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# RESET REPORT 3

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VISITOR ECONOMY RESILIENCE REPORT IN  
MELBOURNE'S WEST



MARCH 2022



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**Funding partner:**



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*We thank Gabrielle Lindsay-Smith for her involvement in this project in 2021.*

*Images are sourced from Canva and Western Melbourne Tourism Inc.*

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## ACRONYMS

- CALD Culturally and Linguistically Diverse
- CBD Central Business District (Melbourne)
- LGA Local Government Authority
- RESET Resilient Enterprises and Sustainable Employment in Tourism
- WHO World Health Organization



## DEFINITIONS

- Micro business: business with less than 5 employees
- Small business: business with 5-19 employees
- Medium business: business with 20-199 employees
- Large business: business with more than 199 employees



## INTRODUCTION

COVID-19 has created a global health crisis, and wreaked social, political and economic havoc worldwide. The human and financial costs of the pandemic have been documented in the form of widespread job losses, poor mental health and economic stress (OECD, 2020b). No sector is feeling this more right now than the tourism, hospitality and events industry.

The RESET (Resilient Enterprises and Sustainable Employment in Tourism) project has been established to support the recovery and transformation of the visitor economy in Melbourne's West. RESET Reports No. 1 and 2 have provided an overview of the characteristics and skill needs of Melbourne's West, and presented preliminary findings on the impact of the pandemic on tourism businesses (Lindsay-Smith et al., 2021b, Lindsay-Smith et al., 2021a). This RESET Report No. 3 provides an overview of key survey and interview findings.

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<sup>1</sup> The survey was originally circulated among employers located in Melbourne's West, but was later promoted to regions in Victoria. This supported a comparative analysis between Melbourne's West and non-Western regions (see Appendix E).

## METHODS

The RESET project is underpinned by the 'modified Destination Sustainability Framework' (Pyke et al., 2021). A detailed explanation of the framework can be accessed from its corresponding academic paper. The project employed a mixed research methodology:

1. An online survey was administered to business owners and managers from 1<sup>st</sup> of September to 8<sup>th</sup> December 2021<sup>1</sup>. A total of 275 responses were received from businesses located in Melbourne's West. The survey instrument is set out in Appendix A. The attributes of survey respondents and business characteristics are respectively listed in Appendices B and C.
2. Virtual, in-depth interviews were conducted with a purposeful sample of 33 stakeholders. Stakeholders comprised of businesses, government, tourism agencies, and community organisations. Participant details are highlighted in Appendix F.

# SURVEY FINDINGS



## IMPACT OF COVID-19

### Decrease in revenue

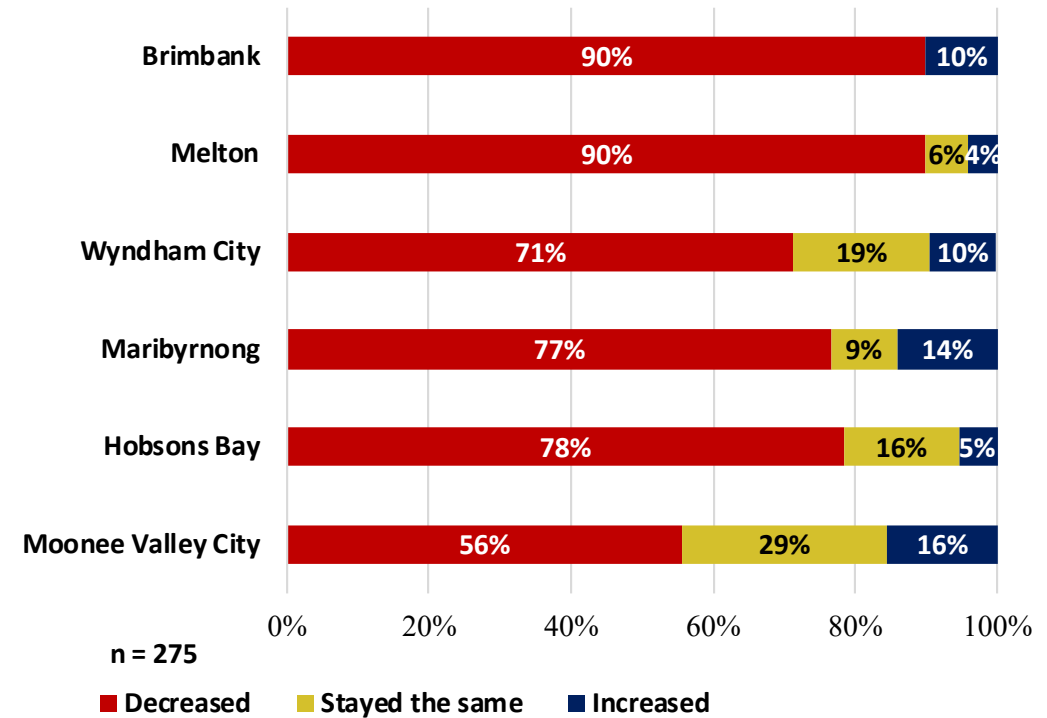
The pandemic resulted in financial losses for businesses located in Western Melbourne. Significant differences were found across Local Government Authorities (LGAs), with Brimbank and Melton reporting the largest proportion of businesses (90%) with decreased revenue.

### Staff lay-offs

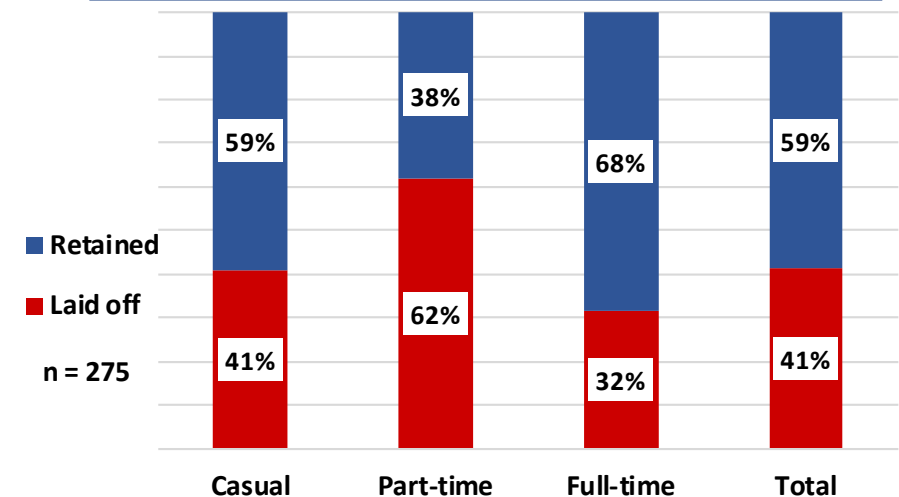
Widespread job losses were another negative outcome of the pandemic. Overall, 41% of the workforce were laid off. Staff redundancies were prominent among part-time workers (62%), followed by casual workers (41%) and full-time workers (32%).

Additional analysis underlined a decline of 26% in temporary visa holders as a result of COVID-19.

COVID-induced revenue changes across LGAs



Staff lay-offs, by employment type





### *Staff attraction and retention*

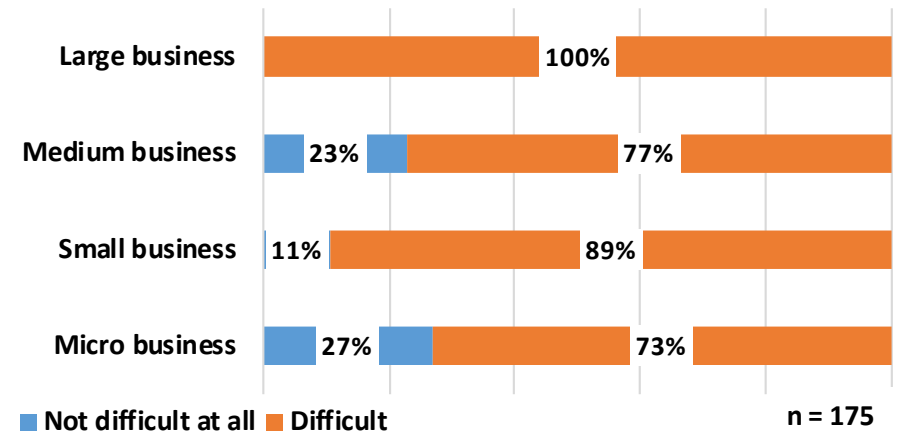
The survey highlighted respondents' difficulty in recruiting permanent and casual staff.

Overall, large businesses reported higher levels of difficulty in staff recruitment compared to micro businesses.

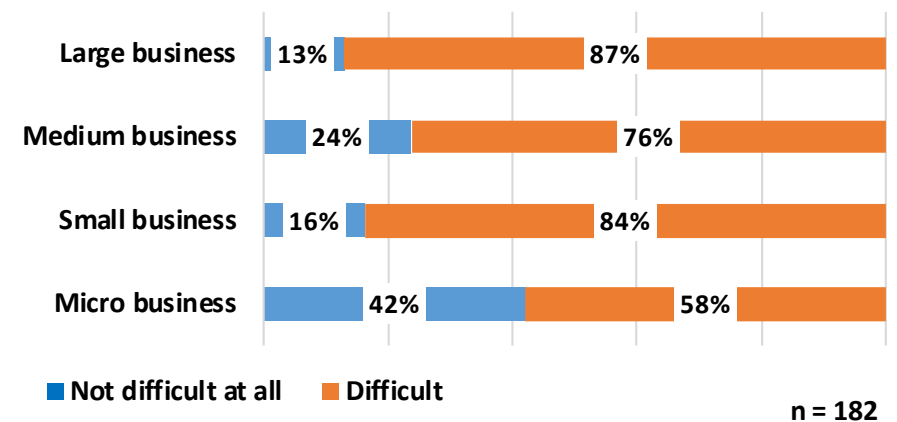
All large businesses (100%) found it difficult to recruit permanent staff compared to 73% of micro businesses.

A total of 87% of large businesses found it difficult to recruit casual staff compared to 58% of micro businesses.

Difficulty in recruiting PERMANENT STAFF, by firm size



Difficulty in recruiting CASUAL STAFF, by firm size





## BUSINESS CONFIDENCE IN NEXT 12 MONTHS

### *Confidence in business prospects*

The survey examined the confidence level of organisations in relation to their business prospects over the next 12 months. The results indicate significant differences among businesses depending on their size. Micro businesses (62%) were more worried about future business prospects than large businesses (36%).

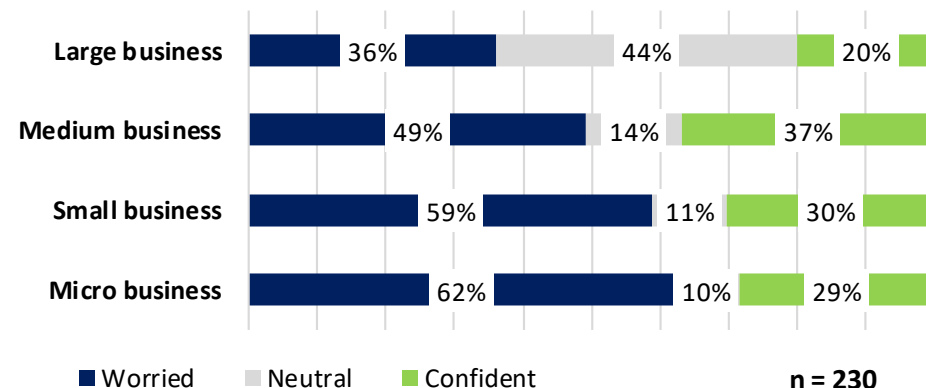
### *Confidence in attracting and retaining skilled staff*

Respondents were questioned on their level of confidence in attracting and retaining skilled staff in the next 12 months. Significant differences were observed among businesses based on their size.

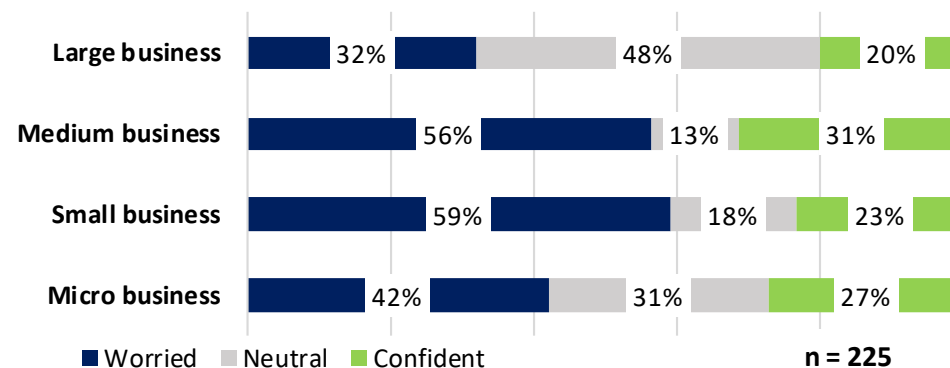
In terms of staff attraction, small businesses were more worried (59%) compared to large businesses (32%).

Similarly in terms of staff retention, small businesses reported lower levels of confidence (55%) compared to large businesses (36%).

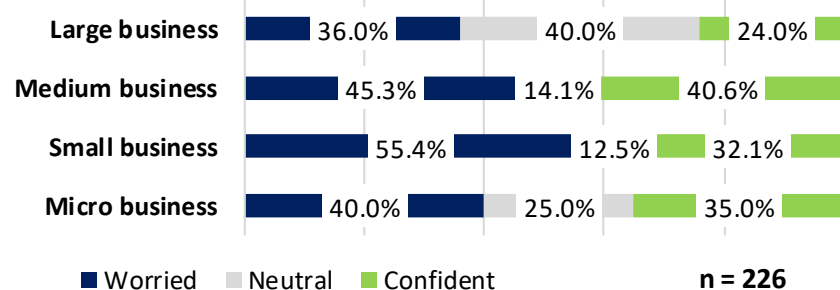
### Confidence in business prospects in next 12 months, by firm size



### Confidence in ATTRACTING skilled staff in next 12 months, by firm size



### Confidence in RETAINING skilled staff in next 12 months, by firm size



## STRATEGIC WORKFORCE MANAGEMENT

### Workforce planning

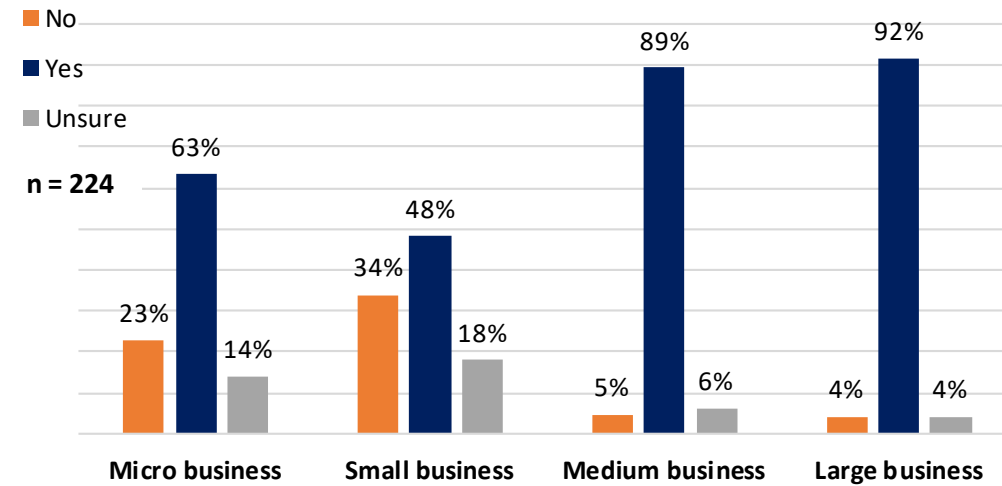
The survey revealed significant differences in workforce planning among different business sizes. A higher proportion of large (92%) and medium businesses (89%) undertook workforce planning compared to micro (63%) and small businesses (48%). Furthermore, a large majority of businesses (74%) which undertook workforce planning indicated that they regularly review their staffing needs.

Some of the reasons advanced by micro and small businesses for the absence of workforce planning include lack of knowledge and time, limited financial resources, and the limited value of formal planning within the context of small workforces. Workforce planning was also considered unnecessary by some sole traders.

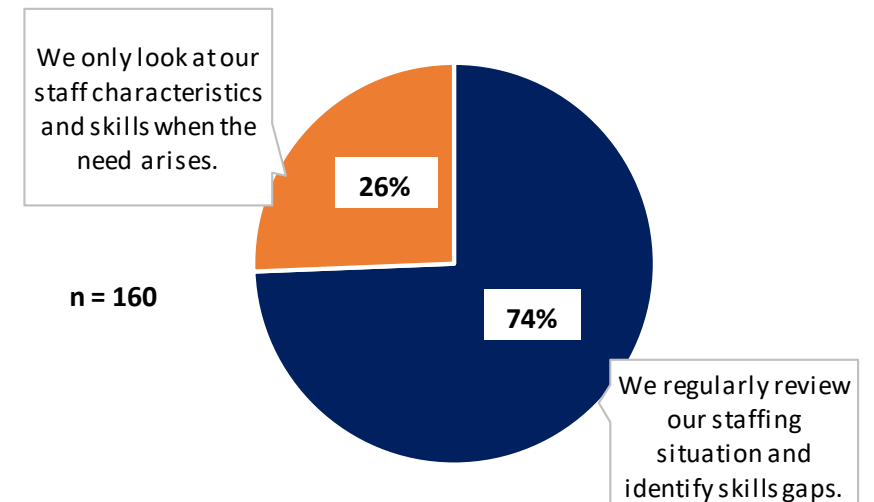
Significant differences were noticeable among LGAs in terms of the proportion of businesses undertaking workforce planning. Wyndham reported the largest uptake in business workforce planning (84.6%), while Brimbank recorded the lowest rate (55.6%). See Tables 1A and 1B in Appendix D.



### Proportion of businesses undertaking workforce planning, by firm size



### How businesses often undertake staff planning





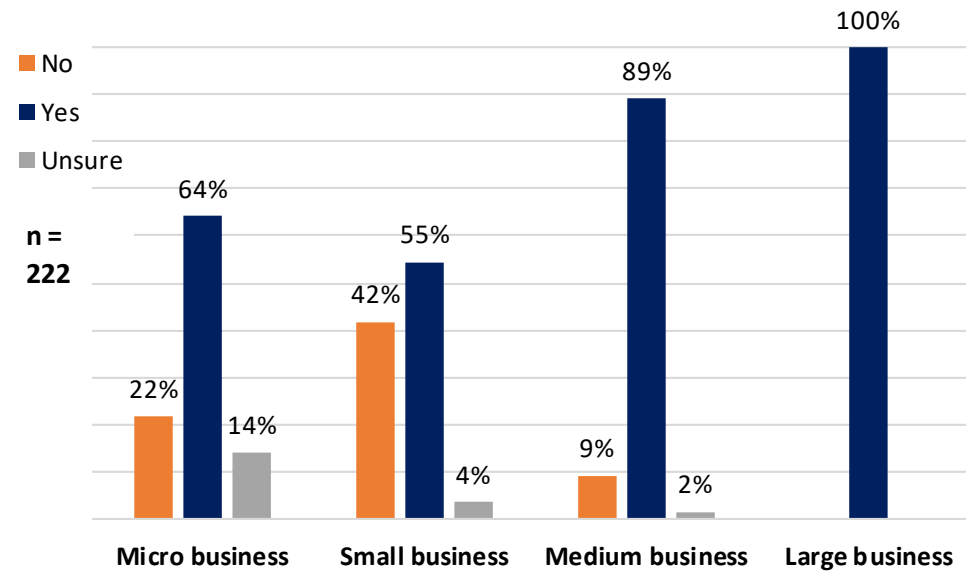
### Workforce training and development

The survey investigated businesses' budget allocation for staff training and development. Differences based on business size, sector and employment type were found.

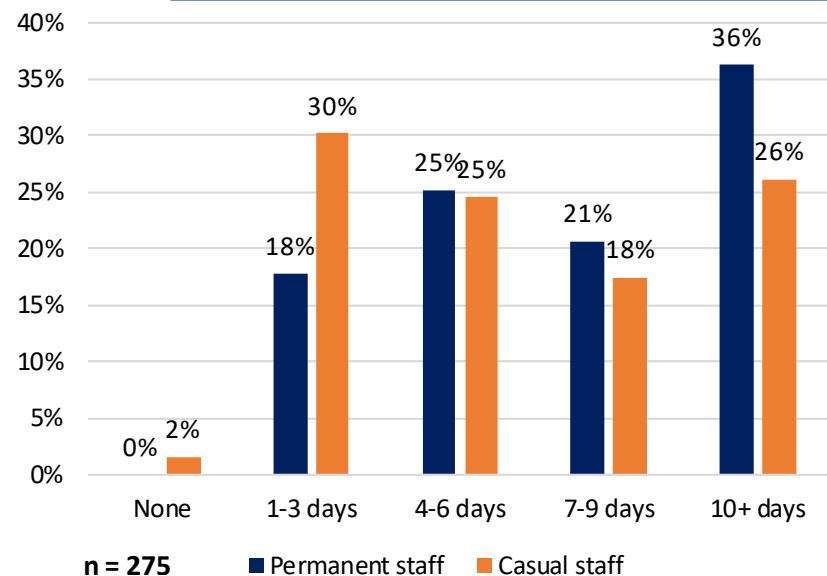
Large (100%) and medium (89%) businesses were more likely to allocate a training budget compared to small (55%) and micro businesses (64%). Likewise, businesses operating in the Attractions (92%) and Tours/Transport (91%) sectors were more inclined to allocate a training budget compared to businesses in Retail (63%) and Accommodation (65%) and Food/Beverage (65%). Permanent staff also benefited from longer training programs compared to casual staff.

Some barriers to workforce development in micro and small businesses include resource and time scarcity, the perceived superiority of on-the-job learning over formal training, and the absence of a training budget given that on-the-job learning is embedded within work activities.

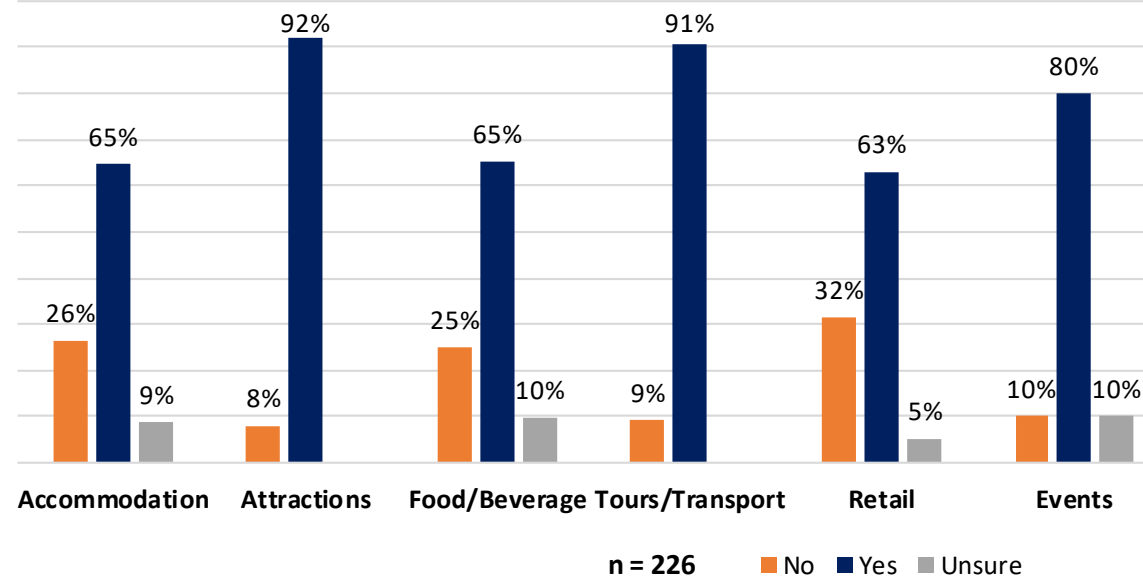
Proportion of businesses allocating a staff training budget, by firm size

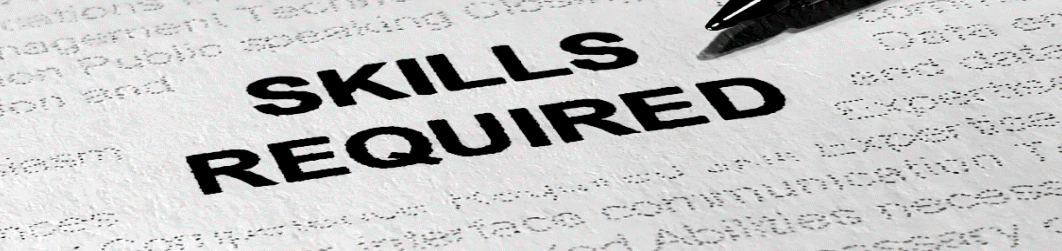


Average length of staff training, by employment type



Proportion of businesses allocating a staff training budget, by sector





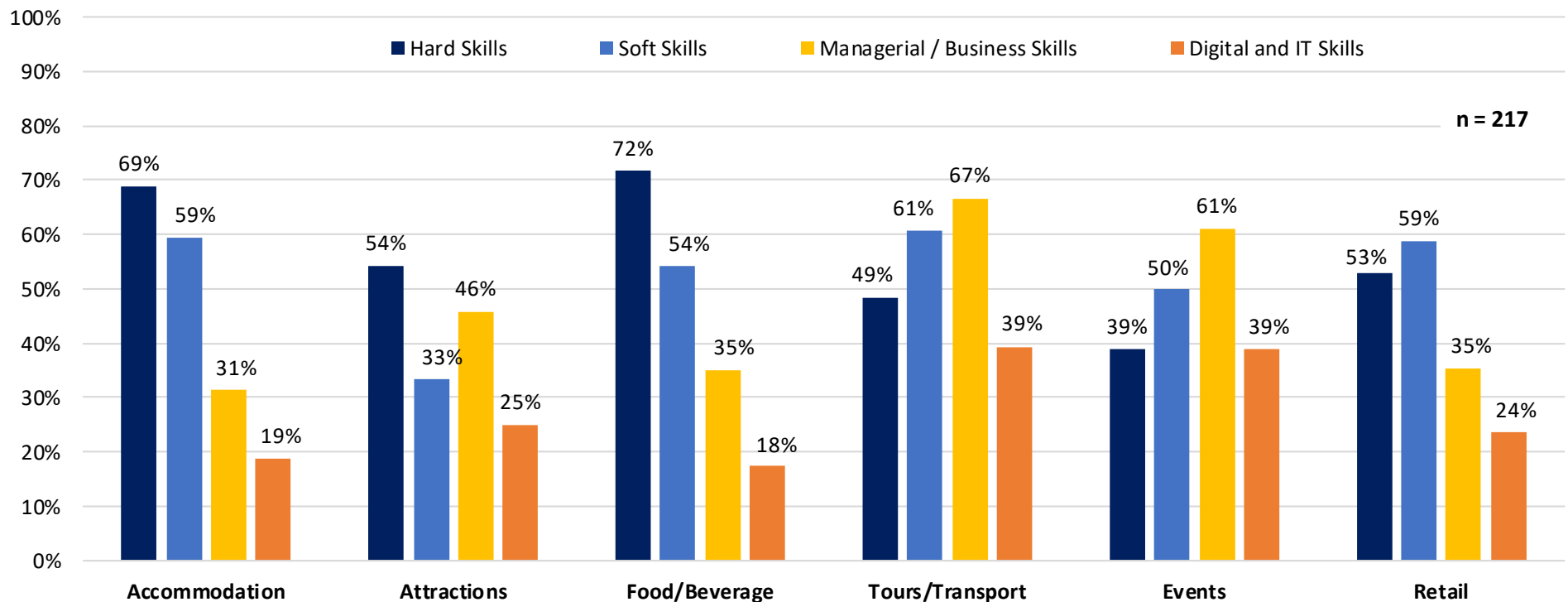
### Employee skill shortages

The survey examined employee skills that were difficult to source over the last 12 months. Overall, respondents reported shortages in hard skills (e.g. job-specific abilities like cooking, cleaning or machine operation) (59%), soft skills (e.g. languages, customer service, working with teams) (52%), managerial/business skills (e.g. planning and organisation) (41%), digital/IT skills (24%) and others (12%).

Differences in employee skills shortages were identified across LGAs. Hard skills were in demand in Moonee Valley, Hobsons Bay, Maribyrnong, and Wyndham. In contrast, Melton identified soft skills as being a priority area. Hard and soft skills were equally important in Brimbank. See Table 2 in Appendix D.

Across the sectors, Retail businesses reported the highest level of shortage in soft skills; Accommodation, Attractions and Food/Beverages businesses in hard skills; and Tours/Transport and Events businesses in managerial/business skills. This is shown in the figure below.

Employee skill shortages over last 12 months, by sector





## Wellbeing

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The survey employed a validated wellbeing scale (WHO-5) to measure respondent wellbeing (with a score of 0 indicating an absence of wellbeing whereas a score of 100 representing maximum wellbeing). The average wellbeing score in Melbourne's West was 58.6. Significant differences in wellbeing across business size, sector, and respondent role were identified.

The wellbeing score of small businesses (42.28) was significantly lower than that of other business sizes (for example, large businesses scored 67.32, medium businesses – 61.8, and micro businesses – 63.25). See *Tables 6A and 6B in Appendix D for raw data analysis*. The low wellbeing score of small businesses<sup>2</sup> warrants assessment for depression.

Retail and Hospitality sectors (56.96) also had a lower wellbeing compared to the Travel sector (63.92). See *Tables 6C and 6D in Appendix D for raw data analysis*.

Business owners recorded the lowest wellbeing score (52.64) compared to managers (64.08) and CEOs (61.44). See *Tables 6E and 6F in Appendix D for raw data analysis*.

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<sup>2</sup> According to the World Health Organization (WHO), a score below 50 out of 100 indicates poor wellbeing and is an indication for testing for depression.



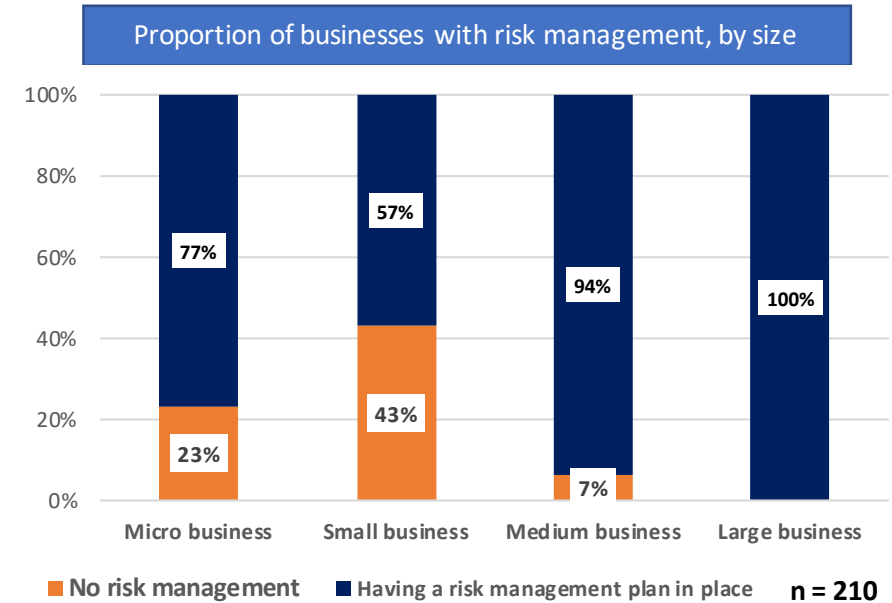
## RISK MANAGEMENT, ACCREDITATION AND BUSINESS RESILIENCE

### Risk management

A total of 77% of businesses in Melbourne's West had a risk management plan. The survey uncovered significant differences in risk management planning based on business size and sector.

While all large businesses (100%) reported the adoption of a risk management plan, only 57% of small businesses had formulated a risk management plan. See *Tables 7A and 7B in Appendix D*.

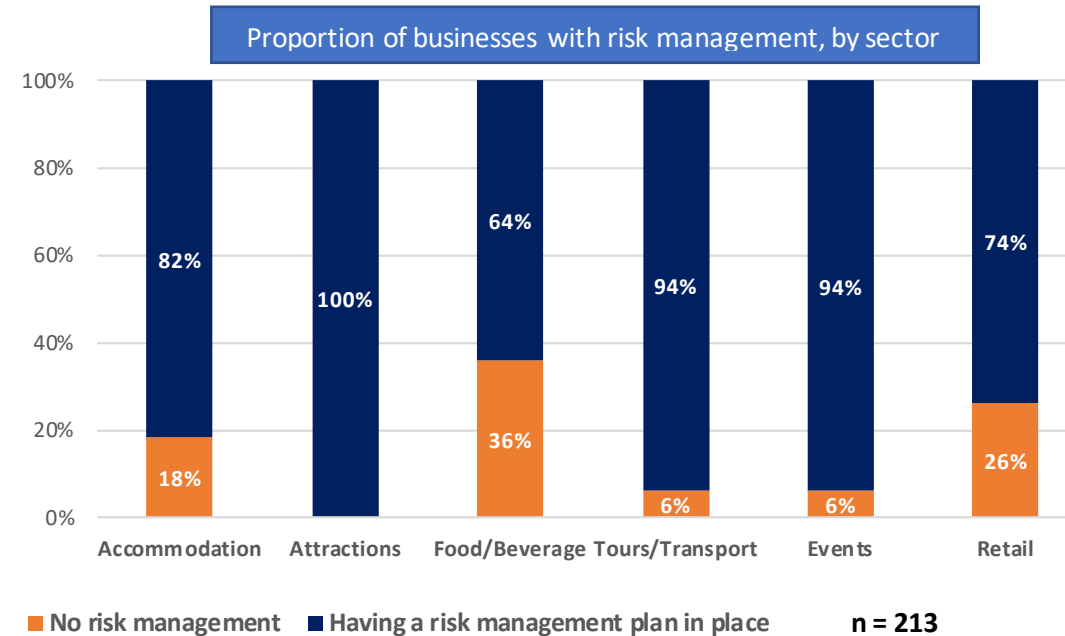
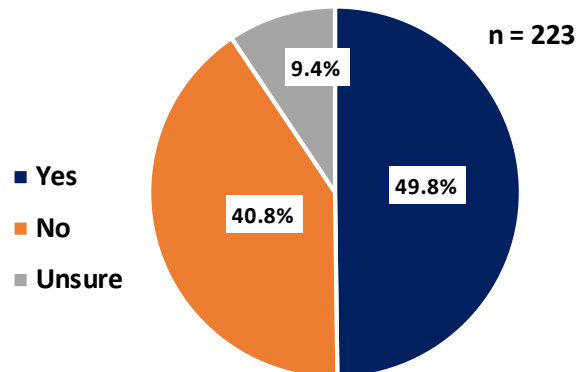
Risk management planning was prominent in the Attractions sector (100%) and the Tours/Transport sector (94%). In contrast, the Food/Beverage sector (64%) were the least likely to plan for risks. See *Tables 7C and 7D in Appendix D*.



### VTIC accreditation

Nearly half of businesses (49.8%) in Melbourne's West were accredited by the Victoria Tourism Industry Council (VTIC). Within LGAs, Moonee Valley City recorded the highest proportion of accredited businesses (57%) whilst Maribyrnong reported the lowest (40%).

Of businesses without VTIC accreditation, only 8% had completed other accreditations, such as Museum Accreditation, Zoological Standards, ISO, Emergency Response, GCC NDIS Accreditation, and Public Practice Review.



### *Business resilience and revenue recovery*

Findings indicate significant differences in planned and adaptive resilience across business size, with medium businesses exhibiting the highest planned and adaptive resilience attributes.

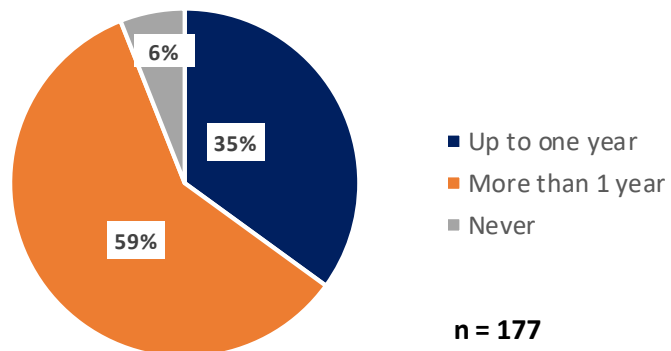
In the case of *planned resilience* (6-item scale; score range from 6 to 30), medium businesses had the highest score (25.3) compared to micro (22.9), small (21) and large businesses (22.4).

Similarly in the case of *adaptive resilience* (7-item scale; score range from 7 to 35), medium businesses reported the highest score (29) compared to micro (26.9), small (26.2) and large businesses (26.1). See *Tables 8A and 8B in Appendix D*.

Importantly, the analysis found a link between risk management and *overall business resilience* (13-item scale; score range from 13 to 65). Businesses with risk management planning processes were relatively more resilient (score of 47.95) compared to those without a risk management plan (score of 41.21).

Moreover, the majority of businesses (59%) indicated that they would need more than 1 year in order to financially recover from the effects of the pandemic.

Estimated time for the firm's revenue to return to pre-COVID-19 levels



## INTERVIEW FINDINGS


This section draws on the interview data to identify themes relating to business and destination resilience and vulnerability. Appendix G provides an overview of key findings.

### ORGANISATIONAL RESILIENCE-VULNERABILITY

#### *Financial resilience-vulnerability*

Whilst a handful of businesses (e.g. restaurants, government-owned entities and businesses with cash holdings) demonstrated some degree of cash resilience, the majority of micro and small businesses reported economic stress due to a reduction or complete halt in business activities.

Although government grants were considered a lifeline for business survival, participants reported difficulties in accessing some grants. These included language and digital literacy barriers of micro, small and Culturally and Linguistically Diverse (CALD) business owners, as well as the prevalence of the cash economy. There was some indication that the lack of timely tax reporting processes and the practice of paying cash-in-hand wages in micro and small businesses undermined their ability to secure government assistance packages such as JobKeeper (federal government funding program).



*'The cash economy has always been an issue in hospitality.... Employers who are paying cash, not paying employees correctly, they're not covered by Work Safe, they're not paying Super... they're putting their profit before their staff... These ones couldn't get JobKeeper because they weren't doing the right thing to start with' (P28)*

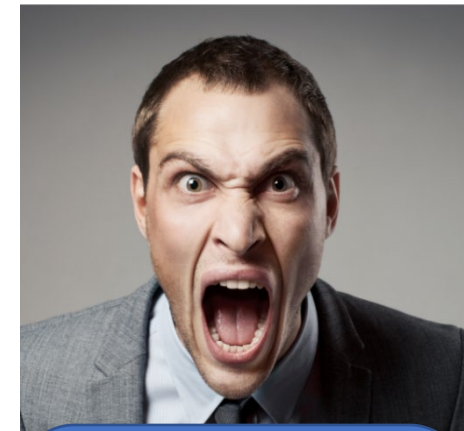
#### *Workforce resilience-vulnerability*

Labour shortages, a longstanding problem in the tourism, hospitality and events industry, reached crisis point following labour supply interruptions driven by international border closures and the mass movement of workers to more lucrative sectors. This in turn compelled businesses to reduce operations, and contract their menus and opening hours. At the same time, there was some evidence of employee retention and engagement in businesses with people-oriented cultures. For example, there were reports of employees being keen to resume work in-person in an arts and culture organisation due to its fun workplace environment and pleasant location. Similarly, employees were willing to perform tasks outside of their job description to support businesses.

#### *Risk management and mental health*

Employers found it difficult to uphold public health directives regarding vaccination checks and limiting venue access to unvaccinated customers. High incidences of customer hostility and abuse towards employees and business owners were reported by participants within this context.

The negative health outcomes of the pandemic were also evident for both employers and employees. Low wellbeing was fuelled by job/financial losses, social isolation, work-life balance struggles due to home-schooling, and drastic changes in individuals' work routines. Organisations implemented various initiatives to mitigate employees' poor mental health. Whilst




*'Having me and my staff enforce the rules [around vaccination mandates] is very bad on business... now we're getting yelled at... and the government does not care' (P26)*

micro and small business owners relied on regular check-ins with employees as a predominant support mechanism, medium and large organisations were predisposed to offer more structured mental health support including additional leave, mindfulness and meditation programs, mental health apps, open communications, and Employee Assistance Programs.

### *Business adaptability*

Mixed findings regarding business adaptability were uncovered. On the one hand, some businesses were able to draw on their brand and loyal membership base to strategically create new niche markets and retain existing customers. Others adopted new technology to support online operations and product offerings. Some examples of business adaptation include the packaging and virtual marketing of high tea boxes and introduction of online ordering systems by restaurants; securing government contracts to house essential workers by one medium accommodation business; and using digital platforms (such as Zoom) to connect with employees, business partners and customers (e.g. through virtual experiences).

On the other hand, micro and small businesses with limited digital capability and presence – especially those from CALD backgrounds – found it difficult to operate in a virtual environment. Businesses operating in the accommodation, travel, events and catering sectors were also inherently incapacitated in their ability to pivot to an online environment.



*'Our [travel agency] business was growing year by year but since COVID... we have no clients, we just have refunds... and it costs us a lot of time [to process refunds] and with no revenue' (P21)*

## DESTINATION CHARACTERISTICS AND OPPORTUNITIES

### *Destination image, infrastructure and planning*

Melbourne's West suffers from negative stereotypes and perceptions that stem from the destination's history as an industrial district. Other features of the destination that contribute to its poor image include: (i) limited visibility/lack of tourist attractions and cultural investments; (ii) inadequate collective destination marketing efforts of businesses which in turn undermine the destination's competitive advantage; (iii) low shade tree canopy which lowers the region's aesthetic appeal; (iv) limited public transport options in outer suburbs; (v) limited 4-star accommodation; and (vi) the destination's location which subsequently impacts consumption trends. For instance, due to its proximity to Melbourne CBD, the destination predominantly attracts day trippers who, unlike overnight visitors, do not bring high visitor spend.

*'We have to remove the thinking that the West is Melbourne's truck stop' (P1)*

Further, fragmented destination planning emerged as a key vulnerability. It appeared that government strategies and development priorities are not always aligned. Consequently, the importance of creating a cohesive vision shared by locals and other stakeholders was highlighted.

*'Thinking about the future of the West... one of the biggest challenges is that there are a lot of different planning overlays and strategies that are constantly coming out that seem disconnected... there needs to be a more cohesive approach to how we view the future...' (P14)*







### **Opportunities: Demography and investments**

Various opportunities were identified by participants. First, the robust population growth in Melbourne's West, particularly among young families and diverse communities, has the potential to increase demand for recreational and entertainment services. It was, for instance, reported that Indian communities, who are dominant in some Western suburbs, represent the highest membership base for Zoos Victoria since they prefer to spend money on family-oriented leisure activities. Within this context, it was suggested that community and tourism profiling is needed to match leisure needs of diverse community groups with tourism offerings.

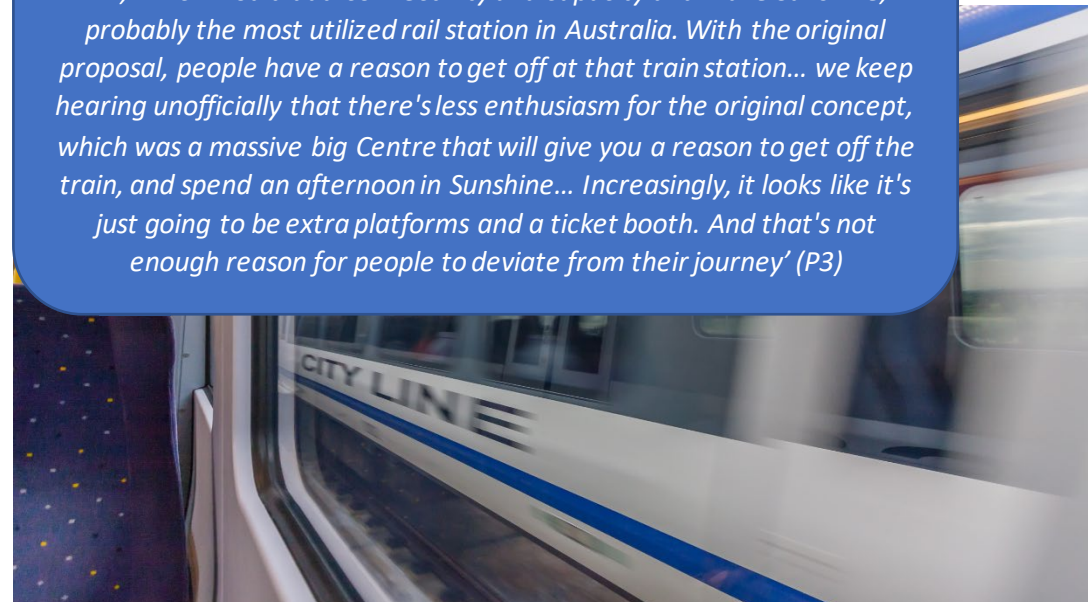
Second, the destination's multiculturalism and vibrant heritage are significant assets that can support the re-imagining of the visitor economy. As noted by one industry body representative, this requires careful planning to ensure a diversity of visitor experiences and community representation.

Finally, significant government investments are planned for the region in recognition of its growth. For example, Avalon Airport is emerging as a key aviation player. The proposed Melbourne Airport Rail infrastructure project (connecting Melbourne Airport to Sunshine, Melbourne CBD and other parts of Victoria) was hailed as a significant opportunity to convert Sunshine into a super hub and increase visitor traffic to the region. However, it appeared that stakeholders held different interpretations and perceptions on the overall objective and value of the project. Whilst state government seemed to view the investment as a transport solution, other stakeholders (LGAs, businesses and industry bodies) construed the project as an opportunity to bring in an influx of visitors to the region. Once again this heralds the need for shared stakeholder understanding and a coherent destination management vision.

*'It would be good to try and vary the retail or the cafe and dining out offer in Sunshine. There are so many Vietnamese noodle cafes and bakeries, and they're all great, but you just need a bit of diversity.... it's incredibly hard to do that in a freestanding sort of traditional shopping strip... You've got to do it by encouragement. You can't mandate it' (P12)*



*'The State has proposed a Sunshine Super Hub as part of the Airport Rail link, which would add connectivity and capacity and make Sunshine, probably the most utilized rail station in Australia. With the original proposal, people have a reason to get off at that train station... we keep hearing unofficially that there's less enthusiasm for the original concept, which was a massive big Centre that will give you a reason to get off the train, and spend an afternoon in Sunshine... Increasingly, it looks like it's just going to be extra platforms and a ticket booth. And that's not enough reason for people to deviate from their journey' (P3)*



## POLICY AND GOVERNANCE

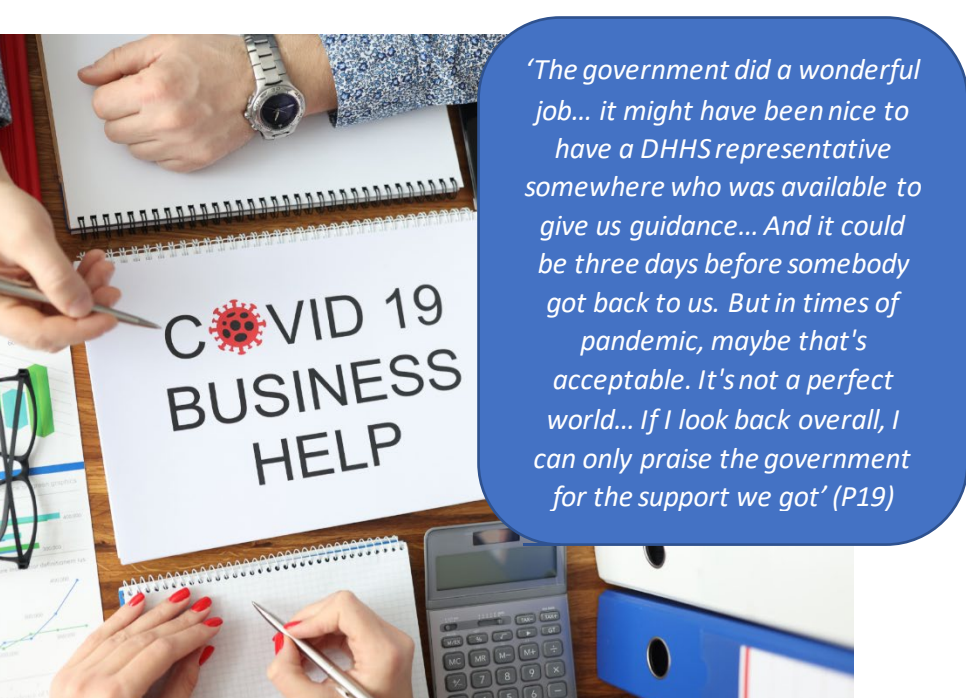
### *Government grants and support from LGAs and Traders Associations*

Businesses were provided with a range of support mechanisms during COVID-19. As indicated earlier, government grants (such as JobKeeper and rent relief schemes) were essential for business survival. Compared to private and not-for-profit organisations, government-owned and dual sector entities (i.e. those that are jointly government-owned and not-for-profit) were in a better position in terms of the ease of access and scope of government funding.

Furthermore, LGAs introduced various measures to facilitate business continuity. Amongst these feature simplified application processes for outdoor dining and liquor licences, the waiver of permit fees, the provision of outdoor furniture to micro and small businesses, and the allocation of micro-grants to assist CALD businesses set up their website. Similarly, Traders Associations worked closely with micro, small and CALD businesses to identify their training, marketing and digital needs.

### *Grant administration and communication processes*

Participants voiced concerns around the government's grant administration process. The exclusion of international students and migrant workers from JobKeeper (federal government funding program) was deemed unfair. Furthermore, COVID Test Isolation payments (state government funding program) together with fixed JobKeeper payments (irrespective of working hours) demotivated employees (especially casuals) from returning to work. Additionally, effort-reward imbalances in the form of cumbersome application and reporting processes for low grant amounts were highlighted. Government's communication processes in relation to grant conditions and organisations' public health obligations were labelled inadequate and ambiguous. For example, business owners recalled how last-minute lockdown announcements disrupted business operations and staffing arrangements.



*'The government did a wonderful job... it might have been nice to have a DHHS representative somewhere who was available to give us guidance... And it could be three days before somebody got back to us. But in times of pandemic, maybe that's acceptable. It's not a perfect world... If I look back overall, I can only praise the government for the support we got' (P19)*



*'People have taken unfair advantage of the system.... I know people who would get tested every week just to get the \$450 handout and wouldn't even isolate... When the government was paying... \$750 if you lost your shifts, a lot of my employees refused to come to work... With casual shifts, you don't get \$750' (P23)*

*'The government wanted everyone shut down... Across the industry, we get deliveries on a Thursday or latest Friday. So we've all got our deliveries in ready for the weekend, and we just got shut down by 8 o'clock. We had 3 hours' notice' (P27)*

## CONCLUSION

This report has shown how vulnerable the tourism, hospitality and events industry is to crises. Whilst COVID-19 was certainly responsible for substantial financial and emotional turmoil, the crisis also unveiled systemic cracks that existed prior to the pandemic. Unstructured processes or the absence of best practices (such as risk management and workforce planning) in micro and small businesses together with business owners' lack of attention to workforce experiences, retention and development weakened organisations' resilience potential. Importantly, the report illustrates how unique contextual conditions in Melbourne's West (i.e. a multicultural destination with a booming population and forthcoming infrastructure investments) serve as opportunities to alter the negative image of the destination and reinvent the visitor economy in the region.

Considering the challenges and opportunities in the destination, VTIC has established strategic priorities around employment, infrastructure and transport, and re-engaging customers in a new and sustainable future. Building on some of those priorities, the next phase of this research project is to validate research findings at an upcoming stakeholder workshop and strategically identify imperatives for industry recovery and transformation in Melbourne's West.





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# APPENDIX A: SURVEY INSTRUMENT

## SECTION 1: BASIC BUSINESS INFORMATION

Q1 In which Local Government Authority is your business based?

- Moonee Valley City
  - Hobsons Bay
  - Maribyrnong
  - Wyndham City
  - Melton
  - Brimbank
  - Hume
  - Moorabool
  - Mitchell
  - Whittlesea
  - Banyule
  - Moreland
  - Nillumbik
  - Darebin
  - Other (Please specify)
- 
- 

Q2 What is the main sector that your business operates in? (Mark one only).

- Accommodation
  - Attractions
  - Food/Beverage
  - Tours/Transport
  - Events
  - Retail
  - Other. Please specify
- 
- 

Q3 Prior to the pandemic, did you employ any staff?

- No, I was a sole trader or a partnership with no staff
- Yes we employed staff

Q4 Prior to the COVID-19 pandemic, how many of your staff (including yourself) were:

Casual

---

Part time

---

Full time

---

Q5 How many staff have been laid off as a result of the COVID-19 crisis who were:

Casual

---

Part time

---

Full time

---

Q6 We are aware that many tourism businesses rely on temporary visa holders such as international students and 457 visa holders but the COVID-19 pandemic has impacted the availability of this workforce

Approximately how many of your staff were temporary visa holders before the COVID-19 pandemic?

---

Approximately how many of your workforce are temporary visa holders now?

---

Q7 As of August 2021, how many years has the business been in operation under current ownership?

Less than 2 years

2-5 years

6-10 years

10 years or more

I am not sure

Q8 Which one of the following best describes your business type?

Government owned business

Privately owned business

Combination of the above

Other

---

Q9 What is your position? (please select best response)

Manager

Business Owner

CEO

Other (please specify)

---

## SECTION 2: IMPACT OF COVID-19

Q10 How has your firm's revenue changed since the onset of COVID-19?

- It has stayed the same
- It has increased
- It has decreased by up to 30%
- It has decreased by greater than 30%

---

Q11 How long do you think it will take for your firm's revenue to return to pre-COVID-19 levels?

- Never;
- Up to one year
- More than 1 year

Q12 Thinking about the next twelve months, how confident do you feel about

	Extremely worried	Somewhat worried	Neither confident nor worried	Somewhat confident	Extremely confident
Your business prospects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attracting /recruiting appropriately skilled staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retaining/keeping appropriately skilled staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

---

**SECTION 3: WORKFORCE AND STAFF SKILLS**

Q13 In the last six months how difficult have you found it recruiting the following types of roles?

	Not at all difficult	Somewhat difficult	Very difficult	Not applicable
Permanent staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Casual staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Q14 What skills have caused problems for your business with recruiting and/or retaining staff over the past 12 months? Select all that apply

- Hard Skills (e.g. job specific abilities like cooking, cleaning or machine operation)
  - Soft Skills (e.g. languages, customer service, working with teams)
  - Managerial / Business Skills (e.g. planning and organisation)
  - Digital and IT Skills
  - Other (please specify)
- 

Q15 Can you please specify which skill/s you particularly struggle to recruit or retain?

---

---

Q16 Do you undertake workforce/staff planning? (i.e. staff skill gaps or recruitment needs for your business in the future)

- Yes
- No
- I am not sure

Q17 How often do you undertake workforce/staff planning?

- We regularly review our staffing situation and identify skills gaps.
- We only look at our staff characteristics and skills when the need arises.

Q18 Please describe what stops you undertaking workforce planning? (e.g. lack of knowledge, no time, too costly)

---

---

Q19 Are you planning on recruiting any new staff in the next 18 months?

- Yes
- No
- Unsure

---

**SECTION 4: ORGANISATIONAL CULTURE AND TRAINING**

Q20 Please rate your agreement with the following about your business culture

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Employee satisfaction is a priority	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We aim to empower our employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employee safety is important	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employee training is important	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We reward our employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We try to build employee motivation and morale	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our employee benefits are satisfactory	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have clearly identified important priorities during and after a crisis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

---

Q21 How important are the following to your business:

	Not Important	Slightly Important	Moderately Important	Important	Very Important
Good environmental actions (e.g. saving water, reducing waste and greenhouse gases.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equal employment opportunities and/or diversity practices (e.g. recruiting older workers and Aboriginal Australians)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q22 Does your business allocate a budget for staff to undertake training?

- Yes
- No
- I am not sure

Q23 What is the average length of training that you provide/ allow per year per employee?

	1-3 days	4-6 days	7-9 days	10+ days	None	NA
Permanent staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Casual staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q24 What prevents you from allocating budget for staff training?

---



---

Q25 Please rate each of the following development /support programs in terms of their importance for upskilling you or your manager/s in the next twelve months

	Not Important	Slightly Important	Moderately Important	Important	Very Important
Basic business skills (e.g. sales, finance, business development)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Digital and technical skills (e.g. Office IT skills, business/accounting systems, cyber-security, technology design and computer programming)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing and advertising skills (including digital marketing)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Skills for adapting to change and crises (e.g. business planning, business models, risk management)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Soft skills (e.g. customer service, negotiating skills)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Leadership skills (e.g. leadership, critical thinking and innovation)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Human resource management skills (including building and engaging teams)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Collaboration and networking skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mental Health & Wellbeing support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## SECTION 5: ORGANISATIONAL RESILIENCE

---

Q26 Do you have a risk management plan for your business? (this is a plan where you identify what risks your business might be likely to face and how the impacts of the risks can be reduced if they do arise (e.g. Having extra insurance, setting aside financial reserves). Some types of risks might include pandemic, flood, food contamination, road closures, recession)

- Yes
- No
- I am not sure
- 

Q27 Has your business undertaken the Victoria Tourism Industry Council (VTIC), Quality Tourism Framework Accreditation Program?

- Yes
- No
- I am not sure

Q28 Has your business completed other business accreditations (for example ISO, GSTC sustainability accreditation).

- Yes
- No
- I am not sure

Q29 Which other accreditations has your business completed?

---

Q30 The following scale has been developed to assess the organisational resilience of tourism and hospitality businesses. Please indicate how much you agree or disagree with each of the following statements about your business planning and capabilities:

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
We monitor our industry for an early warning of emerging issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have clearly identified important priorities during and after a crisis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We build relationships with organisations we might have to work with in a crisis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We maintain enough resources (e.g. money) to absorb some unexpected change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have a focus to respond to the unexpected	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have good leadership for when we experience a crisis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The way we plan for the unexpected is appropriate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All our employees are committed to working on a problem until it is solved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If key people are unavailable, there are always others who could fill their role	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

We have the ability to use knowledge in new ways

We can make tough decisions quickly

There are not many things stopping us from working well with other organisations

We believe emergency plans must be practised and tested to be effective

---

Q31 We are aware that the ongoing COVID-19 restrictions have been very challenging for everyone, and especially business owners and managers in Tourism. We would appreciate if you could complete the following 5 questions, which have been designed by the World Health Organisation to measure wellbeing. The questions are completely voluntary and you can choose not to complete the questions.

Please respond to each item by marking one box per row, regarding how you felt in the last two weeks.

	At no time	Some of the time	Less than half the time	More than half the time	Most of the time	All of the time
I have felt cheerful and in good spirits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have felt calm and relaxed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have felt active and vigorous	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I woke up feeling fresh and rested	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My daily life has been filled with things that interest me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

---



**SECTION 6: ABOUT YOU**

**The following questions are about you**

Q32 What is your Ancestry (e.g. Vietnamese, Australian, English)? You can choose up to 2.

- English
  - Australian
  - Vietnamese
  - Indian
  - Italian
  - Maltese
  - Chinese
  - Greek
  - Irish
  - Other (please specify)
- 

Prefer not to say

---

Q33 What is the main language you speak at home?

- English
  - Vietnamese
  - Punjabi
  - Hindi
  - Urdu
  - Greek
  - Maltese
  - Arabic
  - Italian
  - Mandarin
  - Cantonese
  - Other (please specify)
- 

I prefer not to say

---

Q34 What is your gender?

- Male
  - Female
  - Non-Binary
  - Other
  - Prefer not to say
- 

Q35 What is your age?

- Less than 40 years old
  - 40 - 49 years old
  - 50 to 59 years old
  - 60 or more years old
  - Prefer not to say
- 

Q36 Do you have any comments/suggestions or anything else you would like to add?

---

Q37 Thank you very much for your participation. After this survey, we will be delivering some training for businesses in the Western Melbourne Region and we will also be conducting this same survey in 12 months time to see how everyone is going in their recovery. If you answer yes to either of these questions, please also enter your email in the

box below so we can contact you about these things. We will not share your details.

- Yes I would be interested in attending programs you develop
  - Yes I am happy to complete a survey in 1 year. If so, please enter your email address below so we can contact you in 1 year.
- 

No

## APPENDIX B: SURVEY RESPONDENT ATTRIBUTES

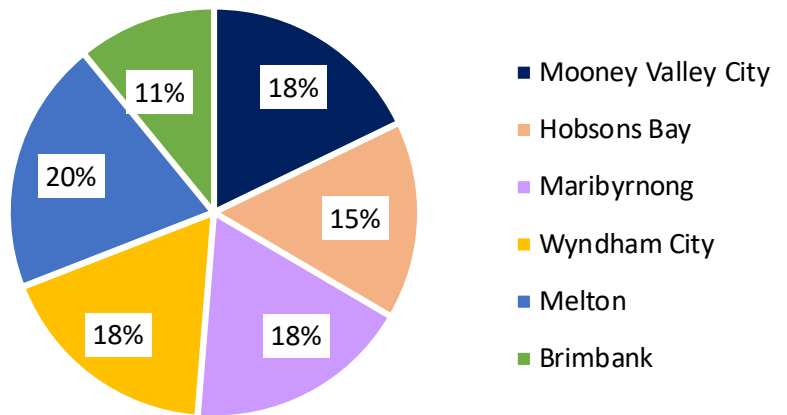
		FREQUENCY	PERCENTAGE
<b>POSITION</b> (n = 245)	Manager	76	31.0
	Business owner	117	47.8
	CEO	39	15.9
	Others	13	5.3
<b>GENDER</b> (n = 218)	Male	127	58.3
	Female	87	39.9
	Prefer not to say	4	1.8
<b>AGE</b> (n = 218)	Less than 40 years old	83	38.1
	40 - 49 years old	77	35.3
	50 to 59 years old	40	18.3
	60 or more years old	17	7.8
	Prefer not to say	1	0.5
<b>MAIN LANGUAGE SPOKEN AT HOME</b> (n = 216)	English	195	90.3
	Vietnamese	3	1.4
	Hindi	1	0.5
	Urdu	1	0.5
	Greek	3	1.4
	Maltese	1	0.5
	Italian	1	0.5
	Mandarin	5	2.3
	Cantonese	2	0.9
	Korean	1	0.5
	Gujarati	1	0.5
	Hazaragi	1	0.5
	I prefer not to say	1	0.5
<b>ANCESTRY*</b> (n = 275)	English	146	67.3
	Australian	53	24.4
	Chinese	25	11.5
	Vietnamese	5	2.3
	Indian	5	2.3
	Italian	8	3.7
	Maltese	4	1.8
	Greek	5	2.3
	Irish	5	2.3
	Others (Croatian, Czech, French, African, Korean, Macedonian, New Zealand, Pacific islander, Scottish, Sri Lankan, Ukrainian)	16	7.4
	I prefer not to say	3	1.4

\* Multiple responses allowed

# APPENDIX C: BUSINESS CHARACTERISTICS (SURVEY)

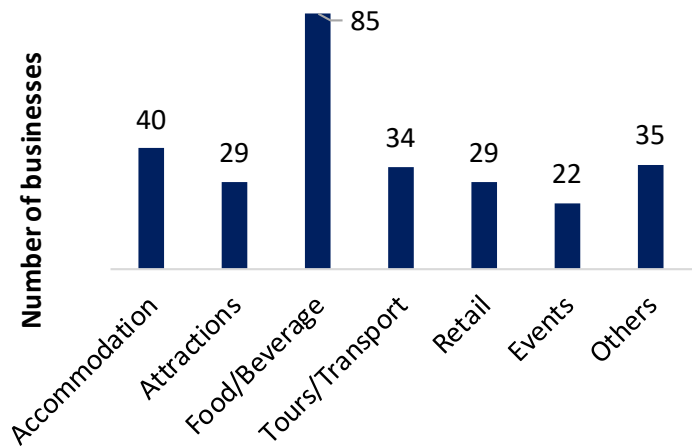
## REPRESENTATION BY REGION

Responses emanated from the six Local Government Authorities (LGAs) that make up the Western Melbourne Region. However, Brimbank reported the lowest response rate.



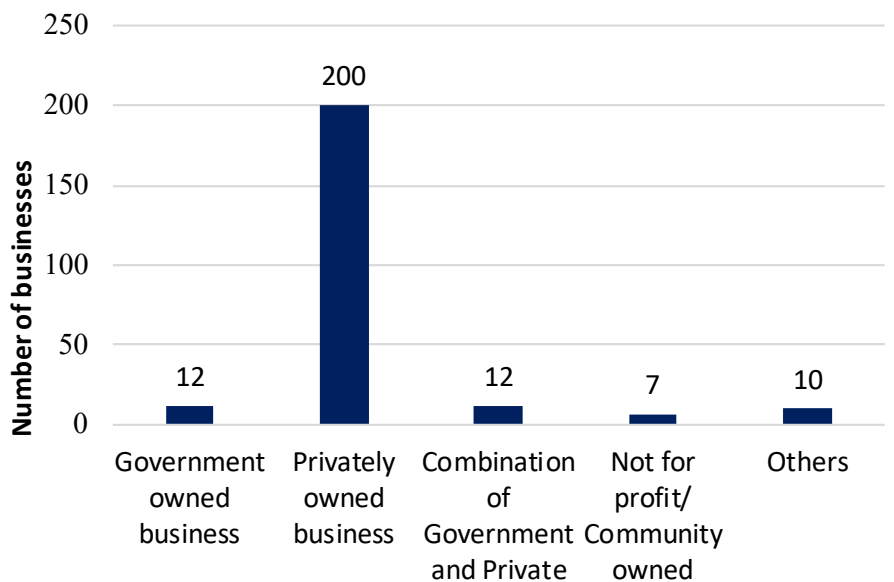
## REPRESENTATION BY SECTOR

Responses originated from a range of sectors, although the food and beverage sector had the largest representation.



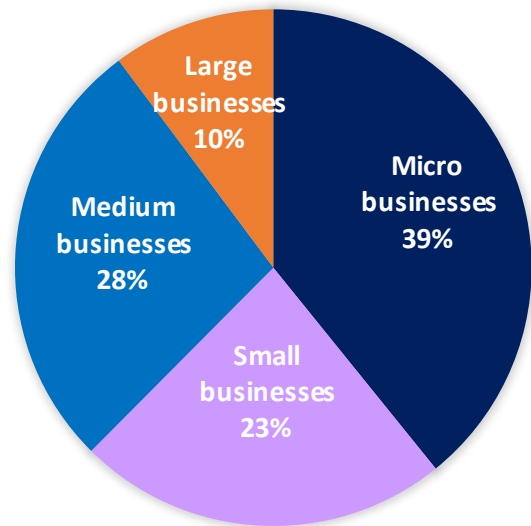
## BUSINESS TYPE

The highest proportion of respondents were privately owned businesses.



## BUSINESS SIZE

The majority of businesses (90%) were micro, small and medium-sized businesses. This is reflective of the tourism, hospitality and events industry which is traditionally dominated by these types of organisations (OECD, 2020a).



## APPENDIX D: QUANTITATIVE ANALYSIS OF SURVEY VARIABLES

Table 1A. Workforce planning by LGA – Crosstabulation

**WPlanning \* Local\_Government Crosstabulation**

			Local Government						
			Moonee Valley City	Hobsons Bay	Maribyrnong	Wyndham City	Melton	Brimbank	Total
Workforce Planning	No or unsure	Count	9	13	17	6	14	8	67
		% within Local Government	20.9%	36.1%	39.5%	15.4%	29.2%	44.4%	29.5%
	Yes	Count	34	23	26	33	34	10	160
		% within Local Government	79.1%	63.9%	60.5%	84.6%	70.8%	55.6%	70.5%
Total		Count	43	36	43	39	48	18	227
		% within Local Government	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 1B. Workforce planning by LGA – Chi-Square Tests

**Chi-Square Tests**

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	10.026 <sup>a</sup>	5	.075
Likelihood Ratio	10.350	5	.066
Linear-by-Linear Association	.430	1	.512
N of Valid Cases	227		

**Table 2. Employee skills in demand across LGAs**

**Skills\*Local\_Government Crosstabulation**

		Local_Government							
		Moonee Valley City	Hobsons Bay	Maribyrnong	Wyndham City	Melton	Brimbank	Total	
Skills	Hard Skills (job specific abilities like cooking, cleaning or machine operation)	Count	26	21	28	18	23	12	128
	% within Local_Government	72.2%	70.0%	73.7%	58.1%	54.8%	66.7%		
	Soft Skills (e.g. languages, customer service, working with teams)	Count	18	17	20	16	29	12	112
	% within Local_Government	50.0%	56.7%	52.6%	51.6%	69.0%	66.7%		
	Managerial / Business Skills (e.g. planning and organisation)	Count	16	12	15	13	23	10	89
	% within Local_Government	44.4%	40.0%	39.5%	41.9%	54.8%	55.6%		
	Digital and IT Skills	Count	10	8	7	7	13	8	53
	% within Local_Government	27.8%	26.7%	18.4%	22.6%	31.0%	44.4%		
<b>Total</b>	<b>Count</b>	<b>36</b>	<b>30</b>	<b>38</b>	<b>31</b>	<b>42</b>	<b>18</b>	<b>195</b>	

Percentages and totals are based on respondents.

**Table 3. Managerial skills in demand across LGAs**

	Moonee Valley City	Hobsons Bay	Maribyrnong	Wyndham City	Melton	Brimbank
Basic business skills (sales, finance, business development)	3.61	3.59	3.81	3.40	3.94	4.00
	Important	Important	Important	Important	Important	Important
Digital and technical skills	3.68	3.56	3.71	3.54	3.81	4.13
	Important	Important	Important	Important	Important	Important
Marketing and advertising skills	3.78	3.81	3.82	3.74	4.06	4.44
	Important	Important	Important	Important	Important	Very important
Skills for adapting to change and crises	3.65	3.81	3.92	3.71	4.16	4.20
	Important	Important	Important	Important	Important	Very important
Soft skills (e.g. customer service, negotiating skills)	4.16	4.11	3.87	3.66	4.29	4.25
	Important	Important	Important	Important	Very important	Very important
Leadership skills (e.g. leadership, critical thinking and innovation)	3.81	4.04	3.95	3.97	4.13	4.44
	Important	Important	Important	Important	Important	Very important
Human resource management skills	3.46	3.63	3.76	3.65	3.81	4.31
	Important	Important	Important	Important	Important	Very important
Collaboration and networking skills	3.70	3.81	4.03	3.74	3.81	4.31
	Important	Important	Important	Important	Important	Very important
Mental Health & Wellbeing support	4.11	4.22	4.14	3.94	4.32	4.69
	Important	Very important	Important	Important	Very important	Very important



**Table 4. Business culture by firm size**

	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
					Mean			
Micro	75	33.28	4.611	.532	32.22	34.34	12	40
Small	55	33.04	6.856	.924	31.18	34.89	8	40
Medium	65	35.09	3.844	.477	34.14	36.04	18	40
Large	24	30.08	5.555	1.134	27.74	32.43	24	40
Total	219	33.41	5.344	.361	32.69	34.12	8	40

**Table 5A. Perceived importance of equal employment opportunity and diversity practices**

	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Government owned business	12	4.17	.718	.207	3.71	4.62	3	5
Privately owned business	189	3.84	1.130	.082	3.67	4.00	1	5
Combination of the above	12	4.58	.669	.193	4.16	5.01	3	5

**Table 5B. Perceived importance of equal employment opportunity and diversity practices – ANOVA**

<b>ANOVA</b>					
	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	11.262	3	3.754	3.174	.025
Within Groups	329.967	279	1.183		
Total	341.230	282			

**Table 5C. Perceived importance of equal employment opportunity and diversity practices – Games-Howell Multiple Comparisons**

(I) business type	(J) business type	Mean Difference (I-J)	Std. Error	Sig.	95% Confidence Interval	
					Lower Bound	Upper Bound
Government owned business	Privately owned business	.436	.186	.120	-.08	.96
	Combination of the above	-.217	.257	.833	-.92	.48
	Other	-.062	.277	.996	-.82	.69
<b>Privately owned business</b>	Government owned business	-.436	.186	.120	-.96	.08
	<b>Combination of the above</b>	-.653*	.206	<b>.024</b>	-1.23	-.07
	Other	-.499	.231	.170	-1.15	.15
Combination of the above	Government owned business	.217	.257	.833	-.48	.92
	Privately owned business	.653*	.206	.024	.07	1.23
	Other	.154	.291	.951	-.64	.95

**Table 6A. Wellbeing score by firm size**

Descriptives								
	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Micro	74	15.81	6.232	.724	14.37	17.25	1	25
Small	49	10.57	6.788	.970	8.62	12.52	0	25
Medium	60	15.45	6.299	.813	13.82	17.08	1	25
Large	24	16.83	3.293	.672	15.44	18.22	11	22

**Table 6B. Wellbeing score by firm size – ANOVA**

ANOVA							
		Sum of Squares	df	Mean Square	F	Sig.	
WHO Wellbeing _Aggte	Between Groups	1074.964	3	358.321	9.656	.000	
	Within Groups	9536.814	257	37.108			
	Total	10611.778	260				

**Table 6C. Wellbeing score (Retail and hospitality vs Travel)**

Group Statistics					
	Sector_v2	N	Mean	Std. Deviation	Std. Error Mean
WHO Wellbeing _ Aggte	Retail & Hospitality	110	14.24	6.554	.625
	Travel	134	15.98	6.307	.545

**Table 6D. Wellbeing score by sector**

Independent Samples Test										
		Levene's Test for Equality of Variances		t-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
									Lower	Upper
WHO Wellbeing	Equal variances assumed	1.148	.285	-2.108	242	.036	-1.741	.826	-3.368	-.114
	Equal variances not assumed			-2.100	229.179	.037	-1.741	.829	-3.375	-.108

**Table 6E. Wellbeing score by position**

		Descriptive							
		N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
						Lower Bound	Upper Bound		
WHO Wellbeing	Manager	66	16.02	6.415	.790	14.44	17.59	1	25
	Business Owner	96	13.16	6.572	.671	11.82	14.49	0	25
	CEO	39	15.36	5.967	.955	13.42	17.29	0	25
	Other (please specify)	11	16.91	4.636	1.398	13.79	20.02	8	22
	Total	212	14.65	6.443	.442	13.77	15.52	0	25

**Table 6F. Wellbeing score by position – ANOVA**

ANOVA					
	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	1066.736	3	355.579	9.451	<.001
Within Groups	7637.535	203	37.623		
Total	8704.271	206			

**Table 7A. Risk management planning by firm size (Crosstabulation)**

**Risk management \* Firm Size Crosstabulation**

		Firm_Size				Total	
		Micro	Small	Medium	Large		
Risk management	No	Count	17	22	4	0	43
		% within Firm_Size	23.3%	43.1%	6.5%	0.0%	20.5%
	Yes	Count	56	29	58	24	167
		% within Firm_Size	76.7%	56.9%	93.5%	100.0%	79.5%
Total	Count	73	51	62	24	210	
	% within Firm_Size	100.0%	100.0%	100.0%	100.0%	100.0%	

**Table 7B. Risk management planning by firm size (Chi-Square tests)**

**Chi-Square Tests**

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	30.107 <sup>a</sup>	3	.000
N of Valid Cases	210		

**Table 7C. Risk management planning by sector (Crosstabulation)**

			Sector						
			Accommodation	Attractions	Food/Beverage	Tours/Transport	Events	Retail	Total
Risk management	No	Count	6	0	23	2	1	5	43
		% within sector	18.2%	0.0%	35.9%	6.1%	5.9%	26.3%	20.2%
	Yes	Count	27	25	41	31	16	14	170
		% within sector	81.8%	100.0%	64.1%	93.9%	94.1%	73.7%	79.8%
Total		Count	33	25	64	33	17	19	213
		% within sector	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

**Table 7D. Risk management planning by sector (Chi-Square tests)**

Chi-Square Tests			
	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	23.634 <sup>a</sup>	6	.001
Likelihood Ratio	29.012	6	.000
Linear-by-Linear Association	.044	1	.834
N of Valid Cases	213		

**Table 8A. Business resilience by firm size**

		Descriptives							
		N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
						Lower Bound	Upper Bound		
PR Aggte	Micro	91	22.87	3.781	.396	22.08	23.66	9	30
	Small	55	21.96	5.474	.738	20.48	23.44	9	30
	Medium	82	25.26	2.867	.317	24.63	25.89	18	30
	Large	32	22.41	3.435	.607	21.17	23.64	18	28
	Total	260	23.37	4.116	.255	22.87	23.88	9	30
AR Aggte	Micro	91	26.86	4.309	.452	25.96	27.75	11	35
	Small	55	26.18	5.334	.719	24.74	27.62	15	35
	Medium	82	29.00	3.573	.395	28.21	29.79	20	35
	Large	32	26.09	4.343	.768	24.53	27.66	21	34
	Total	260	27.30	4.479	.278	26.75	27.84	11	35



**Table 8B. Business resilience by firm size – ANOVA**

		ANOVA				
		Sum of Squares	df	Mean Square	F	Sig.
PR Aggte	Between Groups	453.126	3	151.042	9.825	.000
	Within Groups	3935.686	256	15.374		
	Total	4388.812	259			
AR Aggte	Between Groups	370.153	3	123.384	6.545	.000
	Within Groups	4826.043	256	18.852		
	Total	5196.196	259			

## APPENDIX E: COMPARATIVE ANALYSIS (MELBOURNE'S WEST VS NON-WESTERN REGIONS)

As briefly indicated in the 'Methods' section, additional responses from businesses located in other parts of Victoria (i.e. Non-Western regions) were collected. This enabled a comparative analysis between Western and Non-Western businesses. However, given the relatively small sample size from Non-Western regions (only 63 Non-Western businesses participated), responses are not representative of the entire population. Therefore, the following results should be viewed as an opportunity to conduct further comparative research in Victoria. **These results should therefore be interpreted with caution.**

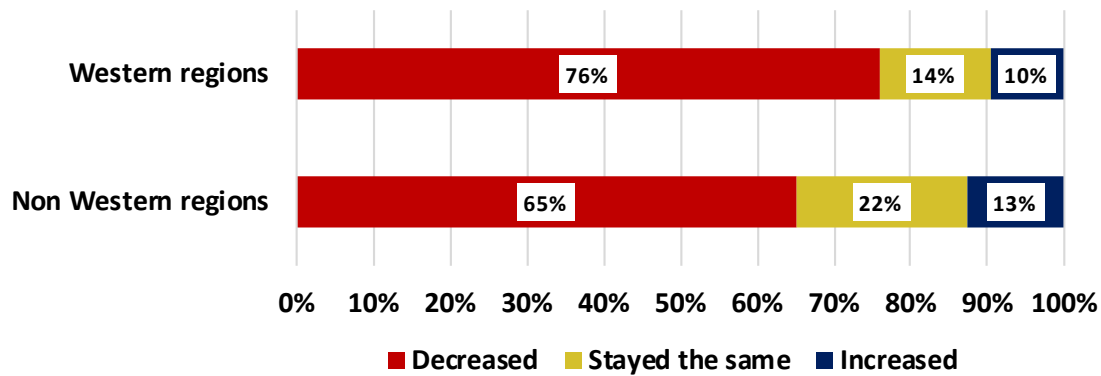
The comparative analysis highlighted the following findings:

1. A higher proportion of businesses in Melbourne's West (54%) is worried about future business prospects compared to businesses in Non-Western regions (42%).
2. The proportion of businesses undertaking staff planning in Western regions (71%) is lower than Non-Western regions (85%).
3. Businesses in Melbourne's West (77%) are less likely to adopt a risk management plan than businesses in Non-Western regions (88%).
4. There is a lower percentage of Western businesses (49.8%) undertaking VTIC Accreditation compared to Non-Western businesses (71.4%).
5. The wellbeing of businesses in Western regions (14.65) is lower than that of Non-Western businesses (17.32).

The statistical analysis for the above findings are set out in the following tables.

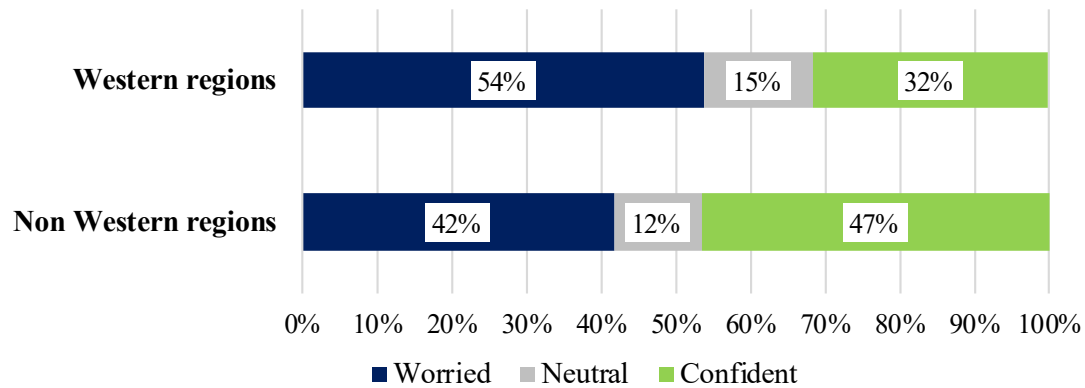
## IMPACT OF THE PANDEMIC

N<sub>West</sub> = 237 ; N<sub>Non-West</sub> = 63



## BUSINESS CONFIDENCE

N<sub>West</sub> = 234 ; N<sub>Non-West</sub> = 60



		Confident in business prospect			Total
		Worried	Neutral	Confident	
Non Western regions	Count	25	7	28	60
	% within regions	41.7%	11.7%	46.7%	100.0%
Western regions	Count	126	34	74	234
	% within regions	53.8%	14.5%	31.6%	100.0%
Total	Count	151	41	102	294
	% within regions	51.4%	13.9%	34.7%	100.0%

### Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	4.775 <sup>a</sup>	2	.092
N of Valid Cases	294		

## WORKFORCE PLANNING

N<sub>West</sub> = 227 ; N<sub>Non-West</sub> = 58

		Do you undertake <b>workforce/staff planning</b> ?			Total	
		No	Yes	I am not sure		
Regions	Non Western regions	Count	2	49	7	58
		% within regions	3.4%	84.5%	12.1%	100.0%
	Western regions	Count	41	160	26	227
		% within regions	18.1%	70.5%	11.5%	100.0%
Total	Count	43	209	33	285	
	% within regions	15.1%	73.3%	11.6%	100.0%	

### Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	7.788 <sup>a</sup>	2	.020
N of Valid Cases	285		

## VTIC ACCREDITATION

N<sub>West</sub> = 223 ; N<sub>Non-West</sub> = 56

		Has your business undertaken VTIC, Accreditation			Total	
		No	Yes	I am not sure		
Regions	Non Western regions	Count	12	40	4	56
		% within regions	21.4%	71.4%	7.1%	100.0%
	Western regions	Count	91	111	21	223
		% within regions	40.8%	49.8%	9.4%	100.0%
Total	Count	103	151	25	279	
	% within regions	36.9%	54.1%	9.0%	100.0%	

### Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	8.689 <sup>a</sup>	2	.013
N of Valid Cases	279		

## RISK MANAGEMENT

N<sub>West</sub> = 223 ; N<sub>Non-West</sub> = 56

		Do you have a <b>risk management plan</b> for your business?				
		No	Yes	I am not sure	Total	
Regions	Non Western regions	Count	5	49	2	56
		% within regions	8.9%	87.5%	3.6%	100.0%
	Western regions	Count	43	171	9	223
		% within regions	19.3%	76.7%	4.0%	100.0%
Total		Count	48	220	11	279
		% within regions	17.2%	78.9%	3.9%	100.0%

## WELLBEING

N<sub>West</sub> = 212 ; N<sub>Non-West</sub> = 56

### Group Statistics

		Western regions	N	Mean	Std. Deviation	Std. Error Mean
WHO Wellbeing Aggte	Non Western regions		56	17.32	5.557	.743
	Western regions		212	14.65	6.443	.442

### Independent Samples Test

		Levene's Test for Equality of Variances		t-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
									Lower	Upper
WHO Wellbeing	Equal variances assumed	3.357	.068	2.840	266	.005	2.675	.942	.820	4.530
	Equal variances not assumed			3.095	97.784	.003	2.675	.864	.960	4.391

## APPENDIX F: INTERVIEWEE ATTRIBUTES

STAKEHOLDER TYPE	PARTICIPANT ROLE	GENDER	ETHNICITY	PSEUDONYM
State government	Manager	Female	Australian	P1
State government	Manager	Female	Australian	P2
LGA 1	Coordinator	Male	Australian	P3
LGA 2	Coordinator	Male	Australian	P4
LGA 3	Manager	Male	Australian	P5
LGA 4	Officer	Female	Australian	P6
LGA 4	Officer	Female	American	P7
LGA 4	Coordinator	Male	Australian	P8
LGA 5	Officer	Male	Australian	P9
LGA 6	Officer	Female	Australian	P10
Industry body	Advisor	Male	Australian	P11
Industry body	Executive officer	Female	Australian	P12
Industry body	President	Male	Indian	P13
Medium, not-for-profit organisation	Executive Director	Female	Australian	P14
Small, not-for-profit organisation	Founder/volunteer	Female	Australian	P15
Government-owned organisation	Manager	Male	Indigenous Australian	P16
Medium, government-owned organisation	General Manager	Female	Australian	P17
Large, dual sector organisation (government-owned & not-for-profit)	General Manager	Male	Australian	P18
Large, dual sector organisation (government-owned & not-for-profit)	Director	Male	South African	P19
Micro, private organisation	Owner-manager	Female	French-Ethiopian	P20
Micro, private organisation	Owner-manager	Male	Vietnamese	P21
Micro, private organisation	Owner-manager	Male	Indian	P22
Small, private organisation	Owner-manager	Female	Indian	P23
Small, private organisation	Owner-manager	Male	Vietnamese	P24
Small, private organisation	Owner-manager	Female	Australian	P25
Small, private organisation	Owner-manager	Male	Middle-Eastern	P26
Medium, private organisation	Director	Male	Australian	P27
Medium, private organisation	General Manager	Female	Australian	P28
Medium, private organisation	General Manager	Female	Greek-Australian	P29
Medium, private organisation	Owner-manager	Male	Indian	P30
Medium, private organisation	Owner-manager	Male	Greek	P31
Medium, private organisation	CEO	Male	Australian	P32
Trade Union	Manager	Male	Australian	P33

## APPENDIX G: SUMMARY OF FINDINGS (INTERVIEW)

BUSINESS LEVEL		PRE COVID-19	DURING COVID-19
<b>VULNERABILITY ANALYSIS</b>	<b>1. Financial vulnerability</b>	Cash payments to employees & low-quality tax reporting standards of micro & small businesses	<p>Economic stress due to:</p> <ol style="list-style-type: none"> <li>1. Abrupt loss of customers (attributed to intermittent lockdowns and travel restrictions)</li> <li>2. Absence of or minimal cash inflows from sales</li> <li>3. Ongoing payments (e.g. commercial rent, car insurance)</li> </ol> <p>Asset depreciation (e.g. expired warranty on newly-acquired assets despite businesses' inability to trade)</p> <p>Difficulty of micro &amp; small businesses (including CALD businesses) in accessing the full suite of government grants, partly because of the cash economy, tax reporting issues, and language &amp; digital literacy barriers</p>
	<b>2. Workforce vulnerability</b>	<p>Subpar employment conditions (minimum wage, job insecurity, unsocial hours, minimal career paths, physically demanding work)</p> <p>Low pay in not-for-profit organisations which are not government-owned</p> <p>Declining trade union power &amp; inability to change employment conditions: fragmented industry, low membership due to highly casualised workplaces</p>	<p>Acute labour shortage driven by:</p> <ol style="list-style-type: none"> <li>1. Staff redundancies &amp; subsequent employee movement to more stable &amp; rewarding industries</li> <li>2. Staff poaching by large businesses</li> <li>3. Border closures &amp; inadequate access to temporary workforce pools (e.g. international students and working holiday visa holders)</li> <li>4. Shortcomings of government support packages:               <ol style="list-style-type: none"> <li>a. Certain employee groups (e.g. international students, temporary visa holders, and casual workers who did not meet the length of service threshold) were not eligible for government assistance</li> <li>b. JobKeeper &amp; COVID-19 Test Isolation payments acting as a disincentive for eligible employees to return to work</li> </ol> </li> </ol>

			<p>Loss of volunteer labour &amp; critical skills in the not-for-profit sector</p> <p>High casualization &amp; worker mobility suggest high virus transmission risks across businesses</p>
	<b>3. Risk management and mental health issues</b>	Informal approach to managing risks in micro & small businesses	<p>Nature of COVID-19 (novel, ongoing &amp; fluctuating conditions) &amp; businesses intuitively responding to the crisis</p> <p>Organisational challenges of enforcing public health directives:</p> <ol style="list-style-type: none"> <li>1. Additional costs borne by businesses (e.g. appointment of COVID Marshals)</li> <li>2. Onus on businesses to check vaccination records. This is perceived as unfair by business owners who consequently experience customer backlash (resistance to validate their vaccination status and resulting abusive behaviour, poor business reviews and customer losses)</li> <li>3. Difficulty of staff &amp; business owners in identifying fake vaccination certificates</li> <li>4. Some measures perceived as culturally inappropriate by CALD business owners (e.g. cultural significance of shared meals in African diasporic communities &amp; refusal to serve customers is inappropriate)</li> </ol> <p>Mental health challenges of:</p> <ol style="list-style-type: none"> <li>1. Employees</li> <li>2. Managers and business owners, especially those in micro &amp; small businesses</li> </ol>



	<p><b>4. Lack of business adaptability</b></p>	<p>Low digital capability &amp; digital presence of:</p> <ol style="list-style-type: none"> <li>1. Micro &amp; small businesses, especially those from CALD communities</li> <li>2. Not-for-profit organisations (constrained from adopting up-to-date technology &amp; telecommunication systems due to limited resources)</li> </ol>	<p>Temporary business closure for some types of businesses (e.g. travel agents, events &amp; catering, accommodation)</p> <p>Delay in permit processing prevented some businesses to pivot</p> <p>Difficulty of businesses with limited digital capability, literacy &amp; presence to operate in a virtual COVID-19 environment</p> <p>CALD businesses highly disadvantaged in a virtual setting: CALD customers preferring physical store shopping experiences</p> <p>Constraints of online interactions:</p> <ol style="list-style-type: none"> <li>1. Online advocacy challenges: lack of visibility of the mission &amp; impact of not-for-profit organisations, &amp; resulting funding implications</li> <li>2. Digital fatigue of customers &amp; decreased interest in digital experiences as the pandemic progressed</li> </ol>
<p><b>RESILIENCE ANALYSIS</b></p>	<p><b>5. Financial resilience</b></p>		<p>Some degree of cash resilience of:</p> <ol style="list-style-type: none"> <li>1. Organisations which could easily access government grants, especially those which are fully or partially government-owned</li> <li>2. Businesses with cash holdings and/or diversified revenue streams</li> <li>3. Food operators who could quickly pivot to take-out models</li> </ol> <p>Small Business Digital Adaptation Grant (state government grant) supported micro&amp; small businesses to build digital capability &amp; keep accounting records up-to-date</p>

	<b>6. Workforce resilience</b>	<p>Evidence of some good employers who adopt fair reward structures &amp; have zero tolerance to sexual harassment (union accredited businesses with 4/5 star ratings)</p> <p>People-oriented cultures in businesses, manifested through:</p> <ol style="list-style-type: none"> <li>1. The use of non-financial &amp; financial rewards (e.g. individual &amp; team bonuses, employee recognition, work-life balance)</li> <li>2. Fair &amp; respectful treatment of employees</li> <li>3. Team work &amp; inclusive work environment</li> </ol> <p>Attracting employees who strongly identify with the values &amp; mission of not-for-profit organisations</p>	<p>Employee retention &amp; employee motivation to return to work due to:</p> <ol style="list-style-type: none"> <li>1. People-oriented cultures &amp; strong commitment to employer</li> <li>2. Staff redeployment in medium and large organisations</li> <li>3. Fun workplace &amp; pleasant business location</li> </ol> <p>Possible use of robot waiters to address labour shortage (although automation was simultaneously seen as a barrier to social interactions &amp; connections)</p> <p>Employee resilience &amp; positive attitudes apparent from reports of:</p> <ol style="list-style-type: none"> <li>1. Employees performing tasks outside of their job description to fulfil business needs)</li> <li>2. Proactive &amp; problem solving behaviours of employees</li> </ol>
	<b>7. Risk management and mental health support</b>	<p>Formal risk management strategy in most medium &amp; large organisations</p>	<p>Introduction of a range of mental health initiatives to support to employees, including:</p> <ol style="list-style-type: none"> <li>1. Regular check-ins with employees &amp; online team building games</li> <li>2. Mindfulness &amp; meditation programs</li> <li>3. Mental health apps &amp; mental health ambassadors</li> <li>4. Additional leave</li> <li>5. Care packages sent to employees</li> <li>6. Securing clearance for vulnerable employees (e.g. employees who cannot safely stay at home) to come to work</li> </ol> <p>Self-care opportunities for some business owners &amp; managers: reduced working hours, less travel &amp; improved work-life balance</p>

	<b>8. Business adaptability</b>	<p>Strong business brand &amp; loyal membership base of some businesses</p> <p>Business transformation of one not-for-profit organisation (expanding services to become an NDIS provider – steady &amp; significant source of income)</p>	<p>Business owner resilience, commitment &amp; adaptability, including the cultural integration of migrant business owners and lifelong learning</p> <p>Accelerated technology adoption by businesses to support their operations &amp; product offerings (e.g. online booking systems, digital experiences, virtual packaging &amp; marketing of products, Zoom meetings)</p> <p>One hotel altered its target market to house essential workers (not high COVID risk)</p>
<b>DESTINATION LEVEL</b>		<b>PRE COVID-19</b>	<b>DURING COVID-19</b>
<b>VULNERABILITY ANALYSIS</b>	<b>9. Image and marketing issues</b>	<p>Destination’s historic root as an industrial district</p> <p>Limited attractions, activities, entertainment &amp; cultural investments despite growing young adult audience</p> <p>Low shade tree canopy</p> <p>Visitor spend in key attractions (e.g. Werribee Zoo) does not filter out to the community. [Possible attractions – focusing on geology and history products in Melton (volcano region)]</p> <p>Lack of collective destination marketing and packaging of experiences in Melbourne’s West, and having to compete with more attractive and easily accessible regional destinations</p> <p>Location: On one hand, proximity to Melbourne &amp; prevalence of day trips. Limited opportunities for overnight visitation which brings higher visitor spend.</p>	<p>Prolonged nature of the crisis and contained measures limited visitor circulation within the destination</p> <p>Barriers to interstate &amp; international travel:</p> <ol style="list-style-type: none"> <li>1. Low consumer confidence to travel</li> <li>2. Poor reputation of Melbourne (strict lockdowns &amp; high infection rates) &amp; Melbourne’s West as travel destinations</li> <li>3. Melbourne no longer attractive to temporary workers</li> <li>4. Exorbitant costs of travel insurance &amp; travel policies excluding COVID-19 risks</li> </ol> <p>Labour shortages leading to poor visitor experience across the industry</p> <p>Negative media portrayal of quarantine hotels. Strategic decision of a hotel not to convert into quarantine facilities – focus on brand protection</p>

		On the other hand, perception that the West is too far and it is therefore neglected as a travel destination	Lack of data-driven marketing strategy. Therefore, importance of profiling visitors by: <ol style="list-style-type: none"> <li>1. Acquiring a refined understanding of needs of diverse ethnic groups (e.g. Indian community likely to spend money for family experiences)</li> <li>2. Data-driven decision-making processes. However, data is expensive and there are no data-sharing practices across businesses</li> </ol>
	<b>10. Infrastructure and destination planning issues</b>	<p>Lack of cohesive vision &amp; fragmented planning/development initiatives</p> <p>Inadequate 4 star accommodation &amp; loss of existing rooms for leisure guests (e.g. rooms rented out for COVID isolations, or hotels reverting to corporate residences) – BUT on a positive note, there are plans for 5 accommodation venues in the future</p> <p>Lack of public transport options in outer parts of Melbourne’s West</p> <p>Some future developments may be impacted by external factors such as the proposed windfall tax for every rezoned development, height limitations for buildings in flight paths, &amp; councils’ bureaucratic processes</p>	<p>Anticipated delays in infrastructure projects (North West City deal) as a result of government’s focus on the pandemic</p> <p>Limited resources of councils &amp; Parks Victoria to maintain infrastructure and deliver projects</p>
	<b>11. Policy and governance issues</b>	<p>No marginal seats &amp; little political clout in Melbourne’s West. Weak political clout of Vietnamese associations</p> <p>Inequity in government funding across Victoria: councils, RTBs and private investors with strong lobbying powers and which demonstrate their economic value are more likely to be economically supported than grassroots operations</p>	<p>Regional destinations attracting significant attention and government investment (under the ‘Visitor Economy Recovery &amp; Reform Plan)</p> <p>Low-quality grant administration processes by government: <ol style="list-style-type: none"> <li>1. Costly &amp; inequitable JobKeeper funding model (exclusion of international students &amp; migrant workers from</li> </ol> </p>

		<p>Lack of government recognition of the value of the visitor economy:</p> <ol style="list-style-type: none"> <li>1. Australia (young nation) does not have the same cultural appreciation as Europe &amp; America which have a deep respect for tourism and hospitality</li> <li>2. Lack of understanding of the industry translates into lack of collaboration and communication between state and federal governments and absence of government leadership to drive change in the sector</li> </ol>	<p>JobKeeper; unfair distribution of support payments among employees and businesses)</p> <ol style="list-style-type: none"> <li>2. Cumbersome application processes not proportionate to small grant amounts</li> <li>3. Ambiguous grant eligibility criteria &amp; online processes, which especially disadvantage CALD businesses</li> <li>4. Grant opportunities &amp; dining schemes skewed towards Melbourne CBD &amp; regional Victoria (although there is some acknowledgement that worker exodus to regions have negatively impacted Melbourne CBD businesses)</li> </ol> <p>The content &amp; communication process of public health directives by government are out of tune with business realities:</p> <ol style="list-style-type: none"> <li>1. Inadequate communication, and last-minute government regulations impacting staffing, day-to-day business operations and event planning, supply chain &amp; employer mental health. At the same time the state government representative argued that regulations were driven by volatile epidemiology considerations</li> <li>2. Ambiguity of health orders: state government employees unable to interpret their own health orders and directing businesses to their website. Huge fines (\$100,000) attached to non-compliance of health regulation</li> <li>3. Density limits not economically viable for businesses, especially those with no outdoor dining area</li> <li>4. 5KM travel radius restriction was particularly detrimental to CALD business which relies on regular ethnic customers</li> </ol> <p>Overall, loss of trust in government response &amp; reluctance of businesses to invest further in the destination/industry</p>
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	<b>12. Collaboration and tourism network challenges</b>	<p>Key roles of trader associations: (i) for destination marketing and (ii) acting as a conduit to facilitate communication between local businesses and councils/councillors However, lack of work synergy among trader associations</p> <p>Federal-state government collaboration challenges (as mentioned above in item 11)</p> <p>Councils in Melbourne’s West not always adopting a collective advocacy approach (as further discussed in item 15)</p>	<p>Tension point which arose for trader association Presidents during the pandemic: either look after their members’ needs or focus on their own business/try to remain solvent</p> <p>COVID-induced business closures and changing destination demography, hence the need for councils to facilitate connections with new entrants</p>
	<b>13. Broader risks</b>	<p>Long-term implications of climate change for the tourism and hospitality industry: possible reticence to travel by jets, loss of jobs and lower disposable income</p> <p>Low wage economy &amp; drastic surge in the price of rental accommodation &amp; housing</p>	<p>Changed societal dynamics: customers having to interact through a digital interface (for booking purposes) and wear face masks before they can access the essence of the visitor experience: place, culture, connections and humanity</p> <p>Supply chain issues: shortage or increased price of raw materials (driven by labour shortage/unvaccinated workers, quarantine of shipping containers for materials sourced overseas, and opportunistic suppliers)</p>
<b>RESILIENCE ANALYSIS</b>	<b>14. Image and marketing</b>	<p>Demography: Population growth &amp; diversity: Melbourne’s West likened to a ‘cultural party’</p> <p>Some attractions: natural environment (Hobson Bay), Sun Theatre (Yarraville)</p>	<p>Post-lockdown, demand for creative experiences will depend on disposable income, but there are positive signs that:</p> <ol style="list-style-type: none"> <li>1. Audiences, craving for human connections, are willing to return to the arts industry</li> <li>2. People are desperate to visit Melbourne (the events, festival and food capital)</li> </ol> <p>Some areas (e.g. Hobsons Bay) were sheltered from the pandemic: they generally service the local economy &amp; do not rely on visitation. Furthermore, during lockdown, work-</p>

			from-home meant that more locals were in circulation & willing to spend in those regions
	<b>15. Investment in infrastructure and destination planning</b>	<p>Melbourne Airport Rail (MAR) project (connecting Melbourne Airport through to Sunshine, then to Melbourne CBD and other parts of Victoria); Sunshine to be turned into a super hub. However:</p> <ol style="list-style-type: none"> <li>1. Catalyst projects needed to incentivise visitors to get off the train at Sunshine (visitor spend) rather than just pass through; creating experiences where people congregate – maybe satellite Art Gallery or big stadium, need diversification of retail &amp; dining facilities (currently, Vietnamese restaurants are predominant)</li> <li>2. Importance of strategically positioning stops – but this is left to the engineers in the Department of Transport- up to individual councils to advocate for this, no collaborative approach</li> <li>3. Misinterpretation between state government and council around the true intent of the MAR project. State government viewing this as a transport solution (investment in the train station &amp; platforms) whilst council seeing this as an investment in Sunshine</li> </ol> <p>Other good projects in Hobson’s Bay: expansion of Scienceworks &amp; creation of a wetlands biodiversity centre</p>	
	<b>16. Policy and governance</b>	Strategic planning & investment by councils prior to COVID-19 enhanced the quality of council responses to the pandemic (e.g. the expansion of parklet programs, street performances, outdoor cinema experiences)	Provision of government grants to keep businesses afloat & avoid widespread economic bankruptcy (JobKeeper, rent relief)

		<p>Dedicated engagement officer for small businesses &amp; start-ups</p>	<p>For government-owned entities, the Australian government's response was wonderful compared to foreign governments</p> <p>Various forms of support provided by councils:</p> <ol style="list-style-type: none"> <li>1. The implementation of simplified &amp; flexible processes to facilitate business adaptability (e.g. quick approval of outdoor dining licences &amp; liquor licences (through the Gaming Commission); approval of planning permits without the need to advertise to residents; provision of picnic tables, chairs, &amp; micro-grants (for website development) to CALD businesses)</li> <li>2. Councils contacting individual businesses &amp; also providing weekly updates &amp; information regarding grants, etc.</li> <li>3. Training provision, free marketing/legal/financial advice to business owners, &amp; free marketing campaigns profiling businesses</li> <li>4. Waiver of permit fees and free signs to businesses</li> <li>5. Dedicated business support officer who is fluent in Vietnamese so as to communicate with Vietnamese-speaking business owners</li> </ol>
	<p><b>17. Family and community support and positive stakeholder relationships</b></p>	<p>Social capital of businesses – in the form of cooperative relationships &amp; flexibility with business partners (e.g. contractors, franchisees, tenants)</p> <p>Local business collaborations (e.g. wedding planners sourcing flowers from neighbouring shop)</p>	<p>Businesses leveraging social capital to implement COVID responses &amp; supporting business partners</p> <p>Family &amp; friend support enabled some business owners to balance work and domestic chores and alleviate mental health issues</p>



			<p>Community support as a source of resilience for some micro &amp; small businesses (e.g. locals purchasing vouchers from cafes to help them remain solvent). "Support local businesses' mindset grown, especially when the 5KM radius travel restriction was in place</p> <p>Strong relationships of some businesses with councils and trader associations, and extensive support resulting therefrom</p>
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