



Commercial Accommodation Monitor: October 2018

Marlborough

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Preface

Commercial Accommodation Monitor: October 2018 – Marlborough presents comprehensive and impartial information on short-term commercial accommodation for the Marlborough Regional Tourism Organisation (RTO) area, from the Accommodation Survey. This survey is run by Stats NZ on behalf of the Ministry of Business, Innovation & Employment.

The data relates to the areas covered by the following local authority:

- Marlborough District

Comparisons of monthly data with the same month of the previous year need to be treated with caution, as data for one period may be influenced by events for which there is no equivalent in the previous period (eg Chinese New Year, Easter).

For further data and commentary, see the monthly Accommodation Survey Hot Off the Press, and the monthly pivot tables – with variables by RTO and local authority area – both available on the Stats NZ website (www.stats.govt.nz).

The November 2018 monitor will be released on 28 January 2019.

Liz MacPherson
Government Statistician

Standards and further information

Percentage changes

Percentage movements are, in a number of cases, calculated using data of greater precision than that published. This could result in slight variations.

Rounding procedures

On occasion, figures are rounded to the nearest thousand or some other convenient unit. This may result in a total disagreeing slightly with the total of the individual items as shown in tables. Where figures are rounded the unit is in general expressed in words below the table headings, but where space does not allow this the unit may be shown as (000) for thousands, etc.

Source

All data is compiled by Stats NZ, except where otherwise stated. Both administrative and survey data has been used in this report.

Liability

While all care and diligence has been used in processing, analysing and extracting data and information in this report, Stats NZ gives no warranty it is error free and will not be liable for any loss or damage suffered as a result of the use, directly or indirectly, of information in this report.

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1 Highlights

Monthly highlights

In October 2018 compared with October 2017:

- Guest nights rose 0.7 percent to 54,194
- International guest nights fell 6.7 percent to 18,812
- Domestic guest nights rose 5.1 percent to 35,382
- The average length of stay fell from 2.01 nights to 1.95 nights
- The overall occupancy rate fell from 35.8 percent to 35.6 percent
- The occupancy rate, excluding holiday parks, was 44.1 percent in October 2018
- Accommodation capacity, excluding holiday parks, fell 7.9 percent.

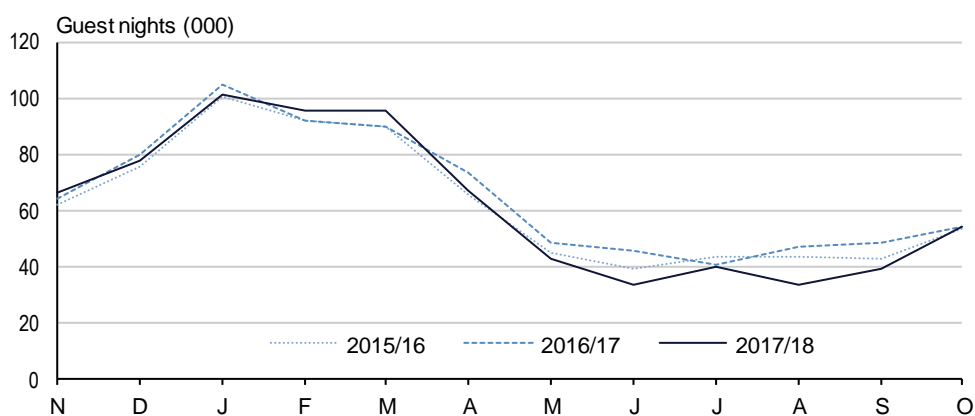
Response rates for October 2018

The response rate for the Marlborough RTO area was 77 percent for October 2018. However, backpacker accommodation had a much lower response rate, which may affect the reliability of their data.

The proportion of the origin-of-guest estimate from unadjusted data was 63 percent.

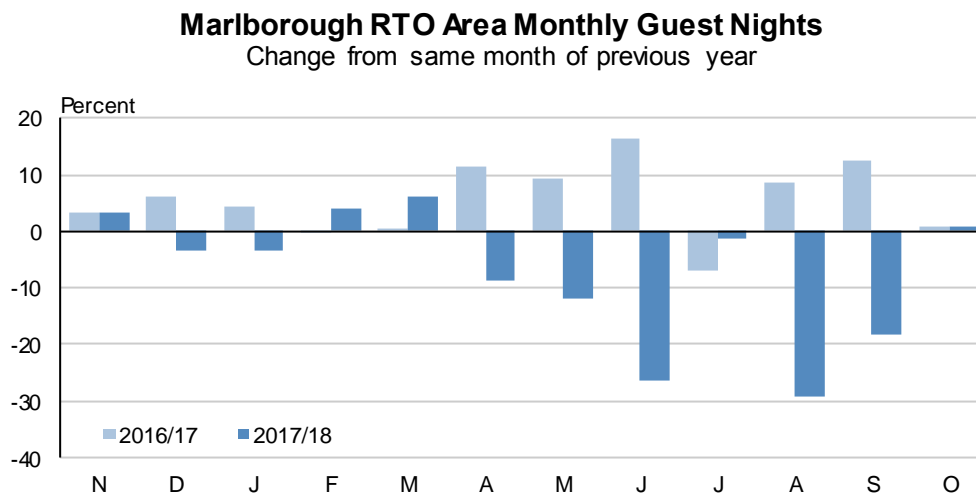
Figure 1.1

Marlborough RTO Area Monthly Guest Nights



Source: Stats NZ

Figure 1.2



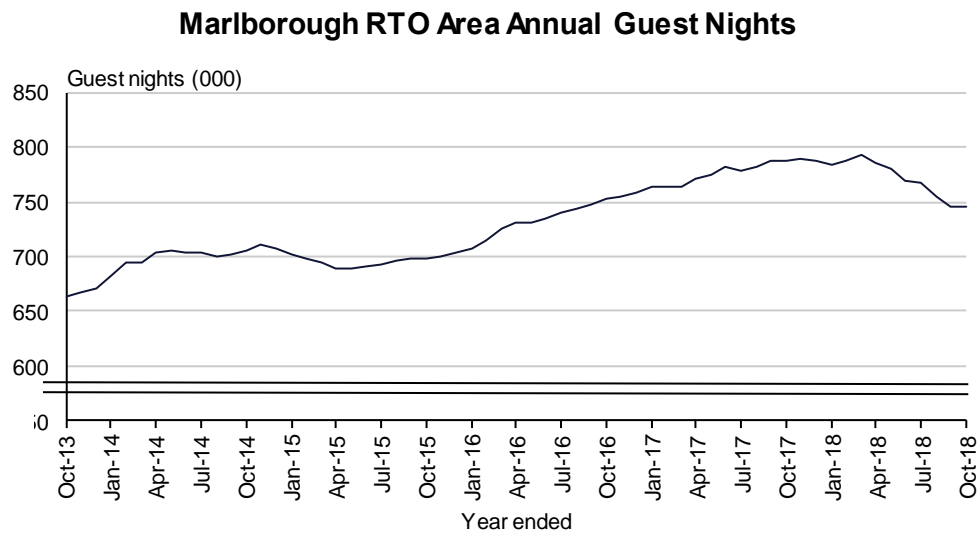
Source: Stats NZ

Year ended highlights

For the year ended October 2018 compared with the previous year:

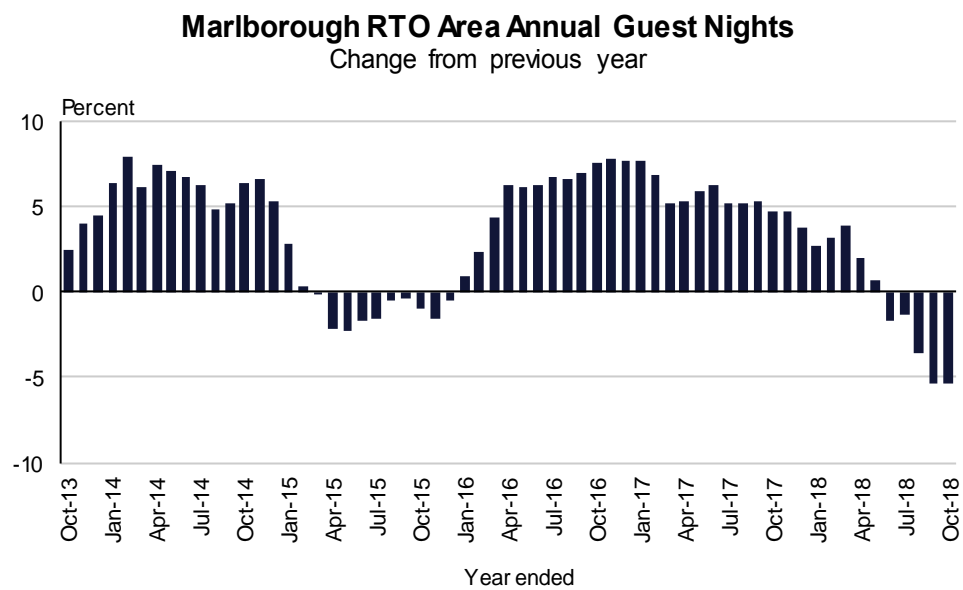
- Guest nights fell 5.4 percent to 745,736
- International guest nights fell 12.8 percent to 305,564
- Domestic guest nights rose 0.6 percent to 440,172
- The average length of stay fell from 1.97 nights to 1.85 nights
- The overall occupancy rate fell from 42.4 percent to 40.7 percent
- The occupancy rate, excluding holiday parks, was 51.5 percent for the year ended October 2018
- Accommodation capacity, excluding holiday parks, fell 5.3 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

2 Accommodation variables

In October 2018, compared with October 2017, there was an increase of 0.7 percent in total guest nights for the Marlborough RTO area. Holiday parks had the largest increase, followed by motels. Backpackers had the only decrease.

For the year ended October 2018, compared with the previous October year, total guest nights for the Marlborough RTO area decreased 5.4 percent. Backpackers had the largest decrease, followed by hotels. Holiday parks had the only increase.

See table 2.1 for comparisons of data across the main accommodation variables.

Table 2.1

Marlborough Accommodation Variables*By accommodation type
Monthly and year ended⁽¹⁾⁽²⁾*

Accommodation type	Monthly			Annual		
	October		Percentage change	Year ended		Percentage change
	2017	2018		October 2017	October 2018	
Guest nights						
Total guest nights	53,813	54,194	0.7	787,888	745,736	-5.4
International	20,153	18,812	-6.7	350,494	305,564	-12.8
Domestic	33,660	35,382	5.1	437,394	440,172	0.6
Hotels	7,742	7,934	2.5	109,455	106,910	-2.3
Motels/apartments	24,389	24,877	2.0	319,381	318,713	-0.2
Backpackers	9,094	7,022	-22.8	169,145	122,679	-27.5
Holiday parks	12,589	14,361	14.1	189,907	197,435	4.0
Occupancy rates ⁽³⁾ (%)						
Hotels	50.4	47.6	-5.7	56.7	52.5	-7.5
Motels/apartments	61.7	56.5	-8.4	64.7	62.2	-3.9
Backpackers	31.5	27.6	-12.6	42.1	39.1	-7.1
Holiday parks	17.4	22.9	31.2	23.5	23.8	1.3
Total	35.8	35.6	-0.5	42.4	40.7	-3.9
Total excluding holiday parks ⁽⁴⁾	46.9	44.1	-6.0	53.6	51.5	-3.8
Average length of stay ⁽⁵⁾						
Hotels	1.56	1.44	-7.3	1.66	1.46	-12.1
Motels/apartments	2.04	1.85	-9.4	1.92	1.83	-4.5
Backpackers	2.36	2.52	7.1	2.25	2.21	-1.8
Holiday parks	2.12	2.35	10.9	2.07	1.95	-5.8
Total	2.01	1.95	-3.3	1.97	1.85	-6.4
Guest arrivals						
Hotels	4,969	5,491	10.5	65,842	73,143	11.1
Motels/apartments	11,965	13,473	12.6	166,327	173,803	4.5
Backpackers	3,860	2,782	-27.9	75,209	55,569	-26.1
Holiday parks	5,931	6,099	2.8	91,606	101,094	10.4
Total	26,724	27,845	4.2	398,984	403,609	1.2
Establishments						
Hotels	13	13	0.0	13	13	0.0
Motels/apartments	48	47	-2.1	48	47	-2.1
Backpackers	19	16	-15.8	19	16	-15.8
Holiday parks	15	15	0.0	15	15	0.0
Total	95	91	-4.2	95	91	-4.2
Capacity ⁽⁶⁾						
Hotels	9,393	9,424	0.3	113,106	113,309	0.2
Motels/apartments	23,994	24,304	1.3	278,688	286,954	3.0
Backpackers	25,203	20,243	-19.7	300,732	255,304	-15.1
Holiday parks	35,433	35,867	1.2	411,329	419,747	2.0
Total	94,023	89,838	-4.5	1,103,855	1,075,314	-2.6

(1) Reclassifications, new businesses, ceased businesses, and temporary closures may affect figures.

(2) Irregular events, such as airshow s and Easter, may affect percentage changes and other figures.

(3) Occupancy rates are calculated as the ratio of used stay-unit nights to available stay-unit nights.

(4) Holiday parks often have high capacity and can mislead when included in total occupancy rates.

(5) Average length of stay is calculated as the ratio of guest nights to guest arrivals.

(6) Capacity is calculated as the number of available stay-units multiplied by the number of days in the month.

Symbol:

C confidential

3 Origin of guests

In October 2018, international guests accounted for 34.7 percent of all guest nights in the Marlborough RTO area. When compared with October 2017, the number of international guest nights spent in the area in October 2018 was down 6.7 percent to 18,812. Domestic guest nights increased 5.1 percent, to 35,382, for the same period.

The proportion of the origin-of-guest estimate from actual data was 63 percent for October 2018.

Figure 3.1

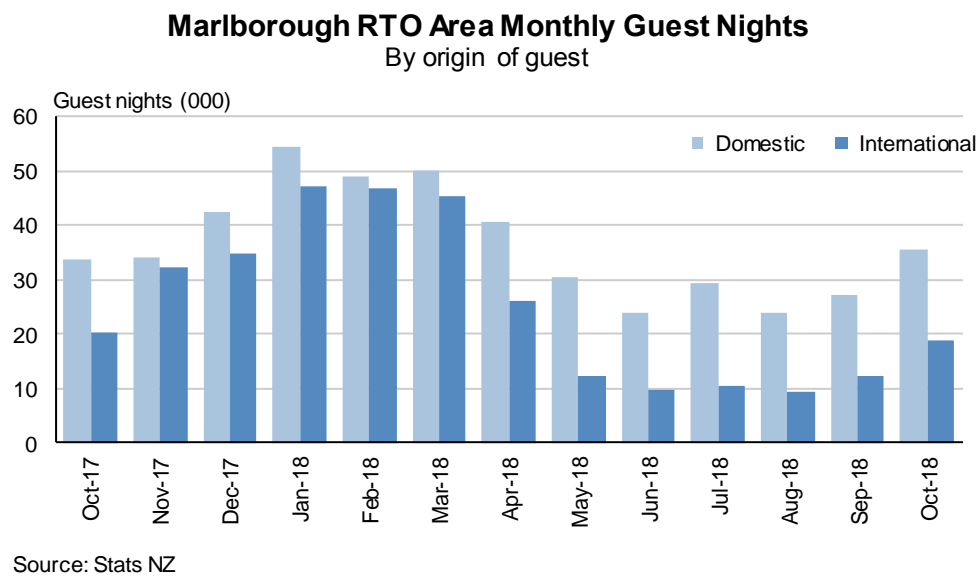


Table 3.1

Marlborough and New Zealand Monthly Guest Nights*By origin of guest*

		Marlborough RTO ⁽¹⁾ area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2017	Oct	33,660	20,153	53,813	1,843,147	1,303,650	3,146,797
	Nov	33,942	32,199	66,141	1,732,137	1,673,546	3,405,683
	Dec	42,391	34,933	77,325	2,215,289	1,926,411	4,141,700
2018	Jan	54,262	47,036	101,298	2,851,307	2,117,813	4,969,120
	Feb	48,866	46,679	95,544	1,938,307	2,092,637	4,030,944
	Mar	50,044	45,183	95,226	2,180,388	1,996,067	4,176,455
	Apr	40,794	26,197	66,991	1,860,719	1,569,372	3,430,091
	May	30,496	12,386	42,882	1,493,682	1,047,474	2,541,156
	Jun	23,791	9,900	33,691	1,443,331	824,407	2,267,738
	Jul	29,313	10,581	39,894	1,688,075	989,310	2,677,385
	Aug	23,852	9,337	33,189	1,571,502	952,679	2,524,181
	Sep	27,041	12,320	39,360	1,701,704	1,046,180	2,747,884
	Oct	35,382	18,812	54,194	1,954,146	1,314,205	3,268,352
Percent change from the current month of the previous year							
		5.1	-6.7	0.7	6.0	0.8	3.9
Year ended							
October 2017		437,394	350,494	787,888	22,127,190	17,038,301	39,165,491
October 2018		440,172	305,564	745,736	22,630,586	17,550,102	40,180,688
Percent change from previous year							
		0.6	-12.8	-5.4	2.3	3.0	2.6

(1) Regional tourism organisation

4 National results

In October 2018, a total of 3,268,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 122,000 nights (3.9 percent) from October 2017. Both the North Island (up 58,000 or 3.0 percent) and South Island (up 64,000 or 5.2 percent) recorded an increase.

Three of the accommodation types recorded an increase in guest nights in October 2018, compared with October 2017. Holiday parks had the largest increase in guest nights (up 43,000 or 7.9 percent), followed by hotels (up 82,000 or 7.1 percent), and motels (up 5,000 or 0.5 percent). Backpackers had the only decrease in guest nights (down 9,000 or 2.1 percent).

For the year ended October 2018, there were 40,181,000 guest nights, an increase of 1,015,000 (2.6 percent) from the previous October year.

Refer to Table 4.1 for comparisons of data.

Table 4.1

Marlborough and New Zealand Guest Nights					
<i>By accommodation type</i>					
<i>Monthly and year ended</i>					
Accommodation type	Total guest nights			Percentage change	
	2016	2017	2018	2016 to 2017	2017 to 2018
October month					
Marlborough RTO area					
Hotels	8,752	7,742	7,934	-11.5	2.5
Motels	22,833	24,389	24,877	6.8	2.0
Backpackers	11,145	9,094	7,022	-18.4	-22.8
Holiday parks	10,632	12,589	14,361	18.4	14.1
Total	53,362	53,813	54,194	0.8	0.7
New Zealand					
Hotels	1,136,237	1,150,362	1,232,395	1.2	7.1
Motels	997,588	1,043,166	1,048,510	4.6	0.5
Backpackers	402,188	408,316	399,668	1.5	-2.1
Holiday parks	468,049	544,953	587,779	16.4	7.9
Total	3,004,062	3,146,797	3,268,352	4.8	3.9
Year ended October					
Marlborough RTO area					
Hotels	C	109,455	106,910	C	-2.3
Motels	273,186	319,381	318,713	16.9	-0.2
Backpackers	198,367	169,145	122,679	-14.7	-27.5
Holiday parks	C	189,907	197,435	C	4.0
Total	751,938	787,888	745,736	4.8	-5.4
New Zealand					
Hotels	13,549,290	13,816,395	14,359,936	2.0	3.9
Motels	11,996,511	12,331,124	12,435,284	2.8	0.8
Backpackers	5,149,133	5,171,404	5,084,332	0.4	-1.7
Holiday parks	7,516,386	7,846,568	8,301,137	4.4	5.8
Total	38,211,320	39,165,491	40,180,688	2.5	2.6

5 Regional comparison

In October 2018, Central Otago recorded the largest increase in guest nights (up 8,000 or 48.0 percent) from October 2017. This was followed by Clutha (up 2,000 or 32.5 percent), Wairarapa (up 4,000 or 20.7 percent), Whakatane-Kawerau (up 4,000 or 18.9 percent), and Nelson-Tasman (up 12,000 or 12.4 percent).

Hurunui recorded the largest decrease (down 5,000 or 13.3 percent), followed by Ruapehu (down 2,000 or 4.2 percent), Rotorua (down 7,000 or 3.6 percent), Waikato (down 3,000 or 2.4 percent), and Northland (down 2,000 or 1.7 percent).

Table 5.1

Regional Tourism Organisation Areas' Monthly Guest Nights*By origin of guest*

RTO area	October guest nights								
	Domestic			International			Total		
	2017	2018	Percent age change	2017	2018	Percent age change	2017	2018	Percent age change
Northland	87,400	93,710	7.2	58,237	49,515	-15.0	145,637	143,225	-1.7
Auckland	322,334	340,976	5.8	280,463	305,372	8.9	602,797	646,348	7.2
Coromandel	43,448	50,666	16.6	19,022	18,864	-0.8	62,470	69,530	11.3
Waikato	94,918	94,898	0.0	29,717	26,772	-9.9	124,634	121,670	-2.4
Bay of Plenty	69,607	72,562	4.2	27,396	25,699	-6.2	97,003	98,261	1.3
Rotorua	107,728	110,305	2.4	91,600	81,907	-10.6	199,328	192,212	-3.6
Taupo	65,534	67,512	3.0	28,192	26,656	-5.4	93,726	94,168	0.5
Whakatane-									
Kawerau	14,534	18,386	26.5	4,372	4,097	-6.3	18,907	22,484	18.9
Gisborne	23,503	25,521	8.6	4,839	4,132	-14.6	28,342	29,654	4.6
Taranaki	44,073	47,564	7.9	8,766	8,405	-4.1	52,839	55,970	5.9
Hawke's Bay	75,850	74,882	-1.3	23,865	23,685	-0.8	99,715	98,567	-1.2
Ruapehu	28,076	28,256	0.6	14,405	12,447	-13.6	42,481	40,702	-4.2
Manawatu	42,895	49,226	14.8	7,123	6,124	-14.0	50,018	55,350	10.7
Whanganui	12,584	13,621	8.2	3,515	3,263	-7.2	16,099	16,884	4.9
Wairarapa	15,793	19,416	22.9	2,987	3,246	8.7	18,780	22,662	20.7
Kapiti-Horowhenua	19,696	20,157	2.3	2,678	3,054	14.0	22,374	23,211	3.7
Wellington	160,128	169,391	5.8	76,536	69,073	-9.8	236,664	238,464	0.8
Marlborough	33,660	35,382	5.1	20,153	18,812	-6.7	53,813	54,194	0.7
Nelson-Tasman	67,516	76,662	13.5	32,250	35,430	9.9	99,766	112,092	12.4
Canterbury	181,862	190,812	4.9	130,630	136,574	4.5	312,492	327,386	4.8
Hurunui	23,399	19,839	-15.2	10,510	9,558	-9.1	33,908	29,398	-13.3
Mackenzie	20,141	21,611	7.3	45,795	48,776	6.5	65,937	70,388	6.8
Timaru	18,053	19,227	6.5	6,821	6,228	-8.7	24,874	25,455	2.3
West Coast	39,415	40,649	3.1	67,613	65,530	-3.1	107,028	106,179	-0.8
Wanaka	22,290	23,892	7.2	37,302	41,637	11.6	59,593	65,529	10.0
Queenstown	87,278	97,282	11.5	180,963	184,897	2.2	268,241	282,179	5.2
Waitaki	19,406	20,076	3.4	13,403	13,782	2.8	32,810	33,858	3.2
Central Otago	13,166	19,174	45.6	3,420	5,372	57.1	16,586	24,546	48.0
Dunedin	43,419	48,018	10.6	26,751	26,494	-1.0	70,170	74,512	6.2
Clutha	3,615	4,792	32.6	1,463	1,938	32.4	5,079	6,730	32.5
Fiordland	15,578	14,992	-3.8	32,920	35,781	8.7	48,498	50,772	4.7
Southland	26,245	24,689	-5.9	9,942	11,083	11.5	36,187	35,772	-1.1
Total	1,843,147	1,954,146	6.0	1,303,650	1,314,205	0.8	3,146,797	3,268,352	3.9

Table 5.2

Regional Tourism Organisation Areas' Monthly Occupancy Rates⁽¹⁾*By accommodation type*

RTO area	October 2018 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	41.1	59.7	37.9	13.1	26.8	47.6
Auckland	78.6	64.7	63.6	20.0	66.0	72.3
Coromandel	42.4	44.7	20.8	16.5	22.0	34.1
Waikato	65.9	67.0	37.9	14.1	42.6	59.5
Bay of Plenty	57.2	63.5	46.8	20.4	37.8	55.5
Rotorua	76.2	62.9	27.8	27.8	48.5	54.1
Taupo	58.4	57.7	37.8	17.4	39.5	50.1
Whakatane-Kawerau	C	55.6	C	11.1	20.4	51.5
Gisborne	C	57.5	C	9.5	23.5	52.9
Taranaki	55.9	58.4	32.8	17.0	38.4	52.4
Hawke's Bay	71.0	73.6	39.8	19.7	46.6	64.2
Ruaapehu	48.5	34.4	24.8	28.7	31.8	32.4
Manawatu	47.3	66.4	C	C	45.7	C
Whanganui	C	53.0	44.4	C	33.2	C
Wairarapa	56.7	55.0	C	C	29.2	C
Kapiti-Horowhenua	C	66.2	C	16.5	22.1	28.5
Wellington	82.4	76.0	C	C	67.0	C
Marlborough	47.6	56.5	27.6	22.9	35.6	44.1
Nelson-Tasman	54.8	55.7	41.4	20.1	34.1	49.3
Canterbury	71.5	62.6	36.0	19.9	44.9	57.2
Hurunui	C	48.7	C	18.8	29.1	38.0
Mackenzie	C	55.6	C	30.3	52.8	64.6
Timaru	C	67.7	C	16.7	34.4	58.9
West Coast	43.3	54.7	22.4	20.6	34.2	39.7
Wanaka	62.3	65.0	59.5	18.6	38.8	61.8
Queenstown	77.6	55.9	54.5	32.6	61.3	65.8
Waitaki	45.0	61.8	29.1	5.4	14.4	49.6
Central Otago	30.3	68.3	20.5	6.8	15.7	42.0
Dunedin	60.0	68.2	31.1	30.8	51.4	56.8
Clutha	C	47.1	C	17.5	26.6	37.7
Fiordland	50.8	49.4	C	C	38.1	C
Southland	40.8	57.1	23.3	13.8	33.2	41.8
Total	69.0	61.2	40.6	17.1	43.1	57.8

(1) Occupancy rates are calculated as the ratio of stay unit nights to monthly capacity.

(2) Occupancy rates excluding holiday parks are included because the capacity of holiday parks can distort the total occupancy rates.

Symbols:

C confidential

... not applicable

6 Accommodation Survey technical notes

Data source

We collect data from accommodation providers or their representatives each month, mostly via a postal survey.

Coverage

The Accommodation Survey covers most short-term commercial accommodation in New Zealand.

The target population for this survey is all accommodation providers with the following characteristics:

- operating on a commercial basis
- providing mainly short-term (less than one month) accommodation
- economically significant (generally meaning being GST-registered and having a turnover of at least \$30,000 per year)
- included in class 4400 (accommodation) or class 4520 (pubs, taverns, and bars) in ANZSIC06 (Australian and New Zealand Standard Industrial Classification 2006)
- classified to 'hotels', 'motels', 'backpacker accommodation', or 'holiday parks'.

Excluded:

- hosted accommodation (such as 'bed & breakfast' establishments)
- marine vessels (such as cruise ships)
- private dwellings
- tramping huts (non-commercial)
- event-specific accommodation (such as temporary campervan parks)
- businesses that cease operation or no longer provide short-term commercial accommodation
- businesses that temporarily shut down (eg for renovations) – we remove them from the survey until they re-open.

Accommodation type classification

The predominant capacity provided by a business determines the accommodation type. For instance, if the business provides both motel and camping ground accommodation, but the majority of its stay units are motel rooms, then we classify it as a motel. We use the New Zealand Accommodation Classification, broadly defined below:

- hotels (including resorts)
- motels (including motor inns and serviced apartments)
- backpacker accommodation (including short-stay hostels)
- holiday parks (including caravan parks and camping grounds).

Confidentiality

'C' symbols are used in the tables where information has been suppressed. We do not release data from individual businesses.

Changes to survey content

Establishments may change the way they operate over time. If they do, they may be reclassified from one accommodation type to another. For example, if a holiday park adds sufficient motel units that it is operating more as a motel than a holiday park, it will be subject to reclassification to the 'motels' accommodation type. This type of change will tend to reduce surveyed guest nights and other figures for holiday parks (because there would be one fewer holiday park) while boosting guest nights and other figures for motels (because there would be one more motel).

Guest night and other movements, where the latest month is compared with the same month of the previous year, are affected for 12 months from the time that any reclassification is done. After 12 months, the reclassified establishment will appear in the same accommodation type in both comparison months.

Reclassifications of establishments are not the only changes that affect survey content and figures for the Accommodation Survey:

- When establishments temporarily cease operations, we take them out of the survey until they re-open. These changes affect figures for the number of establishments and available capacity.
- Businesses that start up, shut down, or move into or out of the short-term commercial accommodation industry also affect survey figures.

Survey errors

This survey aims for 100 percent coverage of the accommodation businesses in New Zealand (a full census). However, in practice, the overall response rate is usually between 76 and 80 percent. We estimate values for the remaining units based on the characteristics of similar establishments in the same or similar regions. This introduces unknown errors into the estimates, and users of the data should bear this in mind. The size of these unknown errors is difficult to quantify.

Other errors include respondent error, and errors in coverage, classification, and processing. Our editing processes identify and remove many errors, but some will likely remain. We cannot quantify the effect of the remaining errors.

Comparability

Accommodation Survey statistics are not always on the same basis as statistics from other sources. For example, 'average length of stay' in the Accommodation Survey is for all guests (domestic plus international), but in the [International Visitor Arrivals to New Zealand](#) reports, it is only for international guests.

More information

For further information on the Accommodation Survey, refer to webpage http://www.stats.govt.nz/browse_for_stats/industry_sectors/accommodation.aspx