



Commercial Accommodation Monitor:

March 2019

Southland

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Preface

Commercial Accommodation Monitor: March 2019 – Southland presents comprehensive and impartial information on short-term commercial accommodation for the Southland 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 authorities:

- Gore District
- Invercargill City
- part of Southland 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 April 2019 monitor will be released on 17 June 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

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1 Highlights

Monthly highlights

In March 2019 compared with March 2018:

- Guest nights fell 2.9 percent to 54,221
- International guest nights fell 11.5 percent to 24,732
- Domestic guest nights rose 5.8 percent to 29,489
- The average length of stay fell from 1.76 nights to 1.56 nights
- The overall occupancy rate fell from 51.6 percent to 46.4 percent
- The occupancy rate, excluding holiday parks, was 55.7 percent in March 2019
- Accommodation capacity, excluding holiday parks, rose 2.3 percent.

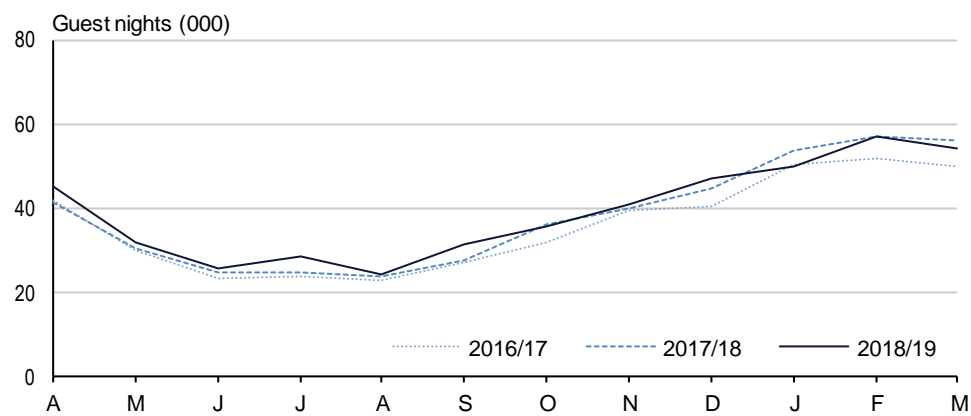
Response rates for March 2019

The response rate for the Southland RTO area was 80 percent for March 2019.

The proportion of the origin-of-guest estimate from unadjusted data was 77 percent.

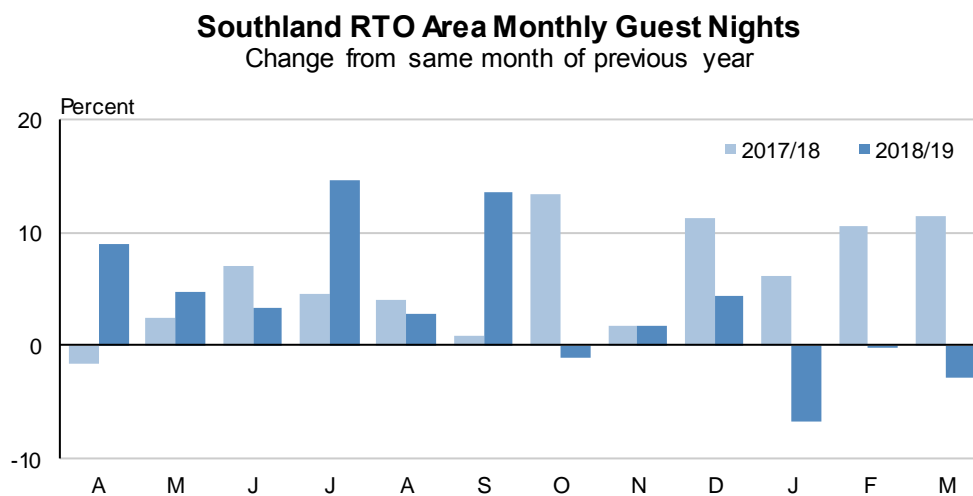
Figure 1.1

Southland RTO Area Monthly Guest Nights



Source: Stats NZ

Figure 1.2



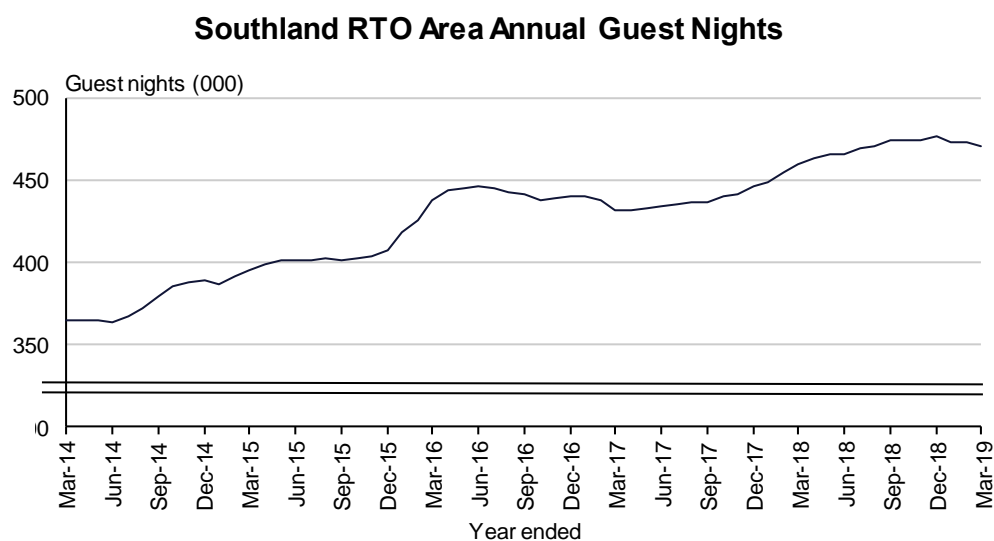
Source: Stats NZ

Year ended highlights

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

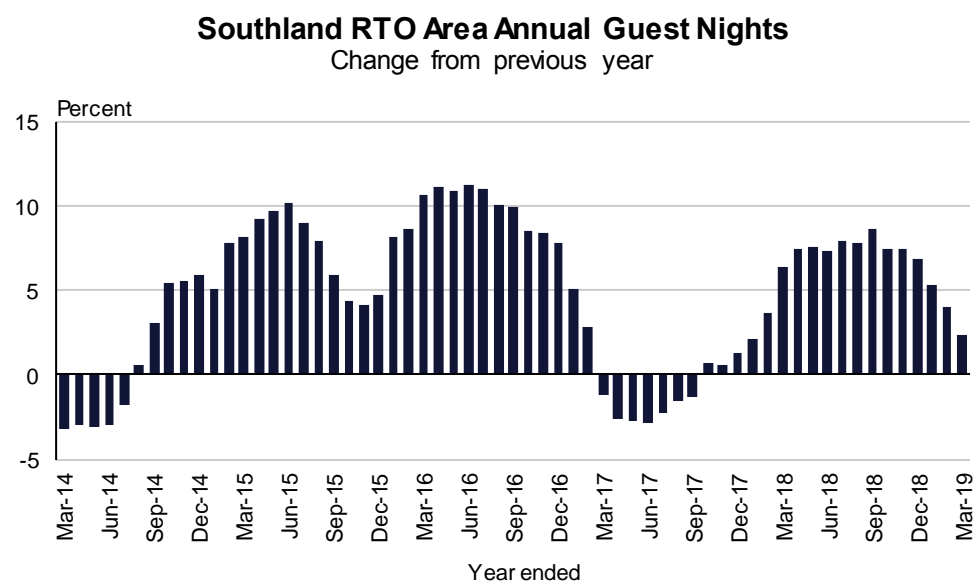
- Guest nights rose 2.4 percent to 470,887
- International guest nights rose 6.7 percent to 188,583
- Domestic guest nights fell 0.3 percent to 282,304
- The average length of stay fell from 1.74 nights to 1.71 nights
- The overall occupancy rate rose from 36.8 percent to 37.4 percent
- The occupancy rate, excluding holiday parks, was 45.5 percent for the year ended March 2019
- Accommodation capacity, excluding holiday parks, rose 0.6 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

2 Accommodation variables

In March 2019, compared with March 2018, there was a decrease of 2.9 percent in total guest nights for the Southland RTO area. Holiday parks had the largest decrease, followed by motels. Backpackers had the only increase.

For the year ended March 2019, compared with the previous March year, total guest nights for the Southland RTO area increased 2.4 percent. Motels had the largest increase, followed by hotels. Holiday parks had the only decrease.

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

Table 2.1

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

Accommodation type	Monthly			Annual		
	March		Percentage change	Year ended		Percentage change
	2018	2019		March 2018	March 2019	
Guest nights						
Total guest nights	55,836	54,221	-2.9	459,937	470,887	2.4
International	27,953	24,732	-11.5	176,791	188,583	6.7
Domestic	27,883	29,489	5.8	283,146	282,304	-0.3
Hotels	14,812	14,432	-2.6	116,755	122,394	4.8
Motels/apartments	20,478	20,016	-2.3	194,251	200,449	3.2
Backpackers	7,607	8,326	9.5	64,589	65,163	0.9
Holiday parks	12,939	11,447	-11.5	84,342	82,880	-1.7
Occupancy rates ⁽³⁾ (%)						
Hotels	59.8	57.8	-3.4	41.8	C	C
Motels/apartments	64.5	61.9	-4.0	53.8	54.5	1.5
Backpackers	45.9	45.9	0.0	35.2	C	C
Holiday parks	37.2	25.6	-31.1	18.9	18.7	-1.3
Total	51.6	46.4	-10.2	36.8	37.4	1.8
Total excluding holiday parks ⁽⁴⁾	57.4	55.7	-2.9	44.6	45.5	1.9
Average length of stay ⁽⁵⁾						
Hotels	1.73	1.54	-11.0	1.56	1.62	3.4
Motels/apartments	1.78	1.73	-3.2	1.86	1.87	0.4
Backpackers	1.89	1.57	-17.2	1.88	1.65	-12.0
Holiday parks	1.69	1.35	-19.8	1.67	1.56	-6.4
Total	1.76	1.56	-11.3	1.74	1.71	-1.9
Guest arrivals						
Hotels	8,553	9,360	9.4	74,712	75,761	1.4
Motels/apartments	11,485	11,602	1.0	104,393	107,245	2.7
Backpackers	4,014	5,304	32.1	34,419	39,446	14.6
Holiday parks	7,676	8,473	10.4	50,626	53,131	4.9
Total	31,728	34,738	9.5	264,149	275,583	4.3
Establishments						
Hotels	18	19	5.6	18	19	5.6
Motels/apartments	39	39	0.0	39	39	0.0
Backpackers	13	13	0.0	13	13	0.0
Holiday parks	9	10	11.1	9	10	11.1
Total	79	81	2.5	79	81	2.5
Capacity ⁽⁶⁾						
Hotels	15,221	15,407	1.2	172,302	172,424	0.1
Motels/apartments	18,507	18,879	2.0	217,599	218,519	0.4
Backpackers	14,384	14,942	3.9	158,803	160,813	1.3
Holiday parks	19,530	22,320	14.3	240,700	236,028	-1.9
Total	67,642	71,548	5.8	789,404	787,784	-0.2

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

(2) Irregular events, such as airshows 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:

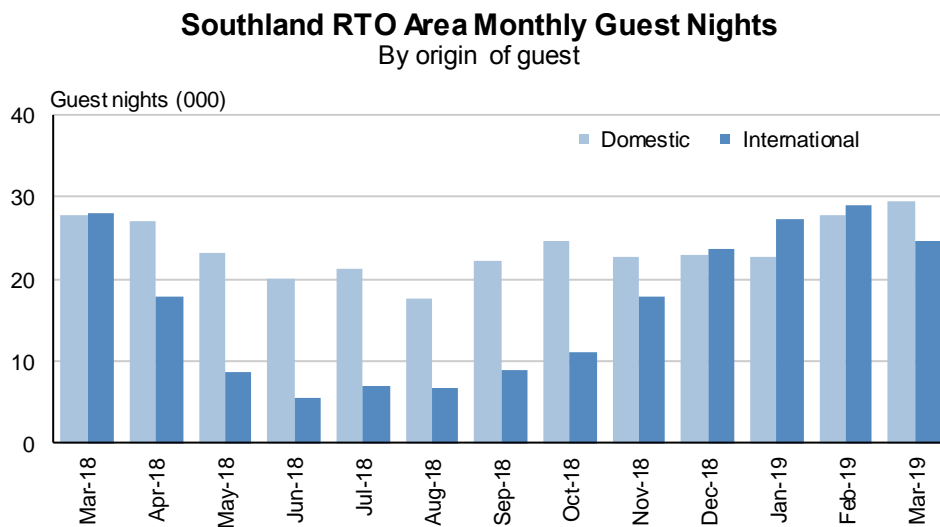
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3 Origin of guests

In March 2019, international guests accounted for 45.6 percent of all guest nights in the Southland RTO area. When compared with March 2018, the number of international guest nights spent in the area in March 2019 was down 11.5 percent to 24,732. Domestic guest nights increased 5.8 percent, to 29,489, for the same period.

The proportion of the origin-of-guest estimate from actual data was 77 percent for March 2019.

Figure 3.1



Source: Stats NZ

Table 3.1

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

		Southland RTO ⁽¹⁾ area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2018	Mar	27,883	27,953	55,836	2,180,388	1,996,067	4,176,455
	Apr	27,116	17,788	44,904	1,860,719	1,569,372	3,430,091
	May	23,153	8,738	31,891	1,493,682	1,047,474	2,541,156
	Jun	20,151	5,589	25,740	1,443,331	824,407	2,267,738
	Jul	21,337	7,076	28,413	1,688,075	989,310	2,677,385
	Aug	17,734	6,675	24,409	1,571,502	952,679	2,524,181
	Sep	22,346	8,812	31,158	1,701,704	1,046,180	2,747,884
	Oct	24,689	11,083	35,772	1,954,146	1,314,205	3,268,352
	Nov	22,670	17,995	40,665	1,804,941	1,730,166	3,535,107
	Dec	23,035	23,764	46,799	2,289,702	1,908,866	4,198,568
2019	Jan	22,761	27,301	50,062	2,879,204	2,088,517	4,967,720
	Feb	27,823	29,030	56,853	1,988,788	2,026,586	4,015,374
	Mar	29,489	24,732	54,221	2,125,847	1,882,162	4,008,009
Percent change from the current month of the previous year							
		5.8	-11.5	-2.9	-2.5	-5.7	-4.0
Year ended							
March 2018		283,146	176,791	459,937	22,336,355	17,589,971	39,926,326
March 2019		282,304	188,583	470,887	22,801,640	17,379,925	40,181,565
Percent change from previous year							
		-0.3	6.7	2.4	2.1	-1.2	0.6

(1) Regional tourism organisation

4 National results

In March 2019, a total of 4,008,000 guest nights were spent in short-term commercial accommodation in New Zealand, a decrease of 168,000 nights (4.0 percent) from March 2018. Both the North Island (down 42,000 or 1.8 percent) and South Island (down 127,000 or 7.0 percent) recorded a decrease.

All four accommodation types recorded a decrease in guest nights in March 2019, compared with March 2018.

Holiday parks had the largest decrease in guest nights (down 93,000 or 9.8 percent), followed by motels (down 37,000 or 2.9 percent), backpackers (down 29,000 or 5.2 percent), and hotels (down 10,000 or 0.7 percent).

Refer to Table 4.1 for comparisons of data.

Table 4.1

Southland and New Zealand Guest Nights					
<i>By accommodation type</i>					
<i>Monthly and year ended</i>					
Accommodation type	Total guest nights			Percentage change	
	2017	2018	2019	2017 to 2018	2018 to 2019
March month					
Southland RTO area					
Hotels	11,680	14,812	14,432	26.8	-2.6
Motels	19,731	20,478	20,016	3.8	-2.3
Backpackers	9,292	7,607	8,326	-18.1	9.5
Holiday parks	9,385	12,939	11,447	37.9	-11.5
Total	50,087	55,836	54,221	11.5	-2.9
New Zealand					
Hotels	1,319,617	1,397,036	1,387,506	5.9	-0.7
Motels	1,218,959	1,269,177	1,232,259	4.1	-2.9
Backpackers	564,612	559,803	530,928	-0.9	-5.2
Holiday parks	762,854	950,438	857,316	24.6	-9.8
Total	3,866,041	4,176,455	4,008,009	8.0	-4.0
Year ended March					
Southland RTO area					
Hotels	112,973	116,755	122,394	3.3	4.8
Motels	191,466	194,251	200,449	1.5	3.2
Backpackers	58,702	64,589	65,163	10.0	0.9
Holiday parks	68,996	84,342	82,880	22.2	-1.7
Total	432,138	459,937	470,887	6.4	2.4
New Zealand					
Hotels	13,608,694	14,159,505	14,457,750	4.0	2.1
Motels	12,116,088	12,378,138	12,437,360	2.2	0.5
Backpackers	5,160,611	5,181,864	4,982,850	0.4	-3.8
Holiday parks	7,532,883	8,206,819	8,303,605	8.9	1.2
Total	38,418,275	39,926,326	40,181,565	3.9	0.6

5 Regional comparison

In March 2019, West Coast recorded the largest decrease in guest nights (down 25,000 or 14.4 percent) from March 2018. This was followed by Northland (down 21,000 or 9.9 percent), Nelson-Tasman (down 21,000 or 12.3 percent), Rotorua (down 17,000 or 7.1 percent), and Taupo (down 13,000 or 10.7 percent).

Waikato recorded the largest increase (up 13,000 or 8.8 percent), followed by Wellington (up 9,000 or 3.4 percent), Hawke's Bay (up 6,000 or 5.0 percent), Mackenzie (up 3,000 or 3.3 percent), and Manawatu (up 3,000 or 4.7 percent).

Table 5.1

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

RTO area	March guest nights								
	Domestic			International			Total		
	2018	2019	Percent age change	2018	2019	Percent age change	2018	2019	Percent age change
Northland	130,831	115,581	-11.7	82,014	76,240	-7.0	212,845	191,821	-9.9
Auckland	353,304	357,966	1.3	354,927	344,393	-3.0	708,230	702,359	-0.8
Coromandel	62,894	59,593	-5.2	39,304	37,919	-3.5	102,197	97,512	-4.6
Waikato	99,683	116,496	16.9	47,209	43,289	-8.3	146,892	159,785	8.8
Bay of Plenty	87,268	86,971	-0.3	33,039	32,754	-0.9	120,307	119,725	-0.5
Rotorua	116,347	111,971	-3.8	120,608	108,239	-10.3	236,955	220,211	-7.1
Taupo	66,345	60,323	-9.1	53,251	46,421	-12.8	119,596	106,744	-10.7
Whakatane-									
Kawerau	22,399	19,900	-11.2	7,715	6,558	-15.0	30,115	26,458	-12.1
Gisborne	33,932	33,693	-0.7	6,169	7,973	29.2	40,102	41,666	3.9
Taranaki	57,008	55,293	-3.0	14,311	13,433	-6.1	71,318	68,726	-3.6
Hawke's Bay	80,692	87,818	8.8	39,168	38,041	-2.9	119,860	125,859	5.0
Ruapehu	26,282	25,998	-1.1	20,739	18,535	-10.6	47,021	44,534	-5.3
Manawatu	47,135	51,700	9.7	9,490	7,594	-20.0	56,625	59,293	4.7
Whanganui	15,314	14,421	-5.8	6,001	5,175	-13.8	21,315	19,596	-8.1
Wairarapa	23,807	22,020	-7.5	5,819	5,126	-11.9	29,626	27,146	-8.4
Kapiti-Horowhenua	23,636	25,039	5.9	5,597	5,078	-9.3	29,234	30,117	3.0
Wellington	165,718	176,228	6.3	98,819	97,365	-1.5	264,537	273,593	3.4
Marlborough	50,044	43,693	-12.7	45,183	40,894	-9.5	95,226	84,587	-11.2
Nelson-Tasman	93,265	76,216	-18.3	76,562	72,740	-5.0	169,826	148,955	-12.3
Canterbury	196,520	192,844	-1.9	211,054	205,767	-2.5	407,574	398,611	-2.2
Hurunui	26,286	19,974	-24.0	14,505	11,825	-18.5	40,791	31,799	-22.0
Mackenzie	23,388	24,687	5.6	61,972	63,511	2.5	85,359	88,197	3.3
Timaru	24,909	19,356	-22.3	13,274	12,424	-6.4	38,183	31,781	-16.8
West Coast	58,327	47,957	-17.8	116,780	102,001	-12.7	175,107	149,959	-14.4
Wanaka	34,921	32,912	-5.8	66,364	58,436	-11.9	101,285	91,348	-9.8
Queenstown	85,949	81,259	-5.5	255,533	256,779	0.5	341,482	338,037	-1.0
Waitaki	28,275	23,635	-16.4	22,968	21,035	-8.4	51,242	44,669	-12.8
Central Otago	27,592	21,979	-20.3	10,827	7,530	-30.4	38,419	29,509	-23.2
Dunedin	57,143	59,184	3.6	51,315	38,534	-24.9	108,457	97,719	-9.9
Clutha	7,275	6,858	-5.7	5,489	5,475	-0.3	12,764	12,334	-3.4
Fiordland	26,017	24,794	-4.7	72,109	66,346	-8.0	98,126	91,140	-7.1
Southland	27,883	29,489	5.8	27,953	24,732	-11.5	55,836	54,221	-2.9
Total	2,180,388	2,125,847	-2.5	1,996,067	1,882,162	-5.7	4,176,455	4,008,009	-4.0

Table 5.2

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

RTO area	March 2019 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	60.8	70.0	39.7	19.9	34.9	58.2
Auckland	85.3	71.0	60.9	33.7	71.7	76.8
Coromandel	58.8	59.4	31.5	24.0	31.0	47.6
Waikato	83.0	71.9	50.3	30.7	55.6	69.7
Bay of Plenty	83.0	73.6	49.5	29.9	47.8	65.7
Rotorua	85.9	76.7	36.4	34.7	57.8	64.2
Taupo	65.1	66.5	50.6	24.7	48.6	60.3
Whakatane-Kaw erau	C	70.6	C	14.2	26.4	63.5
Gisborne	C	72.4	C	15.5	29.7	62.3
Taranaki	49.9	62.7	36.5	32.1	44.8	53.1
Haw ke's Bay	75.1	78.3	82.0	31.3	60.1	78.6
Ruapehu	53.3	37.3	30.8	39.2	37.8	37.5
Manaw atu	54.9	71.2	C	C	50.5	C
Whanganui	C	56.8	52.6	C	38.6	C
Wairarapa	C	63.7	C	20.1	34.4	53.4
Kapiti-Horow henua	C	73.9	C	19.4	27.1	35.8
Wellington	86.7	80.8	C	C	76.9	C
Marlborough	74.0	77.1	51.3	40.2	56.3	66.7
Nelson-Tasman	67.5	69.6	66.9	21.5	43.1	68.1
Canterbury	81.5	77.2	52.3	26.5	55.7	70.7
Hurunui	58.7	56.1	32.9	20.7	35.0	47.3
Mackenzie	C	70.8	C	47.8	67.5	77.5
Timaru	C	68.5	C	26.2	41.3	62.4
West Coast	61.5	68.8	44.3	35.4	51.6	58.0
Wanaka	68.0	84.6	77.6	36.9	55.3	76.1
Queenstow n	86.2	75.1	80.1	44.6	76.9	82.1
Waitaki	52.6	72.0	46.5	9.0	19.5	59.4
Central Otago	C	75.5	C	8.2	20.0	54.7
Dunedin	81.2	81.1	44.9	44.4	67.2	73.1
Clutha	C	63.3	C	19.4	32.4	50.8
Fiordland	81.0	73.1	67.0	52.5	65.7	73.3
Southland	57.8	61.9	45.9	25.6	46.4	55.7
Total	78.7	71.5	53.9	25.7	53.2	68.8

(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 Local authority area results

Table 6.1 shows results for the individual local authority areas in the Southland RTO area.

Table 6.1

Local Authority and Southland Accommodation Results⁽¹⁾

Accommodation type	March 2019 results				
	Establish-ments	Capacity	Guest Nights	Average stay length	Occupancy rate
	Number			Days	Percent
Southland District (part of) ⁽²⁾					
Hotels	11	6,169	6,013	1.63	57.38
Motels	9	1,705	2,110	1.67	68.50
Backpackers	9	8,525	C	C	C
Holiday parks	4	10,726	C	C	C
Total	33	27,125	20,369	1.45	46.42
Gore District					
Hotels	3	1,922	C	C	C
Motels	4	1,519	1,981	1.70	75.77
Backpackers	-	-	-	-	-
Holiday parks	1	2,170	C	C	C
Total	8	5,611	3,705	1.53	41.37
Invercargill City					
Hotels	5	7,316	C	C	C
Motels	26	15,655	15,925	1.74	59.83
Backpackers	4	6,417	C	C	C
Holiday parks	5	9,424	5,058	1.55	26.94
Total	40	38,812	30,147	1.65	47.03
Southland Regional Tourism Organisation area					
Hotels	19	15,407	14,432	1.54	57.80
Motels	39	18,879	20,016	1.73	61.89
Backpackers	13	14,942	8,326	1.57	45.87
Holiday parks	10	22,320	11,447	1.35	25.63
Total	81	71,548	54,221	1.56	46.35

(1) The Accommodation Survey is designed at the regional (RTO by accommodation type) level to meet data quality standards. Care should therefore be taken with data at the local authority level.

(2) Southland District is divided between the Southland and Fiordland RTO areas.

Symbol:

C confidential

... not applicable

7 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>