Business Sector



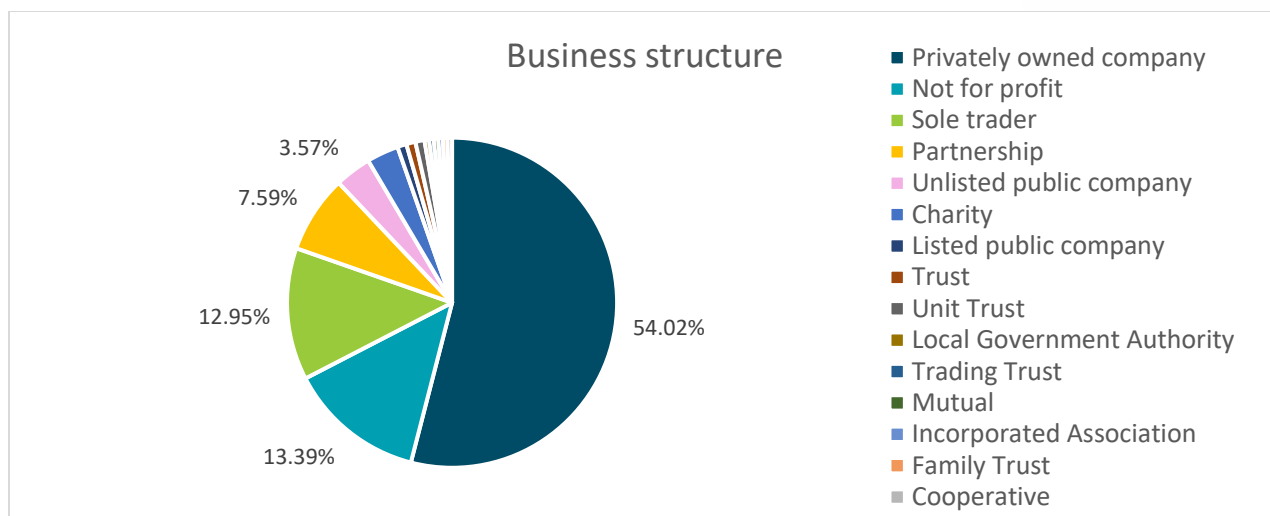


Survey question: *What industry sector is your business operating in (primary sector)?*

Business Structure

Majority of businesses within our region are privately owned and this is reflected within our BRE Survey responses. Below shows the breakdown of business structures of respondents.

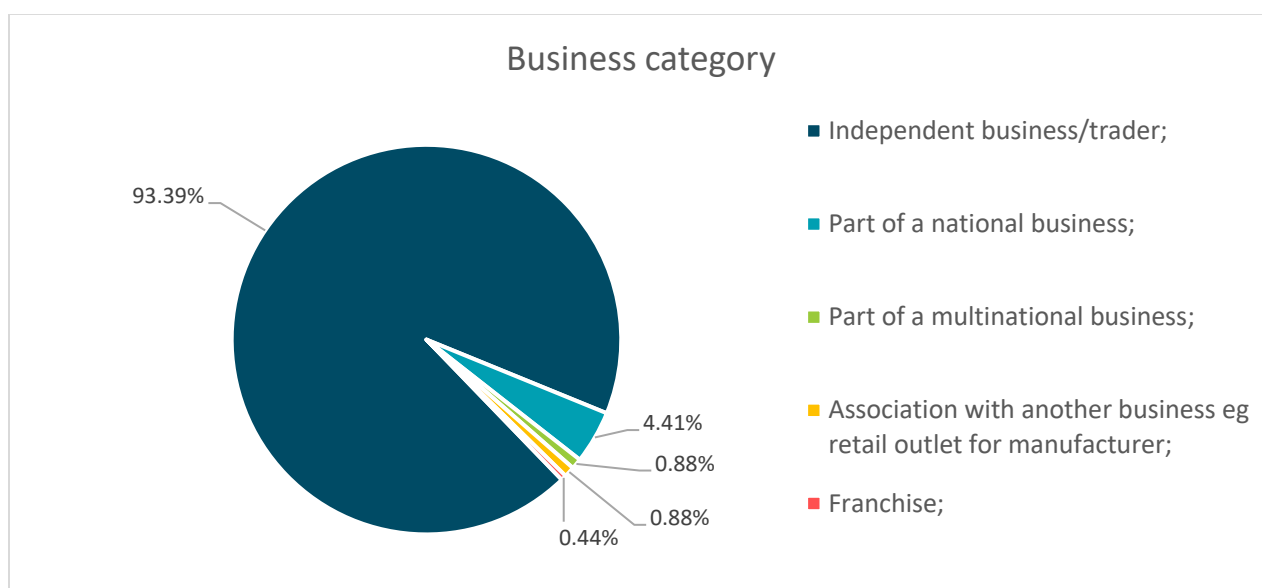




Survey question: *What is the structure of your business?*

Business Category

Most respondents (93%) are independent businesses/traders.



Survey question: *What is the category of your business?*

Business Establishment

Two thirds of business respondents were founded by the current owner with another 14% purchased. The remaining business respondents were either inherited, founded by community, family, through a government grant or other methods.



How business was originally established	Count	Percentage
Founded by the current owner(s)	150	66%
Purchased from a previous owner	31	14%
Inherited from a previous owner	11	5%
Unsure/don't know	4	2%
Other methods (varied responses)	31	13%

Survey question: How was the business originally established?

Businesses who responded to this survey varied in the number of years they had been in business. We've grouped businesses by the number of years since they were established below:

Number of years the businesses has been running	Count	Percentage
0 - 15 years	115	50.7%
16 - 30 years	51	22.5%
31 - 50 years	42	18.5%
51 – 100 years	14	6.2%
101 - 150 years	4	1.8%
151 - 200 years	1	0.4%

Survey question: What year was the business established?

Business Leadership

We asked businesses if they were majority-owned or led by people from particular groups. Respondents were able to choose multiple options if they had multiple groups as either owners or leaders. Of all business respondents:

- 77 are owned or led by Women
- 11 are owned or led by Aboriginal or Torres Strait Islander
- 8 are owned or led by someone with Culturally and Linguistically Diverse background
- 5 are owned or led by someone with a disability

Of the remaining businesses:

- 134 selected None of the above, and
- 9 selected We don't know or don't wish to share.

Survey question: Is your business majority-owned or led by individuals from any of the following groups?

Relocation

Only one quarter of respondents' businesses have relocated. Of these:

- 21 businesses (9%) relocating within the same LGA
- 5 within the Northern Rivers or Tenterfield Shire region
- 14 elsewhere in NSW
- 20 relocating from elsewhere in Australia, and
- 1 relocated from overseas.



Survey question: *If the business has been relocated, where did it move from?*

The most common reason for moving within the LGA or the Northern Rivers and Tenterfield region were lower costs, with the second most common reason being moving out of a flood zone or for lifestyle/personal reasons.

Of business respondents who had moved their business from another location within NSW or Australia, 74% did so due to Lifestyle/Personal Reasons.

Survey question: *If relocated, what was the primary reason for relocating?*

Products and Services Offered

Businesses within this region offer a varied range of products and services.

Products Offered in this Region

The survey shows the region produces a diverse and increasingly value-added range of products, many of which serve markets well beyond the local area.

Food, Agriculture & Natural Products

- Fresh agricultural produce, livestock, dairy and honey
- Specialty foods (artisan, gourmet, organic and functional foods)
- Processed and manufactured food products, including dried goods and ingredients
- Beekeeping and value-added honey products
- Botanical, natural and plant-based products

Manufacturing & Made Goods

- Food and beverage manufacturing
- Non-food manufacturing (cleaning products, personal care, household goods)
- Fabricated and engineered components
- Timber products, joinery and cabinetry
- Structural and building materials
- Energy system installations (solar, batteries)

Creative & Retail Products

- Clothing, textiles and wearable goods
- Homewares, gifts and specialty retail products
- Artisan and creative products
- Health, wellness and lifestyle products



Services Offered in this Region

The region also has a strong and diverse knowledge and professional services economy, supporting both local needs and external markets.

Construction, Trades & Built Environment Services

- Residential and commercial construction
- Civil construction and infrastructure services
- Trade services (electrical, plumbing, solar installation, specialist trades)
- Project management, development management and design services
- Equipment hire, maintenance and technical support

Professional, Scientific & Technical Services

- Accounting, bookkeeping and financial advisory services
- Engineering, surveying and environmental services
- Planning, architecture and development consultancy
- Business advisory, marketing and digital services
- Quality assurance, compliance and regulatory services

Health, Care & Community Services

- Allied health, psychology and counselling
- Aged care and disability support services
- Community and not-for-profit services
- Wellness, fitness and preventative health services

Hospitality, Tourism & Experience Services

- Restaurants, cafés, bars and catering
- Accommodation and event venues
- Weddings, retreats and destination experiences
- Eco-tourism and nature-based experiences

Education, Training & Creative Services

- Vocational education and training
- Professional training and assessment
- Arts, film, theatre and creative production
- Cultural, educational and community programs
- Design, content creation and immersive technology services

The data shows the region offers high-quality, value-added products grounded in agriculture, manufacturing and creativity plus a broad services base spanning construction, professional services, health, education and tourism. Across all, there is strong alignment with sustainability, provenance and place-based identity and the capability to serve local, national and international markets.

Survey question: *What are the four main products or services offered by your business*

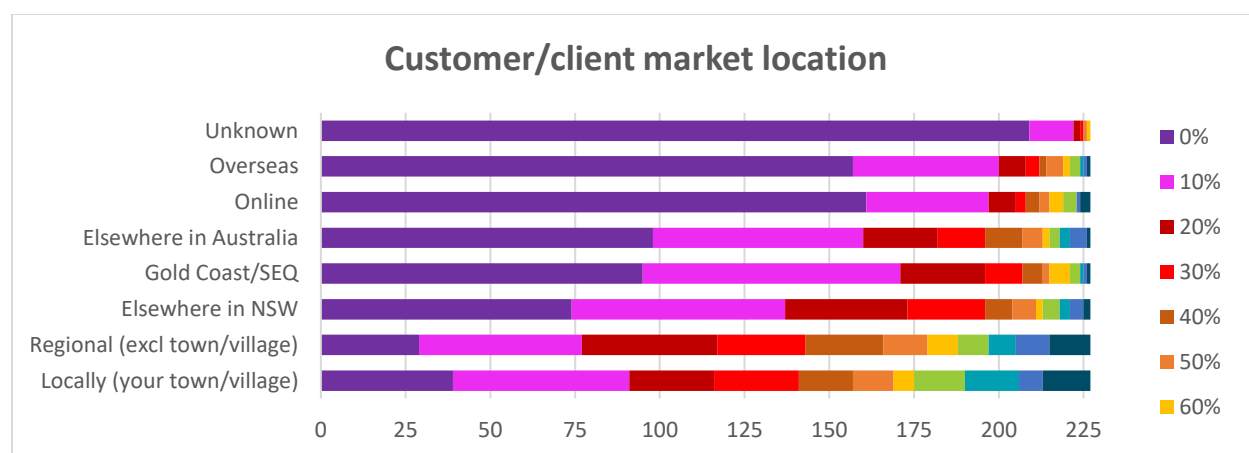


2. Market Growth and Development

2.1 Market Understanding

Current Market Location

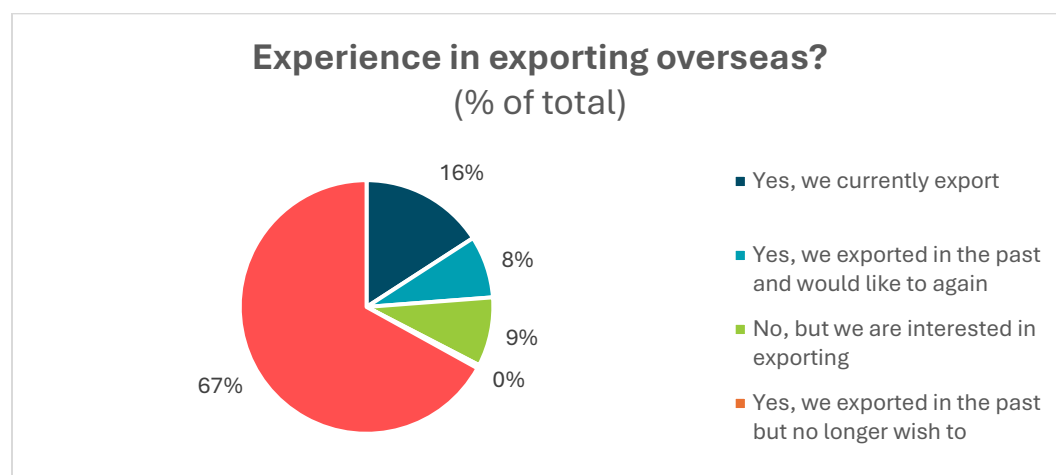
We asked businesses where their current customer/clients come from. We gave a list of locations and asked them to advise what the percentage of customers they thought came from each location. Below shows what percentage of customers come from each area with the top navy bar representing 100% and the bottom purple bar representing 0%.



Survey question: *Where is your customer/client market located?*

Current Export Activity and Interest

We asked businesses about their exporting experience and interest. The data showed that 16% currently export, with another 17% interested in exporting.



Survey question: *Have you previously engaged in exporting or had a presence overseas?*

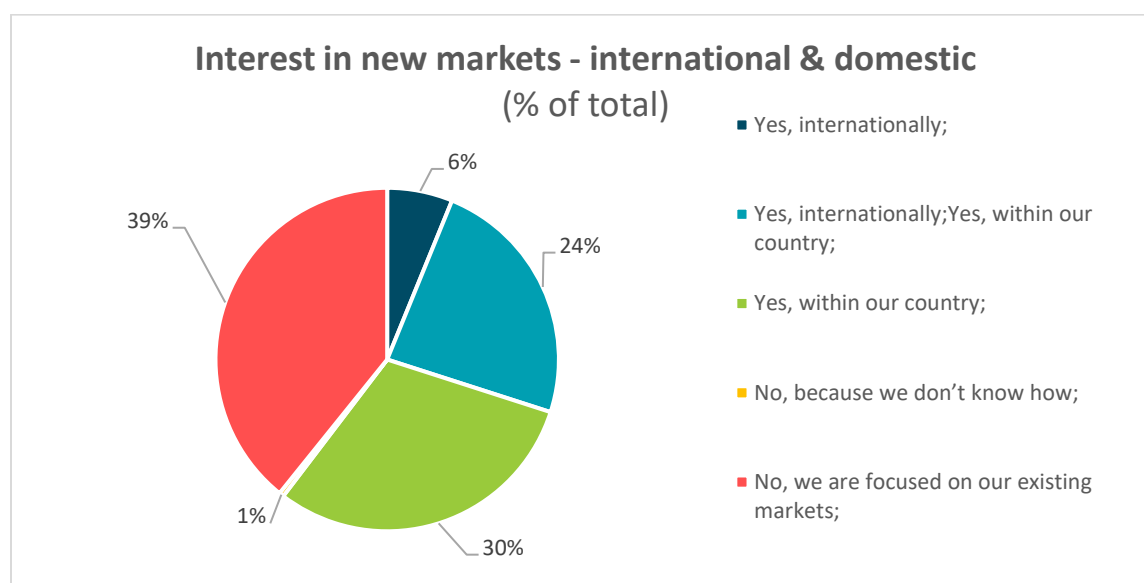


Market Expansion and Development

We then asked businesses about their interest in expanding into new markets, both internally and domestically, 60% (137 businesses) said yes they were interested in expanding into new markets. Some respondents selected both internally and domestically as seen below. In summary:

- 30% of respondents (6% + 24%) are interested in expanding into new international markets
- 54% of respondents (30% + 24%) are interested in new markets within our country

Later in the survey we asked what support would help to expand into new markets and all but 15 of these businesses selected multiple areas where they would require support.



Survey question: *Are you interested in expanding to new markets (domestic or international)?*



International Markets Breakdown and Expansion

Current International Markets

As seen above, only 16% of respondents, (36 business), currently export internationally, with North America, Europe, South East Asia and Oceania Pacific being the most common regions they are serving.

International markets CURRENTLY serving	Count
North America	22
Europe (EU)	20
South Asia (Vietnam, Thailand, Malaysia Singapore, Indonesia etc.)	19
Oceania Pacific	19
United Kingdom	16
North Asia (Japan and Korea)	15
Greater China (China, Hong Kong, Macau and Taiwan)	13
Middle East	11
South America	9
Africa	5

Survey question: *What international markets are you currently serving?*

International Markets Considering

Across all business respondents, 30% (68 businesses) are interested in expanding into new international markets. This included businesses already exporting internationally and wish to expand this. The most common markets being considered were Europe, North and South Asia, North America and the United Kingdom.

As seen with current export regions, the least common regions of interest are Africa and South America.

International markets CONSIDERING for expansion	Count
Europe (EU)	32
North Asia (Japan and Korea)	29
South Asia (Vietnam, Thailand, Malaysia Singapore, Indonesia etc.)	29
North America	28
United Kingdom	28
Oceania Pacific	21
Middle East	18
Greater China (China, Hong Kong, Macau and Taiwan)	17
South America	9
Africa	5

Survey question: *What international markets are you considering for expansion?*



The graph below compares current export markets with those being considered.



Source: Combined the two tables above showing current and considered markets

Support Required for Export Expansion

Majority of businesses were interested in some form of support to expand into new markets with priorities in building capability and connections.

Responses in detail seen below:

Support required for expansion	Count
Access to business mentoring and industry networking opportunities	66
Help with branding and marketing strategies for new markets	55
Access to export financing/grants	51
Access to venture capital or investor networks	50
Digital marketing/e-commerce assistance	48
Research on new domestic or international markets	46
Domestic distribution and retail expansion assistance	37
Trade missions or networking with foreign buyers	34
Support for product adaptation to meet new market demands	31
Training on international business strategies	25
Guidance on supply chain optimisation for scaling operations	21
Regulatory guidance for exporting	21
We don't require support	15

Survey question: What support would help you expand to new markets?



To expand on the key support required:

1. **Capability Building & Strategic Support** - Businesses are seeking hands-on guidance and trusted expertise to navigate unfamiliar markets. Peer learning, mentoring, and networks are seen as foundational for export readiness, particularly for SMEs and first-time exporters.
2. **Market Access, Branding & Demand Generation** - There is strong demand for practical market-entry support, including understanding customers, positioning products/services, and creating visibility in new markets. Digital channels are particularly important as a lower-cost, scalable export pathway.
3. **Finance, Investment & Growth Capital** - Many businesses identify capital availability as a key constraint on expansion. Support is needed across both traditional export grants and private investment pathways, reflecting different business growth stages and models.
4. **Scaling Operations & Market Delivery** - Beyond market entry, businesses recognise the challenge of scaling reliably and competitively. This includes adapting products to meet market expectations and ensuring supply chains can support increased volume and geographic reach.
5. **Export Compliance & Regulatory Support** - While not the top concern, regulatory complexity remains a barrier, particularly for food, manufacturing, and regulated service exports. Targeted guidance is likely most valuable when paired with hands-on mentoring.
6. **Businesses Not Seeking Support** - A small proportion of businesses feel confident expanding independently, typically mature firms, niche operators, or those not currently focused on growth or exports.

Key Insights: Export Activity

While there is strong interest to expand into new markets, both within Australia and across the globe, yet there are some key challenges businesses need to overcome.

Export challenges across all sectors include:

- A. **Logistics and Supply Chain**
 - Shipping, freight and transport costs are particularly acute for Northern Rivers due to distance from distribution hubs.
 - Supplier shortages & unpredictable availability.
 - Extreme weather disrupting transport (flooding, road closures).
- B. **Regulatory Barriers**
 - Need for product testing to EU/Japan standards (e.g. Lemon Myrtle).
 - Tariffs, customs compliance and export paperwork complexity.
 - Slow or complex Development Applications (DA) affecting expansion of export capability.
- C. **Workforce Shortages**
 - Chronic shortage of skilled staff across almost all sectors.
 - High housing costs making regional recruitment difficult.
 - Limited local training pipelines for export-critical skills (technical, manufacturing, marketing)



D. Cost Pressures

- Proximity to suppliers and transport hubs can increase transportation costs.
- Insurance, energy costs, and input price volatility reduce margins and competitiveness.

E. Infrastructure Limitations

- Digital connectivity issues eg. internet reliability, mobile coverage.
- Lack of industrial/commercial land for scaling production.
- Need for flood-free industrial precincts.

Export opportunities across all sectors include:

A. Increased Access to Export Support

- Export grants and financing
- Trade missions
- Market research on international opportunities
- Regulatory guidance

B. Digital Market Expansion

- Significant interest in e-commerce, online marketplaces, and digital marketing to expand export markets.
- AI used for product recommendations, CRM, demand forecasting, and efficiency.

C. Collaboration & Collective Marketing

- Joint regional branding (e.g. “Northern Rivers provenance”).
- Co-operative distribution, shared warehouse/logistics solutions.

D. Sustainable & Provenance-based Export Growth

- Strong global demand for Australian clean, organic, native and ethical products (e.g., Manuka, Lemon Myrtle, regenerative agriculture).
- Opportunity to position Northern Rivers as a climate-resilient, premium-quality production region.

Exporting by Sector: Manufacturing (Food & Non-Food)

This is the most export-engaged sector with half already exporting and 15 out of 18 business either already exporting or interested in exporting. Food products include Manuka honey, lemon myrtle, dairy, condiments, snacks, beverages. Non-food products include cleaning products, eco-products, solar technology components.

There is a strong global demand for **clean, green, chemical-free** and **native-ingredient** Australian products which bring opportunities for this industry.

Challenges this sector are experiencing include:

- Freight costs are a barrier to export scale.
- Quality standards/testing for high-regulation markets (EU/Japan).
- Access to raw materials, packaging, and local processing infrastructure.
- Energy prices and insurance in flood zones.



Exporting by sector: Professional, Scientific & Technical Services

Within this sector there are only a few respondents already exporting but nearly one third are either already exporting or interested in exporting. These respondents offer a range of services including:

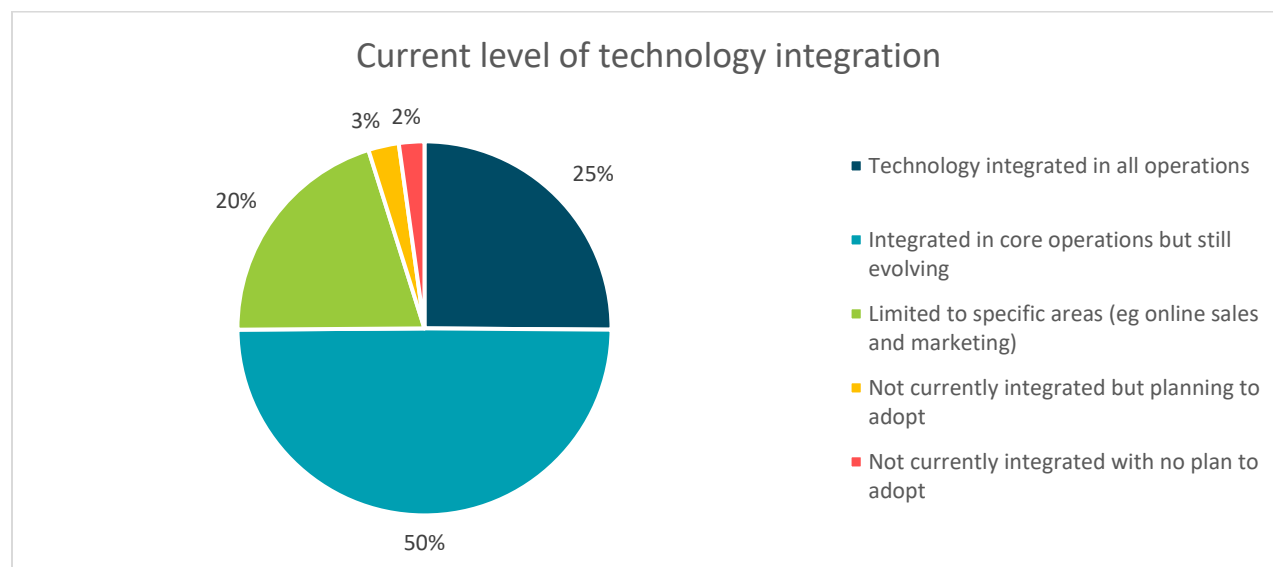
- Consulting services including project management, leadership coaching and training
- Specialist engineering
- Project management
- Environmental and sustainability services
- AI and digital transformation services



2.2 Role of Technology in Business

Current technology integration

When asked about the level of technology integration within their business right now, majority of respondents (95%) said they did have some form of technology integrated within their business, but the level of integration varied a lot.



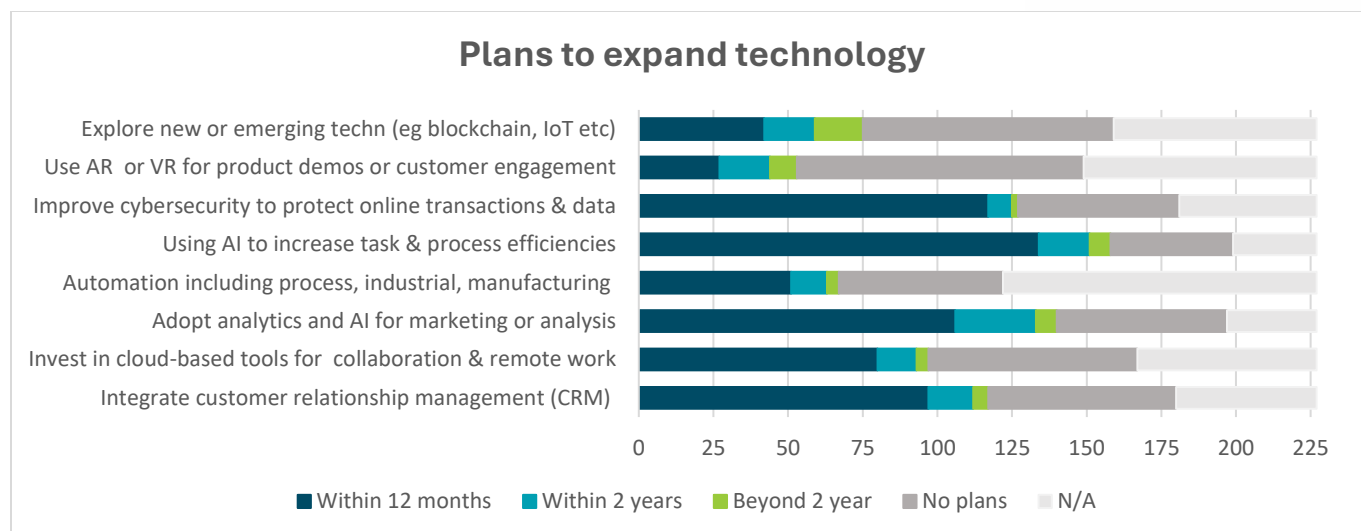
Survey question: *How would you describe your business's current level of technology integration?*

Plans to expand technology

We then asked about their plans to expand technology within their businesses and promoted with eight types of technology and asked about their plans to implement. Of all respondents, 70% said they were keen to expand their use of AI to increase efficiencies with just under two thirds adopting data analytics and artificial intelligence (AI) for personalised marketing or analysis.

Even respondents who said Technology was integrated in all operations, still had plans to expand the use of technology across many or all of the below areas. This shows that technology is constantly evolving and needs to be a consistent focus for all businesses to continue to operate efficiently and effectively, but also securely.





Survey question: *How do you plan to expand your use of technology? Please indicate timing.*

We asked whether there were other areas of technology or ecommerce businesses were exploring or areas they needed help with. Collectively, the responses highlight strong interest in technology as an enabler of efficiency and growth, tempered by practical barriers around skills, cost, integration, and implementation support. Below is a summary of their responses:

- **Artificial intelligence (AI)** was commonly mentioned. Interests included AI for process automation, scheduling, forecasting, cross-selling, customer service (including chat, phone and translation), data analytics, and decision-making efficiency.
- **E-commerce and digital capability** were also frequently raised, particularly around direct-to-consumer booking, subscription models, online learning platforms, digital products, and improved website functionality, SEO, and CRM integration.
- **Integration across systems** (booking, POS, accounting, inventory, CRM) was a recurring challenge, alongside the need for better data visibility, revenue dashboards, and automation to reduce manual administration.
- Other notable areas included digital marketing, workforce enablement, field safety technology, logistics, drone and spatial technologies, sustainability and reporting systems, and sector-specific needs such as construction, agriculture, tourism, wellness, and events.

Survey question: *Are there any other technology and/or ecommerce advances you are exploring or areas you need help with?*



Plans to expand ecommerce

When asked about their plans to expand use of ecommerce and timings to do so, more than two thirds of respondents plan to expand online sales, improve the user online experience and increase their digital marketing efforts.



Survey question: *How do you plan to expand your use of ecommerce? Please indicate timing.*

Key Insights: Technology

Key technology challenges across all sectors include:

- Connectivity issues - due to poor digital infrastructure (internet, mobile coverage). This leads to slow internet and limits system effectiveness eg. cloud, POS.
- Workforce capability - Lack of skilled local staff to implement or manage tech including systems, AI, marketing automation. Lack of housing exacerbating this issue.
- Cost and ROI concerns - High upfront costs of software, hardware, training with uncertain returns and rapidly changing systems.
- Integration problems – many businesses run multiple systems (POS, booking system, CRM, finance) and they don't often talk to each other, especially heard within tourism, hospitality, health.
- Limited knowledge and understanding - Limited time or knowledge to evaluate new systems and low confidence adopting AI despite high interest.



Technology Opportunities

The Northern Rivers is well placed to strengthen its digital capability and economic resilience by building a coordinated, region-wide technology ecosystem that supports businesses at all stages of maturity. Targeted initiatives such as a digital enablement program and a dedicated technology hub could lift capability in AI, cybersecurity, e-commerce, data analytics and systems integration, while reducing the fragmentation many businesses experience when adopting new software. Coupled with improved digital infrastructure, particularly mobile coverage, high-speed connectivity and cloud-ready industrial precincts, these initiatives would enable local enterprises to operate more efficiently, scale faster, and compete more effectively in national and global markets.

With its strong education, agriculture, tourism and creative foundations, the region also has a clear opportunity to align workforce development and industry clustering. Partnerships with TAFE and universities could build practical skills in digital marketing, AI, automation and data analytics, while targeted tech clusters, such as AgTech, food manufacturing, tourism and experience-economy platforms, and creative and screen technologies, would encourage collaboration, innovation and investment. Together, these opportunities position the Northern Rivers to become a digitally enabled regional leader, supporting productivity growth, workforce participation and sustainable economic diversification.

Technology by Sector

Health Care & Social Assistance

Current tech use	Opportunities	Challenges
- Mostly cloud-based systems, digital case management, scheduling tools. - Tech is used mainly for efficiency, compliance, and remote work (NDIS, aged care). - Some innovative providers exploring AI scheduling, client communication, workforce coordination.	- AI for rostering and client management. - Telehealth and remote service delivery expansion. - Shared platforms between community service organisations to reduce admin load.	- Limited internal IT capability. - Privacy, compliance, and security requirements slow adoption. - Workforce shortage creates no time to implement new tools.



Construction

Current tech use	Opportunities	Challenges
There is mixed adoption of technology within this sector. Smaller operators use tech mainly for communication, quoting, invoicing, while larger firms and those working interstate use: • Cloud project management systems • Digital safety tools • Drones/AR for site inspection • AI for estimating / tendering (interest growing)	• AI-enabled project planning, risk detection, job costing. • Digital twins / BIM for complex builds. • Automation in prefabrication, modular construction, and materials tracking. • Workforce digital upskilling partnerships.	• Skill shortages, especially digital literate supervisors and project managers. • Low margins make it hard to invest in new systems. • Integration issues between estimating, scheduling, procurement, and finance tools.

Retail Trade

Current tech use	Opportunities	Challenges
• Ecommerce platforms (Shopify, Amazon, eBay). • POS systems, stock management, loyalty systems. • Social media marketing & AI-supported content.	• Advanced personalisation using AI. • Automated stock management. • Shared last-mile distribution logistics in the region. • Regional e-commerce collective marketing (e.g., “Buy Northern Rivers”).	• Poor local internet/mobile coverage affects cloud POS. • Lack of digital staff (marketing, ecommerce). • Freight cost + slow delivery limits online competitiveness.

Education & Training

Current tech use	Opportunities	Challenges
• Mostly cloud-based learning management (LMS). • Some AI-enabled training content. • Use of digital tools for student engagement and remote teaching.	• Exportable online micro-credentials. • VR/AR training simulations (construction, health, trades). • AI-driven training platforms for personalised learning.	• Funding constraints limit investment. • Hard to recruit trainers skilled in both teaching and tech. • High compliance demands limit exploration.



Accommodation & Food Services

Current tech use	Opportunities	Challenges
This sector is rapidly modernising with: • CRM + automated guest journeys • Yield & revenue management systems • Integrated booking platforms • AI-powered marketing • Kitchen automation and inventory tools • Unified booking engines across multiple venues	• Regional shared destination marketing data platform. • Automated cross-sell/upsell tech for hospitality/ weddings/ events. • Hospitality-specific AI copilots for reservations & guest enquiries.	• Systems rarely “talk to each other”. • Skilled digital staff (marketing/sales/CRM) very hard to find. • Internet connectivity in hinterland locations.

Professional, Scientific & Technical Services

Current tech use	Opportunities	Challenges
• AI for analysis, modelling, marketing. • Cloud-based project systems. • Remote collaboration tools. • Specialist software (CAD, GIS, lab systems). There is a high uptake of technology within this sector as you might expect.	• Growth of exportable digital services (consulting, design, environmental science). • AI-supported research, analytics, modelling. • Collaboration with universities on R&D.	• Need for specialised digital talent. • Poor regional connectivity limiting remote service delivery. • Integrating multiple tools used across projects.

Manufacturing (Food & Non-Food)

Current tech use	Opportunities	Challenges
This sector were the strongest adopters overall, currently using: • Automation (processing, packing, inventory). • Digital quality testing. • E-commerce for export (esp. food). • AI for production forecasting, energy optimisation. • Cloud-based ERP (some implementing first time).	• Regional shared food testing/QA laboratory. • Robotics for small-scale producers. • Export compliance software. • AI for product development & shelf-life modelling.	• High cost of equipment and upgrades. • Difficult to hire technically skilled operators. • Need for EU/Japan standard testing and traceability systems. • Poor digital connectivity affects cloud production systems.



Agriculture / Forestry / Fishing

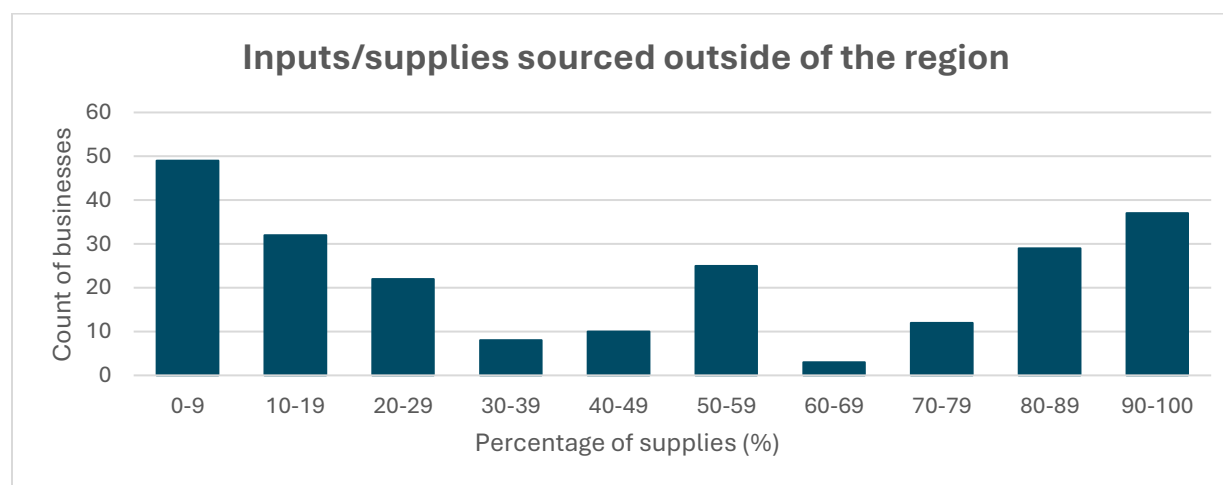
Current tech use	Opportunities	Challenges
Early-stage adoption of: - Automated irrigation, sensors, drones. - Cloud farm management. - Digital record-keeping for biosecurity.	- Agtech collaboration hubs. - Shared equipment pools. - Blockchain/traceability for export markets.	- Cellular dead zones. - Cost of technology for small farms. - Lack of local technical support.

2.3 Supply Chain and Localising Opportunity

Supplies Sourced Outside of the Region

Businesses were asked about their supply chain, including the proportion of supplies sourced outside of the region. Responses showed a polarised pattern, with many businesses sourcing either a very high or a very low share of supplies outside of the region. Just over one in five businesses said they source less than 10% of their supplies from outside of the region.

There was also a noticeable increase in responses around the midpoint, with a higher number of businesses reporting that approximately half of their supplies were sourced outside. This mid-range concentration may indicate that many respondents provided estimates rather than precise figures.



Survey question: *What percentage of your inputs are sourced outside of the Northern Rivers/Tenterfield region? (0 = 0%, 100 = 100%)*



Supplies Sourced Locally

Following this question, we asked what input/supplies businesses currently source locally. The data shows that local sourcing is already strong and values-driven, particularly where goods and services are readily available, reliable and relationship-based. The most commonly sourced local inputs fall into four broad categories:

1. **Labour and services** – Many businesses prioritise sourcing local staff, contractors and professional services, including trades, maintenance, cleaning, bookkeeping, accounting, legal services, marketing, IT support and consultancy. This is especially evident across construction, hospitality, professional services, health, community services and creative industries. For many respondents, local labour is their *primary* local input, reflecting both commitment to the regional workforce and the difficulty of outsourcing people-based services.
2. **Food, agriculture and natural inputs** – Hospitality, food manufacturing, agriculture and tourism businesses frequently source local produce, meat, dairy, fruit and vegetables, as well as farm inputs, honey, botanicals and raw agricultural materials. This reinforces the region's strong paddock-to-plate and provenance-based economy, with many businesses explicitly stating a preference for local suppliers where possible.
3. **Operational and business inputs** – Businesses commonly source office supplies, printing, stationery, cleaning products, fuel, packaging, waste services and basic consumables locally. While these are often lower-value inputs individually, together they represent significant day-to-day local economic circulation.
4. **Maintenance, trades and property services** – Local electricians, plumbers, builders, mechanics, equipment hire, grounds and facilities maintenance are widely used across sectors. This is particularly strong in construction, manufacturing, hospitality and community services, where rapid response and familiarity with local conditions are valued.

While the intent to source locally is very strong, responses also highlight there are clear limits to what can be sourced within the region. Many businesses note that they would like to source more locally but are constrained by:

- **Availability and scale** (local suppliers unable to meet volume or consistency needs)
- **Specialist capability gaps** (e.g. labs, advanced manufacturing, high-end technical services)
- **Price competitiveness**, particularly where freight, insurance or compliance costs are high

This aligns closely with insights gained throughout the survey, which show that local supply chains are vulnerable to disruption and capacity constraints, not lack of demand.

Survey question: *What major or key inputs/supplies does your business source locally?*



Interest in Sourcing Locally

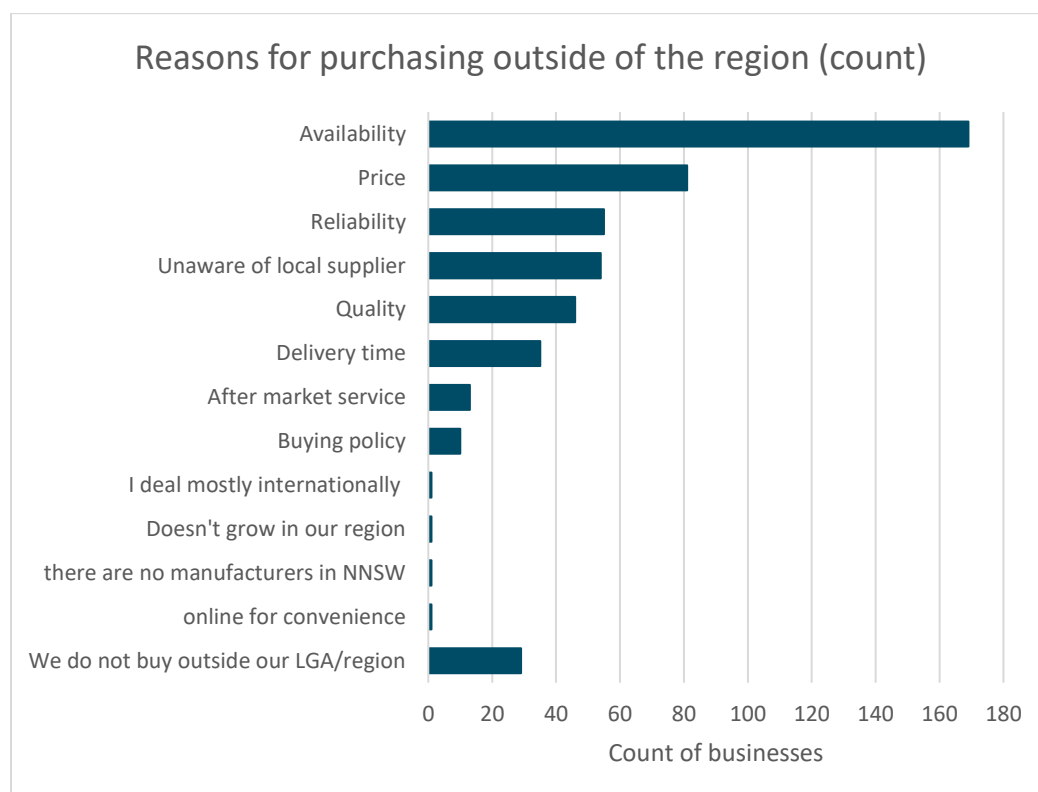
We asked businesses what they would like to source locally and the responses were varied. They ranged from fresh produce and dry goods, to building materials, linen, IT software and packaging to a variety of services. Labour was commonly mentioned as something businesses wish they could source more of locally.

Many businesses express a desire to source locally, but the survey shows that local supply chains are often unable to meet volume, consistency or pricing needs, forcing businesses to source externally despite higher costs. This reinforces the broader insight that improving transport, industrial land and local production capacity would directly strengthen supply chain resilience and reduce operational risk.

Survey question: *What would your business like to source locally that you currently don't?*

Reason for Supplies Sourced Outside

The main reason for sourcing supplies outside of the region was Availability (75%) followed by Price (35%). Nearly one quarter of businesses sources supplies outside of the region as they were Unaware of local suppliers.

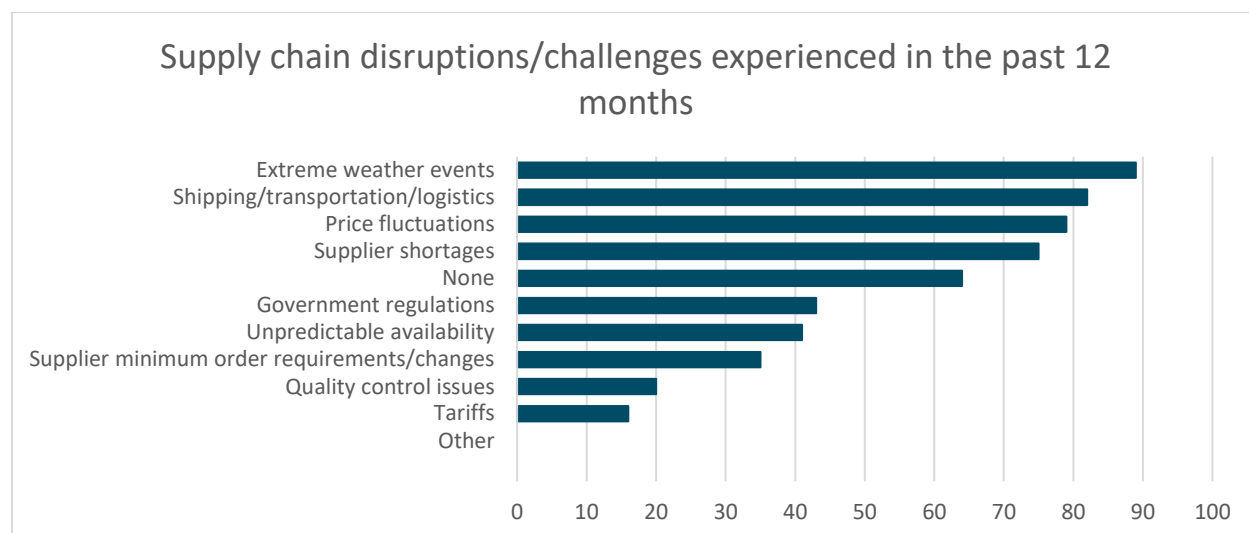


Survey question: *What are the main reasons for purchasing good/services from outside of LGA/Region?*



Supply chain disruptions

The most common supply chain disruptions experienced over the past 12 months was most common due to Extreme weather events, followed by Shipping/ Transportation/ Logistics, Price Fluctuations and Supplier Shortages.



Survey question: *What supply chain disruptions/challenges has your business experienced in the past 12 months?* At the end of this section, we asked if there was anything more they would like to share or need help with relating to supply chain or market growth and development. High freight costs were mentioned by many businesses, while other responses varied but are summarised below.

- **High freight costs** have big impacts on local businesses, particularly within regions and towns further from the main highway.
- **Market growth** was also mentioned a lot for varied reasons. Some require marketing assistance or understanding of new markets while others want to see growth in tourism to increase demand.
- **Financial pressures** from business expenses, cost of living impacts on customers and leading to challenging finding staff.
- **Skilled labour shortages** was also raised as well as the challenges to find reliable workers.
- **Lack of awareness of local suppliers** in packaging, printing, marketing, improved freight, export logistics, regulatory compliance etc.

Survey responses highlight a clear opportunity to strengthen local supply chains and export readiness through a regional audit and coordination hub focused on packaging, freight, marketing and market access services, helping businesses source locally and expand into new markets with confidence.



Survey question: *Is there anything else you would like to share or need help with relating to your supply chain or market growth and development?*

Key Insights: Region-Wide Supply Chain Pressures

A **Regional Market Access & Supply Chain Hub** could improve business growth, local procurement and export readiness by:

- Conducting a local audit of existing suppliers in packaging, printing, logistics, freight, marketing and export-related services
- Mapping capability, scale, certifications and service gaps across the region
- Creating a central, easy-to-navigate directory for businesses seeking local suppliers
- Providing practical guidance on export readiness, including packaging standards, freight options, compliance and market selection
- Supporting collective approaches, such as shared freight, group purchasing, or cooperative export pathways

Key Insights: Region-Wide Supply Chain Pressures

Across almost every industry, businesses reported multiple concurrent supply chain pressures. The main themes include:

- **Shipping, Freight & Logistics Disruptions** – including rising freight costs, long and unpredictable delivery times and limited courier options.
- **Price Fluctuations & Increased Costs** – volatile input prices, particularly in building materials, fresh produce, packaging and energy and many businesses cannot pass these costs on to customers.
- **Extreme Weather & Natural Disaster Impacts** – floods, storms, heatwaves, and road washouts cause delivery delays, supplier shutdowns, spoilage & stock loss and insurance spikes. This is particularly pronounced in Lismore, Tweed, Byron hinterland.
- **Changes to Minimum Order Requirements, Tariffs & Regulation** – impacts businesses ability to plan when rules and costs constantly change without any foresight.
- **Quality Control Issues** – some sectors see inconsistent product quality from suppliers dealing with their own disruptions.



Key Insights: Supply Chain by Sector

Food Manufacturing & Agriculture

Themes	Impacts
- Raw ingredient shortages (milk, fruit, botanicals, herbs, honey production inputs). - Severe freight challenges for perishable goods. - Varroa mite and biosecurity pressures (beekeeping, pollination). - Need for EU/Japan-standard testing to export.	- Reduced capacity to meet demand. - Higher storage costs. - Difficulty exporting due to compliance/testing gaps.

Construction & Trades

Themes	Impacts
- Difficulty sourcing timber, steel, specialty hardware. - Long delays for prefabricated components or imports. - Regional freight unreliability impacts job scheduling.	- Project delays & cost overruns. - Challenges quoting accurately long term. - More pressure on local trades and subcontractors.

Retail Trade

Themes	Impacts
- Delays for stock deliveries (particularly from overseas). - Shortages of packaging, POS supplies, equipment parts. - Minimum order requirements unsuited to small retailers.	- Lost sales. - Inability to maintain consistent product lines. - Rising costs reducing margins.

Accommodation & Food Services

Themes	Impacts
- Food ingredient shortages. - Price spikes in meat, seafood, produce, cleaning supplies. - Wine/spirits supply interruptions.	- Menu redesign. - Reduced product offerings. - Dependence on last-minute supplier swaps.

Professional, Scientific & Technical Services

Themes	Impacts
- Delays for specialist equipment, safety gear, PPE, lab supplies. - International shipping delays affecting tools/software/hardware.	- Slowed project delivery. - Higher cost base and reduced competitiveness



Health Care & Social Assistance

Themes	Impacts
• Shortages of cleaning products, consumables, equipment. • Reduced reliability from suppliers. • High sensitivity to delays due to client needs.	• Operational stress and pressure on frontline teams. • Greater reliance on local suppliers.

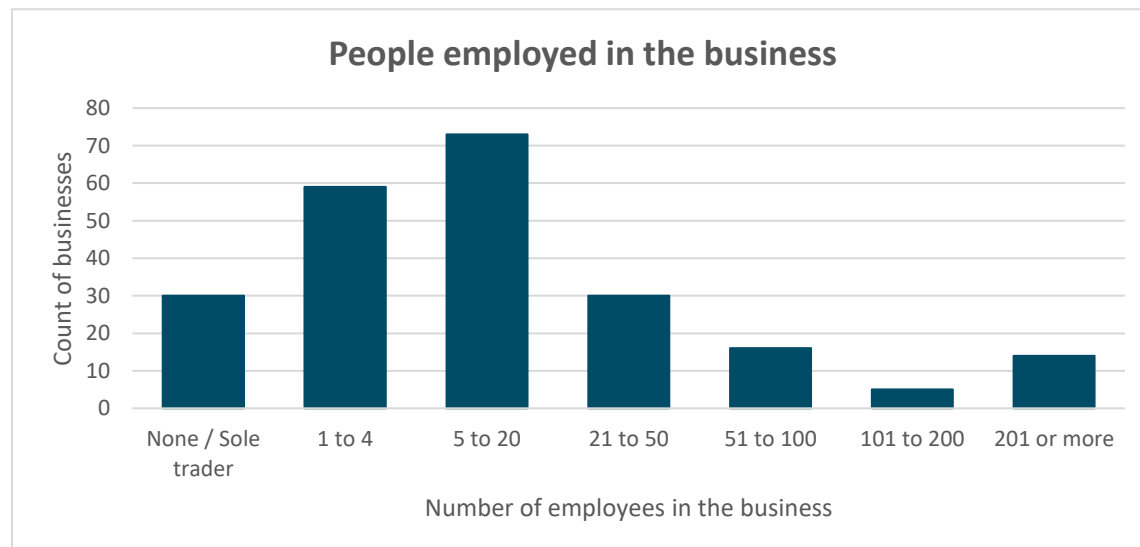
3. Employment and Workforce Development

3.1 Current Workforce

Number of Employees

Most respondents that took part in the survey were employing staff with majority employing up to 20 staff, and 14 businesses reported workforces of more than 200 employees.

The data shows a broad spread in both the range and scale of businesses represented in the Business Retention and Expansion Survey but shows that majority of respondents did employ a workforce.



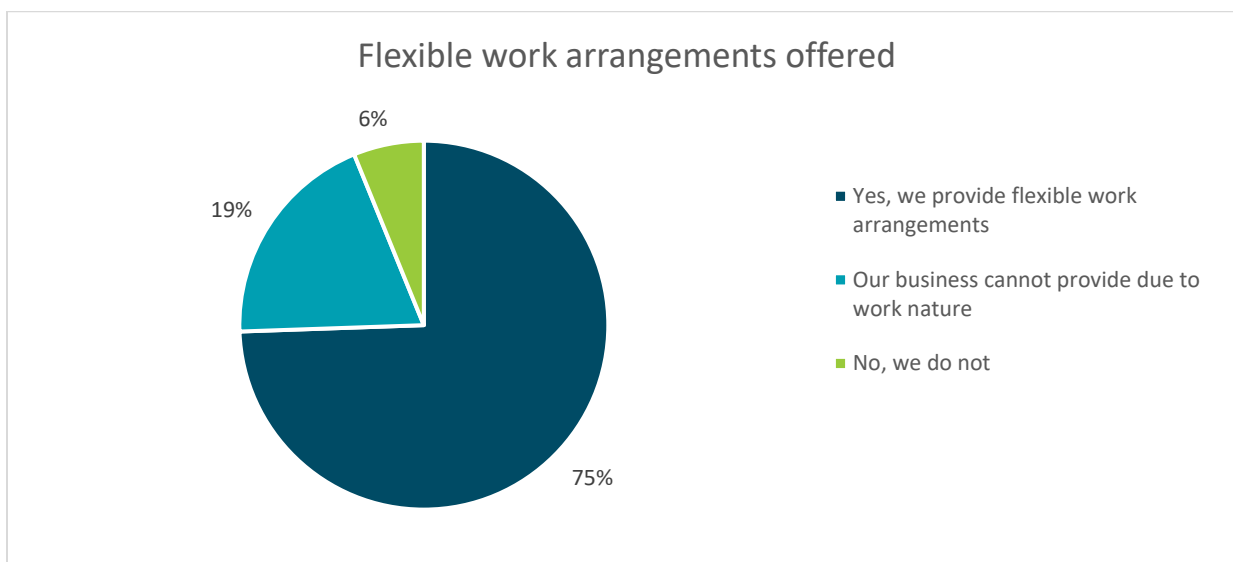
Survey question: *How many people are employed in your business?*

Across the Northern Rivers, our biggest share of businesses are non-employing (62%) with another 36% employing up to 20 staff. Only 2% of businesses within the Northern Rivers have 20 or more employees.



Flexible working

Three quarters of businesses provide flexible work arrangements for their employees but one in five businesses are unable to due to the nature of their work.



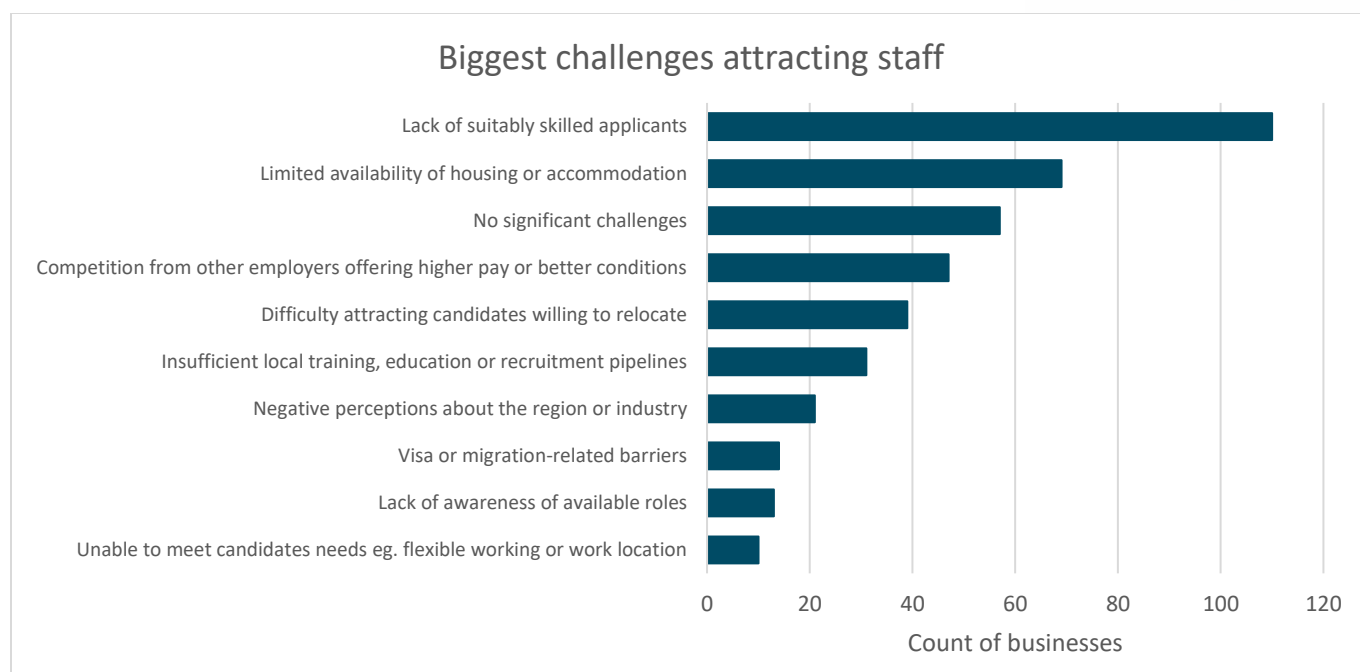
Survey question: *Does your business accommodate flexible work arrangements, eg. remote working, compressed week, part time, shared roles, varied work hours?*

3.2 Workforce Development

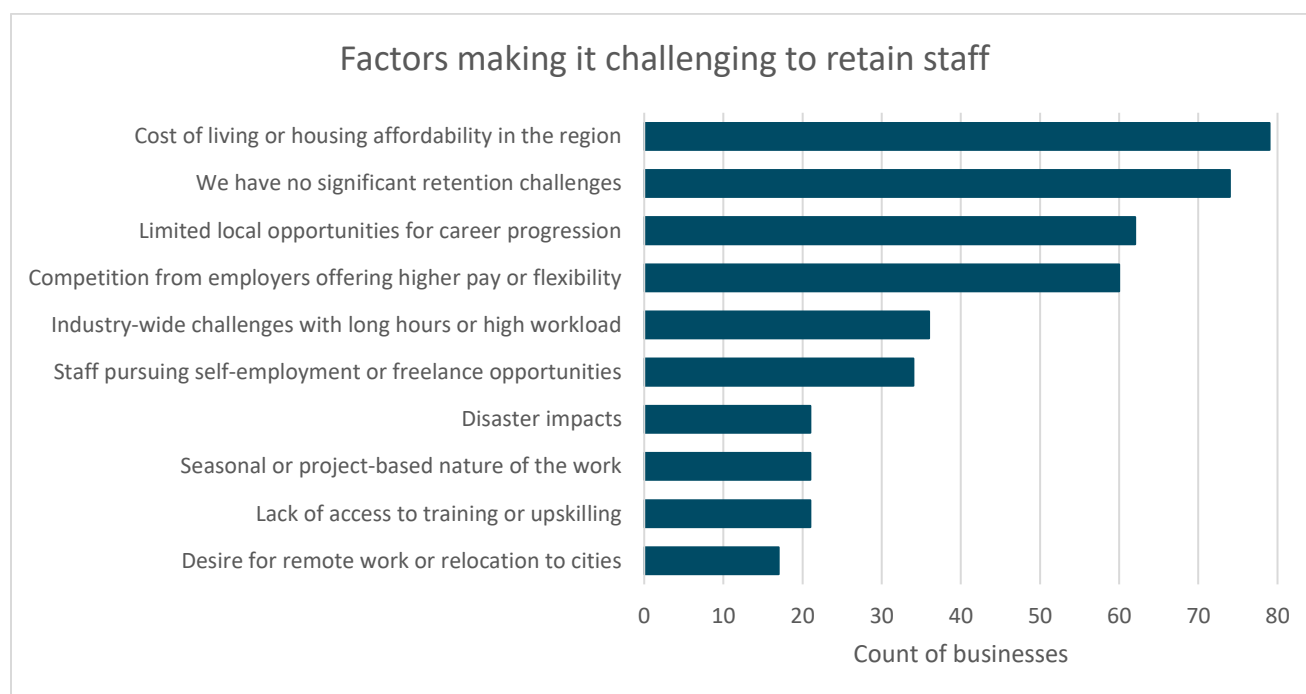
Challenges attracting and retaining staff

Lack of skills seem to be the biggest challenge facing most of respondents when recruiting new staff whereas cost of living or housing affordability and lack of career progression are the two main challenges in retaining staff.





Survey question: *What are the biggest challenges your business faces in attracting staff?*



Survey question: *What factors make it challenging to retain staff in your business or industry?*

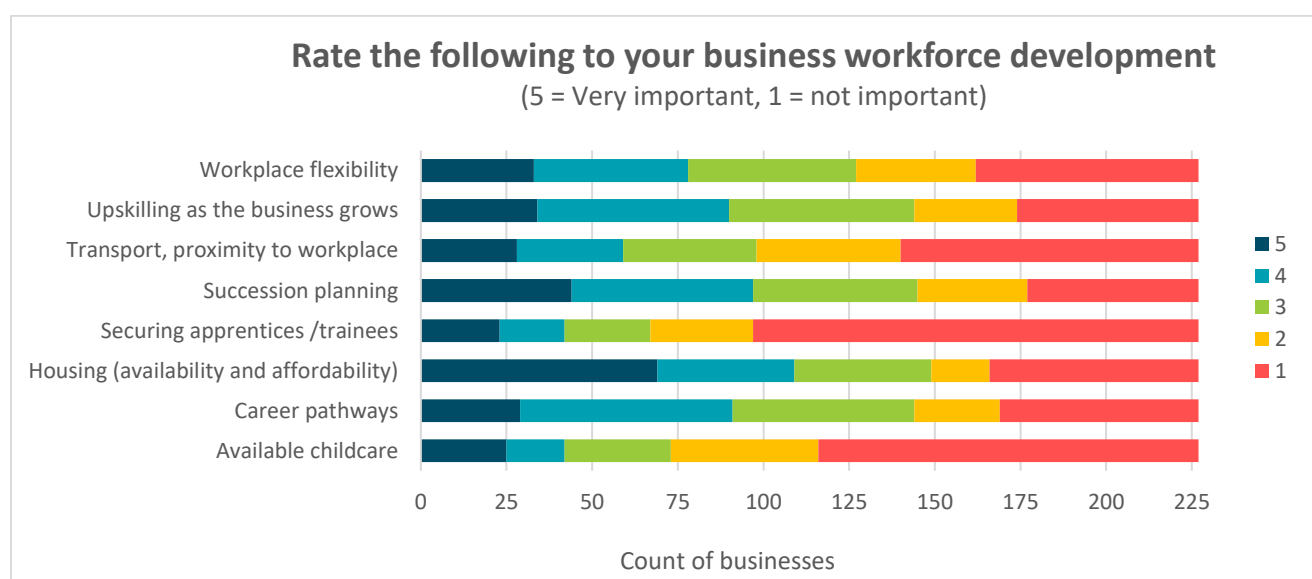
Businesses were asked if there were key skills businesses find challenging to recruit for locally when looking for staff, these were the hardest skills to recruit are:



1. Qualified chefs and hospitality leaders
2. Trade-qualified and construction professionals
3. Engineers and technical specialists with experience
4. Health, allied health, and regulated professionals
5. Mid-level professionals with real-world, applied experience
6. Candidates with strong soft skills and work readiness
7. People willing and able to work regionally

Survey question: *Are there any key skills you find challenging to recruit for locally when looking for staff? If yes, please specify.*

They were then asked to rate a list of attributes to show their level of importance to their business workforce development. Housing availability and affordability was the most important followed by succession planning, having career pathways and upskilling employees.



Survey question: *On a scale of 1-5 please rate the importance of the following to your business workforce development (1 = not important, 5 = Very important)*

Workforce Location

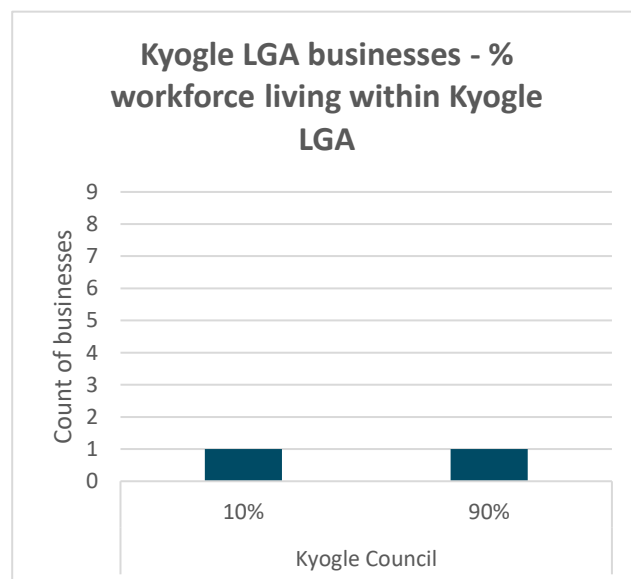
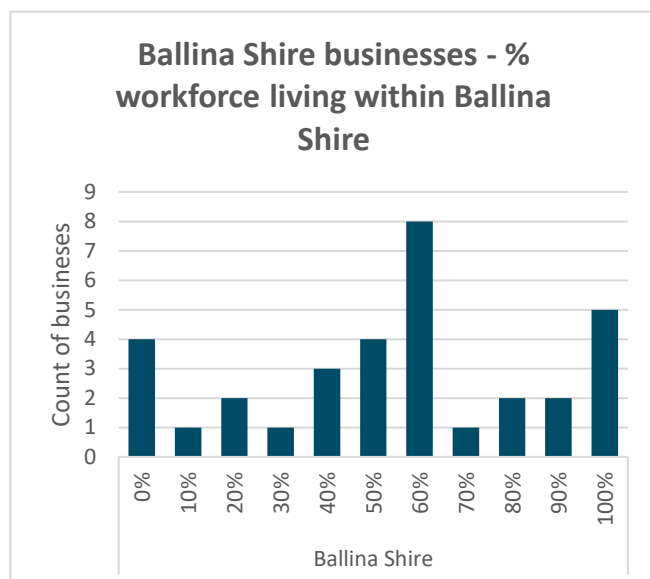
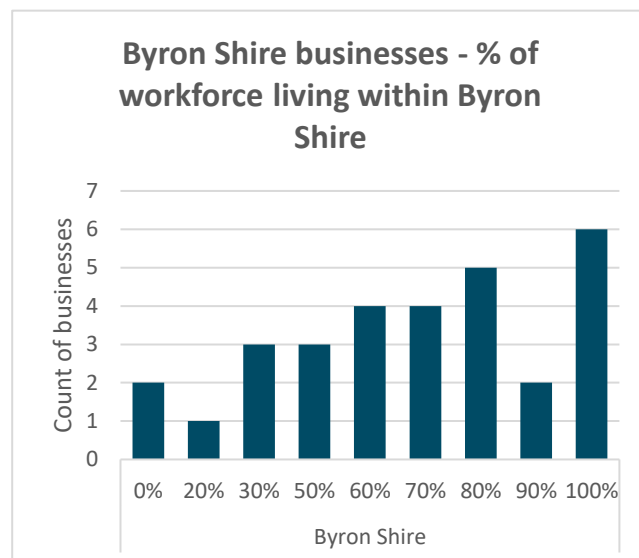
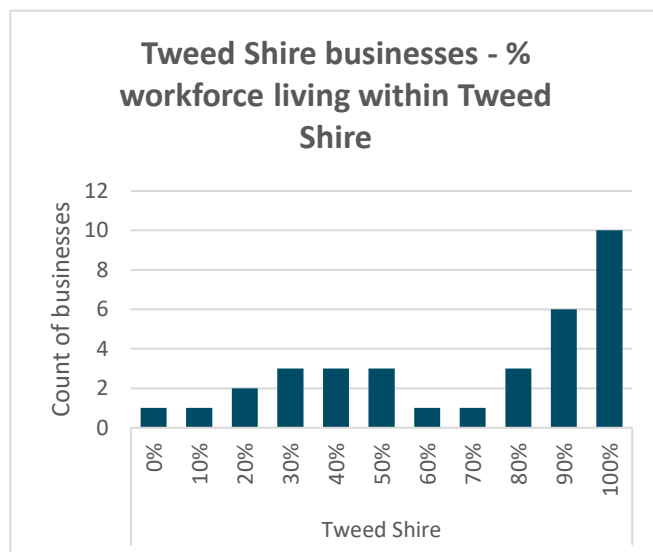
We asked businesses to advise what LGA their employees lived or whether they lived outside of the region. We listed all 8 LGAs and 'Outside of the region' and asked them to estimate the percentage of their workforce that lived within each LGA.

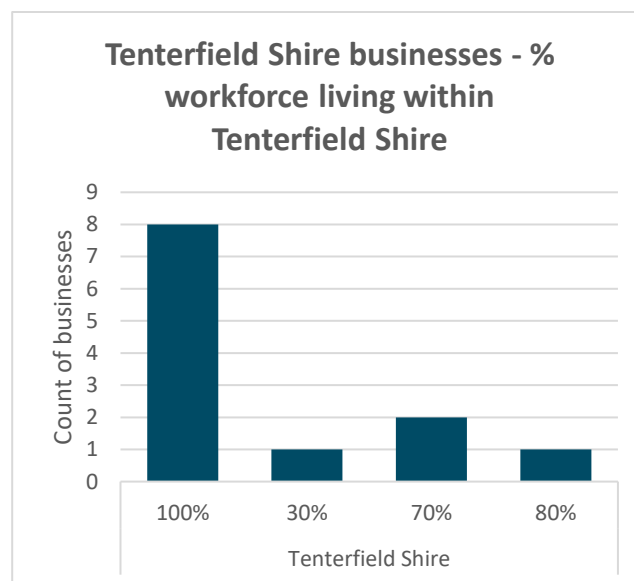
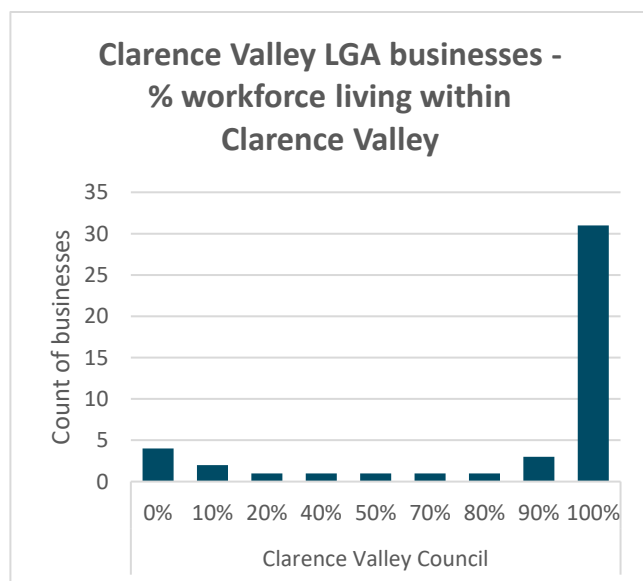
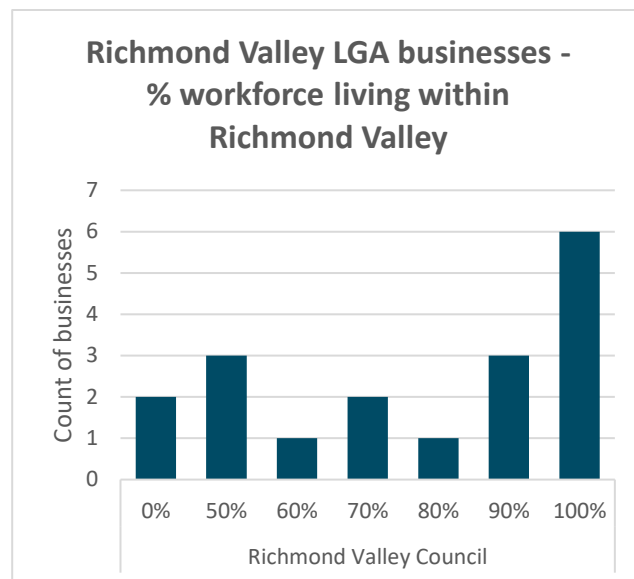
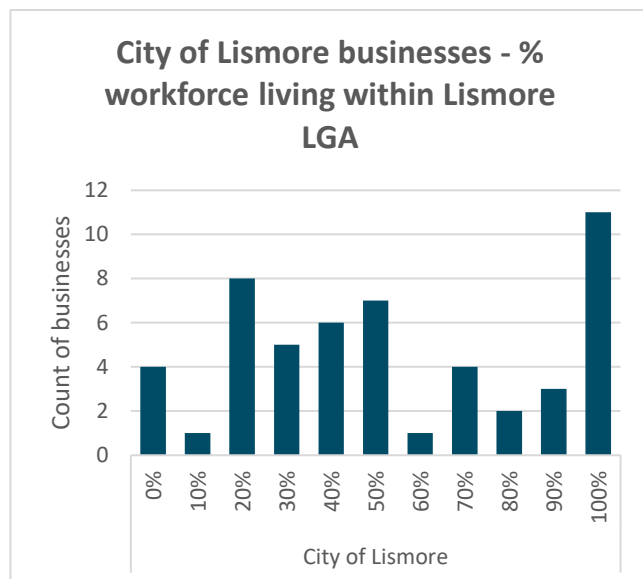
Below we have pulled a report showing businesses within each LGA and the percentage of their workforce who live within that same LGA. The LGA with the highest number of employees living and working in the same LGA was Clarence Valley with 35 out of 45 businesses having 80% or more employees living within the same LGA. More than half of



the businesses in the Tweed Shire and Richmond Valley had 80% or more of their workforce living within their same LGA.

Lismore and Ballina Shire had the lowest numbers, meaning a higher number of their workforce are living and working within a different LGA.





Survey question: *What percentage of your employees live within these areas?*

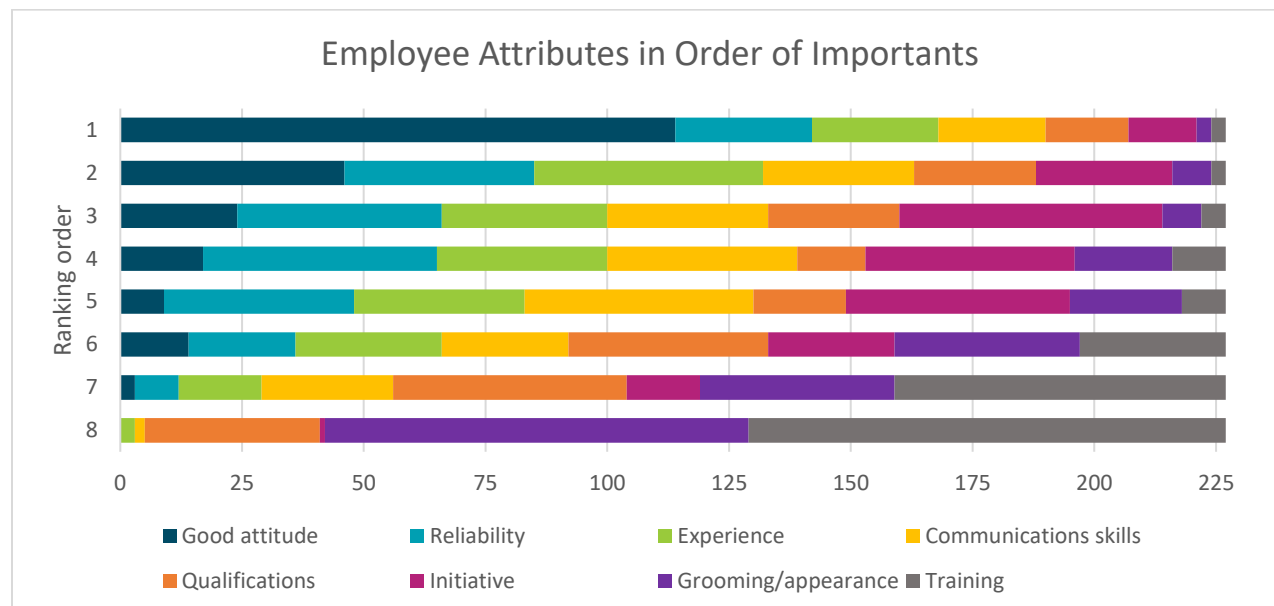
Importance of Employee Attributes

Respondents were asked to rank the following attributes in order of importance within their organisation;

- Good attitude
- Grooming/appearance
- Qualifications
- Experience
- Initiative
- Reliability
- Communications skills
- Training



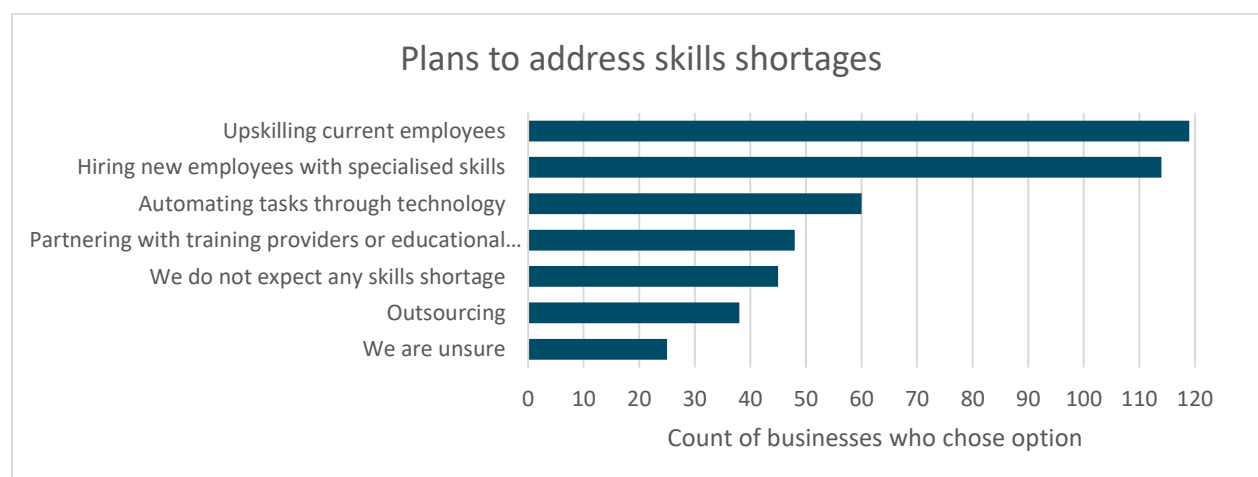
Good Attitude was chosen by half of the businesses as the most important attribute, with another 20% of businesses choosing Good Attitude as their second choice. The other top answers were Reliability and Experience. Grooming/appearance and Training seemed least important.



Survey question: Please rank the following attributes in order of importance within your organisation, from highest to lowest.

Addressing Skill Shortages

Respondents advised how they plan to address any skill shortages over the next two years, choosing from a list of options. Upskilling existing employees and hiring new employees with specialised skills were most common.



Survey question: How do you plan to address any skills shortages over the next 2 years?



A final question was asked in this section to see what other areas of help or support businesses need relating to employment and workforce development and while the answers were varied there were some common suggestions:

- **Training** – businesses mentioned they were keen for support in various training, from HR, cyber security, leadership to technology, hospitality and other training.
- **Recruitment** – numerous businesses mentioned they needed help finding the right candidates in both attitude and skillset.
- **Financial support** – being connected to potential partnerships to understanding funding or support options available

Survey question: Do you need any help or support with any aspect of your employment and workforce development?

Key Insights: Skill Shortages by Sector

The most acute skill shortages are concentrated in chef and hospitality leadership roles, trade-qualified construction workers, mid-level professional and engineering positions, and industry-ready technical skills across manufacturing and the creative industries. Across all sectors, these shortages are exacerbated by regional location factors, housing constraints, and a limited supply of experienced (rather than entry-level) candidates. A more detailed examination of key sectors identified the following issues:

Accommodation & Food Services

Most difficult skills	Insight
• Qualified chefs (multiple mentions; dominant issue) • Apprentice chefs and chefs beyond “standard pub fare” • Restaurant managers, duty managers, senior bar staff • Experienced housekeeping & grounds/maintenance staff • Hospitality leadership, beverage knowledge, FOH professionalism	Chef shortages overwhelmingly dominate this sector, compounded by housing availability and retention challenges.

Construction

Most difficult skills	Insight
• Trade-qualified workers (Cert III+): electricians (incl. solar), joinery, cabinet making • Solar electricians and installers • Commercial construction experience • Supervisors, sawyers, fencing specialists • Workers with strong quality standards (“care factor”)	Acute shortage of fully qualified trades and experienced commercial construction personnel.



Professional, Scientific & Technical Services

Most difficult skills	Insight
- Engineers (civil, design, water treatment), surveyors - Engineers with strong communication/soft skills - Survey assistants with experience - Archaeologists and specialist consultants (e.g. sustainability) - Intermediate-to-senior professionals (not graduates)	The mid-level capability gap is the key pressure point, not entry-level supply.

Food Manufacturing

Most difficult skills	Insight
- Quality assurance and compliance (export-ready) - Production and operations management - Trade and technical skills - Sales roles with specialist industry knowledge - Skilled chefs and experienced pickers	Businesses struggle most with industry-ready technical, QA, and export capability, particularly regionally based roles.

Arts & Recreational Services

Most difficult skills	Insight
- Skilled technicians (film, lighting, camera, production) - Creative professionals with teaching capability - Performing arts educators - Eco-tourism guides and specialist coaches - Fundraising, producing, and management roles	Lack of professional training pipelines locally, with talent leaving the region and not returning.

Other Services (highly diverse, but frequent challenges)

Most difficult skills	Insight
- Qualified professionals (accounting, civil engineering) - Conservation and ecosystem management (incl. Indigenous candidates) - Veterinarians and wildlife-skilled vet nurses - Customer service with initiative and work ethic - Staff willing to travel and work regionally	Skill shortages here are driven by specialist qualifications + regional constraints.



4. Business Plans and Decisions

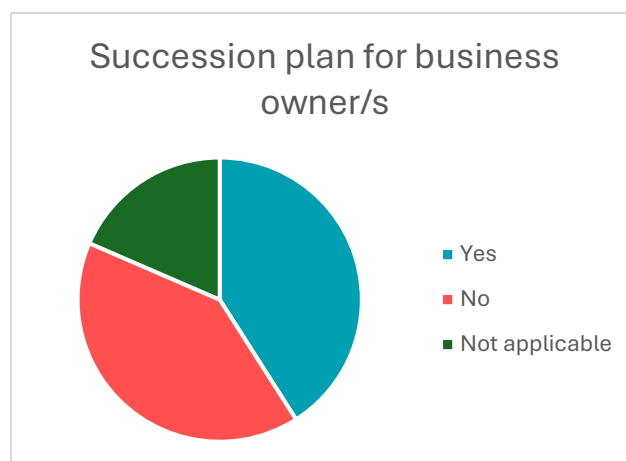
4.1 Business Planning

Succession Planning

Business Owners

Only 41% of businesses surveyed (93 businesses) have a succession plan in place in the event the owner/s wish the exit the business. With the same percentage saying No, they didn't have a succession plan in place for the business owner/s.

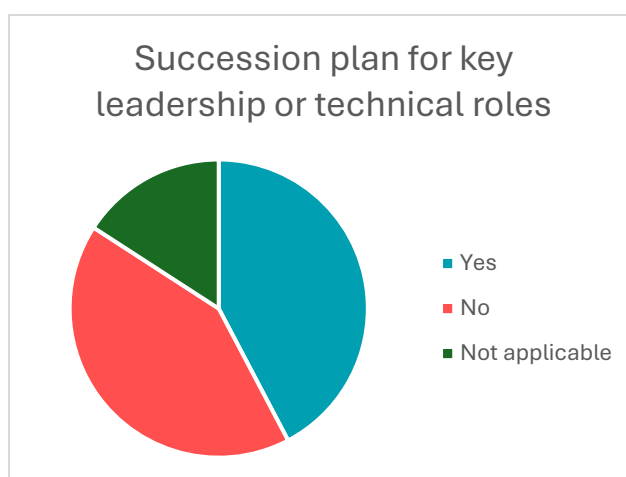
Survey question: *Do you have a succession plan in place in the event that the owner/s wish to exit the business?*



Key leadership and technical roles

A similar number of businesses (42%, 96 businesses) had a succession plan in place for other key leadership and technical roles with a similar number (42%, 95 businesses) saying No to this question.

Survey question: *Do you have a succession plan in place for other key leadership or technical roles?*



Business Plans

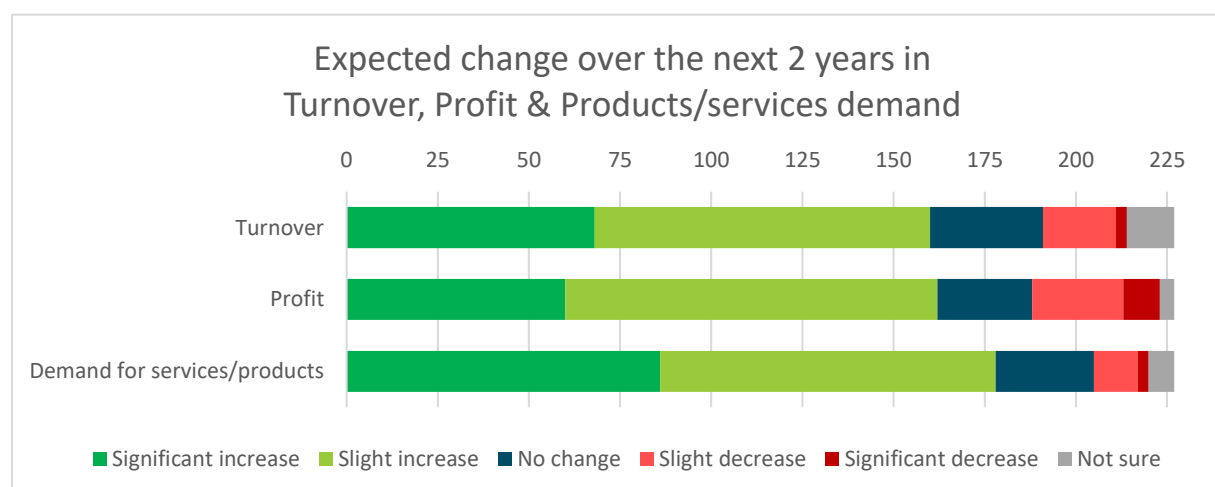
When we asked businesses whether they were planning to relocate their business, only 13% answered yes, with majority of these relocating within their current LGA.

Are you currently considering changing the location of your business? If yes, where are you considering locating to?	
	Count
Yes	29
Another location in my LGA	14
Elsewhere in Australia	2
Elsewhere in NSW	6
Elsewhere in the Northern Rivers	7
No	198
TOTAL	227

Of those businesses who mentioned they were relocating to somewhere else within NSW or Australia (8 businesses), their reasons included larger populations which offered both better access to customers and workers. Accessibility to products and services was also mentioned and moving to an area less impacted by natural disasters.

Plans for the next 2 years

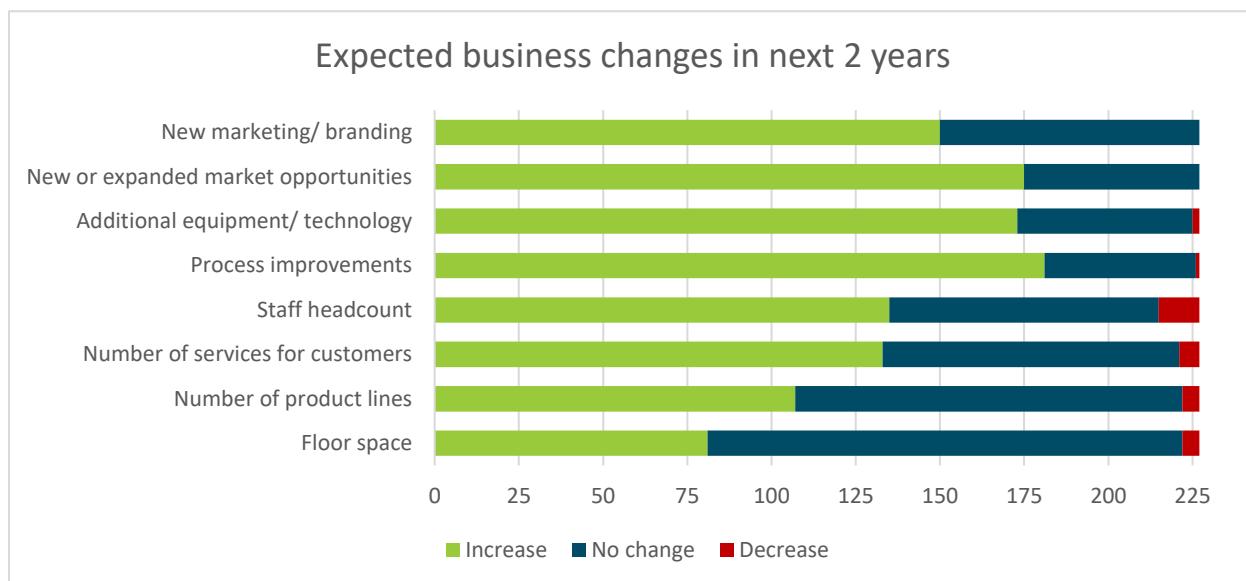
Majority of businesses are expecting Demand for Products and Services to increase as well as Turnover and Profit within the next two years.



Survey question: During the next 2 years, how do you expect the following to change for your businesses?



Majority of businesses are expecting an increase in Process Improvements, likely through AI usage, new market opportunities and additional equipment or technology.



Survey question: *During the next 2 years, how do you expect the following to change for your businesses?*

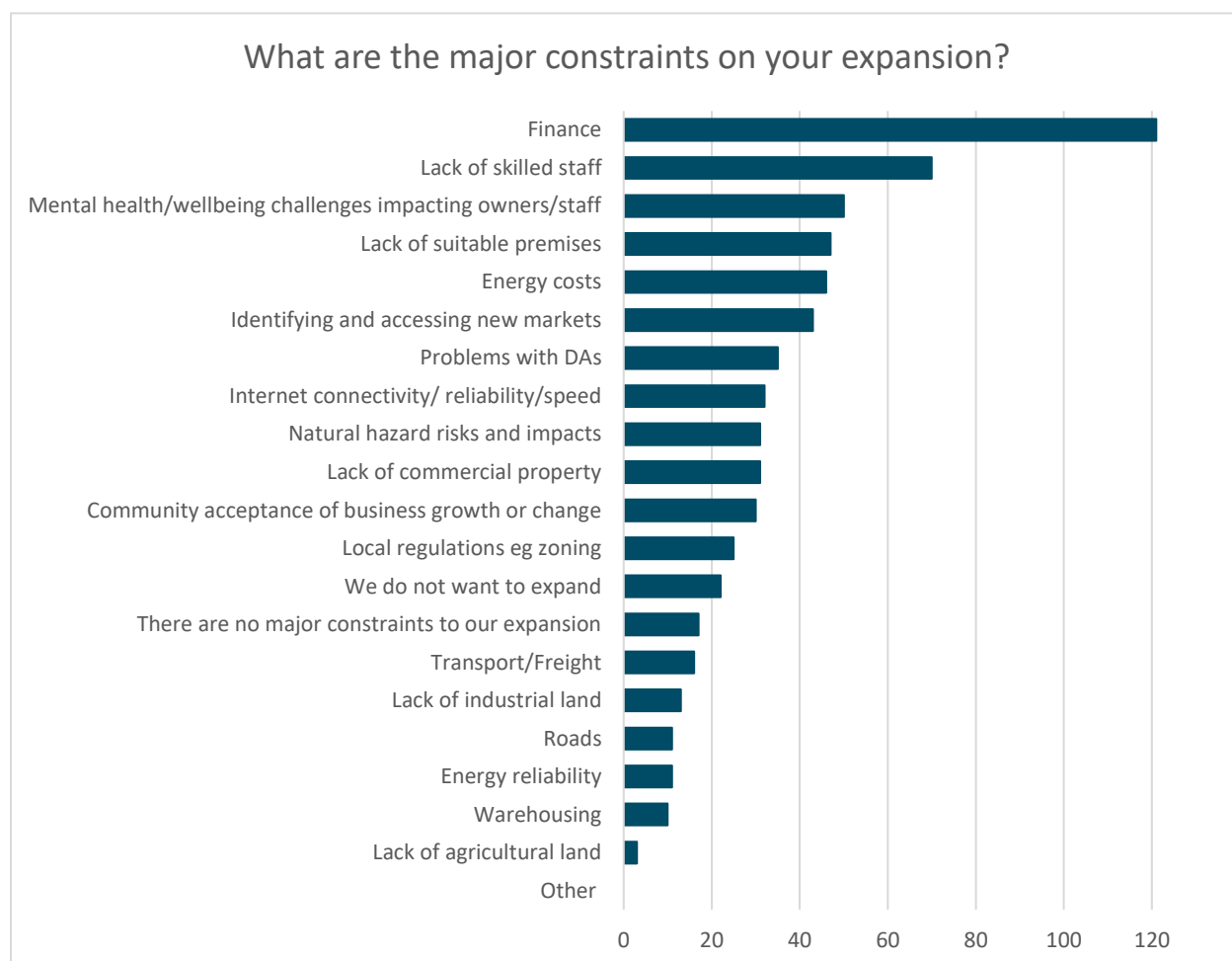
Other changes businesses mentioned they expected to see in the next two years within their business were new products/services, increased AI use and automation with a few less positive comments around a reduction in volunteers and continued increased costs of doing business (regulation, insurance, wages, energy etc)

Survey question: *Are there any other changes you expect for your business within the next 2 years?*



Constraints on Expansion

Most businesses (121) listed Finance as the major constraint on businesses expansion.



Survey question: *What, if any, are the major constraints on your expansion?*

Business Management Skills

Businesses were asked what skills they would like to improve within their business and the top response was Navigating business grants or incentives, followed by Marketing. Technology and systems came into the third and fourth place.

General business management skills were commonly chosen as well including business strategy, business planning, people management, succession planning and leadership development. There is an opportunity to offer mentoring, training and courses in these areas to help regional businesses thrive.





Survey question: *Which of the following business management skills would you or your staff like support in improving in your business?*

Government Connections

Respondents mentioned they would be keen to connect with different local, state and/or Commonwealth Government departments. From a list of options, they marked the organisations and agencies they were keen to connect with for support.

Business Connect is no longer running, yet 30% of businesses said they would be keen to connect with this agency/program.



Government organisation	Count of businesses
Business NSW/Regional Office	92
Local Council	86
Regional Development Australia	81
Business Connect (provided by NSW State Government)	71
NSW Department of Primary Industries and Regional Development	56
AusIndustry/Business Advisory Service	51
AusTrade	30
Business Bureau	26
None	64

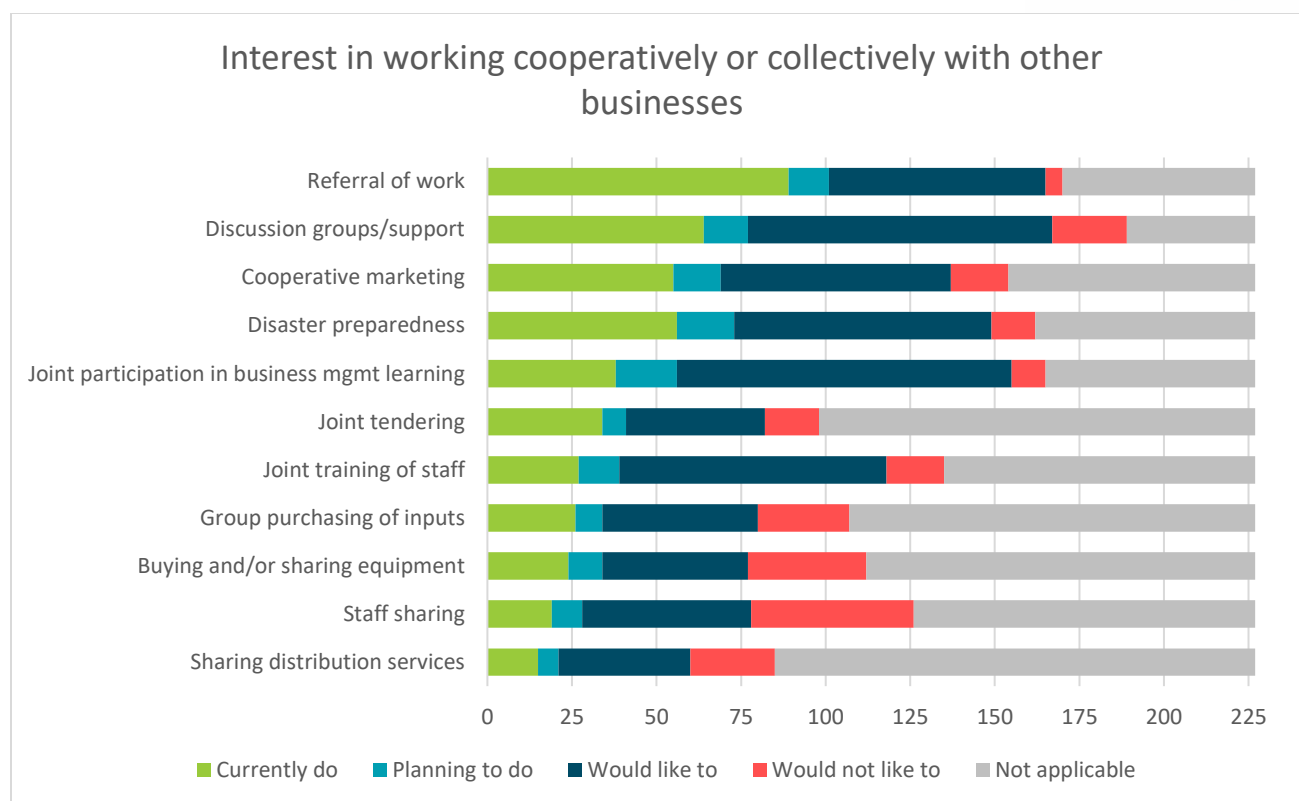
Survey question: *Please identify which local/State/Commonwealth Government or business development organisations you would like to be connected with for support*

Working together

Businesses were asked about cooperative or collaborative working with other businesses and whether they already do this or would like to. They were prompted with 11 options.

Businesses are already working well together on referral of work. Areas where businesses were planning to or interested in working together the most was in disaster preparedness, joint participation in business management learning, discussion groups/support and joint training of staff.





Survey question: *Do you or would you like to work in a cooperative or collective way with other businesses?*

Other ways respondents would like to engage with and work together with other businesses was in joint tendering for major infrastructure projects, grant partnerships, distribution/freight partnerships, cross promotion of local products, shared HR & Finance resources.

Survey question: *Are there any other cooperative or collective ways you would like to engage with other businesses?*

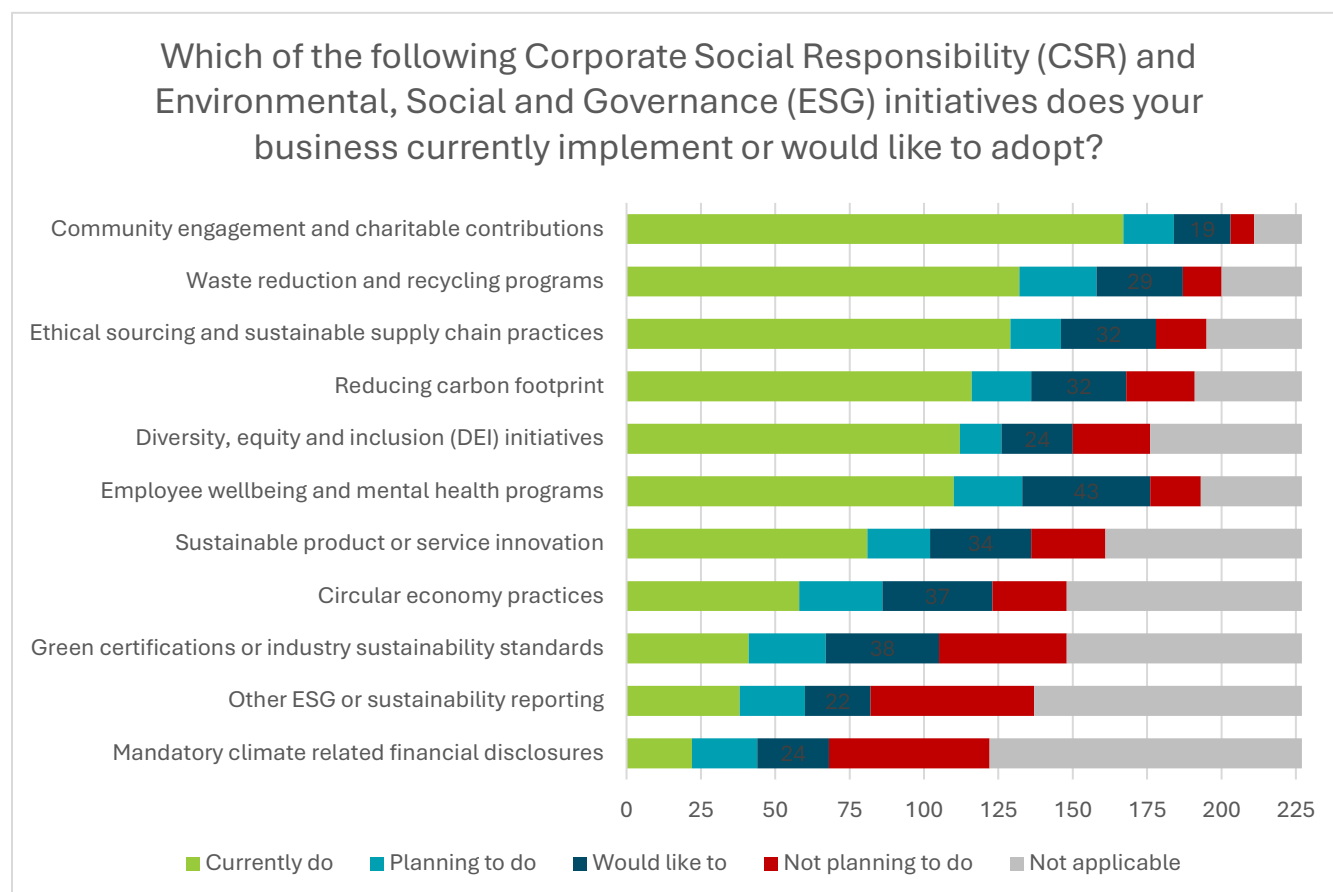
4.2 CSR & ESG

Respondents were asked about what Corporate Social Responsibility (CSR) and Environmental, Social and Governance (ESG) initiatives they currently do or are planning to do within their business.

There is a high level of values-driven intent among businesses but most businesses are engaged in practical, operational ESG actions, rather than formalised reporting or compliance-driven frameworks. Common environmental initiatives currently in place or desired include reducing waste and recycling, ethical and sustainable sourcing, and adopting more sustainable or regenerative practices where feasible. Social initiatives are strongly represented with majority of businesses conducting community engagement and



charitable contributions and a strong focus on employee wellbeing and mental health and DEI initiatives. Ethical and sustainable sourcing was also very important to respondents.



Survey question: What of the following Corporate Social Responsibility (CSR) and Environmental, Social and Governance (ESG) initiatives does your business implement or would like to adopt?

ESG by Sector

Across the data and looking by sector, environmental actions are the most consistent and mature, while social initiatives vary more depending on workforce pressure.

- **Construction, Manufacturing, Agriculture and Energy-related sectors** show the strongest focus on environmental ESG. This includes solar and battery installation, energy efficiency, waste reduction, ethical sourcing, and strong emphasis on disaster preparedness. These sectors are highly exposed to energy costs, floods, freight and supply chain disruption, so ESG activity is closely tied to managing risk and protecting business continuity rather than formal ESG reporting.
- **Accommodation, Food Services and Tourism businesses** show a mix of environmental and social ESG, but with a stronger emphasis on people. Alongside



waste reduction and local sourcing, there is significant focus on staff wellbeing, flexible work, community contribution and local employment. These businesses also report the highest workforce pressure so there could be an opportunity to enhance their social initiatives.

- **Professional, Health, Education and Community Services sectors** tend to focus more on social ESG, employee wellbeing, inclusion, flexible work, community impact and governance, but are often constrained by skills shortages, housing availability and funding models. Environmental initiatives are present but typically secondary to workforce sustainability.

In summary, environmental ESG is strongest where cost, energy and climate risk are highest, while social ESG is strongest where people are the core input, but also where workforce constraints are most acute.

ESG Opportunities

The data suggests ESG could play a much bigger role in workforce attraction and retention, particularly if it is framed practically rather than as compliance.

- **Lifestyle, Values, Purpose** - First, the region has a strong lifestyle, values and purpose story, which already aligns well with ESG — sustainability, community connection, meaningful work and work-life balance. These strengths could be more deliberately used to attract workers who are motivated by purpose, flexibility and impact, especially younger workers, career-changers and professionals willing to trade some income for lifestyle.
- **Environmental ESG** - could be linked directly to skills development. For example, solar, energy efficiency, water treatment, waste reduction and land management initiatives all require skilled workers, yet these same skills are in short supply. Aligning ESG funding, training programs and apprenticeships could help businesses build the skills they need while advancing sustainability goals.
- **Social ESG** – there is an opportunity to improve housing, transport and training, not just within individual businesses but at a regional level. Many businesses want to do more for staff wellbeing and inclusion but simply cannot overcome housing costs, transport gaps or lack of training pipelines alone. Treating these issues as shared ESG priorities, rather than individual business problems, could unlock coordinated solutions that improve both workforce outcomes and long-term regional resilience.

Businesses are already implementing ESG in practical ways. The biggest opportunity now is to use ESG more deliberately to solve workforce and attraction challenges, not just environmental ones.

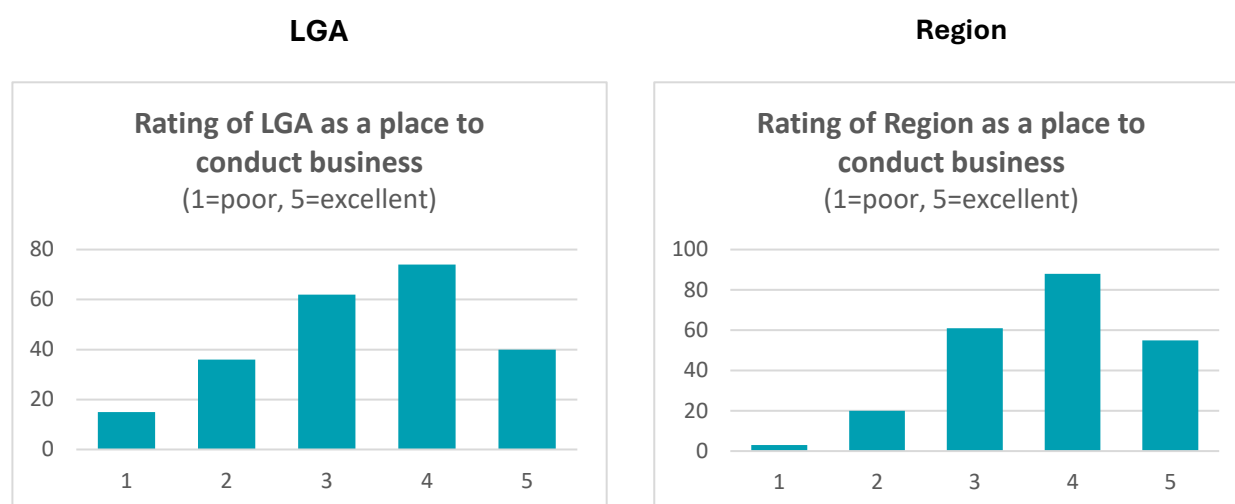


5. Local and Regional Business Environment

5.1 Business Environment

LGA & Region Rating

When we asked businesses to rate their LGA and region the results were mixed. The most ratings of 1/5 for LGA came from Lismore City Council businesses and the most ratings of 5/5 came from Ballina Shire and Clarence Valley businesses followed by Byron Shire.

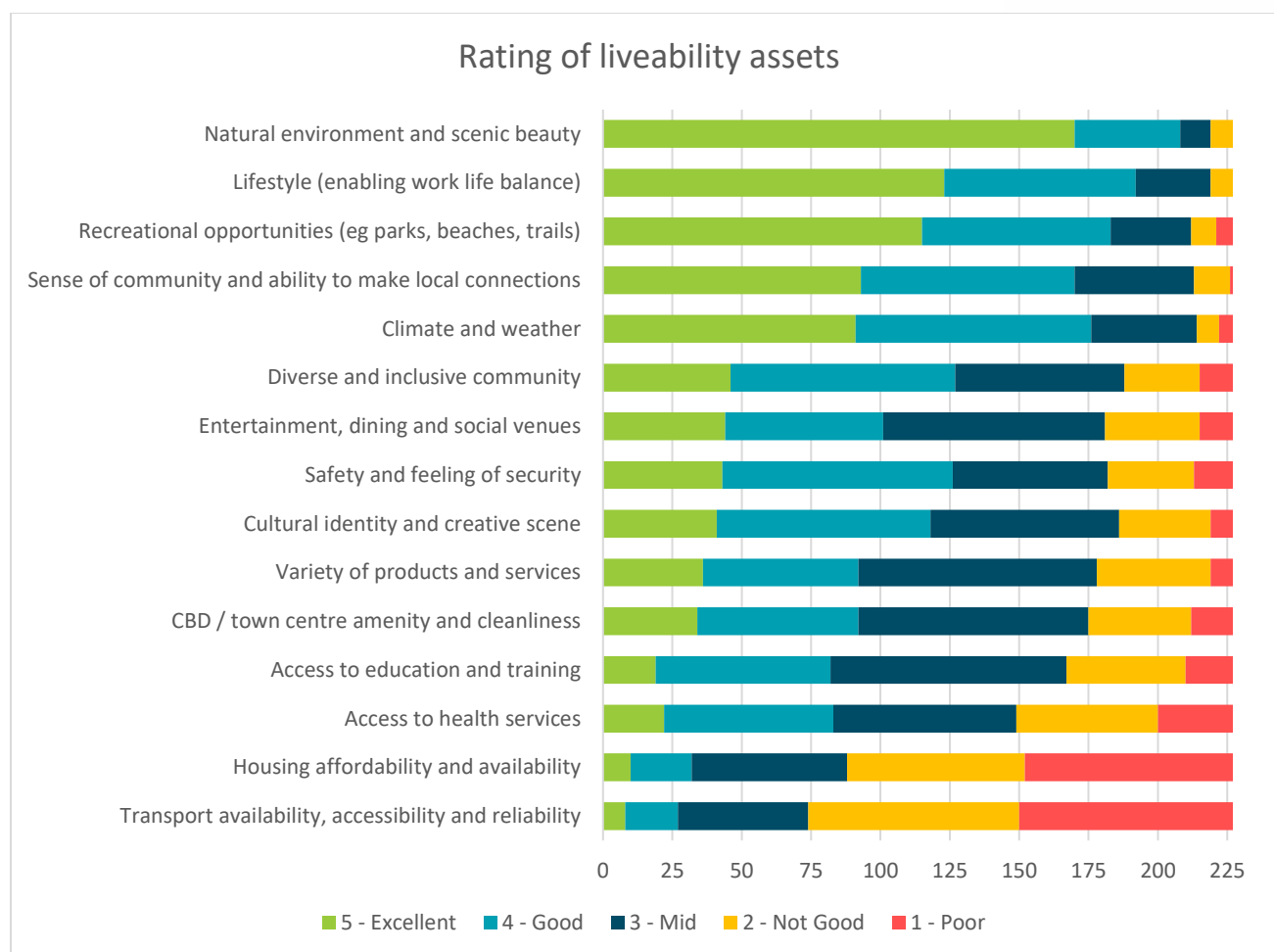


Survey question: What is your overall opinion of your LGA and the region as a place to conduct business (1 = poor, 5 = excellent)

Region's Liveability

Next businesses rated different liveability assets from 1 (poor) to 5 (excellent) in importance for a business location and to secure and maintain employees. The natural beauty and lifestyle options all scored the highest with the lowest being housing affordability/availability and transport.





Survey question: *Liveability can play an important part in choosing a business location and securing and retaining staff. How would you rate the following liveability assets in your LGA*

When asked about key differences between their LGA and the broader region there was a mix of positive and negative comments about their LGA. There were many mentions about increased crime and flood impacts still being very present in many areas.

Some comments are listed below:

- *“Byron Shire has very poor infrastructure and recreational opportunities outside of Byron Bay”*
- *“Regional Lismore has terrible public transport. Lismore CBD still carries the trauma of the floods. From a tourism POV visitors feel that Lismore is not a safe place.”*
- *“Regional roads in poor condition effect travel time to clients and wear and tear on vehicle - many local rd's still gravel.”*
- *“Lismore has no nightlife and poor coworking facilities.”*



- *“Ballina offers a more established retail environment, stable employment, & growing population. Continues to face challenges around housing affordability, increase pressures on housing, workforce attraction, & crime related incidents post- flood.”*
- *“Compared with some neighboring LGAs, there appear to be fewer community events, festivals, and activities (in Ballina Shire) that attract visitors and younger demographics into the area.”*
- *“Clarence Valley has some lovely, thriving high streets and towns. Across the broader region, neighbouring areas were hard hit by the flooding and businesses have not returned to the high street. The result is some pretty distressed areas frequented by pretty needy community members. Real need to have frontline services return to these locations”*
- *“Strong balance of lifestyle and accessibility (airport), and connectivity to SEQ. Region continues to benefit from ongoing council investment in public infrastructure, including high quality open spaces and recreational facilities (pump track, skatepark etc).”*
- *“I would like to be able to confidently promote Casino in particular as a well rounded community that welcomes and supports the arts as much as the sports.”*
- *“We are becoming a services hub is Lismore they should embrace this and also further develop Lismore becoming an educational and lifelong learning destination.”*
- *“Low socioeconomic, small populations with lack of large investment from private enterprises, local government &/or state government (Richmond Valley)”*
- *“The local council is more approachable than most (Richmond Valley)”*
- *“Our area differs from the broader Northern Rivers, particularly the coastal hubs, due to its high concentration of Rural Land Sharing communities and a strong focus on alternative, sustainable living. While the wider region is seeing rapid urban and commercial development, our part of the LGA remains dedicated to small-scale eco-tourism, habitat restoration, and niche agriculture. We also face unique challenges with aging rural infrastructure and lower connectivity, which requires a more self-reliant approach to business compared to the more serviced regional centers. (Nimbin)”*
- *“Byron Shire does not have a formal Destination Management Organisation and ...significantly under-invests in Destination Management, despite being one of the most popular tourist destinations in Australia. Destination Management ensures tourism is well-coordinated, sustainable, and mutually beneficial for both visitors and locals. ... through clear messaging, storytelling, and strategic positioning — Byron can attract travellers who value what Byron stands for and guide them into activities that the local community wants to see supported.”*
- *“There is currently very little for families and children to do in the region, especially since the floods. If it is 40 degrees or raining then families are often stuck for ideas that are practical. (Goonellabah, Lismore)”*
- *“Only a personal view: an observation that our area does not have a strong focus on the creative scene. (Casino, Richmond Valley)”*

Survey question: Are there any key differences between your LGA and the broader region?



Standout Feature of the Region

We asked businesses to tell us what they saw as a standout feature of living in the region that they would share with others considering establishing a business here. Below are some of their comments:

- *“uniquely balanced lifestyle – ocean and hinterland on your doorstep”*
- *“Proximity to major markets”*
- *“sense of community within the business community”*
- *“growing cultural and tourism profile – art, nature, food all drawing high value visitors”*
- *“unique balance of lifestyle, natural beauty, and strong community connection. For businesses, this creates a supportive environment with access to both local loyalty and a steady flow of visitors”*
- *“I feel that Tenterfield is unique, so attracting any small business that have something different to offer would be advantage for our town”*
- *“Inclusivity, proactive business support and networking organisations. Innovation and creativity.”*
- *“the deep community commitment to environmental stewardship and self-reliance”*

Survey question: *Is there a standout feature of living in the region that you would promote to others considering establishing a business here?*



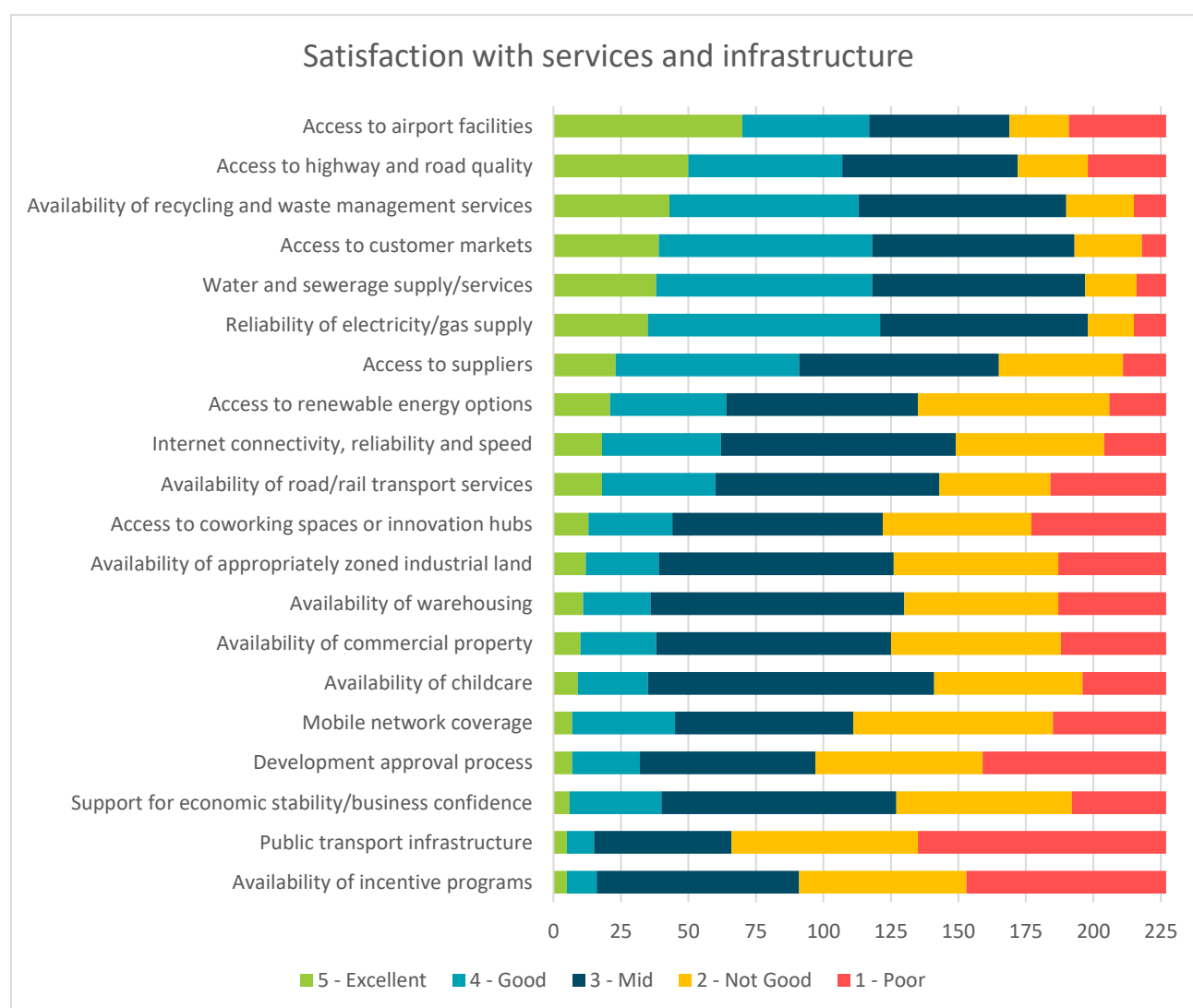
5.2 Services and Infrastructure

Satisfaction with Services and Infrastructure

We asked businesses to rate their level of satisfaction with different services and infrastructure in the area.

There was high satisfaction with access to airport facilities, access to highway, access to customer markets and generally services including waste, water and sewerage and reliable energy.

There was significantly lower satisfaction with public transport infrastructure, availability of incentives programs and development approval processes.



Survey question: *What is your level of satisfaction with each of the following services and infrastructure?*



Key Insights: Services and Infrastructure

Across the data, infrastructure issues are one of the strongest and most consistent constraints on business growth, workforce attraction and long-term resilience. The most frequently raised problems are transport and roads, housing availability, digital connectivity (internet and mobile), industrial land and flood-resilient infrastructure. These issues appear repeatedly across LGAs, but are most acute in flood-affected centres and hinterland locations, where businesses report being physically cut off, unable to expand, or unable to attract staff despite strong demand.

Transport, roads and access

Poor road quality, freight inefficiencies and limited public transport are raised across almost all LGAs, with particular emphasis in Lismore, Clarence Valley, Tweed hinterland and rural areas. For construction, manufacturing, agriculture and hospitality, unreliable roads and freight directly increase costs and reduce competitiveness. From a workforce perspective, limited public transport and long commute times narrow the local labour pool, especially for lower-paid or shift-based roles. This reinforces skills shortages already evident in hospitality, care, construction and trades.

Housing and industrial land

Housing affordability and availability emerge as a critical piece of infrastructure, not just a social issue. Many businesses explicitly link housing shortages to their inability to recruit or retain staff. This is particularly evident in Accommodation & Food Services, Health & Care, Construction and Professional Services, where businesses report turning down growth or relying on transient labour. At the same time, shortages of appropriately zoned industrial and commercial land, especially flood-free land, are constraining expansion in sectors such as construction, manufacturing, energy, professional services and logistics. Several LGAs are seen as prioritising residential development without sufficient employment land, creating a structural imbalance.

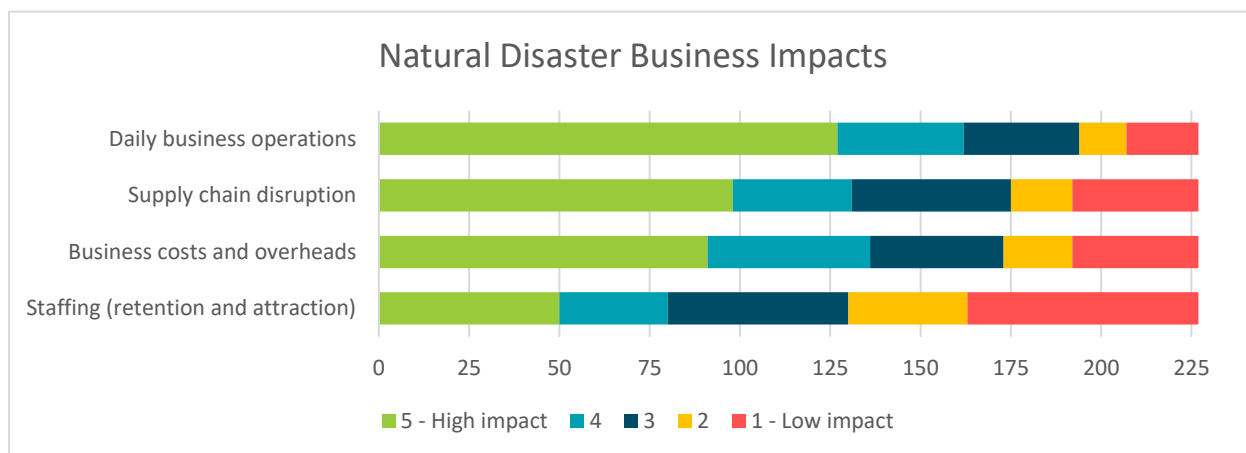
Digital infrastructure

Internet reliability, speed and mobile coverage are repeatedly identified as below business needs, particularly outside town centres. This cuts across nearly all sectors but is especially problematic for professional services, creative industries, technology-enabled businesses, health and education, and those seeking to offer flexible or remote work. Poor digital infrastructure undermines one of the region's biggest potential advantages — lifestyle-based attraction of skilled workers — and limits business resilience during disasters.



Natural Disaster Impacts

Respondents were asked about the impacts natural disasters had on their businesses. Daily operations were the most impacted followed by supply chain disruptions. Positively there was a large number of businesses who rated Staffing as having low impact during natural disasters.

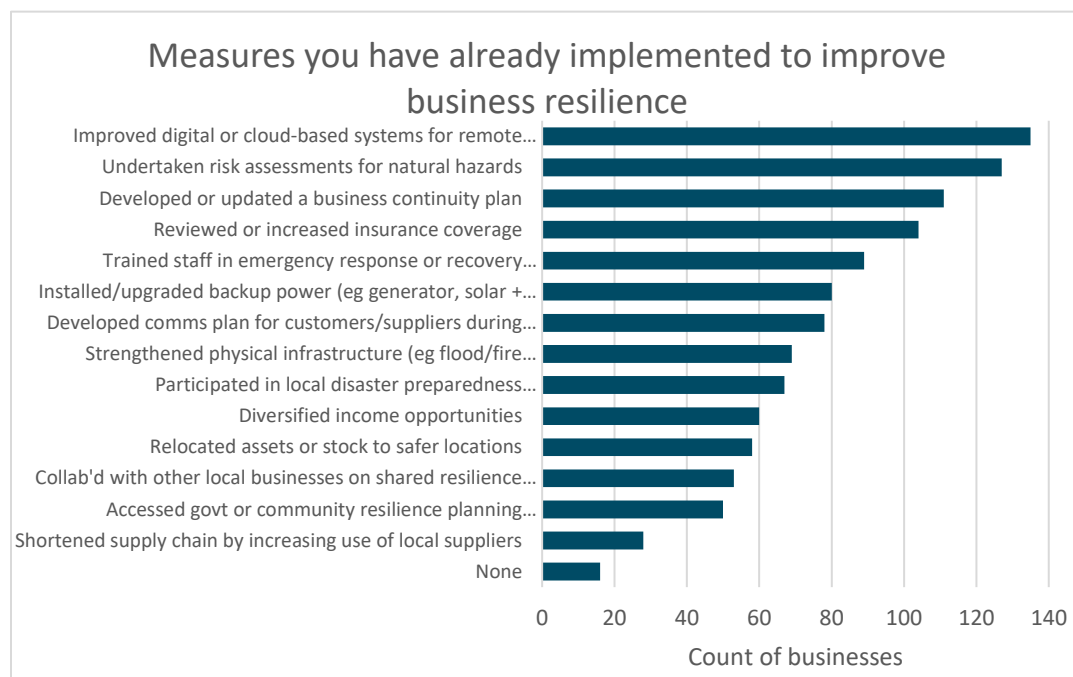


Survey question: *During a natural disaster, how would you rate the impacts your business experienced?*



Business Resilience

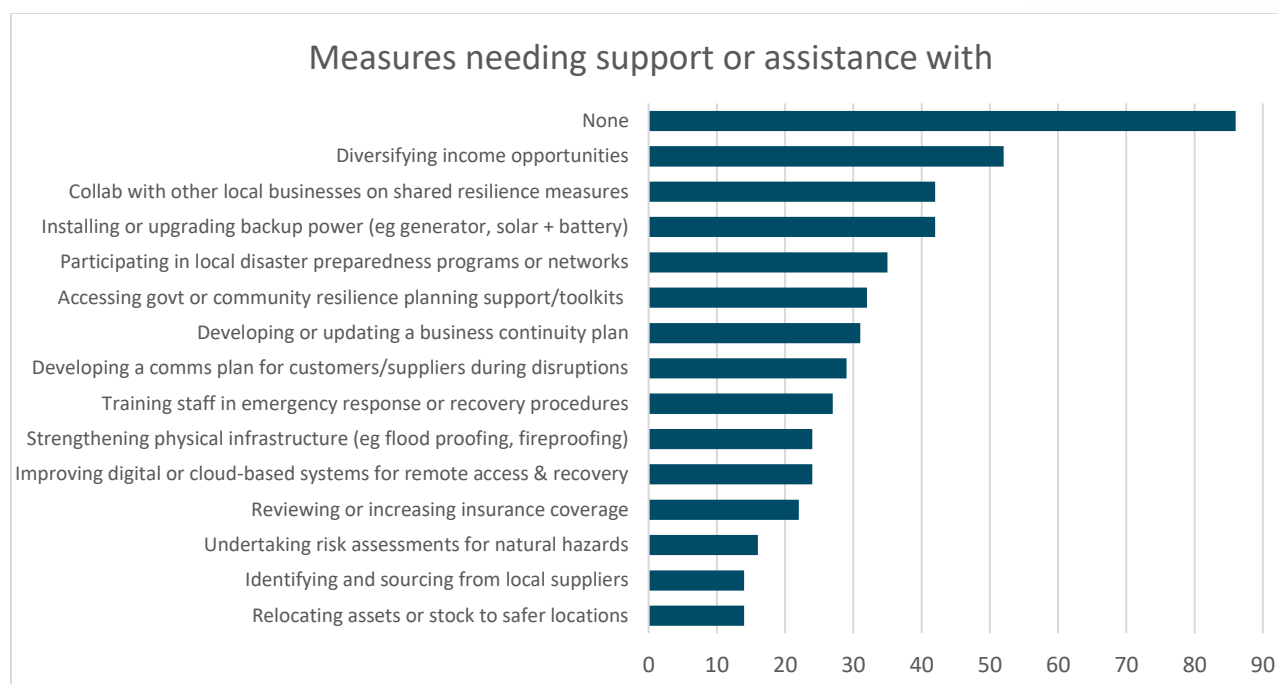
Businesses were asked to mark which business resilience measures they had already implemented within their businesses. The most commonly implemented measures were Improving digital or icloud systems to enable remote working, undertaken risk assessments for natural hazards and developed or updated a business continuity plan.



Survey question: Please indicate the measures you have already implemented to improve business resilience? (Select all that apply)

Respondents were then asked to mark which measures they need support or assistance with to improve businesses resilience within their businesses. The three most common responses were; diversifying income, collaborating with other businesses on shared resilience measures and installing or upgrading backup power systems (e.g. generator, solar and battery).





Survey question: Which measures do you need support or assistance with to improve your business resilience? (Select all that apply)

We asked businesses what they thought could be done to make the local economy stronger and create more local jobs. In summary it was heard that we must fix housing and flooding, remove red tape, support local businesses properly and give young people real reasons to stay, then the jobs will follow. More detailed responses are below:

- **Increased affordable housing** - housing is the biggest barrier on jobs and growth
 - "No housing = no workforce."
 - "Housing – the biggest economic brake on our business is that we need more people in the area, both as customers and as employees."
- **Flood mitigation and flood-free land**
 - "People are too scared to start a business only to be flooded again. We have no clear future flood plan."
 - "Fix flood mitigation and flood security measures for people to want to take a risk in the CBD again."
- **Reduced red tape and Councils better understand business realities**
 - "Remove a lot of red tape at council level. Have a complete overhaul of the tick department."
 - "Councils must be genuinely ready for business — with streamlined approvals, reduced red tape, and clear development pathways."
- **Support Small Business, Local Supply Chains and Local Procurement** - Local businesses see themselves as the backbone of the regional economy, but feel under-supported.



- *"You can't create enough of a positive vibe around local small business — they are the backbone of every community."*
- *"Local content being taken seriously with procurement and first contacts."*
- **Diversify the Economy Beyond Tourism, while also improving tourism quality** – many businesses warn against over-reliance on a weather-dependant sector. New industries are needed to stabilise employment. As well as events, conference and off-peak tourism.
 - *Tourism is very seasonal and weather dependent — it's very hard to keep staff all year round."*
 - *"Bring some new industries to the area."*
- **Invest in Skills, Young People and Workforce Pathways** - retaining young people and rebuilding skills pipelines is essential to long-term growth
 - *"Grow the ability to retain the young generations — they have to believe they will find meaningful employment here."*
 - *"There is a mismatch between the cost of living here and the wages offered."*

Survey question: *What do you think can be done to make the local economy stronger and to create more local jobs?*

We then asked respondents what they thought could be changed or introduced to position their LGA and/or the Region to attract greater investment. Responses were similar to the previous question and themes heard throughout the data. Businesses want certainty, speed and confidence; flood-free land, clear planning pathways, strong infrastructure, affordable housing, a skilled workforce and a region that knows who it is and communicates it clearly.

Expanded and themed commentary below:

- **Removing red tape and making planning easier** – businesses want faster and more transparent DA processes. reduced fees and proportionate planning costs, a clear “yes pathway” for priority industries, Councils shifting from regulator to facilitator
 - *"Proof of tangible outcomes, speedy decisions, less red tape."*
 - *"Planning certainty and speed."*
 - *"State planning regulations need a complete overhaul — planning costs completely derail local expansion."*
 - *"Businesses need to feel they are 'wanted' in the region."*
- **Flood-free industrial and employment land is essential** – businesses want more suitably zoned, development-ready employment land, industrial precincts outside flood zones, clear long-term land supply planning to show commitment
 - *"More suitably zoned flood free employment land."*
 - *"Certainty of development approvals on industrial land."*
- **Infrastructure and resilience drive business confidence** - businesses repeatedly link infrastructure quality with credibility and confidence in the region. They want flood



mitigation works that are funded and delivered, better roads, transport links and freight access, high-speed, reliable internet and mobile coverage, energy security and climate-resilient infrastructure.

- *"Actual and meaningful investment in flood mitigation is critical to restoring investor confidence."*
- *"Bridge the gap between high-value natural assets and aging infrastructure."*
- **Clear regional identity and stronger place branding are needed** – many respondents say the region knows who it is internally, but fails to communicate that externally. Businesses want a clear regional value proposition, unified branding beyond "just Byron Bay", stronger storytelling around existing successful businesses, destination and investment marketing working together.
 - *"We know what we're about, but that isn't always obvious to someone looking in from the outside."*
 - *"Understand who you are and develop a plan that can then be represented in town planning and policy decisions."*
- **Investment facilitation to make the region feel welcoming and easy** - there is strong support for hands-on investment attraction, not just promotion. Respondents are suggesting; a regional investment office or "one-stop shop", business concierge services, coordinated engagement across councils and agencies and clear points of contact for investors
 - *"Business concierge and welcoming."*
 - *"Be the leader in instigating the most seamless environment in opening and running a business."*
- **Workforce, housing and liveability are investment enablers** – businesses identify the importance of local infrastructure and services on workforce attraction and retention. Respondents mentioned more affordable and key-worker housing, better childcare, healthcare and transport and investment in skills pipelines aligned to growth sectors.
 - *"Address the housing issues!!!"*
 - *"Investors are watching the region's labour market and housing issues."*
- **Focus on anchor industries and values-aligned growth** – target investment aligned to regional strengths like; manufacturing and production, agri-food and regenerative industries, creative, film, music and screen, health, wellbeing and nature-based tourism, First Nations-led enterprise and knowledge and digital industries.
 - *"Attract manufacturing and production businesses."*
 - *"Position the region as a leader in regeneration, adaptation and resilience."*

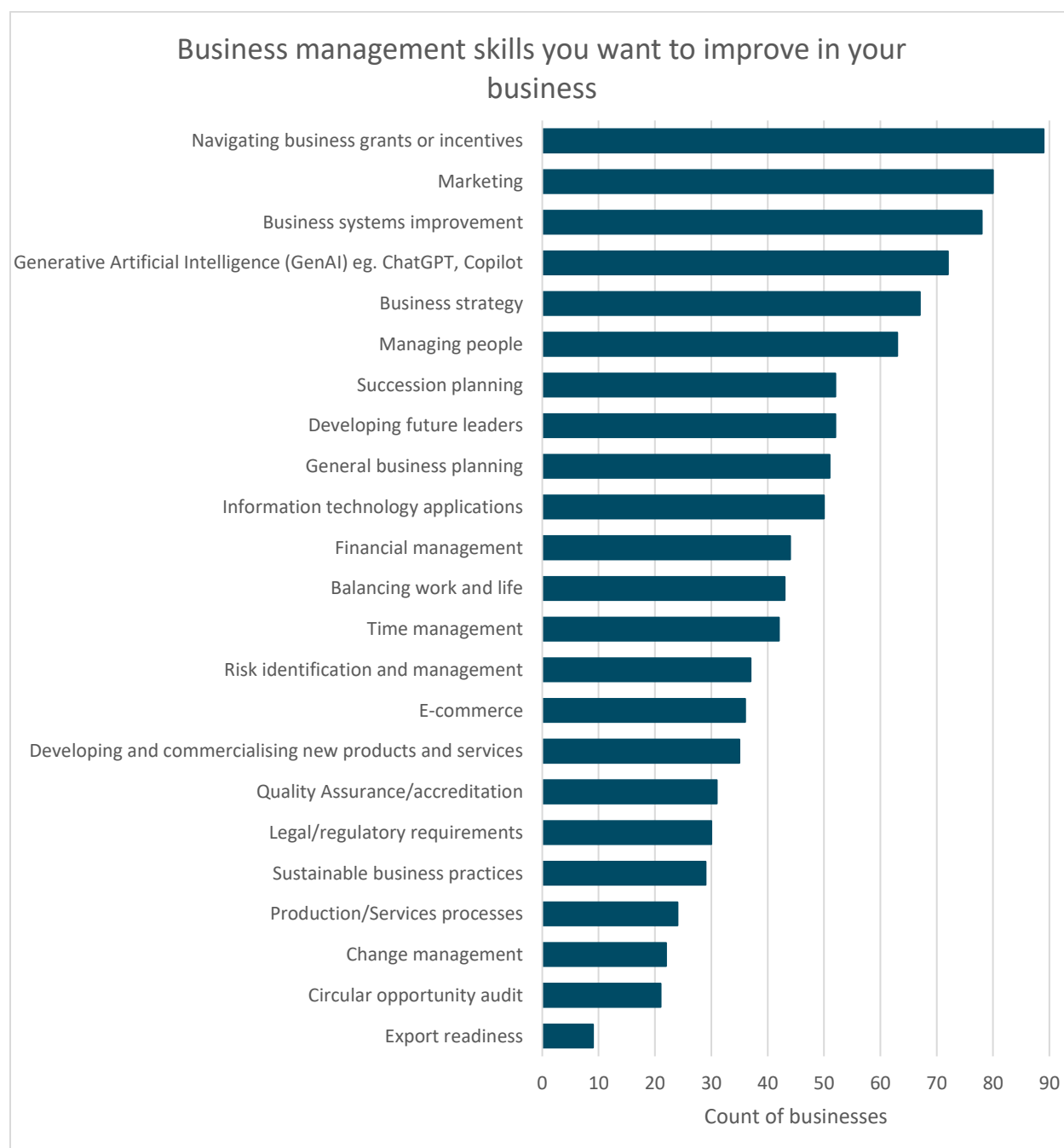
Survey question: *What do you think could be changed or introduced to position your LGA and/or the Region to attract greater investment?*



6. Business Support Services

6.1 Business Management Skills and Development

The top three areas where businesses require support is in navigating business grants or incentives, marketing and business strategy.



survey question: Which of the following business management skills would you or your staff like support in improving in your business?



Survey Overall Summary and Close

Across the survey, businesses consistently emphasise that the foundations for economic confidence are under strain, with **housing affordability and availability** emerging as the single largest constraint on growth. The lack of affordable homes and worker accommodation is directly undermining the region's ability to attract and retain staff, particularly in hospitality, health, construction, education and professional services.

This pressure is compounded by flooding and disaster recovery delays, high insurance costs, and infrastructure gaps, especially in transport, digital connectivity, flood mitigation and industrial land supply.

Businesses value the region's lifestyle, natural beauty and strong sense of community, but are clear that these strengths are not enough on their own to sustain growth without essential services, resilience and workforce capacity keeping pace.

At the same time, the survey reveals a strong appetite to invest, expand and innovate, provided key barriers are addressed. Businesses repeatedly call for streamlined and predictable planning and approvals, reduced red tape, clearer long-term regional vision, and more business-friendly council engagement.

There is broad support for targeted investment incentives, stronger regional branding, coordinated tourism and events strategies, and deeper collaboration across LGAs, industry groups and training providers. Workforce development, local supply chains, digital capability and disaster preparedness are seen as critical enablers of future growth.

Overall, the message is clear: the region has the talent, ideas and motivation to grow, but unlocking this potential requires coordinated action on housing, infrastructure, planning reform and skills, to restore confidence and make the Northern Rivers a place where businesses can invest with certainty and plan for the long term.

