



# Hospitality insights

## What makes licensed hotels successful?

This report provides results of the inaugural hotelier and patron survey

August 2015



AHA (Vic) Premium Associate Partner



# Top three insights:

## /01 PATRONS

### CARE MOST about:

1. Staff and service quality
2. Dining experiences – especially the 35–54 age bracket
3. Security and safety

### VISIT HOTELS REPEATEDLY for their:

1. Food
2. Customer service
3. Atmosphere
4. Proximity to home

## /02

### WORD OF MOUTH

via traditional methods and new technology is critical for a hotel's success.

Online reviews, social media and apps all play an important part, yet hotels are not using these mediums effectively and must focus on the positive impact they can have on profitability.



## /03 GOOD NEWS



# 94.3%

of patrons expect to visit licensed hotels just **as much as they do now** if not more in 2017.

# Contents

For how the  
survey was  
conducted, visit  
page 25

These insights aim to enable hotel owners and managers to assess their current position and adapt for the future to ensure their venue plans align with consumer preferences and changing behaviours.

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# Executive summary

Hotels across Victoria are always looking for ways to improve their bottom line. The results of this research provide key insights to assist licensed hotel managers and owners in understanding key profit pressure points, changing customer expectations, challenges and opportunities for the hospitality industry.

Research is the first step in understanding patron motivations and expectations. By understanding what Victorian patrons want from their local licensed hotel, hoteliers are able to identify areas of improvement and invest their efforts accordingly.

Identifying the similarities and differences in hotelier and patron opinions helps venue owners shape their strategic direction to ensure they are making smarter business decisions which has a positive impact on their profitability.

In order to determine what makes licensed hotels successful, it was essential to assess patron motivations for attending a hotel, the importance of hotel facilities to patrons, common challenges facing hotel owners and managers, the common goals hotels are striving for and the effectiveness of popular marketing tools.

Patrons have been crystal clear when it comes to what they care most about – **friendly staff, exceptional service** and **great food**. In fact, the combination of these three components lead to repeat patronage which means one thing – loyalty.

Hoteliers need to understand the power and importance of positive customer experiences as these drive the all-important word of mouth recommendations via both traditional means and online methods such as Zomato (formerly UrbanSpoon).

The findings of this survey suggest that providing exceptional experiences and using new technology effectively to promote your hotel will positively impact a hotel's bottom line.

Hotels will be happy to hear that the outlook for the future is positive from a patronage perspective, so it is important for licensed hotel owners and managers to listen to the Victorian punter and work smarter, not longer.

## Tim Stillwell

Partner,  
**ShineWing Australia**

Director,  
**On Tap Hospitality**







# Patron insights

# Survey participants

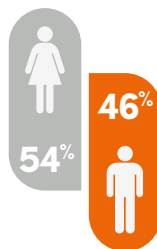
## Patrons

Survey participants had attended a regional Victorian or Melbourne suburban/CBD licensed hotel.



A representative sample of patrons was surveyed with:

- An average age of **49 years** and 43.6% aged 54+
- A balanced gender split of **54%** of female and **46%** male



Examining patrons' age, gender, employment, and income against hotel types shows:



**Tradespeople** spend the most time at **F&B** hotels



**Males** have a **35% higher attendance** at **F&B** hotels **than females**



**High income earners** attend far more F&B hotels **than gaming** hotels

## How much does the average patron spend on a typical visit to a licensed hotel?



**\$44\***

Food



**\$29\***

Beverages / alcohol



**\$37**

Gaming / wagering



**\$14**

Other entertainment

*\*may include spending on other people*

## Who spends the most and on what?

<b>High income earners \$100k+ p.a.</b>	Spend a lot more on food	Spend slightly more on beverages	Spend slightly less on gaming/wagering
<b>35-54 age bracket</b>	Spend the most overall with an ave. of \$148 per visit*	Spend 17% more than the 55-64 age brackets	Are the strongest revenue opportunity for hotels
<b>Under 25s and Retirees</b>	Spend the least in most areas	Are the weakest revenue opportunity for hotels	

*\*may include spending on other people*

## Hotel owners and managers

### The respondents representing hotels:



Average age of 47 years



31% work more than 60 hours a week – which is more than five 12 hour days (or six 10 hour days)



Work an average of 59 hours per week



Work an average of 5 hours more per week in F&B hotels than in gaming hotels

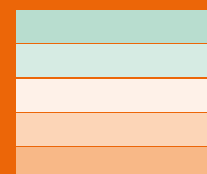
## Patron motivations

All respondents were asked to score the following on a scale of 1 – 7 in terms of their motivation to attend a venue (1 = low motivation, 7 = high motivation)

### Gaming hotels

Importance of hotel attendance reasons	Patrons (1-7)	Owner/managers overestimations
Spending time with friends	5.2	7%
Spending time with family	5.1	9%
Time out from work / personal lives	4.5	17%
Gaming facilities	3.7	29%
Spending time with colleagues	3.6	14%
Connecting with the local community	3.4	14%
Seeing a band/artist/performance/live entertainment	3.1	0%
Watching sport they would otherwise not have access to	2.7	30%
Meeting new people	2.6	17%
Other	2.5	29%

**Green** – Owner/ managers and patrons expectations aligned



### Food & Beverage hotels

Importance of hotel attendance reasons	Patrons (1-7)	Owner/managers over (+) and under (-) estimations
Spending time with friends	5.9	-1%
Spending time with family	5.5	-6%
Time out from work / personal lives	4.4	16%
Spending time with colleagues	4.1	17%
Seeing a band/artist/performance/live entertainment	4.0	-1%
Connecting with the local community	3.5	19%
Watching sport they would otherwise not have access to	2.8	16%
Meeting new people	2.7	20%
Other	2.2	20%
Gaming facilities	1.7	-3%

**Orange** – Owner/ managers overestimate or significantly underestimate the importance to the patron

# Snapshot

What aspects of a hotel are most important to patrons?

*"Good service and excellent meals"*  
- Hotel patron

/01  
Staff and  
service quality

/02  
Dining  
experiences

/03  
Security  
and safety

What makes patrons visit the same hotel repeatedly?



Food



Atmosphere



Customer service



Proximity to home

How do patrons perceive safety?

Patrons perceive licensed  
hotels and restaurants to be:

**46%** safer than nightclubs

**30%** more responsible with  
alcohol service than nightclubs

**13%** safer than bars

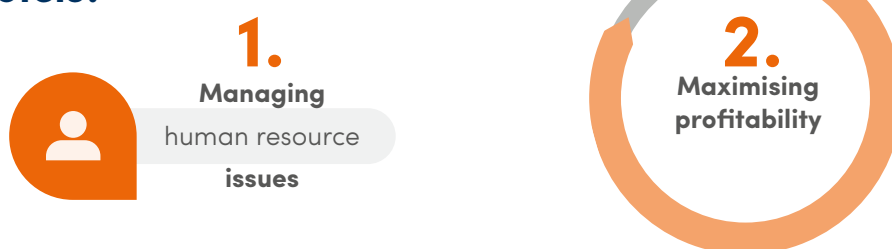




## What are hotels focusing on?

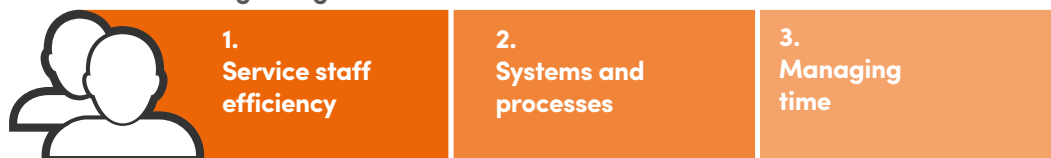


## What are the major obstacles for licensed hotels?



## What are the 3 most important influences on a licensed hotel's efficiency?

Owners and managers agree:



## Compliance check



*"LEGISLATION CHANGES are an unknown but hotels should be cognisant of how they may impact their business and ask themselves 'what would I do?' I would suggest thinking about how the changes may affect you and prepare for three change outcomes – best case scenario, worst case, and the middle ground. Creating a basic financial model for each of these scenarios will highlight what you could and couldn't afford depending on the legislation changes."*

## Which marketing activities have the most impact?

Advertising recall suggests word of mouth has the strongest impact on patrons so good customer service is critical.

**Creating positive customer experiences is the most effective marketing activity**

**Email campaigns were the second most recalled**



marketing medium for venue promotion, suggesting there is value in hotels building an electronic database for marketing purposes.

**Newspapers, social media and billboards / outdoor signage**

were the next most memorable marketing mediums. Targeted communication strategies with the aim of engaging with the local punter appears to be an effective approach as patrons are motivated to return to hotels that are closer to home.



## Making your mark

**Venues should focus on boosting patronage by:**

- Generating positive customer word of mouth recommendations
- Creating a social media plan with expert advice and/or automating posts with feed software
- Using localised communications and smartphone location-based advertising to reach potential patrons who live close by – they are the most likely to become a paying customer

## What trends are expected in the future?



**Owners and managers**

**VS**

**Patrons**



- Expect to see patronage drop over the next 5 years
- Expect technology use to increase

- Expect to frequent hotels as much if not more in future
- Expect to be able to use their smartphones to order, pay bills, and more in the future

# Vital stats



**94.3%**

94.3% of patrons expect to visit licensed hotels just as much as they do now. In 2 years' time 15.3% expect the frequency of their visits to increase.



**59  
hours**

Venue owners and managers work an average of 59 hours per week, with 1 in 4 working 70 hours or more each week.



**\$57\***

On average, the biggest food spenders are 35-44 year olds. With an average of \$57, this is 16% more than the next big spenders, the 45- 54 year olds.\*



**65+**

The over-65s visit licensed hotels with gaming facilities 2.8 times more frequently than F&B hotels.



**<55**

The under-55s attend non-gaming venues 80% more frequently than the over-55s.



**66%**

66% of patrons are more likely to post an online review about a positive venue experience than a negative one.

**53%**



53% of patrons are influenced by positive social media in deciding to attend a licensed hotel.



**53%**

53% of patrons have checked-in on social media at a licensed hotel.



**26%**

26% of patrons have used venue-specific smartphone apps.

*\* Food spend may include spending on other people such as family members, friends or colleagues*

## Efficiency check



*"Given the average venue owner and manager works well in excess of the average Victorian on a weekly basis, venues should look to outsource and streamline processes where possible. Outsourcing bookkeeping, payroll, suppliers and management reporting is one such initiative which On Tap Hospitality can assist with."*

## What motivates patrons to visit a licensed hotel?



1.

Spending time with friends



2.

Spending time with family



3.

Time out from work/personal lives



**Gaming hotels:**

Gaming facilities

4.



**F&B hotels:**

Spending time with colleagues

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**Hotel owners and managers overestimate the importance of the following patron motivations:**

- Access to sport they couldn't watch at home
- Meeting new people
- Connecting with the local community

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*"It's where I meet with friends after work – great service and very friendly staff."*

*– Hotel patron*

**Hotel owners and managers need to ensure their marketing messages are:**

- Tailored to patrons' primary motivations of spending time with friends and family
- Not investing too much energy into promoting things that aren't important to patrons

# Hotel facilities

How satisfied are you with facilities at your local venue?

Mean satisfaction	
Quality of staff / service	Very Satisfied
Security / Safety	
Venue amenities & ease of transport	
Quality of restaurant / dining facility	
Range of beverages available	
Family friendly	
Access to gaming machines / pokies facility	
Ambience / atmosphere	
Crowd demographic	
Reasonable price of beverages	
Live sport viewing	
Betting facility	
Promotional events	
Private function spaces	
Live entertainment (e.g. bands)	Very Dissatisfied

**But, are these  
important to patrons?**

Turn to page 12 to find out which  
facilities are most important to  
your patrons



## What's important to patrons?

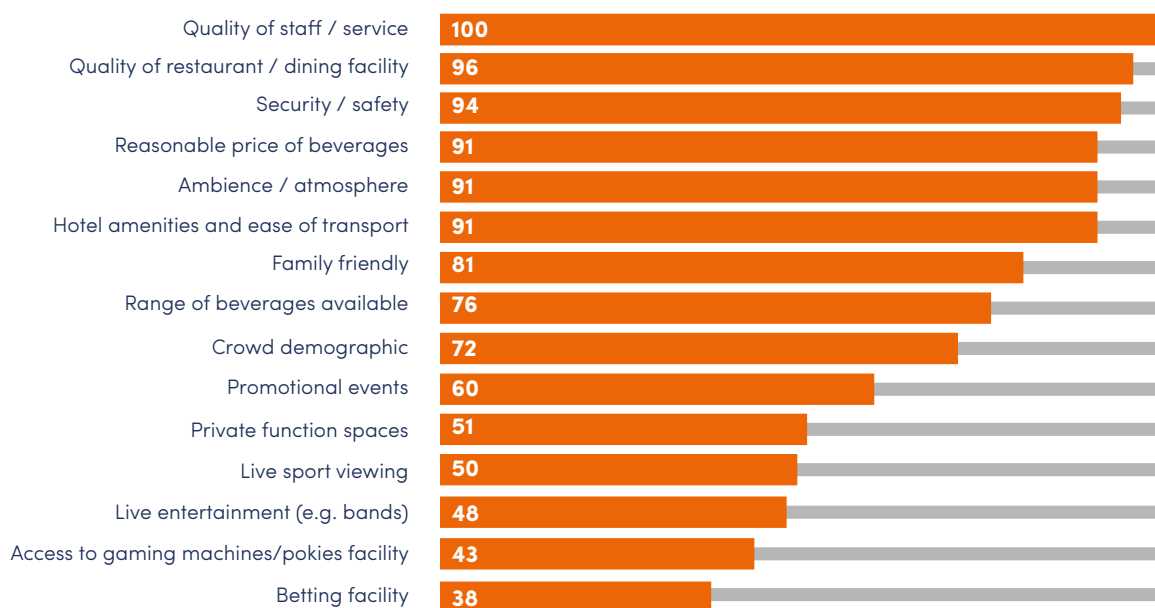
The three most important aspects of a licensed hotel are:



*"The staff have to be professional – interested in helping you and friendly."*  
- Hotel Patron

Beverage pricing, atmosphere, and amenities are all considered to be equally important.

## How important are your facilities to patrons



Patrons were asked to rate each item in relation to its importance. Rating scores were normalised so that the top rating is equal to 100 (100 = most important)

## Patrons perceive hotels to be:

### Safer

- **46%** safer than nightclubs
- **13%** safer than bars

### More responsible

- **30%** more responsible than nightclubs with alcohol service
- **6%** more responsible than bars with alcohol service

## What keeps patrons coming back to their favourite hotels?

Repeat patronage is most strongly influenced by:

Good gaming machines  
Atmosphere and ambience Entertainment Value for money  
**Friendly staff**  
Price **Food** Staff  
Drink Music **Service**





*"Friendly service from the friendly staff and good food."*

*– Hotel patron*

## What's important to different groups of patrons?

### F&B patrons vs Gaming patrons





Staff and service quality is the most important factor for both F&B hotel and gaming hotel patrons.

F&B patrons	Gaming patrons
Place a high importance on:	Place a high importance on:
 Entertainment (band/ live performance)	 Security/safety
 Socialising with friends and family	 Amenities and ease of transport

**F&B patrons tend to be a younger and more affluent group, spending 40% more on beverages each visit**

### General patrons vs Repeat patrons

Staff and service quality is important for both general and repeat patrons (5+ visits per month). Both groups have a comparable food and beverage spend.










Repeat patrons	General patrons
Place a high importance on:	Place a high importance on:
 Taking time out from work or life	 Restaurant/dining quality
 Access to sport they can't watch at home	
 Access to gambling/ betting facilities	

#### Repeat patrons are also:

 Less concerned with spending time with family than the average patron	 Much more likely to be male (56% of repeat patrons are male vs 45% for average patrons)
 More likely to be retirees	 Bigger gaming/wagering spenders

# Hotel focus on facilities

How do owners and managers attempt to differentiate their hotel from competitors?

 Customer service	 Venue location	 Food
 Atmosphere	 Family friendliness	 Demographic focused
 Newly renovated	 Old fashioned / old pub	 TAB facilities

## Do venues misjudge the importance of some hotel facilities to patrons?

Compared to patron ratings of importance, both F&B and Gaming hotels overinflate the importance of:

- ❌ Private function spaces
- ❌ Live sport viewing
- ❌ Access to pokies (Gaming hotels) and betting facilities (F&B hotels)

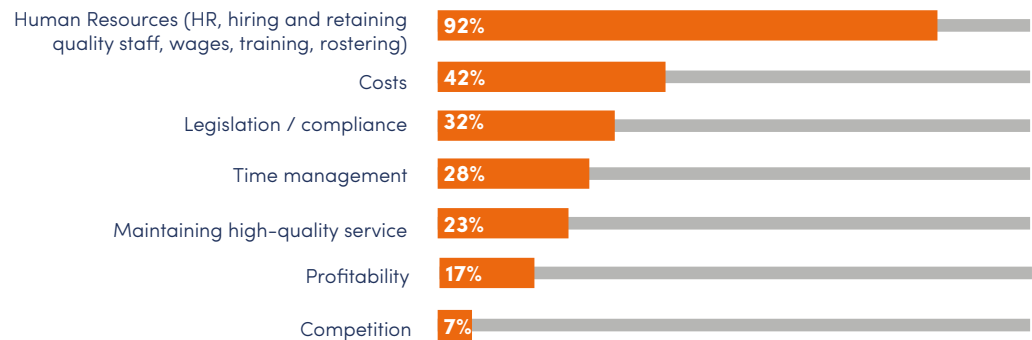
Hotel owners and managers may focus too much on less important factors (perhaps due to their financial investment in them) rather than what's most important to patrons:

- ✅ Staff and service quality
- ✅ Restaurant/dining quality
- ✅ Beverage prices
- ✅ Atmosphere
- ✅ Security/safety

# Key challenges

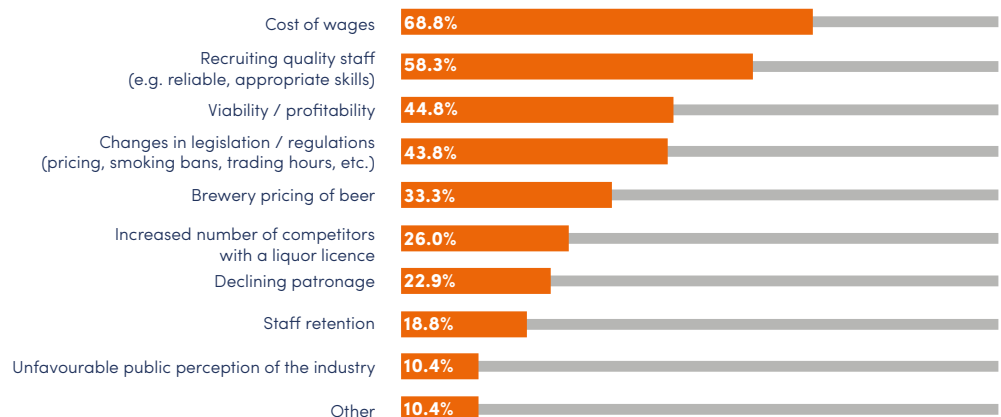
## What are the key challenges for hotel owners and managers?

### Top 3 greatest role challenges



- 1. The survey respondents' greatest challenge is human resources**  
92% noting that hiring and retaining good staff, wages, training and rostering were all contributing to their HR headaches.
- 2. The second biggest challenge identified was their business financials**  
42% naming costs as a challenge with a further 17% stating profitability was an issue.
- 3. Legislation and compliance** rounds out the top three greatest role challenges identified by owners and managers.

### Issues hotels are facing



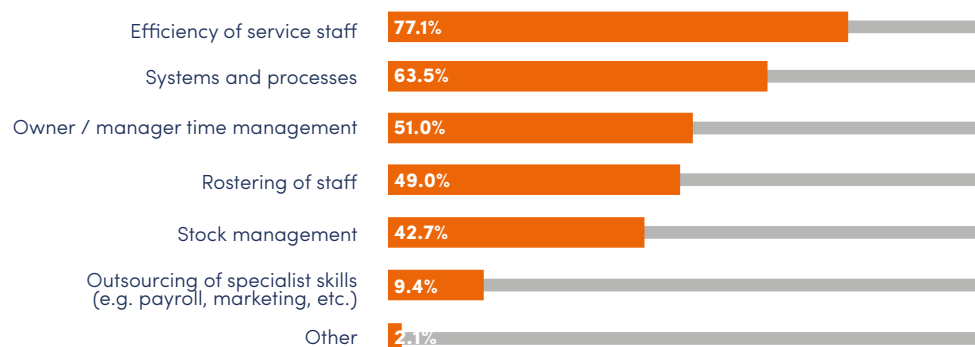
Owners and managers consider the top two issues their hotels face to be HR related, with the **cost of wages the number one issue** and **recruiting good staff a close second**.

18% also named staff retention as an issue, with the **third biggest issue being profitability**, closely followed by legislation changes.

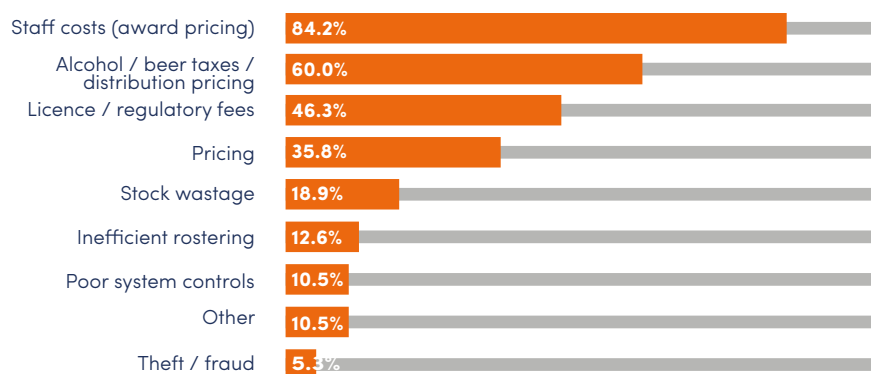


## What makes a licensed hotel efficient?

What do you think about your hotel's efficiency?  
What are the three most important factors?



What prevalent factors at your hotel are currently causing inefficiency or lower profitability?



## Human Resources



*HUMAN RESOURCES are a critical success factor for hotels. Patrons have revealed they value the quality of staff service most highly and hotels have revealed that HR issues cause the most headaches. Tim Stillwell recommends "To lift the quality of staff, hotels need to implement a robust and stringent vetting process for hiring".*

*AHA (Vic) members have the benefit of access to online procedures, policies, and templates to assist with HR and other day-to-day operations, and unlimited phone support from a Workplace Relations Advisor. As Tim points out, "once the right staff are in place, having a plan in place to keep them is just as critical. Consider a mentoring structure that develops staff and encourages longevity."*



**Efficiency of service staff is named as the most important factor** for hotel efficiency, however service staff efficiency is not mentioned in the factors believed to be causing inefficiency or lower profitability. This could be due to hotels holding a belief (rightly or wrongly) that their service staff are efficient, or hotels could simply be more focused on staff costs which they have named the number one factor causing lower profitability.



**Systems and controls** are noted by 63.5% of respondents as critical to a hotel's efficiency, whereas only 10.5% of owner/managers claim poor system controls is causing inefficiency.



**Stock management** is named as an important efficiency factor by 42% of respondents, with 18.9% stating stock wastage is currently causing lower profitability, however, only 5.3% noted theft and fraud are eating into profits.

**51%**

**Despite the challenges they face, 51% of owner/manager respondents said they anticipate working in the hospitality industry for more than 10 years.**

**Given their long-term commitment of 10 years+ to hospitality, it makes sense for owners and managers to make efficiency improvements now that will make their working lives easier and their businesses more profitable for the next decade.**

# Hotel goals

## What are owners and managers striving for?

The top priorities for owners and managers perfectly align with the HR and profitability challenges they face.

### Top 3 goals



**The top priority is HR** – staff motivation, teamwork, training and taking responsibility



**1 in 4 respondents aim to increase profits** – an additional 12% of respondents said their goal is to reduce costs (which in turn increases profits)



Rounding out the top three goals is **improving customer service and satisfaction** – which generates repeat business and that all-important positive word of mouth.

**Respondents noted that work-life-balance is equally as important as reducing costs.**

What's the real  
cost to your  
personal life if  
you're working  
59 hours a week?

# Marketing insights

## The impact of technology usage



64%

use the internet to research when deciding on a hotel



42%

have been influenced to **not** attend a licensed hotel by negative social media



53%

have been influenced by positive social media when considering attending a hotel



33%

are more inclined to post an online review about a positive experience than a negative experience at a hotel



53%

have checked-in at a licensed hotel on social media



26%

have used a hotel's specific smartphone app



47%

have reviewed which friends have attended a hotel before attending themselves



13%

have used location-based social networking apps at a hotel

### Key insight

Hotels can take advantage of these technology-based behaviours by ensuring their online presence is strong:

- Professional website with quality photos showcasing facilities and menu
- Website optimised for mobile devices, given increasing mobile/tablet use
- Positive online reviews created by good customer experiences – hotels should have a strategy for professionally managing negative online reviews
- Social media presence, equipped to professionally manage any negative comments and acknowledge/reward positive comments
- Consider creating a smartphone app

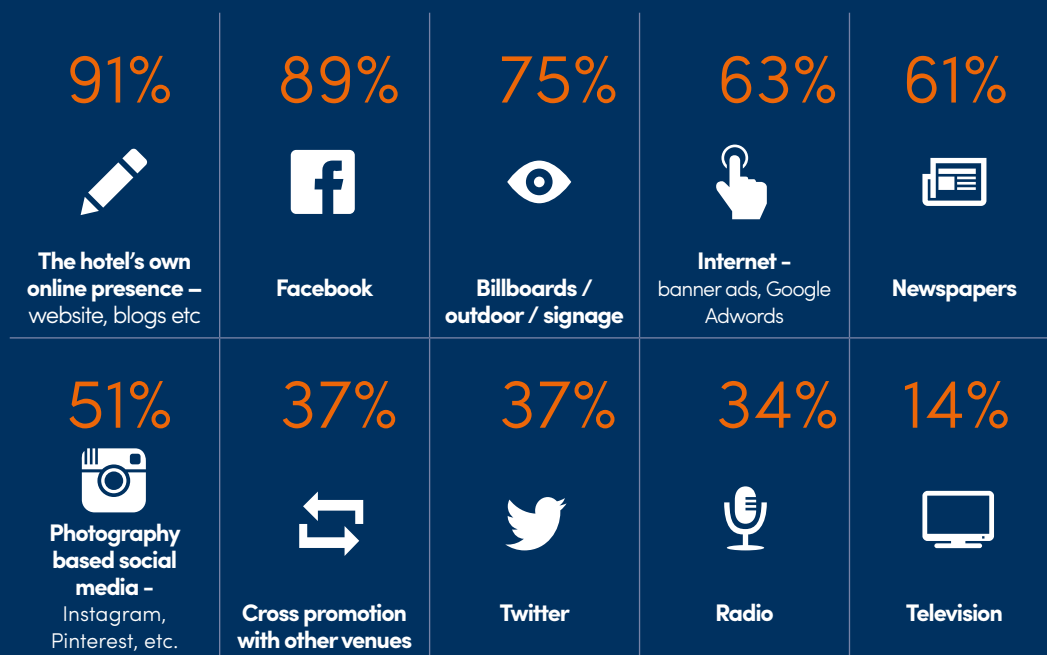
### Have you thought about?

#### Discussing social media with an expert?

Have a chat to the AHA (Vic) about who they can connect you with.

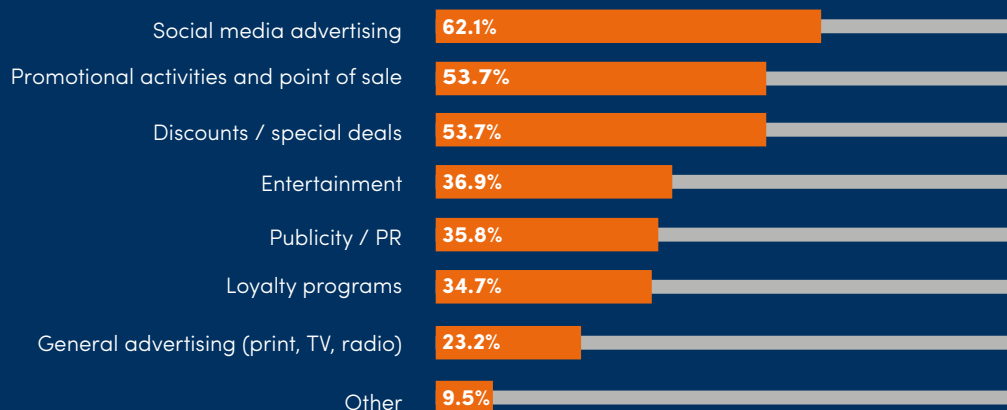
- Using social media as an interactive database and community engagement tool?
- Doing an online health check? When was the last time you did a strategic stocktake?
- How your online presence can leverage customers' motivation based on hotel proximity?

## Which marketing channels are hotels using?



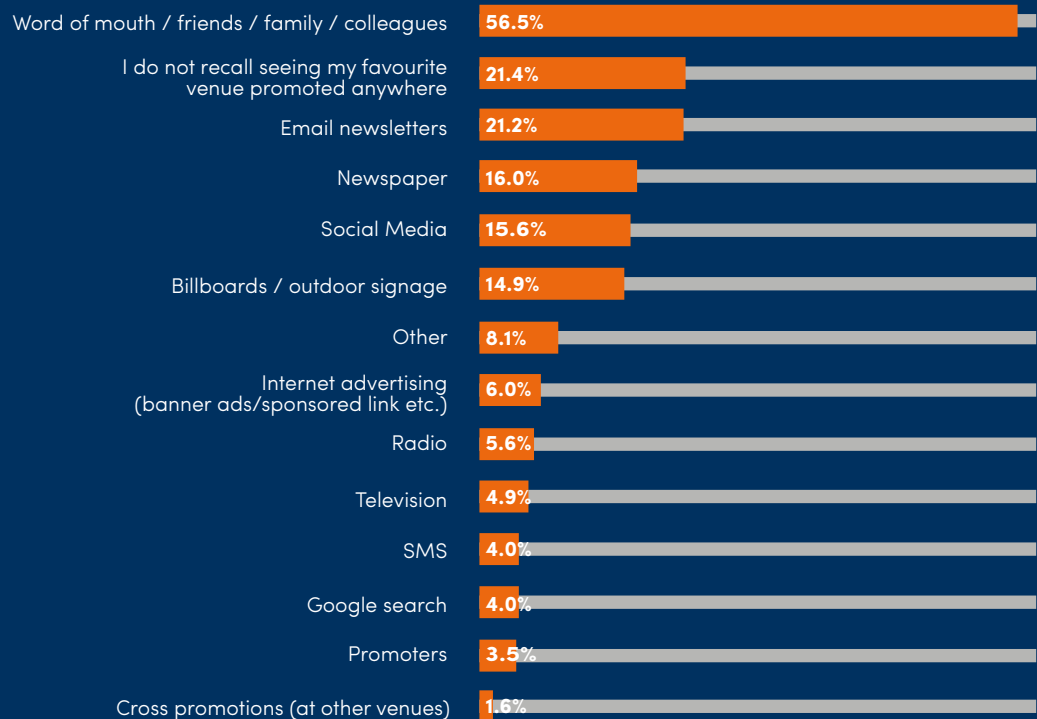
## Which marketing channels work?

What strategies have you found effective for generating foot traffic and increased patronage?





## Advertising recall for your favourite hotel\*



\*a patron's most attended hotel

**Social media** has been named by owners and managers as the most effective means of driving foot traffic and increasing patronage, which is in line with patron technology usage.

The best marketing cut through from a patron recall perspective is with social media, newspapers, outdoor advertising and email newsletters.

An interesting insight for hotel owners and managers is that social media is currently marginally more important than outdoor signage and billboards and almost on par with newspaper advertising in terms of patron recall. This indicates that social media strategies are perhaps not having the full intended effect.

### Communications messaging

Strong marketing communications should focus on the top drivers for patrons - taking time out from work and spending time with family and friends.

### Word-of-mouth and social media

Word of mouth is 35% more recalled than all other forms of advertising so hotels need to ensure they are creating a positive customer experience through quality staff and food to help generate positive word of mouth.

Having a strong social media strategy is not only one of the most cost effective forms of advertising, it is also another way hotels can ensure positive word-of-mouth spreads quickly.

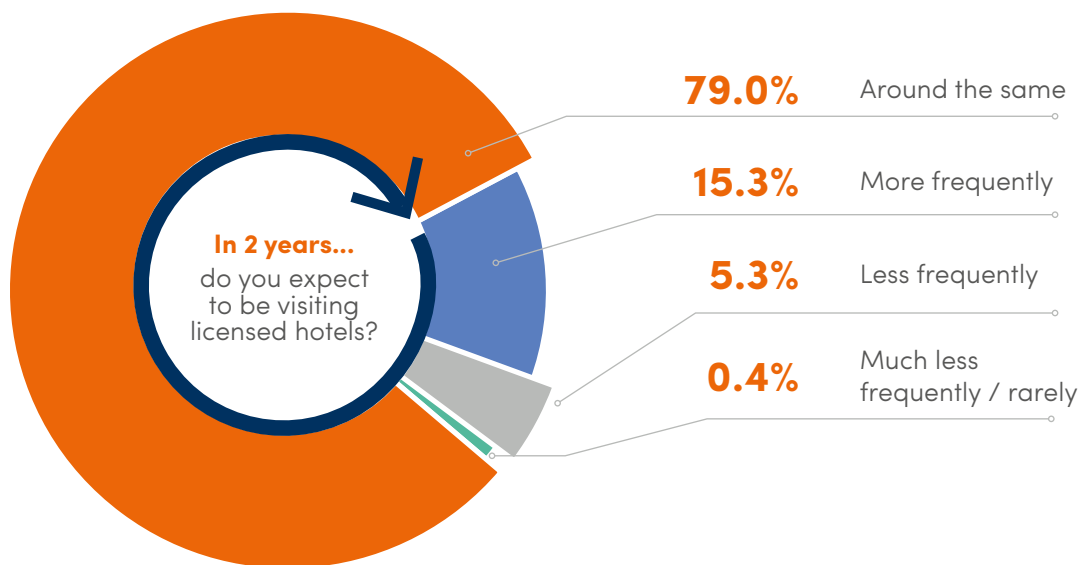
**Social media works so make the most of it!**





# The future

## What does the future hold for licensed hotels?



### Owners and managers believe the differences in their hotels will be:

- Greater use or more reliance on technology and multi-media
- More renovations and refurbishments
- Bottle shop removed or revised

Given patrons' strong technology-based behaviour at present, it stands to reason that hotels will need to place more of an emphasis on technology to meet customers' expectations and enhance their experiences in the future.

### Good news story

Whilst owner/managers stated declining patronage would be a key trend over the next 3 years, the vast majority of customers expect they will visit licensed hotels with the same frequency, if not more frequently.

**Less than 6% expect their visits to be less frequent.**



# About the survey

**This publication is a research initiative conducted by ShineWing Australia.**

The survey aims to provide useful insights for AHA (Vic) members – informing hotel owners and managers of current trends and patron behaviour, and stimulating conversations about improvements to reduce headaches and maximise future profits.

For this survey, responses were collected from more than 100 metro and regional owners and managers of licensed AHA (Vic) member hotels across Victoria, and licensed venue patrons from across Victoria.

Victorian hotels surveyed are members of the AHA (Vic) and were represented by the following venue owners and managers:

- **42.5%** with gaming facilities
- **94.3%** with a restaurant/dining area
- **92.5%** with a public bar area
- **76.4%** independent hotels

Survey responses reflect a range of patron demographics and geography, as well as a variety of licensed venue types and locations across Victoria.



# Profiles



**Tim Stillwell**

Partner,  
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Director,  
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Tim has over 18 years of experience working with Australian hotels and is a recognised specialist in hospitality and gaming. At ShineWing Australia, he is the leading advisor to the hotel and club industries.

Tim currently consults on all aspects of financial modelling, budgeting and business planning along with advisory on hotel acquisition and sale transactions. Furthermore, he appears as an expert witness at VCGLR and VCAT hearings for gaming expenditure analysis and financial viability assessments.

Tim and his team of accountants and consultants have the expertise to assist venues with their accounting, tax, audit services, risk management, outsourced accounting and management reporting, payroll, benchmarking and statutory reporting requirements.



ShineWing Australia, is an accounting and advisory firm that has enjoyed an 80-year history of delivering

exceptional service for Australian businesses.

Over that time, the firm has built a reputation for service, quality and commitment to the growth and success of its clients.

We are proud to have created many long standing relationships that have often extended into decades and sometimes generations.

Our reputation has been built through the talent and integrity of our people and it's our people who continue to differentiate us today. We have over 250 staff and 30 partners and we're growing. Our people bring together a powerful range of skills, experiences and perspectives to help drive the growth of your business.

Let's discuss the possibilities.



On Tap Hospitality is a joint venture between accounting firms ShineWing Australia and Zorba

Financial Services, both of whom proudly specialise in accounting and consulting services to the hospitality industry. The team at On Tap Hospitality provide a wide range of financial services including bookkeeping, accounting, monthly management and board reports, payroll, general ledger preparation, weekly supplier payments, budgeting assistance, daily reconciliations, statutory lodgements (e.g. BAS & payroll tax), weekly and monthly KPI feedback and benchmarking.

Based in Victoria, the On Tap Hospitality team are dedicated to working with hotels (and clubs), both gaming or non-gaming, to ensure owners are making informed decisions, achieving their financial goals and focusing on their core business.

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The overarching objective of the Australian Hotels Association (Victoria) is to effectively contribute to the establishment and maintenance of an economic and social environment that fosters the

business success of members and Victorian pubs and hotels generally.

AHA (Vic) is the pre-eminent Victorian hospitality industry association representing the rights and interests of its members to State, Federal and Local government, other relevant parties and the community. AHA (Vic) provides industry leadership, lobbies on members' behalf and promotes best practice in hotel management, with a commitment to effective communication with members.

Tourism Accommodation Australia (Victoria), a division of AHA (Vic), actively contributes to the development and growth of tourism and tourism-related industries. TAA (Vic) represents the commercial interests of 3, 4 and 5 star accommodation providers including hotel, resorts and serviced apartments.

Within the diverse Victorian hospitality industry, AHA (Vic) and TAA (Vic), membership incorporates CBD, metropolitan, regional and rural hotels and pubs, accommodation hotels, resorts and similar businesses.



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Omnyfy Research is proficient in understanding what stakeholders think about a company, brand, product or service. They will identify any gaps in expectations versus actual delivery. They will execute quantitative and qualitative research to unearth key customer drivers such as needs, behaviours, fears, goals and motivations that lead them to your desired outcome (e.g. product purchase).

Omnyfy Research recognizes which research types will yield the most effective outcomes for your objectives, and will help you discover more about your markets and/or business to best position yourself for future success.





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