WHITEHORSE BUSINESS PERFORMANCE SURVEY 2019

A summary research report for the
Whitehorse City Council
by Deakin Business School

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Acknowledgement

The 2019 Business Performance Survey is a collaboration between the *Whitehorse City Council's* Business Development team and the Deakin Business School. Whitehorse City Council's Business Development team carried out the survey and collected the data. The team at the Deakin Business School analysed the data and prepared the report. We would like to acknowledge and sincerely thank the business owners and managers who participated in this year's survey for their time and effort.

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Executive summary

- The 2019 report presents insights from the information collected primarily from 161 business owners who responded to an online and paper-based survey.
- The median number of employees in a business has remained fairly consistent at 5 employees for all three surveys. Most businesses in the surveys had from between 1 and 5 employees, including the owner.
- Approximately 75% of businesses in 2019 employed full time staff.
- 67% of businesses were seeking to hire new staff – an increase from 2014 (50%) and 2017 (63%).
- 12% of businesses reported they were likely to *reduce* their labour force – similar to 2014 but an increase compared to 2017 (3%).
- 58% of respondents in 2019 did not plan to expand their business in the next three years.
- The proportion of respondent businesses based from a home decreased from 2017 to 2019 (47% to 37%, respectively).
- 21% of business owners in 2019 indicated they would consider moving their business into a shared workspace or co-working space facility.
- The proportion of businesses doing *at least some trading* online was 100% in 2019.
- The proportion of firms generating up to 20% of their trade online increased dramatically in 2019 (58%) compared to the 2014 (39%) and 2017 (43%) surveys.
- The proportion of businesses generating between 21% and 40% of their trade online increased remarkably over the 2014-2019 period, from 13% (2014), 8% (2017) and 20% (2019).
- There did not appear to be any relationship between the age of a business and how much business it conducted online in 2019.
- Over the three survey periods (2014 to 2019), there were declines in the proportions of businesses that were operating in four of the six business-age categories.
- The proportion of businesses planning to expand in some way remains consistent between the three surveys at around 42%.
- The average number of hours that respondents spent on business planning each week increased by approximately 30 percent in 2019 compared to the previous surveys.
- No program offered by the *Whitehorse City Council* in 2019 had an awareness level greater than 50% among respondents.
- The highest take-up of the *Whitehorse City Council's* programs in 2019 was nearly one-fifth of respondents for the *Workshops and Seminars*.
- Although having local customers was considered important or very important for nearly half of the 2019 businesses surveyed (48%), there were differences in the importance of various customer markets.

Introduction

The *City of Whitehorse* is located 15 kilometres east of Melbourne's Central Business District (CBD) and covers an area of 64 square kilometres. The Whitehorse community has access to an extensive public transport system with trains, trams, and buses servicing the area. The region is strategically positioned to take advantage of the Eastern Freeway and EastLink, providing access to the CBD, Melbourne Airport, the Yarra Valley in the east and Melbourne's bayside in the south.

It is estimated there are around 15,980 businesses physically operating in Whitehorse[1], with a total of 87,849 residents currently employed[2]. Some of the region's leading educational, medical and leisure facilities are located in Whitehorse. It also forms part of the largest information and communication technology precinct in Melbourne's eastern region. Employers have access to a highly educated, multi-skilled, and innovative workforce with above-average medium and high income earners. Education levels of the labour force are varied, ranging from certificate holders to postgraduate degrees.

Whitehorse City Council has conducted the annual *Business Performance Survey* (BPS) to gather regional economic data specific to the municipality since 2012. From 2014, the BPS expanded its reach to measure economic activity, business performance, and businesses' predictions of future prospects. The BPS assists local businesses and Council in their decision-making by understanding local conditions and information, rather than relying on national data or media for information on business performance. The expanded BPS is now biennial, with the second survey conducted in 2017 and the most recent in 2019.

The Deakin Business School analysed the 2019 BPS data provided by the Council and presents the research results in this report, including a trend analysis with 2014 and 2017 data.

[1] Source: Australian Bureau of Statistics, June 2017.
[2] Source: https://economy.id.com.au/whitehorse

Methodology

The expanded BPS uses standardised responses that are comparable across different business types. The questions in all three surveys are (nearly) the same to allow for trend analysis, but Council shortened the 2019 survey to increase the response rate by removing superfluous questions. Any new questions in the 2019 survey are identified in this report where applicable.

The 2019 survey was open from 4 March to 31 May 2019. Respondents were sought and questionnaires were distributed through: mailings (approximately 2,200; including 200 mandarin proprietors); visiting businesses (500); links sent by email (1,500); advertisements in the Leader and Whitehorse News; Council's corporate and business Facebook pages; and a link available on Council's Wbiz website.

The number of responses for the 2014, 2017, and 2019 surveys were 170, 134, and 161 respectively, with an average of 155 businesses participating across the three years. The number of businesses responding in 2019 increased by approximately 20% from 2017. While the summary information presented here provides valuable insight, it is noted that proportions represented in self-selecting surveys can be biased.

Table 1: Number of survey responses

	2014	2017	2019
Number of responses	170	134	161

Previous reports include details about the survey methods used in 2014 and 2017, and was largely the same in 2019. The surveys in all three years were distributed online and in hard copy format, and were promoted through various channels, including email bulletin, '*Down to Business*', '*Whitehorse News*', *Wbiz* website, *Whitehorse Business Directory*, and the council's business events. One difference in 2019 was that the survey was distributed by *Whitehorse City Council* Health Officers, some in hard copy during site visits and most (1,607) by mail including some in Mandarin. Surveys were also distributed via an email campaign to newly registered businesses from 2017 to December 2018 via the ABR Database. This may explain why the increased response rate and proportion of respondents from the *Accommodation and Food Services* industry segment increased in 2019 (see the Industry Segments section below).

The survey analysis techniques included both descriptive statistics (such as, frequency analysis, and cross-tabulation contingency analysis) and comparative analysis (e.g. trend analysis). In some cases, respondents did not answer all questions. This report thus identifies and discusses proportions based on the total number of responses to each question. Responses represented as *'not applicable'* were removed from analysis. In some instances, ranked measures were recoded to allow for a simpler summary. It is recognised that survey sample data can often include reported measures of interest disproportionately, thereby misrepresenting the actual occurrence of phenomena.

Demographics

The information presented in this report has been provided mostly by business owners and major shareholders of businesses. In the 2019 survey, 89% of respondents owned or were a major shareholder of the business. This was an increase from 2017 (73%) and 2014 (80%). Across all surveys, 81% of respondents owned or were a major shareholder. Most were first time owners of businesses (59% in 2014, 65% in 2017, 57% in 2019).

Table 2: Business owners (or major shareholders) of the business (count and percent)

	Count			Percent		
	All	No	Yes	All	No	Yes
All	459	87	372	100	19.0	81.0
2014	164	33	131	100	20.1	79.9
2017	134	36	98	100	26.9	73.1
2019	161	18	143	100	11.2	88.8

Exhibit 1: Owners (or major shareholders) of the business (percent)

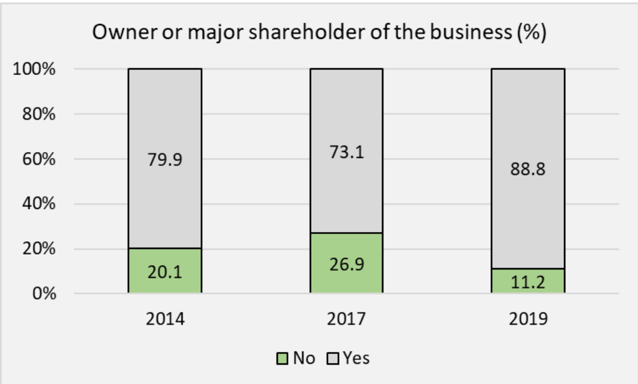


Table 3: Previous ownership of a business (percent)

PERCENT	2014	2017	2019
No	59.2	65.2	57.1
Yes	40.8	34.8	42.9
TOTAL	**100.0**	**100.0**	**100.0**

This year has seen an increase from 15% to 24% of the proportion of respondents indicating that they own more than one business. That is, nearly one out of every four businesses that responded now indicate that they own more than one business. Over the three survey periods, an average of 19% of respondents indicated that they own multiple businesses.

Information about respondents' reasons for starting the business, gender, and birth country if not Australia was not sought in the 2019 survey.

Table 4: Ownership of multiple business (count)

Count	All	No	Yes
All	448	361	87
2014	157	128	29
2017	130	110	20
2019	161	123	38

Table 5: Ownership of multiple business (percent)

%	All	No	Yes
All	100.0	80.6	19.4
2014	100.0	81.5	18.5
2017	100.0	84.6	15.4
2019	100.0	76.4	23.6

In 2019, three-quarters of respondents were 40 years or older (75%). This was a decrease from 83% in 2017 and from 87% in 2014. The largest bracket in all surveys was 50 years or older, but with a downward trend in 2019 (57% in 2014, 49% in 2017, 41% in 2019). Younger owners or shareholders are responding to the surveys, increasing the percentages in the 31-40 age bracket (10% in 2014, 14% in 2017, 20% in 2019).

Exhibit 2: Age groups of respondents (percent)

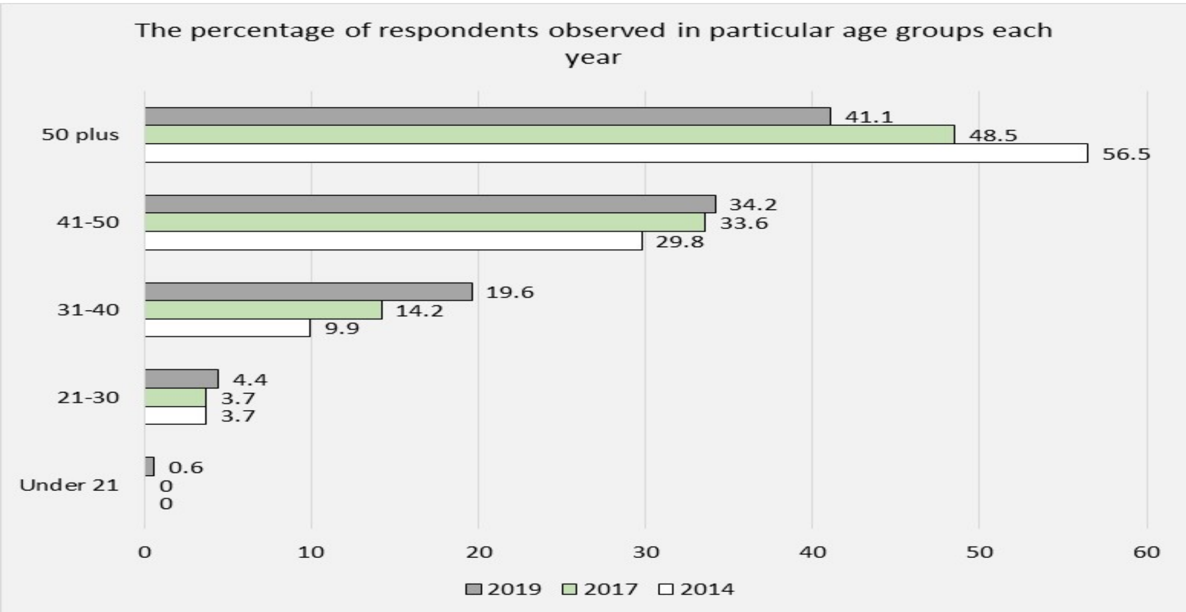


Table 6: Age group of respondents (percent)

%	All	Under 21	21-30	31-40	41-50	50 plus
All	100.0	0.2	4.0	14.6	32.5	48.8
2014	100.0	0.0	3.7	9.9	29.8	56.5
2017	100.0	0.0	3.7	14.2	33.6	48.5
2019	100.0	0.6	4.4	19.6	34.2	41.1

Industry segments

Exhibit 3 summarises the percentage of responses from each industry segment across the three survey periods.

Responses from some industry segments have reduced quite notably in 2019 compared to previous years, including the Business Professional and Commercial Services segment (from nearly a third of responses in 2014 and 2017 to 16% in 2019), the Services Trades, Electricity, Gas, Construction and Wholesale Trade segment (7.5% in 2019 compared to 19% in 2017), and the Manufacturing, Transport and Storage segment (6.3% in 2019 compared to 9.4% in 2017, 10% in 2014).

Some industry segments have remained fairly consistent across the three survey periods, including the Other Services segment, and the Primary Industry segment. The latter had few responses each year. The Government, Education and Community Services segment, and the Retail Trade segment are quite consistent in 2014 and 2019, but with a drop in the proportion of responses in 2017.

Responses from the Accommodation and Food Services segment increased in 2019 (19.5%) compared to previous years (3.3% in 2014, 0.9% in 2017). This can be explained by the new survey distribution method, which was outlined in the Methodology section.

Exhibit 3: Industry segment composition by year

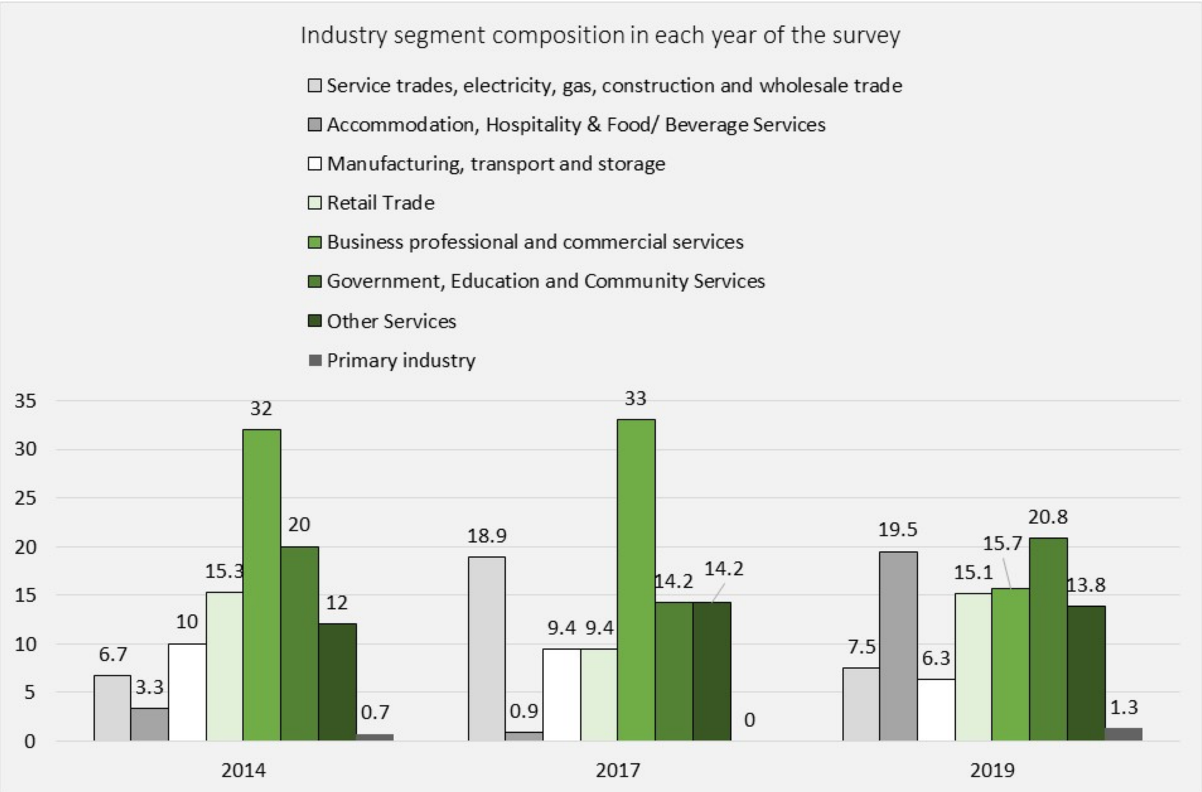


Table 7: Industry segment composition by year (percent)

	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
Service trades, electricity, gas, construction and wholesale trade	10.1	6.7	18.9	7.5
Accommodation, Hospitality & Food/ Beverage Services	8.9	3.3	0.9	19.5
Manufacturing, transport and storage	8.4	10.0	9.4	6.3
Retail Trade	13.7	15.3	9.4	15.1
Business professional and commercial services	26.0	32.0	33.0	15.7
Government, Education and Community Services	18.8	20.0	14.2	20.8
Other Services	13.3	12.0	14.2	13.8
Primary industry	0.7	0.7	0.0	1.3

Note: Rounding of percentages may allow totals to exceed 100%.

Employees and employment

Business respondents were asked about the total number of people employed in the business (including the owner), for a breakdown of employees in categories (volunteers, part-time, casual, full-time and apprentice or trainee), about how many additional employees the business was planning to hire over the next two years, and about the likelihood of the business reducing its labour force in the next two years.

The median number of employees in a business was five in 2017 and 2019, maintaining the same level as 2017, but increasing from four employees in 2014.

Across all survey periods, most entities were micro businesses, employing between 1 to 5 employees, including the owner. The proportion of micro businesses responding to the survey increased slightly in the 2019 survey (55%, 54%, and 60% respectively for the 2014, 2017, and 2019 surveys).

Businesses with 6-10 employees were the next largest group represented, but there has been a decline in respondents from this group each year (25% 20%, and 17% in 2014, 2017 and 2019 respectively).

The proportion of businesses with 21 or more employees increased to 8% in 2014 and has remained at 10% in both 2017 and 2019.

Table 8: Number of employees (percent)

%	2014	2017	2019
All	100.0	100.0	100.0
1-5 employees	54.7	53.8	59.6
6-10 employees	25.3	20.2	17.3
11-20 employees	12.0	16.0	13.5
21-50 employees	5.3	6.7	5.1
51+ employees	2.7	3.4	4.5

Table 9: Number of employees (summary statistics)

YEAR	All	2014	2017	2019
Count	416	147	117	152
Mean	13.0	13.1	13.0	12.8
St Dev	42.7	51.8	35.1	38.2
Skew	8.8	8.9	7.5	8.1
Min	0	0	0	1
Q1	2	2	2	2
Median	5	4	5	5
Q3	10	9	11	10
Max	550	550	340	400

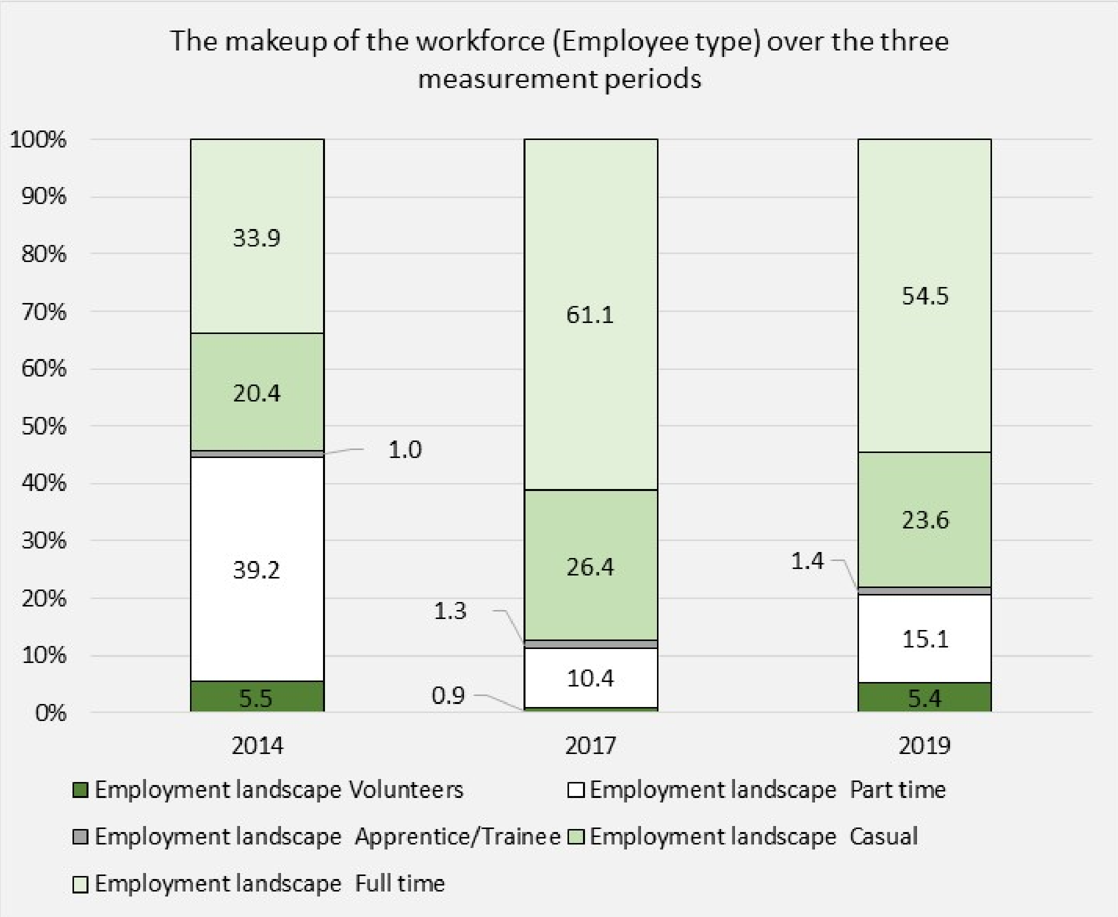
On average across the three survey periods, most businesses employed full-time (49% of businesses) and part-time staff (22% of businesses). The proportion of businesses employing full-time staff fluctuated upwards from 34% of businesses in 2014, to 61% in 2017, to become 55% of businesses in 2019.

Thirty-nine percent of businesses employed part-time staff in 2014, decreasing to 10% in 2017, but increasing to 15% in 2019. The employment of casual staff has remained fairly consistent with around 23% of businesses employing in this manner. The use of volunteers was the same in 2014 and 2019, but dipped in 2017. The proportion of businesses employing apprentices/trainees is broadly consistent, starting at 1% in all surveys.

Table 10: Employment landscape (percent)

%	Volunteers	Part time	Apprentice/Trainee	Casual	Full time	Total
2014	5.5	39.2	1.0	20.4	33.9	100
2017	0.9	10.4	1.3	26.4	61.1	100
2019	5.4	15.1	1.4	23.6	54.5	100
Total	4.1	22.3	1.2	23.2	49.1	100

Exhibit 4: Composition of the workforce (type of employee)



In 2019, approximately 67% of businesses indicated they were seeking to hire new staff. This is a continuation of the upward trend from 50% of businesses in 2014 and 63% of the businesses in 2017 indicating that they would increase their number of employees.

The proportion of businesses indicating they would take on between one and five additional employees has increased in each survey period, from 45% in 2014, to 53% in 2017, and 59% in 2019. This compares to a peak in the proportion of business indicating they would take on between six and nine employees in 2017 (7% of businesses), up from 3% in 2014, but reduced to 5% in 2019. The proportion of firms suggesting they will take on more than 10 new staff increased from 3% to approximately 4% from 2017 to 2019. Overall, respondents suggest that businesses will take on new staff in three of the four employment ranges.

The proportion of businesses reporting they are likely to take on *no* employees has declined from approximately 50% of businesses in 2014, to 37% in 2017, and declined slightly further to be a third of business in 2019 (33%).

Conversely, in 2019, 12% of businesses reported they were likely to *reduce* their labour force. This proportion was up from a trough in 2017 (3%), but similar to 2014 (13%). The three-year trend shows that the proportion of businesses indicating they will *not* reduce their labour force fluctuates by approximately 10 percentage-points around an average of 90% of businesses.

Exhibit 5: Businesses planning to hire new employees

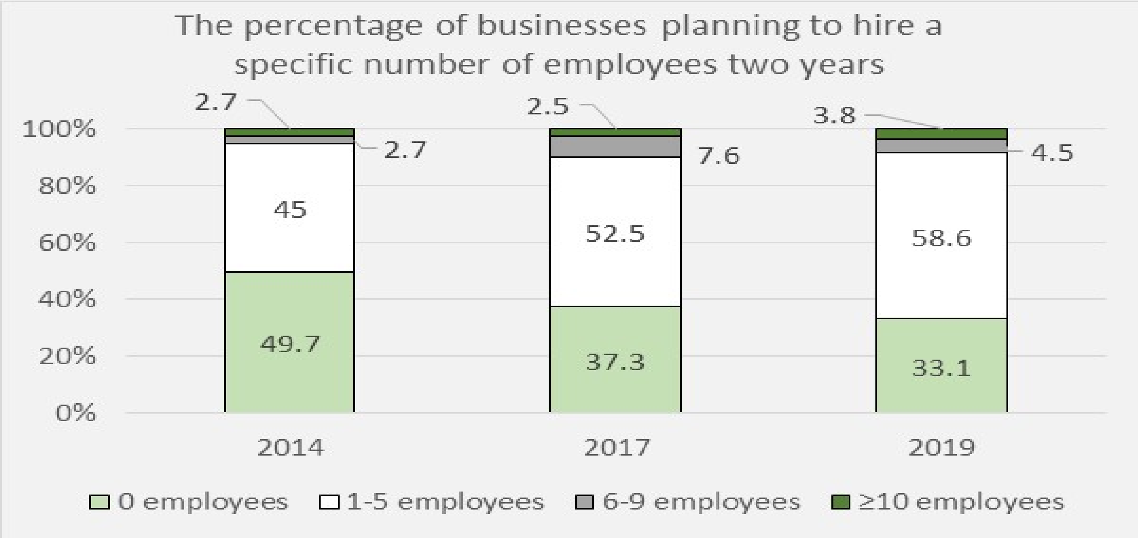


Table 11: Number of additional employees to be hired over the next two years (percent)

%	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
0 employees	40.1	49.7	37.3	33.1
1-5 employees	52.1	45.0	52.5	58.6
6-9 employees	4.7	2.6	7.6	4.5
≥10 employees	3.1	2.6	2.5	3.8

Table 12: Likelihood of reducing the labour force in the next two years (percent)

%	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
No	89.8	86.9	96.6	87.6
Yes	10.2	13.1	3.4	12.4

Business growth - expansion

Respondents were asked if they planned to expand their business over the next three years. This could include opening a new store, increasing the size of their current location, and moving to a larger location. Respondents were also asked about the *amount* of potential growth they anticipated over the next three years. Additionally, respondents were also asked about how they feel about the next 12 months regarding the position of their business.

In 2019, 58% of respondents indicated that they did not plan to expand their business in the next three years.

Table 13: Proportion of businesses planning to expand (percent)

	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
No	57.8	60.0	54.9	57.8
Yes	42.2	40.0	45.1	42.2

Of the 68 respondents in 2019 who planned to expand their business over the next three years, 41% believed there was moderate potential for growth. Approximately 22% believed the potential for growth was "between moderate and great" and another 21% believed there was "great" potential. Collectively, more than 80% of respondents who planned to expand their business over the next three years thought the potential for this growth was moderate or greater.

Table 14: Degree of business anticipation of growth potential (count and percent)

Potential for growth	Yes (count, percent)		No (count, percent)		Total
Very little	3	4%	10	11%	13 (8%)
2	8	12%	7	8%	15 (9%)
Moderate	28	41%	13	14%	41 (25%)
4	15	22%	4	4%	19 (12%)
Great	14	21%	1	1%	15 (9%)
No answer	0		58	62%	58 (36%)
	68 (42%)	**100%**	**93 (58%)**	**100%**	**161**

Of the 42% of respondents who planned to expand their business over the next three years, the industry breakdown in Table 15 shows that expansion was more commonly indicated by respondents in the 'Manufacturing, Transport and Storage', and 'Retail Trade' sectors. By contrast, more than three quarters of the respondents from the 'Business Professional and Commercial Services' stated they had no plans to expand in the next three years.

The results in Table 15 show that the proportion of respondents who planned to expand their business within three years fell between 2017 and 2019 in all industry sectors except 'Manufacturing, Transport and Storage' and 'Retail Trade'.

Table 15: Proportion of businesses planning to expand in the next three years (percent, count)

Industry Sector		No (%, n)	Yes (%, n)
Accommodation, Hospitality & Food/ Beverage Services		61.1% (22)	38.9% (14)
	2014	50% (2)	50% (2)
	2017	0% (0)	100% (1)
	2019	64.5% (20)	35.5% (11)
Business professional and commercial services		61.9% (65)	38.1% (40)
	2014	66% (31)	34% (16)
	2017	45.5% (15)	54.5% (18)
	2019	76% (19)	24% (6)
Government, Education and Community Services		51.9% (40)	48.1% (37)
	2014	44.8% (13)	55.2% (16)
	2017	53.3% (8)	46.7% (7)
	2019	57.6% (19)	42.4% (14)
Manufacturing, transport and storage		42.9% (15)	57.1% (20)
	2014	53.3% (8)	46.7% (7)
	2017	40% (4)	60% (6)
	2019	30% (3)	70% (7)
Other Services		56.4% (31)	43.6% (24)
	2014	55.6% (10)	44.4% (8)
	2017	53.3% (8)	46.7% (7)
	2019	59.1% (13)	40.9% (9)
Primary industry		66.7% (2)	33.3% (1)
	2014	100% (1)	0% ()
	2019	50% (1)	50% (1)
Retail Trade		54.4% (31)	45.6% (26)
	2014	60.9% (14)	39.1% (9)
	2017	80% (8)	20% (2)
	2019	37.5% (9)	62.5% (15)
Service trades, electricity, gas, construction and wholesale trade		68.3% (28)	31.7% (13)
	2014	80% (8)	20% (2)
	2017	63.2% (12)	36.8% (7)
	2019	66.7% (8)	33.3% (4)
Grand Total		57.2% (234)	42.8% (175)

In the 2019 survey, respondents were asked to provide a free-text or open comment about how they feel about the next 12 months regarding the position of their business. The comments from the 156 respondents who answered this question were coded as being positive, neutral or negative.

Positive or somewhat positive responses were provided by 57% of the respondents. Many comments were short and general statements including “positive”, “somewhat positive”, “very positive”, “good”, “confident”, and “Ok”. Some respondents said their positivity is due to expectations of growth, including the comments “expected to double”, “forecast good”, “healthy financial growth”, “planning for expansion”, and “higher demand than capacity”.

A further 18% of respondents were more neutral with comments including “average”, “neutral”, “ambivalent”, “steady”, and “stable”. For some of these respondents, their neutrality was caused by uncertainty around the Federal election results at the time of the survey. Others clarified their neutrality with comments including “consolidate our financial position”, “plan is to survive”, “hopefully construction improves”, “too early to say”, and “currently reassessing options”.

The remaining one quarter of respondents (25%) expressed negative expectations about their business over the next 12 months, with short statements including “negative”, “not good”, “worried”, “very worried”, “slow”, “probably decrease”, “tough times”. Some respondents elaborated on the reasons for their negative outlook, including concerns about the economy, rising costs of business (e.g. rent, staff costs) and small margins, and increasing competition. Other comments related to expectations that growth with slow or remain unchanged, or that their business opportunities will instead reduce due to limited outlook on sales and profit.

Business location

Respondents were asked about their business location, such as if their business had ever been home-based, about the type of ownership of the business premise, and what was, or were, the reasons for choosing the *City of Whitehorse* as the operational site for their business.

Most businesses in 2019 (62%) indicated they operated from leased commercial premises. The proportion of business in *purchased* commercial premised remained at approximately 19% in 2014 and 2017, but fell to 16% of businesses in 2019. In the same period, the proportion of businesses in *leased* commercial premises remained at approximately the same level across 2017 and 2019, but increased from 2014 (61% and 62%, 55%, respectively).

The proportion of businesses that were home-based decreased from 2017 to 2019 (47% to 37%, respectively). Of the 37% of businesses that indicated in 2019 that they are, or were, home based, 22% of them indicated that they continued to be home based from 2019.

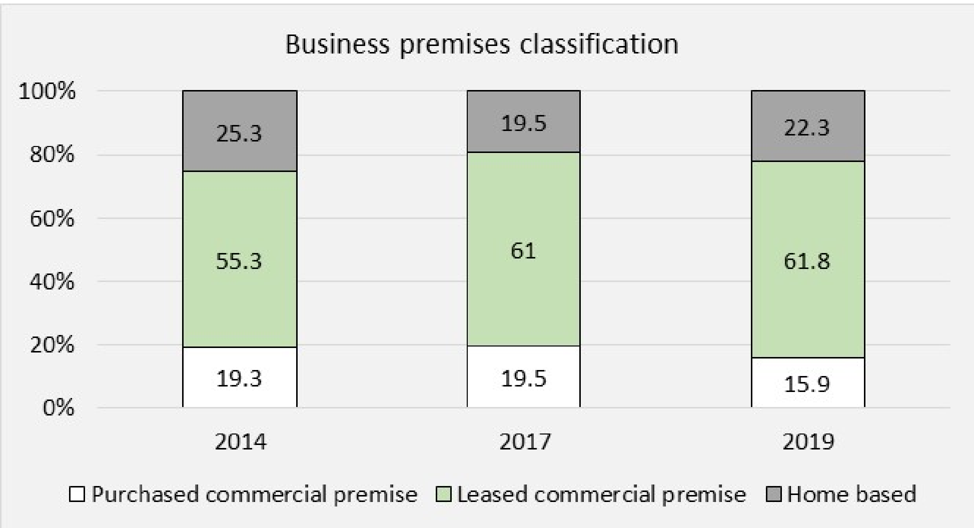
Table 16: Home-based businesses (percent)

	All	2014	2017	2019
All	100.0	100.00	100.0	100.0
No	56.8	53.95	52.5	62.7
Yes	43.2	46.05	47.5	37.3

Table 17: Business premises classification (percent)

	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
Purchased commercial premise	18.1	19.3	19.5	15.9
Leased commercial premise	59.3	55.3	61.0	61.8
Home based	22.6	25.3	19.5	22.3

Exhibit 6: Business premise classifications



The proportions of business choosing the *City of Whitehorse* has remained fairly constant over the three survey periods *for all the types of reasons*, such as connection with the area, potential for growth, and lifestyle. Location was the prime reason for choosing the *City of Whitehorse*. This was 59% of businesses in 2019, an increase from 51% of businesses in 2014. Having an existing family business as a reason for choosing the *City of Whitehorse* has remained fairly constant, averaging 14% of businesses over the three surveys.

Although 'Location and Connection with the Area' have remained as the top-two ranked reasons for choosing the *City of Whitehorse*, other reasons have moved slightly in importance. Examples include 'Infrastructure' and 'Potential for Growth' which moved up and down in the ranking of reasons for choosing the *City of Whitehorse*.

Respondents were also given the option to provide free-text comment about *other reasons* they chose the *City of Whitehorse* for their business location. Themes emerging from these respondents were about the availability of building and offices, cheap rent, and conducting home-based businesses.

Twenty-one percent of business owners and managers indicated they would consider moving their business into a shared workspace or co-working space facility. Although no respondents provided reasons why they *would* move their business, several provided free-form responses about why they would *not move* into a shared *space*. These reasons included needing control over the workspace and requiring a confidential space for clients.

Exhibit 7: Reasons for choosing the City of Whitehorse

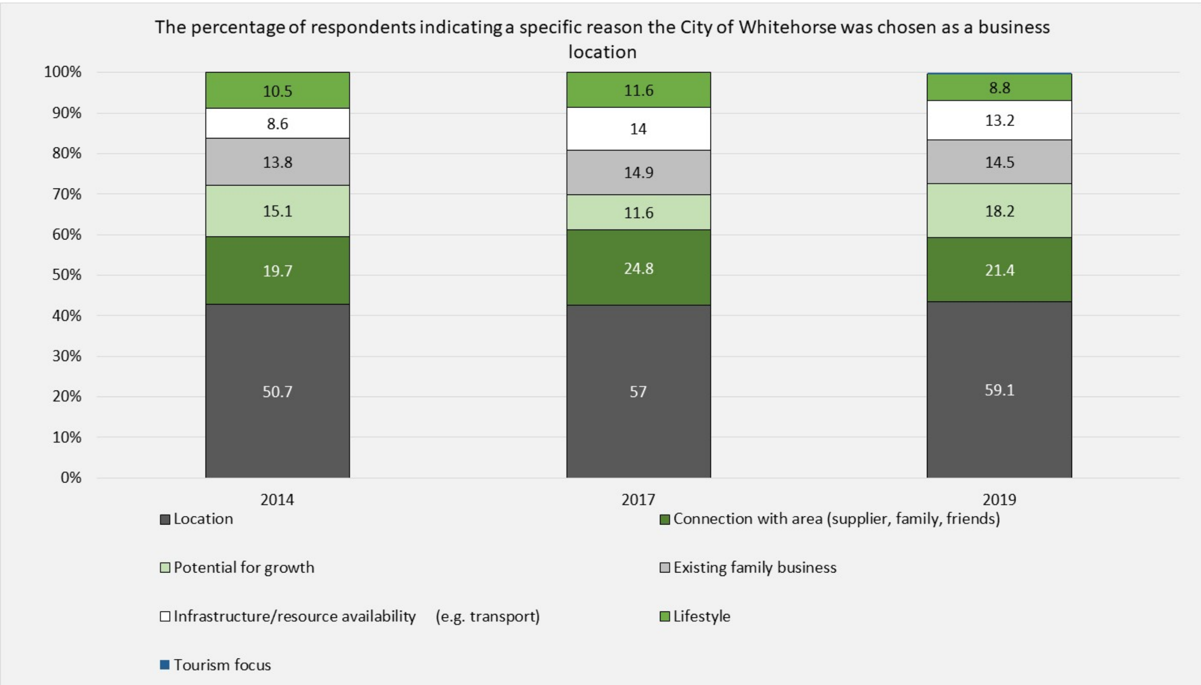


Table 18: Reasons for choosing the City of Whitehorse (percent)

PERCENT	2014	2017	2019
Existing family business	13.8	14.9	14.5
Lifestyle	10.5	11.6	8.8
Infrastructure/resource availability (e.g. transport)	8.6	14.0	13.2
Connection with area (supplier, family, friends)	19.7	24.8	21.4
Potential for growth	15.1	11.6	18.2
Tourism focus	0.0	0.0	0.6
Location	50.7	57.0	59.1
Note: Multiple responses are allowed across categories; totals may exceed 100%			

Table 19: Reasons for choosing the City of Whitehorse (ranking by 2019 percent)

Characteristic	2014	2017	2019
Location	50.7	57.0	59.1
Connection with area (supplier, family, friends)	19.7	24.8	21.4
Potential for growth	15.1	11.6	18.2
Existing family business	13.8	14.9	14.5
Infrastructure/resource availability (e.g. transport)	8.6	14.0	13.2
Lifestyle	10.5	11.6	8.8
Tourism focus	0.0	0.0	0.6

Table 20: Changes in reasons for choosing the City of Whitehorse (rankings)

Rank	2014	2017	2019
1.	Location	Location	Location
2.	Connection	Connection	Connection
3.	Potential for growth	Existing family business	Potential for growth
4.	Existing family business	Infrastructure	Existing family business
5.	Lifestyle	• Potential for growth • Lifestyle	Infrastructure
6.	Infrastructure		Lifestyle
7.	Tourism focus	Tourism focus	Tourism focus

Customer markets[3]

Respondents to the 2019 survey were asked how important various customer markets were to their business. They could answer in more than one category.

Having local customers was considered important or very important for nearly half of the businesses surveyed (48%), with approximately a third of businesses stating that local customers were very important (34%).

Table 21: Importance of customer markets to businesses (percent)

	Count	Not Important	Somewhat Important	Important	Very Important	Combined Important & Very important
Local (10kms)	157	10	12	14	34	48
Northern suburbs	54	56	0	26	19	45
South Eastern Suburbs	114	21	0	42	37	79
Western suburbs	73	68	0	25	7	32
Victoria	108	34	0	31	35	66
Interstate	119	62	0	19	19	38
International	145	65	9	6	20	26

Table 22: Importance of Local suburb customer markets to businesses (percent)

	All	Not Important	Somewhat Import	Important	Very Important
Count	157	16	19	22	100
Proportion	1	0.10	0.12	0.14	0.64
Percentage	100	10.2	12.1	14.0	63.7

The respondents were asked about the importance of customer markets in different suburban regions of Melbourne. The combined percentage of businesses considering it was important or very important to have customers in the Northern suburbs was 45%, which was similar to proportion of respondents considering Local customers to be important or very important (48%).

There were differences when comparing the importance of customer markets between the Northern and Western suburbs. Having customers in the Northern and in the Western suburbs was important for approximately a quarter of businesses (25% and 26%). Having customers in the Northern suburbs was very important for approximately a fifth of businesses, whereas having customers in the Western suburbs was very important for only seven percent of businesses.

Most businesses (66%) considered it was important or very important to have Victoria as a market for customers. Similar proportions of businesses considered Victoria to be important and very important customer markets (31% and 35% respectively).

[3] Respondents were asked where their business sourced the majority of its supplies. It was not possible to analyse the responses to this question because most respondents select two options. As a consequence, the responses cannot be differentiated to provide a meaningful analysis of the question. A question about the 'majority' should only have a single response for the analysis to be meaningful.

Table 23: Importance of Northern suburb customer markets to businesses (percent)

	All	Not Important	Somewhat Import	Important	Very Important
Count	97	54	0	25	18
Proportion	1	0.56	0.00	0.26	0.19
Percentage	100	55.7	0.0	25.8	18.6

Table 24: Importance of South Eastern suburb customer markets to businesses (percent)

	All	Not Important	Somewhat Import	Important	Very Important
Count	114	24	0	48	42
Proportion	1	0.21	0.00	0.42	0.37
Percentage	100	21.05	0.0	42.1	36.8

Table 25: Importance of Western suburb customer markets to businesses (percent)

	All	Not Important	Somewhat Import	Important	Very Important
Count	108	73	0	27	8
Proportion	1	0.68	0.00	0.25	0.07
Percentage	100	67.6	0.0	25.0	7.4

Table 26: Importance of Victorian customer markets to businesses (percent)

	All	Not Important	Somewhat Import	Important	Very Important
Count	108	37	0	33	38
Proportion	1	0.34	0.00	0.31	0.35
Percentage	100	34.3	0.0	30.6	35.2

Thirty-eight percent of business considered Interstate markets to be important or very important. Equal proportions considered Interstate markets to be important and very important (19% each). The proportion of businesses that considered Interstate customer markets to be important or very important is less than the proportion thinking the same about Victorian markets (38% compared to 66%).

Table 27: Importance of Interstate customer markets to businesses (percent)

	All	Not Important	Somewhat Import	Important	Very Important
Count	119	74	0	22	23
Proportion	1	0.62	0.00	0.18	0.19
Percentage	100	62.2	0.0	18.5	19.3

International markets were considered important or very important by approximately a quarter of businesses (26%), although 20% considered international markets to very important rather than important (6%).

Table 28: Importance of International customer markets to businesses (percent)

	All	Not Important	Important	Very Important	Somewhat Important
Count	145	94	13	9	29
Proportion	1	0.65	0.09	0.06	0.20
Percentage	100	64.8	9.0	6.2	20.0

E-commerce

Respondents were asked about the amount of their business that was conducted online. The proportion of businesses doing *at least some trading* online has increased to 100% over the six year period covered by the three surveys. Conversely, the proportion of businesses conducting *no* online trading has decreased from 31% in 2014, to 27% in 2017, and then declined further to nothing in 2019.

The proportion of firms generating up to 20% of their trade online has increased dramatically from 39% of businesses in 2014 to 58% in 2019. The online trade category of "1%-20%" has accounted for the greatest proportion of businesses across the three surveys (39%, 43%, and 58%). The 2019 survey was the first time any online trade category accounted for more than half of the businesses represented in the survey (58%), noting that this category was between "1% and 20%" of a business's online trading.

The proportion of businesses generating between 21% and 40% of their trade online increased remarkably over the 2014-2019 period, from 13% (2014), 8% (2017) and 20% (2019).

The proportions of businesses generating between "41% and 60%" and "61% to 80%" of their trade online remained fairly constant over the six-year period. Here, trade fluctuated around 8% for the "41% to 60%" online trade category and around 6% for the "61% to 80%" category.

Between 2014 and 2019 the proportion of business conducting more than 80% of their business online has more than doubled to 9%. Although, the proportion of firms that generated more than 80% of their trade online doubled from 2014 to 2017 (4% to 9%), it has remained at slightly less than 9% in 2019.

Interestingly, there is no relationship between the age of a business and how much business it conducts online. In other words, trading online is not the provenance of young *or* old businesses – businesses of all ages are now likely to be conducting business online. Similarly, the conduct of online business is not the exclusive domain of certain industry sectors. All industry segments conduct at least some business online.

Exhibit 8: Business conducted online

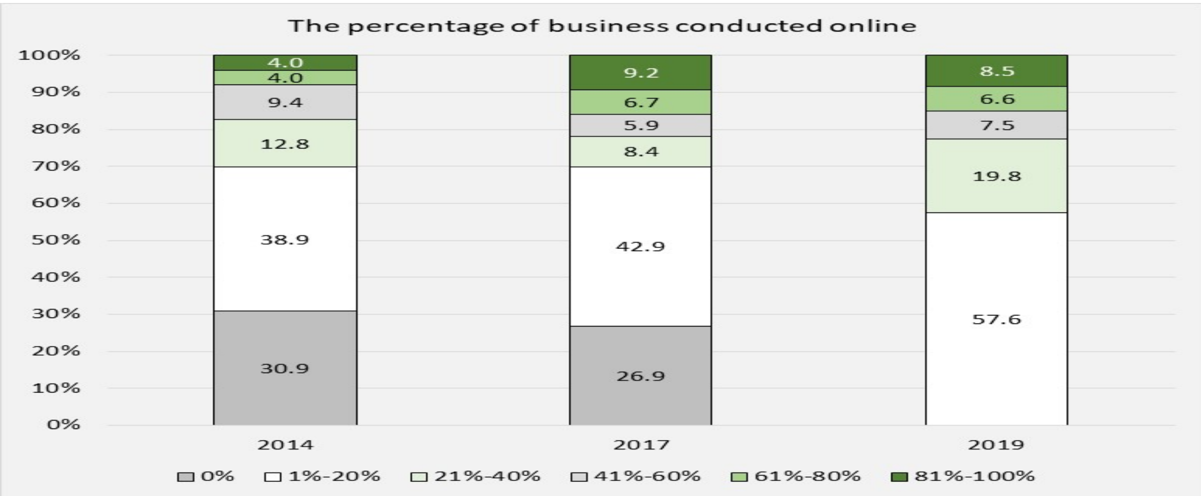


Table 29: Business conducted online by industry sector, combining 2014, 2017 and 2019 (count)

	All	Service trades, electricity, gas, construction and wholesale trade	Accommodation, Hospitality & Food/ Beverage Services	Manufacturing, transport and storage	Retail Trade	Business professional and commercial services	Government, Education and Community Services	Other Services	Primary industry
All	358	37	24	31	45	104	67	47	3
0%	73	6	2	3	12	22	18	9	1
1%-20%	164	19	15	18	20	35	36	20	1
21%-40%	48	8	4	5	5	13	3	10	0
41%-60%	27	2	2	2	3	10	7	1	0
61%-80%	20	1	1	2	2	11	0	3	0
81%-100%	26	1	0	1	3	13	3	4	1

Table 30: Business conducted online by industry sector, combining 2014, 2017 and 2019 (percent)

	All	Service trades, electricity, gas, construction and wholesale trade	Accommodation, Hospitality & Food/ Beverage Services	Manufacturing, transport and storage	Retail Trade	Business professional and commercial services	Government, Education and Community Services	Other Services	Primary industry
All	100	100	100	100	100	100	100	100	100
0%	20.39	16.2	8.3	9.7	26.7	21.2	26.9	19.1	33.3
1%-20%	45.81	51.4	62.5	58.1	44.4	33.7	53.7	42.6	33.3
21%-40%	13.41	21.6	16.7	16.1	11.1	12.5	4.5	21.3	0.0
41%-60%	7.542	5.4	8.3	6.5	6.7	9.6	10.4	2.1	0.0
61%-80%	5.587	2.7	4.2	6.5	4.4	10.6	0.0	6.4	0.0
81%-100%	7.263	2.7	0.0	3.2	6.7	12.5	4.5	8.5	33.3

Table 31: Percentage of business conducted online (percent)

	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
0%	20.9	30.9	26.9	0.0
1%-20%	45.45	38.9	42.9	57.5
21%-40%	13.4	12.75	8.4	19.8
41%-60%	7.8	9.4	5.9	7.5
61%-80%	5.6	4.0	6.7	6.6
81%-100%	7.0	4.0	9.2	8.5

Table 32: Percentage of business conducted online by business age, combining 2014, 2017 and 2019 (count)

	All	0%	1%-20%	21%-40%	41%-60%	61%-80%	81%-100%
All	374	78	170	50	29	21	26
< 6 months	16	4	10	1			1
6 months to 1 year	26	6	11	5	2		2
2-5 years	81	13	36	7	7	9	9
6-10 years	41	6	18	8	5	1	3
11-20 years	72	15	27	10	6	5	9
>20 years	136	33	68	18	9	6	2

Table 33: Percentage of business conducted online by business age, combining 2014, 2017 and 2019 (percent)

	All	0%	1%-20%	21%-40%	41%-60%	61%-80%	81%-100%
All	100.0	20.9	45.5	13.4	7.8	5.6	7.0
< 6 months	100.0	25.0	62.5	6.3	0.0	0.0	6.3
6 months to 1 year	100.0	23.1	42.3	19.2	7.7	0.0	7.7
2-5 years	100.0	16.0	44.4	8.6	8.6	11.1	11.1
6-10 years	100.0	14.6	43.9	19.5	12.2	2.4	7.3
11-20 years	100.0	20.8	37.5	13.9	8.3	6.9	12.5
>20 years	100.0	24.3	50.0	13.2	6.6	4.4	1.5

Duration of a business

Respondents were asked about the duration their business had been operating. Fifty-six percent of businesses have been operating for more than five years. Compared to the 2014 survey period , the 2019 survey results show there were declines in the proportions of businesses operating in four of the six business-age categories. These included: (i) businesses operating for less than six months, (ii) those operating between six and 10 years, (iii) those operating between 11 and 20 years, and (iv) those in business for more than 20 years. In the same period, there were increases in the proportions for only those businesses operating between six months and one year and for those operating between two and five years.

Two particularly noticeable changes over the survey periods were the decline in the proportion of businesses older than 20 years (decreasing 10 percentage points from 37 to 27 percent), and the increase in businesses aged between two and five years (increasing 13 percentage points from 18 to 31%).

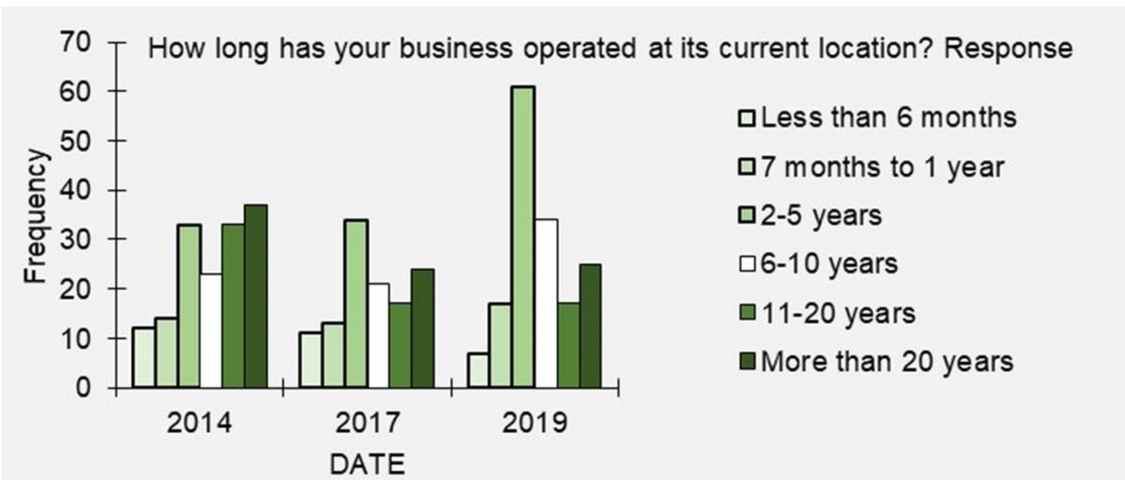
There may be implications arising from the age profile of businesses. These implications include differences in the type of support required for businesses operating in different age categories, the level of employment for local populations, the type of local employment, council revenues, business service needs, etc. Surviving at least five years is frequently seen as a critical milestone for a business.

The survey results show nearly three-quarters of businesses in 2014 (70%) were more than five years old, but the proportion was declining towards half of businesses in 2019 (57%).

Table 34: Length of business operation (percent)

%	All	Less than 6 months	7 months to 1 year	2-5 years	6-10 years	11-20 years	More than 20 years
All	100.0	100.0	100.0	100.0	100.0	100.0	100.0
2014	35.1	40.0	31.8	25.8	29.5	49.25	43.0
2017	27.7	36.7	29.55	26.6	26.9	25.4	27.9
2019	37.2	23.3	38.6	47.7	43.6	25.4	29.1

Exhibit 9: Length of business operation in its current location



Business planning

Respondents were asked about the number of hours they spend on business planning each week. The average number of hours spent planning each week increased by approximately 30 percent, from 13 hours in 2014 and 2017 to 17 hours in 2019.

There was a *decline* across the three surveys in the proportion of managers spending less than three hours planning each week (27% in 2014, 21% in 2017, 15% in 2019). This decline was reflected in a similar *increase* in the proportion of managers spending *11 or more* hours planning each week (27% in 2014, 26% in 2017, 37% in 2019). The proportion of managers spending between *3 and 10 hours* planning each week peaked at 53% in 2017, but declined in 2019 to be similar to the 2014 level (46% in 2014, 48% in 2019).

Noticeably, there were increases in the number of hours spent planning for those businesses already spending more than 10 hours a week planning. The proportion of businesses spending between *11 and 40 hours* a week planning increased from 19% of businesses in both 2014 and 2017 to 24% of businesses in 2019; such that slightly more than a quarter of businesses are now spending between *11 and 40* hours a week planning.

The proportion of businesses spending at least 11 hours planning each week has increased from 27% in 2014 to 37% in 2019. In 2019, approximately half of the business managers or owners were spending between 3 and 10 hours a week planning.

Table 35: Weekly number of hours spent planning (percent)

PERCENT	2014	2017	2019
Less than 3 hours	27.2	21.1	14.9
3-10 hours	45.6	52.6	48.0
11-40 hours	19.1	19.3	24.3
41-65 hours	7.4	4.4	11.5
66 hours or more	0.7	2.6	1.4
	100.0	100.0	100.0
Max hours	80	98	90
Average hours	13	13	17

Business advice

Respondents were asked whether they sought business advisory assistance from any of the sources listed in the following table, about how they prefer to receive relevant information about their business, about the business groups of which they were members, and about areas of their business for which they require assistance.

Accountants were the dominant source of advice in all three surveys, with a significant increase in seeking their advice between 2014 (63%) to 2017 (80%) that has been maintained in 2019 (87%).

Just over a third of all respondents in 2017 and 2019 (34%) sought advice from lawyers, who were also the second most common sources. This is in contrast to 2014 when lawyers were the third most common source of advice. This may reflect that all respondents indicated they engaged in some form of e-commerce, and many indicating business growth, which implies legal advice is needed when entering new markets online.

There was a significant increase in the proportion of businesses seeking advice from the Whitehorse City Council, from a low of 6% in 2014 to 17% in 2019. This increase moved the Whitehorse City Council from the least common source of advice, to the second least common source after financial advisors in 2019.

A few respondents in 2019 stated 'other' in addition to or instead of the options listed in the table below. The more common responses were family and friends (5 responses), industry groups or mentors (4 responses), and customers or suppliers (4 responses).

Table 36: Source of business advice (percent)

PERCENT	2014	2017	2019
Accountant	63.0	80.0	86.8
Lawyer	14.8	34.3	33.8
Financial advisor	14.8	18.1	13.9
Whitehorse City Council	5.9	10.5	17.2
Business groups	24.4	27.6	25.8
Note: Multiple responses are allowed across categories; totals may exceed 100%			

Over the three surveys, business groups have continued to be a source of advice for approximately a quarter of the businesses (24%, 28% and 26% respectively in 2014, 2017 and 2019). Respondents were asked to specify the business groups from which they received support, where applicable. Of the 32 respondents who responded in the 2019 survey, the most common (16 respondents or 50%) was that the business was only a member of one or more industry-specific business group. A further 9 respondents identified non-industry business groups including the Australian Industry Group, Biz Chicks, CEO Group, and the Manningham Business Net Work. One of these nine respondents identified the Whitehorse Business Group, and a further three respondents only identified this business group. Four other respondents mentioned their franchisor group or the more general Franchise Council of Australia.

A new question in the 2019 survey was the method respondents preferred for receiving information about their business. The majority of respondents (68%) indicated that email was most preferred, with the second preferred method also being electronic (i.e. newsletters at 29%). Interestingly, mail is still a preferred method for over one quarter of businesses (26%). Social media and the web were the least favoured methods (both 10%).

Table 37: Preference for receiving information (count, percent)

	Count	Percent
Email	104	68.0
Electronic newsletters/ enewsletter	44	28.8
Social media	15	9.8
Mail	40	26.1
Web	15	9.8
Note: Multiple responses are allowed across categories; totals may exceed 100%		

In the 2019 survey, respondents were asked if they needed assistance for their business, with 63% stating that they did. The most common theme related to advertising, marketing, fighting against (overseas) competition and increasing sales/clients, with 42% of those requiring assistance commenting on this theme. Related themes were 11% of businesses needing help with online marketing, and 9% of businesses wanting advice on business direction, planning, strategy, economic trends in the *City of Whitehorse*, and growth or export options.

Another theme from 18% of those requiring assistance related to help with improving cash flow and financial support, with accessing government grants or contracts, or with reducing costs (e.g. rent, taxation).

Approximately 14% of businesses requiring assistance requested help with recruiting staff (e.g. attracting staff to work in the *City of Whitehorse*, finding reliable staff, and finding interns), and training opportunities for staff (e.g. specialised training, low cost training, staff development).

Eight percent of businesses requiring assistance wanted help with addressing parking issues, including options for increasing parking for customers and addressing parking problems caused by rezoning in their area.

Seven percent of the respondents stated that they required assistance with networking (e.g. with local businesses) or business workshops, or from mentors. A related theme was 6% of businesses wanting to help with local community engagement, including connections with the Chinese community or locals in general.

Council services and programs

The survey tracked the use of various services provided by the *Whitehorse City Council*. These included the *Wbiz* website, the *Down to Business* newsletter, the *Think Local, Buy Local* campaign, the *Festive Window Dressing Competition*, *Whitehorse Business Week*, the *Boost Your Business* program, *Business Mentoring* sessions, workshops and seminars, and the *Whitehorse Tertiary Business Skills* program.

Respondents were asked which of the preceding services or programs offered by the *Whitehorse City Council* they were aware and unaware of, and which services they had used. It is important to note that the level of awareness of services would be expected to increase over time. The questionnaire asked respondents which services they had made use of, rather than which services they *had used* in the current survey period (i.e., 2017 to 2019). This means that responses regarding "use" of the services do not necessarily reflect usage within a particular timeframe, and could mean any use in any year in the past.

Overall, no program had an awareness level greater than 50% among respondents. The highest take-up of programs was one-fifth of respondents for the *Workshops and Seminars*.

Whitehorse City Council service offerings were ranked, based on the 2019 survey results, according to the level of engagement the respondents had with each service. That is, whether they used the service, were aware of but did not use the service, or were unaware of the service. For each service, a respondent could only be in one of these three levels of engagement with that service. For example, if a respondent was unaware of a service, by definition they could not be in the aware or use categories for that service. Similarly, respondents who were categorised as "aware" for a service were separated from those who used the service, because being aware of a service does not necessarily mean the respondent used the service. Although awareness is a critical determinant of the use of a service, it appears that factors other than awareness influence their use. For example, *Workshops and Seminars* ranked highest in terms of the proportion of businesses using them, but fourth in the level of awareness. Forty-three per cent of business owners were aware of the *Workshops and Seminars* program (but did not use the service), with 18% reporting they had used them. Similar differences in ranking are also evident for the other services. Unsurprisingly, these results suggest that factors other than awareness appear to contribute to usage of that service. Possibly, this may also reflect a program focusing and satisfying the needs of a narrow cohort of business operators.

Table 38: Awareness and use of workshops and seminars (percent and ranking)

	Awareness (% Descending)	Use Of (% Descending)	Unawareness (% Ascending)
1.	Whitehorse Business Week (52%)	Workshops and Seminars (18%)	Whitehorse Business Week (36%)
2.	Think Local Buy Local (43%)	Wbiz (14%)	Workshops And Seminars (43%)
3.	Festive Window Dressing Competition (41%)	Down To Business (13%)	Think Local Buy Local (47%)
4.	Workshops And Seminars (40%)	Whitehorse Business Week (12%)	Wbiz (49%)
5.	Wbiz (37%)	Think Local Buy Local (10%)	Festive Window Dressing Competition (52%)
6.	Business Mentoring (33%)	Business Mentoring (10%)	Down To Business (56%)
7.	Down To Business (32%)	Boost Your Business (9%)	Business Mentoring (57%)
8.	Boost Your Business (25%)	Festive Window Dressing Competition (7%)	Boost Your Business (66%)
9.	Whitehorse Tertiary Business Skills Program (21%)	Whitehorse Tertiary Business Skills Program (7%)	Whitehorse Tertiary Business Skills Program (73%)

Wbiz website

There was a decrease in the proportion of businesses that were aware of the Wbiz website from 54% to 37% and the proportion of businesses that were *unaware* of the website more than doubled from 21% to 49%. This was accompanied by a decrease in the proportion of businesses that used the Wbiz website, declining from 26% to 14%, although averaging approximately one-fifth of businesses. One possible explanation is that the results earlier in the report (see *Duration of a Business*) showed an increase in proportion of businesses aged between six months and five years, which suggests that newer businesses may not be learning about Wbiz. The fact that 'Accountants' are the dominant source of support for most businesses (see *Business Advice*), the results suggest a future strategy may be to ensure Wbiz targets accountants so they receive the information needed to be passed on to business clients, or they can direct clients to the Wbiz website.

Table 39: Awareness and use of Wbiz website (percent)

%	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
Aware of	45.9	53.9	47.8	37.1
Have made use of	19.9	25.5	20.9	13.9
Not aware of	34.2	20.6	31.3	49.0

Down to Business newsletter

The level of awareness of the *Down to Business* newsletter has decreased consistently between 2014 and 2019, from 44% to 32% of respondents having awareness. This was mirrored by the proportion of businesses that were unaware of the newsletter growing from 41% to 56%. Interestingly, in the same period, the proportion of businesses using the newsletter has remained fairly constant at an average of 13% of businesses. As noted about the Wbiz website analysis, this may reflect an increase in the proportion of younger businesses responding to the 2019 survey who have not learned about the existence of the *Down to Business* newsletter.

Table 40: Awareness and use of the Down to Business newsletter (percent)

%	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
Aware of	37.8	43.9	38.5	31.5
Have made use of	13.1	15.1	11.0	12.8
Not aware of	49.1	41.0	50.5	55.7

Think Local Buy Local campaign

The level of awareness of the *Think Local Buy Local* campaign declined over the five-year survey period from 50% to 43%, while at the same time the unawareness increased from 33% to 47%. The use of the *Think Local Buy Local* campaign also declined from 17% to 10%, averaging 12% between 2014 and 2019.

The decrease in the *use of Think Local Buy Local* campaign by businesses in the City of Whitehorse is similar in percentage points to the increase in the level *of unawareness*. The use of *Think and Buy Local* decreased 41 percentage points (by 7 percentage points from 17% to 10%) at the same time that unawareness increased 42 percentage points (by 14 percentage points from 33% to 47%).

Table 41: Awareness and use of the Think Local Buy Local campaign (percent)

%	**All**	**2014**	**2017**	**2019**
All	100.0	100.0	100.0	100.0
Aware of	46.2	49.6	46.4	42.9
Have made use of	12.1	17.3	8.2	10.2
Not aware of	41.7	33.1	45.5	46.9

Festive Window Dressing Competition

The level of awareness of the *Festive Window Dressing Competition* remained constant at 41% across 2017 and 2019, but was down from 53% in 2014. In the same period, the level of *unawareness* fell from 57% to 52% in 2019, but there was a higher level of *unawareness* than in 2014 (i.e. 41%). The use of the *Festive Window Dressing Competition* dipped from 2014 (6%) to 2% in 2017, to return to a level similar to 2014 in 2019 (7%).

Table 42: Awareness and use of the Festive window dressing competition (percent)

%	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
Aware of	45.1	53.0	41.1	40.8
Have made use of	5.2	6.0	1.9	6.8
Not aware of	49.7	41.0	57.0	52.4

Whitehorse Business Week

Between 2014 and 2017, the level of awareness of the *Whitehorse Business Week* fell two percentage points, from 59% to 57%. The decrease continued to 52% between 2017 and 2019, which is a further decrease of five percentage points. During 2014 to 2017, the use of (or participation in) *Whitehorse Business Week* decreased slightly from 21% to 18% (3 percentage points; 2014-2017), and decreased again to 12% in 2019 (6 percentage points). The level of unawareness has increased from 21% of businesses to 36% between 2014 and 2019.

The proportion of businesses awareness of and participating in the *Whitehorse Business Week* has declined in each survey period. By 2019, 12% of business had used *Whitehorse Business Week*. This was nearly half the proportion of 2014 (21%) and represents a drop compared to 2017 (18%), which is a drop of 9 percentage points between 2014 and 2019. The decline in the participation in the *Whitehorse Business Week* is consistent with changes in the levels of awareness and unawareness. The proportion of businesses aware of *Whitehorse Business Week* declined approximately 12 percent, from 59% to 52% of businesses between 2014 and 2019 (57% in 2017). This occurred during a time when the level of unawareness increased approximately 71 percent, from 21 to 36 percent of businesses.

Table 43: Awareness and use of the Whitehorse Business Week (percent)

%	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
Aware of	55.6	58.6	56.8	52.0
Have made use of	16.6	20.7	18.0	11.8
Not aware of	27.8	20.7	25.2	36.2

Boost Your Business

The level of awareness of *Boost Your Business* has declined from 36% to 25% during 2014 to 2019. Over the same time, the level of unawareness has remained on average around 61% for the three survey periods (59%, 57%, and 66%, respectively). Although the proportion of businesses using this program more than doubled from 5% to 12% between 2014 and 2017, its use declined from this peak to be 9% of businesses in 2019.

Table 44: Awareness and use of the Boost Your Business campaign (percent)

%	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
Aware of	30.6	35.5	31.9	24.8
Have made use of	8.3	5.1	11.5	9.0
Not aware of	61.1	59.4	56.6	66.2

Business Mentoring Sessions

The decline in the proportion of businesses awareness of the *Business Mentoring Sessions* from 45% in 2014 to 33% in 2019 was matched by an increase in unawareness from 44% to 57% among the businesses. The use of *Business Mentoring Sessions* remained very constant despite the steep decline in awareness and increase in unawareness. This suggests there is a core of businesses that derive benefit from mentoring sessions.

Table 45: Awareness and use of the Business Mentoring Sessions (percent)

%	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
Aware of	39.5	44.9	42.2	32.7
Have made use of	10.7	11.0	11.0	10.2
Not aware of	49.7	44.1	46.8	57.1

Workshops and Seminars

The City of Whitehorse conducted seven workshops, 15 seminars, and 20 mentoring sessions in 2017. In 2019, the number of workshops was reduced to five, the number of seminars remained similar, and the number of mentoring sessions more than doubled to 43. Differences in awareness and participation levels across survey periods may be explained partially by differences in the number of workshops and seminars offered and the promotional activities surrounding these programs.

Similar to the other services offered by the *Whitehorse City Council*, the awareness and use of *Workshops and Seminars* declined over the survey periods. Although 52% of businesses were aware of the *Workshops and Seminars* in 2014, this decreased to 40% in 2019 (12 percentage points; 20% decrease). The decline in awareness was accompanied by a fairly consistent level of use of the *Workshops and Seminars* over the three surveys. These were 20% in 2014 and 2017 and 18% in 2019. Similar to other services, the level of unawareness increased, in this instance dramatically from 27% to 43%.

Table 46: Awareness and use of the Workshops and Seminars (percent)

%	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
Aware of	46.0	52.4	45.9	39.7
Have made use of	19.3	20.3	19.8	17.8
Not aware of	34.8	27.3	34.2	42.5

Whitehorse Tertiary Business Skills Program

The level of awareness of the *Whitehorse Tertiary Business Skills Program* increased slightly from 17% in 2014 and 2017 to 21% in 2019. This occurred at the same time that use of the program increased from a small base (1.5% in 2014) to 7% of businesses. The levels of unawareness also declined from 82% and 83% in 2014 and 2017 respectively, to 73% of respondents who were unaware of the program in 2019.

Table 47: Awareness and use of the Whitehorse Tertiary Business Skills Program (percent)

%	All	2014	2017	2019
All	100.0	100.0	100.0	100.0
Aware of	18.3	17.0	16.8	20.5
Have made use of	3.1	1.5	0.0	6.8
Not aware of	78.6	81.5	83.2	72.6