
Australian Hotels Association

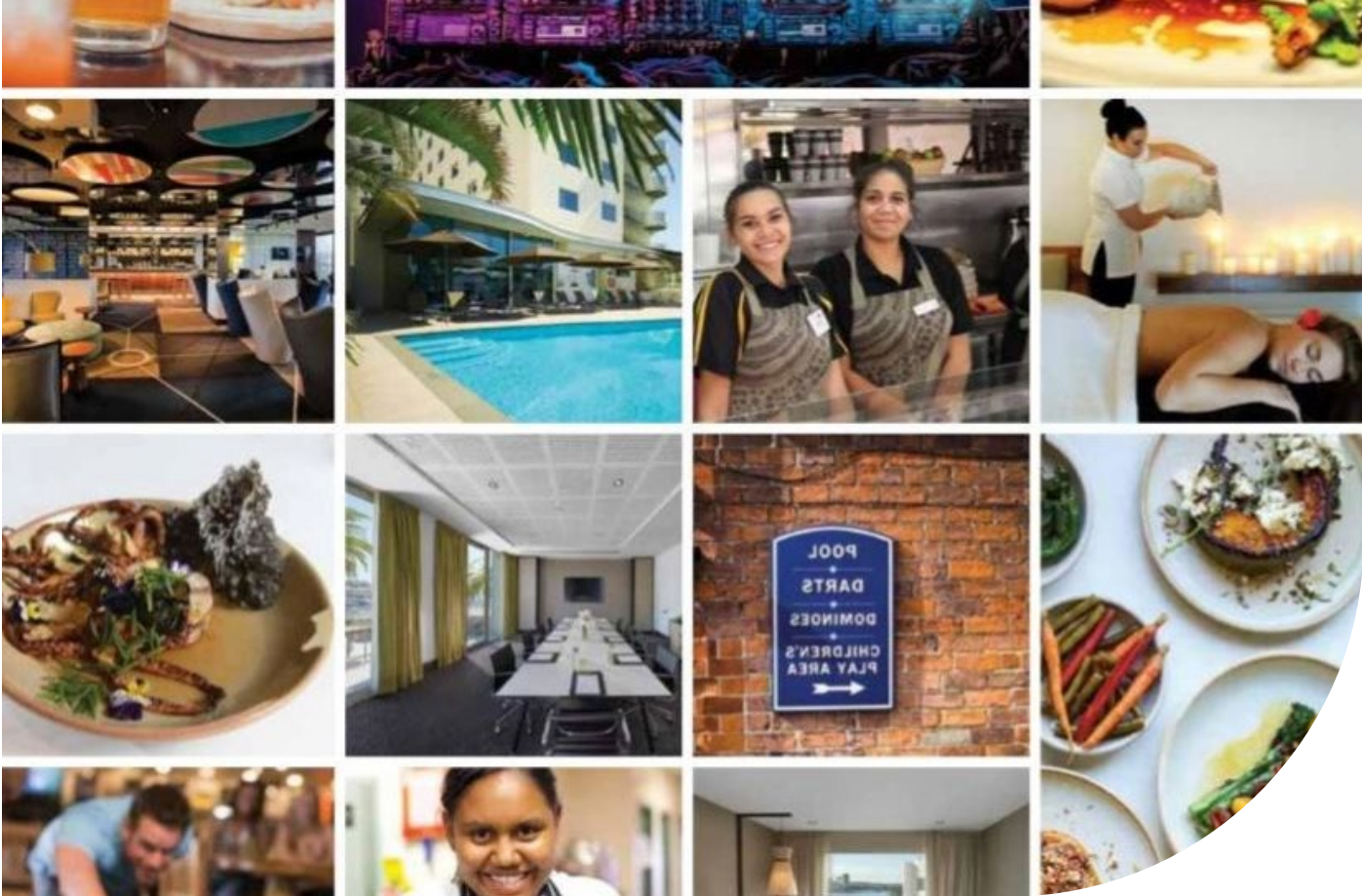
2018 Member Survey – results and findings



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Introduction

About Australian Hotels Association

The Australian Hotels Association (AHA) represents more than 5,000 members across Australia who are serviced by a network of AHA branches based in every state and territory, plus a national office in Canberra.

Australian hotels impact the economy and society in multiple ways, ranging from supporting employment and community groups, creating spaces for people to connect and celebrate, as well as providing venues for recreation, leisure and accommodation.

About the survey

PricewaterhouseCoopers Consulting (Australia) Pty Limited (PwC) was engaged by AHA to undertake a survey of their members for the purpose of understanding aspects of their activities over the 2016-17 financial year.

There were **699 respondents** to the survey, representing approximately 20% of AHA member venues.

This report has been prepared by AHA based on the survey responses collected.

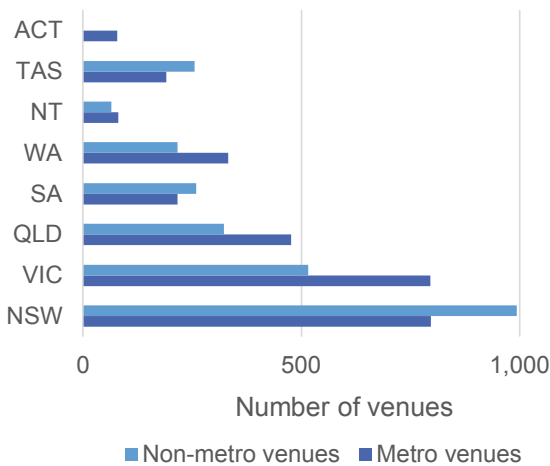
Where appropriate, results have been extrapolated across the AHA's entire member population to estimate the complete footprint of their 5,000+ members. A limitation of this approach is that the respondents, while making up a sufficient proportion of AHA's total members, may not be representative of the entire member base in terms size, business type, location etc.

Refer to **Appendix A** for the number of respondents for each survey question the reported results and findings are based on.

1 AHA member profile

AHA has 5,100 members located in all Australian states and territories.

Figure 1: AHA member venues, 2016-17



Source: Australian Hotels Association

There were **699 respondents** to the survey, responding on behalf of 1,047 member venues; approximately 20% of all AHA member venues. The majority of members are family-owned businesses.

Figure 2: Survey respondent locations, 2016-17

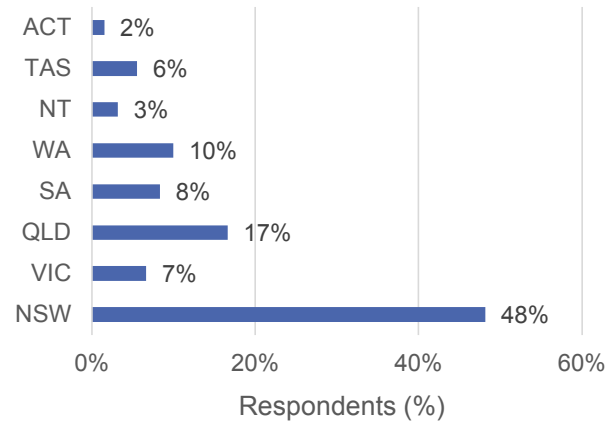
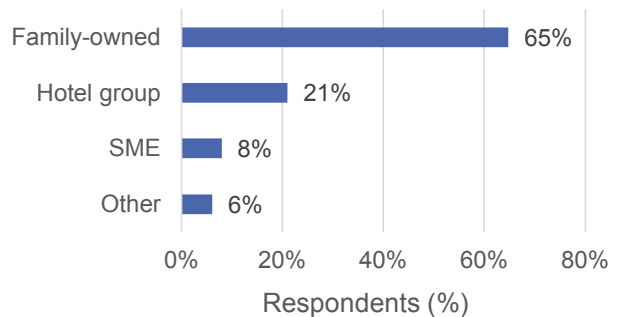
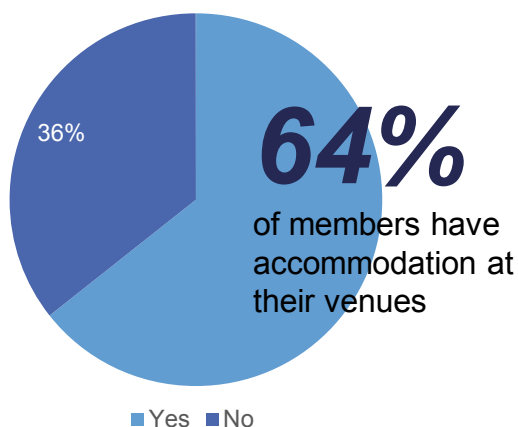


Figure 3: Business types of survey respondents, 2016-17



2 Accommodation

The majority of members have accommodation at their venues.



It is estimated that AHA member venues provide around

138,000
accommodation rooms
Australia-wide.



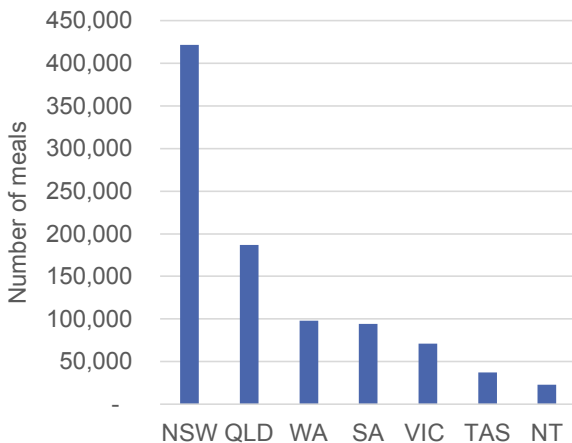
The average annual reported occupancy rate across all members was **59%**.

3 Food and beverage

Approximately **97%** of respondents serve meals at their venues.

It is estimated that around **4.1 million meals** are served by all AHA member venues per week.

Figure 4: Total number of meals served in one week by state, 2016-17



It is estimated that across all AHA member venues, around

4.1 million
meals are served per week nationwide.



4 Entertainment

Approximately **74%** of respondents provide entertainment at their venues, between **2 and 3 times per week** on average.

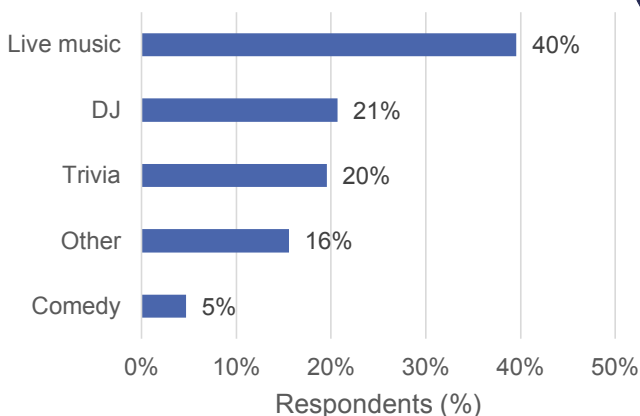
It is estimated that there are around:

9,750

entertainment events and/or activities provided each week across all AHA member venues

Live music is the most common type of entertainment, followed by DJ performance.

Figure 5: Types of entertainment provided at member venues, 2016-17



It is estimated that of these, **6,330 are live entertainment performances** (either live music, DJ performances or comedy).

5 Employees

It is estimated that all AHA member venues employed around

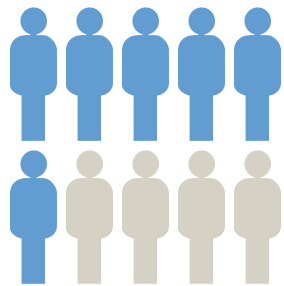


215,000

people at the end of June 2017.

Survey respondents reported employing an average of 47 employees per venue at the end of June 2017, holding roughly 21 full-time-equivalent (FTE) positions.

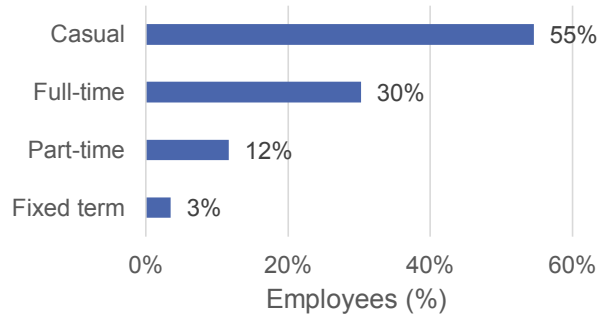
60%



of employees are female.

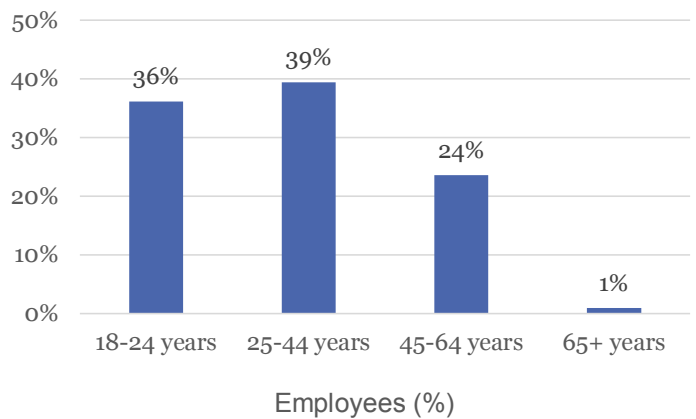
The majority of respondent employees held casual positions.

Figure 6: Categories off employment, 2016-17



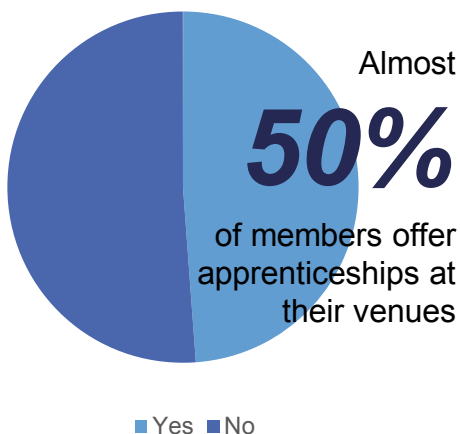
The largest employee age category is the 25-44 year old group.

Figure 7: Employee age groups, 2016-17



6 Apprenticeships

One in two survey respondents offer apprenticeships.



Of those who offered apprenticeships, approximately two positions were supported per member in 2016-17. It is estimated that across all AHA members, around **5,700 apprenticeship** positions were provided in the 2017 financial year.

7 Community contributions

The majority of respondents made some form of community contribution in the financial year ending 30 June 2017.

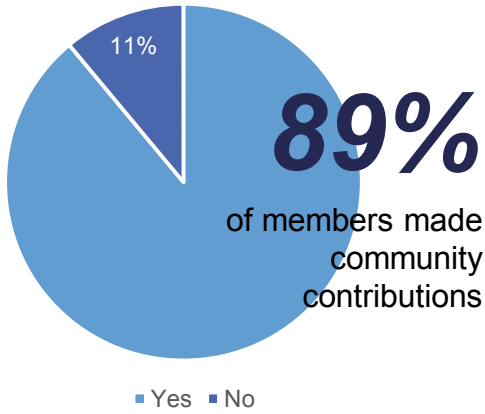
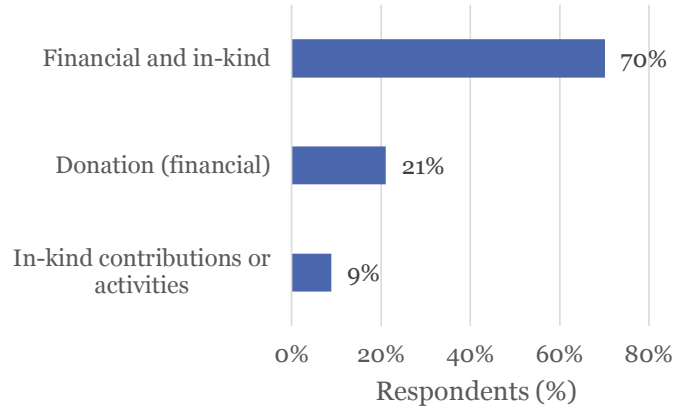
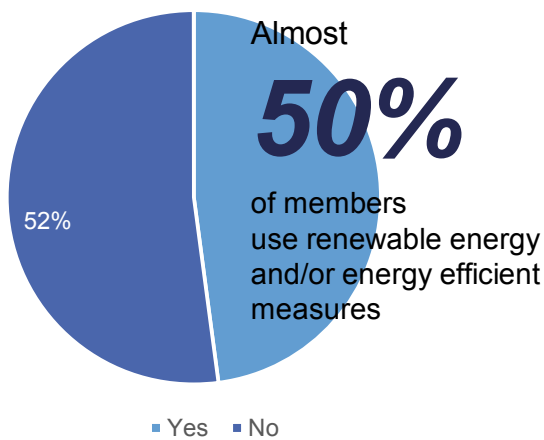


Figure 8: Types of community contributions made by respondents, 2016-17



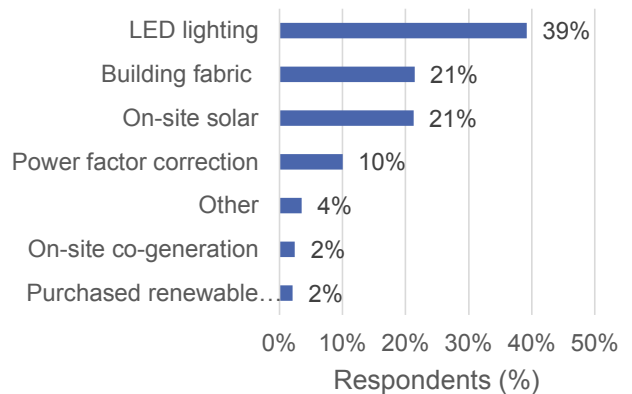
8 Sustainability

Almost half of respondents said they employ measures aimed at sustainable use of energy.



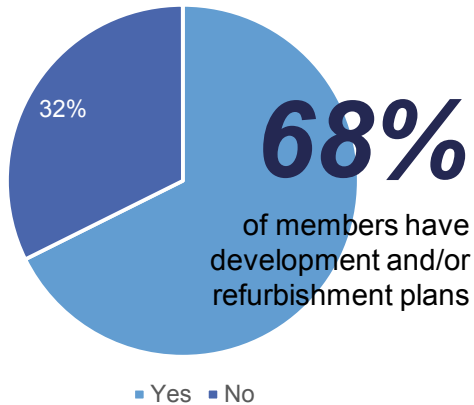
The most common type of measure employed is LED lighting, followed by on-site solar and building fabrication.

Figure 9: Forms of renewable energy or other efficiency measures implemented by respondents, 2016-17



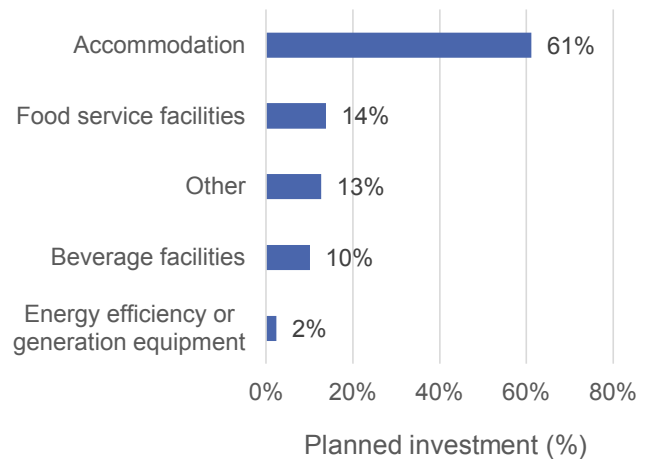
9 Member outlook

Approximately **68%** of members indicated they had plans for development and/or refurbishment of their venue(s) **over the next three years**.



When asked to indicate the amount of planned investment into development and refurbishment **over the next five years**, the highest area of investment was accommodation (61%), followed by food service facilities (14%).

Figure 10: Planned investment into development and refurbishment (next five years)



Appendices

Page no.

Appendix A Survey questions and number of respondents

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Appendix A Survey questions and number of respondents

Section	Survey question	Respondents (no.)
General information	How many venues will be included in your responses to this survey?	672
	What states are your venues located in?	696
	Are your venues in metropolitan or regional area?	698
	Please select the business type that best applies to your venues.	699
	If other, please specify.	37
Accommodation	Do you have accommodation at your venues?	690
	How many accommodation rooms are available in your venues?	422
	What has been your venue's average occupancy rate (%) in the last financial year?	397
Food and beverage	On average, how many meals are served at your venues in one week?	615
Entertainment	Please select the types of entertainment provided at your venues.	633
	If other, please specify.	70
	On average, how often is entertainment provided at your venues per week?	437
Employment	What was the headcount of employees at your venues as at 30 June 2017?	556
	How many full-time equivalents (FTEs) were employed by your venues as at 30 June 2017?	531
	Please specify your venues' total number of employees as at the end of the last financial year, under the following categories.	546
	Please specify how many family members (of the owner and/or licensee) were employed at your venues.	535
	How many of the following visas were sponsored by your venues in the last financial?	270
	Please indicate the number of employees in each age group. Where ages are not known, please provide an approximate split across age groups.	515
	What is the gender split of employees at your venues, by number of employees?	521
Apprenticeship training	Do your venues offer apprenticeship training?	555
	If yes, how many apprenticeship positions were provided in the last financial year.	252
Community contributions	Did your venue make contributions to community groups in the last financial year?	552
	Please indicate the type of community contributions made by your venue in the last financial year.	486
	Please indicate the number of organisations which your venue supported in the last financial year.	458
Sustainability	Do your venue use any form of renewable energy or implement any other energy efficiency measures?	459
	If yes, please select all that apply.	262
	If other, please specify.	19
Outlook	Do your venues have plans for development or refurbishment of venue buildings and facilities over the next 3	546
	Please indicate estimated cost (\$AUD) of planned development or refurbishment of venue buildings and facilities over the next 5 years, broken down by the following categories.	316
	If other, please specify	63
Financial information	"Please complete the financial information for the following items for the financial year ended 30 June 2017 (\$AUD).	296
