VICTORIA UNIVERSITY
MELBOURNE AUSTRALIA

THE NEW WAY TO DO UNI

RESET REPORT 4

Resilience and recovery roadmap report in Melbourne's West

June 2022

CONTENTS

Acronyms

CALD   Culturally and Linguistically Diverse

CBD   Central Business District (Melbourne)

LGA   Local Government Authority

MAR   Melbourne Airport Rail

VTIC   Victoria Tourism Industry Council

VU   Victoria University

WMT   Western Melbourne Tourism Inc.

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

FOREWORD

We are pleased to release this report which has been produced in collaboration with Western Melbourne Tourism Inc. (WMT), and Victoria Tourism Industry Council (VTIC). This is the fourth and final report for the RESET (Resilient Enterprises and Sustainable Employment in Tourism) project.

Given its reliance on human mobility, the visitor economy is highly vulnerable to natural disasters and shocks such as those delivered by the COVID-19 pandemic. While the capacity of the sector to 'bounce back' is considerable, COVID-19 has proven to be a graver and more pervasive shock than others. In Victoria, the impact has been more pronounced due to prolonged lockdowns and tighter restrictions compared to other Australian states. Government's financial relief and decisive actions have unquestionably limited the damage for employees, businesses and communities. However, each region has been affected differently and Melbourne's West has been hard-hit due to the impact of border closures

on visiting friends and relatives, international education and business travel. Further, government spending on recovery has been largely focused on regional Victoria and Melbourne CBD, leaving regions like Melbourne's West more vulnerable.

At the same time, there are substantial opportunities for industry development due to planned transport infrastructure spending in the region and forecast population growth. The opportunities to leverage these developments to support visitor economy growth need to be planned for.

This report highlights pressing and interrelated issues that need both immediate actions and long-term strategic planning. These are: acute skills and labour shortages; a need to understand and support the business capability of the many ethnic and smaller businesses that operate in the region; and infrastructure, marketing and planning gaps created by years of underinvestment and disjointed planning.

Dr Joanne Pyke

Dr Ancy Gamage

Acute skills and labour shortages

What we found:

- Acute labour shortages negatively affect businesses' ability to operate and remain competitive.

- Pre-COVID factors that limit the labour pool include poor industry image; unappealing employment conditions; and the cash economy.

- COVID-induced factors that contribute to the labour crisis are border closures and high business reliance on secondary labour markets; employment opportunities in more lucrative and stable sectors; government support payments; and virus transmission and absenteeism.

- Organisational cultures characterised by positive relationships, employee recognition and reward, and workplace inclusion are central to workforce attraction and retention and organisational resilience.

Some recommendations include to:

- Support businesses to build leadership and human resource management capabilities so as to attract and re-engage employees from diverse cohorts.

- Establish a Visitor Economy Jobs Advisory body to consider short, medium and longer term skills requirements of the industry at a national, state and regional level.

- Formulate tailored workforce plans for Melbourne's West.

- Develop workforce skills and capabilities through visitor economy training and traineeship and apprenticeship programs.

- Invest in a skills and employment platform specifically targeted to Melbourne's West.

Lack of business capability and mental health challenges

What we found:

- The limited digital literacy and presence of micro, small and ethnic businesses is a major characteristic of businesses in Melbourne's West. Similarly, not-for-profit entities have limited resources to upgrade their digital infrastructure.

- Businesses which are reliant on mobility and physical interactions for their operations (e.g. retail travel agents, accommodation and events and catering) have little capacity to pivot to e-commerce or change their business models during a crisis.

- Small businesses and 'Food and Beverage' businesses commonly have no risk management plan, and are therefore less resilient.

- During the pandemic, employees and employers experienced significant mental health pressures for a range of reasons, including financial stress, business and property losses, social isolation, work-life balance struggles, and antagonistic customers.

- The pandemic has opened up opportunities for some businesses to streamline their activities and engage in strategic marketing.

Some recommendations include to:

- Review digital adoption and capabilities in micro, small and medium business in Melbourne's West.

- Develop business capability (digital, risk management and people management capabilities) through training, coaching and mentoring programs. Programs need to be offered in key languages (such as Vietnamese, Mandarin and Arabic) and contextualised to address businesses' specific needs.

- Raise awareness around the importance of and strategies for business diversification.

- Provide additional financial support to not-for-profit organisations to allow investment in digital technologies.

- Work with ethnic communities and businesses to improve mental health awareness and access to mental health services.

Infrastructure, marketing and destination management planning gaps

What we found:

- Melbourne's West has an image problem. It is widely viewed as an industrial district rather than as a place to visit. Factors that contribute to the region's poor image include the low visibility of tourism attractions, limited 4-star accommodation, inadequate infrastructure and neglect of infrastructure maintenance.

- Due to its proximity to Melbourne CBD, the destination attracts day trippers with low visitor spend.

- Inadequate collective destination marketing efforts of businesses undermine the destination's competitive advantage.

- Low consumer confidence to travel, high costs of travel insurance, and reputational damage suffered due to Melbourne's extensive lockdowns have generated additional travel barriers.

- Fragmented destination planning and the absence of a cohesive vision for the region has emerged as key vulnerability.

- The destination's multiculturalism and strong communities, vibrant heritage, population growth and natural assets contribute to business and destination resilience.

- Forthcoming regional development projects (e.g. accommodation investments and the Melbourne Airport Rail infrastructure project) have the potential of attracting business investment and visitation.

Some recommendations include to:

- Implement a Destination Management Plan anchored by collaborative and coordinated planning of visitor economy stakeholders across the six LGAs of Melbourne's West.

- Develop tourism products and invest in a robust marketing campaign that incorporates the night-time economy, a strong calendar of events and festivals, and government-funded voucher schemes dedicated to Melbourne's West.

- Increase the visibility of tourism attractions through effective signage and by supporting businesses to enhance their brand and marketing strategies.

- Embrace a strategic focus on visitor economy opportunities associated with the Melbourne Airport Rail (MAR) infrastructure project.

Never waste a good crisis

The pandemic is a wake-up call and an opportunity to take a fresh look at issues which have slowed the potential of the visitor economy in Melbourne's West over time. It would be a wasted opportunity to return to a 'business as usual' mindset once the aftermaths of the crisis are gradually brought back under control. The outcomes of this study highlight the need for government (local, state and federal), businesses, industry associations and other key stakeholders to work together to reimagine the visitor economy and make Melbourne's West more resilient in the interests of jobs growth, economic recovery and community wellbeing. A strong visitor economy is a vital element of the region's future as a thriving place to live, work, study and visit.

Dr Joanne Pyke

**Director,
School for the Visitor Economy**

Dr Ancy Gamage

Research Fellow

RECOMMENDATIONS SUMMARY

RESET ROADMAP RECOMMENDATIONS TO ENHANCE THE RESILIENCE OF THE VISITOR ECONOMY IN MELBOURNE'S WEST

Rebrand and Reconnect Action Area: Skills and Labour		Modernise and Support Action Area: Business Capability Development		Legitimise and Plan Action Area: Destination Marketing, Infrastructure and Planning	
Objective To raise employment standards and rebrand the visitor economy as an employer of choice	**Objective** To increase business capacity to access a skilled and stable workforce pipeline	**Objective** To enhance the digital, risk management and people management capabilities of businesses in Melbourne's West	**Objective** To build a crisis resilient workforce through culturally responsive mental health systems	**Objective** To improve the image of Melbourne's West as a destination of choice	**Objective** To develop a coordinated strategy that drives visitor economy development in the region
Immediate Priorities ◆ Establish a Visitor Economy Jobs Advisory body to consider skills requirements of the industry at national, state and regional levels. ◆ Market and deliver rapid, low-cost and customised skills training programs to improve workforce capabilities. ◆ Encourage employees to return to work through protective health measures and incentives like signing bonuses and tax concessions.		**Immediate Priorities** ◆ Undertake a review of digital adoption and capabilities in micro, small and medium businesses in Melbourne's West, inclusive of exploring barriers to digital adoption. ◆ Promote and extend existing support measures and resources to help businesses go digital (e.g. the Small Business Digital Adaptation program and VTIC's Tourism Digital BizKeeper Program).		**Immediate Priorities** ◆ Implement a Destination Management Plan which will represent a blueprint for a collaborative approach to development, management and marketing within the six LGAs of Melbourne's West.	
Long Term Strategies ◆ Educate and train businesses on how to future proof their talent supply through HRM practices that reconcile business and employee needs. ◆ Expand talent pools by activating latent domestic cohorts (e.g. older workers, people from CALD backgrounds, people with disabilities and first nations people) and attracting international students back to Victoria. ◆ Invest in a skills and employment platform specifically targeted to Melbourne's West.		**Long Term Strategies** ◆ Develop business capability programs that drive diversification and product innovation. ◆ Promote training, mentoring and coaching programs that enhance digital, risk management and leadership skills of micro, small and CALD businesses. ◆ Working with ethnic communities to raise awareness of mental health problems and ways to access mental health support.		**Long Term Strategies** ◆ Invest in a robust marketing campaign anchored on a strong events calendar and a night-time economy. ◆ Develop quality and innovative products that attract high-yield visitors. ◆ Encourage investment in infrastructure development, e.g. MAR project orientation on visitor economy opportunities, greater supply of visitor economy accommodation, transport connectivity and accessibility, and Avalon Airport strategic repositioning.	

INTRODUCTION

The place-based nature of tourism and its dependence on mobility make the tourism, hospitality and events industry vulnerable to risks and disasters. In the past, the industry has weathered crises with remarkable resilience. However, the COVID-19 pandemic has been unprecedented in terms of the magnitude and length of disruption faced by businesses. Consequently, the Victorian government and key tourism stakeholders have mobilised to manage the crisis and revitalise the industry and its workforce. Within this context, the RESET (Resilient Enterprises and Sustainable Employment in Tourism) project was established, in collaboration with Western Melbourne Tourism Inc. (WMT), and Victoria Tourism Industry Council (VTIC), to support the recovery and transformation of the visitor economy in Melbourne's West. The project was implemented as part of the wider 'VU RISE' project funded by the Victorian State Government through the Higher Education Investment Fund.

The region of Melbourne's West comprises of six Local Government Authorities (LGAs) namely: Melton City Council, Brimbank City Council, Moonee Valley City Council, Maribyrnong City Council, Wyndham City Council, and Hobsons Bay City Council. The area spans across the traditional homes of the Wurundjeri Woi Wurrung (Brimbank, Maribyrnong, Melton and Moonee Valley), the Wathaurong (Moonee Valley and Wyndham) and the Yalukit-Willam Boon Wurrung (Hobsons Bay) peoples of the Kulin Nation (Lindsay-Smith et al., 2021b). A map of the region is provided on the following page[1].

Recent data demonstrate the disastrous impact of the pandemic on visitation and visitor spend in the region. Compared to 2019 visitation levels, Melbourne's West experienced a decline of a cumulative 5.1 million visitors. Compared to 2019 levels, visitor spend was also down by a cumulative $2.7 billion (across the period 2020 and 2021) (Western Melbourne Tourism Inc. and Urban Enterprise, 2022)[2].

The RESET project is underpinned by a multilevel destination resilience framework – the 'modified Destination Resilience Framework' (Pyke et al., 2021). A detailed explanation of the framework can be accessed from its corresponding academic paper. The project encompasses a series of reports that support a holistic understanding of Melbourne's West as a tourism destination. RESET Reports No. 1 and 2 provided an overview of the characteristics and skill needs of the region (Lindsay-Smith et al., 2021b, Lindsay-Smith et al., 2021a). RESET Report No. 3 highlighted key qualitative and quantitative findings on the implications of the pandemic on tourism businesses and Melbourne's West (Gamage et al., 2022). The full suite of RESET reports can be accessed from the Victoria University website[3].

RESET report No. 4 has two objectives. First, it presents findings relating to business and destination vulnerability/resilience in Melbourne's West. Second, it uses an evidence-based approach to construct a roadmap for the long-term recovery and sustainable growth of the industry in Melbourne's West.

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[1] Source: WMT

[2] Source: National and International Visitor Survey, Tourism Research Australia (TRA), 2017 to 2021 Year Ending December. Visitor Expenditure Impacts have been sourced from TRA via REMPLAN. Expenditure Impacts are based on application of average expenditure per daytrip/nights applied to loss of visitor daytrips/nights which may include expenditure outside of the Western Melbourne region.

[3] vu.edu.au/vu-rise-recover-innovate-sustain-evolve/jobs-skills-hub/resilient-enterprises-sustainable-employment-in-tourism-reset

NORTH

Key Visitor Precinct

PINK NAME

Suburb
Essendon

Destination
Scienceworks

Shared Path
Not all shown

Ferry Route

Visitor Info Centre

Birdwatching

Sunshine

Train Line & Station
Not all shown

PORT PHILLIP BAY

HOBSONS BAY

WYNDHAM

MELTON

BRIMBANK

MOONEE VALLEY

Melton Waves
Melton Library
Melton Health
MELTON

Melton Valley Golf Course
Willows Historical Park
Hannah Watts Park
Melton Botanic Garden

Witchmount Estate Winery
Galli Estate Winery
International Paintball Australia

Organ Pipes National Park

Melbourne Airport

Proposed Airport Rail link

Calder Park

Plumpton

Hillside

Bonnie Brook

Brookfield

Melton Reservoir

Exford

TOOLERN CREEK TRAIL

Tabcorp Park

Cobblebank

Future Metro Activity Centre

Toolern Creek

Toolern Creek Regional Park

Rockbank

Aintree

MELTON

Melton South

Eynesbury

Eynesbury Homestead
Eynesbury Golf Course

Western Grassland Reserve

Mount Cottrell

Melton Rail

OMR Rail

OMR Outer Metropolitan Ring Road

Truganina

Western Grassland Reserve

Tarneit

Tarneit

Hoppers Crossing

Wyndham Vale

Wyndham Vale

Werribee River

Presidents Park

Werribee Adventure Playground

WERRIBEE

WERRIBEE RIVER TRAIL

Werribee

Werribee Racecourse

B24 Liberator Memorial

Wyndham Cultural Centre

Werribee River Park

Geelong Avalon Airport

Werribee Park Golf Club

Werribee Park Precinct

Werribee Park & Mansion
Victoria State Rose Garden
National Equestrian Centre
Shadowfax Winery

RAAF Williams Point Cook Base

RAAF Museum

WERRIBEE SOUTH WYNDHAM HARBOUR

Bird Hide

Point Cook Coastal Park

Point Cook Homestead

Point Cook Marine Sanctuary

Sanctuary Lakes Golf Club

Truganina Reserve

SKELETON CREEK TRAIL

POINT COOK

Werribee Health and Education Precinct

Pacific Werribee Plaza

Riverbend Historic Park

Hoppers Crossing

Williams Landing

Williams Landing

Laverton

Laverton North

RAAF Williams Laverton Base

FEDERATION TRAIL

William Angliss Native Grassland

Regional Rail Link

Derrimut Grassland

Sunshine Golf Club

WESTERN RING RD TRAIL

HV McKay Gardens

Sunshine

SUNSHINE

Little Vietnam

Quang Minh Temple

Victoria University

Black Powder Mill

Ginifer

St Albans

ST ALBANS

The Bowery Theatre
Big SAMs Market

Victoria University

Deer Park

Deer Park

Ardeer

Albion

Caroline Springs

CAROLINE SPRINGS

Burnside Heights

Lake Caroline

Delahey

Keilor Plains

Keilor Downs

Taylors Hill

Taylors Lakes

Watergardens
Sydenham

Sunbury Line

Maribyrnong River

Green Gully Reserve

Keilor North

Keilor Park

Overnewton Castle

Keilor Hotel

Brimbank Park

Airport West

Essendon Fields

Niddrie

Strathmore

Essendon

Glenbervie

Essendon

CityLink

Craigieburn Line

Upfield Line

M80

M80 Upgrade

MARIBYRNONG RIVER TRAIL

MARIBYRNONG RIVER TRAIL

The Incinerator Gallery

The Boathouse Restaurant

Moonee Ponds

MOONEE PONDS

PUCKLE ST

UNION RD

Ascot Vale

The Clocktower Centre (Theatre)
Moonee Valley Racecourse

Melbourne Showgrounds

Showgrounds

Footscray Park

FOOTSCRAY

Whitten Oval

West Footscray

Footscray Market

Footscray

Footscray Community Arts

Heavenly Queen Temple

Seddon

Yarraville

San Theatre

YARRAVILLE

Spotsword

Port of Melbourne

North Melbourne

Southern Cross

Flinders Street

MELBOURNE

Ferry: Southgate to Spotswood (Scienceworks) & Williamstown

Westgate Tunnel Approx Alignment

Newport Lakes

SPOTSWOOD

NEWPORT

Newport

The Substation

Newport Railway Museum

BAY TRAIL

Scienceworks

Grazland

Cherry Lake

North Wtn

ALTONA

Westona

Altona

Seaholme

Altona Coastal Park

Altona Beach

Wtn Beach

WILLIAMSTOWN

Williamstown Beach

Seaworks/ Williamstown

Point Gellibrand Coastal Heritage Park

Gem Pier
HMAS Castlemaine
Heritage Precinct
Seaplane
Seaworks Maritime Precinct
Williamstown Historical Museum

Jawbone Marine Sanctuary
Williamstown Botanic Gardens

HOBSONS BAY

Station Pier

BAY TRAIL WEST

LAVERTON CREEK TRAIL

BAY TRAIL

The 100 steps of Federation

Altona Pier
Logan Reserve
Altona Homestead

Cheetham Wetlands

Woods St Art Space

Melbourne Ballpark

Kororoit Creek

Aircraft

Kororoit Creek

Map by Visualvoice. Data sources: Data.vic.gov.au, VicMap, DELWP, PTV

0   5   10 Kilometers

METHODS

The RESET project applied a mixed research methods approach. In addition to a desk review which fed into the development of the research design, primary data was collected as listed below. A detailed explanation of the research methodology and participant attributes can be sourced from RESET Report No. 3 (Gamage et al., 2022) .

1. An online survey was administered to business owners and managers from 1st September to 8th December 2021. A total of 275 responses were received from businesses located in Melbourne's West.

2. In-depth interviews were conducted online with a cross-representative selection of stakeholders (n=33). Stakeholders came from a range of expertise and sectors to capture the complexity of the pandemic. This sampling strategy also allowed for data triangulation (Yin, 2014).

3. Stakeholder consultation and validation of findings were undertaken during a workshop on 6th April 2022 (n=14). Focus group discussions of stakeholders informed the principles of the roadmap.

The RESET project employed a co-design approach to produce meaningful outcomes. This approach consisted of ongoing engagement with tourism stakeholders (industry associations, government, businesses, and employee representative) and empowering stakeholders to collectively identify policies and response measures for industry recovery and growth.

Interview participants

n = 33
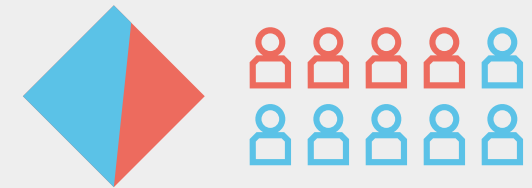
GENDER
19 male, 14 female

IDENTIFIED AS		
ENGLISH SPEAKING 23 PARTICIPANTS	CALD 9 PARTICIPANTS	INDIGENOUS 1 PARTICIPANT
State government officials	◆◆	2
Local government officials	◆◆◆◆◆◆◆◆	8
Industry body representatives	◆◆◆	3
Not-for-profit organisations	◆◆	2
Government-owned organisations	◆◆	2
Private organisations	◆◆◆◆◆◆◆◆◆◆◆◆◆	13
Dual sector (government-owned & not-for-profit)	◆◆	2
Trade union representative	◆	1

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[4] vu.edu.au/sites/default/files/reset-report-3-western-visitor-economy-resilience-report.pdf

ACUTE FINANCIAL LOSSES

Shockwaves felt in the business environment

A decrease in revenue was reported by most businesses in Melbourne's West, with financial losses being more pronounced in Brimbank and Melton.

90% BRIMBANK

77% MARIBYRNONG

90% MELTON

71% WYNDHAM

78% HOBSONS BAY

56% MOONEE VALLEY

Interviewees (particularly micro and small business owners) articulated their economic stress on the basis of a reduction or a complete halt in business activities coupled with ongoing financial obligations (such as commercial rent and insurance payments). Indirect losses were also reported in the form of asset depreciation and warranty expiry on new assets which were never utilised due to lockdowns and prolonged periods of business inactivity. Although the federal and state governments introduced a range of assistance programs to cushion the impact of the crisis, small, micro, and 'Culturally and Linguistically Diverse' (CALD) businesses were disproportionately disadvantaged in their ability to access grants. This was partly attributed to the cash economy, language and digital literacy barriers, and low-quality tax reporting standards of these businesses (as exemplified by the quotes opposite).

As a result, some micro and small business owners were forced to take up alternative employment or seek financial assistance from family members to remain viable. Others sold their family homes or investment properties or even closed their business.

> "
> TO RECEIVE A LOT OF THOSE GOVERNMENT HANDOUTS, THERE WERE CRITERIA AROUND GST AND TAX PAYMENTS… THIS IS THE REALITY OF SMALL BUSINESSES, MANY OF US STRUGGLE TO DO OUR TAX ON TIME. AND WHEN WE'VE BEEN ASKED ALL OF A SUDDEN, YOU HAVE TO HAVE YOUR ENTIRE, GST AND PAYG ALL UP-TO-DATE BEFORE YOU CAN GET THE HANDOUTS, A LOT OF PEOPLE JUST COULDN'T CLAIM IT BECAUSE THE DETAILS WEREN'T UP-TO-DATE, AND THEY COULDN'T GET TO AN ACCOUNTANT OR THEY'RE OUT OF TIME… ANOTHER CONCERN AS WELL, BEING SMALL BUSINESSES, CAFES AND RESTAURANTS, LARGELY, THEY DO HIRE A LOT OF PEOPLE CASH-IN-HAND, OR THEY'RE HIRING INTERNATIONAL STUDENTS WHO ARE NOT ON THE BOOKS. THOSE PEOPLE COULD NOT APPLY FOR ANY FORM OF PAYMENT…
> "

(P13, President, industry body)

> "
> …PARTICULARLY MULTICULTURAL TRADERS THAT ARE NOT CONNECTED OR HAVE ENGLISH AS A SECOND LANGUAGE ARE NOT USED TO FILLING OUT ONLINE [GRANT] APPLICATIONS
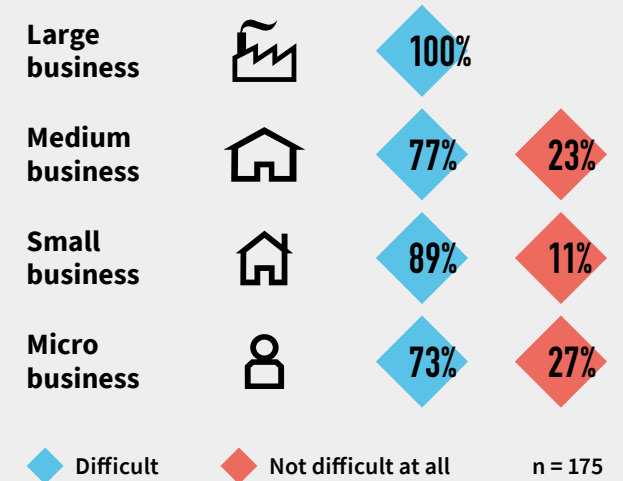> "

(P4, Coordinator, local government)

SEVERE SKILLS AND LABOUR SHORTAGES

The seasonal nature of tourism and the preponderance of micro and small businesses in the tourism and hospitality industry point to structural constraints for staff attraction and retention. Participants conceded that, even prior to COVID-19, the unappealing employment conditions in the industry (in the form of low pay, job insecurity, unsocial hours, limited career paths, and physically demanding work) generated high turnover rates. However, employers (especially micro and small businesses and a resource-poor not-for-profit entity) reported that pay increases were beyond their financial reach. From the trade union representative, the starting point for better employment conditions would be to reduce casualisation. Instead, the introduction of flexible work options, such as job sharing, was suggested to create a culture of stability and engagement.

Interestingly, a long-standing issue that was said to undermine the industry's image and employment standards is the cash economy. The common practice of paying cash-in-hand wages by many businesses reinforced the short termism of employment relationships and weakened worker loyalty to the industry. Businesses which observed employment regulations found it more difficult to attract and retain staff and generally maintain a competitive advantage compared to businesses that were non-compliant.

Undoubtedly, the pandemic exacerbated skills and labour shortages in the industry, with large businesses facing greater levels of difficulty in staff recruitment compared to micro businesses.

DIFFICULTY IN RECRUITING PERMANENT STAFF, BY FIRM SIZE

	Difficult	Not difficult at all
Large business	100%	
Medium business	77%	23%
Small business	89%	11%
Micro business	73%	27%

◆ Difficult ◆ Not difficult at all   n = 175

DIFFICULTY IN RECRUITING CASUAL STAFF, BY FIRM SIZE

	Difficult	Not difficult at all
Large business	87%	13%
Medium business	76%	24%
Small business	84%	16%
Micro business	58%	42%

◆ Difficult ◆ Not difficult at all   n = 182
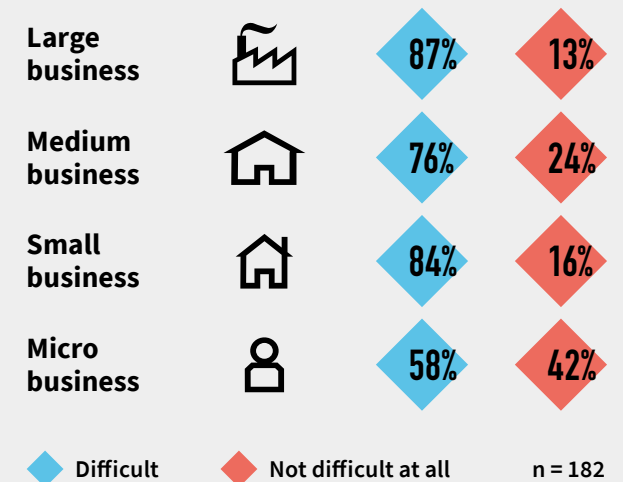
Several factors contributed to the labour crisis. Businesses' overwhelming reliance on workers from secondary labour markets (mainly international students and working holiday visa holders) meant that the supply of labour was instantaneously interrupted once international borders were closed. Employees also moved, possibly permanently, to more lucrative industries (e.g. construction, aged care and transport and logistics) which were still operational during lockdowns. Within this context, micro and small businesses were exposed to staff poaching by larger, better paying tourism and hospitality businesses. For organisations operating in the not-for-profit sector, the pandemic engendered the loss of critical skills and volunteer labour.

Furthermore, there was evidence of employees refusing to *officially* return to work for fear of losing government assistance payments, such as JobKeeper and COVID-19 Test Isolation payments. Reportedly, some employees requested 'cash-in-hand' shifts or extra payments in exchange for their written permission for employers to secure JobKeeper. This signals the active disengagement of some employees with their workplace and highlights issues with the design and administration of government assistance packages (as discussed later in this report – section *'policy and governance issues'*.)

In addition, high casualisation and worker mobility are associated with greater risk of virus transmission across businesses. Increased staff infections or individuals' self-isolation as a close contact can further accentuate staff shortages. Overall, labour shortages compelled organisations to turn down business and streamline their operations by scaling back their bookings, menus and opening hours. Businesses were equally willing to hire less experienced/qualified staff, and were prepared to invest time and resources in staff training (both on-the-job and other formal paid training).

> **"**
> SOME OF THE KEY EMPLOYEES WHO KNEW THAT WE HAD TO RETAIN THEM… THEY SORT OF STARTED BLACKMAILING US… MY EMPLOYEES WERE LIKE, 'I'LL SIGN THE CONSENT FORM ONLY IF YOU GIVE ME… 50% OF THE PAYMENT OF JOBKEEPER ON TOP OF WHAT I'M ALREADY GETTING', SO IT WASN'T SEEN AS A REFUND OF WHAT WE WERE PAYING THEM, BUT IT WAS SEEN AS AN ADDITIONAL PAYMENT
> **"**

(P23, Owner-manager, small business)

> **"**
> IT'S TOUGH…WITH SOME OF OUR HERITAGE OBJECTS, BECAUSE THERE'S A LOT OF LOST SKILLS THAT ONLY PEOPLE THAT SORT OF RETIREMENT AGE STILL RETAIN, THAT WE'RE RELYING ON… IT'S A REAL ISSUE, FINDING… A SUSTAINABLE POOL OF VOLUNTEERS WHO HAVE THE EXPERTISE TO WORK ON HERITAGE OBJECTS
> **"**

(P18, General Manager, dual sector organisation)

HIGH RISK EXPOSURE

The survey revealed differences in risk management cultures and approaches across the different categories of businesses in Melbourne's West. Risk management planning was more evident in large businesses and in the 'Attractions' sector. In contrast, small businesses and those operating in the 'Food and Beverage' sector lagged in terms of adopting a risk management plan.

Importantly, a positive correlation between risk management and business resilience was shown. Businesses with risk management plans were found to be relatively more resilient (composite score of 47.95 out of 65) compared to those without a risk management plan (composite score of 41.21 out of 65)[5]. This highlights the strategic imperative for businesses to consider their risk management planning capabilities in preparation for future disruptions.

[5]   A description of the survey analysis can be found in RESET Report No. 3.

PROPORTION OF BUSINESSES WITH RISK MANAGEMENT, BY SIZE

		With a risk management plan	No risk management plan
Large business		100%	
Medium business		94%	7%
Small business		57%	43%
Micro business		77%	23%

◆ With a risk management plan   ◆ No risk management plan

n = 210

PROPORTION OF BUSINESSES WITH RISK MANAGEMENT, BY SECTOR

		With a risk management plan	No risk management plan
Accommodation		82%	18%
Attractions		100%	
Food/Beverage		64%	36%
Tours/Transport		94%	6%
Events		94%	6%
Retail		74%	26%

◆ With a risk management plan   ◆ No risk management plan

n = 213

Given the novel nature of COVID-19, businesses were particularly attentive to government directives to make sense of their legal and compliance obligations and navigate the uncertain conditions. However, public health directives were often considered too onerous for various reasons.

Firstly, businesses were already under significant financial pressures, but were still expected to bear additional costs (e.g. the costs of appointing COVID Check-in Marshals) to make their premises COVID-Safe compliant.

Secondly, employers were mandated to check the vaccination status of their customers. This created high levels of discomfort among business owners who perceived this as an encroachment on individuals' personal lives. Staff and business owners were also tasked with differentiating between valid and fake vaccination certificates and medical exemptions. Of concern, there was ample evidence of staff and employers being abused by antagonistic customers, and businesses being exposed to loss of customers and negative online reviews. Consequently, many employers questioned the fairness and modus operandi of this measure. In any case, employee abuse seemed to contribute to the exodus of workers from the industry. On a positive note, business investment in conflict management training for staff was associated with workforce resilience and employee ability to deal with difficult customers.

Thirdly, preventing unvaccinated ethnic customers from accessing business premises proved to be a conundrum for some CALD business owners. As one participant explained, shared meals represent the essence of unity in the African diasporic community. As such, the refusal to serve customers is perceived as culturally inappropriate by some businesses. Customers from some ethnicities also seemed to oppose the disclosure of their vaccination status due to their experiences of oppressive government systems in their home country.

" PUTTING THE ONUS ON A BUSINESS TO BE CHECKING VACCINATION RECORDS AND HAVING THE COMMUNITY BACKLASH ON US, BECAUSE THEN WE'RE RESPONSIBLE, THE GOVERNMENT'S NOT RESPONSIBLE. I THINK THAT'S REALLY UNFAIR TO PUT US IN THAT POSITION. WE'RE NOT THE POLICE… THE CONFLICT THAT WE HAVE SEEN HAS BEEN REALLY GUT WRENCHING "

(P25, Owner-manager, small business)

" I WAS FEELING SICK IN MY STOMACH EVERY TIME I HAD TO ASK FOR THAT (PROOF OF VACCINATION)… OUR CUSTOMERS… COME FROM COUNTRIES WHERE THE GOVERNMENT HAS TOO MUCH POWER ON THE PEOPLE… CUSTOMERS DIDN'T WANT TO CHECK-IN BECAUSE THEY FELT THAT WAS THE GOVERNMENT CHECKING ON THEM… SOME OF THEM MIGHT NOT BE AWARE OF THIS RULE LIKE 'IF I'M NOT DOUBLE-VAXXED, I CAN'T COME INSIDE THE RESTAURANT'… SOME OF THEM JUST DON'T UNDERSTAND THE CONCEPT BECAUSE IT'S… NOT IN THE CULTURE… (OUR CULTURE IS) DEFINITELY FAMILY-ORIENTED AND FRIENDS-ORIENTED. YOU DON'T EAT BY YOURSELF IN AN ETHIOPIAN CULTURE. EVEN IF YOU DON'T KNOW SOMEONE AND YOU'RE HAVING A MEAL, YOU WILL TELL THEM COME AND SHARE MY MEAL. TO REFUSE SOMEONE TO COME AND EAT IS COMPLETELY WRONG "

(P20, Owner-manager, micro business)

LOW BUSINESS ADAPTABILITY AND DIGITAL CAPABILITY

Beyond risk management planning (already discussed), interviewees identified other factors that prevented businesses from adapting to sudden and drastic changes occurring in their operational and regulatory environments. Some businesses were not able to migrate to e-commerce settings and were therefore extremely disadvantaged and isolated by lockdowns and other forms of movement restrictions. For example, due to their nature, businesses like retail travel agents, accommodation, and events and catering businesses could not readily pivot to e-commerce. Other businesses, like micro, small and CALD businesses, were reportedly not confident in using digital technology and had limited digital presence and literacy. These businesses struggled to access digital information, market their products online and engage with e-government services and financial support. CALD businesses faced an extra layer of complexity in accessing ethnic customers online, with this market being seen to largely prefer physical shopping experiences. Additionally, delays in permit processing by some state agencies were seen to limit businesses' ability to pivot in a timely manner.

It appeared that not-for-profit organisations faced additional challenges in a digital setting. Evidence of this came from one senior manager who highlighted the difficulty of showcasing not-for-profit values and impact through online advocacy interactions. This respondent further explained how not-for-profits are financially constrained from strengthening their digital infrastructure (e.g. connectivity, digital tools and IT devices), thereby undermining their ability to innovate and fulfil their mission effectively.

> " THE MULTICULTURAL TRADERS, SOME OF THOSE ONES, WHICH WE HAVE A LOT OF DIVERSITY IN OUR CITY… THEY RELIED HEAVILY ON THEIR COMMUNITIES, USING THE BRICKS AND MORTAR — ENTERING THE BUSINESS PHYSICALLY. SO THEY PROBABLY STRUGGLED EVEN MORE BECAUSE THEY DIDN'T QUITE HAVE THAT MODEL TO PIVOT TO AN ONLINE SERVICE "

(P4, Coordinator, local government)

> " ONE OF THE HARDEST THINGS FOR A PLACE LIKE US IS THE IMPACT… WE'LL INVITE VIPS OR GOVERNMENT REPRESENTATIVES. WHENEVER WE GET SOMEONE TO THE PRECINCT AND THEY HAVEN'T BEEN BEFORE, THEY ARE IN LOVE WITH IT. THEY'RE LIKE, 'OH, MY GOD',… AND THAT FOR US IS VERY POWERFUL, BECAUSE THEN WE CAN SECURE THEIR SUPPORT AND ADVOCACY. SO NOT HAVING THAT MEANS WE HAVE TO WORK A LOT HARDER TO TALK ABOUT OUR IMPACT BECAUSE WE'RE TRYING TO RAISE INVESTMENT IN THE PRECINCT. AND NOT BEING ABLE TO CONNECT THAT TO THE PLACE IS VERY DIFFICULT. BECAUSE IT'S ALL JUST THEORETICAL UNTIL YOU SEE IT HAPPENING. OUR PLACE IS OUR BIGGEST ASSET APART FROM OUR TEAM, SO NOT BEING ABLE TO ACCESS IT AND BRING PEOPLE ON THAT JOURNEY IS QUITE DIFFICULT "

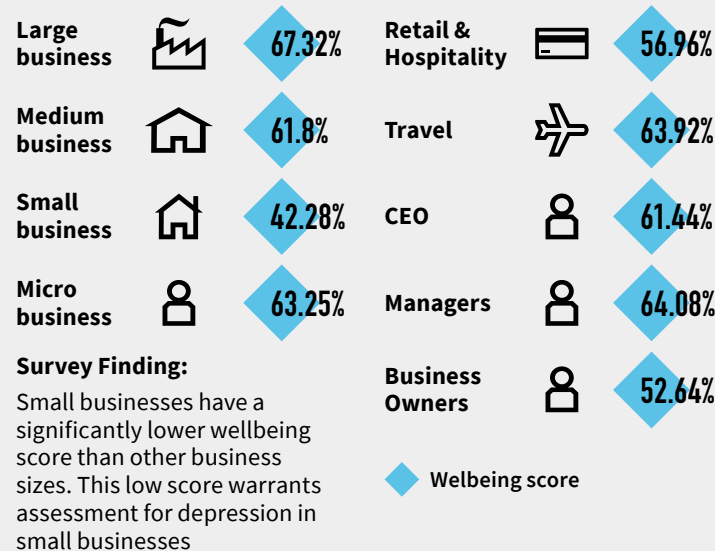(P14, Executive Director, not-for-profit organisation)

LOW WELLBEING

Consistent with previous research (Lindsay-Smith et al., 2022), this project shows that the pandemic has generated significant mental health challenges by amplifying stress and anxiety. In the case of employees, low wellbeing was fuelled by income/job losses or the ongoing fear of losing employment, financial stress, social isolation, lack of purpose due to prolonged periods of inactivity, amongst others. Likewise, the poor health outcomes for employers stemmed from acute financial pressures and loss of business, family homes and investment properties, environmental volatility and fear of future variants, work-life balance struggles (especially for those home-schooling and caring for young children), and excessive working hours for those trying to salvage their business. Unfortunately, barriers to accessing mental health support were equally noticeable. These include the lack of awareness around the type of support available, lengthy waitlists, and stigma surrounding mental health.

Interestingly, differences in wellbeing across business size, business type and respondent role were shown from the survey[6]. Small businesses, 'Retail and Hospitality' businesses and business owners reported lower wellbeing scores compared to others. Survey respondents also rated 'mental health and wellbeing skills' as the most critical leadership skill set to be developed in the next 12 months. These findings indicate the need for tailored approaches in mental health strategies, interventions and capacity building in the industry.

WELLBEING SCORE OF BUSINESSES

Large business	67.32%	Retail & Hospitality	56.96%
Medium business	61.8%	Travel	63.92%
Small business	42.28%	CEO	61.44%
Micro business	63.25%	Managers	64.08%
		Business Owners	52.64%

◆ Welbeing score

Survey Finding:
Retail & hospitality sectors have a lower wellbeing score compared to the Travel sector

Survey Finding:
Small businesses have a significantly lower wellbeing score than other business sizes. This low score warrants assessment for depression in small businesses

Survey Finding:
Business owners reported the lowest wellbeing score compared to managers and CEOs

> WE DID A SURVEY WITH ABOUT MAYBE ABOUT 1000 WORKERS LAST YEAR [2020] AND 91% INDICATED THEY WERE WORRIED ABOUT MENTAL HEALTH... PEOPLE WERE PLUNGED INTO POVERTY OVERNIGHT... 94% OF TEMPORARY VISA HOLDERS LOST THEIR JOBS, OR ...HAD THEIR HOURS CUT... ALMOST 50% OF WORKERS DIDN'T HAVE ENOUGH SAVINGS TO COVER A MONTH OF BASIC EXPENSES, ABOUT A THIRD FELL BEHIND IN THEIR BILLS, 2% HAD TO ACCESS THEIR SUPER... 12% HAD TO ACCESS A FOOD BANK OR CHARITY... AND THIS WAS SUPERCHARGED BY INSECURE WORK. PEOPLE WHO WERE OCCASIONALLY EMPLOYED SUDDENLY HAVE NOTHING TO FALL BACK ON, THEY HAVE NO ACCRUED LEAVE. AND THEY OFTEN HAVE NO ACCRUED SAVINGS... THERE WAS A PERFECT STORM

(P33, Manager, trade union)

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6   A description of the survey analysis can be found in RESET Report No. 3.

7   According to the World Health Organization, a score below 50 out of 100 indicates poor wellbeing and is an indication for testing for depression.

FINANCIAL RESILIENCE

Weathering the storm – some evidence of business resilience

Certain organisational traits and environmental factors were found to foster business resilience. From a financial perspective, organisations managing to free up cash flows were in a better position to deal with the economic downturn. This was particularly the case for businesses with cash reserves, government-owned businesses with immediate access to government funds, and businesses with diversified revenue streams.

Another factor that enhanced the economic responses of businesses was the provision of financial assistance packages by federal and state governments. Some examples of government support include the Small Business Digital Adaptation grant (state level), the Commercial Tenancy Relief scheme (state level) and JobKeeper (federal level). Nonetheless, shortcomings in grant administration processes were equally noted. This point is further discussed in section *'policy and governance issues'*.

Businesses with a strong brand and loyal membership base were relatively more successful in buffering financial losses. In micro and small firms, business brand and resilience were intricately linked to the business owner's leadership, psychological resilience, passion, and emotional connections with customers.

" WE'VE BEEN SUPER LUCKY. AND WE WILL BE THE OUTLIER IN YOUR RESEARCH, I THINK, BECAUSE WE'RE A GOVERNMENT AGENCY. WE'VE BEEN INCREDIBLY WELL SUPPORTED BY GOVERNMENT THROUGH THE LOCKDOWNS "

(P18, General Manager, dual sector organisation)

" A LOT OF IT HAS TO DO WITH YOUR REPUTATION AND WHAT YOU PRIDE YOURSELF ON. AT THE START OF THE PANDEMIC, BUSINESSES THAT WEREN'T DOING WELL, IT WAS… A WAY TO GET OUT OF THE INDUSTRY… A LOT OF PEOPLE COME INTO THIS GAME, AND THEY EXPECT TO MAKE A FEW COFFEES, HAVE A LAUGH, AND THAT'S WHAT IT'S ALL ABOUT. BUT IT'S A VERY, VERY, TOUGH INDUSTRY. AND ONLY THOSE WHO ARE GENUINELY PASSIONATE ABOUT WHAT THEY DO HAVE SORT OF SURVIVED… WHEN YOU'RE PASSIONATE, YOU GO OVER AND ABOVE OF WHAT'S EXPECTED… SO WE'VE BUILT THIS SORT OF COMMUNITY OVER THE LAST 3 YEARS, WHICH WASN'T JUST ABOUT THE FOOD… IT WAS MORE ABOUT GETTING TO KNOW PEOPLE ON A PERSONAL LEVEL, AND REALLY CARING ABOUT OUR CUSTOMERS "

(P26, Owner-manager, small business)

BUSINESS ADAPTABILITY AND RISK MITIGATION

Some businesses adjusted their business model in line with evolving environmental conditions. For instance, it was common for hospitality businesses to seamlessly shift to take-out models of service. One restaurant and catering business diversified its product base by packaging and virtually marketing high tea boxes. Within the accommodation sector, one interviewed hotel repositioned its strategy to house essential workers. This proved to be an effective strategy for this organisation. Sadly, not all accommodation providers enjoyed the same level of success. Other hotels, which were converted into quarantine facilities, were said to be exposed to negative media portrayal and reputational damage because of COVID spreading to the community.

> "
> WHEN THE NEWS WERE TALKING ABOUT A PARTICULAR HOTEL…IT RUINED THEIR REPUTATION. THAT WAS COMPLETELY WRONG, WHAT THE MEDIA DID, BECAUSE IT WASN'T THE PROPERTY'S FAULT… PEOPLE WILL FIND IT HARD TO GO BACK IN THOSE PROPERTIES. SO WE DIDN'T TAKE ANY QUARANTINE… WE ALL AUTOMATICALLY SWITCHED GEARS AND BEGAN TO HUNT FOR ESSENTIAL WORKERS… SO ALL OF THE CONSTRUCTION FOLKS WERE STILL TRAVELING AND WORKING. AND WE BEGAN TO SUPPORT THEM… SO IT WAS REALLY MUCH ABOUT ADAPTING AND EVOLVING TO SEE WHAT WAS OUT THERE AND WHAT WE COULD DO. WE ALSO WORKED WITH THE GOVERNMENT… WE NEGOTIATED CONTRACTS WITH THE GOVERNMENT TO HOUSE DOCTORS AND NURSES THAT WEREN'T HIGH COVID RISK, BUT NEEDED A PLACE TO STAY AS A BREAK BEFORE THEY WENT HOME BECAUSE THEY WERE DOING EXTRAORDINARY SHIFTS
> "

(P29, General Manager, medium business)

A few businesses were able to leverage technology to support their operations and product offerings. The level of sophistication in technology adoption differed across businesses. For example, larger attraction businesses significantly invested in digital experiences and online ticketing systems and hospitality businesses implemented online ordering systems.

Business adaptability was also reflected through the risk mitigation strategies of businesses. In response to employees' poor health outcomes, businesses introduced a range of mental health initiatives. Whilst 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.

For some businesses, the pandemic has facilitated strategic insights into business processes and priorities and opened up opportunities for more streamlined activities and productivity gains in the future. For example, video-conferencing interactions with employees and customers were said to increase work efficiency and support market expansion to other Australian states and countries. For another interviewee, amending their restaurant's opening hours enhanced business efficiency, decreased labour costs, and safeguarded the business against revenue losses.

WORKFORCE RESILIENCE

Despite the negative image of the industry as a poor employer (see above section *'severe skills and labour shortages'*), there were reports of businesses embracing best practices in terms of job design, reward and diversity management, and workplace health and safety. Those businesses with people-oriented cultures – characterised by positive and fun work environments, employee recognition and rewards, fair and respectful relationships, and workplace inclusion – were likely to nurture employee commitment, positive attitudes and motivation to return to work. Employee commitment was apparent from reports of workers performing tasks outside of their job description and behaving proactively to fulfil business needs.

The survey data[8] further confirmed the importance of people-oriented cultures and workplace inclusion in attracting and retaining staff and building organisational resilience.

" AS EVERYONE, WE DID ONLINE ORDERING, CATERING. EVERYONE LEARNED NEW SKILLS THROUGH THAT TIME. THAT WAS A REALLY AMAZING ACHIEVEMENT BECAUSE, WHEN YOU'RE TAKING STAFF THAT NORMALLY WORK MONDAY TO FRIDAY, NINE TO FIVE, OR SHIFTS THAT ONLY WORK IN A KITCHEN, AND THEN NOW DOING SECURITY, ROSTERING, HOUSEKEEPING, DRIVING A BUS FOR FOOD DELIVERY, YOU KNOW, HATS OFF TO THEM JUST TO STAY EMPLOYED "

(P17, General Manager, dual sector organisation)

Survey Finding:

Businesses with positive organisational cultures are less likely to face difficulty in recruiting casual and permanent staff.

Businesses with positive organisational cultures are more confident in their ability to attract and retain staff in the next 12 months[9].

Survey Finding:

Businesses which rate workplace diversity as being important have higher confidence in their ability to attract and retain skilled staff[11].

Survey Finding:

Businesses with positive organisational cultures have higher planned resilience.

Businesses with positive organisational cultures have higher adaptive resilience[10].

Survey Finding:

Businesses which rate workplace diversity as being important have higher planned resilience.

Businesses which rate workplace diversity as being important have higher adaptive resilience[12].

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8   Survey scales are found in RESET Report No. 3
9   See analysis in Appendix A – Part 1
10 See analysis in Appendix A – Part 2

11 See analysis in Appendix A – Part 3
12 See analysis in Appendix A – Part 4

MARKETING, INFRASTRUCTURE AND PLANNING CHALLENGES

Destination characteristics as barriers to and enablers of resilience

Certain attributes of Melbourne's West were seen to undermine destination resilience. The region faces an image problem: it is perceived as an 'industrial district', with minimal shade tree canopy and low aesthetic value. There is a perceived lack of events, general scarcity of tourism attractions and poorer cultural and entertainment infrastructure compared to other parts of Melbourne. These perceptions are factors that exacerbate negative stereotypes reducing the motivation to visit of the region. The lack of built infrastructure (in the form of 4-star accommodation and public transport options in outer suburbs) further lowers destination appeal and accessibility. Existing infrastructure was also regarded as not being well maintained due to funding and resource scarcity of authorities like Parks Victoria and LGAs.

> "
> **SUNSHINE HAS NEVER REALLY BEEN SEEN AT ALL AS A TOURIST PLACE… PEOPLE FROM THE OTHER SIDE ESCAPE THE BRIDGE, THEY DON'T LIKE COMING OUT TO THE WEST BECAUSE THEY DON'T THINK THERE'S ANYTHING HERE OF SUBSTANCE**
> "

(P28, Owner-manager, medium business)

> "
> **MY UNDERSTANDING IS THAT PARKS VIC DON'T HAVE A LOT OF FUNDS. SO THEY'VE BEEN LIMITED WITH MAINTAINING THEIR INFRASTRUCTURE OF THE PIERS**
> "

(P7, Officer, local government)

The destination's location also impacts consumption trends. Its proximity to Melbourne CBD means that it draws a higher proportion of day visitors who offer lower yield compared with visitors staying overnight. Although some iconic attractions such as the Werribee Open Range Zoo and Scienceworks are considered hot spots with high visitation, visitor spend is generally centralised to these attractions and does not filter through to surrounding businesses and communities. Furthermore, the lack of collective destination marketing represents a missed opportunity for businesses to package experiences and compete with other destinations.

Above all, fragmented destination planning and the absence of a cohesive vision emerged as key vulnerabilities. As highlighted by some interviewees, the brand, identity and story of Melbourne's West as a destination are not always clearly articulated, and planning overlays and strategies are not well aligned. This points to the need for a holistic and accountable destination management plan that is underpinned with funding, demarcates stakeholder roles, and is driven by collaboration and engagement.

Beyond those destination attributes, COVID-19 introduced additional stressors on Melbourne's West and Greater Melbourne more generally.

The ongoing nature of the crisis together with measures put in place to contain the spread of the virus restricted visitor circulation for prolonged periods of time. Other travel barriers which are likely to have diminished visitation include low consumer confidence to travel, Melbourne's reputational damage resulting from strict lockdowns and high infection rates, the exorbitant costs of travel insurance, and the exclusion of COVID-19 infection risks from travel policies. Melbourne was equally deemed unattractive to temporary workers and international students, thereby fuelling fears of worsening labour gaps and compounding impacts for lower-quality visitor experiences.

At the same time, certain areas were sheltered from the full impact of the pandemic. For example, Hobsons Bay was better serviced by a pre-existing local catchment prior to COVID-19 and was not as reliant on spending from visitors beyond the municipality. Other areas benefited from the changing patterns of work; the proliferation of remote work arrangements resulted in more individuals shopping locally. There were also positive signs of pent-up demands for human connections and leisure experiences following the easing of restrictions.

> " OUR PROXIMITY TO MELBOURNE IS OUR BIGGEST CHALLENGE. IT'S GREAT FOR OUR DAY TRIP VISITORS… BUT THE SPEND ISN'T THERE… THEY DON'T DO A LOT OF ATTRACTIONS AND THEY'RE NOT EATING HERE…. WE'RE TOO CLOSE TO BEING OVERNIGHT STAY "

(P10, Officer, local government)

> " THERE IS ALSO STILL A QUESTION OF CONFIDENCE ABOUT 'CAN WE ACTUALLY ATTRACT BACK THE STUDENTS THAT WE USED TO HAVE?'. MELBOURNE'S REPUTATION AS BEING THE MOST LOCKDOWN CITY IS NOT GOING TO HELP… IT'S MAKING SURE THAT THEIR [CUSTOMER] EXPERIENCE IS REALLY GOOD… IF YOU'VE GOT A LOT OF DEMAND COMING IN, BUT HAVE A SHORT SUPPLY OF LABOUR, THAT LEADS TO A POOR EXPERIENCE… YOU END UP IN A BAD CYCLE "

(P18, General Manager, dual sector organisation)

> " WHEN WE REOPENED AFTER THE LONG LOCKDOWN, OUR AUDIENCES DOUBLED. AND IT WAS REALLY REAFFIRMING FOR US THAT THERE IS VALUE AND A NEED FOR HUMAN CONNECTION, PARTICULARLY IN A CREATIVE CONTEXT. SO THAT FEELING OF COMING BACK, AND PEOPLE WANTING THIS STUFF HAS BEEN A REALLY IMPORTANT MOTIVATOR "

(P14, Executive Director, not-for-profit organization)

OPPORTUNITIES: COMMUNITY, HERITAGE AND INVESTMENTS

Interviewees identified numerous regional development opportunities and factors that support business resilience.

Firstly, the robust population growth in Melbourne's West, particularly among young adults and families and diverse communities, has the potential to increase demand for recreational and entertainment services. Within this context, an evidence-based understanding of the leisure needs of diverse visitor groups is important.

Secondly, the destination's multiculturalism, vibrant heritage and landscape are significant assets that can support the re-imagination of the visitor economy. For example, cultural tourism driven by festivals and the arts were suggested as a way to capitalise on the industrial and multicultural heritage of the region. Other suggested development opportunities that could potentially entice visitors into the region include enhancing

nature-based offerings (e.g. cycling products and geological tours in Melton – the centre of the volcanic region); elevating the arts scene (e.g. through the construction of a satellite art gallery and high-quality sculptures in Sunshine); and the conversion of sites surrounding the Energy Park into a parking station.

Thirdly, tightly-knit communities were seen to contribute to business and individual resilience. During the pandemic, there was an increased awareness around the importance of supporting local businesses. In some areas, locals were even keen to purchase vouchers from hospitality businesses to help them remain solvent. Small-scale collaborations among the local business community were also evident. Business owners also relied on their friends, neighbours and families for emotional support and improved psychological resilience.

"

IT [MELBOURNE'S WEST] IS ONE BIG CULTURAL PARTY; THERE'S JUST A LOT OF LIFE IN THE WEST AND A LOT OF GREENFIELD THINKING

"

(P1, Manager, state government)

"

THERE ARE ALWAYS STORIES ABOUT THE LOCAL CAFÉ… OR THE FLORIST… THEY ARE ALL SUPPORTIVE OF ONE ANOTHER…. THERE WERE TWO BUSINESSES SIDE BY SIDE… NEXT DOOR TO A BOTTLE SHOP. SO THEY COLLABORATED WITH THEIR POS MACHINES… [RESTAURANT NAME] DIDN'T NECESSARILY HAVE THE LICENSE [TO SERVE ALCOHOL]. SO THEY'LL SAY 'YOU CAN GET THE ALCOHOL FROM THE STORE'

"

(P9, Officer, local government)

Finally, substantial investments in the region are indicative of the booming growth and importance of Melbourne's West. For example, it is understood that four new planning applications have been lodged with the Brimbank City Council for future accommodation developments at Sunshine and Albion. A further six permits for accommodation developments have already been approved by adjacent municipalities across Melbourne's West.

Government projects, like the Melbourne Airport Rail (MAR) infrastructure project (connecting Melbourne Airport to Sunshine, Melbourne CBD and other parts of Victoria), the Sunshine Precinct project and the North West City deal, were considered opportunities to build modern productive infrastructure and attract business investment. Other key infrastructure projects which are in the pipeline include:

- the new Footscray Hospital;
- upgrades to the Werribee Open Range Zoo;
- the redevelopment of facilities at Whitten Oval; and
- upgrades to visitor facilities at Brimbank Park and Organ Pipes State Park (funded by state government) and Grazeland at Spotswood (privately funded).

Future projects in the region include:

- the Museum of the Future at Scienceworks;
- the Vietnamese Museum at Footscray;
- the Wetlands Centre at Altona;
- the Equestrian Victoria Masterplan at Werribee Park;
- redevelopments at Seaworks; and
- the Williamstown foreshore, new cycling pathways infrastructure.

At the same time, however, limitations with some of these projects were identified. For instance, it was reported that stakeholders did not share a common understanding of the intent and objectives of the MAR project, thereby diminishing the value of the investment. Whilst the state government perceived this as a transport solution, other stakeholders like LGAs, businesses and industry bodies viewed the project as a 'once-in-a-lifetime' opportunity to increase visitor traffic and make the region a destination of choice. Delays with the North West City deal were also anticipated due to COVID-19. At a broader level, it was suggested that some infrastructure developments may be adversely impacted by external factors, such as height limitations for buildings surrounding the airport and the proposed windfall tax for rezoned developments.

"
I THINK THERE'S BEEN… SOME MISINTERPRETATION, BETWEEN COUNCIL AND THE DEPARTMENT OF TRANSPORT…. WHEN THE STATE GOVERNMENT INITIALLY ANNOUNCED THE ROUTE FOR THE AIRPORT RAIL LINK AND THE STATION AT SUNSHINE, THEY USED WORDS IN THE MEDIA RELEASES THAT WERE ALONG THE LINES OF 'SUNSHINE SUPER HUB'… AND THE COUNCIL TOOK HOLD OF THAT AND THOUGHT, 'WELL, WE'RE GOING TO HAVE ALL THIS EXTRA INVESTMENT IN SUNSHINE'. I THINK WHAT THE STATE GOVERNMENT WAS SAYING IS, 'WE'RE INVESTING IN THE TRAIN STATION… THAT'S AN OPPORTUNITY FOR YOU COUNCIL AND FOR THE PRIVATE SECTOR TO INVEST IN THE AREA'… I HAVE SEEN A REPORT FROM THE DEPARTMENT OF TRANSPORT ABOUT THE ECONOMIC IMPETUS THAT THE TRAIN STATION CAN BRING TO SUNSHINE. I DON'T THINK THAT THE DEPARTMENT OF TRANSPORT IS PLANNING ANY PARTICULAR SHOP AT THE SUNSHINE STATION
"

(P12, Executive Officer, industry body)

GOVERNMENT GRANTS AND INDUSTRY SUPPORT

Government and industry support programs acted as a lifeline for businesses, and enhanced resilience. As discussed previously in the *'financial resilience'* section, different government grant opportunities enabled businesses to confront the crisis. The level of financial support provided to government-owned and dual sector entities (i.e. those that are jointly government-owned and not-for-profit) was also notable.

During the pandemic, LGAs introduced a range of measures to facilitate business continuity and compliance with evolving regulatory requirements. Some of these include:

◆ simplifying application processes for outdoor dining and liquor licences;

◆ waiving permit fees and discounting rate payments;

◆ providing outdoor furniture to micro and small businesses;

◆ allocating micro-grants to assist CALD businesses set up their website;

◆ promoting local businesses through free advertisements and marketing campaigns;

◆ collaborating with industry experts (e.g. accountant, HR specialist, real estate professionals and lawyers) to deliver online training on a range of financial, marketing, legal and people management topics; and

◆ recruiting dedicated support officers tasked with improving communication with CALD business owners with limited English-speaking skills. Similarly, Traders Associations worked very closely with micro, small and CALD businesses to identify their training, marketing and digital needs.

POLICY AND GOVERNANCE ISSUES

Concerns around three key governance aspects were raised. The first relates to government grant administration processes. The JobKeeper scheme was criticised by many interviewees. The exclusion of international students and migrant workers from JobKeeper was deemed unfair. Fixed JobKeeper payments (irrespective of working hours) were said to demotivate employees (especially casuals) from returning to work. Likewise, the COVID Test Isolation scheme (a state government funding program) was reportedly abused by workers who were tested on a regular basis to earn the $450 payments.

Setting aside employee funding schemes, participants further expressed their dissatisfaction with government's communication and application processes for business support schemes. Grant eligibility conditions were seen to be ambiguous; application and reporting processes were cumbersome and costly (especially considering the low grant amounts on offer), and grant opportunities were perceived as being unequally distributed across regions. For example, dining, travel and entertainment vouchers originally introduced by the state government were said to favour businesses in Melbourne CBD and regional Victoria at the expense of Melbourne's West.

The second issue relates to the state government's crisis management and communication response. For many participants, COVID-related communications and public health directions were unclear and out of tune with business realities. For example, business owners recalled how last-minute lockdown announcements disrupted business operations and staffing arrangements and generated massive financial losses. The ambiguity of public health directives also created anxiety among business owners who were often left on their own to interpret the legislation. The economic viability of density limits was questioned, especially for those businesses with no outdoor dining facilities. The 5km travel radius restriction was found to negatively impact the majority of businesses, but particularly those CALD business with niche ethnic markets. Alarmingly, government's crisis response seemed to erode the trust and investment intentions of business owners.

> " FROM A JOBKEEPER PERSPECTIVE, IT WAS A GREAT PROGRAM, BUT THE MODELING OF IT WAS WRONG… ONE IT COST TOO MUCH. BUT TWO, IT DIDN'T PROVIDE A FAIR AND EQUITABLE FUNDING MODEL OR A FUNDING MODEL THAT PROVIDED A LEVEL SAFETY NET… IT WAS QUITE A PROFITABLE SAFETY NET, AND IT DIDN'T INCENTIVIZE A RETURN TO WORK "
>
> (P5, Manager, local government)

> " BUSINESSES WERE TRYING TO MAKE SURE THAT THEY STAY COVID SAFE WITHIN THE LAW. THERE ARE $110,000 FINES IF YOU GET THIS WRONG… IF WE TALK ABOUT STRESS AND ANXIETY, $100,000… THAT'S NOT JUST A FINE, THAT'S BANKRUPTCY ATTACHED TO YOUR HOUSE. IT'S YOUR WHOLE LIFE BUNDLED OUT JUST BECAUSE YOU MIGHT NOT BE ABLE TO PROVE THAT YOU'VE MET EVERY PARTICULAR ASPECT OF THIS HEALTH ORDER. AND WHEN YOU GO AND ASK THE STATE TO INTERPRET THEIR OWN HEALTH ORDERS, THEY CAN'T DO IT. THEY JUST SAY GO TO THE HEALTH ORDERS (THE CORONAVIRUS WEBSITE) "
>
> (P3, Coordinator, local government)

Finally, there was some indication that the lack of collaboration and synergies between different levels of government (federal, state and local) combined with government's lack of understanding of the value of tourism deter transformational change in the industry and undermine development opportunities in Melbourne's West. For instance, it was reported by one participant that LGAs were expected to individually advocate for train stops within the context of the MAR project. Another participant went one step further and explained how, compared to Europe and America, Australia (as a young nation) lags in terms of its cultural appreciation and respect for the visitor economy. This in turn translates into a lack of government leadership to drive meaningful change in the industry.

> TRUST IS A BIG ISSUE. AND I KNOW THE GOVERNMENT SAYS, 'WE WON'T GET LOCKED DOWN AGAIN NEXT YEAR'. ALL THE MESSAGES POINT TO THE OTHER WAY AROUND, THEY'VE GOT THE PANDEMIC POWERS THROUGH... SO OBVIOUSLY THEY WANT TO HOLD A CARD CLOSE TO THEIR CHEST TO KEEP THEIR OPTIONS OPEN. SO FOR ME TO GO AND COMMIT ANOTHER MILLION DOLLARS ON DEVELOPING THAT (ROOFTOP) SPACE. I'M NOT GOING DO IT... THE CONFIDENCE IS NOT THERE TO GO AND... EMPLOY MORE PEOPLE... TO BUILD THINGS... SO THAT'S PROBABLY THE FUTURE CHALLENGE FOR OUR INDUSTRY, TO GET OUR CONFIDENCE BACK UP AGAIN TO REINVEST

(P27, Director, medium organisation)

Conclusion

In conclusion, the research findings show the multiple ways in which the visitor economy in Melbourne's West has been negatively impacted and disrupted by the pandemic. As reported, business operators have suffered severe financial losses, mental health issues, labour and skill shortages and long-term uncertainty due to sudden and on-going changes to the regulatory environment. Many of these issues are common to the visitor economy across Victoria (Pyke et al., 2021, Lindsay-Smith et al., 2022) and other states. At the same time, some of these issues are more pronounced in Victoria given that lockdowns in this state were longer lasting and more disruptive than other Australian states.

However, the research also highlights impacts and circumstances that are particular to Melbourne's West. These include the multicultural character of businesses in Melbourne's West that were differently impacted by changing government regulations and the varying levels of business capacity in relation to human resources, risk management, digital skills and financial reserves. It also highlights entrenched labour market issues in relation to labour supply and working conditions. Further,

the research shows the relative disadvantage of the region in terms of infrastructure development, destination image and reliance on international visitors and temporary labour. The lack of coordination of visitor economy planning is particularly highlighted.

A core assumption of the 'modified Destination Resilience Framework' (Pyke et al., 2021) is that it is not the shock (i.e. the pandemic in this case) that causes the vulnerability of the tourism system. Rather, a shock reveals vulnerabilities and resilience characteristics that determine the extent to which the system is affected. The identification of vulnerabilities can then inform how a system can adapt and be strengthened to increase resilience to future shocks.

This has been the purpose of the research – to reveal how the visitor economy might be strengthened going forward. The following road map is therefore informed by the research findings and based on the input from all contributing stakeholders to the research. The intention is the road map will provide recommendations on the directions for future strategic planning for the region's visitor economy.

ROADMAP FOR RECOVERY

The visitor economy brings significant economic and socio-cultural value to communities in Melbourne's West. The sector has been disproportionately impacted by the pandemic, and it is crucial that the sector not only recovers but is strengthened to ensure greater resilience and success in a future that is likely to present not only disruptions but considerable opportunities. These opportunities arise from unprecedented infrastructure spending, projected population growth and increasing government recognition of the social and economic importance of the visitor economy to the region.

Informed by multiple sources of primary and secondary data, the roadmap provides recommendations on immediate and long-term strategies for businesses and Melbourne's West to adjust and thrive into the future. The roadmap is set within the context of the state government's wider policy framework – the Visitor Economy Recovery and Reform Plan – around driving the sustainable, long-term growth of the visitor economy through the development of new experiences, products

and infrastructure and state-wide collaboration and planning. Recommendations in the roadmap resonate with state-wide considerations around the importance of attracting and retaining skilled workers and supporting industry to deliver world-class visitor experiences. At the same time, the roadmap considers the specific characteristics of the region as a destination, including the multicultural trading character and its visitor infrastructure needs.

About the recommendations

Recommendations are positioned across three critical action areas, namely:

- Skills and labour;
- Business capability development; and
- Destination marketing, infrastructure and planning.

These recommendations align with the vision of the visitor economy in Melbourne's West:

- Recasting the visitor economy as an employer of choice and reconnecting with workers post crisis;
- Modernising business practices and supporting workers to build a crisis resilient organisation and workforce; and
- Legitimising Melbourne's West as a tourism destination and planning for visitor economy development in the region.

The intention of the recommendations is to enable businesses and the overall region of Melbourne's West to capitalise on new opportunities for growth. It is recognised that many of the issues identified, such as labour shortages, are an outcome of systemic issues that will require long-term structural reform and extensive collaboration between industry and government to resolve. As such, strategies are proposed as short-term and long-term measures necessary to address the relative vulnerabilities identified by the research.

RECOMMENDATIONS SUMMARY

Action area: Skills and labour

The visitor economy is a service industry that needs the right skills at the right time, and skills and labour shortages are currently acute. Addressing this problem requires a combination of strategies led by businesses, industry and government. Some incremental strategies are proposed to open talent access points. At the same time, the highly competitive Australian labour market means that other sectors (offering more lucrative rewards, job security and with less chance of impact from any future lockdowns) are marketing and recruiting from the same talent pool. Transformational changes are therefore needed to improve employment conditions in the industry and lift the profile of careers in the sector. Within this context, the following recommendations are proposed.

IMMEDIATE PRIORITIES	DETAILS	RESPONSIBLE STAKEHOLDERS
1.1 Establish a Visitor Economy Jobs Advisory body to consider and address the short, medium and longer term skills requirements of the industry at a national, state, and regional level.	◆ The need for such a body has been advocated at a state level and regional level given the chronic, national and international nature of the skills and labour shortages currently facing (and crippling) the industry at present. Such a body requires attention to regional differences and representation by stakeholders from Melbourne's West.	A collaboration between federal, state and local regional authorities with representation by industry associations and education institutions.
1.2 Increase the supply of skills to the sector.	◆ **Fast-track skill acquisition through staff training** Provide on-going support for the delivery of rapid, low-cost and customised skills training programs to domestic and international workers. ◆ **Increase labour supply** Continued relaxation of work hours for student visa holders, the expansion of the Temporary Skills Shortage (TSS) visa scheme, greater recognition of visitor economy employment within skilled migration applications and sustain business support from Jobs Victoria.	Collaboration between higher education providers and industry associations and funded by state and federal governments.

IMMEDIATE PRIORITIES	DETAILS	RESPONSIBLE STAKEHOLDERS
	◆ **Increase business awareness of, and access to jobs support** Jobs Victoria has been assisting businesses with their staffing needs by providing wage subsidies and connecting businesses with job ready candidates. Information regarding this key support should be broadly disseminated across the business community with attention to multicultural community information needs.	Led by state and federal governments in collaboration with industry and LGAs.
1.3 Increase business capacity to attract and re-engage employees.	◆ **Provision of financial incentives to join the workplace** Provide incentives for employees such as employee vouchers and signing bonuses. Review taxation treatment for retired and pensioners for casual employment that does not jeopardise their present entitlements such as access to the Seniors Healthcare card or part and full pensions. ◆ **Increased focus on occupational health and safety** Support businesses to implement comprehensive workplace health and safety processes to build the confidence of employees and volunteers (especially older workers and volunteers) to resume work.	State and federal government funding. Collaboration between government, industry associations and businesses.

LONG-TERM STRATEGIES TO IMPROVE EMPLOYMENT CONDITIONS AND INDUSTRY BRANDING	DETAILS	RESPONSIBLE STAKEHOLDERS
1.4 Support businesses to build leadership and human resource management capabilities. This involves ensuring that existing business support programs are accessible and relevant to business operators in Melbourne's West.	Specific capabilities include: ◆ **Leadership development** Train and mentor business owners and managers to enhance their people management and soft skills and promote a positive workplace culture. ◆ **Innovative work design** Support businesses to design flexible jobs that offer better job security (e.g. job sharing) and employee empowerment. ◆ **Strategic reward management** Help businesses adopt a 'total reward' strategy with an emphasis on fair compensation and benefits AND non-financial rewards, such as work-life balance and innovative job design. ◆ **Learning and development, and career progression for staff** Provide learning and development opportunities to employees to support career path development. ◆ **Effective communication of employer brand** Formulate effective communication strategies to help businesses market their employer brand and reward strategies (financial and non-financial rewards) to the labour market.	Collaboration between businesses, industry associations and higher education providers, and funded by all levels of government.
1.5 Develop workforce skills and capabilities ensuring that the needs of Melbourne's West are considered as an essential component of the wider education planning, program development and implementation process.	◆ **Free TAFE programs** Expand and continue free TAFE programs to be inclusive of all tourism, hospitality and events training programs. ◆ **Review of the jobs ecosystem to establish career pathways** Clarify visitor economy career-path opportunities, identify innovations that will support full-time continuing employment opportunities (e.g. employee sharing between employers) and promote the sector as a 'career of choice'. ◆ **Training incentives to employers** Review and expand current visitor economy training and employment incentives for employers to support traineeship and apprenticeship programs.	Collaboration between government, education institutions and industry associations.

LONG-TERM STRATEGIES TO IMPROVE EMPLOYMENT CONDITIONS AND INDUSTRY BRANDING	DETAILS	RESPONSIBLE STAKEHOLDERS
1.6 Increase workforce participation in the sector from diverse cohorts such as older workers, people from CALD backgrounds, people with disabilities and first nations people.	◆ **Diversity and inclusion** Encourage employer adoption and implementation of diversity and inclusion principles and practices in recruitment and retention strategies. ◆ **Wage subsidies for specific domestic cohorts** Provide wage subsidies and/or tax incentives such as the federal government's RESTART program aimed at the recruitment of mature-aged workers and other cohorts currently marginalised to seek employment in the sector.	Led by individual businesses, with the support of industry associations and all tiers of government. One example of funding provided by the federal government is the Employment Assistance Fund which funds work-related modifications and services for employees with disabilities.
1.7 Undertake a regional workforce review and formulate tailored workforce plans for the visitor economy in Melbourne's West.	◆ **Regional workforce plan** In line with state government plans to fund Regional Tourism Boards (non-metropolitan), ensure that Melbourne's West is equally eligible for support to undertake a regional workforce plan.	Collaboration between industry and state government.

Action area: Business capability development

Patchy digital, risk management and people management capabilities, together with low employee and employer wellbeing exacerbate the vulnerability of businesses, particularly micro and small operators. In the context of rapid change and the likelihood of future disruptions, industry resilience relies on the development of core business capabilities to underpin future growth.

IMMEDIATE PRIORITIES TO ENHANCE BUSINESS CAPABILITY	DETAILS	RESPONSIBLE STAKEHOLDERS
2.1 Increase the digital capabilities of businesses within Melbourne's West.	◆ **Investigate barriers to digital adoption** As part of wider skills and labour review (see 1.5), review digital adoption and capabilities in micro, small and medium businesses in Melbourne's West, inclusive of exploring barriers to digital adoption. ◆ **Digital technology affordability** Make digital technology affordable to micro, small and medium businesses. For example, this can include extending the Small Business Digital Adaptation program and making the program available in Vietnamese, Mandarin and Arabic. ◆ **Promote and extend existing resources and measures to help micro, small and CALD businesses go digital** Continue programs such as VTIC's Tourism Digital BizKeeper Program, or, customise such programs to the business/ cultural needs of specific regions.	State government in collaboration with industry associations, LGAs and education providers.

IMMEDIATE PRIORITIES TO ENHANCE BUSINESS CAPABILITY	DETAILS	RESPONSIBLE STAKEHOLDERS
2.2 Increase awareness by the small business community of the importance of modernising business practices and diversifying offerings. 2.3 Provide one-on-one support to micro, small and CALD businesses through business coaching and mentoring. 2.4 Introducing targeted financial support to encourage digital adoption.	Offer training programs and workshops in key languages, with some programs being self-paced and bite-sized to engage time-poor business owners. Training should focus on: ◆ **Digital enablement of micro, small and medium businesses** This includes improving the digital skills of business owners and sharing knowledge on digital solutions, data management and strategies to reach a wider audience online. ◆ **Flexible risk management approaches that fit the context of micro, small and medium businesses** This includes managing risks associated to key business areas like cash flow management, supply chain, workforce management, cybersecurity and customer needs. ◆ **Business diversification** Business capability programs should include strategies that drive diversification and product innovation. ◆ **Leadership development** (as per recommendation 1.4) and conflict management training for staff.	Collaboration between industry associations and higher education providers, and funded by all levels of governments. Given the ethnic diversity in Melbourne's West, stakeholders such as *traders associations and LGAs have a key role to play in engaging CALD businesses* with training and mentoring programs.

Action area: Destination marketing, infrastructure and planning

The visitor economy in Melbourne's West is generally under-valued and has an image problem. This is despite the region's rich history and unique and extensive natural, social and cultural assets. The region is home to a rich and vibrant first nation's history and community, a diverse and rapidly growing multi-cultural population, and an abundance of natural and cultural assets. However, there is patchy recognition of the region as a visitor destination. Unlike non-metropolitan regions, a regional tourism board is not supported by state government funding. The region also has little access to visitor economy recovery programs despite having been disproportionately impacted by the pandemic. Unlike other states such as NSW (with strategies focused on urban regions of Sydney), there is currently no formalised governance or structural vehicle through which to plan and drive visitor economy development within the region. To maximise the community benefits of a strong visitor economy in Melbourne's West, a clear plan is needed to guide investment, industry development and funding that will leverage the region's assets and potential. The following actions are proposed in this wider context.

IMMEDIATE PRIORITY	DETAILS	RESPONSIBLE STAKEHOLDERS
3.1 Develop a Destination Management Plan which will provide a blueprint for a collaborative approach to visitor economy development, management and marketing across the six LGAs of Melbourne's West.	As currently being funded and implemented in Victoria's non-metropolitan regions, develop a destination plan that will promote destination resilience, leverage opportunities generated by transport infrastructure developments, and inform how the region can position itself in terms of what Melbourne's West stands for and how it differs from other destinations. The plan would be inclusive of informed analysis to define: ◆ The strategic outlook for the region. ◆ Visitor markets: informed by visitation trends and market segmentation analysis. ◆ A workforce/industry development plan. ◆ A destination development plan including infrastructure priorities. ◆ An advocacy plan. ◆ A climate friendly visitation plan.	State government funded, co-designed with community, industry and government stakeholders, and delivered with oversight by WMT.

LONG-TERM STRATEGIES: 'DEMAND' SIDE	DETAILS	RESPONSIBLE STAKEHOLDERS
3.2 Informed by a master plan (3.1) invest in a robust marketing campaign.	Elements of that campaign might include: ◆ **Holistic marketing strategy** Planning and showcasing the range of destination experiences e.g. events, music, arts, tourism, attractions and dining/hospitality opportunities in the region. ◆ **Digital marketing** A coordinated digital content strategy and associated communications channels. ◆ **Cooperative destination marketing** Working with businesses to support packaging of experiences and cooperative destination marketing. ◆ **Visitor incentives** Establishing a government-funded Entertainment and Travel Voucher scheme dedicated to Melbourne's West. In this way, visitors are given the opportunity to experience what the region has to offer. ◆ **Night-time economy** Incorporating the night-time economy (recommendation 3.6) as a strong theme of the campaign. ◆ **Niche marketing** Defining and targeting regional promotion to high value niche markets. ◆ **Familiarisation trips** Organising familiarisation trips to enable tour operators, travel agents and other stakeholders to experience the destination first-hand. ◆ **Effective signage and tourism wayfinding measures** Review and enhance regional signage and interpretation.	Collaboration between all levels of government, industry associations and businesses with oversight by WMT.

LONG-TERM STRATEGIES: 'DEMAND' SIDE	DETAILS	RESPONSIBLE STAKEHOLDERS
3.3 In conjunction with 3.2 above, support businesses to revitalise their marketing and image.	◆ **Regional branding strategy** As part of the Destination Management Plan (3.1 above), identify regional branding strategies for businesses. ◆ **Support business with marketing** Support businesses to revitalise marketing strategies and use an array of online advertising (e.g. social media advertising and Google Places listings) and local advertising options (e.g. word-of-mouth, local press and flyers). This support might extend to the provision of a regional on-line presence that showcases the diversity of visitor experiences available across the region.	State and local governments, WMT, industry associations, regional stakeholders.
3.4 Manage visitors risk perceptions of the destination.	◆ **Positive media coverage of the destination** Address safety concerns by working with media to minimise sensationalism of negative incidents, and ensuring that positive stories on Melbourne's West equally receive media coverage.	Collaboration between LGAs, Victoria Police & industry associations.
3.5 Develop tourism products to grow visitation.	Product development to be guided by: ◆ **First nations community engagement** Engage with first nations communities to explore the potential for indigenous tourism products in region. ◆ **Support multicultural business entrepreneurship and business development** Support ethnic community business networks in product innovation and entrepreneurship. ◆ **Capitalise on natural assets of the region** Protect and capitalise on natural environmental assets and connecting green spaces to trail networks (walking, cycling, and horse riding). ◆ **Embrace the industrial history of the destination** Investigate the industrial tourism potential of the region (e.g. educational tours). ◆ **Strengthen offerings** Strengthen the arts, culture and food tourism offerings (e.g. by strengthening connections with Melbourne Food & Wine Festival and promoting multicultural celebrations such as Diwali and Chinese New Year).	Collaboration between LGAs, state government, businesses and industry associations.

LONG-TERM STRATEGIES: 'DEMAND' SIDE	DETAILS	RESPONSIBLE STAKEHOLDERS
3.6 Develop the night-time economy.	◆ **Work with businesses** Work with businesses to promote extended opening hours and activations and minimise regulatory disincentives to investment in night-time activities.	Collaboration between LGAs and businesses.

LONG-TERM STRATEGIES: 'SUPPLY' SIDE	DETAILS	RESPONSIBLE STAKEHOLDERS
3.7 Review and reinvigorate declining infrastructure in the region's state parks and green spaces.	◆ **Infrastructure maintenance** Undertake an infrastructure and enhancement program of the natural assets in the region to encourage visitation.	Led by LGAs in conjunction with Parks Victoria and state government.
3.8 Promote increased utilisation of public transport throughout the region and ensuring positive visitor experiences.	◆ **Transport connectivity** Working with Public Transport Victoria to improve transport connectivity coupled with active transport plans. ◆ **Integrated travel itineraries** Develop travel itineraries that connect various attractions. For example, buses which travel to Great Ocean Road can stop over at Werribee Zoo, thereby creating opportunities for visitors to spend money and be exposed to Melbourne's West.	Collaboration between industry associations, LGAs, and businesses/tour operators.
3.9 Increase the supply and diversity of visitor accommodation across the region.	◆ **Visitor accommodation audit and gaps analysis** As part of a destination master plan (see 3.1), undertake a visitor accommodation audit and gaps analysis to understand the current inventory of accommodation supply in the region and see where gaps exist in supply. ◆ **Visitor accommodation investment** Encourage investment in high quality, internationally branded hotel developments as well as schemes that are architecturally distinctive and environmentally sustainable.	Collaboration between businesses, LGAs and industry associations. Governments need to provide the planning controls and frameworks to facilitate investment in accommodation which matches the needs of the region
3.10 Embrace a more strategic focus on the visitor economy opportunities associated with the Melbourne Airport Rail (MAR) infrastructure project.	◆ **Infrastructure development through the visitor economy lens** Prioritise visitor economy planning as a core element of regional infrastructure development plans. ◆ **Attraction and accommodation packaging** LGAs to work with businesses to package attraction and accommodation products for an integrated visitor experience.	LGAs, state government & investors.
3.11 Work with Melbourne and Avalon Airports in supporting visitor dispersal to Melbourne's West.	◆ **Research on visitor characteristics** As part of a wider regional plan, investigate the visitor characteristics, potential for visitation in the region, and potential marketing/communications strategies for drawing visitation to the west.	Avalon airport, LGAs, funded by state government.

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APPENDIX A — PART 1

Business culture (Average score) vs Difficulty in recruiting Permanent staff

Group Statistics

	DIFF_PER	N	MEAN	STD. DEVIATION	STD. ERROR MEAN
Business Culture Ave	Not difficult at all	32	4.2539	.72989	.12903
	Difficult	142	4.0546	.68246	.05727

Independent Samples Test

		LEVENE'S TEST FOR EQUALITY OF VARIANCES				T-TEST FOR EQUALITY OF MEANS					
						Significance				95% Confidence Interval of the Difference	
		F	Sig.	t	df	One-Sided p	Two-Sided p	Mean Difference	Std. Error Difference	Lower	Upper
Business Culture Ave	Equal variances assumed	.101	.752	1.474	.172	.071	.142	.19933	.13527	-.06767	.46632
	Equal variances not assumed			1.412	44.042	.082	.165	.19933	.14117	-.08517	.48383

FINDINGS

There is a significant link between 'business culture' and 'businesses' difficulty in recruiting permanent staff' (at 10% level). Businesses with higher/better 'business culture' score are more likely to face no difficulty in recruiting permanent staff.

Business culture (Average score) vs Difficulty in recruiting Casual staff

Group Statistics

	DIFF_CASUAL	N	MEAN	STD. DEVIATION	STD. ERROR MEAN
Business Culture Ave	Not difficult at all	49	4.3163	.66149	.09450
	Difficult	131	4.0544	.70916	.06196

Independent Samples Test

		LEVENE'S TEST FOR EQUALITY OF VARIANCES				T-TEST FOR EQUALITY OF MEANS					
							Significance				95% Confidence Interval of the Difference	
		F	Sig.	t	df	One-Sided p	Two-Sided p	Mean Difference	Std. Error Difference	Lower	Upper
Business Culture Ave	Equal variances assumed	.831	.363	2.245	178	.013	.026	.26194	.11665	.03173	.49214
	Equal variances not assumed			2.318	91.872	.011	.023	.26194	.11300	.03751	.48637

FINDINGS

There is a significant link between 'business culture' and 'businesses' difficulty in recruiting casual staff' (at 5% level). Businesses with higher/better 'business culture' score are more likely to face no difficulty in recruiting casual staff.

Business culture (Average score) vs Confidence in attracting staff

Group Statistics

	CONFIDENCE ATTRACTING STAFF	N	MEAN	STD. DEVIATION	STD. ERROR MEAN
Business Culture Ave	**Not confident**	161	4.1087	.68367	.05388
	Confident	60	4.3750	.57259	.07392

Independent Samples Test

		LEVENE'S TEST FOR EQUALITY OF VARIANCES				T-TEST FOR EQUALITY OF MEANS					
							Significance				95% Confidence Interval of the Difference	
		F	Sig.	t	df	One-Sided p	Two-Sided p	Mean Difference	Std. Error Difference	Lower	Upper
Business Culture Ave	**Equal variances assumed**	4.445	.036	-2.686	219	.004	.008	-.26630	.09916	-.46174	-.07087
	Equal variances not assumed			-2.911	125.304	.002	.004	-.26630	.09147	-.44734	-.08527

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FINDINGS

There is a significant link between 'business culture' and 'business confidence in attracting staff' (at 1% level). Businesses with higher/better 'business culture' score are more confident in attracting staff.

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Business culture (Average score) vs Confidence in retaining staff

Group Statistics

	DIFF_CASUAL	N	MEAN	STD. DEVIATION	STD. ERROR MEAN
Business Culture Ave	Not confident	144	4.0842	.68351	.05696
	Confident	78	4.3494	.59228	.06706

Independent Samples Test

		LEVENE'S TEST FOR EQUALITY OF VARIANCES				T-TEST FOR EQUALITY OF MEANS					
							Significance			95% Confidence Interval of the Difference	
		F	Sig.	t	df	One-Sided p	Two-Sided p	Mean Difference	Std. Error Difference	Lower	Upper
Business Culture Ave	Equal variances assumed	1.645	.201	-2.888	220	.002	.004	-.26516	.09181	-.44609	-.08422
	Equal variances not assumed			-3.014	178.223	.001	.003	-.26516	.08799	-.43879	-.09153

FINDINGS

There is a significant link between 'business culture' and 'business confidence in retaining staff' (at 1% level). Businesses with higher/better 'business culture' score are more confident in retaining staff.

APPENDIX A — PART 2

Correlations

		BUSINESS CULTURE AVE	PR AVE	AR AVE
Business Culture Ave	Pearson Correlation	1	.578**	.542**
	Sig. (2-tailed)		<.001	<.001
	N	224	209	209
PR Ave	Pearson Correlation	.578**	1	.826**
	Sig. (2-tailed)	<.001		<.001
	N	209	211	211
AR Ave	Pearson Correlation	.542**	.826**	1
	Sig. (2-tailed)	<.001	<.001	
	N	209	211	211

FINDINGS

There is a positive correlation between 'business culture' and 'planned resilience' at 1% level.

There is a positive correlation between 'business culture' and 'adaptive resilience' at 1% level.

APPENDIX A — PART 3

Correlations

		EQUAL EMPLOYMENT OPPORTUNITIES AND/OR DIVERSITY PRACTICES	CONFIDENCE IN ATTRACTING /RECRUITING APPROPRIATELY SKILLED STAFF	CONFIDENCE IN RETAINING/ KEEPING APPROPRIATELY SKILLED STAFF
Equal employment opportunities and/or diversity practices	Pearson Correlation	1	.173**	.202**
	Sig. (2-tailed)		.010	.002
	N	227	224	223
Confidence in attracting / recruiting appropriately skilled staff	Pearson Correlation	.173**	1	.770**
	Sig. (2-tailed)	.010		<.001
	N	224	230	227
Confidence in Retaining/keeping appropriately skilled staff	Pearson Correlation	.202**	.770**	1
	Sig. (2-tailed)	.002	<.001	
	N	223	227	229

FINDINGS

There is a positive correlation between 'workplace diversity/inclusion' and 'business confidence in attracting or recruiting appropriately skilled staff' at 1% level.
There is a positive correlation between 'workplace diversity/inclusion' and 'business confidence in retaining or keeping appropriately skilled staff' at 1% level.

APPENDIX A — PART 4

Correlations

		EQUAL EMPLOYMENT OPPORTUNITIES AND/OR DIVERSITY PRACTICES	PR AVE	AR AVE
Equal employment opportunities and/or diversity practices	Pearson Correlation	1	.585**	.563**
	Sig. (2-tailed)		<.001	<.001
	N	227	211	211
PR Ave	Pearson Correlation	.585**	1	.826**
	Sig. (2-tailed)	<.001		<.001
	N	211	211	211
AR Ave	Pearson Correlation	.563**	.826**	1
	Sig. (2-tailed)	<.001	<.001	
	N	211	211	211

**Correlation is significant at the 0.01 level (2-tailed).

FINDINGS

There is a positive correlation between 'workplace diversity/inclusion' and 'planned resilience' at 1% level.

There is a positive correlation between 'workplace diversity/inclusion' and 'adaptive resilience' at 1% level.