



Commercial Accommodation Monitor:

July 2019

Marlborough

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Preface

Commercial Accommodation Monitor: July 2019 – 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).

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

The August 2019 monitor will be released on 14 October 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.

Stats NZ Information Centre

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1 Highlights

Monthly highlights

In July 2019 compared with July 2018:

- Guest nights fell 0.2 percent to 39,832
- International guest nights fell 11.3 percent to 9,381
- Domestic guest nights rose 3.9 percent to 30,451
- The average length of stay fell from 2.16 nights to 2.09 nights
- The overall occupancy rate rose from 27.9 percent to 28.4 percent
- The occupancy rate, excluding holiday parks, was 35.5 percent in July 2019
- Accommodation capacity, excluding holiday parks, rose 1.1 percent.

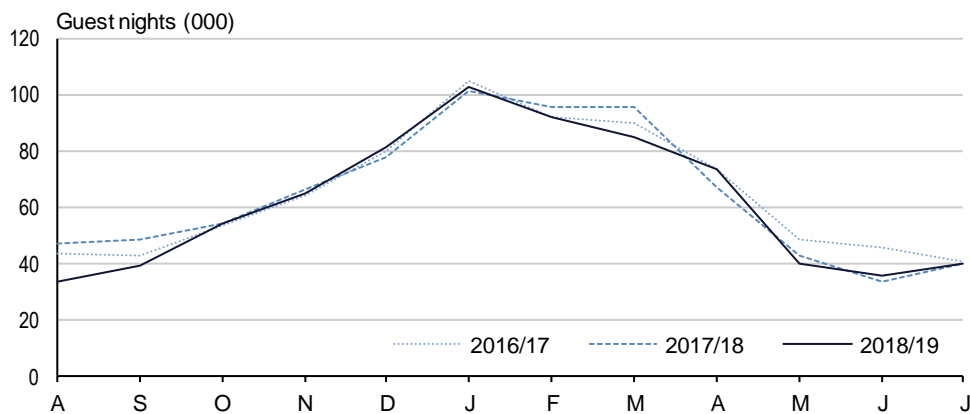
Response rates for July 2019

The response rate for the Marlborough RTO area was 78 percent for July 2019.

The proportion of the origin-of-guest estimate from unadjusted data was 62 percent.

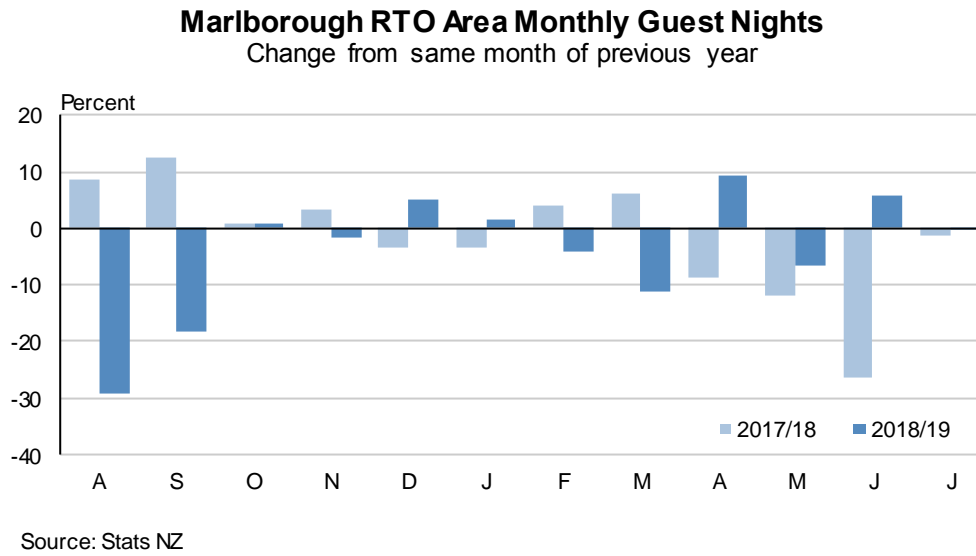
Figure 1.1

Marlborough RTO Area Monthly Guest Nights



Source: Stats NZ

Figure 1.2

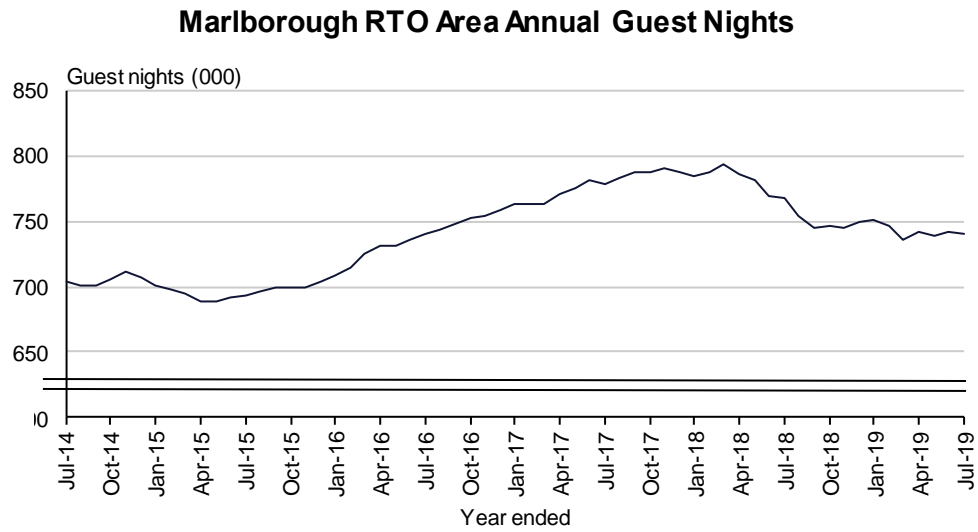


Year ended highlights

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

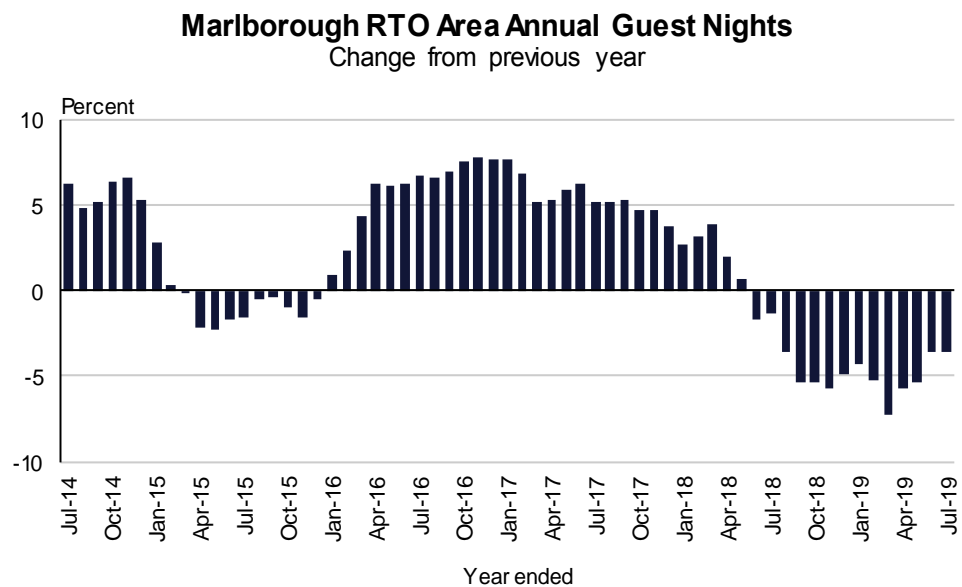
- Guest nights fell 3.5 percent to 740,961
- International guest nights fell 7.4 percent to 295,133
- Domestic guest nights fell 0.7 percent to 445,829
- The average length of stay fell from 1.88 nights to 1.85 nights
- The overall occupancy rate fell from 41.7 percent to 41.1 percent
- The occupancy rate, excluding holiday parks, was 50.1 percent for the year ended July 2019
- Accommodation capacity, excluding holiday parks, fell 4.5 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

2 Accommodation variables

In July 2019, compared with July 2018, there was a decrease of 0.2 percent in total guest nights for the Marlborough RTO area. Motels had the largest decrease, followed by backpackers. Holiday parks had the only increase.

For the year ended July 2019, compared with the previous July year, total guest nights for the Marlborough RTO area decreased 3.5 percent. Backpackers had the largest decrease, followed by motels. 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		
	July		Percentage change	Year ended		Percentage change
	2018	2019		July 2018	July 2019	
Guest nights						
Total guest nights	39,894	39,832	-0.2	767,994	740,961	-3.5
International	10,581	9,381	-11.3	318,879	295,133	-7.4
Domestic	29,313	30,451	3.9	449,116	445,829	-0.7
Hotels	5,377	5,371	-0.1	108,503	106,593	-1.8
Motels/apartments	21,747	20,899	-3.9	323,702	318,461	-1.6
Backpackers	5,053	4,982	-1.4	138,257	105,125	-24.0
Holiday parks	7,716	8,580	11.2	197,531	210,782	6.7
Occupancy rates ⁽³⁾ (%)						
Hotels	35.4	31.6	-10.7	54.1	52.5	-2.9
Motels/apartments	51.5	48.3	-6.4	64.5	61.0	-5.4
Backpackers	23.5	22.1	-6.0	40.5	35.9	-11.3
Holiday parks	12.2	17.2	40.7	23.5	27.5	16.9
Total	27.9	28.4	1.9	41.7	41.1	-1.3
Total excluding holiday parks ⁽⁴⁾	38.5	35.5	-7.9	53.1	50.1	-5.6
Average length of stay ⁽⁵⁾						
Hotels	1.74	1.42	-18.6	1.46	1.47	0.3
Motels/apartments	2.05	2.10	2.8	1.89	1.84	-2.2
Backpackers	3.14	2.35	-25.1	2.23	2.01	-9.9
Holiday parks	2.46	2.69	9.5	1.96	2.06	4.9
Total	2.16	2.09	-3.1	1.88	1.85	-1.5
Guest arrivals						
Hotels	3,094	3,795	22.7	74,074	72,541	-2.1
Motels/apartments	10,626	9,932	-6.5	171,633	172,699	0.6
Backpackers	1,608	2,117	31.7	61,898	52,217	-15.6
Holiday parks	3,141	3,190	1.5	100,858	102,564	1.7
Total	18,469	19,033	3.1	408,463	400,022	-2.1
Establishments						
Hotels	12	13	8.3	12	13	8.3
Motels/apartments	47	46	-2.1	47	46	-2.1
Backpackers	12	15	25.0	12	15	25.0
Holiday parks	15	13	-13.3	15	13	-13.3
Total	86	87	1.2	86	87	1.2
Capacity ⁽⁶⁾						
Hotels	9,331	9,424	1.0	113,217	112,984	-0.2
Motels/apartments	24,304	23,839	-1.9	284,880	284,780	0.0
Backpackers	19,003	19,933	4.9	270,363	240,743	-11.0
Holiday parks	35,867	33,542	-6.5	418,211	417,942	-0.1
Total	88,505	86,738	-2.0	1,086,671	1,056,449	-2.8

(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:

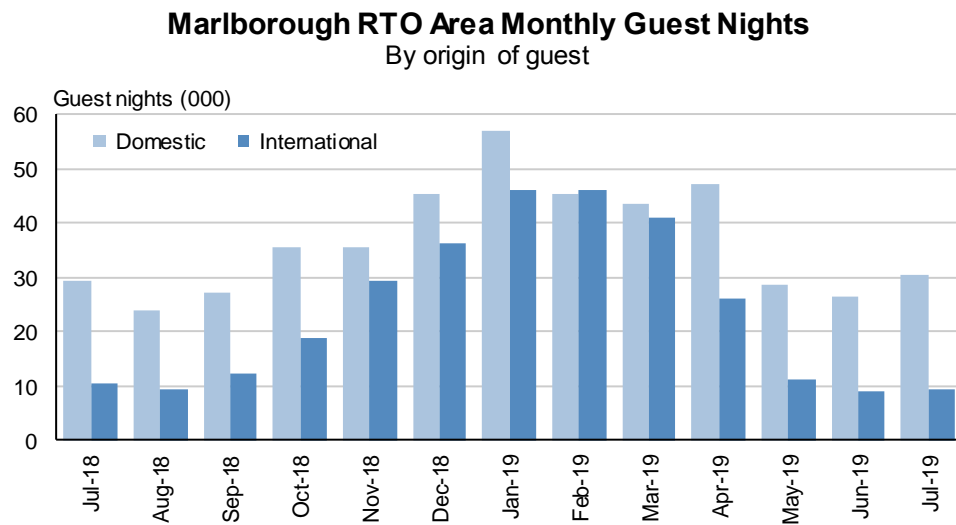
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3 Origin of guests

In July 2019, international guests accounted for 23.6 percent of all guest nights in the Marlborough RTO area. When compared with July 2018, the number of international guest nights spent in the area in July 2019 was down 11.3 percent to 9,381. Domestic guest nights increased 3.9 percent, to 30,451, for the same period.

The proportion of the origin-of-guest estimate from actual data was 62 percent for July 2019.

Figure 3.1



Source: Stats NZ

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							
2018	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
	Nov	35,472	29,538	65,011	1,804,941	1,730,166	3,535,107
	Dec	45,162	36,170	81,332	2,289,702	1,908,866	4,198,568
2019	Jan	56,816	45,998	102,814	2,879,204	2,088,517	4,967,720
	Feb	45,483	46,124	91,606	1,988,788	2,026,586	4,015,374
	Mar	43,693	40,894	84,587	2,125,847	1,882,162	4,008,009
	Apr	47,103	26,152	73,255	2,123,710	1,480,938	3,604,648
	May	28,788	11,316	40,105	1,592,880	970,273	2,563,153
	Jun	26,586	9,091	35,676	1,498,095	799,876	2,297,971
	Jul	30,451	9,381	39,832	1,733,055	965,763	2,698,818
Percent change from the current month of the previous year							
		3.9	-11.3	-0.2	2.7	-2.4	0.8
Year ended							
July 2018		449,116	318,879	767,994	22,377,616	17,519,561	39,897,177
July 2019		445,829	295,133	740,961	23,263,573	17,166,211	40,429,784
Percent change from previous year							
		-0.7	-7.4	-3.5	4.0	-2.0	1.3

(1) Regional tourism organisation

4 National results

In July 2019, a total of 2,699,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 21,000 nights (0.8 percent) from July 2018. The North Island recorded an increase (up 52,000 or 3.3 percent) while the South Island recorded a decrease (down 31,000 or 2.9 percent).

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

Backpackers had the largest increase in guest nights (up 22,000 or 7.3 percent), followed by holiday parks (up 16,000 or 4.7 percent), and hotels (up 3,000 or 0.3 percent). Motels had the only decrease in guest nights (down 20,000 or 2.2 percent).

Refer to Table 4.1 for comparisons of data.

Table 4.1

Marlborough 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
July month					
Marlborough RTO area					
Hotels	5,553	5,377	5,371	-3.2	-0.1
Motels	19,679	21,747	20,899	10.5	-3.9
Backpackers	6,415	5,053	4,982	-21.2	-1.4
Holiday parks	8,751	7,716	8,580	-11.8	11.2
Total	40,398	39,894	39,832	-1.2	-0.2
New Zealand					
Hotels	1,097,658	1,092,547	1,095,699	-0.5	0.3
Motels	909,599	933,010	912,800	2.6	-2.2
Backpackers	330,329	305,118	327,275	-7.6	7.3
Holiday parks	335,847	346,711	363,044	3.2	4.7
Total	2,673,433	2,677,385	2,698,818	0.1	0.8
Year ended July					
Marlborough RTO area					
Hotels	C	108,503	106,593	C	-1.8
Motels	307,230	323,702	318,461	5.4	-1.6
Backpackers	175,048	138,257	105,125	-21.0	-24.0
Holiday parks	C	197,531	210,782	C	6.7
Total	778,266	767,994	740,961	-1.3	-3.5
New Zealand					
Hotels	13,759,289	14,213,106	14,516,173	3.3	2.1
Motels	12,312,954	12,373,496	12,464,285	0.5	0.7
Backpackers	5,173,195	5,098,919	4,996,349	-1.4	-2.0
Holiday parks	7,749,886	8,211,656	8,452,978	6.0	2.9
Total	38,995,323	39,897,177	40,429,784	2.3	1.3

5 Regional comparison

In July 2019, Wellington recorded the largest increase in guest nights (up 22,000 or 10 percent) from July 2018. This was followed by Auckland (up 11,000 or 2.1 percent), Rotorua (up 11,000 or 6.8 percent), Bay of Plenty (up 7,000 or 11 percent), and Nelson-Tasman (up 7,000 or 11 percent).

Canterbury recorded the largest decrease (down 13,000 or 4.7 percent), followed by Taupo (down 8,000 or 9.1 percent), West Coast (down 6,000 or 9.9 percent), Manawatu (down 6,000 or 11 percent), and Ruapehu (down 5,000 or 10 percent).

Table 5.1

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

RTO area	July guest nights								
	Domestic			International			Total		
	2018	2019	Percent age change	2018	2019	Percent age change	2018	2019	Percent age change
Northland	63,618	65,335	2.7	27,127	25,588	-5.7	90,744	90,924	0.2
Auckland	315,885	326,533	3.4	233,169	233,882	0.3	549,054	560,415	2.1
Coromandel	29,863	31,229	4.6	8,321	7,463	-10.3	38,185	38,692	1.3
Waikato	78,302	87,828	12.2	19,322	16,274	-15.8	97,624	104,101	6.6
Bay of Plenty	52,789	60,520	14.6	16,433	16,159	-1.7	69,222	76,679	10.8
Rotorua	109,263	113,921	4.3	51,361	57,581	12.1	160,624	171,502	6.8
Taupo	62,704	58,694	-6.4	23,162	19,320	-16.6	85,866	78,014	-9.1
Whakatane-Kawerau	11,971	12,539	4.7	2,141	2,010	-6.1	14,111	14,549	3.1
Gisborne	20,791	22,793	9.6	2,215	2,849	28.7	23,006	25,642	11.5
Taranaki	36,262	40,643	12.1	6,645	7,055	6.2	42,907	47,697	11.2
Hawke's Bay	58,690	63,602	8.4	14,501	15,288	5.4	73,191	78,890	7.8
Ruapehu	41,948	39,055	-6.9	11,271	8,802	-21.9	53,219	47,858	-10.1
Manawatu	44,955	41,319	-8.1	6,815	4,846	-28.9	51,769	46,165	-10.8
Whanganui	13,966	11,842	-15.2	1,660	1,973	18.9	15,627	13,815	-11.6
Wairarapa	14,749	15,375	4.2	999	1,153	15.4	15,748	16,528	5.0
Kapiti-Horowhenua	15,085	15,332	1.6	2,423	2,263	-6.6	17,509	17,595	0.5
Wellington	162,050	170,183	5.0	45,044	58,539	30.0	207,094	228,722	10.4
Marlborough	29,313	30,451	3.9	10,581	9,381	-11.3	39,894	39,832	-0.2
Nelson-Tasman	44,316	48,571	9.6	16,633	19,082	14.7	60,948	67,653	11.0
Canterbury	161,223	156,076	-3.2	104,333	96,928	-7.1	265,556	253,003	-4.7
Hurunui	20,588	17,058	-17.1	8,482	7,545	-11.0	29,070	24,603	-15.4
Mackenzie	21,499	22,559	4.9	31,988	29,761	-7.0	53,487	52,320	-2.2
Timaru	15,015	13,399	-10.8	4,415	4,073	-7.7	19,430	17,472	-10.1
West Coast	28,459	28,223	-0.8	32,290	26,528	-17.8	60,748	54,750	-9.9
Wanaka	31,278	31,861	1.9	41,487	37,710	-9.1	72,765	69,570	-4.4
Queenstown	102,111	109,134	6.9	215,702	206,999	-4.0	317,813	316,133	-0.5
Waitaki	13,631	12,918	-5.2	7,349	7,240	-1.5	20,980	20,158	-3.9
Central Otago	10,677	10,161	-4.8	2,940	2,361	-19.7	13,617	12,522	-8.0
Dunedin	43,730	42,989	-1.7	16,742	13,498	-19.4	60,472	56,487	-6.6
Clutha	3,899	2,798	-28.2	711	882	24.0	4,611	3,680	-20.2
Fiordland	8,106	8,348	3.0	15,975	15,110	-5.4	24,082	23,458	-2.6
Southland	21,337	21,766	2.0	7,076	7,621	7.7	28,413	29,387	3.4
Total	1,688,075	1,733,055	2.7	989,310	965,763	-2.4	2,677,385	2,698,818	0.8

Table 5.2

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

RTO area	July 2019 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	28.3	41.7	17.0	10.5	18.3	30.5
Auckland	70.6	61.5	44.4	18.7	57.4	62.8
Coromandel	38.1	28.4	11.6	9.1	13.0	22.8
Waikato	60.6	60.7	21.5	11.1	36.8	51.1
Bay of Plenty	51.4	58.2	32.9	18.7	32.8	46.8
Rotorua	65.9	58.9	24.2	18.5	41.5	47.8
Taupo	52.0	52.4	23.9	11.5	31.8	42.2
Whakatane-Kawerau	C	52.5	C	6.9	15.9	43.1
Gisborne	C	56.6	C	6.9	20.1	48.1
Taranaki	45.4	51.6	22.4	11.5	31.2	43.7
Hawke's Bay	52.8	61.4	34.0	14.6	37.6	51.4
Ruaapehu	62.6	34.7	C	C	36.3	C
Manawatu	46.4	55.7	C	C	37.7	C
Whanganui	C	50.3	43.0	C	26.8	C
Wairarapa	39.8	41.8	-	9.0	22.1	41.0
Kapiti-Horowhenua	C	60.0	C	11.3	18.7	32.1
Wellington	74.5	68.8	C	C	64.2	C
Marlborough	31.6	48.3	22.1	17.2	28.4	35.5
Nelson-Tasman	38.2	41.8	29.2	7.9	20.5	35.6
Canterbury	58.2	49.2	31.8	13.1	35.5	47.0
Hurunui	C	44.3	C	12.4	23.9	33.4
Mackenzie	C	36.7	C	17.6	37.0	46.1
Timaru	C	48.4	C	12.4	25.3	44.0
West Coast	23.9	33.0	14.7	8.1	19.0	23.6
Wanaka	64.5	77.6	51.6	15.4	37.7	62.6
Queenstown	81.2	69.5	74.2	24.1	69.5	76.6
Waitaki	31.8	48.7	C	C	20.8	C
Central Otago	C	48.2	C	2.4	9.1	32.8
Dunedin	49.2	60.3	30.2	17.6	42.7	49.5
Clutha	C	38.9	C	C	13.1	C
Fiordland	21.1	26.3	18.5	11.7	17.7	21.9
Southland	43.4	54.0	17.3	7.8	32.9	40.3
Total	60.9	53.0	34.8	12.1	37.1	50.6

(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>