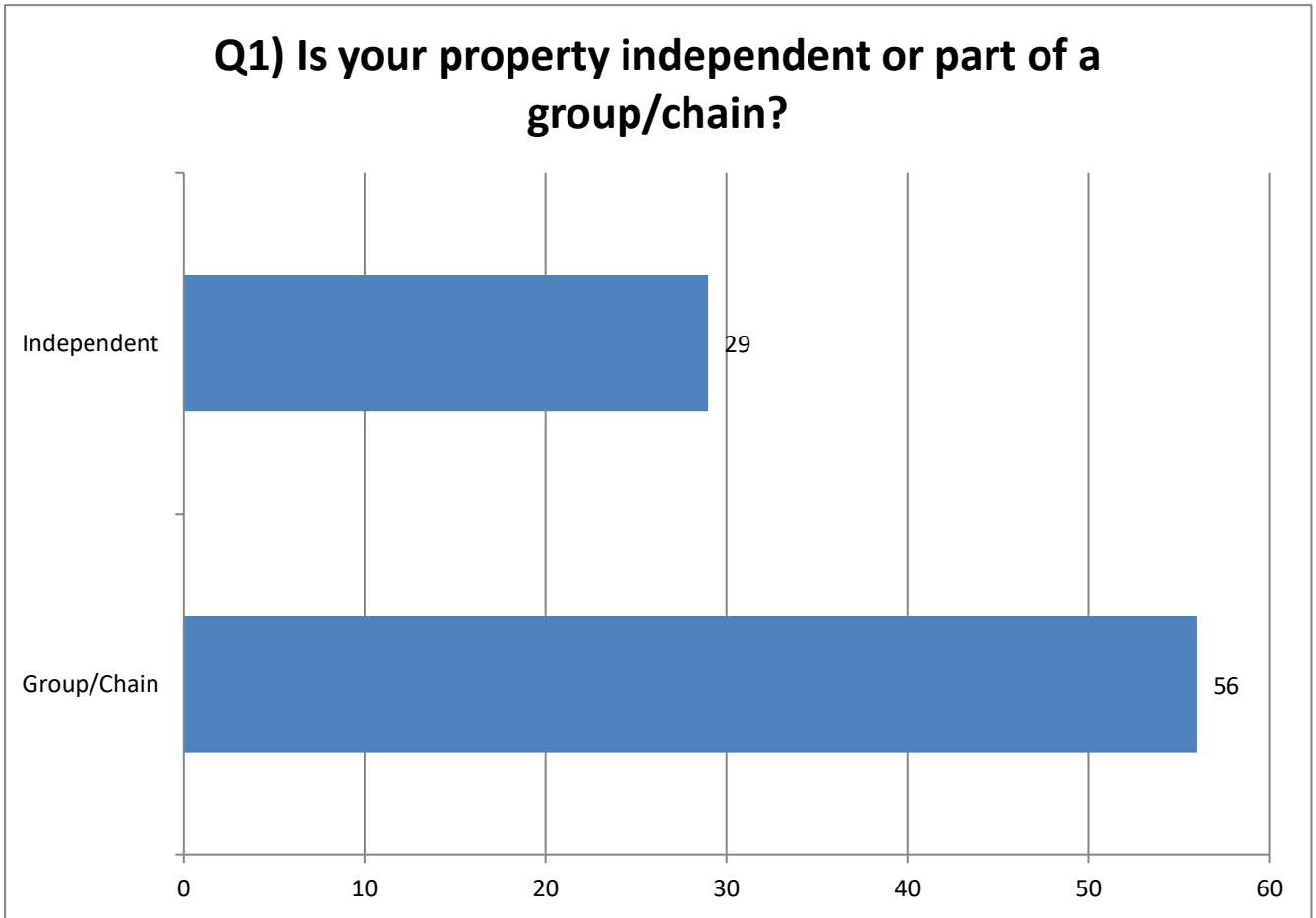
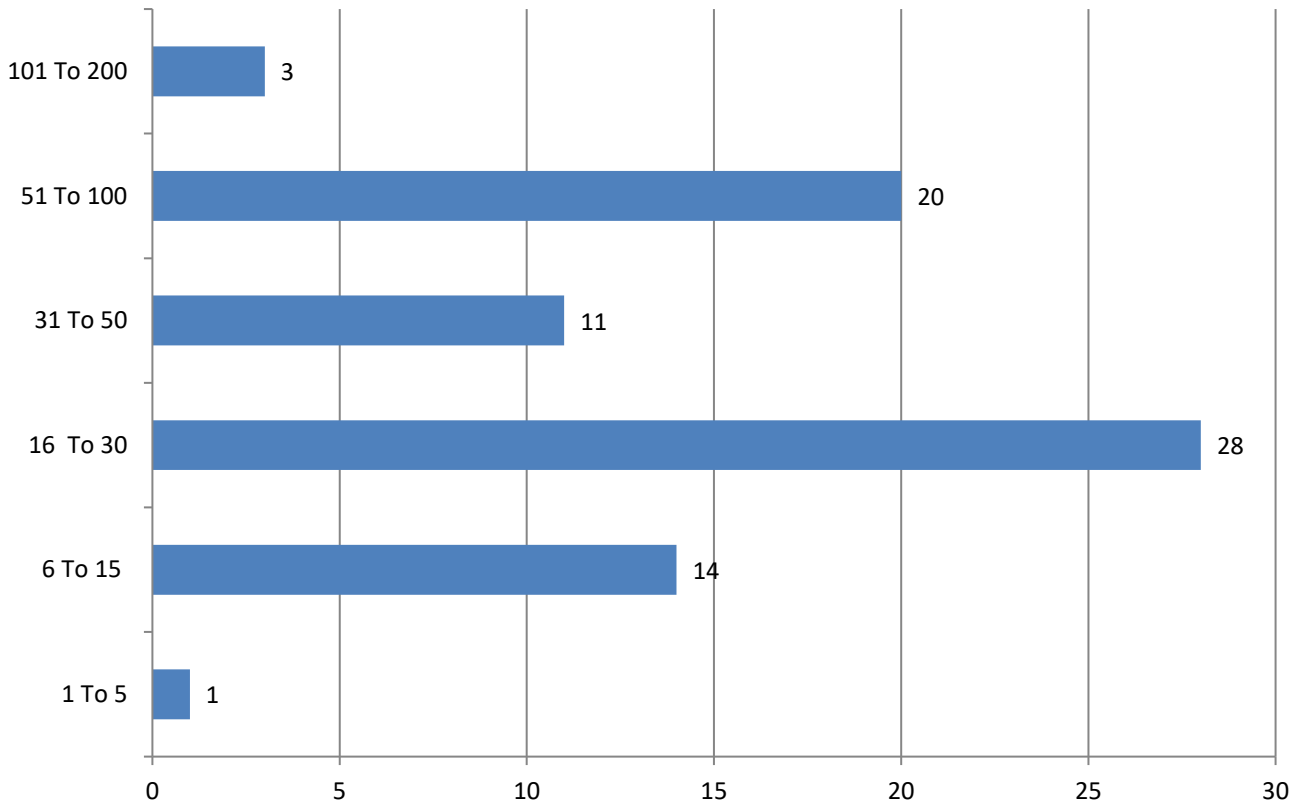


## Survey Results 2018 – Victoria



Answer Choices	Responses	Percentage
Independent	29	65.88%
Part of a Group or Chain	56	34.11%
Total	85	

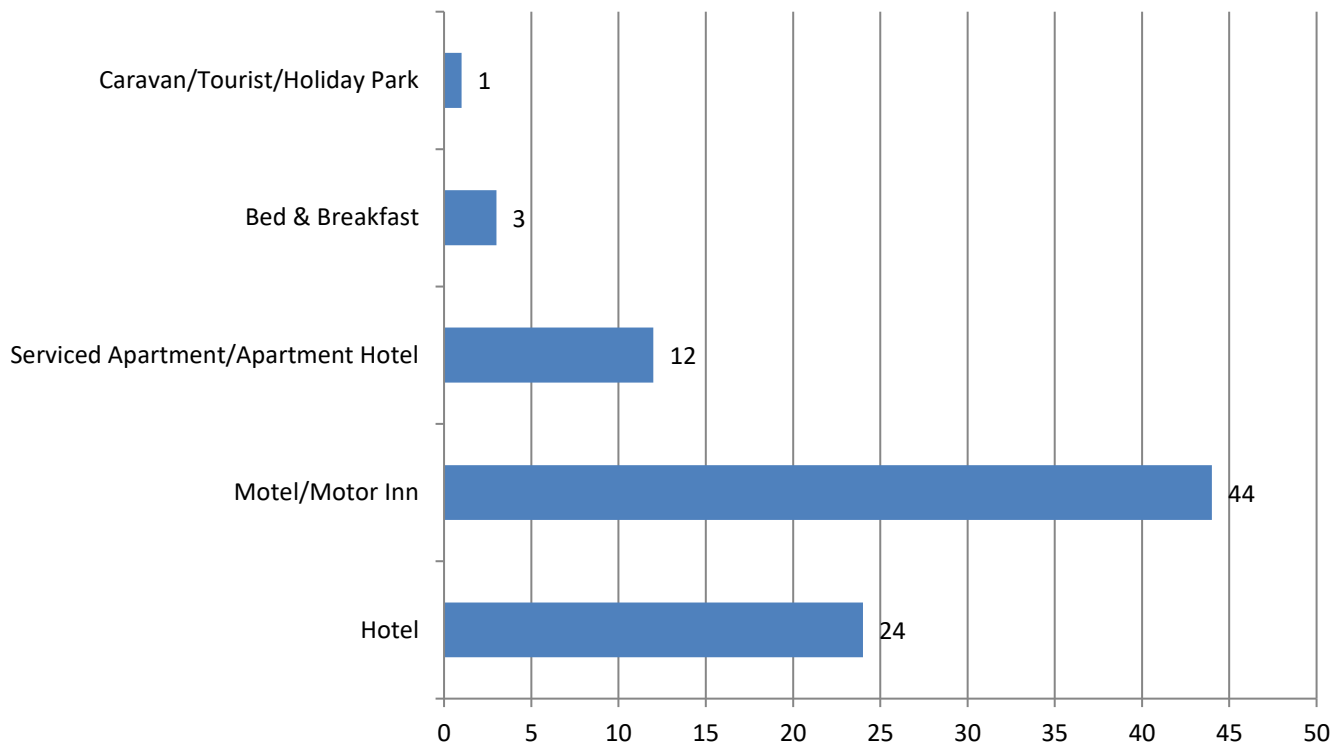
## Q2) How many rooms does your property operate?



Answer Choices	Responses	Percentage
1 – 5 Rooms	1	1.29%
6 – 15 Rooms	14	18.18%
16 – 30 Rooms	28	36.36%
31 – 50 Rooms	11	14.28%
51 – 100 Rooms	20	25.97%
101 – 200 Rooms	3	3.86%
Total	77	

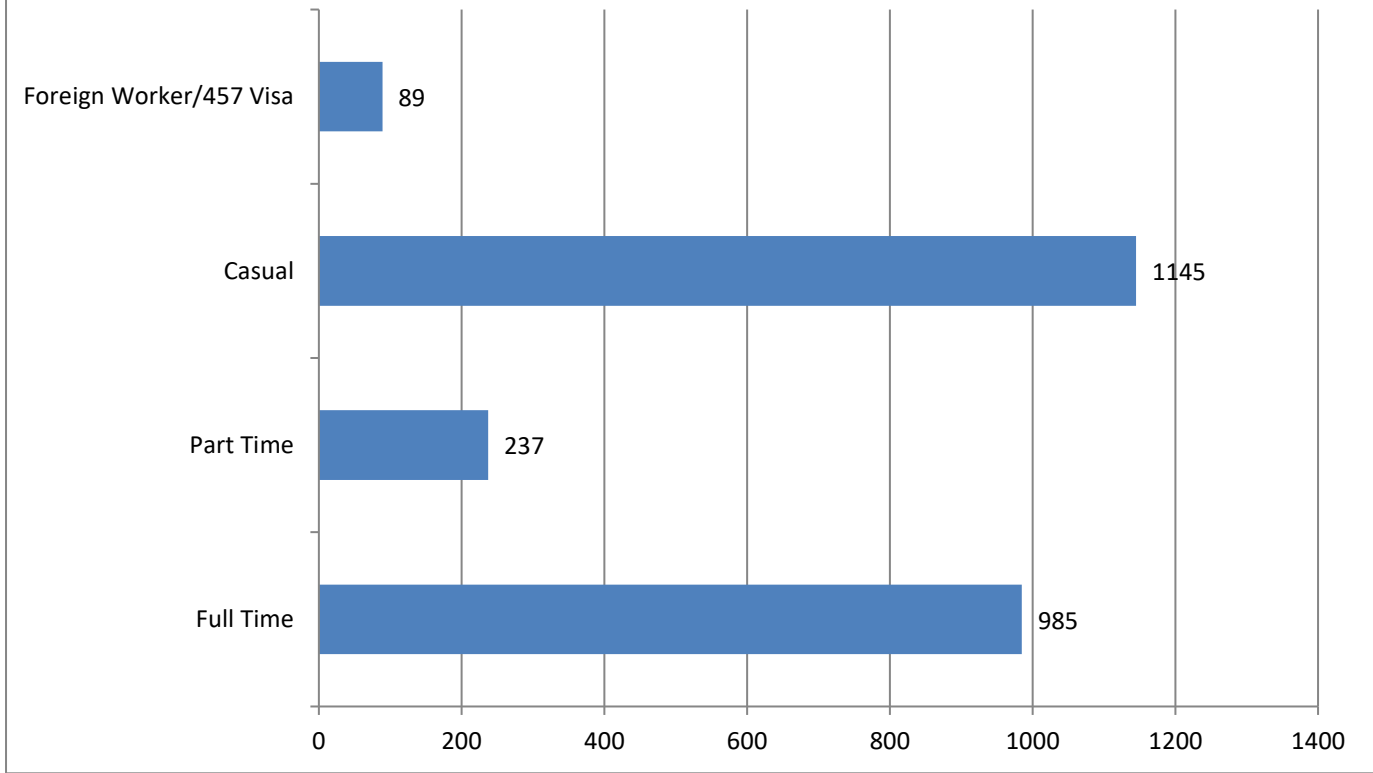


### Q3) Please indicate what sector your property operates in.



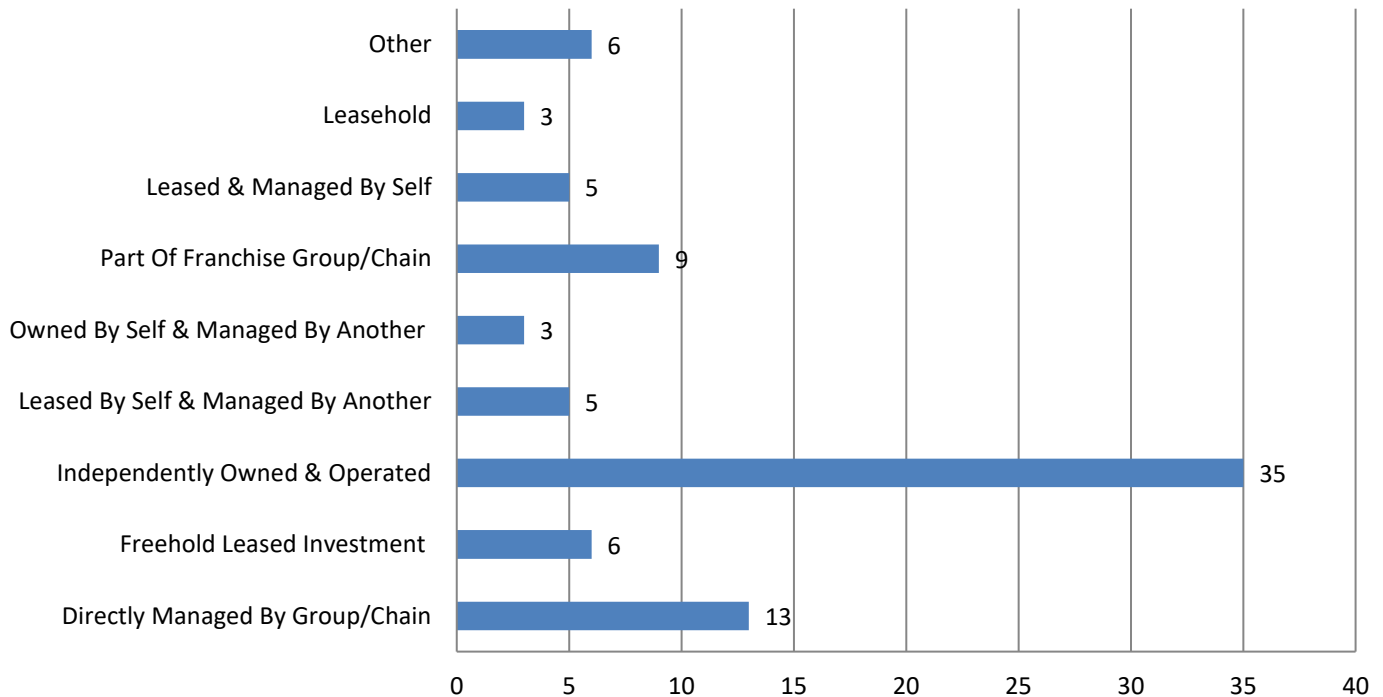
Answer Choices	Responses	Percentage
Hotel	24	28.57%
Motel/Motor Inn	44	52.38%
Serviced Apartment/Apartment Hotel	12	14.28%
Bed & Breakfast	3	3.57%
Caravan/Tourist/Holiday Park	1	1.19%
Total	84	

### Q4) How many staff do you currently employ and on what basis?



Answer Choices	Responses	Percentage
Full Time	985	40.1%
Part Time	237	9.64%
Casual	1145	46%
Foreign Worker/457 Visa	89	3.62%
Total	2456	

### Q 5) Indicate which of the following best describes the business operating structure as relevant to you:



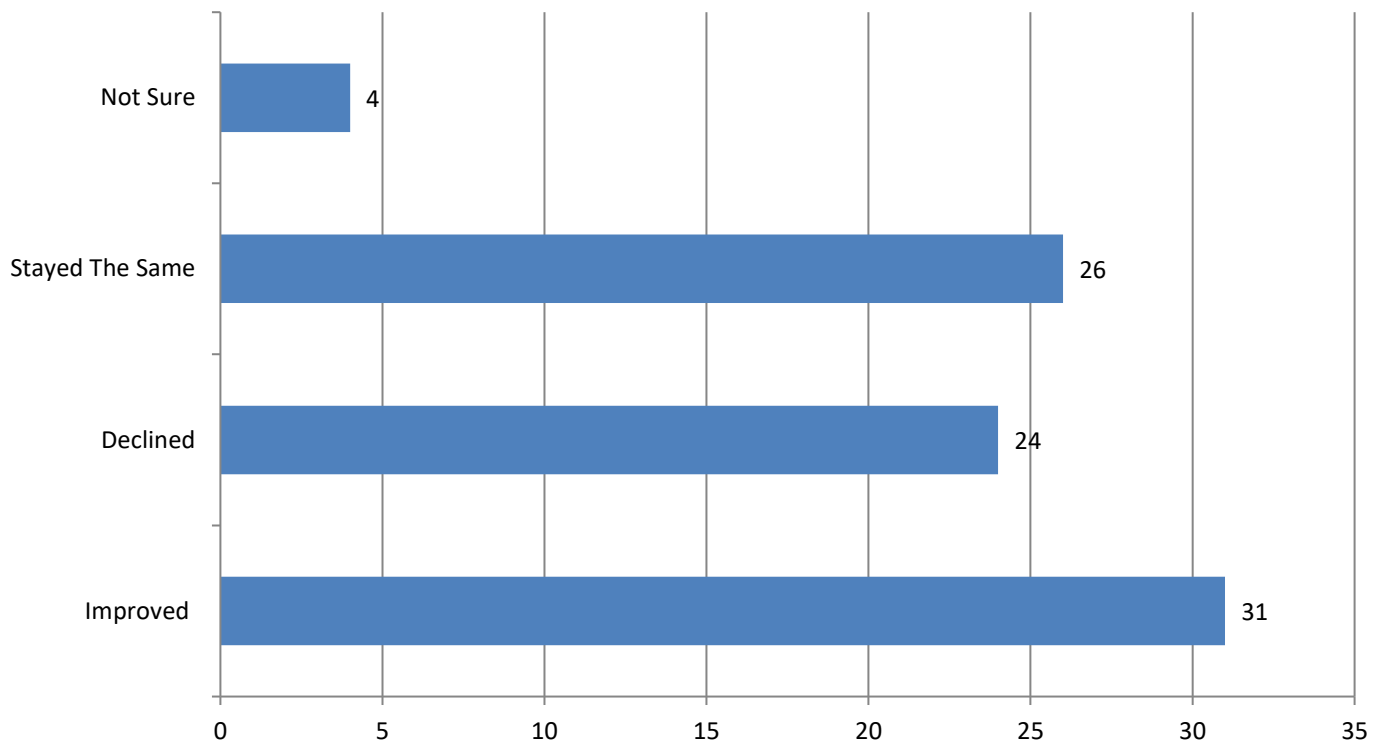
#### Other comments:

Other Comments	Responses
Leased by Another Managed By Self	2
Owned By Other Managed By Self	1
Strata Owned Leased by Chain	1
Owned By The Australian Navy Canteens	1
Leased/Freehold owned by other	1

Answer Choices	Responses	Percentage
Directly Managed By Group/Chain	13	15.29%
Freehold Leased Investment	6	7.05%
Independently Owned & Operated	35	41.17%
Leased By Self & Managed By Another	5	5.88%
Owned By Self & Managed By Another	3	3.52%
Part of Franchise Group/Chain	9	10.58%
Leased & Managed By Self	5	5.88%
Leasehold	3	3.52%
Other (please specify)	6	7.05%
Total	85	

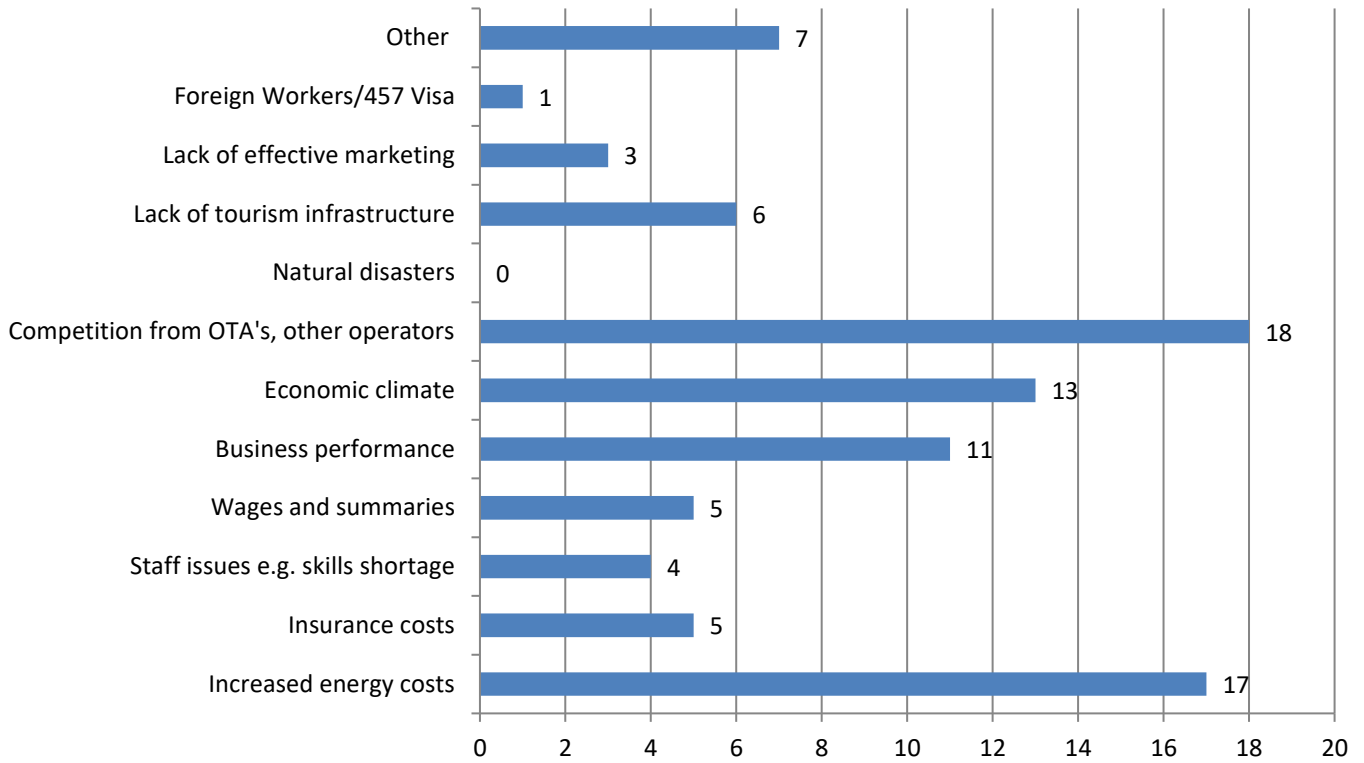
Q6) Asked for the properties postcode.

**Q7) In the past financial year 2016/2017, how would you best describe the economic performance of your property?**



Answer Choices	Responses	Percentage
Improved	31	36.47%
Declined	24	28.23%
Stayed the same	26	30.58%
Not Sure	4	4.7%
Total	85	

**Q8) Please identify what factors have contributed most to this decline:**



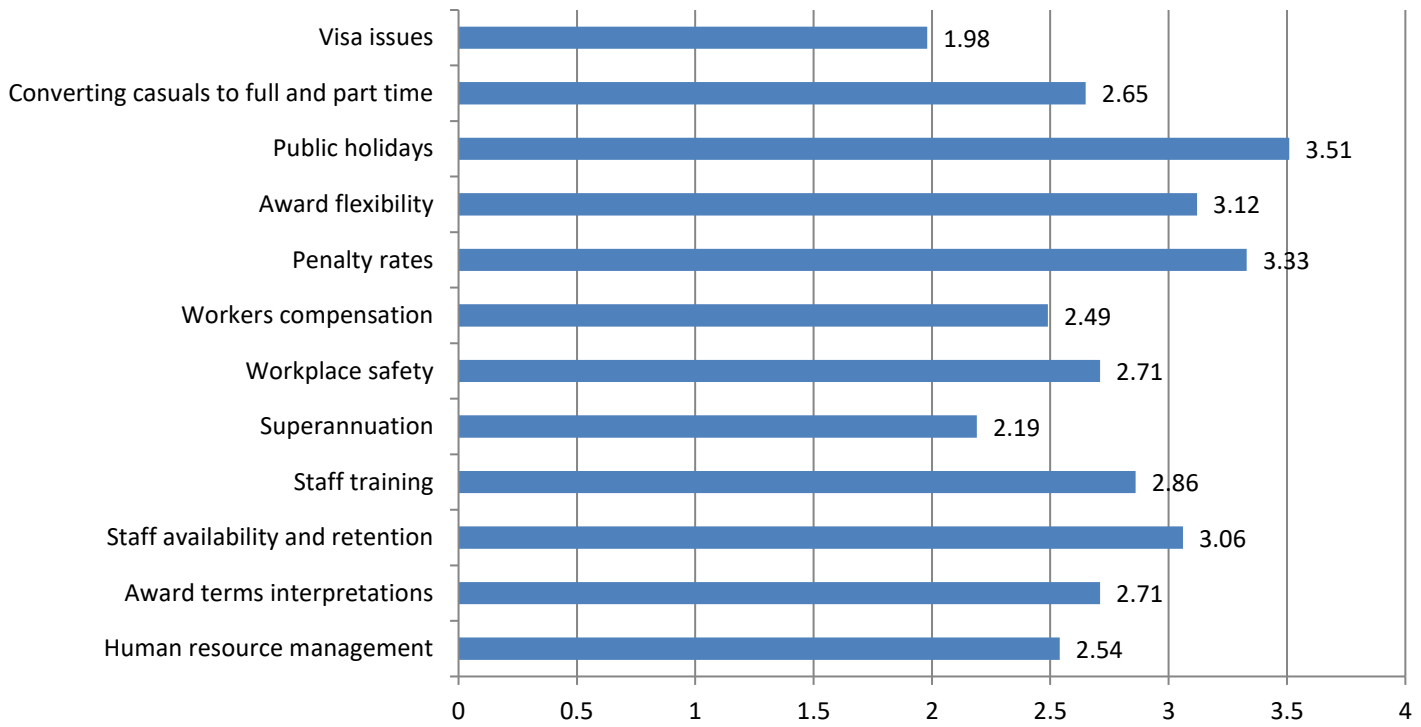
**Other:**

Other Comments:	Responses
Air B&B	2
Lack of representatives	2
Lack of events and MCEC events	1
Land Tax	1
Internet Price Matching	1

Answer Choices	Responses	Percentage
Increased Energy Costs	17	18.88%
Insurance Costs	5	5.55%
Staff issues e.g. skills shortage	4	4.44%
Wages & Summaries	5	5.55%
Business Performance	11	12.22%
Economic Climate	13	14.44%
Competition from OTA's & Other Operators	18	20%
Natural Disasters	0	0%
Lack of Tourism Infrastructure	6	6.66%
Lack of Effective Marketing	3	3.33%
Foreign Workers/ 457 Visa	1	1.11%
Other	7	7.77%
Total	90	

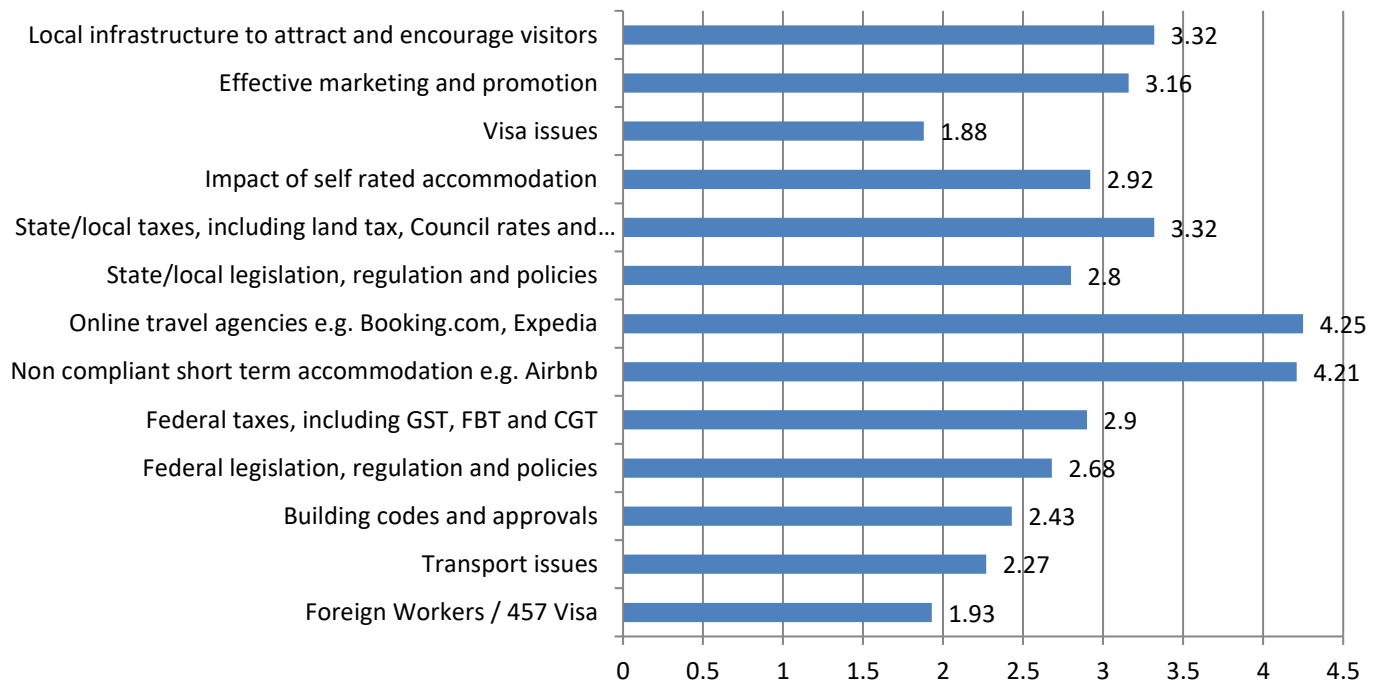


**Q9) Please rate the following areas of concern, with 1 being of least concern and 5 being of most concern.**



	1	2	3	4	5	Total	Weighted Average Score:
Human resource management	24	19	22	7	11	83	2.54
Award terms interpretations	20	13	32	9	9	83	2.71
Staff availability and retention	15	20	15	11	22	83	3.06
Staff training	22	24	15	14	8	83	2.86
Superannuation	32	24	11	11	5	83	2.19
Workplace safety	22	17	20	11	13	83	2.71
Workers compensation	26	20	15	14	8	83	2.49
Penalty rates	12	14	17	14	26	83	3.33
Award flexibility	17	12	15	22	17	83	3.12
Public holidays	12	12	12	15	32	83	3.51
Converting casuals to full and part time	31	7	21	8	16	83	2.65
Visa issues	51	3	15	7	7	83	1.98

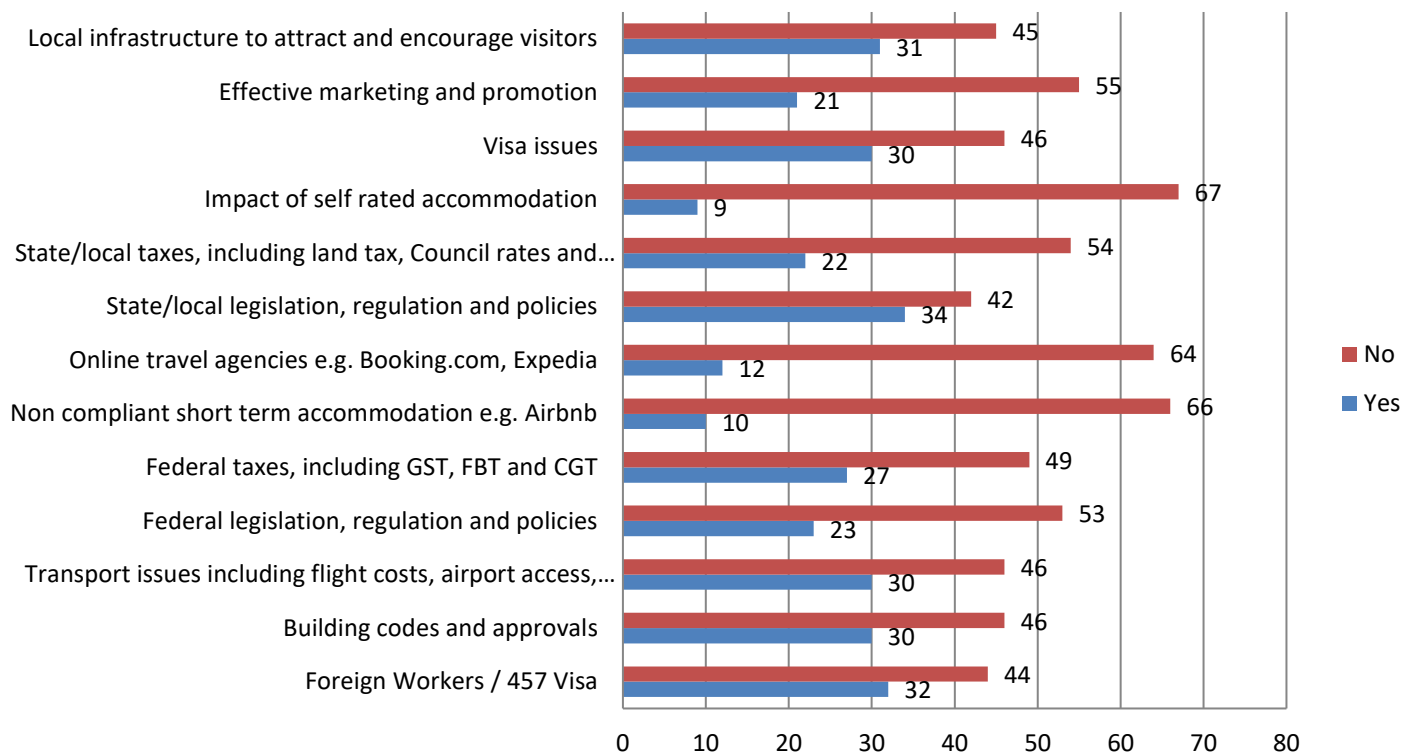
**Q10) Please rate the following issues of concern to the business over the last 12 months, with 1 being of least concern and 5 being of most concern.**



	1	2	3	4	5	Total	Weighted Average Score:
Foreign Workers / 457 Visa	47	11	10	4	8	80	1.93
Transport issues	30	20	14	10	6	80	2.27
Building codes and approvals	24	15	27	10	4	80	2.43
Federal legislation, regulation and policies	18	20	22	9	11	80	2.68
Federal taxes, including GST, FBT and CGT	19	10	21	20	10	80	2.9
Non-compliant short term accommodation e.g. Airbnb	5	3	9	16	47	80	4.21
Online travel agencies e.g. Booking.com, Expedia	3	5	8	17	47	80	4.25
State/local legislation, regulation and policies	10	21	30	13	6	80	2.8
State/local taxes, including land tax, Council rates and payroll tax	12	7	21	23	17	80	3.32
Impact of self-rated accommodation	23	10	20	9	18	80	2.92
Visa issues	47	11	11	6	5	80	1.88
Effective marketing and promotion	10	8	36	11	15	80	3.16
Local infrastructure to attract and encourage visitors	12	8	23	12	25	80	3.32

**Additional Comments:** OTAs not only have the market share but also web searches and the higher costs are advertised not the motels direct /drive in rate.

**Q11) In your opinion, does the Government support the accommodation industry in the following areas?**



	Yes	No	Total
Foreign Workers / 457 Visa	32	44	76
Building codes and approvals	30	46	76
Transport issues including flight costs, airport access, public transport options	30	46	76
Federal legislation, regulation and policies	23	53	76
Federal taxes, including GST, FBT and CGT	27	49	76
Non-compliant short term accommodation e.g. Airbnb	10	66	76
Online travel agencies e.g. Booking.com, Expedia	12	64	76
State/local legislation, regulation and policies	34	42	76
State/local taxes, including land tax, Council rates and payroll tax	22	54	76
Impact of self-rated accommodation	9	67	76
Visa issues	30	46	76
Effective marketing and promotion	21	55	76
Local infrastructure to attract and encourage visitors	31	45	76

**Additional Comments:**

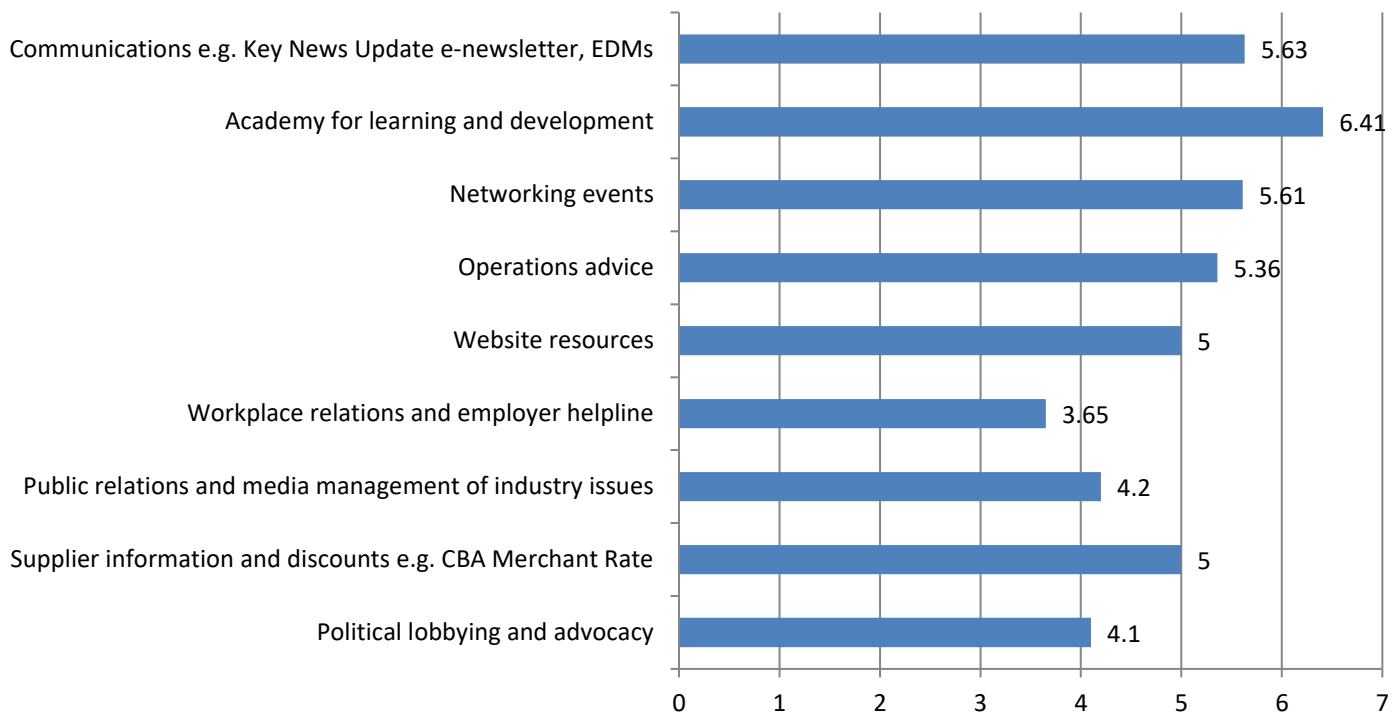
- Government does not spend enough helping small accommodation owners/local tourism and are disconnected except for cycling in north East Victoria. We have 3-5 accommodation businesses in our small town up for sale - not enough promotion from state tourism other

than cycling and I think answering 'Yes or No' to these questions is difficult. Some of the answers are more complex than yes or no.

- The Australian Competition and Consumer Commission allows price fixing and we need a fight campaign driven by you with education for customers about Booking direct!

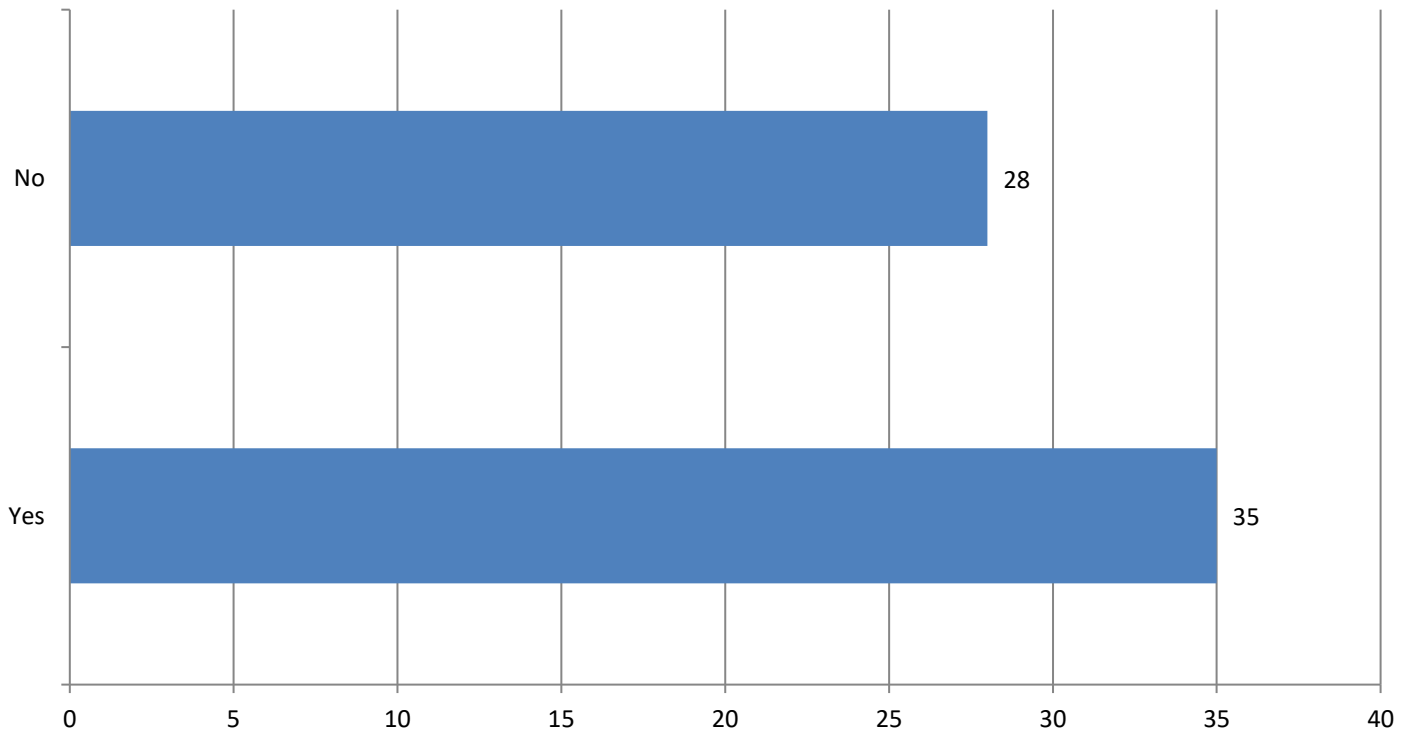


**Q12) Please rank the following AAoA member benefits in order of greatest value to your business.**



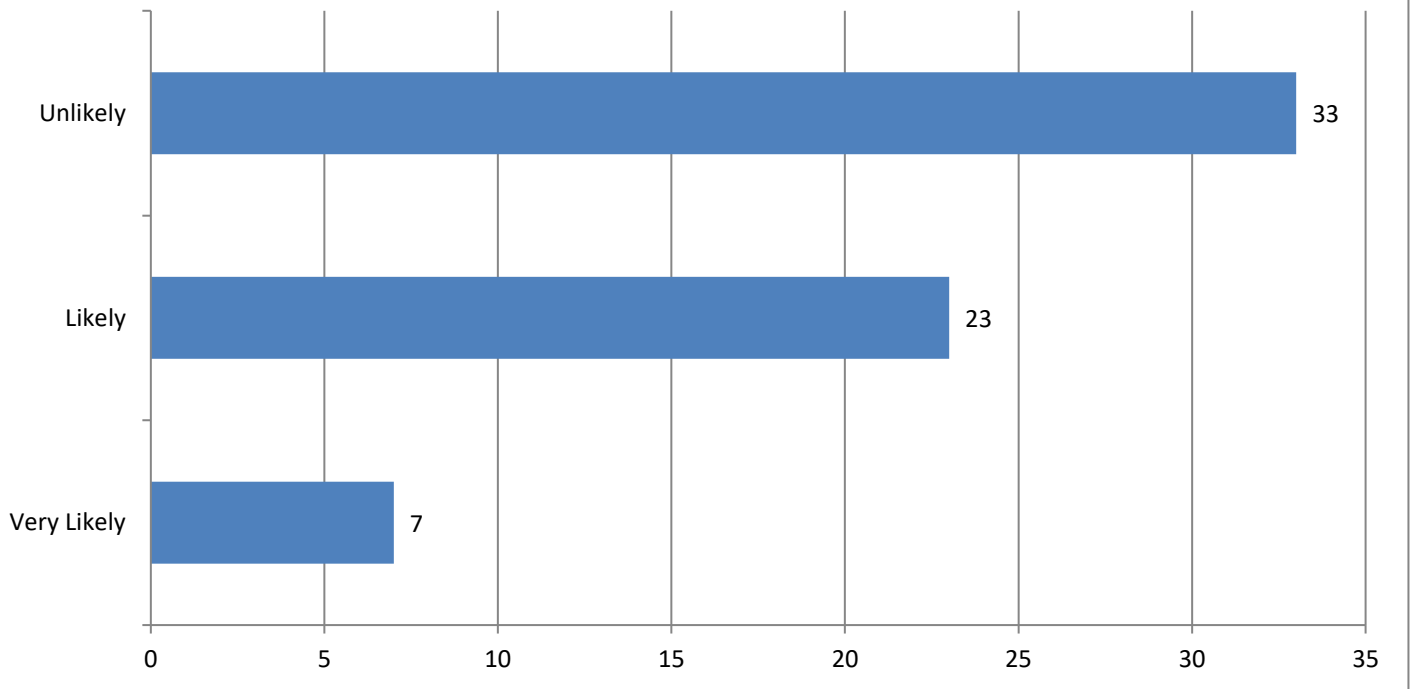
	1	2	3	4	5	6	7	8	9	10	Weighted Average Score:
<b>Political lobbying and advocacy</b>	18	15	2	2	6	1	3	4	12	0	4.1
<b>Supplier information and discounts e.g. CBA Merchant Rate</b>	5	9	5	11	7	6	6	6	8	0	5
<b>Public relations and media management of industry issues</b>	6	10	13	10	7	5	3	7	2	0	4.2
<b>Workplace relations and employer helpline</b>	13	10	9	12	5	8	1	3	2	0	3.65
<b>Website resources</b>	5	4	12	4	8	9	11	7	3	0	5
<b>Operations advice</b>	3	3	8	6	10	15	8	5	5	0	5.36
<b>Networking events</b>	6	4	5	5	6	4	18	10	5	0	5.61
<b>Academy for learning and development</b>	2	2	4	6	5	10	6	17	11	0	6.41
<b>Communications e.g. Key News Update e-newsletter, EDMs</b>	5	6	5	7	9	5	7	4	15	0	5.63

### Q13) Do you have confidence in Vocational Education and Training through Registered Training Organisations?



Answer Choices:	Responses:
Yes	55.5%
No	44.4%
Total	63

### Q14) How likely are you to offer work placement / experience to assist job seekers gain employment in the industry in the next 12 months?



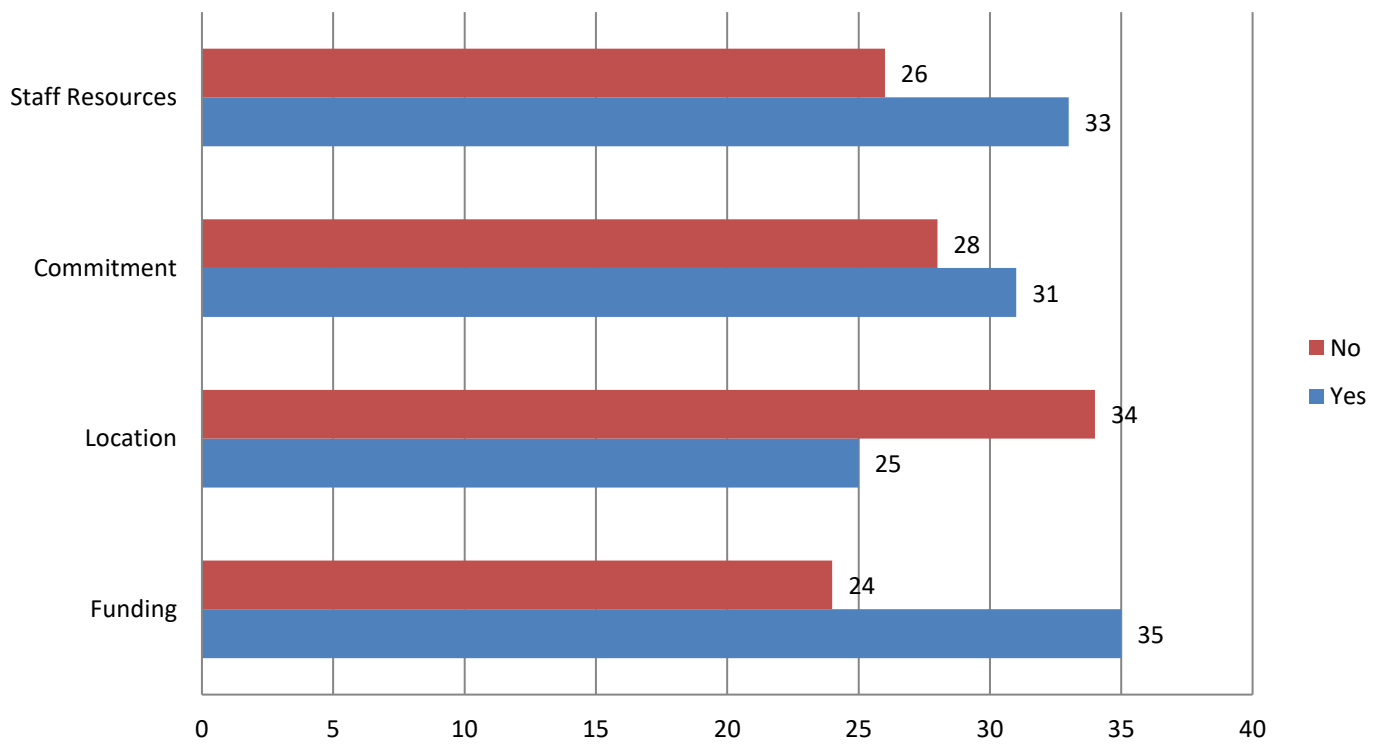
Answer Choices:	Responses	Percentage
Very Unlikely	7	11%
Likely	23	36.5%
Unlikely	33	52.3%

**Additional Comments:**

**Likely** - Dependant on RTO and trainer involved.

**Unlikley** - We rarely have requests for this, but would consider if we were approached. I have tried this several times but have found that young people want the training and the money but don't actually want to spend any time working and think housekeeping is beneath them; where I, as a business owner do it all the time. Employment will only occur if we lose staff wages. Rates are increasing faster than revenue and due to the uncertainty of accommodation bookings we would not allow for consistency in learning.

**Q15) Do any of the following prevent you from offering nationally recognised training and qualification for your staff?**



	Yes		No	
	Count	Percentage	Count	Percentage
Funding	35	59.3%	24	40.6%
Location	25	42.3%	34	57.6%
Commitment	31	52.5%	28	47.4%
Staff Resources	33	55.9%	26	44%

Total Answered: 59

**Additional Comments:**

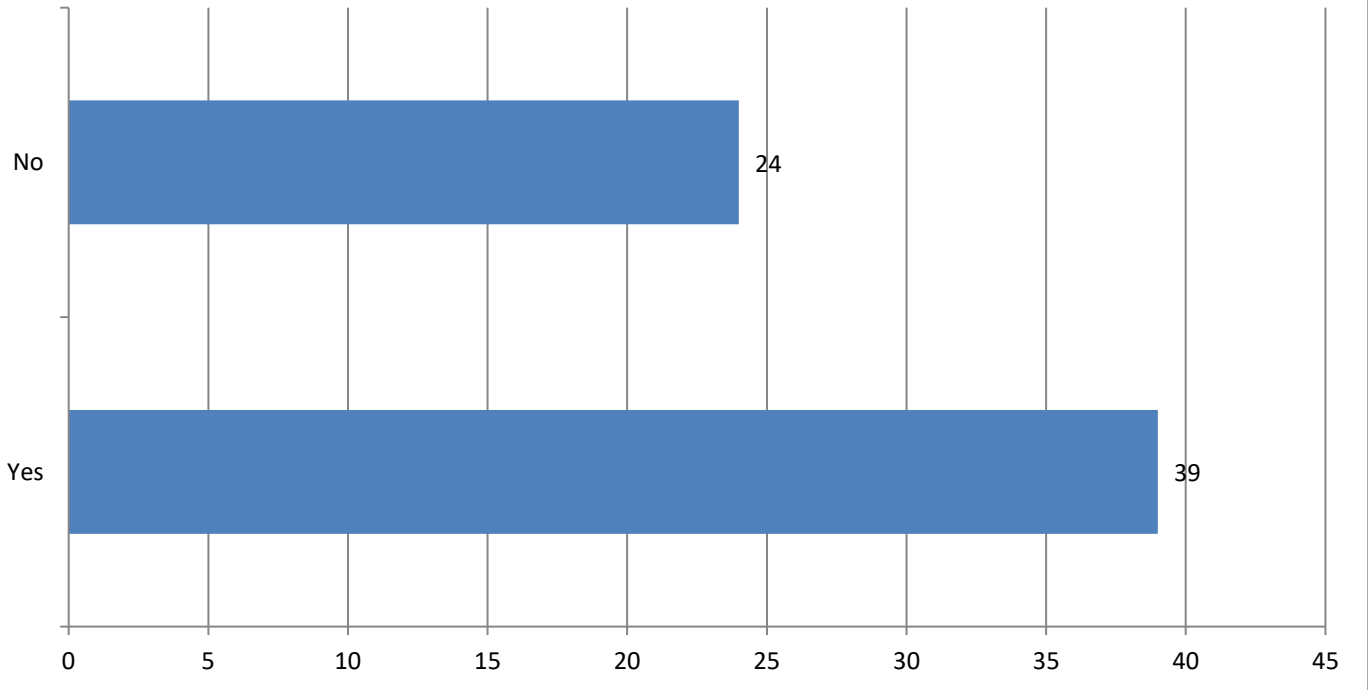
**Location** - We have previously participated in nationally recognised training but it was very expensive & a number of staff members dropped out of the training without completing and it still cost the business a lot of money. It's hard when businesses are penalised for transient and uncommitted staff.

**Staff Resources** - Minimum hour requirements prevent us because we cannot afford to offer the minimum hours required for eligibility in these schemes.

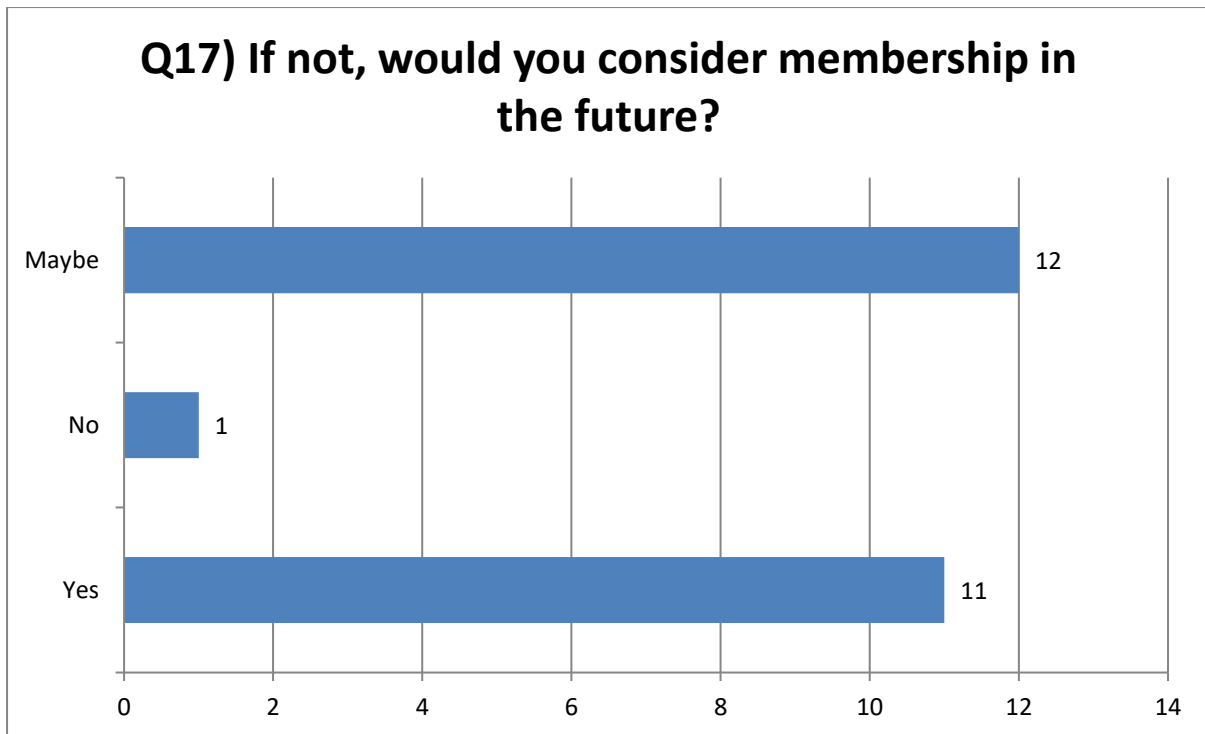




### Q16) Is your property currently a member of the AAOA?



Answer Choices:	Responses:
Yes	61.9%
No	38%
Total	63

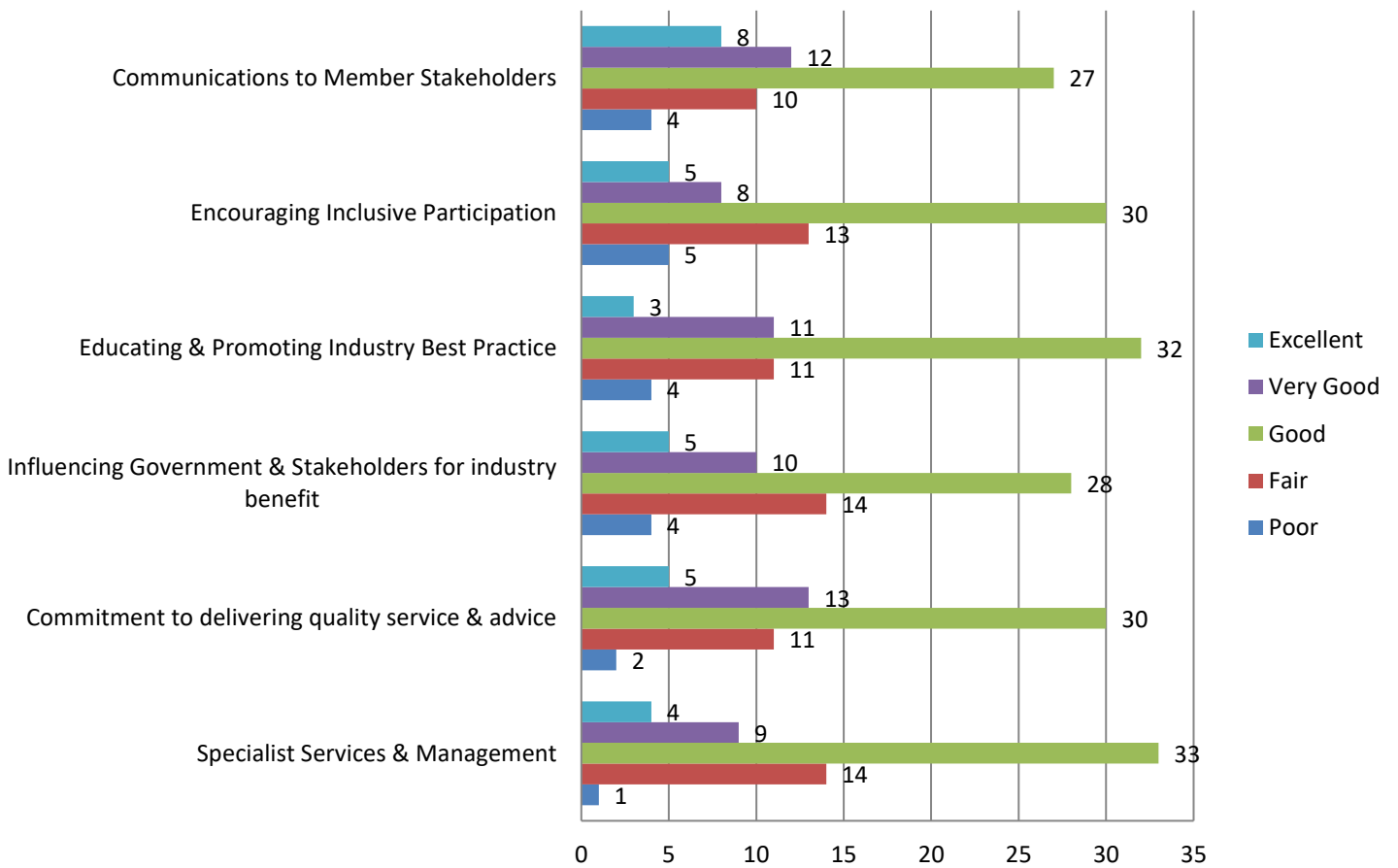


Answer Choices:	Responses:
Yes	45.8%
No	4%
Maybe	50%
Total	24

**Q18) What other services/benefits could we offer to make membership more attractive and worth the investment to you?**

- Funding Or incentive to participate
- More Networking Events
- We are VECCI members. It would need to offer at least similar benefits (ie value for money) as the VECCI membership, for around the same price (or less).
- Reduce cost of membership fees. It is the reason we are not members anymore
- Best practice training for small operators in motel space
- Local training workshops/briefings
- Create a National advertising campaign to book directly with the accommodation provider and not through a third party site

**Q19) Please rate the Association's performance in the following areas, 1 being poor with 5 being excellent**



	Poor	Fair	Good	Very Good	Excellent
Specialist Services & Management	1	14	33	9	4
Commitment to delivering quality service & advice	2	11	30	13	5
Influencing Government & Stakeholders for industry benefit	4	14	28	10	5
Educating & Promoting Industry Best Practice	4	11	32	11	3
Encouraging Inclusive Participation	5	13	30	8	5
Communications to Member Stakeholders	4	10	27	12	8