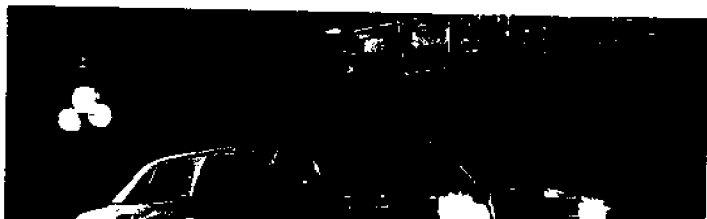
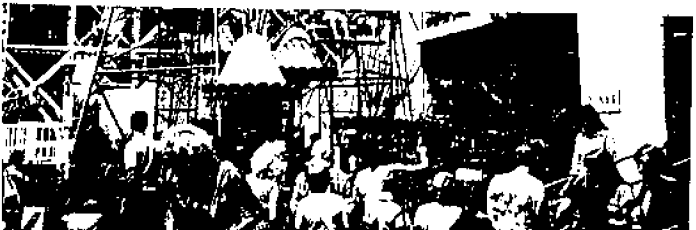
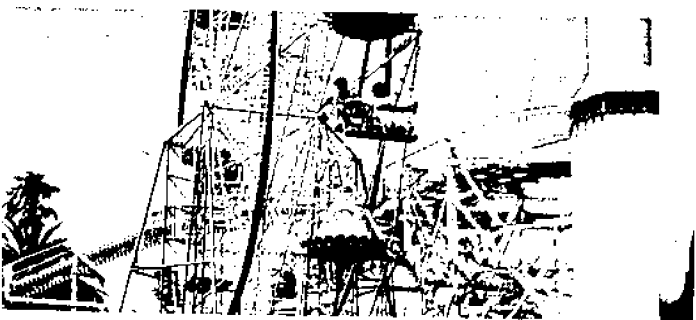
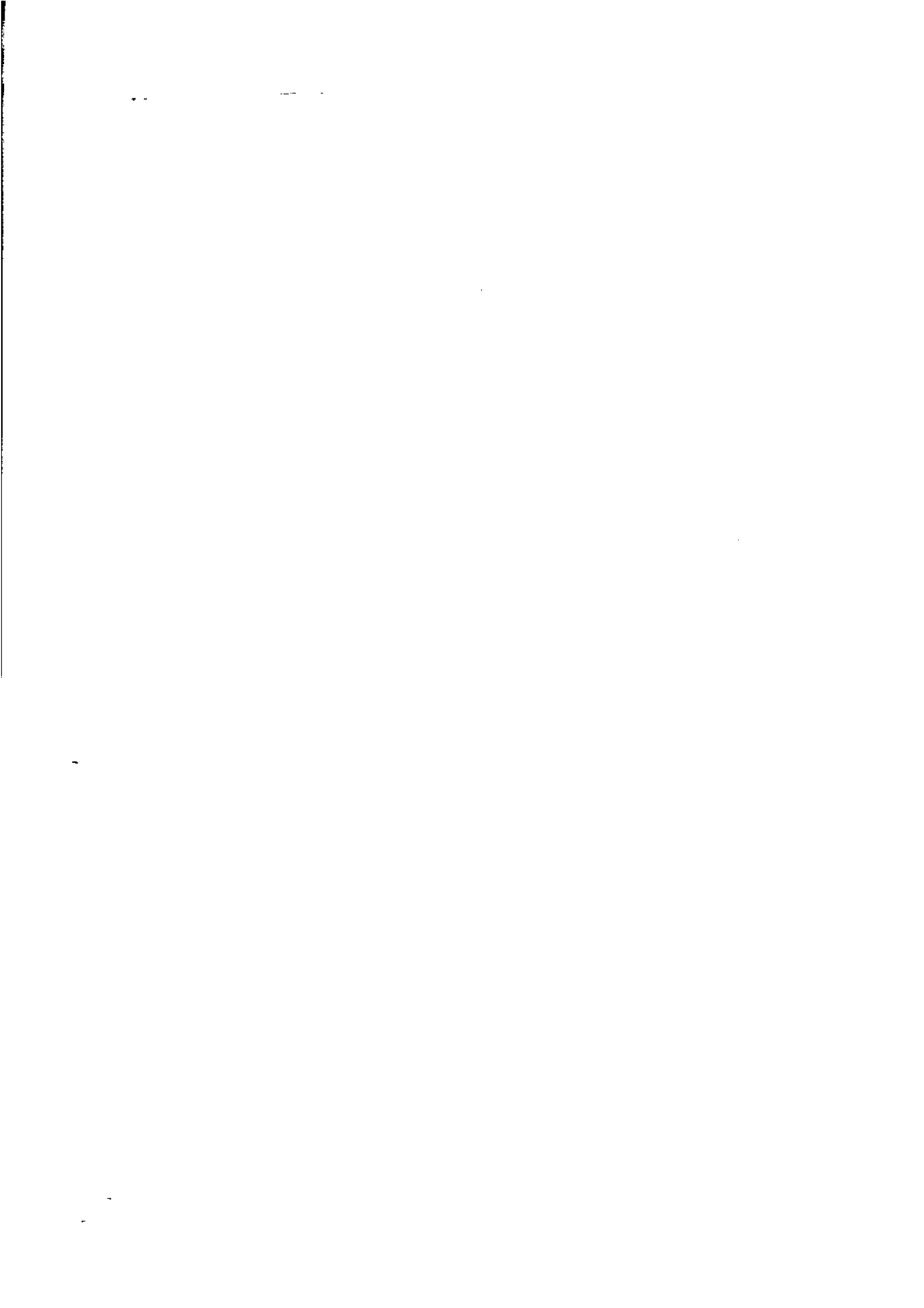




HOSPITALITY INDUSTRIES AUSTRALIA 1991 - 92





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HOSPITALITY INDUSTRIES
AUSTRALIA
1991-92

Ian Castles
Australian Statistician

Acknowledgement for Photos on Cover:

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INQUIRIES

- *for further information about statistics in this publication and the availability of related unpublished statistics, contact Dennis Robson on Melbourne (03) 615 7634.*
 - *for information about other statistics and services please refer to the back page of this publication.*
-

INTRODUCTION

In respect of the 1991-92 financial year, the ABS conducted a series of surveys on tourism-related industries. These industries included motor vehicle hire, hospitality, and amusement and theme parks.

Information in this publication was collected in a survey of businesses classified to Division H, Accommodation, Cafes and Restaurants and Class 9322, Casinos, of the 1993 edition of the Australian and New Zealand Standard Industrial Classification (ANZSIC) (see paragraphs 4-6 of the Technical Notes). Division H includes all units mainly engaged in providing hospitality services in the form of accommodation, meals and drinks, and includes Accommodation; Cafes and restaurants; Pubs, bars and taverns, and Licensed clubs industry classes.

In addition to this publication, data from the two additional surveys have been released in the following publications:

- . *Motor Vehicle Hire, Australia, 1991-92 (8652.0);*
- . *Amusement and Theme Parks, Australia, 1991-92 (8675.0).*

These publications contain only a small portion of the information available from the surveys. More detailed information is available from the ABS on request. This includes in-depth statistical analysis in formats tailored to meet the needs of individual clients.

For the 1992-93 reference year the ABS collected information on a range of business services comprising legal, accounting, business management, advertising, architecture, computing, real estate, market research, surveying, consultant engineering and computer services. For the 1993-94 reference year the ABS is surveying the film and video production and distribution industries, motion picture exhibition and television and radio services industries.

The ABS is committed to providing more information on the priority service industries sector of the economy. However, the breadth of activities encompassed in the sector poses the problem of selecting the industries to include. To this end the ABS welcomes comments and suggestions from users recommending industries and data items for inclusion in future surveys. These comments should be addressed to: The Director, Service Industries Surveys, PO Box 10, Belconnen, ACT, 2616.

IAN CASTLES
Australian Statistician

Australian Bureau of Statistics
Belconnen ACT 2616
21 October 1994



SECTION 1 THE HOSPITALITY INDUSTRIES - AN OVERVIEW

Introduction

The hospitality industries comprise businesses whose primary activities are the provision of accommodation, selling of alcoholic beverages for consumption on the premises, provision of food and entertainment. The businesses are classified to the following classes of the Australian and New Zealand Standard Industrial Classification.

- Accommodation (ANZSIC 5710)
- Pubs, bars and taverns (ANZSIC 5720)
- Cafes and restaurants (ANZSIC 5730)
- Licensed clubs (ANZSIC 5740)
- Casinos (ANZSIC 9322)

Significance of hospitality industries

The hospitality industries contributed almost 2 per cent to the Australian Gross Domestic Product GDP(P) in 1991-92. These industries were responsible for just over 4 per cent of total Australian employment.

Summary of main features

The major findings of the 1991-92 survey of the hospitality industries showed:

- The number of businesses was 21,221 at 30 June 1992;
- Employment at the end of June 1992 was 338,000;
- Sales of goods and services was almost \$19 billion;
- Gross expenses were almost \$19 billion; and
- Profit levels were reduced in all industries (excluding casinos) between 1986-87 and 1991-92.

TABLE 1.1 SUMMARY OF OPERATIONS BY INDUSTRY, AUSTRALIA 1991-92

<i>Items</i>		<i>Accommodation</i>	<i>Pubs, bars and taverns</i>	<i>Cafes and restaurants</i>	<i>Licensed clubs</i>	<i>Casinos</i>	<i>Total hospitality industries</i>
Businesses							
Businesses at end June	No.	4,314	4,347	8,741	3,811	8	21,221
Employment							
Employment at end June	No.	74,136	73,526	120,752	60,424	9,218	338,056
Income from sales of goods and services(a)							
	\$m	3,820.2	5,834.2	4,608.3	3,729.2	788.2	18,780.1
<i>Less</i>							
Purchases and selected expenses	\$m	2,212.6	4,377.9	2,927.9	2,252.7	421.4	12,192.5
Trading profit	\$m	1,607.6	1,456.3	1,680.5	1,476.5	366.7	6,587.6
<i>Plus</i>							
Interest income	\$m	95.9	21.0	16.6	49.0	6.4	188.9
Other income(a)	\$m	65.6	56.4	31.5	32.3	23.2	209.0
<i>Less</i>							
Labour expenses	\$m	1,263.8	967.4	1,293.7	1,061.5	244.8	4,831.2
Depreciation	\$m	243.6	106.0	106.9	208.3	22.6	687.4
Other expenses (excl. interest)	\$m	47.6	34.2	46.1	34.4	2.6	164.8
Earnings before interest and tax	\$m	214.2	426.1	281.9	253.7	126.3	1,302.0
<i>Less</i>							
Interest expenses	\$m	533.3	328.1	134.0	75.4	27.3	1,098.2
Operating profit before tax	\$m	-319.2	*97.9	147.9	178.2	99.0	*203.8
Industry Gross Product	\$m	1,674.9	1,456.3	1,680.5	1,504.3	387.0	6,702.9
Operating profit margin	%	-8.4	1.7	3.2	4.8	12.8	1.1

(a) Income from rent, leasing and hiring is included in Other income for the Accommodation, Licensed clubs and Casino industries.

**TABLE 1.2 DISTRIBUTION OF BUSINESSES BY RANGE OF
OPERATING PROFIT/LOSS, BEFORE TAX, FOR THE HOSPITALITY
INDUSTRIES (EXCLUDING CASINOS), AUSTRALIA, 1991-92**

<i>Operating profit/loss before tax</i>	<i>Total number of businesses</i>	<i>Per cent</i>
BUSINESSES REPORTING PROFIT		
Greater than \$500,000	248	1.2
\$100,000 to \$499,999	1,695	8.0
\$50,000 to 99,999	2,230	10.5
\$20,000 to \$49,999	4,007	18.9
\$5,000 to \$19,999	3,844	18.1
\$1,000 to \$4,999	1,373	6.5
Total	13,397	63.1
BUSINESSES BREAKING EVEN		
	805	3.8
BUSINESSES REPORTING LOSSES		
\$1,000 to \$4,999	1,287	6.1
\$5,000 to \$19,999	2,152	10.1
\$20,000 to \$49,999	1,750	8.2
\$50,000 to \$99,999	765	3.6
\$100,000 to \$299,999	711	3.4
Greater than \$300,000	354	1.7
Total	7,019	33.1

Business profits and losses

Using operating profit before tax as an indicator, 63 per cent of businesses in the hospitality industries operated at a profit during 1991-92.

Thirty-three per cent of businesses reported losses. This was higher than the 26 per cent of all non-farm businesses reporting losses over the same period.

More information?

Industry performance ratios for the hospitality industries can be made available on request.

SECTION 2 A HISTORICAL PERSPECTIVE

The ABS surveyed the hospitality industries in 1979-80 and 1986-87 in addition to the survey conducted in 1991-92. However, the casinos industry was surveyed for the first time in 1991-92.

Overview

The hospitality industries experienced considerable growth over the twelve years between 1979-80 and 1991-92.

Differences between industries

Not all of the hospitality industries experienced the same growth over the five years since the 1986-87 survey.

The accommodation industry showed strong growth (13 per cent) in the number of businesses, and in total employment (36 per cent) between 1986-87 and 1991-92. However, whilst total operating income increased by 78 per cent, purchases and selected expenses increased by 95 per cent.

Pubs, bars and taverns was the largest of the hospitality industries generating almost one third of total operating income. However, during the five years to 1991-92, this industry experienced an 8 per cent decline in the number of businesses, a 7 per cent drop in total employment and only small growth in total operating income (25 per cent).

In sharp contrast to the pubs, bars and taverns industry, cafes and restaurants experienced large increases in employment (43 per cent), the number of businesses (14 per cent) and total operating income (82 per cent).

Moderate growth was experienced by the licensed clubs industry.

TABLE 2.1 SELECTED DATA ITEMS, AUSTRALIA 1979-80, 1986-87 AND 1991-92

Items		1979-80	1986-87	1991-92
Accommodation (ANZSIC 5710)				
Businesses at end June	No.	3,259	3,826	4,314
Employment at end June	No.	38,620	54,412	74,136
Wages and salaries	\$m	246.1	639.6	1,205.0
Total operating income (a)	\$m	814.3	2,179.8	3,887.5
Purchases and selected expenses (b)	\$m	283.3	1,134.8	2,212.4
Operating profit before tax	\$m	n.a.	81.1	-319.2
Industry Gross Product	\$m	n.a.	1,055.7	1,674.9
Pubs, bars and taverns (ANZSIC 5720)				
Businesses at end June	No.	5,365	4,704	4,347
Employment at end June	No.	77,277	79,425	73,526
Wages and salaries	\$m	441.7	768.6	928.6
Total operating income (a)	\$m	2,590.3	4,667.9	5,834.2
Purchases and selected expenses (b)	\$m	1,686.9	3,459.7	4,385.7
Operating profit before tax	\$m	n.a.	136.2	97.9
Industry Gross Product	\$m	n.a.	1,251.1	1,456.3

**TABLE 2.1 SELECTED DATA ITEMS, AUSTRALIA 1979-80, 1986-87
AND 1991-92 - continued**

<i>Items</i>		1979-80	1986-87	1991-92
Cafes and restaurants (ANZSIC 5730)				
Businesses at end June	No.	5,054	7,645	8,741
Employment at end June	No.	59,702	84,401	120,752
Wages and salaries	\$m	302.1	646.0	1,246.8
Total operating income (a)	\$m	1,101.8	2,526.4	4,608.3
Purchases and selected expenses (b)	\$m	574.4	1,592.0	2,932.1
Operating profit before tax	\$m	n.a.	130.3	147.9
Industry Gross Product	\$m	n.a.	945.4	1,680.5
Licensed clubs (ANZSIC 5740)				
Businesses at end June	No.	3,128	3,601	3,811
Employment at end June	No.	52,372	52,336	60,424
Wages and salaries	\$m	423.6	687.6	1,012.4
Total operating income (a)	\$m	1,516.3	2,615.3	3,757.0
Purchases and selected expenses (b)	\$m	583.0	1,547.6	2,248.8
Operating profit before tax	\$m	n.a.	209.6	178.2
Industry Gross Product	\$m	n.a.	1,075.3	1,504.3
Hospitality industries (ANZSIC subdivision 57) - excluding Casinos				
Businesses at end June	No.	16,806	19,776	21,213
Employment at end June	No.	227,971	270,574	328,838
Wages and salaries	\$m	1,413.5	2,741.8	4,392.8
Total operating income (a)	\$m	6,022.7	11,989.4	18,087.0
Purchases and selected expenses (b)	\$m	3,127.6	7,734.1	11,779.0
Operating profit before tax	\$m	n.a.	557.2	104.8
Industry Gross Product	\$m	n.a.	4,327.5	6316.0

(a) In 1986-87, only NSW had income from gambling for cafes and restaurants, accommodation and pubs, bars and taverns. (b) Credit card commission charges was not collected in 1986-87. There were no gambling taxes for cafes and restaurants, pubs and accommodation establishments in 1986-87, except in NSW and ACT. Liquor licence fees was not collected for cafes and restaurants in 1986-87.

**TABLE 2.2 AVERAGE ANNUAL GROWTH RATES FOR THE
HOSPITALITY INDUSTRIES (EXCLUDING CASINOS), AUSTRALIA**

<i>Item</i>	<i>Average annual rate of growth</i>		
	<i>1979-80 to 1991-92</i>	<i>1979-80 to 1986-87</i>	<i>1986-87 to 1991-92</i>
	(%)		
Number of businesses	2.2	2.5	1.5
Employment	3.7	2.7	4.3
Wages and salaries	17.6	13.4	12.0
Total operating income	16.7	14.2	10.2

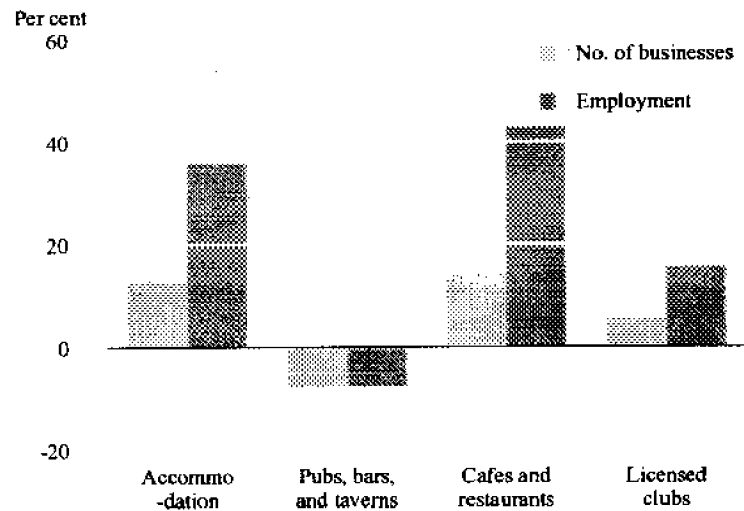
Number of businesses

Between 1979-80 and 1991-92, the number of businesses in the hospitality industries (excluding casinos) increased overall by 26 per cent to 21,213. The majority of this increase occurred during the earlier period 1979-80 to 1986-87 when the growth in the number of businesses was 2.5 per cent per year.

Employment

Employment increased in the hospitality industries by 44 per cent between 1970-80 and 1991-92 to 328,838. Unlike other areas of growth, the majority of this growth took place during the later period 1986-87 to 1991-92 when then annual growth in employment was 4.3 per cent. Between 1979-80 and 1986-87 employment increased by only 2.7 per cent per year.

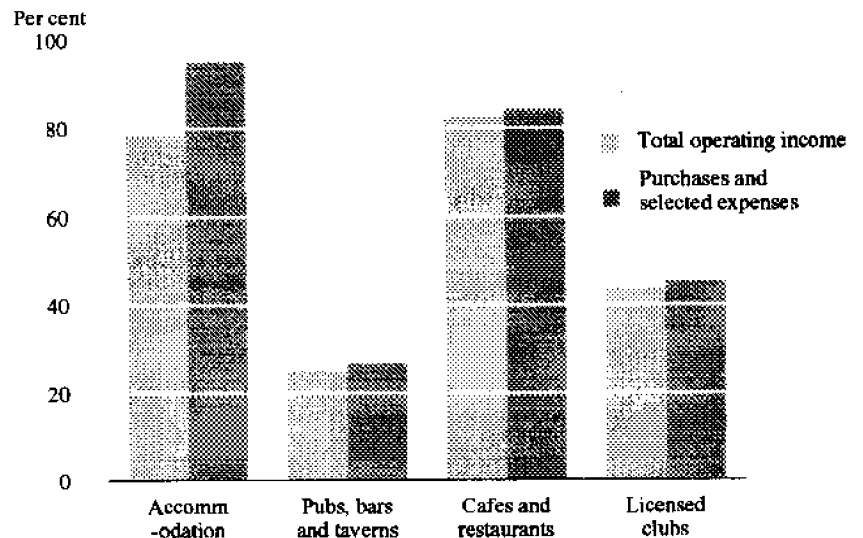
CHART 2.1 NUMBER OF BUSINESSES AND EMPLOYMENT: PERCENTAGE CHANGE, AUSTRALIA, 1986-87 TO 1991-92



Total operating income

Total operating income increased by 200 per cent between 1979-80 and 1991-92 to \$18,087m. The accommodation industry experienced the largest increase (377 per cent) in total operating income and pubs, bars and taverns the smallest (125 per cent). Total operating income per business increased by 137 per cent (69 per cent between 1979-80 and 1986-87 and 40 per cent between 1986-87 and 1991-92). This increase was slightly lower than the inflation rate. Total operating income per person employed increased by only 112 per cent over the twelve year reference period.

CHART 2.2 TOTAL OPERATING INCOME AND PURCHASES AND SELECTED EXPENSES: PERCENTAGE CHANGE, AUSTRALIA, 1986-87 TO 1991-92



Operating profit before tax

Overall the hospitality industries (excluding casinos) experienced a decrease of 81 per cent in operating profit before tax between 1986-87 and 1991-92. Cafes and restaurants was the only hospitality industry to record an increase (14 per cent).

SECTION 3 A STATE PERSPECTIVE

TABLE 3.1 MAJOR DATA ITEMS BY INDUSTRY AND STATE, 1991-92

Items	Unit	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
Accommodation (ANZSIC 5710)										
Selected income(a)	\$m	1,259.0	693.0	892.0	172.4	286.8	89.8	133.8	90.1	3,616.9
Wages and salaries	\$m	415.3	216.1	309.5	53.3	106.7	26.5	47.8	29.7	1,205.0
Total employment	No.	24,843	14,373	18,163	3,748	6,379	1,946	2,700	1,983	74,136
Businesses in each State										
at end June 1992(b)	No.	1,736	1,113	948	304	324	176	104	56	4,761
Businesses in Australia										
at end June 1992(c)	No.	1,630	1,029	854	273	277	146	73	31	4,314
Pubs, bars and taverns (ANZSIC 5720)										
Selected income	\$m	1,714.5	1,304.2	1,557.1	539.2	532.7	152.8	59.3	29.1	5,889.1
Wages and salaries	\$m	264.6	226.0	201.8	104.1	90.7	26.7	9.5	5.3	928.6
Total employment	No.	21,020	18,172	14,725	8,759	7,434	2,300	691	426	73,526
Businesses in each State										
at end June 1992(b)	No.	1,387	1,004	833	504	396	183	24	38	4,369
Businesses in Australia										
at end June 1992(c)	No.	1,373	1,003	833	501	392	182	24	38	4,347
Cafes and restaurants (ANZSIC 5730)										
Selected income	\$m	1,553.1	1,239.5	787.3	356.0	425.7	94.0	47.0	114.5	4,617.0
Wages and salaries	\$m	410.5	344.7	210.4	90.9	122.3	25.3	13.1	29.5	1,246.8
Total employment	No.	40,198	31,792	20,444	9,314	11,871	3,015	1,024	3,095	120,752
Businesses in each State										
at end June 1992(b)	No.	3,349	2,121	1,321	639	775	302	85	199	8,793
Businesses in Australia										
at end June 1992(c)	No.	3,342	2,117	1,309	631	766	299	82	193	8,741
Licensed clubs (ANZSIC 5740)										
Selected income	\$m	2,772.6	234.6	335.3	103.5	117.0	45.0	38.8	113.5	3,760.2
Wages and salaries	\$m	753.6	73.1	79.4	28.5	30.3	10.6	8.5	28.4	1,012.4
Total employment	No.	40,677	5,357	6,037	2,671	2,655	853	516	1,658	60,424
Businesses in each State										
at end June 1992(b)	No.	1,544	512	728	399	352	164	44	67	3,811
Businesses in Australia										
at end June 1992(c)	No.	1,544	512	728	399	352	164	44	67	3,811
Hospitality industries (ANZSIC subdivision 57) - excluding casinos										
Selected income(a)	\$m	7,299.2	3,471.3	3,571.7	1,171.1	1,362.2	381.6	278.9	347.2	17,883.2
Wages and salaries	\$m	1,844.0	859.9	801.1	276.8	350.0	89.1	78.9	92.9	4,392.8
Total employment	No.	126,738	69,694	59,369	24,492	28,339	8,114	4,931	7,162	328,838
Businesses in each State										
at end June 1992(b)	No.	8,017	4,750	3,831	1,846	1,847	825	258	361	21,734
Businesses in Australia										
at end June 1992(c)	No.	7,890	4,661	3,724	1,804	1,787	791	224	330	21,213

(a) Selected income for all industries is gross income minus dividends received, royalties and interest income. For the accommodation industry selected income also excludes other income. (b) Multi-state businesses are counted in each State of operation and hence States do not sum to the total for Australia. (c) Businesses are counted once only in State of Australian head office.

State comparisons

Of the 21,213 businesses in the hospitality industries (excluding casinos) in Australia at end of June 1992, 37 per cent operated in New South Wales. Businesses in this State accounted for 41 per cent of selected income and 39 per cent of total employment.

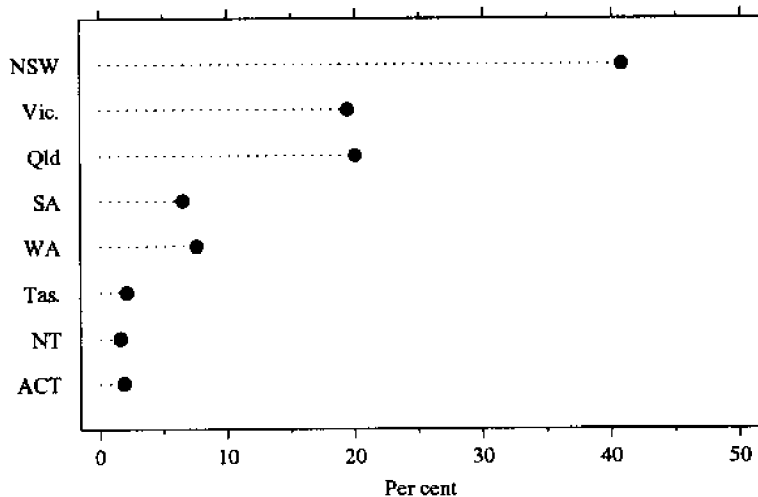
Hospitality businesses in Queensland accounted for 20 per cent of selected income compared with Victoria which accounted for 19 per cent.

TABLE 3.2 SELECTED INCOME PER BUSINESS OPERATING IN EACH STATE AT THE END OF JUNE BY INDUSTRY AND STATE, 1991-92

<i>Industry</i>	<i>NSW</i>	<i>Vic.</i>	<i>Qld</i>	<i>SA</i>	<i>WA</i>	<i>Tas.</i>	<i>NT</i>	<i>ACT</i>	<i>Aust.</i>
	\$'000								
Accommodation	725	623	941	567	885	510	1,287	1,609	760
Pubs, bars and taverns	1,236	1,299	1,869	1,070	1,345	835	2,471	766	1,348
Cafes and restaurants	464	584	596	557	549	311	553	575	525
Licensed clubs	1,796	458	461	259	332	274	882	1,694	987

For all States except the ACT and NSW pubs, bars and taverns had the highest selected income per business.

CHART 3.1 PERCENTAGE OF SELECTED INCOME BY STATE FOR THE HOSPITALITY INDUSTRIES, AUSTRALIA, 1991-92



SECTION 4 BUSINESS SIZE

Industry concentration statistics

Industry concentration statistics are concerned with providing measures of the extent to which a few businesses predominate in an industry and how the businesses in each grouping differ in market influence.

Concentration of businesses in the hospitality industries

None of the hospitality industries showed evidence of any significant concentration with regard to employment and gross income.

The accommodation industry was the most concentrated: the 20 largest businesses which represented 0.5 per cent of businesses accounted for 28 per cent of gross income and 21 per cent of employment. The 4 largest businesses were primarily responsible for the industry's operating loss before tax.

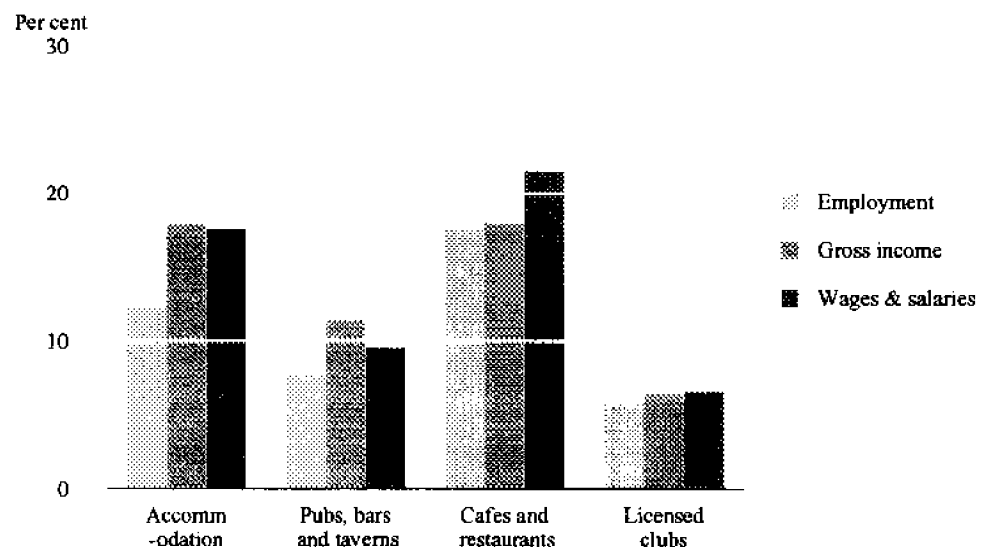
The four largest businesses in the pubs, bars and taverns industry accounted for only 6 per cent of employment and 10 per cent of gross income but a large 41 per cent of operating profit before tax. These four businesses were considerably larger than the other businesses in this industry.

The four largest businesses in the cafes and restaurants industry accounted for 14 per cent of employment.

The licensed clubs industry was the least concentrated: the 20 largest businesses which represented 0.5 per cent of businesses accounted for only 12 per cent of gross income.

The four largest businesses in the casino industry accounted for 83 per cent of employment, and 87 per cent of gross income.

CHART 4.1 INDUSTRY CONCENTRATION BY THE LARGEST EIGHT BUSINESSES, AUSTRALIA, 1991-92



**TABLE 4.1 CONCENTRATION STATISTICS, BY MAJOR DATA ITEMS,
AUSTRALIA, 1991-92**

<i>Businesses ranked by gross income</i>	<i>Businesses at end June 1992</i> No.	<i>Employment at end June 1992</i> No.	<i>Wages and salaries</i> \$m	<i>Gross income</i> \$m	<i>Operating profit/loss before tax</i> \$m
Accommodation (ANZSIC 5710)					
Largest four	4	6,621	151.4	517.7	-104.4
Second four	4	2,504	61.2	196.2	7.6
Third four	4	2,467	62.6	155.2	-70.7
Fourth four	4	2,284	49.2	132.9	2.9
Fifth four	4	1,786	42.1	108.1	-42.7
Remainder	4,294	58,474	838.4	2,871.6	-111.8
Total	4,314	74,136	1,204.9	3,981.7	-319.2
Pubs, bars and taverns (ANZSIC 5720)					
Largest four	4	4,426	70.1	574.3	40.5
Second four	4	1,253	19.0	101.4	-0.5
Third four	4	486	8.2	65.3	-2.2
Fourth four	4	711	6.9	53.0	1.1
Fifth four	4	395	5.3	47.8	1.6
Remainder	4,327	66,255	819.2	5,069.8	57.5
Total	4,347	73,526	928.6	5,911.6	97.9
Cafes and restaurants (ANZSIC 5730)					
Largest four	4	17,192	217.4	692.6	35.9
Second four	4	3,891	50.4	145.3	1.6
Third four	4	2,657	45.3	112.8	0.6
Fourth four	4	1,480	26.1	83.1	-0.8
Fifth four	4	1,566	16.2	63.0	4.7
Remainder	8,721	93,966	891.4	3,559.5	105.9
Total	8,741	120,752	1,246.8	4,656.4	147.9
Licensed clubs (ANZSIC 5740)					
Largest four	4	2,161	44.0	158.4	10.4
Second four	4	1,269	22.8	87.2	6.1
Third four	4	984	18.3	80.7	12.1
Fourth four	4	1,014	20.5	68.4	4.1
Fifth four	4	932	15.4	63.0	2.7
Remainder	3,791	54,064	891.4	3,352.9	142.9
Total	3,811	60,424	1,012.4	3,810.5	176.2
Casinos (ANZSIC 9322)					
Largest four	4	7,659	194.1	714.3	108.8
Second four	4	1,559	41.1	103.5	-9.8
Total	8	9,218	235.2	817.8	99.0

**TABLE 4.2 MAJOR DATA ITEMS BY EMPLOYMENT SIZE GROUPINGS
BY INDUSTRY, AUSTRALIA, 1991-92**

<i>Employment size groupings</i>	<i>Businesses at end June No.</i>	<i>Employment at end June 1992 No.</i>	<i>Wages and salaries \$m</i>	<i>Gross income \$m</i>
Accommodation (ANZSIC 5710)				
0-9 persons	3,111	14,318	131.1	736.7
10-19 persons	621	8,380	98.0	409.9
20-49 persons	383	11,157	157.9	537.0
50-99 persons	94	6,312	104.6	316.5
100 or more persons	105	33,969	713.3	1,981.7
Total	4,314	74,136	1,205.0	3,981.7
Pubs, bars and taverns (ANZSIC 5720)				
0-9 persons	2,182	12,457	131.7	1,093.6
10-19 persons	1,154	16,658	210.3	1,239.3
20-49 persons	822	25,111	330.2	1,964.0
50-99 persons	164	11,012	139.8	789.7
100 or more persons	25	8,289	116.6	825.0
Total	4,347	73,526	928.6	5,911.6
Cafes and restaurants (ANZSIC 5730)				
0-9 persons	5,573	29,817	218.1	1,148.8
10-19 persons	2,309	30,964	271.8	1,085.4
20-49 persons	686	18,545	222.6	732.4
50-99 persons	107	6,996	83.8	295.3
100 or more persons	67	34,429	450.5	1,394.5
Total	8,741	120,752	1,246.8	4,656.4
Licensed clubs (ANZSIC 5740)				
0-9 persons	2,268	9,567	134.0	593.0
10-19 persons	784	10,681	166.9	605.8
20-49 persons	534	14,806	251.8	859.4
50-99 persons	139	9,493	168.4	654.3
100 or more persons	87	15,876	291.3	1,098.1
Total	3,811	60,424	1,012.4	3,810.5
Casinos (ANZSIC 9322)				
100 or more persons	8	9,218	235.1	817.8
Total	8	9,218	235.1	817.8
Total hospitality industries				
0-9 persons	13,133	66,159	614.9	3,572.1
10-19 persons	4,868	66,683	747.0	3,340.5
20-49 persons	2,425	69,620	962.4	4,092.7
50-99 persons	503	33,813	496.8	2,055.8
100 or more persons	292	101,782	1,806.8	6,117.0
Total	21,221	338,057	4,628.0	19,178.0

Employment size classifications

The employment size classification presented in Table 4.2 is based on total employment (including both employees and working proprietors and partners).

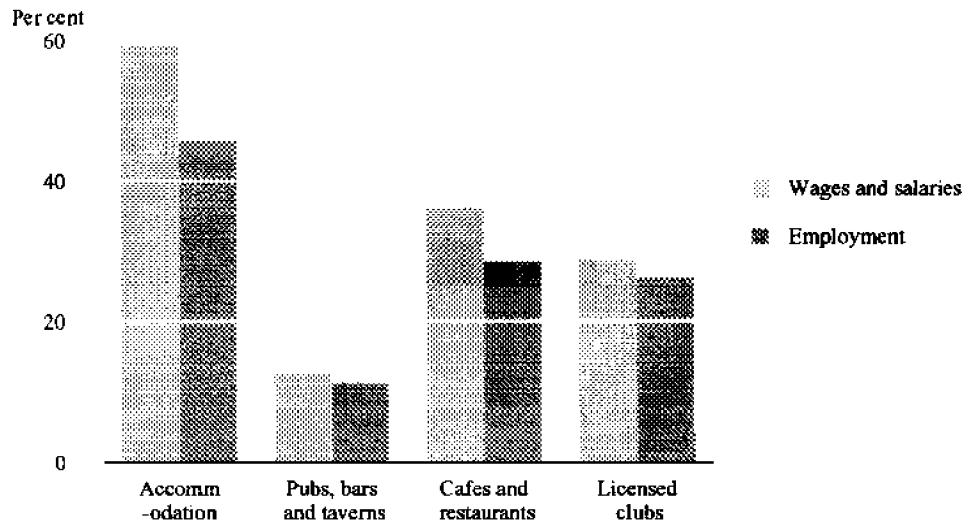
Small businesses

Small businesses (those with employment of less than 20 persons) were predominant in the hospitality industries (77 per cent of pubs, bars and taverns and 90 per cent of cafes and restaurants were small businesses).

Large businesses

Only 292 businesses in the hospitality industries were large businesses (those with employment of 100 or more persons). These 1 per cent of businesses were responsible for 30 per cent of employment and 32 per cent of gross income.

CHART 4.2 PERCENTAGE OF WAGES AND SALARIES AND TOTAL EMPLOYMENT ATTRIBUTED TO LARGE BUSINESSES, AUSTRALIA, 1991-92



More information?

More detailed information is available cross-classified by employment and gross income size groupings. Size groupings based on other data items such as high RSE sales of goods and services, can be tailored to meet user needs if requested.

SECTION 5 EMPLOYMENT

Male and female employment

Females comprise about 55 per cent of employment in the hospitality industries. The cafes and restaurant industry had the highest total female employment and the highest part-time female employment.

Part-time employment

The proportion of people employed in the hospitality industries on a part-time basis was 56 per cent. There were significant differences among industries (including casinos) with the cafes and restaurant industry having the highest total part-time employment.

Employment in the hospitality industries

Employment in the hospitality industries as a percentage of total Australian employment represented 4.3 per cent in 1991-92.

The growth of employment in the hospitality industries (excluding casinos) between 1986-87 and 1991-92 was 22 per cent, well above the growth rate of total Australian employment (9.3 per cent).

CHART 5.1 INDUSTRY PERCENTAGE OF FULL-TIME AND PART-TIME EMPLOYMENT, AUSTRALIA, 1991-92

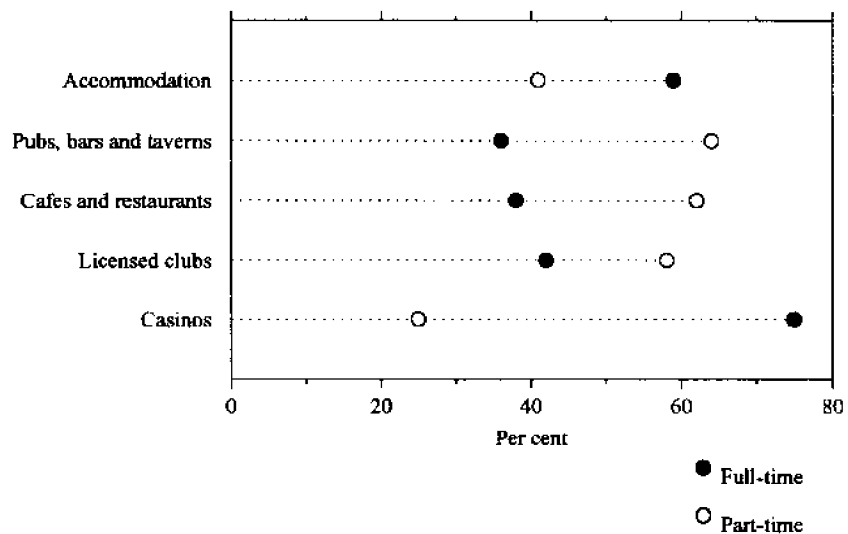


TABLE 5.1 FULL-TIME AND PART-TIME EMPLOYMENT BY SEX BY INDUSTRY, AUSTRALIA, 1979-80, 1986-87 AND 1991-92

<i>Employment type</i>	<i>1979-80 No.</i>	<i>1986-87 No.</i>	<i>1991-92 No.</i>
Accommodation (ANZSIC 5710)			
Males			
Full-time	n.a.	15,089	21,620
Part-time	n.a.	6,265	8,900
Total	14,000	21,354	30,519
Females			
Full-time	n.a.	15,492	22,146
Part-time	n.a.	17,566	21,470
Total	24,620	33,058	43,617
Total employment	38,620	54,412	74,136
Pubs, bars and taverns (ANZSIC 5720)			
Males			
Full-time	n.a.	17,084	15,813
Part-time	n.a.	18,582	18,693
Total	32,996	35,666	34,505
Females			
Full-time	n.a.	13,945	10,593
Part-time	n.a.	29,814	28,428
Total	44,231	43,759	39,021
Total employment	77,227	79,425	73,526
Cafes and restaurants (ANZSIC 5730)			
Males			
Full-time	n.a.	21,468	25,922
Part-time	n.a.	16,039	26,447
Total	24,554	37,507	52,370
Females			
Full-time	n.a.	15,211	20,478
Part-time	n.a.	31,689	47,904
Total	35,148	46,894	68,382
Total employment	59,702	84,401	120,752
Licensed clubs (ANZSIC 5740)			
Males			
Full-time	n.a.	15,144	16,955
Part-time	n.a.	12,747	14,700
Total	30,343	27,891	31,655
Females			
Full-time	n.a.	5,960	8,382
Part-time	n.a.	18,485	20,387
Total	22,029	24,445	28,769
Total employment	52,372	52,336	60,424
Casinos (ANZSIC 9322)			
Males			
Full-time	n.a.	n.a.	3,706
Part-time	n.a.	n.a.	1,015
Total	n.a.	n.a.	4,721
Females			
Full-time	n.a.	n.a.	3,202
Part-time	n.a.	n.a.	1,295
Total	n.a.	n.a.	4,497
Total employment	n.a.	n.a.	9,218

**TABLE 5.1 FULL-TIME AND PART-TIME EMPLOYMENT BY SEX BY INDUSTRY,
AUSTRALIA, 1979-80, 1986-87 AND 1991-92 - continued**

<i>Employment type</i>	<i>1979-80 No.</i>	<i>1986-87 No.</i>	<i>1991-92 No.</i>
Total hospitality industries			
Males			
Full-time	n.a.	68,785	84,015
Part-time	n.a.	53,633	69,755
Total	101,893	122,418	153,770
Females			
Full-time	n.a.	50,608	64,802
Part-time	n.a.	97,548	119,484
Total	126,028	148,156	184,286
Total employment	227,921	270,574	338,056

SECTION 6 INCOME

TABLE 6.1 MAJOR INCOME ITEMS BY INDUSTRY, AUSTRALIA,
1986-87 AND 1991-92

<i>Income item</i>	<i>1986-87 \$m</i>	<i>Percentage of gross income</i>	<i>1991-92 \$m</i>	<i>Percentage of gross income</i>
Accommodation (ANZSIC 5710)				
Meals and alcohol	671.4	30.6	1,144.8	28.8
Takings from accommodation	1,343.3	61.2	2,336.5	58.7
Takings from gambling	(a)n.a.	n.a.	1.6	0.0
Other	(b)178.9	8.2	498.9	12.5
Gross income	2,193.6	100.0	3,981.7	100.0
Pubs, bars and taverns (ANZSIC 5720)				
Meals and alcohol	4,224.4	90.2	5,209.6	88.1
Takings from accommodation	163.8	3.5	133.5	2.3
Takings from gambling	(a)n.a.	n.a.	181.8	3.1
Other	(b)295.6	6.3	386.7	6.5
Gross income	4,683.8	100.0	5,911.6	100.0
Cafes and restaurants (ANZSIC 5730)				
Meals and alcohol	2,358.6	93.0	4,335.3	93.1
Takings from accommodation	59.8	2.4	70.3	1.5
Takings from gambling	(a)n.a.	n.a.	2.1	0.0
Other	(b)115.3	4.6	248.7	5.3
Gross income	2,533.7	100.0	4,656.4	100.0
Licensed clubs (ANZSIC 5740)				
Meals and alcohol	1,302.4	48.9	1,710.2	44.9
Takings from accommodation	11.0	0.4	19.2	0.5
Takings from gambling	(a)903.8	33.9	1,441.9	37.8
Other	(b)445.7	16.8	639.2	16.8
Gross income	2,662.9	100.0	3,810.5	100.0
Casinos (ANZSIC 9322)				
Meals and alcohol	n.a.	n.a.	142.9	17.5
Takings from accommodation	n.a.	n.a.	65.3	8.0
Takings from gambling	n.a.	n.a.	558.1	68.2
Other	n.a.	n.a.	51.4	6.3
Gross income	n.a.	n.a.	817.8	100.0
Total hospitality industries				
Meals and alcohol	8,556.8	70.8	12,542.8	65.4
Takings from accommodation	1,577.9	13.1	2,624.8	13.7
Takings from gambling	(a)903.8	7.5	2,185.6	11.4
Other	(b)1,035.5	8.6	1,824.9	9.5
Gross income	(c)12,074.0	100.0	19,178.0	100.0

(a) In 1986-87 income from gambling was collected for the licensed clubs industry only. (b) In 1986-87 for all of the hospitality industries, dividends and income from sale of fixed assets were not collected. (c) 1986-87 data does not include casinos.

Industry comparisons

For the hospitality industries, the largest source of income was takings from meals and alcohol. The accommodation industry accounted for 89 per cent of the total takings from accommodation for the hospitality industries.

The eight casinos received 26 per cent of total takings from gambling, whilst licensed clubs received 66 per cent of total takings from gambling for the hospitality industry.

Takings per business

Comparing takings per business, casinos were clearly the largest businesses grossing \$102.2 million per business.

Cafes and restaurants had the lowest takings per business (\$533,000). There were over twice as many businesses in this industry compared with the other hospitality industries.

TABLE 6.2 TAKINGS PER BUSINESS BY INDUSTRY, AUSTRALIA, 1991-92

<i>Industry</i>	<i>Businesses</i>	<i>Meals</i>	<i>Takings</i>	<i>Takings</i>	<i>Other</i>	<i>Gross</i>
	<i>at end June</i>	<i>and</i>	<i>from</i>	<i>from</i>		
	No.	alcohol	accommodation	gambling	income	income
		\$'000	\$'000	\$'000	\$'000	\$'000
Accommodation	4,314	265.4	541.6	0.37	116.0	923.0
Pubs, bars, and taverns	4,347	1,198.4	30.7	41.8	89.0	1,360.0
Cafes and restaurants	8,741	496.0	8.0	0.24	28.4	533.0
Licensed clubs	3,811	449.0	5.0	378.4	168.0	1,000.0
Casinos	8	17,863.0	8,163.0	69,763.0	6,425.0	102,225.0
Total	21,221	591.1	123.7	103.0	86.0	903.7

Takings per capita

Almost \$1,000 per head of population was spent in the hospitality industries in Australia during 1991-92. The pubs, bars and taverns industry had the highest takings per head of population (\$318).

Meals and alcohol were the largest income items with takings of \$721 per head of population. Licensed clubs accounted for 66 per cent of takings from gambling (\$83 per head of population).

TABLE 6.3 TAKINGS PER HEAD OF POPULATION BY INDUSTRY, AUSTRALIA, 1991-92

<i>Industry</i>	<i>Businesses</i>	<i>Meals</i>	<i>Takings</i>	<i>Takings</i>	<i>Total</i>
		<i>and</i>	<i>from</i>	<i>from</i>	
	<i>at end June</i>	alcohol	accommodation	gambling	
		\$	\$	\$	\$
Accommodation	4,314	65.83	134.35	0.09	200.27
Pubs, bars, and taverns	4,347	299.56	7.68	10.45	317.69
Cafes and restaurants	8,741	249.29	4.04	0.12	253.45
Licensed clubs	3,811	98.34	1.10	82.91	182.35
Casinos	8	8.22	3.75	32.09	44.06
Total	21,221	721.24	150.92	125.66	997.82

Based on mean population figures, year ended 30 June 1992.

More information?

Income data analysis using the mean, median, mode, and deciles, is available on request. This information is also available by business size groupings.

SECTION 7 EXPENSES

TABLE 7.1 MAJOR EXPENSE ITEMS BY INDUSTRY, AUSTRALIA,
1986-87 AND 1991-92

Type of expense	1986-87 \$m	1991-92 \$m	Percentage change
Accommodation (ANZSIC 5710)			
Total labour expenses	663.5	1,263.8	90.5
Total rent, leasing and hiring expenses of vehicles and equipment	32.5	31.6	-2.8
Total occupancy expenses	199.7	365.9	83.2
Total entertainment expenses	(a)8.0	13.9	73.8
<i>Other expenses</i>			
Cost of goods sold	303.3	533.8	76.0
Other operating expenses	(b)695.8	1,541.9	121.6
Total operating expenses	1,902.8	3,751.0	97.1
Total non-operating expenses	188.1	549.9	192.3
Total expenses	2,090.9	4,300.9	105.7
Pubs, bars and taverns (ANZSIC 5720)			
Total labour expenses	795.4	967.4	21.6
Total rent, leasing and hiring expenses of vehicles and equipment	41.3	45.8	10.9
Total occupancy expenses	234.4	301.2	28.5
Total entertainment expenses	(a)64.9	134.8	107.7
<i>Other expenses</i>			
Cost of goods sold	2,398.4	2,885.6	20.3
Other operating expenses	(b)758.1	1,149.3	51.6
Total operating expenses	4,292.5	5,484.3	27.8
Total non-operating expenses	169.2	329.4	94.7
Total expenses	4,461.7	5,813.7	30.3
Cafes and restaurants (ANZSIC 5730)			
Total labour expenses	670.5	1,293.7	92.9
Total rent, leasing and hiring expenses of vehicles and equipment	40.9	42.5	3.9
Total occupancy expenses	196.1	388.4	98.0
Total entertainment expenses	(d)n.a.	15.5	n.a.
<i>Other expenses</i>			
Cost of goods sold	967.8	1,702.2	75.9
Other operating expenses	(b)441.9	914.1	106.9
Total operating expenses	2,317.2	4,356.4	88.0
Total non-operating expenses	64.3	152.2	136.7
Total expenses	2,381.5	4,508.6	89.3

**TABLE 7.1 MAJOR EXPENSE ITEMS BY INDUSTRY, AUSTRALIA,
1986-87 AND 1991-92 - continued**

<i>Type of expense</i>	<i>1986-87 \$m</i>	<i>1991-92 \$m</i>	<i>Percentage change</i>
Licensed clubs (ANZSIC 5740)			
Total labour expenses	713.7	1,061.5	48.7
Total rent, leasing and hiring expenses of vehicles and equipment	9.0	7.0	-22.2
Total occupancy expenses	55.2	111.1	101.3
Total entertainment expenses	(a)63.9	377.7	491.0
<i>Other expenses</i>			
Cost of goods sold	701.8	860.4	22.6
Other operating expenses	(b)846.5	1,138.8	34.5
Total operating expenses	2,390.1	3,556.6	48.8
Total non-operating expenses	48.0	75.7	57.7
Total expenses	2,438.1	3,632.3	49.0
Casinos (ANZSIC 9322)			
Total labour expenses	n.a.	244.8	..
Total rent, leasing and hiring expenses of vehicles and equipment	n.a.	1.3	..
Total occupancy expenses	n.a.	51.2	..
Total entertainment expenses	n.a.	107.3	..
<i>Other expenses</i>			
Cost of goods sold	n.a.	46.0	..
Other operating expenses	n.a.	240.1	..
Total operating expenses	n.a.	690.7	..
Total non-operating expenses	n.a.	28.1	..
Total expenses	n.a.	718.8	..
Total hospitality industries			
Total labour expenses	2,843.1	4,831.2	..
Total rent, leasing and hiring expenses of vehicles and equipment	123.7	128.3	..
Total occupancy expenses	685.4	1,217.9	..
Total entertainment expenses	(a)(d)136.8	649.2	..
<i>Other expenses</i>			
Cost of goods sold	4,371.3	6,028.1	..
Other operating expenses	2,742.3	4,984.3	..
Total operating expenses	10,902.6	17,839.0	..
Total non-operating expenses	496.6	1,135.3	..
Total expenses	(c)11,399.2	18,974.3	..

(a) In 1986-87 no comparable figures were available for gambling taxes and levies. (b) In 1986-87 credit card commissions was not included. (c) 1986-87 data does not include casinos. (d) Entertainment expenses were not collected for the Cafes and restaurants industry in 1986-87.

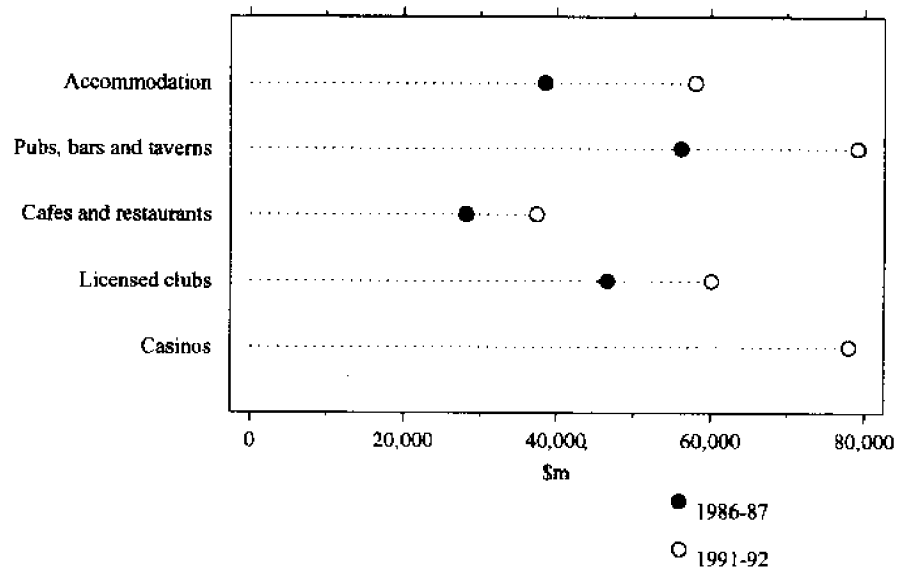
Percentage contributions of expenses components

The cost of goods sold was the largest single component of expenses in the hospitality industries. Its contribution to total expenses was 32 per cent.

Labour expenses

The cafes and restaurants industry had the largest labour expenses and the largest employment.

CHART 7.1 TOTAL EXPENSES PER WORKING PERSON
BY INDUSTRY, AUSTRALIA, 1986-87 AND 1991-92



Rent, lease and hiring expenses

The casino and licensed club industries spent relatively little on rent leasing and hiring expenses compared to the other industries. The largest amount was spent by the pubs, bars and taverns industry.

Occupancy expenses

Accommodation, and cafes and restaurants, had the highest proportions of occupancy expenses compared with all other industries, 8.5 and 8.6 per cent respectively.

Total entertainment expenses

Of all the hospitality industries, licensed clubs incurred the greatest entertainment costs, followed by pubs, bars and taverns. On average, each licensed club spent \$99,108 on entertainment, and for the pubs bars and taverns industry, \$31,010.

TABLE 7.2 TOTAL EXPENSES AND GROSS INCOME PER BUSINESS BY INDUSTRY, AUSTRALIA, 1986-87 AND 1991-92

Industry	Total expenses			Gross income		
	1986-87	1991-92	Percentage change	1986-87	1991-92	Percentage change
	\$'000	\$'000	%	\$'000	\$'000	%
Accommodation	546.5	997.0	82.4	573.3	923.0	61.0
Pubs, bars and taverns	948.5	1,337.4	41.0	995.7	1,360.0	36.6
Cafes and restaurants	311.5	515.8	65.6	331.4	532.7	60.7
Licensed clubs	677.1	953.1	40.8	739.5	999.9	35.2
Casinos	n.a.	89,850.0	..	n.a.	102,225.0	..

More information?

Expenses data analysis using mean, median, mode, and deciles is available. This information is also available by business size groupings.

SECTION 8 LIVE ENTERTAINMENT

Overview

Of the 21,221 businesses in the hospitality industries in 1991-92, 25 per cent provided live entertainment for their guests. These live entertainers included both musicians and non-musicians, and were paid \$190m for some 394,000 performances.

The provision of live entertainment was concentrated in two industries;

- the licensed clubs industry where 49 per cent of businesses provided live entertainment, and
- the pubs, bars and taverns industry where 46 per cent of businesses provided live entertainment.

Only 12 per cent of cafes and restaurants and 8 per cent of accommodation businesses provided live entertainment.

Casinos

There were 8 casinos in Australia in 1991-92, and all of these provided live entertainment. Casinos had both the highest number of performances per business compared with the other hospitality industries (with over 900 each) and paid the most (nearly \$850 on average) for each performance.

TABLE 8.1 INCIDENCE AND COST OF LIVE ENTERTAINMENT FOR THE HOSPITALITY INDUSTRIES, AUSTRALIA 1991-92

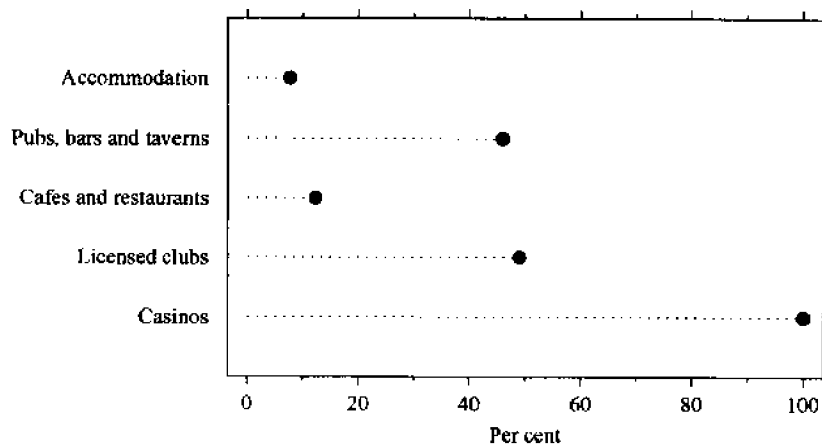
<i>Industry</i>	<i>Businesses at end of June 1992 No.</i>	<i>Businesses with live entertainment No.</i>	<i>Number of performances No.</i>	<i>Payments to performers \$'000</i>
Accommodation	4,314	332	46,198	13,506
Pubs, bars and taverns	4,347	2,002	164,950	83,494
Cafes and restaurants	8,741	1,075	60,425	14,932
Licensed clubs	3,811	1,867	115,715	72,454
Casinos	8	8	7,251	6,143
Total	21,221	5,284	394,540	190,529

Numbers of performances

The pubs, bars and taverns industry provided the largest number of live performances. Of the 394,000 performances during 1991-92, 42 per cent were in pubs, bars and taverns and 29 per cent were in licensed clubs.

For those businesses which provided live entertainment, the number of performances ranged from 56 for each business in the cafes and restaurants industry to over 900 in each of the casinos. Although only 8 per cent of accommodation businesses provided live entertainment, each business had 139 performances. This compared with 62 performances per business in licensed clubs and 82 performances per business in pubs, bars and taverns.

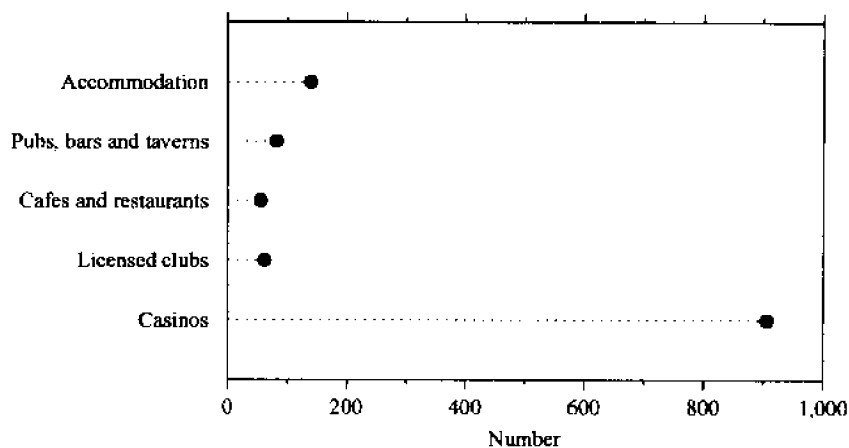
CHART 8.1 PROPORTION OF BUSINESSES PROVIDING LIVE ENTERTAINMENT BY INDUSTRY, AUSTRALIA, 1991-92



Payments for live entertainment

The amount paid for live entertainment ranged from under \$250 per performance in the cafes and restaurants industry to almost \$850 per performance in the casinos industry. The average paid was \$480.

CHART 8.2 NUMBER OF PERFORMANCES PER BUSINESS FOR THOSE WITH LIVE ENTERTAINMENT BY INDUSTRY, AUSTRALIA, 1991-92



More information?

Breakdowns of the number of live performances and payments by musicians/non-musicians and Australian resident/overseas performers are available upon request.

SECTION 9 ACCOMMODATION

TABLE 9.1 MAJOR DATA ITEMS BY TYPE OF ACCOMMODATION, AUSTRALIA, 1991-92

Type of accommodation	Establishments	Employment	Wages	Selected income
	at end of June 1992 No.	at end of June 1992 No.	and salaries \$m	
Licensed hotel with facilities	836	35,209	622.1	2,003.9
Licensed hotel without facilities	44	1,087	*15.1	*69.8
Resort	410	26,514	544.7	1,578.5
Motels with facilities	1,797	15,764	172.7	668.7
Guest house/bed and breakfast with facilities	57	608	8.0	31.6
Guest house/bed and breakfast without facilities	150	1,431	13.8	48.7
Private hotel with facilities	96	614	6.9	32.1
Private hotel without facilities	149	604	6.3	40.2
Self catering establishment	293	1,605	16.5	83.0
Visitor hostel	283	1,305	12.7	59.1
Caravan park	604	3,105	34.8	174.6
Long term accommodation	263	2,702	41.5	118.5
Other accommodation	112	978	13.5	51.2
Total	5,093	91,526	1,508.5	4,960.0

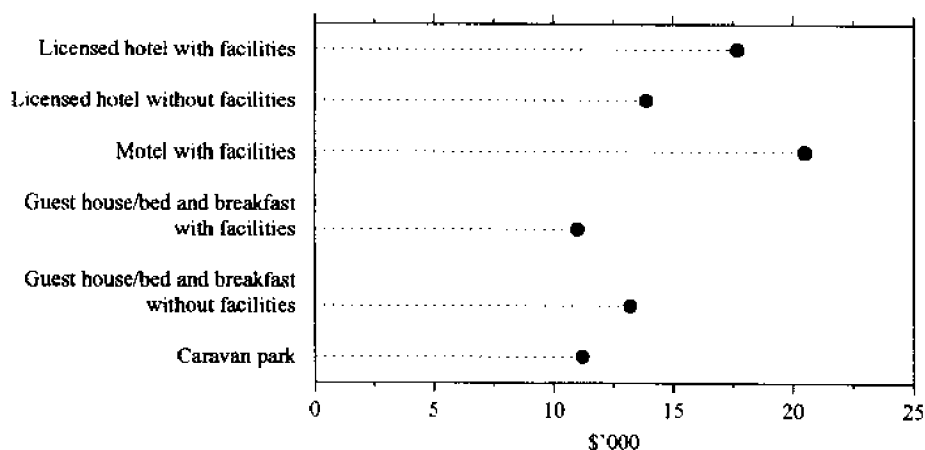
Establishment level data

Statistics in Table 9.1 relate to accommodation establishments rather than accommodation businesses. Consequently, data in this table differs from data for the accommodation industry in other tables, as some accommodation establishments are operated by businesses classified to other industries such as Pubs, bars and taverns and Cafes and restaurants, and some accommodation businesses have more than one establishment.

Of the 5,093 accommodation establishments, 35 per cent were motels with facilities, which employed 17 per cent of persons in the accommodation industry.

Licensed hotels with facilities were the predominant accommodation type with regard to employment (38 per cent), wages and salaries, (41 per cent), and selected income (40 per cent).

CHART 9.1 WAGES AND SALARIES PER EMPLOYEE BY TYPE OF ACCOMMODATION, AUSTRALIA, 1991-92



**TABLE 9.2 GROSS INCOME FROM CONVENTIONS FOR THE
ACCOMMODATION INDUSTRY, AUSTRALIA, 1991-92**

	<i>Unit</i>	<i>1991-92</i>
Number of businesses at end of June 1992	No.	4,314
Gross income for the accommodation industry	\$m	3,981.7
Number of businesses providing convention facilities at end June 1992	No.	903
Gross income of businesses providing convention facilities	\$m	2,588.2
Income from the provision of convention facilities(a)	\$m	301.5

(a) Includes income from accommodation, food, beverages, other retail sales, gambling and rent, leasing and hiring of rooms and equipment.

Gross income

Of the 4,314 accommodation businesses only 21 per cent offered convention facilities. For those businesses providing convention facilities, 12 per cent of their total income was derived due to their convention facilities.

SECTION 10 LICENSED CLUBS: ACCESS FACILITIES FOR PEOPLE WITH DISABILITIES

Types of access

Licensed clubs were surveyed concerning the provision of access for people with disabilities. Three types of access were included:

- level, ramp, or lift access into and through the club premises;
- doors at least 760mm wide; and
- a toilet that complied with AS 1428 and had grab-rails and space to manoeuvre a wheelchair.

A club was considered to provide access if it had one or more of the above facilities.

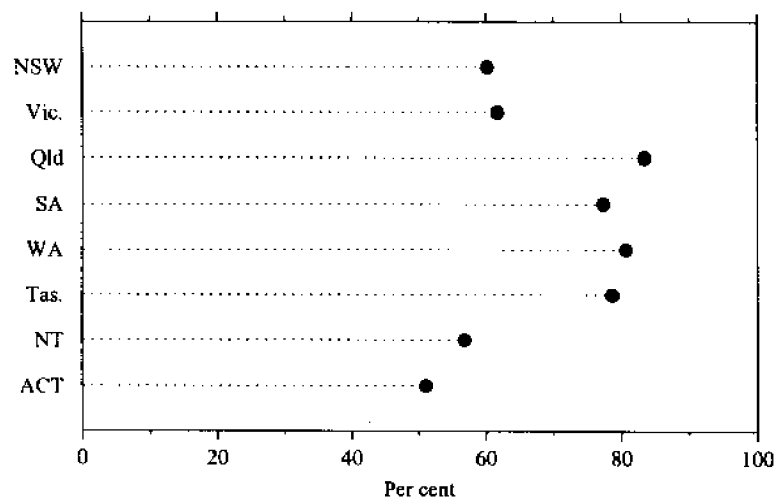
**TABLE 10.1 NUMBER OF LICENSED CLUBS WITH ACCESS FOR PERSONS WITH DISABILITIES
BY STATE, 1991-92**

<i>Type of club</i>	<i>NSW</i>	<i>Vic.</i>	<i>Qld</i>	<i>SA</i>	<i>WA</i>	<i>Tas.</i>	<i>NT</i>	<i>ACT</i>	<i>Aust.</i>
	No.								
With facilities	929	316	608	309	284	129	25	34	2,634
Without facilities	615	196	120	90	68	35	20	33	1,177
Total	1,544	512	728	399	352	164	44	67	3,811

State comparison

Almost 70 per cent of all licensed clubs in Australia provided facilities for the disabled. Queensland had the largest proportion, offering disabled access in 84 per cent of clubs. By contrast, the Australian Capital Territory had the lowest proportion, with just over half of all licensed clubs providing facilities for disabled persons.

**CHART 10.1 PERCENTAGE OF LICENSED CLUBS WITH ACCESS
FOR PERSONS WITH DISABILITIES, BY STATE, 1991-92**



More information?

More detailed information such as type of access by type of club is available upon request.

TECHNICAL NOTES

Survey scope and methodology

1. This publication contains data derived from a survey of the hospitality industries for 1991-92, and some comparative statistics relating to preceding years.

2. The survey excluded businesses which did not have employees at the time the survey population was selected. Non-employing businesses contribute a relatively small proportion of the total economic activity and their exclusion from the survey would not have a significant impact on the published data.

3. The survey was conducted by mail with full enumeration of the larger businesses and a sample of the smaller businesses.

Classification by industry

4. The survey included the four industries classified to Division H and Class 9233, Casinos, of the 1993 edition of the Australian and New Zealand Standard Industrial Classification (ANZSIC). Division (H) includes all units mainly engaged in providing hospitality services in the form of accommodation, meals and drinks and includes Accommodation; Cafes and Restaurants; Pubs, Taverns and Bars; and Licensed Clubs industry classes.

5. The survey, however, was developed and conducted using businesses selected on the basis of their classification using the 1983 edition of the Australian Standard Industry Classification (ASIC). For the cafes and restaurants, pubs, bars and taverns and accommodation industries there were no differences between the ANZSIC and ASIC classifications.

6. For clubs, however, there were differences between the ANZSIC and ASIC classifications. The ANZSIC Class 5740 Clubs is the aggregation of four ASIC Classes:

. ASIC Class 9241	Licensed bowling clubs
. ASIC Class 9242	Licensed golf clubs
. ASIC Class 9243	Licensed clubs n.e.c.
. ASIC Class 9244	Non-licensed clubs n.e.c.

This survey did not include ASIC Class 9244 Non-licensed clubs n.e.c., so the data provide only partial coverage of ANZSIC Class 5740.

ASIC Class 9143 includes casinos and several other types of gambling operations such as betting shop operation and bookmakers. The survey population, however, was limited to casinos, so the data provide only partial coverage of ASIC Class 9143. ANZSIC Class 9322 is limited to the operation of casinos: the survey population provides full coverage of this industry class.

Statistical unit

7. The unit for which statistics were reported in the survey was the *management unit*. The management unit is the highest-level accounting unit within a business, having regard for industry homogeneity, for which accounts are maintained; in nearly all cases it coincides with the legal entity owning the business (ie company, partnership trust, sole operator, etc). In the case of large diversified businesses, however, there may be more than one management unit, each coinciding with a 'division' or 'line of business'. A division or line of business is recognised where separate and comprehensive accounts are compiled for it.

8. Many businesses also operate as franchises to these management units. In this situation both the franchisee and franchisor businesses are included as separate businesses in these statistics.

State data

9. Data were collected from the Australia-wide operations of each business. Businesses which operated in more than one state were asked to provide a dissection of gross income, employment, and wages and salaries, to enable state statistics to be compiled.

Reference period

10. Data contained in the tables of this publication relate to all businesses which operated in Australia at any time during the year ended 30 June 1992. Counts of businesses include only those businesses that were operating at 30 June 1992 unless otherwise specified.

Businesses ceased during the year

11. A very small number of businesses ceased employing staff during the 1991-92 reference period, ie they became non-employing businesses. It is normal ABS procedure to include the contributions of these businesses in the survey output.

Comparability with previous statistics

12. The standard units definitions employed in the system of integrated economic statistics were revised in 1988-89. Prior to this period, the enterprise was the statistical unit for which data was collected.

Units definitions

13. However, for the majority of businesses prior to 1988-89, (particularly the smaller businesses), the management unit and enterprise are expected to be one and the same.

Collection methodology

14. The 1979-80 statistics were derived from a census, while the 1986-87 and 1991-92 statistics were derived from a full enumeration of the larger units and a sample of the smaller units.

Non-employing units

15. Both the 1979-80 Retail and Selected Service Industries Census and the 1986-87 Service Industries Survey included non-employing units. To enable closer comparability with the 1991-92 survey, the contribution made by the non-employing units to the data in these previous two collections has been removed. (Refer to paragraph 2 for information regarding the treatment of non-employing businesses in the 1991-92 survey).

Businesses with turnover less than \$50,000

16. The scope of the 1979-80 retail census excluded single establishment businesses with turnover less than \$50,000 per year for the cafes and restaurants and licensed clubs industries only. These businesses, however, did not make a significant contribution to statistical aggregates. For example, although cafes and restaurants with turnover of less than \$50,000 per year represented 27 per cent of the population, they contributed only 5 per cent to turnover. This contribution was reduced further with the exclusion of non-employing units.

Industry classification

17. The 1979-80 Retail and Selected Service Industries Census used the 1978 ASIC; the 1986-87 Service Industries Survey used the 1983 ASIC; and the 1991-92 Service Industries Survey used the 1993 ANZSIC. The 1978 and 1983 industry classifications were unchanged for the industries included in this publication. Changes that were implemented in the 1993 ANZSIC have been outlined above in paragraph 6.

- Data item definitions** 18. Small changes to data item definitions occurred between the 1979-80, 1986-87 and 1991-92 collections. This was the result of different questions (often at a finer level of detail) being asked on the questionnaire for each survey.
- Takings per head of population** 19. Takings per head of population is calculated by dividing takings by the mean population (17,390,836) for 1991-92.
- Reliability of estimates** 20. The estimates presented in this publication are subject to both sampling and non-sampling error.
- Sampling errors** 21. Since the estimates in this publication are based on information obtained from a sample drawn from units in the surveyed population, the estimates are subject to sampling variability, that is, they may differ from figures that would have been obtained if all units had been included in the survey. One measure of the likely difference is given by the standard error, which indicates the extent to which an estimate might have varied by chance because only a sample of units was included.
22. There are about two chances in three that a sample estimate will differ by less than one standard error from the figure that would have been obtained if all units had been included in the survey, and approximately nineteen chances in twenty that the difference will be less than two standard errors.
23. *Sampling variability* can be measured by the relative standard error (RSE) which is obtained by expressing the standard error as a percentage of the estimate to which it refers. The RSE is a useful measure in that it provides an immediate indication of the percentage errors likely to have occurred due to sampling, and thus avoids the need to refer also to the size of the estimate.
24. The following table contains estimates of RSEs for a selection of statistics presented in this publication.

**TABLE 11.1 RELATIVE STANDARD ERRORS OF KEY ESTIMATES,
HOSPITALITY INDUSTRIES, AUSTRALIA, 1991-92**

<i>Item</i>	<i>1991-92 Per cent</i>
Businesses at end June 1992	1
Employment at end June 1992	1
Meals and alcohol income	2
Accommodation income	1
Gambling income	4
Other income	2
Gross income	1
Labour expenses	1
Occupancy expenses	2
Vehicle and equipment expenses	4
Entertainment expenses	4
Cost of goods sold expenses	2
Other expenses	2
Total operating expenses	1
Total non-operating expenses	3
Operating profit before tax	33
Industry gross product	1

25. As an example of the above, an estimate of the employment for the hospitality industry is 338,057 persons and the RSE is 1 per cent giving a standard error of 3,381 persons. Therefore, there would be two chances in three that, if all units had been included in the survey, a figure within the range of 334,676 persons to 341,437 persons would have been obtained, and nineteen chances in twenty that the figure would have been within the range of 331,431 persons to 344,683 persons (a confidence interval of 95 per cent).

26. Where the RSE of an estimate included in this publication exceeds 25 per cent, it has been annotated with an asterisk (*) as a warning to users.

Non-sampling error

27. Errors other than standard errors may occur because of deficiencies in the register of units from which the sample was selected, non-response and imperfections in reporting by respondents. Inaccuracies of this kind are referred to as non-sampling error and they may occur in any collection, whether it be a census or a sample. Every effort has been made to reduce non-sampling error to a minimum by careful design and testing of questionnaires, efficient operating procedures and systems used to compile the statistics.

GLOSSARY OF TERMS

Access facilities for people with disabilities	Are facilities licensed clubs provide specifically for the use of disabled people. Facilities include level, ramp or lift access into and through club premises, doors at least 760 mm wide and toilets that comply with AS1428 and have grab rails and space to manoeuvre a wheelchair.
Businesses at end June	Count of management units operating at the end of June.
Casual employees	Employees not entitled to take paid holidays.
Cost of goods sold	Is purchases of foodstuffs, liquor and goods for resale plus opening stocks minus closing stocks.
Earnings before interest and tax (EBIT)	A measure of profit prior to the deduction of interest expense and income tax.
Employment	Includes working proprietors, working partners, permanent, part-time, temporary and casual employees, and managerial and executive employees working for a business during the last pay period in June each year. Employees absent on paid or prepaid leave are included.
Entertainment expenses	Includes gambling taxes and levies, payment to Australian and overseas musicians, and performers.
Establishments	The establishment is the smallest type of accounting unit within a management unit.
Full-time employees	Employees who work 35 hours per week or more.
Gross Domestic Product	The total market value of goods and services produced in Australia after deducting the cost of goods and services used up in the process of production (intermediate consumption), but before deducting consumption of fixed capital.
Gross income	Sum of all income items, ie takings from accommodation, takings from meals, takings from takeaway food, sales of liquor, other retail sales, takings from gambling, interest income, dividends, royalties, net profit (or loss) on the sale of fixed tangible assets, net profit (or loss) on foreign exchange and 'other' income.
Industry gross product	Is sales of goods and services plus rent, leasing and hiring income, plus closing stocks minus opening stocks, minus purchases and other selected non-operating expenses, which comprises of: rent leasing and hiring expenses, 'other' expenses, liquor licence fees, credit card commissions, advertising and gambling taxes and levies.
Labour expenses	Include wages and salaries, employer contribution to superannuation funds and workers' compensation costs.

Live performance	Is entertainment provided by musicians (including singers) and non-musicians (eg comedians and drama groups).
Meals and alcohol income	Includes takings from meals, takeaway food and liquor.
Occupancy expenses	Includes rent, leasing and hiring of land, buildings, other structures and depreciation on buildings.
Other expenses	Includes expenses such as repairs and maintenance expenses, office supplies and printing costs, travelling expenses, telephone and postal charges, motor vehicle running expenses, credit card commissions and royalties expenses.
Other income	Includes all income not covered in meals and alcohol income, takings from gambling and accommodation eg commission from vending machines and video games, entertainment cover charges and net profit (or loss) on the sale of fixed tangible assets.
Operating profit before tax (OPBT)	A measure of profit before extraordinary items are brought to account and prior to the deduction of income tax and appropriations to owners (eg dividends paid).
Operating profit margin	The percentage of sales of goods and services available as operating profit, ie (operating profit before tax x 100)/sales of goods and services.
Payments to performers	Includes contract payments for provision of live entertainment and payments for accommodation and travel, but does not include advertising and promotion expenses nor wages of staff mainly involved in supporting live entertainment, such as door staff.
Part-time employees	Employees who work less than 35 hours per week.
Persons employed at 30 June 1992	Includes working proprietors and working partners of unincorporated businesses, working directors of incorporated companies and trusts, employees entitled to take paid holidays and casual employees who are not entitled to take paid holidays, working for a business during the last pay period ending in June 1992.
Purchases and selected expenses	Includes purchases of goods for resale and payments made for services provided by other businesses such as rent, leasing and hiring of land and buildings.
Rent, leasing and hiring expenses	Includes rent leasing and hiring of motor vehicles, plant, machinery and other equipment.
Selected income	Selected income for all industries is gross income minus interest income, dividends received and royalties. For the accommodation industry selected income also excludes other income.
Takings from accommodation	Is revenue received from the provision of accommodation. All takings from meals including the meals component where meals and accommodation are combined are excluded.

Takings from gambling	For casinos and accommodation establishments, takings from gambling is income from gambling (net of payouts to players). For cafes, restaurants, pubs, taverns and bars, takings from gambling is takings from poker machines. For licensed clubs, takings from gambling is takings from poker machines and keno. Takings from gambling does not include TAB concessions.
Total expenses	Sum of expense items ie wages and salaries, employer contributions to superannuation funds, workers' compensation costs, insurance premiums, cost of goods sold, liquor licence fees, interest expenses, depreciation on buildings, rent, leasing and hiring expenses, media advertising expenses, gambling taxes/levies, bad debts written off and other expenses.
Total non operating expenses	Includes, interest, royalties and bad debts expenses.
Total operating expenses	Total expenses minus total non-operating expenses.
Total operating income	Is the income derived from the sales of goods and services. It includes sales of food and alcohol, gambling, accommodation and rent, leasing and hiring income, membership fees and other operating income.
Trading profit	A measure of profit directly attributable to trading in goods and services. It is derived by subtracting the purchases and selected expenses (cost of sales) from the value of sales of goods and services (total operating income).
Wages and salaries	Are gross earnings of all employees before taxation and other deductions. Drawings of working proprietors and working partners of unincorporated businesses are excluded, except for licensed clubs.

SPECIAL DATA SERVICES

- The Service Industries Survey on the Hospitality industry, allows for a wider range of data to be made available than is contained in this publication. Two examples of standard products that can be made available on request are industry ratios and income and expense data analysis.
- Other statistical products can be tailored to satisfy the specific requirements of clients.
- For further information on unpublished statistics that can be made available, contact Dennis Robson, on Melbourne (03) 615 7634.

SYMBOLS AND OTHER ABBREVIATIONS

Symbols

The following symbols, where shown in columns of figures or elsewhere in tables mean:

—	nil or rounded to zero
..	not applicable
n.a.	not available
n.p.	not available for separate publication, but included in totals where applicable
*	subject to sampling variability too high for practical purposes (i.e. relative standard error greater than 25 per cent)

Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

Abbreviations

ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
ASIC	Australian Standard Industrial Classification
EBIT	Earnings before interest and tax
IGP	Industry Gross Product
OPBT	Operating profit before tax

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- . Casinos
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Publications :

Motor Vehicle Hire Australia, 1991-92 (Catalogue 8652.0)

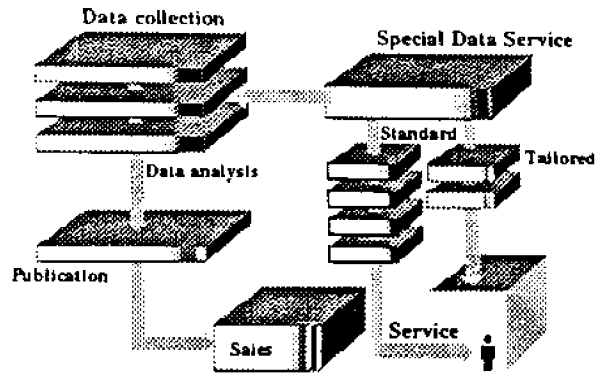
Amusement and Theme Parks, Australia , 1991-92 (Catalogue 8675.0)

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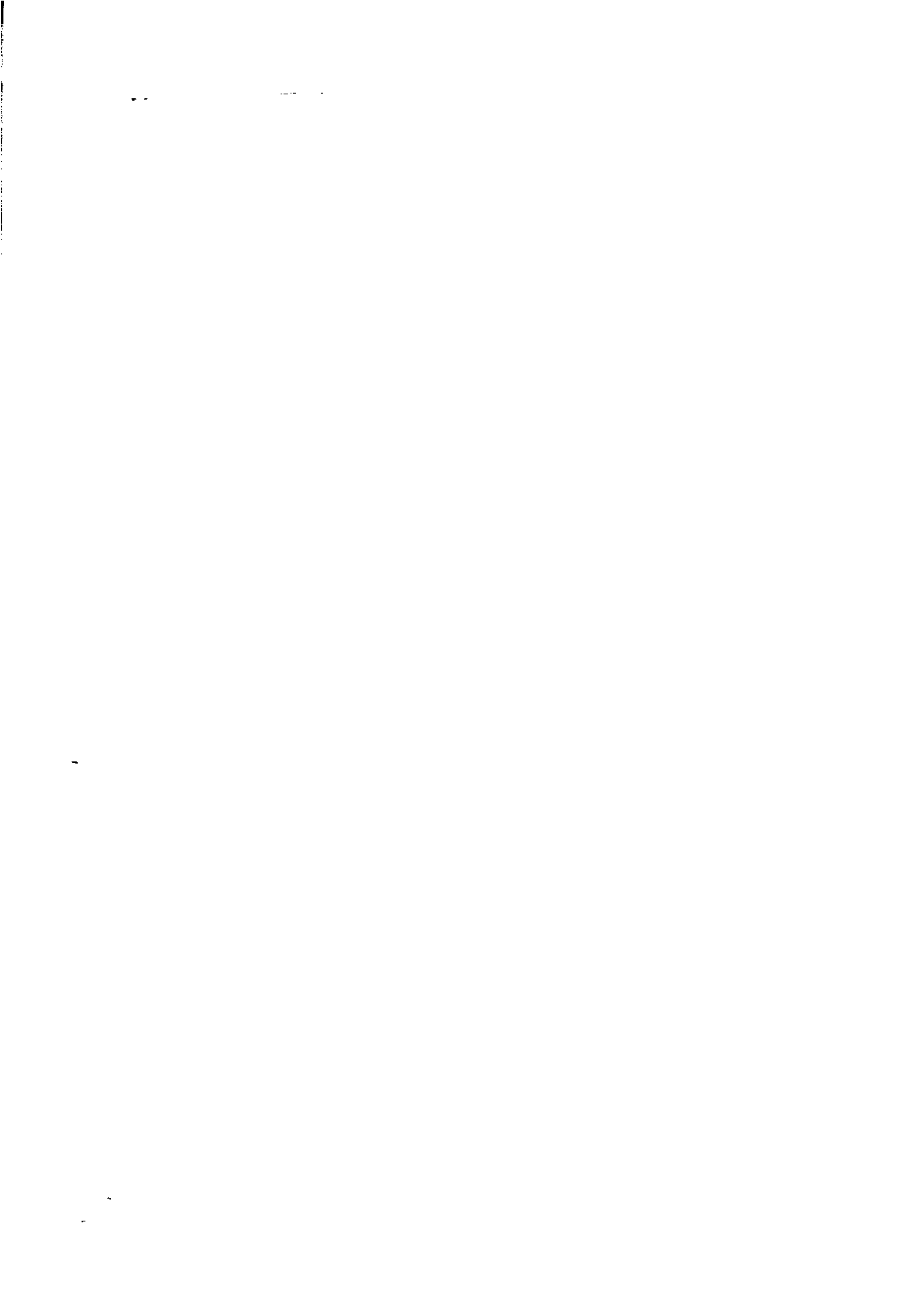
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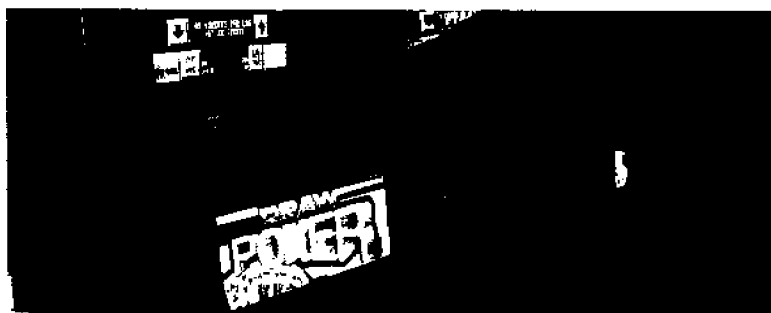


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