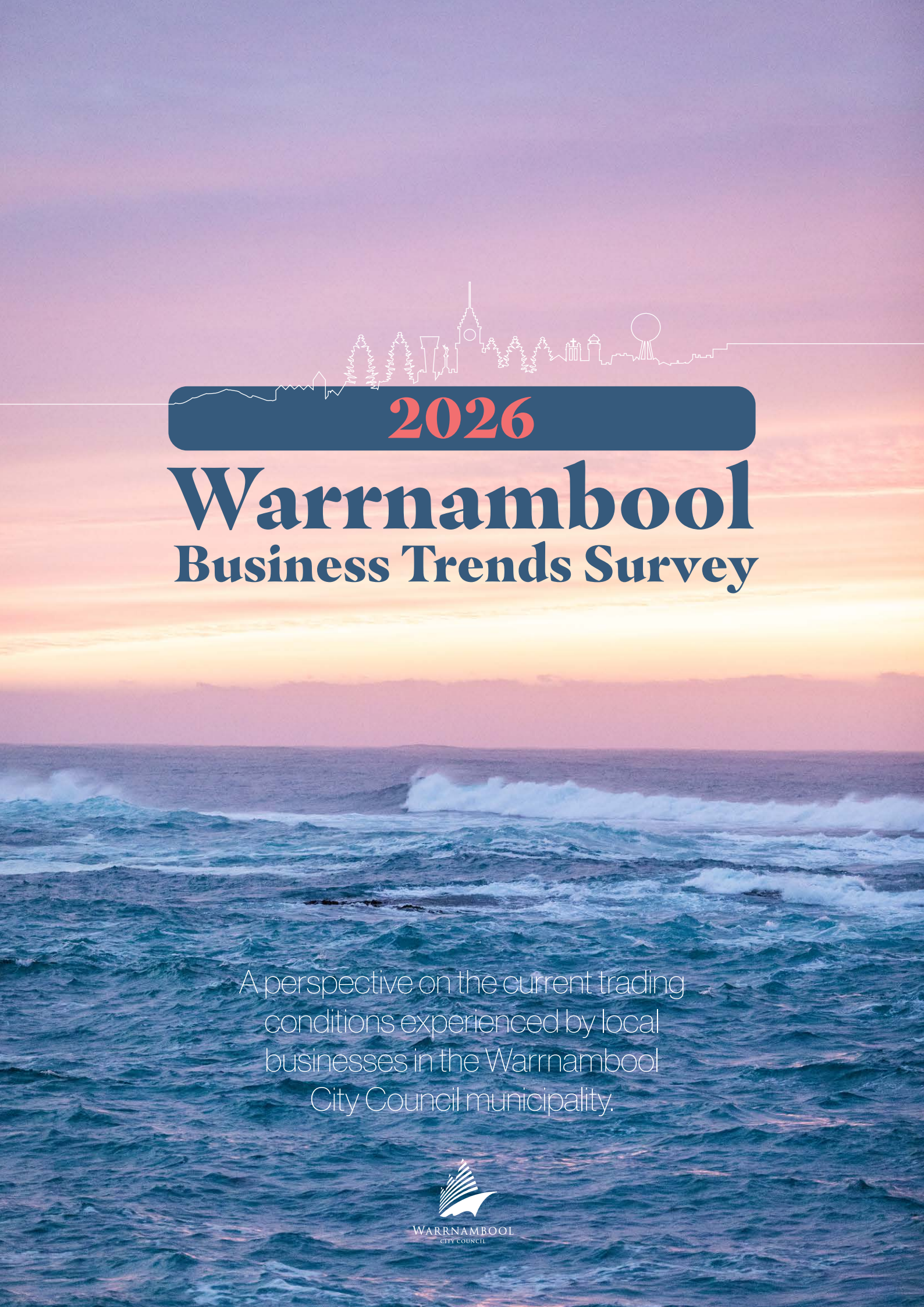


2026 Warrnambool Business Trends Survey

A perspective on the current trading conditions experienced by local businesses in the Warrnambool City Council municipality.

WARRNAMBOOL
CITY COUNCIL

At a glance

Industry sector responses Top 3

Retail Trade: 24.5%

Accommodation, Hospitality and Food/Beverage Services: 17%

Health Care and Social Assistance: 8.5%

Survey Responses: 200

Size of Business Responses Top 3

One
Fewer than 5 employees:
28.42%

Two
5 – 10 employees:
22.11%

Three
Sole operator:
19.47%

Top 3 Business Growth Assistance Initiative Picks

One
Local Grant Programs:
40.36%

Two
Regular Networking Events:
34.34%

Three
Warrnambool Business Representative Group:
24.10%

Business Location

Warrnambool CBD
49.5%

Business Confidence Levels



High to Very High:
19.88%

Medium:
44.58%

Low to Very Low:
31.32%

Uncertain
4.22%

Years in Business Operation



10 years or more: 61.05%

Business Financial Position Now vs 12 months ago



Same or Better Off:
60.55%

2024 v 2026
Business Survey

Positive Trending

- Increase of employees over past 12 months: up 2.96%
- Housing and Rental shortages for new staff: down 1.84%
- Better off financially than 12 months ago: up 8.34%
- Plans to invest in business over next 12 months (High to Very High): up 4.33%
- Generation of sales through the internet: up 9.25%
- Social Media improvements: up 7.03%

Negative Trending

- Barriers to taking on new employees (Superannuation): up 4.88%
- Barriers to taking on new employees (Changes/Regulations): up 10.48%
- Expectation to be worse off financially in 12 months' time: up 4.98%
- General website improvements: down 10.4%
- Very low confidence in Warrnambool's business environment: up 3.67%

2026 Key Findings & Trends

The 2026 Warrnambool Business Survey provides an important perspective on the current trading conditions experienced by local businesses in the municipality.

When considered alongside the 2022 and 2024 results, the data indicates that Warrnambool's business community has moved from the relatively strong confidence recorded in the post high-point of Covid-19 in 2022, through the significant deterioration evident in 2024, towards a partial stabilisation in 2026.

However, the 2026 results don't represent a full return to the conditions evident in 2022. The strongest continuing pressures are workforce availability and recruitment, operating costs, financial uncertainty and subdued business confidence. At the same time, digital adoption and external market activity continue to provide positive signs of resilience and adaptation.



The story emerging from 2026's Survey results:

1. Adaptation
Businesses are adapting through digital technology, online sales, social media and new workforce strategies.

2. Cost pressures
Rising business costs, profitability and cash flow are major constraints.

3. Workforce pressures
Finding appropriately skilled staff is arguably the single biggest operational challenge identified in the survey.

4. Cautious confidence
The business community isn't overwhelmingly pessimistic, but confidence is predominantly medium, with a sizeable low-confidence group.

5. A broader-than-local economy
More than half of responding businesses sell outside Warrnambool, with significant interstate and overseas activity.

Overall Assessment

Taken together, the 2022–2026 results suggest that Warrnambool's business community is stabilising following the highs and lows of recent years.

The 2024 survey represented a significant deterioration in financial conditions, confidence and employment expectations. The 2026 results show improvement in several areas, particularly financial position and digital activity, but the recovery is uneven.

The most significant ongoing challenges for local businesses uncovered by the 2026 survey are:

1. **Workforce recruitment and skills shortages**
2. **Increasing business and employment costs**
3. **Cash-flow and profitability pressures**
4. **Subdued business confidence**
5. **Cautious employment and investment intentions**
6. **Limited availability of some supplies within Warrnambool**

At the same time, several areas demonstrate resilience:

- Growth in online sales and digital capability
- Continued access to markets outside Warrnambool
- A substantial base of established businesses
- Continued demand for networking, grants and practical business support
- A gradual improvement in financial sentiment following the 2024 downturn

Overall, the 2026 survey suggests that Warrnambool businesses are adapting to a more challenging operating environment rather than retreating from growth opportunities. The strongest evidence of this adaptation is the continued expansion of digital capability and external market reach, while the principal impediments to further growth increasingly relate to workforce capacity, cost pressures and confidence in future demand.

The findings therefore point towards a business environment in which targeted support for workforce participation, skills, productivity, digital capability, local supply opportunities and practical business networking is likely to have the greatest relevance over the next two years.

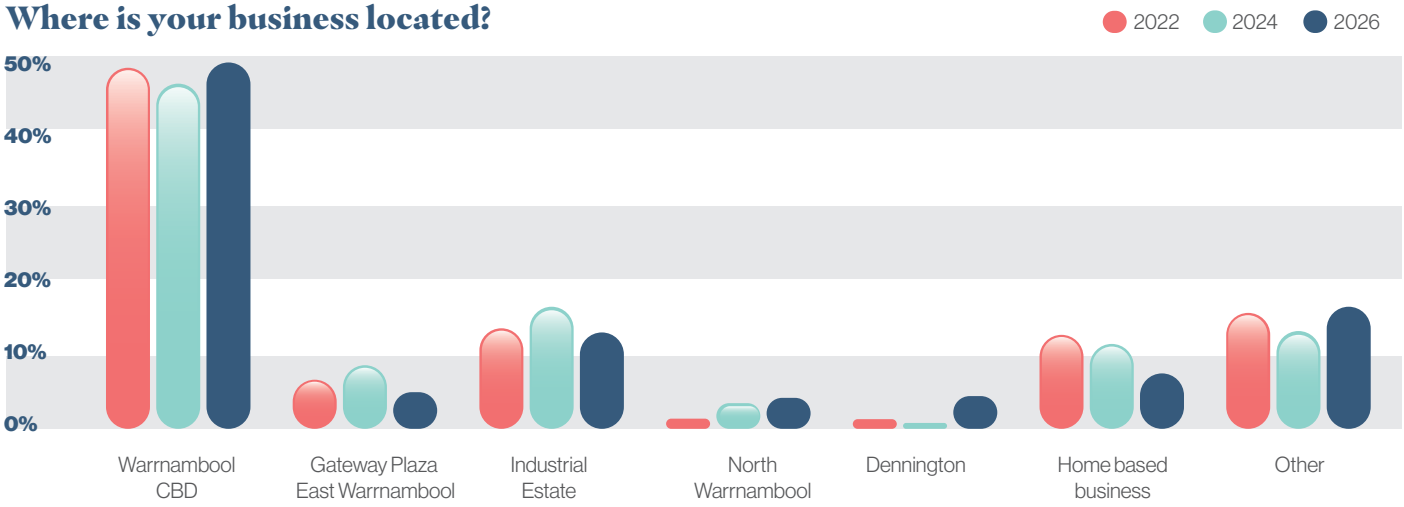
Industry Sector Results 2022, 2024 and 2026

Survey option	2022	2024	2026
Agriculture, forestry and fishing	7.10%	0.31%	1%
Mining	0.00%	0.62%	0%
Manufacturing	4.19%	5.90%	3.5%
Electricity, Gas, Water and Waste Services	0.32%	0.93%	1%
Construction	6.45%	5.90%	8%
Wholesale Trade	0.65%	2.17%	1.5%
Retail Trade	26.45%	25.47%	24.5%
Accommodation, Hospitality and Food/Beverage Services	12.90%	18.94%	17%
Transport, Postal and Warehousing	2.90%	1.55%	2%
Information Media and Telecommunications	1.29%	3.11%	2%
Banking and Insurance Services	1.94%	0.31%	3%
Rental, Hiring and Real Estate Services	1.61%	0.93%	4.5%
Professional, Scientific and Technical Services (inc. Accounting, Legal, Advertising etc)	4.19%	6.83%	5%
Administrative and Support Services	0.32%	0.93%	0%
Public Administration and Safety	0.65%	0.00%	0.5%
Education and Training	1.94%	2.48%	1.5%
Health Care and Social Assistance	10.65%	6.21%	8.5%
Arts and Recreation Services	2.26%	2.80%	4.5%
Other (inc. Automotive/Machinery/Clothing/Footwear repair and Maintenance, Hairdressing, Diet, Funeral, Laundry, Dry Cleaning, Religious Services and Professional Associations)	14.19%	14.60%	12%

2026 Industry Sector Raw Response Count

Answer Choices	Percentage	Responses
Agriculture, forestry and fishing	1%	2
Mining	0%	0
Manufacturing	3.50%	7
Electricity, Gas, Water and Waste Services	1%	2
Construction	8%	16
Wholesale Trade	1.50%	3
Retail Trade	24.50%	49
Accommodation, Hospitality and Food/Beverage Services	17%	34
Transport, Postal and Warehousing	2%	4
Information Media and Telecommunications	2%	4
Banking and Insurance Services	3%	6
Rental, Hiring and Real Estate Services	4.50%	9
Professional, Scientific and Technical Services (inc. Accounting, Legal, Advertising etc)	5%	10
Administrative and Support Services	0%	0
Public Administration and Safety	0.50%	1
Education and Training	1.50%	3
Health Care and Social Assistance	8.50%	17
Arts and Recreation Services	4.50%	9
Other	12%	24
Total		**200**

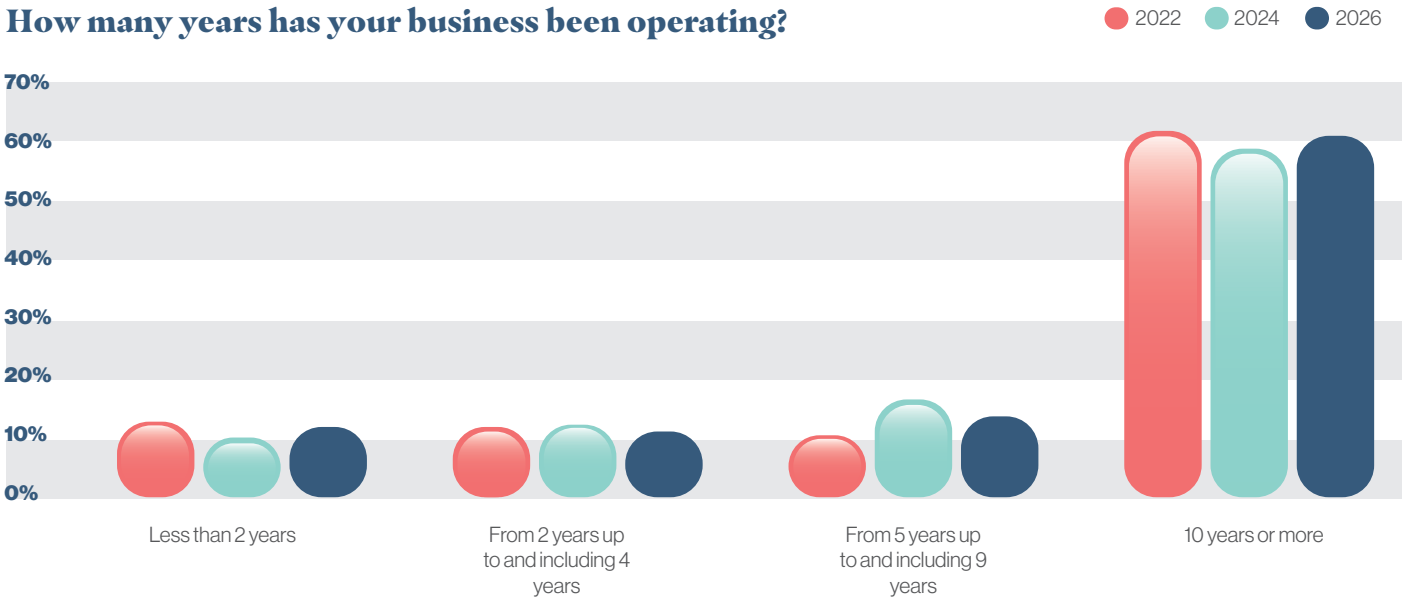
Where is your business located?







How many years has your business been operating?



What strategies will your business/organisation adopt to meet future skill needs (if any)?

Survey option	2022	2024	2026
Introduce new technologies	29.06%	29.76%	34.44%
Employ more apprentices and trainees	18.49%	13.49%	10.00%
Retain existing staff	56.60%	53.63%	54.44%
Employ skilled overseas workers	9.81%	7.27%	6.11%
Recruit experienced employees	30.19%	23.18%	23.33%
Reduce Staff turnover	13.58%	11.07%	13.33%
Employ people with basic technical skills and then re-train to requirement	13.96%	11.42%	13.89%
No action planned	17.74%	23.18%	24.44%
Engage with local job/training service providers	9.81%	8.65%	7.78%
Train and develop existing staff	0.00%	0.00%	0.00%
Other (please specify)	2.64%	3.46%	3.33%

Businesses continue to prioritise practical, direct forms of support

The preferred business-support initiatives have remained remarkably consistent across all three surveys.

Local grant programs remained the most selected initiative want:
44.50% (2022) ▶ 41.80% (2024) ▶ 40.36% (2026).

Regular networking events increased slightly:
33.03% ▶ 33.20% ▶ 34.34%.

Support for establishing a **Warrnambool business representative group** also increased to **24.10% in 2026**, compared with 22.02% in 2022 and 21.09% in 2024.

Business training workshops/mentoring remained important, although below its 2022 level:
27.98% ▶ 23.44% ▶ 23.49%.

The consistency of these preferences suggests that businesses continue to value **practical, accessible and immediately useful support**, particularly financial assistance, networking and opportunities to connect with other businesses.

Trend: Business support priorities have remained relatively stable despite changing economic conditions, with grants and networking continuing to dominate.

Which of the following initiatives/events do you believe will best assist your business grow and encourage overall growth of the Warrnambool business community?

Survey option	2022	2024	2026
Regular networking events	33.03%	33.20%	34.34%
Business Awards	16.97%	21.88%	15.66%
Formation of a Warrnambool business representative group (example 1, example 2)	22.02%	21.09%	24.10%
Support of business start-ups (e.g. business incubators/co-working spaces)	16.06%	19.14%	13.86%
Business training workshops/mentoring opportunities	27.98%	23.44%	23.49%
Business mentoring opportunities	0.00%	0.00%	0.00%
Local Grant programs	44.50%	41.80%	40.36%
Warrnambool centric marketing campaigns	0.00%	0.00%	0.00%
Placemaking Activities (e.g. laneway development/outdoor dining expansion program/street performance activation)	15.60%	20.31%	18.07%
Delivery of more business backed events	0.00%	0.00%	0.00%
Motivational/business speaking events	22.02%	18.75%	18.67%
Renewal/upgrade works	0.00%	0.00%	0.00%
Other (please specify)	20.64%	21.88%	20.48%

Are there any specific challenges, issues or barriers that you believe will hinder the growth of your business over the next 12 months?

Open-ended question; no fixed response choices.
2026: 106 responses answered; 94 skipped.

Ranked summary of recurring themes

Rank	Recurring theme	Overall strength
1	Cost of living & reduced consumer spending	Very strong
2	Rising business operating costs	Very strong
3	Staffing, skilled-worker availability & retention	Strong
4	Council, planning, regulation & red tape	Strong
5	CBD parking, accessibility, roadworks & traffic	Strong
6	Economic uncertainty & lack of business confidence	Strong
7	Tourism, visitor numbers & lack of attractions	Moderate/strong
8	Competition from larger/outside businesses	Moderate
9	Housing, commercial/industrial property & availability	Moderate
10	Government funding, taxation & policy	Moderate
11	Safety, crime, antisocial behaviour & CBD amenity	Moderate
12	Infrastructure, transport & connectivity	Moderate

Business Expectations and Confidence

The financial position of businesses shows a clear three-year cycle.

Businesses reporting that they were financially **better off** fell substantially from **33.21% in 2022 to 23.88% in 2024**, before recovering to **32.22% in 2026**.

Conversely, businesses reporting that they were **worse off** increased sharply from **20.75% in 2022 to 38.41% in 2024**, before declining to **33.33% in 2026.**

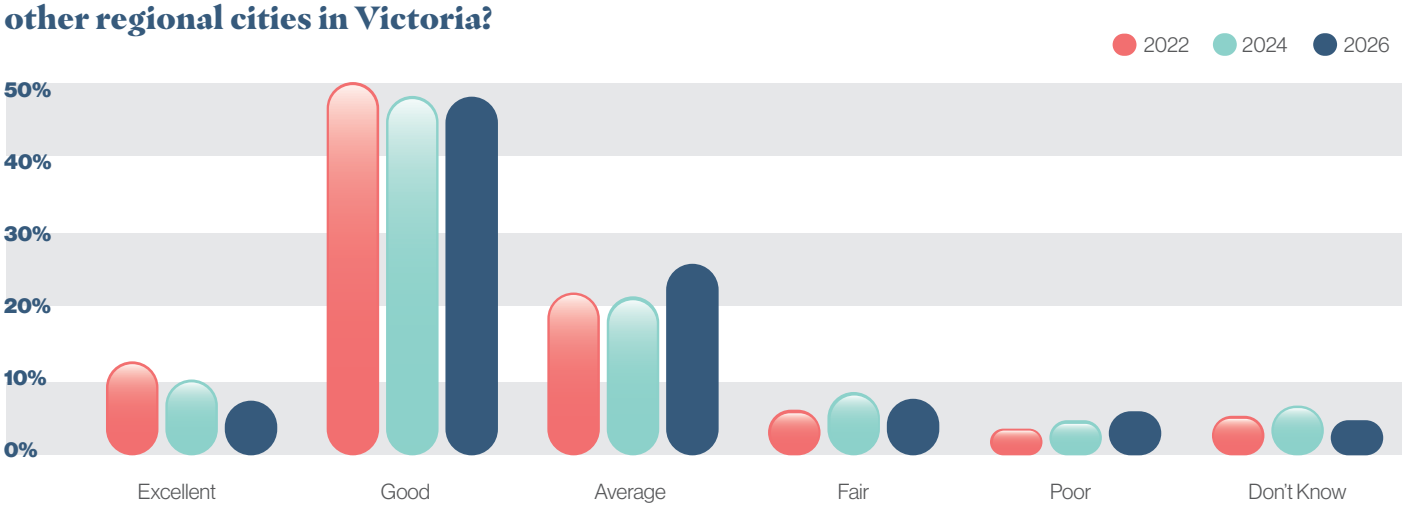
The 2026 result therefore represents a meaningful improvement on 2024, but the proportion of businesses worse off remains approximately **12.5 percentage points higher than in 2022.**

The forward outlook is more concerning. Businesses expecting to be **worse off financially in 12 months** increased progressively from:
9.81% (2022) ▶ 12.80% (2024) ▶ 17.78% (2026).

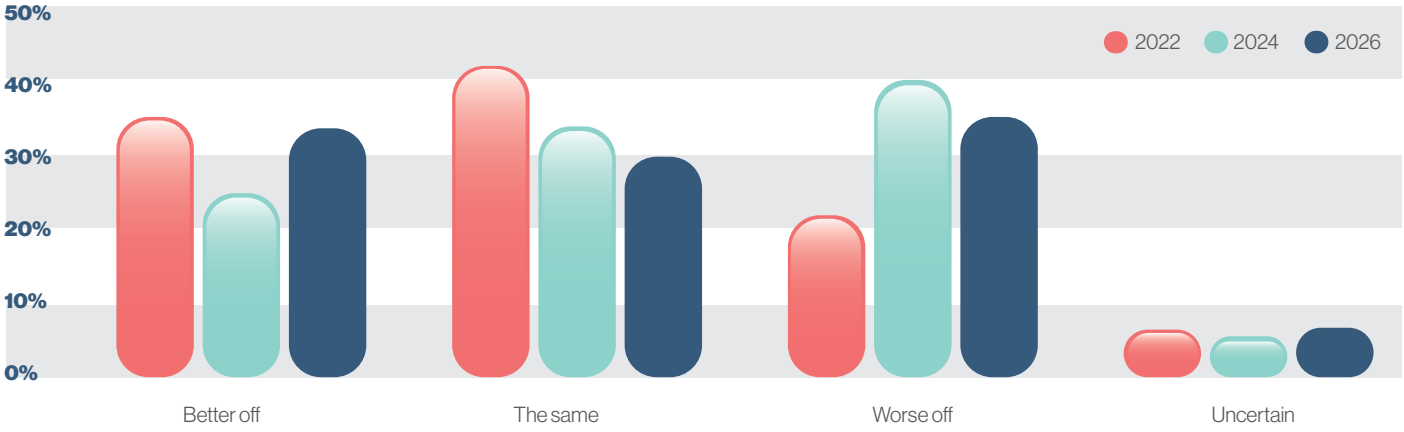
This is a significant warning indicator, suggesting that although current financial conditions have improved from the 2024 trough, businesses remain concerned about future operating conditions.

Trend: 2026 shows financial recovery from the 2024 downturn, but future financial expectations remain weaker than in 2022

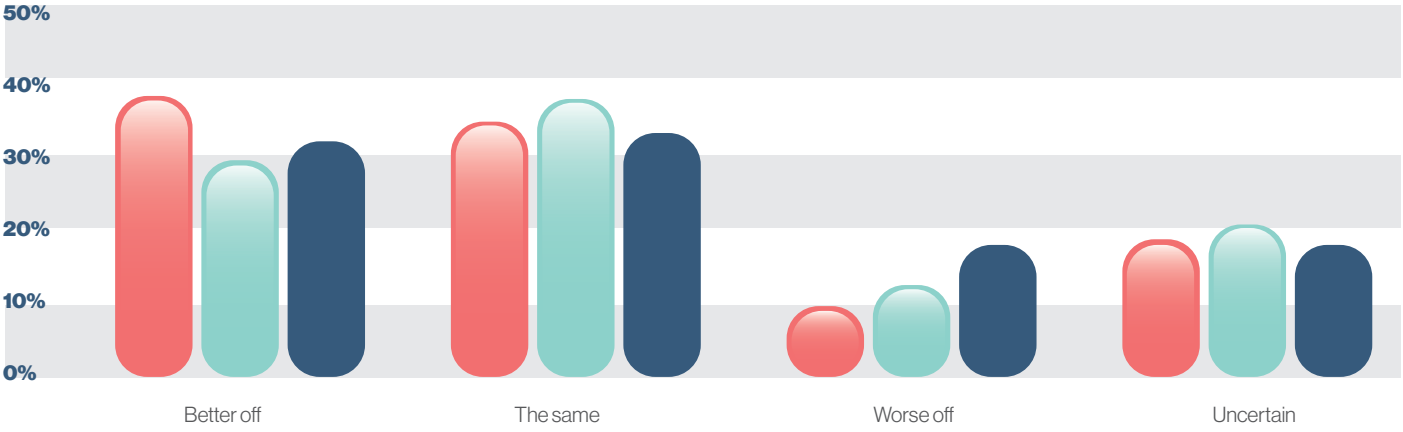
How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria?



Do you believe your business is better off financially than it was 12 months ago?



Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently?





Business confidence has stabilised, but hasn't returned to 2022 levels

Confidence in Warrnambool's business environment deteriorated significantly between 2022 and 2024 and has only partially recovered in 2026.

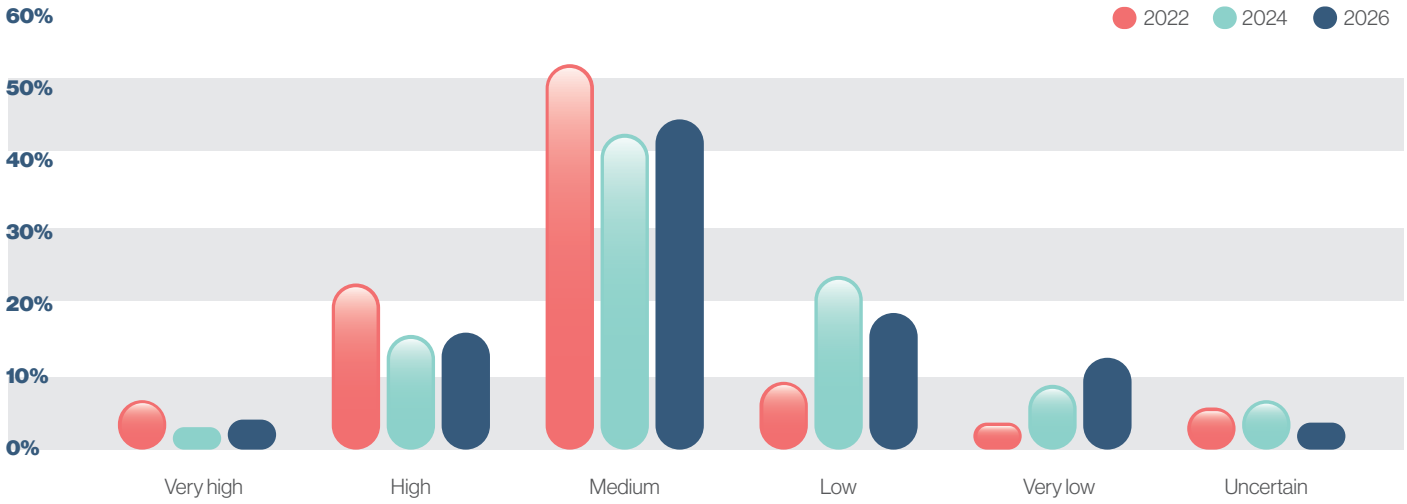
Businesses reporting **high or very high confidence** fell from approximately **29.36% in 2022 to 18.36% in 2024**, before increasing marginally to **19.88% in 2026.**

At the other end of the scale, businesses reporting **low or very low confidence** increased from approximately **12.84% in 2022 to 32.42% in 2024**, and remained elevated at approximately **31.23% in 2026.**

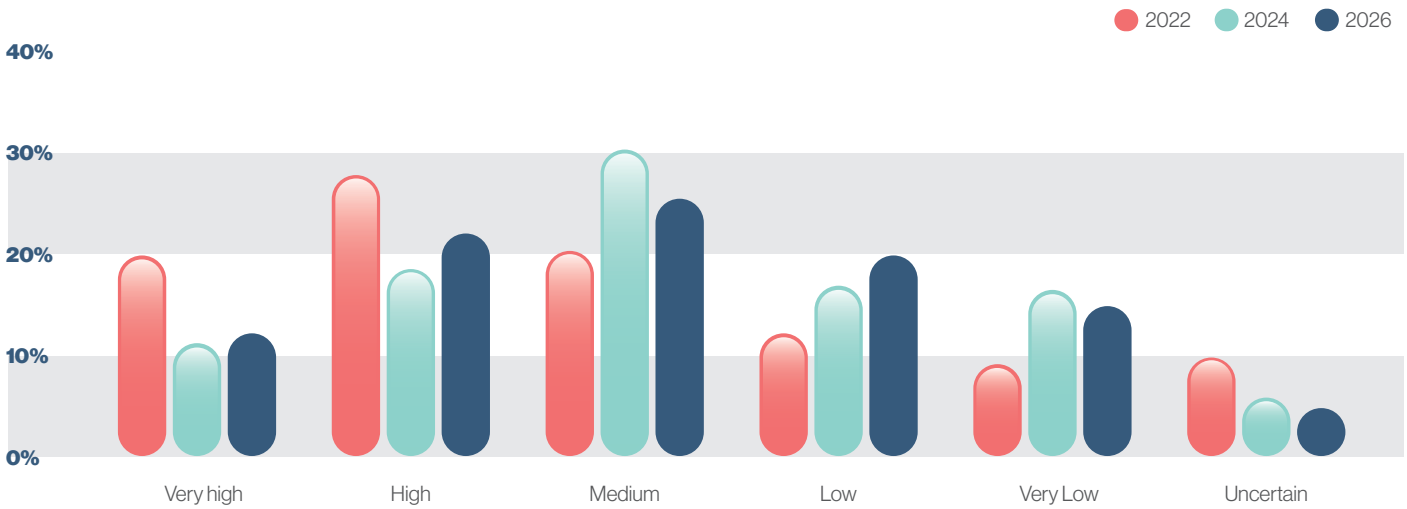
The largest single category in 2026 remains **medium confidence at 44.51%**, indicating that many businesses are neither strongly pessimistic nor strongly optimistic, but are adopting a cautious approach.

Trend: The sharp deterioration in confidence seen in 2024 has stabilised, but confidence remains considerably below the level recorded in 2022.

What is your confidence in Warrnambool's business environment (e.g. growth, business prospects and economic development) over the next twelve months?



How likely is it that you will invest (e.g. in building, people, assets and IT) in your business over the next 12 months?



Trade Outside of Warrnambool

The survey indicates that Warrnambool businesses continue to generate substantial economic activity outside the municipality.

The proportion of businesses selling outside Warrnambool was:
57.63% in 2022 ▶ 61.25% in 2024 ▶ 57.54% in 2026.

Although slightly below the 2024 peak, the 2026 figure remains broadly consistent with 2022.

The geographic reach of businesses has also evolved. In 2026, among businesses selling outside Warrnambool:

- **54.81%** sold into South West Victoria
- **40.38%** sold into the rest of Victoria
- **47.12%** sold into the rest of Australia
- **14.42%** sold overseas

The increase in sales reaching the **rest of Australia**, from 40.14% in 2022 to 47.12% in 2026, is particularly notable.

Trend: Warrnambool's business economy remains strongly connected to regional and national markets, providing an important source of economic resilience beyond local consumer demand.

Local supply-chain gaps remain a significant economic leakage issue

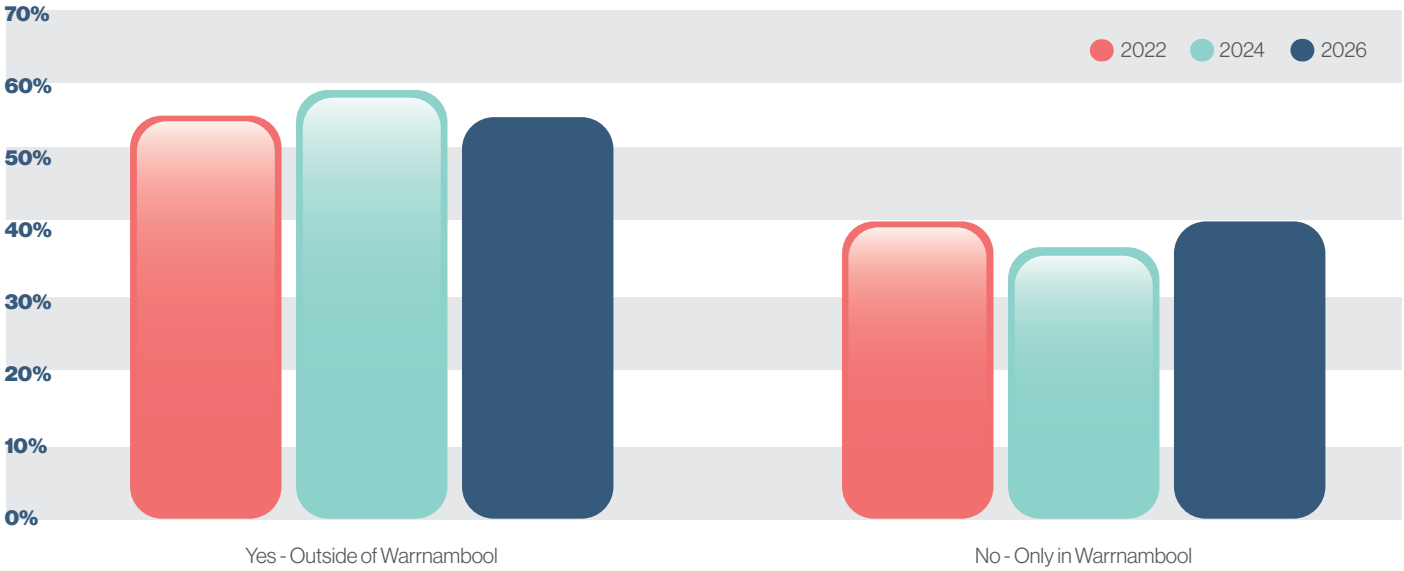
A notable 2026 finding is the extent to which businesses source goods and supplies from outside Warrnambool.

In 2026, **76.28%** of businesses responding to this question indicated that supplies they require are **not available in Warrnambool**. A further **48.08%** indicated that the nature of their business requires them to purchase directly from manufacturers, importers, wholesalers or brokers.

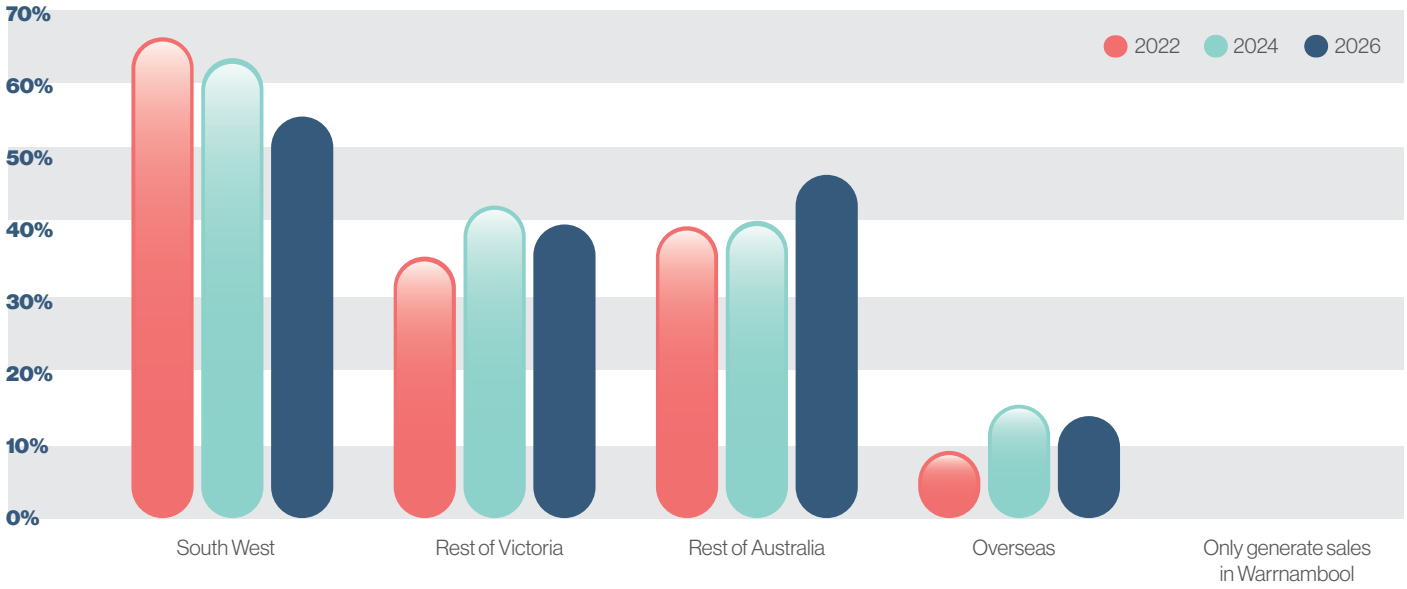
This represents a continuing opportunity for local economic development: where products or services could feasibly be supplied locally, reducing external purchasing could retain a greater proportion of business expenditure within Warrnambool and the surrounding region.

Trend: Supply-chain leakage remains substantial and points to opportunities for local business diversification, supplier development and stronger local procurement connections.

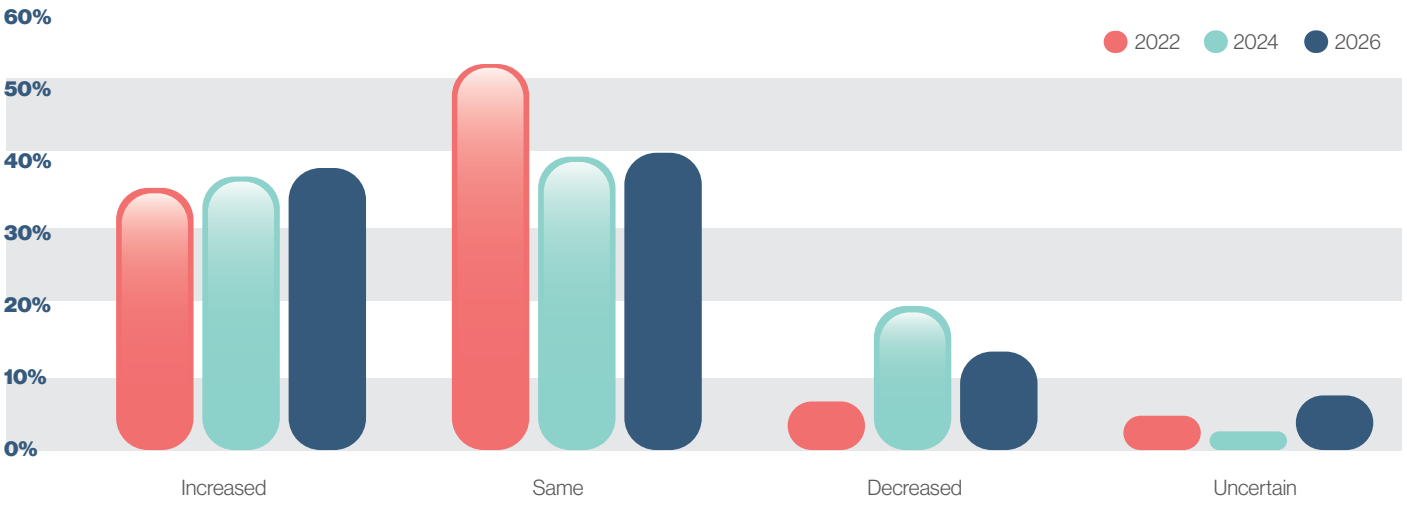
Does your business sell/export its goods or services outside of Warrnambool?



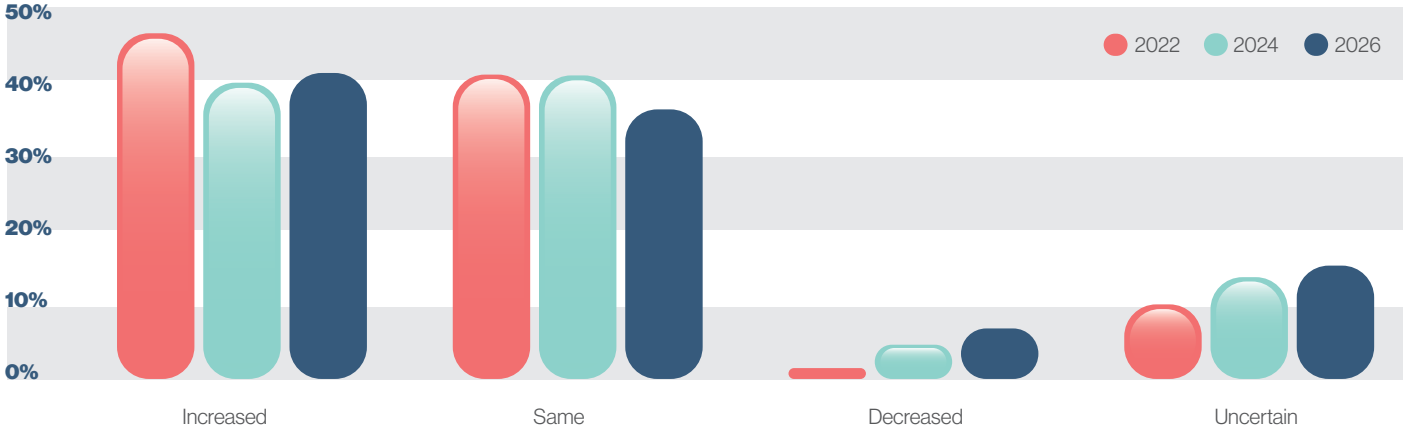
Where outside of Warrnambool does your business generate sales? (Tick all relevant boxes)



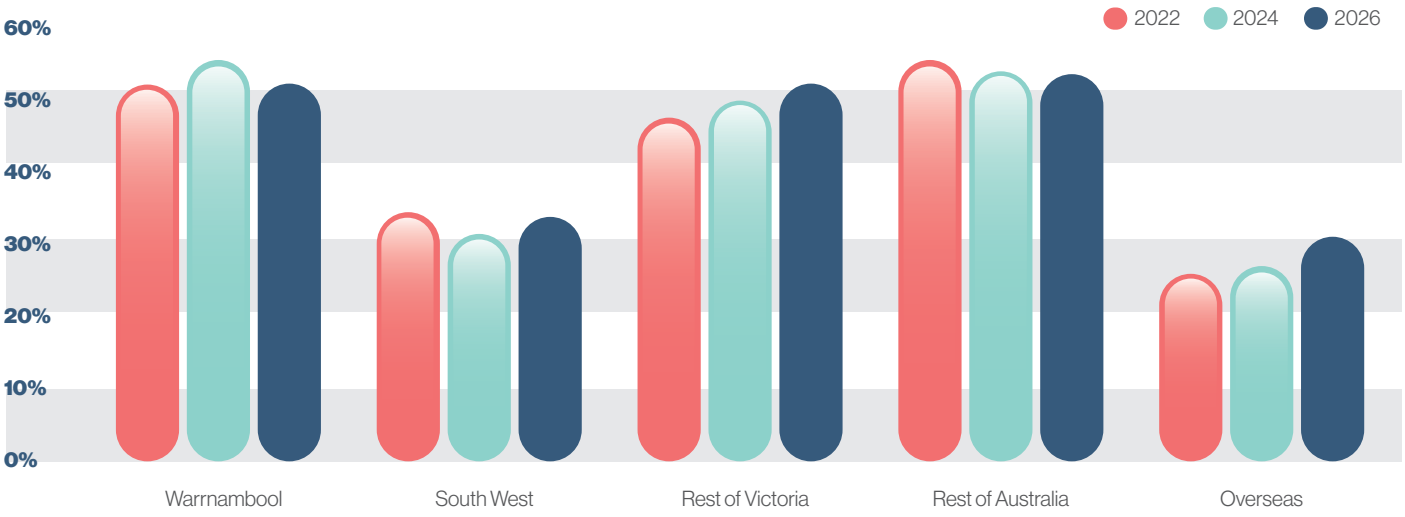
Looking back to the previous year, have your business's total exports (exports are any goods or services sold outside Warrnambool) increased, or decreased?



Looking forward to the forthcoming year, do you expect your business's total exports (exports are any goods or services sold outside Warrnambool) to increase or decrease?



Where are your business supplies/goods purchased from? (Tick all relevant boxes)



If supplies are purchased from other than Warrnambool and South West Victoria, what are the main reason/s for sourcing your supplies from elsewhere? (Tick more than one box if required)

Survey option	2022	2024	2026
Supplies are not available in Warrnambool	79.91%	76.35%	76.28%
The nature of my business requires me to purchase direct from manufacturer/importer/wholesaler/broker	51.40%	49.38%	48.08%
My business imports directly from overseas	5.61%	6.22%	9.62%
Price – supplies are too expensive in Warrnambool	15.42%	23.65%	17.31%
My business is part of a larger business or business group with its own purchasing program	15.89%	17.01%	17.31%





Digital adoption is one of the strongest positive trends

Digital business activity provides one of the clearest positive trends in the three-year comparison.

The proportion of businesses generating sales through the internet increased from:
57.37% in 2022 ▶ 55.36% in 2024 → ▶ 64.61% in 2026.

The 2026 result is therefore approximately **7.24 percentage points higher than 2022** and represents a substantial improvement following the slight decline in 2024.

Online capability investment has also continued to increase. Businesses reporting that they had improved their online presence and capabilities increased from **54.59% in 2022 to 59.38% in 2024 and 63.25% in 2026.**

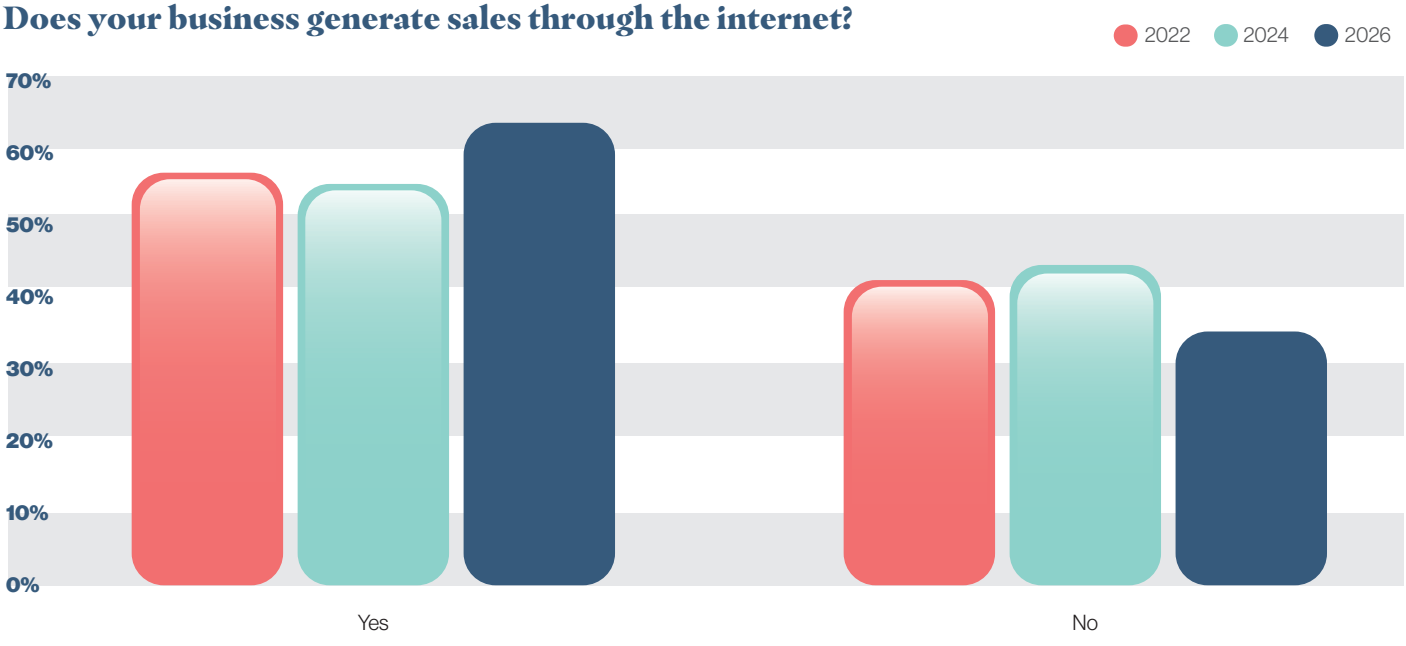
In 2026, the most common digital improvements were:

- **Social media growth – 67.29%**
- **General website improvements – 60.75%**
- **Online marketing – 41.12%**
- **New business website – 14.02%**
- **Online ordering – 14.02%**

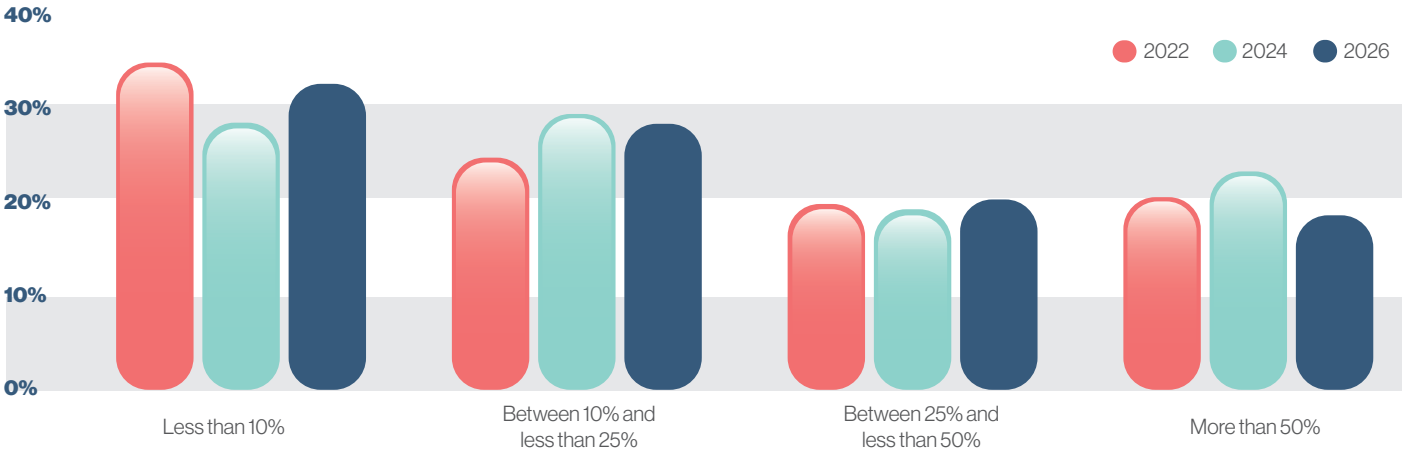
The data demonstrates that digital engagement is now an established component of Warrnambool's business environment rather than simply an emerging opportunity.

Trend: Digital adoption has strengthened steadily since 2022 and represents one of the clearest areas of business resilience and adaptation.

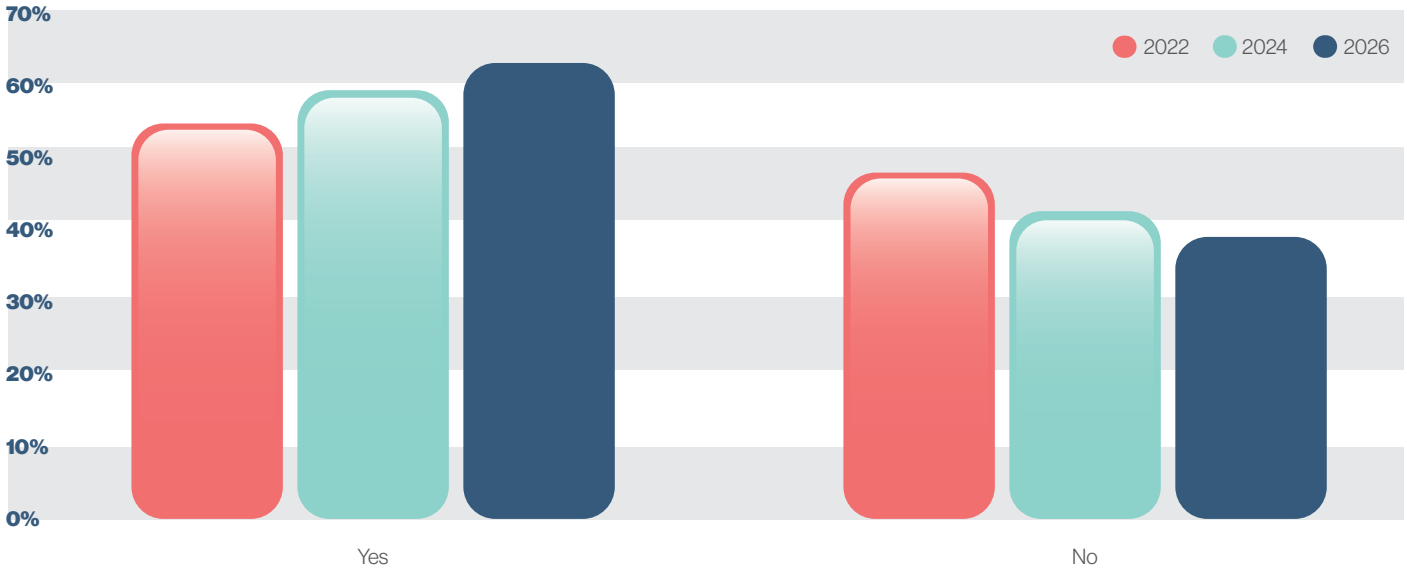
Does your business generate sales through the internet?



What percentage of your business sales are generated through the internet?



During the 2025/26 calendar years did your business increase/improve its online presence and capabilities? Eg; updating website, create online shopping options, online ordering?



What online improvements or capabilities did your business undertake in this period (Tick all that apply)

Survey option	2022	2024	2026
General website improvements	66.67%	71.15%	60.75%
Creation of an all new business website	21.67%	19.87%	14.02%
Development of an online store	16.67%	14.10%	6.54%
Online ordering system	13.33%	22.44%	14.02%
Business App development	0.83%	0.00%	0.00%
Social Media growth	65.00%	60.26%	67.29%
Online Marketing	43.33%	41.03%	41.12%
Other (please specify)	4.17%	3.21%	3.74%

Marketing your business

Considering marketing, what is your main advertising outlet? (Pick one only)

Survey option	2022	2024	2026
Radio	10.57%	10.73%	13.33%
Newspaper	2.26%	1.38%	0.00%
TV	1.29%	2.42%	1.67%
Social Media	45.28%	49.83%	48.89%
Cinema	0.00%	0.35%	0.00%
Digital (eg website, Google advertising)	20.75%	21.11%	19.44%
Other (please specify)	19.03%	14.19%	16.67%

Employment Trends

Workforce availability and the ability to recruit suitable employees have emerged as one of the most important issues across the three-year period.

The proportion of businesses reporting key barriers to taking on new employees increased from **61.72% in 2022 to 66.89% in 2024 and 67.89% in 2026.** The 2026 result therefore represents the highest level recorded across the three surveys.

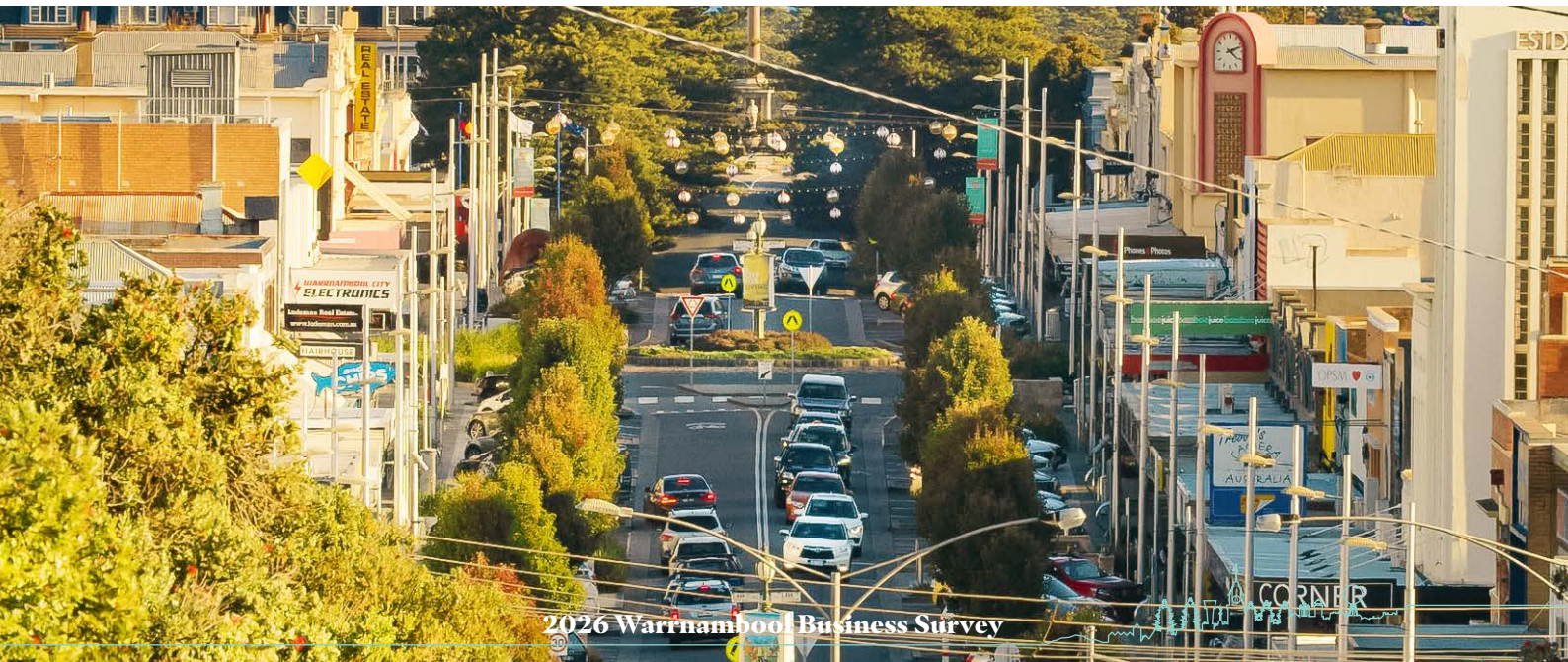
The nature of these barriers has also changed. In 2026, the leading barriers were:

- **Lack of skilled/qualified staff – 50%**
- **Increased business costs – 44.03%**
- **Cash-flow/profitability constraints – 36.57%**
- **Lack of work/sales – 23.88%**
- **Lack of confidence in the future – 20.15%**
- **Changes/regulations – 16.42%**

This indicates that recruitment difficulties are no longer simply a question of finding employees. Businesses are simultaneously confronting the availability of skilled workers, the cost of employing additional staff and uncertainty about whether future demand will justify expansion.

Employment expectations reinforce this cautious position. The proportion expecting employment to increase fell from **38.97% in 2022 to 27.87% in 2024,** recovering only slightly to **28.95% in 2026**. Meanwhile, the proportion expecting no change increased from **38.97% to 46.89% and then 53.16%.**

Trend: Employment growth has shifted from an expansionary outlook in 2022 to a predominantly holding pattern in 2026.



Rising business costs are increasingly influencing employment and business decisions

Cost pressures have become a more prominent feature of the survey over the three-year period.

Among businesses experiencing recruitment barriers, the proportion identifying increased business costs rose from **25.13% in 2022 to 41.10% in 2024 and 44.03% in 2026.**

Compared to 2022's survey, the percentage rise of businesses citing increased business costs as a major factor in their business decisions is a notable rise of 18.9%.

Similarly, **cash-flow/profitability constraints** increased from **25.13% in 2022 to 35.16% in 2024 and 36.57% in 2026.**

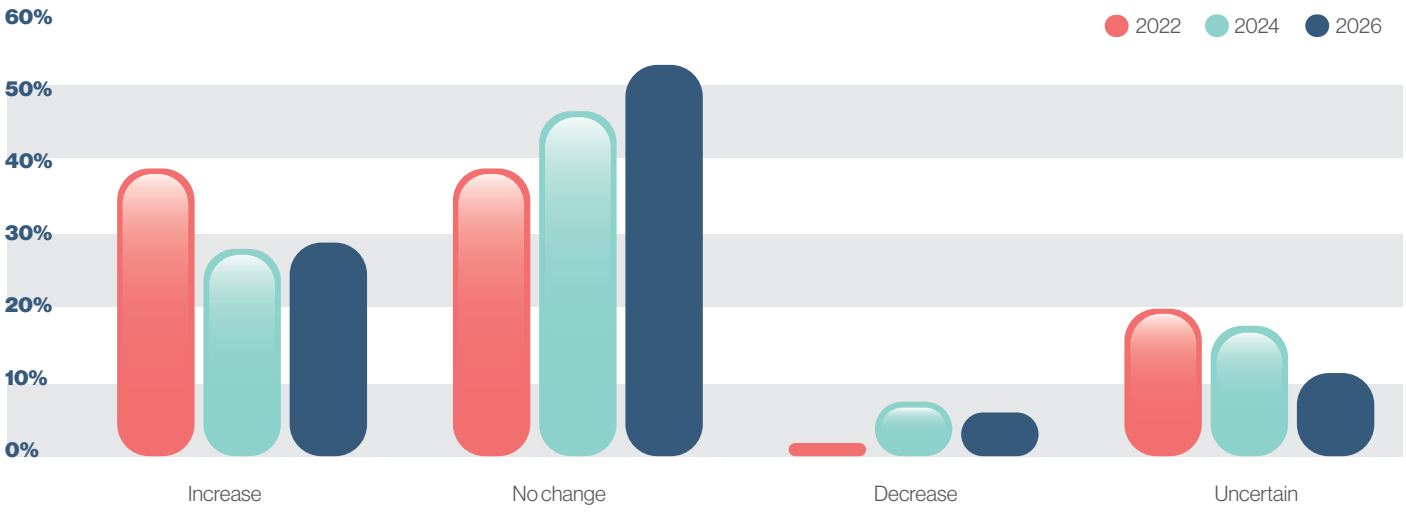
These results suggest that the challenge facing business expansion is increasingly a combination of **labour availability and affordability.** Even where businesses can identify opportunities for growth, the cost and financial risk associated with employing additional staff may be limiting their willingness or capacity to expand.

Trend: Cost pressures have shifted from being a significant concern in 2022 to a central constraint on business growth in 2026.

What is the size of your business in Warrnambool? (employment refers to all employees including full time, part time and casual)

Survey option	2022	2024	2026
Solo operator	22.07%	18.36%	19.47%
Employs fewer than 5 people	29.66%	26.89%	28.42%
Employs 5 - 10 people	26.21%	29.51%	22.11%
Employs between 10 - 19 people	10.34%	13.44%	18.95%
Employs between 20 - 49 people	6.90%	8.85%	8.95%
Employs between 50 - 99 people	3.10%	1.97%	0.53%
Employs between 100 - 199 people	0.34%	0.33%	0.53%
Employs more than 199	1.38%	0.66%	1.05%

Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool?



Are there key barriers to taking on new employees in your business?



What are the key barriers to taking on new employees at your business? (Maximum of 3 picks only)

Survey option	2022	2024	2026
Lack of work/sales	18.46%	29.22%	23.88%
Lack of skilled/ qualified staff	60.51%	54.34%	50.00%
Housing/Rental shortages	12.31%	10.05%	8.21%
Time to find staff	13.33%	10.50%	8.96%
Employment conditions	7.69%	9.59%	5.97%
Cash flow constraints, (profitability)	25.13%	35.16%	36.57%
Cost of training	13.85%	15.07%	11.19%
Business Closing	1.54%	1.37%	0.00%
Superannuation costs	7.18%	10.05%	14.93%
Changes/regulations	6.67%	5.94%	16.42%
Lack of confidence in future	7.18%	15.53%	20.15%
Increased Productivity due to technological advancement	2.56%	0.46%	0.75%
Decreasing of tourist numbers	6.67%	6.39%	6.72%
Increased business costs	25.13%	41.10%	44.03%
Other (Please detail)	13.85%	7.76%	14.18%





CBD & Non-CBD Sentiment 2026

What is your confidence in Warrnambool's business environment (e.g. growth, business prospects and economic development) over the next twelve months?

Survey option	CBD	Non-CBD
Very high	2.33%	6.25%
High	15.12%	16.25%
Medium	47.67%	41.25%
Low	22.09%	15%
Very low	10.47%	15%
Uncertain	2.33%	6.25%

Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool?

Survey option	CBD	Non-CBD
Increase	25.81%	31.96%
No change	59.14%	47.42%
Decrease	4.30%	8.25%
Uncertain	10.75%	12.37%

How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria?

Survey option	CBD	Non-CBD
Excellent	6.59%	8.99%
Good	52.75%	42.7%
Average	25.27%	25.84%
Fair	8.79%	6.74%
Poor	3.3%	8.99%
Don't Know	3.3%	6.74%

Do you believe your business is better off financially than it was 12 months ago?

Survey option	CBD	Non-CBD
Better off	32.97%	31.46%
The same	31.87%	24.72%
Worse off	28.57%	38.2%
Uncertain	6.59%	5.62%

Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently?

Survey option	CBD	Non-CBD
Better off	34.07%	29.21%
Same	37.36%	28.09%
Worse off	13.19%	22.47%
Uncertain	15.38%	20.22%





Retail Sector Sentiment 2026

What is your confidence in Warrnambool's business environment (e.g. growth, business prospects and economic development) over the next twelve months?

Survey option	Retail	All Other Sectors
Very high	6.98%	3.25%
High	13.95%	16.26%
Medium	34.88%	47.97%
Low	20.93%	17.89%
Very low	18.6%	10.57%
Uncertain	4.65%	4.07%

Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool?

Survey option	Retail	All Other Sectors
Increase	27.66%	29.37%
No change	51.06%	53.85%
Decrease	6.38%	6.29%
Uncertain	14.89%	10.49%

How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria?

Survey option	Retail	All Other Sectors
Excellent	11.11%	6.67%
Good	42.22%	49.63%
Average	33.33%	22.96%
Fair	8.89%	7.41%
Poor	2.22%	7.41%
Don't Know	2.22%	5.93%

Do you believe your business is better off financially than it was 12 months ago?

Survey option	Retail	All Other Sectors
Better off	31.11%	32.59%
The same	33.33%	26.67%
Worse off	31.11%	34.07%
Uncertain	4.44%	6.67%

Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently?

Survey option	Retail	All Other Sectors
Better off	28.89%	32.59%
Same	31.11%	33.33%
Worse off	20%	17.04%
Uncertain	20%	17.04%





Accommodation & Hospitality Sentiment 2026

What is your confidence in Warrnambool's business environment (e.g. growth, business prospects and economic development) over the next twelve months?

Survey option	Accom/ Hospitality	All Other Sectors
Very high	0%	5.19%
High	19.35%	14.81%
Medium	41.94%	45.19%
Low	19.35%	18.52%
Very low	16.13%	11.85%
Uncertain	3.23%	4.44%

Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool?

Survey option	Accom/ Hospitality	All Other Sectors
Increase	28.13%	29.11%
No change	59.38%	51.9%
Decrease	6.25%	6.33%
Uncertain	6.25%	12.66%

How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria?

Survey option	Accom/ Hospitality	All Other Sectors
Excellent	3.23%	8.72%
Good	38.71%	49.66%
Average	32.26%	24.16%
Fair	12.9%	6.71%
Poor	9.68%	5.37%
Don't Know	3.23%	5.37%

Do you believe your business is better off financially than it was 12 months ago?

Survey option	Accom/ Hospitality	All Other Sectors
Better off	32.26%	32.21%
The same	29.03%	28.19%
Worse off	32.26%	33.56%
Uncertain	6.45%	6.04%

Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently?

Survey option	Accom/ Hospitality	All Other Sectors
Better off	22.58%	33.56%
Same	38.71%	31.54%
Worse off	19.35%	17.45%
Uncertain	19.35%	17.45%



The 2026 Warrnambool Business Survey was designed and established by the Warrnambool City Council's Economic Development and Investment Unit.

Council wishes to thank local businesses for their support of the Survey in 2026.

The Warrnambool Business Survey is designed to track business sentiment and current issues facing Warrnambool-based businesses, with the data enabling Council to provide the most accurate and beneficial support to our business community.

Data was obtained by an online survey distributed to businesses in the Warrnambool City Council Local Government Area. Emails and distribution of the survey via DL flyers with QR codes linking to the online survey were provided to a majority of businesses with a commercial premises in the city. The Warrnambool City Council estimates there are approximately 3500 businesses in the municipality. The electronic survey was made available using Survey Monkey. It is estimated that the Economic Development Team visited between 500 - 600 businesses to promote the survey and encourage a cross sector of businesses to complete the survey.

The survey was constructed based on surveys from previous years. Questions deemed not relevant to the current Warrnambool situation were removed from the 2026 survey.

The survey invitations were distributed and available to all Warrnambool based businesses throughout the month of August 2026. The 2026 report is based on 200 responses received via the online survey*. No hardcopies of the survey were distributed to businesses with the survey conducted entirely online.

Data has been collected for this research since 2011 (In 2011, 2012, 2013, 2014, 2015, 2017, 2019, 2022 & 2024).

In some instances, rounding errors may be apparent. It is noted that there is inherent bias often present in self-selecting surveys and some groups might be disproportionately represented. Further, some proportions are represented by very few responses and again, results should be considered with caution

*200 respondents were activated on the survey. Of this number it is estimated that 166 answered all mandatory questions with 34 partially completing the survey to varying percentages.

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