



Commercial Accommodation Monitor:

May 2019

Dunedin

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Preface

Commercial Accommodation Monitor: May 2019 – Dunedin presents comprehensive and impartial information on short-term commercial accommodation for the Dunedin 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:

- Dunedin City

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).

More data and commentary is available on the Stats NZ website (www.stats.govt.nz).

The June 2019 monitor will be released on 14 August 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 May 2019 compared with May 2018:

- Guest nights rose 1.1 percent to 68,115
- International guest nights fell 16.5 percent to 17,841
- Domestic guest nights rose 9.2 percent to 50,275
- The average length of stay fell from 1.83 nights to 1.82 nights
- The overall occupancy rate rose from 51.9 percent to 52.6 percent
- The occupancy rate, excluding holiday parks, was 60.5 percent in May 2019
- Accommodation capacity, excluding holiday parks, fell 1.0 percent.

Response rates for May 2019

The response rate for the Dunedin RTO area was 84 percent for May 2019.

The proportion of the origin-of-guest estimate from unadjusted data was 81 percent.

Figure 1.1

Dunedin RTO Area Monthly Guest Nights

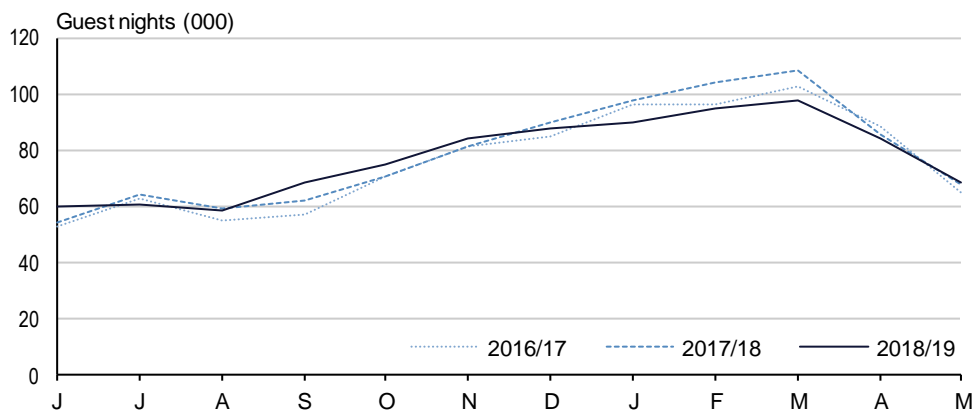
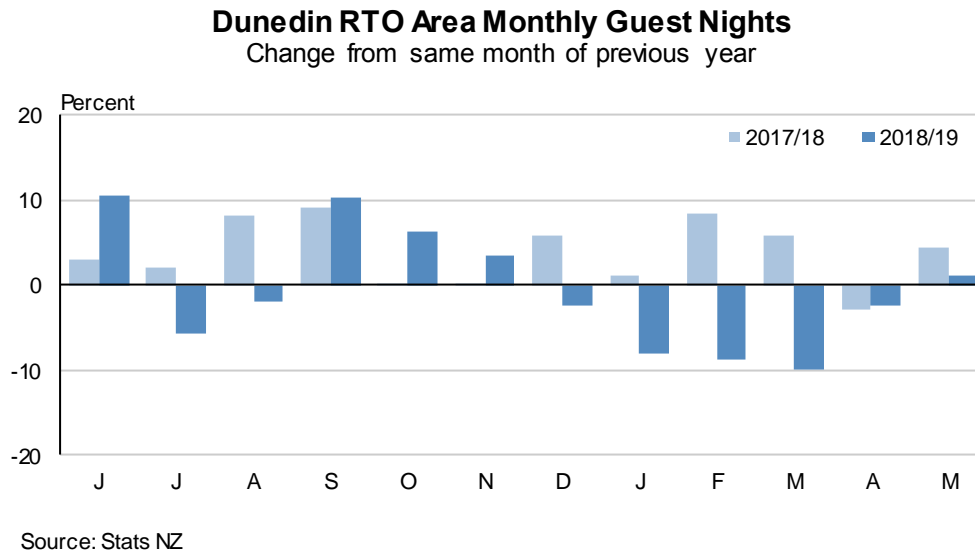


Figure 1.2

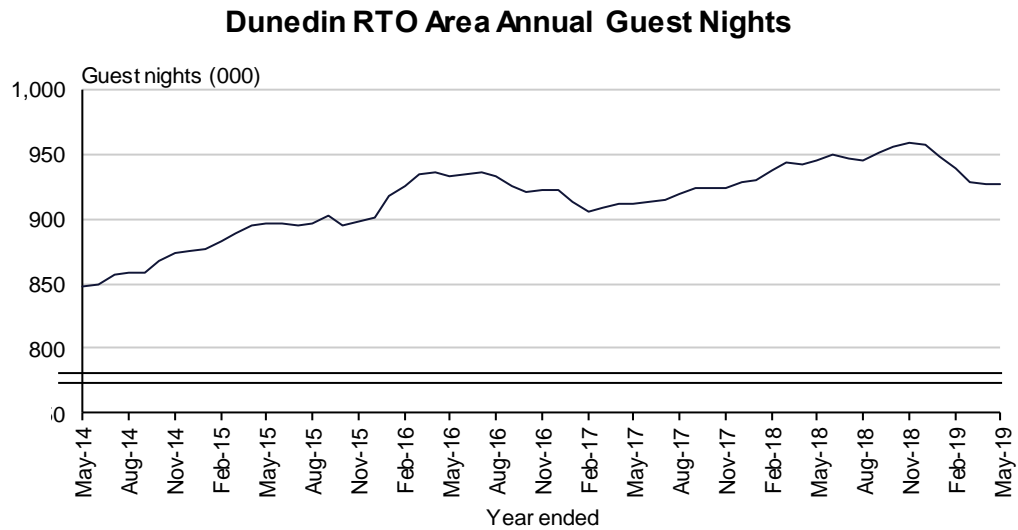


Year ended highlights

For the year ended May 2019 compared with the previous year:

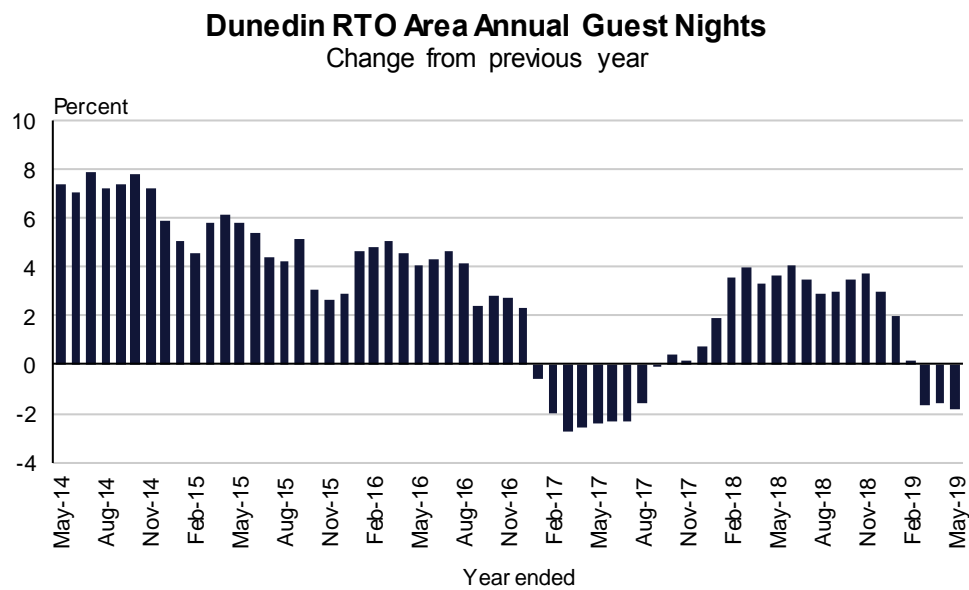
- Guest nights fell 1.8 percent to 927,175
- International guest nights fell 10.0 percent to 356,100
- Domestic guest nights rose 4.1 percent to 571,074
- The average length of stay rose from 1.79 nights to 1.80 nights
- The overall occupancy rate fell from 56.2 percent to 54.5 percent
- The occupancy rate, excluding holiday parks, was 60.2 percent for the year ended May 2019
- Accommodation capacity, excluding holiday parks, fell 0.5 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

2 Accommodation variables

In May 2019, compared with May 2018, there was an increase of 1.1 percent in total guest nights for the Dunedin RTO area. Motels had the largest increase, followed by backpackers. Hotels had the only decrease.

For the year ended May 2019, compared with the previous May year, total guest nights for the Dunedin RTO area decreased 1.8 percent. Backpackers had the largest decrease, followed by hotels. Motels had the only increase.

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

Table 2.1

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

Accommodation type	Monthly			Annual		
	May		Percentage change	Year ended		Percentage change
	2018	2019		May 2018	May 2019	
Guest nights						
Total guest nights	67,406	68,115	1.1	944,085	927,175	-1.8
International	21,364	17,841	-16.5	395,458	356,100	-10.0
Domestic	46,042	50,275	9.2	548,628	571,074	4.1
Hotels	25,661	24,221	-5.6	326,836	318,825	-2.5
Motels/apartments	28,028	29,692	5.9	369,762	378,125	2.3
Backpackers	5,802	6,172	6.4	91,854	77,996	-15.1
Holiday parks	7,915	8,031	1.5	155,634	152,228	-2.2
Occupancy rates ⁽³⁾ (%)						
Hotels	66.6	64.5	-3.2	66.0	63.1	-4.3
Motels/apartments	68.0	69.9	2.8	68.5	69.4	1.2
Backpackers	34.1	37.7	10.6	44.9	38.6	-14.1
Holiday parks	20.9	22.5	8.0	33.2	32.7	-1.5
Total	51.9	52.6	1.3	56.2	54.5	-3.0
Total excluding holiday parks ⁽⁴⁾	60.0	60.5	0.8	62.2	60.2	-3.2
Average length of stay ⁽⁵⁾						
Hotels	1.66	1.58	-4.7	1.58	1.64	3.6
Motels/apartments	1.95	1.94	-0.6	1.89	1.90	0.5
Backpackers	C	C	C	C	C	C
Holiday parks	C	C	C	C	C	C
Total	1.83	1.82	-0.8	1.79	1.80	0.7
Guest arrivals						
Hotels	15,458	15,312	-0.9	206,381	194,291	-5.9
Motels/apartments	14,388	15,329	6.5	195,215	198,578	1.7
Backpackers	C	C	C	C	C	C
Holiday parks	C	C	C	C	C	C
Total	36,817	37,493	1.8	528,363	515,220	-2.5
Establishments						
Hotels	16	16	0.0	16	16	0.0
Motels/apartments	48	43	-10.4	48	43	-10.4
Backpackers	8	8	0.0	8	8	0.0
Holiday parks	6	6	0.0	6	6	0.0
Total	78	73	-6.4	78	73	-6.4
Capacity ⁽⁶⁾						
Hotels	25,358	25,358	0.0	299,423	298,570	-0.3
Motels/apartments	24,738	23,932	-3.3	284,825	289,149	1.5
Backpackers	14,105	14,260	1.1	171,443	164,312	-4.2
Holiday parks	16,771	16,771	0.0	197,495	197,465	0.0
Total	80,972	80,321	-0.8	953,186	949,496	-0.4

(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 w hen 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:

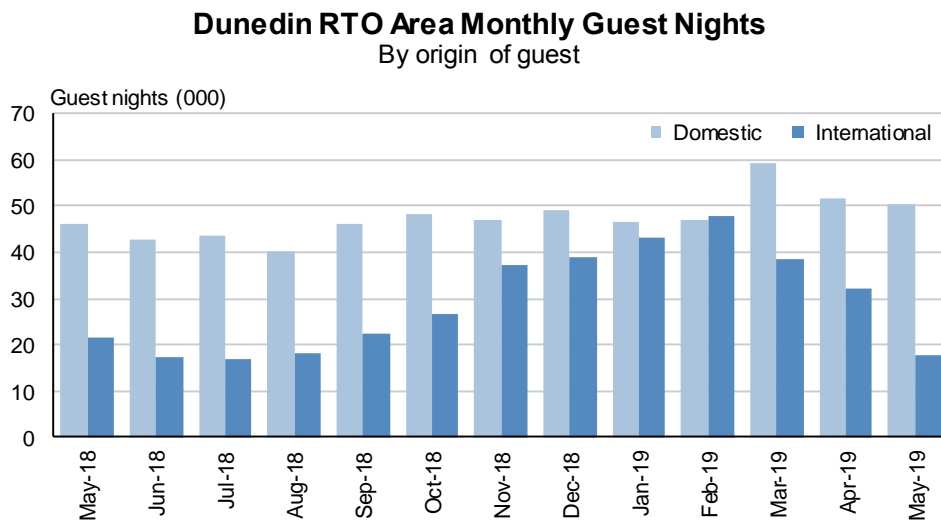
C confidential

3 Origin of guests

In May 2019, international guests accounted for 26.2 percent of all guest nights in the Dunedin RTO area. When compared with May 2018, the number of international guest nights spent in the area in May 2019 was down 16.5 percent to 17,841. Domestic guest nights increased 9.2 percent, to 50,275, for the same period.

The proportion of the origin-of-guest estimate from actual data was 81 percent for May 2019.

Figure 3.1



Source: Stats NZ

Table 3.1

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

		Dunedin RTO ⁽¹⁾ area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2018	May	46,042	21,364	67,406	1,493,682	1,047,474	2,541,156
	Jun	42,719	17,171	59,889	1,443,331	824,407	2,267,738
	Jul	43,730	16,742	60,472	1,688,075	989,310	2,677,385
	Aug	40,235	17,962	58,197	1,571,502	952,679	2,524,181
	Sep	46,059	22,269	68,327	1,701,704	1,046,180	2,747,884
	Oct	48,018	26,494	74,512	1,954,146	1,314,205	3,268,352
	Nov	47,152	37,021	84,173	1,804,941	1,730,166	3,535,107
	Dec	48,940	38,837	87,777	2,289,702	1,908,866	4,198,568
2019	Jan	46,344	43,142	89,487	2,879,204	2,088,517	4,967,720
	Feb	46,851	47,952	94,803	1,988,788	2,026,586	4,015,374
	Mar	59,184	38,534	97,719	2,125,847	1,882,162	4,008,009
	Apr	51,569	32,135	83,704	2,123,710	1,480,938	3,604,648
	May	50,275	17,841	68,115	1,592,880	970,273	2,563,153
Percent change from the current month of the previous year							
		9.2	-16.5	1.1	6.6	-7.4	0.9
Year ended							
May 2018		548,628	395,458	944,085	22,306,970	17,627,681	39,934,652
May 2019		571,074	356,100	927,175	23,163,829	17,214,290	40,378,119
Percent change from previous year							
		4.1	-10.0	-1.8	3.8	-2.3	1.1

(1) Regional tourism organisation

4 National results

In May 2019, a total of 2,563,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 22,000 nights (0.9 percent) from May 2018. The North Island recorded an increase (up 41,000 or 2.6 percent) while the South Island recorded a decrease (down 19,000 or 2.0 percent).

Three of the four accommodation types recorded an increase in guest nights in May 2019, compared with May 2018.

Holiday parks had the largest increase in guest nights (up 22,000 or 6.2 percent), followed by hotels (up 5,000 or 0.5 percent), and motels (up 5,000 or 0.6 percent). Backpackers had the only decrease in guest nights (down 10,000 or 3.0 percent).

Refer to Table 4.1 for comparisons of data.

Table 4.1

Dunedin and New Zealand Guest Nights

*By accommodation type
Monthly and year ended*

Accommodation type	Total guest nights			Percentage change	
	2017	2018	2019	2017 to 2018	2018 to 2019
May month					
Dunedin RTO area					
Hotels	23,210	25,661	24,221	10.6	-5.6
Motels	25,653	28,028	29,692	9.3	5.9
Backpackers	7,423	5,802	6,172	-21.8	6.4
Holiday parks	8,334	7,915	8,031	-5.0	1.5
Total	64,621	67,406	68,115	4.3	1.1
New Zealand					
Hotels	1,009,132	1,045,838	1,050,622	3.6	0.5
Motels	790,712	801,086	805,797	1.3	0.6
Backpackers	346,181	333,259	323,335	-3.7	-3.0
Holiday parks	354,802	360,974	383,399	1.7	6.2
Total	2,500,827	2,541,156	2,563,153	1.6	0.9
Year ended May					
Dunedin RTO area					
Hotels	320,633	326,836	318,825	1.9	-2.5
Motels	344,862	369,762	378,125	7.2	2.3
Backpackers	C	91,854	77,996	C	-15.1
Holiday parks	C	155,634	152,228	C	-2.2
Total	910,977	944,085	927,175	3.6	-1.8
New Zealand					
Hotels	13,690,406	14,216,390	14,494,310	3.8	2.0
Motels	12,235,245	12,356,450	12,484,662	1.0	1.0
Backpackers	5,175,497	5,154,024	4,976,545	-0.4	-3.4
Holiday parks	7,710,793	8,207,789	8,422,602	6.4	2.6
Total	38,811,942	39,934,652	40,378,119	2.9	1.1

5 Regional comparison

In May 2019, Auckland recorded the largest increase in guest nights (up 13,000 or 2.4 percent) from May 2018. This was followed by Wellington (up 11,000 or 5.2 percent), Waikato (up 7,000 or 7.6 percent), Hawke's Bay (up 6,000 or 7.8 percent), and Canterbury (up 3,000 or 1.2 percent).

Queenstown recorded the largest decrease (down 11,000 or 4.8 percent), followed by Fiordland (down 4,000 or 12 percent), Wanaka (down 3,000 or 8.0 percent), Ruapehu (down 3,000 or 16 percent), and Marlborough (down 3,000 or 6.5 percent).

Table 5.1

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

RTO area	May guest nights								
	Domestic			International			Total		
	2018	2019	Percent age change	2018	2019	Percent age change	2018	2019	Percent age change
Northland	72,853	75,094	3.1	36,087	34,261	-5.1	108,940	109,355	0.4
Auckland	301,848	334,746	10.9	257,500	237,879	-7.6	559,348	572,625	2.4
Coromandel	27,084	29,542	9.1	12,276	9,442	-23.1	39,360	38,984	-1.0
Waikato	74,566	87,497	17.3	21,430	15,801	-26.3	95,996	103,298	7.6
Bay of Plenty	56,245	54,649	-2.8	24,125	25,532	5.8	80,370	80,181	-0.2
Rotorua	76,852	89,677	16.7	72,423	60,458	-16.5	149,276	150,135	0.6
Taupo	40,008	42,094	5.2	20,614	18,941	-8.1	60,622	61,036	0.7
Whakatane-Kawerau	10,676	13,005	21.8	2,779	2,333	-16.1	13,455	15,338	14.0
Gisborne	22,911	25,331	10.6	3,183	3,025	-5.0	26,094	28,356	8.7
Taranaki	37,145	35,149	-5.4	7,859	7,662	-2.5	45,004	42,812	-4.9
Hawke's Bay	60,512	66,419	9.8	17,354	17,487	0.8	77,866	83,906	7.8
Ruapehu	13,828	11,889	-14.0	5,999	4,849	-19.2	19,826	16,738	-15.6
Manawatu	37,923	41,157	8.5	5,299	4,439	-16.2	43,222	45,596	5.5
Whanganui	11,966	11,436	-4.4	1,882	2,312	22.8	13,848	13,748	-0.7
Wairarapa	14,371	14,324	-0.3	1,807	2,044	13.1	16,178	16,367	1.2
Kapiti-Horowhenua	12,758	14,569	14.2	2,067	1,670	-19.2	14,825	16,239	9.5
Wellington	148,275	158,652	7.0	57,318	57,718	0.7	205,593	216,370	5.2
Marlborough	30,496	28,788	-5.6	12,386	11,316	-8.6	42,882	40,105	-6.5
Nelson-Tasman	49,499	52,572	6.2	24,636	22,944	-6.9	74,135	75,515	1.9
Canterbury	134,963	140,088	3.8	107,894	105,700	-2.0	242,857	245,788	1.2
Hurunui	15,593	14,027	-10.0	5,881	7,256	23.4	21,474	21,283	-0.9
Mackenzie	14,757	15,934	8.0	39,896	38,199	-4.3	54,653	54,132	-1.0
Timaru	13,413	11,321	-15.6	4,923	5,390	9.5	18,336	16,711	-8.9
West Coast	23,576	29,150	23.6	48,851	40,680	-16.7	72,428	69,830	-3.6
Wanaka	13,428	15,142	12.8	29,380	24,249	-17.5	42,808	39,391	-8.0
Queenstown	73,835	69,713	-5.6	152,295	145,612	-4.4	226,130	215,325	-4.8
Waitaki	10,900	11,767	8.0	11,117	8,584	-22.8	22,017	20,351	-7.6
Central Otago	10,157	11,751	15.7	3,772	3,408	-9.6	13,929	15,160	8.8
Dunedin	46,042	50,275	9.2	21,364	17,841	-16.5	67,406	68,115	1.1
Clutha	3,720	3,395	-8.8	1,328	1,295	-2.5	5,048	4,690	-7.1
Fiordland	10,330	8,770	-15.1	25,011	22,250	-11.0	35,341	31,020	-12.2
Southland	23,153	24,957	7.8	8,738	9,697	11.0	31,891	34,654	8.7
Total	1,493,682	1,592,880	6.6	1,047,474	970,273	-7.4	2,541,156	2,563,153	0.9

Table 5.2

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

RTO area	May 2019 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	38.3	45.8	24.0	11.4	21.4	37.2
Auckland	74.4	58.9	42.1	23.1	58.9	63.9
Coromandel	36.5	27.9	10.4	10.6	13.8	21.5
Waikato	62.6	59.6	20.4	12.9	37.1	50.9
Bay of Plenty	52.2	58.2	39.7	18.7	34.2	49.6
Rotorua	70.1	54.8	20.9	18.6	40.9	47.0
Taupo	44.6	42.9	26.3	10.1	28.2	37.4
Whakatane-Kawerau	C	54.5	C	7.8	17.9	48.5
Gisborne	C	59.8	C	7.9	21.9	57.1
Taranaki	41.7	49.9	31.9	13.1	31.5	43.6
Hawke's Bay	60.9	64.4	45.2	15.9	41.5	58.0
Ruapehu	30.3	15.1	9.6	13.0	15.4	15.8
Manawatu	42.6	56.8	C	C	38.9	C
Whanganui	C	47.3	39.6	C	26.9	C
Wairarapa	C	47.5	C	9.4	22.5	39.9
Kapiti-Horowhenua	C	58.8	C	10.7	16.6	24.5
Wellington	77.1	67.7	C	C	66.1	C
Marlborough	36.8	49.0	22.2	18.7	29.5	36.8
Nelson-Tasman	43.3	41.8	37.5	10.6	24.4	40.1
Canterbury	63.2	48.1	35.0	14.0	37.3	49.4
Hurunui	C	42.3	C	12.2	23.3	32.8
Mackenzie	C	40.7	C	23.6	40.3	48.1
Timaru	C	47.5	C	13.6	25.2	41.6
West Coast	38.9	34.7	19.6	11.3	25.7	31.5
Wanaka	38.2	38.4	44.7	13.8	26.5	40.9
Queenstown	61.8	36.9	57.0	19.0	50.5	55.4
Waitaki	28.0	47.0	19.3	10.4	21.8	34.3
Central Otago	C	47.2	C	3.4	11.0	32.9
Dunedin	64.5	69.9	37.7	22.5	52.6	60.5
Clutha	C	35.6	C	6.3	15.8	32.7
Fiordland	32.1	34.6	29.0	16.7	25.8	32.0
Southland	40.8	57.3	27.2	10.6	34.6	43.4
Total	61.9	50.5	34.4	13.2	37.0	50.0

(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 <https://www.stats.govt.nz/topics/accommodation>