



Commercial Accommodation Monitor:

September 2018

Marlborough

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Preface

Commercial Accommodation Monitor: September 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 October 2018 monitor will be released on 17 December 2018.

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 September 2018 compared with September 2017:

- Guest nights fell 18.4 percent to 39,360
- International guest nights fell 30.1 percent to 12,320
- Domestic guest nights fell 11.6 percent to 27,041
- The average length of stay fell from 2.19 nights to 2.02 nights
- The overall occupancy rate fell from 33.3 percent to 28.7 percent
- The occupancy rate, excluding holiday parks, was 36.8 percent in September 2018
- Accommodation capacity, excluding holiday parks, fell 5.2 percent.

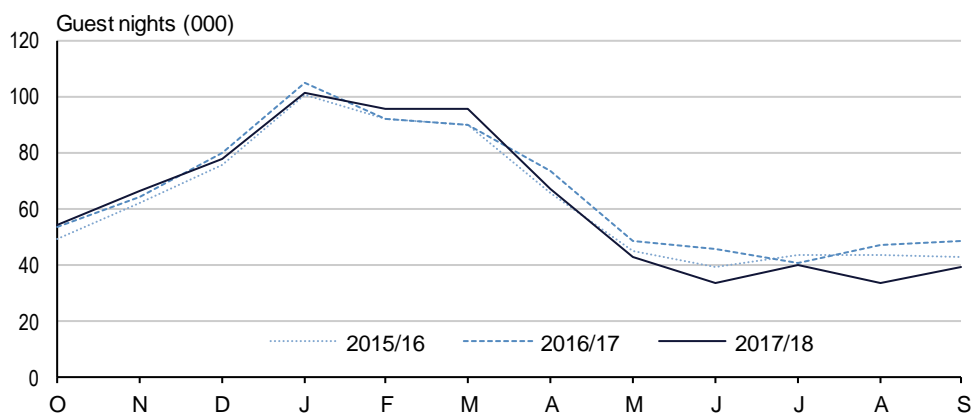
Response rates for September 2018

The response rate for the Marlborough RTO area was 78 percent for September 2018.

The proportion of the origin-of-guest estimate from unadjusted data was 65 percent.

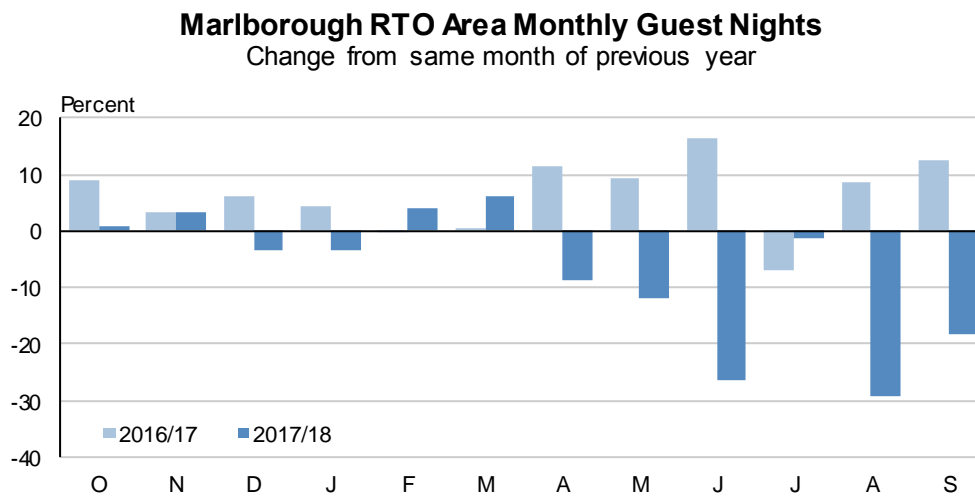
Figure 1.1

Marlborough RTO Area Monthly Guest Nights



Source: Stats NZ

Figure 1.2



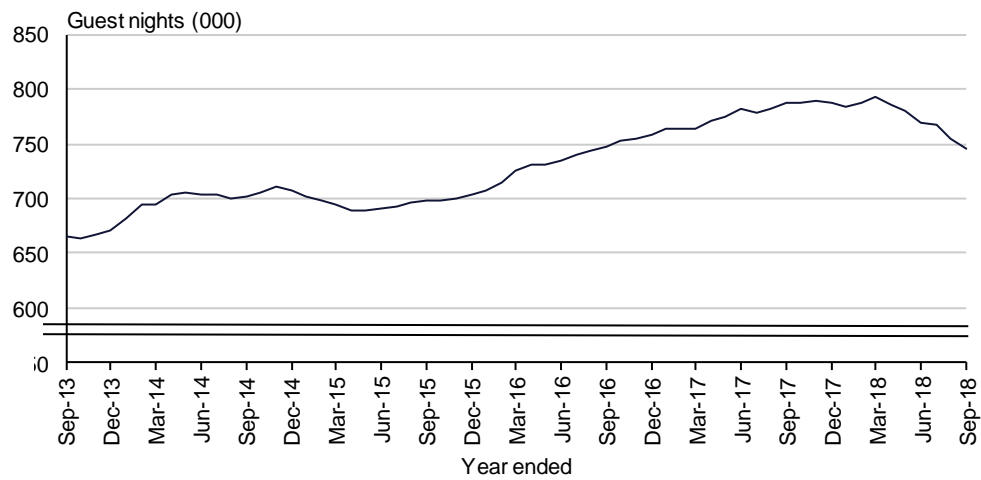
Source: Stats NZ

Year ended highlights

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

- Guest nights fell 5.3 percent to 745,355
- International guest nights fell 13.5 percent to 306,904
- Domestic guest nights rose 1.4 percent to 438,450
- The average length of stay fell from 1.97 nights to 1.85 nights
- The overall occupancy rate fell from 42.1 percent to 40.7 percent
- The occupancy rate, excluding holiday parks, was 51.7 percent for the year ended September 2018
- Accommodation capacity, excluding holiday parks, fell 5.1 percent.

Figure 1.3

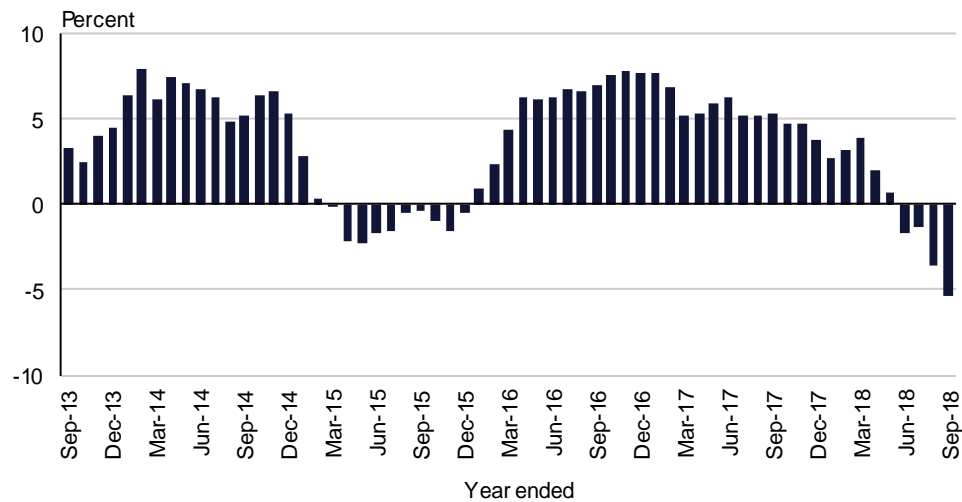
Marlborough RTO Area Annual Guest Nights

Source: Stats NZ

Figure 1.4

Marlborough RTO Area Annual Guest Nights

Change from previous year



Source: Stats NZ

2 Accommodation variables

In September 2018, compared with September 2017, there was a decrease of 18.4 percent in total guest nights for the Marlborough RTO area. Backpackers had the largest decrease, followed by motels.

For the year ended September 2018, compared with the previous September year, total guest nights for the Marlborough RTO area decreased 5.3 percent. Backpackers had the largest decrease, followed by hotels. Holiday parks had the largest 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		
	September		Percentage change	Year ended		Percentage change
	2017	2018		September 2017	September 2018	
Guest nights						
Total guest nights	48,226	39,360	-18.4	787,437	745,355	-5.3
International	17,627	12,320	-30.1	354,863	306,904	-13.5
Domestic	30,599	27,041	-11.6	432,573	438,450	1.4
Hotels	6,205	5,363	-13.6	110,466	106,717	-3.4
Motels/apartments	21,502	19,298	-10.2	317,824	318,225	0.1
Backpackers	10,999	5,261	-52.2	171,196	124,750	-27.1
Holiday parks	9,521	9,438	-0.9	187,950	195,662	4.1
Occupancy rates ⁽³⁾ (%)						
Hotels	45.0	35.6	-20.9	56.9	52.7	-7.4
Motels/apartments	58.8	48.2	-18.1	64.5	62.7	-2.8
Backpackers	31.4	24.0	-23.7	41.9	39.3	-6.1
Holiday parks	14.8	16.4	10.5	23.2	23.3	0.3
Total	33.3	28.7	-13.9	42.1	40.7	-3.5
Total excluding holiday parks ⁽⁴⁾	44.7	36.8	-17.8	53.3	51.7	-2.9
Average length of stay ⁽⁵⁾						
Hotels	1.43	1.59	11.1	1.69	1.47	-12.8
Motels/apartments	2.17	1.87	-13.7	1.91	1.85	-3.1
Backpackers	2.78	2.63	-5.6	2.25	2.20	-2.0
Holiday parks	2.53	2.48	-2.0	2.05	1.94	-5.5
Total	2.19	2.02	-8.0	1.97	1.85	-5.9
Guest arrivals						
Hotels	4,347	3,381	-22.2	65,554	72,621	10.8
Motels/apartments	9,911	10,310	4.0	166,759	172,294	3.3
Backpackers	3,950	2,002	-49.3	76,204	56,647	-25.7
Holiday parks	3,770	3,813	1.2	91,625	100,926	10.2
Total	21,977	19,506	-11.2	400,142	402,488	0.6
Establishments						
Hotels	13	13	0.0	13	13	0.0
Motels/apartments	46	47	2.2	46	47	2.2
Backpackers	18	16	-11.1	18	16	-11.1
Holiday parks	15	15	0.0	15	15	0.0
Total	92	91	-1.1	92	91	-1.1
Capacity ⁽⁶⁾						
Hotels	9,090	9,120	0.3	113,292	113,278	0.0
Motels/apartments	22,500	23,520	4.5	276,704	286,644	3.6
Backpackers	24,060	20,130	-16.3	305,537	260,264	-14.8
Holiday parks	34,290	34,710	1.2	410,058	419,313	2.3
Total	89,940	87,480	-2.7	1,105,591	1,079,499	-2.4

(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 September 2018, international guests accounted for 31.3 percent of all guest nights in the Marlborough RTO area. When compared with September 2017, the number of international guest nights spent in the area in September 2018 was down 30.1 percent to 12,320. Domestic guest nights decreased 11.6 percent, to 27,041, for the same period.

The proportion of the origin-of-guest estimate from actual data was 65 percent for September 2018.

Figure 3.1

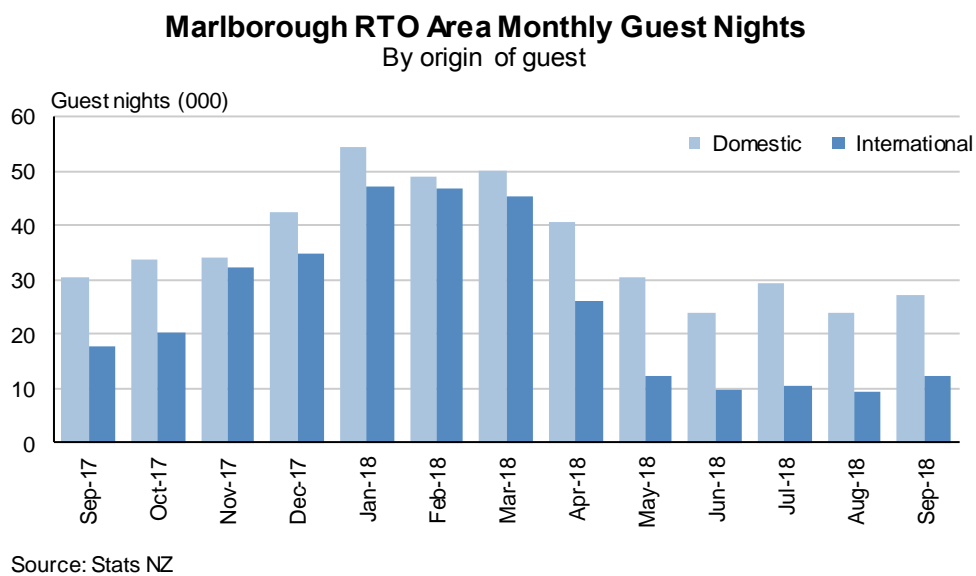


Table 3.1

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	Sep	30,599	17,627	48,226	1,639,056	1,030,456	2,669,511
	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
Percent change from the current month of the previous year							
		-11.6	-30.1	-18.4	3.8	1.5	2.9
Year ended							
September 2017		432,573	354,863	787,437	22,046,354	16,976,402	39,022,756
September 2018		438,450	306,904	745,355	22,519,587	17,539,546	40,059,134
Percent change from previous year							
		1.4	-13.5	-5.3	2.1	3.3	2.7

(1) Regional tourism organisation

4 National results

In September 2018, a total of 2,748,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 78,000 nights (2.9 percent) from September 2017. Both the North Island (up 58,000 or 3.6 percent) and South Island (up 20,000 or 1.9 percent) recorded an increase.

All four accommodation types recorded an increase in guest nights in September 2018, compared with September 2017. Motels had the largest increase in guest nights (up 27,000 or 3.0 percent), followed by hotels (up 23,000 or 2.2 percent), holiday parks (up 23,000 or 6.1 percent), and backpackers (up 5,000 or 1.6 percent).

For the year ended September 2018, there were 40,059,000 guest nights, an increase of 1,036,000 (2.7 percent) from the previous September 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
September month					
Marlborough RTO area					
Hotels	C	6,205	5,363	C	-13.6
Motels	15,839	21,502	19,298	35.8	-10.2
Backpackers	12,122	10,999	5,261	-9.3	-52.2
Holiday parks	C	9,521	9,438	C	-0.9
Total	42,820	48,226	39,360	12.6	-18.4
New Zealand					
Hotels	1,027,905	1,070,977	1,094,219	4.2	2.2
Motels	902,462	889,823	916,580	-1.4	3.0
Backpackers	333,840	326,488	331,715	-2.2	1.6
Holiday parks	369,457	382,224	405,370	3.5	6.1
Total	2,633,664	2,669,511	2,747,884	1.4	2.9
Year ended September					
Marlborough RTO area					
Hotels	C	110,466	106,717	C	-3.4
Motels	270,641	317,824	318,225	17.4	0.1
Backpackers	197,935	171,196	124,750	-13.5	-27.1
Holiday parks	C	187,950	195,662	C	4.1
Total	747,488	787,437	745,355	5.3	-5.3
New Zealand					
Hotels	13,485,687	13,802,270	14,277,903	2.3	3.4
Motels	11,927,072	12,285,546	12,429,939	3.0	1.2
Backpackers	5,135,342	5,165,276	5,092,980	0.6	-1.4
Holiday parks	7,492,644	7,769,664	8,258,312	3.7	6.3
Total	38,040,745	39,022,756	40,059,134	2.6	2.7

5 Regional comparison

In September 2018, Auckland recorded the largest increase in guest nights (up 34,000 or 6.1 percent) from September 2017. This was followed by Wellington (up 15,000 or 7.1 percent), Dunedin (up 6,000 or 10.2 percent), Wanaka (up 6,000 or 9.2 percent), and Mackenzie (up 4,000 or 7.9 percent).

Marlborough recorded the largest decrease (down 9,000 or 18.4 percent), followed by West Coast (down 6,000 or 7.6 percent), Rotorua (down 5,000 or 3.3 percent), Taranaki (down 5,000 or 10.5 percent), and Timaru (down 1,000 or 4.5 percent).

Table 5.1

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

RTO area	September guest nights								
	Domestic			International			Total		
	2017	2018	Percent age change	2017	2018	Percent age change	2017	2018	Percent age change
Northland	61,585	69,608	13.0	33,982	26,955	-20.7	95,567	96,563	1.0
Auckland	315,331	324,739	3.0	237,704	261,999	10.2	553,035	586,738	6.1
Coromandel	30,359	33,115	9.1	11,555	11,307	-2.1	41,913	44,422	6.0
Waikato	78,529	79,151	0.8	18,818	20,040	6.5	97,347	99,191	1.9
Bay of Plenty	67,417	69,157	2.6	20,569	19,501	-5.2	87,985	88,658	0.8
Rotorua	93,574	95,632	2.2	64,213	56,947	-11.3	157,787	152,579	-3.3
Taupo	58,551	61,107	4.4	20,775	21,834	5.1	79,326	82,941	4.6
Whakatane-									
Kawerau	11,671	12,860	10.2	2,971	2,192	-26.2	14,642	15,052	2.8
Gisborne	21,111	22,665	7.4	3,381	2,921	-13.6	24,493	25,586	4.5
Taranaki	41,137	37,960	-7.7	6,767	4,923	-27.3	47,904	42,883	-10.5
Hawke's Bay	63,602	62,856	-1.2	14,433	17,435	20.8	78,035	80,291	2.9
Ruapehu	36,286	37,190	2.5	7,471	7,935	6.2	43,757	45,125	3.1
Manawatu	41,420	45,035	8.7	6,820	4,821	-29.3	48,240	49,856	3.4
Whanganui	10,992	13,339	21.4	2,704	2,441	-9.7	13,696	15,780	15.2
Wairarapa	14,674	16,019	9.2	2,145	1,396	-34.9	16,818	17,414	3.5
Kapiti-Horowhenua	14,531	15,098	3.9	1,838	1,971	7.3	16,369	17,070	4.3
Wellington	142,426	168,156	18.1	68,173	57,342	-15.9	210,599	225,499	7.1
Marlborough	30,599	27,041	-11.6	17,627	12,320	-30.1	48,226	39,360	-18.4
Nelson-Tasman	52,682	51,599	-2.1	20,181	23,043	14.2	72,862	74,643	2.4
Canterbury	161,182	153,071	-5.0	99,765	109,527	9.8	260,947	262,598	0.6
Hurunui	14,920	16,451	10.3	6,745	6,901	2.3	21,665	23,352	7.8
Mackenzie	16,061	16,337	1.7	35,707	39,505	10.6	51,768	55,842	7.9
Timaru	15,119	14,620	-3.3	5,149	4,745	-7.9	20,268	19,365	-4.5
West Coast	31,646	35,354	11.7	48,610	38,793	-20.2	80,257	74,147	-7.6
Wanaka	23,826	22,305	-6.4	36,939	44,075	19.3	60,765	66,381	9.2
Queenstown	89,439	88,937	-0.6	177,678	178,118	0.2	267,117	267,055	0.0
Waitaki	12,036	15,298	27.1	8,644	8,429	-2.5	20,680	23,728	14.7
Central Otago	11,937	13,887	16.3	2,673	3,557	33.1	14,610	17,444	19.4
Dunedin	43,947	46,059	4.8	18,043	22,269	23.4	61,990	68,327	10.2
Clutha	3,127	4,176	33.6	1,018	1,556	52.7	4,145	5,732	38.3
Fiordland	8,633	10,535	22.0	20,636	22,571	9.4	29,269	33,106	13.1
Southland	20,710	22,346	7.9	6,720	8,812	31.1	27,430	31,158	13.6
Total	1,639,056	1,701,704	3.8	1,030,456	1,046,180	1.5	2,669,511	2,747,884	2.9

Table 5.2

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

RTO area	September 2018 occupancy rate					
	Accommodation type					Total excluding holiday parks ⁽²⁾
	Hotels	Motels	Backpackers	Holiday parks	Total	
	Percent					
Northland	35.1	48.3	27.9	8.9	20.6	38.5
Auckland	77.8	62.6	62.5	15.1	64.5	71.3
Coromandel	38.7	33.6	11.5	12.0	16.0	24.9
Waikato	56.3	63.7	25.5	10.8	36.8	52.2
Bay of Plenty	59.3	67.6	39.4	18.1	36.0	55.3
Rotorua	67.9	52.9	20.2	22.3	40.6	45.6
Taupo	59.2	56.0	29.4	14.8	35.7	46.4
Whakatane-Kawerau	C	54.8	C	6.4	16.8	47.7
Gisborne	C	54.5	C	7.6	21.7	51.2
Taranaki	47.5	46.1	24.9	12.6	30.6	42.3
Hawke's Bay	59.2	65.3	40.6	14.5	40.6	57.8
Ruapehu	54.7	40.0	C	C	40.7	C
Manawatu	45.6	60.9	C	C	42.0	C
Whanganui	C	54.6	45.5	C	32.7	C
Wairarapa	46.9	51.6	C	C	24.0	C
Kapiti-Horowhenua	C	55.5	C	11.9	17.0	22.9
Wellington	78.5	75.6	C	C	64.9	C
Marlborough	35.6	48.2	24.0	16.4	28.7	36.8
Nelson-Tasman	52.2	45.6	34.8	10.6	25.4	41.6
Canterbury	62.3	52.3	33.4	16.1	38.7	49.9
Hurunui	C	42.7	C	14.0	23.2	30.8
Mackenzie	C	48.8	C	21.4	44.7	56.9
Timaru	C	56.1	C	13.1	28.5	49.8
West Coast	29.1	42.5	18.0	14.9	25.2	29.2
Wanaka	71.4	72.3	46.0	16.4	37.5	61.3
Queenstown	74.9	54.6	57.6	28.0	60.3	65.7
Waitaki	C	48.7	C	3.5	10.6	39.2
Central Otago	C	47.7	C	4.9	10.4	30.3
Dunedin	61.1	67.1	30.4	24.6	49.9	56.5
Clutha	C	54.4	C	15.4	25.4	37.5
Fiordland	30.4	35.1	C	C	25.3	C
Southland	33.5	53.1	23.8	9.1	29.3	38.3
Total	64.7	55.3	36.6	12.8	38.6	53.3

(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